OnBase COMPLEX SEARCHES - QUICK REFERENCE GUIDE

RETRIEVAL USING COMPLEX SEARCH

1. Open the **OnBase Unity Client** and from the Documents Group select **Retrieval**

2. Select a **Document Type Group**

3. Select the **Document Type(s)** you would like to retrieve. To select multiple document types use **CTRL+Click** or **SHIFT+Click**
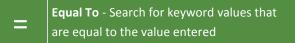
Note: When multiple Document Types are selected, **only the keywords they have in common** will be available for retrieval

4. To add multiple Search Fields of the same Keyword Type, **double click on the Keyword Label** OR from within the Keyword box and **press F6** (see example below, First Name field)

KEYWORD OPERATORS

Choices of Operators will depend on the format of the Keyword Type (alphanumeric, numeric, or date). **Left Click** on the Operator to toggle through the choices.

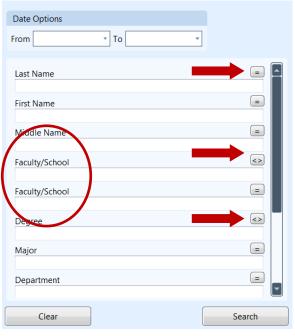|	
=	**Equal To** - Search for keyword values that are equal to the value entered
<>	**Not Equal To** - Search for keyword values that are not equal to the value entered
" "	**Double Quotes** - Search for keyword values with the literal string (exact match including spaces, letters/numbers) entered
>	**Greater Than** - Search for dates or numbers that are greater than the value entered
<	**Less Than** - Search for dates or numbers that are less than the value entered
>=	**Greater Than or Equal to** - Search for dates or numbers that are greater than or equal to the value entered
<=	**Less Than or Equal to** - Search for dates or numbers that are less than or equal to the value entered
AND	Use **AND** to search for two or more values of the same keyword type
OR	**OR** will search for either one or more keyword type values
TO	**TO** will search a date or number range value

CUSTOM QUERIES USING COMPLEX SEARCH

1. Open the **OnBase Unity Client** and from the Documents Group Select **Custom Queries**

2. Select a **Custom Query** from the list of queries

3. Complete the **Custom Query Form** with the necessary **search criteria**. As seen below, you can also use Keyword Operators in a Custom Query

4. To add multiple Search Fields of the same Keyword Type, **double click on the Keyword Label** OR from within the Keyword box and **press F6** (see example below, Faculty/School)

Note: You can use **wildcards** as substitutes for unknown characters (*) or for a single unknown character (?)