



ADD/DROP/WITHDRAW PETITION USER GUIDE FOR STATUS REPORT

CONTENTS

Access to OnBase Reports	2
Setting Search Parameters	4
Search Results View	6
Determining the Status of Add/Drop Petition	9
Download Report	10
Timeline for Add/Drop/Withdraw form workflow.....	12
Add Forms	12
Drop Forms.....	13
Individual Class Withdrawals (Drops after the 4 th week of school)	13

After an Add/Drop/Withdraw petition is submitted, the form flows through the workflow queues to be processed by different staff and offices.

Department staff and faculty can use Dashboard Report in OnBase to look up status of submitted Add/Drop forms.

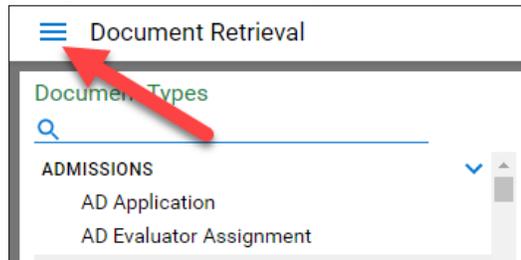
ACCESS TO ONBASE REPORTS

1. On your web browser, go to <http://my.csus.edu>
2. Log in with your SacLink account
3. Click “Onbase Web Client” under the Faculty/Staff Related Links

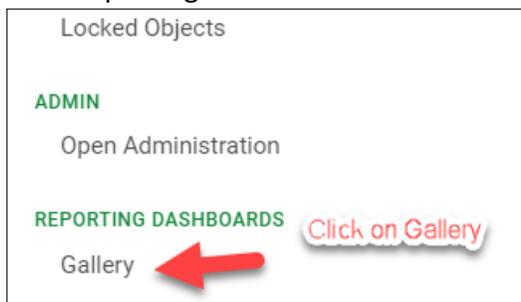
The screenshot displays the my.csus.edu dashboard. On the left is the 'Employee Center' menu with options: COVID-19 Vaccination Certification, Employee Center, Report Absences, Compensation History, Current Leave Balance, View Paycheck, CSU Learn, LinkedIn Learning, and Personal/Campus Directory/ENS. On the right, there is a 'System Advisory' box for Fall 2022 Tech Essentials, an 'ENS Update Your Notification Preferences' banner, and icons for Canvas, Email, Forms, and OneCard. Below these is the 'Faculty/Staff Related Links' section, which includes: Adobe Sign, Cal Employee Connect, CHRS Recruiting - Page Up, Cognos, CSYou Portal, EAB Navigate - Advising Appointment Scheduling, Library, LinkedIn Learning, Onbase Web Client (highlighted with a red arrow), and Onbase Workflow/Approval Processing.



Once in OnBase, click on the hamburger menu on the top left corner of the OnBase screen.

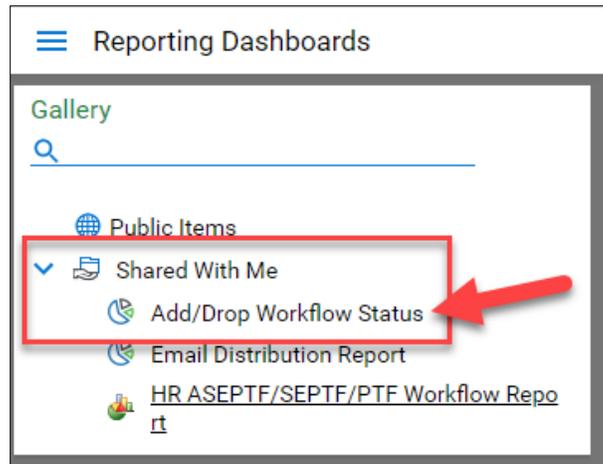


From the drop-down menu, look for "Reporting Dashboards" and click "Gallery".



Once you are in the Gallery view, click "Add/Drop Workflow Status" report under the "Shared with me" menu.

Note: Depending on your user group permission in OnBase, you might see more than one (1) report on the list.



After selecting the Add/Drop Workflow Status report, the parameters screen will appear on the right.

