

# **Iowa State University**

## Course Offering Change Form Instructions

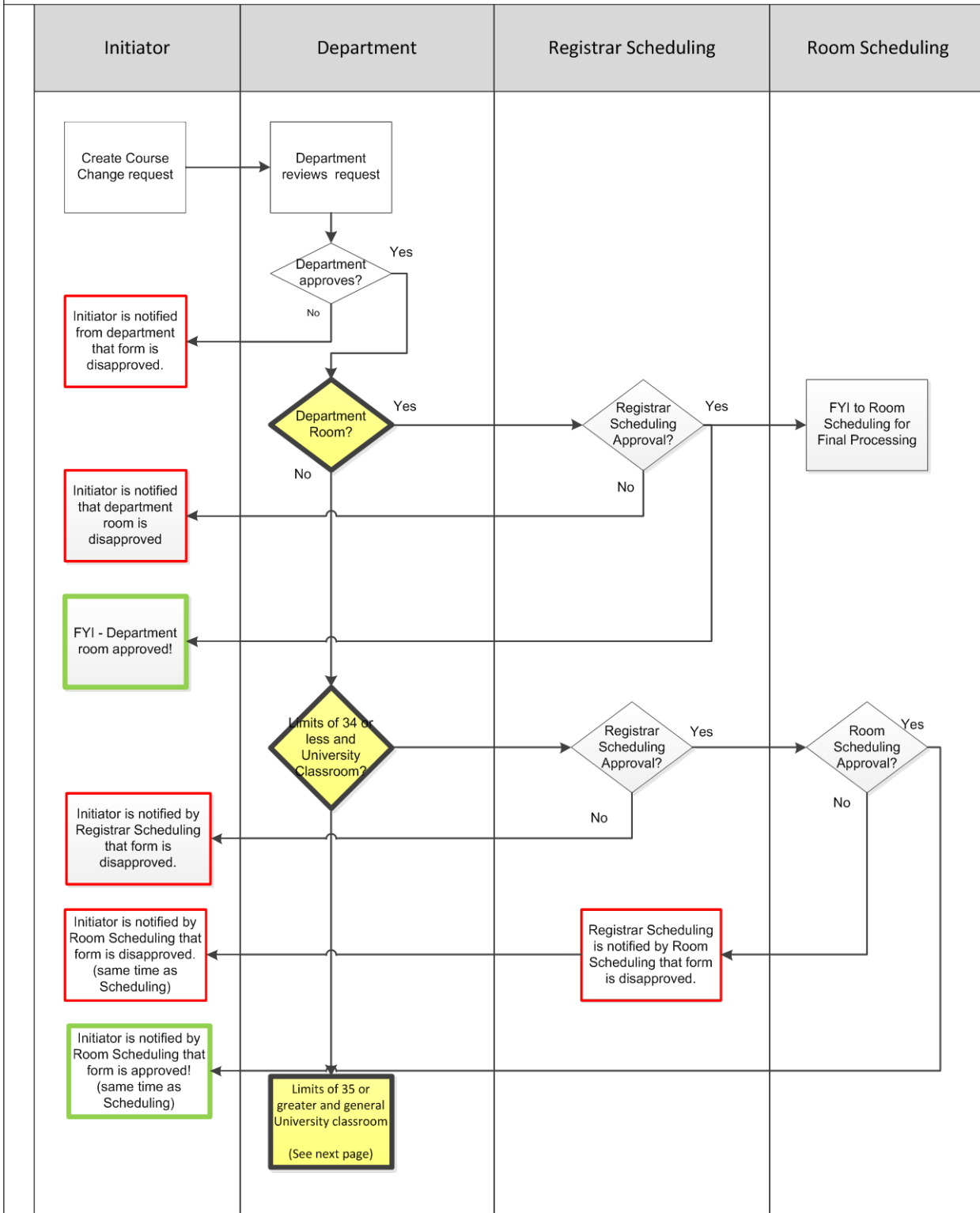
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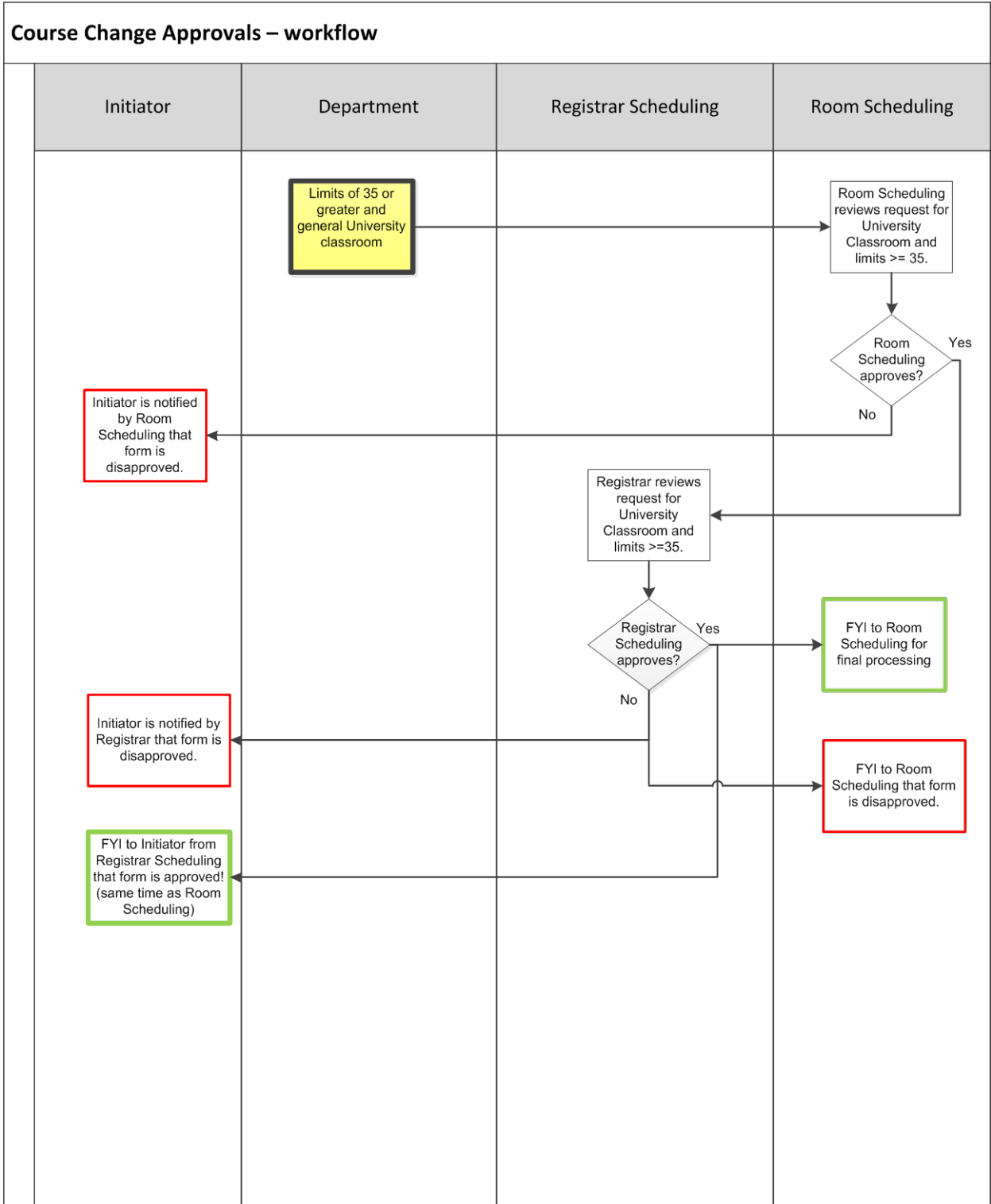
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# Course Offering Change form Workflow Graph

## Course Change Approvals – workflow



# 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 Quali 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

**Step 1:** Rm sched.

**Step 2:** Dept. & sem./yr

**Step 3:**

Add

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

**Drop**

**Reason For Changes**

Submit

Scroll bar

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.

You must select options

Teaching Dept \* Choose Dept

Semester/Year \* Choose Semester

\* Required Fields

Teaching Dept \*

Semester/Year \*

Teaching Dept \*

Semester/Year \*

\* Required Fields

**Add**

Course Number	Cou Sec	Credit
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"/>

**Comments**

Show Dropdown

E APP

E C

E CPE

E E

E M

E S E

E SCI

E ST

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 of dept- must be capitalized- this is case sensitive. Click in the down arrow. This will get you closer to your department choice

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.

Add area

Comments

**Add**

Course Number	Course Section	Offering Dates	Credits	Todays Limit	Max Limit	Day/Time (Instruction Type)	Suggested Room
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"/>
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"/>
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"/>

**Comments**

5 | Page

---

## Change area options;

**Change** (Credit, time, maximum limit only, today limit and maximum limit)

Course Number	Course Section	Change Type	From
1. <input type="text"/>	<input type="text"/>	<input type="text" value="Credit"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text" value="Time"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text" value="Max Limit Only"/>	<input type="text"/>

Change more courses

**Comments**

Change more courses

- Credit
- Time
- Max Limit Only
- Today Limit and Max Limit
- Room
- Half-Sem Msg
- Comments
- Other

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

Course Number	Course Section	Change Type	From	To
1. <input type="text"/>	<input type="text"/>	<input type="text" value="Credit"/>	<input type="text"/>	<input type="text"/>
2. <input type="text"/>	<input type="text"/>	<input type="text" value="Time"/>	<input type="text"/>	<input type="text"/>
3. <input type="text"/>	<input type="text"/>	<input type="text" value="Max Limit Only"/>	<input type="text"/>	<input type="text"/>

Change more courses

**Comments**

Change more courses

Change area

Comments

**Drop**

Course Number	Course Section	Comments
1. 271	6	no enrollment
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**

Test:

Submit

Drop section area

Step 4:

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 Kualu 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.

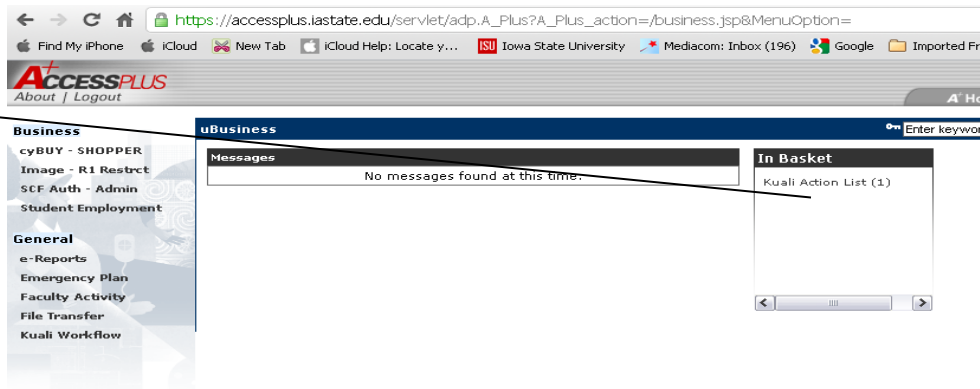
Once approved or disapproved the ID and information is removed from the Action list.

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 Kualii 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.

In Basket



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

**Outbox-** tracks what forms have been submitted and their progress:

Action List toggle switch

Action list /Outbox

Route Status

log

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.COFC.Roomscheduling1	<input type="checkbox"/>	
8052	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FY1	HUGHES TODD A		10:07 AM 06/01/2011		Registrars Office	wt48.COFC.Roomscheduling1	<input type="checkbox"/>	
8135	Course Offering Change Form	Half Sheet - S2011	ENROUTE	FY1	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011		Registrars Office	wt48.COFC.Roomscheduling1	<input type="checkbox"/>	

