

## Accessing and Initial Completion and Submission of the Academic Faculty Evaluation and Workflow

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

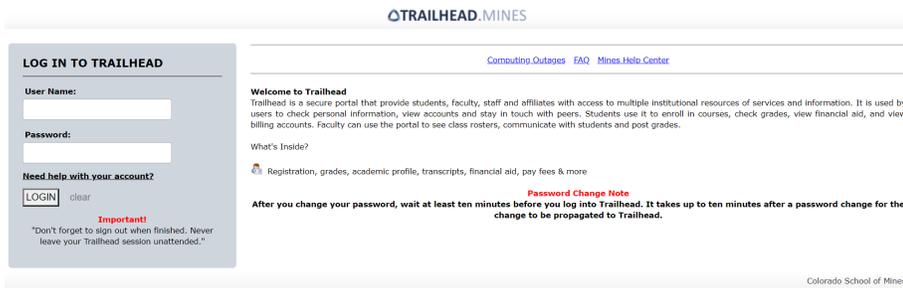
### Accessing and Saving the Academic Faculty Evaluation (Initial save/submission)

To access the Academic Faculty Evaluation form for the first time, perform the following steps to login to the OnBase Web Client.

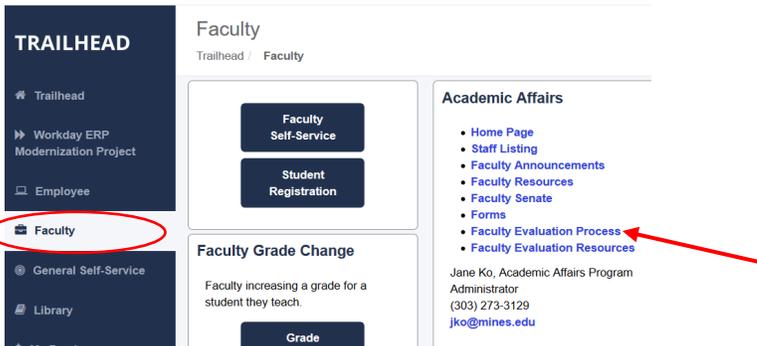
1. Double click on your preferred internet browser icon to launch the browser. (Recommended: Chrome).



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



3. Select **Faculty** from the left-hand menu and click on the **Faculty Evaluation Process** link under Academic Affairs.



# OnBase Quick Reference Guide

- You will be redirected to the OnBase Web Client where your information will populate on the evaluation form.

## AA-Faculty Evaluation Form

The screenshot shows a web form titled "AA-Faculty Evaluation Form". It is divided into two main sections: "Faculty Information" and "Department Head Information".

**Faculty Information**

First Name *	Last Name *
Email Address *	Department (Banner Home Org) *
Rank *	

**Department Head Information**

Last Name *	First Name *	DH Email Address *
-------------	--------------	--------------------

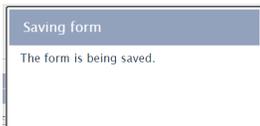
**Review Period**

CY2020

- Proceed with filling out the form. **Note that you will receive your Faculty Data Sheet in either pdf or excel format from your Department Head or Department Admin at least a week before the submission deadline.**
- To save your work and exit the form, click the **Save Evaluation** button at the bottom of the page.

