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# OAKLAND UNIVERSITY COURSE ACTION FORM

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### Logging In

To login use your OU NetID (mail) username and password. This will allow you access to your account in the eCAF system. If you need to change your NetID password or want more information about your NetID account please visit the NetID Management website at <https://ouca.oakland.edu/profile/>.

Please enter your NetID (email) username and password:

Enter username:  @ oakland.edu

Enter password:

For more information about your NetID please go to the [NetID Management website](#).

Figure 1

### Your Account Main Page

Your account main page may consist of one or more sections depending on your role in the submission process (Figure 2).

All users will see a section titled **Course Action Forms You've Entered**. This will be a list of the forms you've created and have not archived. The CAF # is a system assigned number to uniquely identify each form. The type of form is listed in the type column with the following codes: 'C' for a change in course form and 'N' for a new course form. The status column refers to where in the process the form is currently. The date column identifies the date the CAF was created.

For all unsubmitted forms the Edit and Delete options are available. For all submitted forms you can View, Archive and/or view the History for the form.

Welcome, **Test User**, to the Electronic Course Action Forms (ECAF):

Course Action Forms You've Entered									
CAF#	Subj	Number	Eff Term	Type	Status	Date			
496	ACC	222	200910	N	Submitted	10/30/2008	<a href="#">VIEW</a>	<a href="#">ARCHIVE</a>	<a href="#">HISTORY</a>
497	ACC	200	200830	C	Created	10/28/2008	<a href="#">EDIT</a>	<a href="#">DELETE</a>	

[Add](#) a Course Action Form

[View Archived](#) | [View Deleted](#) | [Logout](#)

Figure 2

If you have Course action forms that have been forwarded to you for review you will see a section titled **Course Action Forms for Your Review**. This should be considered your

worklist as these forms require action on your part to move further through the process. Your options in this section include Viewing the form and viewing the History of the form.

If you have forms that you've reviewed, you will also see a section listing those forms. These are forms that require no action on your part and you have not yet archived.

## Creating a Course Action Form for an Existing Course

To add a course action form for a course that already exists click the ADD link at the bottom of the Course Action Forms You've Entered section on your main account page (Figure 3).

Course Action Forms You've Entered									
CAF#	Subj	Number	Eff Term	Type	Status	Date			
496	ACC	222	200910	N	Submitted	10/30/2008	<a href="#">VIEW</a>	<a href="#">ARCHIVE</a>	<a href="#">HISTORY</a>
497	ACC	200	200830	C	Created	10/28/2008	<a href="#">EDIT</a>	<a href="#">DELETE</a>	
<a href="#">Add</a> a Course Action Form									

Figure 3

Then you can select the Request Changes to an existing course option on the next screen (Figure 4).

Select a Course Action Form type:

[Request a New Course](#)

[Request Changes to an existing course](#)

Figure 4

You will then be required to enter the subject code (rubric) and the course number for the existing course. If you enter an invalid subject code – course number combination you will receive a message indicating the course does not exist. You will then need to go back one page (with the link provided) and enter another course.

Subject Code (Rubric):

Course Number:

Figure 5

If the subject and course number are valid the course action form setup page will appear. In the EDIT column select the areas of information you'd like to request



changes for. For example, to request a change to the Banner Title, click the box in the EDIT column in the Banner column row.

*Please note: not all areas of information currently contain data in Banner, so they may appear empty.*

The General Application Information area is REQUIRED, so that the effective term of the requested change can be entered, and will be selected by default. Information about whether a course is a Gen Ed course or is required to complete a curriculum is not currently extractable from Banner and will not appear on the setup screen.

Course Action Form Setup	
Select the areas you'd like to edit, then click the Edit Checked button at the bottom of the form.	
Course: ACC 200	
	EDIT
General Application Information: <b>REQUIRED</b>	Effective Term: None Selected Gen Ed Course: Not Selected Curriculum Course: Not Selected
▼ CURRENT BANNER COURSE DATA ▼	
Banner Title:	Intro to Financial Accounting
Long Course Title:	
Division:	Accounting
Department:	Accounting
Credits:	4 Credits
Repeats:	
Schedule Type:	Main Campus Classroom, Lecture, Online
Fees:	
Equivalent Courses:	
Attribute:	
Grade Mode:	Satisfactory/Unsatisfactory, Standard Numeric, Audit
Catalog Description:	Introduction to accounting information as an aid to decision-making for external users of financial statements. Students learn how to measure and record accounting data, prepare financial statements and analyze published financial accounting information. Prerequisites: Sophomore standing.
Prerequisites:	MIS 100 (2.0) or ( MIS 200 (2.0) or CSE 125 ) (2.0)
Corequisites:	
Registration Restrictions	
<input type="checkbox"/> Level:	<input type="checkbox"/> Major:
<input type="checkbox"/> Degree:	<input checked="" type="checkbox"/> College:
<input type="checkbox"/> Program:	<input type="checkbox"/> Class:
	Exclude FR
<input type="checkbox"/> Campus:	
Edit Checked →	

Figure 6

Once the areas to be edited are selected click the Edit Checked → button at the bottom of the form.

The form to enter the requested changes will be displayed. It will be made up of one or more areas, determined by the areas you selected on the setup form. For an example of this form and a description of each of the areas that can be edited see the **Areas Available on Course Action Forms** section.

## Creating a Course Action Form for an New Course

To add a course action form for a new course click the ADD link at the bottom of the Course Action Forms You've Entered section on your main account page (Figure 3).

Course Action Forms You've Entered									
CAF#	Subj	Number	Eff Term	Type	Status	Date			
436	ACC	200	200730	C	Forwarded	10/09/2008	<a href="#">VIEW</a>	<a href="#">ARCHIVE</a>	<a href="#">HISTORY</a>
438	AAA	222	000000	N	Submitted	10/09/2008	<a href="#">VIEW</a>	<a href="#">ARCHIVE</a>	<a href="#">HISTORY</a>
442	ACC	200	200730	C	Unsubmitted	10/09/2008	<a href="#">EDIT</a>	<a href="#">DELETE</a>	
<a href="#">Add</a> a Course Action Form									

Figure 7

Then you can select the Request a New Course option on the next screen (Figure 4).

Select a Course Action Form type:

[Request a New Course](#)

[Request Changes to an existing course](#)

Figure 8

You will then be required to enter the subject code (rubric) and the course number for the new course. Click continue after the course has been entered.

Subject Code (Rubric):

Course Number:

Figure 9

The form to select the areas of information you'd like to request for the new course will appear. Place a check in the box next to each area for which you'd like to enter information. The General Application Information area is required and is checked by default.

Click the ADD Checked button after all the selections have been made. If you forget to check an area you will be able to edit the Course Action Form before you submit it and add any areas.

Select the fields you'd like to ADD, then click the ADD Checked button at the bottom of the form.

Course: ACC 222	
	ADD
General Application Information (Required):	<input checked="" type="checkbox"/>
Banner Title:	<input type="checkbox"/>
Long Course Title:	<input type="checkbox"/>
Division:	<input type="checkbox"/>
Department:	<input type="checkbox"/>
Credits:	<input type="checkbox"/>
Repeats:	<input type="checkbox"/>
Schedule Type:	<input type="checkbox"/>
Fees:	<input type="checkbox"/>
Equivalent Courses:	<input type="checkbox"/>
Attribute:	<input type="checkbox"/>
Grade Mode:	<input type="checkbox"/>
Catalog Description:	<input type="checkbox"/>
Prerequisites:	<input type="checkbox"/>
Corequisites:	<input type="checkbox"/>
Registration Restrictions	
<input type="checkbox"/> Level:	<input type="checkbox"/> Major:
<input type="checkbox"/> Degree:	<input type="checkbox"/> College:
<input type="checkbox"/> Program:	<input type="checkbox"/> Class:
<input type="checkbox"/> Campus:	
ADD Checked ->	

Figure 10

The form to select the areas of information you'd like to request for the new course will appear. Place a check in the box next to each area for which you'd like to enter information. The General Application Information area is required and is checked by default.

Click the ADD Checked button after all the selections have been made. If you forget to check an area you will be able to edit the Course Action Form before you submit it and add any areas. A form will appear with the areas you have selected.

For an example of this form and a description of each of the areas that can be edited see the **Areas Available on Course Action Forms** section.

## Areas Available on Course Action Forms

Whether the course action form is being created for an existing course or a new course you will see a form after selecting the areas to edit that will display a place to input data into each of those areas.

Proposed Changes to **ACC 333**

Changes Effective: Summer Semester 2008 ▼

☐ Gen Ed Course      ☐ Curriculum Course (required for major)

Proposed New Banner Title  
(30 character limit):

Proposed New Long Title:	Eff Term: <input type="text"/>	End Term: <input type="text"/>
* Enter the term code (e.g. 200840, 200910, 201030)		

Division:  ▼

Figure 11: Data Input Form

Once all of the data has been entered click the Continue button. This will take you to the Edit Course Form (see Edit Course Form).

The areas available for editing on the Course Action Form are described below:

### General Application Information

General Application Information for a CAF includes the term for which the requested changes will become effective, a check box for whether the course is a Gen Ed Course and a check for whether the course is a curriculum course, that is, the course must be taken to meet the requirements for a major or program.

The Changes effective Term must be selected for each CAF. The Gen Ed Course and Curriculum Course boxes are optional. Please note, the answers to the Gen Ed Course and Curriculum Course are not stored in Banner, therefore they will not pre-populate with previously requested data. I.e. if you requested a new course and checked one or both of the check boxes for Gen Ed and Curriculum, the next time you complete a CAF changing that course it will not be marked Gen Ed or Curriculum.

Changes Effective: Summer Semester 2008 ▼

☐ Gen Ed Course      ☐ Curriculum Course (required for major)

Figure 12

**Proposed New Banner Title**

The proposed new banner title is the title as it appears in the banner system. There is a 30 character limit for this request.

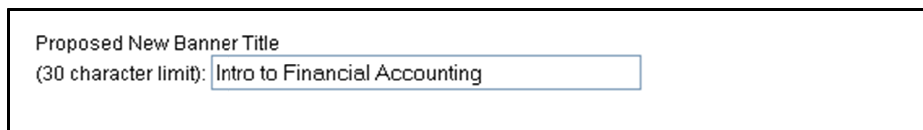
A screenshot of a form field for 'Proposed New Banner Title'. The label 'Proposed New Banner Title' is at the top. Below it, the text '(30 character limit):' is followed by a text input box containing the text 'Intro to Financial Accounting'.

Figure 13

**Long Title**

The long title is the title that will be used in the course catalog. You must enter the term range this title will be effective using the Banner term codes (i.e. 200840 for Fall 2008, 200910 for Winter 2009, etc.). If there is no end term enter 999999 in the end term field.

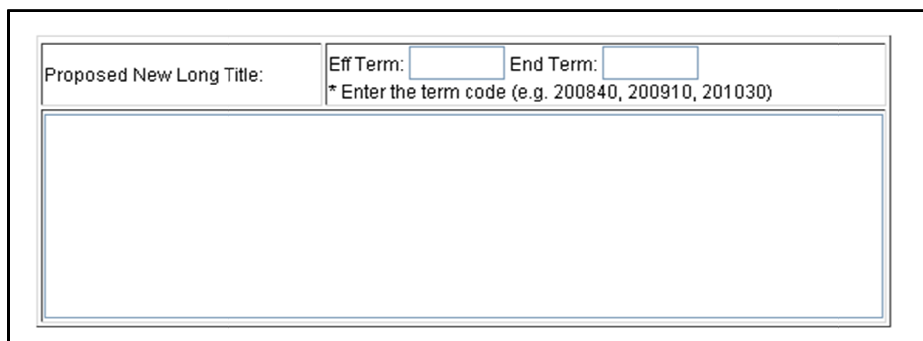
A screenshot of a form for 'Proposed New Long Title'. It includes a large text area for the title. To the right, there are two small input boxes labeled 'Eff Term:' and 'End Term:'. Below these boxes is a note: '\* Enter the term code (e.g. 200840, 200910, 201030)'.

Figure 14

**Division and Department**

The division and department fields are separate fields on the Course Action Form Setup form but both are simply drop down lists of the divisions and departments in Banner. Select the appropriate choice from the list.

A screenshot of two dropdown menu fields. The first is labeled 'Division:' and has 'Accounting' selected. The second is labeled 'Department:' and also has 'Accounting' selected. Both dropdowns have a small blue arrow icon on the right.

Figure 15

**Credit Hours**

Credit hours can be entered either as a single value, a range, or an option between two values. To enter a single value, input a number in the first box on the left and leave the drop down and second box empty. To enter a range or second value, select the appropriate choice from the drop down box (TO or OR) and enter a second value in the other box. For example to enter a credit hour range from 2 to 4 credit hours enter 2.000 in the first box, select "TO" in the dropdown, and enter 4.000 in the second box

Figure 16

### Repeat Codes

The options for repeat code are “Course may be repeated” or “Course may not be repeated.” If a course can be repeated enter the Course Repeat Limit, that is the number of times a course can be repeated, and/or the maximum credit hours for which a course can account for.

Figure 17

### Schedule Type

The schedule types for a course can be chosen by moving the appropriate types from the Available Schedule Type box on the right to the Current Schedule Type box on the left. You can choose one or more schedule types on either side (use the ctrl key and mouse button to select more than one) and the arrow keys to move the types from side to side. The Course Attributes and Grad Modes (see below) work in the same manner.

Figure 18

### Equivalent Courses

To enter an equivalent course enter the subject (rubric) code, the course number and start and end terms for the equivalency. If the equivalency is open ended enter 999999 in the end term. To enter more equivalencies click the Add a Row link. If you need to delete a row click the Remove a Row link. Please note: the Remove a Row link removes the last row listed. So it is advisable to remove rows as needed before adding rows.

Subject	Course Number	Start Term	End Term
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add a Row](#) [Remove a Row](#)

Figure 19

## Attributes

Like the Schedule Type above, the Attributes for a course can be chosen by moving the appropriate attribute from the Available Attributes box on the right to the Current Attribute box on the left. You can choose one or more attribute on either side (use the ctrl key and mouse button to select more than one) and the arrow keys to move the types from side to side.

Figure 20

## Grade Modes

Grad Modes can be added or removed in the same manner as Attributes and Schedule Type described above.

Figure 21

## Catalog Description

The catalog description is a free-form field that will accept any text. The catalog description should not exceed 50 words.

Figure 22

## Prerequisites

Prerequisites should be entered one course per line. If more rows are required click the Add a Row link at the bottom of the table. If more than one course is entered a connector should be included on all lines other than the first. Left and right parenthesis should be included to encompass courses that should be grouped together. For instance, the example below indicates that the prerequisites for the course in question are MIS 100 and *either* MIS 200 *or* CSE 125.

Minimum grade requirements for each course can also be included and if the prerequisites can be taken concurrently with the course in question “Y” should be selected in the Concurrent field.

