

Searching for Documents in ImageNow

Searching for Documents

The Gift & Endowment ImageNow system allows users to search for data in a variety of ways. Users should familiarize themselves with the Gift & Endowment ImageNow system document keys (listed below) prior to executing searches.

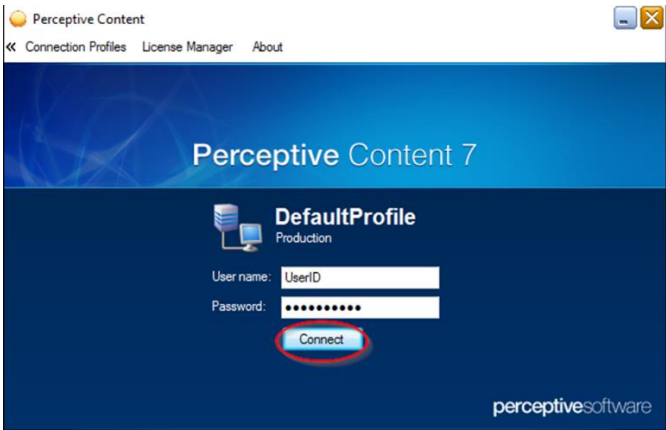
As noted above, users will be granted access only to documents relating to the gifts and endowments held by their MBU. Users will not have access to documentation relating to gifts and endowments held by other University business units.

Searchable Fields

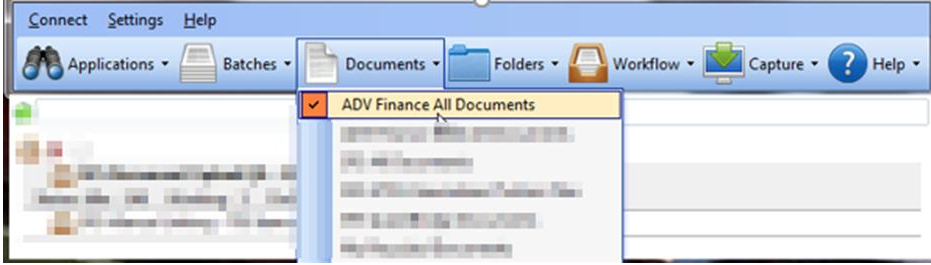
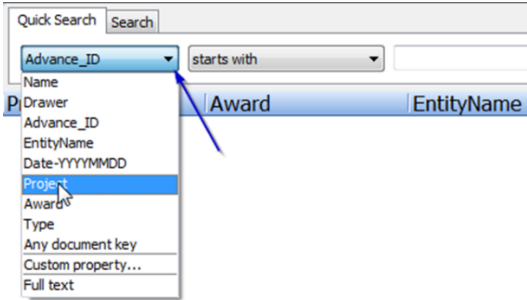
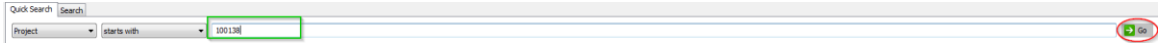
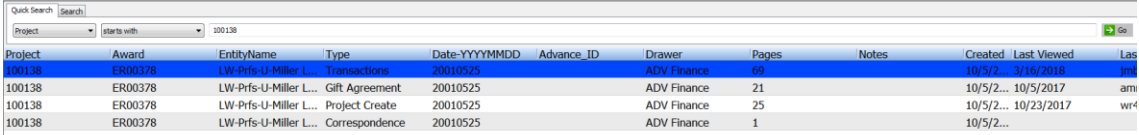
The searchable fields below are also known as the “Document Keys”:

- Advance_ID = Development/Gift Accounting Reference Number
- EntityName = Oracle Award Short Name
- Date-YYYYMMDD = Oracle Award Active Start Date
- Project = Oracle Project Number
- Award = Oracle Award Number
- Type = Document Category:
 - Gift Agreement = document utilized by University Advancement and signed by the donor in securing a gift/endowment
 - Project Create = information/documentation utilized by Investment Accounting for creating the gift/endowment project and award in the Integrated System
 - Transactions = transactional documents related to the gift/endowment
 - Correspondence = important communications regarding a gift/endowment account

Single Condition Searches:

Step	Action
1.	<p>Open and Sign-in to ImageNow.</p> 

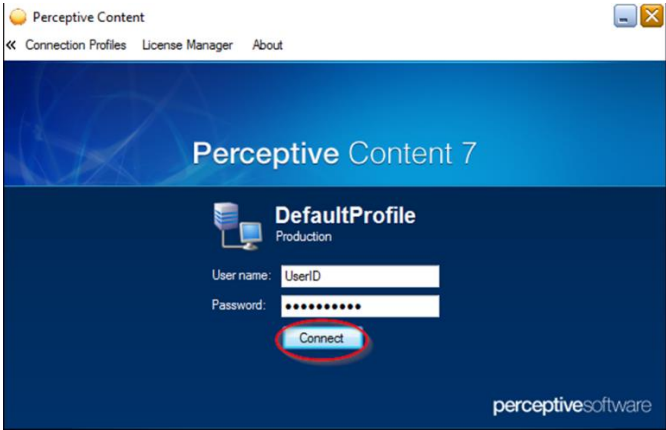
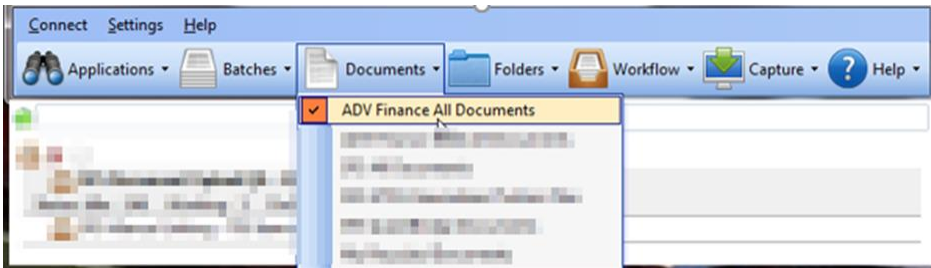
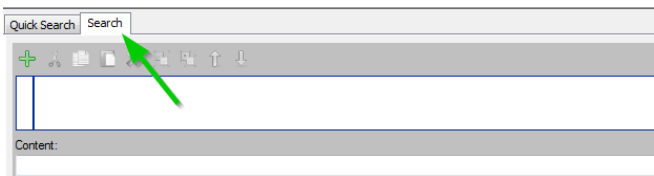
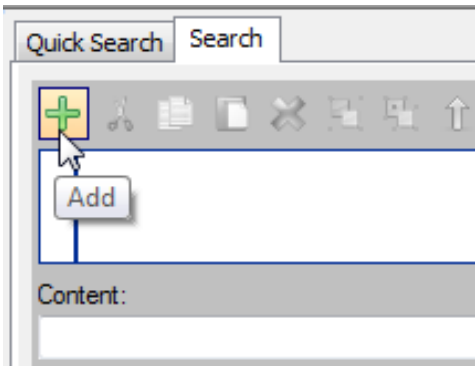
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Step	Action																																																												
2.	<p>Select the “Documents” dropdown and choose the appropriate set of ADV Finance documents.</p> 																																																												
3.	<p>Determine which “Searchable Field” to use for your query (i.e., Advance ID, EntityName, Date, Project, Award, Type).</p> 																																																												
4.	<p>Enter the corresponding criteria based on the field chosen and click “Go” or press “Enter” on your keyboard.</p> 																																																												
5.	<p>All content meeting the specified criteria is returned.</p>  <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <thead> <tr> <th>Project</th> <th>Award</th> <th>EntityName</th> <th>Type</th> <th>Date-YYYYMMDD</th> <th>Advance_ID</th> <th>Drawer</th> <th>Pages</th> <th>Notes</th> <th>Created</th> <th>Last Viewed</th> <th>Last Modified</th> </tr> </thead> <tbody> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Transactions</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>69</td> <td></td> <td>10/5/2...</td> <td>3/16/2018</td> <td>jmi</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Gift Agreement</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>21</td> <td></td> <td>10/5/2...</td> <td>10/5/2017</td> <td>ami</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Project Create</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>25</td> <td></td> <td>10/5/2...</td> <td>10/23/2017</td> <td>wr4</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Correspondence</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>1</td> <td></td> <td>10/5/2...</td> <td></td> <td></td> </tr> </tbody> </table>	Project	Award	EntityName	Type	Date-YYYYMMDD	Advance_ID	Drawer	Pages	Notes	Created	Last Viewed	Last Modified	100138	ER00378	LW-Prfs-U-Miller L...	Transactions	20010525		ADV Finance	69		10/5/2...	3/16/2018	jmi	100138	ER00378	LW-Prfs-U-Miller L...	Gift Agreement	20010525		ADV Finance	21		10/5/2...	10/5/2017	ami	100138	ER00378	LW-Prfs-U-Miller L...	Project Create	20010525		ADV Finance	25		10/5/2...	10/23/2017	wr4	100138	ER00378	LW-Prfs-U-Miller L...	Correspondence	20010525		ADV Finance	1		10/5/2...		
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6.	<p>End Procedure.</p>																																																												

