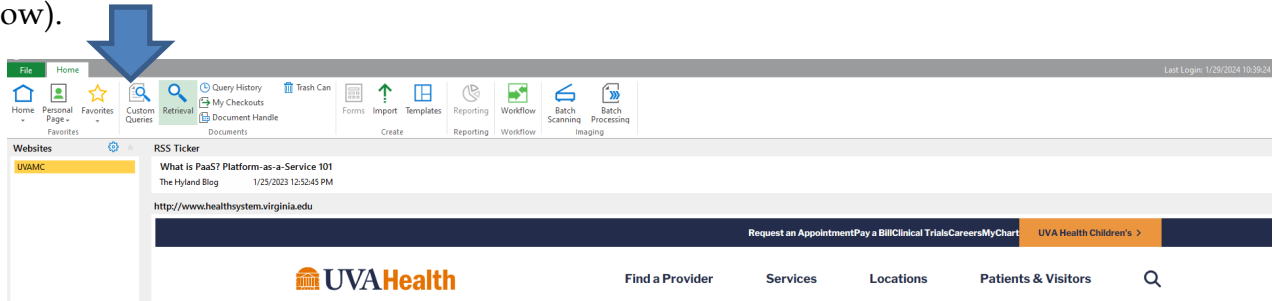


# How to Search OTHER DOCUMENTS in OnBase

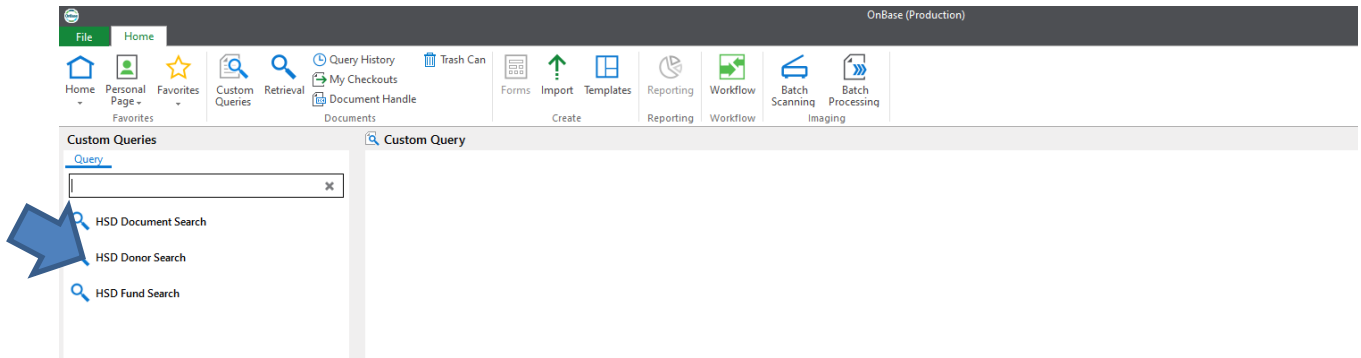
Other types of documents filed in OnBase include (1) Named Area and Rooms, (2) Named Buildings, (3) Named Centers and Institutes, (4) Named Misc., (5) Volunteer Participation, (6) Reference, (7) Campaign, and (8) Health Foundation.

