OnBase Quick Reference Guide
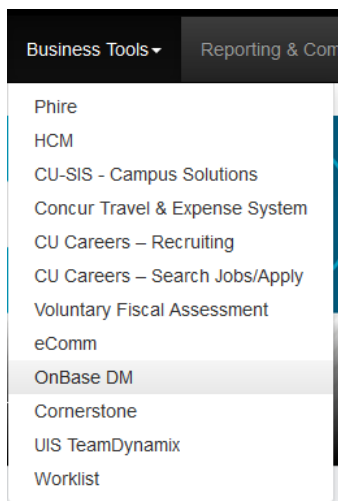
Document Retrieval: Web Client

This Quick Reference Guide takes you through the steps to retrieve documents using the OnBase Web Client on a Windows PC or Mac computing device.
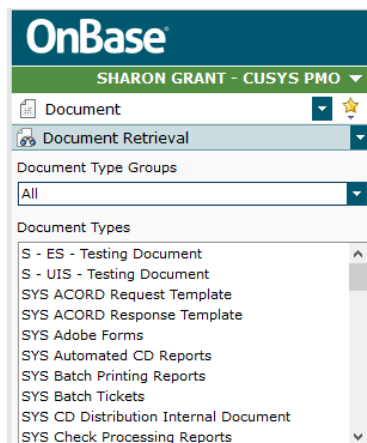
Document Type Groups

Searching by Document Type Groups allows you to narrow your search by pre-configured collections of related documents. Document Retrieval using Document Type Groups is the default selection in the OnBase Web Client.

The following are the steps to search using Document Type Groups.

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

2. The list of all document types to which you have access is displayed in the left-hand panel.

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a. Select a Document Type Group from the drop down menu and click Find in the lower left-hand corner of the panel to narrow your search.
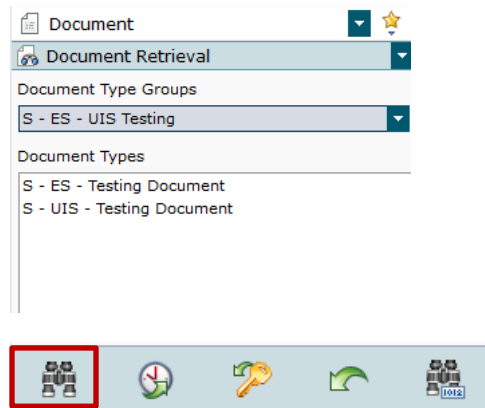

b. Further narrow your search results by selecting a Document Type from within the Group and clicking Find in the lower left-hand corner of the panel.

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

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 which have been processed via Optical Character Recognition (OCR).

1. Type your search terms in the search field in the lower left-hand panel and press Enter on your keyboard. All documents that include your search terms display in the right-hand Search Results panel.
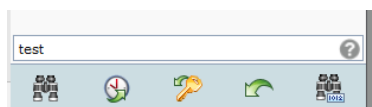
Score	Name	File Type	Summary
95.45	Testing Document - S - ES - 10/7/2016	Image File Format	has all queues, appropriate and access ad hoc to tasks Thick Workflow Execute Workflow Test lifecycle
95.45	UIS Testing Document - 12/18/2015	Image File Format	Index Doc successfully type and keyword values applied 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 sucessfully 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 sucessfully 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 sucessfully 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 sucessfully 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 sucessfully 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 sucessfully Commit indexed. NA did not test Test Appear
90.91	Testing Document - S - ES - 1/24/2014	Image File Format	right away. IUsk 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.