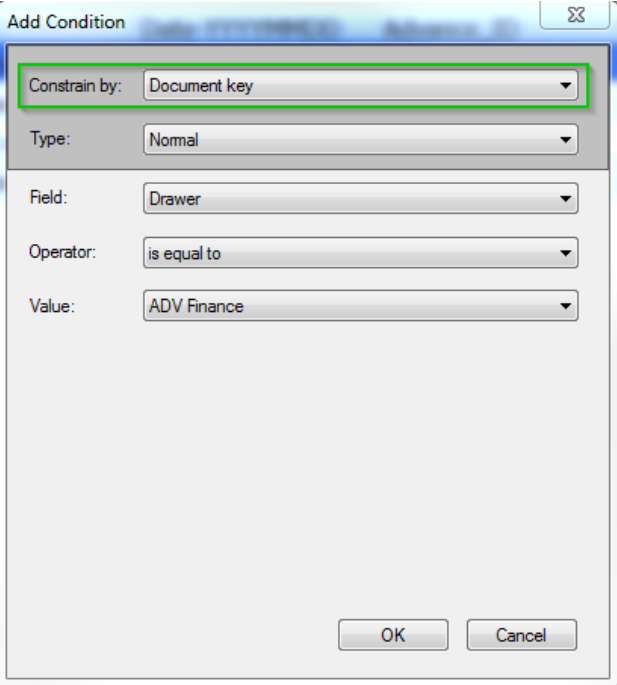
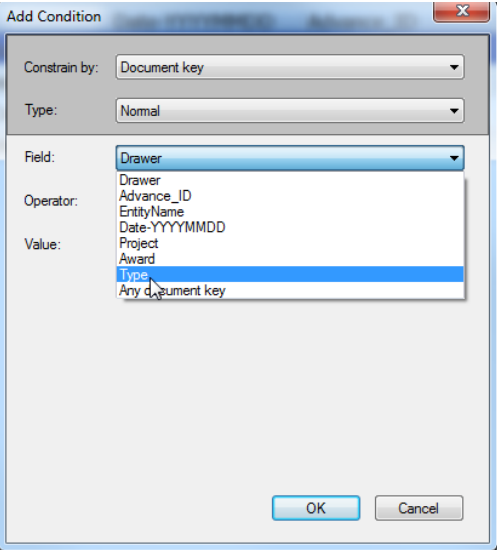
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Multiple Condition Searches:

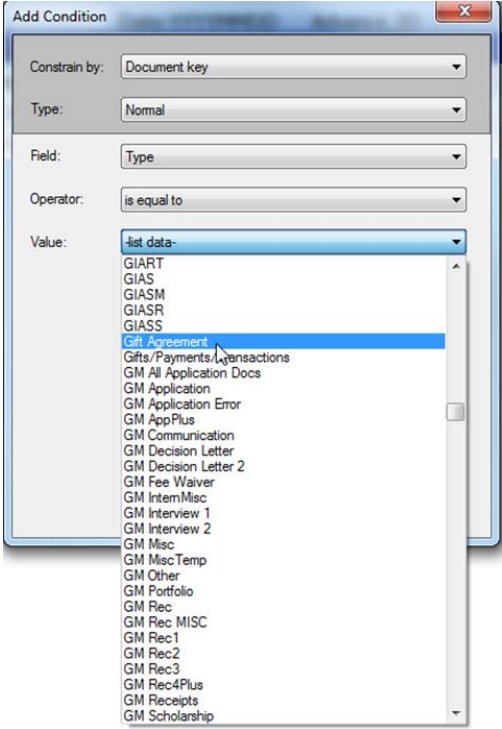
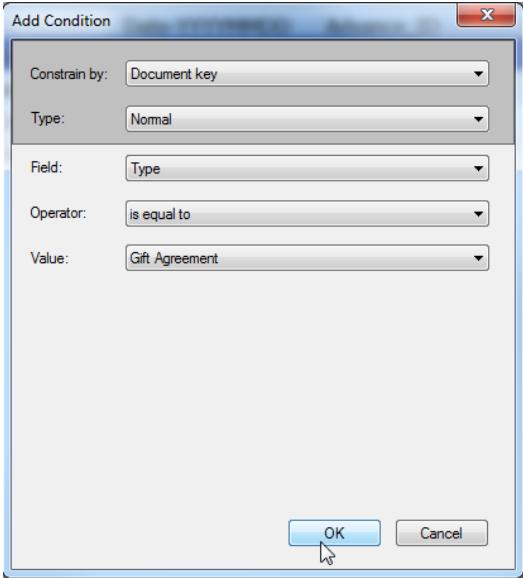
For this exhibit, let's search for all Gift Agreements with an FY17 start date.

Step	Action
1.	<p>Open and Sign-in to ImageNow.</p>  <p>The screenshot shows the Perceptive Content 7 login interface. At the top, there are navigation links for 'Connection Profiles', 'License Manager', and 'About'. The main heading is 'Perceptive Content 7'. Below this, it says 'DefaultProfile Production'. There are two input fields: 'User name: UserID' and 'Password: *****'. A 'Connect' button is located below the password field and is circled in red. The Perceptive Software logo is in the bottom right corner.</p>
2.	<p>Select the “Documents” dropdown and choose the appropriate set of ADV Finance documents.</p>  <p>The screenshot shows the application menu of the ImageNow software. The menu items are 'Connect', 'Settings', and 'Help'. Below these are several icons and dropdown menus: 'Applications', 'Batches', 'Documents', 'Folders', 'Workflow', 'Capture', and 'Help'. The 'Documents' dropdown is open, showing a list of document sets. The first item, 'ADV Finance All Documents', is selected and highlighted in yellow.</p>
3.	<p>Change from the “Quick Search” tab to the “Search” tab.</p>  <p>The screenshot shows the search interface. There are two tabs: 'Quick Search' and 'Search'. The 'Search' tab is selected. A green arrow points to the 'Search' tab. Below the tabs is a search bar with a green plus sign icon on the left and several other icons on the right. Below the search bar is a 'Content:' label and a text input field.</p>
4.	<p>Click on the Green + symbol to specify your search conditions.</p>  <p>The screenshot shows the search interface. A mouse cursor is clicking on the green plus sign icon. An 'Add' dialog box is visible, indicating that a new search condition is being added. The dialog box has a blue border and the word 'Add' in a white box. Below the dialog box is the 'Content:' label and the text input field.</p>

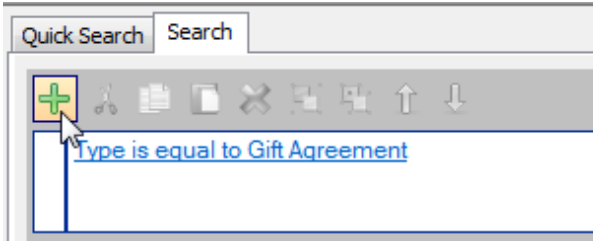
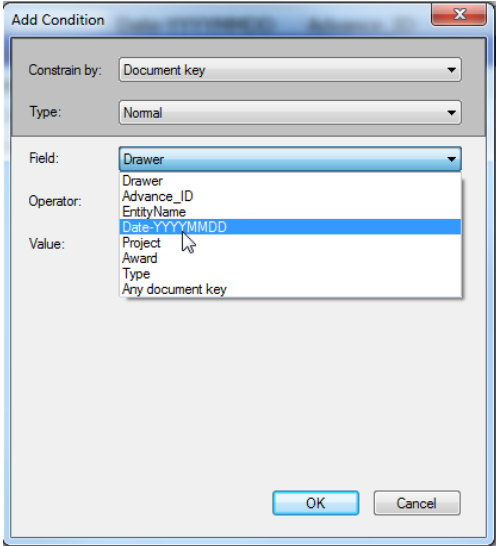
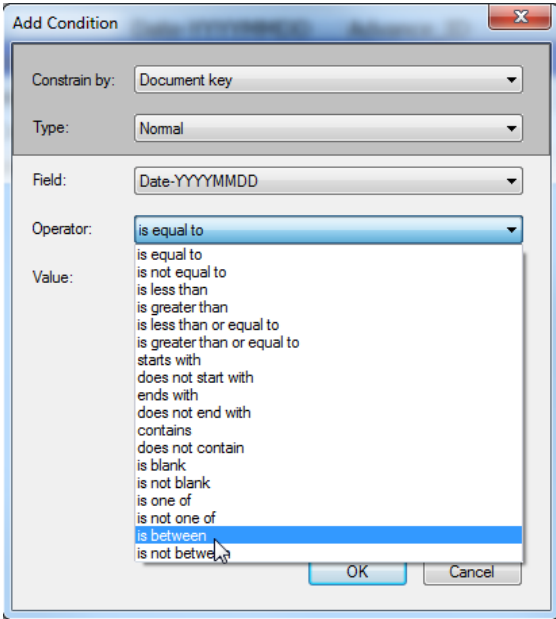
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Step	Action
5.	<p>Choose an item from the “Add Condition” dialogue box related to how you would like to limit your search. In most instances you will want to leave “Constrain by” set to “Document key” as this will allow for searching by the different fields that have been tailored for the system.</p> 
6.	<p>Select the “Field” dropdown to choose the appropriate “Document Key.” For our purposes, we will select “Type.”</p> 

