OnBase Curriculum Workflow User Guide

This user guide provides instructions for submitting and approving undergraduate curriculum proposals. This guide also provides helpful tips and resources for curriculum proposal requirements.

Please contact Jayne Ramirez (jayramirez@csufresno.edu) for any questions regarding curriculum processes.

Updated 06/11/2021
Created 09/03/2020
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How to Login to OnBase

1. Sign in to the My Fresno State Portal (https://ps.fresnostate.edu) using your Fresno State username and password, click the login button.

![Campus Login Services](image)

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

![Campus Systems](image)

3. Select the OnBase icon.

![OnBase](image)

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-Undergraduate Curriculum Proposal (UPC) - UFW**

2. A New Form will popup. Select **Course Proposal**.

3. A **Request Type** dropdown menu will appear. Select the Course Request Type.

   Complete the next steps based the **Request Type** Selected:
   - **New Course** (page 5)
   - **Course Revision** (page 7)
   - **Deactivation** (page 9)
   - **Reactivation** (page 11)
   - **T-Course Conversion** (page 13)
New Course Proposal Process

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

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

3. Complete the Course Proposal section.

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

Course designation requests will be forwarded after review by the University Undergrad Committee
4. **Upload** all required documents

<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><strong>A memo is required only if the proposal affects another department.</strong></td>
</tr>
<tr>
<td>**Justification ***</td>
</tr>
<tr>
<td>Justification</td>
</tr>
<tr>
<td><strong>Use the Justification Form found on the Undergraduate Studies Website under Curriculum / Undergraduate Program and Course Development.</strong></td>
</tr>
<tr>
<td>**New Syllabus ***</td>
</tr>
<tr>
<td>New Syllabus</td>
</tr>
<tr>
<td><strong>Syllabus assistance and template can be found on the Undergraduate Studies Website under Curriculum / Course Instruction. References to ensure syllabus is compliant: APM 232 and APM 241</strong></td>
</tr>
</tbody>
</table>

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

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

**Actions**

- ✓ Ready to Submit
- Submit

*To save a proposal for a later time, hit the Save button. It automatically save and close. Go to page 21 for instructions on how to retrieve the proposal.*

**Actions**

- Ready to Submit
- Save

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

*Example:*

UCP: Process ID 5715913 – AGRI 100H Successfully Submitted

Forms@csufresno.edu

to jayneramirez* ✓

Thu, Jul 23, 11:26 AM (6 days ago) ⭐ ↩️


Your curriculum proposal for Process ID: 5715913 - AGRI 100H has been successfully submitted. You can check the status of your proposal in the OnBase Web Client.

For any questions regarding this process, please contact Jayne Ramirez (jayneramirez@email.fresnostate.edu) at the Office of the Dean of Undergraduate Studies or call the office at (559) 278-4466.
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. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.

3. Select the requested Effective Term and Year.

   Course Proposal
   
   I would like to submit as:
   - Program Proposal
   - Course Proposal

   Request Type | Course Catalog ID
   | ENGL 10 (018435)

   Does this request affect other departments on Campus?
   - Yes
   - No

   Process ID | Create Date
   | 07/30/2020

   College / School Name | Academic Organization
   | ARTS AND HUMANITIES (48) | ENGLISH (264)

   Effective Term | Year
   | |

   Course Proposal
   
   Existing Course Information

   Subject | Catalog Number | Units Min | Units Max
   | ENGL 10 | 3 | 3

   Course Short Title | Course Long Title
   | ADD ACADEMIC LITERACY | ACCELERATED ACADEMIC LITERACY

   Course Classification CS#1 | Course CS#2 (Lab/Activity)
   | | |

   Proposed Course Information

   Is Course Cross-Listed?
   - Yes
   - No

   Catalog Description
   Limit course description to 600 characters, using succinct phrases rather than narrative sentences. Include prerequisites, limitation, lecture/lab hours. For conversion courses also include the former catalog number, e.g., (formerly Biol 185T section). Indicate "Not open to..." statement if appropriate.

   Enter the Clean Catalog Copy including the above information here.

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

   Has this course description been updated?
   - Yes
   - No

   Subject | Catalog Number | Units Min | Units Max | Repeatable
   | | | | |

   Course Short Title (16 character limit) | Course Long Title (60 character limit)
   | | |

   Course Classification CS#1 | Course CS#2 (Lab/Activity)
   | | |

   Select Course Designation(s) that would apply to proposal
   - Service Learning
   - Writing Course
   - GE Course
   - MI Course
   - Online Course

   Course designation requests will be forwarded after review by the University Undergrad Committee
4. **Upload** all required documents.

