

E-Doc Lite Ph.D. Commencement Participation Application

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Accessing the System

Where is the Ph.D. Commencement Participation Application located?

The University Graduate School E-Doc systems are accessed through OneStart: <https://onestart.iu.edu/>. They are located in the **University Graduate School – Bloomington** or **Graduate Office – IUPUI** pages in the Group Quick Links section.

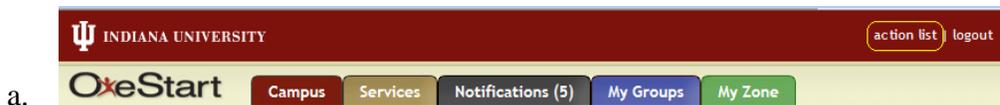
The image shows a screenshot of the OneStart interface. On the left, a 'Group Quick Links' menu is visible with two items highlighted by red boxes: 'Graduate Office - IUPUI' and 'University Graduate School - Bloomington'. On the right, a dark blue header reads 'Ph.D. Commencement Participation Application'. Below the header, the text says 'Please complete the application below if you would like to participate in the Ph.D. Commencement Participation Application in the University Graduate School - Bloomington program.' It also includes the instruction '**Only submit one application.' and a bullet point with a link to 'Ph.D. Commencement Participation Application'.

Setting Your Action List Preferences

You access your action list through OneStart. Your action list can be customized to suit your needs if you like.

Notifications >> Action List >> Preferences

1. Click the **action list** link in OneStart. It's at the top right corner of OneStart.



2. In your Action List you will see a link for Preferences to the right of the workflow logo
3. Click the **Preferences** link

Color coding recommendations for your action list

You also might find it useful to color code your action list. I recommend color coding the following Document Route Statuses.

- Saved
- Disapproved
- Final

Be sure to click **Save** before returning to your **Action List**.

Entering Data into the Ph.D. Commencement Participation Application

Entering data into the Ph.D. Commencement Participation Application form should be straightforward. This section will cover the parts of the form that are not.

What to do if you have issues with the form

1. If you have questions about completing the form, please refer to the contact information shown on the OneStart Graduate School group page. Instructions for navigating to this page are found on page 2 of this document.
2. If you have a technical question about the form, contact Beth Nicodemus, ejnic@iu.edu (812) 855-8854.

Initiating the application

1. The student will complete the form, most of the fields are straightforward.
 - a. Middle name is required, this is to help identify the student if they should incorrectly enter the university id or some other identifying information. If the student does not have a middle name they can enter a dot “.”
2. They will click **submit** and it will route to whoever was designated by your department to receive the form.

How does the system know who to route the form to?

By the Department that is selected by the student:

This system is based on route nodes, people are assigned to these nodes which are linked to the application. The nodes are in a particular order, so when a document is routed, it will go to the right person, in the right order. That node then looks at your document to see what department has been selected to determine which workgroup the document should be routed to for approval. A workgroup is comprised of an approver and in most cases a back-up for that approver. Once one of them has approved the document, it will route to the next node. If your school or department does not have a workgroup at a particular node, the document will skip the node and move to the next one.

Be sure your students select the correct department to ensure their form is routed correctly. Contact Beth Nicodemus, ejnic@iu.edu (812) 855-8854 if you discover a student has selected the incorrect department. You may also receive a form in error. If you do, please return it to the student to correct.

Attaching Documents

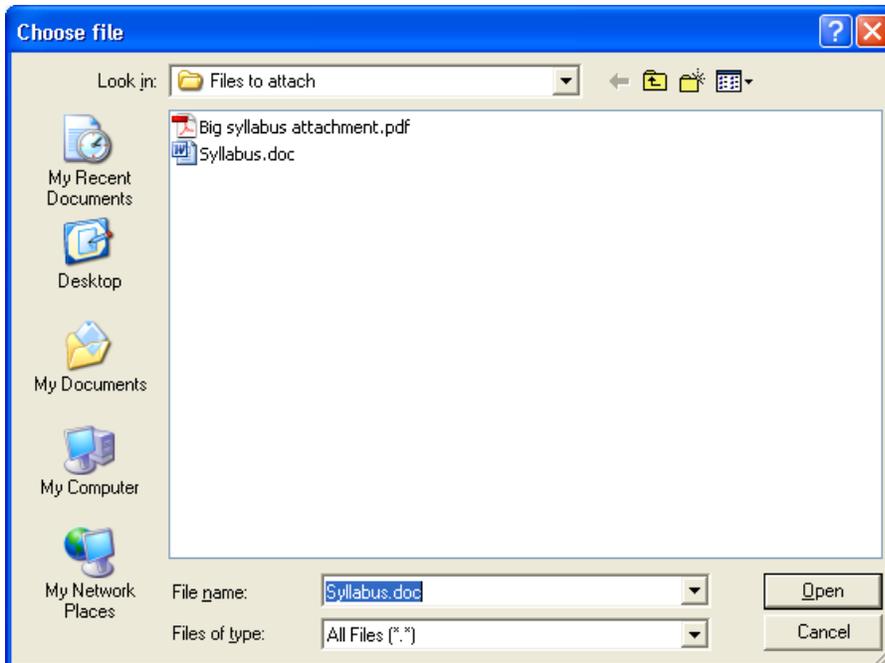
Any number of documents can be attached to the form.

