OnBase Quick Reference Guide
Retrieving Content: Unity Client

This Quick Reference Guide takes you through the steps to retrieve content using the OnBase Unity Client on a Windows PC. To install the Unity client, refer to the [OnBase Web URLs and Unity Client ClickOnce URLs](#).

Refer to the [Retrieving Content – Web Client guide](#) for instructions for using the web client.
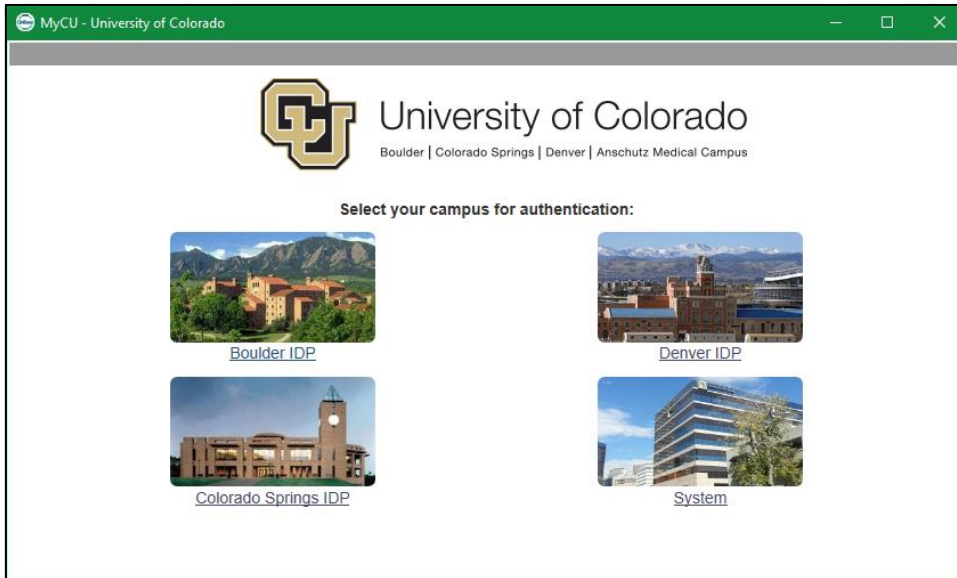
Retrieval

Searching by Document Groups and Types allows you to narrow your search by selecting the desired document type(s), date range and/or keyword values to locate documents. The following are the steps to search using Retrieval.

