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 opens a new panel at the bottom of the screen, where additional information can be viewed in a split-screen format. You'll know that a page has Related Content enabled when you see a Related Content drop down in the upper right-hand corner of the page.
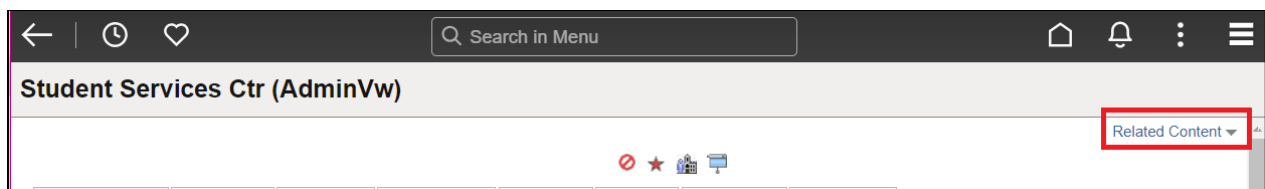
Related Actions applies to a specific field and opens in a separate window. You'll know that a field has Related Actions when you see a red triangle attached to the field. Right click on the triangle to view the available related systems.

Using Related Content/Actions to view OnBase documents will show you any documents you have access to for the student record being viewed. You will get the same results there as if you searched using the All Student Documents custom query in the OnBase clients.
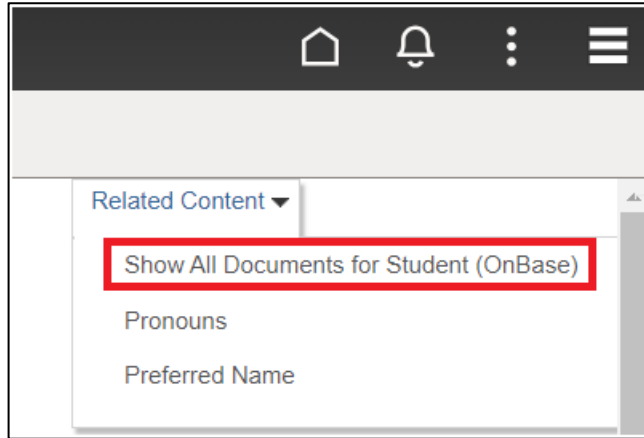
Related Content
The following are the steps to retrieve content using Related Content at the page level in CS.

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.
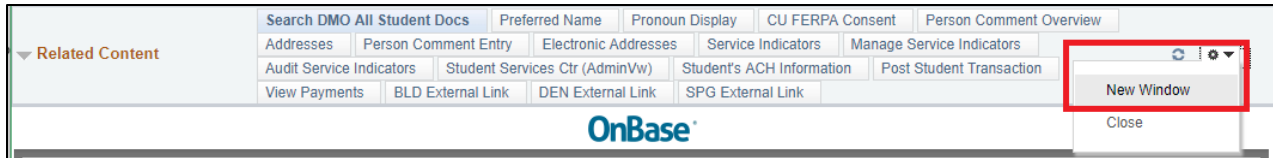

2. Click the drop-down arrow to view the available Related Content options.

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

3. Choose **Show All Documents for Student (OnBase)**. 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.
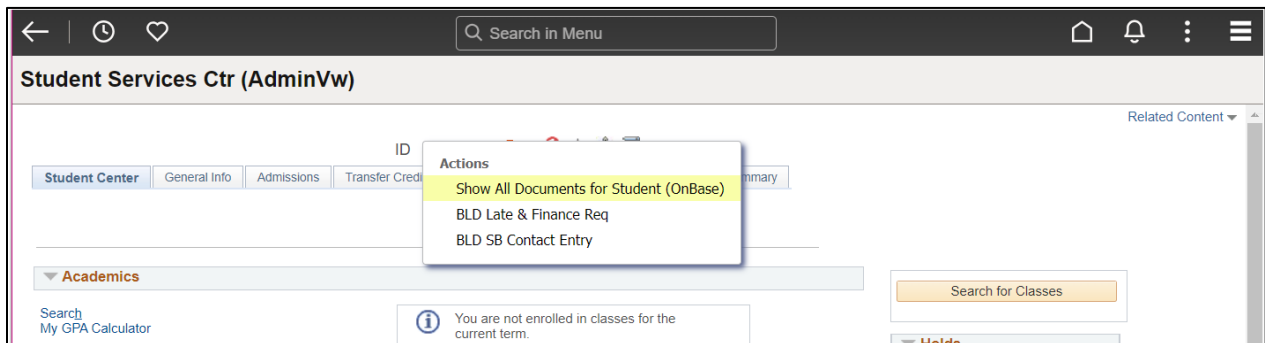
5. Double click on an item in the search results list to view the document.

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 **Show All Documents for Student (OnBase)**. This will retrieve all documents you have access to in the OnBase system for the currently-viewed student.

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

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus