

2020

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







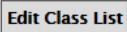


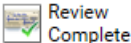
Office of the Registrar
UNIVERSITY OF COLORADO **BOULDER**

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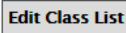



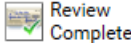
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Quick Reference for Undergraduate Advisors

	<p>1. The undergraduate advisor will receive an email notification indicating that a student has submitted the BAM supplement form.</p>
	<p>2. Open OnBase:</p> <ul style="list-style-type: none"> • https://dm.prod.cu.edu – Production site <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] Supplement UGRD queue.</p>
	<p>6. Select a submission to review from the inbox pane.</p>
	<p>7. Review the class list for how the classes are applied to the degrees. If changes are required:</p> <ol style="list-style-type: none"> a. Click the “Edit Class List” button. This will make the “Applies To” control editable. b. Make changes as necessary.
	<p>8. In the “Undergraduate Advisor” section, below the class list, indicate whether the student is on track to graduate with their bachelor’s degree. If the answer is no, explain.</p> <p>9. Enter any additional comments. These comments will be included in the email sent to the advisor for the master’s degree.</p>
	<p>10. Don’t forget to click “Submit” to save your changes.</p>
	<p>11. After you’ve submitted your changes, comments and certification selection, click the “Review Complete” button located at the bottom of the inbox pane to move the form along in the workflow process.</p>











Quick Reference for Master’s Program Advisors

All submissions will be reviewed and certified by the undergraduate program advisor before being sent to the master’s program advisor for review.

	<p>1. The master’s program advisor will receive an email notification indicating that a student has submitted the BAM supplement form, after the form has been certified by the undergraduate advisor.</p>
	<p>2. Open OnBase:</p> <ul style="list-style-type: none"> • https://dm.prod.cu.edu – Production site <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] Supplement GRAD queue.</p>
<p>Inbox</p>	<p>6. Select a submission to review from the inbox pane.</p>
	<p>7. Review the class list for how the classes are applied to the degrees. If changes are required:</p> <ol style="list-style-type: none"> a. Click the “Edit Class List” button. This will make the “Applies To” control editable. <p> <i>Once you click the “Edit Class List” button, the form will be marked for return to the undergraduate advisor.</i></p> <ol style="list-style-type: none"> b. Make changes as necessary.
	<p>8. In the “Master’s Program Advisor” section, below the class list and undergraduate advisor section, select whether to certify the form.</p> <p>9. Enter any additional comments.</p>
	<p>10. Don’t forget to click “Submit” to save your changes.</p> <p>11. If certified, the form will be processed with the current selections.</p>
	<p>12. After you’ve submitted your changes, comments and certification selection, click the “Review Complete” button located at the bottom of the inbox pane to move the form along in the workflow process.</p>

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 advisor can edit the class list, changing how each class is applied toward their degrees.
	<p>There are three options for the advisor. The advisor can choose to:</p> <ol style="list-style-type: none"> 1. Certify that the student is on-track to complete their undergraduate degree this semester. 2. Explain the additional requirements that must be fulfilled within the semester. 3. Deny the request. Denied requests are removed from the department life cycle. 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.
	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>There are three options for the advisor. The advisor can choose to:</p> <ol style="list-style-type: none"> 1. Certify the coursework. 2. Edit the course list and return the form to the undergraduate advisor for re-certification. 3. Deny the request. Denied requests are removed from the department life cycle. 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>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>
	After processing, the status will be updated in the form, the form will be removed from the workflow, and the form will be added to the student's OnBase record to be used upon certification of the master's degree.

Background

BAM programs allow students to take up to and including 12 credits while at undergraduate 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**
 - Click a link below to access the OnBase Web Client through your browser:
 - <https://dm.prod.cu.edu> – Production site
 - <https://dm-tst.qa.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.



