



SAN DIEGO STATE
UNIVERSITY

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:

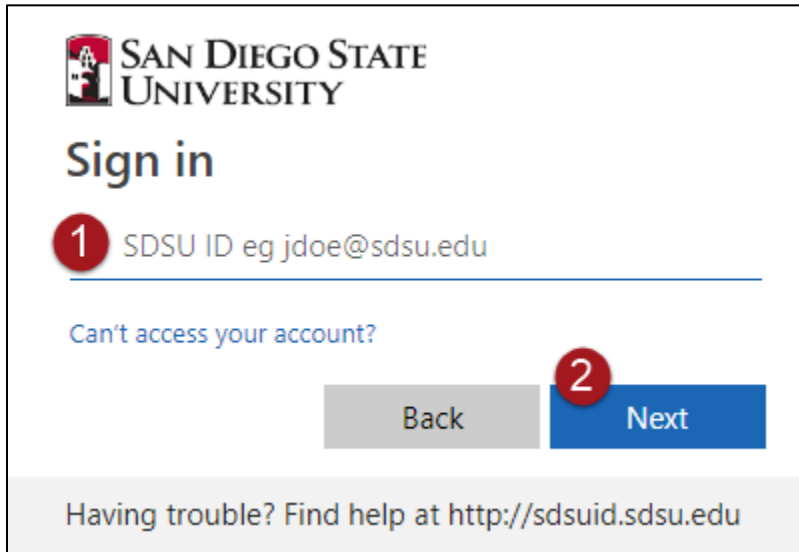
- Submit a request to add rooms for in-person research and/or creative activities.

Support

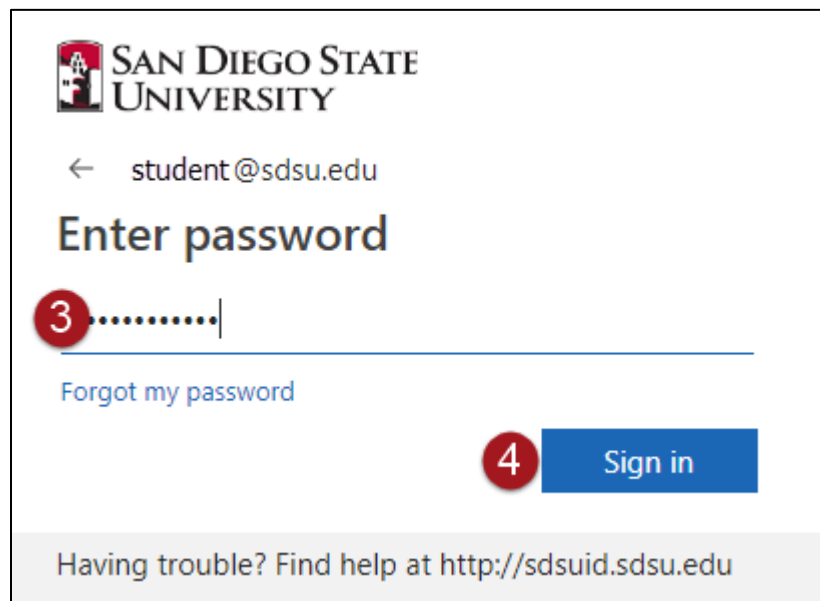
If you have any questions or suggestions, please contact the Division of Research & Innovation at DRI-CoV2@sdsu.edu.

2. Accessing Forms

- Navigate to <http://bit.ly/research-continuity>
- If prompted to log in, log in using your SDSU ID and password.



The screenshot shows the SDSU Sign in page. At the top left is the SDSU logo and the text "SAN DIEGO STATE UNIVERSITY". Below this is the heading "Sign in". A red circle with the number "1" is positioned to the left of the text "SDSU ID eg jdoe@sdsu.edu", which is followed by a horizontal input line. Below the input line is the link "Can't access your account?". At the bottom of the form are two buttons: a grey "Back" button and a blue "Next" button. A red circle with the number "2" is positioned to the left of the "Next" button. At the very bottom of the page is a grey footer bar with the text "Having trouble? Find help at <http://sdsuid.sdsu.edu>".



The screenshot shows the SDSU Enter password page. At the top left is the SDSU logo and the text "SAN DIEGO STATE UNIVERSITY". Below this is a back arrow followed by the text "student@sdsu.edu". The heading "Enter password" is centered. A red circle with the number "3" is positioned to the left of a password input field containing several dots and a vertical cursor. Below the input field is the link "Forgot my password?". At the bottom right of the form is a blue "Sign in" button. A red circle with the number "4" is positioned to the left of the "Sign in" button. At the very bottom of the page is a grey footer bar with the text "Having trouble? Find help at <http://sdsuid.sdsu.edu>".

3. Selecting Form

- Click on the link for the form you would like to submit.



The screenshot shows a SharePoint page for 'Research Continuity'. The top navigation bar includes 'SDSU Intranet', 'Graduate & Research Affairs', 'Research', 'Innovation', 'IT', and 'Graduate Affairs'. The main heading is 'Research Continuity Forms'. Below this, there is a welcome message and instructions to visit <https://research.sdsu.edu/coronavirus> and contact DRI. A section titled 'PERSONNEL REQUEST FORMS' includes instructions on how to use the form, mentioning 'approved Faculty Research Leader' and 'Red IDs' and 'mobile phone numbers'. A sub-section 'Add/Remove Personnel' is marked with a red circle containing the number '1'. Another section titled 'PROJECT REQUEST FORM' explains that a project request form is required for approval of voluntary re-initiation of in-person research, and that the form will be reviewed by the college Dean and the Vice President of Research and Innovation. A sub-section 'New Project Request' is marked with a red circle containing the number '2'.

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.

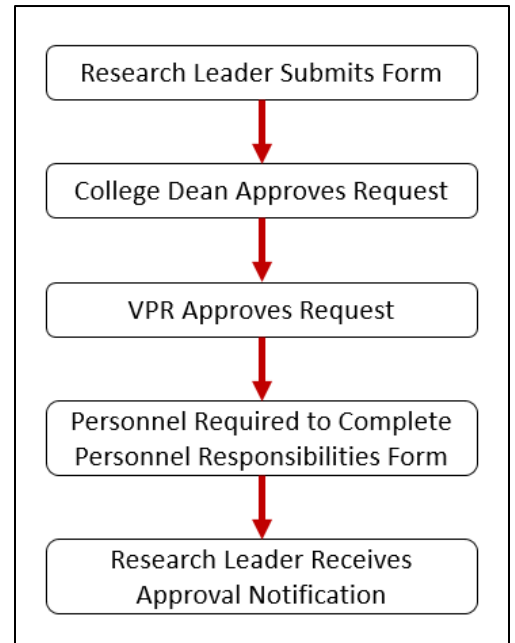
5. Submitting New Project Request Form

- 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.