1. **Default Date**
   Configuring settings at the Default Date dialog box causes those settings to automatically appear in the date fields of the dialog boxes in the client program.

   For example, a user frequently retrieves documents from the current month. Configure the default date range to be Current Month on the Default Date dialog box. The date fields of the Document Retrieval dialog box will always appear with the first and last day of the current month. This limits the retrieved documents to be those with only the document dates from the current month.

   **How To:** User menu | User Options | Default Date tab

2. **Thumbnails**
   Thumbnails are a miniature version of each page in an image document. You can see all the pages of the document at one time through use of thumbnails.

   **How To:** User menu | User Options | Document tab | Image Thumbnails box

3. **Keyword Select Lists and Keyword Operators**
   Keyword Select Lists display keyword type fields as a drop-down list containing the values of all currently entered keyword values. Keyword Operators add a drop-down list of advanced keyword value operators such as =, >, <, etc. to the left of a keyword type field. It also adds a button to the right of the keyword field where you can choose from the AND and OR logical operators.

   **How To:** User menu | User Options | Startup tab

4. **Auto Display Keywords**
   Auto Display Keywords define the location for the display of keyword information at any of the four quadrants of the open document. **NOTE:** To view the keyword values in an auto display location, the Keyword Type Settings must be configured for auto display. A system administrator can configure this in the Configuration module.

   **How To:** 1) OnBase Configuration | Keyword | Keyword Types | Settings | Display Options box | Check Auto Display; 2) OnBase Configuration | Document menu | Document Type | Settings button | Auto Display Keyword Location box

5. **Display Text Search Toolbar and Annotation Toolbar**
   These toolbars give users to access text search and annotation functions from toolbars as opposed to right-click options.
6. **Verify Exit**
Verify Exit prompts users for confirmation upon exit of the Client program.

**How To:** User menu | User Options | Startup tab | Exit box

7. **Creating Envelopes**
An Envelope is like an inbox or filing tray. You can place whatever documents you want into the envelope, regardless of whether they have anything in common. When an envelope is opened, it displays a list of documents that have been placed in it.

Envelopes provide you with a personal "filing system" to group documents together for easy access. Only the person who creates an envelope can view that envelope. Since the envelope is simply an alternate way to retrieve documents, the documents remain accessible through the standard retrieval methods such as the Document Retrieval dialog box and custom queries.

**How To Create:** User menu | Envelopes | New Envelope | Enter name of Envelope | Create button | Drop documents into Envelope via a right-click | Close Envelope

**How To Access:** User menu | Envelopes | Open Envelope | Select name of Envelope

**How To Delete:** User menu | Envelopes | Open Envelope | Right-click on Envelope | Delete Selected

8. **Internal vs. External Text Searching**
Internal Text Searching allows users to search for text in an open document. When you use an internal text search, instances of the text string, called "hits", are displayed and highlighted as you move from one hit to the next. External text searching searches for text in closed documents. External text searches are initiated from the Document Retrieval dialog box.

**How To Internal:** Open Text Document | Right-click on Document | Text Search | Enter search parameters | Find, OR Open Text Document | Click Text Search button on Text Search Toolbar | Enter search parameters | Find

**How To External:** Select Document Type(s) | Click Text Search button on the Document Retrieval Dialog box | Enter search parameters | Find

9. **Using Wild Cards for Searching Alphanumeric Keywords**
Advanced Keyword Features allow you to narrow your document search from the Document Retrieval dialog box. Advanced Keyword Features include comparative operators, logical operators, and wild cards. To enable the advanced keyword features on startup, select the Keyword Operators check box on the Startup tab of the User Options dialog box.

Wild card characters are entered directly into the keyword type field to search for strings containing one or more unspecified characters.
The asterisk (*) wild card searches for text strings in which * represents one or more unspecified characters. For example, a search for LA* could result in the return of documents containing keyword values of Lane, Lake, and Lands.

The question mark (?) wild card searches for text strings in which ? represents a single, unspecified character. For example, a search for LAN? could result in the return of documents containing keyword values of Land, but not documents containing the keyword value of Lands.

10. **Create a New Document by Right-Clicking on Thumbnail**

   **How To Create New Document From Existing:** Open Document | Right-click on document | Thumbnails | Place cursor between two thumbnails | Right-click and drag to the OnBase desktop | Select Document Type | Select pages to move to new document | Choose whether to delete or keep pages in existing document | OK

11. **Import a Document by Drag-and-Drop to OnBase Desktop**

   The Client program deals primarily with documents that have already been brought into the system. The Client program also allows you to import documents one at a time using the Import Drag and Drop option. The Client program is not designed to import large quantities of documents during a single import.

