How to Search Donor Files in OnBase

The HSD Donor Search is used for exactly that – finding information about donors, prospects, estates, corporations, foundations, trusts, organizations, associations, and centers.

- Donor files are organized in OnBase using both Advance ID(s) and Donor(s) names
- Searching by an Advance ID will narrow your results
- 1. Once in OnBase, click on the Custom Queries button in the ribbon at the top of the screen (see below).

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File Home	Last Logies 1/29/2024 103952
Home Personal Favorites Favorites	Q O Cuery History In Tach Can Image: Create Image: Create Image: Create Reporting Workflow Box Construction Create Reporting Workflow Create Reporting Workflow
Websites 🙆 🔬	RSS Ticker
UVAMC	What is Paas? Platform-as-a-Service 101 The Hyland Blog 1/25/2023 12:52:45 PM
	http://www.hailthsystem.virginia.edu
	Request an AppointmentPay a BillClinical TrialsCareersMyChart UVA Health Children's >
	WVAHealth Find a Provider Services Locations Patients & Visitors Q

2. Click on the HSD Donor Search query (see below).

	<u> </u>		OnBase (Production)					
	File Home Home Personal Favorites Favorites Favorites	Query History Trash Can My Checkouts Document Handle Documents	ms Import Templates Create Reporting	ng Workflow Notkflow Notkflow Workflow Workflow Workflow Maging				
	Custom Queries	🔁 Custom Query						
5	Query HSD Document Search HSD Donor Search HSD Fund Search	×						

- 3. Let's search for Barry Battle using her Advance ID to narrow the results.
 - In the Donor Information box type:
 - i. Asterick, Advance ID, Asterick (example: *4748*)
 - ASTERICKS should always be used in front and behind your search criteria

9														OnB	ase (Production)		
File	Home	2															
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Q, 1	ISD Fund S	Search				*4748*										 	
						Additio	nal Info										

4. Search Results:

File Home Document				On	Base (Production)	
Home Personal Favorites Favorites) Query History My Checkouts Document Hand Documents	Trash Can Forms Impo	rt Templates Reporting Wo	rkflow Batch Scanning Processing		
Custom Queries	🔍 HSD	Donor Search - Search Resu	Ilts: 136 Document(s)			
Query Filter	HSD Dr	onor Search 🤝 🗙				
Bonor Borbine						
BIOGRAPHICAL 1	lcon	Donor Information	Donor Doctype	Legacy User Description	Additional Info	
GIFT INFORMATION 9		• • T _X	• • T _X	• • T _X	= • T _X	
LEGAL 1 MISC. 18		3024748,3024718 DAILEY JR., THEODORE E., JOAN G.	CORRESPONDENCE/ CONTACTS	20091223-TY FR. K. RENDLEMAN TO JOAN	GIFT TO SUPPORT MELANOMA RESEARCH OF DR. SLINGLUFF AT HITC	
4748 BARRY W. BATTLE, WILLIAM C. 4748 BATTLE, BARRY W. 4748 MRS. BARRY W. BATTLE 4749 DOTE PATTLE PADDY M. WILLIAM C. (DECENCE)	^	3024748,3024718 DAILEY JR., THEODORE E., JOAN G.	CORRESPONDENCE/ CONTACTS	20091223-TY FR. K. RENDLEMAN TO THEODORE	GIFT TO SUPPORT HUMAN IMMUNE THERAPY CENTER- CLINICAL TRIALS	
< >> >>	~	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20170111 TY FR RENDLEMAN		
Legacy User Description		4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20170418 TY FR RENDLEMAN		
08/28-TY FR. J. CASTEEN TO. BARRY & BILL 1 12/07-TY FR. J. CASTEEN 1	<u></u>	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180118 TY FR RENDLEMAN		
1997/0203-11 PK, R. CAREY IO, M/M 1997/0213-NOTE FR. M. STAYTON RE. CORP/FD 19971014-MEMO FR. P.KELLEHER RE. PULSE S 1997230 SECURITIES TRANSACTION	~	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180614 TY FR RENDLEMAN		
		4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180220 TY FR NATARO AND SKEEN		
(blank) CANCER CENTER AWARDED COMPREHENSIVE CENTE	^	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180601 TY FR NATARO AND SKEEN		
CORRESPONDENCE, SCULPTURE INVOICES, LIST, ART GIFT TO F. BERRY MD PROFESSORSHIP-PEDIATRIC AN	~	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180817 COMPASS ROSE NOTE FR HUNTER		
< >		4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180828 TY FR RENDLEMAN		
Reset		4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20210909 INFO/TY FROM THOMAS LOUGHRAN	CANCER CENTER AWARDED COMPREHENSIVE CENTER DESIGNATION	

- 5. As you can see, the results include information for multiple donors who have 4748 in their Advance ID. To further narrow your results, you can filter using the information on the left or from the drop down under the column headings.*
 - You can choose multiple contiguous results on the left by holding down the Shift Key while clicking on them or choose noncontiguous criteria while holding down the Ctrl Key
 - Hit Reset to clear the filters and start again
 - *You can also filter your results by the drop down under the column headings, but you can only choose 1 result at a time
 - i. You can custom filter using the drop down under the column headings
 - ii. To clear filters under the column headings, click on the x next to the filter icon
 - 1. It's important that you clear your filters under column headings or it may continue to limit your results
 - iii. You can also sort by the column headings
 - The # of documents will change based on your filters (There's 136 for this example.)
- 6. For this example, I only want to see Barry and Bill Battle, so I'm going to select all their listings under the Donor Information filters on the left using my Shift key.