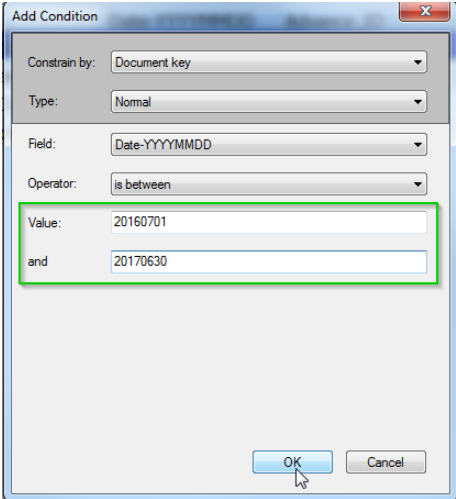
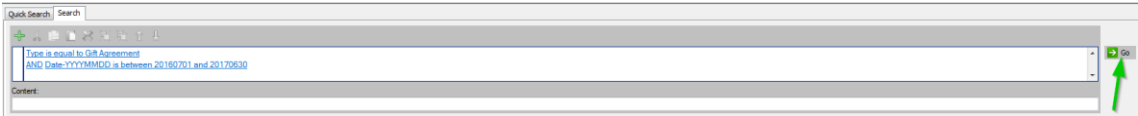
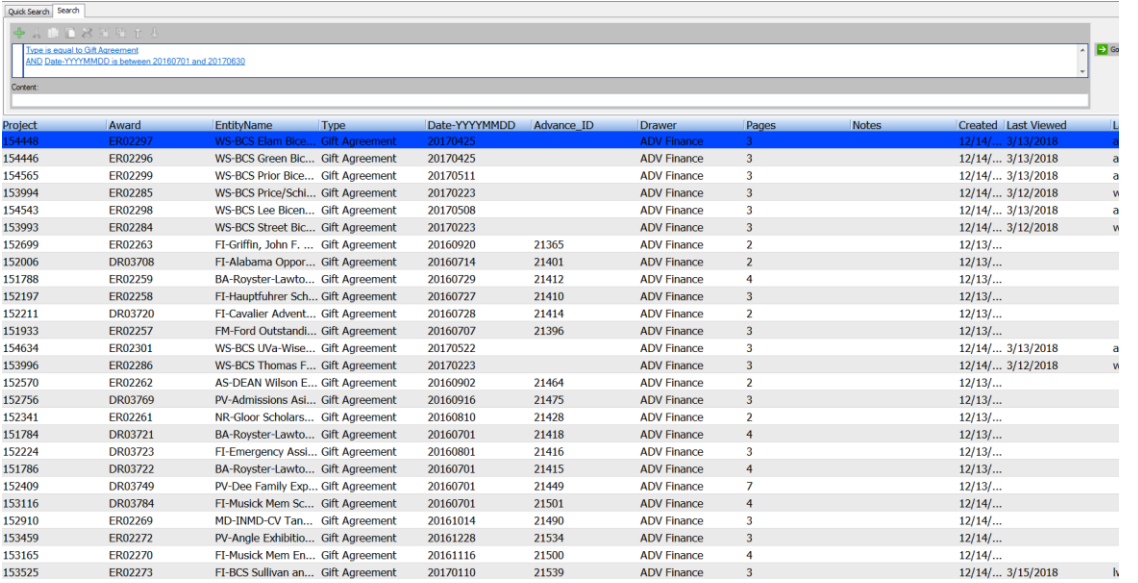
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Step	Action
7.	<p>Change the “Value” to the desired “Type.”</p> <p>Note: All existing ImageNow values are returned in the dropdown. Be sure to scroll through to find the appropriate value related to the Gift & Endowment ImageNow system.</p>  <p>The screenshot shows the 'Add Condition' dialog box with the following settings: 'Constrain by' is 'Document key', 'Type' is 'Normal', 'Field' is 'Type', and 'Operator' is 'is equal to'. The 'Value' dropdown is open, displaying a list of values. 'Gift Agreement' is highlighted in blue, and a mouse cursor is pointing at it. Other visible values include GIART, GIAS, GIASM, GIASR, GIASS, Gifts/Payments/Transactions, GM All Application Docs, GM Application, GM Application Error, GM AppPlus, GM Communication, GM Decision Letter, GM Decision Letter 2, GM Fee Waiver, GM InternMisc, GM Interview 1, GM Interview 2, GM Misc, GM MiscTemp, GM Other, GM Portfolio, GM Rec, GM Rec MISC, GM Rec1, GM Rec2, GM Rec3, GM Rec4Plus, GM Receipts, and GM Scholarship.</p>
8.	<p>Once selected, click “OK.”</p>  <p>The screenshot shows the 'Add Condition' dialog box with the following settings: 'Constrain by' is 'Document key', 'Type' is 'Normal', 'Field' is 'Type', and 'Operator' is 'is equal to'. The 'Value' dropdown is now closed and displays 'Gift Agreement'. The 'OK' button is highlighted in blue, and a mouse cursor is pointing at it. The 'Cancel' button is also visible.</p>

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Step	Action
9.	<p>Click the Green + button to add another condition. (Note the previous search criteria shows correctly.)</p> 
10.	<p>Change the “Field” dropdown to the desired document key. For our purposes, “Date-YYYYMMDD” should be selected.</p> 
11.	<p>Select the appropriate “Operator.” For our purposes, “is between” should be selected.</p> 

