Office of the University Registrar

Section Title Change Workflow

User Guide

September 2010
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<th>Document Title</th>
<th>Section Title Change Form and Workflow -- User Guide</th>
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<tr>
<td>Issue Date</td>
<td>June 2010</td>
</tr>
<tr>
<td>Author</td>
<td>Phillis Steinbach, IS Technical Training</td>
</tr>
<tr>
<td>Copyright</td>
<td>Kent State University and SunGard Higher Education, 2009</td>
</tr>
<tr>
<td>Process Owner</td>
<td>Office of the University Registrar</td>
</tr>
</tbody>
</table>
| Get help with this process | Academic Schedule Center.  [acadschedctr@kent.edu](mailto:acadschedctr@kent.edu)  
IS Technical Training,  [istraining@kent.edu](mailto:istraining@kent.edu) |
| Get help with Workflow Access | Contact the Help Desk, 672-HELP (330-672-4357) |
| Get Documentation | This document and related documentation is available online at  
[http://www.kent.edu/is/training/documentation.cfm](http://www.kent.edu/is/training/documentation.cfm) |
SECTION TITLE CHANGE WORKFLOW

The use of this workflow will allow Schedulers to submit section-level title changes for a specific subset of courses electronically to the Registrar’s office for processing. Only Schedulers will be able to access and submit requests, however, a proxy may be assigned if necessary.

This workflow filters specifically on courses which end in %91, %93, %95, %97 and Geog 40292, 50292.

Accessing the Workflow

1. Access FlashLine using your FlashLine ID and Password

2. Select the “My Action Items” tab

3. Locate Workflow & Utilities
Accessing the Work flow (Cont’d)

4. Within *Workflow & Utilities* locate the “*Workflow*” channel, and search for “*Section Maintenance*.”

The Section Title Change Workflow will open, and present the Scheduler with the opportunity to either begin a New Section Title Change, OR to search for one already in progress or completed.

```
Name: Organization:
Section Title Change
```

```
Begin a New Section Title Change Workflow: [ ]
- OR -

Click here to search for Historical Workflow

NOTE: This form is for section title changes only. No other requests will be accepted.
```
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Create a New Section Title Change Workflow

NOTE: If Academic History such as grades published should exist for a course, Title Changes will not be allowed. Only current or future sections may have changes submitted.

1. Click in the BOX located to the right of option ‘Begin a New Section Title Change Workflow.’

2. You will have search parameters to indicate the term, campus, college, etc. As selections are made by the Scheduler, additional fields will be activated for selections. Use the ‘Search’ function (drop down), to view, then select your options.

3. Using the ‘Search’ function (drop down), select the appropriate ‘Term’ for the Title Change to be effective.

Create a New Section Title Change Workflow (Cont’d)

4. Select the appropriate campus for the section.

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5. Entering the ‘College’ is optional. An example of a ‘College’ would be ‘College of Nursing’, etc. (Entering the College will help in filtering One’s choices)

6. Enter the ‘Subject’. Use the search function to locate the appropriate subject. Note the subjects are in abbreviated Alphabetical order.

7. Once the Subject has been selected, the ‘Course Number’ should be entered. Use the drop down function to locate courses.

NOTE: Banner will filter specifically for courses which end in %91, %93, %95, %97 and Geog 40292, 50292.

Create a New Section Title Change Workflow (Cont’d)

8. Select the ‘Section’ which you want to change. Use the ‘search’ function to locate the section number.
NOTE: Once the section has been selected:
   a. the CRN associated with that section will auto fill,
   b. current section status will auto fill
   c. if available, the Primary Instructor and additional instructors will auto fill
   d. the current Section title will auto fill
   e. if available, any previous (historical) section titles will display at the bottom of the screen (based on the previous year’s information).

Create a New Section Title Change Workflow (Cont’d)

9. Enter the new section title in the “New Section Title” field. Do NOT use restricted characters.
IF one of the previous titles is to be re-used, it may be chosen by using the ‘Select’ button

10. If any additional comments are desired, such as a description of the course, those may be entered in the ‘Comments’ field.

