Cleveland State University

Office of the University Registrar



Graduate Admissions Program Coordinator/Director and Faculty User Guide



1 Accessing OnBase

Cleveland State University currently has 2 options for accessing OnBase.

- 1. Thick Client
- 2. Web Client

Thick Client

The Thick Client is installed directly on the workstation of a computer. Only users who are required to perform functions related to scanning and committing batches.

Web Client

The Web Client is what the majority of users will access to review documents and perform their specified functions in OnBase.

Logging On

To log on to the OnBase Web Client, you will need to enter the following URL:

https://onbase.csuohio.edu

You should see the following sign-on screen.

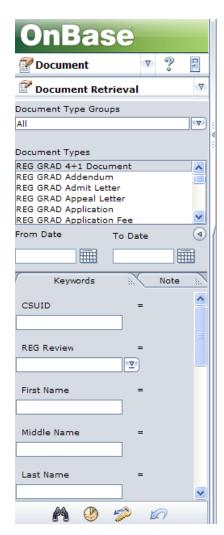


Sign on using the same credentials used for CampusNet or Campus WebMail access. Please note that if you are signing on for the first time, you will be prompted to change your password. DO NOT change your password. Send an email to the OnBase System Administrator indicating that you have received this prompt. The administrator will grant you the appropriate rights and send a confirmation that you may attempt to log in again.

2 Document Retrieval Basics

Once you have successfully logged into the system, the following Retrieval screen will be displayed for you. This screen will allow you to search by Document Type, Keywords, Dates or a combination of these options. (NOTE: Document Type searches without keywords or dates are blind searches and are only possible under certain configurations, as they may inhibit system performance for other users by putting a strain on the database.) Important to note, it that you will only see options for the documents that you have the security access to view.





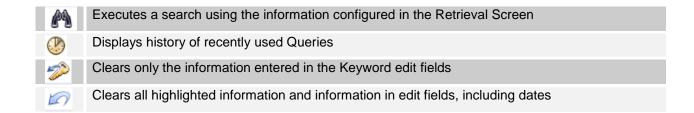
Document Type Groups – Allow user to narrow document search by Document Type Group or department (ie. REG Registrar (GRAD), REG Registrar (UGA), UGA Undergraduate Admission, etc.)

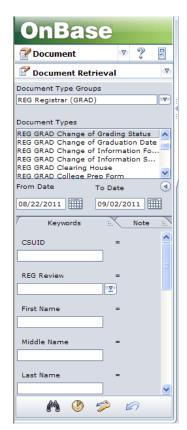
Document Types – Allow user to narrow document search by Document Type. Once a Document Type is selected, the Keywords will be available. As more Document Types are selected, the list of keyword types in the Keywords section will be limited only to those Keywords that all the selected Document Types have in common. (NOTE: To select more than one Document Type press the control button and click the various Document Types. To select all Document Types double click a Document Type and all the Document Types will be selected).

Dates – Allow user to define specific date or range of dates based on the document date of the document. The desired months can be selected from the Calendar list box and will automatically be entered in the *From* and *To* fields

Keywords – Allow user to enter specific *Keywords* to narrow document searches. The Keyword edit fields will change depending on the *Document Type* selected

Note – Opens an additional dialog box that allows you to search for a specific note type





Select a Document Type Group (for this example, REG Registrar (GRAD) has been selected). Document Retrieval by Document Type and Date Range: You will now see a list of Document Types for the selected Document Type Group.

Select the Document Type(s) to retrieve (for this example REG GRAD Change of Grading Status has been selected).

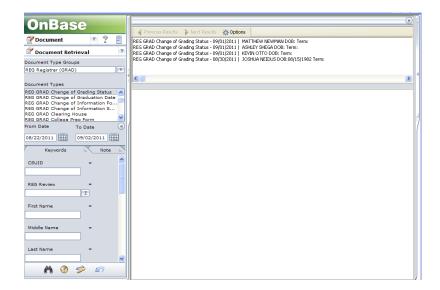
Select a date range either by typing in a date or using the Calendar list box date selection feature.



