OnBase Curriculum Workflow User Guide

This user guide provides instructions for submitting and approving graduate curriculum proposals.

This guide also provides helpful tips and resources for curriculum proposal requirements.

Please contact Joanne Ramirez (joaramirez@csufresno.edu) for any questions regarding curriculum process.
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How to Login to OnBase

1. Sign in to the My Fresno State Portal using your Fresno State username and password, click the login button.

2. At the top blue bar select Campus Systems from the My Homepage dropdown menu.

3. Select the OnBase icon.

4. Under Group Layouts, Fresno State should be selected to view your OnBase Portal. This portal allows access to the Curriculum Workflow System.
How to Submit a Course Proposal

1. Under **Available Forms** double-click **UNI-Graduate Curriculum Proposal (GCP) – UFW**

   ![Image of Available Forms]

2. A new form will popup. Select **Course Proposal**.

   ![Image of Course Proposal]

3. A **Request Type** dropdown menu will appear. Select the Course Request Type. Complete the next steps based on the **Request Type** selected:
   - **New Course** (page a)
   - **Course Revision** (page b)
   - **Deactivation** (page c)
   - **Reactivation** (page d)
   - **T-Course Conversion** (page e)
New Course Proposal Process

1. Select the appropriate College/School and Academic Organization and request Effective Term and Year.
2. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.
3. Complete the Course Proposal section.

Cross-listed courses will share the same course ID and Title.

Course designation requests will first be reviewed by their respective committees.
4. **Upload** all required **documents**.

   **Please upload the following documents:**

   **Memo of Support** *
   
   Memo of Support
   Attach
   A memo is required only if the proposal affects another department.

   **Justification** *
   
   Justification (attach document) (required)
   Attach
   Use the Justification Form found on the Academic Affairs website under Curriculum / Graduate Program & Course Development.

   **New Syllabus** *
   
   New Syllabus (attach document) (required)
   Attach
   Syllabus assistance and template can be found on the Academic Affairs website under Curriculum / Graduate Program & Course Development / Course Development.

5. **Submit** the proposal or **Save** for later.

   To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

   To save a proposal for a later time, click the **Save** button. It will automatically save and close.

6. An **email confirmation** with a **Process ID** will be received after the proposal has been submitted.

   **Example:**

   Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted

   donotreply@mail.fresnostate.edu
to charity.wadell, me, pawns


   **This email is from the Test environment**

   Your curriculum proposal for Process ID: 5802880 - LEE 281 has been successfully submitted. You can check the status of your proposal in the [OnBase OnBase Web Client](https://onbase.fresnostate.edu). For additional instructions please follow the steps within the [user guide](https://example.com/user-guide).

   For any questions regarding this process, please contact [Joanne Ramirez](mailto:joanne.ramirez@fresnostate.edu) at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
Course Revision Proposal Process

1. Enter Course Catalog ID. Selection will narrow as you enter the text. Once selected, existing course information will autofill on the form.

2. Select the requested Effective Term and Year.

3. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.
4. Complete the **Proposed Course Information** section for area(s) requesting to be updated.

5. **Upload** all required **documents**.

---

**Memo of Support**

A memo is required only if the proposal affects another department.

**Catalog Requirement with Copy Edits**

1. The Catalog Requirements page needs to be copied and pasted into a Word document, and add markups (strikethrough what is old, and insert the changes in red text).
2. Followed by a new clean version of the catalog.

**Justification**

Use the Justification Form found on the Academic Affairs website under Curriculum / Graduate Program & Course Development.

**New Syllabus**

Syllabus assistance and template can be found on the Academic Affairs website under Curriculum / Graduate Program & Course Development.
6. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

![Actions table]

To save a proposal for a later time, click the **Save** button. It will automatically save and close.

![Actions table]

7. **An email confirmation** with a **Process ID** will be received after the proposal has been submitted.

**Example:**

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For any questions regarding this process, please contact Joanne Ramirez at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
Course Deactivation Proposal Process

1. Enter Course Catalog ID. Selection will narrow as you enter the text. Once selected, all existing course information will autofill on the form.

2. Select the requested Effective Term and Year.

3. Indicate if the proposal affects other departments on campus. If yes, a memo of support will be required.
4. **Upload** all required **documents**.

![Memo of Support and Justification forms](image)

A memo is required only if the proposal affects another department.

Justification (attach document) (required)

Use the Justification Form found on the Academic Affairs website under Curriculum / Graduate Program & Course Development.

5. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

![Actions table](image)

To save a proposal for a later time, click the **Save** button. It will automatically save and close.

6. An **email confirmation** with a **Process ID** will be received after the proposal has been submitted.

*Example:*

Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted

**donotreply@mail.fresnostate.edu**

to charity.waddell, me, pawns

**FRESNO STATE**


**This email is from the Test environment**

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Course Reactivation Proposal Process

1. Enter Last Semester Offered – term and year.

2. Select the appropriate College/School and Academic Organization and requested Effective Term and Year.

3. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.

4. Complete the Course Proposal section with the course information requesting to be reactivated.
5. **Upload** all required documents.

![Image of document upload section]

6. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

![Image of ready to submit button]

To save a proposal for a later time, click the **Save** button. It will automatically save and close.

![Image of save button]
7. An **email confirmation** with a **Process ID** will be received after the proposal has been submitted.

*Example:*

Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted

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Your curriculum proposal for Process ID: 5802880 - LEE 281 has been successfully submitted. You can check the status of your proposal in the [OnBase Web Client](#).

For additional instructions please follow the steps within the [user guide](#).

For any questions regarding this process, please contact Joanne Ramirez at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
T-Course Conversion Proposal Process

1. Select the appropriate College/School and Academic Organization and requested Effective Term and Year.

2. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.

3. Enter the Existing T-Course Information to be converted.

4. Complete the Course Proposal section, enter the course information the T-Course will be converted to.
5. **Upload** all required documents.

6. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

To save a proposal for a later time, click the **Save** button. It will automatically save and close.
7. An email confirmation with a Process ID will be received after the proposal has been submitted.

Example:

Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted

donotreply@mail.fresnostate.edu

to charity.waddell, mve, pawns

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Your curriculum proposal for Process ID: 5802880 - LEE 281 has been successfully submitted. You can check the status of your proposal in the OnBase OnBase Web Client.

For additional instructions please follow the steps within the user guide.

For any questions regarding this process, please contact Joanne Ramirez at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
How to Submit a Catalog Change Proposal (not associated with a course proposal)

1. Under Available Forms double-click UNI-Graduate Curriculum Proposal (GCP) – UFW

2. Select Catalog Change (not associated with a course proposal). Select the appropriate College/School and Academic Organization and requested Effective Term and Year.

3. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.

4. Complete the Catalog Proposal section. A dropdown menu will appear to select the Type of Program.

5. Upload all required documents.

Examples of required documentation:

- Memo of Support
  - A memo is required only if the proposal affects another department.

- Catalog Requirement with Copy Edits
  - (1) The Catalog Requirements page needs to be copied and pasted into a Word document, and add markups (strike through what is old, and insert the changes in red text).
  - (2) Followed by a new clean version of the catalog.
  - Required for all EXISTING program proposals.

- Justification
  - Required for all EXISTING program proposals.
8. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

![Actions]

To save a proposal for a later time, click the **Save** button. It will automatically save and close.

![Actions]

9. **An email confirmation** with a **Process ID** will be received after the proposal has been submitted.

**Example:**

Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted


**This email is from the Test environment**

Your curriculum proposal for Process ID: 5802880 - LEE 281 has been successfully submitted. You can check the status of your proposal in the [OnBase OnBase](#) Web Client.

For additional instructions please follow the steps within the [user guide](#).

For any questions regarding this process, please contact [Joanne Ramirez](#) at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
How to Submit a Program Proposal

6. Under **Available Forms** double-click **UNI-Graduate Curriculum Proposal (GCP) – UFW**

7. Select **Program Proposal**. Select the appropriate **College/School** and **Academic Organization** and requested **Effective Term** and **Year**.

8. Indicate if this proposal **affects other departments on campus**. If yes, a memo of support will be required.

9. Complete the **Program Proposal** section, select the **Type of Proposal**.
10. A dropdown menu will appear to select the **Type of Program**.

<table>
<thead>
<tr>
<th>Type of Program</th>
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<tbody>
<tr>
<td>Master's (or Ed.S.)</td>
</tr>
<tr>
<td>Doctorate</td>
</tr>
<tr>
<td>Advanced Certificate</td>
</tr>
</tbody>
</table>

11. Based on the **type of proposal** and **program**, the required information on the form will vary:

- **New Program** – Enter the new **Program Name**. If it is a new degree, it will need to be on the Academic Master Plan before it can be submitted.

- **Revision** – The **active Program Code** will need to be entered.

- **Reactivate** – The **inactive Program Name** and **Program Code** will need to be entered.

- **Suspend** – The **active Program Code** will need to be entered.
12. **Upload** all required documents.

*Examples of required documentation:*

<table>
<thead>
<tr>
<th>Please upload the following documents:</th>
</tr>
</thead>
<tbody>
<tr>
<td>**Memo of Support * **</td>
</tr>
<tr>
<td>Memo of Support</td>
</tr>
<tr>
<td>**Program Proposal * **</td>
</tr>
<tr>
<td>Program Proposal</td>
</tr>
<tr>
<td>**Substantive Change Program Screening Form (WASC) * **</td>
</tr>
<tr>
<td>Substantive Change Program Screening Form (WASC)</td>
</tr>
<tr>
<td>**Catalog Requirement with Copy Edits * **</td>
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<td>(1) The Catalog Requirements page needs to be copied and pasted into a Word document, and add markups ( strikethrough what is old, and insert the changes in red text).</td>
</tr>
<tr>
<td>(2) Followed by a new clean version of the catalog.</td>
</tr>
<tr>
<td>Catalog Requirement with Copy Edits (attach document) (required)</td>
</tr>
<tr>
<td>**Justification * **</td>
</tr>
<tr>
<td>Justification (attach document) (required)</td>
</tr>
</tbody>
</table>

10. **Submit** the proposal or **Save** for later.

To **Submit** the proposal, check **Ready to Submit** and click **Submit**.

To save a proposal for a later time, click the **Save** button. It will automatically save and close.
11. An email confirmation with a Process ID will be received after the proposal has been submitted.

Example:

Test: GCP: Process ID 5802880 – LEE 281 Successfully Submitted

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Your curriculum proposal for Process ID: 5802880 - LEE 281 has been successfully submitted. You can check the status of your proposal in the OnBase OnBase Web Client.

For additional instructions please follow the steps within the user guide.

For any questions regarding this process, please contact Joanne Ramirez at the Division of Research and Graduate Studies or call the office at (559) 278-2448.
How to Review / Approve / Return a Proposal in the Queue

1. The link in the email notification will go directly to the Fresno State OnBase site where My Workflow menu is located. Note – when you click on the link, you may be required to login first.

2. Under Group Layouts—Fresno State should be selected. Under My Workflow find the proposal needing review, and double-click on it.
3. After you double-click the proposal, a separate window will pop-up for the **Form Workflow**

4. Towards the bottom of the form, click on the attachment name to view and/or download.

5. To take **Action** on the proposal scroll to the bottom of the form. If there are no issues, check **Approve** and click **Submit**. The proposal will move on to the next step of the approval process. If there is additional work needed, check **Return for Edits** and click **Submit**.
How to Search for a Saved Proposal or Check Status of a Proposal

1. The link in an email notification will go directly to the Fresno State OnBase site where the My Workflow menu is located. Note – when you click on the link, you may be required to login first.

2. Under Group Layouts – Fresno State should be selected. In the search box fill in any search criteria and click on the Search button.
**Tips for the Search Engine:**

- Date ranges can be used.
- Process ID – full number must be used.
- Status – complete name of queues.
- Workflow Status – In process or archived.
- Submitted By – Fresno State username
- Use the Key icon to reset the search criteria.

**Search Ability**

- A submitter can search for a proposal at any step in the process.
- A reviewer can search for a proposal only when it is in their *My Workflow*.

3. After you click on the **Search button**, the search results will appear in the **Results tab**.
4. To view the **Workflow History**, double-click on the proposal in **Search Results** list.

![Workflow History](image)

A separate window will pop-up for the **Form**. Use the scroll bar on the far right to scroll down and view the **Workflow History**.

5. For **additional information**, click on the **Approvals tab** on the form. Here, each **approval step** can be seen including any **comments** added.

![Approvals Tab](image)