11. Submit the Title Change by clicking on the ‘Submit’ button located at the bottom of the screen.

Create a New Section Title Change Workflow (Cont’d)

12. Confirmation of the submission will be presented for review, and may be printed if desired.
Note: the information includes the date and name of the person submitting the request in the History section.

Returned Workflow

Once the Workflow has been submitted, it will be forwarded to the appropriate area within the Registrar’s Office for review and processing in the Banner system.

If there is an issue with the title, or an error of any type, the processor will return the request to you for correction.
Those Workflows that are returned will be located in FlashLine > ‘My Action Items’ tab > ‘My Worklist’ section

<table>
<thead>
<tr>
<th>Organization Workflow Name</th>
<th>Activity</th>
<th>Created</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Root 201110-KC-CICOMM-46091-001 enCampus SMTCO000033 Performing</td>
<td>Processing</td>
<td>08-Jun-2010 03:18:37 PM</td>
<td></td>
</tr>
<tr>
<td>Root 201080-KC-ASPHIL-60191-001-22803 SMTCO000031 Ready</td>
<td>Processing</td>
<td>03-Jun-2010 02:18:52 PM</td>
<td></td>
</tr>
<tr>
<td>Root 200980-KC-CIJCMI-40095-016-17598 SMTCO000028 Performing</td>
<td>Processing</td>
<td>03-Jun-2010 02:17:01 PM</td>
<td></td>
</tr>
<tr>
<td>Root 201080-KC-ASJUS-37091-001-21682 SMTCO000030 Performing</td>
<td>Processing</td>
<td>03-Jun-2010 02:16:30 PM</td>
<td></td>
</tr>
</tbody>
</table>

### Page Definitions

#### Worklist Banner

**Organization**  Will always be identified as ‘Root’. This is not editable.

**Workflow Name**  Data name assigned to each individual workflow. Notice it will indicate the campus, college, course, section and CRN.

**Activity** Indicates activity related to the submitted workflow. It may be in the system being processed, or it may indicate it has been denied.

#### Page Definitions (Cont’d)

**Created**  The date and time the workflow was created

**Details**  A magnifying glass icon indicates there are details regarding the workflow. Click on the icon, and more information will be given regarding the title change.
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Found in the far right column. An Alert to indicate this is an item which has been sitting on the Processor’s worklist for more than 2 business days and needs immediate attention. For Schedulers, this will be seen if the Processor has returned the workflow to you for changes and it has been sitting on your worklist for more than 2 business days.

**Urgent**
Located under the Workflow Name column. This means changing the title is urgent. This needs to be processed ASAP

**Performing**
Located in the Workflow Name column. A status that indicates the workflow has been selected by the Scheduler and is being edited, or requested changes have been made, but not as yet submitted.

**Ready**
Located in the Workflow Name column. A status indicating the workflow has not as yet been selected for editing by the Scheduler. However, once it is selected, its status will change to performing.

**Bottom of the Worksheet**

**Refresh**
When selected, this will refresh the entire Worklist.

**NOTE:** The Worklist does NOT automatically refresh itself.

**Show Entire Worklist**
When selected, this opens the worklist in a different window view.

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**Page Definitions (Cont’d)**

**Open Workflow**
When selected this will open the Worklist, along with additional options the Scheduler may work with.
**Workflow Status Search**

Allows the Scheduler to search for a specific Workflow

**Workflow Status Search Results**

- Workflow Organization:
- Workflow Specific Name:
- Business Process Name:
- Definition Organization:
- Name and Version:
- Start Date:
- End Date:
- Status:

**Editing a Returned Workflow**

1. If an item has been returned to the originator, it will appear in the Worklist, and will be identified as having been “Returned For Edit”.
2. Select the item by clicking on the Workflow name. The complete Worklist will display.

![Worklist Image]

3. Click on the Workflow to be edited. The original Workflow form will open.

   An example is given on the following page.

---

**Editing a Returned Workflow (Cont’d)**

<table>
<thead>
<tr>
<th>Reference Number:</th>
<th>SMTC000016</th>
<th>Date:</th>
<th>21-JUN-10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow Status:</td>
<td>On the waitlist of [Redacted] at ReturnedForEdit activity since 06/21/2010</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Owner:</td>
<td>Office of the University Registrar, (330) 672-3131, <a href="mailto:acadschedctr@kent.edu">acadschedctr@kent.edu</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Term: 201110  
Campus: Kent Campus  
College: College of Comm and Info (CI)  
Subject: COMM (Communication Studies)  
Course Number: 65091  
Section Number: 001 CRN: enCampus  
Current Section Status: A  
Instructor(s): Primary - Primary instructor not assigned | Other(s): No instructors assigned  
Old Section Title: SEMINAR IN PERSUASION  
New Section Title: SEM: IS POWERPOINT OVERRATED  
Revise Section Title: 72 more characters
Items to pay attention to on this form:
A  The Banner field indicates this form has been *Returned For Edit*.
B  **Comments.** The Processor indicated the reason for returning this Workflow to the Scheduler.

**Editing a Returned Workflow (Cont’d)**

4. In the ‘Revised Section Title’ block, the Scheduler will make the necessary changes.
Notice the Old Section Title is shown, as is the New Section Title which was submitted by the Scheduler and then returned for edit.

The Revised Section Title is the one that will now be re-submitted for processing.

5. Submit for Processing by clicking the ‘Submit’ button.

## Historical Workflow

A search may be performed for historical workflows. Accessing this information is done through the Section Title Change main screen.
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1. Click on the line “Click here to search for Historical Workflow”.

2. The Search fields will open.

   2.1. If the Workflow Name is known, it may be entered. The Workflow Name is automatically assigned by the system at the time the Workflow is initiated. It will start with the prefix “SMTC” followed by several zeros and digits. Ex: SMTC000030.

   2.2. If the creation date is known, the start and end date range may be entered.

   2.3. All fields may be left blank and the search can be performed for ALL Section Title Changes submitted.

Historical Workflow (Cont’d)

3. The information retrieved in the example is a search for ALL Section Title Change workflows which have been submitted.
4. Locate the workflow you choose to review.

Click on the Select button. The details of the workflow will display.

Historical Workflow (Cont’d)

5. When finished reviewing the data, you can return to the Search Results by clicking on the prompt at the top of the screen.
Proxy

Schedulers should designate another department person who has the authority to create and submit Section Title Changes in the event they are out of the office. The Proxy, of course, must also have system access.

**Designate a Proxy Approver**

The Scheduler function may be delegated to another individual.

- Only the Scheduler can enable or disable a proxy.
- Proxy management must be done from a KSU campus or KSU VPN computer. Remember to do this before leaving the office. (Or request a VPN account from the Help Desk.)
- If the person you wish to designate as proxy does not appear on the User list (step 8) request access by sending an email to the Records Services mailbox at recrdsvc@kent.edu. **Do this several weeks in advance of your anticipated absence.**
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- Notify Registrar Records Services of any staffing changes that affect this workflow.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Log in to FlashLine at <a href="http://www.kent.edu">http://www.kent.edu</a> or your campus web page.</td>
</tr>
<tr>
<td>2</td>
<td>Click the Action Items tab</td>
</tr>
<tr>
<td>3</td>
<td>Locate the Worklist, usually at upper right on this tab.</td>
</tr>
<tr>
<td>4</td>
<td>Click Open Workflow for a full-screen view.</td>
</tr>
<tr>
<td>5</td>
<td>Under the User Profile section (on the right side of the screen) click User Information.</td>
</tr>
<tr>
<td>6</td>
<td>Look for the My Roles pane. Locate the Role Name <strong>STU Grade Change Approvers</strong>.</td>
</tr>
<tr>
<td>7</td>
<td>Follow the Role entry to the rightmost column, and click Add Proxy.</td>
</tr>
<tr>
<td>8</td>
<td>From the User list, select the FlashLine ID of the person who will be your proxy.</td>
</tr>
<tr>
<td>9</td>
<td>Click the ... button to select Effective From and Effective To dates for the proxy assignment.</td>
</tr>
<tr>
<td>10</td>
<td>Click the Non-Confidential checkbox.</td>
</tr>
<tr>
<td>11</td>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>

### Delete a Proxy Assignment

- To cancel an assignment before the designated date, log in as above. Under My Proxies, checkbox the assignment you wish to delete.
- Click the Delete Selected Proxies button.