How to Do This

1. Go to the **Create Note** section at the bottom of the form.

| Create Note | | | |
|-----------------------|------------|--|-------------------------------------|
| Author | Date | Note | Action |
| Jennifer Young Rigsby | 08/24/2007 | <div style="border: 1px solid gray; height: 30px; width: 100%;"></div> <div style="text-align: right;">↑ ↓</div> | <input type="button" value="save"/> |
| | | Attachment: <input type="text" value=""/> <input type="button" value="Browse..."/> | |

2. Click the **Browse** button to search for the file to attach.
3. Select the file to attach and click the **Open** button



4. The file is now attached to the note. Click the **save** button so that the note will attach to the form. *The save button must be clicked before the document is submitted or approved.*

| Create Note | | | |
|-----------------------|------------|--|-------------------------------------|
| Author | Date | Note | Action |
| Jennifer Young Rigsby | 08/24/2007 | <div style="border: 1px solid gray; height: 30px; width: 100%;"></div> <div style="text-align: right;">↑ ↓</div> | <input type="button" value="save"/> |
| | | Attachment: <input type="text" value="G:\GRAD\jyrigsby\Rerr"/> <input type="button" value="Browse..."/> | |

5. When the note is saved with the attachment it will look like this:

| Create Note | | | |
|-----------------------|------------------------|---|---|
| Author | Date | Note | Action |
| Jennifer Young Rigsby | 08/24/2007 | <div style="border: 1px solid gray; height: 30px; width: 100%;"></div> Attachment: <input type="text"/> <input type="button" value="Browse..."/> | <input type="button" value="save"/> |
| View Notes | | | |
| Author | Date | Note | Action |
| Jennifer Young Rigsby | 08/24/2007 01:26 PM | Syllabus.doc download | <input type="button" value="edit"/> <input type="button" value="delete"/> |

6. As you can see, more than one note can be attached.

Saving the Form

You may have made changes to the form, but are not ready to submit it. The edoc system does not automatically save the information you have entered into the form, if you plan to close it without submitting it, you will need to click the **save** button.

There are two save buttons at the bottom of the form, it is important not to confuse them.

| Create Note | | | |
|---|------------|---|-------------------------------------|
| Author | Date | Note | Action |
| Jody Smith | 04/13/2010 | <div style="border: 1px solid gray; height: 30px; width: 100%;"></div> Attachment: <input type="text"/> <input type="button" value="Browse..."/> | <input type="button" value="save"/> |
| <input type="button" value="submit"/> <input type="button" value="save"/> <input type="button" value="cancel"/> | | | |

You will need to click the **save** button at the bottom of the form, it is between the **submit** and **cancel** buttons.

After clicking this button you can close your document. It will move to your action list with a **Route Status** of *Saved* and an **Action Requested** of *Complete*.

When you finish filling in the form, the buttons at the bottom will have changed to:

| | | | |
|--|-------------------------------------|---|---------------------------------------|
| <input type="button" value="approve"/> | <input type="button" value="save"/> | <input type="button" value="complete"/> | <input type="button" value="cancel"/> |
|--|-------------------------------------|---|---------------------------------------|

These buttons do the following:

- **approve** – routes the document to the department
- **save** – saves the form
- **complete** – routes the document forward
- **cancel** – cancels the document and you will have to start over again

Printing your request

The E-Doc system archives your requests, so you don't have to print them out, but some of you may want or need to. The best way to do this is before submitting your request because the form will be more readable.

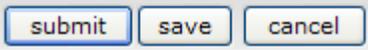
Follow these steps to print:

1. **Save** the edoc

2. **Print** the edoc using either the Internet Explorer print icon or by going to File >> Print
3. Click the **Submit** button after the form has successfully printed

Submitting Your Form

After you have entered all of the necessary information on the form, you will need to route the form.

These are the buttons at the bottom of the form: 

Click **submit**.