1.   Login into the Unity Client with your campus credentials.

First, select your campus. Depending on the size of the window, you may see campus names only or the campus names along with pictures. Single click on campus names or double click if the picture is displayed.
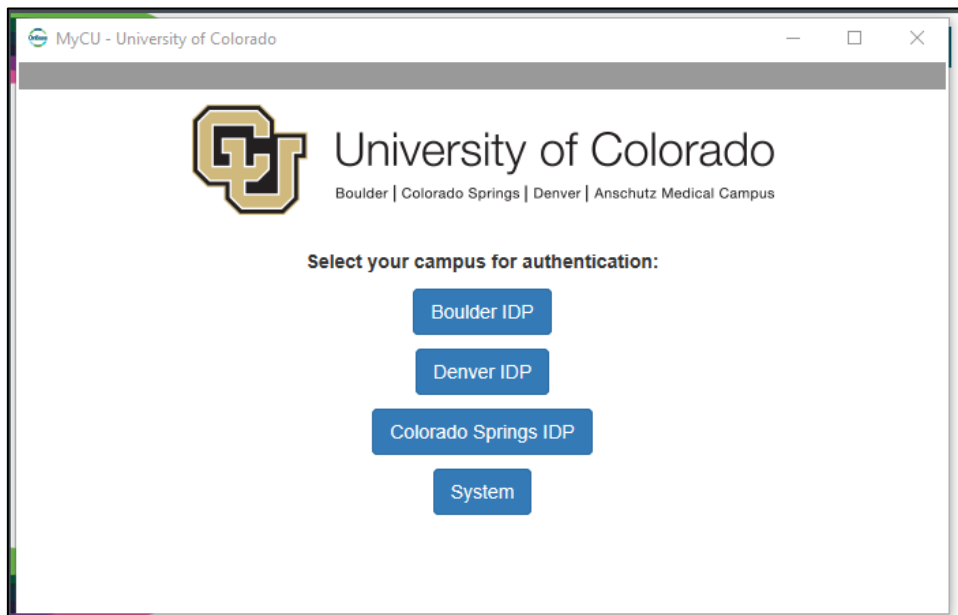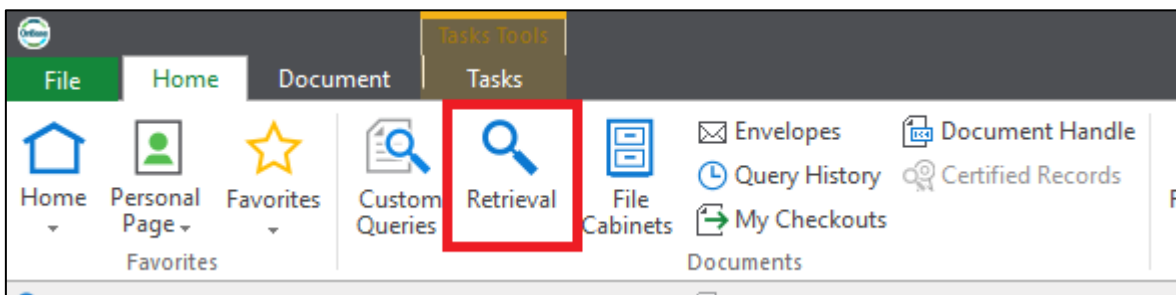

*Single click to select the desired campus.*

Double click to select the desired campus.

Enter your campus credentials. For assistance with your campus credentials, refer to the links on the login page for your campus.

2. Select **Retrieval** from the Home tab of the menu (if you are not brought there by default).


3. On the left side, a drop-down list of all Document Type Groups you have access to will be available and below that all Document Types you have access to will be listed.

4. Select a Document Type Group from the list to narrow down the list of Document Types to the Document Types within that Document Type Group. This allows you to search all Document Types within the group at once. This may return more than the maximum allowed number of results.
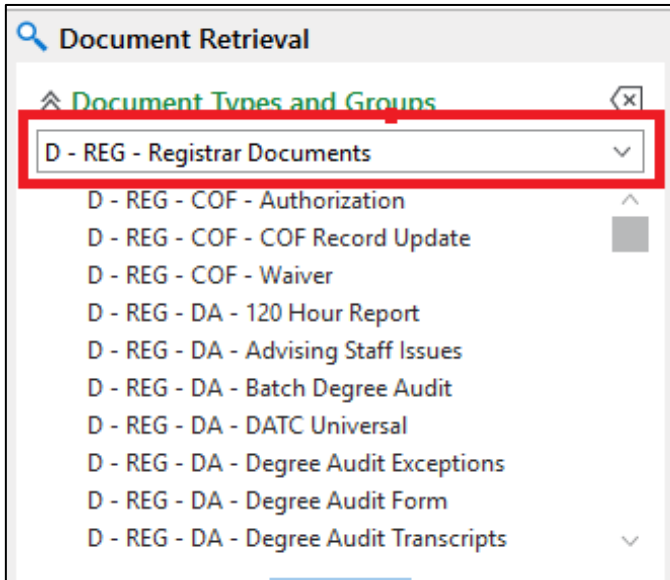
5. Further narrow your search results by selecting one or more Document Types from within the selected Document Type Group and clicking **Find** at the bottom of the panel.
- Select multiple Document Types by holding the Ctrl key on your keyboard and clicking the Document Types you want to select.
- This may return more than the maximum allowed number of results.
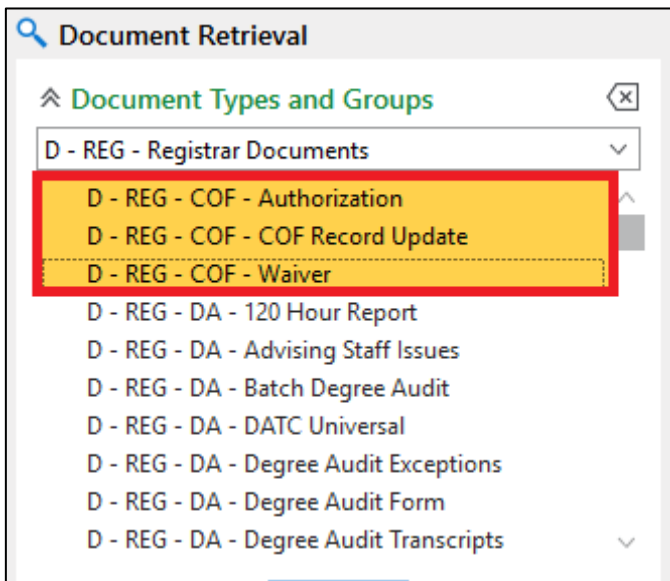
6. To refine your search, enter a date range and/or keyword values. Keywords may include name, Student ID, Employee ID or any identifier that will help narrow a search for your department.

