## Must know before continuing

Use the <u>most recent version</u> any of the following browsers: PC: Internet Explorer, Firefox, or Chrome Mac: Firefox or Chrome.

- Internet Explorer (11)
- Chrome (61+)
- Firefox (53+)
- Firefox ESR (45)
- Safari (6.2.x, 7.1.x, 8.0.x, 9.0.x, 9.1.x)

Please disallow popup blockers on your computer when using the OnBase system for this process. If you do not know how to disable popup blockers on your browser, please contact the helpdesk at x3350.

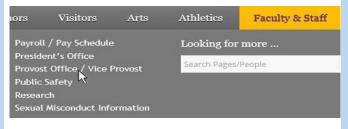
You must have your employee ID and your WCU username/password to proceed.

NOTE: If this is your first time working as a reviewer for the Tenure and Promotion process, please notify <u>onbasesupport@wcupa.edu</u> as soon as possible to ensure no delays in processing.

NOTE: You only have until your access end date to make your recommendation. Once the deadline has passed, you must contact the TeP Committee Chair to record your recommendation.

## Steps to Access OnBase

From WCU's website, select *Faculty & Staff* from the main menu and then select *Provost Office*.



## Click on Forms and Policies from the sub-

menu.

Forms and Policies 💦

Click on Tenure Promotion submission process.

Under Reviewer Links click on the *Reviewer User Guide* to assist with the review process. Click on the *Access the OnBase Web Client* link to proceed.

Reviewer Links

Instructions for Reviewing Tenure and Pro

• Reviewer User Guide 🎴

Access the OnBase Web Client



## Navigate to your workflow queue

Click on the pulldown menu to the left of the current option. Document Retrieval is the default display.



Select "Open Workflow" from the dropdown options. A new window will

open with the Workflow interface.



Document Retrieval

#### DOCUMENT

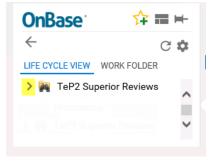
- Document Retrieval
- Custom Queries New Form
- Import Document
- Batch Indexing
- Documents Checked Out
- Briefcase

#### WORKFLOW

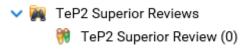
**Open Workflow** 

# Click on the triangle to the left of *TeP2* Superior Reviews to expand the queue





Click on the *TeP2 Superior Review* queue to see your assigned documents.



# Review Documents

Double click one of the candidates from your inbox.

TEP REVIEW FORM STATUS	group by that column.	FIRST NAME	LAST
♥ Contains	♥ Contains	♥ Contains	⊽ Con

The review form is displayed in the viewer, but associated documents are available via the work folder on the left.

OnBase + III + Work Folder		Index Drug a column header here to g TTP-MENE WE COMMISSIONS T Contains.	pous by that colume.	Testi kami T Containa	LASE NAME → Contains	Dontains	Castern som	C Contra T Sertama.
Engle onlives handle here to group by thet observe SOCIABLY TANKE < Contains. C1: TEAURE COLLY TO <sup>R</sup> Application for 1 1/70/2018 BP: OEPT COMMITTEE DISERVATION for ( FAUL 2019	I	INCOMPLETE				TENURE	ASSISTANT PROFESSOR	COLOF BUSINE MONT
05 DEPT DOMMITTLE DOSERVATION for ( * **** ender forms: 90 Filter: WF: ToP Belated Items		Constant			_		Primary	> Viewer
TeP Superior Review F	or	le Ga	d Norre neat Eask SSTANT PROFESSOR		Land 1	Tarra		
Hease record a recommendation, mark the Recommendation *	dato,	and upload a recommendatio	e letter below. Click sare	r. When you are ready to	submit your recommendaries	n, dick the submit task abov	s.	
Tel' Reviewer Rec Letter* Attack Lef' Reviewer Rec Letter								
ALLE IN ADDRESS OF LIGHT								

Double click on the work folder documents to display them in another window for review with the separate window enabled.



The work folder offers a dropdown to display the appropriate documents you

wish to view.

LIFE CYCLE VIEW WORK FOLDER



TePB CV, SOE, DTSM TePD Narratives TePE Annual Evals TePF Student Evals TePG Obs TePH Supplemental TeP All

## Make a recommendation

When you are ready to complete the Recommendation, select the candidate with the *TeP Review Form Status* = INCOMPLETE.

On the form, use the dropdown to indicate the recommendation.



If applicable, attach your recommendation letter using the attach button on the form.

TeP Reviewer Rec Letter\*

Attach TeP Reviewer Rec Letter

Sign the document on the signature field using your mouse or your finger if you have a touchscreen. Be sure to add the current date in the date field.

Signature \*



Once you have filled out and saved the Review Form, you must indicate that it is complete by clicking on the *Complete* button.

<u>NOTE: This will email a copy of the</u> <u>Recommendation Letter to the Candidate.</u>

## Deans Only TENURE Review Letters

Deans will now have access to review letters for **Tenure candidates only**.

To access the Tenure review letters, click on the pulldown menu to the left of the current option. Document Retrieval is the default display.

Document Retrieval

Select "Open Status View" from the dropdown options. A new window will open with the Status View interface.

≡ StatusViev	V
DOCUMENT	
Custom Querie	S
WORKFLOW Open Workflow	1
STATUSVIEW	
Open StatusVi	ew

Select the TeP Tenure Review Letters.

Available Layouts Q	
GROUP LAYOUTS	~
TeP Dept Committee, Do nd Dept Chairs	eans, a
✓ TeP Tenure Review Lett	ers

Letters for your review will populate in the right-hand panel.

Custom Query						
EMPLID	FIRST NAME	LAST NAME	DOCUMENT TYPE			
9123451	TEP	CANDIDATE1	TeP Reviewer Rec Letter			

Click on the candidate's letter to view.