Iowa State University

Course Offering Change Form Instructions

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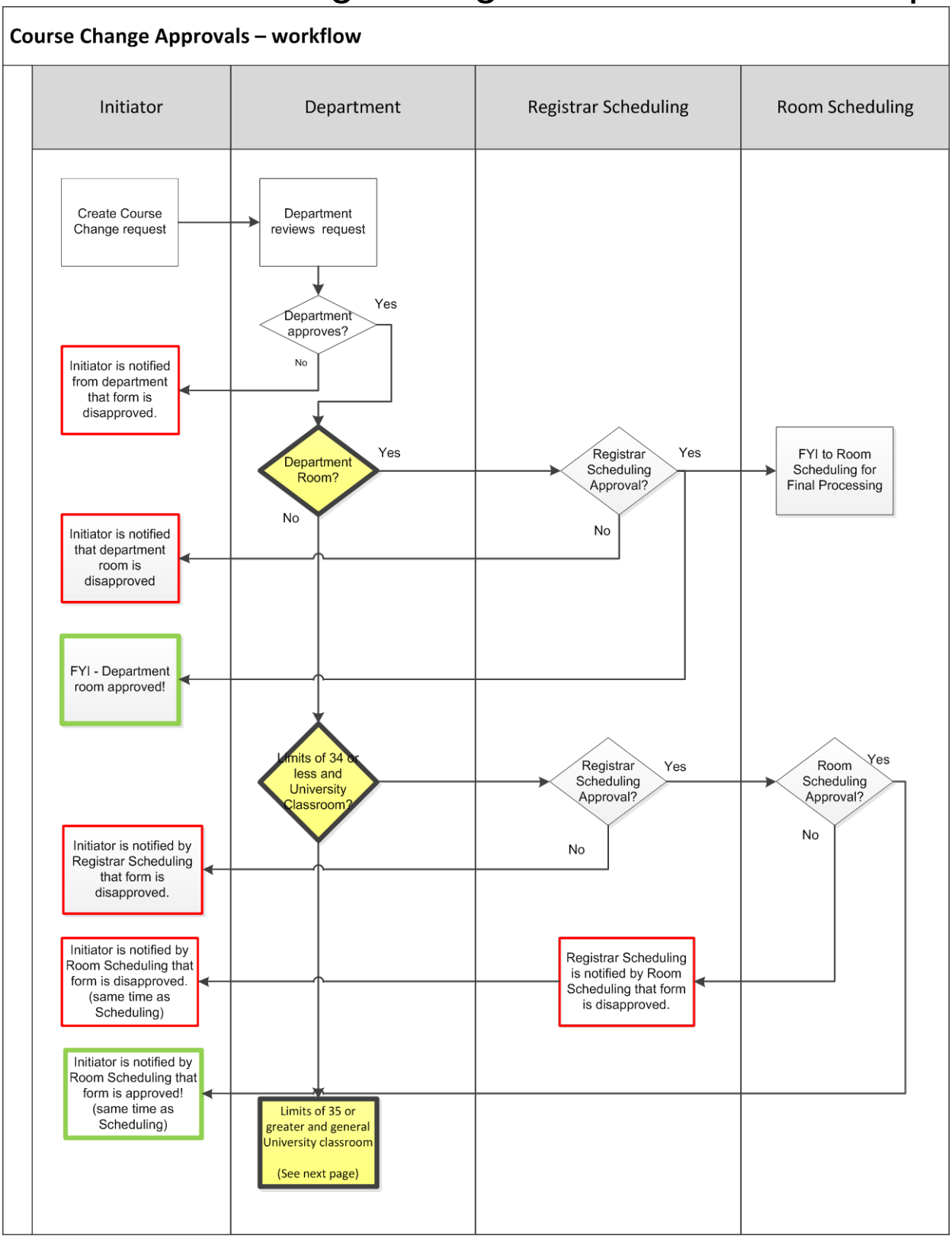
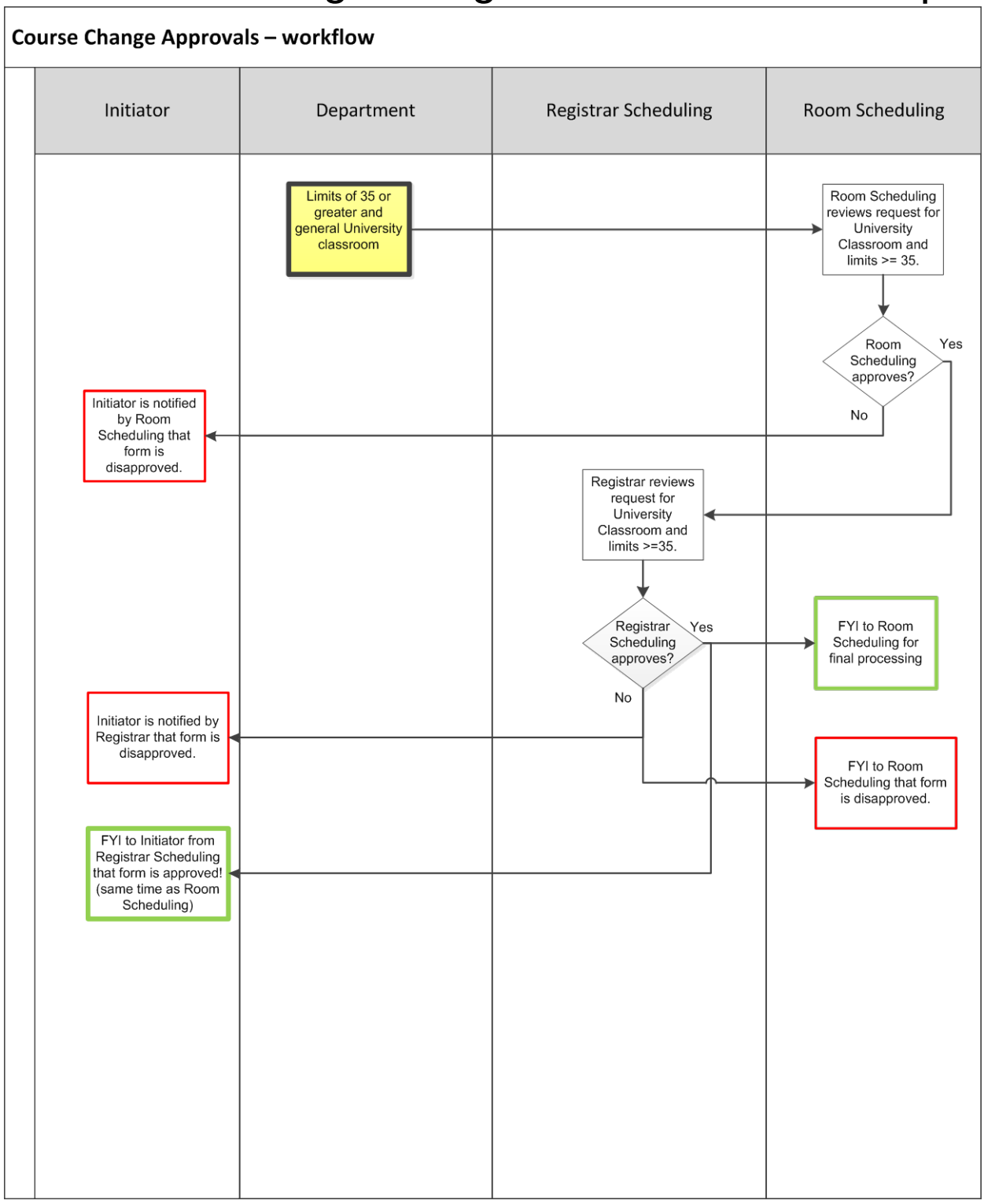
Course Offering Change form Workflow Graph

