



# Approving an Appoint/Change Academic Adviser Workflow Request

---

## User Guide

A user guide for graduate program coordinators and managers for approving or denying a request submitted through the Appoint/Change Academic Adviser workflow.



# User Guide – Approving an Appoint/Change Academic Adviser Workflow Request

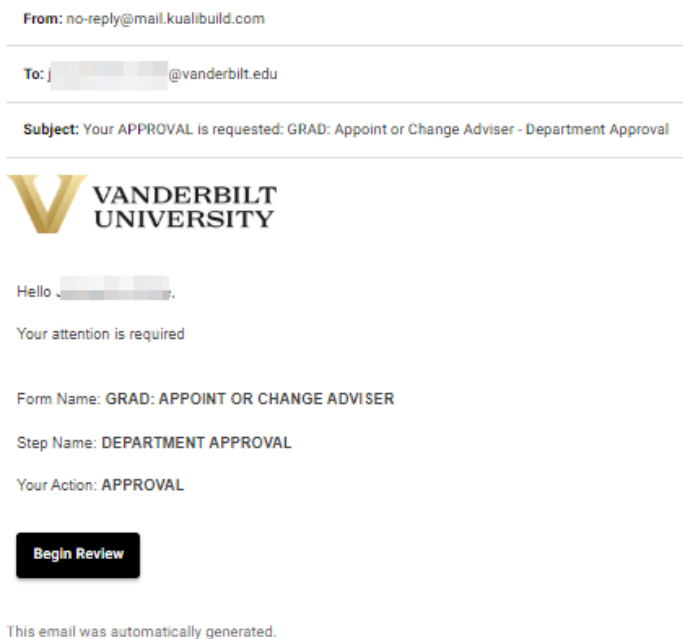
The Kualu workflow application has been implemented for graduate students to request to appoint or change their academic adviser. Graduate program coordinators and managers will utilize the Kualu workflow application to review appoint/change academic adviser workflow requests for their students. Students and administrators should refer to the Graduate School [catalog](#) for academic regulations.

## Contents

Reviewing the Appoint/Change Academic Adviser Workflow Request .....	3
Add an Adviser .....	4
Remove an Adviser.....	4
Add and Remove an Adviser .....	5
Approval Workflow/Timeline.....	5
Approving the Appoint/Change Academic Adviser Workflow Request.....	5
Denying the Appoint/Change Academic Adviser Workflow Request .....	5
Sending the Appoint/Change Academic Adviser Workflow Request Back .....	6
Accessing Your Work Queue .....	6
Accessing the Documents List.....	7

## Reviewing the Appoint/Change Academic Adviser Workflow Request

1. Once an Appoint/Change Academic Adviser Workflow request has been directed to you, you will receive an approval request via email. Click Begin Review on the approval request to access the form.



2. Information about the student appears in the Student Information section.

EMPLID *	VUnetID	First Name	Last Name
000: [redacted]	[redacted]	[redacted]	[redacted]

Select the appropriate discipline for this action:  
Environmental Engineering - PHD

## User Guide – Approving an Appoint/Change Academic Adviser Workflow Request

3. The Action section reflects the student’s choice of actions (Add an adviser, Remove an adviser, or Add and remove an adviser).

Action
I am requesting the following action be taken: *
Add an adviser.

### Add an Adviser

1. The selected adviser is reflected in the Add an Adviser section. **NOTE:** The adviser has already approved the request at this stage.

Add an Adviser	
Select an adviser to add by entering the first then last name of the adviser. *	VUnetID
<input type="text"/>	<input type="text"/>
	Email
	<input type="text"/> @vanderbilt.edu
	EMPLID
	000 <input type="text"/>

### Remove an Adviser

1. The selected adviser is reflected in the Remove an Adviser section.

Remove an Adviser	
Please remove this adviser from my record: *	VUnetID
<input type="text"/>	<input type="text"/>

## Add and Remove an Adviser

1. The selected advisers are reflected in the Remove an Adviser and Add an Adviser sections.

Remove an Adviser	
Please remove this adviser from my record: *	VUNetID
<input type="text"/>	<input type="text"/>

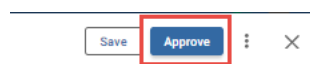
Add an Adviser	
Select an adviser to add by entering the first then last name of the adviser. *	VUNetID
<input type="text"/>	<input type="text"/>
	Email
	<input type="text"/> @vanderbilt.edu
	EMPLID
	000 <input type="text"/>

## Approval Workflow/Timeline

For requests to drop an adviser, the graduate program coordinator/manager is the first step in the Appoint/Change Academic Adviser workflow. Requests to add or add and remove an adviser route first to the adviser being added. Once the graduate program coordinator/manager approves a request, it routes to the Director of Graduate Studies and then to the Graduate School for final review and approvals. Upon final approval, the request routes to the Office of the University Registrar for processing.

## Approving the Appoint/Change Academic Adviser Workflow Request

1. Click Approve.



2. The request will now be routed to the Director of Graduate Studies.

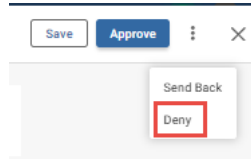
## Denying the Appoint/Change Academic Adviser Workflow Request

1. Add a comment in the Departmental Comments section. Comments here will be included in the denial notification email to the student.

Departmental Comments
Captured as part of the student's academic record. NOTE: For requests that are denied, comments entered here will be visible to the student in the denial notification email.

## User Guide – Approving an Appoint/Change Academic Adviser Workflow Request

2. Click Deny.

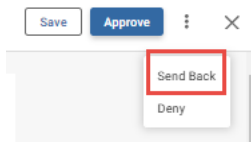


3. The student will be notified via email that the request has been denied.

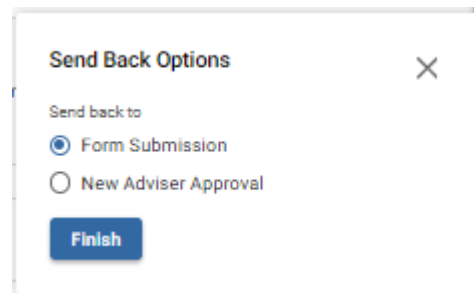
### **Sending the Appoint/Change Academic Adviser Workflow Request Back**

If, during the course of your review, you notice something that requires the student or the new adviser to change the request, you can send the request back.

1. Click Send Back.



2. Select Form Submission to return the request to the student or New Adviser Approval to return the request to the new adviser.



3. Click Finish. The student or adviser will be notified via email that the request has been sent back for additional action.

### **Accessing Your Work Queue**

In addition to clicking on the “Begin Review” button embedded in the notification emails, you can access your work queue at the following web address: <https://vanderbilt.kualibuild.com/>. Click Action List.

### Accessing the Documents List

To see a list of requests in your department, access the home screen at <https://vanderbilt.kualibuild.com/>. Click the GRAD: Appoint or Change Adviser tile and you will see a highly configurable listing of all submitted requests. By turning on and off “Columns” and using different filters, you can customize your experience with data elements you may find helpful.

1. To turn columns on and off, click Columns in the top row. A list of available fields will appear. Click on the eyeball icon to add or delete a column from your view.
2. To export data, click Export in the top row. You can select to export either what you see on your screen (Current View), or all available data (All Data).

**Please contact the YES Help Line at [yes@vanderbilt.edu](mailto:yes@vanderbilt.edu) or 615-343-4306 if you have questions or need additional assistance.**