Graduate Advisor E-forms User Guide

QUICK START GUIDE

Activating Account

- Log in to OnBase (https://obwebpub.sdsu.edu/AppNet/Login.aspx) using the letters “ID” as the domain, and your SDSU ID (without @sdsu.edu) and your SDSU ID password and then Log Out.

Navigating to Workflow

- Log in using your SDSU ID (*no @sdsu.edu) and password
- 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 – this does not move the form out of your queue!
- Click on Send to Grad Affairs at the bottom of the Inbox to forward to Graduate Affairs

Making Corrections

- Click on the form to select it
- Review the note from Graduate Affairs by clicking on Notes at the bottom on the screen
- Click Save
- Click on Correction Complete to return to Graduate Affairs

Cancelling Forms

- To cancel a form and have notification sent to student, click on a form to select it.
- Click on Cancel
## Contents

1. Introduction ................................................................................................................................................... 3
   Support................................................................................................................................................................. 3
2. Account Activation ...................................................................................................................................... 4
3. Notifications................................................................................................................................................... 5
4. Logging In....................................................................................................................................................... 6
5. Navigating OnBase ..................................................................................................................................... 7
6. Approving/Processing Forms ................................................................................................................. 8
   Accessing Program Workflow .................................................................................................................... 8
   Selecting Form .................................................................................................................................................. 8
   Processing Form .............................................................................................................................................10
   Complete Processing – Send to Graduate Affairs ...........................................................................11
   Making Corrections.......................................................................................................................................12
   Cancelling Forms............................................................................................................................................13
7. Initiating Forms on Student’s Behalf.................................................................................................14
8. Document Retrieval – Searching for Forms ...................................................................................16
1. Introduction

Graduate Affairs is pleased to announce the launch of an electronic form and workflow process for many of the graduate student forms currently processed on paper.

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

- View pending and completed Graduate Affairs 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

We appreciate your patience and feedback as we roll out this new process. If you have any questions or suggestions, please contact Graduate Affairs at gra@sdsu.edu or 619-594-5213
2. Account Activation

- To activate your account, please navigate to https://obwebpub.sdsu.edu/AppNet/Login.aspx and log in using your SDSU ID and password.
- Type the word “ID” in the top box (Domain)
- Do not include@sdsu.edu in your username.

*Note: You will not receive notifications until you activate your account.*

- Please log out after activating your account by clicking 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 via a daily email sent at 4 PM.
- 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.
- 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.

Sample of Notification Email

Reminder: Forms Pending Approval in Hyland OnBase

gra@sdsu.edu

This is a daily notification that you have forms pending program approval in Hyland OnBase. Please log in to your OnBase account to review and approve forms assigned to you as soon as possible. If you approve, the form(s) will then be forwarded to Graduate Affairs.


Sincerely,
The Graduate Affairs Staff
619-594-5213 | gra@sdsu.edu
4. Logging In

- Just as you did to activate your account, you will navigate to https://obwebpub.sdsu.edu/AppNet/Login.aspx and log in using your SDSU ID and password.
- The top box (domain) should say “ID”
- Do not include @sdsu.edu in your username.
5. 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.

![OnBase Page Screenshot]

- **Document Types**: This is where you can select the form type you would like to search.
- **Search Panel**: This is where you can enter search criteria based on the document type.
- **Reading Pane**: Selected Forms will be displayed here.
- **Account Information**: Your Name
- **Menu**: Click here to access menu
6. 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

Click the arrow to expand the Workflow Queue, and then click on Program
• Forms pending approval/processing will be shown in the Inbox

• Click on the form to open it
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 before submitting the form. Required fields will turn red and you will be unable to Send to Grad Affairs 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 Affairs.
Complete Processing – Send to Graduate Affairs

- 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 Affairs**
Making Corrections

- In the event that Graduate Affairs 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 Affairs. 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 Affairs.
Cancelling Forms

- In the case that you need to cancel a form, select the form from the Inbox and click on Remove from Workflow. 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.
7. Initiating Forms on Student’s Behalf

- To initiate 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 twelve forms available in the system, and not all can be initiated by the program. Please refer to the table below.

<table>
<thead>
<tr>
<th>Form</th>
<th>Who Can Initiate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Petition for Adjustment of Academic Requirements</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Report of Final Examination or Thesis Defense for Master's Degree</td>
<td>Program only</td>
</tr>
<tr>
<td>Request for Letter of Completion</td>
<td>Student only</td>
</tr>
<tr>
<td>Change of Status</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Withdrawal or Dismissal</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Appeal for Time Limit Extension</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Validation for Recency</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Repeat of WU Grade Course</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Advancement to Candidacy</td>
<td>Program only</td>
</tr>
<tr>
<td>Request to Change Master’s Programs</td>
<td>Student only</td>
</tr>
<tr>
<td>Permission to Enter an Advanced Certificate</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Notification of Completion of Advanced Certificate Program</td>
<td>Student or Program</td>
</tr>
<tr>
<td>Report of Foreign Language Completion</td>
<td>Student or Program</td>
</tr>
</tbody>
</table>
• 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.

• 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 Affairs.
8. Document Retrieval – Searching for Forms

- You can search for forms using form type, date range, and/or keywords (e.g., Red ID, SDSU ID, program, department, etc.)
Click on the form you wish to view, and it will be shown in the viewer.

<table>
<thead>
<tr>
<th>RED ID: FIRST LAST - FORM TYPE - DATE SUBMITTED</th>
<th>DOCUMENT DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>8000000000: JONATHAN JOHNSON - GRD-Repeat of WU Graded Course - 10/25/2018</td>
<td>10/25/2018</td>
</tr>
<tr>
<td>8000000001: MARIA ANTOINETTE - GRD-Request for Letter of Completion - 10/24/2018</td>
<td>10/24/2018</td>
</tr>
</tbody>
</table>