UAB FINANCIAL AFFAIRS
The University of Alabama at Birmingham

Logging into OnBase

Go to the **myUAB Portal** and Select **OnBase.**	*myApps* — Campus Email, UAB Campus Learning System, Oracle HR & Finance, BlazerID Central, OnBase, WAM, LinkedIn Learning, eLAS, Box.com, AskIT, Employee Directory, LMS, Manage Apps
You may be prompted to enter your **BlazerID** and **strong password** to login.	UAB Central Authentication System. Enter your BlazerID and Password: BlazerID: ___ Password: ___ Log In. Having trouble logging in? Visit BlazerID Central for help or to reset your password. Contact AskIT at 205-996-5555 if you have any problems using this system or your BlazerID. Security Notice. For security reasons, quit your web browser when finished accessing services that require authentication. Be wary of any program or web page that asks for your BlazerID and password. Legitimate UAB web pages prompting for your BlazerID and password should have addresses that begin with https:// (not http:) and contain "uab.edu" Also, your browser should visually indicate that you are accessing a secure page, usually a padlock icon. This system is available only for authorized purposes by authorized users. Use for any other purpose may result in disciplinary action or criminal prosecution against the user.
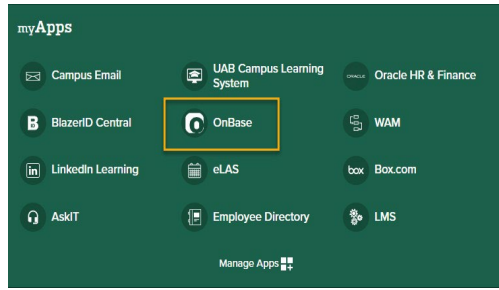
Setting Custom Queries as the Default Search Engine

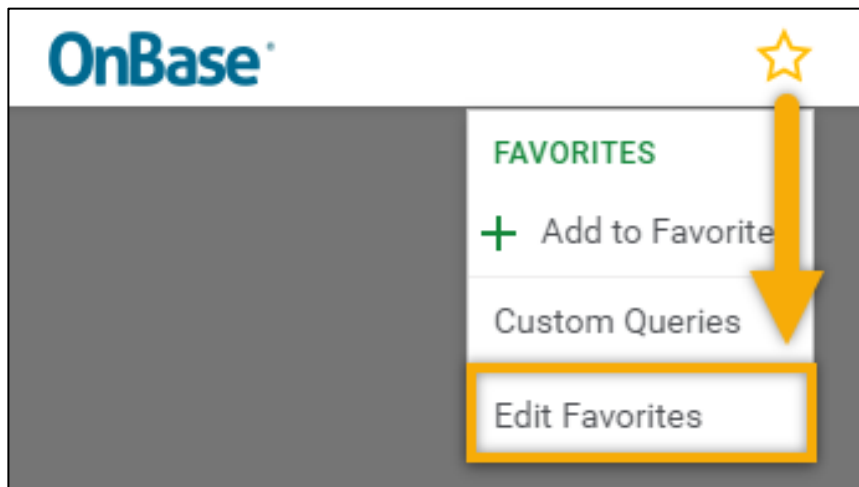|	
Click the **Main Menu** (hamburger icon) located to your left.	☰ Document Retrieval **OnBase**
Click **Custom Queries.**	✕ Document Retrieval **OnBase** DOCUMENT — Document Retrieval, Custom Queries FOLDERS — Open Folders USER — Locked Objects
Click the **Favorites** (star icon) located to your top right.	☰ Custom Queries **OnBase** ☆
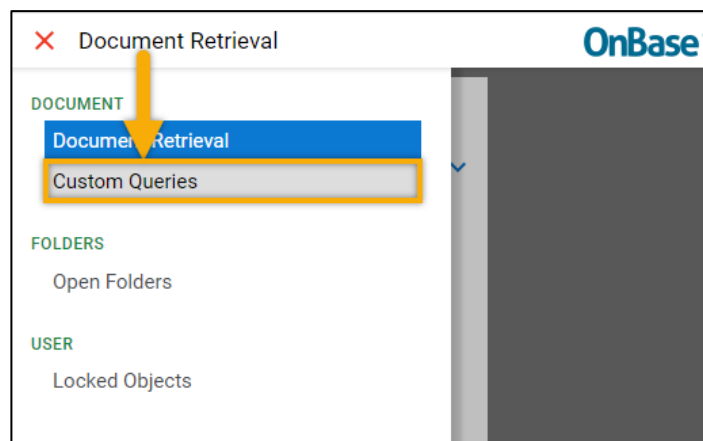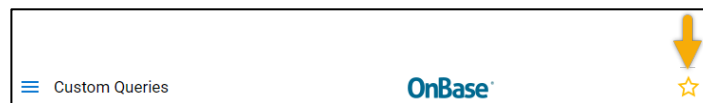
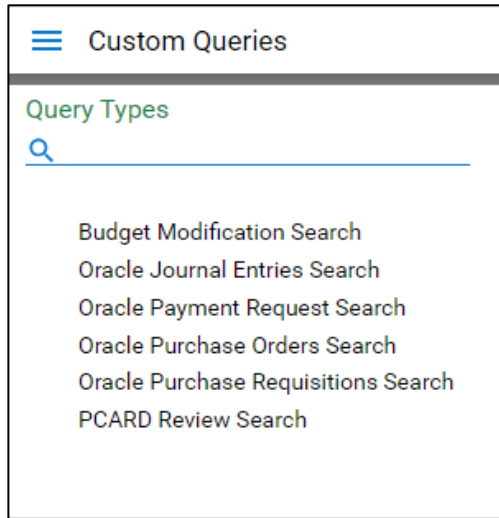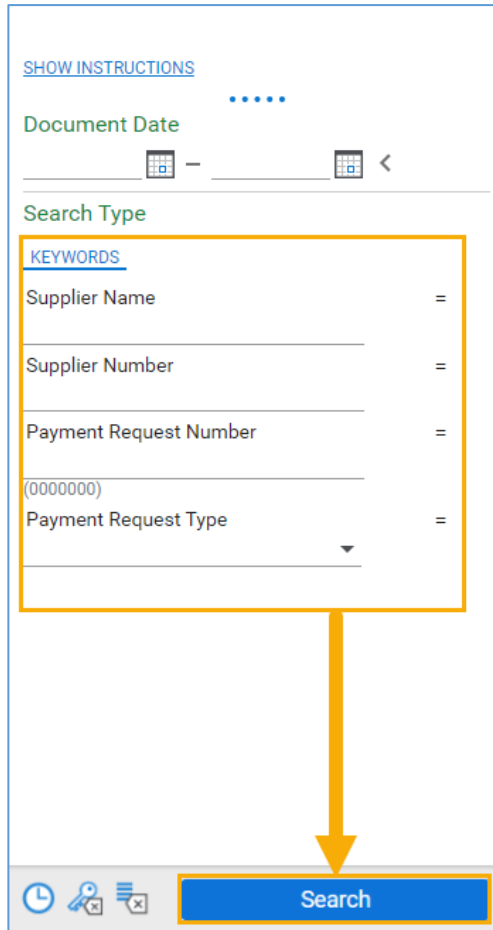|	
Click **Add to Favorites.**	
Click **OK.**	
Click the **Favorites** (star) icon and then **Edit Favorites**.	
Click the **Home** icon that appears next to the Custom Queries listing. The icon will turn blue to indicate that this favorite is on the homepage. Click **Save and Close**. The **Custom Queries** panel will now be the default search engine when you log into OnBase.	
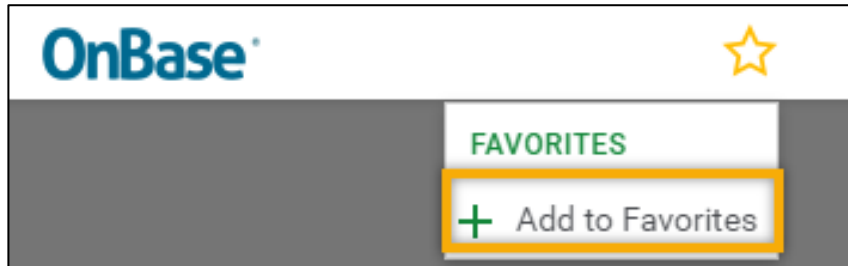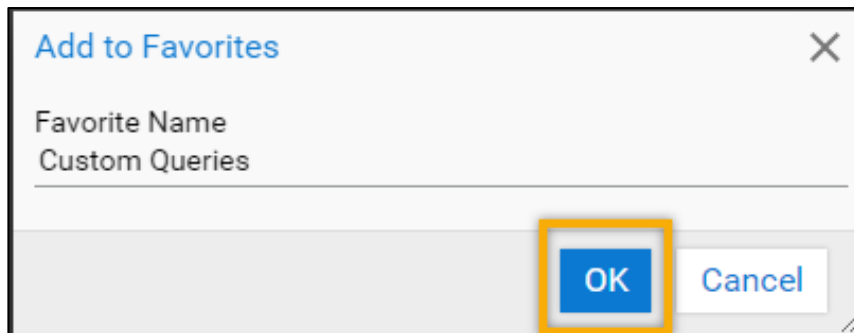
![UAB FINANCIAL AFFAIRS - The University of Alabama at Birmingham]
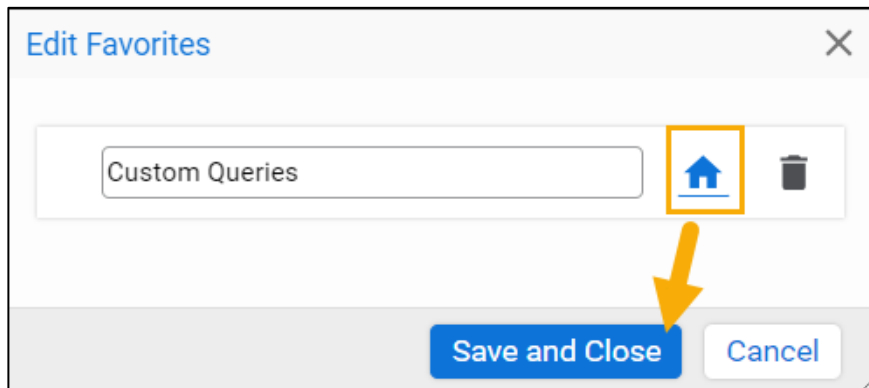
Performing a Search in OnBase

Go to the **Custom Queries** panel and select your desired document type.	**Custom Queries** Query Types 🔍 _____ Budget Modification Search Oracle Journal Entries Search Oracle Payment Request Search Oracle Purchase Orders Search Oracle Purchase Requisitions Search PCARD Review Search
Enter your search criteria. Click the **Search** button.	SHOW INSTRUCTIONS • • • • • Document Date _____ 📅 — _____ 📅 < Search Type KEYWORDS Supplier Name ＝ Supplier Number ＝ Payment Request Number ＝ (0000000) Payment Request Type ＝ ▼ 🕐 🔑 📄 **Search**

Your **search results** will appear in the pane at the top right. A **viewing pane** will appear to your bottom right.

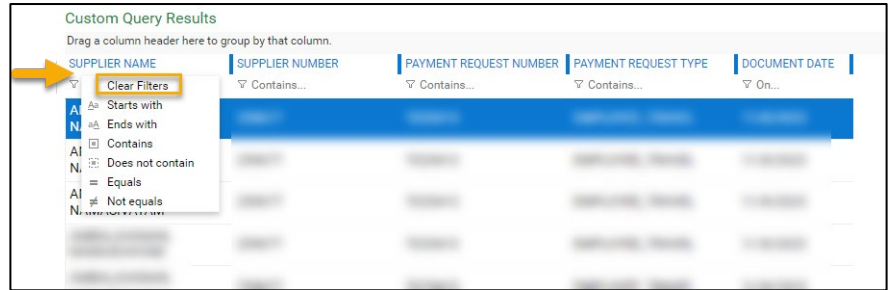Adjust the sizes of the panes by dragging the pane(s) up or down.
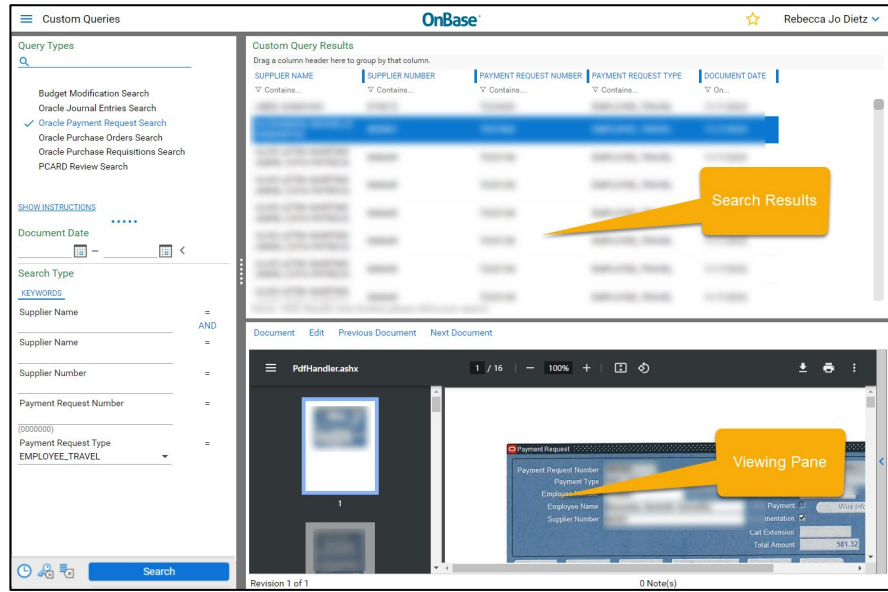
Filtering Your Search Results