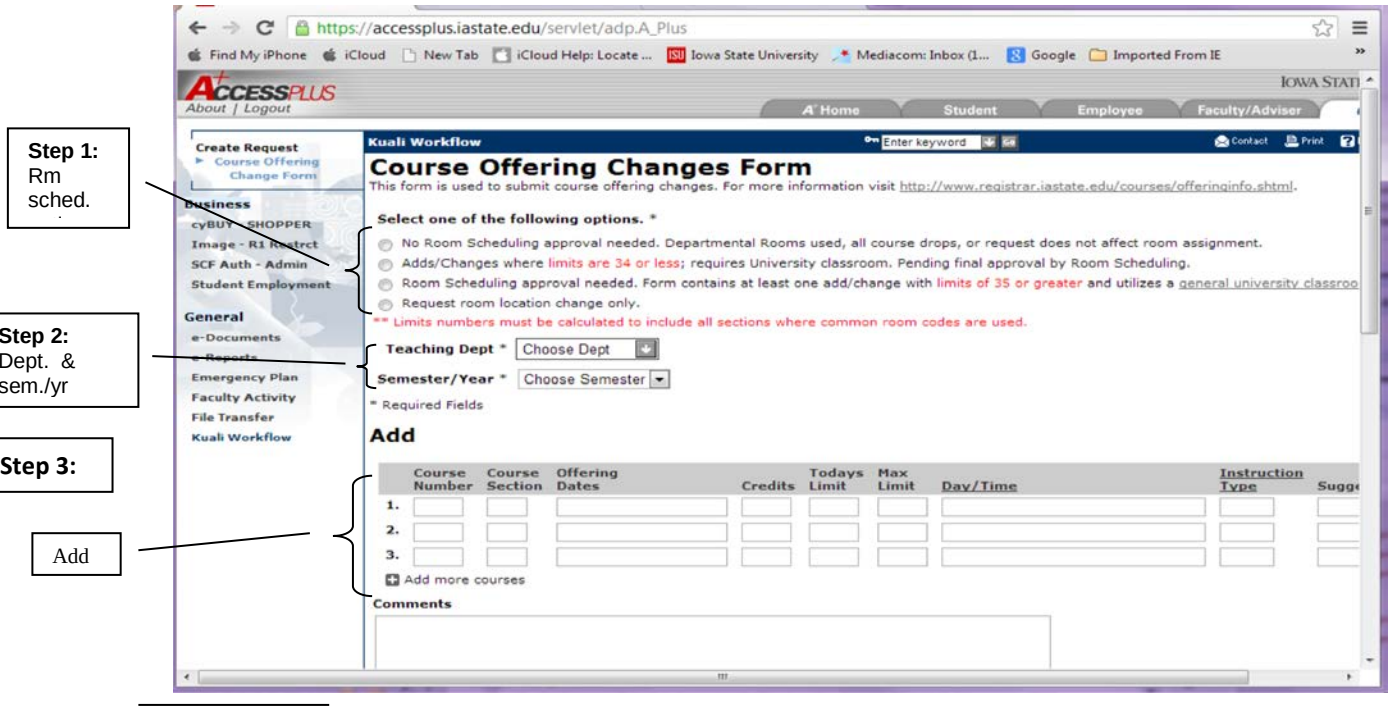


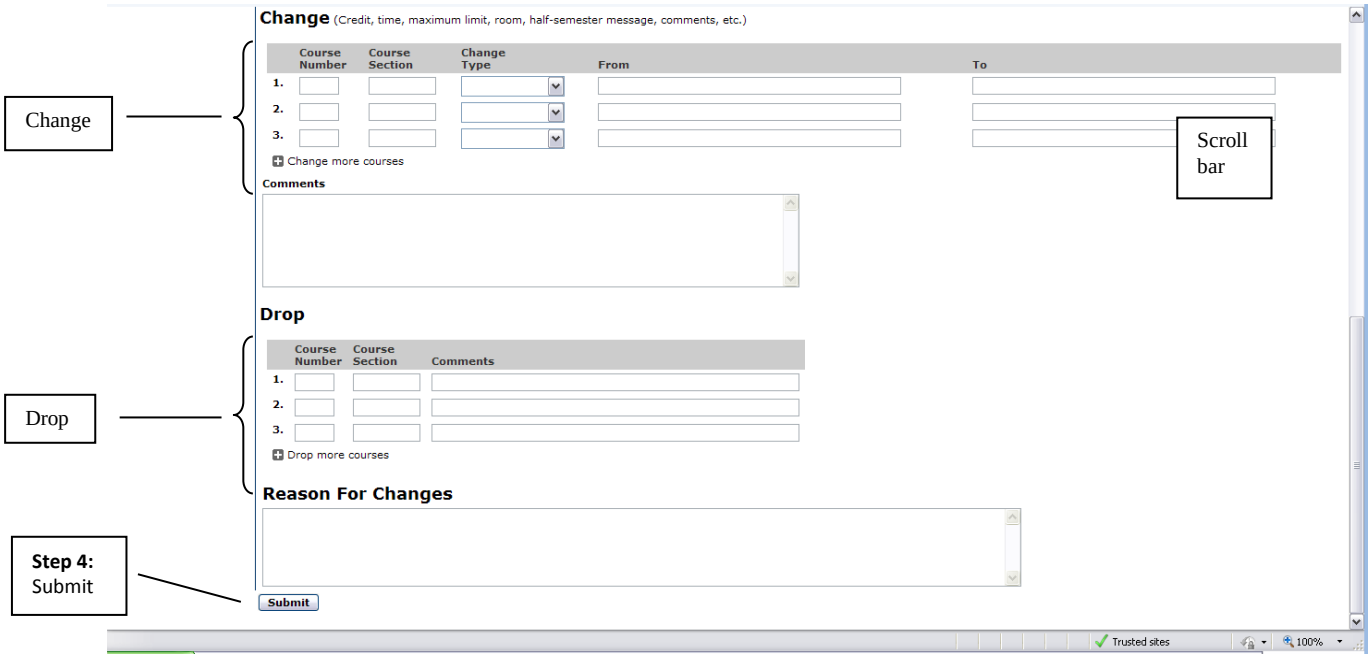
Course Offering Change form Workflow Graph



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 for to activate a new request





If requesting a change of time and we must create a new section, please be sure to add the instructor to the new section and inform them they may need to update the Blackboard also.

How to make request and fill out this form:

Initiator Directions:
Step 1: Select Room Scheduling options

Select one of the following options. *

- 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 change only.

** Limits numbers must be calculated to include all sections where common room codes are used.

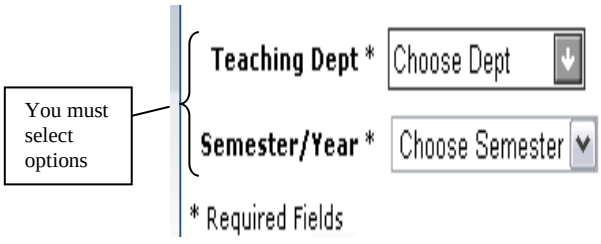
When Room Scheduling is not required, select the first option. The course form will be routed as follows for approval from the Initiator to the Department Head and Student Scheduling. After final approval by Student Scheduling a copy is routed to Room Scheduling to enter any changed room information. When completed by Room Scheduling, a notice is sent to the Initiator that the process is completed. At any point in the workflow the form can be disapproved or returned to a specific level requesting an additional change or information.

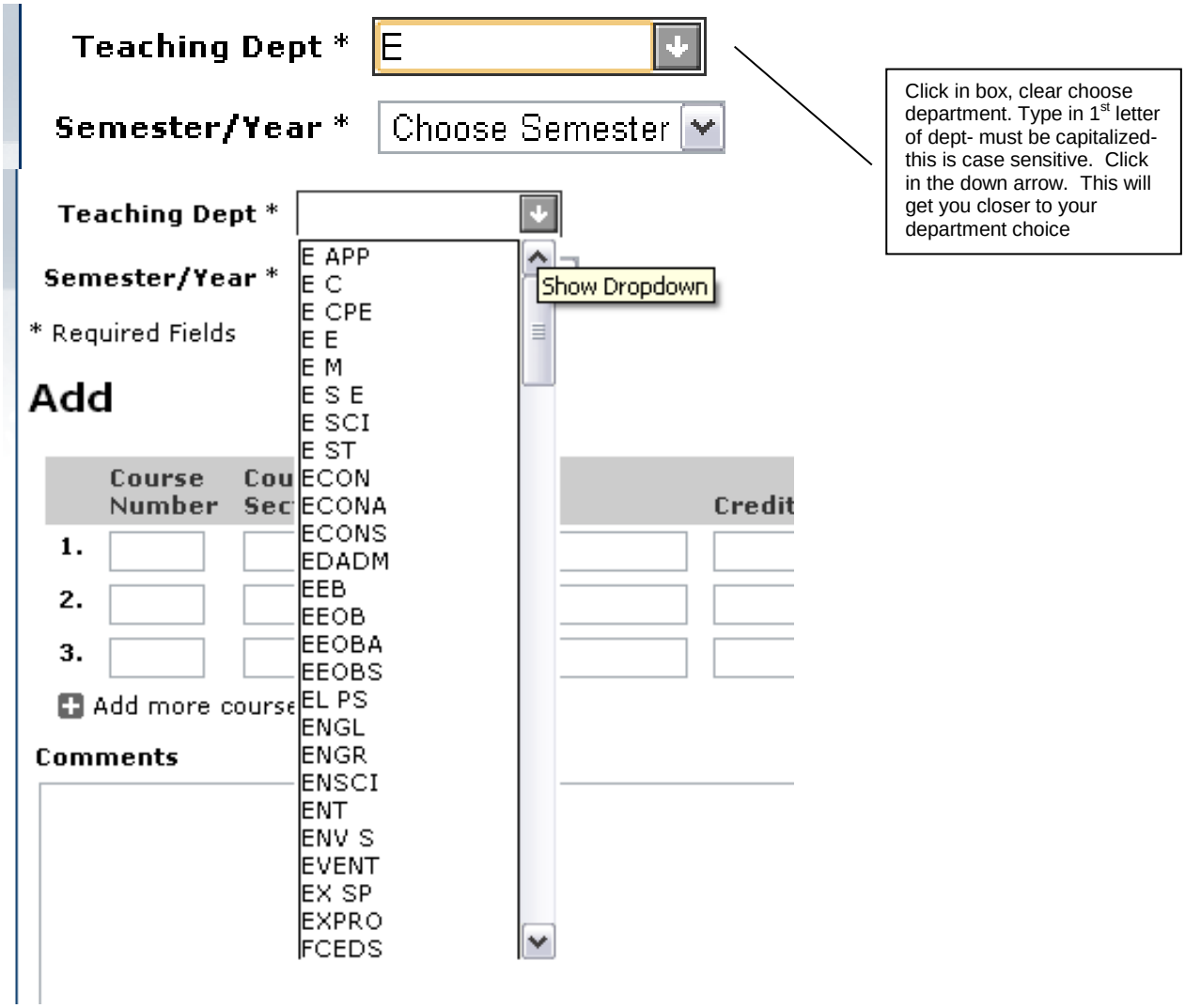
The second and third options are used any time a course change involves the use of a university room. Adds or changes that involved limits less than or equal to 34 are routed first through Student Scheduling, for early course offering setup in ADIN, and are then finalized by Room Scheduling. Adds and changes effecting rooms larger than 34 are routed first through Room Scheduling for approval and then through Student Scheduling for setup. As with the first option, at any point in the workflow, the form can be disapproved or returned to a specific level requesting an additional change or information.

The fourth option is only if all you are wanting to do is change the room location.

Do not mix change requests that require different routing on the same form. Forms that request the incorrect Room Scheduling options will be disapproved and returned to the initiator.

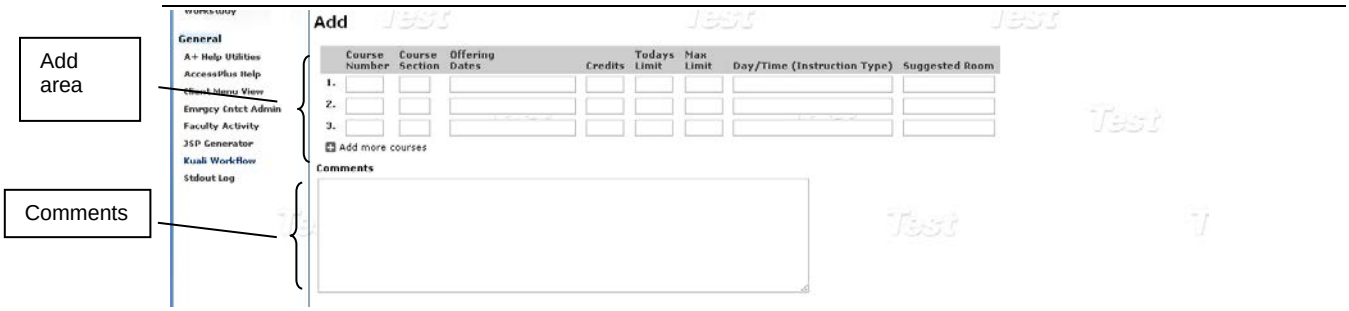
Step 2: Next select Department and Semester.



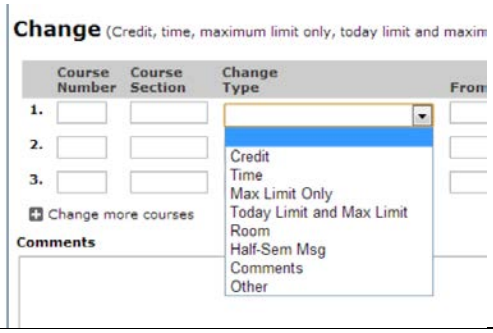


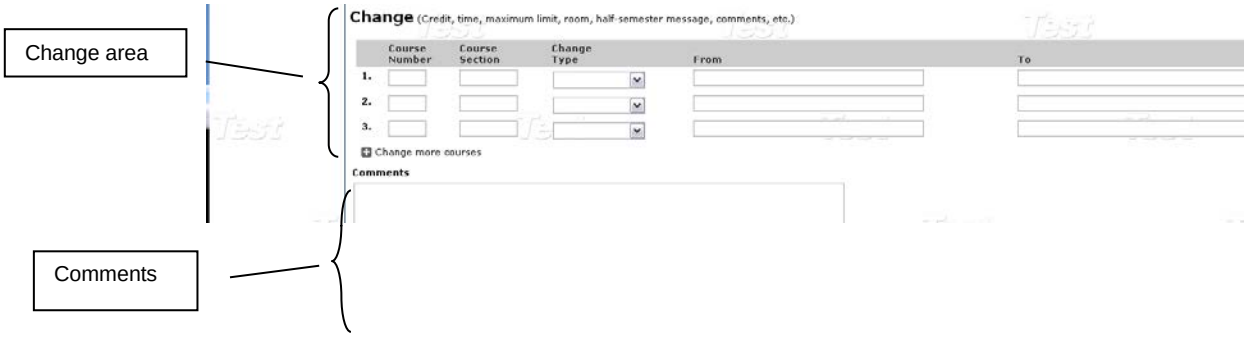
Only **one teaching department and term may be select for each form**. Change requests that involve a cross listed course should always be processed by the **major teaching department**. The cross listed departments must be noted in the comments sections.

