

Training Manual

OnBase Web Client

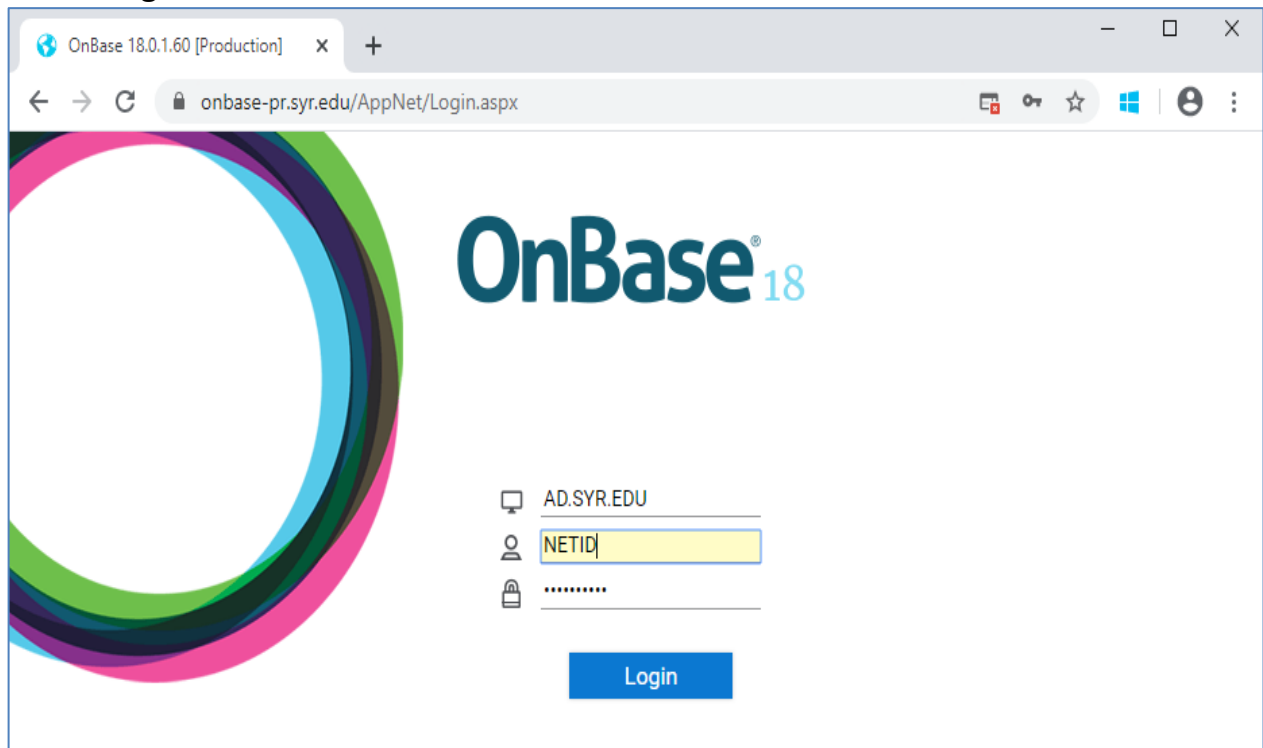
January 5, 2021

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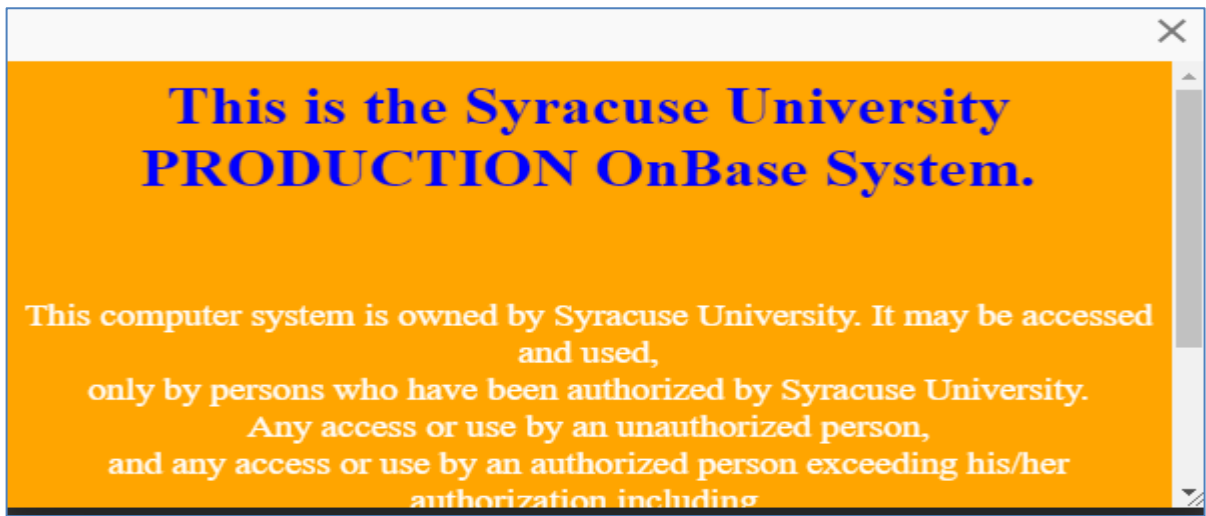
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Login Screen

- URL: onbase.syr.edu
- **User Name:** Enter User ID (Netid)
- **Password:** Enter Password
- Select Login




- You will come to the following page upon signing in.
- Close this by selecting X.
- Be sure to turn pop up blocker off, if requested.
-

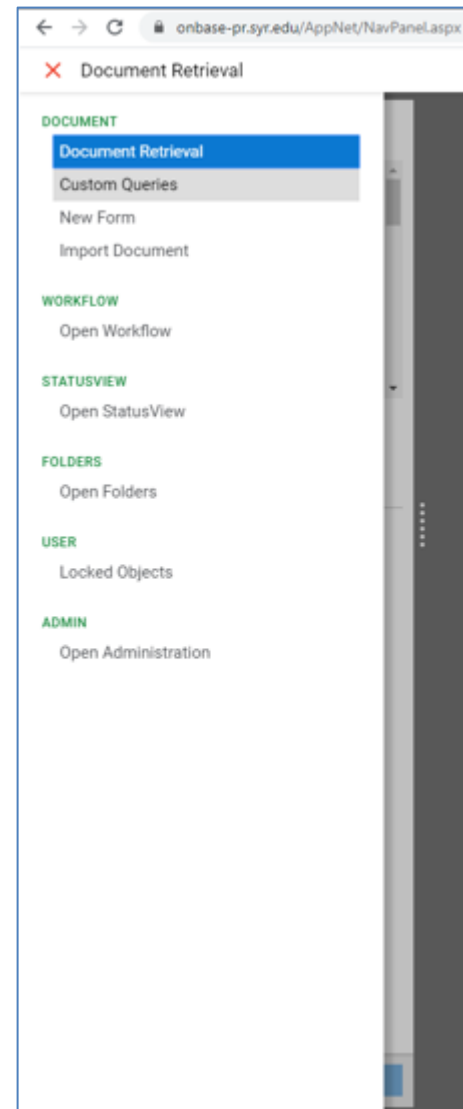
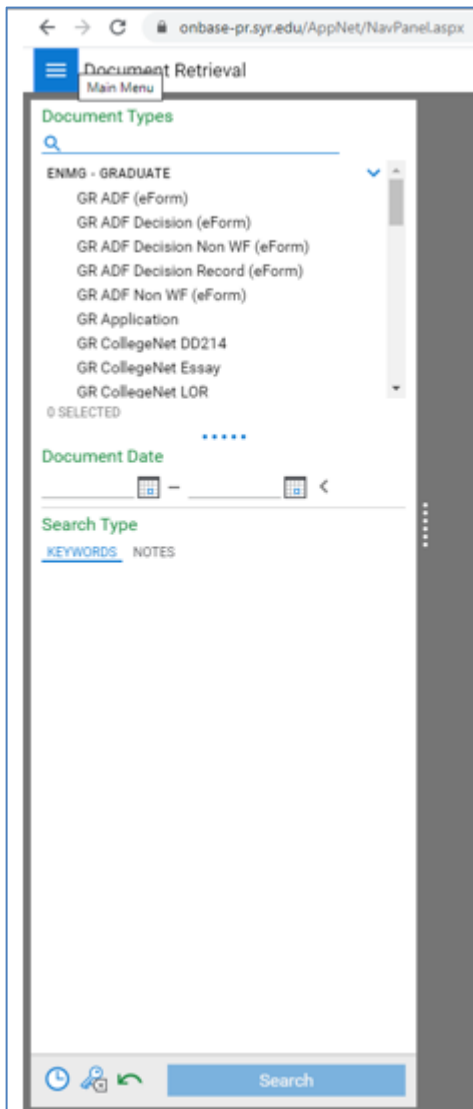


