Using the OnBase Web Client
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Starting the Web Client

If this is the first time you have accessed the web client, download and install the web client ActiveX controls located on the Onbase Main Page.  Download ActiveX controls

To start the OnBase Web Client:

1. Open Microsoft Internet Explorer.

Note: Microsoft Internet Explorer on a Microsoft Windows system is the only web browser supported by the OnBase web client.

2. Enter https://onbase.bgsu.edu into the address bar.
   • The web client login page will load.

3. Enter your user name into the Username text box.

4. Enter your password into the Password text box.

5. Click the Login button.
Retrieving Documents

Retrieving and opening documents takes four main steps:

Open the Document Retrieval panel:

The Document Retrieval window is open by default when OnBase is started. If the window is not open: In the left navigation panel, click on the Mode dropdown list and select Document Retrieval.

Select the Document Type:

1. Select the document type group in the Document Type Groups list box in the left panel.
   - The Document Types list box will display the document types in that group.
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2. Select the document type in the **Document Types** list box.

Find the document:

- To search by index date, see: [Search by Index Date](Page 4)
- To search by keyword, see: [Search by Keyword](Page 5)

Open the document:

- To open the document, see: [Opening Documents](Page 8)

**Search by Index Date**

To search for documents by specific index date:

1. Enter dates into the **From** and **To** text boxes.

   ![The Dates section of the Document Retrieval panel](image)

2. Click the **Find** button.

To choose a From and To index date using the calendar:

1. Click on the **Calendar** button next to the text box.
   - The Calendar box will appear next to the text box, as shown below.

   ![The Calendar box](image)

2. Click on the top arrow keys to change months.
3. Click on the desired date.

To search for documents by month:

1. Click on the **Expand** button in the top right corner of the Dates section.
   - The area will expand to show the advanced date options.
2. In the left list box, click on the first month and year to be searched.
The search by month list box

3. Left click on the last month to be searched.
4. The **From** and **To** text boxes will be filled in automatically.
5. Click the **Find** button.

**To search for documents relative to the current date:**

1. Click on the **Expand** button in the top right corner of the Dates section.
   - The area will expand to show the advanced date options.
2. In the right list box, select the time period to be searched.
   - The **From** and **To** text boxes will be filled in automatically.
3. Click the **Find** button.

**Search by Keyword**

**To search for a document by keyword:**

1. Enter the keywords into the fields in the Keywords section of the Document Retrieval panel.

   **Note:** The number and type of keyword fields will vary based on the document type.

2. Click on the **Find** button.

**To search for a document by keyword when you do not know the full keyword:**

See: [Using Wildcards](Page 7)

**To search for a document using multiple values for the same keyword type:**

See: [Using Operators](Page 6)
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Searching for a document using multiple values for the same keyword type.

Using Operators

You can search for a document using multiple values for a keyword type.

Searching for more than one year keyword.

To create a new entry for a keyword type:

Double click on the keyword name above the text box.

To combine multiple keyword values:

3. Duplicate a keyword using the methods shown above.
4. Enter the search terms into the keyword boxes.
5. Left click on the operator button next to the topmost copy of that keyword type.

The operator button
Operator Purposes

<table>
<thead>
<tr>
<th>Operator</th>
<th>Allowed Values</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>OR</td>
<td>Any</td>
<td>Retrieves documents containing keywords that match one or more of the values entered for that keyword type.</td>
</tr>
<tr>
<td>AND</td>
<td>Any</td>
<td>Retrieves documents containing keywords that match all of the values entered for that keyword type.</td>
</tr>
<tr>
<td>TO</td>
<td>Numerals or dates</td>
<td>Retrieves documents containing keywords between the values entered for that keyword type.</td>
</tr>
</tbody>
</table>

Using Wildcards

Keyword Wildcards allow you to search for a keyword even if the full keyword isn't known.

To use a wildcard in your keyword search:

- Use the * symbol to replace unknown letters or numbers.
  - For example: if you are searching for the name "Jane Roberts", but only know "Jane" and "Rob", enter Jane Rob* to search for all names beginning with "Jane Rob".

Searching Notes

Open the Document Retrieval window:

The Document Retrieval window is open by default when OnBase is started. If the window is not open: In the left navigation panel, click on the Mode dropdown list and select Document Retrieval.
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To search for notes:

1. Select the document type group in the Document Type Groups list box at the top of the Document Retrieval window.
   - The Document Types list box will display the document types in that group.
2. Select the document type in the Document Types list box.
3. Click the Note tab in the left panel.
4. Click on the Note Types dropdown and select the desired note type.
5. Enter the word or words to be searched for in the Search String text box.
6. Click the Find button.
7. Double click on a result to view the document.

Opening Documents

The Document Search Results panel
OnBase will list the documents matching your search terms in the Document Search Results window. If there is only one document found, it will be opened automatically.

To view a document:

Double click on the document name in the Document Search Results window.
Using Notes

Creating a Note

To create a new note:

1. Click the Add Note button on the document toolbar.

Or

1. Right click anywhere on the image of the document, select the Notes submenu, then click Add Note.
2. Choose the note type in the Add Note dialog box.
3. Click OK.
   - An open note will be created on your document.

4. Type the desired note text into the white section of the note.
5. Click on the top bar of the note to save and hide the note contents.
   - The note will be displayed on the document using the note icon
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Changing a note

To change the text of a note:

1. Double click on the note icon on the document.

2. Change the current text of the note as desired.

3. Click on the top bar of the note to save and hide the note contents.

Searching Notes

Open the Document Retrieval window:

The Document Retrieval window is open by default when OnBase is started. If the window is not open: In the left navigation panel, click on the Mode dropdown list and select Document Retrieval.

To search for notes:

1. Select the document type group in the Document Type Groups list box at the top of the Document Retrieval window.
   - The Document Types list box will display the document types in that group.

2. Select the document type in the Document Types list box.

3. Click the Note tab in the left panel.

4. Click on the Note Types dropdown and select the desired note type.
5. Enter the word or words to be searched for in the **Search String** text box.
6. Click the Find button.
7. Double click on a result to view the document.
Indexing Documents

1. In the left navigation panel, click on the **Mode** dropdown list and select **Indexing**.

![The mode dropdown list](image)

2. Select a scan queue by clicking the **Select a Queue** dropdown list and selecting the desired scan queue.
   - Most documents requiring indexing will be in the **Awaiting Index** or **Index in Progress** document queues.

3. Left click on the document batch to be indexed.

4. Right click on the document batch and select **Index Documents**.
   - The first document in the batch will be displayed in the main panel.
5. Select the document type by clicking on the **Document Type** dropdown list in the left panel and selecting the proper document type.

6. Enter the required keywords into the text boxes.

7. The number and type of keywords required depends on the document type.

8. Click the **Index Documents** button to index the documents.

   • The document will be indexed and committed to the OnBase system.

### Changing Keywords

**To change the keywords of a document:**

1. Retrieve the document with keywords you wish to modify.

   • For more information on searching and retrieving documents, see [Retrieving Documents](#) (Page 3).

2. Right click on the document and select **Keywords**.

   • The Add / Modify Keyword dialog box will open.

![The Add / Modify Keywords Dialog Box](image)

3. Enter new document information into the individual fields in the **Keyword** section.

4. Click **Save**.
Re-indexing Documents

Documents can be re-indexed, allowing you to change both the keywords and document type of the document.

To re-index a document:

1. Retrieve the document with keywords you wish to modify.
   - For more information on searching and retrieving documents, see Retrieving Documents (Page 3).
2. With the Document Search Results window open, left click on the document to select it.
3. Click on the File menu, and then click on Re-Index.
   - The Re-Index Document dialog box will open.
4. Select the Document Type.
5. Enter new document information into the individual fields in the Keyword section.
6. Click Re-Index.
Importing Documents

Documents, in the form of either text files or image files, can be imported directly into OnBase from your computer. Documents are imported one at a time, and indexed as they're imported.

To import a document:

1. In the left navigation panel, click on the **Mode** dropdown list and select **Import Document**.

2. Click the Browse button to open the **Open** dialog box.

3. Find the file you wish to import and click **Open**.

4. Select the document type group in the **Document Type Group** drop-down list.

5. Select the document type in the **Document Type** drop-down list.

6. Select the file type of the file you are importing in the **File Type** drop-down list.

7. Enter document information into the individual fields in the **Keyword** section.
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**Note:** The number and type of keyword fields will vary based on the document type.

8. Click the **Import** button.
   - The document will be committed to OnBase.
Printing, Saving, and Document Histories

Printing Documents

To print an entire document:
Left click on the Print button in the toolbar.

Or
Right click on an open document and select Print.

To print a selected area of a document:
1. Press and hold the CTRL key and left click and hold the mouse cursor in the area you wish to print.
2. Drag the mouse over the area.
   • A bounding box will appear containing the area to be printed.
3. Release the left mouse button.
   • A menu will appear at your mouse pointer.
4. Select Send To, then Printer.

Save Documents to Your Computer

To save a copy of a document to your computer:
1. Right click on the document, select Send To, and then File.
   • The Save To File dialog box will open.
2. Select the type of file to be saved using the Content Type dropdown list.
3. Select the pages to be saved.
4. Click OK.
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- The Save As dialog box will open.

5. Choose the location and filename for the document.
6. Click **Save**.

**Viewing Document Histories**

Document histories show records of who has created, changed, and viewed a document, and when those actions occurred.

To view a document's history:

- Right click on the document and select **History**.
  - The Document History window will open.