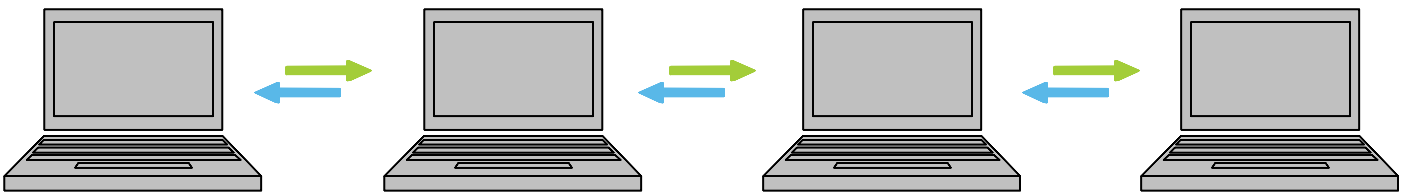
Program of Study User Document

Overview

Here is the basic flow of information through the application/workflow.



Create Request **Search Request** **Report Request** **Submit to Workflow**

In phase 1, we are collecting program data. We are in the “Save, Share, & Review” mode. You will

- Create Program of Study Request *(Save)*,
- Search for Request *(Share)*,
- Generate Cognos Reports *(Review)*.

During this phase, we are getting the program data into a correct & complete format – ready for entry into Banner. Only the originator and department chair (& their proxies) can actually edit the request form at this time. All other faculty & staff can look at the request, but can only add notes & attachments to it.

In phase 2, we are submitting the request forms to workflow. During this phase we are

- Collecting approvals,
- Creating an audit trail of changes,
- Entering the program data into Banner.

The workflow product will send the request forms to department chairs, curriculum committees, college deans, etc. They will get final approval from the UCAP or Graduate Studies committee. Finally, the program info will be entered into the Banner by the registrar office.

Notes:

Introduction

The services provided in the Course Inventory Management site have been developed initially to support the conversion of the university's course inventory from a quarters-based to a semesters-based curriculum.

Authentication

Each time you make a Program of Study Request, you will be logging on with your CAMPUS account (w001xyz, password).

Program of Study Request

This service is provided to

- initiate a new program request,
- request a modification to an existing program,
- request that an existing program be inactivated,
- create a quarter-to-semester conversion.

The quarter to semester conversion will be the most common operation at this time. You will be selecting the current program from existing Banner information and adding this information to the form. Next (and most important) scroll to the bottom of the form and attach the revised Program of Study. If you do not have the official Program of Study template, just click on the "Get Template" link to download it. Notice that each form has a unique Form ID and Form Status.

Program of Study Search

Use this service to search for a Program of Study Request. Typically this service would be used to review a program request that has been *saved* or *submitted* and is still "inprocess". The *Approvals* section of the form can be used to check where an in-process program request is in its workflow route. This service may also be used to recall completed or rejected requests.

Program of Study Reports

Reports supporting Course Inventory Management are available via Cognos. Each college will have one

or more individuals that can run Cognos reports and distribute as needed.

Program of Study Workflow

Once a request has been submitted, it will go through the workflow process. The request will be routed to the Department Chair, College Curriculum Chair, College Dean, etc. During the approval process, the request may be edited by university policy committees. You will be notified by email of any changes to the request.

Notes:

Getting Started

This form is divided into several sections:

- The Client Info identifies the originator of this request.
- The Program of Study section is the program you are defining for entry into Banner.
- The Approvals section identifies the workflow path to collect request approvals.

You begin by selecting the Type of Request.

- A New request is for an entirely new program, i.e., not based upon any existing Banner program.
- A Modify request is for modifying an existing semester program in Banner.
- An Inactivate request is for removing an existing program from Banner.
- A Quarter to Semester request is for converting an existing quarter program to a semester program. This will be the most common operation

Notes:

Type of Request Options

Description

- These are the possible operations on the form.

Options

- New – add a new program to Banner.
- Modify – modify an existing program in Banner.
- Inactivate – inactivate an existing program in Banner.
- Quarter to Semester – convert an existing quarter program into an equivalent semester program.

A New Request

- This would be a completely new program definition. It is not based on any existing Banner program. You will fill in the Program of Study section and add it to the form. Then, scroll to the bottom and attach the revised Program of Study to the form. Now, the form is in the state to save-n-share with colleagues.

A Modify Request

- You will be selecting the current program from existing Banner information. Add this info to the form. Then, scroll to the bottom of the form and attach the revised Program of Study. If you do not have the official Program of Study template, just click on the “Get Template” link to download it. Now, the form is in the state to save-n-share with colleagues.

An Inactivate Request

- This operation is for inactivating an existing program in Banner. You will select the current program from existing Banner information. Now, the form is in the state to save-n-share with colleagues.

A Quarter to Semster Request

- The most common request, at least, at this time. You will select the current program from existing Banner information and click the “Add” button to add the info to the form. Next (and most important) scroll to the bottom of the form and attach the revised Program of Study. If you do not have the official Program of Study template, just click on the “Get Template” link to download it. Now, the form is in the state to save-n-share with colleagues.

Notes:

Client Information Section

Description

- This identifies the originator of the request. Please fill in the reason for the request.

Notes:

Program of Study Section

Description

- This section identifies the current Program of Study. You will be selecting the current program from a series of drop-down boxes. In the Quarter to Semester case, you will select the quarter Program of Study, add this info to the form, then attach the semester Program of Study.

Task 1

- Select the Effective Term, e.g., Fall 2012 for quarter-to-semester conversion. Then, using the series of drop-downs, choose the current Program of Study. Note, the "Department" selection determines the workflow route through the departments & colleges. Try to communicate this information so the Registrar's office can completely and accurately enter the information into Banner.

Task 2

- Once you are done selecting the current Program of Study, simply click the **Add** button. Your information will be added to the form.
- Next (and most important) scroll to the bottom of the form and attach your revised Program of Study.
- *Note: If you do not have the official Program of Study template, just click on the "**Get Template**" link to download it.

Task 3

- If you need to change the current Program of Study information, simply click on the **Edit** button. The information will be placed back into the edit area. You can then change the information you want, and then click **Update**. The updated information will be placed into the form.
- If you need to change the revised Program of Study, i.e., the attached Program of Study. Click on the **Attach** button. Then, click on the word icon to download the document. Next, make your changes to the revised Program of Study, then re-attach the file to the form. Note, only the owner of an attachment can delete it.

Notes:

Download Template

Description

Overall, you want to attach a template to your Program of Study form. You will download the template to your computer. Then, with Microsoft Word, you will be completing the template. Finally, you will click the Attach button at the bottom on the request form to attach the template to your request form.

Task 1

- Click on the **Get Template** link and open it with Microsoft Word.
- Within Word, save the template onto your computer into **My Documents**.
- Now, fill out the template and save it.

Task 2

- Next, go back into your Program of Study form.
- At the bottom of the page, click on the **Attach** button.
- **Browse** for your saved Word Document in **My Documents**.
- Click on the **Attach File** button to add the template to your request form.

Notes:

Approvals

Description

- The approvals section lists the approvals that the form will go through. This is the workflow path the form will take through the university. Normally, it will go to the department chair, college curriculum committee, to the dean, then onto the UCAP committee, and etc. You will submit your request to the workflow by clicking the **Submit** button.

Notes:

Form buttons & links

Description

Finally, at the bottom of the form are the buttons you will use to take action on this form.

Task 1

- The **Submit** button submits your request form to the workflow process. The form will go through the approval process. When the last approval is collected, the information will be officially entered into Banner.

Task 2

- **Notes** & **Attach** buttons: Simply click on these buttons to add notes & attachments to your form. This information can be added to the form at any time during the process. Anyone can search for your form and add notes & attachments. The attachments can be any type of document (word, excel, jpg, etc). Of program, the most important attachment is the revised Program of Study.

Task 3

- **Save** button: Click on the **Save** button to put the form in a "save-n-share" state. The status of the form will change into the save state. You can click on the **Share with a colleague** link to share the information with others. When you select this link, your default mail client (Thunderbird, Outlook, etc) will open. The body of the email will have a direct link to this form so others can comment on your request.

Task 4

- **Cancel** button: This button will remove your request entirely from the system. Mistakes will be made and this is a way to remove them from the system. This form will be removed and not viewable by anyone.

Notes:

Save & Share

Save & Share are actions you take on the request form, but it has more to do with the business process. The process of collecting all this catalog information, getting it through the approval process, and finally entered into Banner. With the **Save & Share** concept, we are trying to get the data complete & correct right up front.

Click on the **Save** button to put the form in a "save-n-share" state. The status of the form will change into the save state. You can click on the **Share with a colleague** link to share the information with others. When you select this link, your default mail client (Thunderbird, Outlook, etc) will open. The body of the email will have a direct link to this form so others can comment on your request.

In the **Save & Share** state, others can add Notes & Attachments to your request. The Department Chair & proxies can actually make changes to the request form. Also, this is a good time for the Department Chair to run Cognos reports to get a “complete” view of all the programs the department is offering. These reports can be distributed (email, print, etc.) to committee members for review. Contact your college Cognos representative to produce these reports or the Administrator kitty.friedman@wright.edu

Finally, once the Program of Study forms are complete & correct, the SCT Workflow product will be enabled. You will click the **Submit** button to send your request form to the workflow process. The form will go through the approval process – Department Chairs, Curriculum Committees, Deans, etc. When the last approval is collected, the information will be officially entered into Banner.

Notes: