Madison College

Business Process Documentation

Procedure: Document Retrieval using OnBase Web Client

Navigation: N/A

BPG Owner: Enrollment Center Director

File Path: \Systems and Processes\Process Info\Imaging\Process Guide\OnBase Web Client Document Retrieval

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OVERVIEW

Document retrieval using OnBase Web Client offers a seamless integration between the Madison College student database (PeopleSoft Campus Solutions) and imaged documents within the OnBase system.

The OnBase Web Client enables users to search and retrieve Madison College imaged documents, as well as use a set of tools for interacting with, editing and managing information on these documents.

DEPENDENCIES – RELATED EXTERNAL PROCESSES IMPACTED

OnBase Enterprise Content Management System access.

WARNINGS, CAUTIONS, GUIDELINES

Access to any image within OnBase requires membership in the appropriate active directory group.

PROCEDURE

1. Click or Open the following hyperlink using Microsoft Internet Explorer

https://onbase.madisoncollege.edu/appnet
PROCEDURE

Document Retrieval

Once you have successfully logged into OnBase through the Web Client, you are presented a Home Page.

OnBase offers different methods in which you can search:

**Document Type Groups** - Allow user to narrow document search by Document Type Group or department

**Document Types** - Allow user to narrow document search by Document Type. Once a Document Type is selected, the Keywords will be available. As more Document Types are selected, the list of keyword types in the Keywords section will be limited only to those Keywords that all the selected Document Types have in common

**Dates** - Allow user to define specific date or range of dates based on the document date of the document. The desired months can be selected from the list box and will automatically be entered in the From and To fields

**Keywords** - Allow user to enter specific Keywords to narrow document searches. The Keyword edit fields will change depending on the Document Type selected

**Text** - Opens an additional dialog box that allows you to conduct a more specialized search

**Note** - Opens an additional dialog box that allows you to search for a specific note type
Select a Document Type Group. You will now see a list of Document Types for the selected Document Type Group.

Select the Document Type(s) to retrieve

Add info on entering keyword
**Document Retrieval by Keywords**

A Keyword is an identifying piece of information used to locate documents stored within the electronic document imaging system.
To retrieve documents by keyword values:

**Select a Document Type Group**

**Select the Document Type(s) to retrieve**

**NOTE**: If multiple Document Types are selected, only the common Keyword Types for those Document Types appear.

**Enter a keyword value** into one or more fields. The more information entered the more specific the search will be.

**Click the Search icon** to execute the search. All of the documents in OnBase for the selected Document Type that have the keyword value(s) indicated are displayed in the Document Search Results window.

**Double-click on any of the documents** to view them.

**NOTE**: Click on the keyword label (or within the keyword box press F6) to add additional search fields of the same keyword type. **Example**: You would like to search for a student and are unsure of the spelling of the name. In order to search for both last names, click on the last name keyword label and be sure to click on the AND operator to change it to OR.
| **Equal To** | Allows you to search for keyword values that are an exact match entered for retrieval. |
| **<>** | Not Equal To allows you to search for keyword values that are not equal to the entered for retrieval. |
| **==** | Double Quotes returns only those documents containing the literal entry. |
| **>** | Greater Than allows for the retrieval of documents with keyword values greater than the numeric or date value entered for retrieval. |
| **<** | Less Than allows for the retrieval of documents with keyword values less than the numeric or date value entered for retrieval. |
| **>=** | Greater Than/Equal To allows for the retrieval of documents with keyword values greater than or equal to the numeric or date value entered for retrieval. |
| **<=** | Less Than/Equal To allows for the retrieval of documents with keyword values less than or equal to the numeric or date value entered for retrieval. |
| **F6** | F6 opens a second entry field for the active keyword. You can also click on the **And** button. |
| **AND** | And allows for searching two or more values of the same keyword type that exist in the selected document type. |
| **OR** | Or allows you to search either one (or more) documents containing either one keyword types. Click And to change to Or. |
| **TO** | To allows you to search from one keyword to another keyword of the same keyword. Used with Numeric or Date keywords. |
Click the Search icon to execute the search. The Document Search Results window will display in the upper right-hand window.

Double-click on a document in the results hit list that you wish to view. The document will be displayed below the Document Search Results window.

Web Client Tips

- **Executes a search using the information configured in the Retrieval Screen**
- **Displays history of recently used Queries**
- **Clears only the information entered in the Keyword edit fields**
- **Clears all highlighted information and information in edit fields, including dates**
- **Executes a search by Document Handle**
Be sure to exit the OnBase Web Client properly using the Exit Door (this releases the license properly & more quickly)

OnBase has a 20 minute time-out for inactivity. If you ignore the warning you will be taken back to the login screen.