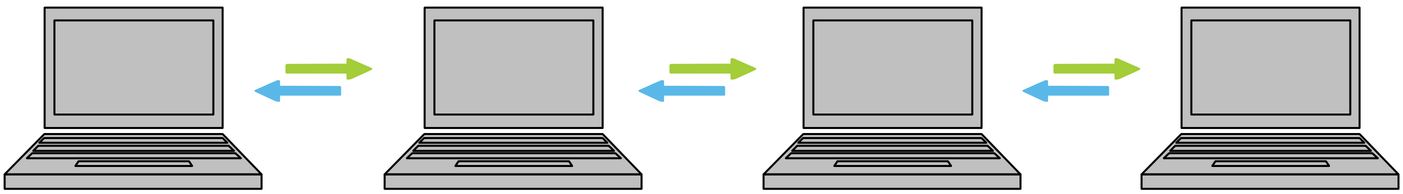
Course Inventory Request User Document

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 semester data. We are in the "Save, Share, & Review" mode. You will

- Create Course Inventory Request *(Save)*,
- Search for Request *(Share)*,
- Generate Cognos Reports *(Review)*.

During this phase, we are getting the semester data into a correct & complete format – ready for entry into the Banner catalog. 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 semester data into the Banner catalog.

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 semester courses will be entered into the Banner catalog 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 course inventory request you will be logging on with your CAMPUS account (w001xyz, password).

Course Inventory Request

This service is provided to

- initiate a new course request,
- request a modification to an existing course,
- request that an existing course 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 finding current course information from the existing Banner catalog. You will copy this information into the revised section, change the revised information, and add it to the form. Notice that each form has a unique Form ID and Form Status.

Course Inventory Search

To search the course inventory management database for course requests. Typically this

service would be used to review a course 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 course request is

in its workflow route. This service may also be used to recall completed or rejected requests.

Course Inventory 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.

Course Inventory 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:

Type of Request Options

Description

- These are the possible operations on the form.

Options

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

A New Request

- This would be a completely new course definition. It is not based on any course in the existing Banner catalog. You will fill in the revised section and add the course to the form. Now, the form is in the state to save-n-share with colleagues.

A Modify Request

- You will be finding current course information from the existing Banner catalog. You will copy this information into the revised section, change the revised information, and add it to the form. Now, the form is in the state to save-n-share with colleagues.

An Inactivate Request

- This operation is for inactivating an existing course in the Banner catalog. You will find current course information from the existing Banner catalog. 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 find one-or-more quarter courses from the existing Banner catalog. You will copy this information into the revised "semester" section, alter the information to define your semester course, and add it to the form. 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:

Current Course Information Section

Description

- This is the current course you will find in the existing Banner catalog. Quarter to semester case: you will be looking up (1 or more) current quarter courses that are going to be mapped into a semester course.

Task 1

- Finding a current course: fill in (all or partial) criteria... subject, course range (300 to 400), partial title, etc. Click the **Find** button. You will be taken to a page of results. Simply click on the course you want. It will be added into the request form.
- You can do another find to add any number of current courses to the form.

Task 2

- If you select the wrong course, simply delete it from the form.

Task 3

- The **Copy** button is for copying the current information into the revised section of the form. This is for convenience, just so you don't have to enter all the revised information.

Notes:

Revised Course Information Section

Description

- This is the revised definition of the course. You will be editing this information. Quarter to semester case: You will be editing your semester course. You will choose fall 2012, change the course number, etc.

Task 1

- Enter all of the information. This is some help for the enrollment restrictions & prerequisites. 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 entering the course information, simply click the **Add** button. Your revised information will be added to the form.
- *Note: click on Get **Template** if you need the syllabus template. At the bottom of this page, you can attach the syllabus to this request form.

Task 3

- If you need to change the revised information, simply click on the **Edit** button. The information will be placed back into the revised edit area. You can then change the information you want, and then click **Update**. The updated information will be placed into the form.

Task 4

- In the edit area, you will see some special controls (co-requisite courses, cross listed & special fees). These are somewhat optional. If you need them, fill out each section then click **Update** to put the information into the form.
- Note: each control works the same
- The **More** link gives you more rows to enter data
- The **Validate** link validates the information in the control

Notes:

Download Template

Description

Overall, you want to attach a template to your course inventory request 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 Course Inventory Request 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 the Banner catalog.

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 course, the most important attachment is the syllabus for the course.

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 the Banner catalog. 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 courses 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 Course Inventory Request 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 the Banner catalog.

Notes: