



College of
Graduate Studies

OnBase Forms

Graduate Advisor User Guide

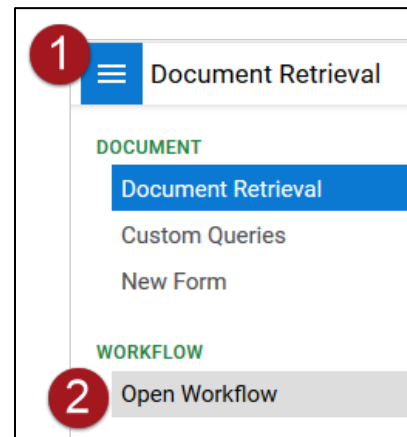
QUICK START GUIDE TO PROCESSING FORMS

Logging In

- Log in to OnBase by navigating to <https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx>
- **Note:** You must be logged in to your SDSU ID account in order to access OnBase.
- **Tip:** We recommend using Firefox or Chrome.

Navigating to Workflow

- 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** - Note: 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**

Contents

1. Introduction	4
Support	4
2. Logging In	5
3. Notifications	5
4. Navigating OnBase	6
5. Approving/Processing Forms	7
Accessing Program Workflow	7
Selecting Form	8
Processing Form	9
Complete Processing – Send to Graduate Studies	10
Making Corrections	11
Cancelling Forms	12
6. Submitting Forms for a Student	13
Submitting from OnBase	13
Submitting from my.SDSU	15
7. Viewing Forms	17
Document Retrieval	17
Custom Queries	18

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.

Email: gra@sdsu.edu

Telephone: 619-594-5213

2. Logging In

- To log in to OnBase, please navigate to <https://aisimgprdweb.sdsu.edu/AppNet/Login.aspx>
- Note:
 - You must be logged into your SDSU ID account in order to access OnBase.
 - We recommend using Firefox or Google Chrome.



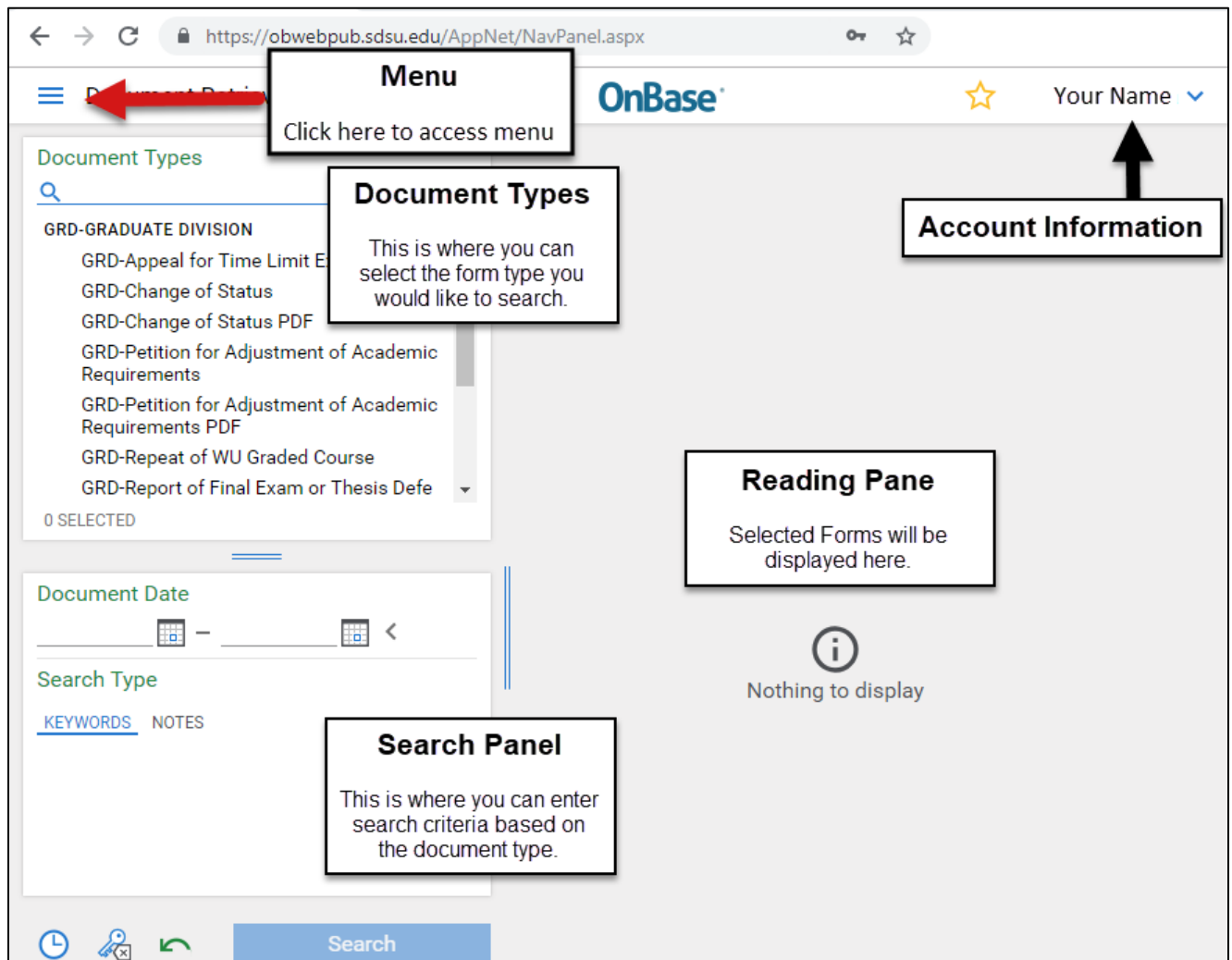
TIP: OnBase Forms work best when using Firefox or Chrome browsers.

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

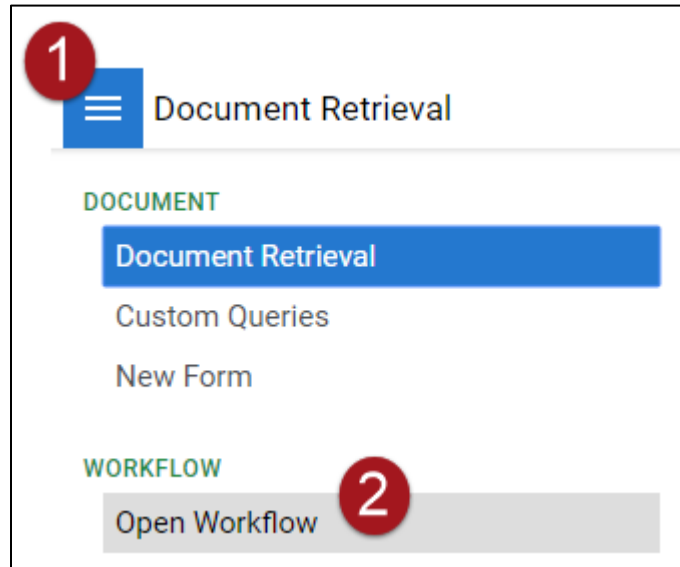
- The page below is the default view when you log in. From this page, you can search for and view documents (see section 7 for more details).
- For form processing and to submit new forms, you will need to access the Menu panel.



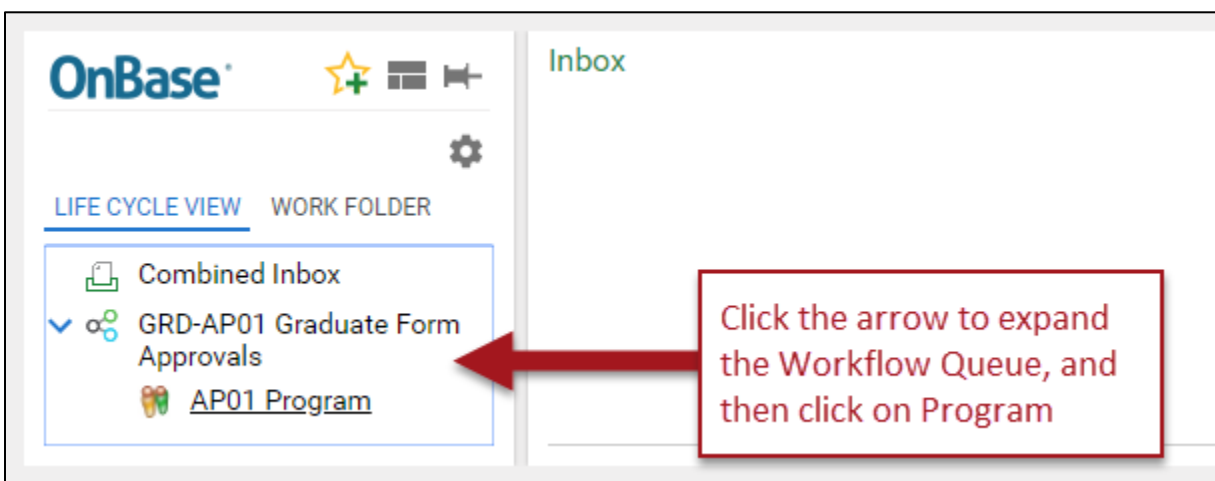
5. Approving/Processing Forms

Accessing Program Workflow

- Open the Menu Panel and click on Open Workflow

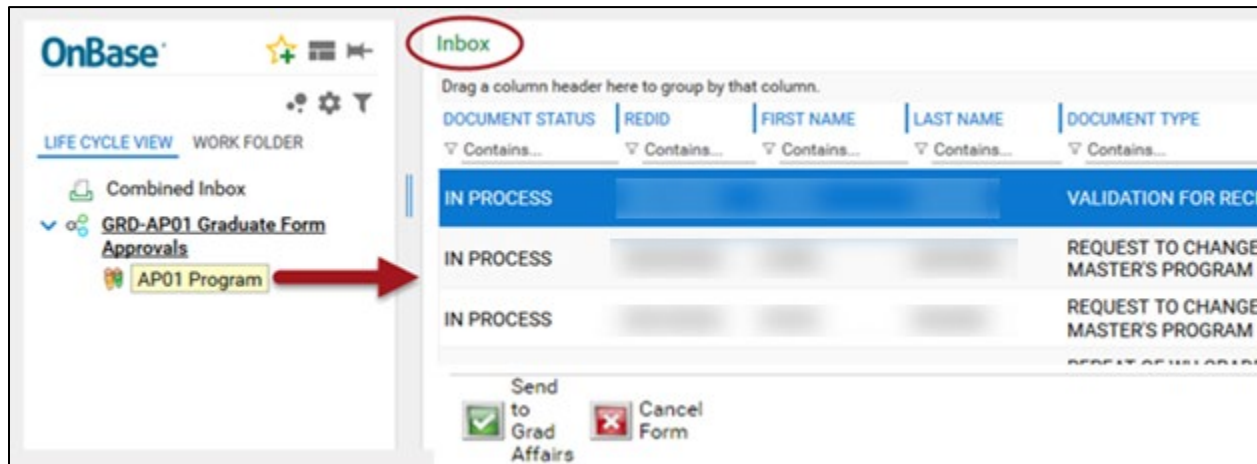


- Workflow will open in a new window
- Click on the small arrow next to GRD-AP01 Graduate Form Approvals, and then click on AP01 Program. This is your approval queue.



Selecting Form

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



- Click on the form to open it

Validation for Recency

Selected form will open in this panel.

Student Information

Last Name First Name SDSU ID RedID

Address

City State Zip Code

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, email address, 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.



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 3.00)

Check One

☐ The above conditionally classified student has satisfactorily completed the conditions stated at the time of admission.

☐ The above conditionally classified student has **not** satisfactorily completed the conditions stated at the time of Admission. The revised conditions and deadline for completion are: (250 character limit)

1

Revised Conditions

Revised Deadline for Completion Term

Revised Deadline for Completion Year

Graduate Advisor Signature

Date

Email

Note: Remember to **Save**, then click the "**Send to Grad Studies**" button to send form to Graduate Studies

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**

The screenshot shows the OnBase interface. On the left, the navigation pane includes 'Life Cycle View' and 'Work Folder'. Under 'GRD-AP01 Graduate Form Approvals', there is a sub-item 'AP01 Program (1)'. The main area displays an 'Inbox' with a table of documents. The table has columns for 'Document Date', 'Document Status', and 'RedID'. A document with the date '1/17/2024' and status 'IN PROCESS' is highlighted. Below the table, a context menu is open, showing options: 'Send to College of Graduate Studies' (with a green checkmark icon) and 'Cancel Form' (with a red X icon). Red circles with numbers 1 and 2 are overlaid on the image to indicate the steps: 1 points to the 'IN PROCESS' status, and 2 points to the 'Send to College of Graduate Studies' button.

Document Date	Document Status	RedID
1/17/2024	IN PROCESS	

Items: 1

Send to College of Graduate Studies

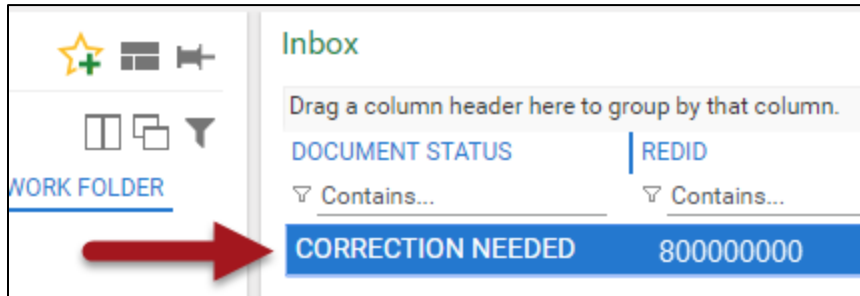
Cancel Form

Change of Status

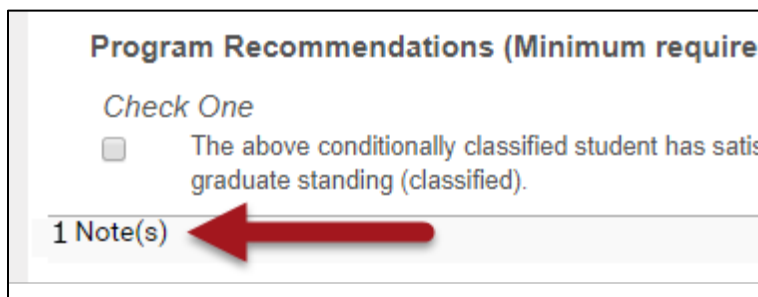
Student Information

Making Corrections

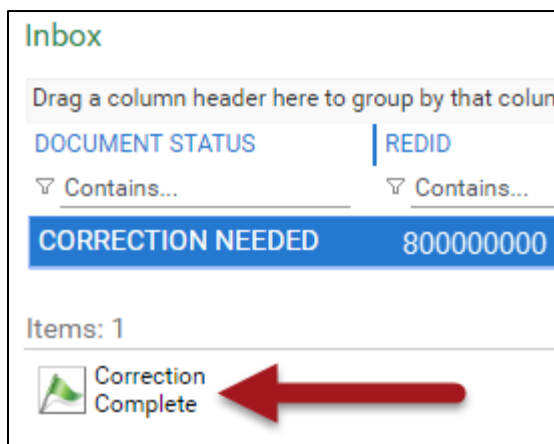
- In the event that Graduate Studies requests a correction on the form, the form will return to your Workflow Inbox with the Status **Correction Needed**.



- 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

Please select your reason for cancelling the form: 2

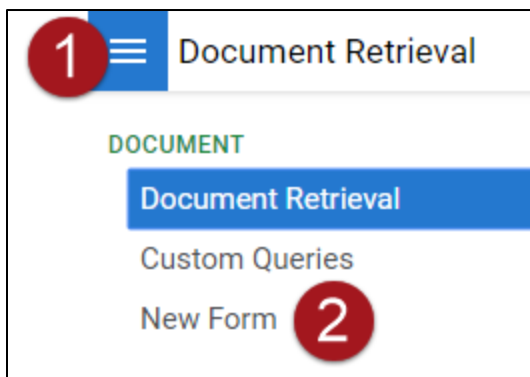
3

6. Submitting Forms for a Student

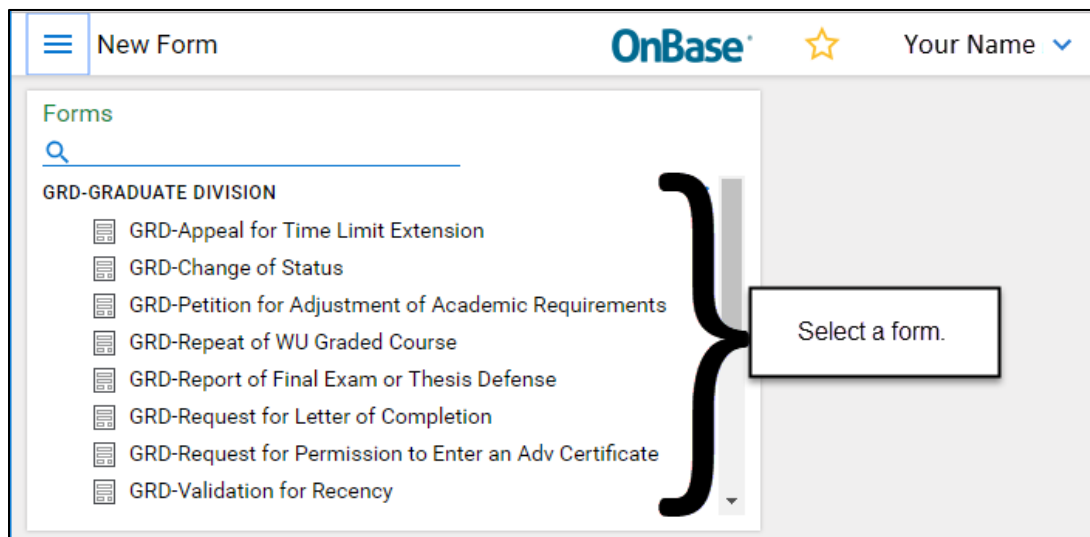
- Forms can be submitted on the student's behalf from within OnBase or directly from my.SDSU.
- Please refer to the [Graduate Studies Forms](#) webpage for details about which forms are available and can be initiated as an Advisor.

Submitting from OnBase

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



- Click on the form you wish to initiate.



- Type in the student's (old) Red ID, (new) EMPL ID, or SDSU ID (SDSU email address), 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.

Student Information

Request Date

SDSU ID *

Enter SDSU ID (email), RedID, or EmplID.

Email Address

Last Name

First Name

(New) EmplID


(Old) RedID

Program

Academic Plan

Clear Student Data

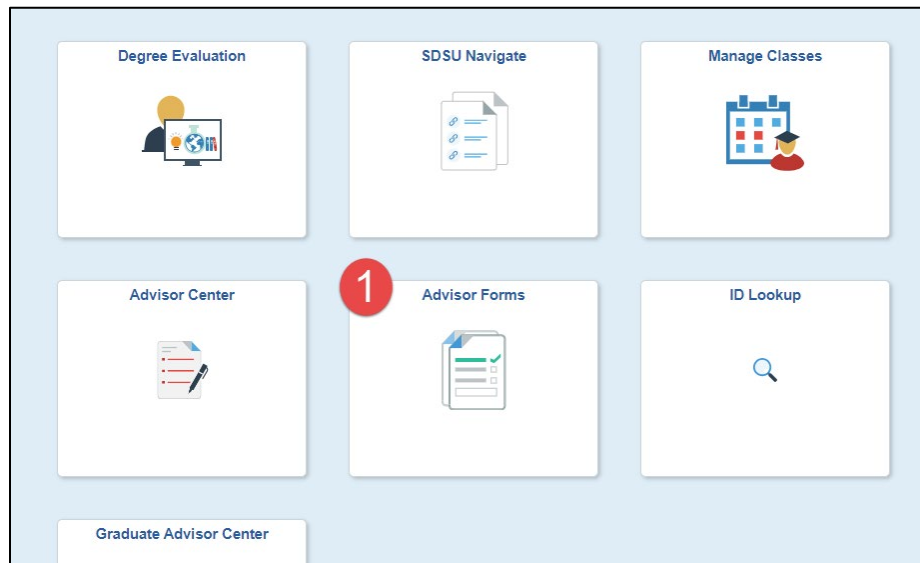
- Complete the required fields for the student and the program sections, and click **Submit**.



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.

Submitting from my.SDSU

- To submit a form on a student's behalf from within my.SDSU, click on Advisor Forms tile on the homepage.



- Next, select the desired form from the list.

Advisor Unity Forms	
Advisor Unity Forms Group	2
Graduate Advisors - Advancement to Candidacy Request	
Graduate Advisors - Appeal for Time Limit Extension	
Graduate Advisors - Request to Change Degree Objective (Clinical Psychology)	
Graduate Advisors - Request to Change Degree Objective (School Psychology)	
Graduate Advisors - Change of Status	
Graduate Advisors - Notification of Completion of Advanced Certificate Program	
Graduate Advisors - Permission to Enter an Advanced Certificate Program	
Graduate Advisors - FCB Change of Concentration	
Graduate Advisors - Report of Foreign Language Completion	
Graduate Advisors - Petition for Adjustment of Academic Requirements	
Graduate Advisors - Repeat of WU Graded Course	
Graduate Advisors - Report of Final Exam or Thesis Defense	
Graduate Advisors - Validation for Recency	
Graduate Advisors - Withdrawal or Dismissal	

- Type in the student's (old) Red ID, (new) EMPL ID, or SDSU ID (SDSU email address), 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.

Student Information

Request Date

SDSU ID*

Enter SDSU ID (email), RedID, or EmplID.

Email Address

Last Name

First Name

(New) EmplID

(Old) RedID

Program

Academic Plan

Clear Student Data

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



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, EMPL ID, SDSU ID email, program, department, etc.)

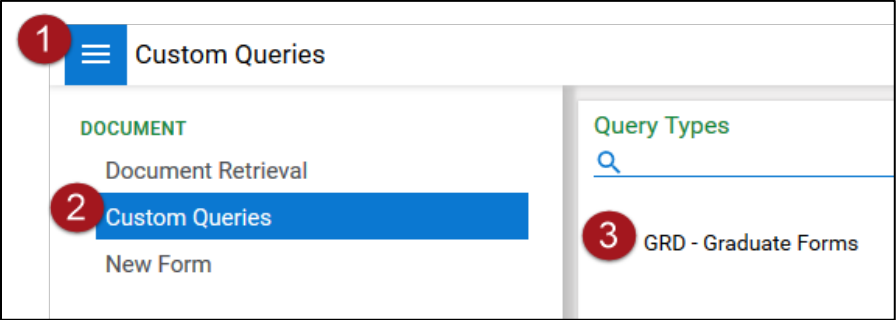
The screenshot shows the 'Document Retrieval' interface. At the top, there's a 'Document Types' section with a search bar and a list of form types. A red arrow points to the 'GRD-Change of Status' option, which is selected. Below this is the 'Document Date' section with a date range from 10/1/2018 to 10/29/2018. The 'Search Type' section has tabs for 'KEYWORDS' and 'NOTES'. A red arrow points to the 'KEYWORDS' tab, which contains the text 'SDSU ID' and 'RedID'. A 'Search' button is at the bottom right.

- 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...	
- GRD-Petition for Adjustment of Academic Requirements - 2/8/2019	
- GRD-Petition for Adjustment of Academic Requirements - 2/8/2019	
- 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				WITHDRAWAL OR DISMISSAL	HOMELAND SECURITY (MS)
IN PROCESS				VALIDATION FOR RECENCY	AEROSPACE ENGINEERING (MS)
IN PROCESS				REQUEST TO CHANGE MASTER'S PROGRAM	HOMELAND SECURITY (MS)