Course Exception Request Process: Access and Workflow Overview for Department Approvers

This guide instructs department approvers on how to access the Course Exception workflow via Trailhead and approve/deny requests.

Accessing the Course Exception Workflow

There are two ways to access the Course Exception workflow:

- A) Workflow notification link
 - 1. Following a student's submission of a Course Exception request form, the OnBase workflow will initiate an email notification to the identified department approver for the request.

	Thu 12/2/2021 1:08 PM
	registrar@mines.edu
	Degree Requirement Exception Requested for
То	
Dear Approv	er,
	has requested an exception to a degree requirement. Please review request and take the appropriate action, based on approval or denial.
Program: BS	MAJOR: CRE - Chemical Engineering
Current Cata	log Degree Requirement: CBEN 300
Requested C	ourse to Replace Catalog Requirement: CBEN430
Click on the	ollowing link (or copy and paste into your browser) to access the workflow in OnBase.
https://onba	se.mines.edu/APPNET/Workflow/WFLogin.aspx?LifeCycleID=131&QueueID=225&DocID=209291
Colorado Sch	ool of Mines
Office of the	Registrar
1812 Illinois	St. Golden, Colorado 80401
303-273-320	0 registrar@mines.edu
O CO	LORADOSCHOOLOFMINES

2. Click on the link provided in the email (or copy and paste into a web browser) to navigate to the OnBase Web Client. Login to the using your **Multipass credentials**. This is the same *username* and *password* you use to log into your email, Trailhead, etc.



~	
Ľ,	User name
A	Password

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OnBase Quick Reference Guide

3. After logging in, you will be directed to the RG3-Degree Requirement Exception workflow.

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	may	Drag a column header here to group by that column.	
	ШЮТ	NAME	ENTRY DATE
LIFE CYCLE VIEW WORK FOLDER		♥ Contains	∀ On
		- UG - BS, MAJOR: CRE - Chemical Engineering - CBEN 300 - Pending Review	12/2/2021 1:07:51 PM
No items to display			
Itomo: 0		Approve Request	
Template: None		UG Request Denied Registrar Review	
RG-Degree Requirement	t Exceptio	on Form	

Form Processing Details		
Student Information Section		
Student CWID		
Student First Name	Student Last Name	Student Email Address

- B) Directly accessing 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> **OTRAILHEAD.**MINES

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 theck personal information, view accounts and stay in touch with peers. Students use it to enroll in courses, check grades, view financial aid, and view
Password:	billing accounts. Faculty can use the portal to see class rosters, communicate with students and post grades. What's Inside?
Need help with your account?	👌 Registration, grades, academic profile, transcripts, financial aid, pay fees & more
LOGIN clear Important!	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.
"Don't forget to sign out when finished. Never leave your Trailhead session unattended."	
	Colorado School of Mines

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-Correspondence 0 SELECTED Document Date	:		
Search Type KEYWORDS_TEXT_NOTES	Nothing to display		
Search			

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





6. Workflow will open in a popup window. Click on the carrot next to *RG3-Degree Requirement Exception* workflow to view the workflow queues.



Note: As department approvers, you will only have access to see the UG Exception Review <i>Queue.



OnBase Quick Reference Guide

UG Exception Review Queue

This workflow queue is used by department approvers to review and approve/deny course exception requests from undergraduate students. Once review is complete, this queue allows department approvers to route questions to the Registrar's Office, approve requests, or send a note to students regarding denied requests.

1. Select the UG Exception Review Queue



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

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	Drag a	a column header here to group by that column.	
		E	ENTRY DATE
IFE CYCLE VIEW WORK FOLDER	∀ Cor	ontains	∀ On
		- UG - BS, MAJOR: CRE - Chemical Engineering - CBEN 300 - Pending Review	12/2/2021 1:07:51 PM
No items to displa	iy 👘		
	ltems:	s: 1	
ems: 0		Approve Request Request Registrar	
Tananlata, Mana		Denied P Registral	
C-Degree Requiren	nent Exception Fe	Request I Denied Review	
G-Degree Requiren	nent Exception Fo	Request 🖾 Denied 🔝 Review	
Template: None RG-Degree Requiren Form Processing Details Student Information Section	nent Exception Fo	Request 🖾 Denied 🔝 Review"	
Form Processing Details Student Information Section	nent Exception Fo	Request 🔯 Denied 🔯 Review"	
Form Processing Details Student Information Section Student CWID	nent Exception Fo	Request 🖾 Denied 🔝 Review"	
Form Processing Details Student Information Section Student CWID Student First Name	nent Exception Fo	Request 🖾 Denied 🔝 Beview	
Form Processing Details Student Information Section Student Eirst Name	nent Exception Fo	Request 🚺 Denied 🖬 Review*	

3. The department approver should review the request form, and select an option of **approve** request, **decline** request, or **request requires more information** in the Processing Details tab.

	Form	Processing Details]
	Status	v	Review Type Pending Review *
×	Please sel Approv	lect an option below: ve Request Decline Re	iquest 🔘 Request requires more information

If request is denied, a reason must be documented in the "Reason for Declining request" section of the form. The reason will be included in an automated notification to students.



OnBase Quick Reference Guide

NOTE: Any communication with the student (other than denial reasons) must be done outside of workflow (i.e. email, meeting, etc.).



4. Document notes and/or communication with Registrar staff via the Processing Notes section on the Processing Details tab.

Form Processing Details	
Status Review Type v Rending Review v	
Please select an option below: Approve Request O Decline Request O Request requires more information	
Processing Notes (optional)	
Notes:	

5. Before selecting a user action, click the **Save Changes** button at the bottom of the screen.

Save Changes

6. Once review is completed, navigate to the center of your screen and select one of the following user actions:



- * Be careful to select the appropriate User Action matching the approval/denial status
 - a. **Approve UG Request:** Approved requests will be routed to the Registrar team for processing. A confirmation email will be sent to the student once processing is complete.
 - b. Request Denied: Denied requests initiate an email notification to the student, detailing the reason for the denial. A description of the reason for denial must be documented in the "Reason for Declining request" section of the form.
 - c. **Request Registrar Review:** Department approvers can use this action to send the request form to the Registrar team for assistance. Notes and/or questions must be documented in the Processing Notes section of the form.



 After a user action is selected, the request form will still appear in your queue. To refresh your workflow queue, navigate to *Life Cycle View* on the left-hand side menu and reselect the UG Exception Review Queue.



The request form you just routed will no longer display. Proceed with steps 2 and 3 to review any remaining request forms in your queue.

