Declaration of Major - Department

Declaration of Major/Minor OnBase Workflow – Department Process

Once a student submits an online Declaration of Major/Minor Form (DOM/M), the designated person within your department must access and process the form through an OnBase workflow process before it is sent to the University Registrar’s Office for processing in PeopleSoft (OPUS).

Department Instructions for processing a DOM/M request:

<table>
<thead>
<tr>
<th>Step 1 - Login to OnBase through the OnBase Web Client at <a href="https://imaging.emory.edu">https://imaging.emory.edu</a>.</th>
<th><img src="image" alt="OnBase Workflow" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Click on the down arrow located next to “Document” and select “Workflow” from the dropdown.</td>
<td></td>
</tr>
</tbody>
</table>

| Step 2 (Optional) – To change the layout view, click on the Workflow Layout Option and select preferred view. |
| | ![OnBase Workflow Layout Options](image) |

| Step 3 – Under the “Life Cycle View” tab, click the arrow beside the folder titled, “SRA UCOL Declaration of Major/Minor”. |
| | ![OnBase Life Cycle View](image) |

You should see two folders:

- **SRA DOM New Request (Dept)** – New DOM/M requests for department processing will land in this folder.
- **SRA DOM Request Holding (Dept)** – This folder will house new requests that you move from the SRA DOM New Request (Dept) folder that are waiting for next steps from the student. (We will talk more about this later)

Select: SRA DOM New Requests (Dept)
Step 4 – A list of pending DOM/M forms will display for processing in the inbox. By clicking on the desired row, the DOM/M will display to the right or bottom (depending on your view).

Note: You can sort the Inbox by clicking on any of the header titles.

Understanding the Form:

- **Student Information**: Includes fields for Student EMPLID, Student Name, Student Phone Number, Email Address for Notifications, and more.
- **Add/Change Request**: Specifies what action is taken (e.g., DECLARE NEW PRIMARY MAJOR).
- **Dept/Advisor Info**: Fields for Processing Status, Advising Appointment Date/Time, and Processing Notes.

**Instructions for Registrar:**

This box is used to notify the Registrar's Office if student changes their DOM request after meeting with the department.
Step 5 – Depending on your departmental process, you can:

- Cancel the Request (see instructions on cancelling a request)
- Submit the form to OUE due to a routing error (see instructions on routing error)
- Assign an advisor
- Enter Department meeting date & time
- Add Notes
- Do nothing at this point and wait for student to contact department for appointment

If changes are made, click save.

Note: If you want to move the form out of the New Request folder to de-clutter the folder, you can select “Dept Hold” and the form will move to the Dept holding folder until you are ready to process the form. Or, you can leave it in the New Request folder for processing later.

Step 6 – When all departmental processes are satisfied and you are ready to approve the request, do the following:

- Open the form up from the New Request or Holding folder
- Change the Processing Status to “Request Approved”
- Enter the Advisor Name (optional)
- Enter the AdvisorEMPLID (required if you enter an advisor name)
- If anything on the form changes after meeting with the student, add instructions for the Registrar under the “Change Detail” section.
- Click Save

Step 7 – To complete the department approval process, you must click “Send to Registrar”. This will remove the form from your New Request or Holding folder and send to the Registrar for OPUS processing.

Note: When the Registrar offices completes the data entry in OPUS, you and the student will receive a confirmation email.

To track the form status, see instructions on tracking a form.
The student DOM will flow through OnBase as follows:

Follow the solid lines. Dashed lines (pink) are automatic email notifications, and dotted lines (white) are informational.

**Color Code:**
- Green – Student Initiates Form
- Pink – Automatic Email Notifications
- White – Informational
- Blue – Department Processes
- Gold – Registrar Processes
- Orange – School Process
- Red – Complete
Retrieving a Document from OnBase (after workflow is completed):

**Step 1** – Login to OnBase using the Unity Client or the Web Client at [http://imaging.emory.edu](http://imaging.emory.edu).

