

# OnBase Quick Reference Guide

## Graduate Contract – Document Retrieval, Custom Query and PDF Packet Creation

This guide offers the following instructions (using the OnBase Unity Client from your desktop):

1. How to locate a graduate contract and/or related documents using Document Retrieval
2. How to locate a graduate contract and/or related documents using a Custom Query
3. How to create a PDF Packet of the Graduate Contract

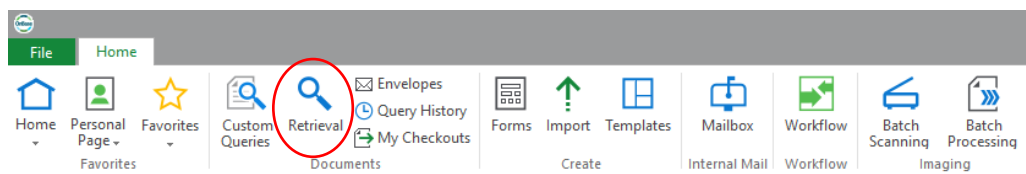
**Note:** For information on Graduate Contract policies, visit the Graduate Assistantship website (<https://www.mines.edu/graduate-studies/graduate-assistantship/>). For a high-level overview of the entire graduate contract process, see the Graduate Contracts Process Flow PDF.

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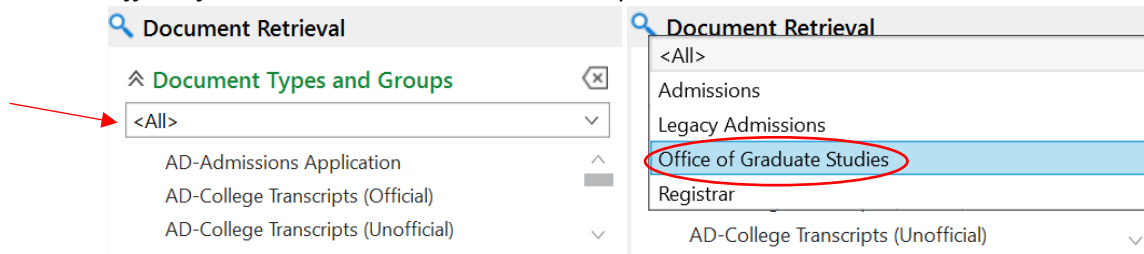
### Locate a Graduate Contract/Related Documents - Document Retrieval

Perform the following steps to locate a graduate contract and/or related documents using Document Retrieval in the OnBase Unity Client from your desktop.

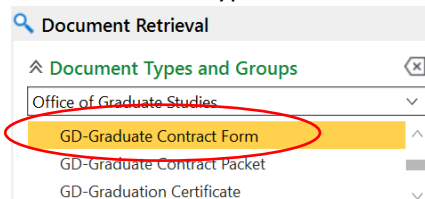
1. From the homepage toolbar (located at the top of the screen), click on the **Retrieval** icon.



2. Under the **Document Types and Groups** header, click on the drop-down menu and select the *Office of Graduate Studies* Document Group.



3. Locate the *Graduate Contract Form* document type from the list.



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4. Search by any of the criteria listed and click **Find**.

Document Retrieval

Search Results: 4 Document(s)

Icon	Revision #	Name	Type	Date
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020

Document Viewer

All documents that match the search criteria will display on the right-hand side of the screen.

5. Select a document and click on **Document Viewer** to display the document at the bottom of the screen. *Note: Double-click the document to open a separate window.*

📄

Icon	Revision #	Name	Type	Date
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020
📄		██████████ - 202010, Spring 2020 - ██████████	GD-Graduate Contract Form	7/14/2020

🔍 Document Viewer

██████████ 202010, Spring 2020 - ██████████

## GD-Graduate Contract Form

Student Details

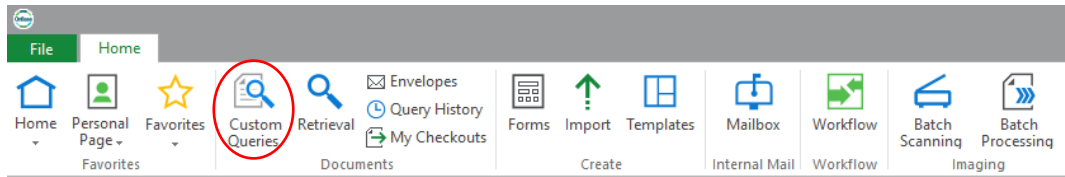
Student CWID*	First Name	Last Name
██████████	██████████	██████████
Email Address	Student Level	Student Department
██████████	GR	MT, Metallurgical & Mat
PIDM	Residency Status	Academic Standing
██████████	Non-Resident	Good Standing
Existing Employee	Eligible for Reduced Registration	Admit Term
I	N	201810

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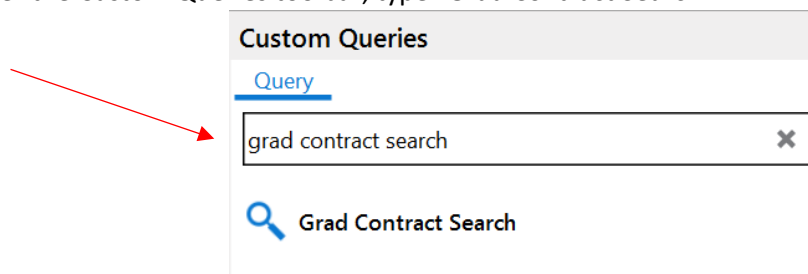
## Locate a Graduate Contract/Related Documents – Custom Query

Perform the following steps to locate a graduate contract and/or related documents using a Custom Query in the OnBase Unity Client from your desktop.

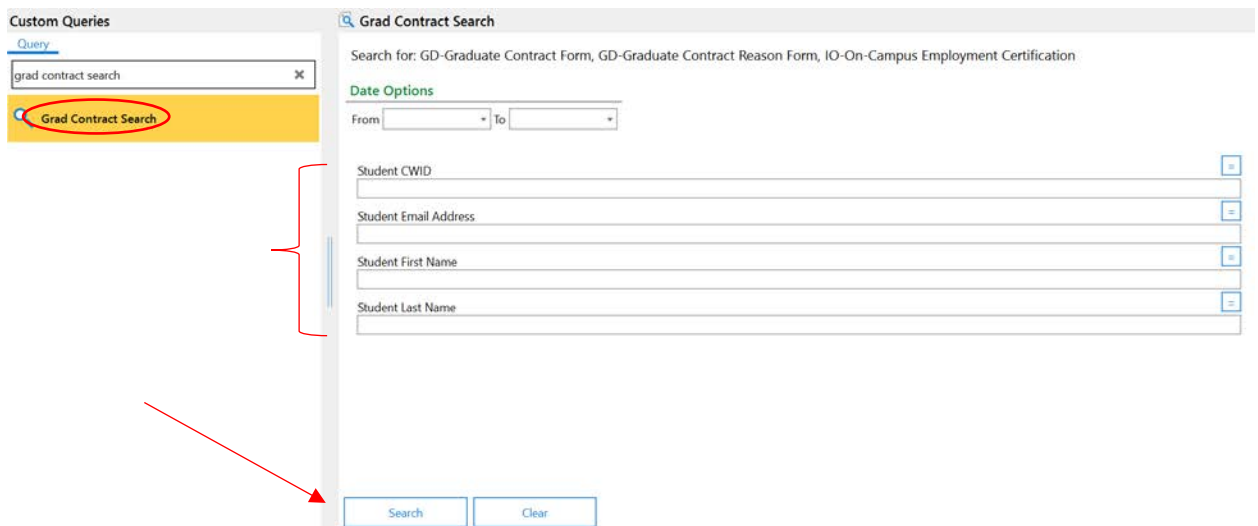
1. From the homepage toolbar (located at the top of the screen), click on the **Custom Queries** icon.



2. Under the Custom Queries toolbar, type *“Grad Contract Search”*.



3. Select Grad Contract Search and a search criteria section will appear on the right-hand side of the screen. Search by any of the criteria listed and click **Search**.



