Course Approval System
Approving a Course Request

Overview

This process will show the steps an approver needs to take to approve a New Course request or a Change Course request.

Steps

Approver Action

1. Open your Action List in Onestart. If you have your Workflow preferences set to receive an e-mail, you will receive an e-mail when a request is placed in your Action List. If you do not, you will need to log into OneStart and click on Action List.

2. Click on the link within the email message or click on the Notifications tab in OneStart, then click “Go to Full Action List.”

3. If you are not already logged in, you will need to authenticate with your username and passphrase.

4. Once authenticated, the Action List will display.

5. The initial sort is by document Id. You can sort this page by any of the links at the top of the list (Id, Type, Status, Initiator, etc). To sort, double click on the underlined title of the column and the list will sort by that column.

   The Title column contains pertinent information specific to the request (for example, New Course, Course Change, etc) which may help in sorting and filtering a list among the workgroup. The title includes the Institution, Course Subject Area, and Catalog Number of the course in review.

6. Click on the document Id to access the request. The document will be displayed.
7. Once the document is retrieved, you need to review it to determine whether approval may be granted. Standards for approval/non-approval are the same as those used with the paper-driven process. The user should see all of the fields the initiator submits.

   - **Notes** that have been previously submitted also appear.

8. You will see these buttons at the bottom of the form.

9. If the document is ready for approval, click **approve**. Other actions listed below may be taken.

   - **save** = The document is saved and remains in your action list.
   - **approve** = reviewer approves action and submits for next level of approval.
   - **disapprove** = reviewer disapproves action and a FYI notification of that action will be sent to the initiator via the action list. Upon clicking disapprove, you’ll also be asked, “Are you sure you want to disapprove this document?” This is intended to ensure that you want to disapprove the document.
   - **close** = This closes the form and no action is taken.
   - **print** = click this button to print the form. The E-Doc system archives your requests, so it is not necessary to print them. However, if you click **print**, it will allow you to open the document in PDF format and print your request.
   - **Return to previous route level** = This will return the form to the previous route level; you must also choose the specific route level from the drop-down box. This is used when you need additional information from a prior approval level. Also, if changes are made to the document either at the department or school level, then this requires a prior level’s approval. The form will still be en route, which is different than disapproving the form.
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10. Once the document is approved, the form will display, but further action cannot be taken at that time.

11. When you are finished reviewing/approving the request, click close.

12. The final approval based on Indiana University requirements will send the add course request to SIS for processing. Consequently, the course will be added or updated in the Course Catalog. If there is an error in processing, the document will be returned to SES for resolution.

If requested in the workgroup creation, department chair and school deans are notified once a course request form has final approval. The notification consists of an FYI in the user’s action list. The FYI has all of the course information. Workgroups are maintained by SES if adjustments need to be made.

If the request is Disapproved:
   • Activity will be written to the document’s route log.
   • Notification will be sent to the initiator via the initiator’s action list in OneStart.

It is recommended that you write down the document Id for your records. You will be able to do a “Document Search by” if you should forget to write down the id.

Additional Information:
   • The operator ID and creation date are stored.
   • The final approval date is stored.
   • Another path to accessing the Action List is through OneStart. Once you are logged into OneStart, click on action list in the left column of the page. You will also notice the number of items in your action list will be displayed on the Notifications tab.
   • You can click on the Log icon for detail of when the request was submitted. It also provides other information related to the document.

Other Resources:

Workflow online demonstration/tutorial for Admin Users:
http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/job_aids/sr/eDocs/