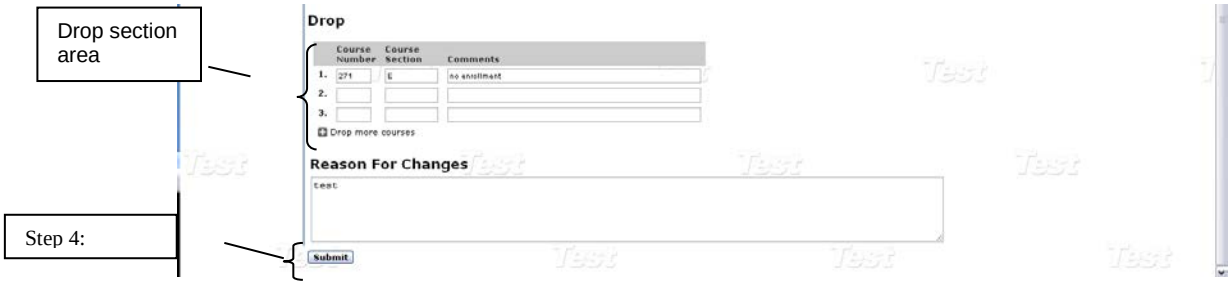
Step 3: Choose to Add, Change or Drop courses. Please be sure that all requests made on this form are complete or the form will be returned requesting additional information. Use the comment box in each area to supply additional information that may be needed when processing the form. Addition rows are available in each are to accommodate 8 adds 6 changes and 6 drops.



Change area options;







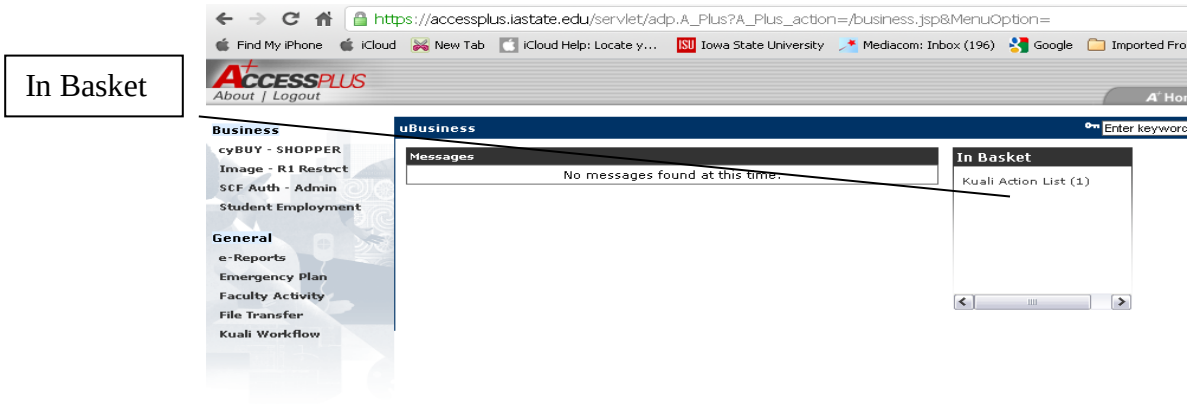
Step 4: Click **Submit** at the bottom of the screen after the form has been filled out. A copy of the submitted form will automatically appear in the Kuali Outbox of the Initiator. If the request is disapproved, the Initiator will get the form back and have to start over. If at any point the form is returned to previous level the approver can choose how far back the change request must go to get the changes or information needed.

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.

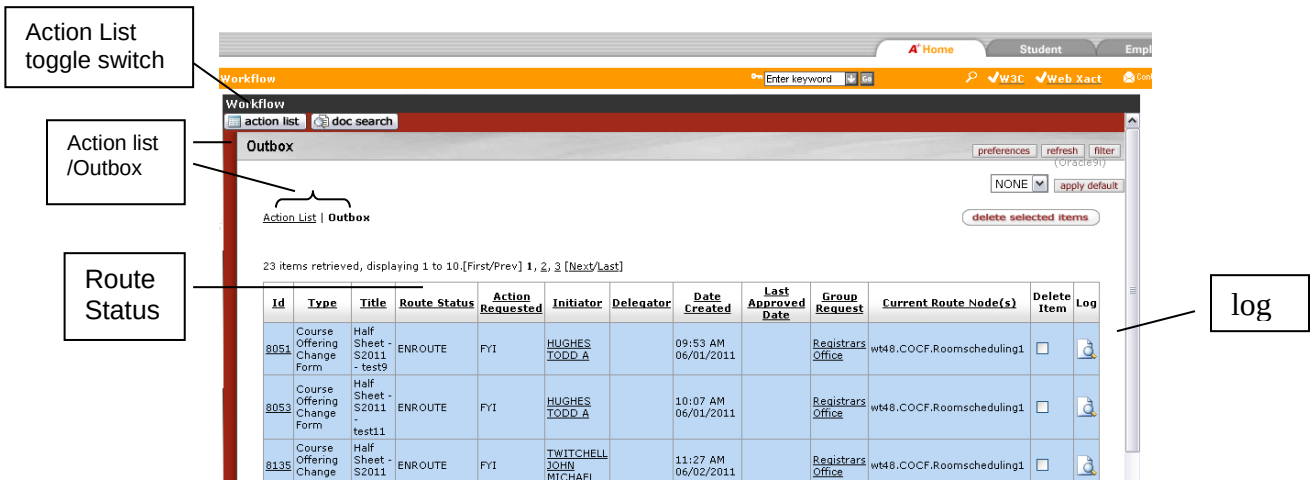
If at any time the request is disapproved or returned to previous it will go back to the Initiator. Department Head, Room Scheduling and Registrar Office form:

In Basket- Located under UBusiness tab first page or A+ Home page. Click on Kuali Action list to go to action list/outbox. If you don't want to re-type your password just click on the A+ tab and back to UBusiness tab.

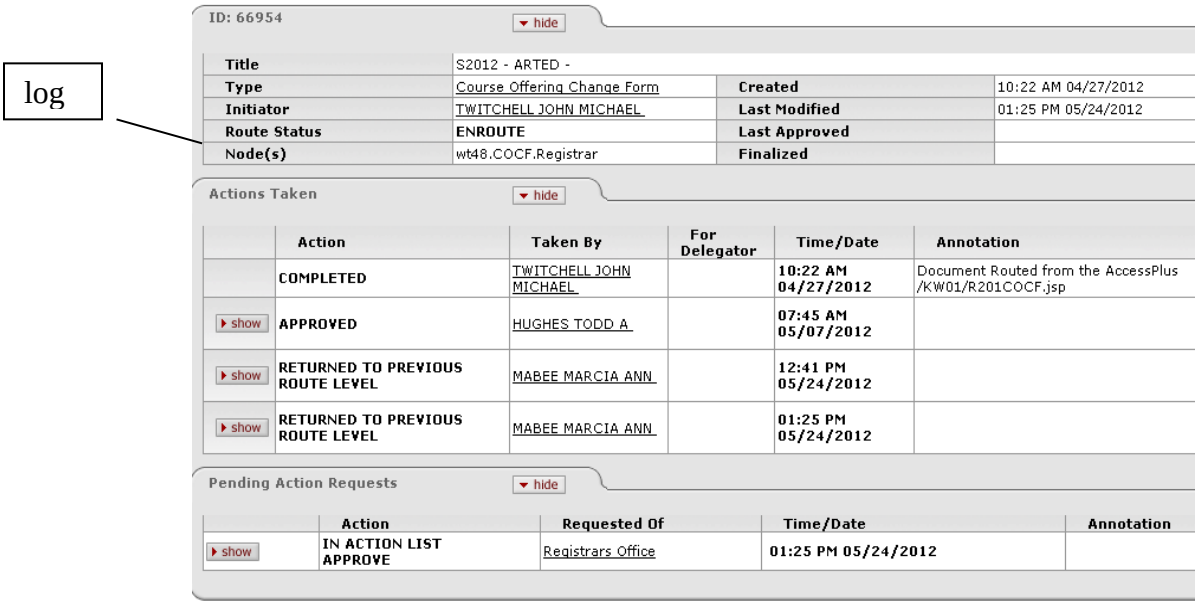


After clicking on Kuali action list the Action list shows first then click on the outbox option

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:

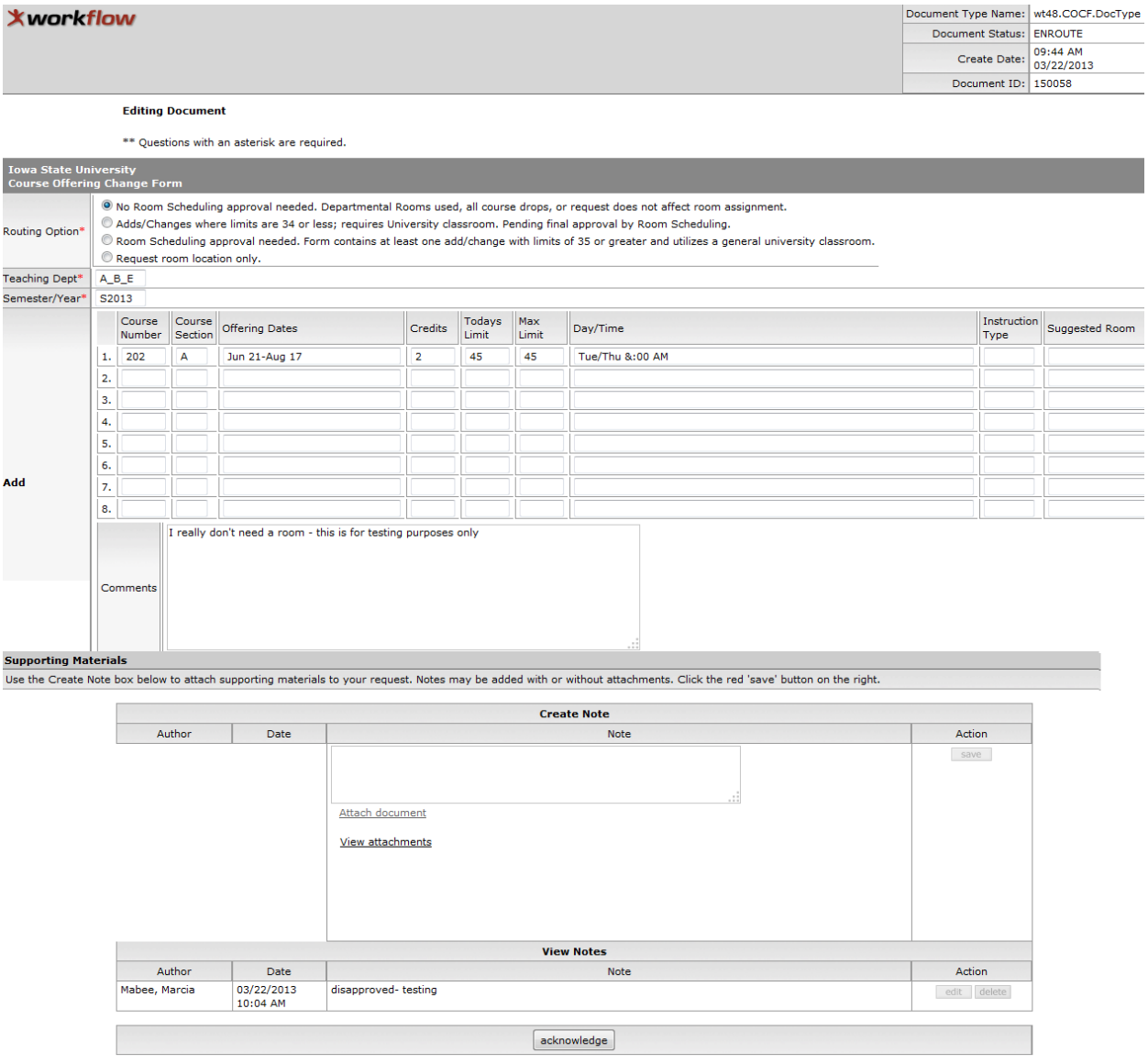
If there is something in the Action List action must be taken to complete the process. There are 3 possibilities:

Approved:

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.