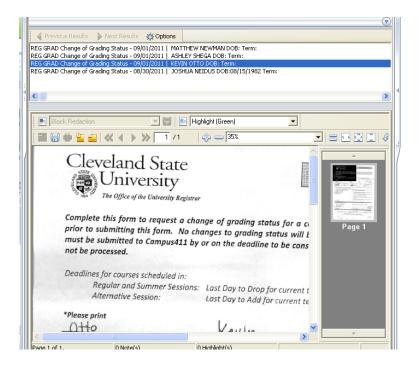
Click the Search icon

to execute the search.

The Document Search Results window will display in the upper right-hand window.



Double-click on a document in the results hit list that you wish to view. The document will be displayed below the **Document Search Results** window.



Document Retrieval by Document Keyword:



Select a Document Type Group (for this example, All Document Types are selected). You will see a list of all Document Types.

Select the Document Type(s) to retrieve (for this example all Document Types have been selected by double clicking).

Enter in a keyword. (For this example 2516624 has been entered).



Click the Search icon

to execute the search.

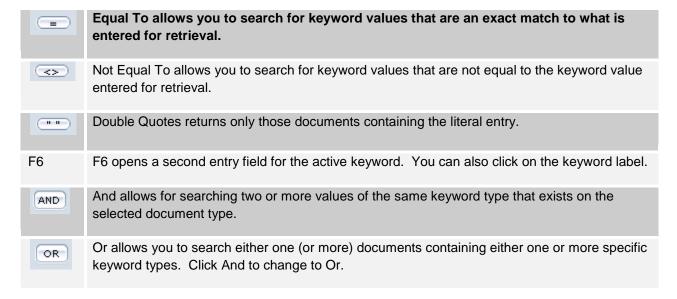
The Document Search Results window will display in the upper right-hand window.

Keyword Operators

The Keyword Type Edit Field default property = (equal to) will appear in a box on the right side of each Keyword Type Edit Field, and the default binary operator, AND will appear in a box on the right side of each Keyword Type Edit Field when multiple search fields have been activated for a Keyword in the Document Retrieval dialog box.

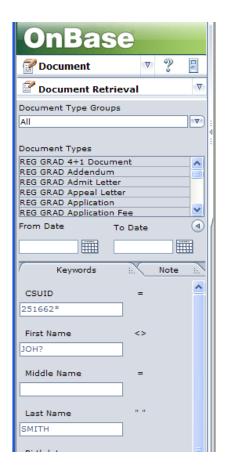


If you left-click the = operator, it will act as a toggle switch and allow you to toggle through the following choices (choices vary depending on the format of the Keyword, i.e. date, alphanumeric, currency, etc.)

