

OnBase Bachelor's - Accelerated Master's Program Supplement Advisor Guide

OFFICE OF THE REGISTRAR, CU BOULDER
CINDI LEE

UNIVERSITY OF COLORADO AT BOULDER

Contents

Process Summary.....	2
Background.....	4
Accessing OnBase.....	4
OnBase Web Client.....	5
Advisor.....	7
<i>Department</i> Supplement Queue.....	7
Editing the Class List.....	8
Complete Review.....	8
BAM Supplement Form.....	10
OnBase Resources.....	14

Process Summary

This section is a summary of the Bachelor's – Accelerated Master's Supplement form submission and workflow process from start to finish.

	The student will submit the electronic form, designating classes that will apply toward their undergraduate degree, master's degree or both.
	The workflow will send a confirmation email to the student acknowledging receipt of their request.
	The workflow will send a notification email to the undergraduate advisor requesting review of the class selections and certification that the student is on track to complete their undergraduate degree.
	If necessary, the undergraduate advisor can edit the class list, changing how each class is applied towards the degree.
	<p>After reviewing the form and making any necessary adjustments to the class list, the undergraduate advisor must select a new status for the form.</p> <p>There are three status options:</p> <ol style="list-style-type: none"> 1) "I agree to the above statement" – This certifies that the student is on-track to complete their undergraduate degree this semester, with all required coursework in progress this semester. 2) "Additional requirements exist and can be fulfilled within the semester" - Explain the additional requirements that must be fulfilled within the semester 3) "Deny request. Student should discuss requirements with advisor and resubmit." <p>Denied requests will be removed from the department life cycle.</p> <p>The advisor should reach out to the student to discuss the reasons for the denial, and to advise the student on the remaining requirements, timing for re-submission of the form, timing for award of the bachelor's degree, etc.</p> <p>Don't forget to click the "Submit Form" button to save the changes.</p>
	To complete the review process and move the form forward in the workflow, the undergraduate advisor must click the "Complete Review" button in the workflow window.
	If certified by the undergraduate advisor, the workflow will move the form to the GRAD queue and send a notification email to the master's program advisor requesting review and certification.

	<p>If necessary, the master's advisor can edit the class list, changing how each class is applied towards their degrees.</p> <p> If the class list is edited, the form will be sent back to the undergraduate advisor to review and re-certify. After recertification, the form will return to the GRAD queue to be reviewed and certified.</p>
	<p>After reviewing the form and making any necessary adjustments to the class list, the master's program advisor must select a new status for the form.</p> <p>There are three status options:</p> <p>1) "I agree to the above statement" – This certifies that there is no additional coursework taken during the undergraduate career that will be applied.</p> <p>2) "Changes necessary, return to the undergraduate advisor for recertification" - Edit the course list and return the form to the undergraduate advisor for re-certification</p> <p>3) "Deny request, student should resubmit after working with undergraduate advisor"</p> <p>Denied requests will be removed from the department life cycle.</p> <p>The master's program advisor should reach out to the undergraduate advisor and student as appropriate to discuss the reasons for the denial and advise the student on what is necessary to re-submit the form for review.</p> <p>Don't forget to click the "Submit Form" button to save the changes.</p>
	<p>To complete the review process and move the form forward in the workflow, the master's program advisor must click the "Complete Review" button in the workflow window.</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 be added to the student's OnBase record. It will be used upon certification of the master's degree.</p>

Background

BAM programs allow students to take up to and including 12 credits while at UG status, which can later be used toward the master's degree. A certain number of those credits may be double counted toward both the bachelor's and master's degrees. The supplement form is necessary to confirm which courses are being used toward both degrees and which courses will be used later only for the master's degrees.

It is essential that the undergraduate and graduate programs certify the same courses in each category. The form allows students to identify the courses; the limits are built into the form. These courses should be identifiable in the student's final semester. They should fill the form at the same time they apply to graduate with the bachelor's degree and submit the master's continuation form. Close collaboration will be necessary between the undergraduate and graduate advisors throughout the process.

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
 - You can access the OnBase Web Client via a URL, without going through CU Resources.
 - <https://dm.prod.cu.edu> – Production site
 - This will prompt you to log in with your Identikey and password, and then open the OnBase web client in your browser.

Two additional options, OnBase Unity Client and Microsoft Outlook Add-in, require software installed on your computer. If you would like to have one or both of these installed, send an email to Help@colorado.edu or RegHelp@colorado.edu to request the software install.

OnBase Web Client

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

- Select the menu icon  in the upper left corner of the OnBase Web Client to see the menu options.
- Locate the **Workflow** header and select **Open Workflow**.