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All documents that match the search criteria will display on the right-hand side of the screen.

*Note: Additional filtering and sorting options are available (see Custom Query Training Video in Skillsoft for details).*

Custom Queries

Query

grad contract search

Grad Contract Search

Grad Contract Search - Search Results: 1 of 4 Document(s) Selected

Grad Contract Search

group by area Drag a field here to group by that field

Icon	Student CWID	Term Code [Dropdown]	Student First Name	Student Last Name	Department
	10721662	202010, Spring 2020	MILAN	AGNANI	
	10721662	202010, Spring 2020	MILAN	AGNANI	
	10721662	202010, Spring 2020	MILAN	AGNANI	
	10721662	202010, Spring 2020	MILAN	AGNANI	

Document Viewer

6. Select a document and click on **Document Viewer** to display the document at the bottom of the screen. *Note: Double-click the document to open a separate window.*

Grad Contract Search - Search Results: 1 of 4 Document(s) Selected

Grad Contract Search

group by area Drag a field here to group by that field

Icon	Student CWID	Term Code [Dropdown]	Student First Name	Student Last Name	Department
	[REDACTED]	202010, Spring 2020	[REDACTED]	[REDACTED]	

Document Viewer

[REDACTED] - 202010, Spring 2020 - [REDACTED]

## GD-Graduate Contract Form

Student Details

Student CWID*	First Name	Last Name
[REDACTED]	[REDACTED]	[REDACTED]
Email Address	Student Level	Student Department
[REDACTED]	GR	MT, Metallurgical & Mat

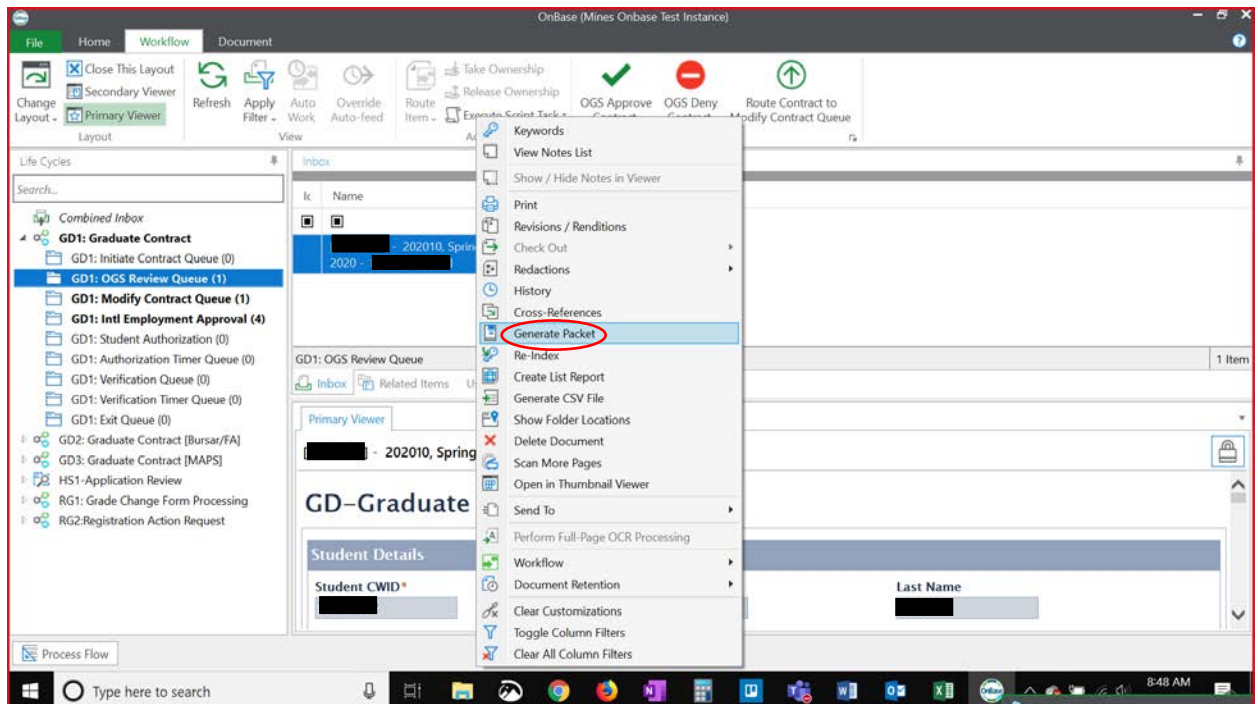
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## Create a PDF Packet of the Graduate Contract

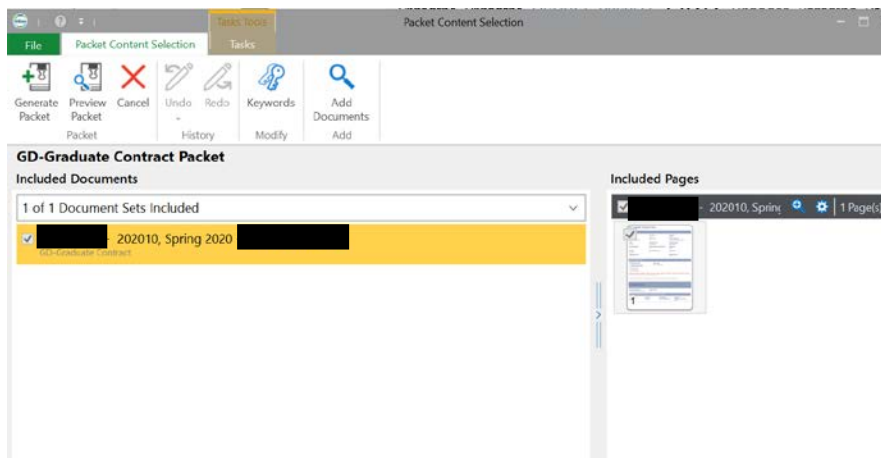
Perform the following steps to create a PDF Packet of the Graduate Contract using the OnBase Unity Client from your desktop.

1. A PDF Packet can be created within any OnBase interface of the contract, including Workflow, Custom Query and/or Document Retrieval (see instructions above to locate a contract)

Upon locating the contract, right-click on a graduate contract and select **Generate Packet**.