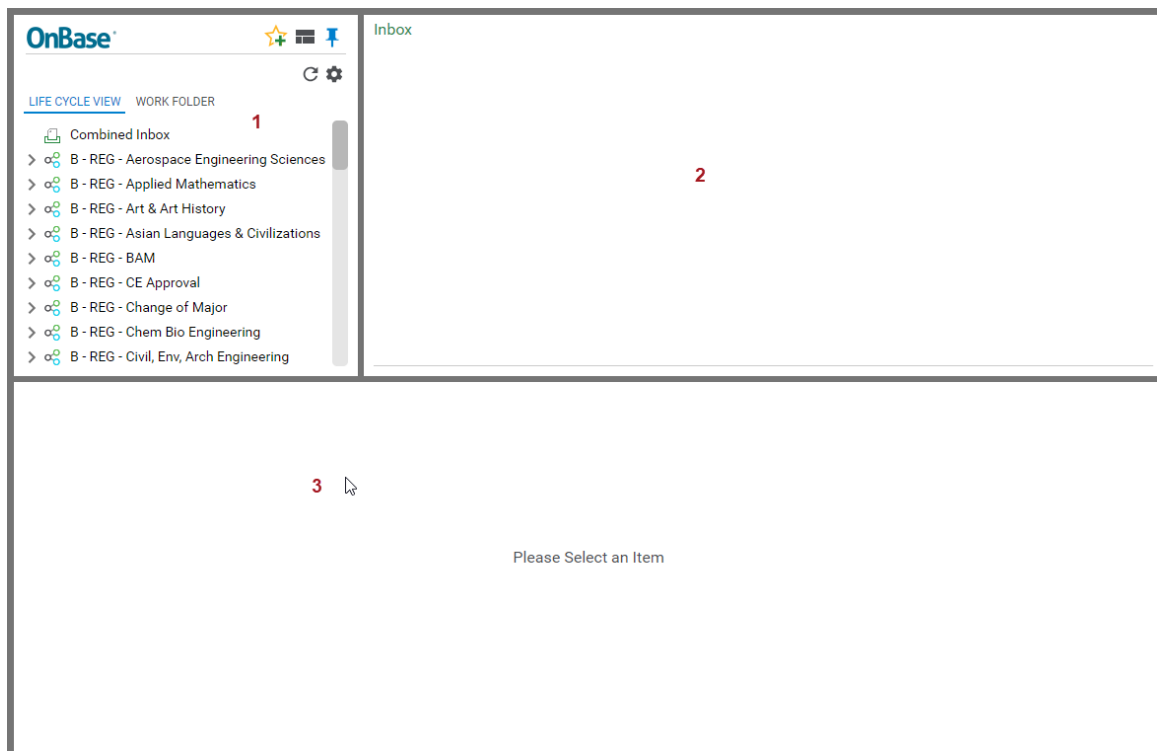
Browser Restriction: OnBase does not support workflow in the Microsoft Edge browser. If you do not see Workflow as an option in the OnBase Web Client menu, make sure you are not using the Microsoft Edge browser. Email reghelp@colorado.edu if this does not resolve the problem.

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 oithelp@colorado.edu or reghelp@colorado.edu to request the install.

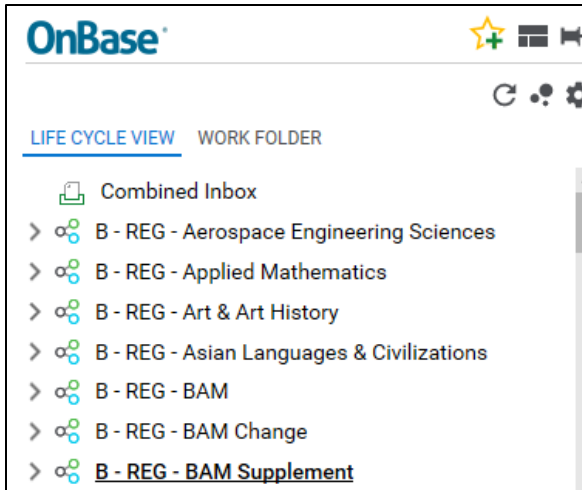
OnBase Web Client

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 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.”



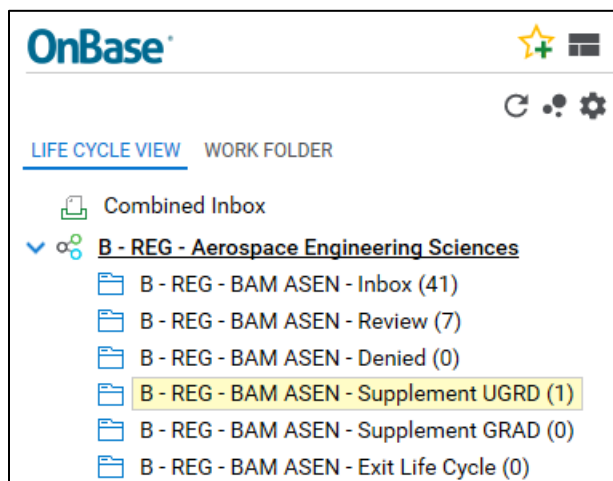
5. With “Life Cycle View” selected in the navigation pane, you should see a list of life cycles to which you have access. This list will be different for each person according to their permissions.



The B - REG - BAM 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.

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.



The department life cycles are used for both the BAM intent and BAM supplement forms. The “Inbox”, “Review” and “Denied” queues (folders) are used for the BAM intent form. The “Supplement UGRD” and “Supplement GRAD” queues are used for the BAM supplement form.

Advisor

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.

Department Supplement Queue

The department's "Supplement UGRD" queue contains all form submissions requiring review and certification. New submissions and previously certified submissions sent back for recertification from the master's advisor are in this folder.

The department's "Supplement GRAD" queue contains all form submissions that have been certified by the undergraduate advisor and are awaiting master's program advisor certification.

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 form to select and open the form in the lower pane. Most of the form is read-only.

The screenshot displays the OnBase interface. The top left shows the 'OnBase' logo and navigation icons. Below it is a 'LIFE CYCLE VIEW' and 'WORK FOLDER' section with a tree view of folders. The selected folder is 'B - REG - Aerospace Engineering Sciences', which contains several sub-folders, including 'B - REG - BAM ASEN - Supplement UGRD (1)'. The main area shows an 'Inbox' table with columns: LAST NAME, FIRST NAME (PREFERRED), STUDENT ID, PROGRAM, PLAN, and SUBPLAN. The table contains one row with a blue header and a black row below it. Below the table is a 'Review' button and a 'Complete' button. The bottom section of the interface is titled 'Graduate School University of Colorado Boulder Bachelor's-Accelerated Master's (BAM) Program Supplement Form'. It includes instructions: '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.' Below this is a 'Student Info' section with input fields for 'Student ID', 'First Name (preferred)', and 'Last Name'.

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

Editing the Class List

Review the class list selections submitted by the student. You can edit the class list selections by clicking the "Edit Class List" button located below the class list. The "Apply to" control 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.

Changes made to the class list by the undergraduate advisor 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.

Changes made to the class list by the master's program advisor will be sent back to the undergraduate advisor for recertification. Again, please reach out to discuss with the student.

Certification

After reviewing the form and editing the class selections (if necessary), make your selection in the "Approvals" section. Depending on the certification option chosen, comments may be required. Enter your comments and save the changes using the "Submit" button in the form.

Comments

If you have made comments and returned the form to another user, the comments will not be removed when it is sent back for your subsequent review. For clarity, consider either removing the comments when the specific issue has been resolved, or add additional comments to clarify how the issue was resolved.

Review Complete

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



You can select multiple forms in the inbox and click the "Review Complete" button to send them all forward in the workflow with a single click.

BAM Supplement Form

Students will access the form via a link on the [Pursue BAM or Concurrent Degrees](#) webpage. 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 a message indicating the student isn't 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	First Name (preferred)	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address		
<input type="text" value="@Colorado.EDU"/>		
Undergraduate Plan	BAM Program *	
<input type="text"/>	<input type="text"/>	

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

If the student is a BAM program participant, their program information will be displayed.

Student Info

Student ID	First Name (preferred)	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email Address		
<input type="text" value="@Colorado.EDU"/>		
Undergraduate Plan	BAM Program *	
<input type="text" value="Aerospace Engineering Sciences"/>	<input type="text" value="C-ASENP"/>	

The “Class Selection” section shows the maximum number of allowed double-counted and master’s credits for the student’s program. A counter also shows how many of each the student selected in the “Class List” section below.

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

Master's Credits Allowed

Classes shown: 5000+ level

Double Counted Credits Selected

Master's Credits Selected

[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.

The form displays the student’s classes in batches, starting with those at the 5000 level and above. If the student clicks the “Show More Classes” button, the list expands to include 4000-level classes. Another click adds the 3000-level classes.

If the student has not taken any 5000-level classes, the form will automatically start by showing their 4000-level classes. The form will never show classes below the 3000 level.

The student must indicate whether they’re applying each displayed class to their bachelor’s degree only, their master’s degree only, or both. The default selection for 5000-level classes is “Master’s Only”.

Course Title	CourseID	Semester	Credit Hours	Grade	
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					

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Classes taken while at graduate status will not be calculated in the totals; a corresponding message appears below each such class.

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.					

When the student changes a selection, the totals in the “Class Selection” section update accordingly.

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 <input type="text" value="6"/>	Master's Credits Allowed <input type="text" value="12"/>	Classes shown: 4000 and 5000+ level
Double Counted Credits Selected 3.00	Master's Credits Selected 12.00	<input type="button" value="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>		

If the student clicks “Show More Classes”, the “Classes shown” indicator updates accordingly (see above) and the next level of classes is appended to the class list. The default selection for 4000-level and 3000-level classes is “Bachelor’s Only”.

Course Title	CourseID	Semester	Credit Hours	Grade	
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.					

If the student's selections exceed one or both maximums, a message is displayed and the related allowed credits field highlighted. The student can't submit the form until they correct the error.

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	<input type="button" value="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 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](#)