

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



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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></ul> <p>3. Navigate to Workflow ( → Workflow → Open Workflow).</p> <p>4. Navigate to the “B - REG – BAM Intent Departmental Approval” life cycle. <i>See the “</i></p> <p>5. <i>OnBase Web Client” section for navigation details.</i></p> <p>6. Open the “B - REG - BAM Approval - Inbox” queue.</p>
	<p>7. Attach additional supporting documents and letters of recommendation, if available.</p>
	<p>8. Generate a packet to help with the review process.</p>
	<p>9. For each application, review the submission and make a determination by clicking the Approve or Deny button.</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 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 the request is denied, the form status is updated to DENIED and the form is removed from the removed from the workflow immediately.</p> <p>The student will receive an email notification stating that their request has been denied. Any comments saved in the application by the department admin will be included in the email notification.</p> <p>Although the form is removed from the workflow, it will remain in OnBase and can be retrieved using the OnBase Document search function.</p>
	<p>When the request is approved, the department approval status is updated in the form and the form is removed from the departmental approval workflow immediately.</p> <p>The form is then sent for ISSS approval (if applicable).</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 status is updated to DENIED and the form is removed from the workflow immediately.</p>

	The student will receive an email notification stating that their request has been denied. Any comments saved in the application by the ISSS admin will be included in the email notification.
	After both department and ISSS approval (when applicable), the form status will be updated to APPROVED and the Graduate School will be notified that the application is ready to be processed.
	After processing, the status will be updated in the form and the form will be removed from the workflow. The form will remain in OnBase.

## Accessing OnBase

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

- **CU Resources (MyCUInfo)**

- 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**

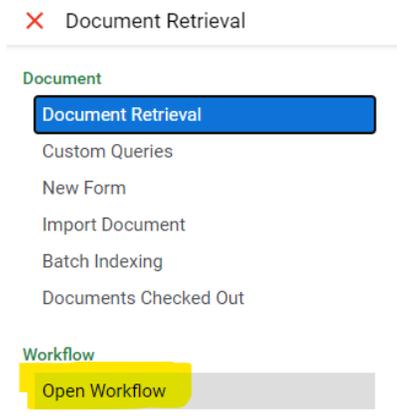
- Click a link below to access the OnBase Web Client through your browser:
  - <https://dm.prod.cu.edu> – Production site
- This will prompt you to log in with your IdentiKey and password, then open the OnBase Web Client in your browser.

Two additional options, OnBase Unity Client and Microsoft Outlook Add-in, require software installed on your computer 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.

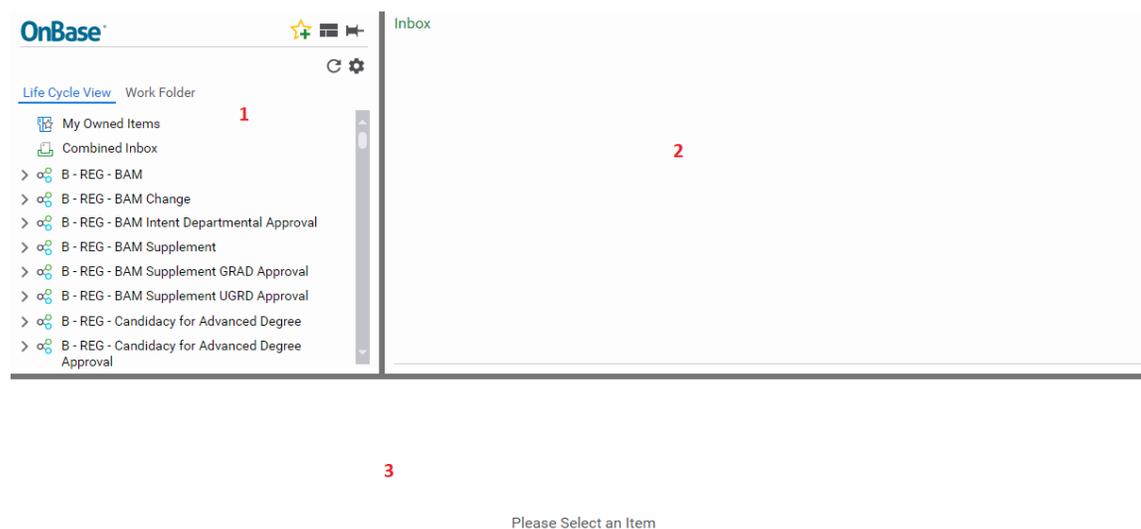
## OnBase Web Client

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

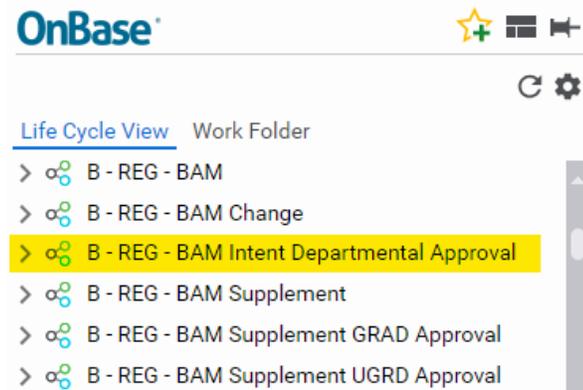
1. Select the menu icon  Document Retrieval in the upper left corner of the OnBase Web Client to see the menu options.
2. Locate the “Workflow” header and select “Open Workflow.” If you don’t see the “Workflow” header, you may not have sufficient privileges in OnBase. Send an email to [reghelp@colorado.edu](mailto:reghelp@colorado.edu) 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.”

