

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.

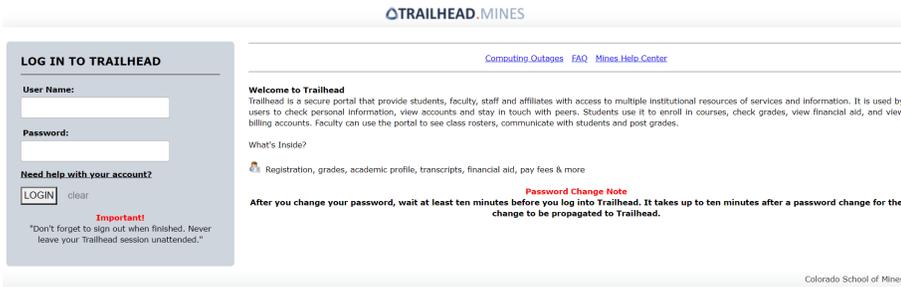
Accessing and Saving the Department Head Evaluation form (Initial save)

To access the Department Head Evaluation form, perform the following steps to login to the OnBase Web Client.

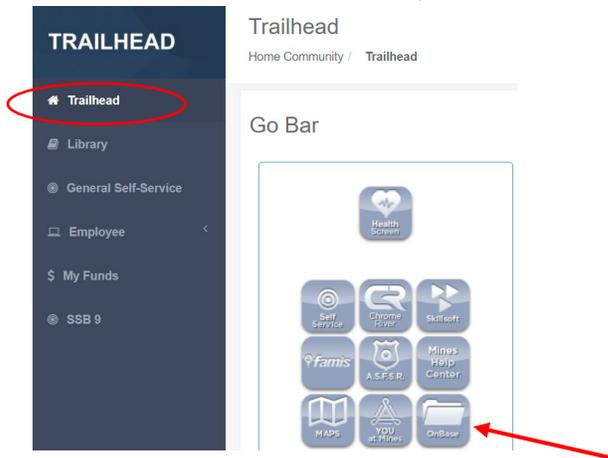
1. Double click on your preferred internet browser icon to launch the browser.
(Recommended: Chrome).



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



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



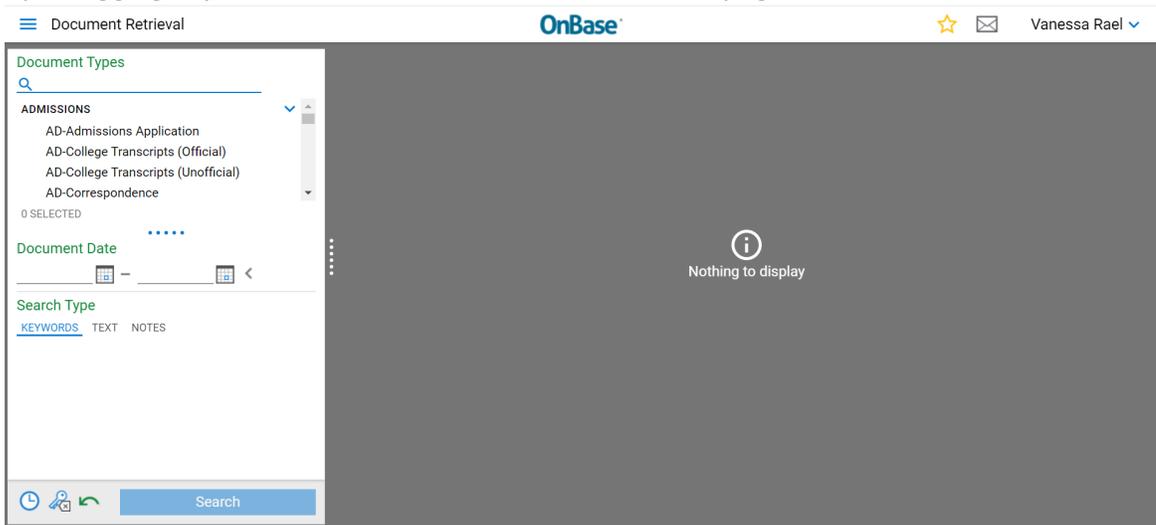
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4. You will be redirected to an OnBase login page. Login using your **Multipass credentials**. This is the same *username* and *password* you use to log into your email, Trailhead, etc.