Proposed New Prerequisites:						
Connector	LParen	Subj	Number	RParen	Min Grade	Concurrent?
<input type="button" value="v"/>	<input type="button" value="v"/>	MIS	100	<input type="button" value="v"/>	2.0	<input type="button" value="v"/>
And <input type="button" value="v"/>	( <input type="button" value="v"/>	MIS	200	<input type="button" value="v"/>	2.0	<input type="button" value="v"/>
Or <input type="button" value="v"/>	<input type="button" value="v"/>	CSE	125	) <input type="button" value="v"/>	2.0	<input type="button" value="v"/>

[Add a Row](#) [Remove a Row](#)

Figure 23

### Corequisites

Corequisites should be entered one course per line. If more rows are required click the Add a Row link at the bottom of the table. For each corequisite enter the subject and course number for each course that must be taken in the same term as the course for which the course action form is being completed.

Corequisite Courses:	
Subject	Course Number
<input type="text"/>	<input type="text"/>

[Add a Row](#) [Remove a Row](#)

Figure 24

### Registration Restrictions

Registration restrictions can be included for the following student attributes: level, major, degree, college, program, class and/or campus. All of the restrictions can be setup to include or exclude a list of codes and all the restriction areas work the same way in the course action form system.

The include or exclude indicator applies to the codes listed in the “Current” restrictions listed on the left. For instance, in the Level example below students with a level of GR, PH or PD would be excluded from registering for the course in question. Also, in the Major Restriction example below, only students with a major of 1055, 1070, 1071, 1072, or 1075 would be allowed to register for the course.

Use the arrow keys to move codes from one side to the other.



Figure 25

## Editing a Course Action Form

After the initial data has been gathered on the Course Action Form, whether it is for a new course or an existing course, The Edit Course Form will appear. If the CAF is for an existing course the current data from the Banner system for the course will appear on the left side of the form.

### Edit Course Form

Course: ACC 200

Course Action Form #: 497

	CURRENT COURSE DATA	REQUESTED CHANGES	EDIT
General Application Information:		Effective Term: 200830 Gen Ed Course: No Curriculum Course: No	<input type="checkbox"/>
Long Course Title:		Intro to Financial Acct I	<input type="checkbox"/>
Banner Title:	Intro to Financial Accounting	Intro to Financial Acct I	<input type="checkbox"/>
Division:	Accounting	Art and Art History	<input type="checkbox"/>
Department:	Accounting		<input type="checkbox"/>
Credits:	4 Credits		<input type="checkbox"/>

<u>College</u> <u>Program</u> <u>Class</u> Exclude FR - Freshman  <u>Campus</u>	<input type="checkbox"/> <u>College</u> <input type="checkbox"/> <u>Program</u> <input type="checkbox"/> <u>Class</u> <input type="checkbox"/>  <u>Campus</u> <input type="checkbox"/>
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Comments:

[Return to your Course Action Forms](#)

Figure 26

From here you can click the checkbox next to any areas that you'd like to edit then click the Edit Checked button. You can also add comments to the form, save the form for later editing, submit the form to another user to review or attach a file.



Figure 27

Comments are added to the form as they are entered by any users submitting or reviewing the form. They will display with the name of the user and the time and date of entry.

### Attaching a File to Your Course Action Form

You can attach a file such as a syllabus, justification, or any other file in any format. Since the files may need to be reviewed by other users, it is recommended that the files be in a commonly used format, i.e. Microsoft Word, Excel, text files, etc.

A file title is required to reference the file on the Course Action Form and the file will have to reside on a drive accessible to the user at the time of attaching. This might be the computer hard drive, a flash drive, or an optical (CD) drive.

A screenshot of a web-based dialog box titled 'ATTACH FILE'. The dialog box has a light gray background and a thin black border. Inside, there is instructional text: 'To attach a file, simply provide the required information and click on UPLOAD FILE button when finished. Note that you must be using Internet Explorer 4.x or Netscape 4.x or higher in order to take advantage of this utility.' Below this, there are two required fields. The first is 'Title of File (Required)' with a text input field and a label 'Please provide a title or name of your file: (this is the name that will appear on the list of files attached to this application):'. The second is 'Attach File (Required)' with a text input field and a label 'Type in the full path and name of the file you want to attach, or click on BROWSE button and navigate to the file location on your computer - it can be located on your hard drive - usually the C drive or on floppy disk:'. To the right of the second input field is a 'Browse...' button. At the bottom of the dialog box are two buttons: 'Attach File' and 'Cancel'.