Under Document Types, you should see two folders:

- **SR – UCOL DOM Department Form (Unity)** – Use this folder to retrieve DOM/M requests that have completed workflow for your department.
- **SR – DOM Student Form (Unity)** – Use this folder to retrieve DOM/M requests that have been completed if you want to see ALL DOM/M requests submitted and processed by a student. This option will return ALL forms processed for a student regardless of department.

For this illustration, we are looking for DOM/M requests that have completed workflow for a particular department. **Select, SR – DOM Department Form.**

**Step 2** – You should now see keyword search options. You can search by any of the keywords listed. In most cases you will search by EMPLID or Last and First Name.

**Enter Search Criteria (3)** – For this illustration we will search by last name of Smith.

Click the **Binocular icon (4)** and results will appear in the “documents” window.

**Double click** on the student you are looking for from the Documents window (5).

The archived form will display (6).
How to Cancel a Request:

If the student decides to cancel his/her DOM/M request for your department, follow these steps to cancel the request and remove the form from workflow:

**Step 1** – Click on the down arrow located next to “Document” and select “Workflow” from the dropdown.

**Step 2** – Under the “Life Cycle View” tab, click the arrow beside the folder titled, “SRA UCOL Declaration of Major/Minor”. You will see two folders, select the one titled, SRA DOM New Requests (Dept).

**Step 3** – A list of pending DOM/M forms will display for processing in the inbox. Find the request you want to cancel and click once on the row. The DOM/M will display to the right or bottom (depending on you view).

**Step 4**
- Change the Processing Status of the form to “Request Cancelled”
- Click on the “Save” button
- Click on the “Cancel Request” button.

This will archive the form and remove it from the workflow process.
### Re-routing a Form Received in Error

On occasion a DOM/M form might land in your New Request folder that doesn't belong there. This can happen if the contact information is not set up correctly. If this happens you want to re-route the form to the Office of Undergraduate Education so they can fix the problem.

**Step 1** – Click on the down arrow located next to “Document” and select “Workflow” from the dropdown.

<table>
<thead>
<tr>
<th><img src="image1.png" alt="OnBase Workflow" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document</strong></td>
</tr>
<tr>
<td><strong>Status/View</strong></td>
</tr>
<tr>
<td><strong>User</strong></td>
</tr>
</tbody>
</table>

**Step 2** – Under the “Life Cycle View” tab, click the arrow beside the folder titled, “SRA UCOL Declaration of Major/Minor”. You will see two folders, select the one titled, SRA DOM New Requests (Dept).

<table>
<thead>
<tr>
<th><img src="image2.png" alt="OnBase Life Cycle View" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Life Cycle</strong></td>
</tr>
<tr>
<td><strong>Combined Inbox</strong></td>
</tr>
<tr>
<td><strong>SR - Withdrawal and LOA</strong></td>
</tr>
<tr>
<td><img src="image3.png" alt="Folder Selection" /></td>
</tr>
<tr>
<td><strong>SRA DOM New Requests (Dept)</strong></td>
</tr>
</tbody>
</table>

**Step 3** – A list of pending DOM/M forms will display for processing in the inbox. Find the request that routed to your department in error. The DOM/M will display to the right or below (depending on you view).

<table>
<thead>
<tr>
<th><img src="image4.png" alt="Emory University Major/Minor Change Request" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td><strong>Advising Group</strong></td>
</tr>
<tr>
<td><strong>Request Summary</strong></td>
</tr>
<tr>
<td><strong>Requester</strong></td>
</tr>
<tr>
<td><strong>Routing Error</strong></td>
</tr>
</tbody>
</table>

**Step 4** - Click on the “Routing Error” button and the form will automatically route to OUE.

<table>
<thead>
<tr>
<th><img src="image5.png" alt="Routing Error Button" /></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dept Hold</strong></td>
</tr>
</tbody>
</table>