Office of the University Registrar

Section Meeting Time & Location
Change Workflow

User Guide

August 2011
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1. Introduction

1.1 Purpose of the Workflow

This workflow allows Kent campus schedulers to request that changes be made to a section meeting time and/or location in Banner INB. The change request is routed to the Academic Scheduling Center to ensure that the change does not conflict with course combinations and student plans.

1.2 Workflow Functional Path

The academic department scheduler initiates the request by accessing the workflow from the ‘Course Section Maintenance’ channel within FlashLine.

The Academic Scheduling Center in the Registrar’s Office will process the request and will acknowledge the action taken by sending a workflow notification via email (indicating that the request was processed, processed with modifications, denied, returned-for-edit, or stopped).

1.3 Workflow Features

- Restricted to active, Kent campus sections in fall/spring terms that are Spring 2012 or later. Summer sections are exempt.
- Only schedulers will be able to access and submit requests.
- One can assign a proxy if necessary.
- Further filters are by Term, College, Subject, Course # and Section #.
- A Section and its MEET record(s), with the minimal fields of Start and End Dates, Schedule Type and Session Indicator, must be created in SSASECT prior to using the workflow. If not a message will be displayed instructing to create one in Banner.
- Schedulers can request changes for any combination of ‘Days of the Week’, ‘Time’ and ‘Location’ for each individual MEET record.
- The Meeting Time editor is set up to follow the existing Pattern meeting times.
- The Meeting Location editor can be searched by Building or Type of Room.
  - Select Type of Room to bring up a list of Buildings which meet that category.
  - Select Building to bring up a list of Types of Rooms which are in that building.
  - The optional Room field is filtered based on Building / Type of Room selected
- The Meeting Location editor includes a place to choose up to 3 room characteristics, if applicable, i.e., Whiteboard – 12 feet. Note: These characteristics are independent of the other Location fields.
• Requested changes are visible below the original record for easy comparison.
• Assigned Instructors are available for review in a collapsible window.
• Each edited MEET record requires a Change Reason to be completed.
• If the MEET record is part of a co-scheduled group, then the schedulers can list the corresponding CRN’s (Processors will then update all together in Banner).
• Schedulers can start a new Workflow request once they have submitted a prior one.
• Metrics on workflow – if workflow is on worklist of processor or initiator (for return-for-edit) for more than two days, it is flagged.
• High priority assigned on worklist to items where registration is occurring or is 30 days prior.
2. Access the Workflow

Log into FlashLine.

Click the tab [My Action Items]. Under [Workflow] click on [Section Meeting Time Location]

or simply click [Section Meeting Location] in the new [Course Section Maintenance] channel.

The workflow page opens. Note that the [Logout] button is at upper right. The [Help] link will open an online copy of this user guide. The [History] link enables you to search for forms that have been submitted. See section 7 for details.
3. Request a Change of Meeting Time or Location

3.1 Select the Section to be Changed

1. Select the appropriate Term for modification of Meeting Time and Location.
   Use the ‘List of Values’ (LOV button) to view and select.

   For our purposes, we will use Fall, 2011

   1. TAB (This will ‘activate’ the next field).

2. Select the College, using the Live of Values (LOV) button

   (we’ll use the ‘College of Arts and Sciences’)

   NOTICE, as selections are made, the next field for selection becomes available.
3. Select the **Subject**, using the List of Values.

4. Select the **Course Number**

5. Select the **Section Number**

6. Load the Information
   (Click on the Load Information button to pull up the data on this course and section.)
All of the current information will load, along with the ability to ‘Edit’ the record.

AREAS TO NOTE:

- **Part of Term**: Verify the Part of Term data is correct
- **Edit button**: Utilized to make changes to the meeting data
- **Instructor**: The instructor(s) currently assigned to the section may be viewed by clicking on the ‘search’ icon. This will allow the information to display.

Clicking on the search icon when the instructor(s) data is displayed will once again hide the information.

- Note the **Course Number, Section # and CRN** in the Banner of the Meeting data.
3.2 Change the Meeting Time and Location

1. Click on the ‘Edit’ button located in the course table.

The data fields will ‘open’ allowing the Scheduler to edit the information.

**Notice** how the Days of Week check boxes appear, the Time and Location also will be hyper-linked allowing the Scheduler to access possible times and locations.

2. To change the Meeting Day(s), select new Meeting day(s) by clicking the checkbox(es).

   From Tue / Thu
   
   To
   
   Mon / Wed

   Eliminate the previously selected days by clicking the check box to reverse the selection.

3. Save the Edit
4. When the Edit has been ‘Saved’ the data screen will display the original record and will prompt the Scheduler to provide a reason for the requested change.

ITEMS TO NOTE:

a. Any fields with a red asterisk (*) are REQUIRED fields.

b. The change may be undone.

c. Select the reason for the change AND include a narrative explaining why.

d. Indicate if this section / CRN is part of a co-scheduled group.

NOTE: The header in the Change Reason for Meet box identifies the ‘Record’ that is being edited. In this case it is 1, since there is only one delivery type. In other examples to follow, you will see how this changes.
3.3 Submit the Request

When the Change Reason is completed, the Submit Request button becomes active. Click the ‘Submit Request’ button.

![Change Reason for Meet Record 1]

A confirmation message will display:

![Your request has been submitted successfully]

To request another section meeting time or location change, click ‘Start a new Request’.
4. Working with Co-Scheduled Groups

When requesting a change to Co-Scheduled groups, **only one work flow form** is submitted. The Scheduler will include the additional CRN’s as part of the information in the Reason for Change.

Below is an example of a Co-Scheduled course:

```
<table>
<thead>
<tr>
<th>Course Number: NURS 20030</th>
<th>Section #: 001</th>
<th>CRN: 22466</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>End Date</td>
<td>Days of Week</td>
</tr>
<tr>
<td>-----------</td>
<td>----------</td>
<td>---------------</td>
</tr>
<tr>
<td>28-AUG-11</td>
<td>11-DEC-11</td>
<td>Mon Tue Wed Thu Fri Sat Sun</td>
</tr>
<tr>
<td>29-AUG-11</td>
<td>11-DEC-11</td>
<td>X</td>
</tr>
<tr>
<td>30-AUG-11</td>
<td>11-DEC-11</td>
<td>X</td>
</tr>
</tbody>
</table>
```

The meeting DAY for the lab is going to change from Tuesday to Thursday. This section is co-scheduled with Sections 003 and 011.

1. Obtain the CRN’s for each section.
   - CRN’s may be obtained through Banner
   - CRN’s may be obtained using This work flow

2. Edit the appropriate session

3. Save the Edit.

4. When the Edit is saved, the Change Reason box will open. Complete the fields.

*Note that this example is for Meet Record 3; which corresponds to number 3 in the Course Data table shown above.*
5. Indicate that this is part of a co-scheduled group.

When ‘Yes’ is selected, another field will open, allowing the Scheduler to list all CRN’s that are part of the co-scheduled group.

6. Enter all CRN's that are part of the Co-scheduled group.
   (These should have been identified PRIOR to beginning this process.)

   **NOTE:** When listing multiple CRN’s separate them by using commas.

   ALL members of the group will be updated as part of this workflow IF THEY HAVE BEEN IDENTIFIED IN THE LISTING.
7. Submit the Request.

The Workflow request may be reviewed upon submission.

If any changes need to be made, note there is an ‘Undo Change’ button.

5. Request a Room/Building Change

In the event a new room is needed, the Scheduler should

- Locate a room that has the appropriate capacity
- Request the change via the workflow.

If the room does not have the appropriate capacity for the section selected, an error message will present, and the change cannot be saved.

1. Access the section information.
2. Select the Edit button to make the room change.
3. Click on the ‘Location’ link. In this example, it’s the Library (LIB)

The Meeting Location form will present.
4. Search by Building or by Type of Room by clicking on the appropriate radio button.

   In the example below, I’ve selected ‘Type of Room’. Those selection fields are now active and I can search accordingly.
5. When the type of room is selected, the ‘Building’ field will open for search, and the Scheduler may indicate the building.

6. The Room Number field will now open. **NOTE:** Selecting a room number is optional.

Any rooms that meet the “Type of Room” and “Building” requirements will be displayed.

7. If all information has been entered, click on the ‘Apply Changes’ button, and the data will be changed for the record; and the changes will display on the Meeting Times and Locations Change form.

4. **Save the Edit.**
6. Request Specific Room Characteristics

If the Scheduler is going to allow Time Tabling to select the room, BUT they have certain specs needed in order for the class to meet, those may be entered through the ‘Room Characteristics’ field.

1. Access the section information.
2. Select the **Edit** button to make the room change.
3. Click on the ‘**Location**’ link.
4. Determine if you are searching by Building or Room.
5. Select the desired Building, and the desired type of room
6. Enter up to three (3) room characteristics

a. At the field for Room Characteristics, click on the ‘Add’ Button. This will activate the field in order for selections to be made.

b. Use the search function to view the list of characteristics.
   Scroll to view additional characteristics.

c. Click on the desired characteristic to select it.
d. To add additional characteristics, click on the ‘Add’ button. This will open another characteristics field.

![Meeting Location Form]

Select Building and Room Type.

Make the appropriate selection.

f. When all characteristics have been selected, Click on the ‘Apply Changes’ button.

7. On the Meeting Times and Locations form, Save the Edit.

8. Complete the Change Reason.

9. Submit the workflow request.

**NOTE:** Room Characteristics may be removed. However, they will remove starting from the bottom of the list and moving upward, and they must be removed one at a time.
7. View Workflow Forms

7.1 The My Worklist View

Log in to FlashLine and click the tab My Action Items. Under My Worklist, click Open Workflow for a full-screen view.

Look in the Activity column to determine whether a request has been returned for edit.

7.2 The Workflow History View

1. Log in to FlashLine and click the tab My Action Items.

2. Click the tab My Action Items. Under Workflow, click on Section Meeting Time Location or click Section Meeting Location in the new Course Section Maintenance channel.

3. The workflow will open. Click History found at the upper right on the screen.

4. Workflow Search appears. If you do not wish to search for a form, click Back.
5. To search by a form **name**, type any part of a course name or workflow ID number, using the percent sign % as a wildcard.

6. To search by **date**, specify either a range of dates during which the request was **started**, or a range during which the request was **completed**. Don’t search by both.

   ![Calendar Image]

   The date tool automatically helps you select the range. Click the calendar icon to begin. Click on a date to indicate the **start of your date range**. Below, we’ve clicked August 8, 2011.

   *Initially the Start Date Range field will display the same date twice.*

   ![Calendar Image with Start Date Range]

   The calendar remains open for you to click on a **second date** to indicate the end of the range, such as August 12, 2011, above. The calendar will close and the Start Date Range field will display both dates that were clicked:

   ![Calendar Image with both dates selected]

7. To search by form **Status**, select a status from the menu.

8. Note that you can search by a single criteria, or **none at all**.

   Click ![Search Button] or clear the search with ![Reset Button].

9. Search results will display beneath the Search fields. Click a Workflow **name** to open the form.
10. In History view, a header section highlights the form Comments, Details, and user action History.

![Workflow History](image)

11. Scroll down to view the changes. Click [Instructor](button) to view the instructor name(s).

![Meeting Times and Locations](image)