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

log

Title	S2012 - ARTED -
Type	Course Offering Change Form
Created	10:22 AM 04/27/2012
Initiator	TWITCHELL JOHN MICHAEL
Last Modified	01:25 PM 05/24/2012
Route Status	ENROUTE
Last Approved	
Node(s)	wt48.COFC.Registrar
Finalized	

Action	Taken By	For Delegator	Time/Date	Annotation
COMPLETED	TWITCHELL JOHN MICHAEL		10:22 AM 04/27/2012	Document Routed from the AccessPlus /KW01/R201COFC.jsp
APPROVED	HUGHES TODD A		07:45 AM 05/07/2012	
RETURNED TO PREVIOUS ROUTE LEVEL	MABEE MARCIA ANN		12:41 PM 05/24/2012	
RETURNED TO PREVIOUS ROUTE LEVEL	MABEE MARCIA ANN		01:25 PM 05/24/2012	

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Registrars Office	01:25 PM 05/24/2012	

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.



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

	Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
Add	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 style="border: 1px solid gray; height: 40px; width: 100%;"></div> <p><a href="#">Attach document</a></p> <p><a href="#">View attachments</a></p>	<div style="border: 1px solid gray; padding: 5px; text-align: center;">save</div>
View Notes			
Author	Date	Note	Action
Mabee, Marcia	03/22/2013 10:04 AM	disapproved- testing	<div style="border: 1px solid gray; padding: 2px;">edit</div> <div style="border: 1px solid gray; padding: 2px;">delete</div>
<div style="border: 1px solid gray; padding: 5px; display: inline-block;">acknowledge</div>			

**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.

**workflow**

Document Type Name:	wt48.COCF.DocTy
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\*
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Teaching Dept\* A\_B\_E

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	Course Number	Course Section	Offering Dates	Credits	Today's Limit	Max Limit	Day/Time	Instruction Type	Suggested Room
<b>Add</b>	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 style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p><a href="#">Attach document</a></p> <p><a href="#">View attachments</a></p>	<input type="button" value="save"/>
View Notes			
Author	Date	Note	Action
Mabee, Marcia	03/22/2013 10:03 AM	Returned to initiator	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="button" value="save"/> <input type="button" value="approve"/> <input type="button" value="disapprove"/>			

## 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 – Kualii Action list In the In Basket

Home tab

In Basket: Click Kualii Action list to see what needs to be approved

List of what needs to be approved:

Action List/Outbox- whichever is bold is the one active

Id 44510

<b>Id</b>	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	GROUP Request	Log
26514	Distribution Of Income And Expense	Distribution Of Income And Expense - test	ENROUTE	APPROVE	FOX STEPHANIE STROBE		02:31 PM 11/29/2011		
44162	Course Offering Change Form	2012 - ARTEO - CHANGE	ENROUTE	APPROVE	MARBE MARCIA ANN		04:16 PM 02/13/2012		
<b>44510</b>	Course Offering Change Form	2012 - ARTEO - DROP	ENROUTE	APPROVE	NIESTER SANDRA E.A		12:56 PM 02/24/2012		
44511	Course Offering Change Form	2012 - ARTEO - 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 form:

The screenshot shows the 'Iowa State University Course Offering Change Form' in a web browser. The browser address bar shows the URL: <https://kuallts.iastate.edu/kr-prd/kew/EDocLite?docId=845608.com.mand=edisplayActionListView>. The document title is 'Iowa State University Course Offering Change Form'. The document status is 'FINAL' and the create date is '09:03 AM 06/25/2012'. The document ID is '04560'.

The form is divided into several sections, each with a corresponding annotation box:

- Course information:** Points to the 'Teaching Dept' field (AGRON) and the 'Semester/Year' field (92013).
- Add:** Points to the 'Add' button and the 'Add' section of the table.
- notes:** Points to the 'Notes' section of the table.
- Change:** Points to the 'Change' button and the 'Change' section of the table.
- Drop:** Points to the 'Drop' button and the 'Drop' section of the table.
- initiator:** Points to the 'Initiator' field.
- Approver must approve, disapprove, or back to previous or save:** Points to the 'Approve', 'Disapprove', 'Return to previous', and 'Save' buttons.
- Id- Doc number:** Points to the 'Document ID' field (04560).
- Back to previous:** Points to the 'Return to previous' button.
- 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:** Points to the 'Initiated' dropdown menu.