- **submit** – routes the document to the department
- **save** – saves the form
- **cancel** – cancels the document and you will have to start over again

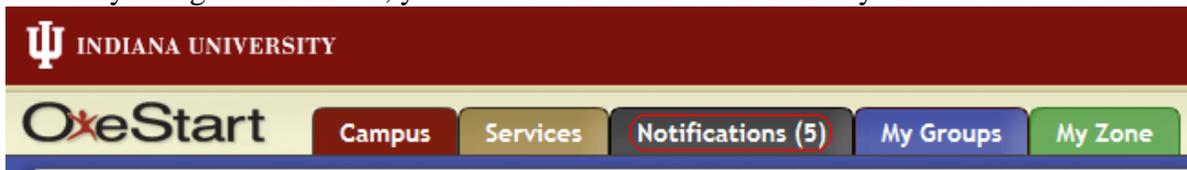
(Your form will time out if you have it open for too long, in this case you will want to save it. You do not have to save the form unless you think it will be open for longer than it will typically take to fill it out.)

After you have routed the form you might want to write down the **Document Id** for your records. You will be able to do a document search if you should forget to write down the id.

Approving a Submitted Request

There are two ways you will know you have a new request waiting for you in your action list: 1. You will have received an e-mail notification (this is based on how you set-up your action list preferences, see Setting Your Action List Preferences),

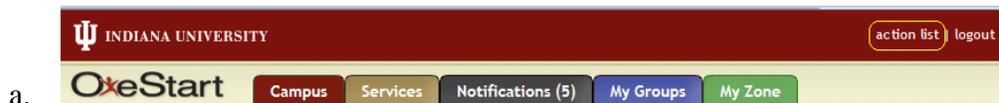
2. When you login to OneStart, you will see the number of items in your action list on the Notifications tab.



Accessing Your Action List

OneStart >> Action List

1. Login to OneStart
2. Click the **action list** link in OneStart. It's at the top right corner of OneStart.



3. Your action list will appear in the main screen of OneStart. Click on the **Document Id** of the request you would like to open first

| Document Id | Type | Title | Route Status | Action Requested | Initiator | Delegator | Date Created |
|-------------|--------------------------------|---|--------------|------------------|-----------------------|-----------|------------------------|
| 1220307 | UGS-PhDCommencementApplication | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | ENROUTE | APPROVE | Rigsby, Jennifer Y | | 03:41 PM 04/07/2010 |

Making A Decision

- After reviewing the form, you will be able to make one of the following decisions:

- approve:** will route the request forward to the next node for approval
 - disapprove:** will cancel the request, all previous approvers and the initiator will be notified of your decision to disapprove the request.
 - save:** saves any changes you have made to the application. You can close the document, it will stay in your action list, or keep it open while you continue to make changes.
 - returnToPrevious:** this comes with a drop down list. Select the node you want to return the request to before clicking the button.
- If you choose to disapprove or returnToPrevious, be sure to include a **Note** briefly explaining why. The notes will route on the form and can be read by anyone who opens the form, this is the best way to communicate to the initiator or an approver.

Routing the document to the student’s research chair

- The edoc will route to a person in your school or department that is designated to route it to the student’s Research Chair.
- Open the document.
- Under Program Information, the student will have selected your department in either the School/Department 1 section or School/Department 2 section for double majors.
 - Under the department is a question: “Route to Research Chair by network id?”
 - Select “yes” and enter the network id of the research chair. The network id is the person’s username which can be found in their email address. For example, my email is jyrigsby@indiana.edu, so my network id is: jyrigsby.

| Program Information | |
|--|--|
| School/Department 1 | Major 1 |
| BL - CLAS - Classical Studies | BL - Classical St:Latin&Greek PhD |
| Route to Research Chair by network ID? | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="text" value="mboots1"/> |
| Double Majors | |
| School/Department 2 | Major 2 |
| BL - AAAD - AfriAmer & Dias Studies | BL - Afr Am & Afr Diaspora St PHD |
| Route to Research Chair by network ID? | <input type="radio"/> Yes <input type="radio"/> No <input type="text"/> |

- Scroll to the bottom and click **approve**
- The document will route to the person with the network id that you entered.

The image below is the route log for the example that is pictured above, you can see that it routed to Matthew Boots whose network id is: mboots1:

Document Id: 1220867

| | | | |
|----------------|---|--|--|
| Document Title | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | | |
| Document Type | UGS-PhDCommencementApplication | | |
| Initiator | Jennifer Rigsby | | |
| Route Status | ENROUTE | | |
| Route Node(s) | UGS.PhDCommencement.Department1b | | |

Actions Taken

| | Action | Taken By | For Delegator | Time/Date |
|------------------------|-----------|---------------------------------|---------------|---------------------|
| | COMPLETED | Jennifer Rigsby | | 09:24 AM 04/28/2010 |
| ▶ show | APPROVED | Jody Smith | | 09:27 AM 04/28/2010 |
| ▶ show | FYI | Dana Ruddick | | 09:28 AM 04/28/2010 |
| ▶ show | APPROVED | Matthew Boots | | 09:29 AM 04/28/2010 |

Pending Action Requests

| | Action | Requested Of | Time/Date |
|------------------------|------------------------|--------------------------------------|---------------------|
| ▶ show | IN ACTION LIST APPROVE | UGS.BL.PhDComm.CLAS2 | 09:29 AM 04/28/2010 |

Returning to Previous (Returning to the Initiator or a Previous Approver)

You may find that you want the return the document to the student for some reason. Do not disapprove a request that you want to return to the student. Disapproving will cancel the document and the student will have to start over again.

