

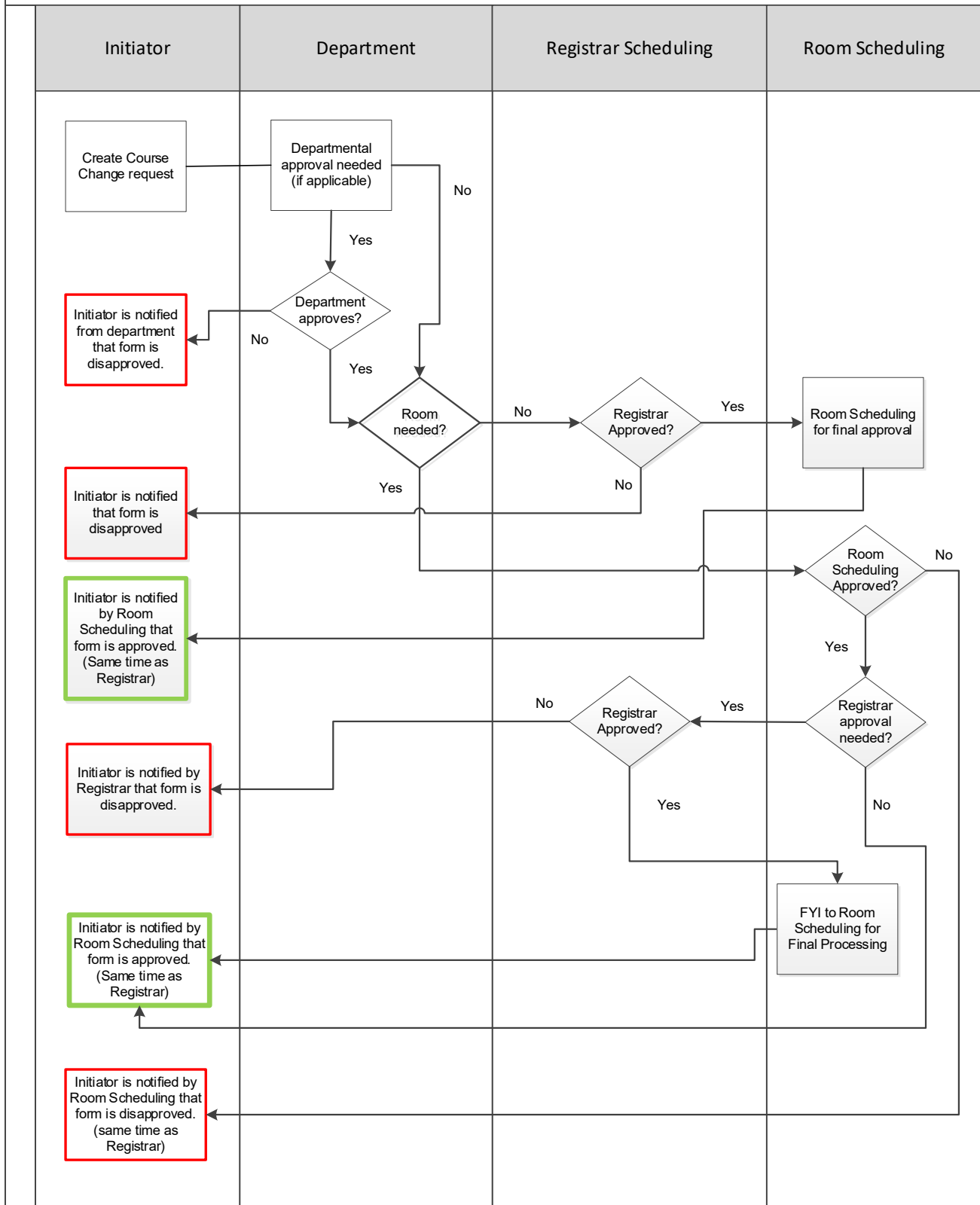
# Course Offering Change Form (COCF) Instructions

## **Document includes:**

1. Course Offering Change Form Workflow Graph
2. Initiator Blank Request Form
3. Initiator Directions
4. Department/Program Head, Registrar, and Room Scheduling directions
5. How to check the progress of a request and view log
6. Making Kualu workflow individualized
7. Filtering – an easy way to look up a request
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10. Course Offering Information Instructions

# Course Offering Change Form Workflow Graph

## Course Change Approvals – workflow



## Initiator Blank Request Form

The course offering change form is available through AccessPlus on the uBusiness tab. Click on the Kuali Workflow options on the left side under the General options. An option to create a request will appear at the top in the left column. Click on Course Offering Change form to activate a new request.

**ACCESSPLUS**  
About | Logout

**Create Request**  
Course Offering Change Form

**Business**  
Account/U-Bill  
cyBUY - SHOPPER  
Student Employment

**General**  
e-Content  
e-Reports (RGSTR)  
File Transf(RGSTR)  
**Kuali Workflow**

**Kuali Workflow**  
**Kuali Workflow Forms**  
This system allows user to submit documents to the kuali workflow routing system. Please select the document type you would like to route from the menu at the left.

**Step 1:**  
Room Scheduling Routing

**Step 2:**  
Dept & Sem/Year

**Step 3:**  
Add Change Drop

**Step 3:**  
Submit

**Create Request**  
Course Offering Change Form

**Business**  
Account/U-Bill  
cyBUY (Shopper)  
FA-Admin

**Students**  
Student Employment

**General**  
Client Menu View  
Faculty Activity  
Kuali Workflow

**Course Offering Changes Form**  
This form is used to submit course offering changes. For more information visit <http://www.registrar.iastate.edu/faculty-staff/offeringinfo>.

**Select one of the following options. \***  
☐ Registrar then Room Scheduling - courses cancelled, WWW, unpublished, course notes, or restrictions  
☐ Room Scheduling then Registrar - adds/changes to FF or HYB courses, includes all general classrooms and departmental spaces  
☐ Room Scheduling only - room location only, no limit changes

**Teaching Dept \*** Choose Dept  
**Semester/Year \*** Choose Semester

\* Required Fields

**Add**

Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room	Course Modality
1.									
2.									
3.									

Add more courses

**Comments**

**Change** (Credit, time, maximum limit only, today limit and maximum limit, room, half-semester message, comments, etc.)

Course Number	Course Section	Change Type	From	To	Course Modality
1.					
2.					
3.					

Change more courses

**Comments**

**Drop**

Course Number	Course Section	Comments
1.		
2.		
3.		

Drop more courses

**Reason For Changes**



**Submit**

## Request and Submit a COCF

### Initiator Directions:

**Step 1:** Select Room Scheduling routing options.

**Kuali Workflow**

Enter keyword   2

## Course Offering Changes Form

Select one of the following options. \*

- ☐ Registrar then Room Scheduling - courses cancelled, WWW, unpublished, course notes, or restrictions
- ☐ Room Scheduling then Registrar - adds/changes to FF or HYB courses, includes all general classrooms and departmental spaces
- ☐ Room Scheduling only - room location only, no limit changes

### Option 1

Routes the request to the Registrar queue first since Room Scheduling isn't necessary. This option is used for course offerings being cancelled, online (WWW), unpublished courses, or restriction changes. Room Scheduling will still approve the request and ensure any rooms are removed from the course offering (if applicable).

### Option 2

Routes the request to Room Scheduling first to ensure a university classroom or departmental space is available. This option is used for any face to face (FF) or hybrid (HYB) courses. The request will route to the Registrar to adjust any limit or section changes that may be necessary.

### Option 3

Routes ONLY to Room Scheduling. Registrar will not see these requests. Use this option only if requesting room changes. If a TDY or MAX limit change is also necessary, then use Option 2 so that the Registrar's Office can adjust limits.

