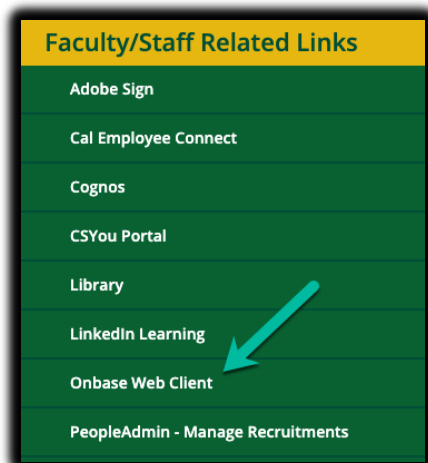


## OnBase Add/Drop/Withdraw from Courses Petition User Guide for the CCE Processing Team: Summer/Winter Sessions

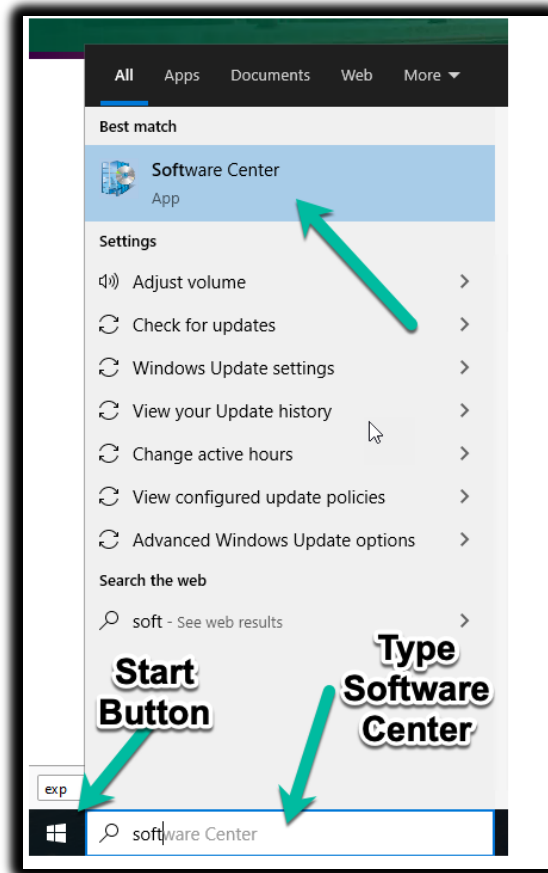
1. There are two ways the form will route during each **SUMMER and WINTER session**:
  - a. Before Census, the form will route from the Student to the Course Instructor for approval and then to the CCE Work queue for processing.
  - b. After Census, the form will go from the Student to the Instructor, then to the Department Chair, the Dean of College, and the CCE Work queue for processing.
2. Please sign into OnBase using Web or Unity Client. You can access **OnBase Web Client** through My Sac State:



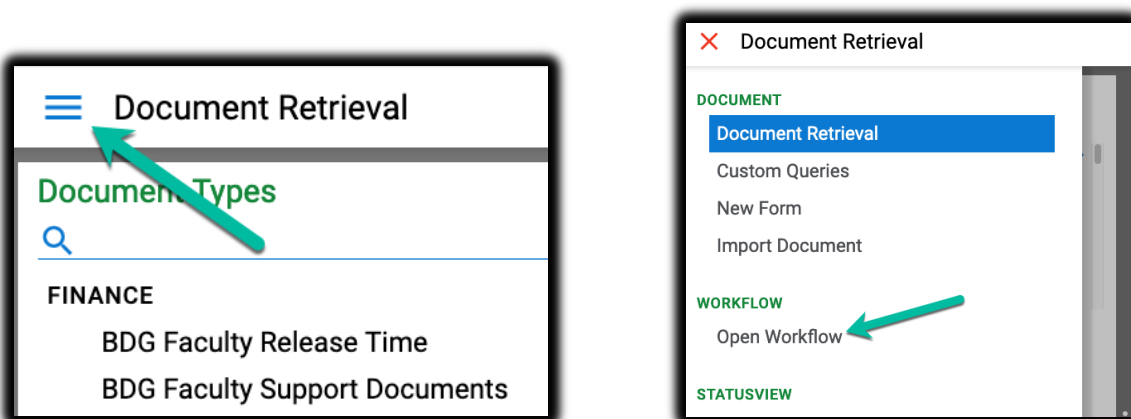
You can download the desk top version called **OnBase Unity Client** through your Software Center (Unity Client is not compatible with Mac computers):