   **How To:** Shrink/minimize your Client window | Locate file on your Workstation Desktop | Click file | Drag to OnBase desktop | Index with Import dialog

12. **F6 to Duplicate Keyword Field for Searching**

   When the Document Type is highlighted within the Document Retrieval dialog box, one instance of each keyword field can be viewed. Many times users have the desire to search for or search across multiple values of the same keyword filed. For example, you might want to search all legal documents for documents that contain Judge keyword values of Andrews or Rodriguez. You may also want to search for a range of Invoice Numbers from 2000 to 2030. Keyword fields can be duplicated numerous times.

   **How To:** Place your cursor in the desire keyword field | Press F6 | Enter value(s) | Find

13. **Reindexing a Document**

   Each document stored in the system has an associated document type, document date, and optional keywords. This information is usually entered when a document is first brought into the system. You can change keyword this information by re-indexing the document. **NOTE:** You can change keyword values by right-clicking the document, choosing Keywords, and entering new keyword values in the appropriate fields. Re-Indexing allows you to change the document type in addition to keyword values.

   **How To:** Select Document from Document Search Results | File menu | Re-Index option | Enter values into the Index Document dialog box | Index
NOTE: Be certain you want to change these values before saving. Once re-indexed, the
document can only be retried using the new keyword values.

14. Changing Keyword Order in Document Retrieval Dialog Box
The Keyword Types section in the Configuration module allows you to choose which keyword
types you want associated with the document type and arrange the order you want the keyword
types to appear in dialog boxes that list all the keyword types for the document type. A system
administrator can make these changes. NOTE: If the keyword order is changed, the order will be
changed for all users who have access to that document type.

How To: Configuration module | Document menu | Document Types option | Select Document
Type | Keyword Types button | Highlight selected Keyword Type | Move Up or Move Down

15. Stapling Documents Together
Staples allow you to logically attach documents to each other. For example, you can staple a
single customer’s records together, or you can staple an invoice and its related purchase order
together.

How To Staple: Open document(s) you want to staple to other documents | Open the
document(s) you want to staple to the first document(s) | Right-click on the second document(s)
and drag the document(s) onto the first document(s) | Front and back staples will be created on
the document(s)

How To View Staples: Double-click on the staple icon | Double-click in the text of the staple
icon message | Double-click on any stapled document in the list to view

How to Delete Staples: Open document with staple | Right-click on staple icon | Delete Note

16. Sortable Custom Queries
The results of Custom Queries can be sorted by keywords and system metadata. The hit list can
be sorted on any combination of keywords and available system metadata. Display only the data
necessary without respect to the sort order. All keyword text can be displayed. The order of each
keyword can be set. Each User Group can have their own view of the same information. A
system administrator can define these settings.

How To Configure: Configuration module | Queries menu | Custom Queries option | Select
desire custom query | Display Column button | Choose and Add how the columns will be sorted |
Save & Close button | Sort Column button | Choose how columns will be displayed in the results
list

How To Use: File menu | Open | Custom Query | Select desired Custom Query | Enter search
parameters | Find | Sort by clicking on the column headers in the Document Search Results

17. Close Current Window Shortcut
How To: Open a Document | Ctrl-F4 to close current window
18. **Keyword Type Call Operators Shortcut**

   **How To:** Place cursor in keyword field | F3 shows dropdown of keyword call operators (\(=\), \(<\), \(>\), etc.)

19. **Keyword Operator Change Condition (AND/OR) Shortcut**

   **How To:** Place cursor in keyword field | F6 to duplicate field | Place cursor back in first keyword field of that name | F4 to change the AND/OR condition

20. **Overlay Shortcuts**

   **How To:** Open a document that utilizes the overlay feature | Ctrl-O displays overlay; Ctrl-T displays text

21. **Display Right-Click Menu Shortcut**

   **How To:** Open a document | Alt-S displays right-click menu options

22. **Apply Note Shortcut**

   **How To:** Open a document | Ctrl-N applies a note

23. **View Next Document in Document Search Results Shortcut**

   **How To:** Ctrl-F7 views the next document in document search results

24. **View Keywords of Highlighted Document in Document Search Results Shortcut**

   **How To:** Highlight document in document search results | Ctrl-K to view keywords