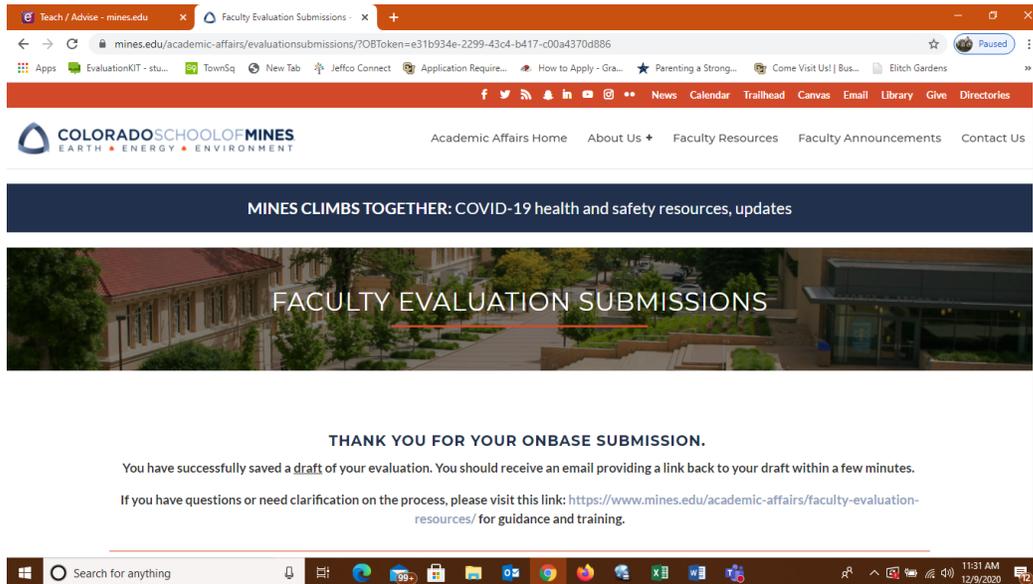
**Save Evaluation**

A popup window will appear showing that the form is being saved.



## OnBase Quick Reference Guide

- Once your form has been saved, you will be redirected to a confirmation page with instructions on next steps.



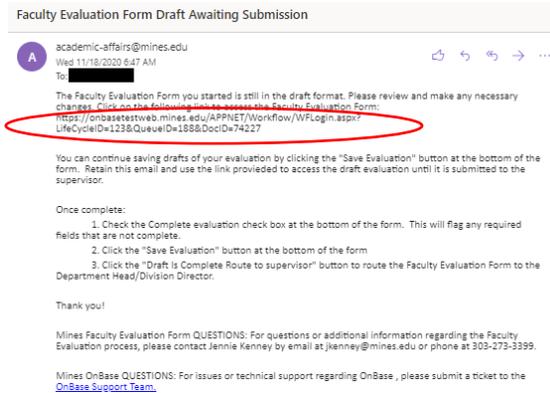
- To return to the draft form to make further changes, see the following sections:
  - Re-accessing and finalizing your Academic Faculty Evaluation draft in Workflow (Using emailed link)
  - Re-accessing and finalizing your Academic Faculty Evaluation draft in Workflow (Navigating to your saved evaluation in the OnBase Web Client via Trailhead)
- To submit the form to your Department Head, see **Submitting your Academic Faculty Evaluation to the Department Head in Workflow.**

# OnBase Quick Reference Guide

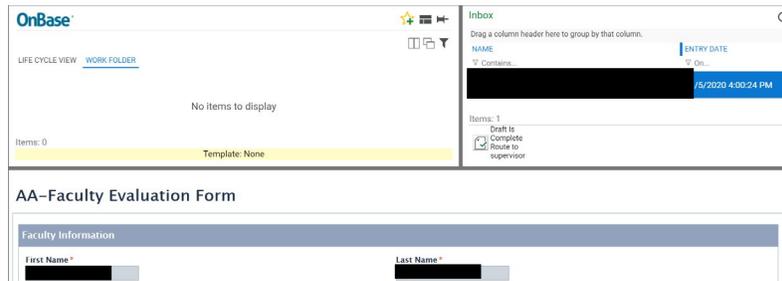
## Re-accessing and finalizing your Academic Faculty Evaluation draft in Workflow (Using emailed link)

To access your Academic Faculty Evaluation draft in workflow (Faculty Evaluation Draft Queue), perform the following steps to login to the OnBase Web Client.

1. After saving your evaluation draft, you will receive an email notification containing a link to your evaluation in OnBase.



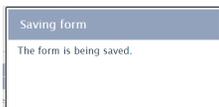
2. If the link is active, you can click on it. Otherwise, copy and paste the link into a web browser.
3. You will be directed to your evaluation in the OnBase Web client.