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File Home Document					Now there are 124
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Home Personal Favorites Custom Retrieval	Handle Forms Impo	rt Templates Reporting W	orkflow Batch Batch		documents that match
Favorites Documents	Cre	ate Reporting W	orkflow Imaging		documents that materi
Custom Queries 🔍	HSD Donor Search - Search Resu	ilts: 134 Document(s) match	ed of 136 found		mv search and filter.
Query Filter	HSD Donor Search 🤝 🗙				5
Donor Doctype					
BIOGRAPHICAL 1	Icon Donor Information	Donor Doctype 🔺	Legacy User Description	Additional Info	
GIFT INFORMATION 9	• T _X • T _X	• * T _X	• * T _X	= • T _X	
MISC. 18	4748,22078 BATTLE, BARRY W., WILLIAM C. (DECEASED)	BIOGRAPHICAL	20080601_WILLIAM BATTLE OBITUARY		
Donor Information 4748 BARRY W. BATTLE, WILLIAM C.	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20170111 TY FR RENDLEMAN		
4748 BATTLE, BARRY W. 4748 MRS. BARRY W. BATTLE 4748,22078 BATTLE, BARRY W., WILLIAM C. (DECEASEI	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20170418 TY FR RENDLEMAN		
<	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180118 TY FR RENDLEMAN		
Legacy User Description	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180614 TY FR RENDLEMAN		
08/28-11 F.K. J. CASTEEN TO. BARRY & BILL 1 ^ 12/07-17 F.R. J. CASTEEN 1 19970205-TY FR. R. CAREY TO. M/M 1	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180220 TY FR NATARO AND SKEEN		
19970213-NOTE FR. M. STAYTON RE. CORP/FD 1 19971014-MEMO FR. P.KELLEHER RE. PULSE S 1 19971230 SECURITIES TRANSACTION 1	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180601 TY FR NATARO AND SKEEN		
Additional Info	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180817 COMPASS ROSE NOTE FR HUNTER		
(blank) CANCER CENTER AWARDED COMPREHENSIVE CENTE	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20180828 TY FR RENDLEMAN		
GIFT TO F. BERRY MD PROFESSORSHIP-PEDIATRIC AN	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20210909 INFO/TY FROM THOMAS LOUGHRAN	CANCER CENTER AWARDED COMPREHENSIVE CENTER DESIGNATION	
Reset	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20101116 LETTER FROM MCGUIRE WOODS	REQUEST FOR GIFT TO THE CHILDREN'S HOSPITAL- BATTLE BLDG.	
	4748 BARRY W. BATTLE	CORRESPONDENCE/ CONTACTS	20230324 TY FROM AMY KARR	GIFT TO F. BERRY MD PROFESSORSHIP-PEDIATRIC ANESTHESIOLOGY	
	4748 BARRY W. BATTLE, MRS. WILLIAM C.	CORRESPONDENCE/ CONTACTS	20150429 THANK YOU FROM KBR		

7. For this example, I know that I just want to see any gift agreements that the Battles have signed, which should be filed under the Doctype of Legal.

E Home Document				On	Base (Production)	
Home Personal Favorites Favorites Favorites	ry History Checkouts ument Handl ments	Trash Can Forms Impor	t Templates Reporting Wo	brkflow Batch Scanning Imaging	Now there's only 1 document that	
Custom Queries	🔍 HSD	Donor Search - Search Resu	Its: 1 Document(s) matched	of 136 found	matches my search	
Query Filter	HSD Do	nor Search 🤝 🗙			and filter.	
Donor Doctype	_					
BIOGRAPHICAL 1 CORRESPONDENCE/CONTACTS 107	lcon	Donor Information	Donor Doctype 🔺	Legacy User Description	Additional Info	
GIFT INFORMATION 9		• • T _X	• • T _X	• • T _X	= • T _X	
MISC. 18		4748,22078 BATTLE, BARRY W., WILLIAM C. (DECEASED)	LEGAL	20100620-GIFT AGREEMENT		
Denor Information 3024748, 3024748, 3024718 DALEV RR, THEODORE E, JOAN G. 4748 BARRY W. BATTLE 4748 BARRY W. BATTLE WILLIAM C. 4748 BARRY W. 4748 BARRY						

- 8. To open or save a document, simply double-click on it.
 - If opened, you can save it, print it or send it as an attachment on an email
 - i. The attachment name will be odd, so I recommend saving it, renaming it, and then attaching it to an email
 - To get back to the search screen, X out of the document
- 9. To exit out of the search, click the red X beside HSD Donor Search at the top of the search screen and make sure that you Clear the Search criteria before starting another Search.
- 10. If you do a search by name, you should still use ASTERICKS at the front and end of the name.
 - You can narrow your results by including a Type specific to Donor Files. They are (1) Active Individuals (includes Estates & Prospects), (2) Corp. & Corp. Foundations, (3) Organizations, Associations and Centers, and (4) Private Foundations and Trusts
 - Or you can leave the Type field blank and filter on the results to narrow your search results
 - i. You will see results for misc. documents when searching by name and leaving the Type field blank