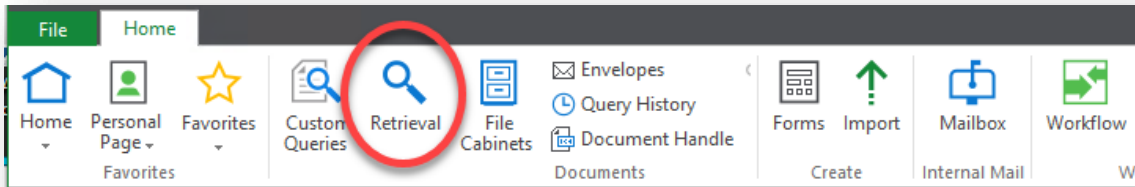
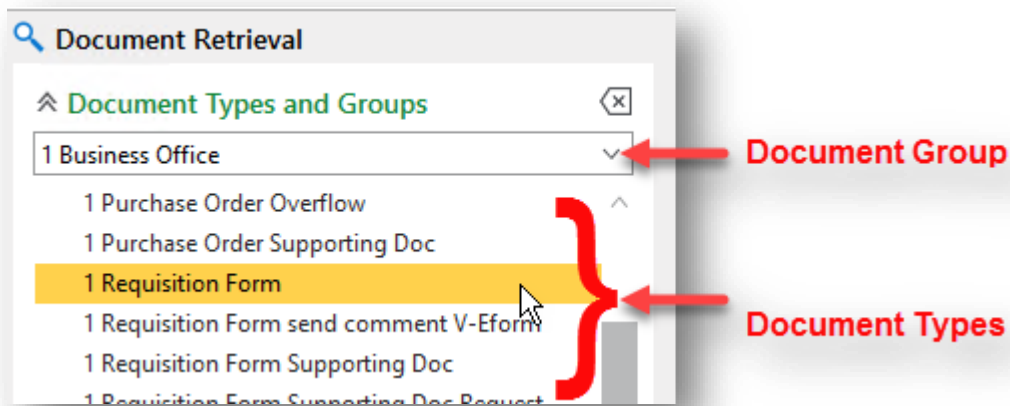


Basic Document Retrieval in the OnBase Unity Client

To find documents in the OnBase Unity Client, click the Retrieval Icon on the ribbon:

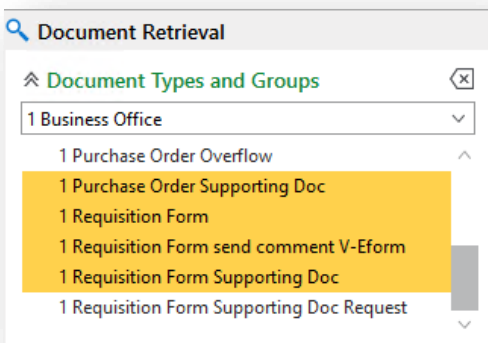


Choose the Document Group and the type:

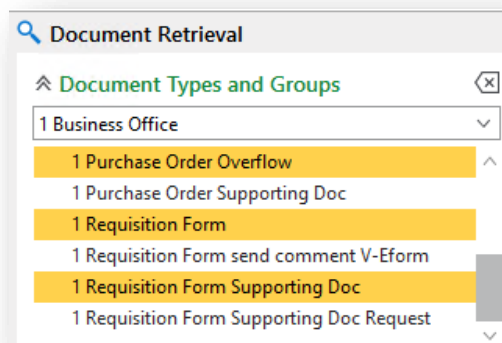


You can search multiple document types at once by holding the Shift Key to select a range of documents, or hold the Control Key and click the different document types you would like to search:

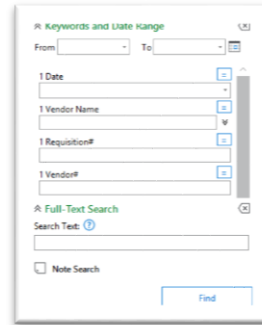
Shift Key to select a range of types



Control Key to select random types



Once you have selected the document type/s the Keyword Panel will open display the keywords used for indexing. For searches across multiple documents, only the common keywords will display.