SETTING SEARCH PARAMETERS

A screenshot of a dialog box titled "Add/Drop Workflow Status". The dialog contains the following fields and controls:

- EmplID: A text input field.
- Form #: A text input field.
- Submit Date: A date range selector with two calendar icons and a minus sign between them. Below it is the label "MM/dd/yyyy".
- Form Type*: A dropdown menu with "ADD" and "DROP" as options.
- Term: A text input field.
- First Name: A text input field.
- Last Name: A text input field.
- Term Code: A text input field.
- Save Parameters: A checkbox.
- At the bottom right, there are "OK" and "Cancel" buttons.

You can use any combination of the parameters for your search (Form Type selection is REQUIRED):

Important Note:

Depending on the number of records in the search, the run time for the report may vary by the search parameters. Users are recommended to use student ID number or a date range to limit the search.

- **EmplID** - Student ID number
- **From #** - The unique number that is assigned to each Add/Drop/Withdraw petition
- **Submit Date** - To search by Submit Date, you need to provide the start date AND the end date
- **Form Type** - You are **REQUIRED** to select a form type for the search. The form type you selected will be highlighted in blue. If you want to search **BOTH add and drop** forms, click “Add”, then hold down “Ctrl” key on your keyboard while clicking on “Drop” to select both.
- **Term** – A specific semester. Search example: Fall 2022, Spring 2022, or Summer 2021
- **First Name, Last Name** - Users are recommended to search first name in combination with last name or other criteria to reduce the run time for the search.

For the parameters that requires text input, such as first name and last name, you can search by partial information if needed

There are 2 types of partial search:

- ❖ If you are unsure of exact number of characters, use “*” symbol to represents **one (1) or more unknown characters**.

Example:

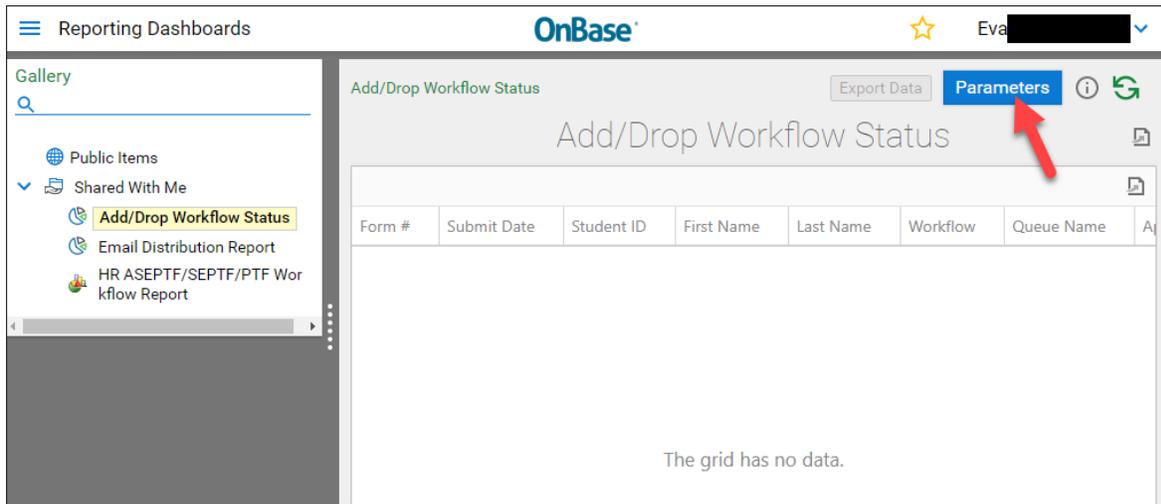
- Search for first name **starts with “E”** – In the search field, type in “E*”. The search results will show student forms with first name starts with “E”.
- Search for first name **ends with “E”** – In the search field, type in “*E”. The search results will show student forms with first name ends with “E”.
- Search for first name **starts with “E” and ends with “A”** – In the search field, type in “E*A”. The search results will show student forms with first name starts with “E” and ends with “A”. e.g., Elena, Emma, Esmeralda.

- ❖ If you know the exact number of characters but are unsure of the exact spelling. You can use “?” symbol to represents **one (1) unknown character**.

Example:

You are unsure of a student’s first name is either “Erica” or “Erika”. Type in “Eri?a” in the first name field, you will receive results of students with first names of Erica, Erika, or Eriva.

