

2020

# OnBase Bachelor's— Accelerated Master's Program Intent Form Administration Guide



Office of the Registrar  
UNIVERSITY OF COLORADO **BOULDER**

Revised 9/25/2020

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## Quick Reference for Department Admins

	<p>1. The department admin will receive an email notification indicating that a student has submitted the BAM intent form.</p>
	<p>2. Open OnBase:</p> <ul style="list-style-type: none"> <li>• <a href="https://dm.prod.cu.edu">https://dm.prod.cu.edu</a> – Production site</li> <li>• <a href="https://dm-tst.qa.cu.edu">https://dm-tst.qa.cu.edu</a> – Test site</li> </ul> <p>3. Navigate to Workflow ( → Workflow → Open Workflow).</p> <p>4. Navigate to the “B - REG - [Department]” life cycle. <i>See the “OnBase Web Client” section for navigation details.</i></p> <p>5. Open the “B - REG - BAM - [Department] Inbox” queue. Submissions in this queue have not begun the review process.</p>
	<p>6. Attach additional supporting documents and letters of recommendation, if available.</p>
	<p>7. Generate a packet to help with the review process.</p>
	<p>8. Select the submission (you can select multiple submissions at one time) and move it to the “B - REG - BAM - [Department] Review” queue. To move all selected submissions, click the “Review” button.</p>
	<p>9. Review the submissions and make a determination. Click the appropriate option for the decision:</p> <ul style="list-style-type: none"> <li>• Click “Approve” to approve the application.</li> <li>• Click “Deny” to deny the application.</li> </ul>

## Process Summary

This section is a summary of the bachelor's–accelerated master's intent form submission and workflow process from start to finish.

	<p>The student will submit the electronic form, attaching any required supporting documents.</p> <p> The “Letter of Recommendation” attachment control is not available to students. Staff can attach letters of recommendation in the OnBase workflow after the form is submitted.</p>
	<p>The workflow will send a confirmation email to the student acknowledging receipt of their request. The confirmation email will include the details of their request, including the acknowledgments agreed to in the form.</p>
	<p>The workflow will send a notification email to the department notifying them that a new request is awaiting their approval in the department inbox queue. The submitted form and any supporting documents will be attached to the email.</p>
	<p>Letters of recommendation and other supporting documents can be uploaded at any time from this point forward. See the <a href="#">Attachments</a> section for instructions.</p>
	<p>The department admin can generate a packet for each submission by right-clicking and selecting “Generate Packet.”</p> <p>The packet generated combines the original form submission and all attachments into a single PDF that can be printed, downloaded, and saved or discarded.</p> <p>The packet will always be available in OnBase for retrieval.</p>
	<p>When ready to begin the review process, the department admin will select one or more submissions in the department inbox and click the “Review” button.</p> <p>This will move the selections to the “Department Review Pending” queue and update the status in the form.</p> <p>The form will remain in this queue until the department admin enters a decision.</p>
	<p>When the request is denied, the form is moved to the denied queue and an email notification is sent to the student with any comments the admin added to the form.</p> <p>The form will remain in the denied queue for 30 days. During this 30-day period, the department admin will have the opportunity to send the form back through the workflow for another review or approve it to be processed.</p> <p>After the 30-day period has ended, the form will be removed from the workflow and the workflow will end. The form will remain in OnBase.</p>
	<p>When the request is approved, the status is updated in the form and the workflow checks if the student is an international student.</p>

	<p>If the student is an international student, approval is required from International Student and Scholar Services (ISSS). A notification is sent to that office requesting review and approval. The form will remain in the “International Student Approval” queue until ISSS enters a decision.</p>
	<p>When the request is denied by ISSS, the form is moved to the denied queue and an email notification is sent to the student and the graduate school admin with any comments the ISSS admin added to the form.</p> <p>The form will remain in the denied queue for 30 days. During this 30-day period, the graduate school admin will have the opportunity to send the form back through the workflow for another review or approve it to be processed.</p> <p>After the 30-day period has ended, the form will be removed from the workflow and the workflow will end. The form will remain in OnBase.</p>
	<p>After both department and ISSS approval (when applicable), the form will move to the “Ready” queue in the BAM life cycle.</p>
	<p>Approved requests will remain in the Ready queue until processed. A robot will process all the approved requests.</p> <p>After processing, the status will be updated in the form and the form will be removed from the workflow.</p> <p>The form will remain in OnBase.</p>

## Accessing OnBase

UIS has provided multiple ways to access OnBase within the university. This document discusses two of these access methods.

- **CU Resources**

- Log in to CU Resources with your IdentiKey and password.
- Select Business Tools > OnBase DM from the menu.
- This option opens the OnBase Web Client within CU Resources.

- **OnBase Web Client**

- Click a link below to access the OnBase Web Client through your browser:
  - <https://dm.prod.cu.edu> – Production site
  - <https://dm-tst.ga.cu.edu> – Test site
- This will prompt you to log in with your IdentiKey and password, then open the OnBase Web Client in your browser.



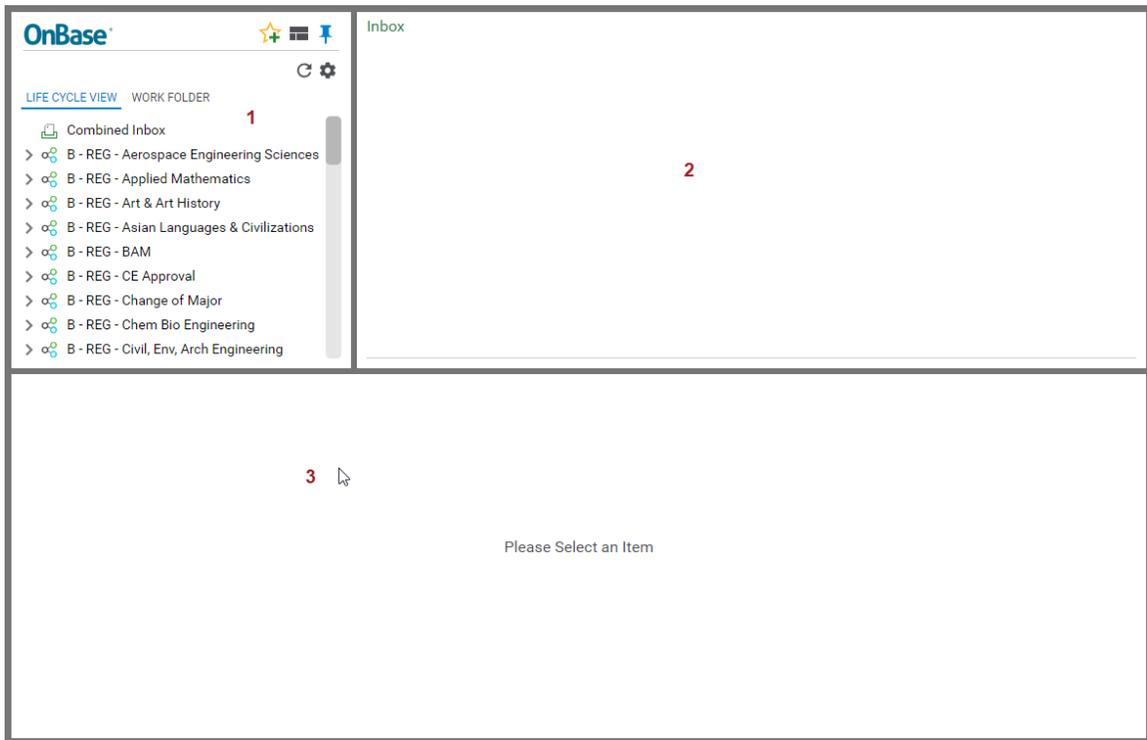
**Browser Restriction:** OnBase does not support workflow in the Microsoft Edge browser. If you do not see Workflow as an option in the OnBase Web Client menu, make sure you are not using the Microsoft Edge browser. Email [reghelp@colorado.edu](mailto:reghelp@colorado.edu) if this does not resolve the problem.

Two additional options, OnBase Unity Client and Microsoft Outlook Add-in, require software installed on your computer and an OnBase username and password. If you would like to have one or both of these installed, send an email to [reghelp@colorado.edu](mailto:reghelp@colorado.edu) requesting your OnBase login and software install.

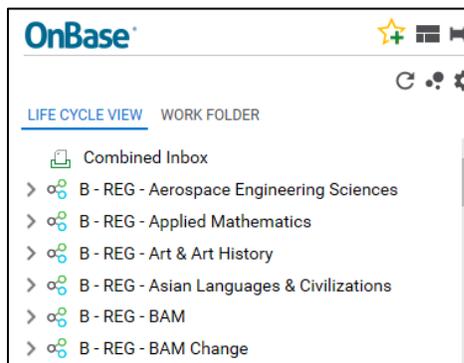
## OnBase Web Client

The OnBase Web Client is the default interface for OnBase. This document will cover the workflow option only.

1. Select the menu icon in the upper left corner of the OnBase Web Client to see the menu options.
2. Locate the “Workflow” header and select “Open Workflow.” If you don’t see the “Workflow” header:
  - a. Make sure you aren’t using the Microsoft Edge browser. Microsoft Edge version 44.18362.449.0 works with OnBase; older versions may not.
  - b. If you are using a supported browser, send an email to [reghelp@colorado.edu](mailto:reghelp@colorado.edu) and request workflow access.
3. A new window will open with three panes: navigation (1), list (2) and display (3).
4. The navigation pane has two tabs: “Life Cycle View” and “Work Folder.”

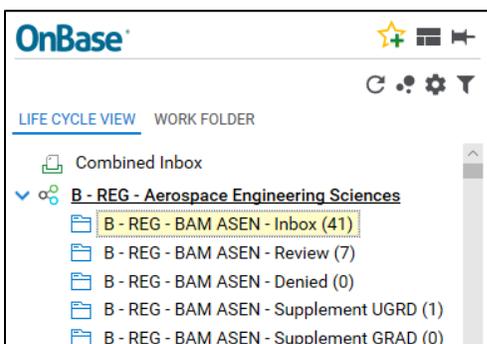


5. With “Life Cycle View” selected in the navigation pane, you should see a list of life cycles to which you have access. This list will be different for each person according to their permissions.



The B - REG - BAM life cycle is the main workflow life cycle for BAM submissions. Department admins will work in the life cycle named for their department: Aerospace Engineering Sciences, Applied Mathematics, etc.

6. Click the arrowhead next to the life cycle to show the queues in that life cycle. The number next to each queue indicates the number of forms in that queue.



## Department Admin

The department admin is responsible for ensuring that the submissions are reviewed for approval in a timely manner. To accomplish this, the department admin will work primarily within the inbox and review queues in the department life cycle.

The department's inbox queue is intended to be a holding area for submissions that have not been reviewed. All new submissions enter this queue and will remain there until the department admin moves them to the review queue.

The department's review pending queue is intended to be a working area for submissions that are in the review process. The department admin will move new submissions to this queue when review is ready to begin.

At any point in this process, the department admin can upload additional supporting documents, including letters of recommendation.

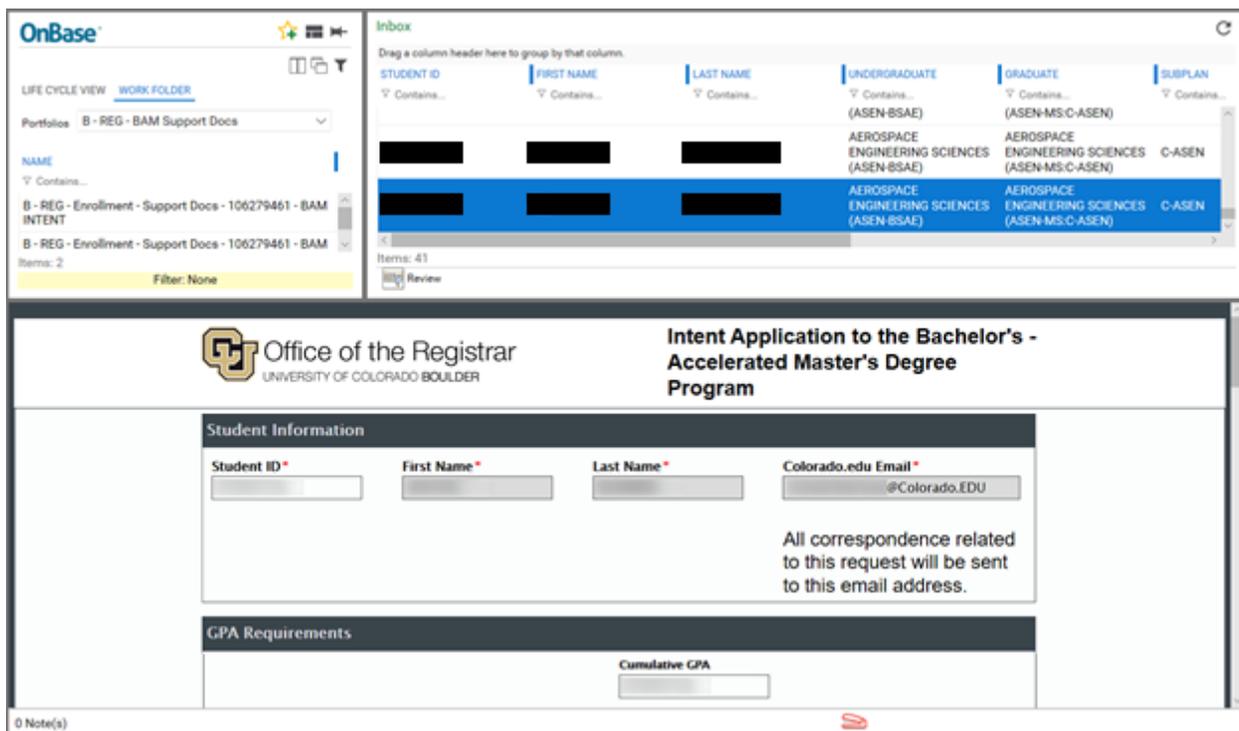
## Department Inbox Queue

The department's inbox queue contains all new form submissions that have not begun the departmental review process.

Click the queue to show the form submissions waiting in that queue. The list of submissions in the queue is displayed in the upper right pane.



Click on a submission to select it. A mostly read-only copy will display in the lower pane.



Notice the “Work Folder” tab in the upper left pane. In this example, the B - REG - BAM Support Docs portfolio is selected and two student-uploaded support documents are visible.

The “Portfolios” drop-down can display support docs, letters of recommendation or packets.

In this queue, the department admin can:

- Attach letters of recommendation to the selected form.
- Enter comments to the selected form that are *visible to the student* (scroll down to the bottom of the display pane to add comments).

- Generate packets for use in the review process (right click the item in the inbox pane and selecting “Generate Packet”).
- Select the form for review (click the “Review” button).

## Review

When a submission is ready for review, the department admin will move it to the “Department Approval Pending” queue.

1. Select one or more documents to move.
2. Click the “Review” button below the selected document.

## Department Review Queue

The department’s review queue contains all form submissions that are currently under review (i.e., for which a determination has not yet been made).



After department review, the department admin will enter the determination for each submission (or multiple selections, if selected) by clicking the “Approve” or “Deny” button at the bottom of the inbox view.

Once the determination has been selected, the form will move forward in the workflow.

## Printing Submissions

The department admin may want to print a submission to be used in the review process. The initial notification email will include copies of the submitted form and student-uploaded supporting documents, which can be printed like any email attachment.

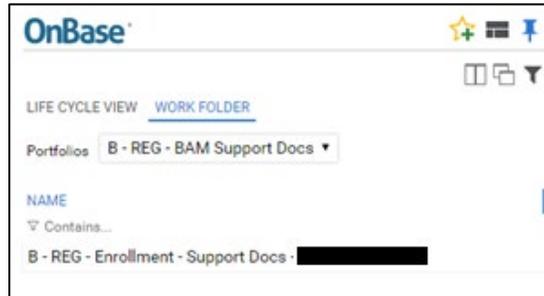
Another option is to print a document packet: a collection of documents combined into a single PDF that can be downloaded and/or printed. When generating a packet, a new window is opened, so ensure that pop-ups are enabled for the site. Packets can be printed, downloaded, saved in OnBase or discarded.



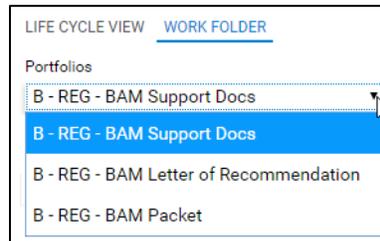
You must enable pop-ups to generate a packet. If pop-ups are not enabled, the packet will not be generated. The OnBase browser will not display any indication that a problem occurred.

## Attachments

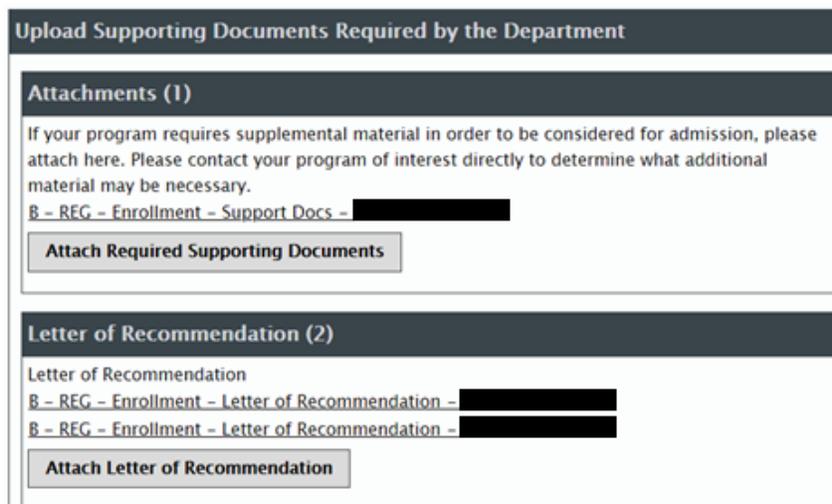
The “Work Folder” tab in the upper left contains supporting documents that were attached to the form.



The “Portfolios” drop-down allows you to switch between different types of attachments.



You can attach additional supporting documents in the lower pane. Note that the “Letter of Recommendation” upload is only available to staff.



Multiple documents of either type can be uploaded one at a time.

## Document Packets

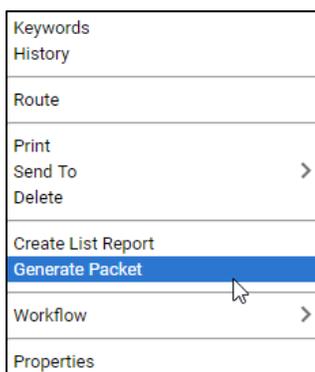
A document packet combines the main form and all attachments into a single PDF and stores it in OnBase. The document packet will have the same document type as the original submission, B - REG - Enrollment BAM.



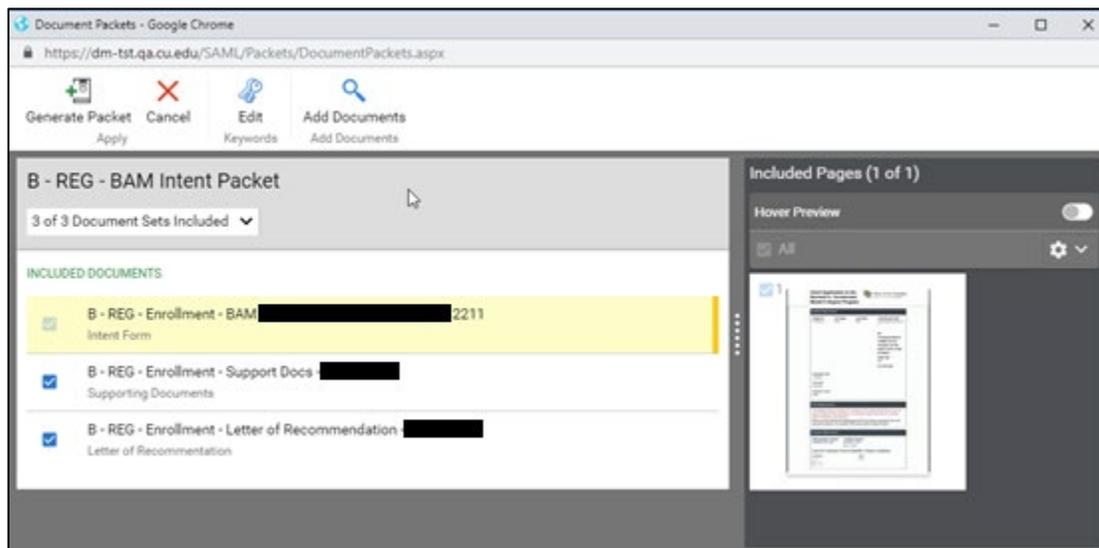
You must enable pop-ups to generate a packet. If pop-ups are not enabled, the packet will not be generated. The OnBase browser will not display any indication that a problem occurred.

To generate a packet:

1. Right-click on the primary document and select “Generate Packet” from the context menu.



2. The “Packet Content Selection” window will open. If it doesn’t, check your pop-up blocker settings.



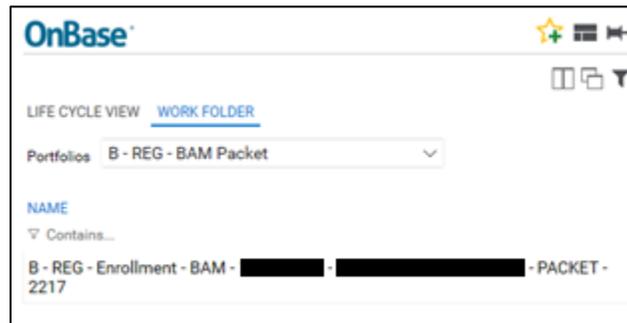
3. Check or uncheck the documents to include in the generated PDF. Note that the original main submission cannot be unchecked. You can add other documents if needed (e.g., transcripts) using the “Add Documents” option in the menu.

4. A preview is displayed at the right of the window. You may click each document individually to change the preview at the right.
5. Select “Generate Packet” to generate the document. It will open the new PDF in a separate window, where you can download or print it if desired. The generated packet is also saved in OnBase for future retrieval.



Although the newly generated PDF is saved in OnBase and is assigned to the B - REG - Enrollment - BAM document type, it will not go through workflow, so you will not see it in the workflow queues.

6. Packets can be viewed in the workflow by selecting “B - REG - BAM Packet” from the “Portfolios” drop-down on the “Work Folder” tab. Double-click the packet to open in.



## Workflow Status

At the bottom of the form is an “Administration” section that shows the current status of the Department and ISSS approval processes, as well as the status of the overall workflow process. The approver can enter comments if desired.

Status and approver name fields are read-only. These will be set automatically by OnBase as the workflow progresses.

Administration	
<b>Department Approval Status</b> Approved	<b>Department Comments (Student Visible)</b> Dept comments
<b>Approver</b> Cindi Lee - CUBLD REG Repo	
<b>ISSS Approval Status</b> N/A	<b>ISSS Comments (Student Visible)</b>
<b>Approver</b>	
<b>Processing Status*</b> COMPLETE	

## OnBase Resources

OnBase is managed by the Enterprise Content Services (ECS) team in UIS. ECS maintains an area on their website dedicated to CU OnBase users and administrators, which includes many useful links to help you learn more about OnBase.

- [Enterprise Content Services – OnBase](#)
- [OnBase New Customer Information](#)
- [OnBase Training](#)
- [Learning Opportunities](#)