When you have a document you want to return to the initiator or to a previous approver there are several steps you will need to follow:

1. Enter a note explaining what you need the person to do. (*Don't forget to save the note.)

| Create Note | | | |
|----------------|------------|---|-------------------------------------|
| Author | Date | Note | Action |
| David L Daleke | 08/27/2007 | <input type="text"/> Attachment: <input type="text"/> <input type="button" value="Browse..."/> | <input type="button" value="save"/> |

| View Notes | | | |
|----------------|------------------------|--------------------------------|---|
| Author | Date | Note | Action |
| David L Daleke | 08/27/2007 01:32 PM | You need to attach a syllabus. | <input type="button" value="edit"/> <input type="button" value="delete"/> |

2. Select the node you want to return the request to (for a complete explanation and list of the nodes, refer to the Nodes section.) The initiator node is the default.

| Author | Date | Note | Action |
|----------------|------------|---|-------------------------------------|
| Jessica Durnal | 04/09/2010 | <input type="text"/> Attachment: <input type="text"/> <input type="button" value="Browse..."/> | <input type="button" value="save"/> |

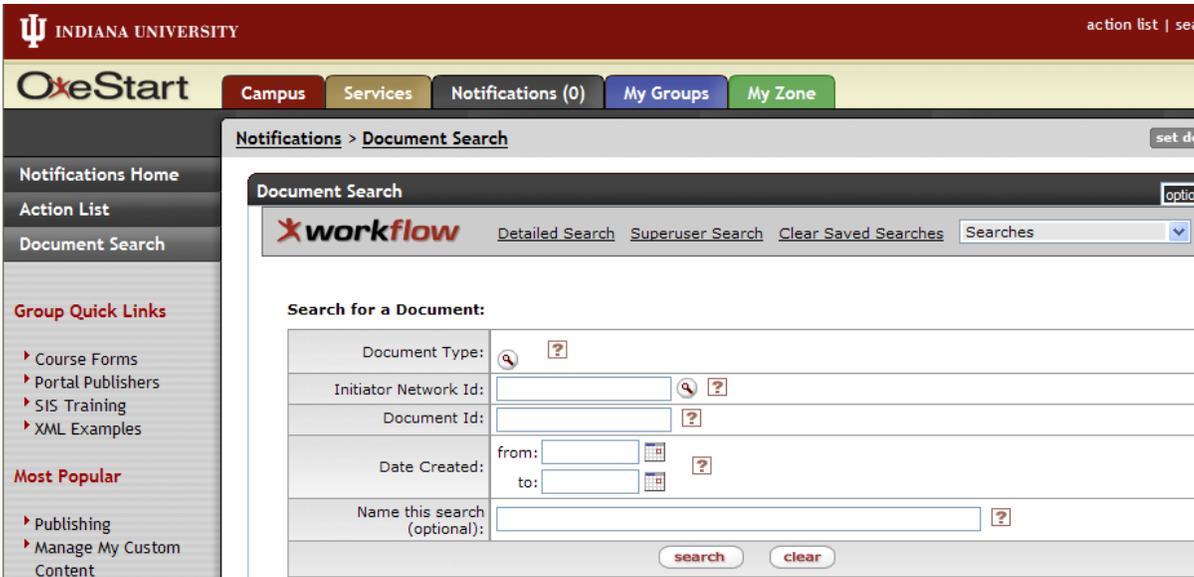
- Initiated
- UGS.PhDCommencement.UGSFYI
- UGS.PhDCommencement.Department1a
- UGS.PhDCommencement.Optional.NetId1a

- After you have selected the node you would like the document to route to, click the **returnToPrevious** button.
 
- Your document will route back to the node you selected.
- After the person at that node, in this example, the initiator, modifies their request they will resubmit it and it will go through the approval process again. If the document is routed back to a node that is not the first, it will only have to be approved again by those on the approval chain that follow that node, it will not go back to the beginning.

How to Do a Document Search

Notifications >> Document Search

The E-Doc system offers a simple Document Search. You can search by the initiator's Network Id, the Document Id, and the Date Created.



