

Getting Started With Request 3.0 A User Tutorial

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**Course Materials Office
Kennedy School of Government
Harvard University**

and

Olszewski Consulting

Getting Started with Request 3.0 A User Tutorial

Part I:	Accessing the System: Your User Name and Password	1
Part II:	A Quick Primer on Navigation	2
Part III:	Setting Up and Accessing Your Courses	3
Part IV:	Working with Your Shopping Cart— Adding Items to Your Cart	4
	Searching For An Item by Course History	4
	Selecting A Course To Review	5
	Adding Items from Course History to Your Shopping Cart	6
	Searching For An Item By Keyword	7
	Viewing Your Keyword Search Results and Adding Items to Your Shopping Cart	8
	Creating New Items	8
Part V:	Working with Your Shopping Cart— Creating Packets and Handouts	10
Part VI:	Working with Your Shopping Cart— Assigning Items to Packets and Handouts	11
Part VII:	Editing Packets	12
Part VIII:	Ordering a Packet	13
Part IX:	Tracking Your Packet	14

Request 3.0 is an online system for creating, editing, ordering and tracking the status of packets and handouts. Using Request 3.0 you can quickly and easily search for items used in previous semesters and preview them online, or submit new items to the database. You can work on packets and handouts over multiple sessions without losing data, and easily switch from working on one packet to another, or from one course to another. The system is web-accessible from any internet-enabled machine, 24 hours a day. The system uses a familiar Shopping Cart metaphor. You have one Shopping Cart for each course you are assigned to work on. You simply shop for items, drop them into your cart, assign the items to packets or handouts and sequence them as you wish. You can then submit the packet or handout for production. It's that easy.

The Course Materials Office scans all new items into Request 3.0, allowing you to access an ever-growing database of materials. They will also use Request 3.0 to submit items for copyright clearance and to track the status of an item's copyright clearance as well as the status of packets submitted for production. Request 3.0 creates digital versions of packets that the printer can download for printing, allowing for faster turn around time on packet production. Once the final packets have been received, the Course Materials Office will use Request 3.0 to track sales of course packs to students and keep tabs on inventory levels.

A Note about Browsers and Monitor Resolution

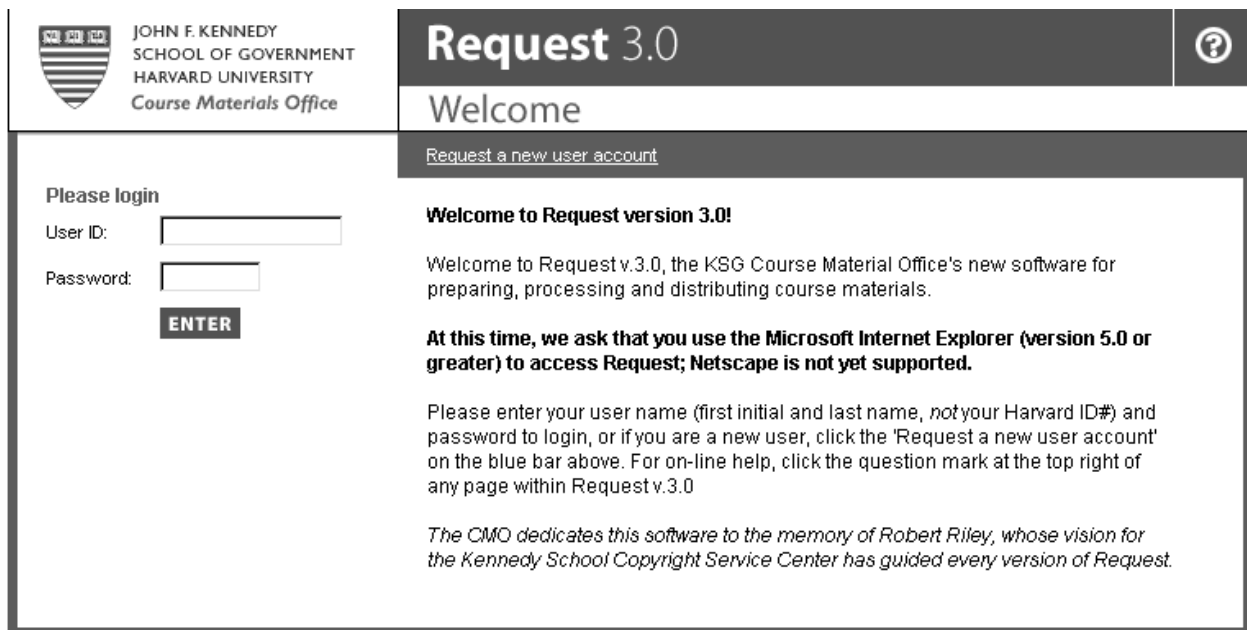
Request 3.0 has been designed to work with Microsoft Internet Explorer Versions 5.0 and higher. Earlier versions of IE are not supported.