The form includes a table for 'Add' and 'Change' sections, and a 'Drop' section. The 'Add' section has columns for Course Number, Course Section, Offering Dates, Credits, Today's Limit, Max. Limit, Day/Time, Instruction Type, and Suggested Room. The 'Change' section has columns for Course Number, Course Section, Change Type, From, and To. The 'Drop' section has columns for Course Number, Course Section, and Comment.

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.Roomscheduling1 split 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 be taken by the next approver. The outbox shows what needs to be approved by others or is finalized.

**Outbox**

Click on any of these and you can sort.

Click on these change preferences, refresh, add colors, filter or delete marked items

ID numbers

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	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"/>	

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.

**Who has approved or disapproved.**

Viewing Document

Drop

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

Reason for Change

Supporting Materials

Create Note

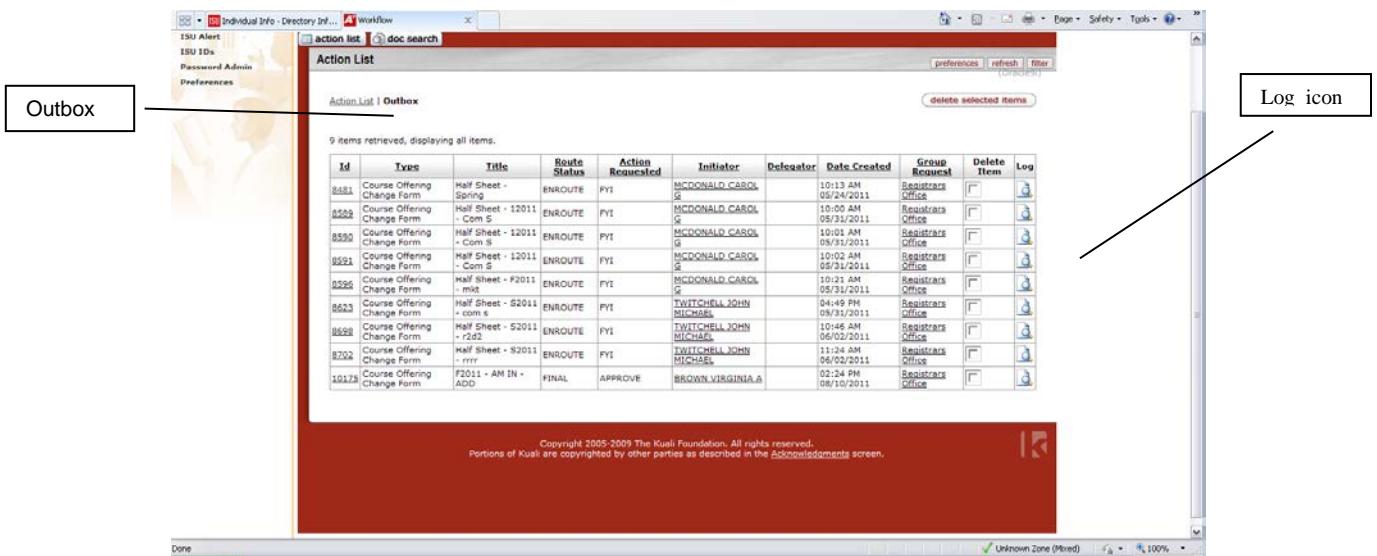
Author	Date	Note	Action
			<input type="button" value="Save"/>