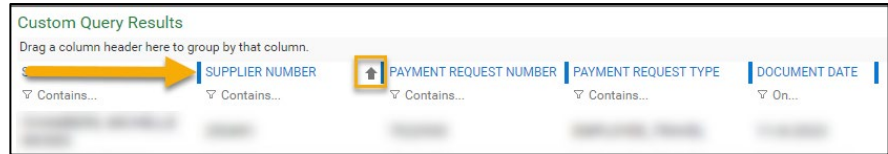Enter a value in one of the fields beneath the **column name**.
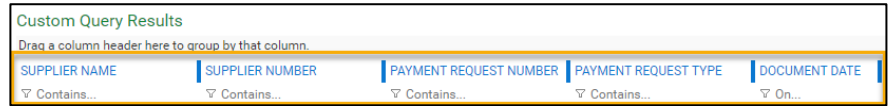
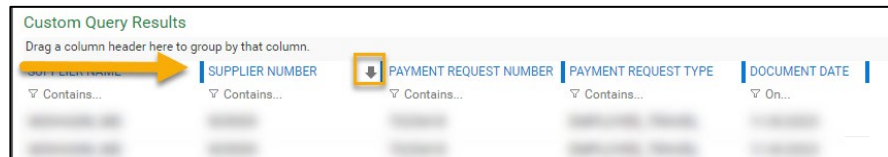To remove the filter, click on the filter icon and then select **Clear Filters.**

Sorting Search Results

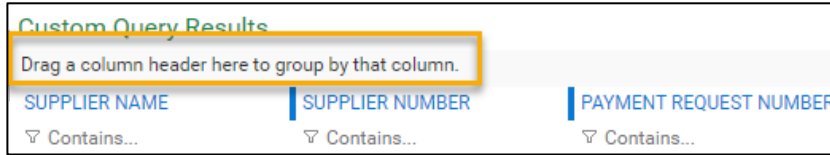Click on the desired **column name**. An up arrow will appear to indicate **Sorted Ascending**

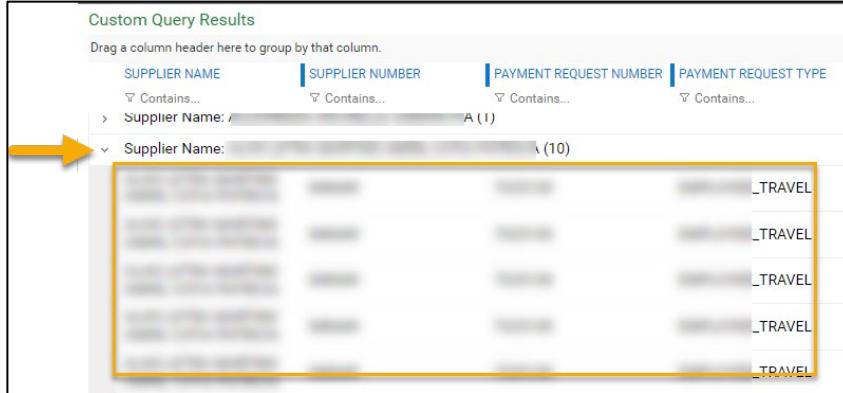Click the column name again for down arrow/ **Sorted Descending**.