The screenshot shows the OxeStart interface for Document Search. The search form includes the following fields:

- Document Type: [text input]
- Initiator Network Id: [text input]
- Document Id: [text input]
- Date Created: from: [calendar picker] to: [calendar picker]
- Name this search (optional): [text input]

Buttons for 'search' and 'clear' are located at the bottom of the form.

- Click the **Notifications** tab.
- Click **Document Search** in the **Menu** on the left
- Type in the criteria you would like to search by
- Click the **search** button

Your results will be a list of all of the documents that meet the criteria you entered in the search screen.

How to do a Detailed Search

Frequently, you will want to do a search that is based on criteria specific to your document.

Search for a Document:

| | | | |
|------------------------------|----------------------------|---------------------------------------|--------------------------------------|
| Document Type: | <input type="text"/> | | |
| Initiator Network Id: | <input type="text"/> | | |
| Document Id: | <input type="text"/> | | |
| Date Created: | from: <input type="text"/> | | |
| | to: <input type="text"/> | | |
| Name this search (optional): | <input type="text"/> | | |
| | | <input type="button" value="search"/> | <input type="button" value="clear"/> |

Nothing found to display.

1. Click the spyglass in the **Document Type** field.
2. You will get a search screen like this:

| | | |
|-----------------------|---|--|
| Parent Document Type: | <input type="text"/> | |
| Document Type Name: | <input type="text"/> | |
| Document Type Label: | <input type="text"/> | |
| Document Type Id: | <input type="text"/> | |
| Active Indicator: | <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Show All | |
| | | <input type="button" value="search"/> <input type="button" value="clear"/> |

3. In the **Document Type Name** field type “phd”
4. Click **Search**
5. Your results will look like this:

| | | |
|-----------------------|---|--|
| Parent Document Type: | <input type="text"/> | |
| Climb Hierarchy: | <input type="radio"/> Yes <input checked="" type="radio"/> No | |
| Document Type Name: | <input type="text" value="phd"/> | |
| Document Type Label: | <input type="text"/> | |
| Document Type Id: | <input type="text"/> | |
| Active Indicator: | <input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Show All | |
| | | <input type="button" value="search"/> <input type="button" value="clear"/> |

2 items found, displaying all items.1

[return with no value](#)
[Export results to: XML](#)

| Document Type Id | Document Type Name | Document Type Parent | Document Type Label | Active Indicator | Action | Return value |
|------------------|-----------------------------------|-----------------------------------|----------------------------------|------------------|------------------------|------------------------------|
| 1219948 | UGS.PhDComm.WorkgroupTypeDoctype | UGS-PhDCommencement.ParentDoctype | UGS Workgroup Type Document Type | Active | report | return value |
| 1220204 | UGS-PhDCommencement.ParentDoctype | Root | UGS-PhDCommencementApplication | Active | report | return value |

6. Click **return value** on the row that says “Root” in the “Document Type Parent” field

[return with no value](#)
Export results to: [XML](#)

2 items found, displaying all items.1

| Document Type Id | Document Type Name | Document Type Parent | Document Type Label | Active Indicator | Action | Return value |
|------------------|-----------------------------------|-----------------------------------|----------------------------------|------------------|------------------------|------------------------------|
| 1219948 | UGS.PhDComm.WorkgroupTypeDoctype | UGS-PhDCommencement.ParentDoctype | UGS Workgroup Type Document Type | Active | report | return value |
| 1220204 | UGS-PhDCommencement.ParentDoctype | Root | UGS-PhDCommencementApplication | Active | report | return value |

7. Now the search you do will be based on all of the forms for the PhD Commencement Participation Application.
8. As you can see below, there are several new options for searching. If you choose to search by the student’s name, the search is case specific.
9. When you have entered and selected everything you want, click the **search** button.
10. Your results will look like this:

Search for a Document:

| | |
|------------------------------|---|
| Document Type: | UGS-PhDCommencementApplication ? |
| Initiator Network Id: | <input type="text"/> ? |
| Document Id: | <input type="text"/> ? |
| Date Created: | from: <input type="text"/> to: <input type="text"/> ? |
| Department/Program 1: | <input type="text"/> ▼ |
| Department/Program 2: | <input type="text"/> ▼ |
| University ID: | <input type="text"/> |
| First Name (case specific): | <input type="text"/> |
| Last Name (case specific): | <input type="text"/> |
| Commencement: | December Commencement ▼ |
| Commencement Year: | 2010 |
| Name this search (optional): | <input type="text"/> ? |

[search](#)

One item found.1

| Document Id | Type | Title | Route Status | Initiator | Date Created | Departm 1 |
|-------------------------|--------------------------------|---|--------------|------------------------------------|---------------------|-----------|
| 1220590 | UGS-PhDCommencementApplication | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | ENROUTE | Rigsby, Jennifer Y | 12:48 PM 04/14/2010 | BL-HPSC |

11. Click on the **Document Id** to open the form, click on the **Route Log** button to track its progress through the approval chain.

How to Determine Who Has Your Form in Their Action List

Notifications >> Document Search >> Route Log

Pull your document up using Document Search

1. Click the **Notifications** tab
2. Click **Document Search** in the **Menu** on the left
3. Type in the criteria you would like to search by
4. Click the **Search** button

Your results will look something like this:

Search for a Document:

| | | | |
|--|----------------------------|--|--|
| Document Type: | <input type="text"/> | | |
| Initiator Network Id: | <input type="text"/> | | |
| Document Id: | 1220287 | | |
| Date Created: | from: <input type="text"/> | | |
| | to: <input type="text"/> | | |
| Name this search (optional): | <input type="text"/> | | |
| <input type="button" value="search"/> <input type="button" value="clear"/> | | | |

One item found.1

| Document Id | Type | Title | Route Status | Initiator | Date Created | Route Log |
|-------------------------|----------------------------------|--|--------------|------------------------------------|---------------------|-----------|
| 1220287 | UGS Workgroup Type Document Type | Routing workgroup UGS.BL.PhDComm.CLAS1 | FINAL | Rigsby, Jennifer Y | 02:44 PM 04/07/2010 | |

Click the **Route Log** button

The Route Log will give you all kinds of useful information, including, the name of the workgroup that is currently responsible for approving the form.

Document Id: 1220294

| | | | |
|----------------|---|---------------|---------------------|
| Document Title | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | | |
| Document Type | UGS-PhDCommencementApplication | Created | 03:07 PM 04/07/2010 |
| Initiator | Jennifer Rigsby | Last Modified | 03:08 PM 04/07/2010 |
| Route Status | ENROUTE | Last Approved | |
| Route Node(s) | UGS.PhDCommencement.Department1b | Finalized | |

Actions Taken

| | Action | Taken By | For Delegator | Time/Date | Annotation |
|------------------------|-----------|-----------------|---------------|---------------------|------------|
| | COMPLETED | Jennifer Rigsby | | 03:07 PM 04/07/2010 | |
| ▶ show | APPROVED | Jody Smith | | 03:08 PM 04/07/2010 | |

Pending Action Requests

| | Action | Requested Of | Time/Date | Annotation |
|------------------------|----------------------------------|----------------------|---------------------|------------|
| ▶ show | IN ACTION LIST FYI | Dana Ruddick | 03:07 PM 04/07/2010 | |
| ▶ show | IN ACTION LIST APPROVE | UGS.BL.PhDComm.CLAS2 | 03:08 PM 04/07/2010 | |

If you would like to see who is in the workgroup, click the **workgroup name**.

| | |
|-----------------------------|---|
| Document Id: | 1220287  |
| Workgroup Id: | 1219517 |
| Workgroup Name: | UGS.BL.PhDComm.CLAS1 |
| Workgroup Type: | UGS.PhDComm |
| Workgroup Active Indicator: | Active |
| Workgroup Members: | Jody Smith (joesmith) |
| Workgroup Description: | testing departmental approval |

All levels of approval within the system have been set-up with workgroups, this allows the schools, departments, etc. to have a back-up if someone should take a vacation or an extended leave.

I have set the workgroups up like this:

All Schools, Departments, and entities associated with a campus begin with the campus abbreviation.

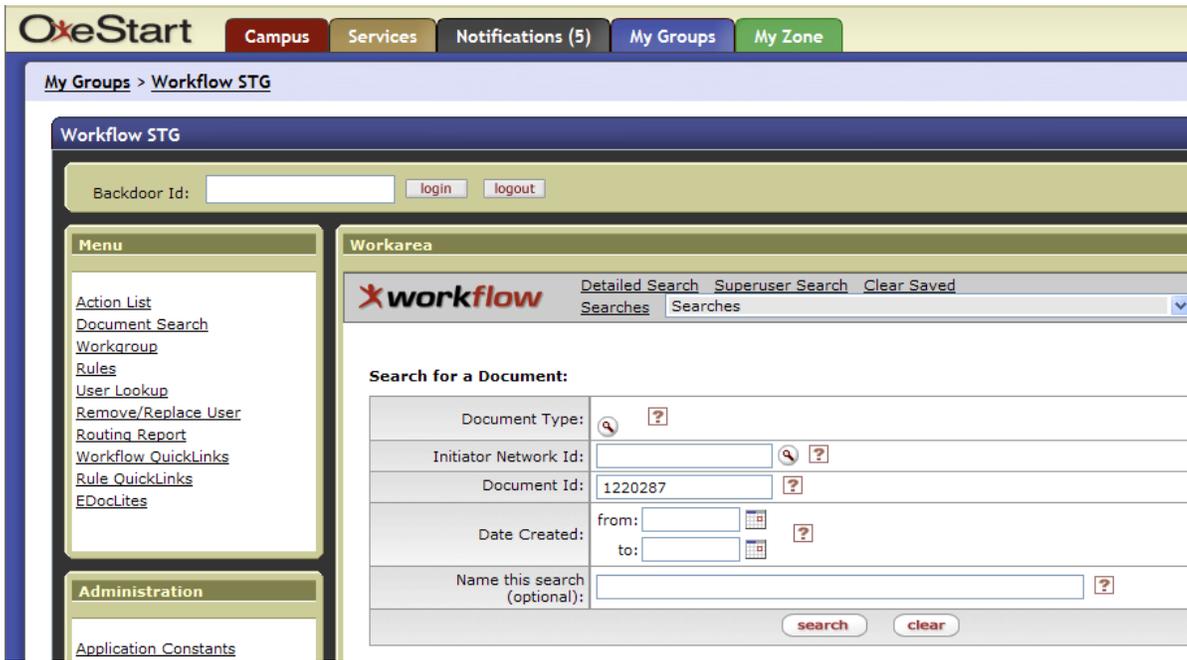
- UGS.BL.PhDComm.CLAS1
 - UGS – University Graduate School
 - BL – Bloomington
 - PhDComm – Ph.D. Commencement Participation Application
 - CLAS1 – Department or School.
 - If the document routes to two separate groups in the department, (this does not include the research chair) there will be a second workgroup like this:
 - UGS.BL.PhDComm.CLAS2
- The research chair will not have a workgroup associated with it since that is assigned after the request is routed to the department.

How to Determine Who Has Approved the Form

Unlike the paper document, which shows the signatures at the bottom of the form, the E-doc system does not.

Notifications >> Document Search >> Route Log

To look up the signatories on a form, you will need to do a document search.



1. Click the **Notifications** tab.
2. Click **Document Search** in the **Menu** on the left
3. Type in the criteria you would like to search by
4. Click the **Search** button

Your results will look something like this:

Search for a Document:

| | | | |
|--|----------------------------|--|--|
| Document Type: | <input type="text"/> | | |
| Initiator Network Id: | <input type="text"/> | | |
| Document Id: | 1220287 | | |
| Date Created: | from: <input type="text"/> | | |
| | to: <input type="text"/> | | |
| Name this search (optional): | <input type="text"/> | | |
| <input type="button" value="search"/> <input type="button" value="clear"/> | | | |

One item found.1

| <u>Document Id</u> | <u>Type</u> | <u>Title</u> | <u>Route Status</u> | <u>Initiator</u> | <u>Date Created</u> | <u>Route Log</u> |
|-------------------------|----------------------------------|--|---------------------|--------------------|---------------------|------------------|
| 1220287 | UGS Workgroup Type Document Type | Routing workgroup UGS.BL.PhDComm.CLAS1 | FINAL | Rigsby, Jennifer Y | 02:44 PM 04/07/2010 | |

Viewing the Signatories

Click the **Route Log** icon in the far right hand column.

Document Id: 1220294

| | | | |
|----------------|---|---------------|---------------------|
| Document Title | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | | |
| Document Type | UGS-PhDCommencementApplication | Created | 03:07 PM 04/07/2010 |
| Initiator | Jennifer Rigsby | Last Modified | 03:08 PM 04/07/2010 |
| Route Status | ENROUTE | Last Approved | |
| Route Node(s) | UGS.PhDCommencement.Department1b | Finalized | |

Actions Taken

| Action | Taken By | For Delegator | Time/Date | Annotation |
|-----------|-----------------|---------------|---------------------|------------|
| COMPLETED | Jennifer Rigsby | | 03:07 PM 04/07/2010 | |
| APPROVED | Jody Smith | | 03:08 PM 04/07/2010 | |

Pending Action Requests

| Action | Requested Of | Time/Date | Annotation |
|------------------------|----------------------|---------------------|------------|
| IN ACTION LIST FYI | Dana Ruddick | 03:07 PM 04/07/2010 | |
| IN ACTION LIST APPROVE | UGS.BL.PhDComm.CLAS2 | 03:08 PM 04/07/2010 | |

The route log will give you quite a bit of useful information. The header has:

1. Document Type
2. Initiator
3. Route Status, in this example is Enroute
4. The Route Node the document is currently at.
5. There are also useful dates listed

The route log itself is a grid:

1. **Action:** lists the action the signatory took on the document
2. **Taken By:** signatory
3. **For Delegator:** We won't be using the delegator functionality.
4. **Time/Date:** is the time and date the action was taken
5. **Annotation:** We won't be using this functionality.

