

# **Curriculum Services Office of the Provost**

# Course Catalog Update Workflow

**User Guide** 

September 2013

Title	Course Catalog Update Workflow User Guide
Date	September 2009 Updated: September 2013
Author	Julie Kennedy, IS Technical Training
Copyright	Kent State University and Sungard Higher Education, 2009
Process Owner	Curriculum Services, Office of the Provost
Get help with this process	Curriculum Services, 330 672-8558 IS Technical Training, istraining@kent.edu
Get help with Workflow Access	Contact the Help Desk, 672-HELP (672-4357)

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#### **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 inactivations.

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



http://www.kent.edu/provost/curriculum/index.cfm

(Or search for **Curriculum Services** at http://www.kent.edu)

A form may be saved as 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 draft, the draft must be completed from a KSU campus, or an off-campus computer logged in to the Kent VPN. A form must be reviewed from a KSU campus or Kent VPN computer. (Request a VPN account from the Help Desk.)

Program coordinators, the IS Training Center, and the Help Desk can assist with use of this workflow. Contact <a href="mailto:istraining@kent.edu">istraining@kent.edu</a> for help or training. Help notes are linked throughout the form, marked by the information icon:

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

It is recommended that you use these web browsers: Internet Explorer and Firefox for PC computers, Safari for Apple Macintosh computers.

After January 1, 2010, please submit new course forms, updates, and inactivation via the new workflow form. Requests begun on paper forms that are in process on this date may be completed on paper, or you may transfer requests to the online form to speed processing.

Contact Curriculum Services or your program coordinator if you have questions about course update policies or if you need to be set up as an approver or proxy for this workflow. Also notify Curriculum Services immediately if your role as a workflow approver changes.

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# **Workflow Approval Processes**

#### **Kent Campus Course Approval Process**



#### KSU Regional Campus Course Approval Process



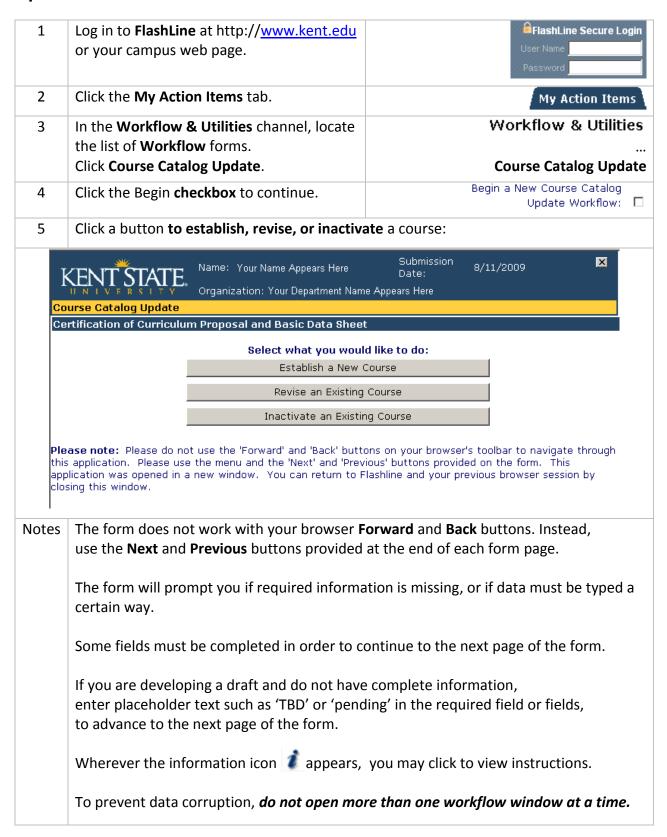
<sup>\*</sup>Courses with special attributes such as Kent Core, WIC, etc. are reviewed by the University Requirements Curriculum Committee.

#### **Workflow Roles and Communication**

Individuals in the Role of:	Will receive the following confirmations/notifications:
Initiator	<ul> <li>On-screen confirmation message upon submission of a form.</li> <li>E-mail confirmation after submission of a form.</li> <li>E-mail notification if a form is returned to you for edit         <ul> <li>the form will appear in your Worklist.</li> </ul> </li> <li>E-mail confirmation when a form is completed or denied.</li> </ul>
Approver	<ul> <li>On-screen confirmation message upon submission of a form.</li> <li>E-mail notification if a form is returned to you         <ul> <li>the form will appear in your Worklist.</li> </ul> </li> <li>E-mail notification if another approver has returned the form to the initiator.</li> <li>E-mail confirmation when a form is completed or denied.</li> </ul>
Proxy	No notifications. Check the Worklist regularly.

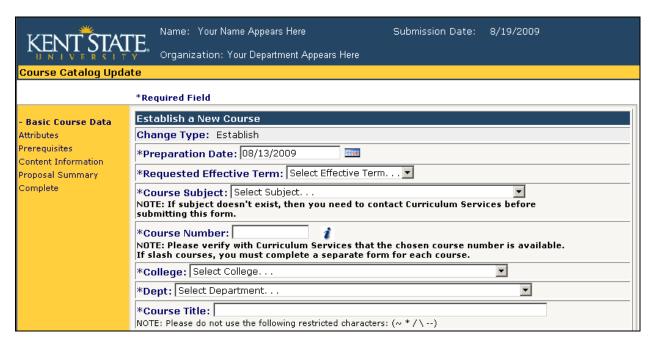
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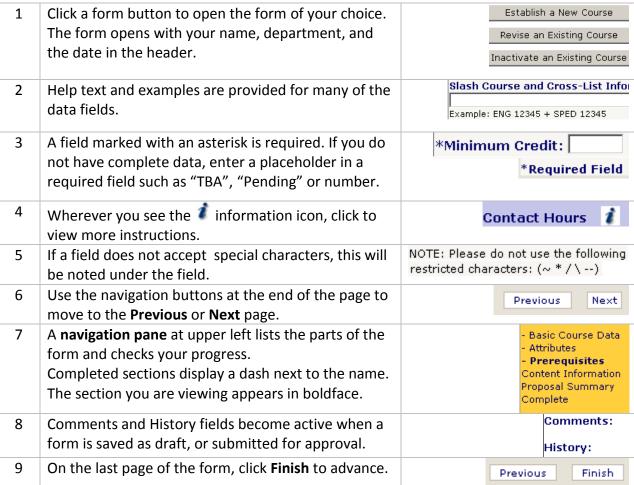
#### **Open a New Form**



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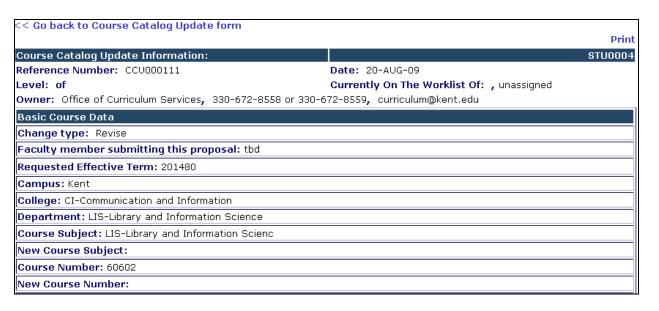
#### **Complete A Form**





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#### **Print and Submit a Form**