### Notes:

- If the department requires secondary approval, please note that once the initiator submits the request then the form is routed for secondary approval before it routes to the Registrar or Room Scheduling queues.
- The request can be disapproved by the secondary approver, Registrar, or Room Scheduling at any time.
- The request can be returned to a specific level requesting additional changes or information.
- **Do not mix change requests that require different routing on the same form.** For example, if the request is for a WWW course and the first option is selected. However, the same request also indicates changes to a FF course section. This request may be returned to require two different COCFs for the routing needs.
- Forms that request the incorrect Room Scheduling options may be disapproved and returned to the initiator.

**Step 2:** Select Department and Semester.

Only **one teaching department and term may be select for each form**. Change requests that involve a cross listed course should always be processed by the **major teaching department**. The cross listed departments must be noted in the comments sections.

You must select options

Teaching Dept \* Choose Dept ↓

Semester/Year \* Choose Semester ▼

\* Required Fields

Teaching Dept \* E ↓

Semester/Year \* Choose Semester ▼

Teaching Dept \* ↓

Semester/Year \* E APP

\* Required Fields

**Add**

Course Number	Cou	Sec
1.		
2.		
3.		

+ Add more course

**Comments**

ECON

ECONA

ECONS

EDADM

EEB

EEOB

EEOBA

EEOBS

EL PS

ENGL

ENGR

ENSCI

ENT

ENV S

EVENT

EX SP

EXPRO

FCEDS

Click in box, clear *Choose Department*. Type in 1<sup>st</sup> letter or several characters of the department. Click in the down arrow. This will get you closer to your department choice.

### Step 3: Choose to Add, Change or Drop courses.

#### Note:

- All requests made on this form should be complete or the form will be returned requesting additional information.
- If multiple requests are made on the form then all the requests must be approved. For example, if there are multiple requests and one of the course requests needs additional information; then the entire form will be returned and the other requests will be held up. Sometimes it's a best practice to use a new doc id for each request or at least *like* requests.
- Use the comment box in each area to supply additional information that may be needed when processing the form.
- Addition rows are available in each area to accommodate 8 adds 6 changes and 6 drops.

### ADD Course Request

#### Note:

- Instruction Type = LEC, LAB, DIS, COM (Combination), STO (Studio), RES (Research), IS (Independent Study), or EXP (Supervised Experience)
- Course Modality = FF (face to face), HYB (hybrid), WWW (online) is available (see image below).
- If a course is a combined LEC/LAB course, it's helpful to have the segments separated on the form. For example, line 1 may indicate lecture details (LEC, WWW) while line 2 may indicate lab details (LAB, FF). For this example, the course offering would be HYB on the Schedule of Classes since the LEC is WWW and the LAB is FF.
- The comments field can be used to provide as much information as possible regarding the course changes. We recommend using the comment field to provide us details when the course modality is HYB. Hybrid can mean different things like, reduced capacity or maybe the instruction is partly online. Room Scheduling will need as many details as possible so a room location can be assigned to the appropriate course instruction and needs.

#### Add

Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room	Course Modality
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Comments**

FF

HYB

WWW

## CHANGE Course Request

### Note:

- Change type has a drop-down list to select from (image below).
- The Course Modality (FF, HYB, WWW) can be used to help define the course instruction.
- The comments field can be used to provide as much information as possible regarding the course changes. We recommend using the comment field to provide us details when the course modality is HYB. Hybrid can mean different things like, reduced capacity or maybe the instruction is partly online. Room Scheduling will need as many details as possible so a room location can be assigned to the appropriate course instruction and needs.

**Change** (Credit, time, maximum limit only, today limit and maximum limit, room, half-semester message, comments, etc.)

Course Number	Course Section	Change Type	From
1. <input type="text"/>	<input type="text"/>	<div><div></div><div>Credit Time Max Limit Only Today Limit and Max Limit Room Half-Sem Msg Comments Other</div></div>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>		<input type="text"/>
3. <input type="text"/>	<input type="text"/>		<input type="text"/>

[Change more courses](#)

**Comments**

### Change

 (Credit, time, maximum limit only, today limit and maximum limit, room, half-semester message, comments, etc.)

Course Number	Course Section	Change Type	From	To	Course Modality
1. <input type="text"/>	<input type="text"/>	<div></div>	<input type="text"/>	<input type="text"/>	<div><div></div><div>FF HYB WWW</div></div>
2. <input type="text"/>	<input type="text"/>	<div></div>	<input type="text"/>	<input type="text"/>	
3. <input type="text"/>	<input type="text"/>	<div></div>	<input type="text"/>	<input type="text"/>	

[Change more courses](#)

**Comments**

## DROP Course Request

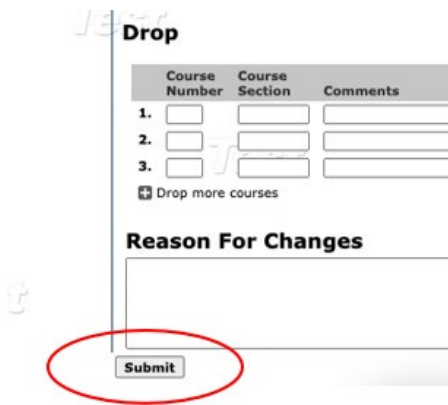
Provide additional comments regarding the drop request. For example, low enrollment, course offered even-year only, etc.

### Drop

Course Number	Course Section	Comments
1. <input type="text"/>	<input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text"/>

[Drop more courses](#)

**Step 4:** Click **Submit** at the bottom of the screen after the form has been filled out.



The screenshot shows a form titled "Drop" with a table for course selection. The table has three columns: "Course Number", "Course Section", and "Comments". There are three rows for selection, numbered 1, 2, and 3. Below the table is a link "Drop more courses". Underneath the table is a section titled "Reason For Changes" with a text area. At the bottom of the form is a "Submit" button, which is circled in red.

	Course Number	Course Section	Comments
1.	<input type="text"/>	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>	<input type="text"/>

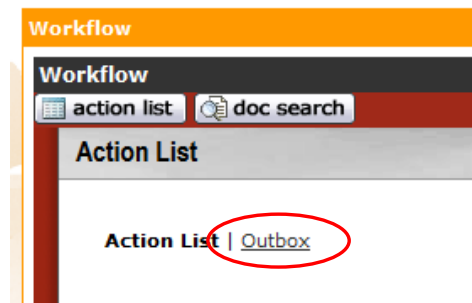
[Drop more courses](#)

**Reason For Changes**

**Submit**

The request will be routed to a secondary approval (if necessary), Registrar queue, or Room Scheduling queue (depending upon the routing option selected).

A copy of the submitted form will automatically appear in the Kualu Outbox of the Initiator.



The screenshot shows a "Workflow" interface. At the top is a "Workflow" header with "action list" and "doc search" buttons. Below this is an "Action List" section. At the bottom of the "Action List" section, there is a link "Outbox" which is circled in red.

**Workflow**

**Workflow**

[action list](#) [doc search](#)

**Action List**

**Action List** | [Outbox](#)

If the request is disapproved, the Initiator will get the form back and will need to submit a different form. If at any point the form is returned to the initiator, then the initiator can edit the existing form and resubmit for approval. Always review the Notes at the bottom of the form for details regarding the request.

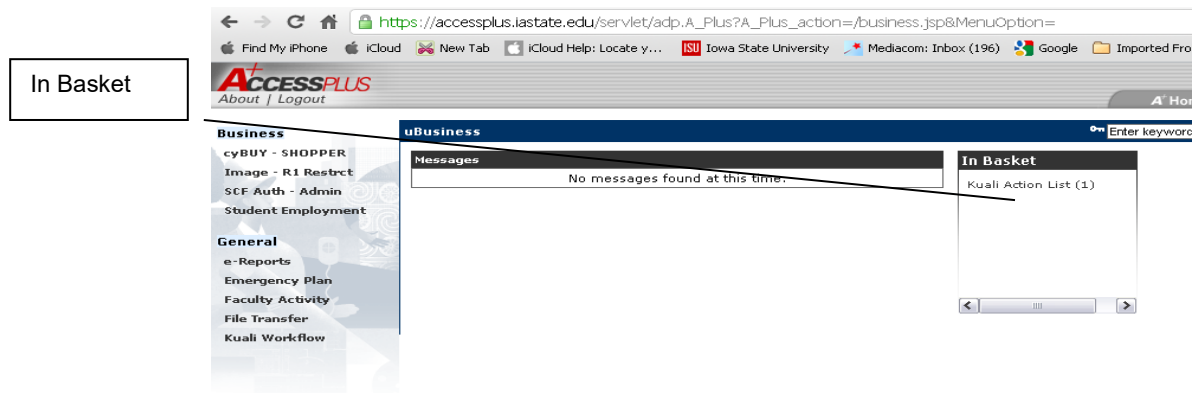
After action has been made you must close the edit document tab and go back to workflow to complete other change requests.

Once approved or disapproved the ID and information is removed from the Action list.



## In Basket

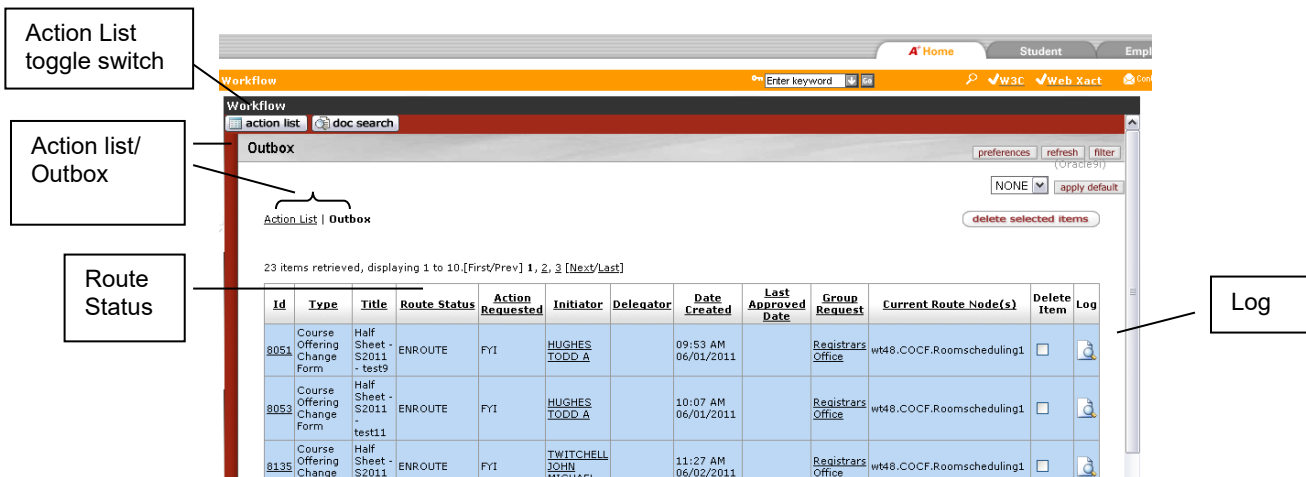
Located under UBusiness tab first page or A+ Home page. Click on Kuali Action list to go to action list/outbox.



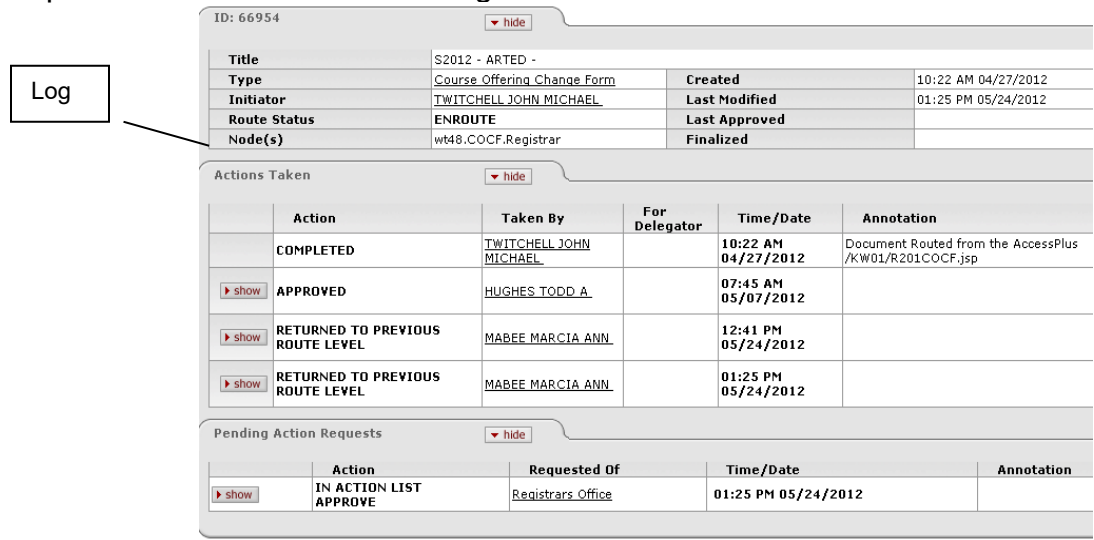
After clicking on Kuali action list the Action List shows first then click on the Outbox option

## Outbox

Tracks what forms have been submitted and their progress.



The Outbox is where the submitted requests are logged. The progress of the activity of the requests can be viewed on the log.



Return to Outbox by clicking on the back arrow at the top left of screen or click on Action list on left side of page. When a request is enroute, approved, or disapproved the progress will show in the Outbox route status.

## Action List

If there is something in the Action List, then action must be taken to complete the process.

Reminder – always review comments/notes at the bottom of the form. If a certain action is needed, there will be instructions. There are 3 possibilities:

### 1. Approve

Initiator will receive the request back into the Action List but at the bottom it will have a button: **FYI**. The **FYI** button must be clicked to approve the request and the request will be removed from the Action List.

**Xworkflow**

Document Type Name: wt48.COCF.DocType  
Document Status: ENROUTE  
Create Date: 03/22/2013  
Document ID: 150058

Editing Document

\*\* Questions with an asterisk are required.

Iowa State University  
Course Offering Change Form

☒ No Room Scheduling approval needed. Departmental Rooms used, all course drops, or request does not affect room assignment.  
☐ Add/Changes where limits are 34 or less; requires University classroom, pending final approval by Room Scheduling.  
☐ Room Scheduling approval needed. Form contains at least one add/change with limits of 35 or greater and utilizes a general university classroom.  
☐ Request room location only.

Routing Option\*

Teaching Dept\* A,B,E  
Semester/Year\* S2013

Add

Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
1. 202	A	Jun 21-Aug 17	2	45	45	Tue/Thu 8:00 AM		
2.								
3.								
4.								
5.								
6.								
7.								
8.								

I really don't need a room - this is for testing purposes only

Comments

Supporting Materials

Use the Create Note box below to attach supporting materials to your request. Notes may be added with or without attachments. Click the red 'save' button on the right.

Create Note

Author	Date	Note	Action
		<div>Attach document View attachments</div>	<div>Save</div>

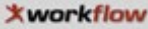
View Notes

Author	Date	Note	Action
Mabee, Maria	03/22/2013 10:04 AM	approved--- just testing	<div>Save Cancel</div>

FYI

## 2. Disapprove

The request cannot be completed. The initiator must create another document id. This request will have a button stating **Acknowledge** and it must be clicked to remove the request from the Action List.



Document Type Name: w48.COCF.DocType

Document Status: ENROUTE

Create Date: 09:44 AM  
03/22/2013

Document ID: 150058

Editing Document

\*\* Questions with an asterisk are required.

Iowa State University  
Course Offering Change Form

Routing Option\*

☒ No Room Scheduling approval needed. Departmental Rooms used, all course drops, or request does not affect room assignment.

☐ Adds/Changes where limits are 34 or less; requires University classroom, Pending final approval by Room Scheduling.

☐ Room Scheduling approval needed. Form contains at least one add/change with limits of 35 or greater and utilizes a general university classroom.

☐ Request room location only.

Teaching Dept\*

A\_B\_E

Semester/Year\*

52013

Add

	Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
1.	202	A	Jun 21-Aug 17	2	45	45	Tue/Thu 8:00 AM		
2.									
3.									
4.									
5.									
6.									
7.									
8.									

Comments

I really don't need a room - this is for testing purposes only

Supporting Materials

Use the Create Note box below to attach supporting materials to your request. Notes may be added with or without attachments. Click the red 'save' button on the right.

Create Note

Author	Date	Note	Action
		<div><div>Attach document</div><div>View attachments</div></div>	<div>Save</div>

View Notes

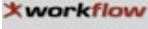
Author	Date	Note	Action
Mabee, Marcia	03/22/2013 10:04 AM	disapproved- testing	<div>edit</div> <div>delete</div>

acknowledge

### 3. Returned to initiator

Additional details required or follow up needed. Initiator must take action if a request is returned. Initiator must open request by clicking on the document id.

- Review the Notes for comments regarding the request.
- Edit the request and Save the changes.
- Approve to re-send the changes for approval.
- Disapprove to start over with a new document id.



Document Type Name: wt48.COCF.DocType

Document Status: ENROUTE

Create Date: 03/22/2013

Document ID: 150058

Editing Document

\*\* Questions with an asterisk are required.

Iowa State University

Course Offering Change Form

Routing Option\*

☒ No Room Scheduling approval needed. Departmental Rooms used, all course drops, or request does not affect room assignment.

☐ Adds/Changes where limits are 34 or less; requires University classroom. Pending final approval by Room Scheduling.

☐ Room Scheduling approval needed. Form contains at least one add/change with limits of 35 or greater and utilizes a general university classroom.

☐ Request room location only.

Teaching Dept\*

A\_B\_F

Semester/Year\*

S2013

Add

	Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
1.	202	A	Jun 21-Aug 17	2	45	45	Tue/Thu 8:00 AM		
2.									
3.									
4.									
5.									
6.									
7.									
8.									

Comments

I really don't need a room - this is for testing purposes only

Supporting Materials

Use the Create Note box below to attach supporting materials to your request. Notes may be added with or without attachments. Click the red 'save' button on the right.

Create Note

Author	Date	Note	Action
Hughes, Todd	03/22/2013	<div><div>Attach document</div><div>View attachments</div></div>	<div>save</div>

View Notes

Author	Date	Note	Action
Mabee, Marcia	03/22/2013 10:03 AM	Returned to initiator	<div>edit</div> <div>delete</div>

save

approve

disapprove

## Department Head, Room Scheduling or Registrar Office

Notification of Action Pending from the Solution Center is sent via e-mail (example below):

From: solution@iastate.edu [mailto:solution@iastate.edu]  
Sent: Friday, June 08, 2012 2:24 PM  
To: marmabee@iastate.edu  
Subject: Action List Reminder

Your Action List has an eDoc(electronic document) that needs your attention.

Your Action List is located on the Home tab of Accessplus.

Document ID: 79913

Initiator: THORLAND-OSTER VICKY

Type: Add/Modify wt48.COCF.DocType

Title: F2012 - E E - DROP/CHANGE

To change how these email notifications are sent (daily, weekly or none):  
Go to the preferences link of your Action List

Go to AccessPlus on home screen click – Kuali Action list In the In Basket

The screenshot shows the AccessPlus web application interface. The top navigation bar includes links for Home, Student, Employee, Faculty/Adviser, and uBusiness. The Home tab is selected, displaying a dashboard with sections for Personal Messages, System Messages, Favorites, and In Basket. The In Basket section shows a link to the Kuali Action List (4). A callout box points to this link with the text: "In Basket: Click Kuali Action list to see what needs to be approved".

Below the dashboard, the "List of what needs to be approved:" section is shown. It displays a table of action items. A callout box points to the "Action List/Outbox" link in the left sidebar, stating: "Action List/Outbox- whichever is bold is the one active". Another callout box points to the "Id" column header in the table, stating: "Id 44510".

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
26513	Distribution Of Income And Expense - test	Distribution Of Income And Expense - test	ENROUTE	APPROVE	FOX STEPHANIE STROCK		02:31 PM 11/25/2011		
44163	Course Offering Change Form	S2012 - ARTED - CHANGE	ENROUTE	APPROVE	MABEE MARCIA ANN		04:16 PM 02/13/2012		
44510	Course Offering Change Form	S2012 - ARTED - DROP	ENROUTE	APPROVE	NIESTER SANDRA E.A		12:56 PM 02/24/2012		
44511	Course Offering Change Form	S2012 - ARTED - CHANGE	ENROUTE	APPROVE	NIESTER SANDRA E.A		12:59 PM 02/24/2012		

Click on Id to bring up request. The Action list is what needs to be addressed.

# Department Head, Room Scheduling and Registrar Office Approval

Tabs

Id- Doc number

Course information

Add

notes

Change

Drop

initiator

Approver must approve, disapprove, or back to previous or save

Back to previous

Drop down box to select who needs to make changes if returning to previous option is selected. This also shows who last approved the action

Workflow Document Viewer

Document Type Name: w48.COCF.DocTyp  
 Document Status: FINAL  
 Create Date: 09:03 AM 06/25/2012  
 Document ID: 84560

Viewing Document

\*\* Questions with an asterisk are required.

Iowa State University  
 Course Offering Change Form

Routing Option\*  
☐ No Room Scheduling approval needed. Departmental Rooms used, all course drops, or request does not affect room assignment.  
☐ Adds/Changes where limits are 34 or less; requires University classroom. Pending final approval by Room Scheduling.  
☐ Room Scheduling approval needed. Form contains at least one add/change with limits of 35 or greater and utilizes a general university classroom.

Teaching Dept: AGRON

Semester/Year: S2013

Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
1. 493		01 09 2013 05 04 2013	var	999	999	Arranged	COM	Arranged
2.								
3.								
4.								
5.								
6.								
7.								
8.								

It would be nice to see more in the Kuali log. More than just semester/year. Have to click on each one to see what they are.

Comments

Course Number	Course Section	Change Type	From	To
1.				
2.				
3.				
4.				
5.				
6.				

Course Number	Course Section	Comment
1. 271	E	no enrollment
2.		
3.		
4.		
5.		
6.		

Reason for Change

test

Supporting Materials

Use the Create Note box below to attach supporting materials to your request. Notes may be added with or without attachments. Click the red 'save' button on the right.

Author	Date	Note	Action
GALVIN LINDA ANN	02/24/2012		save

View attachments

save approve disapprove return to previous Initiated

After approval action has been made, click on the X (close) on the “Edit document” **tab** at top of screen to close the window and return to workflow to complete other change requests.