View Notes

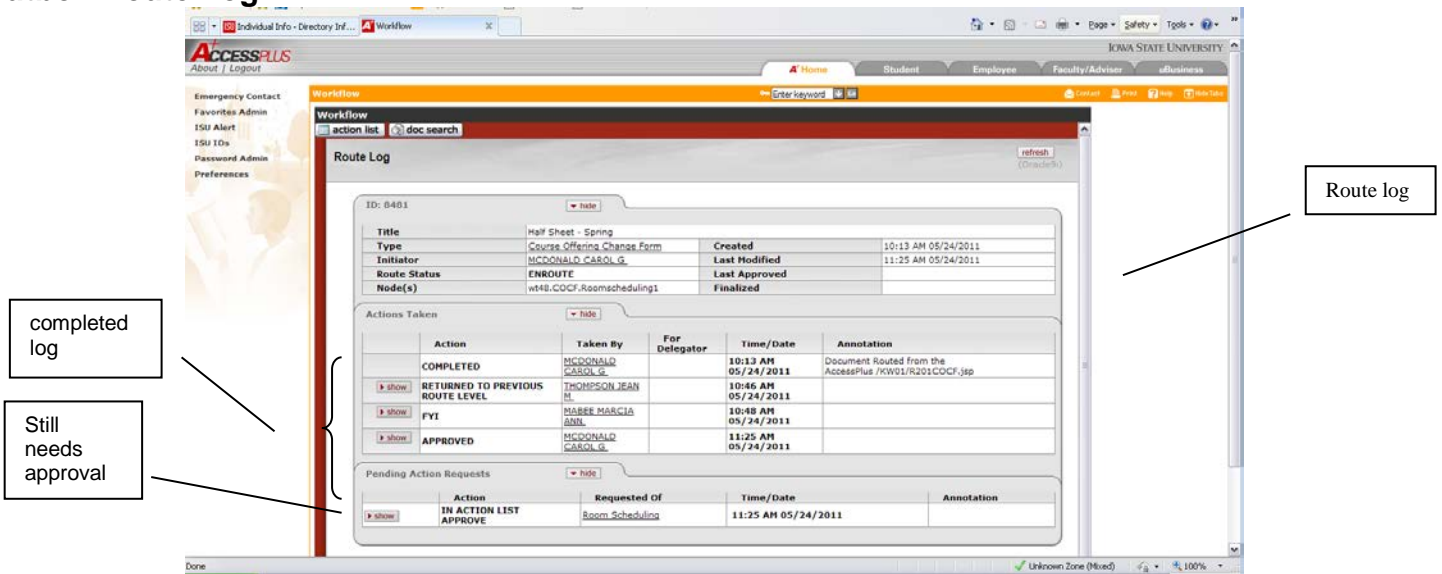
Author	Date	Note	Action
MCDONALD CAROL G	05/24/2011 11:23 AM	I changed ME 324A to meet 3 hours a day. It's enough time now. Please approve the form so it routes to Registrar's Office. It appears the "return to sender" option might be a really cool feature.	<input type="button" value="Approve"/> <input type="button" value="Disapprove"/>
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.	<input type="button" value="Approve"/> <input type="button" value="Disapprove"/>

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.

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

<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>Last Approved Date</u>	<u>Group Request</u>	<u>Current Route Node(s)</u>	<u>Delete Item</u>	<u>Log</u>
8051	Course Offering Change	Half Sheet - S2011	ENROUTE	FYI	HUGHES TODD A		09:53 AM 06/01/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	



## Making Kualo workflow individualized

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

Workflow Preferences

General

Automatic Refresh Rate: 15 in whole minutes - 0 is no automatic refresh.

Action List Page Size: 10

Email Notification: Immediate

Receive Primary Delegate Emails:

Receive Secondary Delegate Emails:

Delegate Filter: Secondary Delegates on Action List Page

Primary Delegate Filter: Primary Delegates on Action List Page

Fields Displayed In Action List

Document Type:

Title:

ActionRequested:

Initiator:

Delegator:

Date Created:

Date Approved:

Current Route Node(s):

WorkGroup Request:

Document Route Status:

Application Document Status:

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

Workflow Preferences

Application Document Status:

Clear FYI:

Use Outlook:

Document Route Status Colors for Actionlist Entries

Saved

Initiated

Disapproved

Enroute

Approved

Final

Processed

Exception

Canceled

save reset cancel

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Example of request that was not approved:

Not approved

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Delete Item	Log
8851	Course Offering Change Form	Half Sheet - S2011 - test9	ENROUTE	FYI	HUGHES TODD A		09:53 AM 06/01/2011	Registrars Office	<input type="checkbox"/>	
8853	Course Offering Change Form	Half Sheet - S2011 - test11	ENROUTE	FYI	HUGHES TODD A		10:07 AM 06/01/2011	Registrars Office	<input type="checkbox"/>	
8135	Course Offering Change Form	Half Sheet - S2011 - r1	ENROUTE	FYI	TWITCHELL JOHN MICHAEL		11:27 AM 06/02/2011	Registrars Office	<input type="checkbox"/>	
8858	W448 COCF Document Type	Half Sheet - S2011 - aser	ENROUTE	APPROVE	HUGHES TODD A		01:47 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8809	W448 COCF Document Type	Half Sheet - S2011 -	ENROUTE	APPROVE	HUGHES TODD A		01:49 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8811	W448 COCF Document Type	Half Sheet - S2011 - dfghdg	ENROUTE	APPROVE	HUGHES TODD A		01:55 PM 06/07/2011	Registrars Office	<input type="checkbox"/>	
8847	W448 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"/>	
8872	Course Offering Change Form	S2011 -	DISAPPROVED	APPROVE	TWITCHELL JOHN MICHAEL		06:30 AM 06/09/2011	Registrars Office	<input type="checkbox"/>	
8887	Course Offering Change Form	S2011 - JJJJ -	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		11:14 AM 06/09/2011	Registrars Office	<input type="checkbox"/>	

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:

Action List

Document title : DEPT, ADD, DROP, ect.- must be exact : use caps.

Press Filter:

Workflow  
action list | doc search

Action List Filter (Default)

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: [ ] to: [ ]	Exclude?	<input type="checkbox"/>
Date Last Assigned:	from: [ ] to: [ ]	Exclude?	<input type="checkbox"/>

filter clear reset cancel

## Filtered Results:

Filtered action

Workflow  
action list | doc search

preferences | refresh | filter | clear filter (1/2/2012)

Action List | Outbox  
Filtered by Document Title

2 items retrieved, displaying all items.

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
43654	Course Offering Change Form	S2012 - ARTED - ADD	ENROUTE	APPROVE	NIESTER SANDRA E.A		10:32 AM 02/08/2012	Registrars Office	
44514	Course Offering Change Form	S2012 - ARTED - DROP	ENROUTE	APPROVE	NIESTER SANDRA E.A		12:54 PM 02/24/2012	Registrars Office	

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

Workflow  
action list | doc search

preferences | refresh | filter (1/2/2012)

Action List | Outbox

5 items retrieved, displaying all items.

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Group Request	Log
43654	Course Offering Change Form	S2012 - ARTED - ADD	ENROUTE	APPROVE	NIESTER SANDRA E.A		10:32 AM 02/08/2012	Registrars Office	
43703	Course Offering Change Form	S2012 - AGEDS - ADD	ENROUTE	APPROVE	HUGHES TODD A		11:07 AM 02/06/2012	Registrars Office	
43744	Course offering Change Form	S2012 - ARTGR - ADD	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		02:13 PM 02/08/2012	Registrars Office	
43793	Course Offering Change Form	S2012 - AESHM - ADD	ENROUTE	APPROVE	HUGHES TODD A		04:20 PM 02/09/2012	Registrars Office	
44514	Course Offering Change Form	S2012 - ARTED - DROP	ENROUTE	APPROVE	NIESTER SANDRA E.A		12:54 PM 02/24/2012	Registrars Office	

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

Doc search tab

Workflow  
 action list doc search  
 Outbox preferences refresh filter (1/2/2011)  
 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	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"/>	
8822	wt48 COCF Document Type	Half Sheet - S2011	ENROUTE	APPROVE	TWITCHELL JOHN MICHAEL		07:59 AM 06/07/2011		Registrars Office	wt48.COCF.Roomscheduling1	<input type="checkbox"/>	

Click on doc search- another new window will open:

Big 12 Conference - Official A x Workflow  
 https://aplustest.iastate.edu/APO1/AF  
 Find My iPhone iCloud New Tab iCloud Help: Locate y  
 ACCESSPLUS About | Logout

Emergency Contact  
 Favorites Admin  
 ISU Alert  
 ISU IDs  
 Password Admin  
 Preferences

Workflow  
 Workflow  
 action list doc search  
 Outbox  
 Action List | Outbox  
 23 items retrieved, displayi

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

61 items retrieved, displaying all items.