- **Term Code** – The 4-digit numbers that references to a specific semester.
- **Save Parameters** - By selecting this checkbox, your search parameters will be saved as default. Once you saved the search parameters, every time you access this report, a search will run automatically with the saved parameters. To change parameters, click on the “Parameters” button on the top right corner to modify your search criteria.

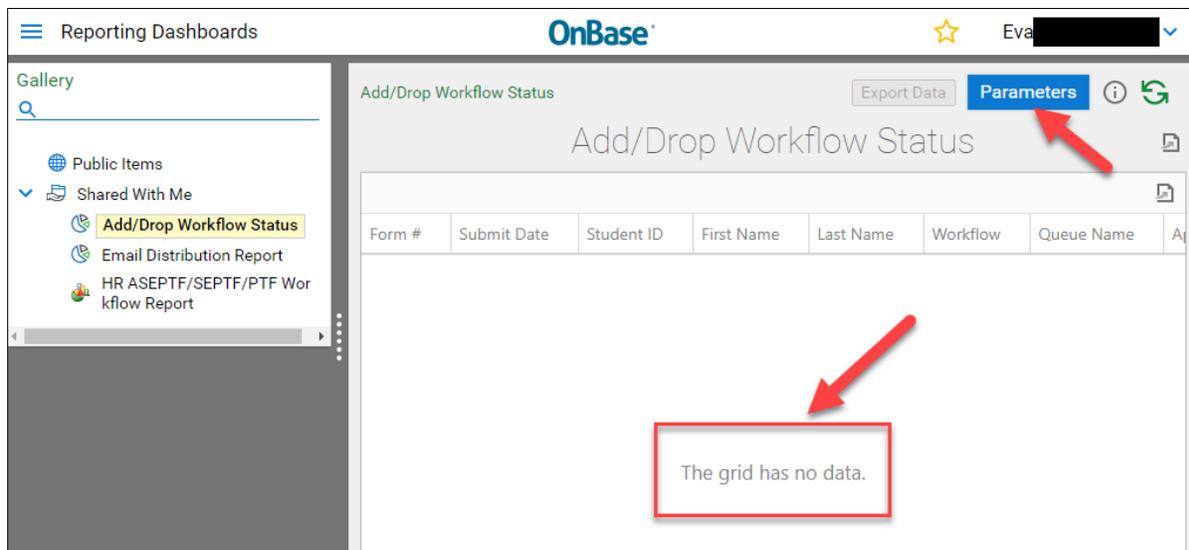


When finished, click “OK” button.

The screenshot shows a 'Parameters' dialog box. It contains several input fields: 'First Name', 'Last Name', and 'Term Code'. Below these fields is a checkbox labeled 'Save Parameters'. At the bottom right of the dialog, there are two buttons: 'OK' and 'Cancel'. A red arrow points to the 'OK' button.

SEARCH RESULTS VIEW

When there are no records found for the search, the report screen will show “The grid has no data”. You can click on the “Parameters” button to reset your search criteria.



When records are found based on your set parameter, the report screen will list all the forms matching the search criteria.

Move the mouse to be bottom of the report to locate the scroll bar. Drag the scroll bar to the right to show additional columns.

Add/Drop Workflow Status

Export Data Parameters

Add/Drop Workflow Status

Form #	Submit Date	Student ID	First Name	Last Name	Workflow	Queue Name	Approving
148	10/2/2022	30			REG - Forms	Recently Processed	SUSAN PE
148	10/2/2022	30			REG - Forms	Recently Processed	MARIA QU
148	10/2/2022	30			REG - Forms	Recently Processed	DORCAS C
148	10/2/2022	21			REG - Forms	Recently Processed	SUSAN PE
148	10/2/2022	30			REG - Forms	Recently Processed	COURTNE
148	10/2/2022	30			REG - Forms	Recently Processed	ANITA SC
148	10/2/2022	30			APPROVAL	Pending Approvals	PREETPAU
148	10/2/2022	30			REG - Forms	Recently Processed	TIM FONC
148	10/2/2022	30			REG - Forms	Recently Processed	STEPHAN
148	10/2/2022	30			REG - Forms	Recently Processed	JULIE FOG
148	10/2/2022	21			REG - Forms	Recently Denied	JEFF NOK

Drag the Scroll Bar for more columns on the right

- **Form #** - The unique number that is assigned to each Add/Drop/Withdraw petition
- **Submit Date** - The date the Add/Drop petition received in OnBase
- **Student ID, First Name, Last Name** – The student information of the form. If a student submits more than one (1) Add/Drop petition, multiple records for the student will be listed.
Example: If a student submits one (1) add form for ENGL 5 course and one (1) add form for MATH 24 course, there will be two (2) records of the same student due to the Add petitions are for different courses.