Once approved or disapproved the ID and information is removed from the Action list.

If the request is disapproved, then the request will be sent back to the initiator. Changes cannot be made to the request. A new request will need to be submitted if applicable.

If the request needs to be sent back to the initiator, then select the “Back to Previous” button. If the request needs to go to someone other than the initiator, then select the arrow to the right of the Initiated button (see image below). This allows you to determine who needs to see the request and provide additional information.

If sending back to Room Scheduling choose wt48cocf.Roomscheduling1split from drop down menu.

Create Note		
Author	Date	Note
Christensen, Heidi	02/17/2021	<div> <div>Attach document</div> <div>No attachments found</div> </div> <div> <div>Initiated</div> <div>wt48.COCF.Deptchar</div> <div>wt48.COCF.Roomscheduling1Split</div> <div>wt48.COCF.Roomscheduling1RuleTemplatePreApprovedNode</div> </div>

save

approve

disapprove

return to previous

Initiated

After approved, disapproved or back to previous is clicked, the request goes to the Outbox. The items in the Outbox are what are Enroute and action must be taken by the next approver. The outbox shows what needs to be approved by others or is finalized.

Outbox

Workflow

action list

doc search

preferences

refresh

filter

NONE

apply default

delete selected items

Click on any of these and you can sort.

23 items retrieved, displaying 1 to 10. [First/Prev] 1, 2, 3 [Next/Last]

ID	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Last Approved Date	Group Request	Current Route Node(s)	Delete Item	Log
8051	Course Offering Change Form	Half Sheet - S2011 - test9	ENROUTE	FY1	HUGHES TODD A		09:53 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8053	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FY1	HUGHES TODD A		10:07 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8135	Course Offering Change Form	Half Sheet - S2011 - rr	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8808	wt48 COCF Sheet - Document Type	S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011		Registrars Office	Initiated	<input type="checkbox"/>	
8809	wt48 COCF Sheet - Document Type	S2011	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011		Registrars Office	Initiated	<input type="checkbox"/>	
8811	wt48 COCF Sheet - Document Type	S2011 - dfghdg	ENROUTE	APPROVE	HUGHES TODD A		01:55 PM 06/07/2011	01:05 PM 07/06/2011	Registrars Office	wt48.COCF.Roomscheduling2	<input type="checkbox"/>	

ID numbers

Click on these change preferences, refresh, add colors,

Click on ID number to view the **request**:

After the ID number is clicked on the screen below appears. Scroll down to see what the request is.

Viewing Document

Course Number	Course Section	Comment
1. 332	1	TEST- dropping for low enrollment
2.		
3.		
4.		
5.		
6.		

Drop

Reason for Change

TESTing a drop

Supporting Materials

Use the Create Note box below to attach supporting materials to your request. Notes may be added with or without attachments. Click the red 'save' button on the right.

Author	Date	Note	Action
			save

Author	Date	Note	Action
MCDONALD CAROL G	05/24/2011 11:23 AM	I changed ME 324A to meet 3 hours a day. It's enough time now. Please approve the form so it routes to Registrar's Office. It appears the "return to sender" option might be a really cool feature.	edit delete
THOMPSON JEAN M	05/24/2011 10:45 AM	Adding ME 324C is fine. Changing ME 324A does not have enough time (Just guessing) Please fix and resubmit.	edit delete

Unknown Zone (Mixed) 100%

Who has approved or disapproved

To view **the log** to determine request status:

Click on LOG icon in the OUTBOX- another new window will open:

Individual Info - Directory Inf... Workflow

ISU Alert  
ISU IDs  
Password Admin  
Preferences

action list doc search

Action List

preferences refresh filter

delete selected items

Action List | Outbox

9 items retrieved, displaying all items.

ID	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Delete Item	Log
8481	Course Offering Change Form	Half Sheet - Spring	ENROUTE	FY1	MCDONALD CAROL G		10:13 AM 05/24/2011	Registrar's Office	<input type="checkbox"/>	
8589	Course Offering Change Form	Half Sheet - 12011 - Com S	ENROUTE	FY1	MCDONALD CAROL G		10:00 AM 05/31/2011	Registrar's Office	<input type="checkbox"/>	
8590	Course Offering Change Form	Half Sheet - 12011 - Com S	ENROUTE	FY1	MCDONALD CAROL G		10:01 AM 05/31/2011	Registrar's Office	<input type="checkbox"/>	
8591	Course Offering Change Form	Half Sheet - 12011 - Com S	ENROUTE	FY1	MCDONALD CAROL G		10:02 AM 05/31/2011	Registrar's Office	<input type="checkbox"/>	
8595	Course Offering Change Form	Half Sheet - F2011 - mkt	ENROUTE	FY1	MCDONALD CAROL G		10:21 AM 05/31/2011	Registrar's Office	<input type="checkbox"/>	
8623	Course Offering Change Form	Half Sheet - S2011 - com s	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		04:49 PM 05/31/2011	Registrar's Office	<input type="checkbox"/>	
8658	Course Offering Change Form	Half Sheet - S2011 - r2d2	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		10:46 AM 06/02/2011	Registrar's Office	<input type="checkbox"/>	
8702	Course Offering Change Form	Half Sheet - S2011 - rrr	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		11:24 AM 06/02/2011	Registrar's Office	<input type="checkbox"/>	
10175	Course Offering Change Form	F2011 - AM IN - ADD	FINAL	APPROVE	BROWN VIRGINIA A		02:24 PM 08/10/2011	Registrar's Office	<input type="checkbox"/>	

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Done

Unknown Zone (Mixed) 100%

Outbox

Log icon

## Outbox Route Log



The screenshot displays the AccessPlus application interface. The top navigation bar includes links for Home, Student, Employee, Faculty/Adviser, and uBusiness. A left sidebar contains links for Emergency Contact, Favorites Admin, ISU Alert, ISU IDs, Password Admin, and Preferences. The main content area is titled 'Workflow' and shows the 'Route Log' for a specific workflow instance (ID: B481). The route log table lists actions taken, including 'COMPLETED', 'RETURNED TO PREVIOUS ROUTE LEVEL', 'FYI', and 'APPROVED', with details on who performed the action, when, and the annotation. A 'Pending Action Requests' section at the bottom shows a request for 'IN ACTION LIST APPROVE'.

ID:	B481			
<b>Title</b>	Half Sheet - Spring			
<b>Type</b>	Course Offering Change Form			
<b>Initiator</b>	MCDONALD CAROL G.	<b>Created</b>	10:13 AM 05/24/2011	
<b>Route Status</b>	ENROUTE	<b>Last Modified</b>	11:25 AM 05/24/2011	
<b>Node(s)</b>	vt45.COCP.Roomscheduling1	<b>Last Approved</b>		
		<b>Finalized</b>		

Actions Taken					
Action	Taken By	For Delegator	Time/Date	Annotation	
COMPLETED	MCDONALD CAROL G.		10:13 AM 05/24/2011	Document Routed from the AccessPlus / KW01/R201.COCP.jsp	
RETURNED TO PREVIOUS ROUTE LEVEL	THOMPSON JEAN H.		10:46 AM 05/24/2011		
FYI	HABEE MARCIA ANN.		10:48 AM 05/24/2011		
APPROVED	MCDONALD CAROL G.		11:25 AM 05/24/2011		


  

Pending Action Requests			
Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Room Scheduling	11:25 AM 05/24/2011	

When finished click on the X (close) on the “Edit document” **tab** at top of screen to close the window and return to workflow to complete other change requests or click on Action list on left side of page. The back arrow does not work.

