



Curriculum Services  
Office of the Provost

## **Course Catalog Update Workflow**

User Guide  
August 2016

## Table of Contents

About the Course Catalog Update Workflow .....	3
Workflow Approval process.....	4
Kent Campus Course Approval Process .....	4
KSU Regional Campus Course Approval Process .....	4
Workflow Roles and Communication .....	4
Open a New Form .....	5
Access the Workflow Page.....	5
Initiate a Workflow .....	5
Complete a Form .....	7
Print and Submit a Form .....	8
Print to PDF .....	9
View the Status of a Submitted form (Historical View) .....	10
Edit a Draft or Approve a Form.....	11
Delegate Work To a Proxy Approver .....	13
Cancel a Proxy Assignment .....	13
How Work is Shared Between Approver and Proxy .....	14
Release a Form to Your Colleague .....	14

## About the Course Catalog Update Workflow

This workflow form is used by Curriculum committees, program coordinators, faculty, administrators, and support staff to document and request new courses, course revisions, and course inactivation.


One form is required per new course, course revision, or course inactivation. Forms should be completed in accordance with University Curriculum Guidelines at:

<http://www.kent.edu/provost/curriculum/guidelines>

A form may be saved as a draft indefinitely, and there is no time limit on how long a form may circulate in workflow. A form may be printed at any stage of development.

A form may be initiated and submitted from any internet computer, but if it is saved as a draft, the draft must be completed from a KSU campus computer, or an off-campus computer logged into the KSU VPN (Virtual Private Network). A form must be reviewed from a KSU Campus or Kent VPN computer.

(A VPN account may be requested from the Help Desk)

Program Coordinators, the IS Training Department, and the Help Desk can assist with the use of this workflow. Contact [istraining@kent.edu](mailto:istraining@kent.edu) for help or training. Help notes are linked throughout the form, marked by the information icon: 

Do not open more than one workflow form at a time, as multitasking is not supported and may result in data errors.

It is recommended that the following web browsers be used:

PC Computers:	Internet Explorer or Firefox
Apple Computers:	Safari

Questions about course update policies or proxy approvals for this workflow should be directed to curriculum Services or a program coordinator. Additionally, Curriculum Services should be notified immediately of any changes or a workflow approver role.

## Workflow Approval process

### *Kent Campus Course Approval Process*



### *KSU Regional Campus Course Approval Process*



\*Courses with special attributes, such as LER, WIC, etc. are reviewed by the University Requirements Curriculum Committee.

## Workflow Roles and Communication

Role of:	Will receive the following confirmations/notifications
Initiator	<ul style="list-style-type: none"><li>• On-screen confirmation of form submission</li><li>• E-mail confirmation of form submission</li><li>• E-mail notification of returned to the initiator for edit (the form will appear in the worklist of the initiator)</li><li>• E-mail notification of form completion or denial</li></ul>
Approver	<ul style="list-style-type: none"><li>• On-screen confirmation of form submission</li><li>• E-mail notification of returned to the reviewer for edit (the form will appear in the worklist of the reviewer)</li><li>• E-mail notification of form completion or denial</li></ul>
Proxy	<ul style="list-style-type: none"><li>• <b>No Notifications</b> – the workflow should be viewed regularly</li></ul>

## Open a New Form

### *Access the Workflow Page*

Via FlashLine, the link to open the Course Catalog Update Workflow can be found in the Employee Category, Workflows page, and HR & Employee Workflows section. Clicking the link will open the workflow page.

The screenshot shows the FlashLine interface for HR & Employee Workflows. The left sidebar contains a navigation menu with the following items: Welcome, KSUView, Student, Employee (highlighted), Dashboard, Workflows (with a sub-item 'HR & Employee Workflows' highlighted), Maintenance/FAMIS, Resources, Reports (Cognos), Faculty & Advisors, University Resources, and My Dashboard. The main content area is titled 'HR & Employee Workflows' and includes a section 'Where can I find my **worklist**?'. Below this, there is a grid of workflow links. The 'Course Catalog Update' link is highlighted with a red box. Other visible links include Ellucian Workflow, Expense Reimbursement Workflow, Cellular Device Authorization, FlashCart, Banner Security Workflow, Electronic Personnel Action Forms, Employee Transaction Workflow (ETW), Equipment, Vehicle & Vessel Acquisition, Notice of Separation, Notice of Voluntary Separation Archived, Position Request Authorization (PRA), Position Request Authorization (PRA) Tutorial, Scholarship Payment Authorization, Tuition Waiver Benefit Request, Section Meeting Time Location, Section Title Change, and CampusWorks.

### *Initiate a Workflow*

A workflow may be started by selecting **Begin a New Course Catalog Update Workflow**.

The screenshot shows the 'Course Catalog Update' workflow initiation page. The page header includes the Kent State University logo, user information (Name: John F Rocco, Submission Date: 8/4/2016), and organization (Training and PM). The main heading is 'Course Catalog Update'. Below this, there is a red box containing the text 'Begin a New Course Catalog Update Workflow: [checkbox]'. Below the red box is the text '- OR -'. Further down, there is a link 'Click here to search for historical Catalog Update Workflows.' and a paragraph of text: 'If you are looking for a draft or returned Catalog Update workflow, please look in the 'My Worklist' channel on the 'My Action Items' tab in Flashline.'

Selecting the option to start a new workflow delivers choices to **Establish a new, Revise an existing, or Inactivate** a course.

**KENT STATE UNIVERSITY** Name: John F Rocco Submission Date: 8/4/2016  
Organization: Training and PM

**Course Catalog Update**

**Certification of Curriculum Proposal and Basic Data Sheet**

**Select what you would like to do:**

Establish a New Course

Revise an Existing Course

Inactivate an Existing Course


**Please note:** Please do not use the 'Forward' and 'Back' buttons on your browser's toolbar to navigate through this application. Please use the menu and the 'Next' and 'Previous' buttons provided on the form. This application was opened in a new window. You can return to Flashline and your previous browser session by closing this window.

**Notes:** The form does not work with the browser **Forward** and **Back** buttons. The end of each form page includes a **Next** and **Previous** button for navigation.

The form will display a prompt if required information is missing, or if data must be entered in a particular format.

Certain fields must be completed for the page to be accepted and to continue to the next page of the form.

If the form is being developed as a draft, placeholder text such as “TBD” or “Pending” may be entered into required fields to allow for advancement to the next page.

Instructions may be viewed for a page by clicking on the information icon  where it is available on a page.

To prevent data corruption, **only one workflow should be opened at any time.**

## Complete a Form

**Course Catalog Update**

**\*Required Field**

- Basic Course Data  
Attributes  
Prerequisites  
Content Information  
Proposal Summary  
Complete

Establish a New Course

Change Type: Establish

\*Preparation Date: 08/04/2016

\*Requested Effective Term: Select Effective Term. . .

\*Course Subject: Select Subject. . .  
NOTE: If subject doesn't exist, then you need to contact Curriculum Services before submitting this form.

\*Course Number:   
NOTE: Please verify with Curriculum Services that the chosen course number is available. If slash courses, you must complete a separate form for each course.

\*College: Select College. . .

\*Dept: Select Department. . .


\*Course Title:   
NOTE: Please do not use the following restricted characters: (~ \* / \ --)

Enter the necessary data to complete the page as required.

1	Help text and examples are provided for many of the data fields.	<div> <div>Slash Course and Cross-List Information:</div> <div>Example: ENG 12345 + SPED 12345</div> </div>
2	A field marked with an asterisk is a required field. Placeholder text may be entered if the information is not known and the form is to be saved as a draft.	<div>*College: Select College</div>
3	Instructions are available by clicking on the information icon where available.	<div>Contact Hours </div>
4	Certain fields cannot accept special characters and are noted under the field.	NOTE: Please do not use the following restricted characters: (~ * / \ --)
5	Navigation buttons are located at the bottom of each page.	<div>Previous Save Next</div>
6	A <b>Navigation Pane</b> at the top, left of the page lists the parts of the form and notes the form completion progress. A dash to the left of a page title indicates the page is completed. The current page is listed in bold type.	<div> - Basic Course Data  Attributes  Prerequisites  Content Information  Proposal Summary  Complete </div>
7	Comments and History fields become active when a form is saved as a draft, or submitted for approval.	<div>Comments:</div> <div>History:</div>
8	Clicking the <b>Finish</b> button on the last page opens a final version of the form. (see the <b>Print and Submit a Form</b> ).	<div>Previous Save Finish</div>


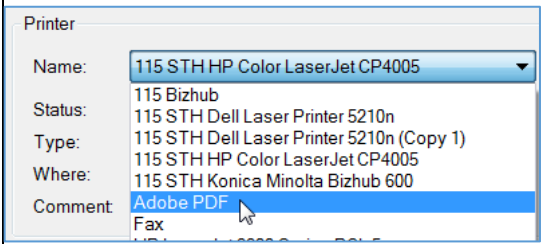
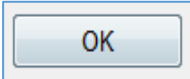
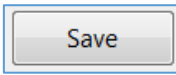
7

## Print and Submit a Form

 Name: John F Rocco Organization: Training and PM Submission Date: 8/4/2016	
<b>Course Catalog Update</b>	
<a href="#">&lt;&lt; Go back to Course Catalog Update form</a> <span style="float: right;"><a href="#">Print</a></span>	
<b>Course Catalog Update Information:</b>	
<b>Reference Number:</b> CCU010787	<b>Date:</b> 04-AUG-16
<b>Level:</b> of	<b>Currently On The Worklist Of:</b> , unassigned
<b>Owner:</b> Office of Curriculum Services, 330-672-8558 or 330-672-8559, curriculum@kent.edu	
<b>Basic Course Data</b>	
<b>Change type:</b> Establish	
<b>Faculty member submitting this proposal:</b>	
<b>Requested Effective Term:</b> 202180	
<b>Campus:</b> Kent	
<b>College:</b> CA-Arts, The	
<b>Department:</b> MUS-Music	
<b>Course Subject:</b> MUS-Music	
<b>Course Number:</b> 99999	
<b>1</b>	Form data can be viewed but not edited. A link at the top, left of the page returns an editable form.
<b>2</b>	A link to <b>Print</b> is in the top, right.
<b>3</b>	The longer forms, <b>Establish</b> and <b>Revise</b> have the option to save as a draft. Inactivate does not.
<b>4</b>	If saved as a draft, the form will display a note at the top with a reference number. The workflow may be closed and opened later
<b>5</b>	Clicking <b>Proceed</b> on the Establish, or Revise form, or <b>Next</b> on the Inactivate form yields the <b>Comments</b> field.
<b>6</b>	Clicking <b>Submit</b> sends the form for approval.
<b>7</b>	A confirmation message is displayed. Clicking the "X" at the top, right closes the form
<b>8</b>	<b>Stop Workflow</b> freezes the form. No further approvals or revisions can be made. This is used to cancel a form in process.



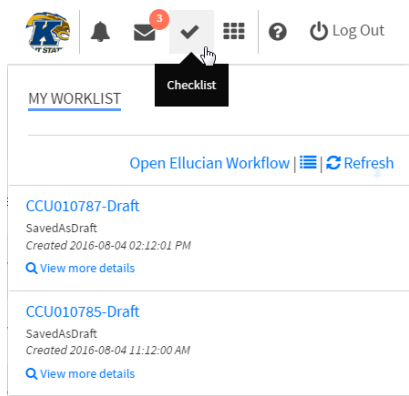
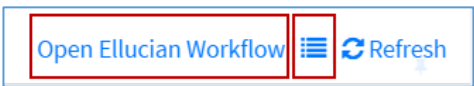
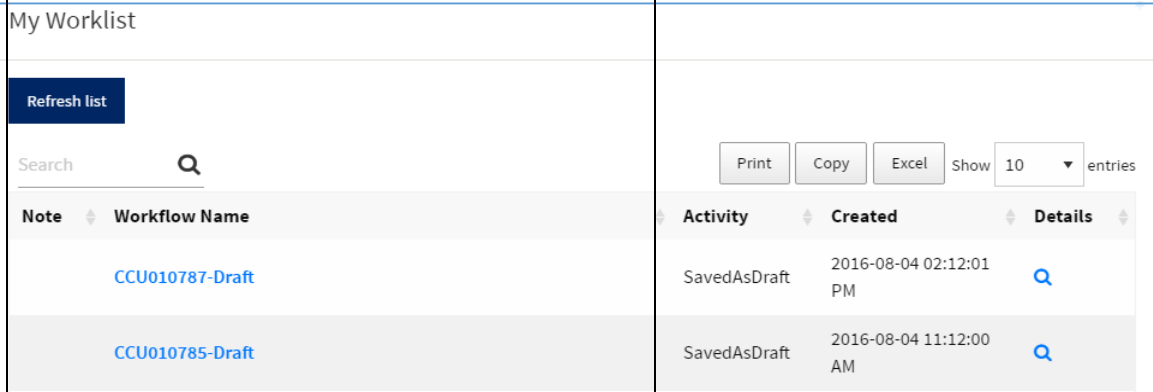
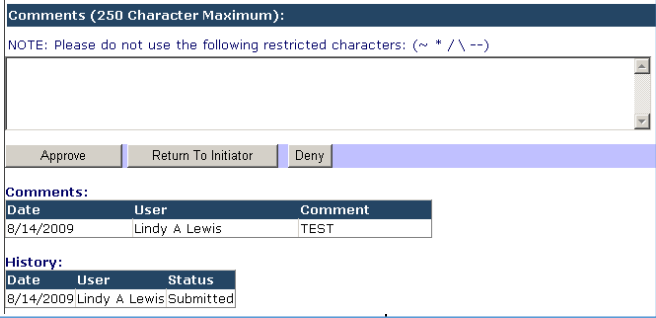
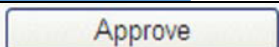
## Print to PDF

<b>1</b>	A link to <b>Print</b> is at the top, right	
<b>2</b>	The Print button opens a dialog box. From the list, an option of <b>Save to PDF</b> should be available.	
<b>3</b>	The <b>OK</b> button initiates the action.	
<b>4</b>	A location for the document to be saved should be selected, and the Save button clicked.	