9	Clicking <b>Finish</b> opens a Final version of the fo which provides some useful features.	rm as above,		
10	You can easily review the form data, but you cannot edit. Select the <b>Go back</b> link at upper left to return the editable form.	<< Go back to Course Catalog Update form		
11	Click <b>Print</b> at upper right to print the form.	Print		
12	The longer forms, <b>Establish</b> and <b>Revise</b> , have the option <b>Save as Draft</b> . (Inactivate does not.)	Save As Draft Proceed		
13	A form that is saved as draft will display a note at the top with its reference number. You may close the workflow window and open the draft later	Document Saved As Draft. The reference number for this catalog update request is CCU000903		
14	Click <b>Proceed</b> on the Establish or Revise form, or <b>Next</b> on the Inactivate form; to get the Comments field.	Comments (250 Character Maximum):  NOTE: Please do not use the following restricted characters: (~ * / \)		
15	Click <b>Submit</b> to send the form on for approval.	Submit		
16	A confirmation displays. Click X in the upper right corner to close the form.	X		
17	Stop Workflow 'freezes' a form. It will not proceed, nor will you be able to revise it. Use this to cancel a form that is in process.	Stop Workflow		

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# **Print to PDF**

1	The option to <b>Print</b> a form will appear on the Comment page, which is the final page of a form.	Print
2	The Print button opens your browser print dialog.  If you have Acrobat Professional installed, the <b>Adobe PDF</b> option will be available.	Select Printer  Add Printer  Adobe PDF  Dell Laser Printer 5210n
3	Specify other print options and click Print.	Print

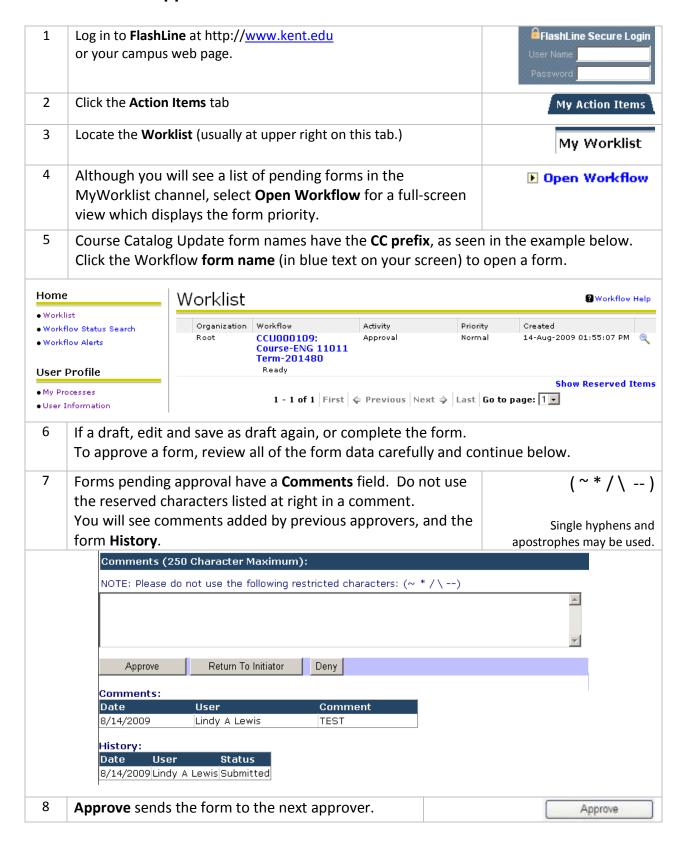
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# View the Status of a Submitted Form (Historical View)

1	Log in to <b>FlashLine</b> at http:// <u>www.kent.edu</u> or your campus web page.	FlashLine Secure Login  User Name  Password
2	Click the <b>Action Items</b> tab	My Action Items
3	In the <b>Workflow &amp; Utilities</b> channel, locate the list of <b>Workflow</b> forms.	Workflow & Utilities
	Click Course Catalog Update.	Course Catalog Update
4	Click the blue linked text to <b>search for historical Workflows</b> .	Click here to search for historical Catalog Update Workflows.
5	Type search criteria into one or more fields.	Course Title:
	For example, type part of the course name, using % as a wild card character.	%foundations
6	You may select the type of action from the menu list provided.	Action: Select Action Select Action
7	You may specify a range of dates to search only forms initiated in that time period.	Start Date Range: (mm/dd/yyyy)  End Date Range: (mm/dd/yyyy)  Su Mo Tu We Th Fr Sa   26 27 28 29 30 31 1   2 3 4 5 6 7 8   9 18 11 12 13 14 15   16 1 Monday, August 03, 2009
8	Every time you save a form, the form's Workflow Name displays. This also appears in confirmation emails and on printed copies of the form.  Use this name to instantly locate the form.	Workflow Name: CCU000903
9	Click <b>Search</b> .	Search
10	Search results appear in a list beneath the search form. Click <b>Select</b> to open a form.	Select
1 rec	ord(s) found.  ID Name	Current State Running Start Stop
Sele		
11	A form view appears. The name of its current worklist owner is visible.	Currently On The Worklist Of: Sommers, Marcella
12	You may print the form, or return to the Search Results to look up another form.	Course Catalog Update << Return to Search Results