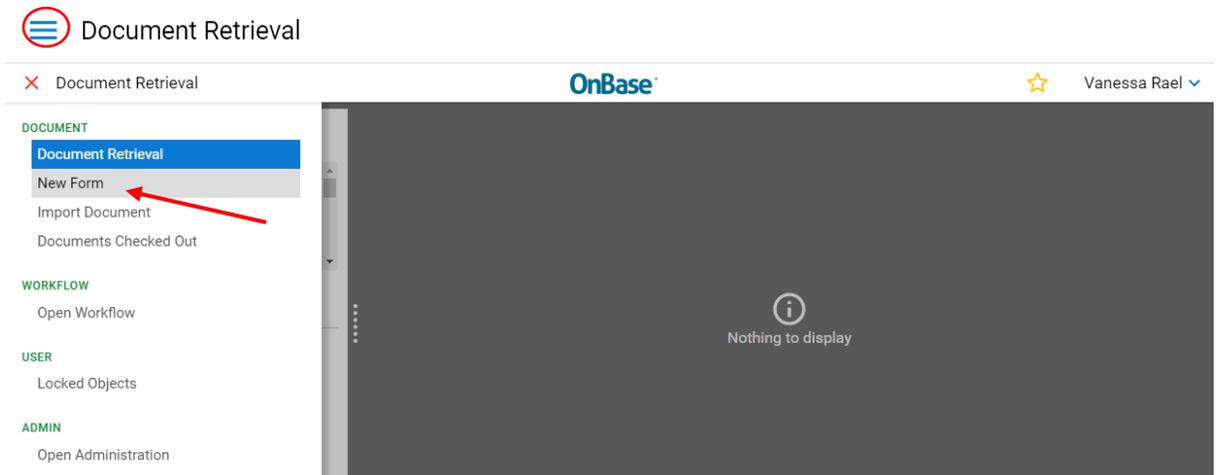


ADIT.MINES.EDU
User name
Password
Login

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



5. Click on the three bars at the top left corner of your screen and select **New Form**.



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



- 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.

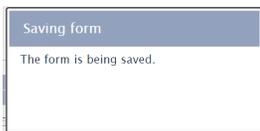
AA-Department Head Evaluation Form



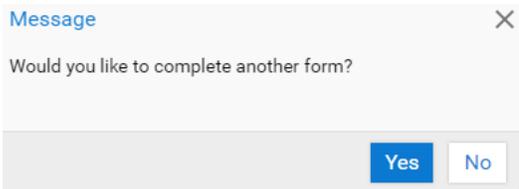
- To save your work, click the **Save Evaluation** button at the bottom of the page.

Save Evaluation

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

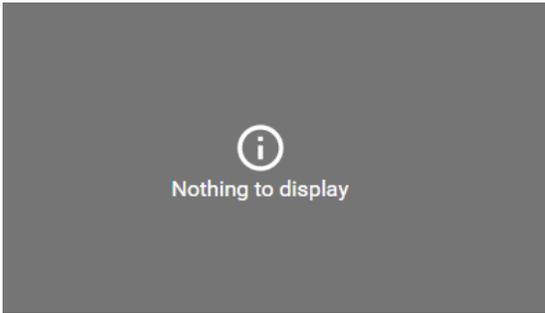


- Once your form has been saved, a popup window will appear asking if you would like to complete another form. Click **No**.



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

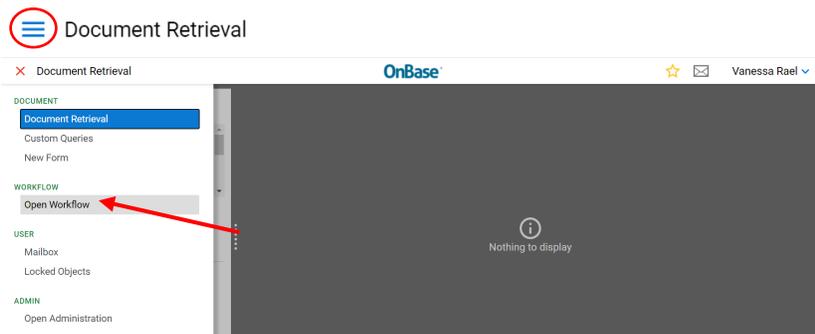


- To return to the draft form to make further changes, see the following sections:
 - **Re-accessing your Department Head Evaluation draft in Workflow (Navigating to your saved evaluation in the OnBase Web Client)**
 - **Re-accessing your Department Head Evaluation draft in Workflow (Using emailed link)**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

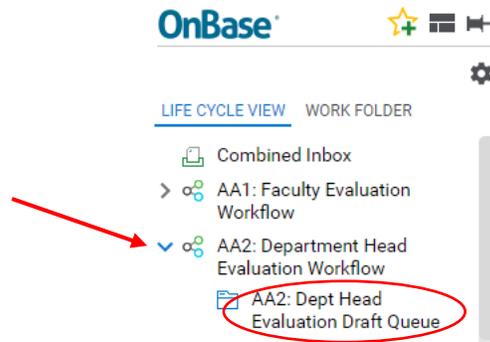
Perform the following steps to access your Department Head Evaluation draft in workflow (Dept Head Evaluation Draft Queue).

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**.

