Accessing, Initial Completion and Submission of the Department Head Evaluation form into Workflow

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

Accessing and Saving the Department Head Evaluation form (Initial save)

To access the Department Head Evaluation form, 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: <u>https://trailhead.mines.edu/</u>

LOG IN TO TRAILHEAD	Computing Outages FAQ Mines Help Center
User Name:	Welcome to Trailhead Trailhead is a secure portal that provide students, faculty, staff and affiliates with access to multiple institutional resources of services and information. It is used by users to check personal information, view accounts and stay in touch with peers. Students use It to erroll in courses, check grades, view financial aid, and view billing accounts. Faculty can use the portal to see class rosters, communicate with students and post grades.
Need help with your account?	What's Inside? 💐 Registration, grades, academic profile, transcripts, financial aid, pay fees & more
LOGIN clear Important "Don't forget to sign out when finished. Never leave your Trailhead session unattended."	Password Change Note After you change your password, wait at least ten minutes before you log into Trailhead. It takes up to ten minutes after a password change for the change to be propagated to Trailhead.
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3. Under the tab labeled **Trailhead**, click on the **OnBase** icon under the *Go Bar*.





4. 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.



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

Document Retrieval	OnBase	☆ 🖂	Vanessa Rael 🗸
Document Types Q ADMISSIONS AD-Admissions Application AD-College Transcripts (Official) AD-College Transcripts (Unofficial) AD-Correspondence 0 SELECTED Document Date Search Type KEYWORDS TEXT NOTES	• • • • • • • • • • • • • • • • • • •		
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5. Click on the three bars at the top left corner of your screen and select New Form.





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6. The New Form tool will open. Click on the **AA-DH Evaluation Form** under Academic Affairs.



7. The form will open on the right-hand of your screen and your information will populate on the evaluation form. Proceed with filling out the form, using the information from your FDR.

AA-Department Head Evaluation Form

Department Head Information			
First Name*		Last Name *	
Email Address *		Department (Banner Home Org) * Humanities Arts & Social Sciences	
Rank * Emeritus Teaching Ranks			
Dean Information			
Last Name 🔍 *	First Name*	DH E	Email Address *

8. To save your work, 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.



9. Once your form has been saved, a popup window will appear asking if you would like to complete another form. Click **No**.





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After clicking No, the form will no longer appear on your screen.



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

Re-accessing your Department Head Evaluation draft in Workflow (*Navigating to your saved evaluation in the OnBase Web Client*)

Perform the following steps to access your Department Head Evaluation draft in workflow (Dept Head Evaluation Draft Queue).

1. After logging into the OnBase Web Client, click on the three bars at the top left corner of your screen and select **Open Workflow**.

Document Retrieval			
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DOCUMENT Document Retrieval Custom Queries New Form WORKFLOW Open Workflow			
USER			
Mailbox	Nothing to display	y	
Locked Objects ADMIN Open Administration			

a. A popup window will appear. Click on the carrot next to AA2: Department Head Evaluation Workflow and click on AA2: Department Head Evaluation Draft Queue.



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

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	NAME		
LIFE CYCLE VIEW WORK FOLDE	R ∇ Contains		
		INFORMATION & TECHNOLOGY SOLUTIONS	
No items to display			
	Items: 1		
Items: 0 Template: None	Draft Is Complete Route to supervisor		
AA-Department Head Evaluation Form			
Department Head Inform	nation		
First Name*	_	Last Name *	

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.





Re-accessing your Department Head Evaluation draft in Workflow (Using emailed link)

To access your Department Head Evaluation draft using the link provided in your submission email (Dept Head Evaluation Draft Queue), perform the following steps.

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

From academic-affairs@mines.edu <academic-affairs@mines.edu> See: Tuedady, January 25, 2022 L102 AM To Badded: Department Head Evaluation Form Draft Awaiting Submission</academic-affairs@mines.edu>
The Department Head Evaluation Form you started is still in the draft format. Please review and make any pressent changes. To access the Department Head Evaluation Form, copy and paste the following link in a new web browser wind Controst/Conbastetstweb.mines.edu/APPNET/Workflow/WFLogin.asox?LifeCycleID=1338QueueID=2398QootD=209884
You can continue saving drafts of your evaluation by clicking the "Save Evaluation" button at the bottom of the form. Retain this email and use the link provided to access the draft evaluation until it is submitted to the supervisor.
If you are unable to view/modify the evaluation please wait 15 min and try the link again.
Once complete:
1. Click the "Save Evaluation" button at the bottom of the form
2. Click the "Draft is Complete Route to supervisor" button to route the Department Head Evaluation Form to the Dean.
Thank you!
Mines Department Head Evaluation Form QUESTIONS: For questions or additional information regarding the Department Head Evaluation process, please contact Jennie Kenney by email at kenney@mines.edu or phone at 303-273-3399.
Mines OnBase QUESTIONS: For issues or technical support regarding OnBase, please submit a ticket to the OnBase Support Team.

- 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.

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	AA	-Dept Head Evaluations fo	TECHNOLOGY SOLUTIONS
No items to	display		
	lten	ns: 1	
		Draft Is	
ems: 0 Template: 1	None	Route to	
remplate. I	None	supervisor	

4. Upon opening the evaluation, you can proceed with filling out the remainder of 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.



Submitting your Department Head Evaluation to the Dean in Workflow (within the Dept Head Evaluation Draft Queue)

Perform the following steps to submit your Department Head Evaluation to your Dean using the Dept Head 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 Department Head Evaluation to your Dean.

OnBase [•]	수 📰)	Inbox
	mr	Drag a column header here to group by that column.
	LU 40	NAME
LIFE CYCLE VIEW	WORK FOLDER	Contains
		AA-Dept Head Evaluations for & & ECHNOLOGY SOLUTIONS
No items	s to display	
		Iteas.1 Draft Is Call Complete
Templ	ate: None	Route to supervisor

AA-Department Head Evaluation Form

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

- 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 Dean 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.

