

Login and Document Retrieval – Web Client

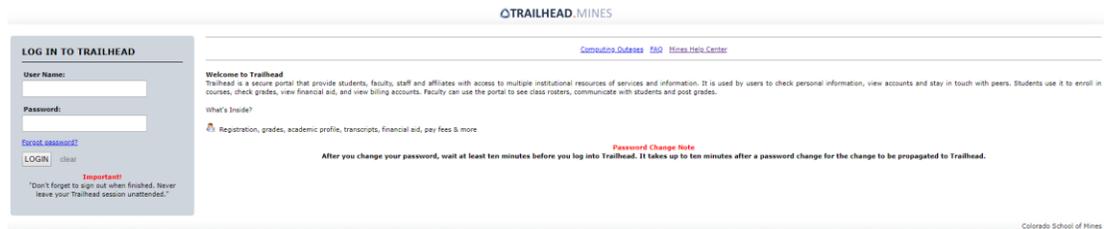
This guide offers instructions on how to login to the OnBase Web Client from Trailhead, and perform a search to retrieve a document. For instructions on how to login and retrieve documents using the OnBase Unity Client, see the [Login and Document Retrieval using Unity Client](#) Quick Reference Guide.

Login

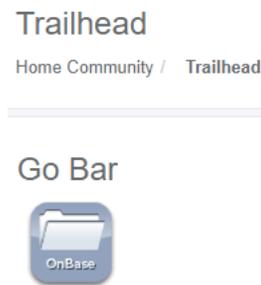
Perform the following steps to login to the OnBase Web Client from Trailhead.

1. Visit <https://trailhead.mines.edu> and login with your Multipass credentials. This is the same *username* and *password* you use to log into your Mines email.

