

## Document Retrieval using the OnBase Web Client

This guide instructs Faculty, Department Heads, and Deans on how to view Academic Faculty Evaluations in the OnBase Web Client. Please note the following considerations:

- Faculty only have access to view their own evaluation
- Department Heads and Deans have access to view all evaluations

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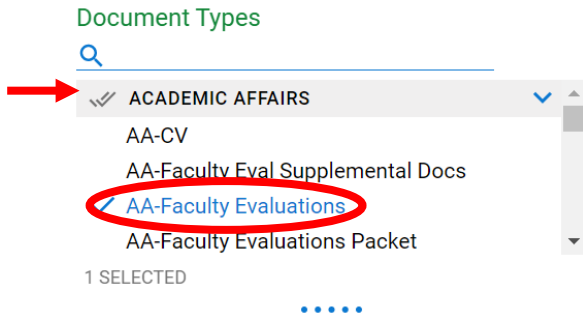
### How to access evaluations in OnBase (outside of workflow)

To access the Academic Faculty Evaluations in OnBase (outside of workflow), Faculty, Department Heads, and/or Deans will perform the following steps.

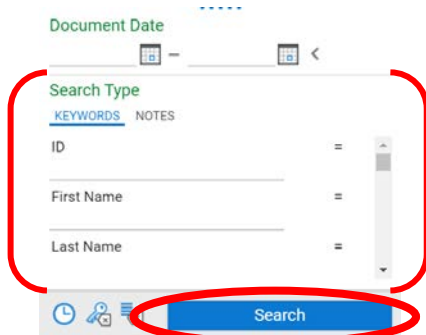
1. Upon launching the OnBase web client, the Document Retrieval tool typically displays as the home screen. If it does not or you need to return to Document Retrieval, use the waffle menu at the top left-hand corner of your screen and click Document Retrieval.



2. Under the **Document Type Group** *Academic Affairs*, select the **AA-Faculty Evaluations** **Document Type**.



3. Enter **search criteria** using various keywords (i.e. name, department, supervisor, etc.) and click **Search**.



# OnBase Quick Reference Guide

4. Search results will appear on the right-hand side of your screen. Results can be filtered by entering additional criteria in the “Contains” search bar. Double-click an evaluation to open it in the bottom window.

The screenshot displays the OnBase Document Retrieval interface. On the left, the 'Document Types' sidebar lists categories such as 'AA-Correspondence', 'AA-CV', 'AA-Faculty Eval Supplemental Docs', 'AA-Faculty Evaluations', and 'AA-Faculty Evaluations Packet'. The 'Search Type' section includes fields for ID, First Name, Last Name, Review Period, and Evaluation ID. A red arrow points to the 'Contains' search bar in the 'Document Search Results' pane. The search results table shows four items, with the second item selected. Below the results, a detailed view of a faculty evaluation document is shown, containing sections for 'Faculty Information' and 'Department Head Information'. A red circle highlights this detailed view.

DOCUMENT NAME	DOCUMENT DATE
AA-Faculty Evaluations for [REDACTED] INFORMATION & TECHNOLOGY SOLUTIONS	1/21/2021
AA-Faculty Evaluations for [REDACTED] INFORMATION & TECHNOLOGY SOLUTIONS	12/4/2020
AA-Faculty Evaluations for [REDACTED] INFORMATION & TECHNOLOGY SOLUTIONS	11/16/2020
AA-Faculty Evaluations for [REDACTED] INFORMATION & TECHNOLOGY SOLUTIONS	11/6/2020

**Faculty Information**

First Name *	Last Name *
[REDACTED]	[REDACTED]
Email Address *	Department (Banner Home Org) *
[REDACTED]	INFORMATION & TECHNOLOGY SOLUTIONS
Rank *	
[REDACTED]	

**Department Head Information**

Last Name *	First Name *	DH Email Address *
[REDACTED]	[REDACTED]	[REDACTED]