

ONBASE

WORKVIEW FULL-TEXT AND ADVANCED SEARCH

SUMMARY

The WorkView Full-Text and Advanced Search (Context Search Framework) provides a simple interface that makes it easy to full-text search across the data stored in one or more of your WorkView | Case Manager business applications. Administrators can define search scopes that can include one or more record types (classes) and assign them to specific OnBase user groups. End users can then perform simple to advanced searches on data values to quickly and easily locate relevant data records (objects).

BENEFITS

- **Extends search capabilities to include large text fields** including text or formatted text attributes.
- **Provides efficient searching** of data stored in multiple record types (classes) and business applications.
- **Enables targeted searching** with advanced search options to narrow results to a manageable set.

APPLICATIONS

- **Legal (eDiscovery):** Subpoenas require the timely and accurate production of case-related data to avoid fines and court sanctions. Organizations can quickly search their entire set of potential evidence, exhaustively locating every relevant piece of data. Litigation handling costs are reduced by eliminating manual paralegal labor to locate, collect, and produce evidence.
- **Human Resources:** Employee-related cases, such as harassment, conflicts and complaints, medical leaves, and misconduct are all efficiently managed by HR professionals using WorkView | Case Manager. When an HR manager needs to investigate a specific employee's history, using the WorkView Full-Text and Advanced Search they can perform a single full-text search that yields a complete set of results—supporting better and faster decision making.

KEY FEATURES

- **Search Catalogs** allow administrators to create and assign search scopes to user groups that can include multiple data fields—including text and formatted text—across multiple record types and even across multiple applications.
- **Powerful advanced search functions** quickly and accurately locate specific data records including any/all, Boolean, date ranges, stemming (grammatical variations), synonym (thesaurus), fuzzy (misspellings).
- **Available in multiple interfaces** including Unity Client and the WorkView Integration for Microsoft Outlook.

INTERFACE

The screenshot shows a search interface titled "High Speed". It features several sections for configuring a search:

- Catalogs:** A dropdown menu currently set to "Vendor".
- Specific classes to search:** A list of classes including "Vendor", "Product", "Audit", "Discount", "INCIDENT", and "Vendor Evaluation". "Vendor" is selected. Below the list are "Select All" and "Clear All" buttons.
- Search Type:** Radio buttons for "All", "Any", and "Boolean". "All" is selected.
- Date Options:** Checkboxes for "Include Dates", "Created from/through", and "Modified from/through".
- Search Modes:** Checkboxes for "Use stemming for all words (~)", "Search using synonyms (&)", and "Fuzzy searching (misspellings)(%)". A slider below these options ranges from 0 to 7, currently set at 0.

Advanced options allow users to perform very specific, targeted searches.

The screenshot shows the "Vendor Management" application interface. The search results are displayed in a table with the following columns: Title, Class, and Score. The results are as follows:

Title	Class	Score
Vendor #: 70 - HIGH SPEED	Vendor	100
SPECIAL TERM - Vendor: HIGH SPEED - 30% surcharge for weekend service calls	Social Term	40
SPECIALTERM - Vendor: HIGH SPEED - 15% surcharge for service after 5pm	Social Term	40
SPECIAL TERM - Vendor: HIGH SPEED - 10% discount on wiring jobs over 300 hours.	Social Term	40
VENDOREVALUATION - Vendor: HIGH SPEED - 4	Vendor Evaluation	40
VENDOREVALUATION - Vendor: HIGH SPEED - 2	Vendor Evaluation	40
VENDOREVALUATION - Vendor: HIGH SPEED - 2	Vendor Evaluation	40
VENDOREVALUATION - Vendor: HIGH SPEED - 5	Vendor Evaluation	40
Incident #: 96 - HIGH SPEED	INCIDENT	40
Incident #: 89 - HIGH SPEED	INCIDENT	40
Incident #: 70 - HIGH SPEED	INCIDENT	40
Incident #: 69 - HIGH SPEED	INCIDENT	40
Incident #: 44 - HIGH SPEED	INCIDENT	40

At the bottom right of the interface, it says "Currently viewing 13 of 13 records" and "Notifications (0)".

A simple full-text search yields results from multiple applications.

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