**NOTE: Following the recommendation for Banner, Google Chrome is the preferred web browser*



2. Under the *Go Bar* section, double click on the **OnBase** icon.



3. You will be logged into OnBase via Single Sign-on (SSO) and routed to the Web Client.

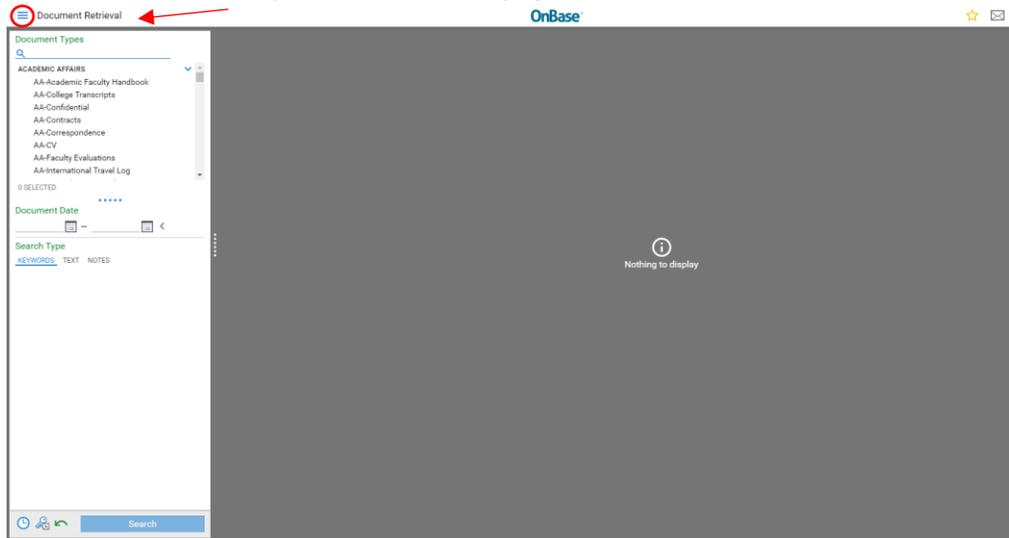


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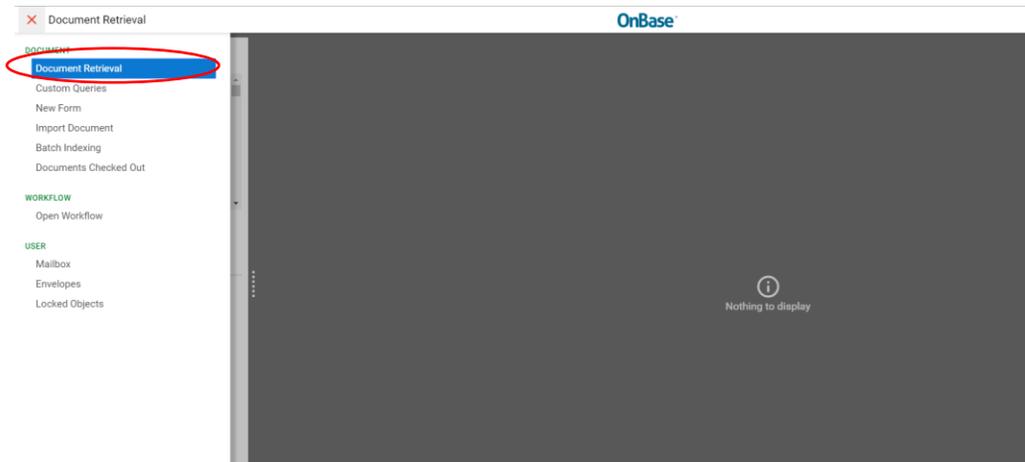
Retrieve a Document

Perform the following steps to retrieve a document from the OnBase Web Client.

1. By default, the Web Client will open to **Document Retrieval**.
If this does not happen, navigate to Document Retrieval by clicking the navigation menu (three stacked bars) at the top left corner of the page.



Select *Document Retrieval*.

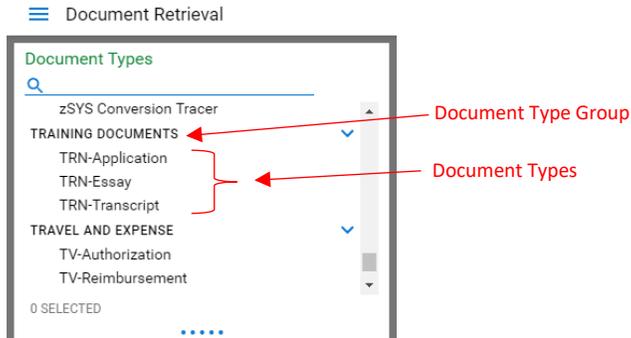


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2. Select **Document Type Groups** and/or **Document Types**.

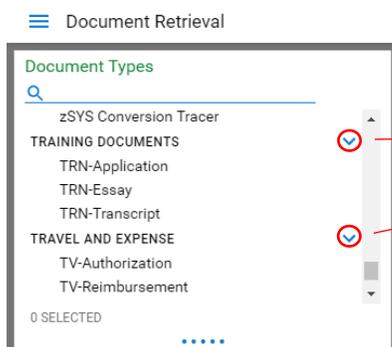
On the left-hand side of the page, a list of all *Document Type Groups* and *Document Types* you have access to will be displayed.

***Note:** Document Types are indented and listed beneath Document Type Group headers.

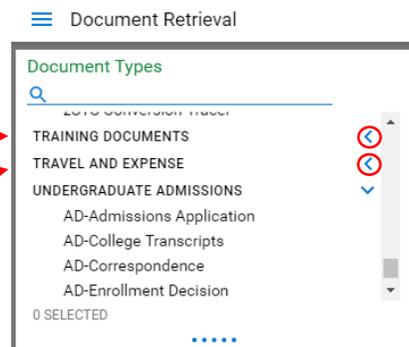


Use the arrow to the right of the Document Type Groups to expand or collapse the list of Document Types.