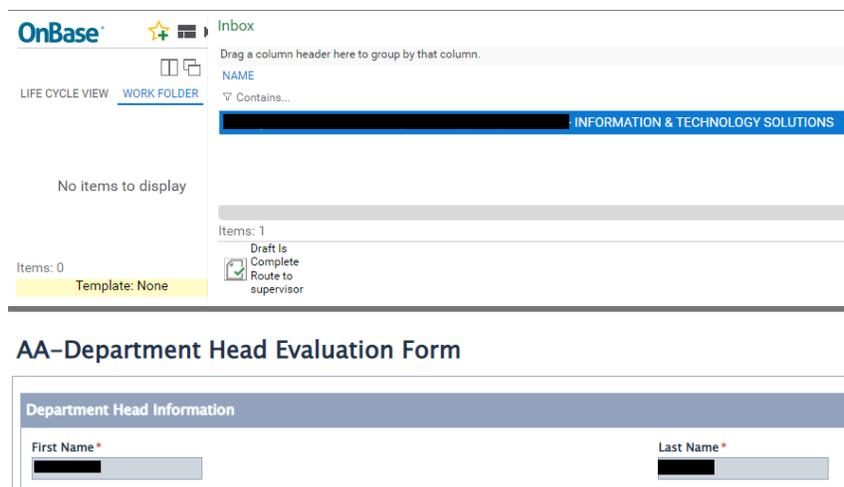


- a. A popup window will appear. Click on the carrot next to *AA2: Department Head Evaluation Workflow* and click on **AA2: Department Head Evaluation Draft Queue**.

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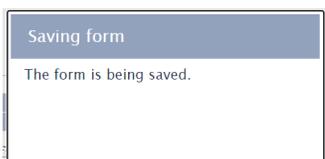
- b. Click on your evaluation in the top right-hand window, and the evaluation will open in the window below.



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.

Save Evaluation

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

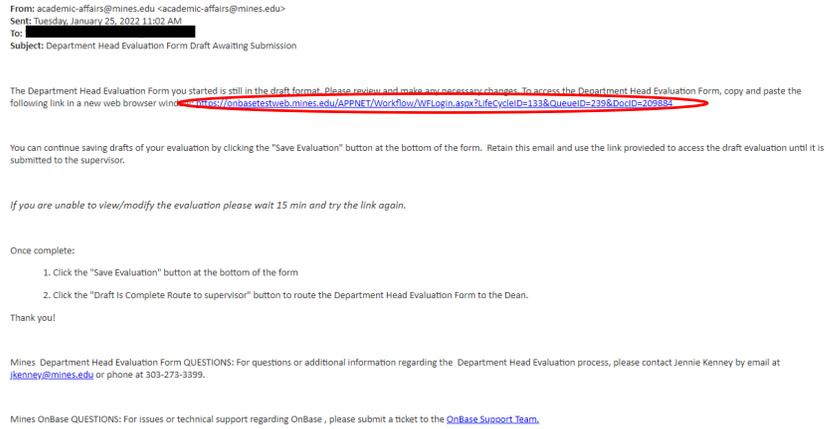


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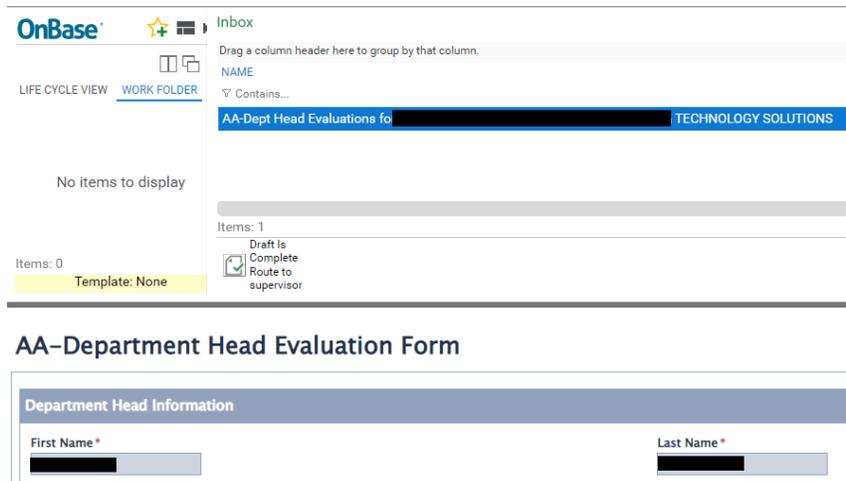
Re-accessing your Department Head Evaluation draft in Workflow (Using emailed link)

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.



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 remainder of the form. After completing your evaluation, click the **Save Evaluation** button at the bottom of the page.

Save Evaluation

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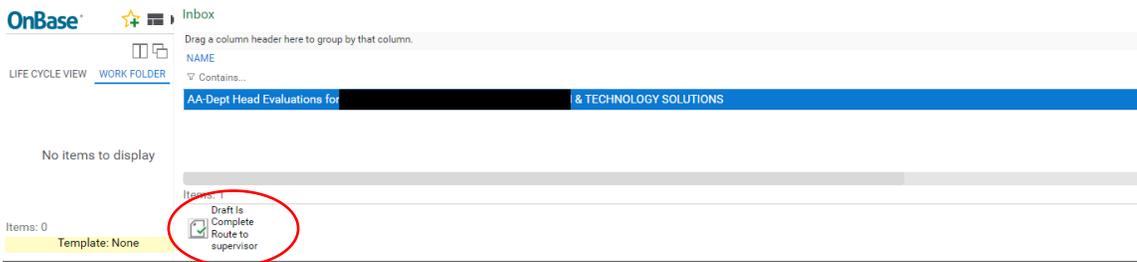
5. After clicking the Save Evaluation button, a popup window will appear showing that the form is being saved.



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.



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.