

# Fifth Judicial District Surrogate's Court



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## Members Login

Once members register through the web registration they will receive their own User name and password. Members **must** use the <http://surrogate5th.courts.state.ny.us/onbase> web address to gain access to the members only website. Make sure you update your favorites with this new web address. **The first time you login you will be asked to download the "Hyland software". You must say "yes" in order to view images.**

The members and public login screens looks similar, but there are distinct differences. The sample screens below will help you to know what to look for when logging in to the members only website..

Members Login	Non-Members Login
<p>User Name <input type="text"/></p> <p>Password <input type="password"/></p> <p><input type="button" value="Login"/></p> <p><input type="radio"/> html only</p> <p><input checked="" type="radio"/> activeX</p> <p>Compatible with: Internet Explorer 5.5/6.0 with MSXML 2.5 SP1 or 3.0 SP2.</p> <p>Copyright © 2003.</p>	<p>User Name PUBLIC</p> <p>Password *****</p> <p><input type="button" value="Login"/></p> <p>Click here to request an account</p> <p><input type="button" value="Web Registration"/></p> <p>Compatible with: OnBase Database Versions 3.5-135. Internet Explorer 5.5/6.0 with MSXML 2.5 SP1. Netscape 6 and above</p> <p>Copyright © 2003.</p>

Once you have determined that you are at the *members only* login screen, type your user name and password that you received via email, click on **HTML**, then click on the login button.

### Logging Off

When you have completed your searching, please log off from the system. To log off of an open session:

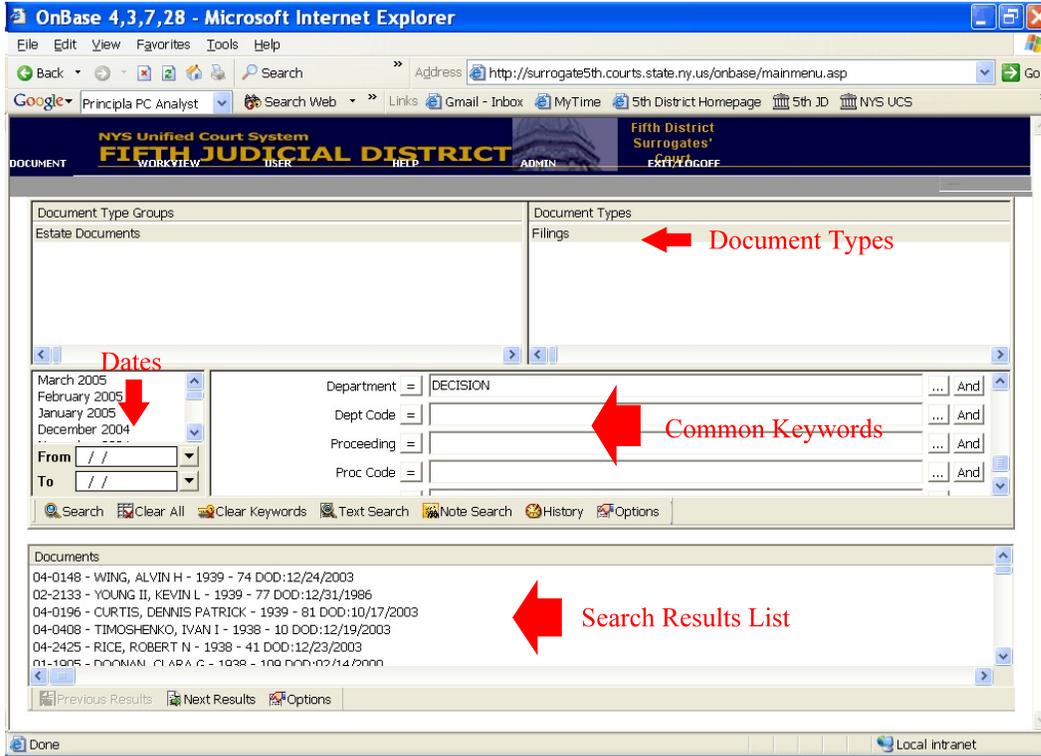
1. Select Exit/Logoff at the top of the screen.
2. Click Yes to log off. Click No to stay connected to the open session.





## Basic Search

The Document Retrieval dialog box allows you to retrieve documents.



To open a text or image document, Click “Filings” under Document Types.

### Common Keywords

Once you have selected “Filings” under document types, common keyword type fields appear. You can limit your search based by one or more of the following Common Keywords.

- |                          |               |
|--------------------------|---------------|
| Roll                     | Attorney      |
| Batch                    | Date Filed    |
| Last Name                | Date of Birth |
| First Name Record Number | Comment       |
| Domicile Street Address  | Department    |
| Domicile City State Zip  | Dept Code     |
| Date of Death            | Proceeding    |
| Place of Death           | Proc Code     |
| Judge                    | Letter Type   |





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### Search Tips:

Keep the fields to a minimum. Not each field needs to have a keyword inserted and the fewer fields selected the more successful the search.

To limit the search, enter specific keywords in the field for which to search.

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### Keyword Searching

The most efficient search method to use is the **Record Number field** *only* if known. When entering the **Record Number**, use an \* (Asterik) at the end to pick up any extensions to the file. For example 2009-601\*. If the **Record Number** is unknown then search by **Last Name and County**. Again, when searching by **Last Name** and/or **First Name** be sure to use an \* (Asterik) at the end of each for any Jrs, Srs, middle names, initials, etc. The \* Asterik acts as a wild card .

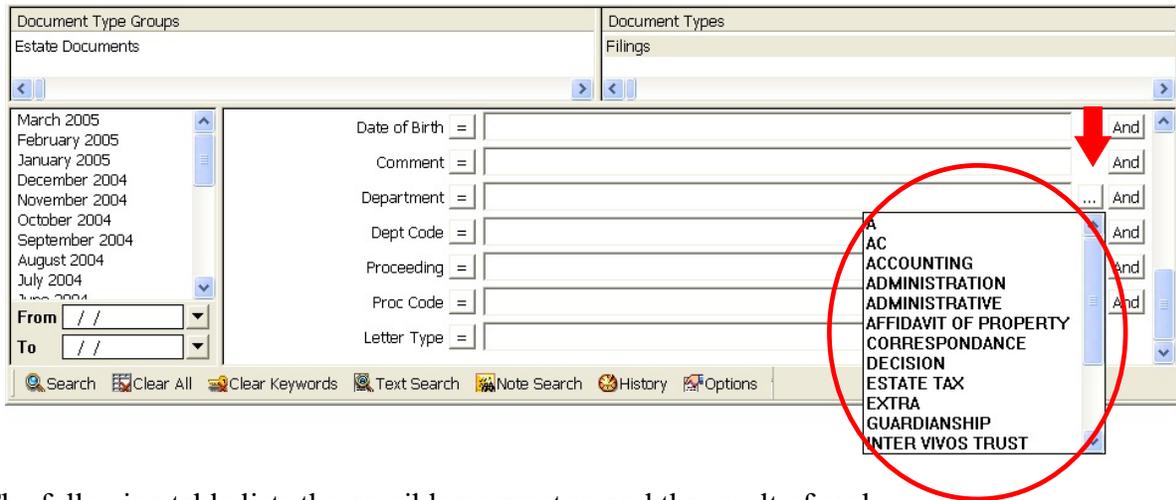
### Limiting the Search

For a more restricted search use the **Department field**. Each proceeding that is brought into the system is assigned to a **Department**. **Departments** group together similar types of proceedings. For example, the **Department PROBATE** will find only Probate Proceedings and the **Department DECISION** will display all of Judge Wells' decisions. You can limit your document searches to only those documents of a certain Department type.

### Limiting the Search Further

A search can further be narrowed by **Proceedings**. A **Proceeding** is a subcategory of a Department type. For example **Department DECISION and Proceeding COMPROMISE CAUSE OF ACTION** will display Wrongful Death Decisions. Department and Proceeding Types can be found in a drop-down boxes at the end of the field.





The following table lists the possible parameters and the result of each.

Parameters	Result
Department = DECISION	Returns all Decisions.
Department = DECISION From Date = 10/01/2004 End Date = 10/31/2004	Returns Decisions between 10/01/2004 and 10/31/2004
Last Name = SMITH First Name = JOHN	Returns document relating to "John Smith"
Date of Death = 03/01/1995	Returns documents with a Date of Date of "03/01/1995"

### Performing the Search

Click Search to perform the search with the date and keyword selection



### Document Search Results List

The **document search results** list contains a list of all documents that meet the criteria from your search. This window is located at the bottom of the display. A Documents toolbar is also present, and provides for the adjustment of certain display options, and next/previous viewing selection of the list.