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#### Edit a Draft or Approve a Form



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#### Course Catalog Update Workflow

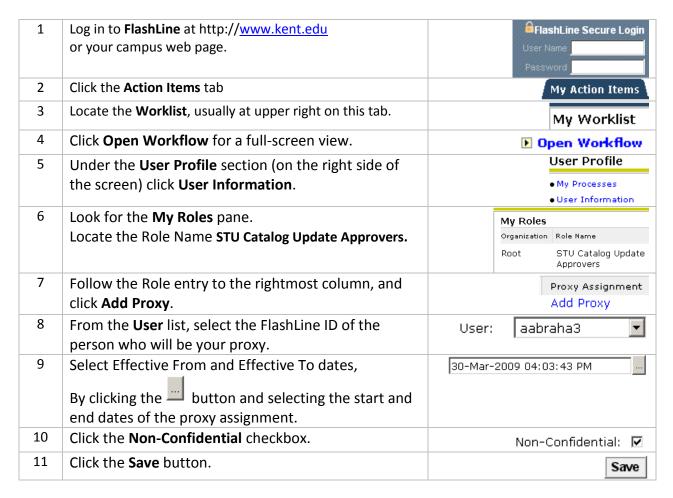
9	To request changes or corrections, add a Comment to explain, and click <b>Return To Initiator</b> or <b>Return to Approver.</b>	Return To Initiator Return To Approver
	(Second-level approvers have the options Return to Initiator or Return To Prior Approver.)	
10	The Deny button is used to deny a form. Add a Comment to explain.	Deny
	Deny will also stop a form which is not needed. The form will not return to the initiator, nor will it pass to the next person in the workflow. A stopped form is viewable in the historical view.	
11	Confirmation of your action appears on the screen.	You have successfully approved this Course Catalog Update.

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#### **Delegate Work to a Proxy Approver**

- Only an approver can enable or disable his/her own proxy assignments.
- Proxy changes must be made from a KSU campus or Kent VPN computer.
- If the person you wish to designate does not have access to this workflow, access must be requested plan ahead, as access requests take time to process.
- Your proxy will not receive any e-mail notifications. They must check **My Worklist** often to see and process workflow forms.
- Complete the work waiting in your Worklist, as your proxy sees only new submitted forms.

Contact the Help Desk at 330 672-4357 to request a VPN, or Virtual Private Network account.



#### **Cancel a Proxy Assignment**

1	To cancel an assignment before the designated date, log in as above. Under <b>My Proxies</b> , checkbox the assignment you wish to delete.		My Proxies		
			User	Role	
			awymer	STU Catalog Update	
				Approvers	
2	Click the <b>Delete Selected Proxies</b> button.	Delete Selected Proxies			
				NZ.	

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#### **How Work is Shared Between Approver and Proxy**

Approvers designate at least one individual to be a 'proxy-in-waiting'. Your proxy is given the access needed to approve a form, but your proxy is not enabled in the workflow, and will not see work unless you, the approver, allow it.

The Approver enables or disables the proxy by following the instructions on the previous page. As soon as a proxy is enabled, he/she will see **new** forms which appear in the Worklist.

