How to check for Graduate Faculty Appointments in OnBase

The Graduate School tracks Graduate Faculty Appointments (GFAs) in an OnBase **WorkView** application. To facilitate your work with students, the Graduate School has created a role for Graduate Program Administrators. With correct access, you will be able to view GFAs for individuals across campus but will not be able to modify the record.

This access will be helpful in many ways:

- Checking individual faculty members to see if the appropriate GFA is in place
- Comparing to class scheduling for an upcoming semester to be sure appropriate GFAs are in place for all individuals teaching
- Checking committee members to ensure the appropriate GFA is in place prior to exams
- Checking a doctoral student's outside member for the final examination, to ensure that the appropriate GFA is in place
- Checking for GFAs that will expire in an upcoming semester

If you have questions regarding a GFA after viewing the record, reach out to the Graduate School at gradinfo@colorado.edu. If an individual has a GFA in another home department, you may also need to reach out to them directly. Instructions are provided below for those using both the OnBase webclient and the OnBase unity client.

Please do not attempt to edit or update an individual's record. If you have a concern, contact the Graduate School.

Please be aware that you should not be in the *WorkFlow* but the *WorkView* in OnBase.

I. OnBase Webclient: (Unity Client instructions follow in section II)

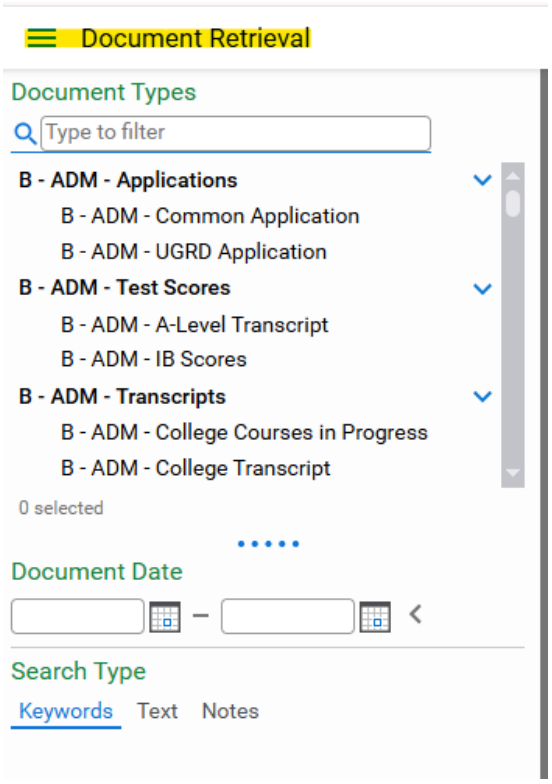
If you typically access OnBase through "Hyland Unity Client program" or an icon on your desktop or in your computer menu, please scroll down to the directions for how to view the records.

A. **Search for an individual GFA**

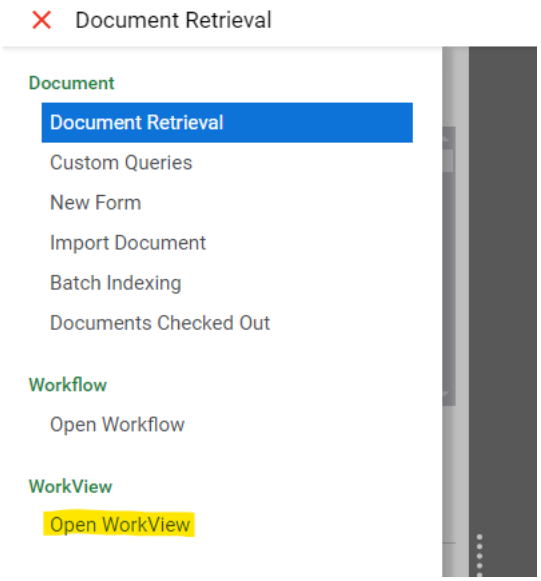
1. Log in to My CU Info and find the OnBase DM Tile under Business Tools. Be sure you are connected to the VPN or CU internet before doing so.