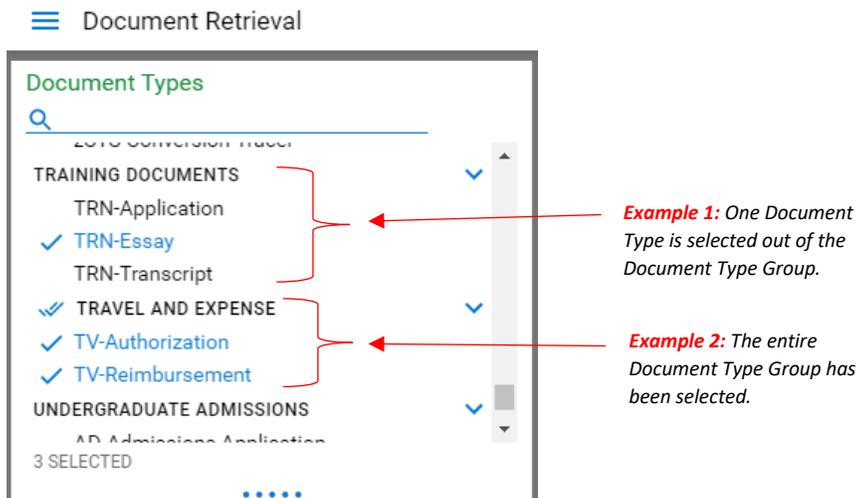
Expanded



Collapsed



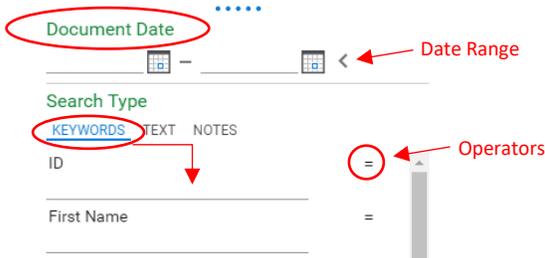
Select one or multiple Document Type Groups and/or Document Types at a time. To select multiple, hold the CTRL key while clicking the Document Type Groups and/or Document Types.



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3. Refine your search using **Keywords** and **Date Range**.

Keywords are identifiers that assist in narrowing a search and vary by Document Type. Additionally, various keyword *operators* are available by clicking the operator tile to the right of the keyword field.



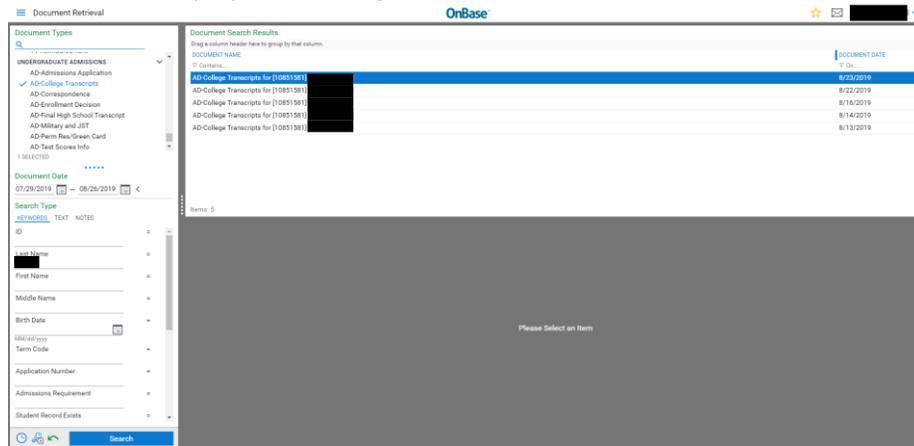
Available keyword operators and wildcard characters include:

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
Wildcard Character	Description
*	Replaces <u>multiple</u> characters. This can make the search function as a begins-with search if used at the end of your entry.
?	Replaces <u>one</u> character.

4. At the bottom of the Document Retrieval section, click **Find** to search your selected criteria.



A list of results will be displayed to the right under **Document Search Results**.



5. Double click on an item to view the document.