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

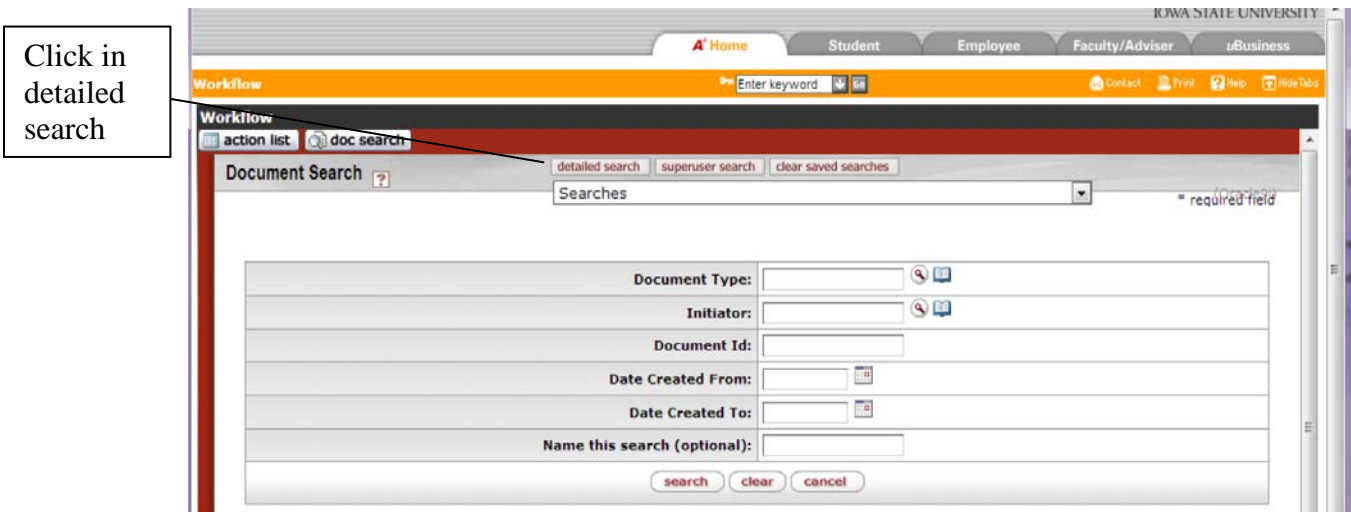
On the standard doc search screen, you can enter the 'Type' of document you want to look for – in your case \*COCF\*. If you leave the 'Date Created From' field blank, it will default to today's date. So you will likely need to change the date. Or (\*COCF\*) - course offering change form

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:**



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 Quali 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*.

A screenshot of a search interface. On the left, a callout box with a black border contains the text "Use Doc type\*cocf\*" and a line pointing to the "Document Type" field. The form itself has a light gray background and contains the following fields from top to bottom: "Document Type" (text input with "COCF" and a search icon), "Initiator" (text input with a search icon), "Approver" (text input with a search icon), "Viewer" (text input with a search icon), "Group Viewer Id" (text input with a search icon), "Document Id" (text input), "Application Document Id" (text input), "Document Status" (dropdown menu showing "Pending Statuses" with options: INITIATED, SAVED, ENROUTE, EXCEPTION), "Route Node" (dropdown menu), "Route Node Logic" (dropdown menu with "Exactly" selected), "Date Created From" (date picker), "Date Created To" (date picker), "Date Approved From" (date picker), "Date Approved To" (date picker), "Date Last Modified From" (date picker), "Date Last Modified To" (date picker), and "Date Finalized From" (date picker).

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

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	FINAI	10/31/2012 10:41 AM	

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

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