Disapproved:

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



workflow

Document Type Name:	wt48.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*: S2013

Add

	Course Number	Course Section	Offering Dates	Credits	Todays Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
1.	202	A	Jun 21-Aug 17	2	45	45	Tue/Thu &: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
			save

Attach document

View attachments

View Notes

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

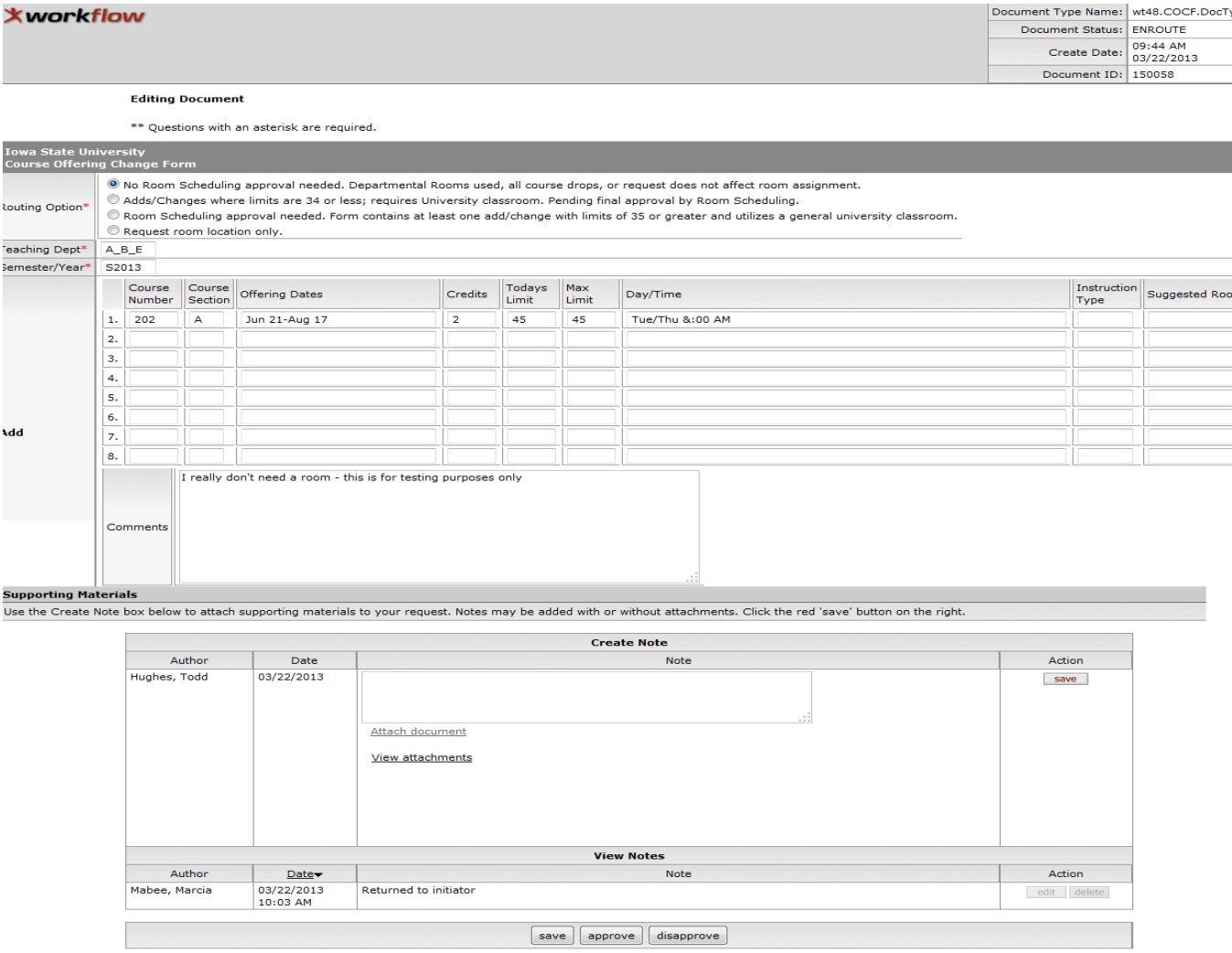
acknowledge

Returned to initiator: Problem with request

Initiator must take action if a request is returned. Initiator must open request by clicking on the ID#.

Approve: to re-send – with changes made. When you make the changes the changes must be saved before approving

Disapprove: If need to just start over.



Department head, Room Scheduling or Registrar Office

Notification of Action Pending from the Solution Center is sent via e-mail:

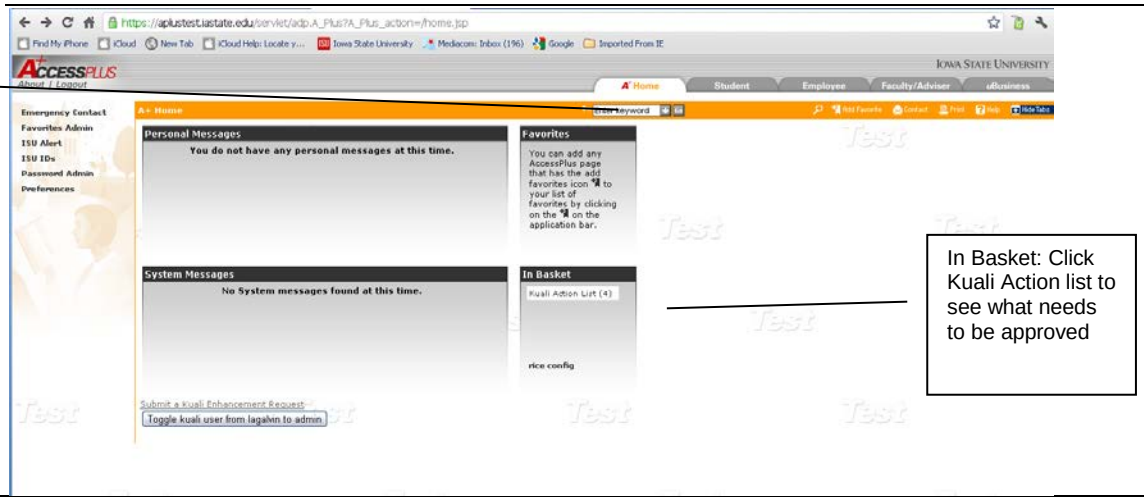
From: solution@iastate.edu [mailto:solution@iastate.edu]
Sent: Friday, June 08, 2012 2:24 PM
To: marmabee@iastate.edu
Subject: Action List Reminder

Your Action List has an eDoc(electronic document) that needs your attention.
Your Action List is located on the Home tab of Accessplus.

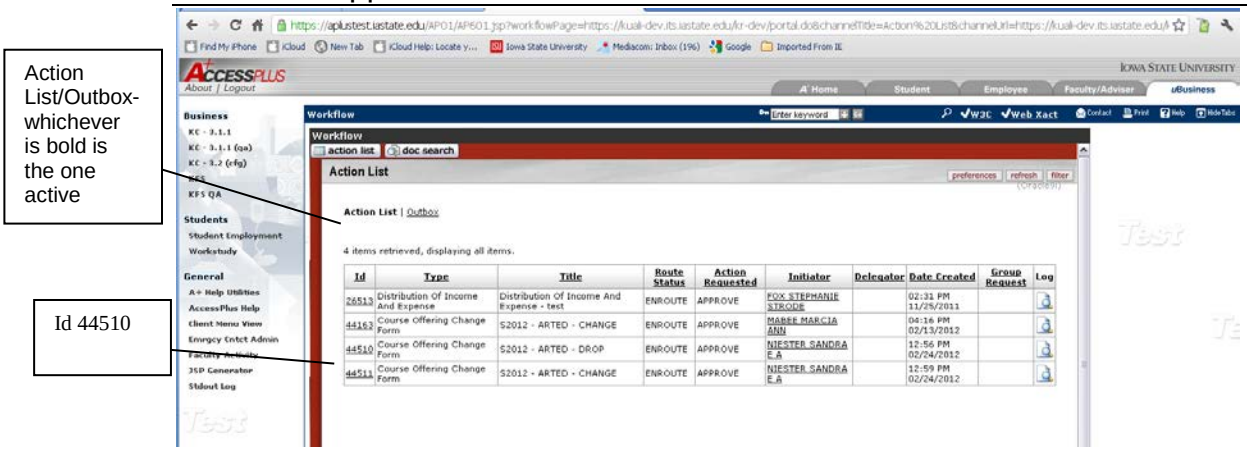
Document ID: 79913
Initiator: THORLAND-OSTER VICKY
Type: Add/Modify wt48.COCF.DocType
Title: F2012 - E E - DROP/CHANGE

