**Finding Documents in OnBase**

**Using the Standard Search**

1. In the Document Retrieval window in OnBase, select the Document Type Group for the document.
2. When the Document Types are listed, select the Document Type you want to find. The Keywords appropriate to the selected document type are displayed. **Tip!** You can select multiple document types using Ctrl + click.
3. Select the date range to search for the document:
   a) In the From field, click the Today button to search for a document uploaded today, or click the Calendar button, locate the desired month, and click the desired day.
   b) In the To field, you can use the Calendar button, as in the From field, or click the Today button to search through the current date.

**Note:** The date fields identify the date when the document was uploaded into OnBase, which may or may not match the date of the document itself.

**Tip!** To search for documents uploaded on a single day, enter the same date in the From and To fields.

4. Enter values in the appropriate keyword field(s) to see all documents of the selected type that have been entered into OnBase and match those values. Use as many keyword fields as needed.

**Note:** To remove keywords before initiating a new search, click the Clear Keywords button to remove all previous keyword values. To remove all previous selections, including the Document Type Group, Document Type, and dates, click the Clear All button. Then enter your new search criteria.

5. Click the Find button. If only one document matches your search results, it is displayed.
6. If multiple documents match your search criteria, the list of matches will be displayed in the Document Search Results window.

**Finding Documents in Folders**

For some OnBase implementations, you can search for a document by navigating through folders.

1. Click the Open File Cabinets button (second from left in the toolbar).
2. **To find a folder in the Folder Tree**, click on each folder to open it, until you reach the folder you want.

The pane on the left lists the history of searches you have run during this OnBase session. To show the search results list from a previous search, click on the search in the history pane.

**Using a Custom Query**

1. In OnBase, select File > Open > Custom Query. The Custom Query window opens, with your custom query displayed.
2. Select a date range to be searched:
   - Click on a month in the Dates list, to search all documents loaded into OnBase in that month.
   - Click on the Calendar button next to the From and To fields to select a different date range.
3. Type a value in the keyword fields. Unless keywords are encrypted, you can use the * as a wildcard at either end of the value. Enter as many keywords as you need to find the document.
4. Click the Find button.
5. All of the documents that match your search criteria will be listed with their keyword values.

To see more of the keyword values, scroll right using the scroll bar at the bottom of the window, or resize the window by dragging the edge to the right.

To sort the documents by one of the keyword values, click the column header for the keyword by which you want to sort the documents.

6. To see a document, double click on the document line in the search results. The document opens in a new window, in the application for the file type. To return to the search results list, close the document window.

To find a folder in the Folder Tree, the folder hierarchy will be opened in the Folder Tree, with the folder that matches your search criteria highlighted in gray.

**Finding Documents in Folders**

For some OnBase implementations, you can search for a document by navigating through folders.

1. Click the Open File Cabinets button (second from left in the toolbar).
2. **To find a folder in the Folder Tree**...
When a list of documents that match your search criteria is displayed in the Document Search Results window, you can double-click on a document in the list to open it.

You can also click once on a document name, and then right-click to display a shortcut menu of additional actions. **Note:** The options that are active on your shortcut menu vary, depending on your authorization.

**To review keywords:**
If you aren’t sure which document in the list is the one you want, you can display the keyword values for the document by clicking once on the document name, and then selecting **Keywords** from the shortcut menu. You can change a keyword value here, if you see something that is not correct, but this does not re-index the document.

**To open multiple documents at once:**
You can also open multiple documents at once, if you aren’t sure which is the one you want. Press the Ctrl key and click on each document you want to open. Then right-click and select **View Selected**. The documents open in the appropriate application window.

**To re-index:**
If you see that a document has been indexed incorrectly, you can re-index the document, rather than deleting it and re-scanning it.
1. Click once on the document in the list to select it, and then right-click to display the shortcut menu.
2. Select **Re-Index**. The Re-Index Document window is displayed.
3. Make any necessary changes to the **Document Type Group**, **Document Type**, **File Type**, **Document Date**, and **Keywords**.
4. Click the **Re-Index** button.

**To send a document in an email:**
1. Click on the document, and then right-click and select **Send To** from the shortcut menu.
2. To send the document as an email attachment, select **Mail Recipient...** from the **Send To** menu.
3. Then complete the email address, subject line, and any explanation you want to include in the body of the email, and click **Send**.

**To delete a document:**
If you find a document that doesn’t belong in OnBase at all, you can delete it by clicking once on the document name, then right-clicking and selecting **Delete** from the shortcut menu. You will be prompted to verify that you really want to delete the selected document.