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 <u>https://trailhead.mines.edu</u> 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

OTRAILHEAD .MINES		
LOG IN TO TRAILHEAD	Constanting Outpress #60 Minimitation Constant	
User Name:	Velocence to Trailhead Trailhead is a score port that privide students, faculty, staff and affliates with access to multiple institutional resources of services and information. It is used by users to check personal information, view accounts and stay in touch with peers. Students use it to erroll in counters, check gravity, wire francial ads, and view billing accounts. Procing can be clear tratters, communicate with audents and gost protes.	
Password:	What's Inside?	
	👌 Registration, grades, academic profile, transcripts, financial aid, pay fees & more	
Earoot.cassword? LOGIN clear	Personnel Change Note After you change your password, wait at least ten minutes before you log into Trailhead. It takes up to ten minutes after a password change for the change to be propagated to Trailhead.	
Important! "Don't forget to sign out when finished. Never leave your Trailhead session unattended."		

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.

Document Retrieval	OnBase	<u>1</u>
Document Types		
ACADENIC AFFAIRS AA-Academic Faculty Handbook AA-College Transcripts AA-Contects AA-Contects AA-Contects AA-Correspondence AA-CV		
AA-racuty Evaluations AA-international Travel Log 0 SELECTED	•	
Document Date		
KEYWORDS TEXT NOTES	: Nothing to deplay	
ල 🔏 🗠 Search		



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Retrieve a Document

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

 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 <u>expand</u> or <u>collapse</u> the list of Document Types.



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	Description
Character	
*	Replaces multiple 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.

