

Top 10 Ravenna Workflows Handbook

Schools know Ravenna® offers best-in-class recruiting, enrollment, and student management capabilities. To get the most out of this solution, we'll go over how Ravenna's workflow automation can supercharge your school's front office.

Helpful Terms & Tips:

- **Trigger** – this is a query that dictates which records will be pulled into your workflow. Triggers can be either a saved and shared Data Explorer query or a saved and shared All Applicants list
- **Actions** – are what will happen to records that are pulled into the workflow. There are 13 different actions you can take. Actions can be strung together in a workflow to add steps to it.
- If you are going to be using All Applicants lists for trigger queries based on a form question, those questions must have the attribute of **Important**.

1. **Set a Field Based on a Question Response:** Automatically define a field based on an application response—e.g., legacy status or financial aid interest.

a. Trigger

- i. Data Explorer query or saved All Applicants list based on question
- ii. e.g., "Are you interested in applying for Financial Aid?" = YES

b. Action: Set Field

- i. Select Field Name (e.g., isFA)
- ii. Select the New Value for the response
- iii. e.g., For the FA flag, the New Value would be Yes

The screenshot displays a workflow builder interface with three main steps, each with a configuration panel and explanatory text boxes.

- Trigger (331):**
 - Data Explorer:** WF FA 25
 - Explanatory Text:** "This query is looking for anyone who answered Yes to our 'Are you applying for financial aid' question"
 - Configuration:** "application process) Answer 'Are you applying for Financial Aid?' is any of" with a dropdown menu showing ☒ Yes and ☐ No.
- Add Tag (884):**
 - Tag Name:** Financial Aid
 - Explanatory Text:** "Premium Schools can add tags (think of them like a sticky note) on a record. This action will put the 'Financial Aid' tag on the record."
 - Configuration:** Includes an "Upload Photo" button, "Applying to Grade" (9), "Application Type" (Upper school post-deadline application process), and "Add Tag" and "Financial Aid" buttons.
- Set Field (885):**
 - Field Name:** Is FA
 - Value:** to Yes
 - Explanatory Text:** "The 'isFlags' are those checkboxes found in the student profile. This action will mark the isFA field to Yes."
 - Configuration:** A "Flags" section with checkboxes: ☐ Matriculating, ☐ Boarding, ☐ International, ☒ Financial Aid, ☐ Legacy, ☐ Faculty, ☐ Board, and ☐ Sibling.

2. Take Advantage of Custom Fields: Automatically update custom fields based on form responses or profile data. For example, all incoming ninth grade applicants would have the same value for a "Class of" field.

a. Trigger

- Data Explorer query or saved All Applicants list based apply grade with an application status of "Applied, FormsComplete or Complete"
- e.g., All students applying to grade nine

b. Action: Set Field

- Select Field Name (e.g., Class of)
- Select the New Value for the response (e.g. 2030)

3. Confirmation Email for Exploring Applicants: Give interested families a well-timed follow-up email to capture interest after the inquiry form.

a. Trigger

- Data Explorer query or saved All Applicants list
- Application Status = Exploring