The Outbox can be sorted by all of the features at the top of the form.

23 items retrieved, displaying 1 to 10. [First/Prev] 1, 2, 3 [Next/Last]

<u><b>ID</b></u>	<u><b>Type</b></u>	<u><b>Title</b></u>	<u><b>Route Status</b></u>	<u><b>Action Requested</b></u>	<u><b>Initiator</b></u>	<u><b>Delegator</b></u>	<u><b>Date Created</b></u>	<u><b>Last Approved Date</b></u>	<u><b>Group Request</b></u>	<u><b>Current Route Node(s)</b></u>	<u><b>Delete Item</b></u>	<u><b>Log</b></u>
<a href="#">8051</a>	Course Offering Change	Half Sheet - S2011	ENROUTE	FYI	<a href="#">HUGHES TODD A</a>		09:53 AM 06/01/2011		<a href="#">Registrars Office</a>	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	

## Making Kuali workflow individualized

Preferences: Preference can be set by each individual. For example – if notification by email is wanted, then select *Receive Primary Delegate Emails*.

The screenshot shows the 'Workflow Preferences' window in the ACCESSPLUS application. The window has a sidebar on the left with links: Emergency Contact, Favorites Admin, ISU Alert, ISU IDs, Password Admin, and Preferences. The main content area is titled 'Workflow Preferences' and contains several sections:

- General**: Includes fields for 'Automatic Refresh Rate' (set to 15), 'Action List Page Size' (set to 10), 'Email Notification' (set to Immediate), 'Receive Primary Delegate Emails' (checked), 'Receive Secondary Delegate Emails' (unchecked), 'Delegate Filter' (set to Secondary Delegates on Action List Page), and 'Primary Delegate Filter' (set to Primary Delegates on Action List Page).
- Fields Displayed In Action List**: A list of checkboxes for various fields: Document Type, Title, ActionRequested, Initiator, Delegator, Date Created, Date Approved, Current Route Node(s), WorkGroup Request, Document Route Status, and Application Document Status.

Click on preferences to add color to separate approved, disapproved and final forms in the outbox.

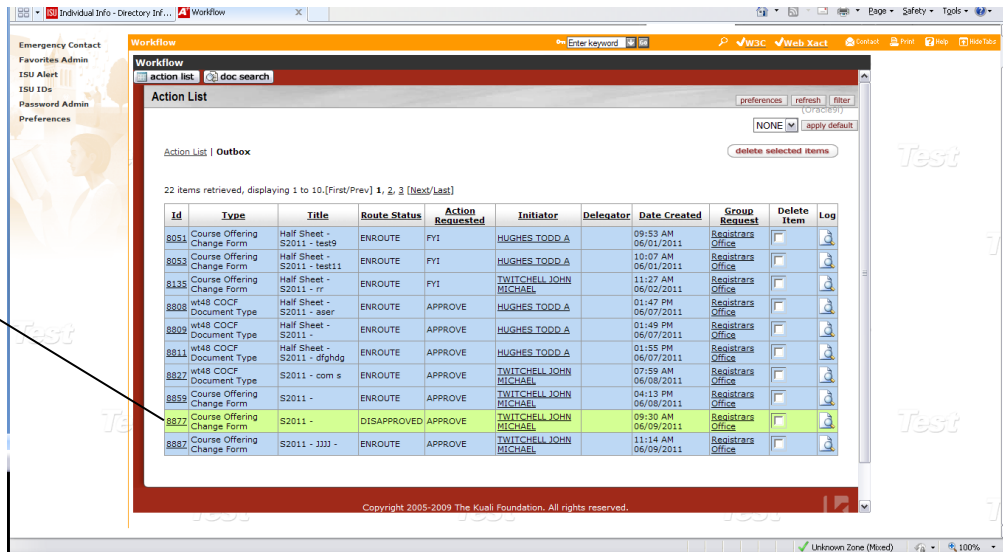
This screenshot shows the 'Document Route Status Colors for Actionlist Entries' section of the 'Workflow Preferences' window. It displays a table with 10 rows of status labels and a grid of color swatches for each:

Status	Color Swatches
Saved	Grid of 10 color swatches
Initiated	Grid of 10 color swatches
Disapproved	Grid of 10 color swatches
Enroute	Grid of 10 color swatches
Approved	Grid of 10 color swatches
Final	Grid of 10 color swatches
Processed	Grid of 10 color swatches
Exception	Grid of 10 color swatches
Canceled	Grid of 10 color swatches

Below the table are 'save', 'reset', and 'cancel' buttons. The footer of the window contains copyright information: 'Copyright 2005-2009 The Kuali Foundation. All rights reserved. Portions of Kuali are copyrighted by other parties as described in the Acknowledgments screen.'

## Example of request that was not approved:

Not approved



22 items retrieved, displaying 1 to 10. [First/Prev] 1, 2, 3 [Next/Last]

ID	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Delete Item	Log
8051	Course Offering Change Form	Half Sheet - S2011 - test9	ENROUTE	FVT	HUGHES TODD A		09:53 AM 06/01/2011	Registrars Office	<input type="checkbox"/>	
8053	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FVT	HUGHES TODD A		10:07 AM 06/01/2011	Registrars Office	<input type="checkbox"/>	
8135	Course Offering Change Form	Half Sheet - S2011 - r	ENROUTE	FVT	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011	Registrars Office	<input type="checkbox"/>	
8808	W48 COCF Document Type	Half Sheet - S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8809	W48 COCF Document Type	Half Sheet - S2011 -	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8811	W48 COCF Document Type	Half Sheet - S2011 - dfghd	ENROUTE	APPROVE	HUGHES TODD A		01:55 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8827	W48 COCF Document Type	S2011 - com s	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		07:59 AM 06/08/2011	Registrars Office	<input type="checkbox"/>	
8859	Course Offering Change Form	S2011 -	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		04:13 PM 06/08/2011	Registrars Office	<input type="checkbox"/>	
8877	Course Offering Change Form	S2011 -	DISAPPROVED	APPROVE	TWITCHELL JOHN MICHAEL		09:30 AM 06/09/2011	Registrars Office	<input type="checkbox"/>	
8887	Course Offering Change Form	S2011 - JJJ -	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		11:14 AM 06/09/2011	Registrars Office	<input type="checkbox"/>	

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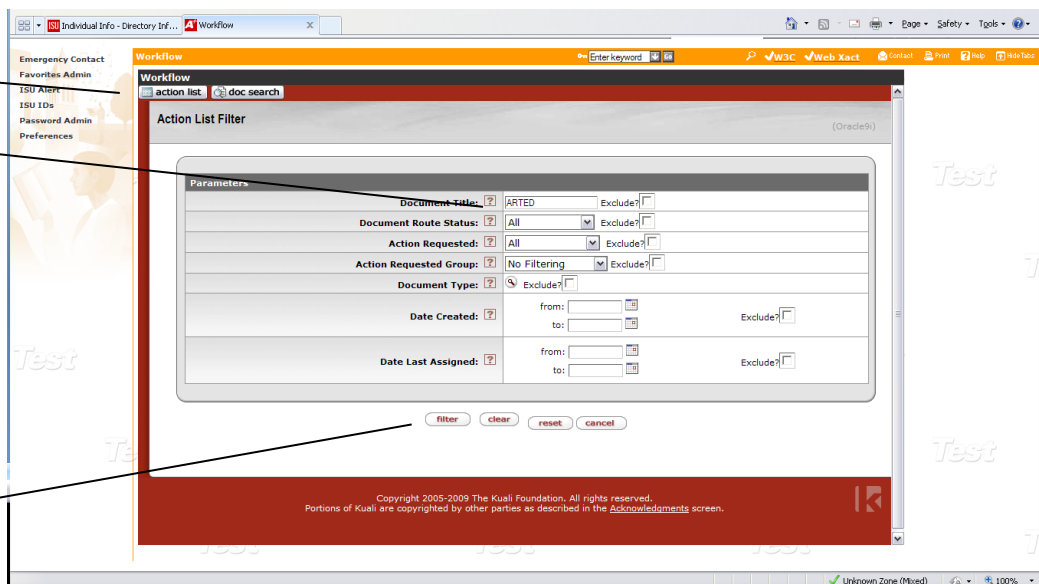
When finished press the X (close) on the “Edit document” **tab** at top of screen to close the window and return to workflow to complete other change requests or click on the action list on the left top of the screen.

