

OnBase Quick Reference Guide

Dean Access and Workflow Overview

This guide instructs Deans on how to access the Academic Faculty Evaluation form and associated workflow queues via Trailhead, using the OnBase Web Client.

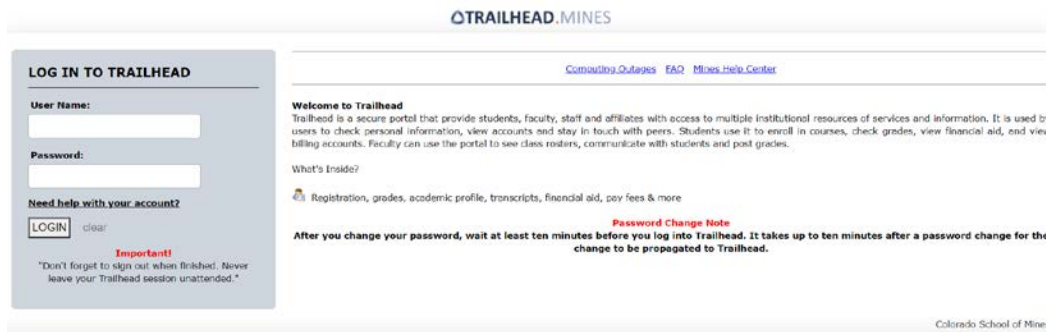
Accessing Workflow

To access the Academic Faculty Evaluation workflow, the Dean will perform the following steps to login to the OnBase Web Client.

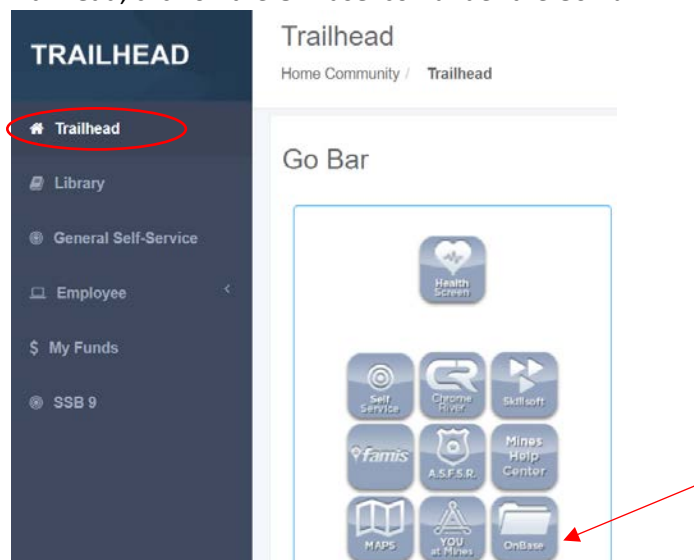
1. Double click on your preferred internet browser icon to launch the browser.
(Recommended: Chrome).



2. Navigate to Trailhead and login using your **Multipass credentials**: <https://trailhead.mines.edu/>



3. Under the tab labeled **Trailhead**, click on the **OnBase** icon under the *Go Bar*.



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- You will be redirected to an OnBase login page. Login using your **Multipass credentials**. This is the same *username* and *password* you use to log into your email, Trailhead, etc.