To see detail in the route log you can click the **show** button.

Document Id: 1220294

| | | | |
|----------------|---|---------------|---------------------|
| Document Title | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | | |
| Document Type | UGS-PhDCommencementApplication | Created | 03:07 PM 04/07/2010 |
| Initiator | Jennifer Rigsby | Last Modified | 03:08 PM 04/07/2010 |
| Route Status | ENROUTE | Last Approved | |
| Route Node(s) | UGS.PhDCommencement.Department1b | Finalized | |

Actions Taken

| Action | Taken By | For Delegator | Time/Date | Annotation |
|-----------|-----------------|---------------|---------------------|------------|
| COMPLETED | Jennifer Rigsby | | 03:07 PM 04/07/2010 | |
| APPROVED | Jody Smith | | 03:08 PM 04/07/2010 | |

Pending Action Requests

| Action | Requested Of | Time/Date | Annotation |
|------------------------|----------------------|---------------------|------------|
| IN ACTION LIST FYI | Dana Ruddick | 03:07 PM 04/07/2010 | |
| IN ACTION LIST APPROVE | UGS.BL.PhDComm.CLAS2 | 03:08 PM 04/07/2010 | |

If you see that someone has signed off on the form, but you want to know more detail about that person, you can click the **show** button to the left. At the first level of detail you get the action they took, the Workgroup

they are in, and the time and date they took the action. If you still want to see further detail, click the **show** button to the left.

Document Id: 1220294

| | | | |
|----------------|---|---------------|---------------------|
| Document Title | Routing Document Type 'UGS-PhDCommencement.ParentDoctype' | | |
| Document Type | UGS-PhDCommencementApplication | Created | 03:07 PM 04/07/2010 |
| Initiator | Jennifer Rigsby | Last Modified | 03:08 PM 04/07/2010 |
| Route Status | ENROUTE | Last Approved | |
| Route Node(s) | UGS.PhDCommencement.Department1b | Finalized | |

Actions Taken

| Action | Taken By | For Delegator | Time/Date | Annotation |
|-----------|-----------------|---------------|---------------------|------------|
| COMPLETED | Jennifer Rigsby | | 03:07 PM 04/07/2010 | |
| APPROVED | Jody Smith | | 03:08 PM 04/07/2010 | |

Request Details

| Action | Requested Of | Time/Date | Annotation |
|--|----------------------|---------------------|------------|
| APPROVE | UGS.BL.PhDComm.CLAS1 | 03:07 PM 04/07/2010 | |
| Action Request Id: 2949738 | | | |
| Request Status: DONE | | | |
| Route Node: UGS.PhDCommencement.Department1a | | | |
| Responsibility Id: 95423 | | | |
| Routing Priority: 1 | | | |
| Responsibility: Classical Studies test rule | | | |
| Annotation: | | | |
| Rule: 412856 | | | |

Pending Action Requests

| Action | Requested Of | Time/Date | Annotation |
|------------------------|----------------------|---------------------|------------|
| IN ACTION LIST FYI | Dana Ruddick | 03:07 PM 04/07/2010 | |
| IN ACTION LIST APPROVE | UGS.BL.PhDComm.CLAS2 | 03:08 PM 04/07/2010 | |

This level of detail will tell you the name of the Route Node she signed off at and give you a description of the responsibility. Sometimes the Responsibility will be a short descriptive, and sometimes it will be an explanation of what the person is actually doing with the document before they approve it.

Nodes

Nodes determine the route path the request takes for approval.

The following is the list of nodes, in order, for the Ph.D. Commencement Participation Application:

1. UGS.PhDCommencement.UGSFYI – notification to the University Graduate School of form submission
2. UGS.PhDCommencement.Department1a – Departmental approval
3. UGS.PhDCommencement.Optional.NetId1a – Research Chair approval
4. UGS.PhDCommencement.Department1b – Additional departmental approval or notification

For Double Majors

5. *UGS.PhDCommencement.Department2a – Departmental approval*
6. *UGS.PhDCommencement.Optional.NetId2a – Research Chair approval*
7. *UGS.PhDCommencement.Department2b – Additional departmental approval or notification*
8. UGS.PhDCommencement.UGS – University Graduate School processing
9. UGS.PhDCommencement.InitiatorFYI – Notification to initiator that application has been processed

All submitted documents will route through the system in this order. Some departments or schools might not use all of the nodes. That is fine. The system will skip a node or nodes if there isn't a person or workgroup associated with it. The document routes based on the department the student selects. There are three nodes for the department, this is to accommodate departments that have multiple people process the

request (for example, all departments have one person review and approve the application. Sometimes a department will have a second person review and approve the request before it is sent to the University Graduate School.) Departments will only use all three nodes when they route the document to the student's research chair.