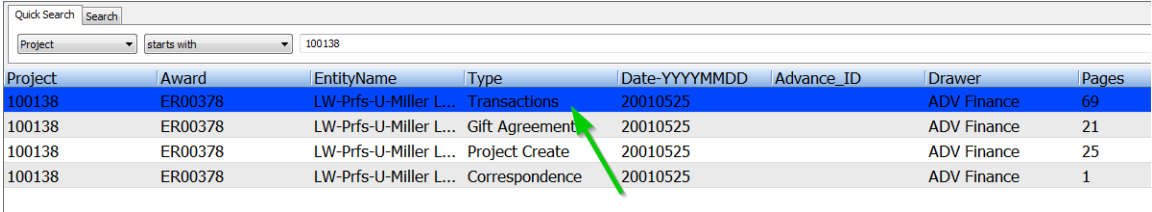
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12.	<p>Notice the option to enter two criteria appears. Enter the date range and then click “OK.”</p> 																																																																																																																																																																																																																																																																																																									
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<tr><td>151788</td><td>ER02259</td><td>BA-Royster-Lawto...</td><td>Gift Agreement</td><td>20160729</td><td>21412</td><td>ADV Finance</td><td>4</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>152197</td><td>ER02258</td><td>FI-Hauptfuhrer Sch...</td><td>Gift Agreement</td><td>20160727</td><td>21410</td><td>ADV Finance</td><td>3</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>152211</td><td>DR03720</td><td>FI-Cavaller Advent...</td><td>Gift Agreement</td><td>20160728</td><td>21414</td><td>ADV Finance</td><td>2</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>151933</td><td>ER02257</td><td>FM-Ford Outstandi...</td><td>Gift Agreement</td><td>20160707</td><td>21396</td><td>ADV Finance</td><td>3</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>154634</td><td>ER02301</td><td>WS-BCS UVa-Wise...</td><td>Gift Agreement</td><td>20170522</td><td></td><td>ADV Finance</td><td>3</td><td></td><td>12/14/...</td><td>3/13/2018</td></tr> <tr><td>153996</td><td>ER02286</td><td>WS-BCS Thomas F...</td><td>Gift Agreement</td><td>20170223</td><td></td><td>ADV Finance</td><td>3</td><td></td><td>12/14/...</td><td>3/12/2018</td></tr> <tr><td>152570</td><td>ER02262</td><td>AS-DEAN Wilson E...</td><td>Gift Agreement</td><td>20160902</td><td>21464</td><td>ADV Finance</td><td>2</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>152756</td><td>DR03769</td><td>PV-Admissions Asi...</td><td>Gift Agreement</td><td>20160916</td><td>21475</td><td>ADV Finance</td><td>3</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>152341</td><td>ER02261</td><td>NR-Gloor Scholars...</td><td>Gift Agreement</td><td>20160810</td><td>21428</td><td>ADV Finance</td><td>2</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>151784</td><td>DR03721</td><td>BA-Royster-Lawto...</td><td>Gift Agreement</td><td>20160701</td><td>21418</td><td>ADV Finance</td><td>4</td><td></td><td>12/13/...</td><td></td></tr> <tr><td>152224</td><td>DR03723</td><td>FI-Emergency Assi...</td><td>Gift 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Finance</td><td>3</td><td></td><td>12/14/...</td><td></td></tr> <tr><td>153165</td><td>ER02270</td><td>FI-Musick Mem En...</td><td>Gift Agreement</td><td>20161116</td><td>21500</td><td>ADV Finance</td><td>4</td><td></td><td>12/14/...</td><td></td></tr> <tr><td>153525</td><td>ER02273</td><td>FI-BCS Sullivan an...</td><td>Gift Agreement</td><td>20170110</td><td>21539</td><td>ADV Finance</td><td>3</td><td></td><td>12/14/...</td><td>3/15/2018</td></tr> </tbody> </table>	Project	Award	EntityName	Type	Date-YYYYMMDD	Advance_ID	Drawer	Pages	Notes	Created	Last Viewed	154446	ER02297	WS-BCS Eliam Bice...	