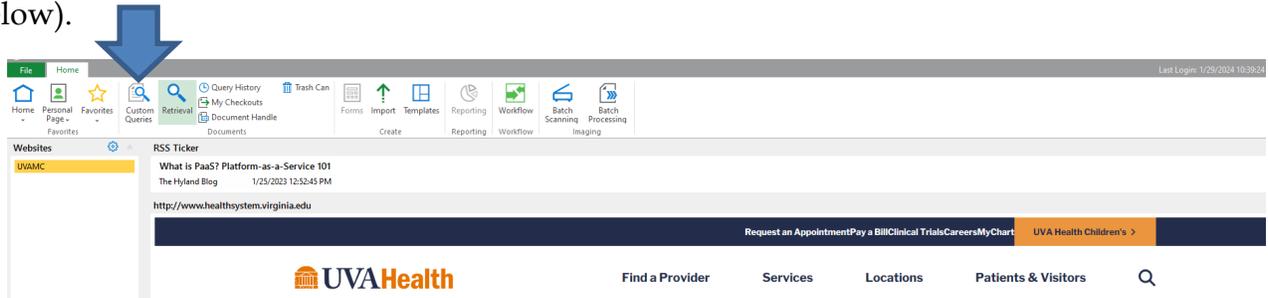


# How to Search FUND Files in OnBase

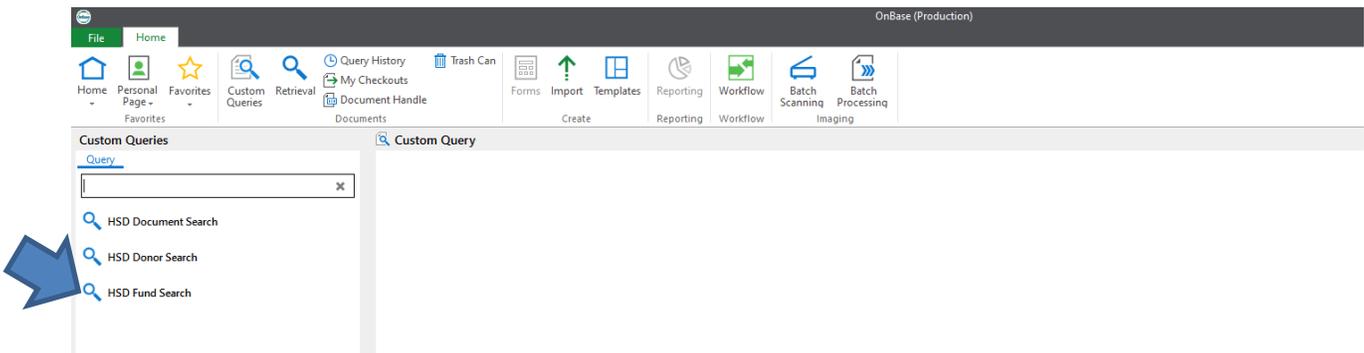
The HSD Fund Search is used for finding information on funds like professorships, scholarships, etc.

- Fund files are organized in OnBase using allocation code(s), project number(s) and the name of the fund.
  - i. A project number is part of the account number
- Generally, the name of the fund includes the donor's name, honoree's name, and/or the name of the benefitting department.
  - ii. **When searching fund files, you will get more results when searching by name and it's possible that a fund document was filed without an allocation code or project number (i.e.: the account hadn't been created yet)**

