CourseLeaf

CLSS Workflow

FINANCIAL MANAGER

Course Section Change Requests
(Approvals and Rollbacks)

December 2023
What?

Many section modification requests require approval due to financial implications. These request types include:

- Individualized sections with a max enrollment >9
- Use of the college/school “STAFF” instructor record
- Cross-listing online resident (local, “X01”) sections with non-resident (global, “X51”) sections
- Individualized (or Internship) sections using schedule type “W” (online)
Why?

- Minimizes student impact
- Improves time to registration
- Consistent functionality across CourseLeaf products
  - *Process is the same for all colleges/schools*
  - *Automates the approval process*
  - *Eliminates extra steps*
- Budget wise
Who?

Financial Managers from each college/school are primarily responsible for approving specific course section modification requests. Secondary approvers include Dean, Asst Dean, and/or Assoc Dean.

Please notify the Academic Scheduling Office of organization changes promptly.

*CourseLeaf CLSS Approval Workflows must be updated by the ASO for correct routing of each department’s requests.*
When?

Applies to all CourseLeaf CLSS scheduling phases. For more information, refer to:

- **ASO Guidelines**
  [https://www.uvu.edu/academicscheduling/](https://www.uvu.edu/academicscheduling/)

- **CourseLeaf CLSS**
  [https://nextcatalog.uvu.edu/wen/](https://nextcatalog.uvu.edu/wen/)
How is workflow triggered?

Before a department chair (or authorized scheduler) can submit section modification requests, they’re presented with a “Validation Details” screen. This screen reflects the scheduling rules the requests passed (or failed), and which CLSS workflow will be triggered for an approval. For example:
**Validation Details**

The Section data you have provided can be saved, but will require approval. You can submit this Section for approval by clicking the Start Workflow button below.

**Any Change**
Changes are reviewed for accuracy prior to syncing with Banner, and may be rolled back for corrections.

**INV section with max enrollment >9**
Your INV section request has a max enrollment greater than 9. This requires financial manager approval. Your request has been sent to your financial manager through workflow.

- Any INV section enrollment >9, changed from existing
- Any INV section enrollment >9, new section

**Waitlist Max Enrollment vs Max Enrollment**
When the max enrollment is:
- 1-25 the waitlist max will match the max enrollment.
- Test for Waitlist Max vs Max Enrollment 1:25

**Primetime**
More than 80% of your department's course sections are scheduled during prime time hours (0800-1400 M-F).
How are approvers notified?

Once the section validation passes and the authorized scheduler clicks the button, an email is automatically sent to the designated approver. *For example:*
Designated approvers should check for email notifications regularly. Each email's subject line will include the semester, subject, course, and section number awaiting approval.

Each email also includes a unique CourseLeaf CLSS link that will route you to the specific request.

[CLSS] 2023 Summer HLTH 1100-TST Pers Health Wellness TE Review Request: HP Financial Manager CLSS

Cheryl:

There are pending schedule changes awaiting your review, including 2023 Summer - HLTH 1100-TST Pers Health Wellness TE Review. Please visit:

https://nextcatalog.uvu.edu/courseleaf/approve/?role=HP%20Financial%20Manager%20CLSS
to review the changes and provide your feedback.

For questions or information regarding this email, please reply to (academic_scheduling@uvu.edu).

Thank you.

Academic Scheduling
Utah Valley University
https://nextcatalog.uvu.edu/courseleaf/approve/?role=______

### Section header
- Rules triggered

### Rules triggered
- College STAFF record

### Rules
- Any Change
- College STAFF record

### Date requested
- Your Role and the Requestor

### Your Role and the Requestor
- Workflow queue
- Rollback and Approve buttons
  - (never click the Edit button!)

### Red/Green markup
- Comments box

### Comments box
- Comments (details for ASO and/or justifications for Dean/FM approvals)
Rollback Template

Always use the **Comments** box to indicate why you are rolling back a request.
The yellow ribbon indicates if the section is in workflow.

Authorized schedulers must enter a clear justification for the section modification request by typing it into the Comments field before submitting to workflow. If it's missing, roll the request back to the scheduler.

When an authorized scheduler clicks the red "Workflow Status" button, the "In Workflow" box appears and will reflect which approval queue the request is currently in. Clicking the orange workflow step allows them to email that person/office.
Tips

- Identify who will process requests during an absence.
- Look for Workflow emails frequently.
- Respond to requests quickly *(rollback or approve)*.
- Rollback all sections that are missing a clear justification.
- Encourage all high-impact requests be submitted *before* Phase 5—Publish to minimize student impact.
Resources

Academic Scheduling Office

- Web Site:  https://www.uvu.edu/academicscheduling/
- Email:  academic_scheduling@uvu.edu
- Staff:  https://www.uvu.edu/academicscheduling/contact.html

CourseLeaf CLSS

https://nextcatalog.uvu.edu/wen/
Thank You!