**Please upload the following documents:**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Memo of Support</td>
<td>A memo is required only if the proposal affects another department.</td>
</tr>
<tr>
<td>Catalog Requirement with Copy Edits</td>
<td>Copy of the current catalog description should include strikethrough of old language and underlining of new language.</td>
</tr>
<tr>
<td>Justification</td>
<td>Use the Justification Form found on the Undergraduate Studies Website under Curriculum / Undergraduate Program and Course Development.</td>
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<tr>
<td>New Syllabus</td>
<td>Syllabus assistance and template can be found on the Undergraduate Studies Website under Curriculum / Course Instruction. References to ensure syllabus is compliant: APM 232 and APM 241</td>
</tr>
<tr>
<td>Old Syllabus</td>
<td>An old syllabus is required if there has been a unit change for the course.</td>
</tr>
</tbody>
</table>

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

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

**Actions**

- Ready to Submit
- Submit

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

*Go to page 21 for instructions on how to retrieve the proposal.*

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

*Example:*

```
UCP: Process ID 5715913 – AGRI 100H Successfully Submitted

Forms@csufresno.edu to Jayamirez

Fresno State University  Discovery. Diversity. Distinction.
```

Your curriculum proposal for Process ID: 5715913 - AGRI 100H has been successfully submitted. You can check the status of your proposal in the OnBase Web Client.

For any questions regarding this process, please contact Jayne Ramirez (jayamirez@email.fresnostate.edu) at the Office of the Dean of Undergraduate Studies or call the office at (559) 278-4466.
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. Indicate if this proposal **affects other departments on campus**. If yes, a memo of support will be required.

3. Select the requested **Effective Term and Year**.

4. **Upload** all required documents.

---

**Please upload the following documents:**

**Memo of Support**

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

**Justification**

*Use the Justification Form found on the Undergraduate Studies Website under Curriculum / Undergraduate Program and Course Development.*
5. **Submit** the proposal or **Save** for later.

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

   ![Actions]
   
   To save a proposal for a later time, hit the **Save** button. It will automatically save and close. Go to page 21 for instructions on how to retrieve the proposal.

   ![Actions]

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

   **Example:**

   UCP: Process ID 5715913 – AGRI 100H Successfully Submitted

   Forms@csufresno.edu

   to jayramirez

   Thu, Jul 23, 11:20 AM (6 days ago)

   ![Fresno State]

   Your curriculum proposal for Process ID: 5715913 - AGRI 100H has been successfully submitted. You can check the status of your proposal in the [OnBase Web Client](https://onbase.fresnostate.edu).

   For any questions regarding this process, please contact Jayne Ramirez (jayramirez@mail.fresnostate.edu) at the Office of the Dean of Undergraduate Studies or call the office at (559) 278-4468.
Course Reactivation Process

1. Enter **Last Semester Offered** — term and year

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

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

4. Complete the **Course Proposal** Section with the course information requesting to be reactivated.

5. **Upload** all required documents.

   **Please upload the following documents:**

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

   - **Catalog Requirement with Copy Edits**
     
     *Copy of the most recent catalog description should include strikethrough of old language and underlining of new language.*
6. **Submit** the proposal or **Save** for later.

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

**Actions**

- Ready to Submit
- Submit

*To save a proposal for a later time, hit the Save button. It will automatically save and close. Go to page 21 for instructions on how to retrieve the proposal.*

**Actions**

- Ready to Submit
- Save

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

**Example:**

UCP: Process ID 5715913 – AGRI 100H Successfully Submitted

Forms@csufresno.edu Thu, Jul 29, 11:20 AM (6 days ago)

to jayramirez


Your curriculum proposal for Process ID: 5715913 - AGRI 100H has been successfully submitted. You can check the status of your proposal in the Onbase Web Client.

For any questions regarding this process, please contact Jayne Ramirez (jayramirez@mail.fresnostate.edu) at the Office of the Dean of Undergraduate Studies or call the office at (559) 278-4468.
1. Indicate if this proposal affects other departments on campus. If yes, a memo of support will be required.

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

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

4. In the remaining Course Proposal section, enter the course information the T-Course will be converted to.

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

Course designation requests will be forwarded after review by the University Undergrad Committee
4. **Upload** all required documents.