b. Action: Send Email

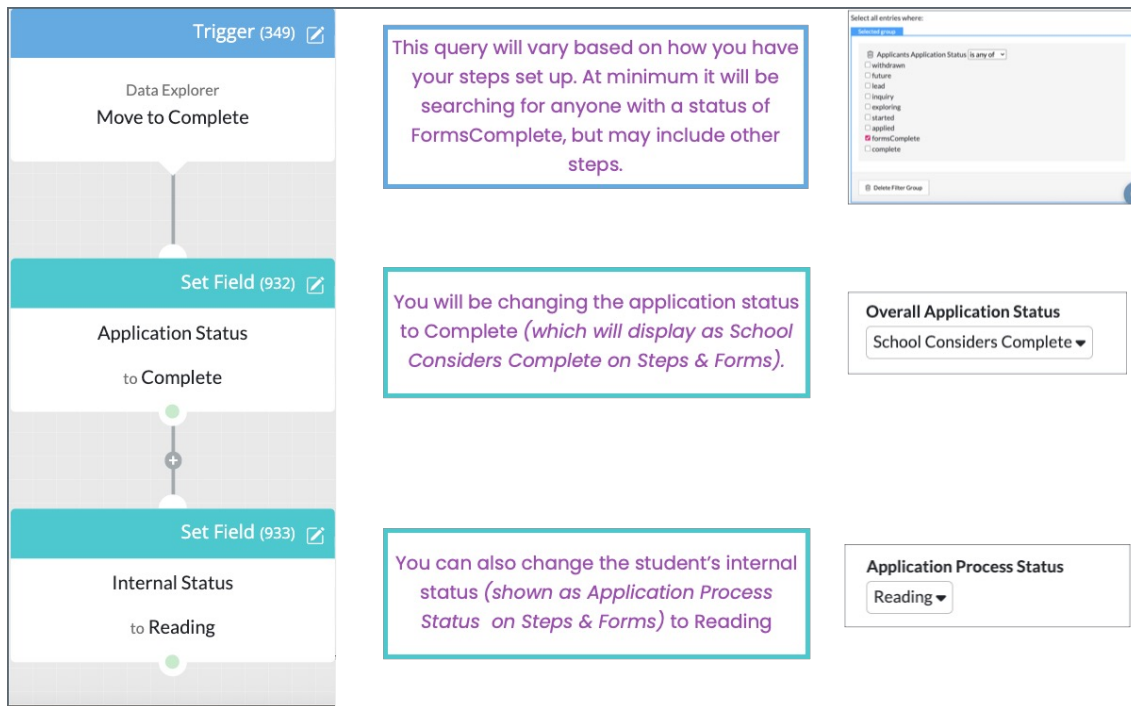
- Email Subject (e.g., Thank you for Exploring)
- Email Recipients
- Email Template

4. Nurture Email Campaign: Automate the backend of entire email sequences without the need for technical expertise.

- a. Trigger
 - i. Data Explorer query or saved All Applicants list
- b. Action: Send Email
 - i. Email Subject
 - ii. Email Recipients
 - iii. Email Template
- c. Action: Wait
 - i. Period of time you want to wait between emails
- d. Action: Run Query
 - i. iRun query based on criteria to see if email campaign was successful (i.e., applicant signed up for an event, submitted initial application, etc.)
- e. Action: Send Email
 - i. If this query brings back records which WERE NOT part of the initial trigger query, those records would NOT be included in the workflow
- f. Action...
 - i. You can add as many additional Waits, Queries and Emails sequences as needed

5. Move to Complete: Move your applicants to Complete student and send them to Reading.

- a. Trigger
 - i. Data Explorer query on application and possibly step status
 - 1. If your required application steps are also required for FormComplete, then the query would just be Application Status=FormsComplete
 - 2. If some of your required steps are not required for FormsComplete, the query would be Application Status = FormsComplete PLUS any other required steps with a status of Complete or Waived
- b. Action: Set Field
 - i. Application Status = Complete
- c. Action: Set Field
 - i. Internal Status = Reading



6. Collaborate on Evaluations: Assign readers or interviewers to student applications automatically.

Scenario: Assigning your learning specialist as a reader to students who indicated they need modifications/accommodations on their application.

- a. Trigger
 - i. Data Explorer query or saved All Applicants list based on question
 - ii. e.g., "Does your child receive accommodations?" = YES
- b. Action: Assign Reader
 - i. Select the reader
 - ii. Choose whether to give them early access

7. Status-Triggering Emails: Send confirmation emails based on a change to an applicant's progression in the admissions cycle.

Scenario: Email applicants when you have received their report cards.

