

Electronic Course Substitution

These instructions detail the processes required for completing an electronic course substitution. This process is for undergraduate students only. Graduate students' course substitutions must still be submitted manually. Manual (paper) submissions for undergraduates will no longer be accepted. Advisors should instruct their advisees on their part in this process at the time of advisement.

Review this document as it pertains to your role in this process. For the full process instructions, review the full instruction set. Also, make sure to review the final the final page(s) for notes and special instructions.

Electronic Course Substitution

The electronic course substitution request should flow as follows:

1. Student meets with advisor regarding request.
2. Student submits request to advisor, electronically.
3. Advisor completes his/her activity, relating to the substitution request.
4. Process flows electronically from advisor to department chair.
5. Department chair completes his/her activity, relating to the substitution request.
6. Process flows electronically from department chair to dean.

Electronic Course Substitution (cont'd)

7. Dean completes his/her activity, relating to the substitution request.
8. Upon approval, process flows to the departmental administrative/executive assistant of the original advisor.
9. Administrative/Executive assistant completes the Banner related work by entering substitution information.
10. Upon completion, an e-mail notification is sent to the student informing him/her of the approval and completion of process of the request with a copy to all approvers and advisors.

Any denial of the request will result in an immediate e-mail to the student regarding the denial with a copy to all advisors and any previous approvers.

Electronic Course Substitution

The following subset of instructions detail how an administrative/executive assistant completes his/her portion of an electronic undergraduate student course substitution request.

File Message Developer

Ignore X Delete Reply Reply All Forward More Meeting Move to: ? To Manager Team E-mail Done Reply & Delete Create New Rules OneNote Actions Mark Unread Categorize Follow Up Translate Find Related Select Zoom

Delete Respond Quick Steps Move Tags Editing Zoom

From: adean@una.edu Sent: Wed 9/1/2010 11:13 AM
To:
Cc:
Subject: Course Substitution Request for Example Student

TO: deptassistant@una.edu

There has been a course substitution request that requires your attention. Example Student has submitted the request below.

Substitute Course: Substitute Course

FOR

All approvers and the final decision are noted here.

Required Course: BI 101

This request has been **approved** by the following individuals: An Advisor, Department Chair, A Dean

Comments: N/A

Please log into [UNAPortal](#) and click the Workflow tab and the related work item to open Banner and complete this task.

After the dean completes his/her activity, you (the assistant) will receive an e-mail similar to the above e-mail. Simply follow the instructions to complete your portion of the electronic course substitution process.

University of North Alabama

My Account
Content Layout
Portal Admin

Welcome
You are currently logged in.

E-mail Groups Admin Logout Help

MyUNAPORTAL University Calendar Tutorial Self-Service Banner **Workflow**

September 1, 2010

Personal Announcements
There are no announcements

Request Campus Announcement
To request a Campus Announcement Click here

UNA Live@edu Email
[Click Here To Access Your Live@edu Email](#)



Windows Live Features

- 10 GB of email storage, 20 mb attachments.
- 25 GB of file storage in your Sky Drive for office documents, photos, etc
- Create private, shared and public folders.
- The ability to synchronize email, contacts and calendar with your mobile phone
- Office Live Workspace supporting online document collaboration with others, even if they do not have Microsoft Office.

Attn: Users Who Requested WE Move Your Email:

If you submitted your password on the form provided to have your email moved and you think you are missing old email, please contact cpsupport@una.edu

Click on the Workflow tab to open your Workflow worklist.

University of North Alabama

My Account
Content Layout
Portal Admin
Welcome
You are currently logged in.

E-mail Groups Logout Help

MyUNAPORTAL University Calendar Tutorial Self-Service Banner **Workflow**

September 1, 2010

- Home
- Worklist
- Workflow Status Search
- Workflow Alerts

- User Profile
- My Processes
- User Information
- Change Password

Worklist

Logoff Help

Organization	Workflow	Activity	Priority	Created
UNA	<u>Course Substitution Request for - Example Student</u>	Course Substitution Approval	Normal	01-Sep-2010 10:46:55 AM

Show Reserved Items

1 - 1 of 1 First Previous Next Last Go to page: 1

Click on the Course Substitution Request link for the student. Banner will automatically open to the correct form, with the correct student and catalog year already populated.

Oracle Developer Forms Runtime - Web: Open > SMASADJ



File Edit Options Block Item Record Query Tools Help



ORACLE

Student Targets, Waivers & Substitutions SMASADJ 8.0

ID: Student, Example Term: 200810 Catalog: 2008

Navigation

Target Courses:  Substitutions: 

Waivers:  All Tracking: 

1. Click the "Next Block" button to advance to the next area of the form.

2. Click on the "Substitutions" button to enter the substitution and required courses.

When you click on the link in Workflow, Banner will automatically open to the correct form, populate the student and populate the catalog year.

Student ID; press LIST for valid ID's, CQH for ID's in Adjustments Library.
Record: 1/1 | | ... | | <OSC>

Electronic Course Substitution

Please follow the normal course substitution process as outlined in the training and handouts provided to you by the Registrar's Office.

Oracle Developer Forms Runtime - Web: Open > SMASADJ



File Edit Options Block Item Record Query Tools Help



ORACLE

Student Targets, Waivers & Substitutions SMASADJ 8.0

ID: Student, Example Term: 200810 Catalog: 2008

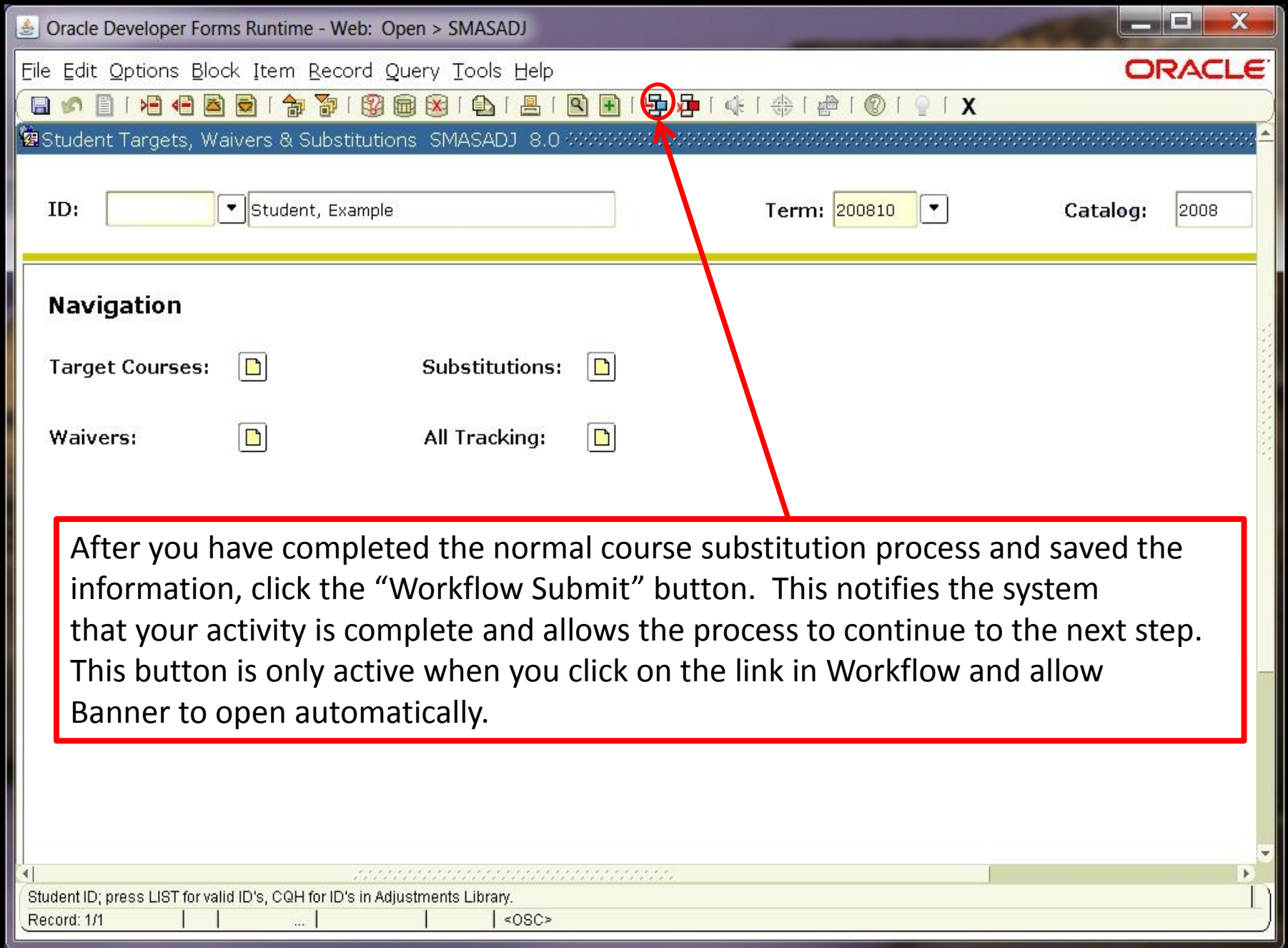
Navigation

Target Courses:  Substitutions: 

Waivers:  All Tracking: 





After you have completed the normal course substitution process and saved the information, click the “Workflow Submit” button. This notifies the system that your activity is complete and allows the process to continue to the next step. This button is only active when you click on the link in Workflow and allow Banner to open automatically.

Student ID; press LIST for valid ID's, CQH for ID's in Adjustments Library.
Record: 1/1 | ... | <OSC>

The screenshot shows the Oracle Developer Forms Runtime interface. At the top, there is a menu bar with 'File', 'Edit', 'Options', 'Block', 'Item', 'Record', 'Query', 'Tools', and 'Help'. Below the menu bar is a toolbar with various icons. A red circle highlights the 'Workflow Submit' icon, which is a document with a checkmark. A red arrow points from this icon to a text box below. The text box contains instructions on how to use the 'Workflow Submit' button. The main area of the form has a header with 'ID:', 'Student, Example', 'Term: 200810', and 'Catalog: 2008'. Below this is a 'Navigation' section with four links: 'Target Courses', 'Substitutions', 'Waivers', and 'All Tracking', each with a document icon. At the bottom, there is a status bar with 'Student ID; press LIST for valid ID's, CQH for ID's in Adjustments Library.' and 'Record: 1/1 | ... | <OSC>'.

ID:	<input type="text" value="Student, Example"/>	Term:	<input type="text" value="200810"/>	Catalog:	<input type="text" value="2008"/>
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Navigation

Target Courses:		Substitutions:	
Waivers:		All Tracking:	

Student ID; press LIST for valid ID's, CQH for ID's in Adjustments Library.
Record: 1/1 | ... | <OSC>

Electronic Course Substitution

This ends the administrative/executive assistant's required portion of an electronic course substitution request.

File

Message

Developer



From: deptassistant@una.edu

Sent: Wed 9/1/2010 11:16 AM

To:

Cc:

Subject: Course Substitution Request

TO: estudent@una.eduCC: deptassistant@una.edu, aadvisor@una.edu, dchair@una.edu, adean@una.edu

This is to inform you that your request for course substitution has been **approved** and processed.

Substitute Course: Substitute Course

FOR

Required Course: BI 101

Approved by: An Advisor, Department Chair, A Dean

Comment(s): N/A

Upon completion and all levels of approval, the student receives an e-mail similar to the one shown here. Note all approvers are listed and notified in this final e-mail.

Electronic Course Substitution

Notes and Special Instructions

NOTE: If a department chair or dean is also a selected advisor, the process will account for this structure and there will be fewer total steps.

NOTE: If a dean is also a selected advisor, the Banner related activity will be sent to the dean's assistant instead of the department chair's assistant.

NOTE: If you have any questions regarding this process, please e-mail registrar@una.edu with your questions.

Electronic Course Substitution

Notes and Special Instructions (cont'd)

NOTE: All activities that use the Workflow product must be completed on a University provided computer and on campus, unless otherwise instructed.

If for any reason you are not ready to “Complete” your activity in Workflow, the “Save and Close” button will save your choice(s) but will leave the activity in your worklist to allow you to complete it at a later time.