A proxy cannot see older forms in process that already appear on the Approver's Worklist.

Here is what approver and proxy see and do. (Examples below use Grade Change WF names.)

Situation	Approver Sees	Proxy Sees
The normal, everyday working	Worklist	Worklist
arrangement.	Organization Workflow  Root GCD000065; Caurse-ANTH 90001 999 (RN-20215 Term-Fall 2008 Ready	Organization Workflow
The proxy is not enabled, and cannot see forms.	Root GCD00055: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Root GCD000062: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Roady	
The Approver enables a	Worklist	Worklist
person as proxy.	Organization   Workflow     Rept   GCD000065; Course-ANTH 90001     999 CRN-20215 Term-Fall 2008     Ready	Organization Workflow  Root GCD000065; Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready
Both receive forms and can do work.	Root GCD000055: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready Root GCD000062: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008	Root GCD000055: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Root GCD000062: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Roody
The approver has opened and	Worklist	Worklist
closed a form, 'claiming' it. (Performing appears under the form title.) The proxy can no longer see	Organization Workflew GCD000065: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready GCD000055: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready GCD000062: Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Parfamence	Organization Workflaw Ract GCD000065: Course-ANTH 9000 1 999 CRN-20215 Term-Fall 2008 Feady Ract GCD000055: Course-ANTH 9000 1 999 CRN-20215 Term-Fall 2008 Feady
the form.	•	
The Approver has released	Worklist	Worklist
the form and it is available to both.  (Ready appears under the	Organization Workflow  Root GCD000065; Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready GCD000055; Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready GCD000062; Course-ANTH 90001	Organization Workflow  Root GCD000065; Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready  Root GCD000055; Course-ANTH 90001 999 CRN-20215 Term-Fall 2008 Ready  Rood GCD000062; Course-ANTH 90001
form title.)	999 CRN-20215 Term-Fall 2008 Ready	999 CRN-20215 Term-Fall 2008 Ready

# Release a Form to Your Colleague

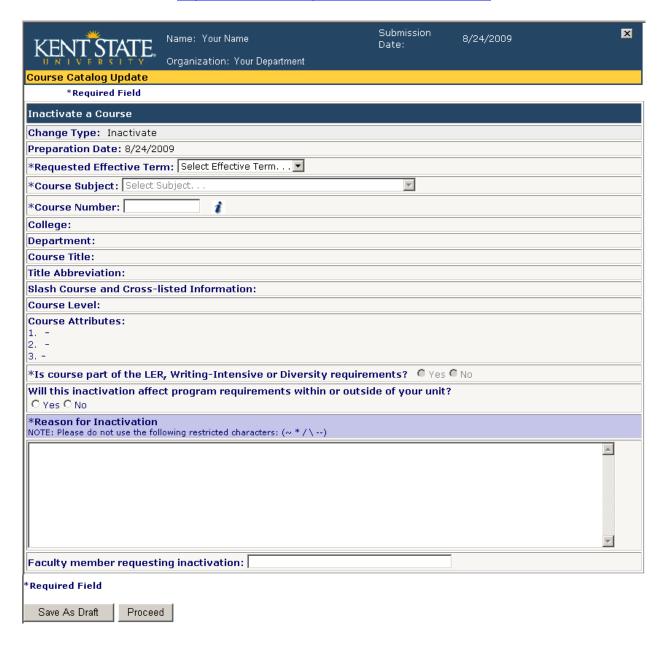
When one person opens a form, it vanishes from the Worklist of the other person.		
Either complete the form, or release the form to your workflow colleague.		
Click the magnifying glass icon seen in the rightmost column of the Workflow	(2)	
item listing. The Details screen will open.		
Click the <b>Release</b> icon. Now both individuals will see the form.	Release	

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#### Form Reference: Inactivate A Course

See the University Curriculum Guidelines available at

http://www.kent.edu/provost/curriculum/index.cfm



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#### Form Reference: Establish/Revise A Course - Basic Course Data

