

## Must know before continuing

Use the most recent version 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.

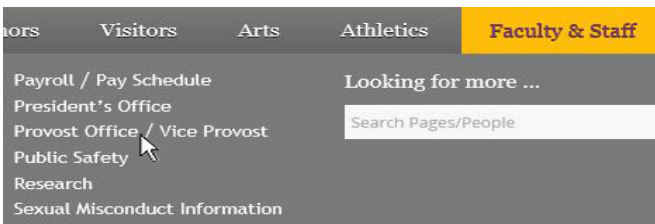
**NOTE: If this is your first time working as a reviewer for the Tenure and Promotion process, please notify**

**[onbasesupport@wcupa.edu](mailto:onbasesupport@wcupa.edu) 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.



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.

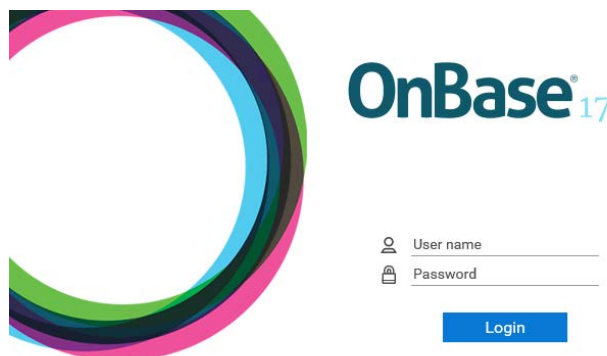
### Reviewer Links

Instructions for Reviewing Tenure and Pro

- [Reviewer User Guide](#)

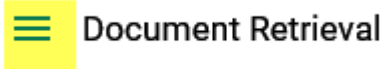
[Access the OnBase Web Client](#)

Enter your WCU username and password



## 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

Document Retrieval

Custom Queries

New Form

Import Document

Batch Indexing

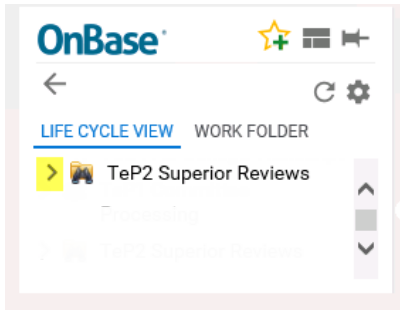
Documents Checked Out

Briefcase

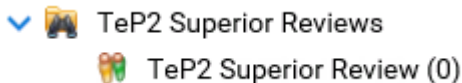
### WORKFLOW

Open Workflow

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

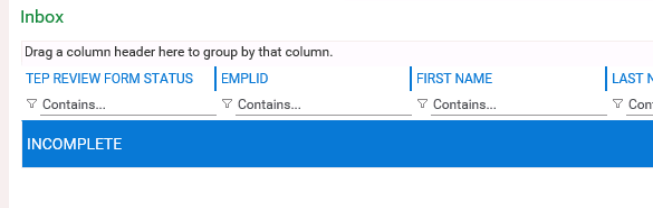


Click on the *TeP2 Superior Review* queue to see your assigned documents.

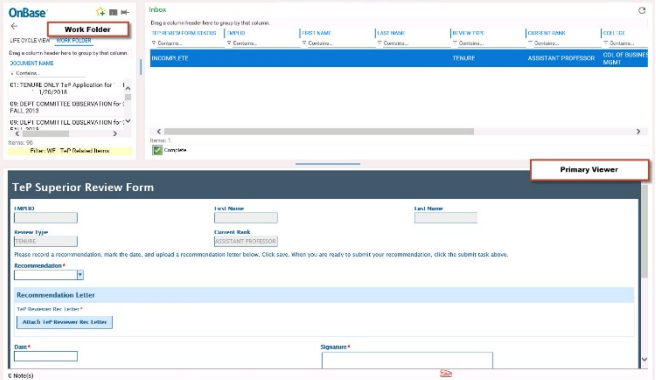


## Review Documents

Double click one of the candidates from your inbox.



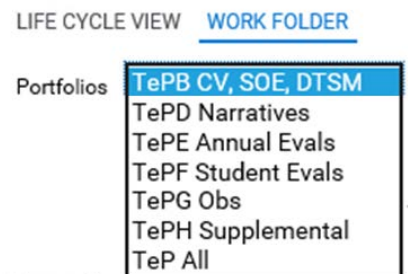
The review form is displayed in the viewer, but associated documents are available via the work folder on the left.



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



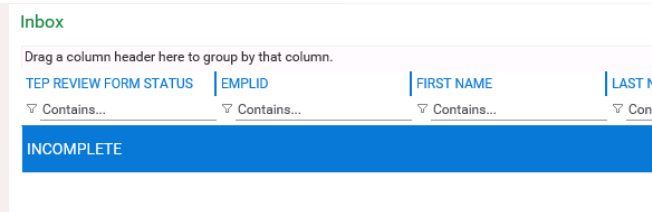
The work folder offers a dropdown to display the appropriate documents you wish to view.



## Upload a 5 year evaluation (Deans only)

**NOTE: For Deans only there is an ad hoc task button to upload the 5 year evaluations for those candidates who qualify to have this considered during the review process.**

To upload the 5 year evaluations, select a candidate from your inbox.



Then, while the candidate is selected, click *Upload Year 5 Evaluation* to bring up the upload screen.



Browse to the evaluation you want to upload and attach it.

## 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.

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 \*

Click to Sign Document

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

Complete

**NOTE: This will email a copy of the Recommendation Letter to the Candidate.**