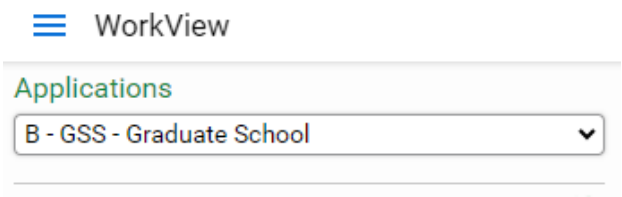
2. The first view you will have is “Document Retrieval”. Select the hamburger menu on the top left.



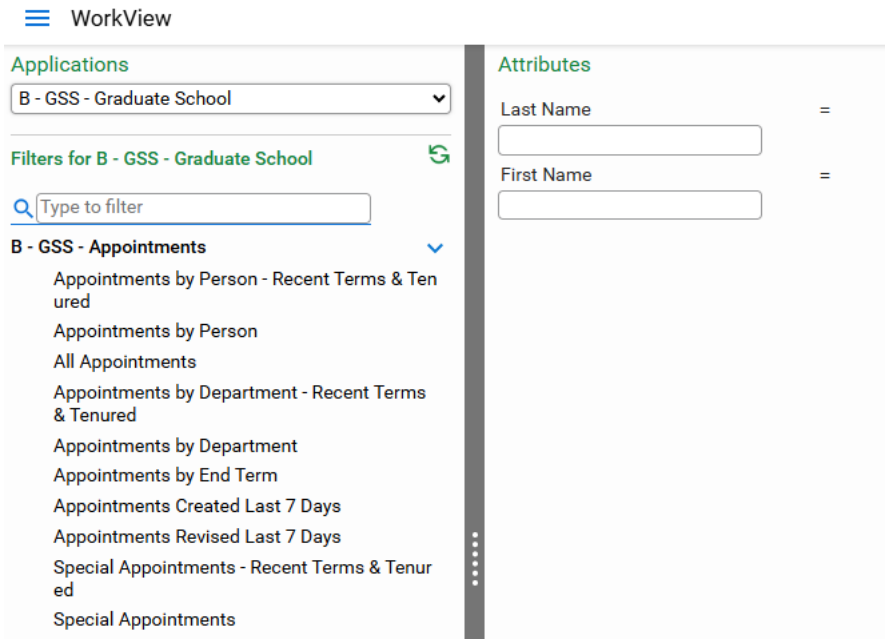
3. In the hamburger menu, select “Open WorkView” under WorkView.
    a. Reminder: WorkView is different from WorkFlow (where you view Candidacy Applications and other GS forms).



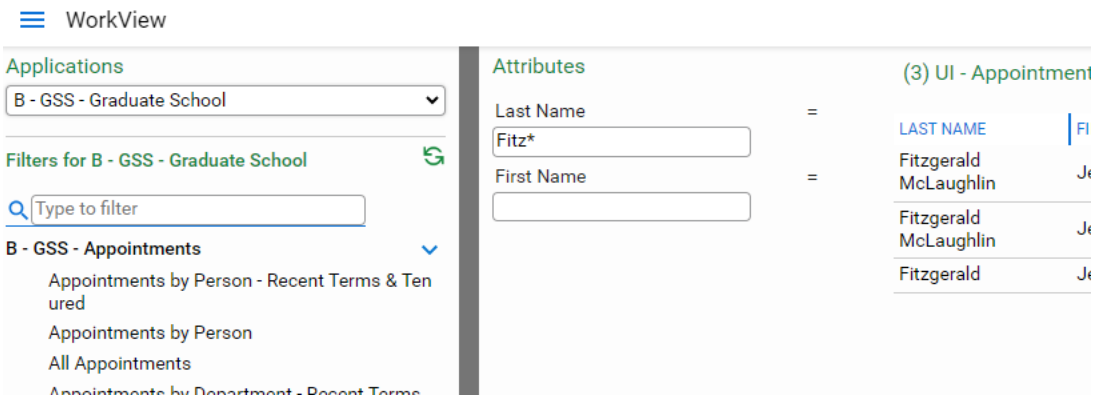
4. In the Applications pull down menu, select “B - GSS – Graduate School”