- **Workflow** - The workflow which the form is currently under. (Depending on your user group permission, you may see different workflows and queues.)

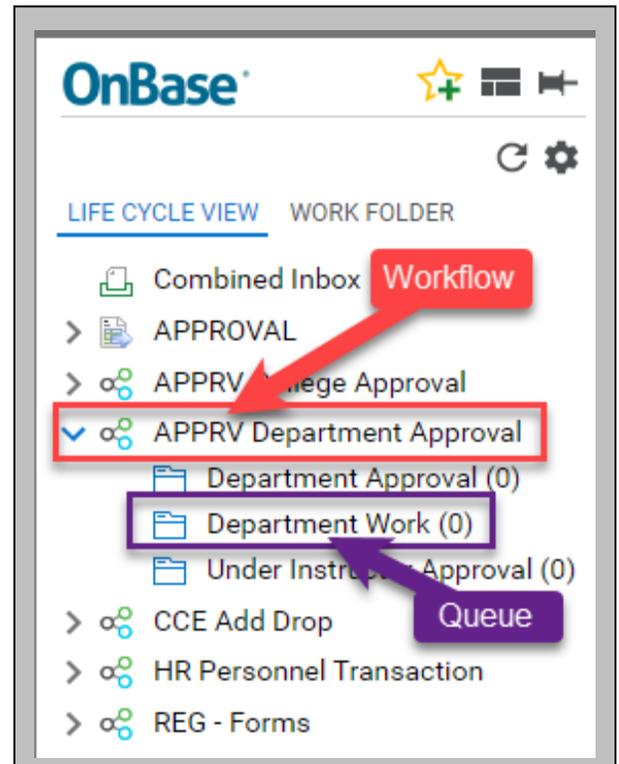
- ❖ Approval: The form is in the instructor’s approval workflow
- ❖ APPRV College Approval: The forms in in the College Approval workflow
- ❖ APPRV Department Approval: The form is in the Department Approval workflow
- ❖ CCE Add Drop: The form is in the CCE process workflow. (Summer and Winter terms)
- ❖ REG - Forms: The form is in the Registrar’s workflow

- **Queue Name** - The queue that the form is currently under.

- ❖ Add/Drop Documents: The form is under the Registrar’s review
- ❖ CCE Recently Denied: The form has been denied by the CCE office (Summer and Winter term)
- ❖ CCE Recently Processed: This form has been processed by the CCE office. (Summer and Winter term)
- ❖ Dean Approval: The form is under College Dean’s review
- ❖ Department Approval: The form is under Department Chair’s review
- ❖ Department Work: The form is under Department staff review (before Census date, the Department staff processes the final approved form and enters the information into CMS. Please see [Timeline for Add/Drop/Withdraw](#) section for details)
- ❖ Documents On Hold: The form is on hold waiting for students to take actions on unmet requirements
- ❖ Pending Approvals: The form is under the instructor review
- ❖ Recently Denied: The form has been denied and is filed for record keeping
- ❖ Recently Processed: The form has reached its final stage of the workflow and is filed for record keeping

- **Department Process Status** – The status of the form

- ❖ Approved: The form has been approved and entered into CMS
- ❖ CCE Office Approved: The form has been approved by the CCE office (Summer and Winter term)
- ❖ CCE Office Denied: The form has been denied by the CCE office (Summer and Winter term)
- ❖ Department Denied: The form has been denied by the Department level either by the department chair or the department staff
- ❖ On Hold: The form is on hold waiting for students to take actions on unmet requirements
- ❖ Registrar Denied: The form has been denied by the Registrar’s office
- ❖ Under College Approval: The form is currently under College Dean’s review



- ❖ Under Department Approval: The form is currently under the Department Chair's review
- ❖ Under Instructor Approval: The form is currently under the course instructor's review
- ❖ Under Registrar Review: The form is currently under Registrar's review