Available keyword operators are as follows. Click the operator to cycle through the available operators; available operators change with the field type.

Operator	Description
=	Alphanumeric keyword values are matched exactly
<>	Alphanumeric keyword values are not equal to the specified value
>	Numeric keywords are greater than the specified value.
>=	Numeric keywords are greater than or equal to the specified value.
<	Numeric keywords are less than the specified value.
<=	Numeric keywords are less than or equal to the specified value.
"	Alphanumeric keyword values are searched using an exact match, even when a wildcard is used in the string

You can also perform a wildcard search to find results that are similar to but not exactly matching the specified value.

Wildcard Character	Description
*	Replaces multiple characters. This can make the search function as a begins-with search if used at the end of your entry. For example, entering UM* will return all results for UMC and UMGP.
?	Replaces one character. For example, entering A?S will return all results for APS and AES, but would not return results for ADMISSIONS.

7. Click the **Find** button at the bottom of the panel.

8.	The results will be displayed in a list. Double click an item in the list to view the document.
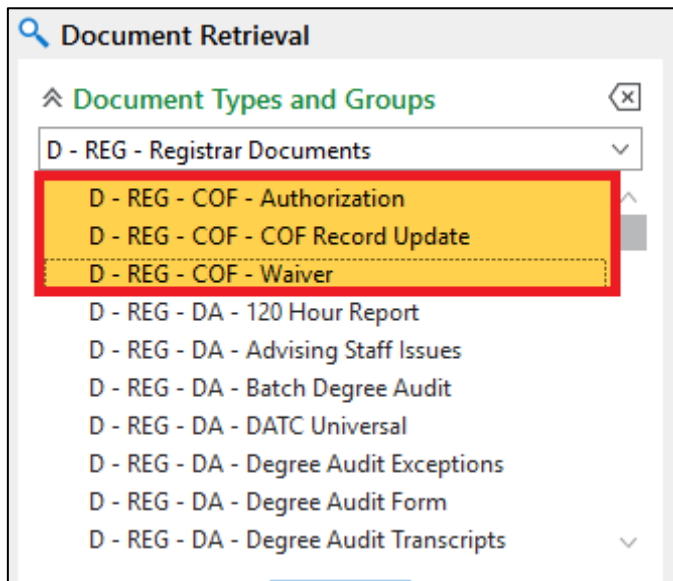
Full Text Search

Full Text Search allows you to search for words in the document title or body text. This functionality is limited to searching text-based file types or image files which have been processed via Optical Character Recognition (OCR) in Document Types configured to use full-text search.