See the University Curriculum Guidelines available at <a href="http://www.kent.edu/provost/curriculum/index.cfm">http://www.kent.edu/provost/curriculum/index.cfm</a>

KENT STA	TE. Name: Your Name	Submission Date:	8/24/2009	×
Course Catalog Upda	Y Organization: Your Department			
	*Required Field			
- Basic Course Data Attributes Prerequisites Content Information Proposal Summary Complete	Establish a New Course Change Type: Establish  *Preparation Date: 08/24/2009  *Requested Effective Term: Select Effective Term: Select Effective Term: Select Effective Term: NOTE: If subject doesn't exist, then you need to submitting this form.		um Services before	
	*Course Number: NOTE: Please verify with Curriculum Services th If slash courses, you must complete a separate			ble.
	*College: Select College		▼	
	*Dept: Select Department		V	
	*Course Title: NOTE: Please do not use the following restricted chara	cters: (~ * /\)		
	*Title Abbreviation:  NOTE: Maximum 30 spaces, with no punctuation forward slash "/" is allowed with no spaces bef	or special chara ore or after the s	cters (e.g., &); except lash.	tion:
	Slash Course and Cross-List Information:	i		
	Credit Hours (e.g., 3 to 3 credits, 1 to 12 credits, 2 or 4 credit	rs)		
	*Minimum Credit: * C to C or *	Maximum Credi	t:	
	Contact Hours  NOTE: You must select at least one category. (Should be per week; can divide among lecture)	(lab/clinic, if appl	licable)	
	Lecture			
	Minimum Hours: Cto Cor Max	imum Hours:		
	Lab			
	Minimum Hours: Cto Cor Maxin	mum Hours:		
	Other (e.g., Clinic, Practicum, Internship, Research, Stu	ıdio, Individual II	nvestigation, etc.)	
	Minimum Hours: C to C or Maxi	imum Hours:		
	*Required Field			
				Previous Next

Comments:

History:

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# Form Reference: Establish/Revise A Course – Attributes

See the University Curriculum Guidelines available at <a href="http://www.kent.edu/provost/curriculum/index.cfm">http://www.kent.edu/provost/curriculum/index.cfm</a>

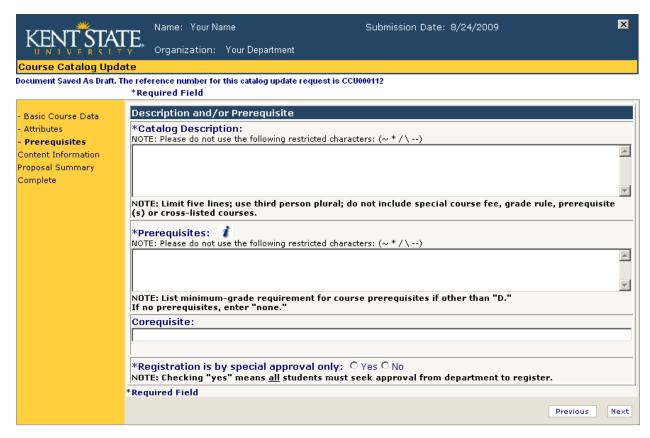
KENT STAT	Name: Your Name	Submission Date:	8/24/2009	×
Course Catalog Upda Document Saved As Draft. T	Organization: Your Department  Ite  The reference number for this catalog update request is C  *Required Field	CU000112		
- Basic Course Data - Attributes Prerequisites Content Information Proposal Summary Complete	*Is this course part of the Liberal Education Writing-Intensive (WIC) or Diversity requing *Can this course be repeated for credit?  *Course Level: Select Course Level  *Grade Rule: Select Grade Rule  *Schedule Type(s): You can choose more select Schedule Type  Select Schedule Type  Select Schedule Type  *Credit by Exam: Select Credit by Examination *Required Field	rements? © Ye © Yes © No	` ''	
Comments: History:				

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#### Form Reference: Establish/Revise A Course - Prerequisites

See the University Curriculum Guidelines available at

http://www.kent.edu/provost/curriculum/index.cfm



Comments:

History:

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#### Form Reference: Establish/Revise A Course – Content Information

See the University Curriculum Guidelines available at

http://www.kent.edu/provost/curriculum/index.cfm

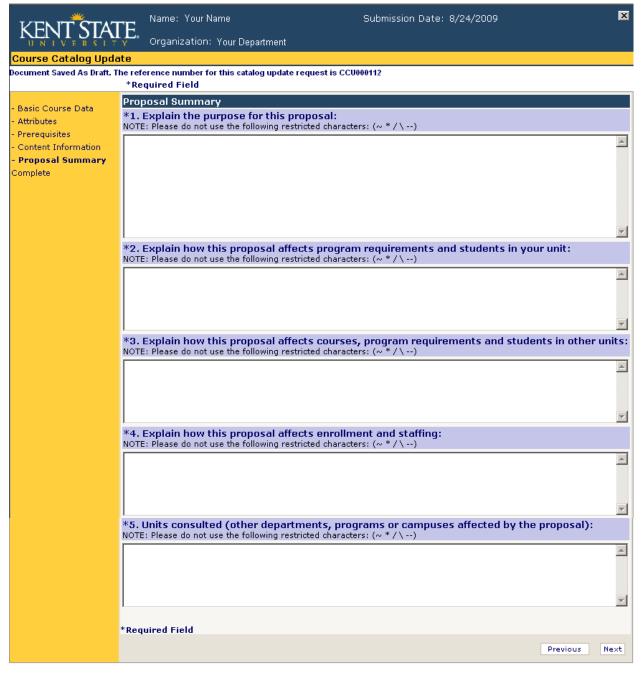
	Name: Your Name Submission Date: 8/24/2009			
KENT STAT	Drganization: Your Department			
Course Catalog Unda	· · · · · · · · · · · · · · · · · · ·			
Course Catalog Update Document Saved As Draft. The reference number for this catalog update request is CCU000112				
	*Required Field			
- Basic Course Data	Content Information			
- Attributes	*Content Outline (include contact hours for each content topic):			
- Prerequisites	NOTE: Please do not use the following restricted characters: (~ * / \)			
- Content Information	Contact Hours per Topic Description:			
Proposal Summary Complete				
Complete	Add			
	Build your content outline using the content outline wizard. Enter contact hours and a contact description. Click Add.  Content Outline:			
	Content Outline.			
	Display/Hide Delimited Course Outline			
	*Total Contact Hours:			
	*Textbook(s) Used in this Course:  NOTE: Please do not use the following restricted characters: (~ * / \)			
	<u> </u>			
	*Writing Expectations:  NOTE: Please do not use the following restricted characters: (~ * / \)			
	_			
	*Instructor(s) Expected to Teach:   NOTE: Please do not use the following restricted characters: (~ * / \)			
	The East and the Case the following resultances and account ( ) / / /			
	*Instructor(s) Contributing to Content:			
	NOTE: Please do not use the following restricted characters: (~ * / \)			
	<u></u>			
*Required Field				
	Previous Next			
Comments:				
History:				

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#### Form Reference: Establish/Revise A Course - Proposal Summary

See the University Curriculum Guidelines available at

http://www.kent.edu/provost/curriculum/index.cfm



Comments:

History:

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# Form Reference: Establish/Revise A Course – Complete

See the University Curriculum Guidelines available at

http://www.kent.edu/provost/curriculum/index.cfm

KENT STA	Name: Your Name Organization: Your Department	Submission Date: 8/24/2009	×	
Course Catalog Update				
Document Saved As Draft. The reference number for this catalog update request is CCU000112  *Required Field				
- Basic Course Data - Attributes - Prerequisites - Content Information - Proposal Summary	Faculty member submitting this prop	posal:		
- Complete		Previous	Finish	
Comments:				

History:

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