



# SAN DIEGO STATE UNIVERSITY

## 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**

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# 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.

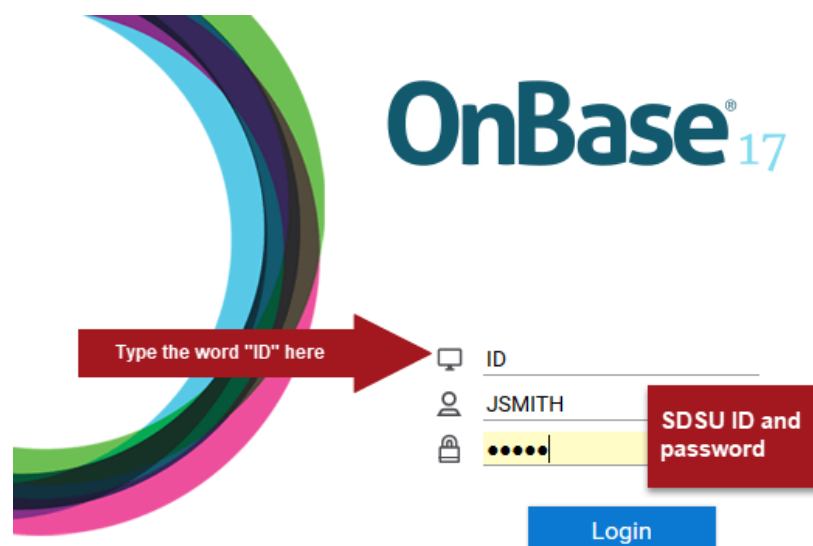
## Support

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](mailto:gra@sdsu.edu) or 619-594-5213

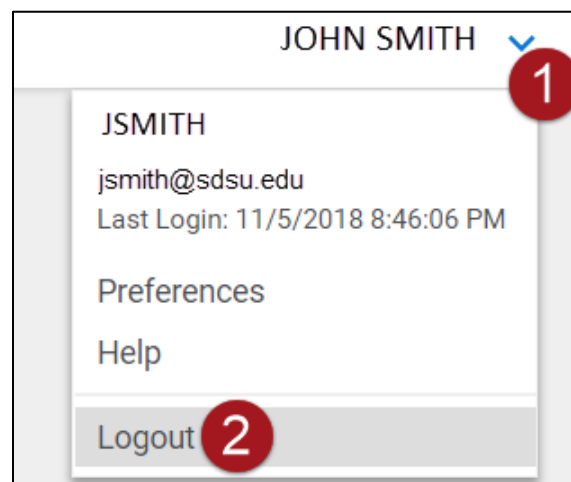
## 2. Account Activation

- 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.



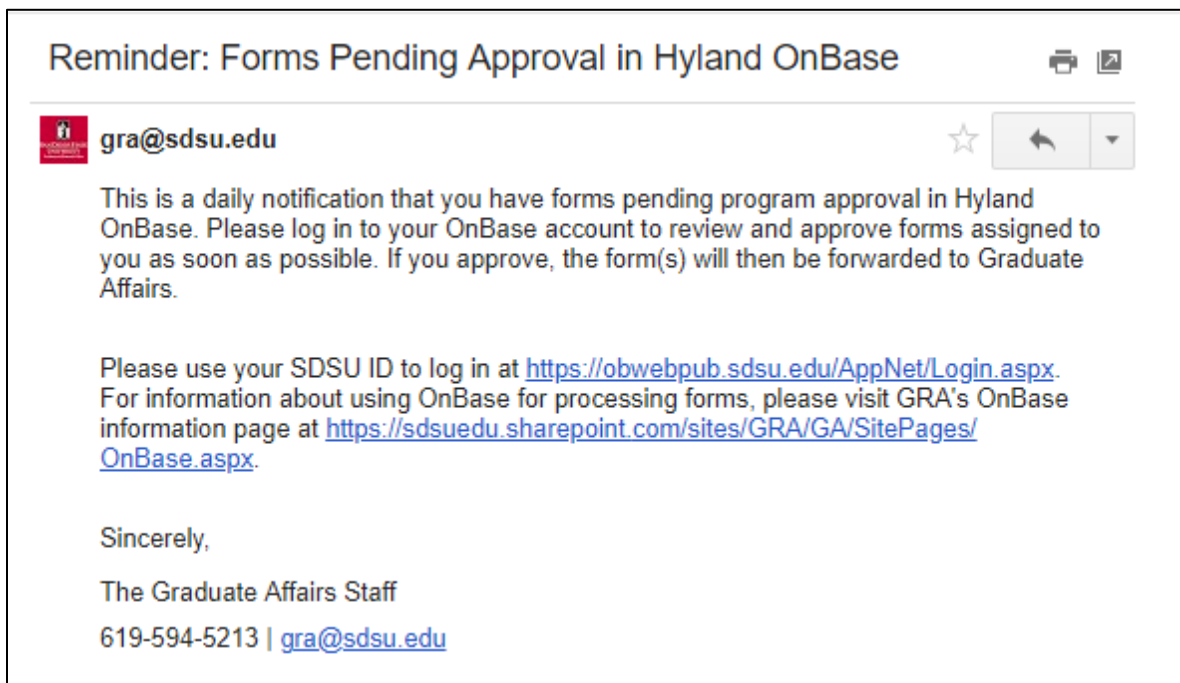
- Please log out after activating your account by clicking on the blue arrow next to your name in the top right corner, and clicking on **Logout**.



