OnBase Quick Reference Guide
Retrieving Content from Within Campus Solutions

In addition to using the web client or Unity client directly, you can also retrieve content stored in OnBase from within CU-SIS – Campus Solutions (CS) by searching using Related Content and Related Actions.

Related Content applies to an entire page and pulls related documents up at the bottom of the screen. You know that a page has Related Content as you’ll see a Related Content drop down in the upper right-hand corner of the CS screen.

Related Actions applies to a specific field and pulls related documents up in a separate window. You know that a field has Related Actions as you’ll see a red triangle attached to the field. Right click on the triangle to view the available related systems.

Related Content
The following are the steps to retrieve content using Related Content at the page level in CS.

1. Search for the student using an area available to your department. If Related Content is available, it shows in the upper right-hand corner.

2. Click the drop-down arrow to view the available Related Content options.
3. Choose **Search DMO All Student Docs**. DMO stands for Document Management OnBase and this will retrieve all documents you have access to in the OnBase system for the currently-viewed student.

4. Related Content appears in a panel at the bottom of the screen with a list of documents.

5. Double click on an item in the search results list to view the document.

6. Click the arrow next to the gear icon and choose **New Window** to open the Related Content panel in its own browser tab.
Related Actions
The following are the steps to retrieve content using Related Action at the field level in CS.

1. Search for the student using an area available to your department. If Related Actions are available for a field (such as Student ID), a red triangle will appear on the upper right-hand corner.

2. Right-click on the red arrow next to the field you want to search.

3. Choose Search DMO All Student Docs. DMO stands for Document Management OnBase and this will retrieve all documents you have access to in the OnBase system for the currently-viewed student.

4. The document search screen pops up in a separate browser tab. Double click on an item in the search results list to view the document.