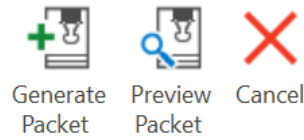


2. A popup window will appear. Click on the contract (it will highlight in yellow).

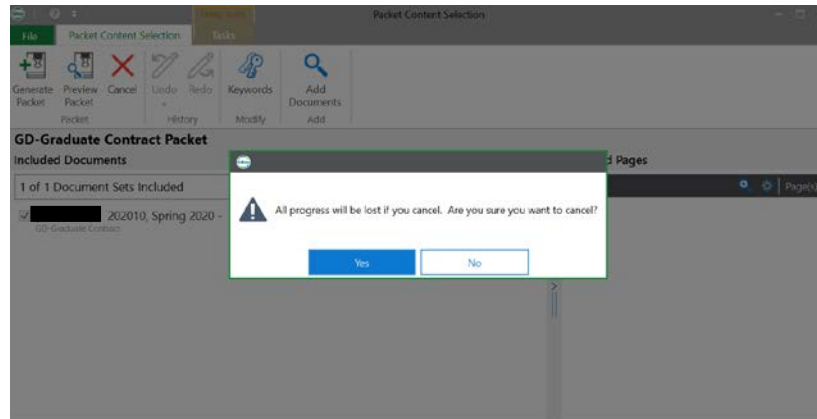


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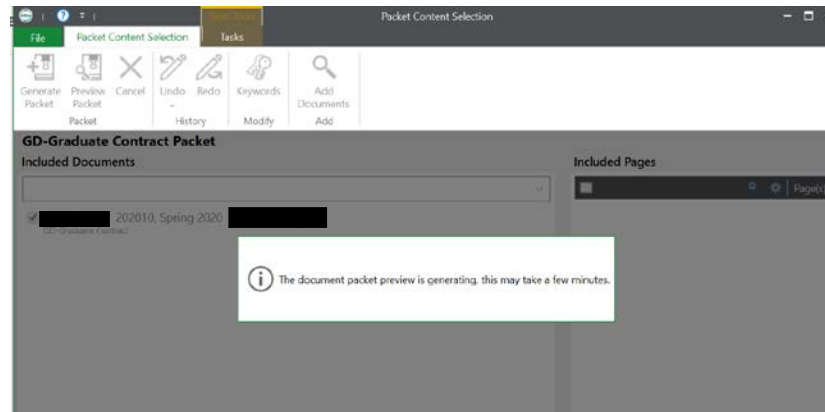
3. Select one of the following options from the toolbar:



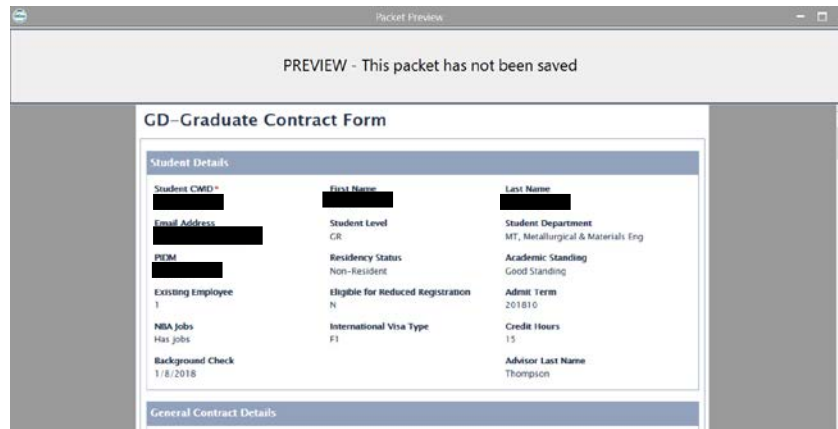
a. **Cancel** – Select this option to cancel the packet creation and close the window.



b. **Preview Packet** – Select this option to preview a sample of the PDF.

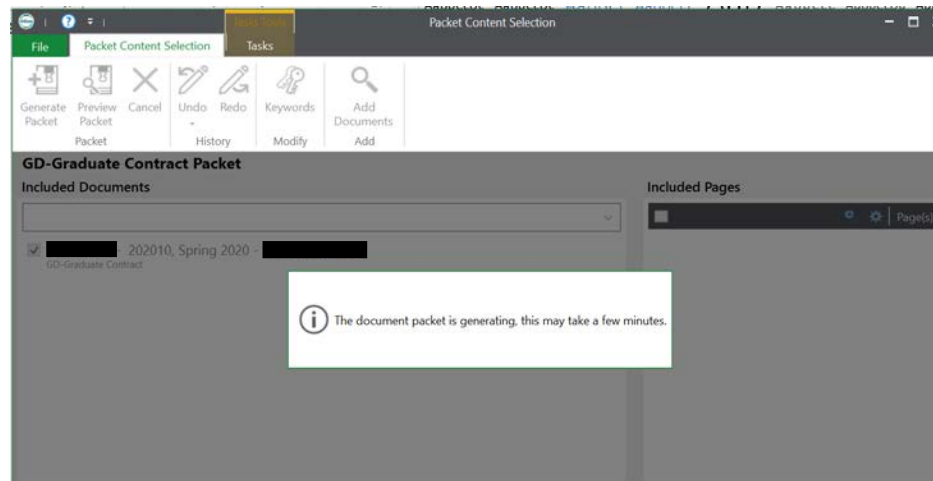


The preview may take a few minutes to generate.