In addition, we have found in testing that Netscape Navigator does not work for this application. *You must use IE to access Request 3.0.* If you do not already have Microsoft Internet Explorer installed, you may download it free of charge from <<http://www.microsoft.com/windows/ie/default.asp>>.

Request 3.0 was designed to support monitors set to 800 x 600 or above.

Part I: Accessing the System: Your User Name and Password

Request 3.0 is an online system that is accessible from your KSG intranet.



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Course Materials Office

Request 3.0

Welcome

[Request a new user account](#)

Please login

User ID:

Password:

ENTER

Welcome to Request version 3.0!

Welcome to Request v.3.0, the KSG Course Material Office's new software for preparing, processing and distributing course materials.

At this time, we ask that you use the Microsoft Internet Explorer (version 5.0 or greater) to access Request; Netscape is not yet supported.

Please enter your user name (first initial and last name, *not* your Harvard ID#) and password to login, or if you are a new user, click the 'Request a new user account' on the blue bar above. For on-line help, click the question mark at the top right of any page within Request v.3.0

The CMO dedicates this software to the memory of Robert Riley, whose vision for the Kennedy School Copyright Service Center has guided every version of Request.

1. Enter your User ID. Your User ID is the first letter of your first name followed by your last name, with no spaces or punctuation. *For example, John Smith's User ID would be jsmith.* Your User ID is not case sensitive.
2. Enter your password and click **Enter**. If you do not have an account, you need to create a new user account—continue to step 3.

3. To create a new user account, click **Request a New User Account**. Please request a new account only if you have not previously been assigned one. All fields on the Request New Account form are required except for the fax field. You may create your own password. Passwords must be a minimum of five characters long.

The screenshot shows the 'Request 3.0' user account request form. At the top left is the logo for the John F. Kennedy School of Government, Harvard University, Course Materials Office. The page title is 'Request 3.0' with a 'Home' link and a help icon. Below the title is a navigation bar with a home icon and the text 'Request an account'. The main form area has a grey background and contains the following fields: 'Choose your user group*' with a dropdown menu showing '-- Choose One --'; 'First name*', 'Last Name*', 'Harvard ID*', 'Email*', 'Phone*', 'Fax', 'Password*', and 'Confirm Password*'. Each field has a corresponding input box. At the bottom of the form are two buttons: 'ENTER' and 'RESET'.

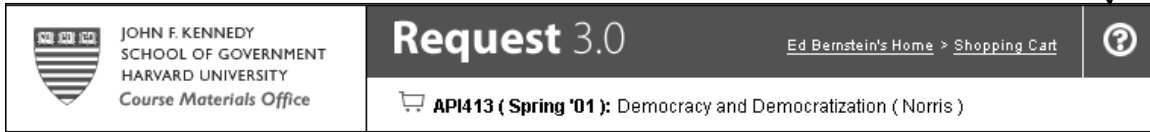
4. Click **Enter** to submit your request for a new account to the Course Materials Office for approval. The CMO will contact you via email once your account has been activated.
5. You must accept the User Agreement every time you access Request. This agreement states that you agree not to distribute in hard copy or electronic form any materials accessed through this database or use the materials in any manner that will infringe the copyrights or other proprietary rights of the owners of the materials. You cannot print archived items from the database.

Part II: A Quick Primer on Navigation

Request 3.0 was designed to have an intuitive user interface. It was created around the model of a Shopping Cart, similar to amazon.com and other online shopping services.

1. Each user has a personal home page that can be customized to display courses that they are assigned to work on.
2. Each course has a Shopping Cart associated with it for each semester.
3. You can fill your Shopping Cart by searching the database by keyword or by browsing through course history for a previous offering of the current course or any other course, or you can create new items in the database. Items can be previewed online. Selected items are dropped into the Shopping Cart.
4. After you select your items, you create packets and handouts, and assign the items to them.
5. Once the packets and handouts are created, you add descriptions and class dates, and sequence the items in the packets as desired.
6. Finally, you submit your order for the packet and are able to track its status online.

- The Request 3.0 masthead serves as your main navigation tool throughout Request. In the upper right hand corner on all pages you will find a question mark icon; this is your online help system. Help is available for every page in Request.



- The white bar in the masthead tells you where you are in the system. In this example, you are in the Shopping Cart for API413 for Fall 2001.
- Above the white bar, to the left of the help icon is a clickable road map of where you are in the system hierarchy. In this example, you are in the Shopping Cart, and you can return to your home page by clicking the link in the red bar.
- On many pages, the blue bar immediately below the white bar will have further options. For instance, when ending a session, you can logout by going to your home page and clicking the logout link in the blue bar.

Part III: Setting Up and Accessing Your Courses

Each semester, you will need to add to your personal home page the courses for which you will be creating course packs and handouts. You may add or remove courses for your home page at any point in the semester; any course on which you will work must be added to this page. From your home page, you can see the status of all the resources for your courses. Multiple users can view and edit the same course from their home page.