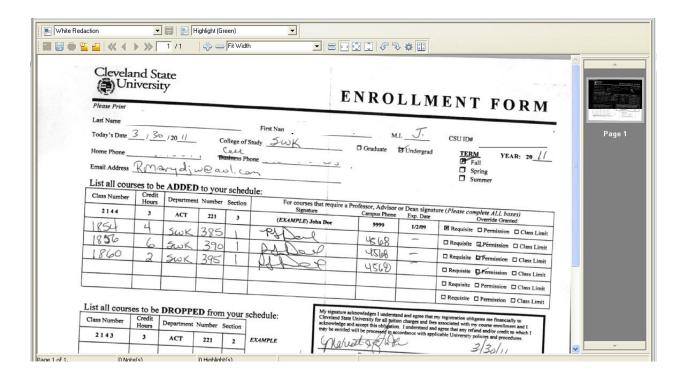


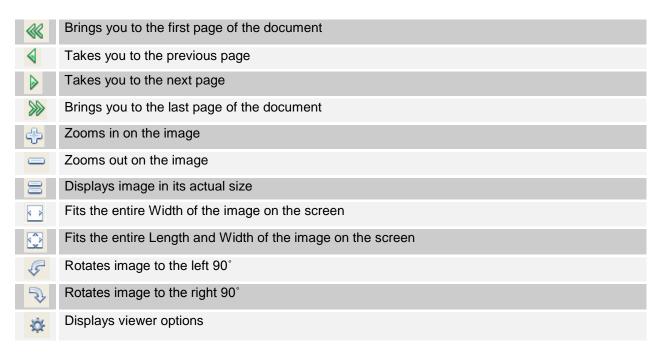
Wildcards

* Replaces multiple characters. (ADAMS* would retrieve ADAMS, ADAMSON, ADAMSTON, etc.)
 ? Replaces a single character. (SM?TH would retrieve SMITH, SMYTH, SMOTH, etc.)

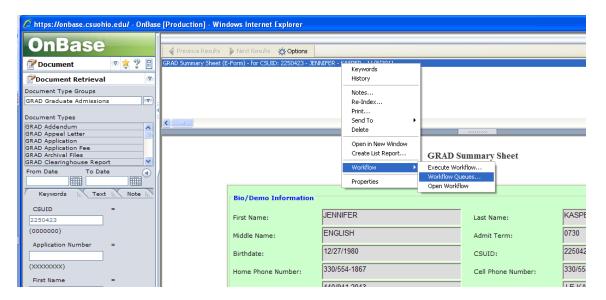


The Viewer Control Toolbar

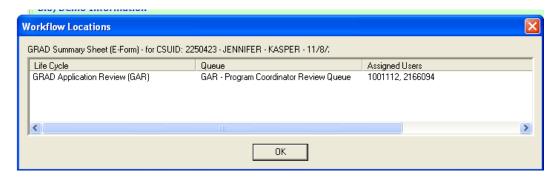




To view where a document is located in a workflow, complete a Document Retrieval, select the document you wish to locate, then right click and select Workflow>Workflow Queues.



A popup box will display the queue where the document is located in workflow.



You may then navigate to that queue in workflow to process the document.

3 OnBase Workflow

The OnBase Workflow Web Client provides users with web access to the workflow application in a Microsoft Windows based environment.

Definitions

Workflow

OnBase Workflow is an electronic document routing system that enables users to process work more efficiently, faster, and more accurately than with traditional paper processing. OnBase Workflow is beneficial whenever successive points of input or action are required in order to complete a task, process, or procedure. Workflow streamlines collaboration and accelerates the completion of critical business tasks.

Queue

Queues are the basic elements in a Workflow. A queue represents a document's current state or point in a process. Each queue is configured with specific activities (rules and actions) for evaluating a document. Once evaluated, the document is transitioned to another queue or life cycle or is removed from Workflow. Users access documents in Workflow by entering a particular queue. The quantity of documents in the queue at any given time typically represents the amount of work requiring attention.

Life Cycle

A life cycle is a collection of queues and transitions. Usually, a life cycle accomplishes a major function in a business process. In some cases, the life cycle itself may be a complete business process.

Within a life cycle, a document may exist in only one queue at a time. However, a single document can exist in multiple life cycles at one time.

Ad-Hoc User Tasks

Rules and actions configured as an Ad-Hoc User Task execute when a user chooses the task. Multiple Ad-Hoc User Tasks may be configured for a queue.

Workfolder

A workfolder is an electronic file that displays all documents related to the current document.

