Using the OnBase Web Client

The OnBase Web Client is a **view-only** portal that enables users to search for backup documentation related to Oracle Finance documents created since **August 17, 2020**.

### Logging In

<table>
<thead>
<tr>
<th>![Warning Symbol]</th>
<th>It is recommended that you use <strong>Google Chrome</strong> as your browser when using the OnBase Web Client.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Go to the UAB Administrative Systems homepage and click on the OnBase button.</strong></td>
<td><img src="image" alt="OnBase Web Client Homepage" /></td>
</tr>
<tr>
<td>2. You may be prompted to enter your BlazerID and strong password to login. Enter your information here.</td>
<td><img src="image" alt="Login Screen" /></td>
</tr>
</tbody>
</table>
## Setting Custom Queries as the Default Search Engine

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

   ![Main Menu Icon](image)

   - Document Retrieval
     - Custom Queries
     - Import Document

2. Click on **Custom Queries**.

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

4. Click on **Add to Favorites**.

5. Click on the **OK** button.
6. Click on the **Favorites** (star) icon and then click on **Edit Favorites**.

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

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

8. Click on the **Save and Close** button.

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

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

2. Enter your search criteria.

3. Click on the blue **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

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

   ![Custom Query Results](image)

   - **SUPPLIER NAME**
   - **SUPPLIER NUMBER**
   - **PAYMENT REQUEST NUMBER**
   - **PAYMENT REQUEST TYPE**
   - **DOCUMENT DATE**

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

   ![Custom Query Results](image)

Sorting Results

Click on the desired column name.

An arrow will appear to indicate sorting either **Sorted Ascending** (up arrow) or **Sorted Descending** (down arrow).
Grouping Results

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

2. 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.

3. To clear the grouped listings view, locate the column name in the group by area and then click on the x that appears next to the column name.
Viewing Backup Documentation in OnBase

1. If there is more than one query result, double-click on the desired listing to view the attached documentation in the viewing pane.

Or, if you prefer, right-click on the desired listing and then click on **Open in New Window** to view the documentation in a large window.
If the documentation is formatted as a pdf or image file you will see a screen similar to the one shown.

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

**Note:** When using Google Chrome as your web browser, the document may download automatically and appear at the bottom of the screen.

Click on the file name to open the document.
Creating New Queries in OnBase

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

2. Or you can click on Clear All (green back arrow) to start a search with a blank slate.

Logging Out of OnBase

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