The following are the steps to run a Full Text Search:

1.	If you are not already viewing **Retrieval**, select it on the Home tab of the menu.
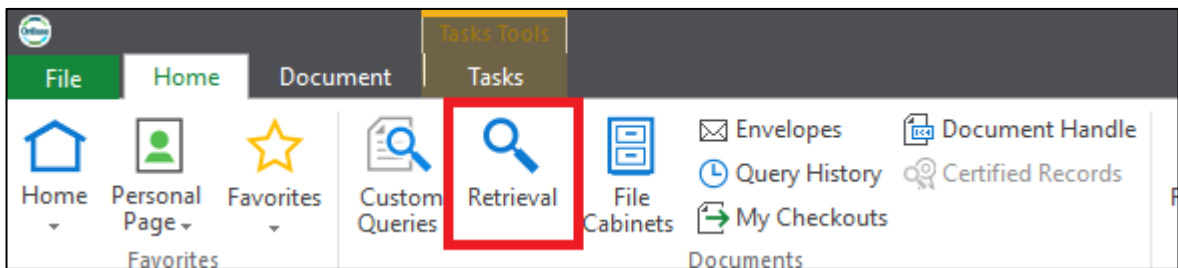
2.	Select the desired Document Type(s) and any applicable date range and/or keyword values.

3. If the Full-Text Search section is collapsed, expand it by clicking the double arrow to the left.

4. Type your search terms and click **Search**. All documents that include your search terms display in a list on the right side. Double click an item in the list to view the document.
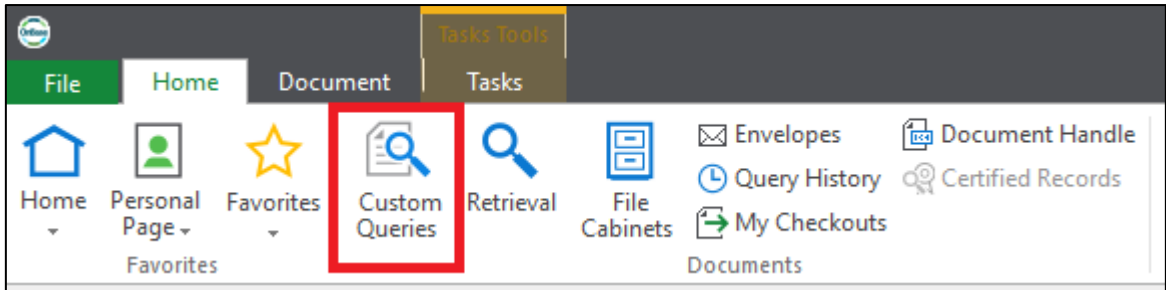

Custom Queries

Custom Queries allow you to search for pre-defined groups of documents by keyword, with additional information available for viewing, filtering, grouping and sorting in the results list.

Custom queries must be requested from the Document Management Services Team and you may not see a Custom Query set up for your group. Please contact your local departmental administrator or UIS_DM_Support@cu.edu if you are interested in having a Custom Query created.

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The following are the steps to run a search using Custom Query:

1. Select **Custom Queries** from the Home tab of the menu.

2. Select the custom query you want to use from the list at the left. You can use the search field at the top of the list to narrow the list down to items that match the entered text.
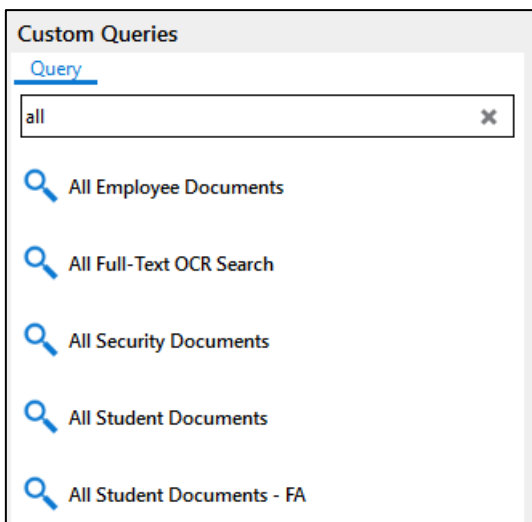
3. Enter keyword values as applicable/desired. You must enter at least one keyword to search all documents using custom queries. These may include Student ID, Employee ID, Campus Code, etc.

4. Click **Search**.

5. The results of your search will appear in a list to the right. Column headings can be used to sort, filter or group the results. Double click an item in the list to view the document.