



SAN DIEGO STATE  
UNIVERSITY

# Electronic Forms

Graduate Advisor User Guide

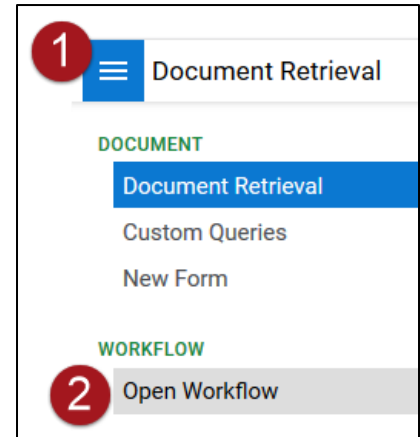
# QUICK START GUIDE TO PROCESSING FORMS

## Logging In

- Log in to OnBase (<https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx>) using your SDSU ID and password. You will be required to use Duo MFA to log in.

## Navigating to Workflow

- Log in using your SDSU ID and password, and Duo MFA
- Click on the menu icon in the top left corner (three horizontal lines)
- Click on Open Workflow
- Click on the arrow next to GRD-AP01 Graduate Form Approvals
- Click on AP01 Program to open your queue



## Processing Forms

- Click on a form to select it
- Complete the required fields in the program section
- Click **Save** – You can sign out and return to the form later to make changes, or proceed, if ready.
- Click on **Send to Grad Studies** at the bottom of the Inbox to forward to Graduate Studies

## Making Corrections

- Click on the form to select it
- Review the note from Graduate Studies by clicking on Notes at the bottom on the screen
- Click **Save** – this does not move the form out of your queue!
- Click on **Correction Complete** to return to Graduate Studies

## Cancelling Forms

- To cancel a form and have notification sent to student, click on a form to select it.
- Click on **Cancel Form**
- Select reason and click **Submit**

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# 1. Introduction

Graduate Studies uses an electronic form and workflow process using OnBase for many of the graduate student forms previously processed on paper.

As a Graduate Advisor, assigned program-level approver, or Department Chair, you can do the following using Hyland OnBase:

- View pending and completed Graduate Studies forms for students in your program.
- Initiate and submit forms on behalf of students in your program (for select forms only).
- Approve/Deny/Cancel/Process forms for students in your program.

## Support

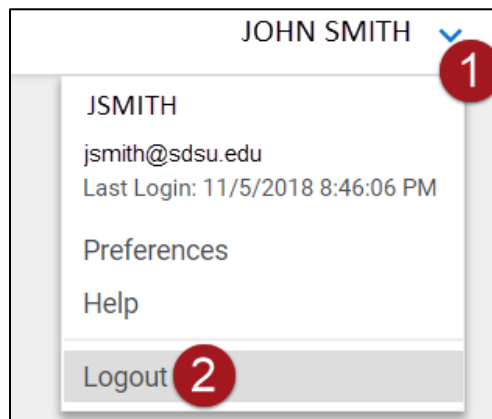
If you have any questions or suggestions, please contact Graduate Studies at [gra@sdsu.edu](mailto:gra@sdsu.edu) or 619-594-5213

## 2. Logging In

- To log in to your account, please navigate to <https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx> and log in using your SDSU ID and password.

The image shows the OnBase Foundation EP3 login interface. At the top left is the "OnBase® Foundation EP3" logo. On the right side, there are two input fields: the first is preceded by a person icon and contains the text "NAME@SDSU.EDU"; the second is preceded by a lock icon and contains a series of dots. Below these fields is a blue rectangular button with the word "Login" in white text.

- Your identity will be verified with multi-factor authentication (MFA) using Duo. For information about Duo, visit [https://it.sdsu.edu/security/operations-services/duo\\_getting\\_started](https://it.sdsu.edu/security/operations-services/duo_getting_started)
- To log out after your session, click on the blue arrow next to your name in the top right corner, and clicking on **Logout**.

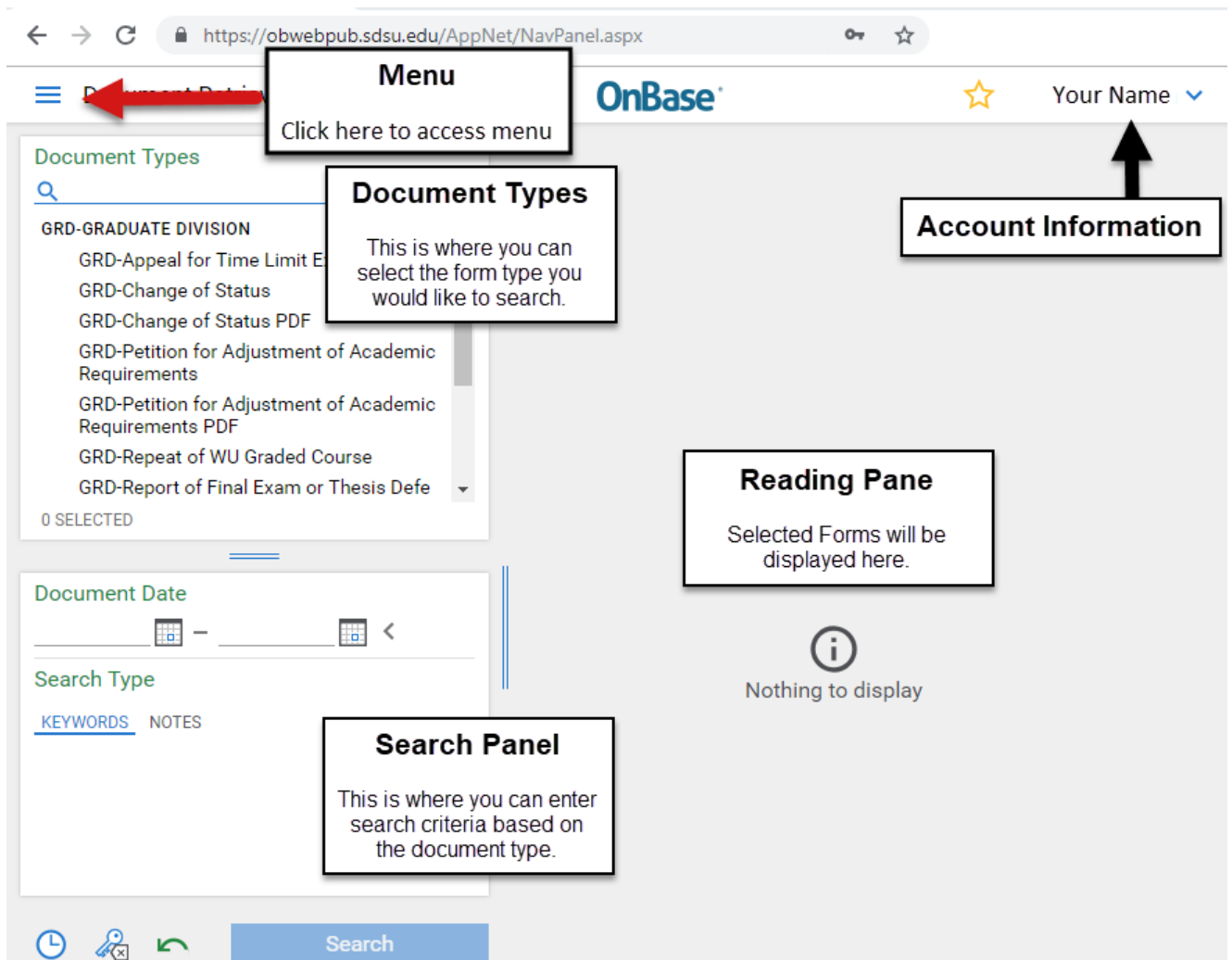


### 3. Notifications

- You will be notified about electronic forms pending your approval minutes after a student submits a form.
- The notification email will contain the [link](#) to log into Hyland OnBase, where you will be able to view, approve, deny, process, or cancel forms for students in your program.
- Twice weekly reminder emails will be sent if any forms are pending your approval or processing.
- If a form is not processed within two weeks, the Department Chair is notified and added as an approver to help facilitate the timely processing of forms.

## 4. Navigating OnBase

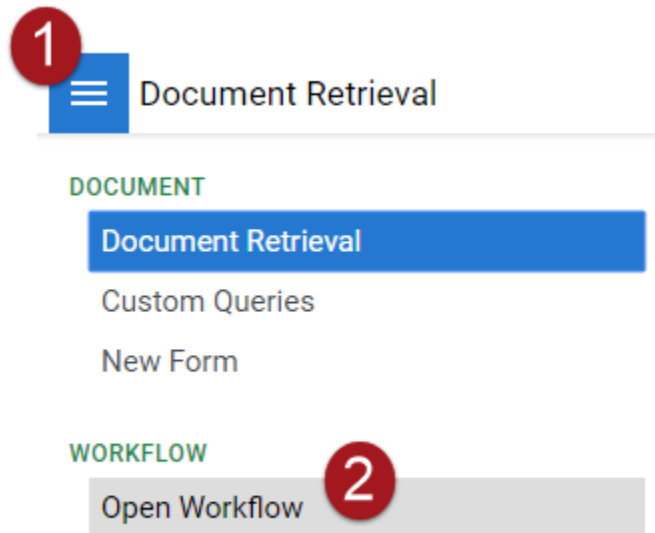
- The page below is the default view when you log in. From this page, you can search for and view documents (see section 7 for more details).
- For form processing and to submit new forms, you will need to access the Menu panel.



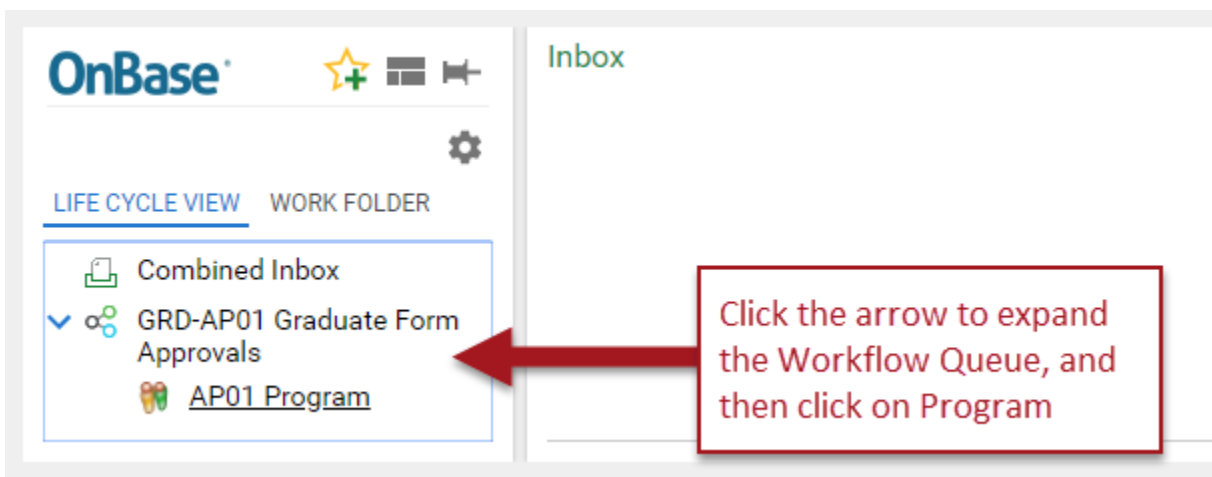
## 5. Approving/Processing Forms

### Accessing Program Workflow

- Open the Menu Panel and click on Open Workflow



- Workflow will open in a new window
- Click on the small arrow next to GRD-AP01 Graduate Form Approvals, and then click on AP01 Program. This is your approval queue.





## Selecting Form

- Forms pending approval/processing will be shown in the Inbox

OnBase

LIFE CYCLE VIEW WORK FOLDER

Combined Inbox

GRD-AP01 Graduate Form Approvals

AP01 Program

Inbox

Drag a column header here to group by that column.

DOCUMENT STATUS	REDID	FIRST NAME	LAST NAME	DOCUMENT TYPE
IN PROCESS	800100200	STEVE	ROGERS	VALIDATION FOR RECY
IN PROCESS	800200300	CAROL	DANVERS	REQUEST TO CHANGE MASTER'S PROGRAM
IN PROCESS	800100200	STEVE	ROGERS	REQUEST TO CHANGE MASTER'S PROGRAM

Send to Grad Affairs ☒ Cancel Form ☐

- Click on the form to open it

OnBase

LIFE CYCLE VIEW WORK FOLDER

Combined Inbox

GRD-AP01 Graduate Form Approvals

AP01 Program

Inbox

Drag a column header here to group by that column.

DOCUMENT STATUS	REDID	FIRST NAME	LAST NAME	DOCUMENT TYPE
IN PROCESS	800100200	STEVE	ROGERS	VALIDATION FOR RECY
IN PROCESS	800200300	CAROL	DANVERS	REQUEST TO CHANGE MASTER'S PROGRAM

Send to Grad Affairs ☒ Cancel Form ☐

### Validation for Recency

Selected form will open in this panel.

Student Information

Last Name: ROGERS First Name: STEVE SDSU ID: TEST@SDSU.EDU RedID: 800100200

Address: 555 MAIN ST

City: SAN DIEGO State: CA Zip Code: 92182

Preferred Phone Number: (619)555-1000 Email Address: CPTAMERICA@GMAIL.COM

Program: AEROSPACE ENGINEER Program Type: MASTERS Request Date: 02/08/2019

## Processing Form

- Complete the Program section of the form. Depending on the type of form, you may be required to Approve, Deny, or complete additional fields. Your name and the date will auto populate when you complete the form.
- Click on **Save** to save your changes to the form. You can return to the form later or complete the next step to send the form to Graduate Studies. Required fields will turn red and you will be unable to save until they are completed.

**Please note:** Clicking Save will *ONLY* save your changes – it will not move the form out of your queue and send it to Graduate Studies.

### Program Recommendations (Minimum required GPA for classification is 2.85)

Check One

- ☒ The above conditionally classified student has satisfactorily completed the conditions stated at the time of admission and is recommended for admission.
- ☐ The above conditionally classified student has not satisfactorily completed the conditions stated at the time of Admission. I recommend the student be conditionally classified. The revised conditions and deadline for completion are:

1

#### Revised Conditions

Revised Deadline for Completion Term

Revised Deadline for Completion Year

If the revised deadline **exceeds a year from admission** to the university, please provide a justification:

- ☐ The above student has not satisfactorily completed the conditions stated at the time of admission, and is recommended for dismissal.

Please provide an explanation

Graduate Advisor Signature

Your Name

Date

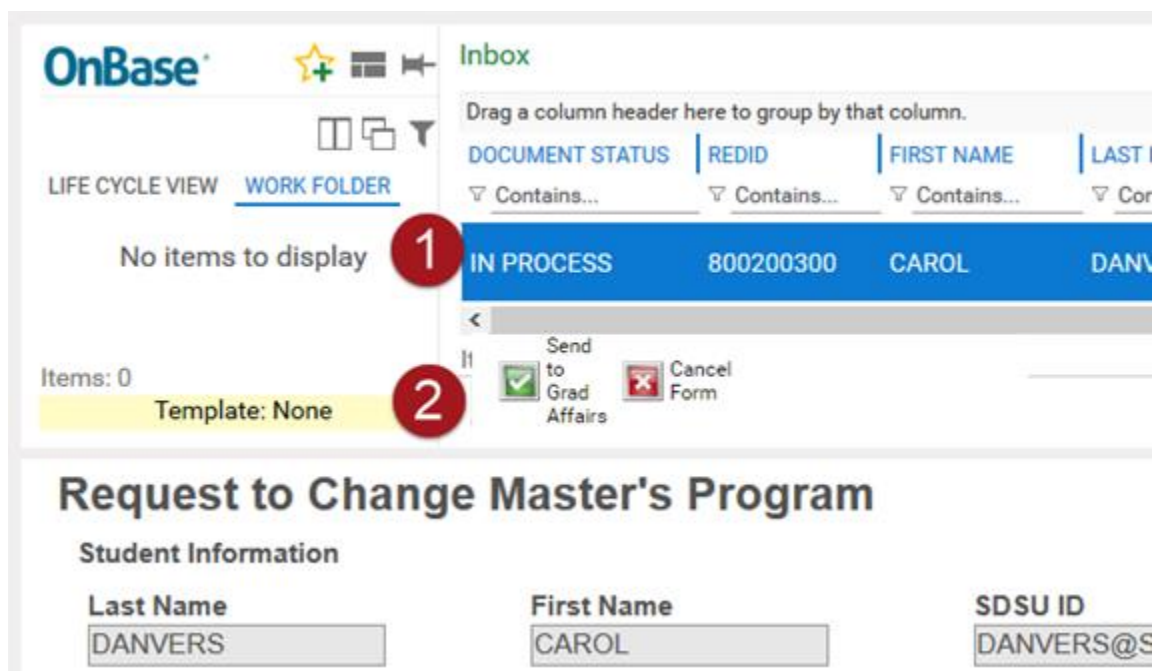
10/29/2018

Save

2

## Complete Processing – Send to Graduate Studies

- Select the form(s) that you have completed (you can select more than one at a time by holding CTRL and clicking the forms you have completed).
- Click on **Send to Grad Studies**



OnBase®

Inbox

Drag a column header here to group by that column.

DOCUMENT STATUS	REDID	FIRST NAME	LAST NAME
IN PROCESS	800200300	CAROL	DANVERS

Items: 0

Template: None

Send to Grad Affairs

Cancel Form

### Request to Change Master's Program

Student Information

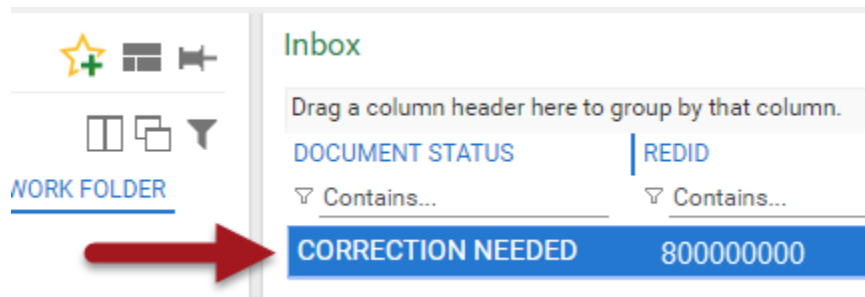
Last Name: DANVERS

First Name: CAROL

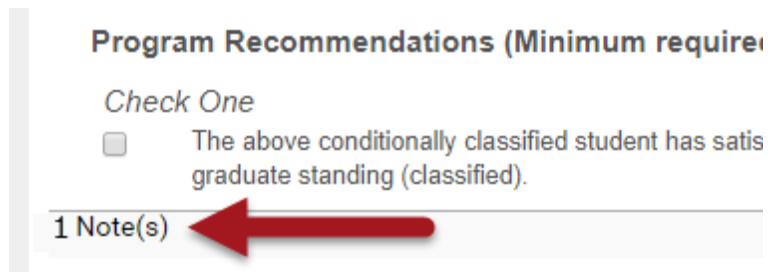
SDSU ID: DANVERS@S

## Making Corrections

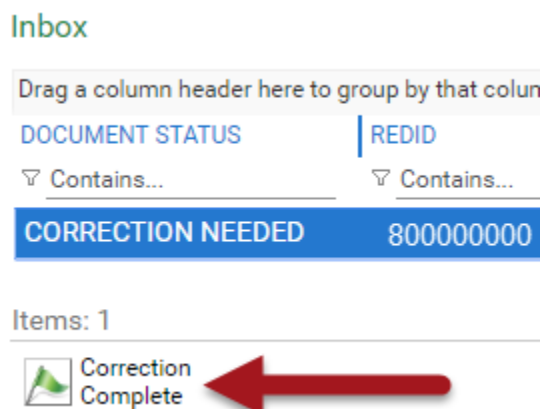
- In the event that Graduate Studies requests a correction on the form, the form will return to your Workflow Inbox with the Status **Correction Needed**.



- Select the form to open in the viewer, and check the note from Graduate Studies. The note can be accessed by clicking where it says **Note** at the bottom of the reading panel.



- Once you have made the correction, click Submit to Save, and click on Correction Complete to send back to Graduate Studies.



## Cancelling Forms


- In the case that you need to cancel a form, select the form from the Inbox and click on Cancel Form. This will result in the student receiving a notification that the form has been cancelled, and will advise them to contact you for further guidance.

DOCUMENT STATUS	REDID	FIRST NAME
Contains...	Contains...	Contains...
IN PROCESS	800200300	CAROL

<

Items: 11

☒ Processing Complete ☐ Cancel Form



- Confirm that you wish to cancel the form, select a reason from the drop down box, and click **Submit**.

Are you sure you want to remove this document from workflow?

1

Yes

No

Cancel

Please select your reason for cancelling the form: FORM NOT RELEVANT AT THIS TIME

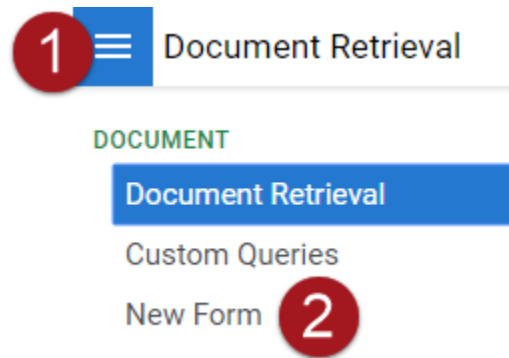
2

Submit

3

## 6. Submitting Forms for a Student

- To submit a form on a student's behalf, open the menu panel and click on New Form



- Click on the form you wish to initiate. We currently have 15 forms available in the system, though not all can be initiated by the program. Please refer to the table below.

Form	Who Can Initiate
Advancement to Candidacy (U.Achieve Programs Only)	Student or Program
Appeal for Time Limit Extension	Student or Program
Change of Status	Student or Program
Notification of Completion of Advanced Certificate Program	Student or Program
Petition for Adjustment of Academic Requirements (PAAR)	Student or Program
Petition to Repeat WU Graded Courses	Student or Program
Permission to Enter an Advanced Certificate Program	Student or Program
Validation for Recency	Student or Program
Withdrawal or Dismissal	Student or Program
Report of Foreign Language Completion	Student or Program
Report of Final Exam or Thesis Defense	Program Only
Request to Change Degree Objective (Clinical Psychology)	Program Only
Request to Change Degree Objective (School Psychology)	Program Only
Request for Letter of Completion	Student Only
Request to Change Master's Program	Student Only

New Form

OnBase

Your Name

Forms

GRD-GRADUATE DIVISION

- GRD-Appeal for Time Limit Extension
- GRD-Change of Status
- GRD-Petition for Adjustment of Academic Requirements
- GRD-Repeat of WU Graded Course
- GRD-Report of Final Exam or Thesis Defense
- GRD-Request for Letter of Completion
- GRD-Request for Permission to Enter an Adv Certificate
- GRD-Validation for Recency

Select a form.

- Type in the student's Red ID or SDSU ID, and click Tab or click your cursor into another box. The student's information will populate.

**Note:** If you have entered the incorrect student, click the Clear Student Data button, and try again.

## Change of Status

Student Information

Last Name First Name SDSU ID\* RedID

Enter RedID or SDSU ID.

Clear Student Data

- Complete the required fields for the student and the program sections, and click **Submit**.

**Please note:** If you submit a form on the student's behalf, you will also be completing the program section and sending it directly to Graduate Studies.

## 7. Viewing Forms

### Document Retrieval

- You can search for forms using form type, date range, and/or keywords (e.g., Red ID, SDSU ID, program, department, etc.)

The screenshot shows the 'Document Retrieval' interface. At the top, there is a blue header with a menu icon and the text 'Document Retrieval'. Below this, the 'Document Types' section is visible, featuring a search bar and a list of document types. A red arrow points to the 'GRD-Change of Status' option, which is marked with a blue checkmark. Below the list, it says '1 SELECTED'. The 'Document Date' section shows a date range from '10/1/2018' to '10/29/2018'. The 'Search Type' section has two tabs: 'KEYWORDS' (selected) and 'NOTES'. Below the tabs, there is a text input field for 'SDSU ID' and another for 'RedID'. A red arrow points to the 'Search by Date or Keyword' text. At the bottom, there is a blue 'Search' button.

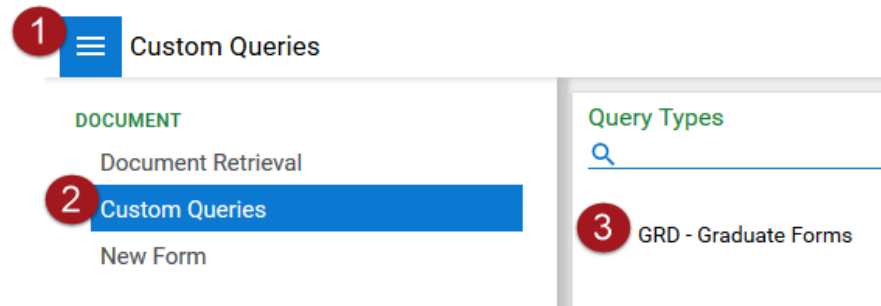
- Click on the form you wish to view, and it will be shown in the viewer.

Document Search Results	
Drag a column header here to group by that column.	
DOCUMENT NAME	
Contains...	
800200300: CAROL DANVERS - GRD-Petition for Adjustment of Academic Requirements - 2/8/2019	
800100300: TONY STARK - GRD-Petition for Adjustment of Academic Requirements - 2/8/2019	
800100200: STEVE ROGERS - GRD-Petition for Adjustment of Academic Requirements - 2/8/2019	



## Custom Queries

- You can also use the pre-configured Graduate Forms custom query to search for forms.
- Click on the Menu button and click on Custom Queries, and then click on Graduate Forms



- Use one or more of the pre-selected keyword searches and/or date range to find Graduate Studies forms.
- Click on the form you wish to view and it will be shown in the viewer.

DOCUMENT STATUS	REDID	FIRST NAME	LAST NAME	DOCUMENT TYPE	PROGRAM
Contains...	Contains...	Contains...	Contains...	Contains...	Contains...
IN PROCESS	800200300	CAROL	DANVERS	WITHDRAWAL OR DISMISSAL	HOMELAND SECURITY (MS)
IN PROCESS	800100200	STEVE	ROGERS	VALIDATION FOR REGENCY	AEROSPACE ENGINEERING (MS)
IN PROCESS	800200300	CAROL	DANVERS	REQUEST TO CHANGE MASTER'S PROGRAM	HOMELAND SECURITY (MS)
WITHDRAWN	800100300	TONY	STARK	REQUEST TO CHANGE MASTER'S PROGRAM	PHYSICS (MS)