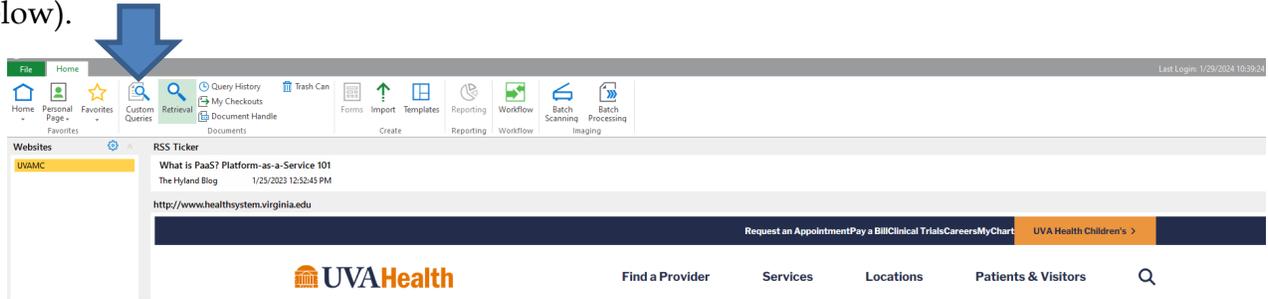


How to Search Donor Files in OnBase

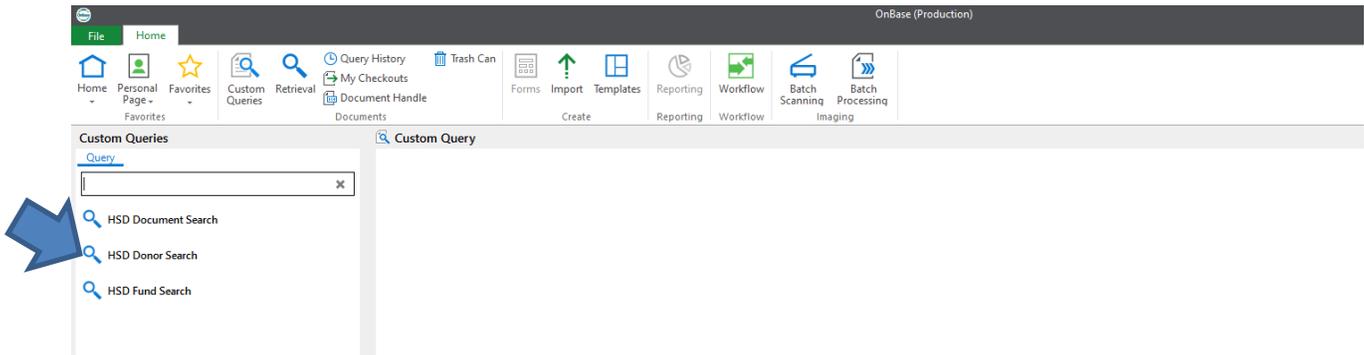
The HSD Donor Search is used for exactly that – finding information about donors, prospects, estates, corporations, foundations, trusts, organizations, associations, and centers.

- 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).