Documents

- 04-1658 - ALGEO, SUZANNE F - 1926 - 3 DOD:06/12/2004
- 99-0754 - CRISELLA, SAVERIO J. - 1926 - 39 DOD:06/07/1995
- 04-1648 - KENNEDY, JOHN J - 1926 - 71 DOD:
- 04-1650 - MARTIN SR, WILLIAM F - 1926 - 82 DOD:12/22/2003
- 04-1599 - COOK, VINCENT A - 1927 - 68 DOD:06/28/2004
- 04-0390 - CROSS, JEFFREY L - 1927 - 80 DOD:11/29/2003

Search Results List

Previous Results Next Results Options

The image shows a screenshot of a web application interface. It features a list of document entries under the heading 'Documents'. Each entry includes a case number, a name, a year, and a date. A red arrow points from the text 'Search Results List' to the list of documents. At the bottom of the interface, there are navigation buttons for 'Previous Results', 'Next Results', and 'Options'.





### Quick Search - Decisions

1. Enter appropriate COUNTY
2. Scroll to the DEPARTMENT FIELD
3. Use drop down list and select DECISION

The screenshot shows a search interface with two panes: 'Document Type Groups' (Estate Documents) and 'Document Types' (Filings). A central search form contains fields for Attorney, County (ONONDAGA), Date Filed, Date of Birth, Comment, Department, and Dept Code. A dropdown menu is open for the Department field, listing options: A, AC, ACCOUNTING, ADMINISTRATION, ADMINISTRATIVE, AFFIDAVIT OF PROPERTY, CORRESPONDANCE, DECISION, ESTATE TAX, EXTRA, GUARDIANSHIP, and INTER VIVOS TRUST. A red arrow points to 'DECISION'. The bottom toolbar includes Search, Clear All, Clear Keywords, Text Search, Note Search, History, and Options.

*To Further Narrow the Search:*

4. Scroll down to the PROCEEDING FIELD
5. Use the drop-down list to select the appropriate choice, for example: COMPROMISE CAUSE OF ACTION will return Wrongful Death Decisions
6. Then click on the SEARCH icon.

This screenshot shows the search form with 'ONONDAGA' in the County field, 'DECISION' in the Department field, and 'COMPROMISE CAUSE OF ACTION' in the Proceeding field. Red arrows point to each of these three fields. The 'From' and 'To' date fields are empty. The 'Search' button in the bottom toolbar is highlighted with a red box.





### Quick Search - Name

1. Type last name in LAST NAME field and insert an asterisk (\*)
2. Type first name in FIRST NAME field and insert an asterisk (\*)
3. Then click on the SEARCH icon.

The asterisk (\*) will allow you to retrieve a name which includes a middle initial.

Document Type Groups: Estate Documents

Document Types: Filings

March 2005  
February 2005  
January 2005  
December 2004  
November 2004  
October 2004  
September 2004  
August 2004  
July 2004  
From: //  
To: //

Roll =  
Batch =  
Last Name = SMITH\*  
First Name = JOHN\*  
Record Number =  
Domicile Street Address =  
Domicile City State Zip =

Search Clear All Clear Keywords Text Search Note Search History Options

Documents

99-1367 - SMITH, JOHN T. - 1708 - 0204 DOD:07/08/1999  
99-1367 - SMITH, JOHN T. - 1678 - 0036 DOD:07/08/1999  
00-1474 - SMITH, JOHN B. - 1740 - 0155 DOD:07/12/2000  
00-1474 - SMITH, JOHN B. - 1725 - 0047 DOD:07/12/2000  
00-1474 - SMITH, JOHN B. - 1729 - 0023 DOD:07/12/2000

Previous Results Next Results Options





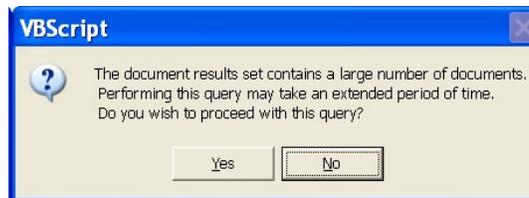
### Document Search Results List

The document search results list contains a list of all documents that meet the criteria from your search. This window is located at the bottom of the display. A Documents toolbar is also present, and provides for the adjustment of certain display options, and next/previous viewing selection of the list.



### Search Warning Message

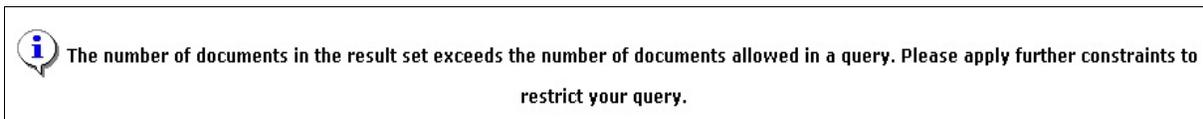
Depending on the search criteria, you may be prompted with the following message:



You must click Yes to continue the query and No to cancel the query.