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

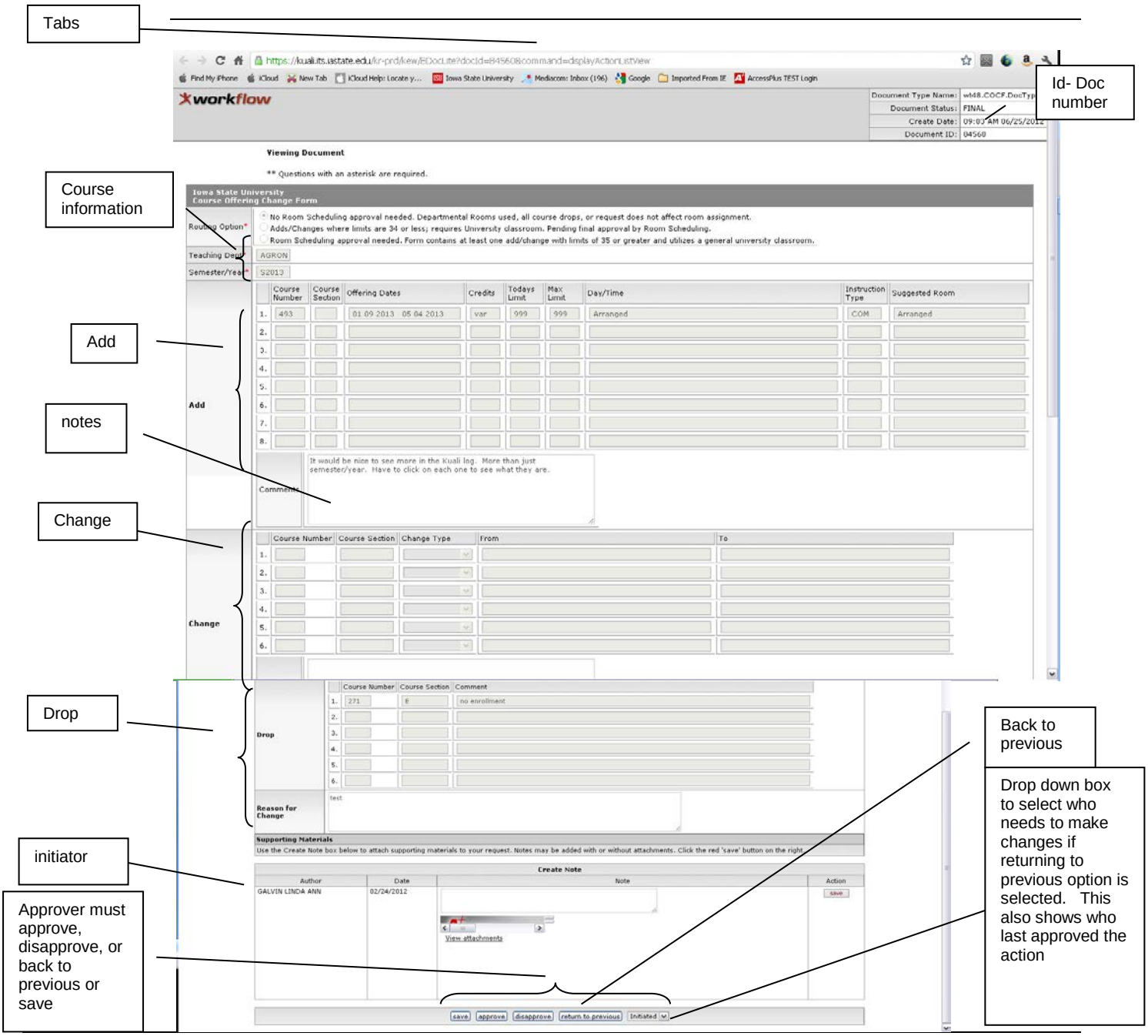


List of what needs to be approved:



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

Department Head, Room Scheduling and Registrar Office Approval form:



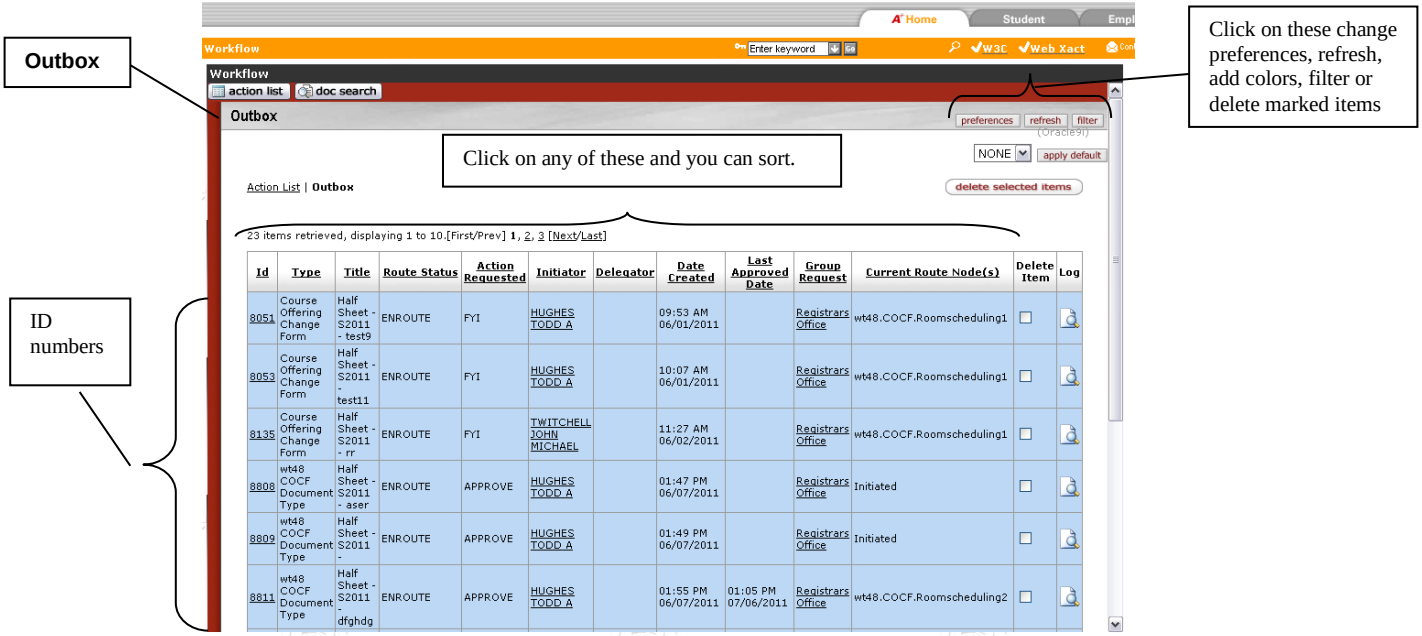
After approval action has been made, click on the X (close) on the “Edit document” **tab** at top of screen to close the window and return to workflow to complete other change requests.

Once approved or disapproved the ID and information is removed from the Action list.
If the request is disapproved or return to previous, the request will be sent back to the Initiator. Changes cannot be made if the request is disapproved. If “back to previous” is chosen.

“Back to previous” allows changes to be made without starting the original form over, Disapproved forms will require that the Initiator will need to create a new form with new

information if a different change can be negotiated. If sending back to Room Scheduling choose wt48cocf.Roomscheduling1split from drop down menu.

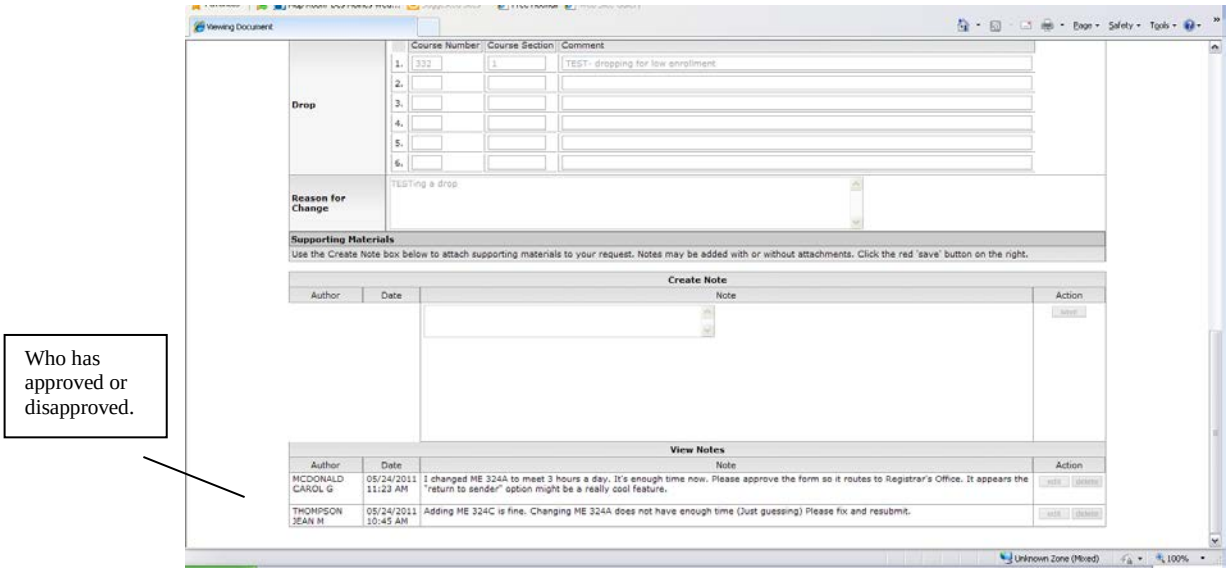
After approved, disapproved or back to previous is clicked, the request goes to the Outbox. The items in the Outbox are what are Enroute and action must been taken by the next approver. The outbox shows what needs to be approved by others or is finalized.



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	FYI	HUGHES TODD A		09:53 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1		
8053	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FYI	HUGHES TODD A		10:07 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1		
8135	Course Offering Change Form	Half Sheet - S2011 - rr	ENROUTE	FYI	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011		Registrars Office	wt48.COCF.Roomscheduling1		
8808	wt48 COCF Document Type	Half Sheet - S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011		Registrars Office	Initiated		
8809	wt48 COCF Document Type	Half Sheet - S2011 -	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011		Registrars Office	Initiated		
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		

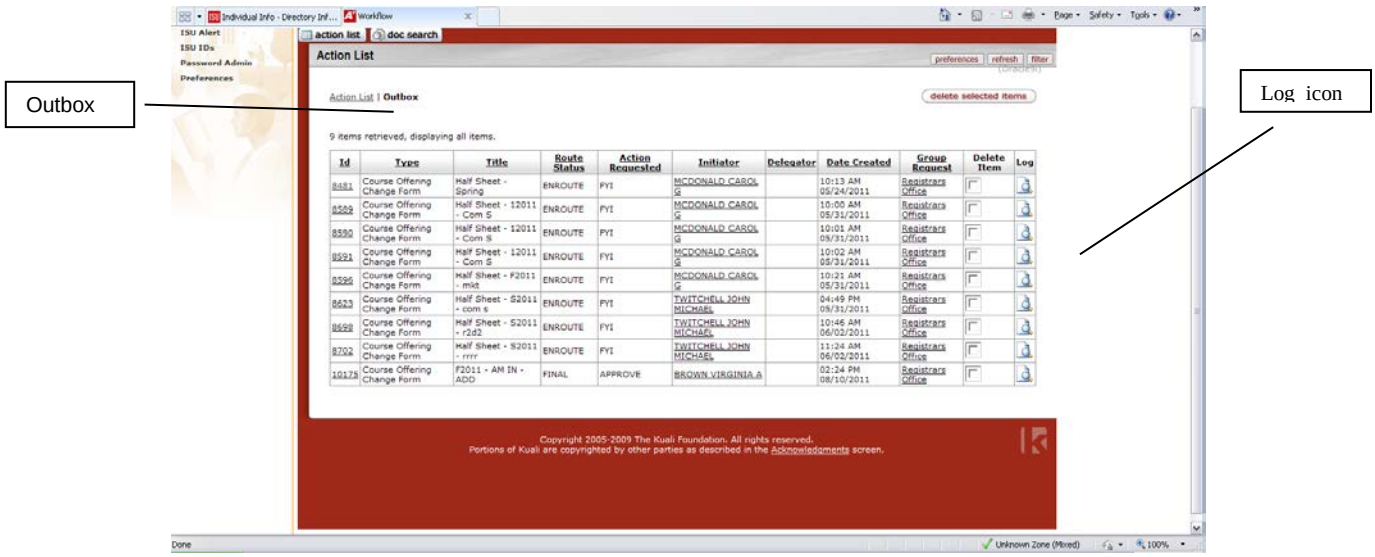
Click on ID number to view the **request**:

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

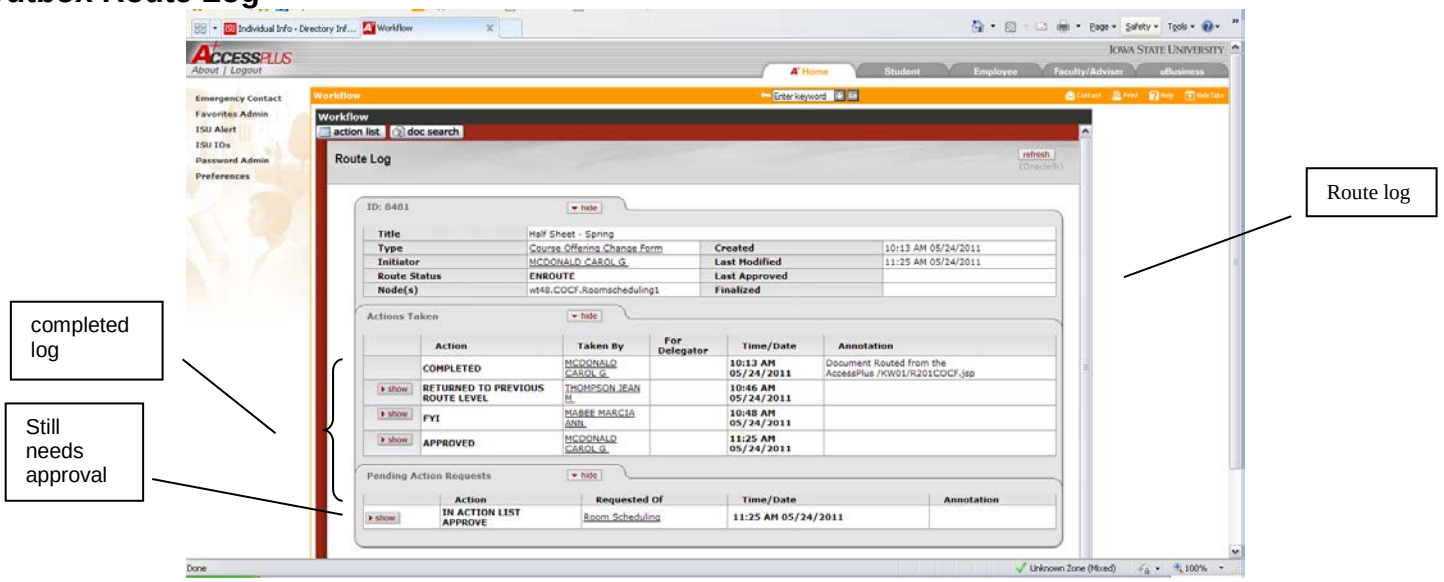


To view **the log** to determine request status:

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

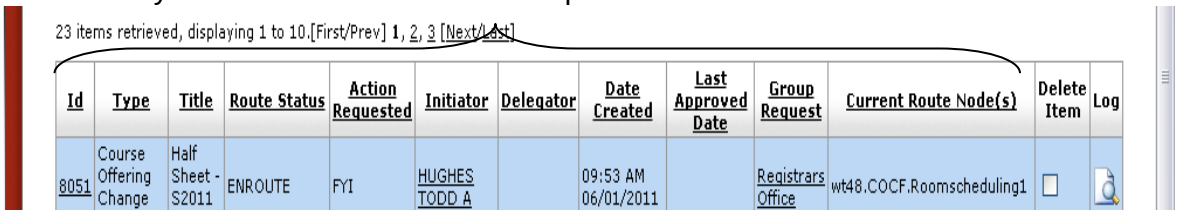


Outbox Route Log



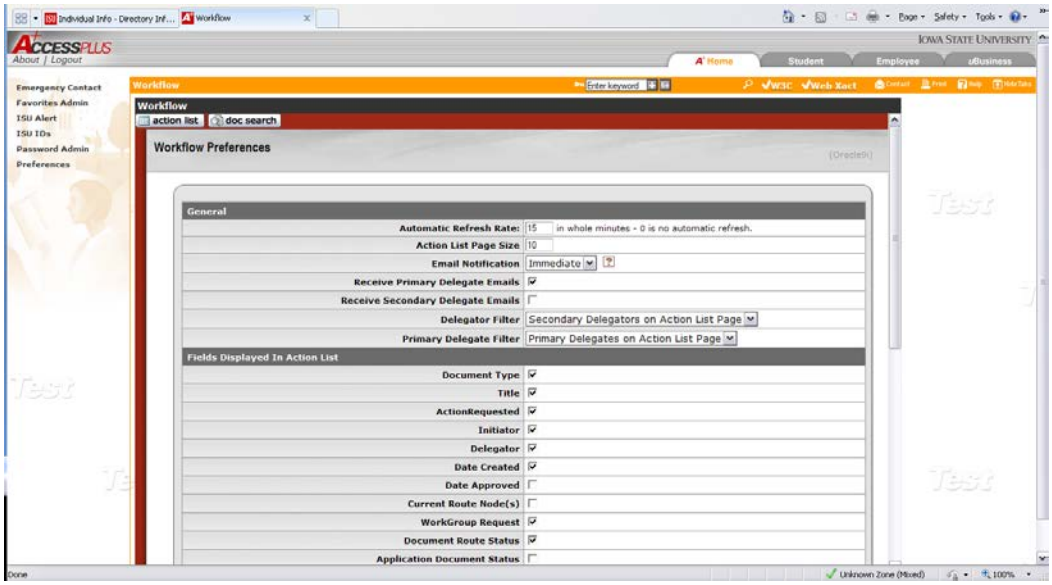
When finished click on the X (close) on the "Edit document" **tab** at top of screen to close the window and return to workflow to complete other change requests or click on Action list on left side of page.. The back arrow does not work.

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

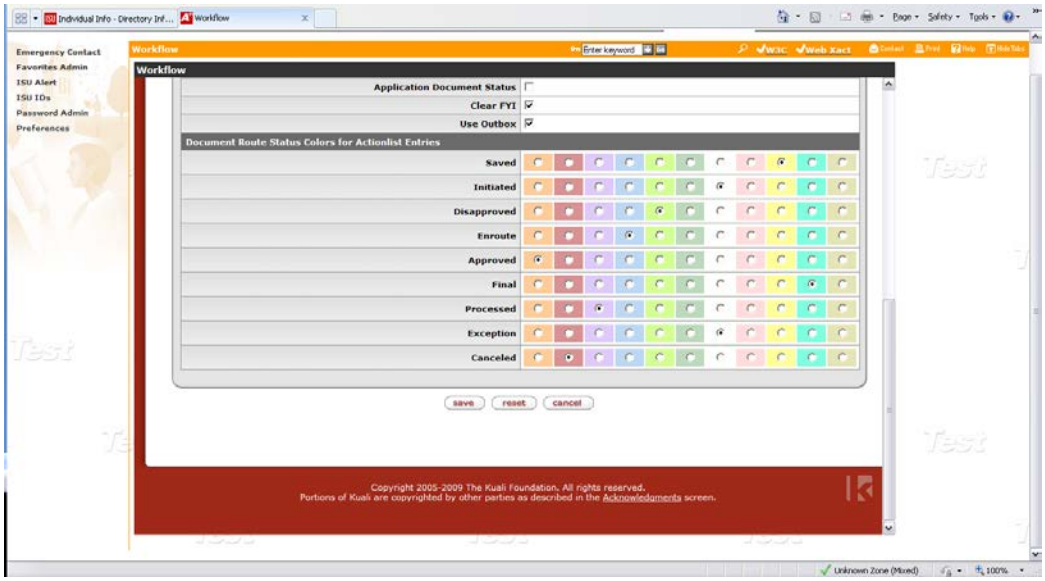


Making Kuali workflow individualized

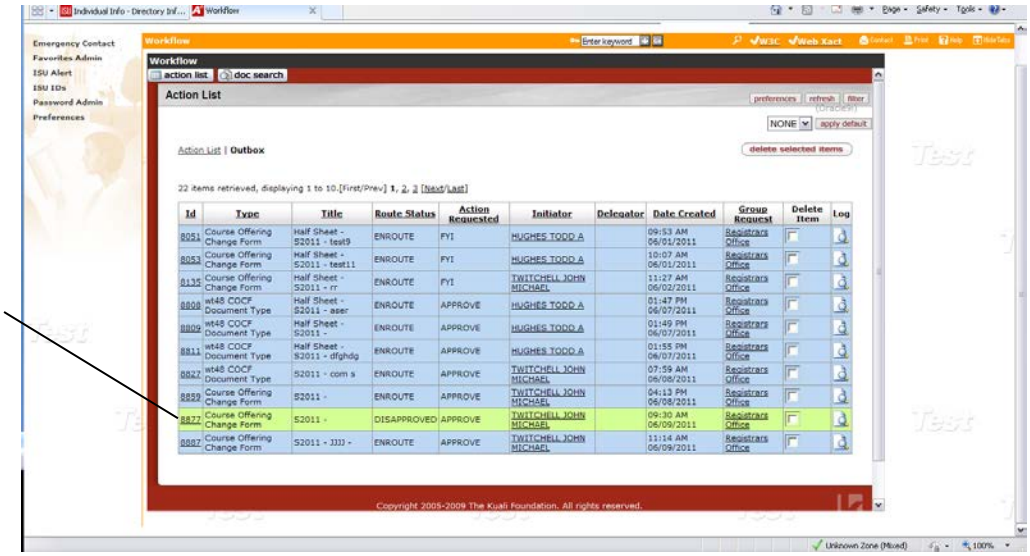
Preferences: Preference can be set by each individual. For example – if notification by email is wanted checkmark Receive primary emails



