

OnBase Quick Reference Guide

Document Retrieval: Unity Client

This Quick Reference Guide takes you through the steps to retrieve documents using the OnBase Unity Client on a Windows PC.

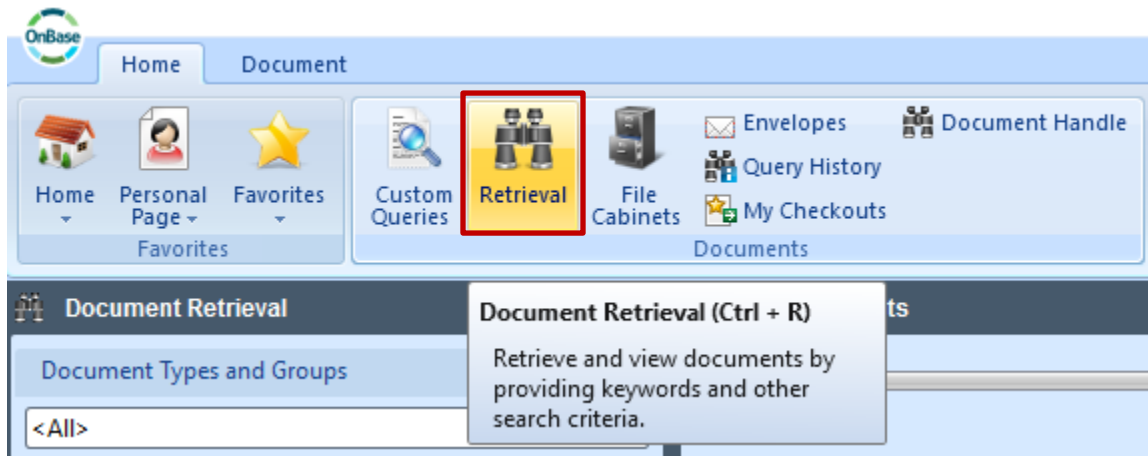
Document Groups and Types

Searching by Document Groups and Types allows you to narrow your search by pre-configured collections of related documents. The following are the steps to search using Document Groups and Types.

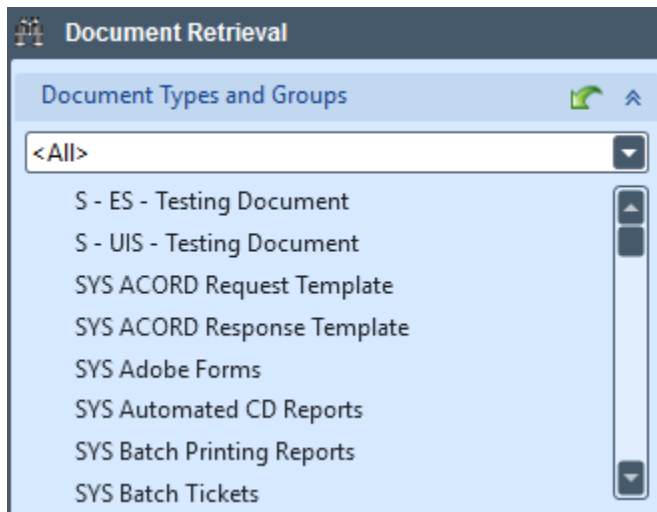
1. Login into the Unity Client with your PeopleSoft Operator ID.



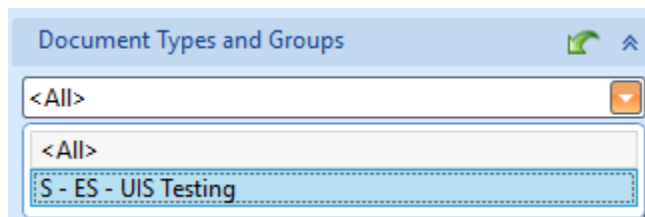
2. Select Retrieval from the menu.



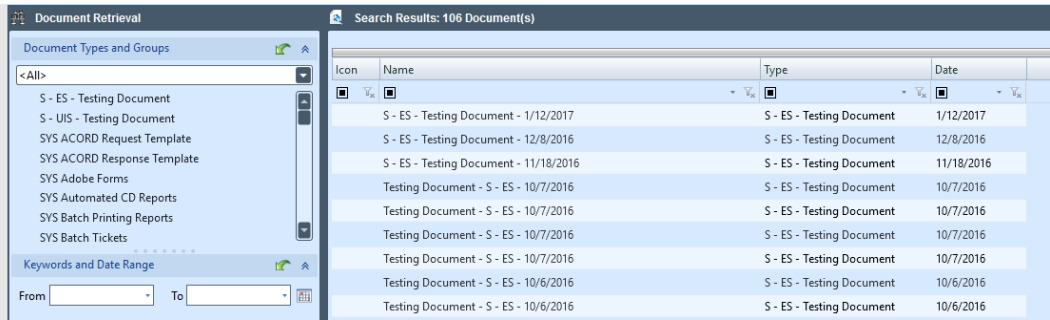
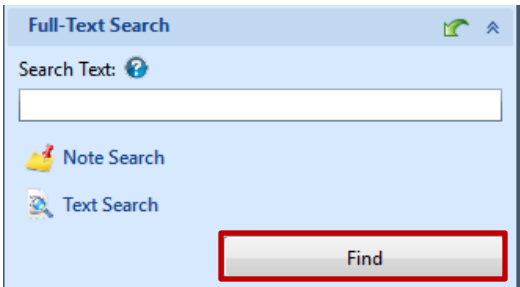
3. The list of all documents to which you have access is displayed in the left-hand panel.