### 3. Notifications

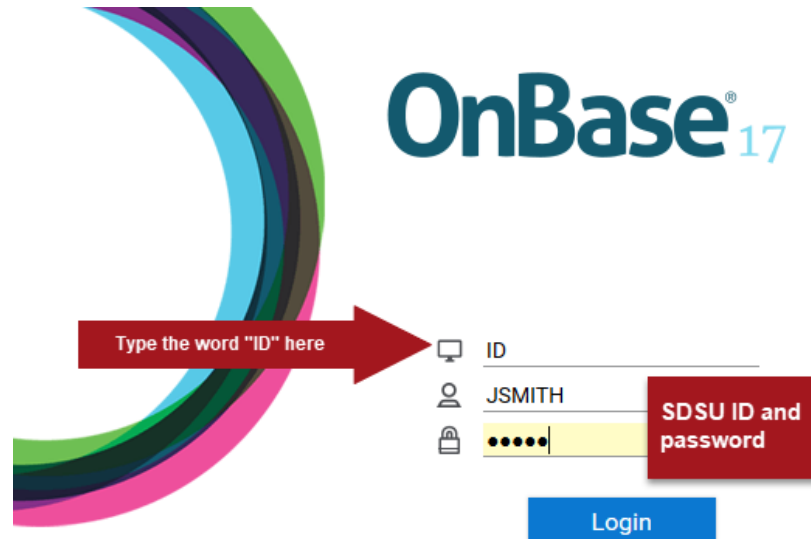
- You will be notified about electronic forms pending your approval via a daily email sent at 4 PM.
- The notification email will contain the [link](#) to log into Hyland OnBase, where you will be able to view, approve, deny, process, or cancel forms for students in your program.
- If a form is not processed 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



## 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.

The screenshot shows the OnBase web application interface. The browser address bar displays <https://obwebpub.sdsu.edu/AppNet/NavPanel.aspx>. The interface includes a navigation menu (indicated by a red arrow and a callout box), a document type selection list (with a callout box), a search panel (with a callout box), and an account information dropdown (with a callout box). The main content area is currently empty, displaying "Nothing to display" (with a callout box).

**Menu**  
Click here to access menu

**Document Types**  
This is where you can select the form type you would like to search.

**Account Information**

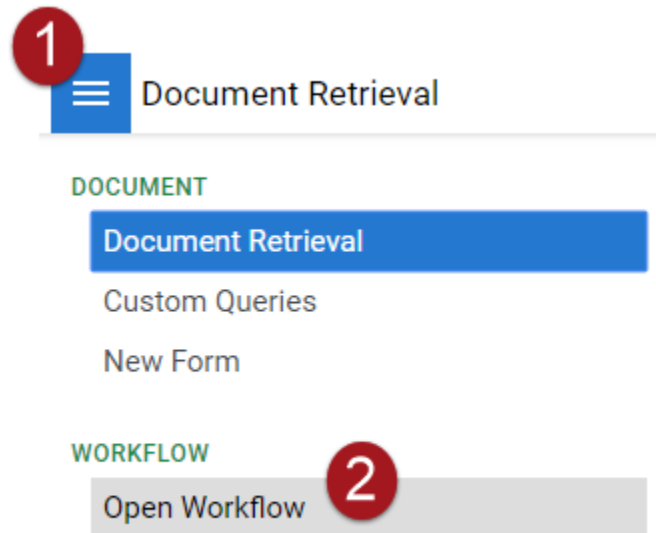
**Reading Pane**  
Selected Forms will be displayed here.

**Search Panel**  
This is where you can enter search criteria based on the document type.

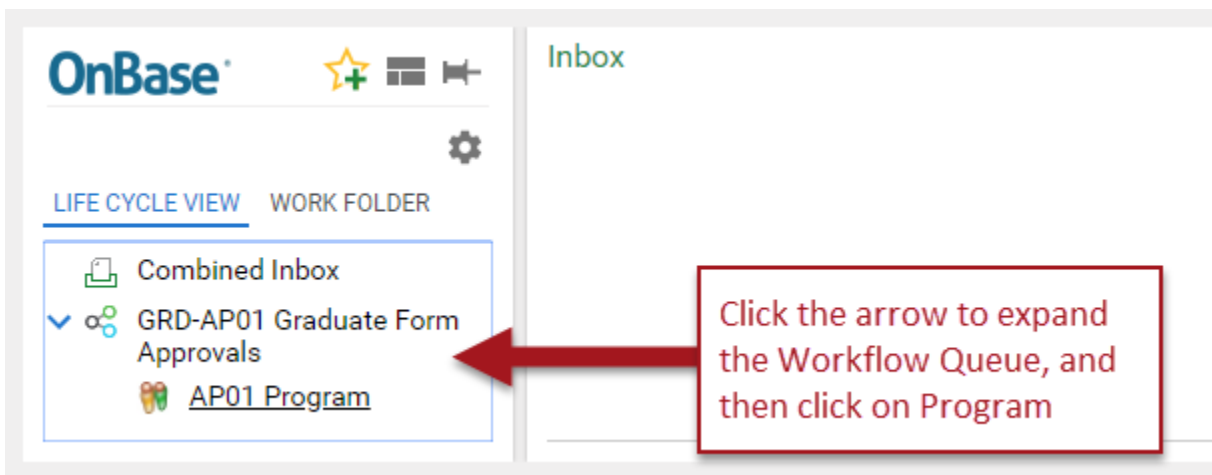
## 6. Approving/Processing Forms

### 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



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

OnBase

★ ☰ 📌 **Inbox**

Drag a column header here to group by that column.

DOCUMENT DATE	GRD - DOCUMENT STATUS	REDID
12/17/2019	IN PROCESS	800000000

Items: 1

Send to Grad Affairs  Cancel Form

LIFE CYCLE VIEW **WORK FOLDER**

Items: 0  
Filter: GRD - WF Filter - Grad Form Appro...

- Click on the form to open it

OnBase

★ ☰ 📌 **Inbox**

Drag a column header here to group by that column.

DOCUMENT DATE	GRD - DOCUMENT STATUS	REDID
12/17/2019	IN PROCESS	800000000

Items: 1

Send to Grad Affairs  Cancel Form

LIFE CYCLE VIEW **WORK FOLDER**

Items: 0  
Filter: GRD - WF Filter - Grad Form Appro...

## Change of Status

Form selected above will open here.

### Student Information

Last Name	First Name	SDSU ID	RedID
STUDENT	LAST	LAST@SDSU.EDU	800000000

Address  
5500 CAMPANILE DRIVE

City	State	Zip Code
SAN DIEGO	CA	92182

Preferred Phone Number	Email Address
619-594-0000	STUDENT@GMAIL.COM

Program	Program Type	Request Date
PSYCHOLOGY (MA)	MASTERS	10/29/2018

# 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.

## 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 graduation.
- The above conditionally classified student has **not** satisfactorily completed the conditions stated at the time of Admission. I recommend classification. 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 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**

The screenshot shows the OnBase interface. On the left, there's a navigation pane with 'OnBase' logo, a star icon, a grid icon, and a pin icon. Below that, there are icons for 'LIFE CYCLE VIEW' and 'WORK FOLDER'. The main area shows an 'Inbox' with a table of documents. The table has columns for 'DOCUMENT DATE', 'GRD - DOCUMENT STATUS', and 'REDID'. A single document is listed with the date '12/17/2019', status 'IN PROCESS', and ID '800000000'. Below the table, there are two buttons: 'Send to Grad Affairs' (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 highlight the document row and the 'Send to Grad Affairs' button, respectively.

DOCUMENT DATE	GRD - DOCUMENT STATUS	REDID
12/17/2019	IN PROCESS	800000000

## Change of Status

### Student Information

Last Name

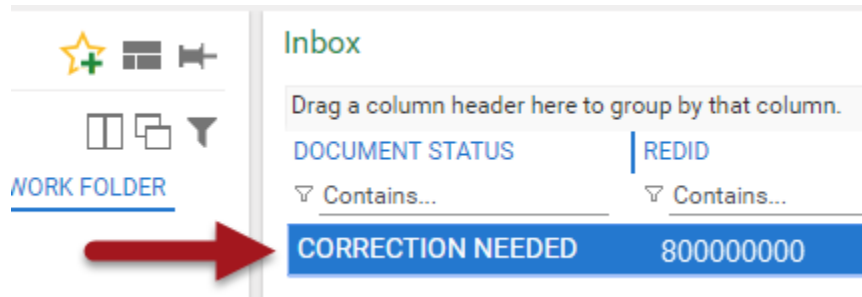
STUDENT

First Name

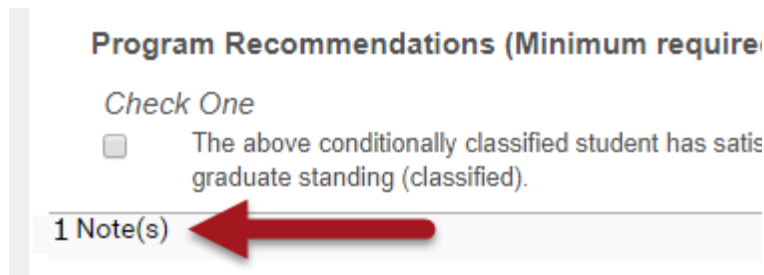
LAST

## Making Corrections

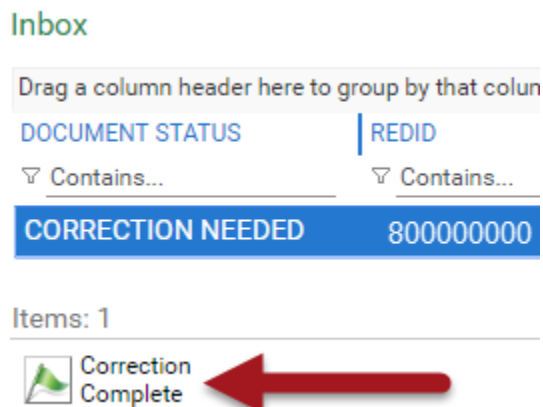
- In the event that Graduate Affairs requests a correction on the form, the form will return to your Workflow Inbox with the Status **Correction Needed**.



- 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.

### Inbox

Drag a column header here to group by that column.

DOCUMENT D... | GRD - DOCU... | REDID

▽ On...

▽ Contains...


▽ Contains...