REMOVE	COURSE	SEMESTER	INSTRUCTORS	NUMBER OF COURSE PACKS
	API311 Decision Theory	Fall 2001	Hammitt, James	8
	Packet 1 Status: Submitted for Production Packet 2 Status: Submitted for Production Packet 3 Status: Submitted for Production Packet 4 Status: New Packet 5 Status: Submitted for Production Packet 6 Status: New Packet 7 Status: New Packet 8 Status: New			
	ISP150 Y Seminar: International Security and Political Economy	Fall 2001	Falkenrath, Richard	0
	▶ ISP205 American National Security	Fall 2001	Carter, Ashton	1
	▶ ISP475 European Security	Fall 2001	Falkenrath, Richard	1
	PAL103 M Transformational Leadership	Fall 2001	Augusto, Geri	0

1. If you need to create packets or handouts for a course that does not appear on your course list, click **Add a Course** from your personal home page. This will allow you to search from the currently available courses and add them to your home page.
 - a. You can search for courses by course code and section, course title or instructor's last name (the instructors' first names are not indexed).
 - b. For the broadest search, enter partial information in the search form. For instance, you could search on all PAL courses by entering just "PAL" in the course code field and leaving the other fields blank.
 - c. For the narrowest search, enter as much information as possible in the search form. This will result in the most exact search results. However, this increases the chance that the course you want will not appear in the results.
 - d. To search for more than one instructor at a time, use the format: Smith, Jones.
 - e. If the course you are looking for does not appear in the database, contact the Course Materials Office.

Note: Courses are available for a limited time during the academic year. Fall courses tend to be available from the beginning of July to the following February. Spring courses are usually available from the beginning of the previous November until the end of June. If a course has been removed from your home page at the end of the semester, it is not possible for the CMO to distribute any more readings for that course.

2. If you wish to *remove* a course from your home page, click on the **X** icon next to the course. The course will remain in the database (*with all its item, packet and handout information intact*), but will be removed from the course list on your home page.
3. Click on the arrow next to each course to expand a list of packets or handouts that have been created for that course. System status and class dates are also displayed for each course pack
4. Click on a packet or handout to view or edit its contents.
5. Click directly on a course to access the Shopping Cart for that course.

Part IV: Working with Your Shopping Cart—Adding Items to Your Cart

To begin working on a course, you will first need to add items to your Shopping Cart. There are three ways you can add an item to your cart, by searching the course history for this course or other courses, by searching the database by keyword, or by creating a new item in the database.


Searching For An Item by Course History

If the course you are working on has been taught before, the quickest way to fill your Shopping Cart is by Course History. This will allow you to review the items used, select all those that will be used in the current semester, and add them to your Shopping Cart in a group. You can use the Course History to review a previous offering of the course you are working on, or see what is being used in other courses in this semester or previous semesters.

1. To search for an item by course history, click **Course History** on the blue bar in your Shopping Cart. A search window will open.
2. This search window works the same way as the search window for adding a course to your home page. If you are searching for a specific course, for example an earlier version of your current course, enter the course code and leave the rest blank.
3. To review courses on a particular topic, you can leave the course code blank and simply type a word into the Course Title field. For instance, entering "Globalization" yields a list of 9 courses in API, ISP, PED and the Executive Programs.

Selecting a Course to Review

All courses found in the database that match your search criteria will be displayed.

Request 3.0 [Ed Bernstein's Home](#) > [Shopping Cart](#) 

Search:

ISP475 (Fall 01):European Security (Falkenrath)

Course Code **Section**

Course Title **Instructor(s)**

SEARCH **RESET**

Search Results: 7 records found.

	COURSE ▼	SEMESTER ▼	TITLE ▼	INSTRUCTOR ▼
1.	ISP150_Y	Fall 1999	Seminar: International Security and Political Economy	Falkenrath
2.	ISP150_Y	Spring 2000	Seminar: International Security and Political Economy	Falkenrath
3.	ISP150_Y	Fall 2001	Seminar: International Security and Political Economy	Falkenrath, Richard
4.	ISP150_Y	Spring 2001	Seminar: International Security and Political Economy	Falkenrath, Richard
5.	ISP150_Y	Fall 2000	Seminar: International Security and Political Economy	Falkenrath, Richard
6.	ISP475	Fall 2000	European Security	Falkenrath, Richard
7.	ISP475	Spring 2000	European Security	Falkenrath

1. To sort your list by course, semester, title or instructor, click on the arrow next to the criterion you wish to sort by.
2. Use the **Next** and **Previous** buttons to navigate through the pages if your search results do not all fit on one page.
3. To refine your search, edit your information, and click **Search**. If you change your mind about the refinements, click the **Reset** button to reset the field entries to their last saved version.
4. Once you have located the course and semester you wish to review, click on it to view the packets and handouts that were created for that course.