Grouping Search Results

Drag the desired **column name** to the area that appears directly above the columns.


The results will then be **grouped** according to the selected search criteria.

Click on the **arrow** next to each group listing to find the individual search results.

To **clear** the grouped listing view:

- Find the **column name** in the upper right corner of the Search Results pane
- Move the mouse pointer to the right of the column name.
- **Click the X** that appears next to the column name.
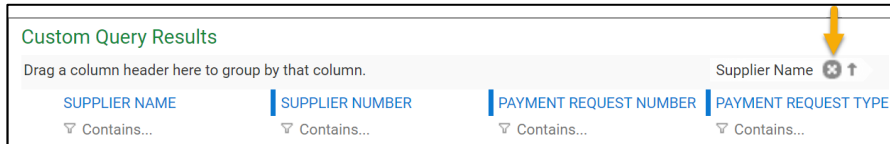
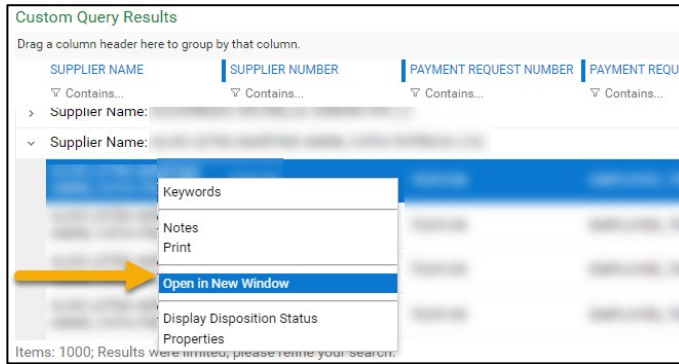### Viewing Backup Documentation in OnBase

To view attached documentation in the **Viewing Pane**:

- From the Query Results list, **double click** the desired listing
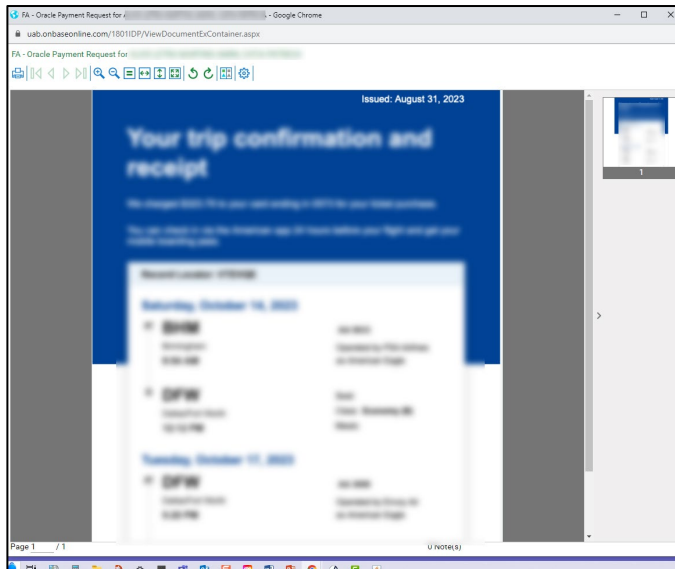- You will see any attached documentation below, in the **Viewing Pane**
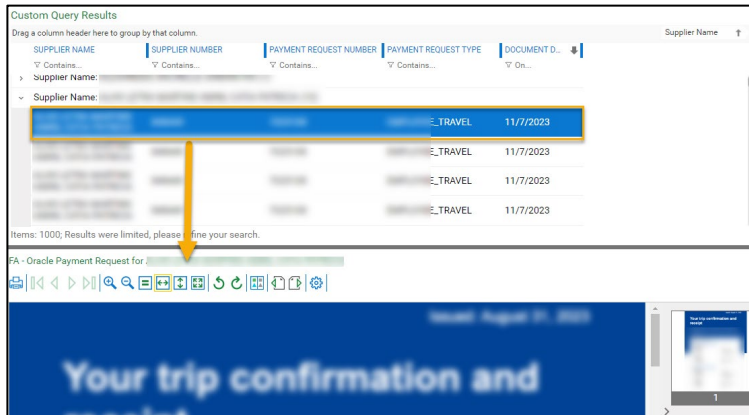
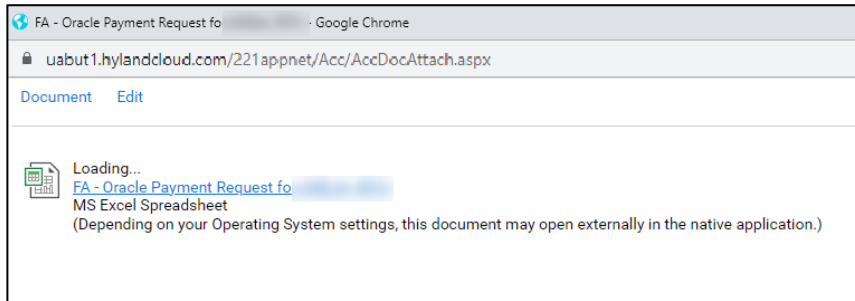To open attached documentation in a **New Window:**

