# OnBase Quick Reference Guide
Retrieving Content: Web Client

This Quick Reference Guide takes you through the steps to retrieve content using the OnBase Web Client on a Windows PC or Mac computing device. Refer to the [Retrieving Content – Unity Client guide](#) if using the Unity 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. Document Retrieval is the default home page in the OnBase Web Client.

1. From the employee portal/CU Resources tab, select **OnBase DM** under Business Tools.
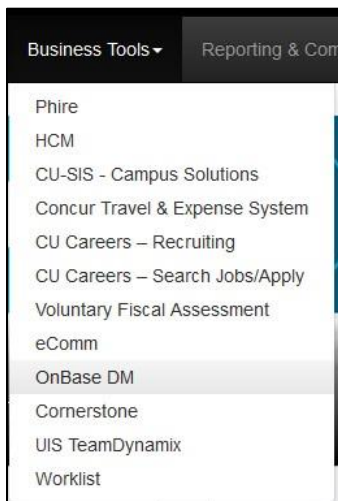

2. If you are not directed to Document Retrieval by default, open the navigation menu and choose **Document Retrieval**.

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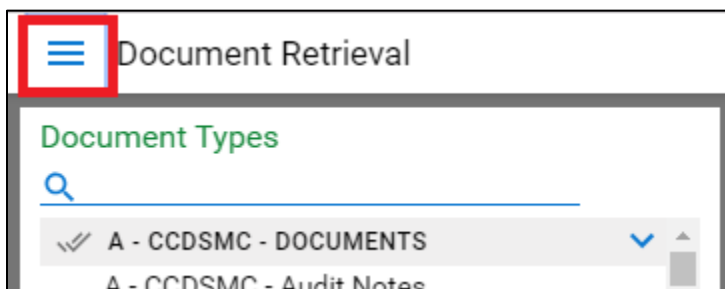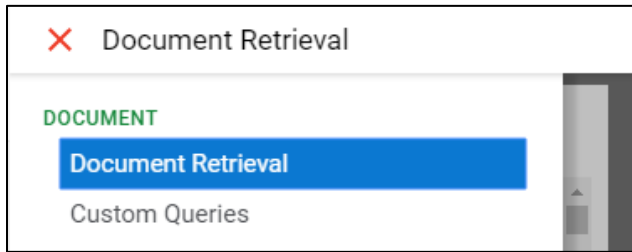
3. The list of all Document Type Groups and Document Types to which you have access is displayed in the left-hand panel. Document Type Groups can be expanded and collapsed using the arrow to the right of each group name. Enter text in the search bar to narrow down the list to items that match the entered text.
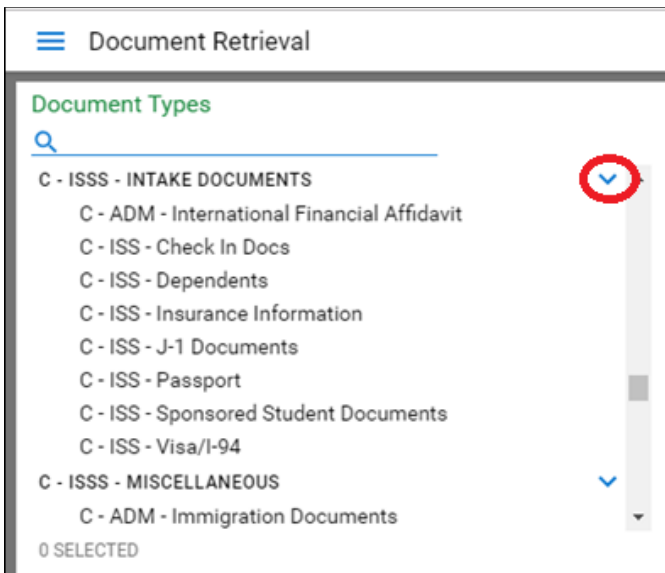
4. Select one or more Document Type Groups from the list and click Search at the bottom of the panel to search all documents in the document type groups selected.
   - Select multiple Document Type Groups by holding the Ctrl key on your keyboard and clicking the Document Type Groups you want to select.
   - This may return more than the maximum allowed number of results.

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5. Further narrow your search results by selecting one or more Document Types from within the selected Document Type Group(s) and clicking Search 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.

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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

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*	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.

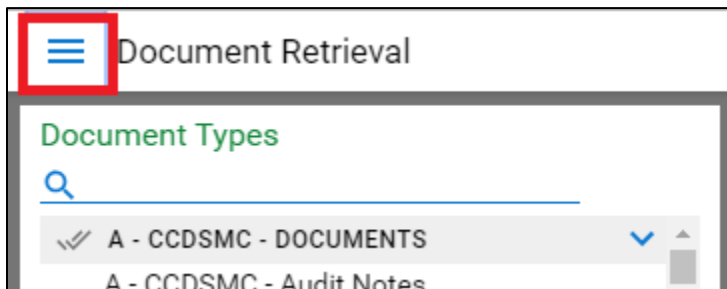7. Then click **Search** at the bottom of the panel.
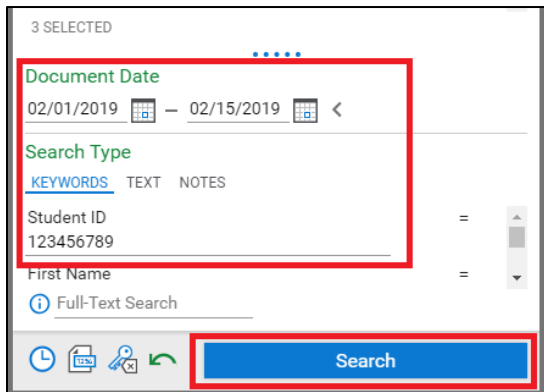
8. The results will be displayed in a list. Double click an item in the list to view the document.