Adding Items from Course History to Your Shopping Cart

From a specific Course History page, all the items that were included in a course pack or handout for that course during the given semester are available. Items can be previewed online and added to your Shopping Cart.

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Request 3.0

Ed Bernstein's Home > Shopping Cart

ISP475 (Fall '01): European Security (Falkenrath)

[Add selected items to shopping cart](#)

Course History for:
ISP475 (Spring '00): European Security (Falkenrath)

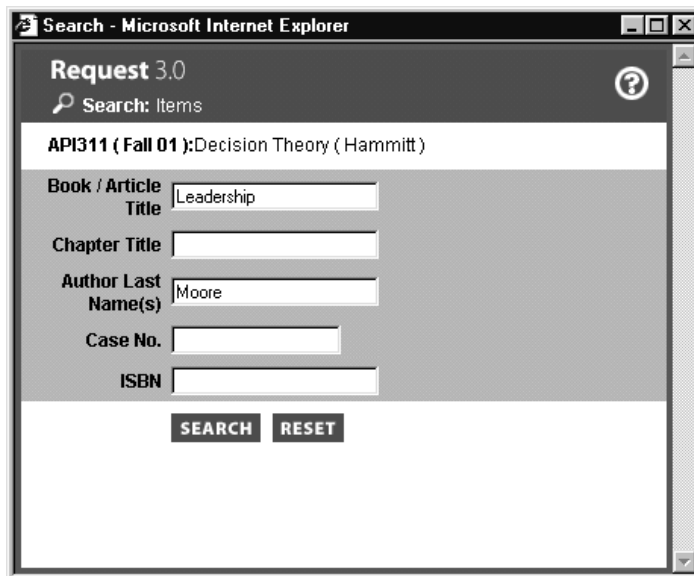
ADD	VIEW	CITATION	TITLE	AUTHOR	COURSE PACK
In cart		Duchene, Francois, <i>European Integration and Disintegration: East and West</i> , French Motives for European Integration, pp.22 - 35, edited by Robert Bideleux, et al (Hampshire : Routledge ©1996)			Packet 1
In cart		Dulles, John Foster, <i>Evolution of Foreign Policy: Speech Before the Council on Foreign Relations</i> , (Washington: U.S. Government Printing Office ©1954), Text of Speech by John Foster Dulles ... January 12, 1954, pp.1 - 10			Packet 1
In cart		May, Ernest R., <i>American Historians and the Atlantic Alliance</i> , The American Commitment to Germany, 1949-1955, pp.52 - 80, edited by Lawrence Kaplan, et al (Kent : The Kent State University Press ©1991)			Packet 1
In cart		Warner, Geoffrey, "Eisenhower, Dulles and the Unity of Western Europe, 1955-1957", <i>International Affairs</i> , 69 (2) (London: Blackwell Publishers), pp. 319 - 329			Packet 1
<input type="checkbox"/>		Warner, Geoffrey, "The United States and the Western Alliance, 1958-63", <i>International Affairs</i> , 71 (4) (London: Blackwell Publishers), pp. 801 - 818			Packet 1
<input type="checkbox"/>		Kugler, Richard L., <i>Commitment to Purpose: How Alliance Partnership Won the Cold War</i> , (Santa Monica: RAND ©1993), pp.123 - 140, 159 - 138			Packet 1
<input type="checkbox"/>		Neustadt, Richard E., <i>Alliance Politics</i> , (New York: Columbia University Press ©1970), The Skybolt Affair, pp.30 - 55			Packet 1

1. The masthead displays the course Shopping Cart you are working with. Below the masthead, you see the course listed whose history you are viewing.
2. To sort the list by title or author, or by course pack, click on the arrow in the header row next to the appropriate criterion.
3. Click on the Camera icon to preview an item. Items that have not yet been scanned into the database cannot be previewed online. For these items, you can click to view the New Item Order Form.
4. To add an item from the database to your Shopping Cart, select the item by checking the box to the left of it. After you have selected all the items you want to put in your Shopping Cart, click **Add Selected Items to Shopping Cart**. The items will be added to the course Shopping Cart you are working with.
5. Use the **Next** and **Previous** buttons to navigate through multiple pages if necessary. To add items from multiple pages, you must click on **Add Selected Items to Shopping Cart** before you move to another page or your selection will be lost.

Searching For An Individual Item

You can search the database for items using whatever information you have, such as all or part of a book, article or case title; chapter title; author last name; case number; or ISBN.


1. To search for an item in the database, click **Search for Material** from within your Shopping Cart. The Search window will open.




The screenshot shows a web browser window titled "Search - Microsoft Internet Explorer". The page content includes a search bar with the text "Request 3.0" and a search icon. Below the search bar, the search criteria are displayed: "Search: Items" and "API311 (Fall 01); Decision Theory (Hammitt)". The search criteria are entered into the following fields: "Book / Article Title" (Leadership), "Chapter Title" (empty), "Author Last Name(s)" (Moore), "Case No." (empty), and "ISBN" (empty). At the bottom of the search criteria section, there are two buttons: "SEARCH" and "RESET".

2. *You do not have to enter the entire title of a book or article. You can enter a portion, but do not limit yourself to a single word. For example, to find “Leadership without Easy Answers”, you can simply type “leadership without”. While typing “leadership” will also summon to your screen “Leadership without Easy Answers”, it will also fill your screen with dozens of other titles containing the word “leadership.”*
3. *Limit searches by author to their last name only. If you are searching for an item by Samuel P. Huntington, simply enter “Huntington”.*
4. *Limit searches of items with multiple authors to one just author. The results you receive will be no different than if you typed in both authors’ names.*
5. *Use part of a title in the title field as well as the author’s last name. If you enter “leadership” in the title field and “heifetz” in the author field, you will get “Leadership without Easy Answers”.*
6. *Searches for HBS cases and Harvard Business Review reprints using the case or reprint number. Use the entire code (e.g., 90608) for Harvard Business Review reprints. For HBS cases, however, use only the last six numbers (e.g., **394-006**, not 9-394-006)*
7. *Searches for KSG cases. Use only the last set of numbers separated by a hyphen (e.g., **1321.0**, not **C18-96-1321.0**)*

Viewing Your Search Results, and Adding Items to Your Shopping Cart

Request 3.0 Eileen Olszewski's Home > Shopping Cart 

 Search: Items




API311 (Fall 01):Decision Theory (Hammitt)

Book / Article Title	<input type="text" value="Leadership"/>	Chapter Title	<input type="text"/>
Author Last Name(s)	<input type="text"/>	Case No.	<input type="text"/>
ISBN	<input type="text"/>		

SEARCH **RESET**

Search Results: 165 records found. [Add New Item](#)

[Add selected items to your shopping cart](#) [Next >](#)

ADD TO CART	CITATION	SORT: TITLE ▼	AUTHOR ▼
1. <input type="checkbox"/>		Kotter, John P., <i>A Force For Change: How Leadership Differs from Management</i> , (New York: Free Press ©1990), Management and Leadership, pp.3 - 18	
2. <input type="checkbox"/>		Samatar, Abdi Ismail, <i>An African Miracle: State and Class Leadership and Colonial Legacy in Botswana</i> , (Portsmouth: Heinemann ©1999), Minding the Merits of the Miracle: The State and Collective Interest, pp.176 - 195	
3. <input type="checkbox"/>		Hammack, David C., <i>An Agile Servant: Community Leadership by Community Foundations</i> , Community Foundations: The Delicate Question of Purpose, pp.23 - 50, edited by Richard Magat (Washington D.C. : The Foundation Center ©1989)	

1. To sort the list by title or author, or by course pack, click on the arrow in the header row next to the appropriate criterion.
2. Click on the Camera icon to preview an item. If there is no camera icon for the item you want, you will need to provide the CMO with a hard copy.
3. To add an item from the database to your Shopping Cart, select the item by checking the box to the left of it. After you have selected all the items you want to put in your Shopping Cart, click **Add Selected Items to Shopping Cart**. The items will be added to the course Shopping Cart you are working with.
4. Use the **Next** and **Previous** buttons to navigate through multiple pages if necessary. To add items from multiple pages, you must click on **Add Selected Items to Shopping Cart** before you move to another page or your selection will be lost. Usually, if your search results list has more than 25 items, you will want to refine your search.
5. You can refine your search by changing or adding entries in the search criteria fields at the top of the page and clicking **Search**. Clicking **Reset** resets the entries to their last saved version.
6. If you cannot find the item you are looking for in the database after refining your search, click **Create New Item** to create a new item in the database.

Creating New Items

Before you create a new item in the database, be sure you have searched the database thoroughly for the item in question. Once you have determined that the item does not exist in the database, you can add it by creating a soft citation for it and submitting a hardcopy or electronic master of the item to the Course Materials Office, following the steps outlined below.

1. Click **Create New Item** from within the Shopping Cart or from your search results page.

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Course Materials Office

Request 3.0 Eileen Olszewski's Home > Shopping Cart

API311 (Fall '01): Decision Theory (Hammitt)

ADD A NEW ITEM

* = Required Field

Item type Book

Title * Business Policy

Editor

et al

Chapter Title Industry Analysis

Author * Bower

2nd Author Bartlett

Page Range * 44-68

ISBN 0-256-11591-5

Publisher Irwin

Copyright Year 2000

File Browse...

