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.

Please review this document, paying special attention to your particular role in this process. 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.
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 undergraduate student submits a course substitution request electronically.
Log into UNAPortal and click on the Self Service Banner tab.
Click on the Student tab inside Self Service Banner
Click on the Student Records link in the Student Menu.
Click on the Undergraduate Course Substitution Request Page link.
You should see a screen similar to this example. If any information is incorrect, please see your advisor or the department of your correct major.
Enter the substitution course.
Select the proper subject for the required course.
Select the corresponding course number for the course subject selected. This must be a valid UNA course subject/number combination.
Please select the advisor to which the request will be sent. For individuals with multiple majors, Education majors, etc., you may see multiple names listed. Select the appropriate advisor for your course substitution request.
Click the Review Request button to verify your request. This allows you to review the information you entered. The request has not been submitted at this time.
Verify the correct substitution course, required course, required course hours and selected advisor are displayed.

Click the Submit Request button to send your request to the selected advisor.
Course Substitution Request Page

Your request has been submitted to the selected advisor.

RELEASE: 8.4
Electronic Course Substitution

This ends the student’s required portion of an electronic course substitution request.
Electronic Course Substitution

The following subset of instructions detail how an advisor completes his/her portion of an electronic undergraduate student course substitution request.
After your advisee submits the request, you (the advisor) 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.
Click on the Workflow tab to open your Workflow worklist.
Click on the Course Substitution Request link for your advisee.
You will see a page similar to this one. It will have all necessary information for you to approve/deny the request (Student Name, ID, Degree, Major, etc.).
Select the appropriate substitution type for the course(s).
Select either approve or deny for this request. By selecting approve, the request flows to the next approver. By selecting deny, the student is sent a denial e-mail from you with your comments.
Enter appropriate comments in the comments section. Any comments will be passed on to future approvers and may be sent to the student (after final approval or a denial).
After all sections are marked appropriately, click on the “Complete” button. This will save your responses, end your activity and will allow the process to continue to the next person.
Electronic Course Substitution

This ends the advisor’s required portion of an electronic course substitution request.
Electronic Course Substitution

The following subset of instructions detail how a department chair completes his/her portion of an electronic undergraduate student course substitution request.
After the advisor completes his/her activity, you (the department chair) 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.
Click on the Workflow tab to open your Workflow worklist.
Click on the Course Substitution Request link for the student.
You will see a page similar to this one. It will have all necessary information for you to approve/deny the request (Student Name, ID, Degree, Major, etc.).
Notice the information below. The substitution type and any previous approvers are noted here.
Select either approve or deny for this request. By selecting approve, the request flows to the next approver. By selecting deny, the student is sent a denial e-mail from you with your comments.
Enter appropriate comments in the comments section. Any comments will be passed on to future approvers and may be sent to the student (after final approval or a denial).
After all sections are marked appropriately, click on the “Complete” button. This will save your responses, end your activity and will allow the process to continue to the next person.
Electronic Course Substitution

This ends the department chair’s required portion of an electronic course substitution request.
Electronic Course Substitution

The following subset of instructions detail how a dean completes his/her portion of an electronic undergraduate student course substitution request.
After the department chair completes his/her activity, you (the dean) 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.
Click on the Workflow tab to open your Workflow worklist.
Click on the Course Substitution Request link for the student.

Course Substitution Request for - Example Student
You will see a page similar to this one. It will have all necessary information for you to approve/deny the request (Student Name, ID, Degree, Major, etc.).
Notice the information below. The substitution type and any previous approvers are noted here.

STUDENT INFORMATION
Name: Example Student
ID: An Advisor
Advisor (selected by student):
Catalog Term: Fall 2007
College of Education Major:
Degree, Major, Concentration, Minor Information:
Degree: Bachelor of Bus Administration
Major 1: Computer Information Systems
Option(s): Enterprise Information Systems
Minor(s): N/A

COURSE SUBSTITUTION INFORMATION
Substitute Course: Substitute Course
FOR
Required Course: BI 101
Substitution Type (provided by Advisor): Other
Previous Approver(s): An Advisor, Department Chair

Approve/Deny?
Approve
Deny

Comments:
N/A
Select either approve or deny for this request. By selecting approve, the request flows to the next approver. By selecting deny, the student is sent a denial e-mail from you with your comments.
Enter appropriate comments in the comments section. Any comments will be passed on to future approvers and may be sent to the student (after final approval or a denial).
After all sections are marked appropriately, click on the “Complete” button. This will save your responses, end your activity and will allow the process to continue to the next person.
Electronic Course Substitution

This ends the dean’s required portion of an electronic course substitution request.
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.

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
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.
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

This completes an electronic undergraduate student course substitution request.
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.
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.