- a. Trigger
 - i. Data Explorer query
 - ii. Step Status–Previous and Current Report Card receipt steps equal Complete or Waived

- b. Action: Send Email
 - i. Email Subject (e.g., We have received all your academic records)
 - ii. Email Recipients
 - iii. Email Template

8. Event Email Campaign: Target applicants based on interests, grade level, or engagement with your school.

Scenario: Inviting applicants who expressed an interest in soccer to your homecoming game.

- a. Trigger
 - i. Data Explorer query based on a form question
 - ii. e.g. Are you interested soccer
- b. Action: Send Email
 - i. Email Subject (e.g., Join us at Homecoming)
 - ii. Email Recipients
 - iii. Email Template
- c. Action: Wait Until
 - i. A date a week before the event
- d. Action: Run Query
 - i. Run query based on criteria to see if the email campaign was successful (i.e., the soccer people registered to attend)
 - ii. *Please note:* If this query brings back records which WERE NOT part of the initial trigger query, those records would NOT be included in the workflow midstream.
- e. Action: Send Email
 - i. We send another email to those applicants who still have not registered for the event

9. Automate Key Reminders: Email notifications for application open dates, deadlines, and decision notification releases.

Scenario: Send a decision release reminder to all applicants with a status of FormsComplete or Complete.

- a. Trigger
 - i. Data Explorer query or saved All Applicants list based on an application status (could run hourly)
 - 1. Application Status = FormsComplete or Complete
- b. Action: Wait Until
 - i. Wait until one week before decisions are set to be released
- c. Action: Send Email
 - i. Email Subject (e.g., Decisions to be released in One Week)
 - ii. Email Recipients
 - iii. Email Template

The screenshot displays a workflow automation interface with three main steps in a vertical sequence:

- Trigger (422):** Labeled "Data Explorer" and "WF Decision Reminders". A text box explains: "Your query will pull students for whom you will be releasing decisions for - usually these are applicants in the FormsComplete or Complete statuses. This is running every hour starting at the application deadline." To the right, a configuration panel shows "Select all entries where:" with a dropdown menu for "Applicants Application Status (is any of)" and checkboxes for various statuses. "FormsComplete" and "Complete" are selected.
- Wait Until (1130):** Labeled "Delay next action until" with the date and time "03/06/2026 10:00 am". A text box explains: "This action will hold the folks in the work flow until a specific date and time before moving them to their next step. In this case they are being held until a week before decisions will be released."
- Send Email (1140):** Labeled "To: Account, Primary P1" and "Subject: Decisions will be released ne...". A text box explains: "This will send the family an email letting them know when the school will be releasing decisions and how they can see them".

On the right side, there is a panel titled "Upper school application process" with links for "Edit Description", "Edit Dates", "Edit Grades/Fees", and "Delete". It contains instructions: "Please use this application process to apply your student to grades 9, 10, 11 or 12. Please note due to the nature of our program we rarely accept 11th or 12th grade transfers." It lists "Grades: 9, 10, 11, 12" and "Dates" for "Preliminary forms due: 01/17/2026 5:00pm (Enforced)", "Supplemental forms due: 02/07/2026 5:00pm (Enforced)", "Decisions released: 03/13/2026 12:00pm (Enforced)", and "Decision response due: 03/27/2026 12:00pm (Enforced)". A note states: "Since decisions will be released on the 13th - we want to wait until a".

10. Application Confirmation Emails: Once an application is submitted, ensure families know the next steps, expected timelines, and pertinent contact information.

Scenario: While we do have the ability to send a general confirmation email to all students who have applied to your school, some schools want to send targeted confirmations based on grade and program.

a. Trigger

- i. Data Explorer query or saved All Applicants list based on an application status and grade(s)
 - 1. Application Status = Applied
 - 2. Grades = 1-5 (for example)

b. Action: Send Email

- i. Email Subject (e.g., Thank you for submitting your application)
- ii. Email Recipients
- iii. Email Template (You would want to have different templates by grade and/or program that would provide applicants with specific instructions)

