

# OnBase Retrieval Guide Change of Major Form

**Web Client**

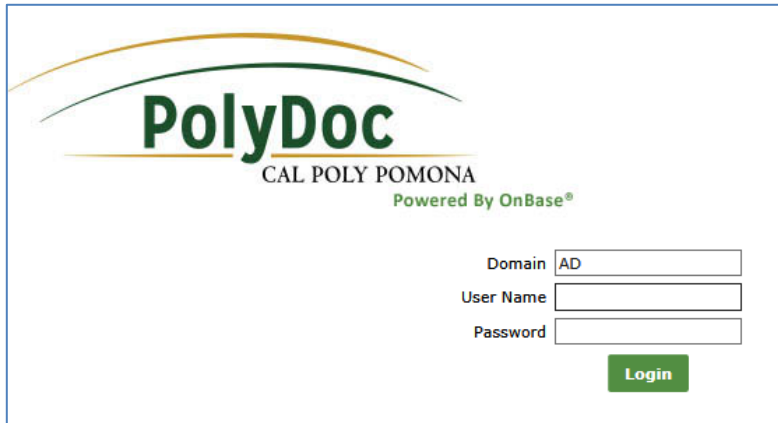
OnBase Version: 15.0.2.174

Date: 08/17/2016

## Getting Started

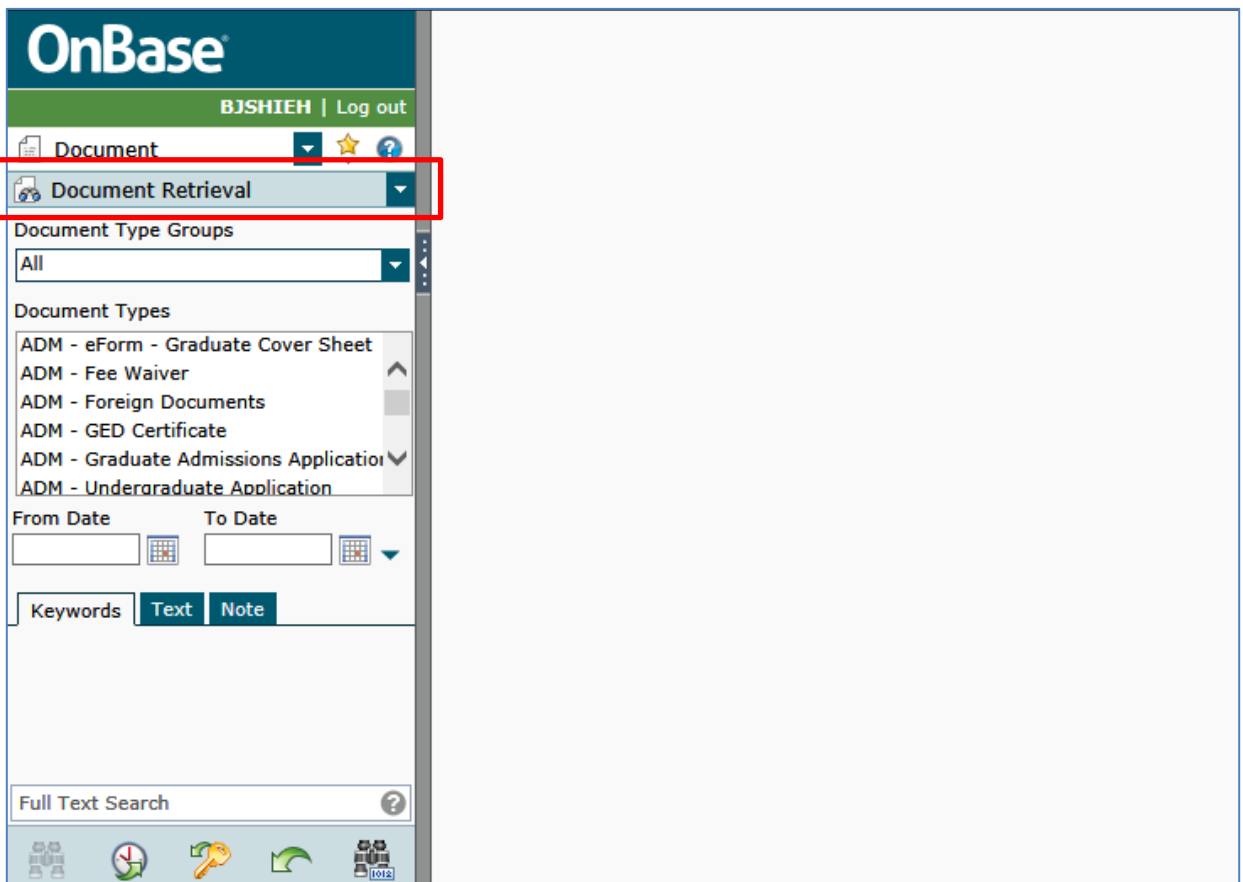
To login to PolyDoc:

1. Navigate to the web address provided:  
<https://polydoc.csupomona.edu/AppNet/>



The image shows the PolyDoc login interface. At the top, there is a logo for PolyDoc, CAL POLY POMONA, Powered By OnBase®. Below the logo, there are three input fields: Domain (with 'AD' entered), User Name, and Password. A green 'Login' button is positioned below the Password field.

