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 [redacted]
To [redacted]

Dear Approver,

[redacted] 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 Catalog Degree Requirement: CBEN 300
Requested Course to Replace Catalog Requirement: CBEN430

Click on the following link (or copy and paste into your browser) to access the workflow in OnBase.
https://onbase.mines.edu/APPNET/Workflow/WFLogin.aspx?LifeCycleID=131&QueueID=225&DocID=209291

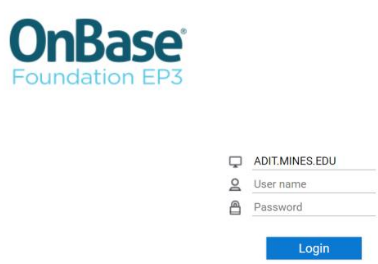
Colorado School of Mines

Office of the Registrar

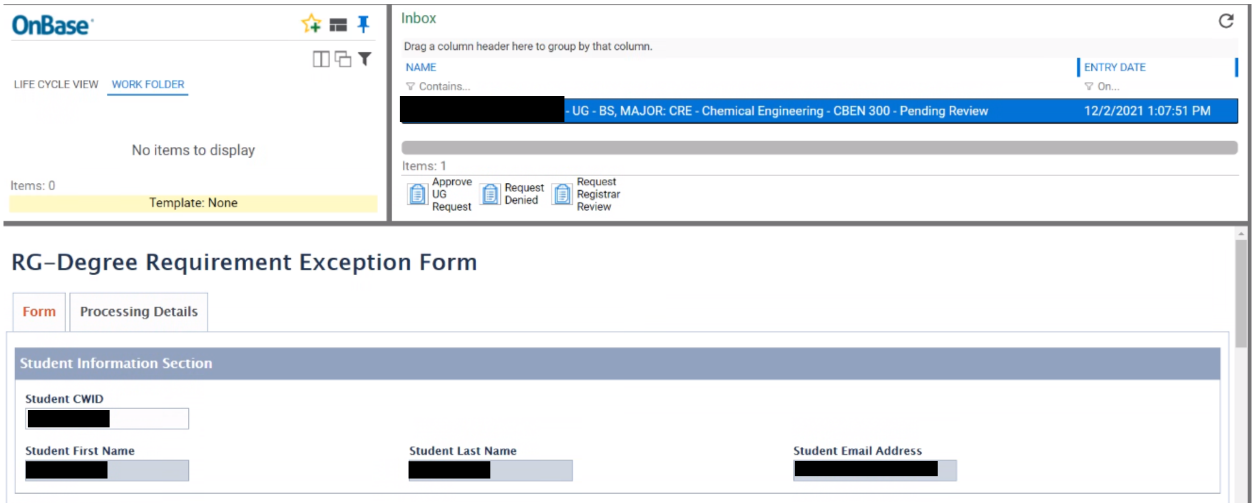
1812 Illinois St. | Golden, Colorado 80401

303-273-3200 | registrar@mines.edu

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.



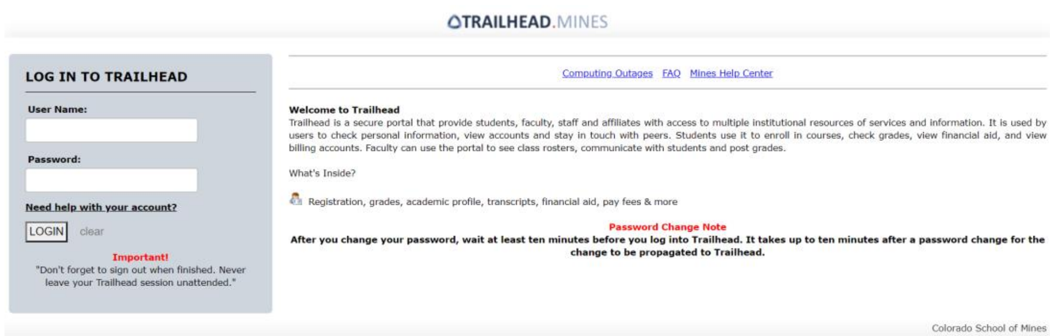
3. After logging in, you will be directed to the *RG3-Degree Requirement Exception* workflow.