- a. Select a Document Group from the drop down to narrow your search.

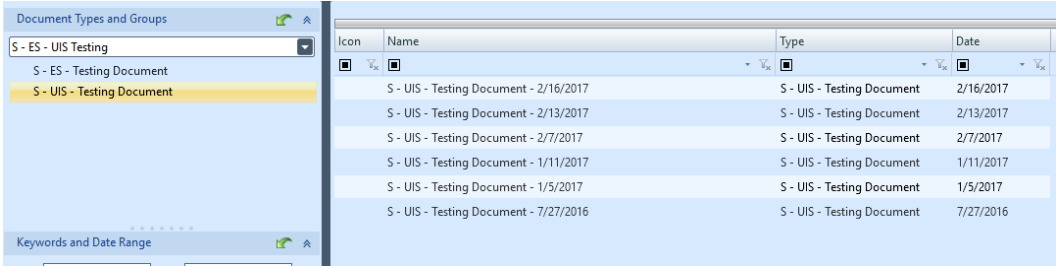
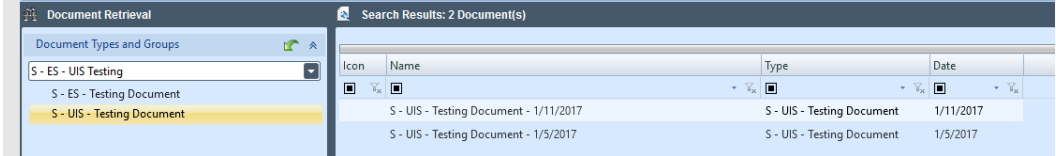


Document Types within that group show under the left-hand panel. Click Find in the lower left-hand corner of the panel to see all documents to which you have access.



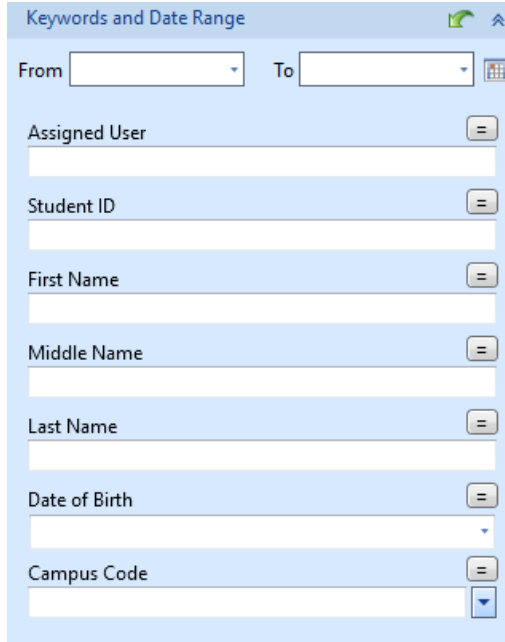
b. Further narrow your search results by selecting a Document Type from within the Group and clicking Find in the lower left-hand corner of the panel.

Note: Select multiple Document Types by holding the Ctrl key on your keyboard and right-clicking the Document Types you want to select.



Keywords and Date Range Search

You can always limit your document search by a specific date range. Your OnBase Administrator may elect to configure keywords that align with the type of work your department does to speed your searches. 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 change your parameters – available operators change with the field type.

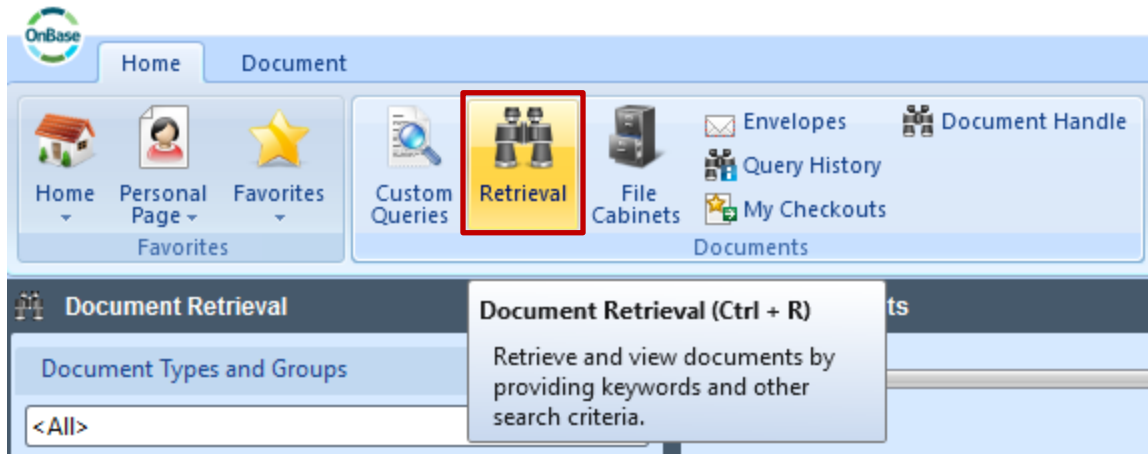
Operator	Description
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- | | |
|----|--|
| = | Alphanumeric keyword values are matched exactly. |
| <> | Alphanumeric keyword values are not equal to the specified value. |
| > | Numeric keywords are greater than the specified value. |
| >= | Numeric 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. |

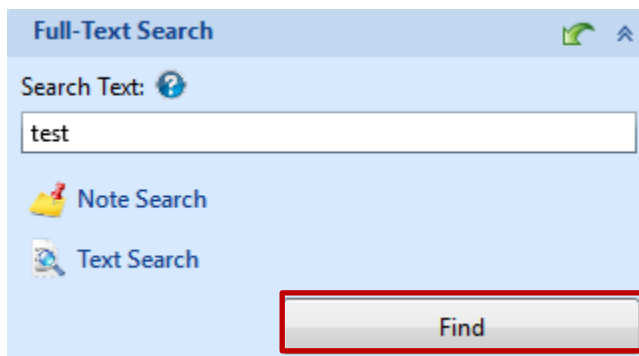
Full Text Search

Full Text Search allows you to search for key words in the document title or body text. The following are the steps to run a Full Text Search. This functionality is limited to searching text-based file types or image files that have been processed via Optical Character Recognition (OCR).

1. Select Retrieval from the menu.



2. Type your search terms and click Find.



3. All documents that include your search terms display in the right-hand Search Results panel.

Score	Name	File Type	Summary
95.45	Testing Document - S - ES - 10/7/2016	Image File Format	has all queues, appropriate and access ad hoc to tasks Thick Workflow Execute Workflow Test lifecycle
95.45	UIS Testing Document - 12/18/2015	Image File Format	Index Doc successfully type and keyword values applied Fail cannot test if cannot sweep Thick Processing
95.45	UIS Testing Document - 7/24/2015	Image File Format	in and COLD automatically are *Awaiting sucesfully Commit indexed. Pass Test imported Appear Thick Admin
95.45	UIS Testing Document - 3/16/2014	Image File Format	in and COLD automatically are *Awaiting sucesfully Commit indexed. PASS Test imported Appear Thick Admin
95.45	UIS Testing Document - 1/25/2014	Image File Format	in and COLD automatically are *Awaiting sucesfully Commit indexed. Test imported Appear Thick Admin Document
95.45	UIS Testing Document - 1/25/2014	Image File Format	in and COLD automatically are *Awaiting sucesfully Commit indexed. Test imported Appear Thick Admin Document
95.45	Testing Document - S - ES - 1/9/2014	Image File Format	documents in and COLD automatically *Awaiting are sucesfully Commit indexed. PASS Test imported Appear
95.45	Testing Document - S - ES - 1/7/2014	Image File Format	documents in and COLD automatically *Awaiting are sucesfully Commit indexed. NA did not test Test Appear
90.91	Testing Document - S - ES - 1/24/2014	Image File Format	right away, UIS: Related Test Email Send to Timer Queue Test Items Function to wait 1 minute Complete
86.36	Testing Document - S - ES - 10/7/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 10/5/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 10/5/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 10/5/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 10/5/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 9/5/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	Testing Document - S - ES - 8/26/2016	Image File Format	UIS Test Document To check to make sure Document Retrieval works.
86.36	UIS Testing Document - 12/18/2015	Unity Form	

Custom Queries

Custom queries allow you to retrieve and view a collection of documents using pre-configured search criteria determined by your campus OnBase Administrator. An example might be a custom query to search for all student documents, as follows.

The screenshot shows the 'Custom Queries' interface. On the left, a sidebar lists queries, with 'All Student Documents' selected. The main panel displays the query configuration for 'All Student Documents'. At the top, there is a 'Go To Results' button and a search prompt 'Search For All Student Docs'. Below this, several search criteria are listed, each with a corresponding input field:

- Student ID
- First Name
- Middle Name
- Last Name
- Date of Birth
- Campus Code

At the bottom of the main panel, there is a 'Find Text in Documents' section with a 'Find What:' input field, an 'Options' dropdown, and a 'Clear Text Constraints' button. A 'Clear' button is located at the bottom left, and a 'Search' button is at the bottom right.