ENTER CANCEL

2. First, choose the item type (book, case, online, periodical, or other) you are entering from the Item Type pull-down menu. The required fields will be adjusted for the item type you choose.
 3. Required fields are indicated with a red asterisk. Entering additional fields beyond those required will ensure a greater degree of accuracy. Enter as much information as you have available. If the CMO needs more information than you enter, we will send you an email with the details.
 4. To add non-consecutive pages in the page range field, delineate the items using commas. For instance, you can enter nonconsecutive pages as follows "4, 7, 10-32, 55-67". Enter precisely the page numbers of the reading; any discrepancy between the entry in this field and the required reading will cause trouble later.
 5. Please include any notes at the end of the chapter or the book. It is CMO policy and common practice to include endnotes as a matter of academic courtesy. If, for some reason, the instructor specifically wants to omit the notes, we will create an additional excerpt without the notes; our archive should, however, include a version with the complete notes and references.
 6. You can submit an electronic copy of the file by clicking **Browse** next to the File field, and searching for the file location. Once you have found the file, click on **Open** and the path will appear in the file field.
- NOTE: If you have submitted the document electronically following the directions in step 5, you do not need to submit the New Item Form and hard copy as well.
7. Click **Enter** to submit your item's citation. You will be offered a chance to confirm or edit the information.
 8. Once you have confirmed your citation, a New Item Form will appear. *Print out a copy of this form, and submit it to the Course Materials Office along with a hard copy master of the item.* Please do not staple these items together. Guidelines for a good quality master are available online and should be reviewed before submitting your hard copy.


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Request 3.0 Eileen Olszewski's Home > Shopping Cart

API311 (Fall '01): Decision Theory (Hammitt)

Staff Assistant: Attach this form to the original (do not staple) and bring to the Course Materials Office.

New item scan order



000000000156

PRINT [Print New Item Order Sheet](#)
[Your shopping cart](#)
[Guidelines for a good quality master](#)

ADD [another excerpt from this item](#)

SOFT CITATION

Excerpt type Book (soft citation)

Chapter/Article Title

Book/Periodical Industry Analysis

Author Bower

2nd Author Bartlett

Publisher Irwin

Copyright year 2000.0

ISBN 0-256-11591-5

- The copyright clearance process for a new item cannot begin until the Course Materials Office receives the item, so it is good to do this as far in advance as possible.
- To create another item from this same citation, for instance a different chapter from a book or a second article from the same journal, click on **Add Another Excerpt from this Item**.
- To view the status of a new item, see *Section IX: Tracking Your Packet*.

Part V: Working with Your Shopping Cart—Creating Packets and Handouts

After you have added items to your Shopping Cart, the next step is to create packets or handouts.

- Select **Create Packet** or **Create Handout** from the Course Pack drop-down menu in the Shopping Cart. The packet (or handout) will be assigned to the next available number; if there are three packets already created, the new packet will be packet 4.
- Enter the dates during which you will be using the packet or handout in class. This information will be given to students; it is required. Click **Submit**. The following screen will appear.

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Request 3.0 Eileen Olszewski's Home > Shopping Cart > Edit Packet

API311 (Fall 2001) : Packet 7

COURSE PACKS: -- Choose One --

Packet: 7	Description (max 30 char.)	Class Dates	Options
Status: New 0 Excerpts 0 pages	Module 1: Leadership Diversity	From: 01/09/2002 To: 03/15/2002	Optional Reading <input checked="" type="checkbox"/> Final Packet <input type="checkbox"/> Available Online <input type="checkbox"/>
UPDATE DELETE RESET			
STATUS ▾ VIEW CITATION SORT: TITLE ▾ AUTHOR ▾ SEQUENCE ▾			
There are no items in this Packet. Please go to the Shopping Cart to add items.			

- You may enter a packet description to appear on the cover sheet of the course pack. This is an optional field.
- Select any options that are appropriate to have them printed on the cover page of the packet. Select “Optional Reading” if the packet is not required course reading. Select “Final Packet” if this is the last packet you will be creating for the semester. Select “Available Online” if the entire contents of the packet will be available online. Note that you should only select “Optional” if the readings are not required; for an Online packet containing required readings, only select “Available Online.”
- Handouts do not have cover sheets, and so the Description and Options are not applicable and should be left blank for handouts.
- Click **Reset** if you wish to reset the fields to the last saved instance of the Description and Options, rather than saving your changes.
- Click **Update** to save changes in the Description and Options.
- Click **Reset** if you instead wish to reset the fields to the last saved instance of the data.
- You must return to the Shopping Cart to assign items to the packet or handout.

Part VI: Working with Your Shopping Cart--Assigning Items to Packets and Handouts

Once you have created your packet or handout, you can assign items to it. Assigning items to a packet does not order the packet; once you have finished assigning and editing, you must order the packet (see part VIII).

- Return to the Shopping Cart for the course.

The screenshot shows the 'Request 3.0' interface for the course 'API102 B (Spring '01): Economic Analysis of Public Policy (Schipke)'. The interface includes a header with the John F. Kennedy School of Government logo and 'Request 3.0' title. Below the header, there are navigation links for 'Search for Material', 'Course History', and 'Create New Item'. A table lists three items with columns for Status, Remove, Citation, Title, Author, and Course Pack. Each item has a dropdown menu set to '-- Unassigned --'.

STATUS	REMOVE	CITATION	TITLE	AUTHOR	COURSE PACK
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Olz, John, <i>John's New Book Item</i> , That which does not Kill me makes me stonger, pp.1 - 25, edited by Eileen Olz (: Graham's Publishing, Inc. ©2001)			-- Unassigned --
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Testee, Test, <i>Create A New Item From a 56K Connection</i> , pp.4-42, edited by Graham Clarke, et al (Washington : Norwich Press ©2001)			-- Unassigned --
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Gallup, John Luke and Jeffrey D. Sachs, et al , <i>Annual World Bank Conference on Development Economics 1998</i> , Geography and Economic Development, pp.127 - 178, edited by Boris Pleskovic, et al (Washington : The World Bank ©1999)			-- Unassigned --

- By default, only unassigned items will be shown. If there are no unassigned items, you will see a message to that effect. To view all items; items assigned to particular packets or handouts; or only the locked or the unlocked items, click on the View pull-down menu. Locked items are items that have been assigned to a packet or handout that has been submitted for production. They are no longer available for you to reassign to another packet or handout. Unlocked items are items that have not yet been submitted for production, whether they have been assigned to a resource or not; you can reassign or unassign them as you wish.

- Sort the list by title, author, status, or resource assignment by clicking on the arrow next to the appropriate criterion.
- Preview items by clicking on the camera icon. Items whose master copies have not been scanned into the database are not available for preview, nor can they be assigned. Instead you may access the New Scan Item Order Form generated for this New Item by clicking the 'Order Form' link.

NOTE: It is your responsibility to ensure that the items you assign to packets and handouts are, in fact, the items required. Please preview items for accuracy and legibility.

- Assign items to packets by clicking on the Course Pack pull down next to the item and selecting the desired Course Pack assignment. It is recommended that you add items to a packet in the order you wish them to appear, although you will have a chance to resequence them later. You may make as many assignments as you wish (or unassign items). *Once all assignments are made you must click the red 'SUBMIT: Course Pack Assignments'*

NOTE: Leaving the Shopping Cart prior to submitting your course pack assignments will result in loss of those assignments.

- New items that have not yet been scanned into the database cannot be assigned to a packet. To assign these items, you will need to wait until the CMO has received the item, confirmed its citation, scanned it, and added it to the archive. You can then return to the Request system to assign the item.
- Remove any items you do not wish to use in this course for this semester from your Shopping Cart by clicking on the X icon next to the item. *The item will be removed from your Shopping Cart but not from the database.* If the item is needed in this or other courses, it will be available through a search.

Part VII: Editing Packets

Once you have assigned items to a packet, you have the opportunity to modify the description of the packet, the class dates, and your optional information. You can resequence the items in the packets or remove items from your packet. You can view the status of the copyright clearance for each item and you can preview the items.

Request 3.0 Eileen Olszewski's Home > Shopping Cart > Edit Packet

JOHN F. KENNEDY SCHOOL OF GOVERNMENT HARVARD UNIVERSITY Course Materials Office

API311 (Fall 2001) : Packet 3













Order Packet View/Print TOC COURSE PACKS: - Choose One -

Packet: 3 Status: New 4 Excerpts 75 pages	Description (max 30 char.)	Class Dates	Options
	test	From: 10/10/2001 To: 11/02/2001	Optional Reading <input type="checkbox"/> Final Packet <input type="checkbox"/> Available Online <input type="checkbox"/>
<input type="button" value="UPDATE"/> <input type="button" value="DELETE"/> <input type="button" value="RESET"/>			
STATUS ▼	VIEW	CITATION	SEQUENCE ▼
<input type="radio"/>	<input type="button" value="X"/> <input type="button" value="Camera"/>	Keeter, Scott and Carolyn Muller, et al, "Consequences of Reducing Nonresponse in a National Telephone Survey", <i>Public Opinion Quarterly</i> , 64 (Ann Arbor: American Association for Public Opinion Research), pp. 125 - 148	1 ▼
<input type="radio"/>	<input type="button" value="X"/> <input type="button" value="Camera"/>	Tzu, Han Fei, <i>Basic Writings</i> , (New York: Columbia University Press ©1964), pp.101 - 107	2 ▼
<input type="radio"/>	<input type="button" value="X"/> <input type="button" value="Camera"/>	International Committee of the Red Cross, <i>War, Money, and Survival</i> , (Geneva: International Committee of the Red Cross ©2000), War, Money and Survival: Setting the Stage, pp.4 - 39	3 ▼