### Search Error Message

Also, if the query exceeds the configured document results limit, the following message will display:



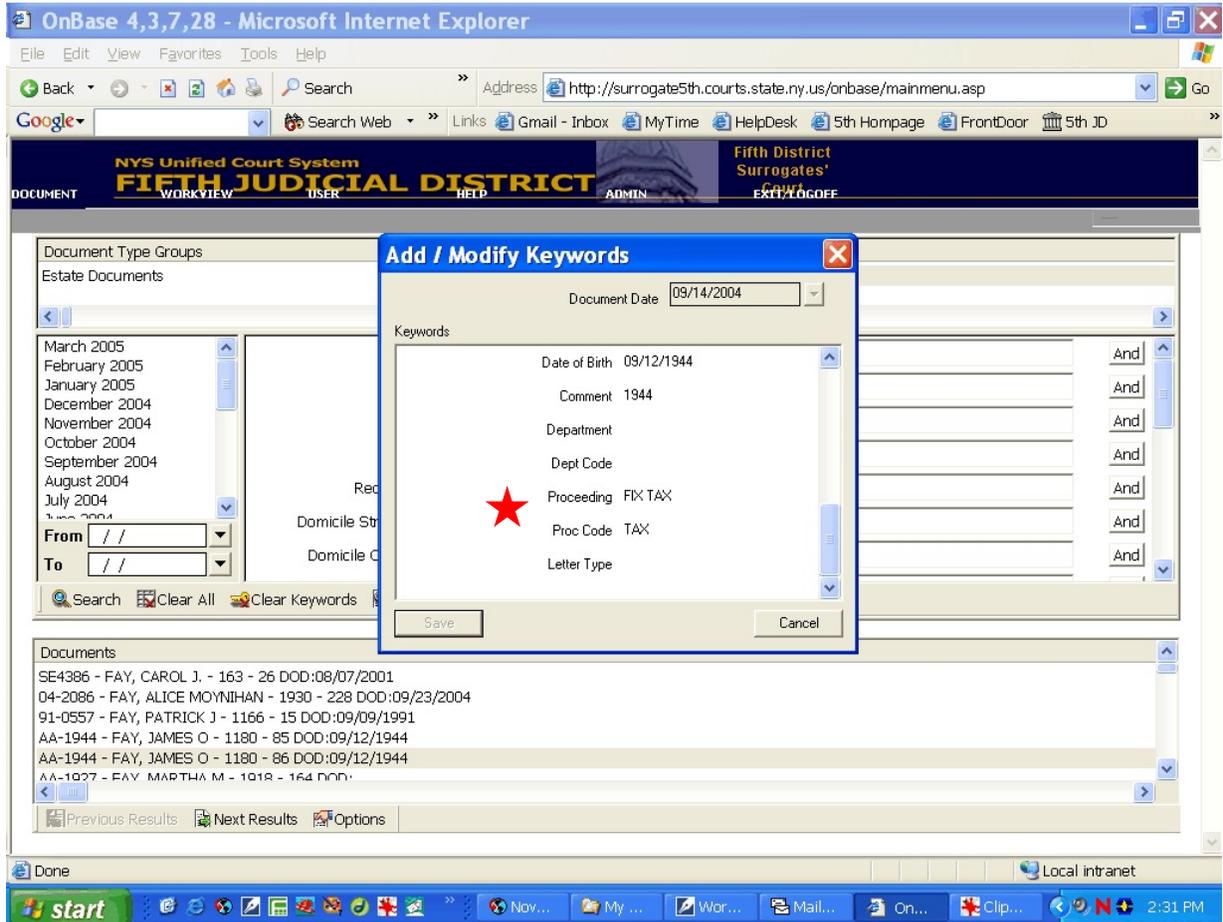
If this message displays, no results will be displayed unless search constraints are entered that reduce the number of documents found.





### Choosing the Right Document

When multiple results are found, right click on each line to display the keywords associated with that line. This will allow you to open only the proceeding you need.



### Viewing Documents

Double-click the name of the document in the search results list to view that document. The image document is loaded into the ActiveX Viewer window. Image documents are graphic representations of information, such as images of Wills, petitions, and decrees.

### Clear Keywords & Clear All

The *Clear Keywords* button removes text currently entered in the keyword type fields.

The *Clear All* button clears all selected search criteria (To/From Dates, Keyword Type fields, Document Type Group and Document Type selections). You must click on "Filings" under the Document Types to begin again.