2. Once in OnBase, click on the Custom Queries button in the ribbon at the top of the screen (see below).

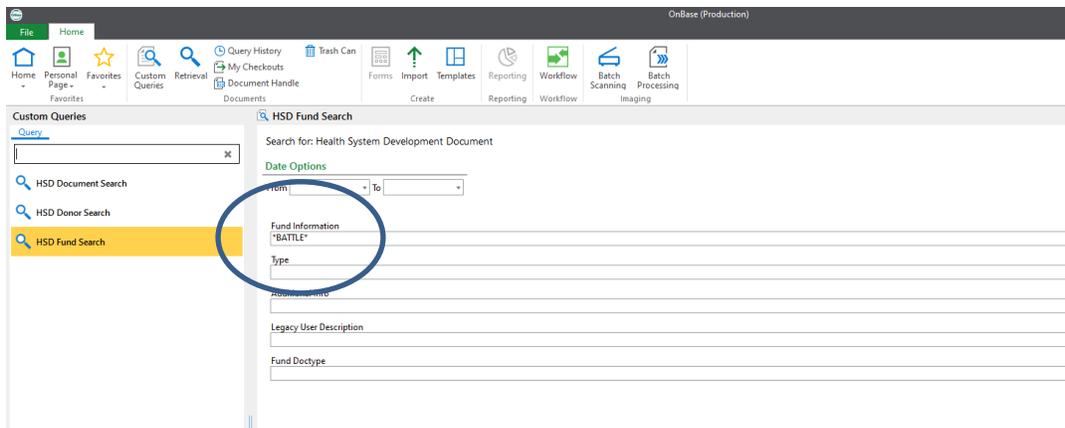


3. Click on the HSD Fund Search query (see below).



4. Let's search for The Battle Fellowship in Pediatrics

- In the Fund Information box type:
  - i. Asterick, BATTLE, Asterick (example: \*BATTLE\*)
- **ASTERICKS should always be used in front and behind your search criteria**



## 5. Search Results:

Icon	Fund Information	Fund Doctype	Legacy User Description	Additional Info
<input type="checkbox"/>	01068 1997 BATTLE FELLOW SCHOLAR AWARD	MISC.		MEMORANDUM FROM LISA KNAPP-RE: PINWHEEL DISTRIBUTION (COPY)
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19930513-MEMO. FR. A.ROGOL RE. CMC RESEA	REQUEST FOR INPUT FOR AWARD RECIPIENT SELECTION
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19970205-TY FR. R.CAREY RE. 105 SHARES	GIFT FROM MR./MRS. WILLIAM C. BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	MISC.	NO DATE-ARTICLE *TEAMING UP TO SPEED RES	OVERVIEW
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19980730-INFORMATION NOTE	NOTE TO LOCATE ADDITIONAL DONOR INFORMATION
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19950113-TY FR. R.ROBERTS	GIFT TO THE CHILDREN'S MEDICAL CENTER FR BARRY/ BILL BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19940127-TY FR. J.CASTEEN	GIFT TO THE CHILDREN'S MEDICAL CENTER-FROM W. C. BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19981009-MEMO FR.L.KNAPP RE.PINWHEEL DIS	ISSUE OF PINWHEEL DISTRIBUTION
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	MISC.	NO DATE-CMC PINWHEEL?	ISSUE-MAILING LIST/ CONTACT INFORMATION PAGE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	CORRESPONDENCE/CONTACTS	19950131-TY FR. R.SWEENEY RE. 33 SHARES	GIFT OF 33 SHARES OF STOCK FROM MR./MRS. WILLIAM C. BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	GIFT INFORMATION	19971230-64 WACOVIA SHARES	SECURITIES TRANSACTION-64 SHARES WACOVIA-BATTLE FUND
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	GIFT INFORMATION	19951231-9,731.25 GIFT	GIFT REPORT-MRS. BARRY W. BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	GIFT INFORMATION	19951208-GIFT INFORMATION	DONATION INFORMATION-MRS. BARRY W. BATTLE
<input type="checkbox"/>	01068 BATTLE FELLOWSHIP IN PEDIATRICS	MISC.	20000519-E-MAIL	INCREASE ANNUAL AWARD

6. As you can see, the results include information for the Battle Fellow Scholar Award and the Battle Fellowship in Pediatrics. However, both have the same allocation code. Perhaps the fund was renamed at a later date. This is why searching by name for fund files is better. 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 22 for this example.)

7. For this example, I only want to see gift agreements that the Battles have signed, which should be filed under the Fund Doctype of Legal, so I'm going to click on LEGAL under Fund Doctype.

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

Icon	Fund Information	Fund Doctype	Legacy User Description	Additional Info
	01068 BATTLE FELLOWSHIP IN PEDIATRICS	LEGAL	19930812-CMC BATTLE FELLOW SCHOLAR-SUMMA	SUMMARY, SELECTION CRITERIA AND ANNOUNCEMENT OF PROGRAM

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 Fund 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 allocation or project number, you should still use ASTERICKS at the front and end of the it.**
  - You can narrow your results by including a Type specific to Fund Files. They are – (1) Awards/Prizes, (2) Endowment, (3) Fellowships, (4), Lectureships, (5) Library/Book Funds, (6) Other Named Funds, (7) Professorships, (8) Research Endowments, and (9) Scholarships.
  - Or you can leave the Type field blank and filter on the results to narrow your search results