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

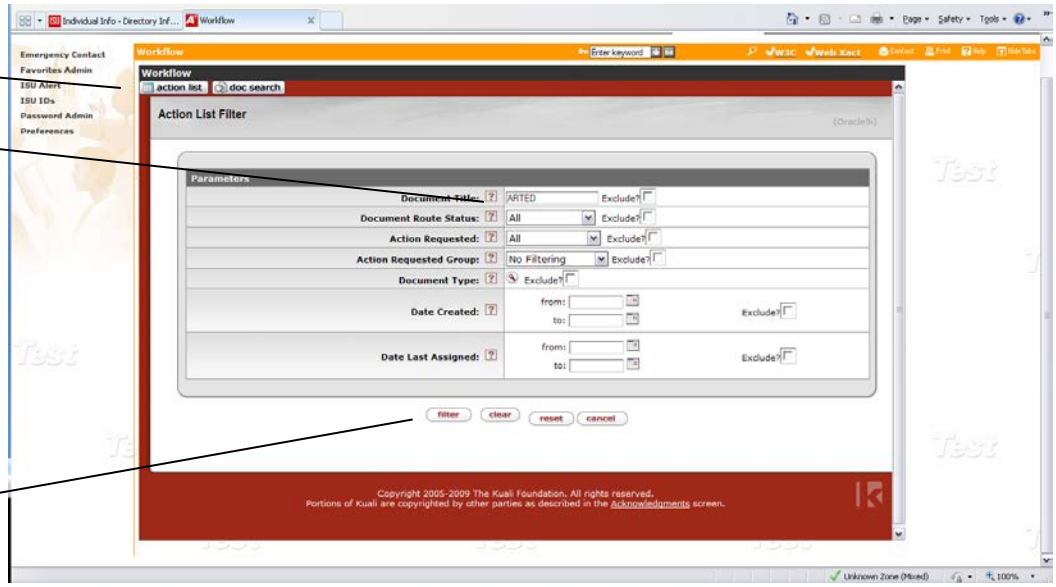


Example of request that was not approved:

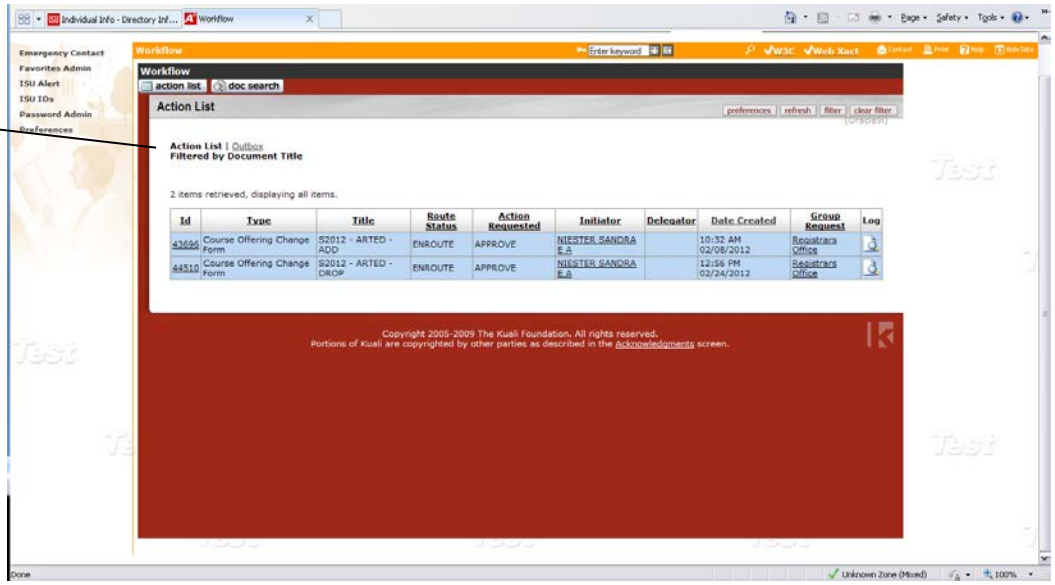


When finished press the X (close) on the "Edit document" **tab** at top of screen to close the window and return to workflow to complete other change requests or click on the action list on the left top of the screen. The back arrow does not work.

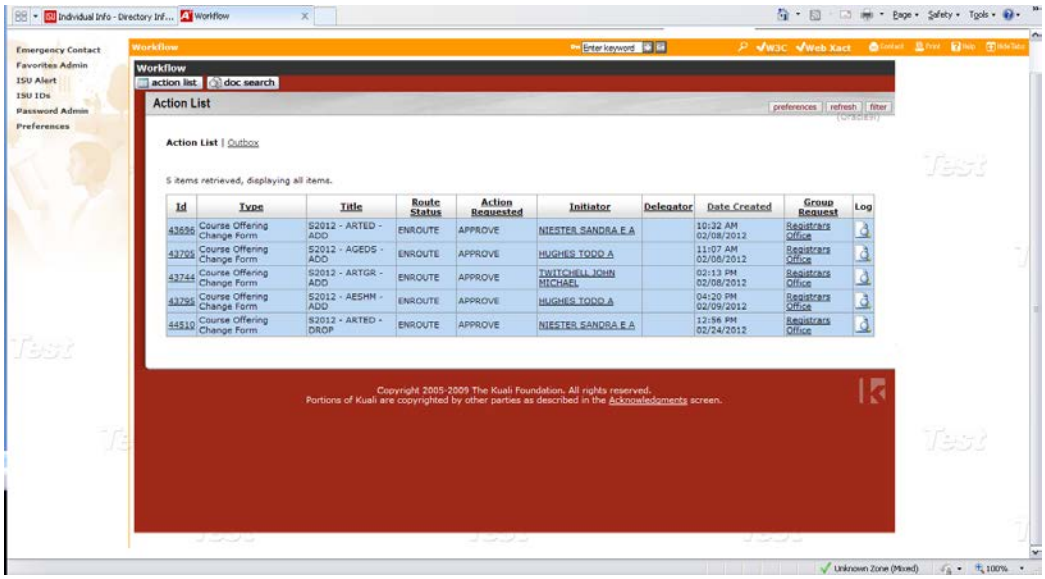
Filter: find a certain form to see where it is ENROUTE to or specific documents such as All DROPS:



Filtered Results:

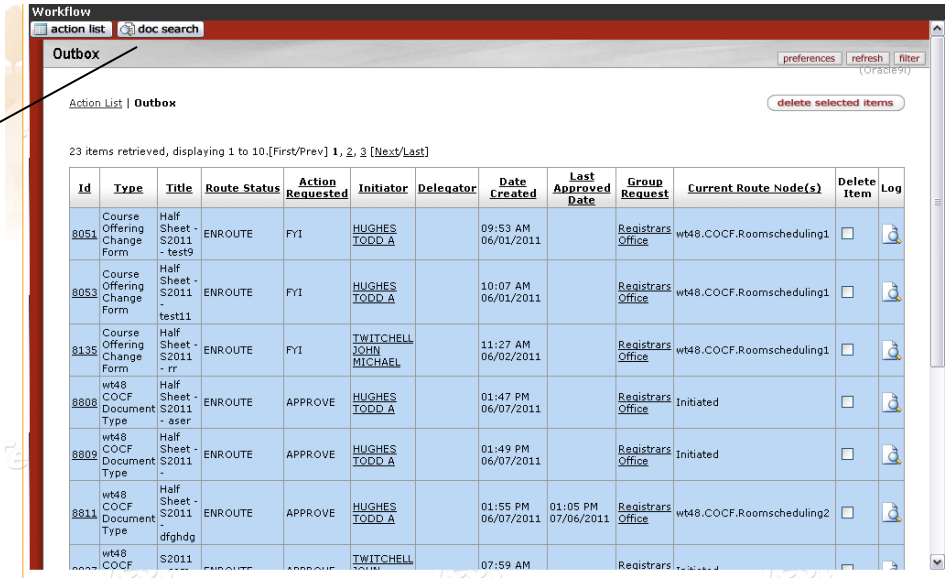


Press Clear Filter to go back to all Action list requests.



Document search in either the Action list or the Outbox action list

Doc search tab



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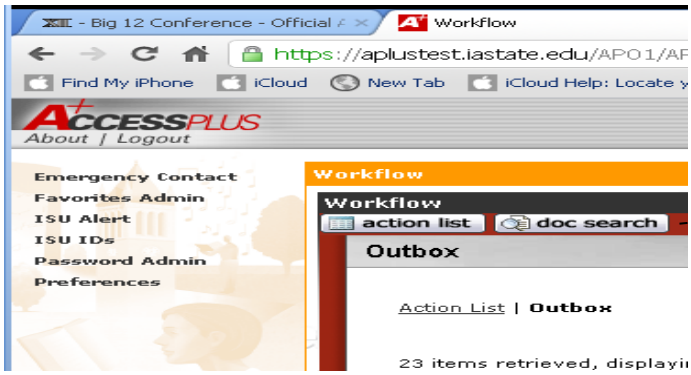
8135	Course Offering Change Form	Half Sheet - S2011 - rr	ENROUTE	FYI	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011		Registrars Office	wt48.COCF.Roomscheduling1		
8808	wt48 COCF Document Type	Half Sheet - S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011		Registrars Office	Initiated		
8809	wt48 COCF Document Type	Half Sheet - S2011 -	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011		Registrars Office	Initiated		
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		
	wt48 COCF	S2011			TWITCHELL		07:59 AM		Registrars			

Click on doc search- another new window will open:

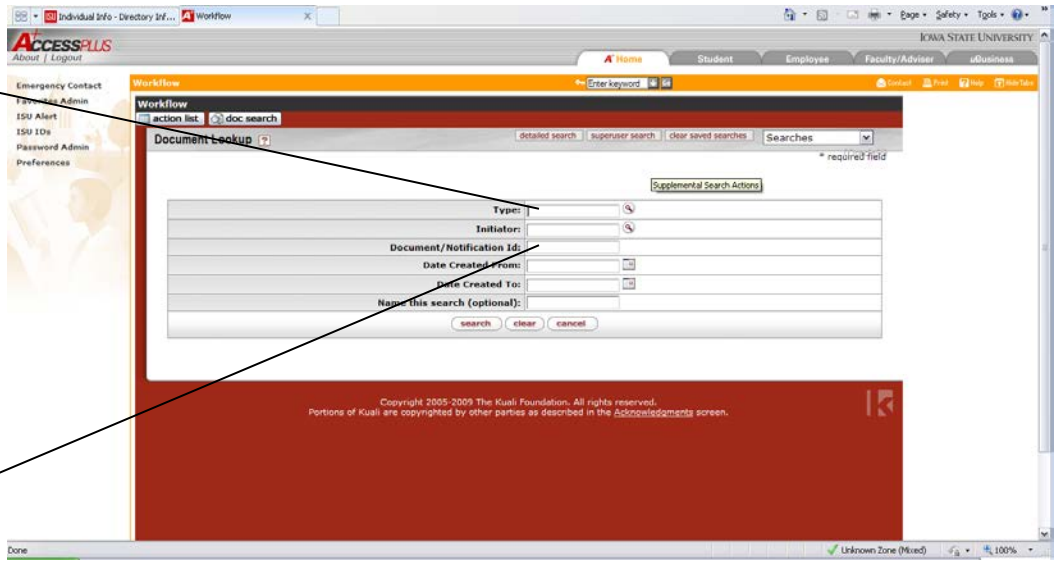


Doc search

Document look up window: Search

Enter *COCF in type area

Doc Id- use form Id

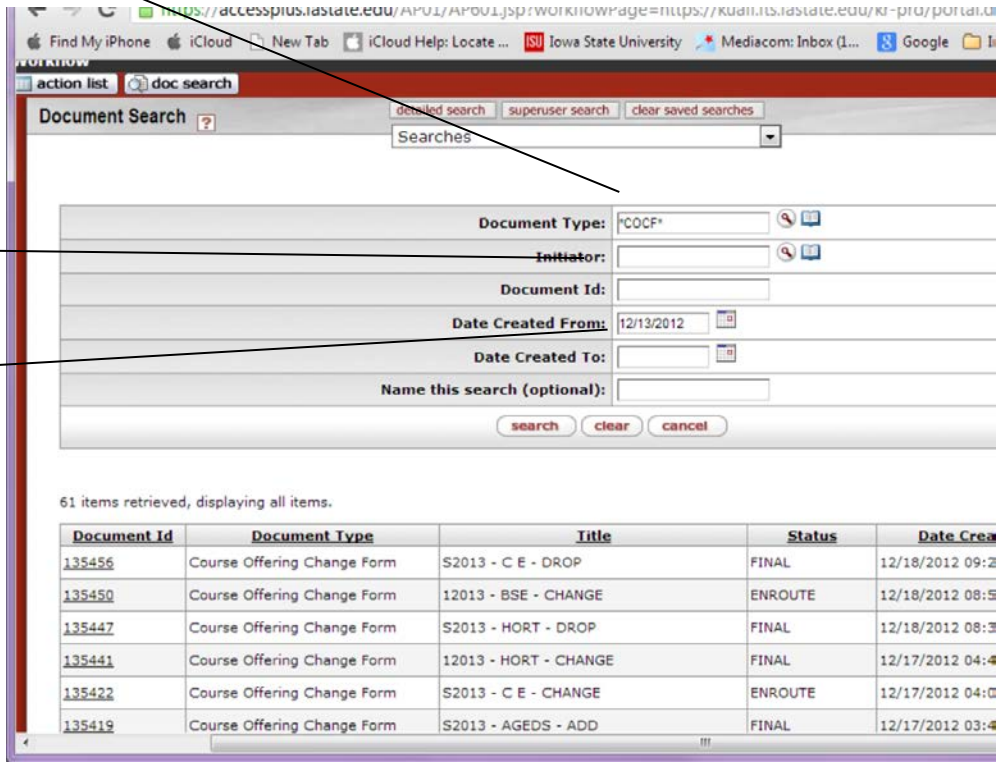


In the Document look up a Change form can be located quickly without manually searching through all of the change form requests.

Enter *COCF*

search by name, initiator netid- only if administrator or super user

Search by Date



On the standard doc search screen, you can enter the 'Type' of document you want to look for – in your case *COCF*. If you leave the 'Date Created From' field blank, it will default to today's date. So you will likely need to change the date. Or (***COCF***) - course offering change form

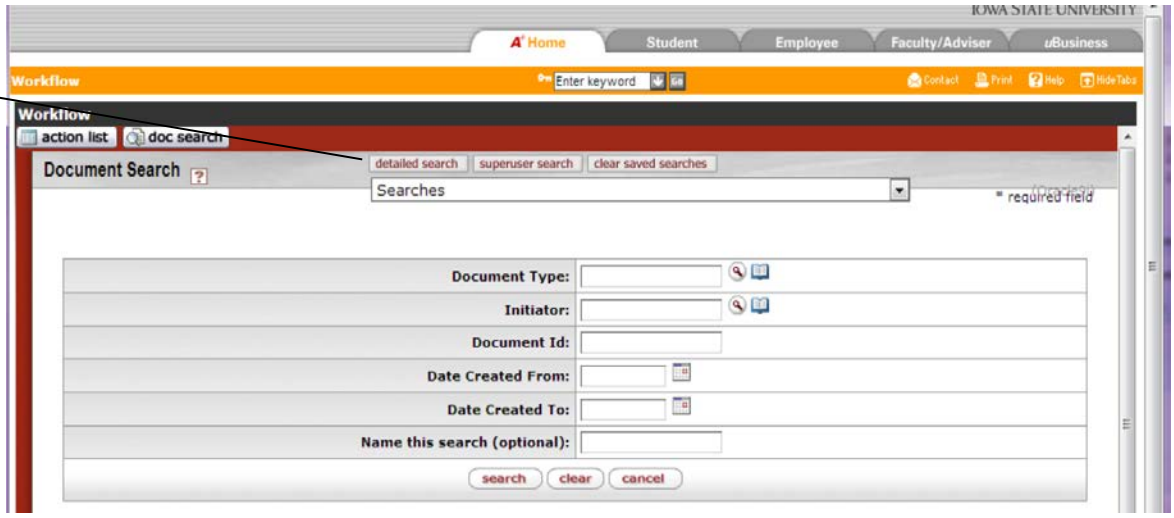
If you have a set of criteria that you will use over and over, you can enter a name in the 'Name this search' field and save that search. Then you will be able to run it again later by selecting it from the 'Searches' dropdown at the top of the page.

Under Advanced look up there are several different ways to located 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- the back arrow does not work.

Advanced Doc lookup as detailed search:

Click in detailed search



There are two types of document searches available in work flow. 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. Examples:

COCF	Will return records that have COCF somewhere in the text string. Any characters can precede or follow the COCF.
COCF*	Will return records that have COCF at the beginning of the text string. Any characters can follow the COCF.
*COCF	Will return records that have COCF at the end of the text string. Any characters can precede the COCF.

Information regarding specific fields:
Document Type – There are many forms used by the university that are routed through Kuali workflow. To search only for documents pertaining to the Course Offering Change Form you will

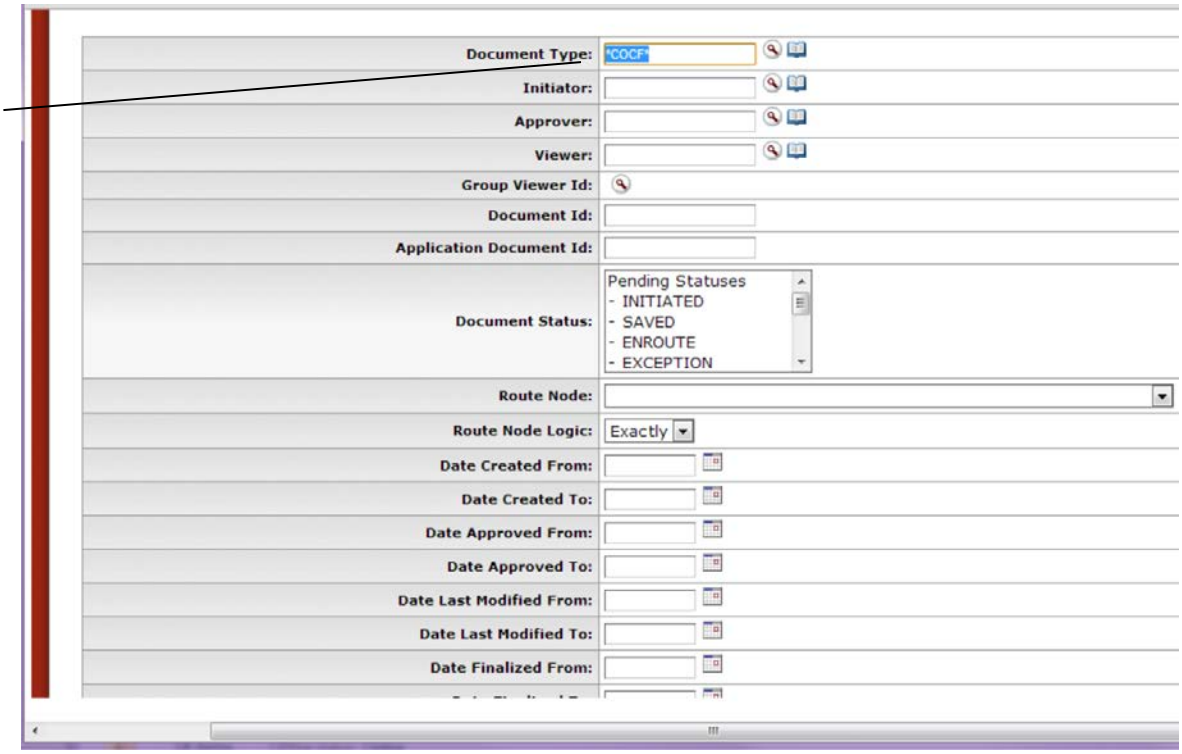
need to enter the correct type. For ease of entry, use the wildcard symbols to shorten entry - *COCF*.

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 becomes. Keep in mind that the system reads down through criteria and finds that documents.

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.*

Use Doc type*cocf*

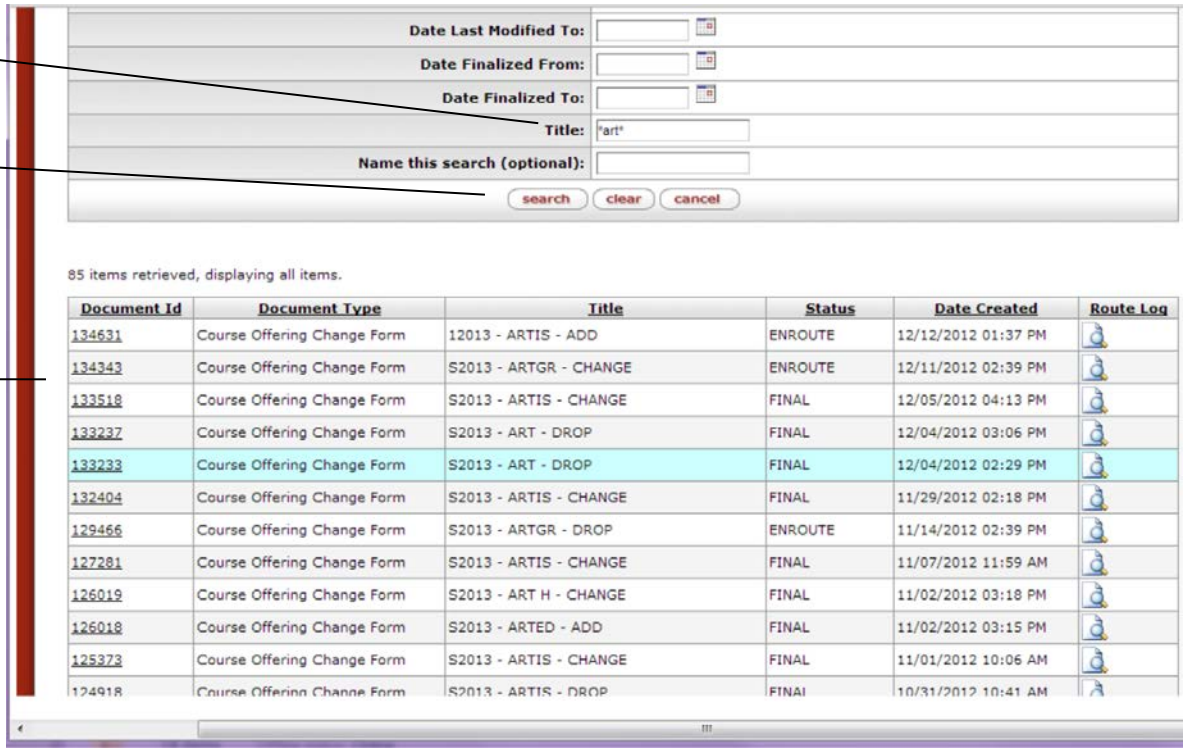


Detailed search assists you in limiting the search for a quicker search results. Use the *COCF* in the DOC type. Example of search by title: use wild card *-*ART* and ART courses will appear. If you use *ARTID* only ARTID courses will appear

Title Example

Press Search

Results



F=Fall, *S*=Spring, *1*=Summer in the title area.

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