4. Upon opening the evaluation, you can proceed with filling out the form. After completing your evaluation, click the **Save Evaluation** button at the bottom of the page.

**Save Evaluation**

5. After clicking the Save Evaluation button, a popup window will appear showing that the form is being saved.



# OnBase Quick Reference Guide

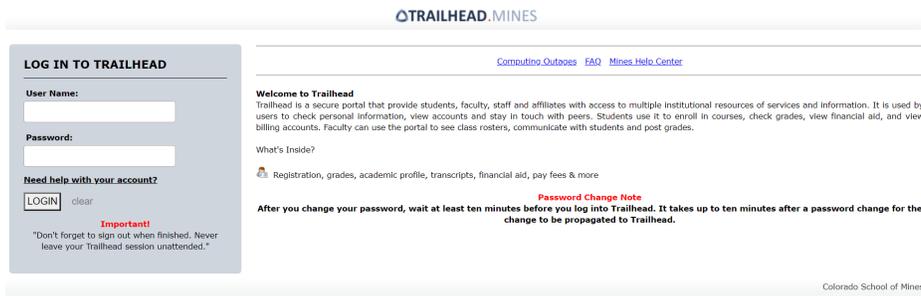
## Re-accessing your Academic Faculty Evaluation draft in Workflow (Navigating to your saved evaluation in the OnBase Web Client via Trailhead)

Perform the following steps to login to the OnBase Web Client and access your Academic Faculty Evaluation draft in workflow (Faculty Evaluation Draft Queue).

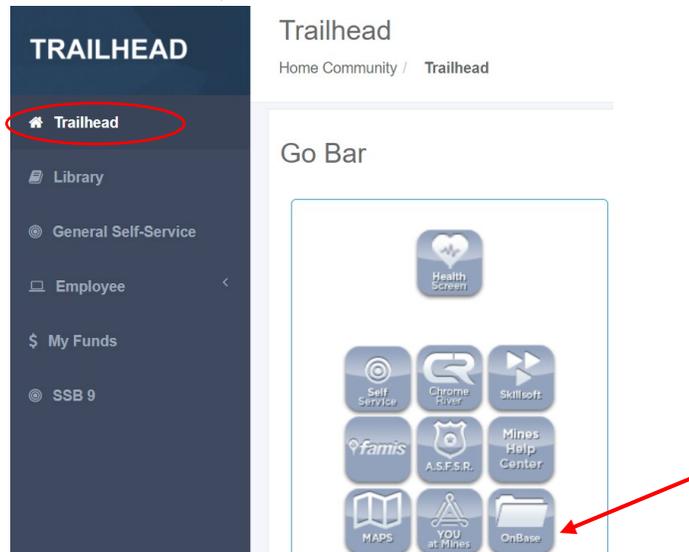
1. After saving your evaluation, you can access your draft evaluation directly through the OnBase web client.
  - a. Double click on your preferred internet browser icon to launch the browser. (Recommended: Chrome).