- **Right Click** the desired listing.
- Click **Open in New Window**

If the documentation is formatted as a **PDF or image**, you will see a screen similar to the one shown.


If the documentation is formatted as a **Microsoft file**, you will see a link that allows you to download the content for viewing as shown.

Note: When using the **Chrome browser**, the document may download automatically. To view the downloaded document:
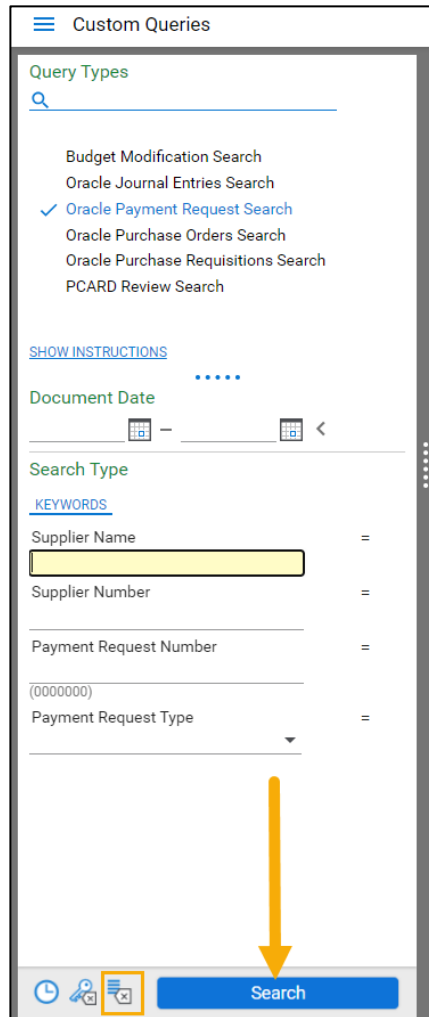
- Click the down arrow to open the Recent downloads list.
- Click the file name to open the document.

FINANCIAL AFFAIRS
The University of Alabama at Birmingham
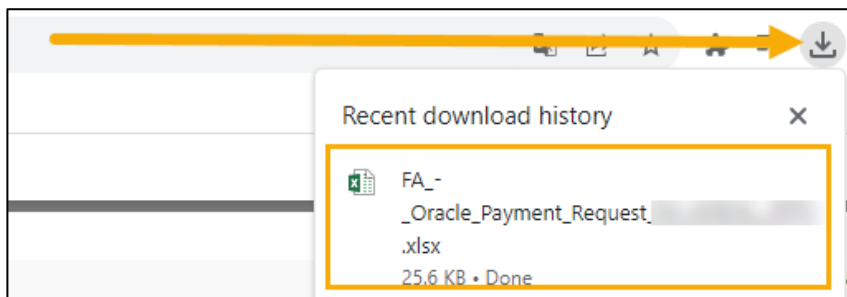
Creating New Queries in OnBase

Go back to the **Custom Queries** panel, update your search criteria, and then click on the **Search** button.

Click on **Clear All** to start a search with a blank slate.

Logging Out of OnBase

Click your name in the top right corner of the screen and then **Logout**.