WORKFLOW

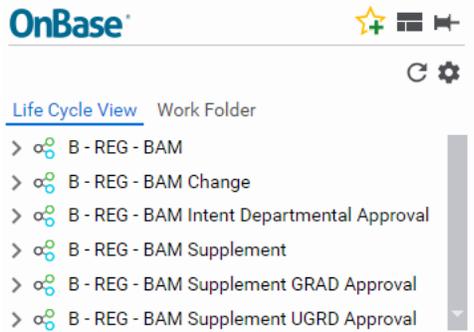
Open Workflow

- If you don't see the Workflow option
 1. Make sure you are not using an old version of the Microsoft Edge browser. Note: Microsoft Edge version 44.18362.449.0 or newer works with OnBase. Older versions may not.
 2. If you are using a supported browser, send an email to RegHelp@colorado.edu and request workflow access.
- A new window will open with three panes: 1. Navigation pane, 2. List pane, 3. Display pane.
- The navigation pane has two tabs, LIFE CYCLE VIEW and WORK FOLDER.



With "LIFE CYCLE VIEW" selected in the navigation pane, you should see a list of life cycles to which you have access.

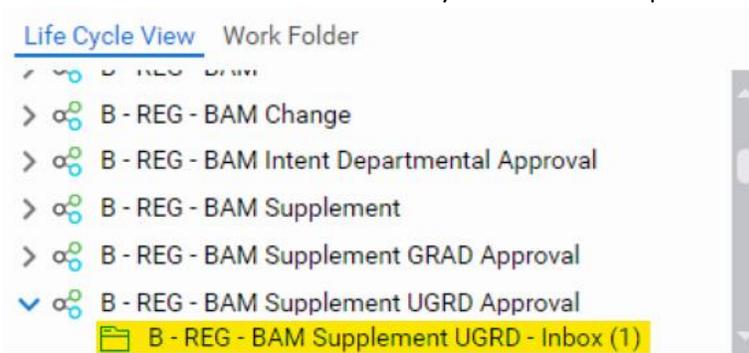
This list will be different for each person according to his or her permissions.



The B – REG – BAM Supplement life cycle is the main workflow life cycle for BAM Supplement form submissions. All form submissions start in this life cycle and are routed to the appropriate department life cycle according to the student's BAM program.

Advisors will work in the life cycle named for their department: Aerospace Engineering Sciences, Applied Mathematics, etc.

Click the arrowhead next to the life cycle to show the queues in the life cycle.



The number next to each queue indicates the number of forms in that queue.

Advisor Review

The advisors are responsible for ensuring that the class selections are accurate, appropriate for double counting or use toward the master's degree as stated, and do not exceed maximums allowed for the program. The undergraduate advisor will also certify that the student is on-track to graduate with their bachelor's degree. The master's program advisor will certify the class selections and approve the form for processing.

BAM Supplement Approval Life Cycles

Forms requiring review and certification are sent to the B – REG - BAM Supplement UGRD Approval life cycle. New submissions and previously certified submissions sent back for recertification from the master's advisor are in this folder.

Forms that have been reviewed and approved by the undergraduate advisor are sent to the B – REG – BAM Supplement GRAD Approval life cycle for Master's program advisor review.

Click the Inbox 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 form to select and open the form in the lower pane.

The screenshot displays the OnBase software interface. The top left shows the OnBase logo and navigation options like 'Life Cycle View' and 'Work Folder'. The main area is divided into two panes. The upper right pane, titled 'Inbox', shows a table of form submissions with columns for 'Last Name', 'First Name (Preferred)', 'Student ID', 'Program', and 'Plan'. A single submission is visible with Student ID 109402918 and Program ENGRG. The lower pane shows a preview of a 'Bachelor's-Accelerated Master's (BAM) Program Supplement Form' from the University of Colorado Boulder. The form includes instructions, submission deadlines (October 1 for fall, February 1 for spring, March 1 for summer), and a 'Student Info' section with fields for Student ID, First Name, and Last Name.

Last Name	First Name (Preferred)	Student ID	Program	Plan
[Redacted]	[Redacted]	109402918	ENGRG	EEEN-MS

Graduate School
University of Colorado **Boulder**

Bachelor's-Accelerated Master's (BAM) Program Supplement Form

Please work closely with your undergraduate and graduate advisors before completing this form. The form should be filled out in the senior year, when you apply to graduate with the bachelor's degree and submit the master's continuation form. This form should be submitted by:

- October 1 for fall graduates
- February 1 for spring graduates
- March 1 for summer graduates.

Student Info

Student ID	First Name *	Last Name
------------	--------------	-----------

0 Note(s)

Except for the advisor comments and certification options, the form in the lower pane is read-only.

Edit the Class List

Review the class list selections submitted by the student.

You can edit the class list selections by clicking the Edit Course List button  located below the class list. The “Apply to” control Bachelor's Only Master's Only Both for each class is set to “Bachelor's Only”, “Master's Only”, or “Both”. You can change the selection in this control for each class. You must ensure that the maximums are not exceeded.

Undergraduate Advisor

After the undergraduate advisor has reviewed and approved the class list, the form will be sent to the master's program advisor for review and approval. If changes are made, please reach out to discuss with the student so they understand the way the coursework applies and agree with your assessment.

Master's Program Advisor

The master's program advisor must review the class list. If changes are made to the class list by the master's program advisor, the form will be sent back to the undergraduate advisor for recertification. Again, please reach out to discuss with the student.

Select an Approval Status

The advisor must select an option to set the review status of the form.

Undergraduate Advisor

The student is on track to graduate with a bachelor's degree, with all required coursework in progress this semester.

- I agree to the above statement
- Additional requirements exist and can be fulfilled within the semester
- Deny request. Student should discuss requirements with advisor and resubmit (please explain)

Master's Program Advisor

The above listed coursework has been reviewed and approved. There is no additional coursework taken during the undergraduate career which will be applied to the master's degree requirements or double counted toward both degrees.

- I agree to the above statement
- Changes necessary, return to the undergraduate advisor for recertification
- Deny request, student should resubmit after working with undergraduate advisor (explain below)



Don't forget to click the “Submit Form” button to save your changes!

Complete Review

The final step in the advisor review process is to click the Complete Review button. This will cause the form to move along in the workflow.

If the advisor has not made a determination, the form will not be removed from the Approval workflow. It will remain in this queue until a review option has been selected and saved, and the Complete Review button clicked.

BAM Supplement Form

Students will access the form via a link on the BAM website. When the student clicks the link, they will be prompted to log in with their identikey. The form will auto-populate their student id, name, email address and program information.

If the student is not enrolled in a BAM program, the form will display an appropriate message and the student will not be able to continue.



Graduate School University of Colorado Boulder Bachelor's-Accelerated Master's (BAM) Program Supplement Form

Please work closely with your undergraduate and graduate advisors before completing this form. The form should be filled out in the senior year, when you apply to graduate with the bachelor's degree and submit the master's continuation form. This form should be submitted by:
October 1 for fall graduates
February 1 for spring graduates
March 1 for summer graduates.

Student Info		
Student ID 810455207	First Name [REDACTED]	Last Name [REDACTED]
Email Address [REDACTED]@Colorado.EDU		
Undergraduate Plan [REDACTED]	BAM Program * [REDACTED]	

This form is intended for Bachelor's / Accelerated Master's program participants that are close to completing their bachelor's degree. You are not currently enrolled in a Bachelor's / Accelerated Master's program.

The Graduate School | University of Colorado Boulder
bamprogram@colorado.edu

A student that is a BAM program participant, will see their program information displayed.

Student Info		
Student ID 810586397	First Name [REDACTED]	Last Name [REDACTED]
Email Address [REDACTED]@Colorado.EDU		
Undergraduate Plan Aerospace Engineering Sciences		BAM Program* C-ASENP

The maximum allowed double-counted and master's credits for the student's program are shown in the next section. Also shown are the total selected in the class list (next section)

Class Selection		
<small>BAM students may take up to and including 12 hours of coursework (as an undergraduate), which can later be applied to the accelerated master's degree. A certain number of credits can double count for both the undergraduate and the graduate portions of a BAM. This number is program specific, and the "Double Counted Credits Allowed" box below displays those credit amounts.</small>		
Double Counted Credits Allowed 6	Master's Credits Allowed 12	Classes shown: 5000+ level
Double Counted Credits Selected 0.00	Master's Credits Selected 12.00	Show More Classes 
<small>If your program allows 4000-level courses to double count toward the bachelor's and master's degrees, click the "show more classes" button above to include 4000-level courses.</small>		

Any 5000-level courses you have taken while at undergraduate status will display below. Use the "Apply to" column at right to select whether each class will be used toward the bachelor's degree only, master's degree only, or both degrees. See the "class selection" section for the number of credits allowed, which will update to show the remaining available number of credits as you go.

When you submit this form, it will go to the appropriate undergraduate and graduate contacts in your program for approval. You will receive notification when we've received the completed form. If there are changes to your degree plan after submission of this form, contact your advisor.

The form displays the student's classes in batches, 5000-level and above first, then 4000-level, and finally 3000-level, each retrieved when the student clicks the "Show More Classes" button.



If the student has not taken any 5000-level classes, the form will automatically show the 4000-level classes. The form will never show any classes lower than 3000-level.

The student must choose how to apply each class: Bachelor's Only, Master's Only, or Both. Classes taken while at graduate status will not be calculated in the totals.

Class List					Add
Course Title	CourseID	Semester	Credit Hours	Grade	
Fund of Systems Engineering	EMEN5405-001	Fall 2020	3		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					
Engr Data Analysis Methods	ASEN5307-001	Fall 2020	3		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					
Space Habitat Design	ASEN5158-001	Fall 2020	3		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					
Analytical Astrodynamics	ASEN5052-001	Fall 2020	3		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					

The default selection for 5000-level classes is Master's Only.

Aerospace Environment	ASEN5335-001	Spring 2020	3	A	Remove
Apply to <input type="radio"/> Bachelor's Only <input checked="" type="radio"/> Master's Only <input type="radio"/> Both					
Leading Oneself	EMEN5050-002	Fall 2018	3	A	Remove
Apply to <input type="radio"/> Bachelor's Only <input checked="" type="radio"/> Master's Only <input type="radio"/> Both					
Fundamentals of Project Mgmt	EMEN5030-300	Summer 2014	3	A	Remove
Apply to <input type="radio"/> Bachelor's Only <input checked="" type="radio"/> Master's Only <input type="radio"/> Both					
Finance for Engr Mngrs	EMEN5020-001	Spring 2020	3	A	Remove
Apply to <input type="radio"/> Bachelor's Only <input type="radio"/> Master's Only <input checked="" type="radio"/> Both					

When the student changes a selection, the totals also change.

Class Selection		
BAM students may take up to and including 12 hours of coursework (as an undergraduate), which can later be applied to the accelerated master's degree. A certain number of credits can double count for both the undergraduate and the graduate portions of a BAM. This number is program specific, and the "Double Counted Credits Allowed" box below displays those credit amounts.		
Double Counted Credits Allowed 6	Master's Credits Allowed 12	Classes shown: 4000 and 5000+ level
Double Counted Credits Selected 3.00	Master's Credits Selected 12.00	Show More Classes
If your program allows 4000-level courses to double count toward the bachelor's and master's degrees, click the "show more classes" button above to include 4000-level courses.		

When the student clicks the Show More Classes button, the class list is refreshed with the next level of classes. Selections made in the previous list are retained.

Course Title	CourseID	Semester	Credit Hours	Grade	
Special Topics	ASEN4519-801	Summer 2019	3	A	Remove
Apply to <input checked="" type="radio"/> Bachelor's Only <input type="radio"/> Master's Only <input type="radio"/> Both					
Aircraft Design	ASEN4138-010	Fall 2019	3	A-	Remove
Apply to <input checked="" type="radio"/> Bachelor's Only <input type="radio"/> Master's Only <input type="radio"/> Both					
Aircraft Design	ASEN4138-012	Fall 2019	0		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					
Human Factors Engineering	ASEN4128-001	Spring 2020	3	A	Remove
Apply to <input checked="" type="radio"/> Bachelor's Only <input type="radio"/> Master's Only <input type="radio"/> Both					
Senior Proj 2: Des Practicum	ASEN4028-010	Spring 2020	4	A	Remove
Apply to <input checked="" type="radio"/> Bachelor's Only <input type="radio"/> Master's Only <input type="radio"/> Both					
Senior Proj 2: Des Practicum	ASEN4028-207	Spring 2020	0		Remove
This class was taken while at graduate status and cannot be applied to the undergraduate degree.					

The default selection for 4000-level and 3000-level classes is Bachelor's only.

When the student has exceeded one or both of the maximums, a message is displayed and the related maximum is highlighted. The student will not be able to submit the form until it is corrected.

Class Selection

BAM students may take up to and including 12 hours of coursework (as an undergraduate), which can later be applied to the accelerated master's degree. A certain number of credits can double count for both the undergraduate and the graduate portions of a BAM. This number is program specific, and the "Double Counted Credits Allowed" box below displays those credit amounts.

Double Counted Credits Allowed 6	Master's Credits Allowed 12	Classes shown: 4000 and 5000+ level
Double Counted Credits Selected 11.00	Master's Credits Selected 20.00	Show More Classes

If your program allows 4000-level courses to double count toward the bachelor's and master's degrees, click the "show more classes" button above to include 4000-level courses.

You have selected more than the maximum allowed credits to apply to your master's degree. Please adjust your class selections.

You have selected more than the maximum allowed double-counted credits for your program. Please adjust your class selections.

OnBase Resources

OnBase is managed by the Enterprise Content Services (ECS) team in UIS. ECS maintains an area on their website that is dedicated to CU OnBase users and administrators. You will find many useful links on this site that will help you learn more about OnBase.

[Enterprise Content Services – OnBase](#)

[OnBase New Customer Information](#)

[OnBase Training](#)

[Learning Opportunities](#)