Course Offering Change Form (COCF) Instructions

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2. Initiator Blank Request Form
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4. Department/Program Head, Registrar, and Room Scheduling directions
5. How to check the progress of a request and view log
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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.

**Step 1:**
- Room Scheduling Routing

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

**Step 3:**
- Add Change Drop

**Step 3:**
- Submit
Request and Submit a COCF

Initiator Directions:
Step 1: Select Room Scheduling routing options.

<table>
<thead>
<tr>
<th>Course Offering Changes Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select one of the following options.</td>
</tr>
<tr>
<td>☐ Registrar then Room Scheduling - courses cancelled, WWW, unpublished, course notes, or restrictions</td>
</tr>
<tr>
<td>☐ Room Scheduling then Registrar - adds/changes to FF or HYB courses, includes all general classrooms and departmental spaces</td>
</tr>
<tr>
<td>☐ Room Scheduling only - room location only, no limit changes</td>
</tr>
</tbody>
</table>

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 This option is used for course offerings being cancelled, online (WWW), unpublished courses, or restriction changes.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

Click in box, clear Choose Department. Type in 1st 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.
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.

DROP Course Request

Provide additional comments regarding the drop request. For example, low enrollment, course offered even-year only, etc.
Step 4: Click **Submit** at the bottom of the screen after the form has been filled out.

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 Kuali Outbox of the Initiator.

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.
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.
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.
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

List of what needs to be approved:

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

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.

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:
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.
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*.

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.

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

Click on doc search and another new window will open.

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

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.
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.**

<table>
<thead>
<tr>
<th><em>ART</em></th>
<th>Will return records that have ART somewhere in the text string. Any characters can precede or follow the ART.</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>COCF</em></td>
<td>Will return records that have COCF somewhere in the text string. Any characters can precede or follow the COCF.</td>
</tr>
</tbody>
</table>

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_.

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**Click in detailed search**

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*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](http://www.registrar.iastate.edu/courses/offeringinfo.shtml)

Detailed search:

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