12/17/2019

IN PROCESS

800000000

Items: 1

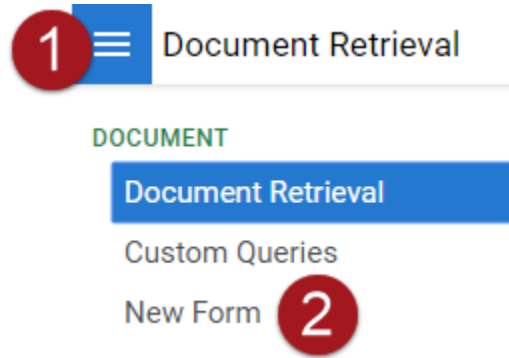
 Send  
to  
Grad  
Affairs

 Cancel  
Form



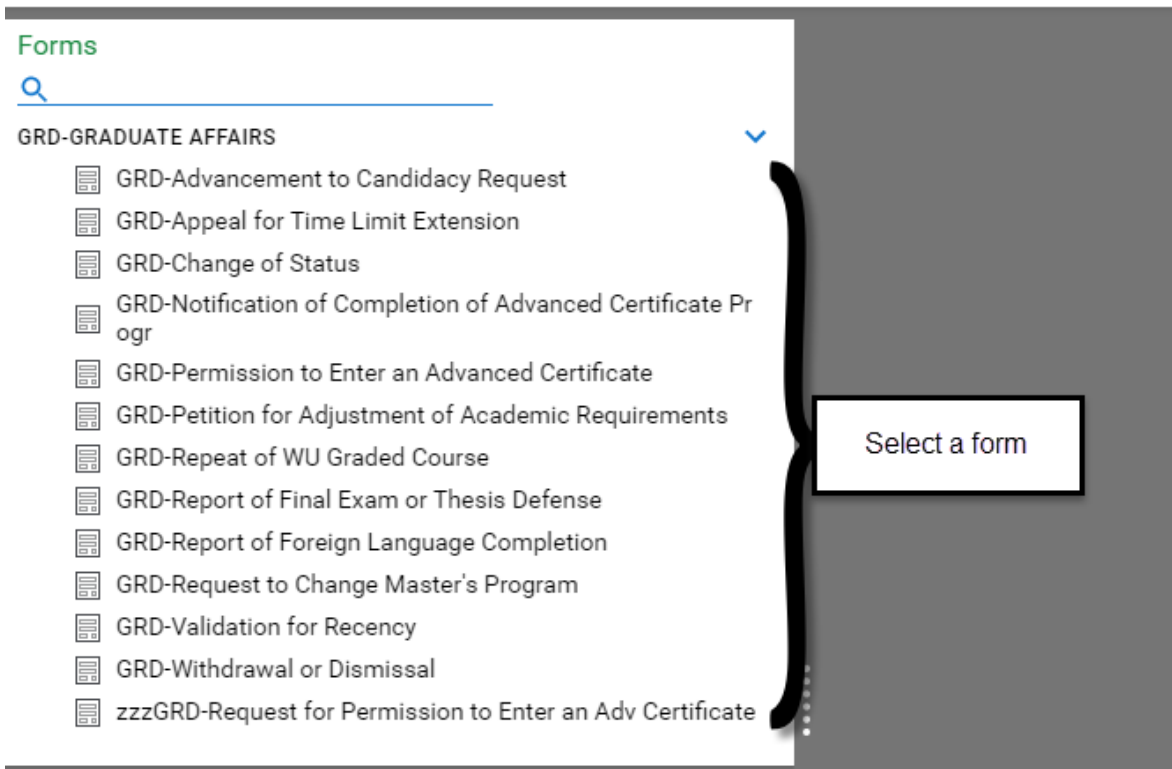
## 7. Initiating Forms on Student's Behalf

- 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.

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



- 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	Clear Student Data
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Clear Student Data"/>

Enter RedID or SDSU ID.

- 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.)

The screenshot displays the 'Document Retrieval' interface. At the top left, there is a blue menu icon and the title 'Document Retrieval'. Below this, the 'Document Types' section features a search bar and a list of form categories. A red arrow points to the 'GRD-Change of Status' option, which is marked with a blue checkmark. Below the list, it indicates '1 SELECTED'. The 'Document Date' section shows a date range from '10/1/2018' to '10/29/2018'. The 'Search Type' section has 'KEYWORDS' selected, with 'NOTES' as an alternative. Below this, there are input fields for 'SDSU ID' and 'RedID', followed by an equals sign. A large red arrow points to the search criteria. At the bottom, there is a blue 'Search' button and a toolbar with icons for a clock, a key, and a refresh symbol.



- 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	DOCUMENT DATE
Contains...	Contains...
<b>RED ID: FIRST LAST - FORM TYPE - DATE SUBMITTED</b>	<b>10/29/2018</b>
800000000: JONATHAN JOHNSON - GRD-Repeat of WU Graded Course - 10/25/2018	10/25/2018
800000001: MARIA ANTOINETTE - GRD-Request for Letter of Completion - 10/24/2018	10/24/2018

Items: 43