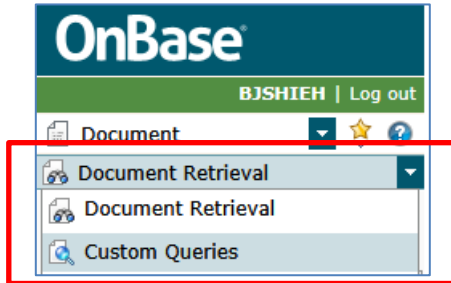
2. Log in with your regular WIN credentials (It's OK that the domain shows "AD" instead).
3. Once you have successfully logged into the system, you will be taken directly to the Document Retrieval screen.



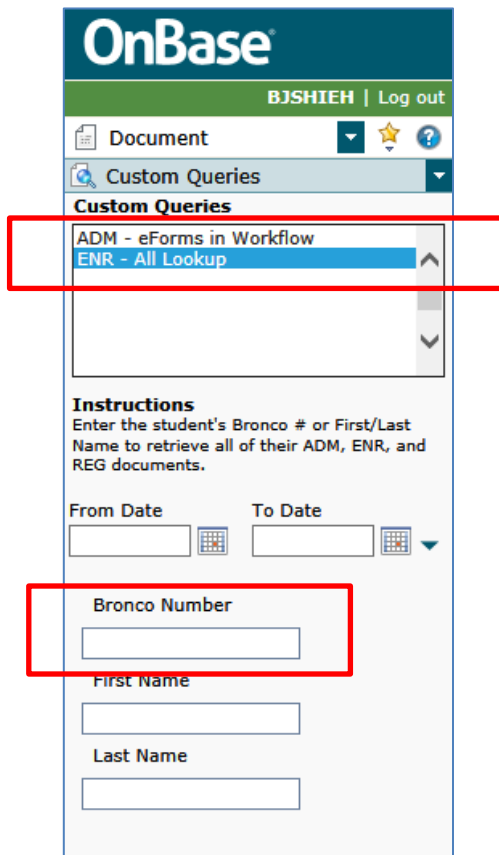
The image shows the OnBase Document Retrieval screen. The top navigation bar includes the OnBase logo, the user name 'BJSIHIEH', and a 'Log out' link. Below this, there is a 'Document' menu item and a 'Document Retrieval' menu item, which is highlighted with a red box. The main content area displays 'Document Type Groups' with a dropdown set to 'All'. Underneath, there is a list of 'Document Types' including 'ADM - eForm - Graduate Cover Sheet', 'ADM - Fee Waiver', 'ADM - Foreign Documents', 'ADM - GED Certificate', 'ADM - Graduate Admissions Application', and 'ADM - Undergraduate Application'. There are also 'From Date' and 'To Date' fields with calendar icons, and 'Keywords' tabs for 'Text' and 'Note'. At the bottom, there is a 'Full Text Search' field and a toolbar with various icons.

## Finding All records for a particular student

1. To find all the records for ONE student. Change the mode from Document Retrieval to **Custom Queries**.



2. Select the ENR – All Lookup query and enter the student's Bronco Number. Then click the binoculars (find) to return all records available for the student.

A screenshot of the OnBase web application interface. The 'Custom Queries' dropdown menu is open, showing two options: 'ADM - eForms in Workflow' and 'ENR - All Lookup'. The 'ENR - All Lookup' option is highlighted, and the dropdown menu is enclosed in a red rectangular box. Below the dropdown menu, there is an 'Instructions' section with the text: 'Enter the student's Bronco # or First/Last Name to retrieve all of their ADM, ENR, and REG documents.' There are two date input fields labeled 'From Date' and 'To Date', each with a calendar icon. Below these, there is a 'Bronco Number' input field, which is highlighted with a red rectangular box. Below the 'Bronco Number' field, there are two more input fields labeled 'First Name' and 'Last Name'.

## Finding All Change of Major forms for your Department

1. To find all the Change of Major forms that have been submitted for your department, switch back to **Document Retrieval** and then navigate to the following:
  - a. Document Type Group: **Registrar**
  - b. Document Type: **REG – eForm – Change of Major**
  - c. Major Effected: **Your Major**

Then click the binoculars (find) to return all forms. In the future you can also add a **From Date** and **To Date** to limit the date range of the results.

The screenshot shows the OnBase Document Retrieval interface. The user is logged in as BJSIHIEH. The interface includes a search bar, a list of document types, and a list of major categories. The following elements are highlighted with red boxes:

- The **Document Retrieval** dropdown menu.
- The **Registrar** dropdown menu under Document Type Groups.
- The **REG - eForm - Change of Major** document type.
- The **Major Effected** dropdown menu, with the following options visible: AEROSPACE ENGINEERING, AGRIBUSINESS AND FOOD INDUSTRY, AGRICULTURAL SCIENCE, ANIMAL HEALTH SCIENCE, ANIMAL SCIENCE, and ANTHROPOLOGY.

The right side of the interface shows a list of documents, all titled "REG - eForm - Change of Major".