5. Your final view should look like this:



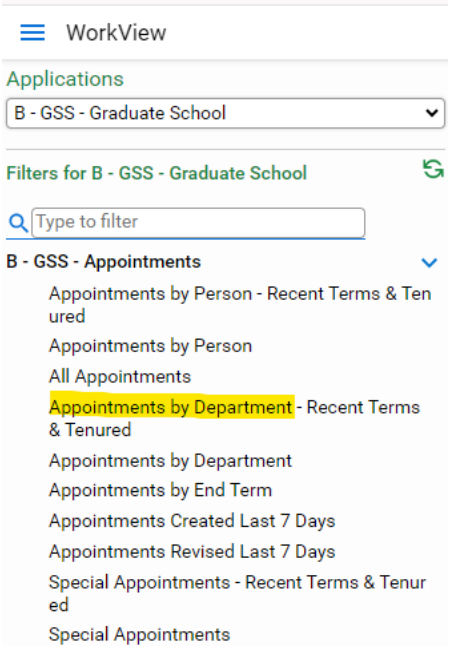
6. You can search for the GFA by Last Name and/or First Name. Please keep in mind that OnBase requires **exact** spelling of names to correctly match the record. If you are only sure of part of the name, use asterisks as "wildcards".
    a. Here is an example: I am looking for the name "Fitzgerald" but am only sure about the first part of the last name "Fitz-". I can search Fitz* and the database will pull up all last names that begin with Fitz.

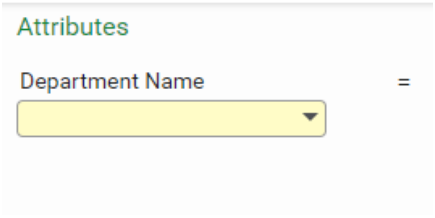


    b. Another way to use asterisks is if you are unsure how the record was submitted. If the last name has two names, the record could appear as St. Lucas or StLucas. This can make it difficult to locate the record. If you use asterisks on both sides of Lucas, i.e. *Lucas*, you will likely find the record you are looking for.
    c. If the individual has changed their name, you may need to search separately using each.
    d. The search is not case sensitive; all caps or lowercase do not affect the search for the record, you can use either.

