OnBase Forms
Faculty Research Leader User Guide
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1. Introduction

To expedite the submission, processing, and management of requests to conduct in-person research and/or creative activities, the Division of Research & Innovation is building an electronic form and workflow solution using OnBase. Many faculty may already be familiar with using the system, as it is used for many forms and workflows at SDSU.

As a Faculty Research Leader, you can do the following using OnBase:

- Submit a form to Add or Remove personnel for in-person research and/or creative activities.
- Submit a request to begin/resume in-person research and/or creative activities.

**Coming Soon:**
- Submit a request to add rooms for in-person research and/or creative activities.

**Support**

If you have any questions or suggestions, please contact the Division of Research & Innovation at DRI-CoV2@sdsu.edu.
2. Accessing Forms

- If prompted to log in, log in using your SDSU ID and password.
3. Selecting Form

- Click on the link for the form you would like to submit.
4. Submitting Personnel Form

- Once you click on the form link, the OnBase form will open and your information will fill in automatically.
- Enter the Red ID for your Personnel, and their name and email will automatically fill in. If you have made a mistake, you can click on “Clear Personnel” and try again.
- Fill in the required fields:
  - Personnel Mobile Phone Number
  - Personnel Position
  - Justification
- Click Submit.

**Note:** If you are not a Faculty Research Leader approved for in-person research, you will not be able to submit this form.
5. Submitting New Project Request Form

- Once you click on the form link, the OnBase form will open and your email, name, and Red ID will fill in automatically.
- Fill in the required fields:
  - Contact information
  - Project title
  - Brief project description
  - Special circumstances
  - Brief description of how many personnel will be active on the project and how you plan to ensure required social distancing
    - **Note**: Personnel will be individually requested and approved using the Additional Personnel Form once your project is approved
  - Buildings and Rooms used for project
    - **Note**: Room square footage will populate based on your room selection. Use this information to ensure you are planning for social distancing requirements.
- Click **Submit**
6. Approval Process

Add Personnel

- Research Leader submits request
- College Dean approves/denies request
- Vice President for Research & Innovation approves/denies request
- Personnel sent an email and link to complete Personnel Responsibilities Form
- Personnel is added to Database
- Research Leader notified that approval process is complete

Remove Personnel

- Research Leader submits request
- Personnel is removed from in-person personnel roster (no approval is needed)

New Project Request

- Research Leader submits request
- College Dean approves/denies request
- Vice President for Research & Innovation approves/denies request
- Project is added to Database
- Research Leader notified that approval process is complete
7. Notifications

- Once you have submitted your form, you will receive a series of notifications to keep you informed about the status of your request.
- Notifications may include:
  - Request Denied by College Dean
  - Request Denied by Vice President for Research & Innovation
  - Personnel has been approved and has completed required Personnel Acknowledgment form.
  - New project has been approved.