- Other documents are organized in OnBase using the above mentioned types

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

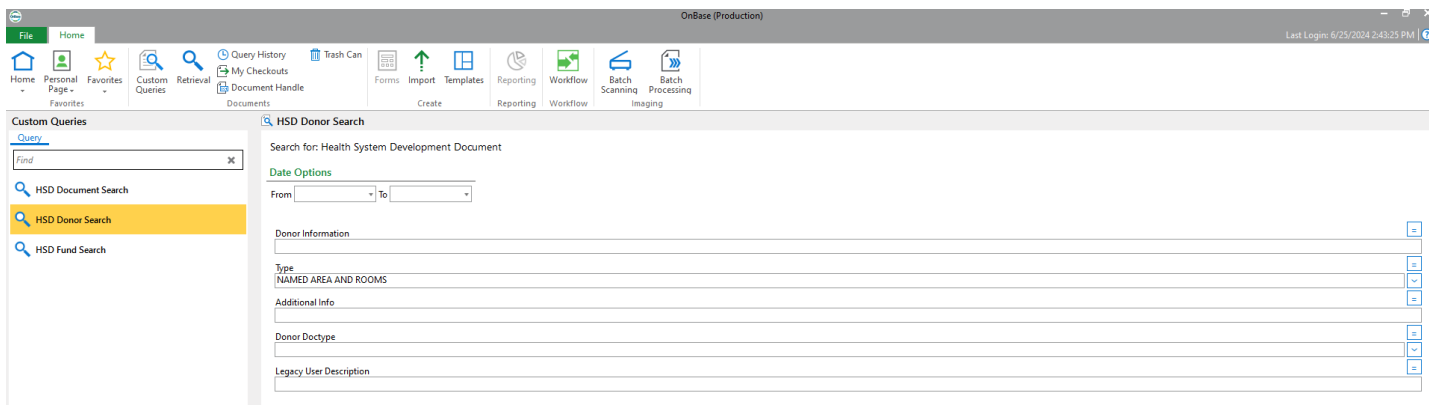


2. Click on the HSD Donor Search query (see below).



3. In the Type box type choose the type of other document that you're searching via the drop-down menu/arrow. In this example, I chose Named Area and Rooms.

- Referencing the example below, if you know what named area/room you're looking for, you can type a last name, etc., in the Donor Information field to narrow your results
- **ASTERICKS should always be used in front and behind your search criteria**
- Capitalization is OnBase's default



4. Hit Enter or click on the Search button at the bottom right of the screen.

OnBase (Production)



File Home Document

Home Personal Page Favorites Custom Queries Retrieval My Checkouts Document Handle Forms Import Templates Reporting Workflow Batch Scanning Batch Processing

Custom Queries HSD Donor Search - Search Results: 15 Document(s)

Icon	Donor Information	Donor Doctype	Legacy User Description	Additional Info
	BJORING		BJORING CONF ROOM	EMAIL FR LORI CWALINA-INFO ON CONF. ROOM NAMING COMMITTEE
	BJORING		BJORING CONF ROOM	EMAIL TO R. SWEENEY FR L. CWALINA-NAMING OPPORTUNITY REQUEST
	DI BENEDETTO		DI BENEDETTO LIBRARY	NAMING OPPORTUNITY REPORT/APPROVAL LTR FR DEBORAH DONNELLY
	DU BOSE		DU BOSE, SARAH FUND FAMILY EDUCATION RM	REPORT ON NAMINGS
	FALK		DR. RALPH & MARIAN FALK MEDICAL RES LAB	DONOR RECOGNITION DOCUMENT-RESEARCH LAB NAME
	FOOD LION		FOOD LION NICU	PROPOSED NAME FOR NICU AT THE CHILDREN'S HOSPITAL
	GROSS		CHARLES W. GROSS RHINOLOGY LABORATORY	BOV MTG NOTES ON C. GROSS LABORATORY NAMING
	HAMLIN		JAMES T. HAMLIN III MD READING RM IN HSL	REPORT ON NAMINGS
	HOOK		EDWARD W. HOOK JR. LIBRARY	BOV NOTES; HOOK LIBRARY BACKGROUND DOC
	HOSPITAL AUXILIARY		HOSPITAL AUXILIARY HOSPITALITY HOUSE	RENAMING DOC AND ASSOCIATED EMAILS
	HOSPITAL AUXILIARY		HOSP. AUX. NURTURING & COUNSELING AREA	NAMING OPPORTUNITY DOC, BOV BOOK ENTRY, APPROVAL LTR, FLOOR
	SHURE		RANDL SHURE PED EPILEPSY MONITORING UNIT	EMAIL FR BETHANYHURLEY-NAMING OPPORTUNITY REQUEST
	SHURE		RANDL SHURE PED EPILEPSY MONITORING UNIT	LTR FR KBR TO R. SWEENEY-NAMING REQUEST/ APPROVAL
	WAGNER		ROBERT R. WAGNER CONF. RM IN JORDAN HALL	BOV REPORT ON CONFERENCE ROOM NAMING; BIO
	HEALTH SCIENCES CENTER CHAPEL	CORRESPONDENCE/ CONTACTS	UNKNOWN DATE-LIST OF DONORS	DONORS FOR CHAPEL RENOVATION AND FURNISHINGS

5. As you can see, the results include information for multiple named areas/rooms. 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
  - You can custom filter using the drop down under the column headings 
  - To clear filters under the column headings, click on the x next to the filter icon 
    - It's important that you clear your filters under column headings or it may continue to limit your results
    - You can also sort by the column headings
- The # of documents will change based on your filters (There's 15 for this example.)

6. 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
  - 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