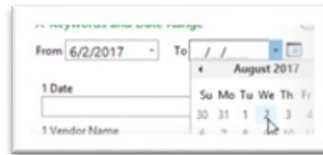


The search panel gives you the option to search for the document by:

- The date or date range that it was **added to OnBase**;
- Specific keywords that were used to index the document;
- A text search for words that might be on the document;
- Notes that might have been added to the document.

DATE RANGE SEARCH

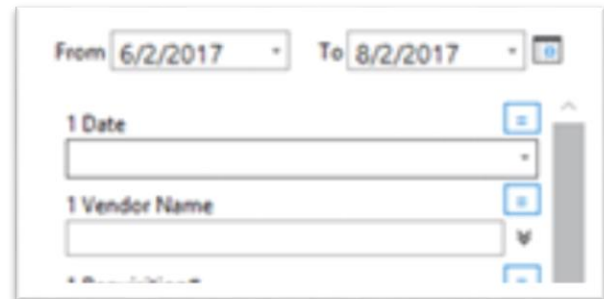
Date range searches allow you to select a range or a specific **date that the document entered OnBase**.



KEYWORD SEARCH

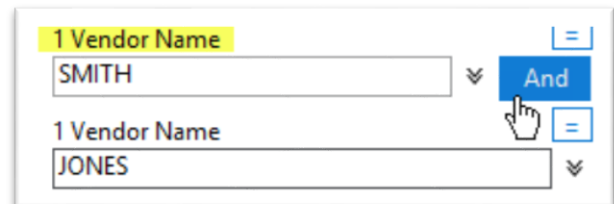
Searching by keywords will bring back the document types you selected that have been indexed with that exact keyword. You can search more than one keyword to narrow the results. For instance, enter both a date and a vendor name.

Note in the example, there is a date range option **and** a Date option. The difference is the date range search looks for the day the document **entered** OnBase. The Date field is the date that was on the document itself.



Additionally, you can broaden your search by opening a second instance of a field. An example would be If you want to find all checks written to Smith and to Jones, you would double click the label of the Vendor Name (highlighted in the image). That brings up a second search box.

Note the operators at the end of the search fields. You will also notice that some fields had drop down arrows to help you find keywords.

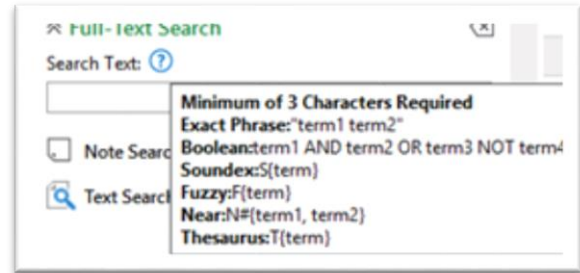


You can also use a wildcard (*). This is very helpful if you are unsure of the name or the spelling.



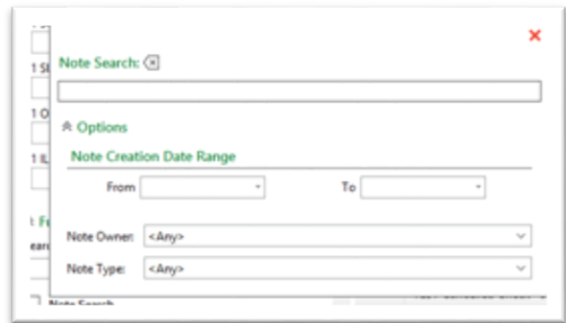
FULL-TEXT SEARCH

This option allows you to search by a word or term that is not an indexing keyword, but is on the document. Click the question mark to see a list of search options.



NOTE SEARCH

Similar to the Full-Text Search, a note search will look for a word or phrase on a note that was attached to the document.



Once you have entered your search parameters, click FIND and you will get a list (called a 'hitlist') of the documents that match your search. Just double click to open them.

Be careful to clear your searches, especially date ranges or note/text searches, before starting a new search!