**Filter:** find a certain form to see where it is ENROUTE to or specific documents such as All DROPS.

Action List

Document title = DEPT, Use exact ADIN department and all caps.

Press Filter



Parameters

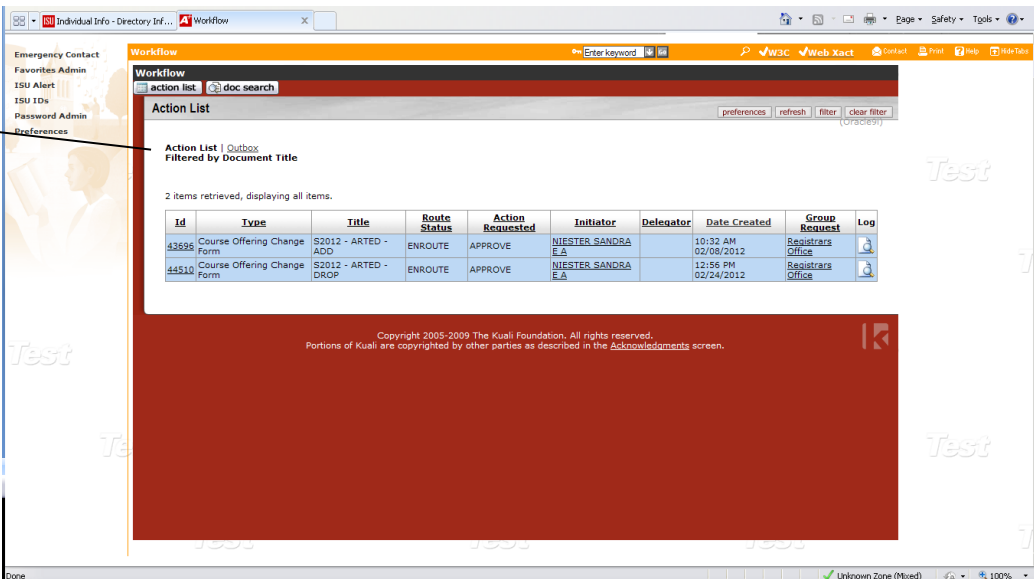
Document Title:	ARTED	Exclude?	<input type="checkbox"/>
Document Route Status:	All	Exclude?	<input type="checkbox"/>
Action Requested:	All	Exclude?	<input type="checkbox"/>
Action Requested Group:	No Filtering	Exclude?	<input type="checkbox"/>
Document Type:	S	Exclude?	<input type="checkbox"/>
Date Created:	from: <input type="text"/> to: <input type="text"/>	Exclude?	<input type="checkbox"/>
Date Last Assigned:	from: <input type="text"/> to: <input type="text"/>	Exclude?	<input type="checkbox"/>

filter clear reset cancel

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## Filtered Results:

Filtered action



Workflow

Workflow | [action list](#) | [doc search](#)

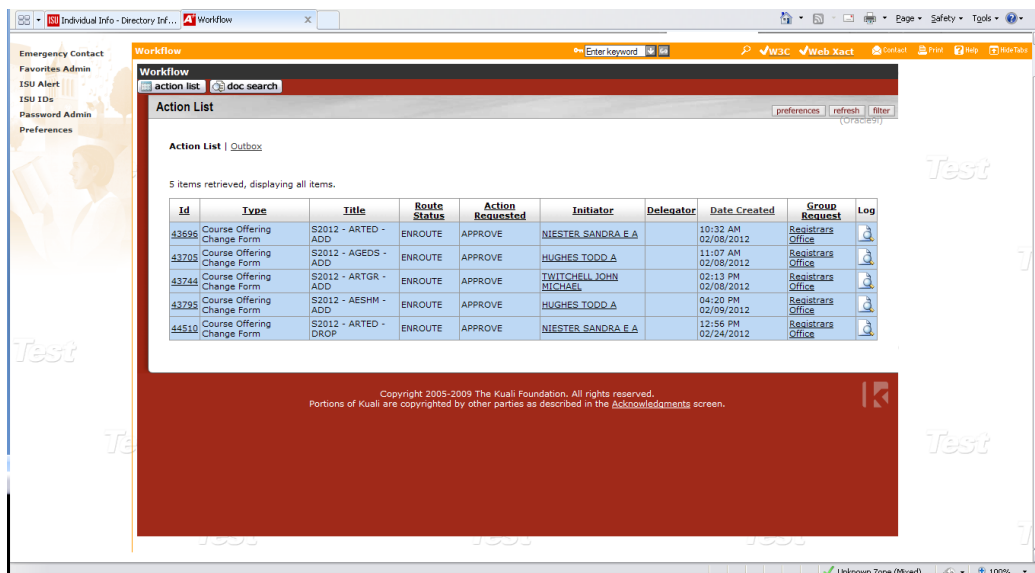
Action List | [Outbox](#)  
Filtered by Document Title

2 items retrieved, displaying all items.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
43696	Course Offering Change Form	S2012 - ARTED - ADD	ENROUTE	APPROVE	<a href="#">NIESTER SANDRA E.A</a>		10:32 AM 02/08/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>
44514	Course Offering Change Form	S2012 - ARTED - DROP	ENROUTE	APPROVE	<a href="#">NIESTER SANDRA E.A</a>		12:56 PM 02/24/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>

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Press Clear Filter to go back to all Action list requests.



Workflow

Workflow | [action list](#) | [doc search](#)

Action List | [Outbox](#)

5 items retrieved, displaying all items.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
43696	Course Offering Change Form	S2012 - ARTED - ADD	ENROUTE	APPROVE	<a href="#">NIESTER SANDRA E.A</a>		10:32 AM 02/08/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>
43709	Course Offering Change Form	S2012 - AGEDS - ADD	ENROUTE	APPROVE	<a href="#">HUGHES TODD A</a>		11:07 AM 02/08/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>
43744	Course Offering Change Form	S2012 - ARTGR - ADD	ENROUTE	APPROVE	<a href="#">TWITCHELL JOHN MICHAEL</a>		02:13 PM 02/08/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>
43793	Course Offering Change Form	S2012 - AESHM - ADD	ENROUTE	APPROVE	<a href="#">HUGHES TODD A</a>		04:20 PM 02/09/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>
44510	Course Offering Change Form	S2012 - ARTED - DROP	ENROUTE	APPROVE	<a href="#">NIESTER SANDRA E.A</a>		12:56 PM 02/24/2012	<a href="#">Registrars Office</a>	<a href="#">Log</a>

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## Document Search in either the Action list or the Outbox action list

Workflow

action list doc search

Outbox

preferences refresh filter (v1r1d191)

delete selected items

Action List | Outbox

23 items retrieved, displaying 1 to 10. [First/Prev] 1, 2, 3 [Next/Last]

ID	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Last Approved Date	Group Request	Current Route Node(s)	Delete Item	Log
8051	Course Offering Change Form	Half Sheet - S2011 - test9	ENROUTE	FY1	HUGHES TODD A		09:53 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8053	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FY1	HUGHES TODD A		10:07 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8135	Course Offering Change Form	Half Sheet - S2011 - rr	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	
8808	wt48 COCF Document Type	Half Sheet - S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011		Registrars Office	Initiated	<input type="checkbox"/>	
8809	wt48 COCF Document Type	Half Sheet - S2011 - dfghdg	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011		Registrars Office	Initiated	<input type="checkbox"/>	
8811	wt48 COCF Document Type	Half Sheet - S2011 - dfghdg	ENROUTE	APPROVE	HUGHES TODD A		01:55 PM 06/07/2011	01:05 PM 07/06/2011	Registrars Office	wt48.COCF.Roomscheduling2	<input type="checkbox"/>	
8823	wt48 COCF	S2011	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		07:59 AM 06/07/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	

Click on doc search and another new window will open.