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



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



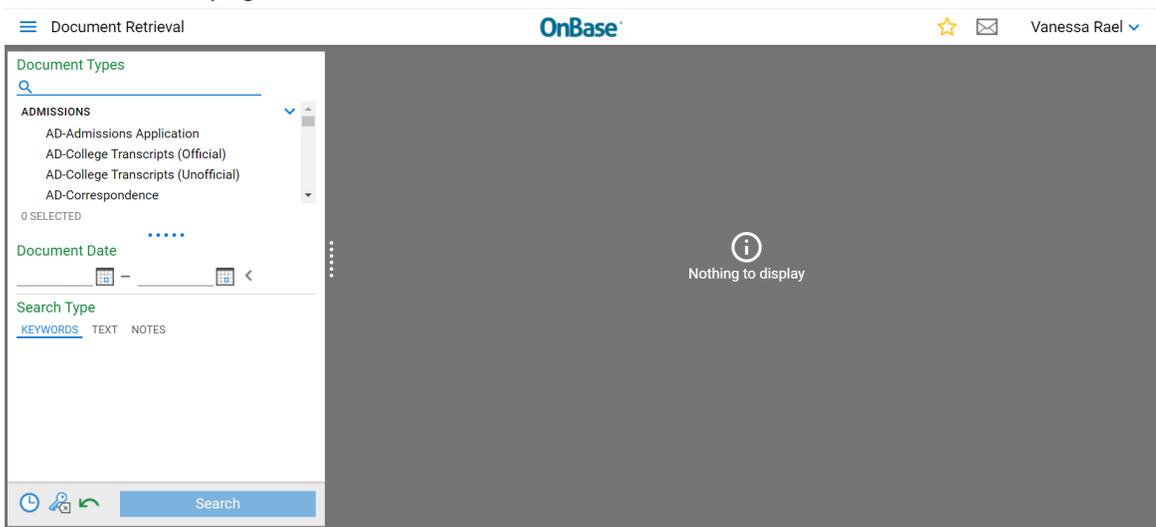
# OnBase Quick Reference Guide

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.

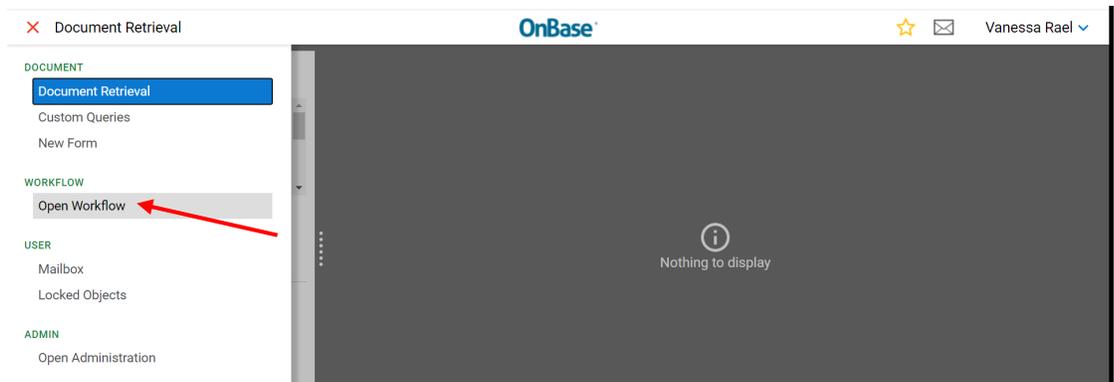


ADIT.MINES.EDU  
User name  
Password  
Login

## Web Client Homepage

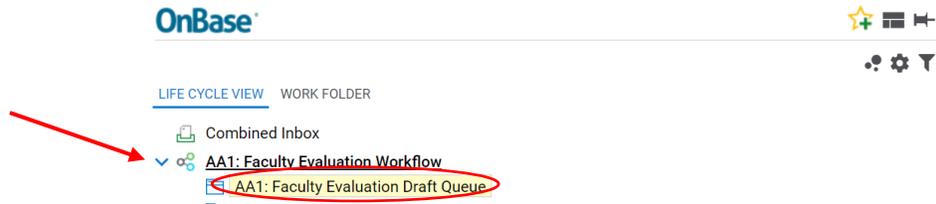


d. Click on the three bars at the top left corner of your screen and select **Open Workflow**.