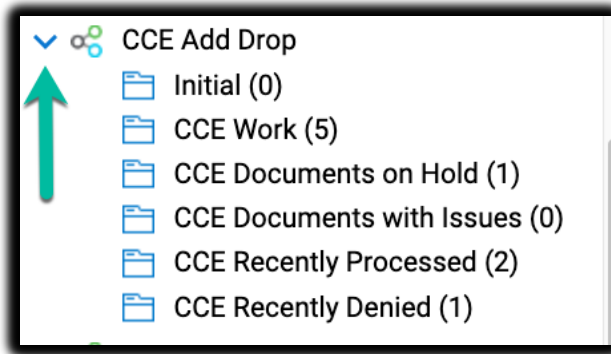
Go to your Start Button, type Software Center in the search field, click on the Software Center, download the app.



3. Sign into OnBase and Click on the “Hamburger” button on the top left and click **Open Workflow** (in the Web client). In Unity Client, click **Workflow**.



4. Click on the little arrow on the left of **CCE Add Drop** and the life cycle will open:



5. All Add Drop forms regardless of the time of the semester will route to the **CCE Work** queue for processing.

Drag a column header here to group by that column.

COURSE SUBJECT	COURSE NUMBER	COURSE SECTION	FORM #	STUDENT ID	LAST NAME
ENGL	20	02	35995	5	LUCAS
ACCY	261	50	36003	9	KHAYKI
POLS	1	04	36035	5	LUCAS
ACCY	131	01	36036	5	LUCAS
ACCY	171	01	36064	5	LUCAS

On the left side of the interface, there is a folder list under 'LIFE CYCLE VIEW' and 'WORK FOLDER'. The folders are: 'APPRV Department Approval', 'CCE Add Drop', 'Initial (0)', 'CCE Work (5)', 'CCE Documents on Hold (1)', 'CCE Documents with Issues (0)', 'CCE Recently Processed (2)', and 'CCE Recently Denied (1)'. A green arrow points to the 'CCE Work (5)' folder.

Double-click on the form to open it.

- a. Review the form
- b. Key it in
- c. Click **Complete** or **Cannot Process**.
- d. If you cannot process the form, the comments will be required.
- e. Click **Save**.
- f. Click **Complete** or **Denied** at the end.
- g. An automatic email will be sent to the student with your comments to explain to them why you couldn't process the form.

OnBase

Inbox

Drag a column header here to group by that column.

COURSE SUBJECT	COURSE NUMBER	COURSE SECTION	FORM #
Contains...	Contains...	Contains...	Equals...

Items: 5

Completed Denied Has Hold

**Department/Registrar's Office/CCE Processing**

Process Status

☐ Complete ☐ Cannot Process

Processed By

Date

Comments

200 characters left.

**Save Form**

Click **Cannot Process** and leave your reasons in the **Comment Box**. Then click **Save** and **Denied** on the top.

CCE Add Drop

Initial (0)

Completed Denied Has Hold

**Department/Registrar's Office/CCE Processing**

Process Status

☐ Complete ☒ Cannot Process

Processed By

Lucas, Nadya

Date

05/26/2021

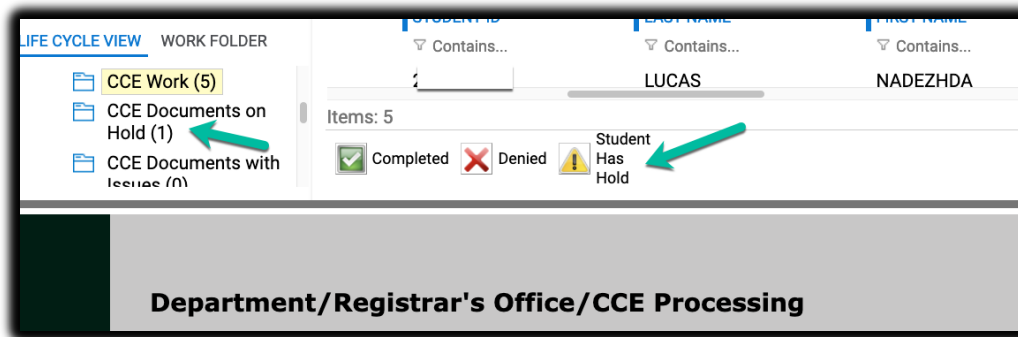
Comments

Please type in a reason the request cannot be processed.

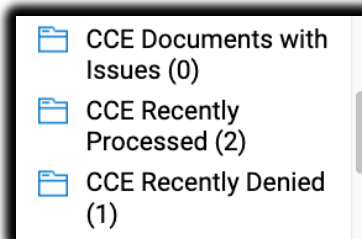
200 characters left.

