

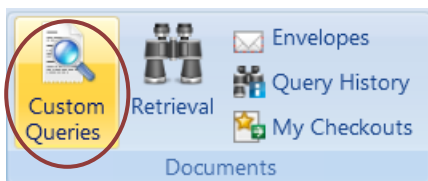
# OnBase CUSTOM QUERIES - QUICK REFERENCE GUIDE

## CUSTOM QUERIES

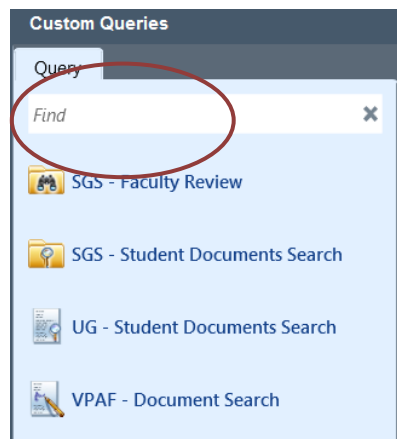
**OnBase Custom Queries** are pre-defined searches that have been configured for you so that you can quickly and easily retrieve, sort and group the documents you work with most often.

### To Use a Custom Query

1. On the Home Tab select **Custom Queries** from the Documents Group



2. The **Custom Queries Panel** will display all the custom queries available to you. The **Find** field allows you to narrow the list of custom queries displayed or find a specific custom query



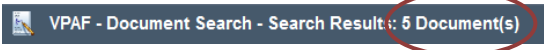
## USING A CUSTOM QUERY

3. Once you select a Custom Query a **Custom Query Form** is displayed. Enter the information required to retrieve the document(s) you are searching for and select **Search**

4. You can insert additional values by **double clicking on the white space** above the keyword label or using F6

You can also use **wildcards** as substitute for unknown characters (\*) or for a single unknown character (?)

Search results will appear in the **Search Results Pane** with the number of documents retrieved



Results of your custom query will be available for the duration of your OnBase session.

For details on how to use Complex Searches in Custom Queries and Retrieval see the [Complex Search Quick Reference Guide](#)

## SORTING, FILTERING AND GROUPING

Search results for a Custom Query will appear in the Search Results Pane. Search results can be sorted, grouped and filtered for easy retrieval.

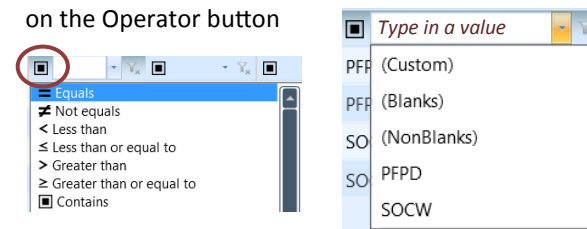
### To Sort a Column

All column lists can be sorted in ascending or descending order by clicking on the column heading.

### To Filter a Column

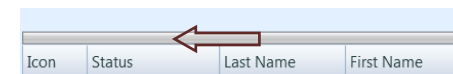
Select an **Operator** for your filter. Operators are available by clicking on the Operator button

You can select a value from the drop-down list or type in a value

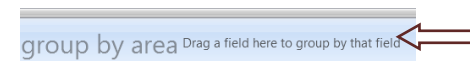


### To Group a Column

1. Click on the gray bar above the column heading



2. The **group by area** is displayed



3. Select a column heading and **drag and drop it into the grouping area**. To group further, continue to add column headings