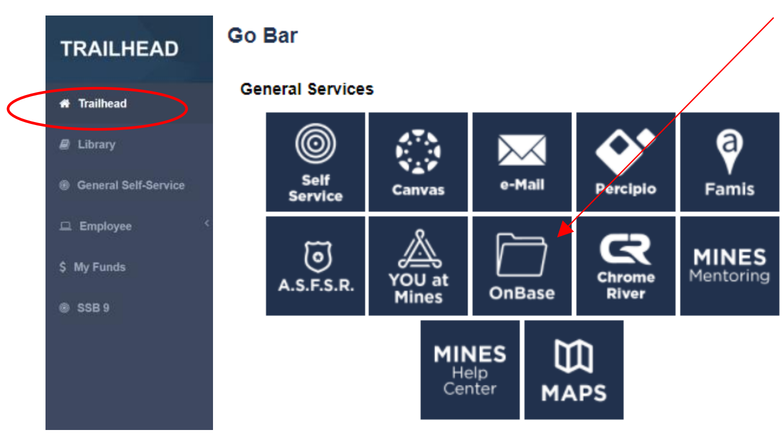
B) *Directly accessing the OnBase Web Client*

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

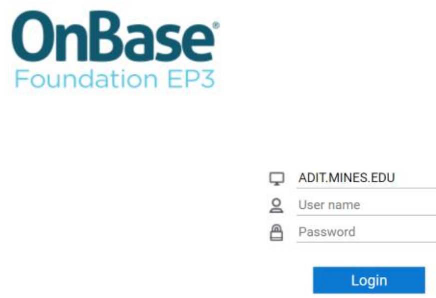
2. Navigate to Trailhead and login using your **Multipass credentials**: https://trailhead.mines.edu/



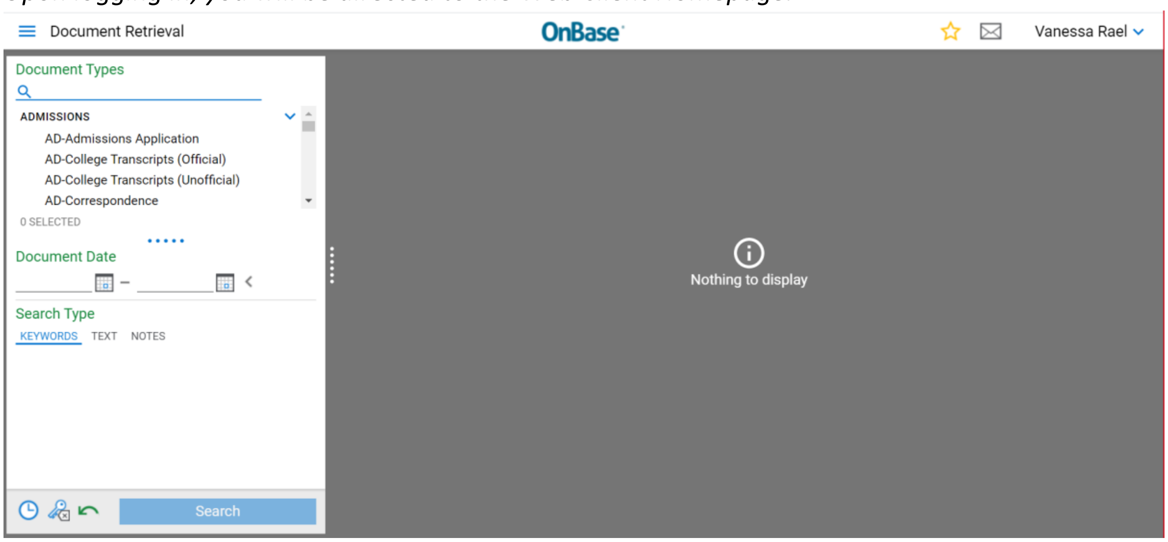
3. Under the tab labeled **Trailhead**, click on the **OnBase** icon under the *Go Bar*.



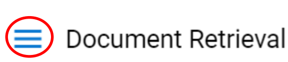
4. You will be redirected to an OnBase login page. Login using your **Multipass credentials**. This is the same *username* and *password* you use to log into your email, Trailhead, etc.

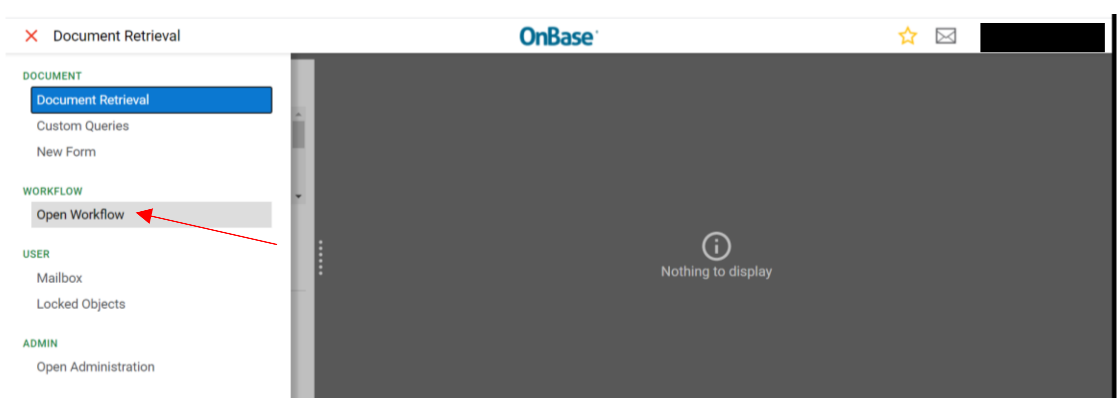


Upon logging in, you will be directed to the Web Client Homepage.



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





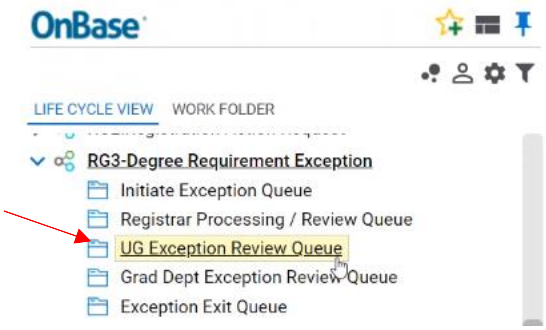
6. Workflow will open in a popup window. Click on the carrot next to *RG3-Degree Requirement Exception* workflow to view the workflow queues.

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

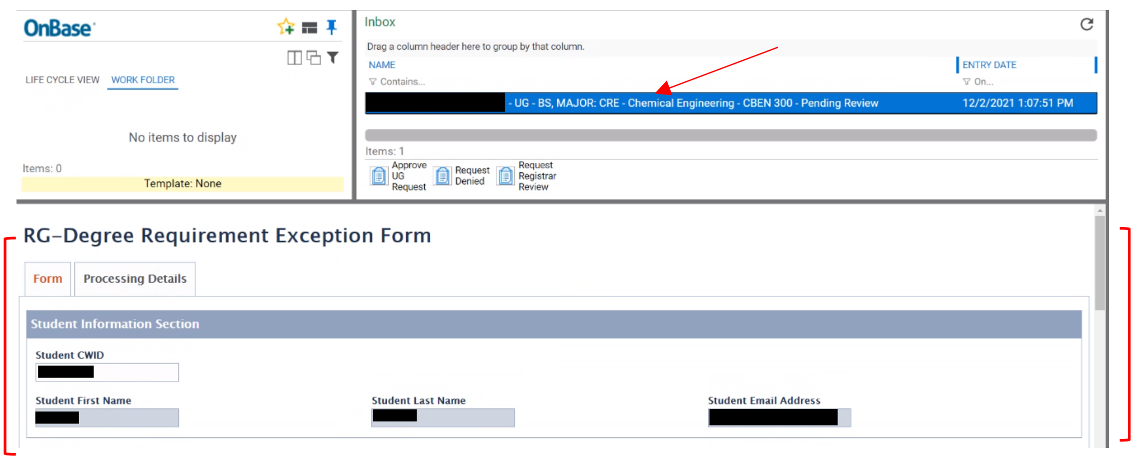
UG Exception Review Queue

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:



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.

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.

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.

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

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

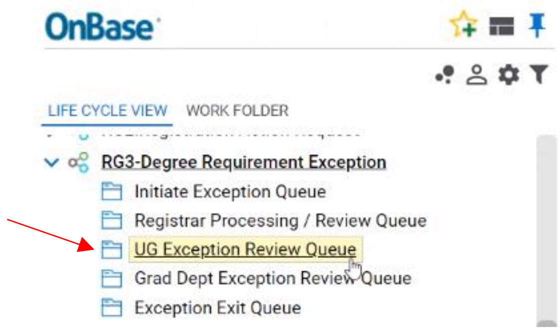
* <u>Be careful to select the appropriate User Action matching the approval/denial status</u>

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.

7. 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.
