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 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.
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.

All approvers and the final decision are noted here.

This request has been approved by the following individuals: An Advisor, Department Chair, A Dean.
Click on the Workflow tab to open your Workflow worklist.
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.
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.
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.
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.
Electronic Course Substitution

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