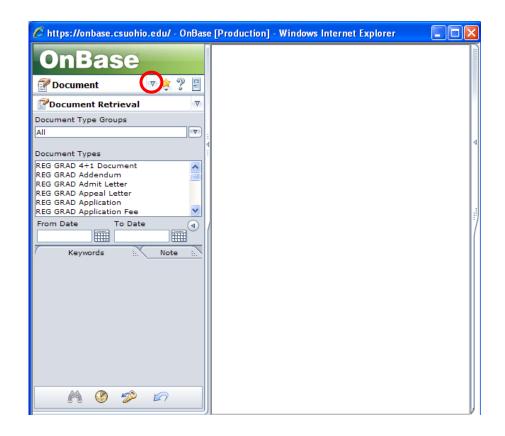
Workflow Web Client Toolbar

The Workflow Web Client toolbar icons become available based upon which active window in the Workflow Inbox is being used.

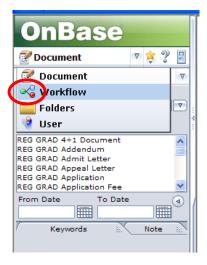
Icon	Name	Description
4	Back	Selecting the Back button switches focus from the Workflow window to the OnBase home window.
*	Filter Inbox	The Filter Inbox button is used to apply a custom query to the inbox.
22 22	Show Second Pane	The Show Second Pane button provides another viewing pane for displaying selected related documents.
	Display in Separate Window	Enabling this button will display a selected related document in a separate window.

Accessing OnBase Workflow

After logging into the OnBase Client, the default Document Retrieval screen appears. **The Context Drop Down-Down Select Button** appears directly below the OnBase logo.



Click the Workflow Icon from the Context Drop-Down Select List.

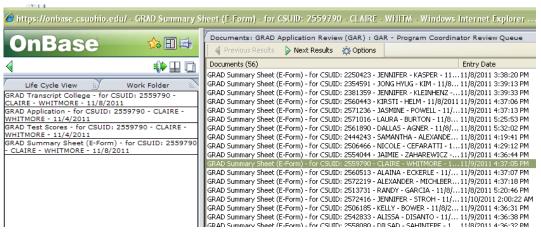


The Workflow Interface displays. This is a pop-up window; pop-up blockers may prevent this window from opening.





Click on a Queue to select the queue. Documents in the selected queue are listed in the **Documents Tab**.



Ad-hoc tasks for the selected queue appear directly below the Documents Tab.

The Workflow Queues

Program Coordinator Non Degree Queue



- Decision Selected: The coordinator has made a decision on the file.
- Remove: Removes the documents from the Lifecycle.

Program Coordinator Queue

This is the queue from which you will review complete student files for admissions decisions, refer to committee for review, refer to the Program Director for review, or send to International for review.



- Assign Faculty: Allows Coordinators to send documents to faculty for review.
- <u>Program Director Review</u>: Sends documents to the Program Director Review Queue
- <u>Decision Recorded</u>: The Coordinator has made an admission decision on the file
- International Review: Sends the documents to the International Review Queue.
- Remove: Removes documents from this Lifecycle.

Program Director Review Queue

This is the queue from which Program Directors will review complete student files or files sent from other queues for admissions decisions.



- <u>Decision Recorded</u>: The Director has made an admission decision on the file.
- Program Coordinator: Sends the documents back to the coordinator.

GRAD Incomplete Queue

This queue will hold students who have applied for your program, but have incomplete files. This queue can be viewed and the decision to send for review can be made. *Please note: decisions to waive requirements must be communicated via email to LaJohn Dammons.*



- Send for Review: Sends the documents to the Program Coordinator for Review.
- Remove: Removes documents from Lifecycle.

GRAD Unqualified Review Queue

This queue will hold students who have applied for your program, but do not meet established requirements. This queue can be viewed and the decision to send for review can be made.



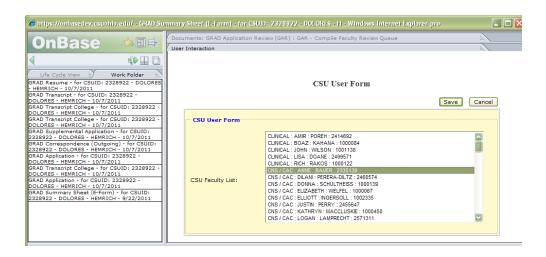
- Non Degree Review: Sends the documents to the Program Coordinator Non-Degree Queue
- Program Review: Sends the documents to the Program Coordinator Queue.
- Decision Recorded: An admission decision has been made on the file.

Compile Faculty Review Queue

This queue is where the Program Coordinator or Director can select committee members to review the file.

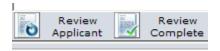


- Assign Faculty: Opens a User Form to select Faculty Reviewers
- Program Director Review: Sends file to Program Director Review
- Decision Recorded: An admission decision has been made on the file.
- International Review: Sends file to International Review Queue

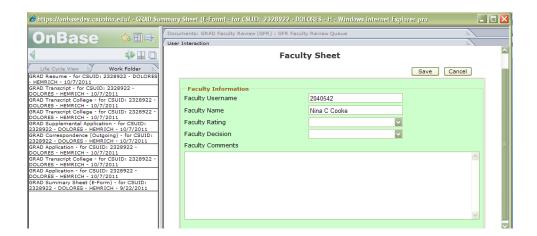


Faculty Review Queue

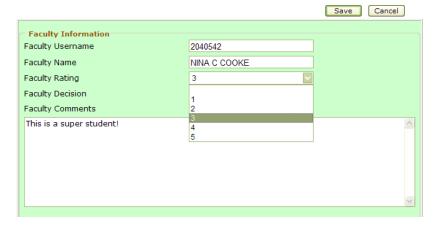
This is the queue in which faculty will access to review files assigned to them. Here, they will have the opportunity to rank, make comments and recommend an admit decision.

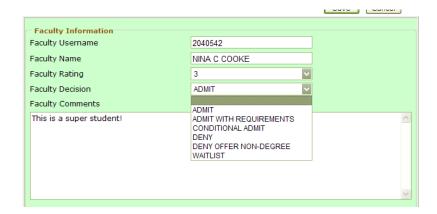


<u>Review Applicant</u>: Opens a User Form to enter ratings, decision and comments. <u>Review Complete</u>: Sends form for coordinator review.



Faculty Sheet





The Faculty Review Sheet (E-form) is added to the student record for Program Coordinator/Director access.



Making an Admission Decision

If you have the access to make an admission decision on a file, you will see the selections at the bottom of the summary page.



Admit

Regular Graduate Students have satisfied all requirements for admission to the College of Graduate Studies and to a graduate program, including the submission of all application materials.

Admit with Requirements

Some programs accept students who do not meet all departmental admission requirements. For example, a program may require both a 3.0 grade point average and GRE scores at the 50th percentile. Regular admission with requirements may be offered to an applicant with, for example, a 3.25 gpa and GRE scores in the 35th percentile. Regular admission with requirements means that the student must complete prescribed courses with minimum grades, as specified in the admission letter, or complete prerequisite courses, or attain a minimum grade point average in the first semester(s) of enrollment. Programs monitor the requirements, *not* Graduate Admissions.

International Conditional Admission

International applicants who meet the College of Graduate Studies and Program grade point and admission examination (GRE, GMAT, MAT, etc.) requirements, but fall short of meeting College of Graduate Studies English Language proficiency requirements, may be considered for conditional admission. For such applicants, the University ESL Coordinator in consultation with the academic program director will evaluate the student's English language skills, and when appropriate, prescribe an ESL program of study for a maximum of two semesters. Depending upon the English language skill level of the applicant, a program of ESL and academic course work will be developed. By the end of the student's second semester of study, all ESL and academic requirements for Regular Admission must be met. Otherwise such students will not be allowed to continue their graduate studies. The progress of conditional admits (international students) is monitored by Center for International Services and Programs.

Deny

The applicant meets neither Program nor Graduate College requirements. Denied students will not be offered the chance to be non-degree seeking in your program. Use if the applicant's

credentials are far too low to be considered, or if your program does not allow non-degree students.

Deny Offer Non-degree

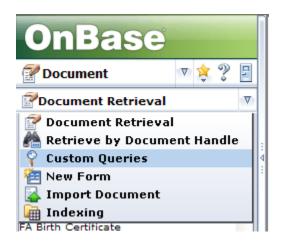
Program directors have the option of denying students admission but offering the opportunity to take courses as a non-degree student. These students must earn a minimum of 12 hours with a 3.00 gpa or better to become qualified as degree-seeking.

Waitlist

For applicants who meet Program requirements in limited-enrollment programs. These applicants could be admitted depending on the number of admits who accept the offer of admission.

4 Custom Queries

Custom Queries can be used to locate student documents or to identify a group of students based on defined criteria. The Custom Queries can be accessed by using the drop down arrow next to Document Retrieval.



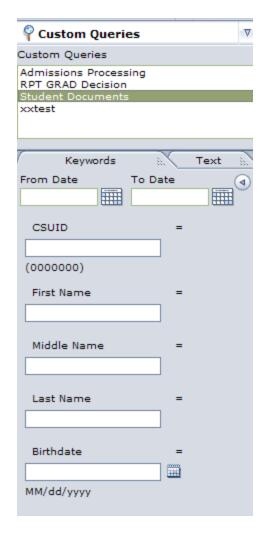
Select Custom Queries

Once selected you will see a menu of two queries

- -Student Documents
- -Rpt Grad Decision

Student Documents

This query should be used to locate all documents for a specific student. This will return documents related to the student, regardless of their career. Wildcards can be used here, as with Document Retrieval.



^{**}Helpful Hint** Search by student name using Wildcards, some documents may not be indexed with the student's ID number.

RPT GRAD Decision

The RPT GRAD Decision Custom Query can be used to review a group of students, based upon user defined information. For example, by entering a date range and decision, you could see a list of all the student admitted during a specific period. You can narrow the request by Decision, Admit Term, Program Code, and Plan.



5 Sample Letters

Admit Letter

tudent Name .ddress Student ID
ear:
congratulations! It is a pleasure to inform you that upon the recommendation of the Graduate Program committee in the College of you have been admitted to the Graduate program in as a regular, degree-seeking student. Your admission is effective semester 20 classes for the semester will begin
ou have been assigned a unique CSU ID number, noted above. You will need your ID number to egister for classes and for other business you conduct with the University. Additionally, your program hay contact you with more information.
s a graduate student, you must maintain a cumulate grade-point average of 3.0 to remain in good cademic standing. This regulation and other guidelines can be found in the Graduate Catalog, which is vailable online at csuohio.edu/gradcollege.
SU is the university of choice for talented students who are intellectually curious, serious about thei tudies, and intent on advancing their lives through higher education. I believe that you will find you rogram of study challenging and rewarding, and look forward to seeing you on campus soon.
Velcome to Graduate study at Cleveland State University!
incerely,

Jianping Zhu, Dean

Admit with Requirements

itudent Name Address	Student ID
Dear:	
Congratulations! It is a pleasure to inform you that upon the recommendation of the Gradua Programs Committee in the College of you have been admitted to the Gradua program in as a regular, degree-seeking student. Your admission is effective emester 20	luate
Your program director will contact you in the near future to discuss academic requirements y neet in order to remain in good academic standing. Additionally, you have been assigned a up number, noted above. You will need your ID number to register for classes and for other by you conduct with the University.	unique CSU
As a graduate student, you must maintain a cumulate grade-point average of 3.0 to remain in cademic standing. This regulation and other guidelines can be found in the Graduate Catalo vailable online at csuohio.edu/gradcollege.	_
CSU is the university of choice for talented students who are intellectually curious, serious tudies, and intent on advancing their lives through higher education. I believe that you worogram of study challenging and rewarding, and look forward to seeing you on campus soon	ill find your
Velcome to Graduate study at Cleveland State University!	
incerely,	
↑	