- **Approving Instructor** - The instructor teaching the course
- **Add/Drop** - The form type for the petition
- **Term Code** - The 4-digit numbers that references to a specific semester
- **Term** - The semester for the petition
- **Session** - Describe the specific session within the term
- **Course Subject, Course Number, Course Section** - These three (3) fields identify the specific course for the petition.
- **Department Name** - The department which the course belonged
- **College Name** - The college which the course belonged
- **Document Type** - The specific document that is categorized in OnBase. For Add/Drop petition, the document type is SR-Add/Drop/Withdraw E-Form
- **Comments** - The comments by either Department Staff, Registrar's office or CCE office.

DETERMINING THE STATUS OF ADD/DROP PETITION

The combination of Workflow, Queue Name and Department Process Status provides users with an overall status of a form:

Example 1:

Workflow	Queue Name	Approving Instructor	Document Process Status	
REG - Forms	Recently Processed	[REDACTED]	APPROVED	↑

This form has been approved by the registrar's office and has been recorded in CMS.

Example 2:

Workflow	Queue Name	Approving Instructor	Document Process Status	
REG - Forms	Recently Denied	[REDACTED]	DEPARTMENT DENIED	↑

This form has been denied at the department level and the form is in the Registrar's queue for record keeping.

Example 3:

Workflow	Queue Name	Approving Instructor	Document Process Status	Add/Drop
APPROVAL	Pending Approvals	J [REDACTED] NGUYEN	UNDER INSTRUCTOR APPROVAL	DROP

This DROP petition is waiting for Instructor J. Nguyen's approval.

Example 4:

Workflow	Queue Name	Approving Instructor	Document Process Status	Add/Drop
APPRV College Approval	Dean Approval	[REDACTED]	UNDER COLLEGE APPROVAL	ADD

This ADD petition is waiting for the College Dean's approval.

Example 5:

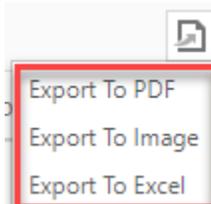
Workflow	Queue Name	Approving Instructor	Document Process Status	Add/Drop
REG - Forms	Recently Denied	[REDACTED]	REGISTRAR DENIED	DROP

This DROP form has been denied by the Registrar's office and is in the registrar's queue for record keeping.

DOWNLOAD REPORT

To download the report from OnBase to your local computer, click on the "Export" icon located on the top right corner of the report. The export options will appear.

Name	Approving Instructor	Document Process Status	Add/Drop	Term Code	Term	Session	Cou



- Export to PDF (**NOT RECOMMENDED**) – The report will be saved as PDF file and is not editable. Due to the number of columns in the report, the columns will be compressed to a single character in each field.
- Export to Image (**NOT RECOMMENDED**)– The report will be saved as an image file and is not editable. Due to the number of columns in the report, the columns will be compressed to a single character in each field.
- Export to Excel – The report will be saved as an excel file. Users can edit and sort the reports in Microsoft Excel.

Click "Export to Excel" and an export information screen will appear.

Export To Excel

File Name:

