

Kuali Build - Patch from Email to Approver

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Topic: Use a 'Patch' to convert an email address from an API into a KB 'Person' for Approvals

API Connection in App Form

If the API is already created and connected to your app by Campus Kuali Build, then...

- Use 'Data Lookup (List)' > Data Source: Choose > External Data > *select one*
- In that gadget, toggle 'on' the 'Add linked auto-filled gadgets'
- Click and drag item from list to the app form [in this case, it's an email address]

Patch

- Use 'Data Lookup (Single Item)'
 - Add a Label (title) for this gadget
 - Data Source: Choose > External Data
 - *select*: 'Internal User Lookup to Typeahead via email (only use for specific API use cases)'
 - Continue
- (still in the gadget) For 'Required Information for Lookup: Email: From data in this form: <select from dropdown choices>' [This is will be the API selection gadget used for data lookup]
- Just to the right of the selection you just made, click on the gear symbol, then select the 'Value to use:' [Those listed will include the auto-filled gadgets from the API that you placed on the form]
- Optional - Select 'Headless Integration' if you do not need to display this gadget on the form.

Use Patch Results in the Workflow

- For an Approval step: Who will approve this step? > *A person specified on this form*
- Which field on the form? < select the patch gadget label/name

The screenshot displays two side-by-side configuration panels in the Kuali Build interface.

DATA LOOKUP (INTEGRATION) SETTINGS

- Gadget Label/Question:** A text box containing "Unit Apvr Email USER".
- Field ID:** wJUAfOD3W-
- Data Source:** Internal User Lookup to Typeahead via email (only use for specific API use cases). A "Change" button is next to it.
- Required Information for Lookup:**
 - Email ***
 - ☒ From data in this form
 - ☐ Fixed value
 - Value to use:** A dropdown menu is open, showing options: Label (selected), ID, Business Office Group, Unit, Admin Officer Email, Admin Officer Name, Unit Approver Email, and Unit Approver Name.
- Required:** A toggle switch is turned on.
- Description/label:** A toggle switch is turned on.
- Headless Integration:** A toggle switch is turned on.
- Add linked auto-filled gadgets:** A toggle switch is turned on.

APPROVAL STEP OPTIONS

- Step Label:** A text box containing "UNIT APPROVER".
- Who will approve at this step? ***
 - ☐ Person(s) in a role of a group, or the group's hierarchy, on the form
 - ☐ Person(s) in a role of any specific group
 - ☒ A person specified on the form
 - ☐ Any specific person
- Which field on the form?** A dropdown menu showing "Unit Apvr Email USER - User".