### Please upload the following documents:

**Memo of Support**

- Memo of Support

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

**Catalog Requirement with Copy Edits**

- Catalog Requirement

  *Copy of the most recent catalog description should include strikethrough of old language and underlining of the new language*

**Justification**

- Justification

  *Use the Justification Form found on the Undergraduate Studies Website under Curriculum / Undergraduate Program and Course Development*

**New Syllabus**

- New Syllabus

  *Syllabus assistance and template can be found Undergraduate Studies Website under Curriculum / Course Instruction. References to ensure syllabus is compliant: APM 232 and APM 241*

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

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

**Actions**

- Ready to Submit
- Submit

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

*Go to page 21 for instructions on how to retrieve the proposal.*

**Actions**

- Ready to Submit
- Save

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

**Example:**

UCP: Process ID 5715913 – AGRI 100H Successfully Submitted

*Forms@csufresno.edu to jayramirez*

**Fresno State**

*Discovery. Diversity. Distinction.*

Your curriculum proposal for Process ID: 5715913 - AGRI 100H has been **successfully submitted**. You can check the status of your proposal in the [OnBase Web Client](#).

For any questions regarding this process, please contact Jayne Ramirez (jayramirez@mail.fresnostate.edu) at the Office of the Dean of Undergraduate Studies or call the office at (559) 278-4468.
How to Submit a Program Proposal

1. Under Available Forms select UNI-Undergraduate Curriculum Proposal (UCP) - UFW

2. A New Form will popup. Select Program Proposal and select the appropriate College/School and Academic Organization and requested Effective Term and Year.

3. Under Program Proposal, select the Type of Proposal and indicate if it affects other departments on campus. If yes, a memo of support will be required.

4. A dropdown menu will appear to select the Type of Program.
5. 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 major, it will need to be on the Academic Master Plan before it can be submitted.

![Program Proposal](image)

- **REVISIONS** — The active program code will be required. For majors and options, it will need to be indicated if there is a TMC Designation in place.

![Program Proposal](image)

- **REACTIVATE** — The inactive program name and code will need to be entered.

![Program Proposal](image)

- **SUSPEND** — The active program code will be required.

![Program Proposal](image)

6. Upload all required documents.

*Please visit the Office of the Dean of Undergraduate Studies website for details on program proposal and justification requirements.*
Examples of required documentation:

<table>
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<tr>
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<td>Memo of Support</td>
</tr>
<tr>
<td>Attach</td>
</tr>
<tr>
<td><strong>Program Proposal</strong></td>
</tr>
<tr>
<td>Program Proposal</td>
</tr>
<tr>
<td>Attach</td>
</tr>
<tr>
<td><strong>Catalog Requirement with Copy Edits</strong></td>
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<tr>
<td><strong>Justification</strong></td>
</tr>
<tr>
<td>Justification</td>
</tr>
<tr>
<td>Attach</td>
</tr>
</tbody>
</table>

- A memo is required only if the proposal affects another department.
- Required for all NEW program proposals.
- Required for all EXISTING program proposals.

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

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

   Actions
   - Ready to Submit
   - Submit

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

   Go to page 21 for instructions on how to retrieve the proposal.

   Actions
   - Ready to Submit
   - Save

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

   **Example:**

   ![Email Confirmation Example](image)
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 the My Workflow menu is located. Note—when you click on the link, you may be required to login first.

   Process ID: 2940492
   College: Agricultural Sciences And Tech (13)
   Department: Ag Sci & Tech Interdiscip (128)
   Description: ARGR 100H
   Initiator: Student1 Test1

   To view and take action on this request, log into OnBase Web Client.

   For additional instructions please follow the steps within the userguide (hyperlink).

   For any questions regarding this process, please contact Jayne Ramirez at the Office of the Dean of Undergraduate Studies or call the office at (555) 276-4468.

   *To access a proposal in OnBase through my.fresnostate.edu, follow the steps on p. 3

2. Under Group Layouts—Fresno State should be selected. Under My Workflow find the proposal needing review double-click on it.
3. A separate window will pop-up for the **Form Workflow**. The workflow layout can be adjusted by clicking on the gray lines. Once it turns yellow, it can be dragged up/down. Use the scroll bar on the far right to scroll down and view the form.

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, click **Approve** and hit **Submit**. The proposal will move on to the next step of the approval process. If there is additional work needed, click **Return for Edits** and hit **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.

*To access a proposal in OnBase through my.fresnostate.edu, follow the steps on p. 3

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 (see list to the right)
- Workflow Process = In Process or Archived
- Submitted By = Fresno State Username (example used in above screen shot)
- 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’s in their My Workflow.

Queue Names
- Saved
- Submitter Review
- Department Chair Review
- Office of the Dean
- College Curriculum Committee
- College Dean Review
- Office Dean of Undergrad
- Undergrad Committee
- Dean of Undergraduate GE Committee Review
- Writing Committee
- Service Learning Committee
- M/I Committee
- Online Committee
5. After you click on the Search Button, the search results will appear in the **Results Tab**.

6. For **Workflow History**, double-click on the proposal in **Search Results** list. 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**.
7. For Additional Information, click on the Approvals Tab on the Form. From here, each approval step can be seen including any comments added.