Jianping Zhu, Dean

	ID# Date
Name Address	
Dear:	
It is a pleasure to inform you that upon the recommendation of the Gradu College of you have been granted admission to the Gradu Semester 20 You have met the minimum qualifications for you have not met the College of Graduate Studies English Language proficien	nate program in for pur graduate program, but you

As a part of your admission, you must contact the English as a Second Language Program Director, Dr. Michele Bowman, at 216-875-9669 or m.s.bowman@csuohio.edu after your arrival on campus for a language evaluation. The testing will either release you from ESL courses or identify the course(s) you must take. You must complete whatever ESL courses are prescribed as a result of that evaluation within your first two semesters. You will not be allowed to register for classes until your language evaluation is complete.

As a graduate student you must maintain a cumulative grade point average of 3.0 to be in good academic standing. This regulation and other guidelines are contained in the Graduate Catalog which is available online (http://www.csuohio.edu/gradcollege/).

The University has assigned you a CSU ID number listed above; you will need your CSU ID number to register for classes and for all other business you conduct with the University.

If you have any questions regarding your admission please contact International Admissions (216.687.5599 or appstatus@csuohio.edu).

Welcome to graduate study at Cleveland State University. I hope you find your program of study challenging and rewarding.

Sincerely,

Jianping Zhu, Dean

Student Name
Address

Dear_____:

I regret to inform you that upon the recommendation of the Graduate Programs Committee in the College of ______ you have been denied admission to the College of Graduate Studies for the _____ semester, 20__.

I wish you well in all further academic endeavors. Thank you for your interest in the College of Graduate Studies at Cleveland State University.

Sincerely,

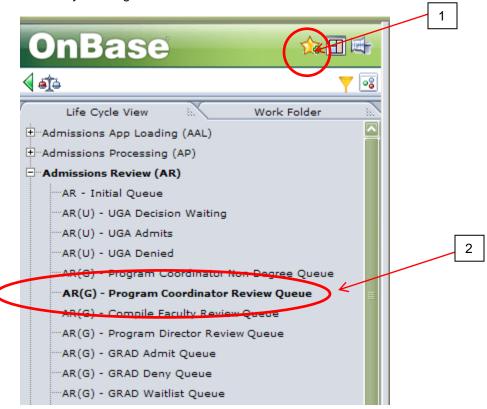
Student Name Address	Student ID
Dear:	
I regret to inform you that upon the recommendation of the Graduate Progr College of you have been denied admission to the College of semester, 20 Unfortunately, your credentials did not meet the star program.	of Graduate Studies for the
If you still wish to attend Cleveland State University, you may enroll in the Gradegree graduate student, complete a minimum of 12 graduate credit hours worked for the states of no less than 3.00, and reapply for degree-seeking status at that time. If you course of action, you must file a new, non-degree application. You will not be application fee again or to submit any additional documents.	with a grade-point average ou wish to pursue this
More information can be found at csuohio.edu/gradcollege/students/nonde	gree.
If you have any questions, please call 216-687-5599 or send e-mail to graduate.admissions@csuohio.edu. I wish you well in your academic endeav	vors.
Sincerely,	
_ ^ _	

Jianping Zhu, Dean

6 Tips and Tricks for OnBase

Make your Program Coordinator Review queue your Home Page!

1. Navigate to Workflow and your Program Coordinator Review Queue



- 2. Select the Gold Star for Add to Favorites
- 3. Name your favorite.

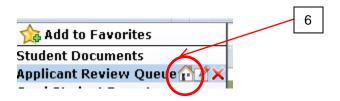


5. Go to main OnBase page and select the Gold Star to display Favorites

5



6. Hovering on a Favorite displays the Home, Edit, and Delete icons. To make a Favorite your home page, click the Home icon.



Next time you sign into OnBase, this page will automatically open.

Recommended Favorites for Program Coordinators / Directors