## View the Status of a Submitted form (Historical View)

1	In FlashLine, via the Employee Category and the HR & Employee Workflows section of the Workflows page, is access to the Course Catalog Update from a link.	<div>Course Catalog Update</div>														
2	The course Catalog Update page contains a link to view previously submitted forms.	<a href="#">Click here to search for historical Catalog Update Workflows.</a>														
3	Search criteria can be typed into one or more fields to search for forms.  Wildcard searching (%__%) may be used to simplify searching.	<div>Course Subject: %acc%</div>														
4	An action may be selected from the drop down list provided.	<div>Action: Select Action. . . Select Action. . . Establish Revise Inactivate</div>														
5	The Workflow Name is displayed each time the form is saved, as well as in e-mails and printed copies to simplify locating the form.	<div>CCU010788-Draft SavedAsDraft Created 2016-08-04 04:16:13 PM</div>														
6	The Search button initiates the search.	<div>Search</div>														
7	From the search results, the desired form can be selected.	<div>Select</div>														
<div>1 record(s) found.</div> <table><tr><th></th><th>ID</th><th>Name</th><th>Current State</th><th>Running</th><th>Start</th><th>Stop</th></tr><tr><td>Select</td><td>2611395</td><td>CCU000903: Course-LIS 60600 Term-201080</td><td>started.running</td><td>Y</td><td>08/13/2009</td><td></td></tr></table>				ID	Name	Current State	Running	Start	Stop	Select	2611395	CCU000903: Course-LIS 60600 Term-201080	started.running	Y	08/13/2009	
	ID	Name	Current State	Running	Start	Stop										
Select	2611395	CCU000903: Course-LIS 60600 Term-201080	started.running	Y	08/13/2009											
8	The name of the current worklist owner displays on the form view.	<div>Currently On The Worklist Of: Sommers, Marcella</div>														
9	Links to print the form and return to the search results are available on the screen.	<div>Course Catalog Update <a href="#">&lt;&lt; Return to Search Results</a></div>														

## Edit a Draft or Approve a Form



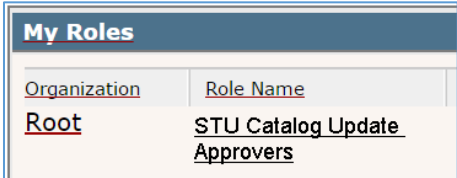
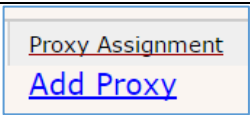
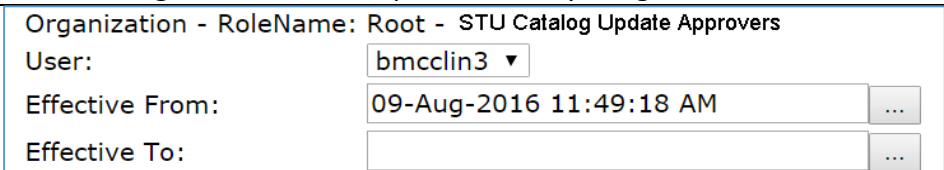
1	In FlashLine, clicking the <b>Checklist</b> icon located in the Top Bar displays all current worklists.	
2	Clicking on the link to “ <b>Open Ellucian Workflow</b> ” or the “ <b>View Detailed Display</b> ” icon will show a full screen view which displays all forms and the form priority.	
	My Worklist	
3	Course Catalog Update form names start with <b>CC</b> , as seen in the example. Clicking on the workflow form name (in blue text) opens the form.	
4	If the form is to remain a draft, edit and save the form as a draft again. To approve a form, review all of the data carefully and continue below.	
5	Forms pending approval have a <b>Comments</b> field. The comments field cannot accept certain characters as noted.	( ~ * / \ -- )
		
6	<b>Approve</b> sends the form to the next approver.	

7	If edits or corrections are needed, a comment should be added to explain the change, and the form can be sent with buttons to <b>Return To Initiator</b> , or <b>return To Approver</b> as applicable.	<div>Return To Initiator</div> <div>Return To Approver</div>
8	<p>The <b>Deny</b> button is used to reject a form. A comment should be added to explain the reason for the denial.</p> <p>The <b>Deny</b> button is also used to stop a form which is no longer needed. The form will not return to the initiator, nor pass to the next approver in the workflow. A stopped form is only viewable in the historical view.</p>	<div>Deny</div>
9	A note of confirmation of the action taken appears on the screen after completion.	<div>You have successfully approved this Course Catalog Update.</div>

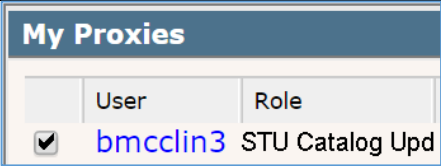

## Delegate Work To a Proxy Approver

- Only an approver can enable or disable his/her proxy assignments
- Proxy changes must be made from a KSU Campus or Kent VPN Computer.
- The person being designated as Proxy must have access to the workflow in order to approve forms. Access should be requested well in advance of as access requests take time to process.
- A Proxy will not receive email notifications. They must check **My Worklist** often to view and process forms.
- Work initiated prior to the Proxy designation will not be seen by the Proxy and must be completed by the original approver.

Contact the Help Desk at 330-672-4537 to request a VPN, or Virtual Private Network account.

1	From FlashLine, access the Checklist and select <b>Open Ellucian Workflow</b>	
2	In the <b>User Profile</b> section, select the link to open <b>User Information</b>	
3	In the pane labeled <b>My Roles</b> , locate the row named <b>STU Catalog Update Approvers</b>	
4	In the furthest right column noted as Proxy Assignments, click <b>Add Proxy</b> .	
5	From the drop down options, the proxy can be selected by KSU ID, and the effective dates added. Clicking the <b>Save</b> button puts the Proxy assignment into effect.	
		

## Cancel a Proxy Assignment

1	Assignments can be cancelled under the section labeled <b>My Proxies</b> . Select the Proxy to be removed.	
2	Click the <b>Delete Selected Proxies</b> button.	

## How Work is Shared Between Approver and Proxy

Approvers designate at least one individual to be a ‘Proxy-in-waiting’. The proxy is given access needed to approve a form, **but the proxy is not enabled in the workflow, and will not see the work unless the APPROVER allows it.**



The Approver enables or disables the proxy by following the instructions to Add a Proxy. As soon as a proxy is enabled, they will see any **NEW** forms which appear in the worklist.

***A Proxy cannot see forms started prior to being enabled to see the workflows.***

Examples below show Grade Change workflows.

Situation	Approver Sees	Proxy Sees																
No Proxy is enabled.  Only the approver can see the workflow.	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Ready</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Ready	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody></tbody></table>	Organization	Workflow						
Organization	Workflow																	
Root	CCU010788-Draft Ready																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
Organization	Workflow																	
The Approver Enables the Proxy.  Both can view forms and do work	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Ready</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Ready	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Ready</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Ready	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready
Organization	Workflow																	
Root	CCU010788-Draft Ready																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
Organization	Workflow																	
Root	CCU010788-Draft Ready																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
The Approver has opened and closed a form, “Claiming” it. ( <b>Performing</b> appears under the form title.) The Proxy no longer sees the form.	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Performing</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Performing	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Performing</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Performing	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready
Organization	Workflow																	
Root	CCU010788-Draft Performing																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
Organization	Workflow																	
Root	CCU010788-Draft Performing																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
The approver has released the form making it available to both users. ( <b>Ready</b> ) appears below the title.	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Ready</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Ready	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready	<div>Worklist</div> <table><thead><tr><th>Organization</th><th>Workflow</th></tr></thead><tbody><tr><td>Root</td><td>CCU010788-Draft Ready</td></tr><tr><td>Root</td><td>CCU010787-Draft Ready</td></tr><tr><td>Root</td><td>CCU010785-Draft Ready</td></tr></tbody></table>	Organization	Workflow	Root	CCU010788-Draft Ready	Root	CCU010787-Draft Ready	Root	CCU010785-Draft Ready
Organization	Workflow																	
Root	CCU010788-Draft Ready																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	
Organization	Workflow																	
Root	CCU010788-Draft Ready																	
Root	CCU010787-Draft Ready																	
Root	CCU010785-Draft Ready																	

## Release a Form to Your Colleague

When one person opens a form, it vanishes from the worklist of the other person. The form should be completed, or released so it may be seen by all with access.	
The magnifying glass to the right of the workflow opens the details screen.	
The <b>Release</b> link places the form back in the workflow for all to access.	 <b>Release</b>