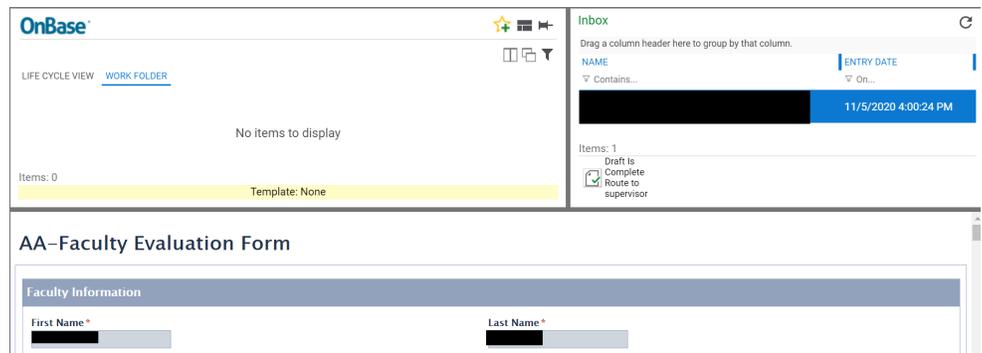


# OnBase Quick Reference Guide

- e. A popup window will appear. Click on the carrot next to *AA1: Faculty Evaluation Workflow* and click on **AA1: Faculty Evaluation Draft Queue**.



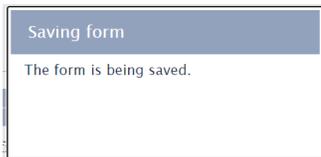
- f. Click on your evaluation in the top right-hand window, and the evaluation will open in the window below.



- 2. Upon opening the evaluation, you can proceed with filling out the form. After completing your evaluation, click the **Save Evaluation** button at the bottom of the page.



- 3. After clicking the Save Evaluation button, a popup window will appear showing that the form is being saved.

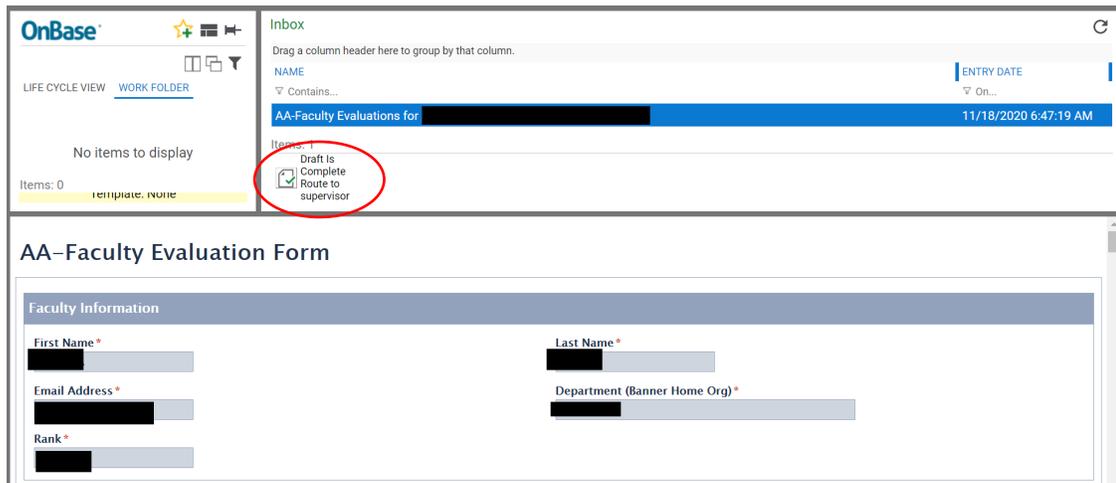


## OnBase Quick Reference Guide

### Submitting your Academic Faculty Evaluation to the Department Head in Workflow (within the Faculty Evaluation Draft Queue)

Perform the following steps to submit your Academic Faculty Evaluation to your Department Head using the Faculty Evaluation Draft Queue in workflow.

1. After saving the evaluation, click on the **Draft is Complete Route to supervisor** user action button (located toward the upper-middle of your screen) to submit a finalized Academic Faculty Evaluation to your Department Head.



2. Once the evaluation has been routed to your supervisor, it will enter their workflow queue, and you will no longer have permissions to edit the evaluation. You should see a dialog box pop up stating that it has been submitted. **Do NOT click the route to supervisor more than once as it will send your DH an email every time you click the button.** You will receive an email whenever the evaluation returns to your workflow queue, either if it is returned to you by your supervisor for corrections or once your supervisor has finalized feedback and is ready to meet to discuss the evaluation.
3. Exit workflow by closing all browser windows.