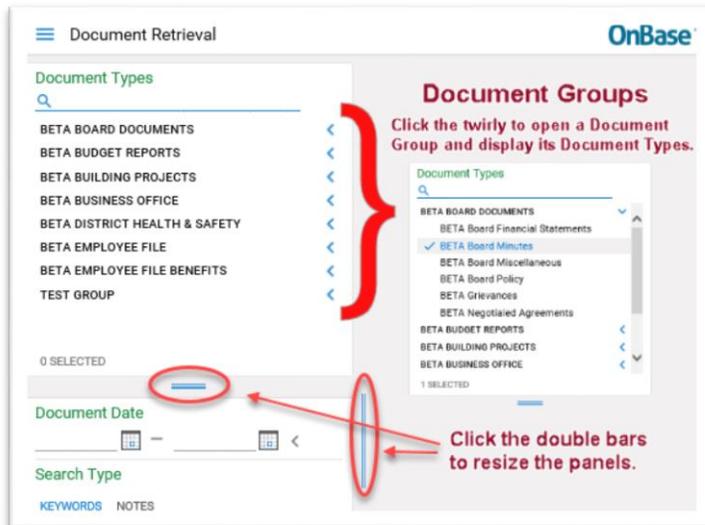# Basic Document Retrieval in the OnBase Web Client

When you log into the OnBase Web Client, the Document Retreival Panel will open by default. If it doesn't, you can click the menu icon (☰) to open it.

The Document Retrieval panel will display the Document Groups and Document Types you have the rights to view. The Document Groups will have a blue symbol at the right. If the symbol points to the left (‹), the group is 'closed'. To open it and view the Document Types inside, click the symbol.

You can resize the different panes of the viewer by clicking and dragging the blue double bars.

It is easy to find the document types you need, even if you do not know what group they are in. Simply place your cursor next to the magnifying glass under the words "Document Types" and start typing any part of the name of of the Document Type.
In this example typing in MI brings up all the Document Types that contain MI.
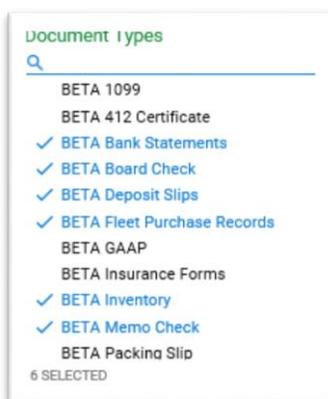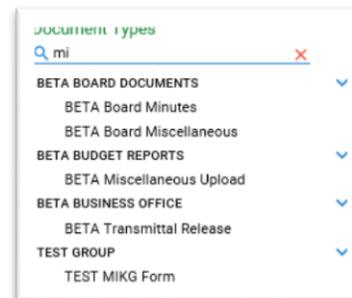
You can select multiple document types to search at once by holding the Control Key while clicking the different document types you would like to search.
Once you have selected the document type/s the Keyword Panel will display the keywords used for indexing. For searches across multiple documents, only their in-common keywords will display.
You can refine your search for specific documents by:
- The date or date range that they were **added to OnBase;**
- Specific keywords that were used to index the documents;
- A text search for words that might be on the documents;
- Notes that might have been added to the documents.

DATE RANGE SEARCH

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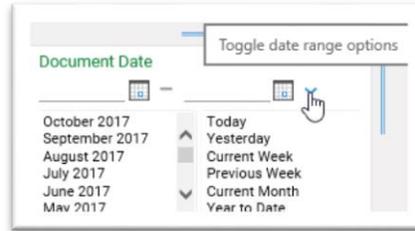
KEYWORD SEARCH

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 keyword. The date range search looks for the day the document entered OnBase. The Date field is the date that was on the document itself. For instance, a check dated 10/1/2017 might be put into sometime during the first week of October. The keyword is 10/1/2017, the date range 10/1/2017 - 10/7/2017.
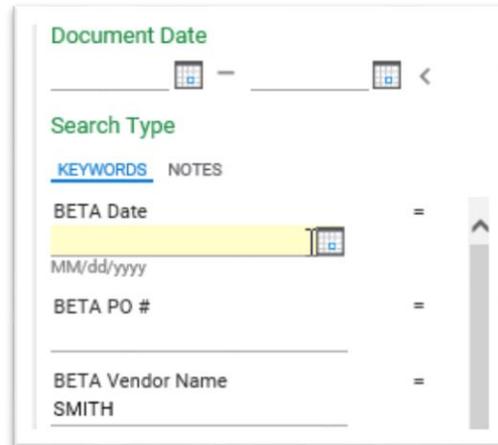
You can also use a wildcard (*). This is very helpful if you are unsure of the spelling.


Additionally, you can broaden your keyword search by opening a second instance of a field. In the example to the right, in order to find documents related to two vendors, you would double click the **label** of the Vendor Name keyword field (highlighted in pink on 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.
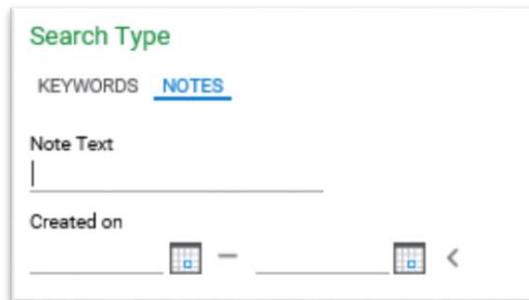
FULL-TEXT SEARCH

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.
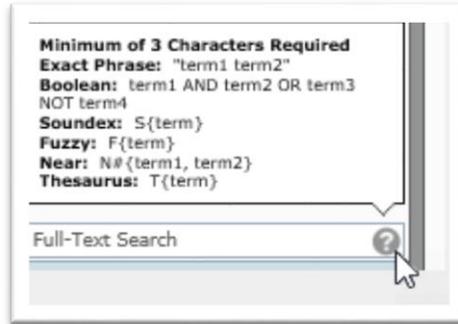
NOTE SEARCH

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

Once you have entered your search parameters, click SEARCH 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!