CourseLeaf CLSS Workflow

FINANCIAL MANAGER

Course Section Change Requests

(Approvals and Rollbacks)

December 2023

UVU

ACADEMIC SCHEDULING OFFICE

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)

UVU

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

UVU

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.

UVU

When?

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

➢ ASO Guidelines

  https://www.uvu.edu/academicscheduling/

➢ CourseLeaf CLSS

  https://nextcatalog.uvu.edu/wen/

UVU

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 primetime hours (0800-1400 M-F).

✖ Close   👥 Start Workflow

UVU

How are approvers notified?

Once the section validation passes and the authorized scheduler clicks the **Start Workflow** button, an email is automatically sent to the designated approver. *For example:*

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

Reply   Reply All

C   CourseLeaf <uvu@notify.courseleaf.com>
To   ● Cheryl St. Pierre

(i) We removed extra line breaks from this message.

Cheryl:

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

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) .
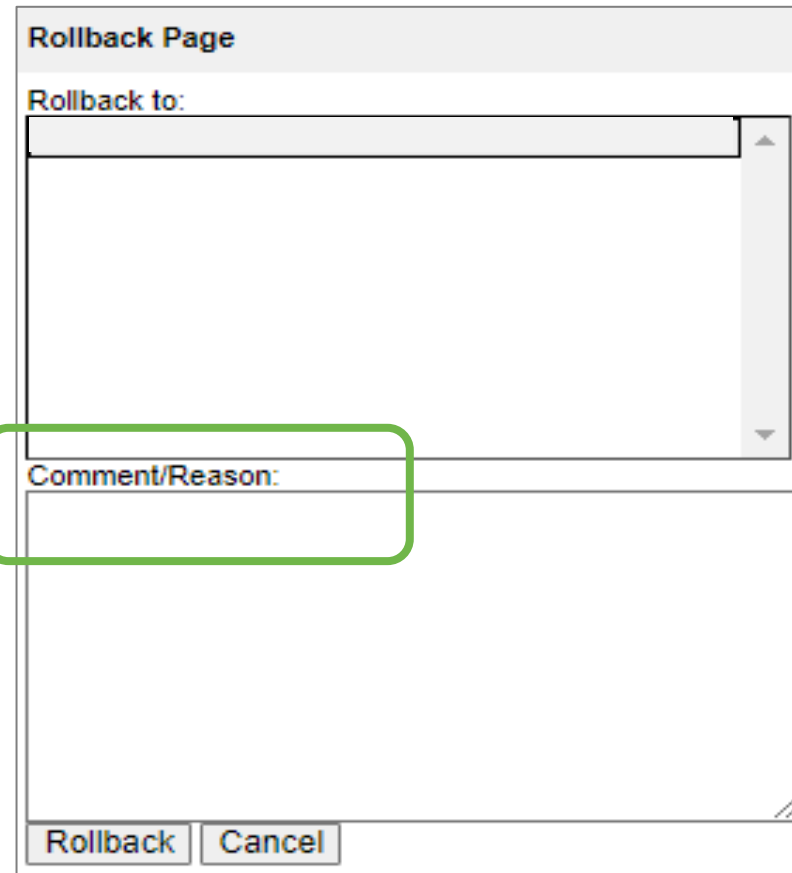
Thank you.

Academic Scheduling
Utah Valley University

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.

UVU

Pages Pending Approval

Filter List Refresh List Your Role: HP Financial Manage

PAGE
/wen/202330/pubh/3060: HLTH 1100-TST Pers Health Wellness TE

USER
Cheryl St Pierre

⭐ https://nextcatalog.uvu.edu/courseleaf/approve/?role=_____

Page Info | Workflow Status | Attached Files | Revision History

Title: HLTH 1100-TST Pers Health Wellness TE
Last Update: Jul 3, 2023 12:17pm
Template: wen
Page Authors: PUBH DUS
Workflow:
College:
Department:

PAGE REVIEW   Hide Changes   View Changes By: All Changes

Edit   Rollback   Approve

In Workflow
1. HP Financial Manager CLSS
2. Academic Scheduling
3. Banner CLSS

HLTH 1100-TST Pers Health Wellness TE

Rules Triggered
- Any Change
- College STAFF record

2023 Summer, pubh

Section Information

Course:	HLTH 1100	CRN:	21332
Title:		Part of Term:	Full Term (1) - 1 (5/10/23 to 8/11/23)
Section:	TST	Campus:	M
Credit Hours:	2	Instructional Method:	Regular Class without Lab (LEC)
Status:	Active	Visible:	No
Special Approval:	(None Assigned)	Schedule Type:	Online (W)
Grade Mode:	Standard Letter	URL:	
Final Exam:	N--Classroom/Lab is NOT needed	Session:	Not Applicable
Cross-list With:			

Section Attributes
Canvas Course Mats $34/Pearson
Integrative Applied Learning
Intellectual/Practical Skills
Personal Health
Stewards of Place

Course Attributes
Canvas Course Mats $34/Pearson
Integrative Applied Learning
Intellectual/Practical Skills
Personal Health
Stewards of Place

Restrictions
Level to EXCLUDE
CE - Continuing Education

Instructor
STAFF, Coll of Health and Public Service (10000509) Staff – Primary – 100%

Meeting Pattern

Pattern	Type	Room	Dates
Does Not Meet	Online (Class)	ONLINE ONLINE (None Assigned)	Using Part of Term Dates

Enrollment
Maximum: 0   Waitlist Maximum: 0

0 current, 0 prior, 0 waiting

Section Text (visible in student views)

Comments (details for ASO and/or justifications for Dean/FM approvals)

Annotations:

Section header

Rules triggered

Date requested

Your Role and the Requestor

Workflow queue
Rollback and
Approve buttons

(never click the Edit button!)

Red/Green markup

Comments box

UVU

Rollback Template

Always use the **Comments** box to indicate why you are rolling back a request

Rollback Page

Rollback to:

Comment/Reason:

Rollback Cancel

UVU

Edit Section – HLTH 1100-TST: Pers Health Wellness TE (CRN: 21332; CLSS ID: 3060)

This section and/or cross-listed sections are now in Workflow.

Section Information — 2023 Summer, pubh

Title: Pers Health Wellness TE (Default Value)
Section: TST
Credit Hours: 2
Status: Active
Special Approval: (None Assigned)
Grade Mode: Standard Letter
Final Exam: N--Classroom/Lab is NOT needed
Cross-list With: Select section...

Part of Term: Full Term (1) - 1 (5/10/23 to 8/11/23)
Campus: M
Instructional ...: Regular Class without Lab (LEC)
Visible: No
Schedule Type: Online (W)
URL:
Session: Not Applicable
Restrictions: Level

Section Attributes
Canvas Course Mats $34/Pearson
Integrative Applied Learning
Intellectual/Practical Skills

Course Attributes
Canvas Course Mats $34/Pearson
Integrative Applied Learning
Intellectual/Practical Skills

Instructor
STAFF, Coll of Health and Public Service (10000509)

Building and Room
ONLINE ONLINE (99999)

Meeting Pattern
Does Not Meet

Enrollment 0 current, 0 prior, 0 waiting
Maximum: 0
Waitlist Maxim...: 0

Section Text (visible in student views)

Comments (details for ASO only)

In Workflow
1. HP Financial Manager CLSS
2. Academic Scheduling
3. Banner CLSS

Bridge Tools   User View   Workflow Status   Cancel   Save Section

---

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.

UVU

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/

UVU