Figure 28

### Submitting Your Course Action Form

To submit your Course Action Form for review, whether it is to a department head, a chair, a dean or to the Undergrad office, click the "Submit Form" button at the bottom of the Edit Course Form. Enter the email username (email address without '@oakland.edu') of the user to which you'd like to submit the form for review. To allow that user to edit the form when they view it click the "Allow Editing" checkbox. All users reviewing the form will be allowed to add comments

If you need to grant other users access to view the form you can enter any number of user names. Click the Add a Name link and enter the email username.

Click the Continue button to see the confirmation page asking if you are sure you want to submit the form. *Once the form is submitted you will not be able to edit it unless it is returned to you by a reviewer.*

### **Deleting a Course Action Form**

Course Action Forms that have not been submitted can be deleted from “Course Action Forms You’ve Entered” section on the main page of your account. Click the delete link for the CAF you’d like to delete. Deleted CAFs will be removed from the “Course Action Forms You’ve Entered” section of your page, but they will be viewable by clicking the View Deleted Link on the left menu or at the bottom of your main page.

### **Archiving Course Action Forms**

Course Action Forms you’d like to save but remove from your “Course Action Forms You’ve Submitted” list can be archived. Click the Archive link for the course action form you’d like to save. To view the CAFs you have archived click the “View Archived” link in the left menu or at the bottom of your main page.

## **Reviewing Course Action Forms**

The area on the main page labeled “Course Action Forms for your Review” lists all CAFs that require action on your part. These are Course Action Forms that have been submitted by other users to you, or that have been reviewed by other users and approved to you. You can view the CAF by clicking the VIEW button.

If you’ve been given access to edit the form by the submitter or previous reviewer you will see the edit column with a check box for each area you can edit. For instructions on editing the form see **Editing a Course Action Form** above.

### **Returning Form to Submitter**

If the form requires corrections a reviewer can return the form to the submitter to make corrections. When you click on View from your Account Main Page next to the form you’d like to return you will see a button labeled “Return to Submitter.” After clicking the button a confirmation page will appear. Once you’ve returned a form to a submitted, the form will no longer appear in your “Course Action forms for Your Review” table but will be moved to the “Course Action Forms You Have Reviewed” table.

### Approving Course Action Forms

Approving course action forms simply means moving the course action form along to the next level of review. The Approve Form button displays the page allowing you to enter the OU email address of the next person to review the form. If you choose to allow the next reviewer to edit the form click the Allow Editing check box.

If other people will need to be able to view the form, click the “Add a Name” link on this page and enter the OU email username. You can add as many people as necessary to view the form.

Course Action forms you have approved will appear in your “Course Action Forms you Have Reviewed” table on your Main Account Page, and can be archived from there.

### Viewing the History of a CAF

There are a number of different ways to see the submission and routing history of a course action form. In either the “Course Action Forms for your Review” or the “Course Action Forms you Have Reviewed” tables there is a link to the HISTORY of the form. The history will display the date and time a form was created, submitted and moved along to the next user for review or returned to the submitter.

A history of a course action form can also be viewed *by a reviewer* at the bottom of the course action form itself.

### Reporting a Problem

If you run into a technical error when working on a course action form click the “report Problem link in the left menu. Please provide a one line summary, or title, for the problem, enter the Rubric and number of the course you were working on, and enter as specific a description as possible of the error. A copy of any error messages displayed and description of the action being performed when the error occurred will help diagnose the problem and result in a much quicker resolution.

Example of a useful problem report:

I received the following error message when I clicked the Approve Form button after editing the prerequisites on the form for the effected course.