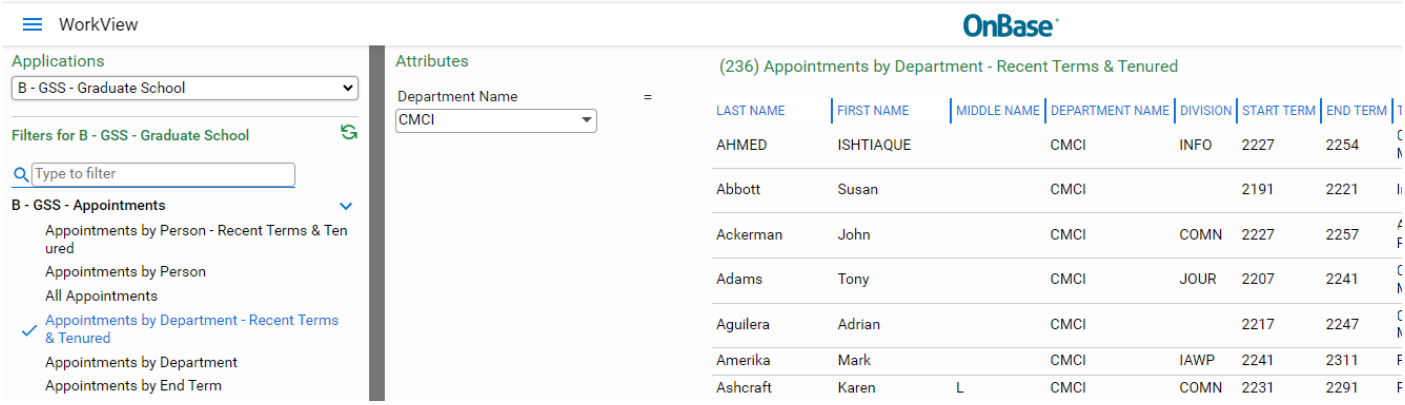
B. **Pull a department/program list**

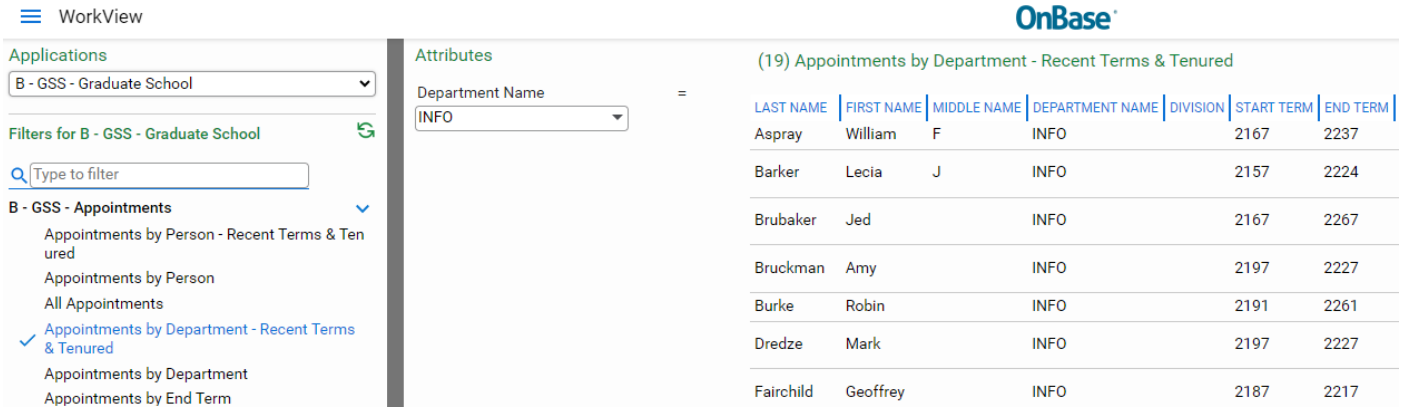
1. Be sure to follow the above steps 1-4 to get to the WorkView, your options should look like below.



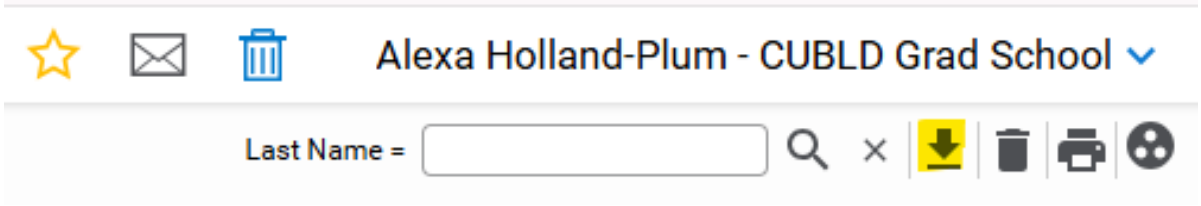


2. You can view appointments by departments or "pull a list" by selecting "Appointments by Department". Then, type the code of the department you would like to see in the Department Name field.
    a. The pull-down menu will not show you the 4 letter department code options, you will need to type in the field "CSEN" or "AAAH" to find the specific GFAs for the department.
    b. Please note that the code you are searching for has to match the department code on the record. Example: CMCI has "CMCI" but also has "INFO" which are different lists of GFAs. Keep in mind that your unit may have many program/plan codes to search for.