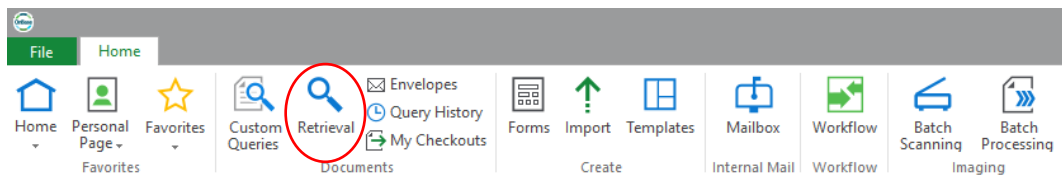
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- c. **Generate Packet** – Select this option to generate the PDF packet.

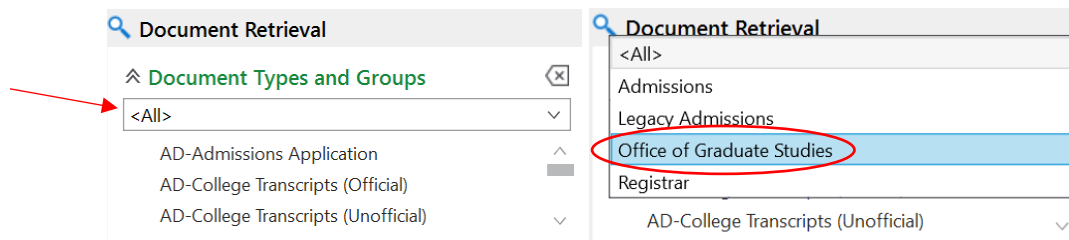


The preview may take a few minutes to generate. Upon packet creation, the popup window will disappear.

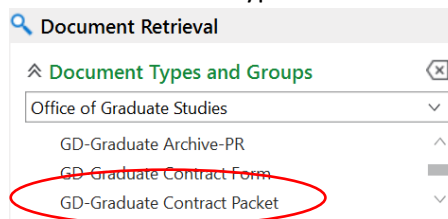
- 4. Now that the PDF has been generated, you will need to retrieve it. From the homepage toolbar (located at the top of the screen), navigate to document retrieval by clicking on the **Retrieval** icon.



- 5. Under the **Document Types and Groups** header, click on the drop-down menu and select the *Office of Graduate Studies* Document Group.



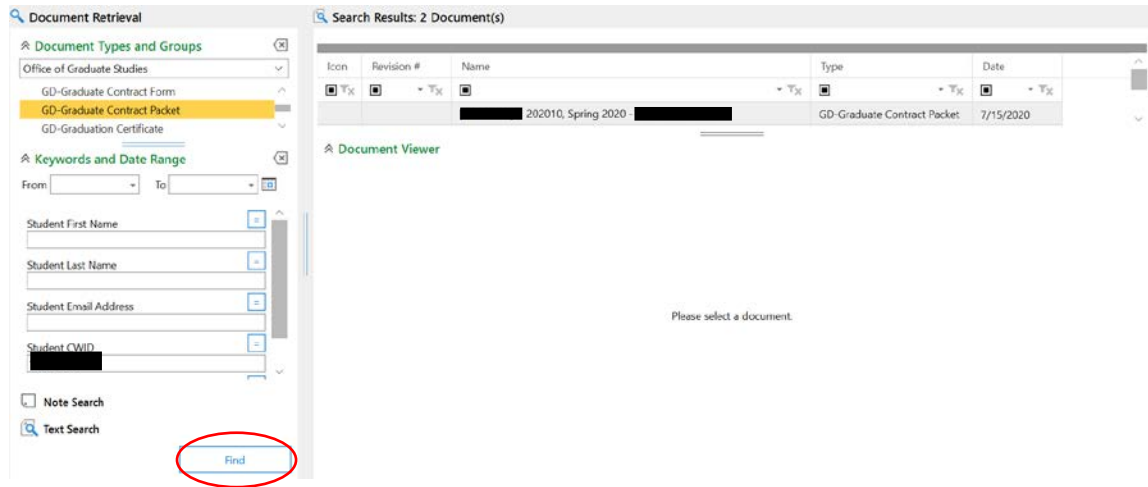
- 6. Locate the *Graduate Contract Packet* document type from the list.