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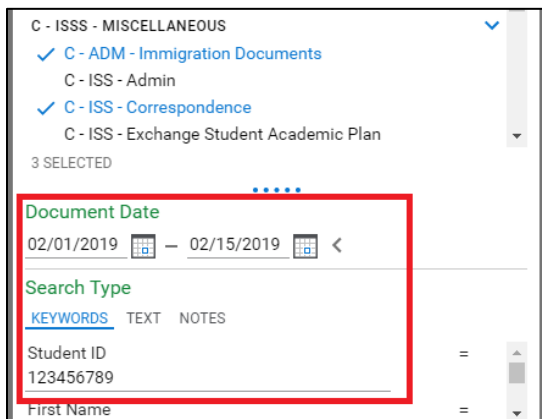
The following are the steps to run a Full Text Search:

1. If you are not directed to Document Retrieval by default, open the navigation menu and choose **Document Retrieval**.
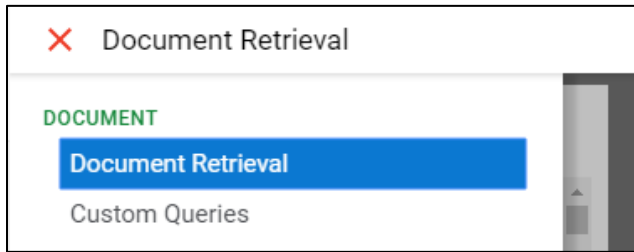
2. Select the desired Document Type(s) and any applicable date range and/or keyword values.

3. Type your search terms in the search field at the bottom of the panel 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.
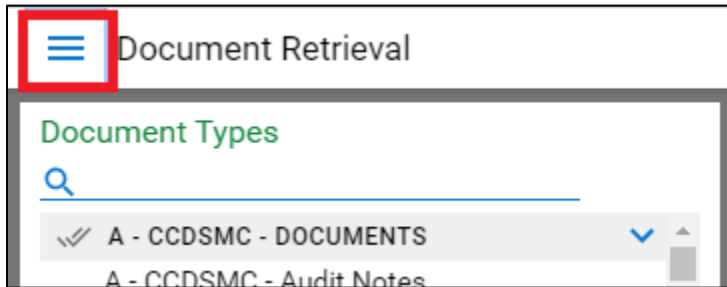

Custom Queries

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.

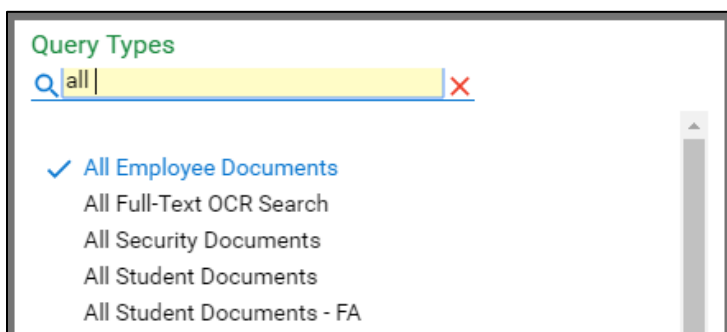The following are the steps to run a search using Custom Query:

1. Open the navigation menu.

2. Choose **Custom Queries** from the list.
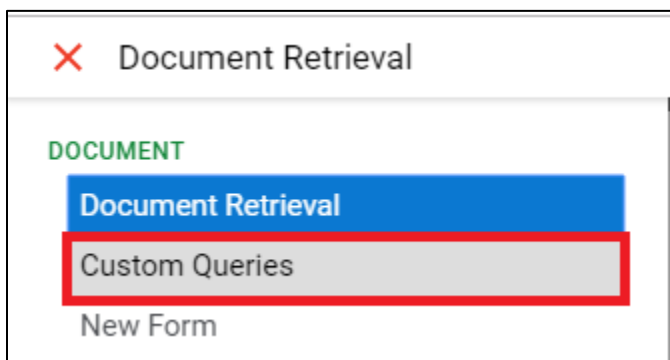
3. Select the Custom Query you want to search. You can use the search field at the top of the list to narrow the list down to items that match the entered text.

4. Enter keyword values as applicable/desired. You must enter at least one keyword to search all documents using Custom Query. These may include Student ID, Employee ID, Campus Code, etc.

5. Click **Search**.
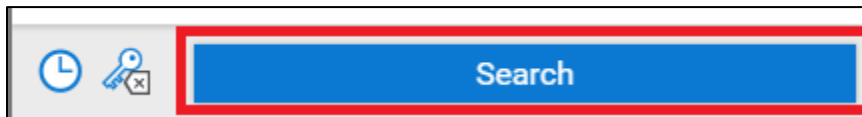

6. The results of your search will appear in a list to the right. Column headings can be used to sort, filter or group the results. Double click an item in the list to view the document.

Custom Query Results

Drag a column header here to group by that column.

DOCUMENT TYPE	DOCUMENT DATE	EMPLOYEE ID	FIRST NAME	MIDDLE NAME	LAST NAME
▽ Contains...	▽ On...	▽ Contains...	▽ Contains...	▽ Contains...	▽ Contains...
B - BUR - SFS - Security FTP	2/10/2017	123456			
B - BUR - SFS - Security Nelnet	8/29/2018	123456			
B - BUR - SFS - Security SACR	3/9/2017	123456			
B - BUR - SFS - Security SACR	3/9/2017	123456			
B - BUR - SFS - Security SACR	3/8/2017	123456			
B - BUR - SFS - Security SACR	3/8/2017	123456			
B - BUR - SFS - Security SACR	3/8/2017	123456			
Items: 86					