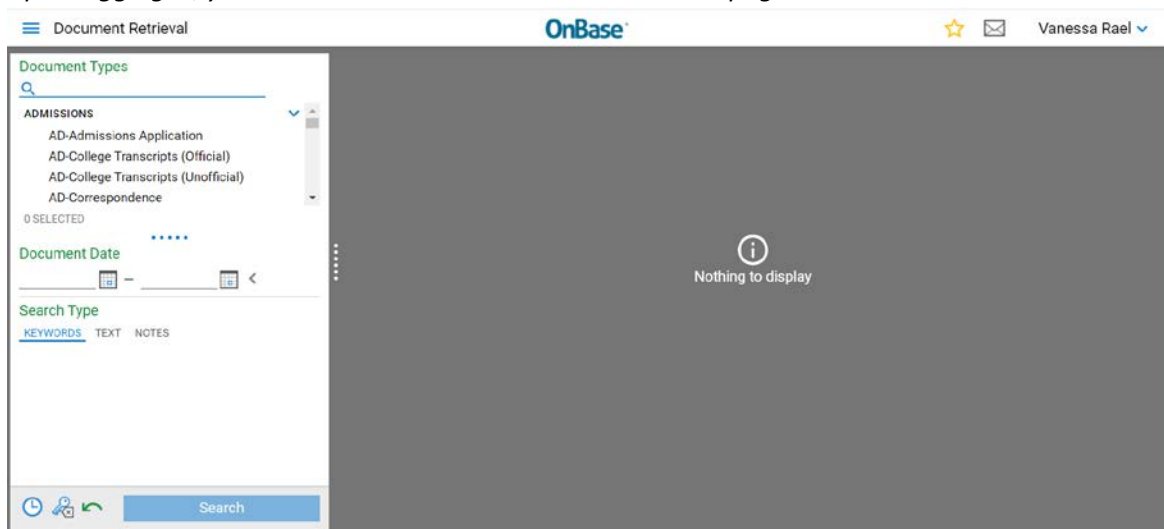
ADIT.MINES.EDU

User name

Password

Login

Upon logging in, you will be directed to the Web Client Homepage.

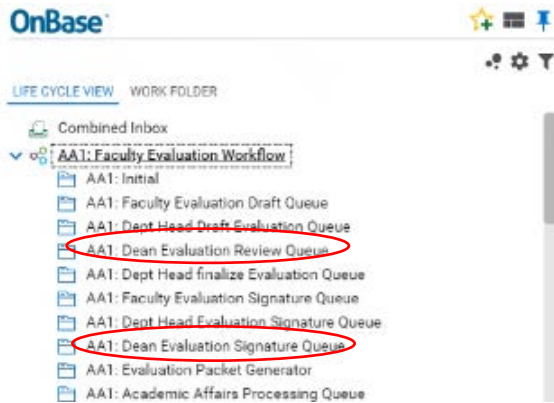


- Click on the three bars at the top left corner of your screen and select **Open Workflow**.



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- Workflow will open in a popup window. Click on the carrot next to *AA1: Faculty Evaluation Workflow* to view the workflow queues.



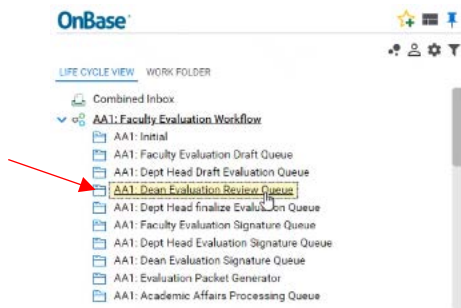
*Note: In the Dean role, you will have access to see two workflow queues: **Dean Evaluation Review Queue** and **Dean Evaluation Signature Queue**.*

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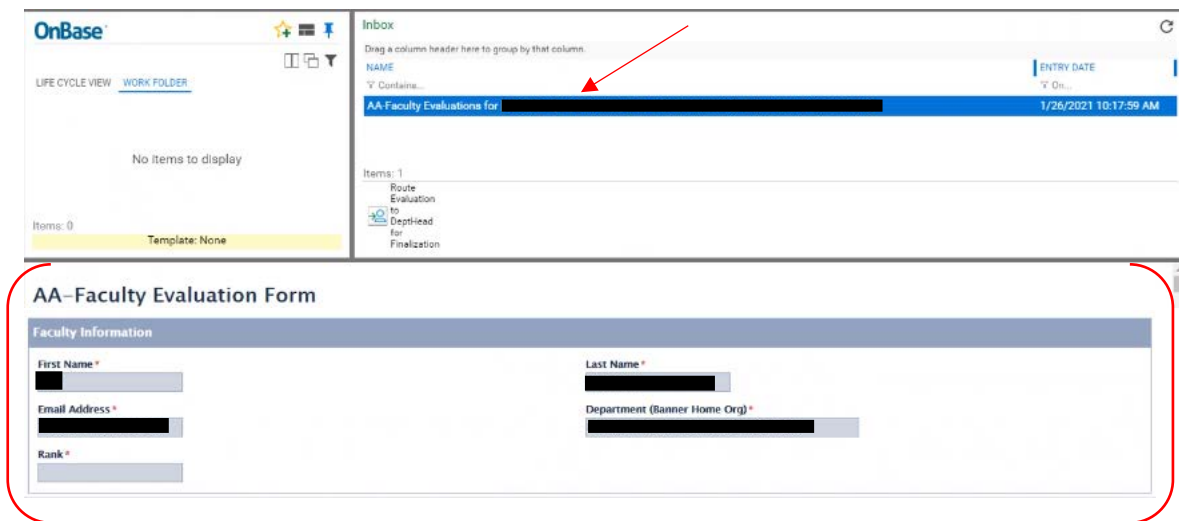
Dean Evaluation Review Queue

This workflow queue is used by the Dean to review Faculty Evaluations in order to provide feedback to Department Heads (outside of workflow). Once review is complete, this queue allows the Dean to route the evaluation back to the Department Head.

1. Select the **AA1: Dean Evaluation Review Queue**



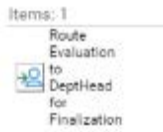
2. On the right-hand side of screen, click on the evaluation you would like to review. The evaluation will be visible in the bottom pane of the window:



3. The Dean can review the evaluation and any associated attachments, and has view-only access. Any feedback to the Department Head must be communication outside of workflow (i.e. email, meeting, etc.).

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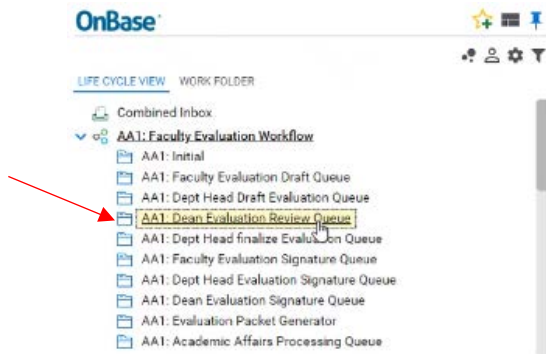
Once review is completed, navigate to the center of your screen and click on the **Route Evaluation to Dept Head for Finalization** user action to route the evaluation back to the Department Head.



4. The evaluation will still appear in your queue. To refresh your workflow queue, navigate to *Life Cycle View*.



Select the **AA1: Dean Evaluation Review Queue** again.



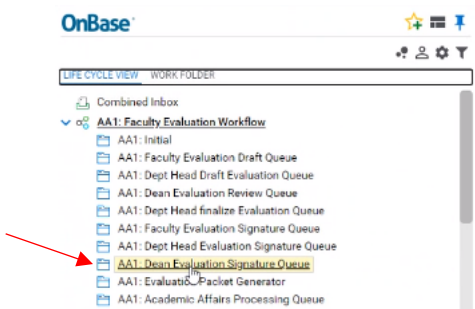
The evaluation you just routed will no longer display. Proceed with steps 2 and 3 to review the remaining evaluations in your queue.

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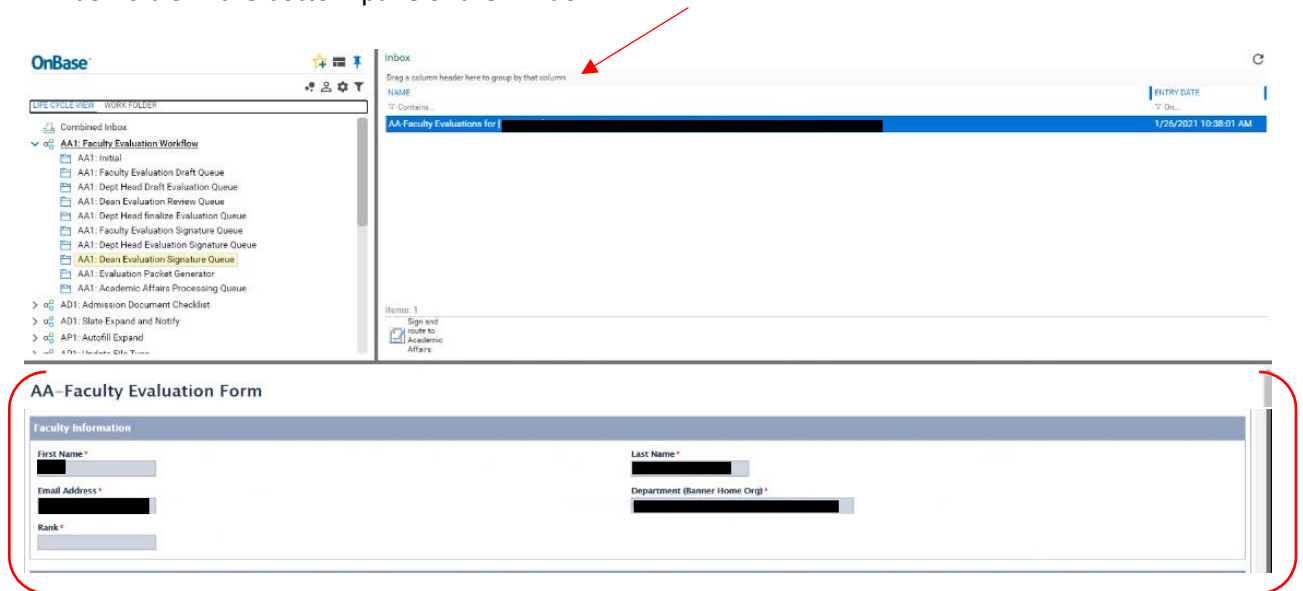
Dean Evaluation Signature Queue

This workflow queue is used by the Dean to sign finalized Faculty Evaluations.

1. Select the **AA1: Dean Evaluation Signature Queue**.

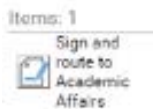


2. On the right-hand side of screen, click on the evaluation you would like to sign. The evaluation will be visible in the bottom pane of the window:



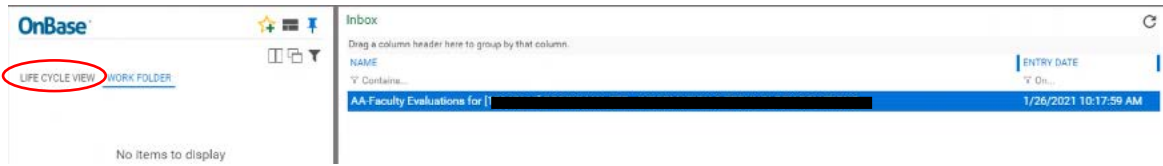
3. The Dean can review the evaluation and any associated attachments again (with view-only access).

Once review is completed, navigate to the center of your screen and click on the **Sign and route to Academic Affairs** user action (this action is equivalent to signing the evaluation).

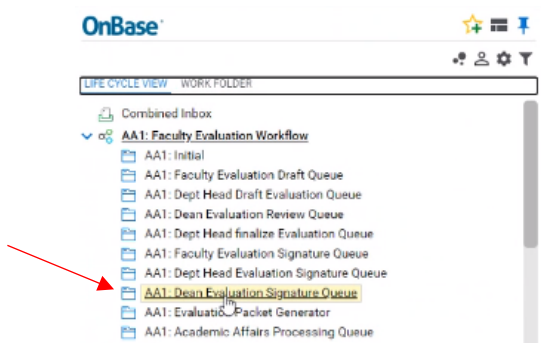


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- The evaluation will still appear in your queue. To refresh your workflow queue, navigate to *Life Cycle View*.



Select the **AA1: Dean Evaluation Signature Queue** again.



The evaluation you just signed will no longer display. Proceed with steps 2 and 3 to review and sign the remaining evaluations in your queue.

Note: Upon signing the evaluation, it will be routed to Academic Affairs for final processing and an email notification will be sent to the Faculty and Department Head with a link to the final, signed evaluation.