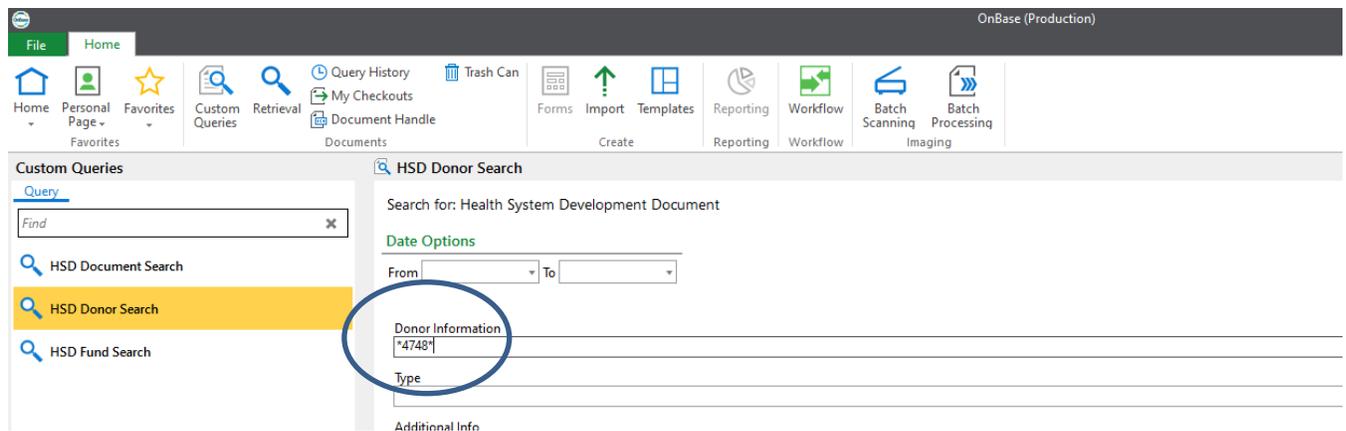


2. Click on the HSD Donor Search query (see below).



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**



4. Search Results:

Icon	Donor Information	Donor Doctype	Legacy User Description	Additional Info
	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
	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	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20170418 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180118 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180614 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180220 TY FR NATARO AND SKEEN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180601 TY FR NATARO AND SKEEN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180817 COMPASS ROSE NOTE FR HUNTER	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180828 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20210909 INFO/TY FROM THOMAS LOUGHHRAN	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.

Now there are 134 documents that match my search and filter.

Icon	Donor Information	Donor Doctype	Legacy User Description	Additional Info
	4748,22078 BATTLE, BARRY W., WILLIAM C. (DECEASED)	BIOGRAPHICAL	20080601, WILLIAM BATTLE OBITUARY	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20170111 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20170418 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180118 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180614 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180220 TY FR NATARO AND SKEEN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180601 TY FR NATARO AND SKEEN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180817 COMPASS ROSE NOTE FR HUNTER	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20180828 TY FR RENDLEMAN	
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20210909 INFO/TY FROM THOMAS LOUGHHRAN	CANCER CENTER AWARDED COMPREHENSIVE CENTER DESIGNATION
	4748 BARRY W. BATTLE	CORRESPONDENCE/CONTACTS	20210909 INFO/TY FROM THOMAS LOUGHHRAN	CANCER CENTER AWARDED COMPREHENSIVE CENTER DESIGNATION
	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.

OnBase (Production)

File Home Document

Home Personal Favorites Custom Queries Retrieval Query History My Checkouts Document Handle Trash Can Forms Import Templates Reporting Workflow Batch Scanning Batch Processing

Now there's only 1 document that matches my search and filter.

Custom Queries

Query Filter

HSD Donor Search - Search Results: 1 Document(s) matched of 136 found

Icon	Donor Information	Donor Doctype	Legacy User Description	Additional Info
<input checked="" type="checkbox"/>	4748,22078 BATTLE, BARRY W., WILLIAM C. (DECEASED)	LEGAL	20100620-GIFT AGREEMENT	

Donor Doctype

- BIOGRAPHICAL 1
- CORRESPONDENCE/CONTACTS 107
- GIFT INFORMATION 9
- LEGAL 1
- MISC. 18

Donor Information

- 3024748,3024718 DAILEY JR., THEODORE E., JOAN G.
- 4748 BARRY W., BATTLE
- 4748 BARRY W., BATTLE, MRS. WILLIAM C.
- 4748 BARRY W., BATTLE, WILLIAM C.

Legacy User Description

- 08/28-TY FR. J. CASTEEN TO. BARRY & BILL
- 12/07-TY FR. J. CASTEEN
- 19970205-TY FR. R. CAREY TO. M/M
- 19970213-NOTE FR. M. STANTON RE. CORP/FD
- 19971014-MEMO FR. P.KELLEHER RE. PULSE S
- 19971230 KFCLIRITIES TRANSACTION

Additional Info

- (blank)
- CANCER CENTER AWARDED COMPREHENSIVE CENTE
- CORRESPONDENCE, SCULPTURE INVOICES, LIST, ART
- GIFT TO F. BERRY MD PROFESSORSHIP-PEDIATRIC AN

Reset

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