Navigation

Become familiar with the Navigation. It defaults to [Document Retrieval](#).

Use the [Main Menu](#) icon  to navigate.

Navigation



Document

o Document Retrieval

- a. This allows for retrieving a single document, or multiple documents based on common keyword values.
 - i. Select the Document(s).
 - ii. Enter the keyword value(s).
 - iii. From the bottom, select [Search](#).

The screenshot displays the 'Document Retrieval' interface. At the top, there is a search bar under 'Document Types' with a magnifying glass icon. Below it, a list of document types is shown, with three items selected: 'GR ADF (eForm)', 'GR ADF Non WF (eForm)', and 'GR Application'. The text '3 SELECTED' is visible. Below the list is a 'Document Date' section with a date range selector. The 'Search Type' section has two tabs: 'KEYWORDS' (selected) and 'NOTES'. Below this, various search criteria are listed with input fields and dropdown menus, each followed by an equals sign. The 'EmplID' field contains the value '123456789', which is highlighted in yellow. At the bottom, there is a blue 'Search' button and a navigation bar with icons for back, forward, and search.

o Custom Queries

- This allows for retrieving a set of pre-defined documents.
(ie: entire student folder)
- Navigate to [Document > Custom Queries](#)
- A list of queries will appear on the left hand side.
- Select the Query.
- Enter the keyword value(s).
- Select [Search](#).

Custom Queries

Query Types

GR-ADF Decision Record
GR-Reviewer
 GR-Reviewer-By ADF (Non WF)
GR-Reviewer-By Applicant
GR-Reviewer-Retrieve New Docs

[SHOW INSTRUCTIONS](#)

Search Type

[KEYWORDS](#)

AdmitTerm 1211 <>
AdmitType =
AcadProgram =
AcadPlan =
AcademicGroup A&S =
EmplID =
ProgramStatActDt =

[Search](#)

Note: Select [Show Instructions](#), for more information about this specific query.

Search for: GR ADF Non WF (eForm)

[HIDE INSTRUCTIONS](#)

- Results

Custom Query Results					
Drag a column header here to group by that column.					
DOCUMENT TYPE	ADMITTERM	ACADEMICGROUP	ACADPROGRAM	ACADPLAN	PROGRAMAC...
∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...	∨ Contains...
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL
GR ADF Non WF (eForm)	1173	A&S	AR33M	AR33MA	APPL

- Working with Search Results

- Size the Headers

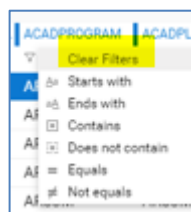
- Expand or minimize the header size of the columns by dragging the blue line | that separates the keywords.