**Save Form**

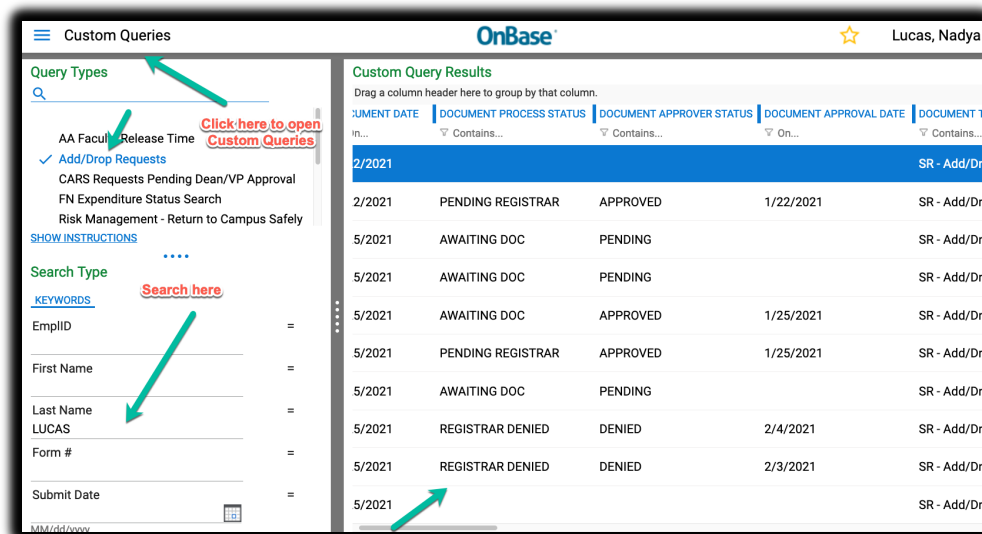
- If a student has a hold, click **Student Has Hold** and the form will move to the **CCE Documents on Hold** queue. When a student clears their hold, process the form using the same steps.



7. When the form is processed, it will move either to Recently processed or Recently Denied queue. If there are any issues with the form, it will be in Documents with Issues queue – please review and let us know if it's not clear what the issue is.



8. In order to access a Custom Query and see where the form is in the process, go to the “hamburger” button and click Custom Query:



9. When you complete or deny the form, an automated email will go to the student. The approval email will say that CCE has processed the form. The Denial email will have the reasons for denial from the comment box you fill out in your section.

10. When you click **Student Has Hold** and move the form to the **Hold** queue, the student will receive an automatic email:

Hello **[Student Name]**,

The Course Add Form you submitted on **[Form Submission Date]** for **[Course Subject]** **[Course Number]** has been reviewed by the College of Continuing Education, and unfortunately it cannot be processed at this time because you have a registration hold(s).

For more information on your registration hold(s), please review the “Holds” section of your Student Center. Here, you will find information on the department that placed the hold, as well as specific details about the hold.

We will hold on to your Add Form for **1 week** so registration holds can be resolved. After **1 week**, you will need to submit a new Add Form.