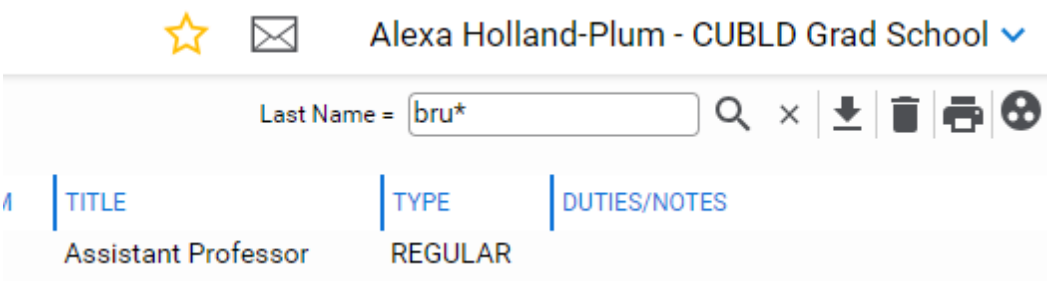
c. You can “pull” the list of GFAs into an excel spreadsheet. The downward arrow button below your name on the right-hand side of the screen will allow you to download an excel file. You may need to select which version of excel to use.



d. You can also print the list directly from this window using the printer icon.
e. If you would like to sort by Last Name or any other field, select the column title to do so. Example: “Last Name” an upwards facing arrow like the below image, would have an ascending order for the Last Name column.

LAST NAME	FIRST NAME	MIDDLE NAME	DEPARTMENT N.
Aspray	William	F	INFO
Barker	Lecia	J	INFO
Brubaker	Jed		INFO

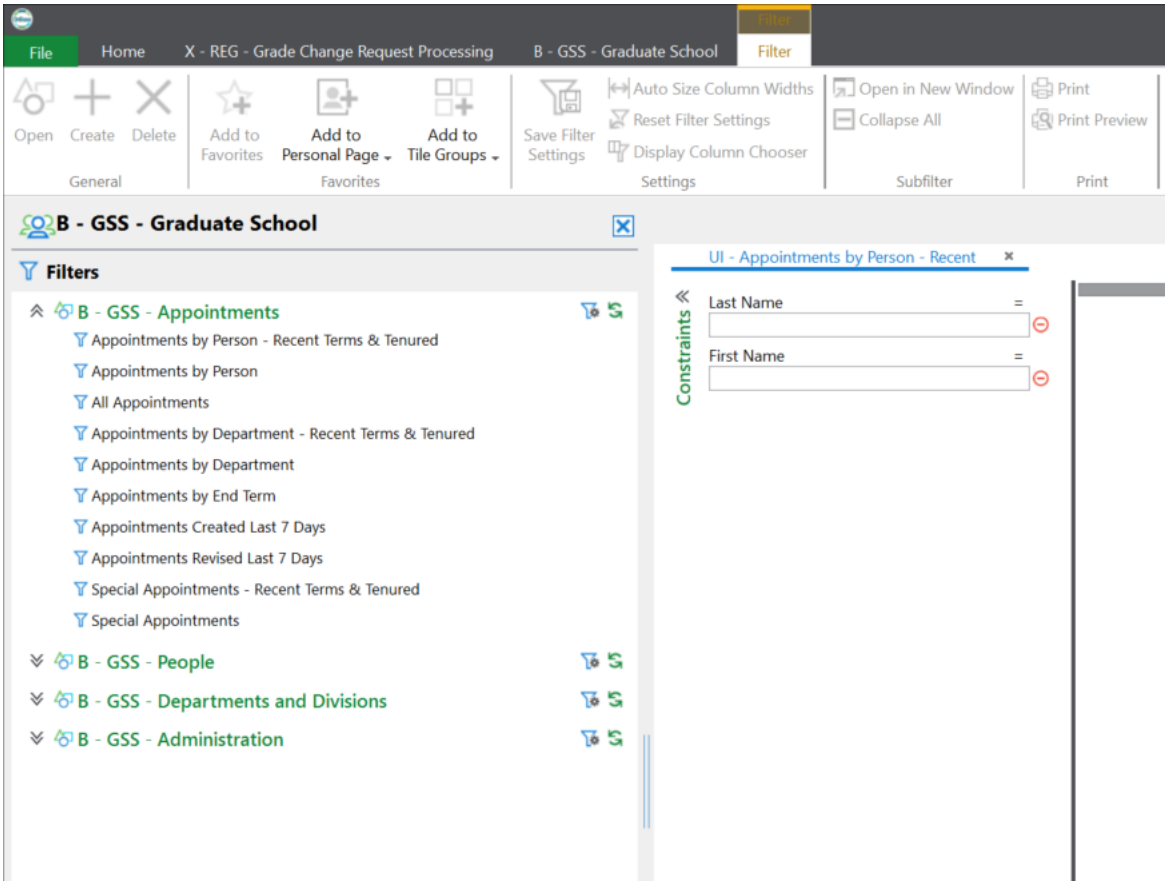
f. You can also search for a Last Name within a department by typing in the last name in the Last Name field below your name. You can use asterisks in this field if you do not know the entire name.