Excel Format: XLSX

Separator: ,

Include: Filters Parameters

Position: Below

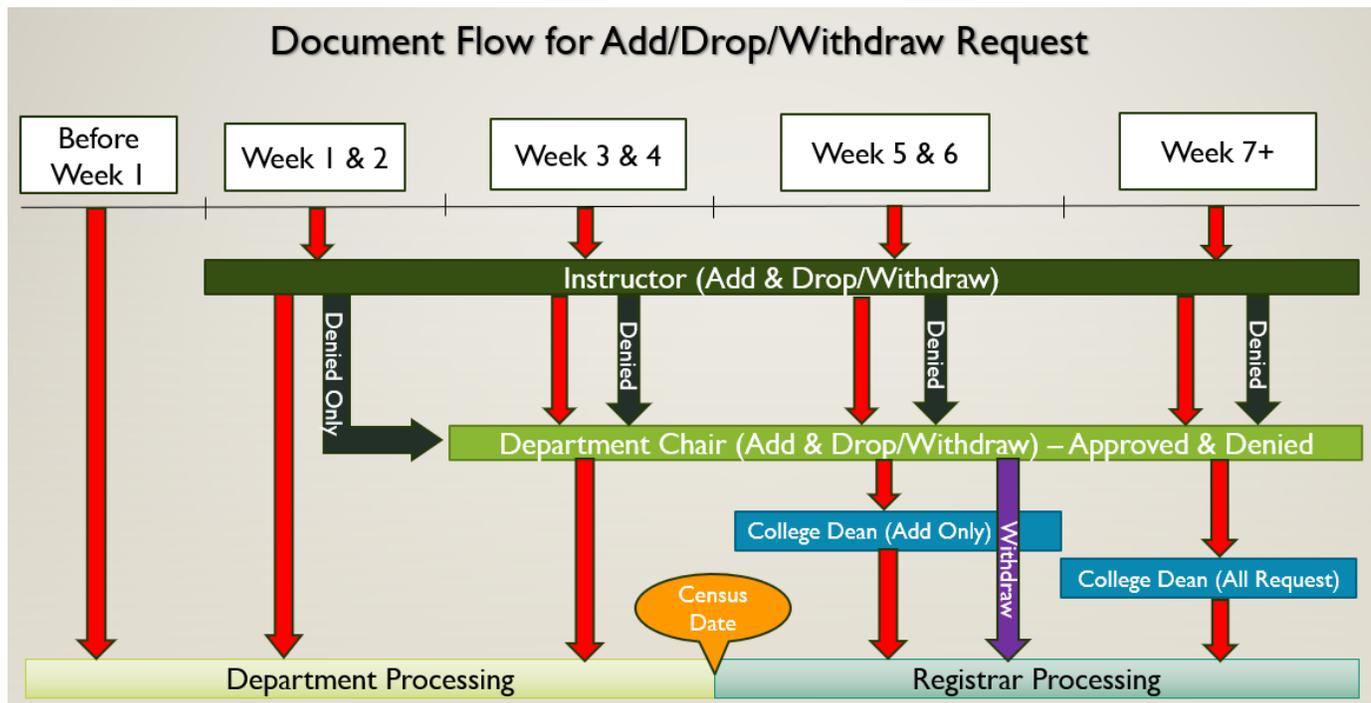
Reset Export Cancel

- File Name – Provide the name for the exported report
- Excel Format – For standard excel file, choose XLSX (newer version of excel) or XLS (older version of excel)
- Separator – This field is only available if you choose CSV for the Excel Format. Please leave it as is.
- Include – This function is currently inactive
- Position – This function is currently inactive

Click “Export” when finished filling out the information. A file will be downloaded to your local computer.

TIMELINE FOR ADD/DROP/WITHDRAW FORM WORKFLOW

Depending on the week of the semester, the add/drop/withdraw form will need additional approvers. Below is the approval flow for each term.



ADD FORMS

Before Week 1: STUDENT – DEPARTMENT PROCESSING

Students adjust their schedule via My Sac State or Submit add/drop/withdraw request go directly to Academic Dept staff for processing

Starting week 1, all instructor denied requests go to department chair for review.

Weeks 1-2: STUDENT – INSTRUCTOR – (DEPARTMENT CHAIR IF DNIED BY INSTRUCTOR) - DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 3-4: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Department Chair for approval

Weeks 5-end of term: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – COLLEGE DEAN – REGISTRAR PROCESSING

DROP FORMS

Before Week 1: STUDENT – DEPARTMENT PROCESSING

Students adjust their schedule via My Sac State or Submit add/drop/withdraw request go directly to Academic Dept staff for processing

Starting week 1, all instructor denied requests go to department chair for review.

Weeks 1-2: STUDENT – INSTRUCTOR – (DEPARTMENT CHAIR IF DENIED BY INSTRUCTOR) - DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Academic Dept staff for processing

Weeks 3-4: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR - DEPARTMENT PROCESSING

If no instructor is assigned to the course, the add/drop/withdraw request go directly to Department Chair for approval

INDIVIDUAL CLASS WITHDRAWALS (DROPS AFTER THE 4TH WEEK OF SCHOOL)

Weeks 5 & 6: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – REGISTRAR PROCESSING

Weeks 7 – end of term: STUDENT – INSTRUCTOR – DEPARTMENT CHAIR – COLLEGE DEAN -- REGISTRAR PROCESSING

-----End of Instructions -----