**Using the OnBase Web Client**

### Logging into OnBase

Go to the [myUAB Portal](#) and Select **OnBase**.

You may be prompted to enter your **BlazerID** and **strong password** to login.

### Setting Custom Queries as the Default Search Engine

Click the **Main Menu** (hamburger icon) located to your left.

Click **Custom Queries**.

Click the **Favorites** (star icon) located to your top right.
Click **Add to Favorites**.

Click **OK**.

Click the **Favorites** (star) icon and then **Edit Favorites**.

Click the **Home** icon that appears next to the Custom Queries listing.

The icon will turn blue to indicate that this favorite is on the homepage.

Click **Save and Close**. The Custom Queries panel will now be the default search engine when you log into OnBase.
Performing a Search in OnBase

Go to the Custom Queries panel and select your desired document type.

Enter your search criteria.

Click the Search button.
Your search results will appear in the pane at the top right. A viewing pane will appear to your bottom right.

Adjust the sizes of the panes by dragging the pane(s) up or down.

**Filtering Your Search Results**

Enter a value in one of the fields beneath the column name.

To remove the filter, click on the filter icon and then select Clear Filters.

**Sorting Search Results**

Click on the desired column name. An up arrow will appear to indicate Sorted Ascending.

Click the column name again for down arrow/Sorted Descending.
Grouping Search Results

Drag the desired column name to the area that appears directly above the columns.

The results will then be grouped according to the selected search criteria.

Click on the arrow next to each group listing to find the individual search results.

To clear the grouped listing view:
- Find the column name in the upper right corner of the Search Results pane
- Move the mouse pointer to the right of the column name.
- Click the X that appears next to the column name.

Viewing Backup Documentation in OnBase

To view attached documentation in the Viewing Pane:
- From the Query Results list, double click the desired listing
- You will see any attached documentation below, in the Viewing Pane
To open attached documentation in a New Window:

- Right Click the desired listing.
- Click Open in New Window

If the documentation is formatted as a PDF or image, you will see a screen similar to the one shown.

If the documentation is formatted as a Microsoft file, you will see a link that allows you to download the content for viewing as shown.

Note: When using the Chrome browser, the document may download automatically. To view the downloaded document:

- Click the down arrow to open the Recent downloads list.
- Click the file name to open the document.
Creating New Queries in OnBase

Go back to the Custom Queries panel, update your search criteria, and then click on the Search button.

Click on Clear All to start a search with a blank slate.

Logging Out of OnBase

Click your name in the top right corner of the screen and then Logout.