II. OnBase Unity Client:

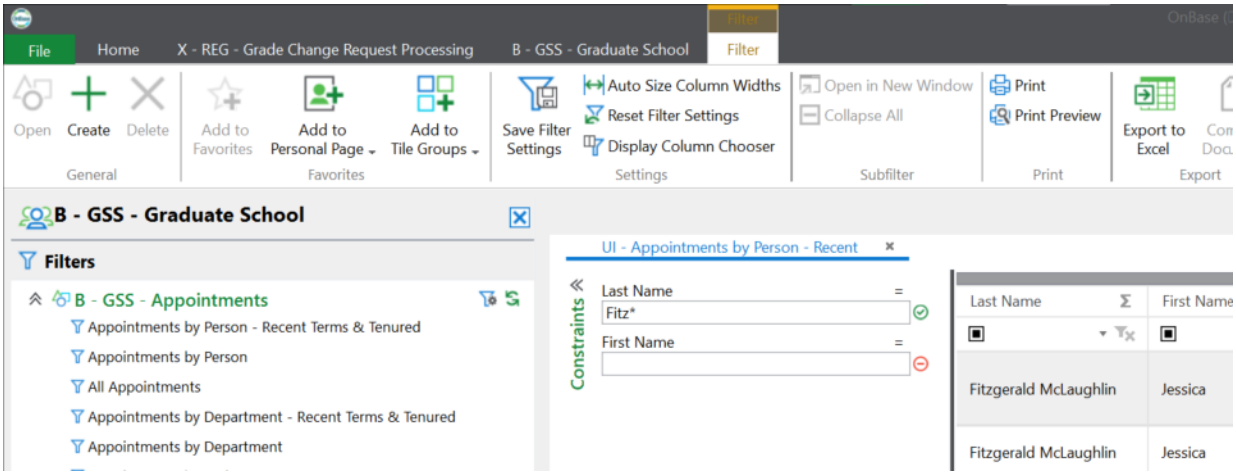
The Unity Client is a program that is available to all CU employees but may be limited to your operating system. If you are interested in the Unity Client as an OnBase option, please follow this OIT guide.

i. Open Hyland Unity Client program aka OnBase.
ii. Go to File > Applications > and select B – GSS – Graduate School
iii. It will bring you to this page:



A. **Search for an individual GFA**

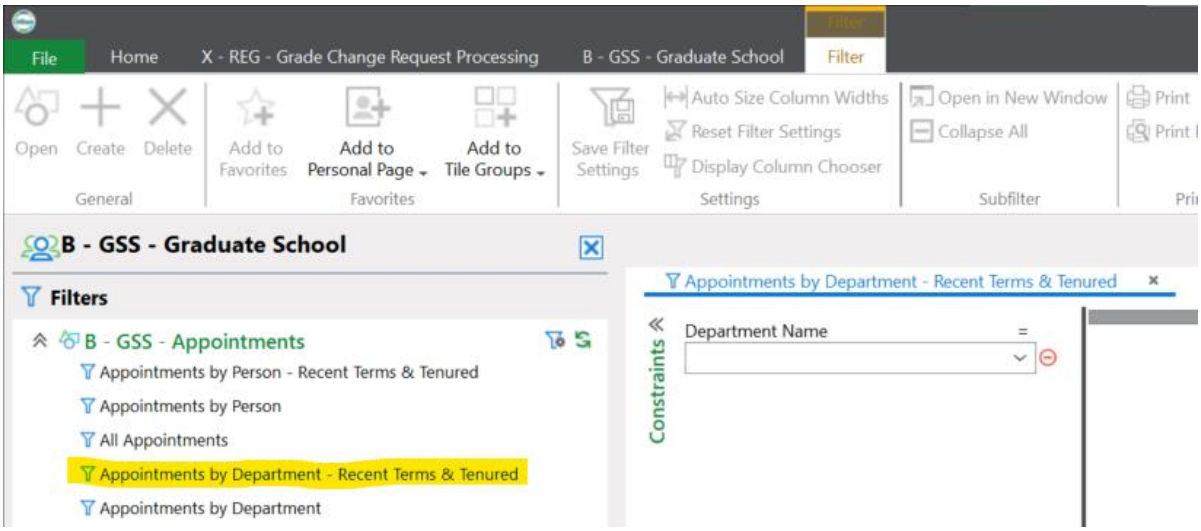
1. You can search for the GFA by Last Name and/or First Name. Please keep in mind that OnBase requires **exact** spelling of names to correctly match the record. If you are only sure of part of the name, use asterisks as "wildcards".
    a. Here is an example: I am looking for the name "Fitzgerald" but am only sure about the first part of the last name "Fitz-". I can search Fitz* and the database will pull up all last names that begin with Fitz.



2. Another way to use asterisks is if you are unsure how the record was submitted. If the last name has two names, the record could appear as St. Lucas or StLucas. This can make it difficult to locate the record. If you use asterisks on both sides of St, i.e. *St*, you will likely find the record you are looking for.
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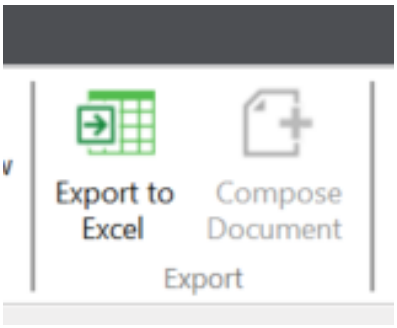
B. **Pull a department/program list**

1. Follow steps i-iii to get to the correct workview.
2. Select “Appointments by Department”



3. The pull-down menu will not show you the 4 letter department code options, you will need to type in the field “CSEN” or “AAAH” to find the specific GFAs for the department.

a. Please note that the code you are searching for has to match the code on the record. Example: CMCI has “CMCI” but also has “INFO” which are different lists of GFAs. Keep in mind that your unit may have many program/plan codes to search for.
b. You can “pull” the list of GFAs into an excel spreadsheet. Just select “Export to Excel” in the Menu bar.



c. If you would like to sort by Last Name or any other field, select the name of the field to do so.