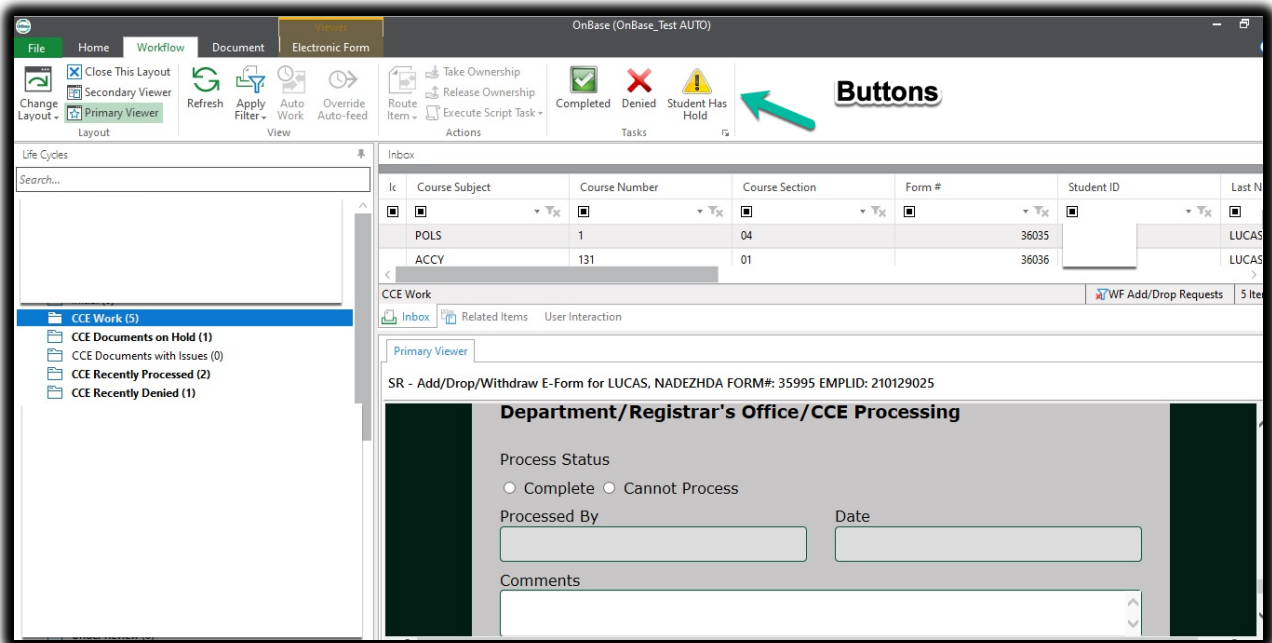
**Important:**

**Submission of this add form does not hold or reserve your seat in the class, and your seat is not guaranteed. It is your responsibility to notify us when your registration holds are removed so your petition can be reevaluated for seat availability and eligibility to take the course.**

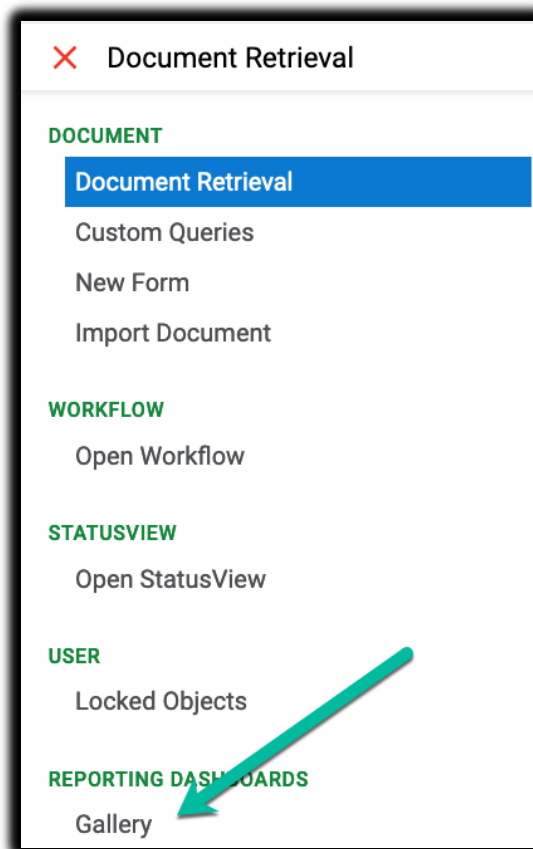
Once you have contacted the appropriate department(s) and your registration holds have been removed, please notify College of Continuing Education at [ccecreditreg@csus.edu](mailto:ccecreditreg@csus.edu).

**College of Continuing Education**  
[ccecreditreg@csus.edu](mailto:ccecreditreg@csus.edu)

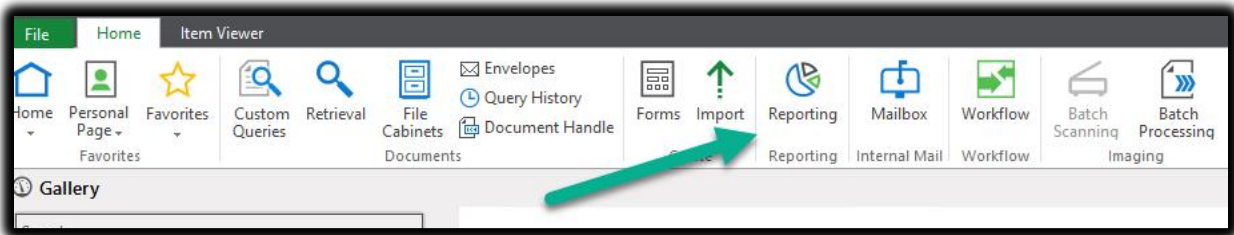
11. After the forms are processed, we recommend signing out and quitting/restarting the browser before you process new forms because OnBase often needs a browser restart to create a new session. The best way is to right-click on the browser icon and click **Quit**.
12. If you are using the OnBase Unity Client, this is what you are going to see when you sign in:



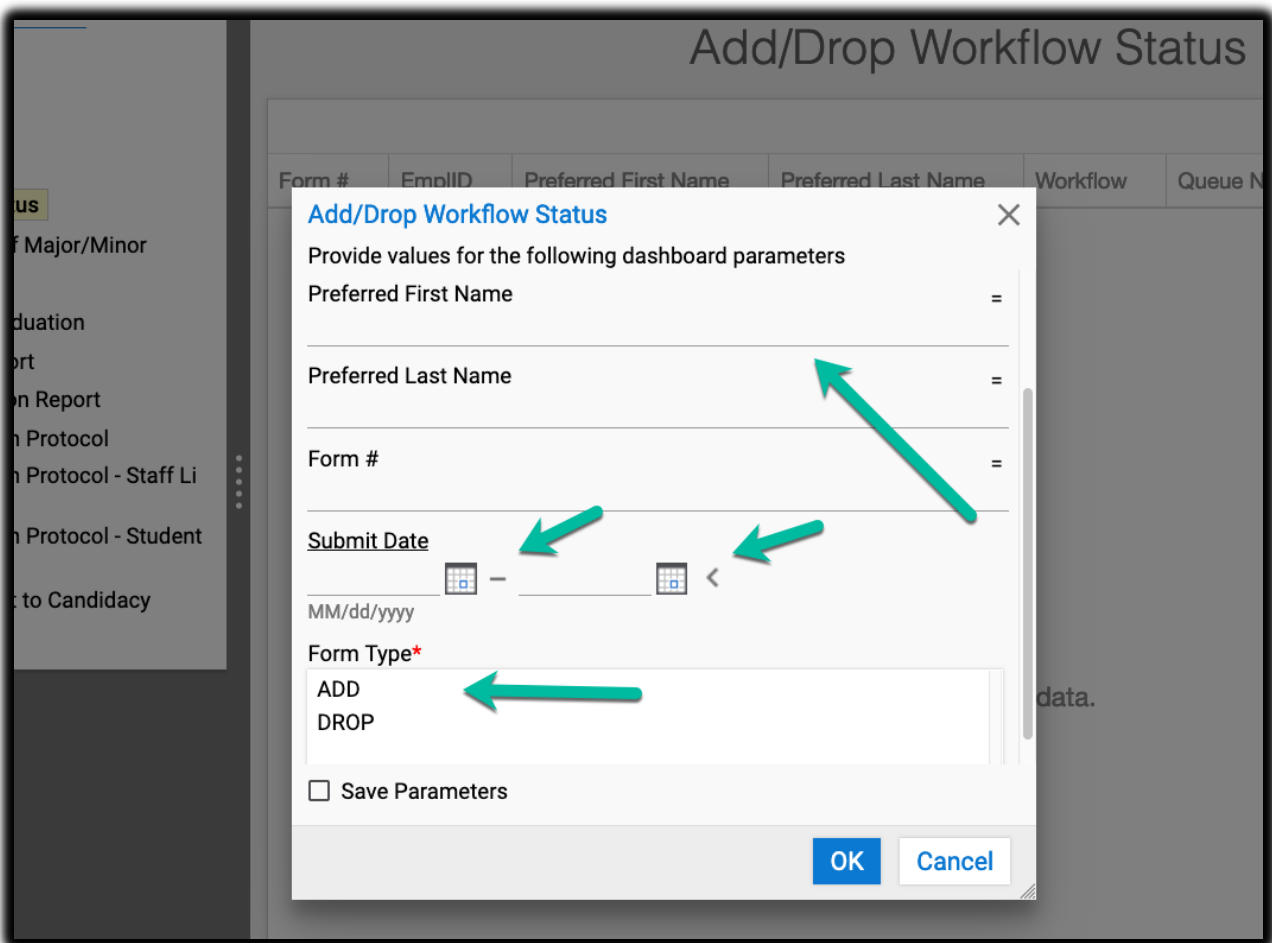
13. To access reports in the Web Client, go to the “hamburger” button and click Gallery. Then click Shared with Me.



14. In Unity Client, it's called Reporting:



15. Choose Add or Drop or both and enter search parameters (Name, ID, Dates, etc.):



16. If you have any technical issues, please submit a ticket to IRT or email to [servicedesk@csus.edu](mailto:servicedesk@csus.edu). Please indicate what the issues is and the form number.

**THANK YOU!**