Workflow

action list doc search

Outbox

Action List | Outbox

23 items retrieved, displaying 1 to 10. [First/Prev] 1, 2, 3 [Next/Last]

## Document look up window: Search

Workflow

action list doc search

Document Lookup

detailed search | superuser search | clear saved searches | Searches

\* required field

Supplemental Search Actions

Type:

Initiator:

Document/Notification Id:

Date Created From:

Date Created To:

Name this search (optional):

search clear cancel

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Within the Document Search functionality a request can be located quickly without manually searching through all of the change form requests.

Search by initiator netid- only used by administrator

Search by Date

Document Search

Document Type: \*COCF\*

Initiator:

Document Id:

Date Created From: 12/13/2012

Date Created To:

Name this search (optional):

search clear cancel

61 items retrieved, displaying all items.

Document Id	Document Type	Title	Status	Date Crea
<a href="#">135456</a>	Course Offering Change Form	S2013 - C E - DROP	FINAL	12/18/2012 09:2
<a href="#">135450</a>	Course Offering Change Form	12013 - BSE - CHANGE	ENROUTE	12/18/2012 08:5
<a href="#">135447</a>	Course Offering Change Form	S2013 - HORT - DROP	FINAL	12/18/2012 08:3
<a href="#">135441</a>	Course Offering Change Form	12013 - HORT - CHANGE	FINAL	12/17/2012 04:4
<a href="#">135422</a>	Course Offering Change Form	S2013 - C E - CHANGE	ENROUTE	12/17/2012 04:0
<a href="#">135419</a>	Course Offering Change Form	S2013 - AGEDS - ADD	FINAL	12/17/2012 03:4

If you have a set of criteria that you will use over and over, you can enter a name in the 'Name this search' field and save that search. Then you will be able to run it again later by selecting it from the 'Searches' dropdown at the top of the page.

Under Advanced look up there are several different ways to locate change forms and see what with status is.

When finished press the X at the top of the screen to close the view and return to the Action List/Outbox.

## Detailed Search capabilities

Click in detailed search

The screenshot shows the Iowa State University Workflow Document Search interface. The 'Workflow' header has tabs for 'action list' and 'doc search'. The 'Document Search' section has a 'detailed search' tab selected. The search form includes fields for Document Type, Initiator, Document Id, Date Created From, Date Created To, and Name this search (optional). A 'search' button is at the bottom.

There are two types of document searches available in workflow. The first is a basic search and is the default when selecting “doc search” from the tool bar. At the top of the form there is also an option for a detail search. The detail search contains the same components as the basic search, plus the ability to search on additional fields in the workflow document. Keep in mind that the system will look at all the criteria requested and will find the resulting documents where **all** of the requested criteria are true.

This document search product has the ability to use a **wildcard** symbol (\*) in place of one or more characters in text fields. This will allow the user to quickly enter information and have the retrieved items returned for viewing. When using the wildcard, all of the characters in the string must be represented.

Example: administrator search – detailed search: Title area.

*ART*	Will return records that have ART somewhere in the text string. Any characters can precede or follow the ART.
*COCF*	Will return records that have COCF somewhere in the text string. Any characters can precede or follow the COCF.

Information regarding specific fields:

**Document ID:** If the document ID is known, only this piece of information is needed to complete the search. The document ID number is unique and can’t be duplicated.

**Date fields:** Created From/To, Approved From/To, Last Modified From/To, Finalized From/To are all date fields and wildcards cannot be used. The more criteria entered under the dates, the tighter the search results become. Keep in mind that the system reads down through criteria and finds that document.

**Title:** The Course Offering change form has a formatted title that can also be included in the search. The standard layout of the title field is *term – dept – first request type*.

Title Example

Select Search

Results

Date Last Modified To:

Date Finalized From:

Date Finalized To:

Title:

Name this search (optional):

85 items retrieved, displaying all items.

Document Id	Document Type	Title	Status	Date Created	Route Log
<a href="#">134631</a>	Course Offering Change Form	12013 - ARTIS - ADD	ENROUTE	12/12/2012 01:37 PM	
<a href="#">134343</a>	Course Offering Change Form	S2013 - ARTGR - CHANGE	ENROUTE	12/11/2012 02:39 PM	
<a href="#">133518</a>	Course Offering Change Form	S2013 - ARTIS - CHANGE	FINAL	12/05/2012 04:13 PM	
<a href="#">133237</a>	Course Offering Change Form	S2013 - ART - DROP	FINAL	12/04/2012 03:06 PM	
<a href="#">133233</a>	Course Offering Change Form	S2013 - ART - DROP	FINAL	12/04/2012 02:29 PM	
<a href="#">132404</a>	Course Offering Change Form	S2013 - ARTIS - CHANGE	FINAL	11/29/2012 02:18 PM	
<a href="#">129466</a>	Course Offering Change Form	S2013 - ARTGR - DROP	ENROUTE	11/14/2012 02:39 PM	
<a href="#">127281</a>	Course Offering Change Form	S2013 - ARTIS - CHANGE	FINAL	11/07/2012 11:59 AM	
<a href="#">126019</a>	Course Offering Change Form	S2013 - ART H - CHANGE	FINAL	11/02/2012 03:18 PM	
<a href="#">126018</a>	Course Offering Change Form	S2013 - ARTED - ADD	FINAL	11/02/2012 03:15 PM	
<a href="#">125373</a>	Course Offering Change Form	S2013 - ARTIS - CHANGE	FINAL	11/01/2012 10:06 AM	
<a href="#">124918</a>	Course Offering Change Form	S2013 - ARTIS - DROP	FINAL	10/31/2012 10:41 AM	

\*F\*=Fall, \*S\*=Spring, \*12020\*=Summer and year in the title area. Otherwise it will give you anything with a 1 in the title. Or \*F2020\*= Fall 2020, \*S2020\*=Spring 2020

Course offering information instructions: <http://www.registrar.iastate.edu/courses/offeringinfo.shtml>

Detailed search :

Workflow

Enter keyword

Workflow

Document Search ?

Searches

\* required field

In Title area: term/year (S2020) – (department)\*

Date Finalized From:

Date Finalized To:

Title:

Name this search (optional):

10 items retrieved, displaying all items.

Document Id	Document Type	Title	Status	Date Created	Route
<a href="#">1791422</a>	Course Offering Change Form	S2020 - A B E - CHANGE	FINAL	10/22/2019 11:36 AM	
<a href="#">1791405</a>	Course Offering Change Form	S2020 - A B E - ADD/CHANGE	ENROUTE	10/22/2019 11:13 AM	
<a href="#">1789823</a>	Course Offering Change Form	S2020 - A B E - CHANGE	FINAL	10/14/2019 01:31 PM	