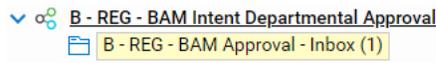


5. With “Life Cycle View” selected in the navigation pane, you should see a list of life cycles to which you have access. This list will be different for each person according to their permissions.



The B - REG - BAM life cycle is the main workflow life cycle for BAM submissions. Department admins will work in the **B – REG- BAM Intent Departmental Approval** life cycle.

6. Click the arrowhead next to the life cycle to show the inbox queue in the approval life cycle. The number next to the queue indicates the number of forms in that queue that are waiting for your approval.

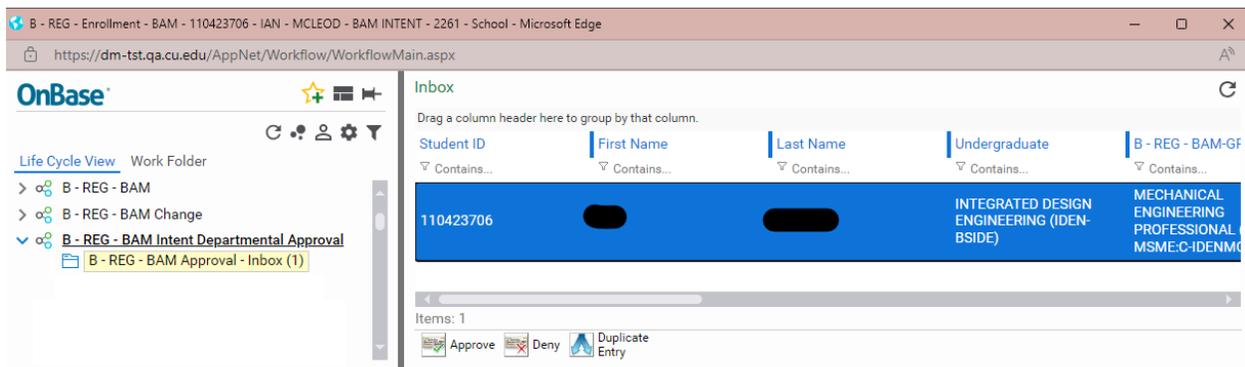


## Department Admin

### Department Inbox Queue

The inbox queue contains all form submissions that have not been approved or denied.

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.

The screenshot displays the OnBase interface. On the left is a navigation pane with a tree view under 'Life Cycle View' and 'Work Folder'. The main area shows an 'Inbox' with a table of submissions. Below the table are 'Approve', 'Deny', and 'Duplicate Entry' buttons. The detailed view below shows the title 'Intent Application to the Bachelor's – Accelerated Master's Degree Program' and the 'Office of the Registrar, UNIVERSITY OF COLORADO BOULDER'. A 'Student Information' section contains fields for Student ID, First Name, Last Name, and Colorado.edu Email.

Student ID	First Name	Last Name	Undergraduate	Graduate	Subplan
110423706			INTEGRATED DESIGN ENGINEERING (IDEN-BSIDE)	MECHANICAL ENGINEERING PROFESSIONAL (MCEN-MSME-C-IDENMCEP)	WORKFLOW WORKFLOW

Items: 1

Approve Deny Duplicate Entry

### Intent Application to the Bachelor's – Accelerated Master's Degree Program

Office of the Registrar  
UNIVERSITY OF COLORADO BOULDER

**Student Information**

Student ID *	First Name *	Last Name *	Colorado.edu Email *
110423706			colorado.edu

After review, the department admin will make 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 made, 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.

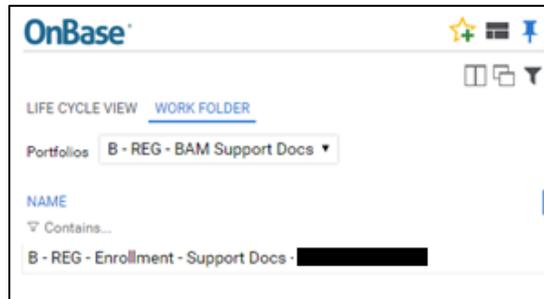
Another option is to print a document packet: a collection of documents combined into a single PDF that can be downloaded and/or printed. When generating a packet, a new window is opened, so ensure that pop-ups are enabled for the site. Packets can be printed, downloaded, saved in OnBase or discarded.



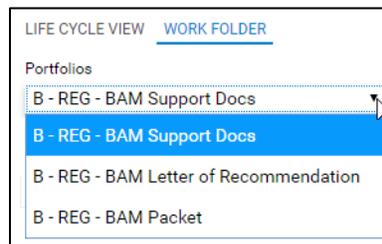
You must enable pop-ups to generate a packet. If pop-ups are not enabled, the packet will not be generated. The OnBase browser will not display any indication that a problem occurred.

## 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.

### Upload Supporting Documents Required by the Department

#### Attachments (1)

If your program requires supplemental material in order to be considered for admission, please attach here. Please contact your program of interest directly to determine what additional material may be necessary.

(Pending) [SupportDoc.txt](#) [\[Remove\]](#)

#### Letter of Recommendation (1)

Letter of Recommendation

(Pending) [LOR.txt](#) [\[Remove\]](#)

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

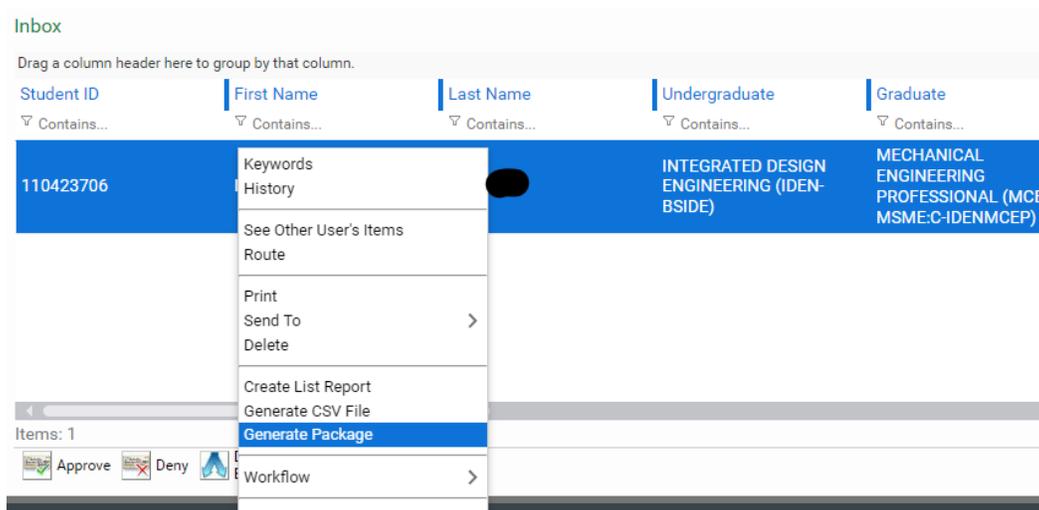
## Document Packets

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.

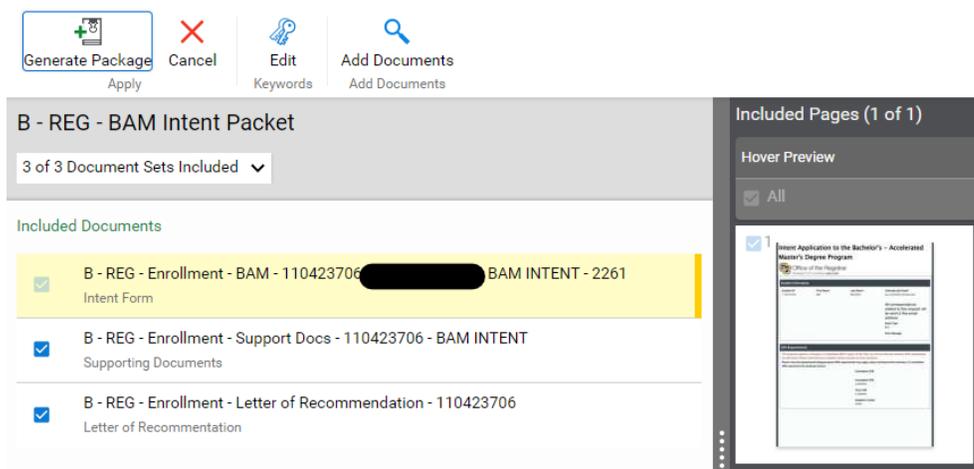
 You must enable pop-ups to generate a packet. If pop-ups are not enabled, the packet will not be generated. The OnBase browser will not display any indication that a problem occurred.

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.,

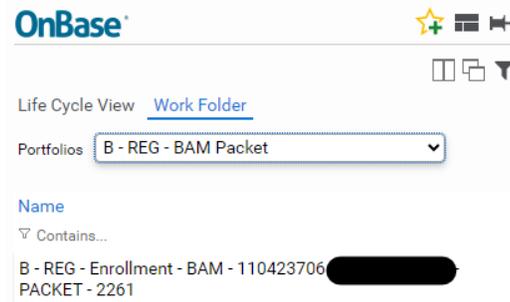
transcripts) using the “Add Documents” option in the menu.

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 (if applicable) 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> REQUESTED	<b>Department Comments (Student Visible)</b> <input type="text"/>
<b>Approver</b> <input type="text"/>	
<b>ISSS Approval Status</b> NOT SET	<b>ISSS Comments (Student Visible)</b> <input type="text"/>
<b>Approver</b> <input type="text"/>	
<b>Processing Status*</b> UNDER REVIEW	
<input type="button" value="Save Comments"/>	

## 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](#)