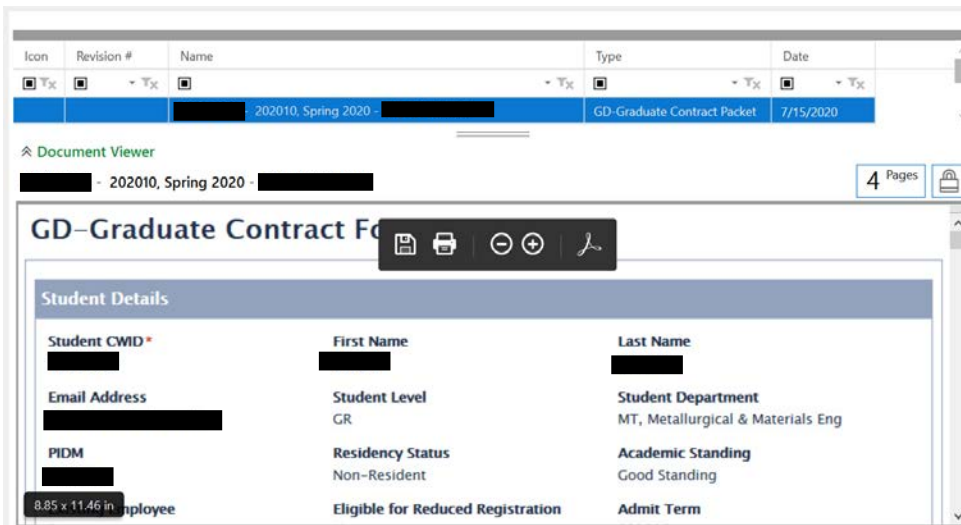
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7. Search by any of the criteria listed and click **Find**.

All documents that match the search criteria will display on the right-hand side of the screen.



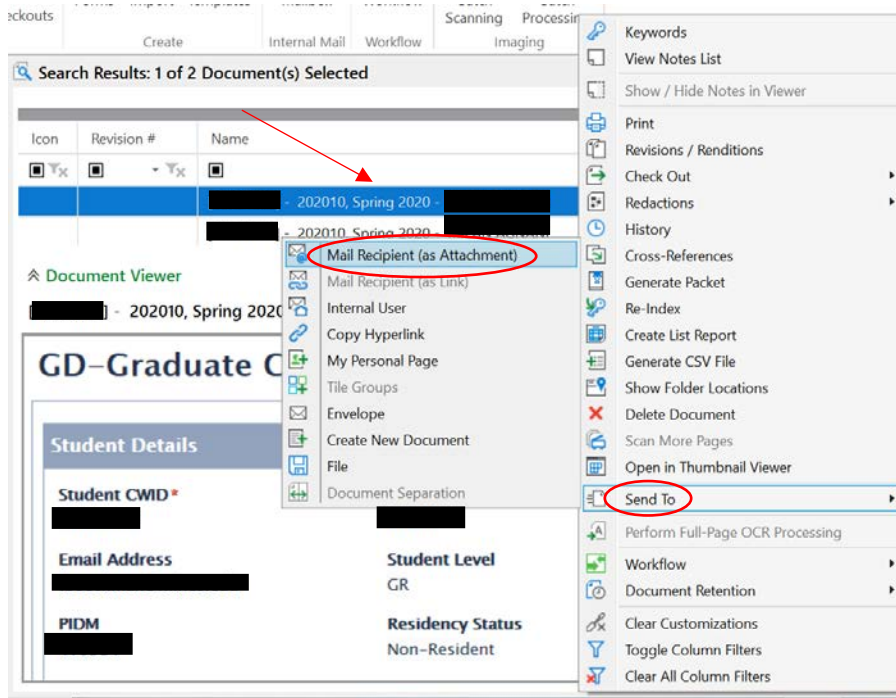
8. Select a document and click on **Document Viewer** to display the document at the bottom of the screen. *Note: Double-click the document to open a separate window.*





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- To send the PDF via email, right-click on the packet and select **Send To** and **Mail Recipient (as Attachment)**.



An Outlook popup window will appear. Enter the desired email address and message, and press **Send**.

