

## Retrieving Documents

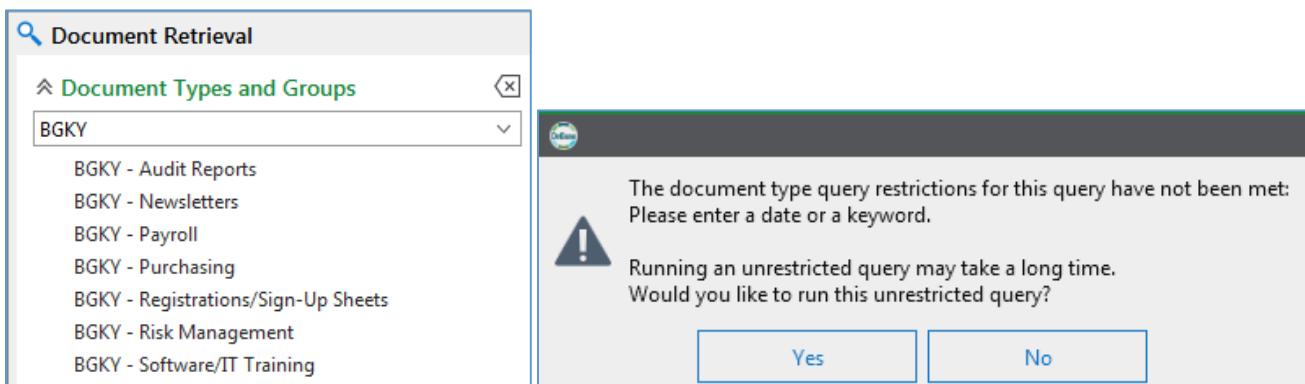
### How to Search for Documents



#### 1. Open the Retrieval Screen :

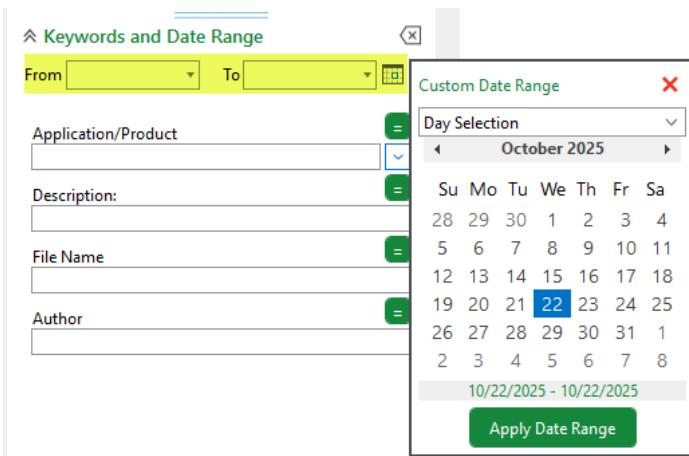
Click the Retrieval icon . To narrow results, select a Document Type Group and choose one or more Document Types (hold Shift or Ctrl to select multiple). Clicking the Find button will show you ALL documents of that document type.

**Note:** Searching only by document type (with no other criteria) may return too many results and trigger a warning.



#### 2. Search by Date Range:

Use the calendar icon to the right of the dates or use the drop-down box to select the current day, month, or year. This searches by the document type that was entered when the document was first saved.



#### 3. Search by Keywords:

Available keywords depend on the selected document types. If multiple types are selected, only shared keywords appear.

Example: Selecting **Correspondence** document type (with keyword **Recipient** keyword) and **Budget** document type (without **Recipient** keyword) removes that option.

#### 4. Full Text Search:

Enter text in the **Search Text** field at the bottom. This searches all words in each document and is slower than keyword searches. Hover over the question mark (?) for full-text tips.

#### 5. Additional Options:

- **Wildcard and Operators:**

1. To get the best results, use asterisks for partial matches: \*MEDICAL\*
2. You can change keyword operators (ie. “NOT EQUAL TO”) to refine results. The example shown below would search for documents but NOT include any that had an author of HALLB17.

Author	<input type="text" value="HALLB17"/>	<input type="button" value="&lt;&gt;"/>
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3. Double-click a keyword name to add duplicate fields (e.g., search Year 2017 OR 2018). When using duplicate fields, be sure to change the operator from AND to OR.

Description:	<input type="text"/>	<input type="button" value="="/>
	<input type="button" value="Or"/>	
Description:	<input type="text"/>	<input type="button" value="="/>

- **Reset Search Criteria:**

1. Click the **Clear Selection** icon to reset search criteria.

Keywords and Date Range

From	<input type="text"/>	To	<input type="text"/>	<input type="button" value="X"/>
<input type="button" value=""/>				
<input type="button" value=""/>				
<input type="button" value=""/>				

- **Select All Document Types:**

1. Press Ctrl+A to select all document types within a group.

- **Sorting, Filtering, and Grouping:**

Search result columns can be rearranged by dragging and dropping them to a new position. You can click on a column heading to sort the documents by that column (name, document type or document date).

1. Rearrange or sort results by clicking column headers.

Search Results: 1 of 7 Document(s) Selected			
Icon	Name	Type	Date
<input type="checkbox"/>  	[3] 2/15/2018 - ADMCOM - Agenda Packet - BOARD OF ETHICS	ADMCOM - Agenda Packet	2/15/2018
<input type="checkbox"/>  	[1] 2/13/2018 - ADMCOM - Agenda Packet - AUDIT	ADMCOM - Agenda Packet	2/13/2018
<input type="checkbox"/>  	[1] 2/13/2018 - ADMCOM - Agenda Packet - JOB DEVELOPMENT INCENTIVE PROGRAM	ADMCOM - Agenda Packet	2/13/2018

2. Filter results by typing below a column header; clear filters using the icon at the end of the field .

Search Results: 3 Document(s) matched of 7 found			
Icon	Name	Type	Date
<input type="checkbox"/>  	audit	ADMCOM - Agenda Packet	2/13/2018
<input type="checkbox"/>  	[1] 2/1/2018 - ADMCOM - Agenda Packet - AUDIT	ADMCOM - Agenda Packet	2/1/2018
<input type="checkbox"/>  	[1] 1/2/2018 - ADMCOM - Agenda Packet - AUDIT	ADMCOM - Agenda Packet	1/2/2018

3. Drag a column to the “Group By” area to group results (multiple levels supported).

Search Results: 31 Document(s)			
group by area		Type	
Icon	Name	Type	Date
<input type="checkbox"/>  	[3] 2/15/2018 - ADMCOM - Agenda Packet - BOARD OF ETHICS	ADMCOM - Agenda Packet	2/15/2018
<input type="checkbox"/>  	[1] 2/15/2018 - ADMCOM - Miscellaneous - SALARY TASKFORCE	ADMCOM - Miscellaneous	2/15/2018
<input type="checkbox"/>  	[1] 2/13/2018 - ADMCOM - Miscellaneous - JOB DEVELOPMENT INCENTIVE PROGRAM	ADMCOM - Miscellaneous	2/13/2018
<input type="checkbox"/>  	[1] 2/13/2018 - ADMCOM - Miscellaneous - POLICE/FIREFIGHTER RETIREMENT FUND BOARD	ADMCOM - Miscellaneous	2/13/2018

## How to View or Open Documents

After running a search, your results will appear in a list. Each document’s name is customizable and may include multiple keywords (ie. “Year – Description”). To preview a document, select it and click the

Document Viewer dropdown to open the preview panel at the bottom . To open the document, double-click its name.

**Note:** If the Document Viewer is open, the document is already considered open for editing. Close the viewer before double-clicking to open it in its native application.

### 1. Editing & Conflicts:

- o If another user is editing the file, you can still open it but must save changes as a new document.

## 2. Full Text Search Results:

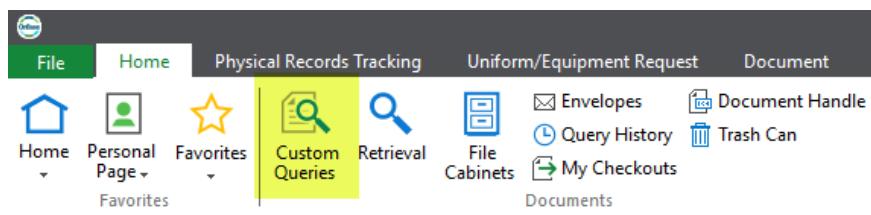
- If you try to open a document from the search result list the system will display a text version of the document highlighting where the search text was found.
- Results include a Score column ranking matches.
- Use the navigation bar to jump between found terms.
- Click Show Original Document to open the original document.

## How to View Recently Edited Documents

By default, there is a tile at the top of your Personal Page that you can click to view all Recently Edited Documents. Clicking this will show you the last 50 documents you've edited within the past 90 days. Double-click on any document to open it.

## How to Use Custom Queries

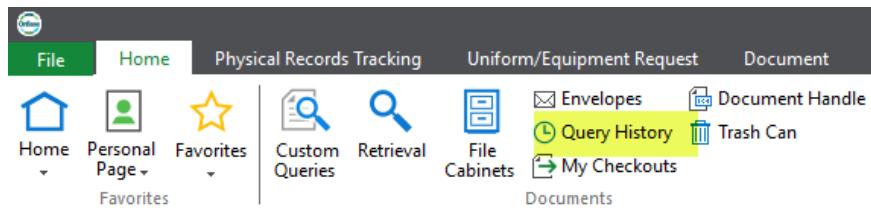
Custom queries are created by IT based on divisional needs to simplify frequent or complex searches. They work like saved searches and can be added to your personal page for quick access. Click the Custom Queries icon on the Home tab to see available options.



**Note:** Contact the Helpdesk if your division could benefit from a custom query.

## How to Use Query History (Previous Searches)

Query History lists all searches from your current session, allowing you to quickly rerun recent searches. Click the Query History icon on the Home tab to view your recent queries on the right. Select one to automatically rerun it.



**Note:** Query History clears when you log out of OnBase.

## How to View the History of a Document

Right-click a document in the search results and select History. If you are on the Document tab, you can select the History icon at the top of the screen. This displays the document's full history, including user name, date, time, and actions such as created, viewed, revised, printed, exported, or emailed.