**Recent Query History**

The History button displays the Query History dialog box shown below. This dialog displays the queries that have been performed during the current session. To repeat a previous search, select the query and click Search.





## Advanced Search

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. A system administrator can enable the advanced keyword features on startup.

### Comparative Operators (Reverse Search)

Comparative operators allow you to retrieve documents based on a range of keyword values, as well as exact keyword value matches. Select the Document Type Group and Document Type you wish to search. Click on the comparative operators button to toggle between operators.

Available operators are:

<i>Operator</i>	<i>Description</i>
=	Searches for an exact keyword match.
<>	Searches for keyword values that are not equal to the specified value.
>	Searches for keyword values that are greater than the specified value.
>=	Searches for keyword values greater than or equal to the specified value.
<	Searches for keyword values that are less than the specified value.
<=	Searches for keyword values that are less than or equal to the specified value.

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**Note:** Of the operators above, only = and <> are available for use with keywords of the alphanumeric data type. Other operators are available for numeric keywords such as Roll and Batch.

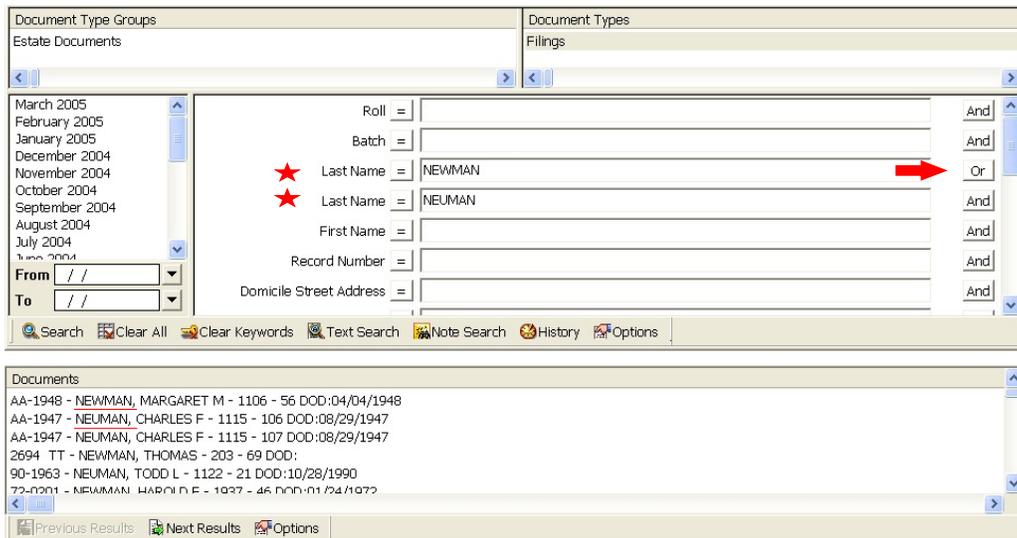
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**Logical Operators (Searching Multiple Names and Spellings)**

The logical operators And, Or, and To appear to the right of the keyword type edit field. In order to use logical operators you must have two edit fields for the keyword type you wish to search. To create an additional edit field for the keyword, double-click on the keyword type to the left of the comparative operator.



To change the logical operator in use, push the logical operator button, which scrolls through the available options:

<i>Operator</i>	<i>Description</i>
And	Searches for documents containing the keyword values preceding and following the logical operator.
Or	Searches for documents containing either the value preceding the logical operator or the value following the logical operator.
To	This operator is available only when used between two numeric values. This operator searches for all values that are between the two values. In other words it searches for all documents containing keyword values that are greater than or equal to the first value and less than or equal to second value.

**Wild Card Operators**

Enter wild card character asterisk (\*) directly into the keyword type field to search for text strings containing one or more unspecified characters. 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 asterisk must appear at the end of the search string, not in the begin or middle (LA\* = correct, \*NE or L\*NE= incorrect)





### **Changing your Password**

If your system administrator has configured your system to allow it, you can change your user password (e.g., the currently logged on user) at any time. When you change your password, the new password is saved throughout the entire system.

To change your password:

4. Select the User menu and click Password (at the top of the screen).
5. Type your current password in the Old Password field. All keystrokes appear as asterisks (\*) to maintain security.
6. Type the new password in the New Password field. Re-enter the password in the Verify New Password field.
7. Click Change Password to save the new password, or click Cancel to abort the changes.

Change Password -- Web Page Dialog

Username: AMITCHEL

Old Password:

Password:

Confirm Password:

Change Password Cancel

http://surrogate5th.courts.state.ny.us/OnBase/C Local intranet