1. Click on **Edit Packet (n) or Edit Handout (n)** from the Course Pack pull down menu from your Shopping Cart, or click on a packet from the expanded course information on your personal home page. The Packet Editor page displays.
2. Your packet information, including the status (new or submitted for production); number of items and number of pages appears in the upper left hand corner of the page.
3. Edit your packet description, class dates, and options as desired and click **Update**.
4. To set the order the Items will appear in your packet, use the Sequence pull down menu next to each item. To move an item to the beginning of the packet, select 1 from the pull-down menu; similarly, to move an item to the end, select the highest number the menu shows. You can change the order of items as many times as you like before submitting your packet for production.
5. To remove an item from your packet, click on the **X** icon next to the item. The item will be returned to your Shopping Cart as unassigned.
6. You can delete the packet by clicking **Delete**. All items assigned to a deleted packet will be returned to the Shopping Cart, and the packet or handout will be removed from your list. You can only delete the last packet you have created. For instance, if you have created four packets, you cannot delete number 3 unless you delete number 4 first.
7. Click **View/Print TOC** to see what your table of contents will look like. *Note:* the page numbers are added to the table of contents after it has been submitted to production, so a ToC viewed before that occurs will not show page numbers.

Part VIII: Ordering a Packet

Once you have confirmed that all your information is correct you can submit your packet for production. *Until the packet is submitted, the CMO will not begin to make copies for distribution.* Remember that while you are in the editing process, you can print out the TOC for approval, and revise it as often as necessary. Once you submit your packet for production it will become locked as well as all of the items in it, meaning that you will no longer be able to edit it or assign items in it to another packet for the same course.

 JOHN F. KENNEDY SCHOOL OF GOVERNMENT HARVARD UNIVERSITY Course Materials Office		Request 3.0		Eileen Olszewski's Home > Shopping Cart > Edit Packet		
 API311 (Fall 2001) : Packet 3 Order Form						
ID: 1886 Packet 3 Status: New 4 Excerpts, 75 pages	Description (max 30 char.) <input type="text" value="Module 1"/>	Class Dates From: <input type="text" value="01/23/2002"/>    To: <input type="text" value="03/15/2002"/>   	Options Optional Reading <input checked="" type="checkbox"/> Final Packet <input type="checkbox"/> Available Online <input type="checkbox"/>			
Notes to Class (max 255 char.) (printed on cover sheet) <input type="text" value="Please read this packet before coming to class on January 23."/>		<div style="border: 1px solid black; padding: 5px;"> Ordered by: Eileen Olszewski () Date Submitted: Phone (if different from above): <input type="text" value="295-1232"/> </div>				
Quantity Required: <input type="text" value="35"/> Date Required: <input type="text" value="01/16/2002"/>   	CMO special instructions <input type="text" value="I not be able to access email during the week of Jan 8-16. Please contact me via phone"/>					<div style="border: 1px solid black; padding: 5px; background-color: #333; color: white; width: 60px; margin: 0 auto;"> SUBMIT </div>

1. Click on **Order Packet** from the Edit Packet screen to submit your order for production.
2. Review the description, class dates and options and edit as necessary.
3. Add any notes to the class that you would like to appear on the cover sheet. This is an optional field.
4. If applicable, add a second phone number where you can be reached by the Course Materials Office in case of problems with the packet.
5. Fill in the quantity required. The Course Materials Office may adjust this number for final production at their discretion.
6. Fill in the date you would like the packet to be available for distribution.
7. Fill in any special instructions (such as colored paper, or binding) for the Course Materials Office if applicable.
8. Click **Submit**. Your items will now appear with a lock item next to them, meaning they are locked and can no longer be added to packets, removed from this packet or resequenced within your packet. The status of your packet changes to “Submitted for Production”.
9. If you need to make changes to a packet after it has been submitted for production, you must call the Course Materials Office directly.

NOTE: You must submit the packet (or handout) in order for the CMO to make copies for distribution. Although the Copyright Service Center will process permissions for items in the Shopping Cart or in a packet, the CMO will only make and distribute packets and handouts which have been ordered.

Part IX: Tracking Your Packet

You can track the status of packets from your personal home page or from the Shopping Cart for that course.

1. From your personal home page, click on arrow next to the appropriate course to expand all the packets and handouts for that course with their status. Alternately, go to the Shopping Cart, and click on Edit Packet from the Course Packet pull down menu.
2. A status of “New” indicates that the packet has been created but not yet submitted for production. A status of “Submitted for Production” indicates that the packet has been ordered but is not yet available for distribution. A status of “Approved” indicates that the CSC has reviewed the packet and given the CMO approval to proceed.

To view the copyright status on individual items in a particular packet or handout, click the packet.

3. The item status codes will be updated as copyright approval is granted from copyright owners for each item.

A status code of **white** indicates that this is a new item added to your Shopping Cart, and is awaiting processing by the Course Materials Office.

A **yellow** status code indicates that the item has been submitted for copyright approval.

A **green** status code indicates that copyright approval has been granted.

A **red** status code indicates that the copyright owner has denied copyright clearance.