- Sort - Alphabetize by Header

- Click on AcadPlan – Sorts by Alpha

- Filter

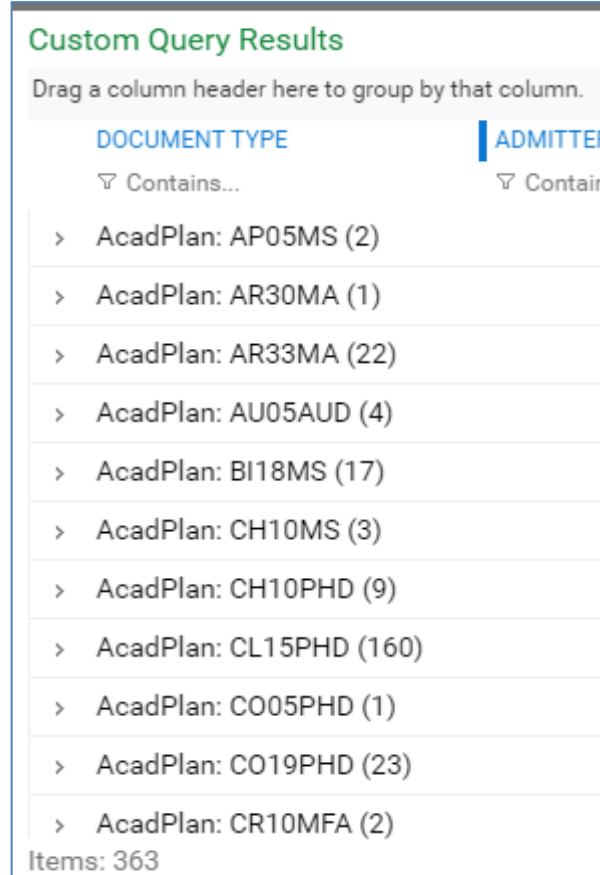
- Enter a desired keyword value in the Header.
 - Example AR33M.
 - Only filtered results will display.
 - Can enter a filter on multiple keyword values to further reduce results.




- To remove the filter, select Clear Filters.

- **Group by Area**

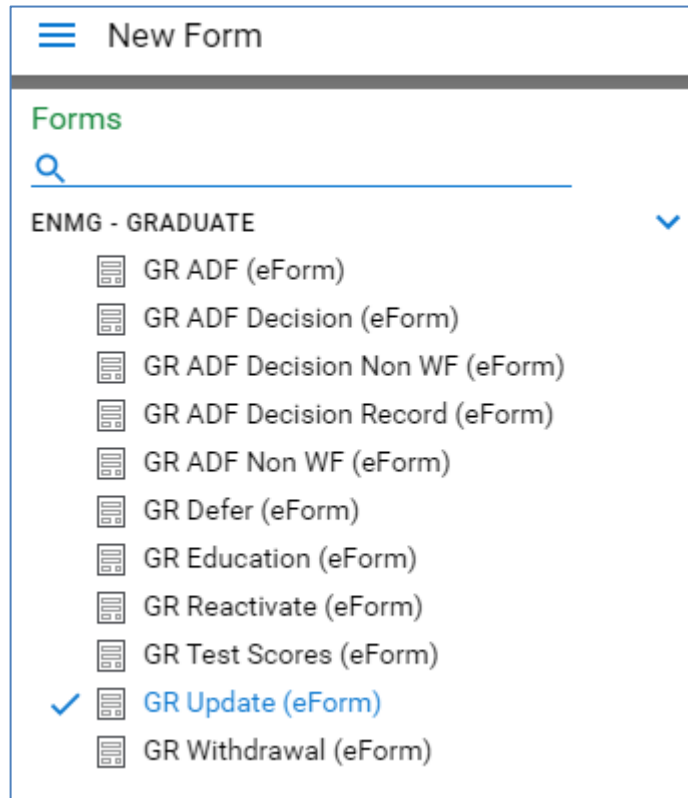
- Drag a desired keyword up to the “**Group by Area**” to create sub folders. Try AcadPlan.



- To remove, select the **X** on the group by keyword  from the upper right.

New Form

- a. This allows for creating a new form to send to Enrollment Management.
- b. Select the Document.



The screenshot shows a web interface titled "New Form". Below the title is a search bar with a magnifying glass icon. Underneath the search bar, the category "ENMG - GRADUATE" is displayed with a downward arrow. A list of forms follows, each with a document icon and a blue checkmark next to it:

- GR ADF (eForm)
- GR ADF Decision (eForm)
- GR ADF Decision Non WF (eForm)
- GR ADF Decision Record (eForm)
- GR ADF Non WF (eForm)
- GR Defer (eForm)
- GR Education (eForm)
- GR Reactivate (eForm)
- GR Test Scores (eForm)
- GR Update (eForm)**
- GR Withdrawal (eForm)

- c. It opens to the right of the navigation panel.
- d. Complete the form, as required.

Exiting OnBase

- From the upper right corner, select the down arrow next to your user name.
- Select [Logout](#).