Gift Agreement	20170425		ADV Finance	3		12/14/...	3/13/2018	154446	ER02296	WS-BCS Green Bice...	Gift Agreement	20170425		ADV Finance	3		12/14/...	3/13/2018	154565	ER02299	WS-BCS Prior Bice...	Gift Agreement	20170511		ADV Finance	3		12/14/...	3/13/2018	153994	ER02285	WS-BCS Price/Schi...	Gift Agreement	20170223		ADV Finance	3		12/14/...	3/12/2018	154543	ER02298	WS-BCS Lee Bicen...	Gift Agreement	20170508		ADV Finance	3		12/14/...	3/13/2018	153993	ER02284	WS-BCS Street Bic...	Gift Agreement	20170223		ADV Finance	3		12/14/...	3/12/2018	152699	ER02263	FI-Griffin, John F. ...	Gift Agreement	20160920	21365	ADV Finance	2		12/13/...		152006	DR03708	FI-Alabama Oppor...	Gift Agreement	20160714	21401	ADV Finance	2		12/13/...		151788	ER02259	BA-Royster-Lawto...	Gift Agreement	20160729	21412	ADV Finance	4		12/13/...		152197	ER02258	FI-Hauptfuhrer Sch...	Gift Agreement	20160727	21410	ADV Finance	3		12/13/...		152211	DR03720	FI-Cavaller Advent...	Gift Agreement	20160728	21414	ADV Finance	2		12/13/...		151933	ER02257	FM-Ford Outstandi...	Gift Agreement	20160707	21396	ADV Finance	3		12/13/...		154634	ER02301	WS-BCS UVa-Wise...	Gift Agreement	20170522		ADV Finance	3		12/14/...	3/13/2018	153996	ER02286	WS-BCS Thomas F...	Gift Agreement	20170223		ADV Finance	3		12/14/...	3/12/2018	152570	ER02262	AS-DEAN Wilson E...	Gift Agreement	20160902	21464	ADV Finance	2		12/13/...		152756	DR03769	PV-Admissions Asi...	Gift Agreement	20160916	21475	ADV Finance	3		12/13/...		152341	ER02261	NR-Gloor Scholars...	Gift Agreement	20160810	21428	ADV Finance	2		12/13/...		151784	DR03721	BA-Royster-Lawto...	Gift Agreement	20160701	21418	ADV Finance	4		12/13/...		152224	DR03723	FI-Emergency Assi...	Gift Agreement	20160801	21416	ADV Finance	3		12/13/...		151786	DR03722	BA-Royster-Lawto...	Gift Agreement	20160701	21415	ADV Finance	4		12/13/...		152409	DR03749	PV-Dee Family Exp...	Gift Agreement	20160701	21449	ADV Finance	7		12/13/...		153116	DR03784	FI-Musick Mem Sc...	Gift Agreement	20160701	21501	ADV Finance	4		12/14/...		152910	ER02269	MD-INMD-CV Tan...	Gift Agreement	20161014	21490	ADV Finance	3		12/14/...		153459	ER02272	PV-Angle Exhibitio...	Gift Agreement	20161228	21534	ADV Finance	3		12/14/...		153165	ER02270	FI-Musick Mem En...	Gift Agreement	20161116	21500	ADV Finance	4		12/14/...		153525	ER02273	FI-BCS Sullivan an...	Gift Agreement	20170110	21539	ADV Finance	3		12/14/...	3/15/2018
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Gift & Endowment ImageNow – User Reference Guide

Viewing Documents

ImageNow provides a number of useful options to meet user viewing needs. The demo below will pick up after a single condition search has been executed and show how to open informational viewing panes and utilize other navigational and viewing features (i.e., rotate, zoom, etc.).

Step	Action																																								
1.	<p>Once a search has been executed, double-click on the desired content.</p>  <table border="1"> <thead> <tr> <th>Project</th> <th>Award</th> <th>EntityName</th> <th>Type</th> <th>Date-YYYYMMDD</th> <th>Advance_ID</th> <th>Drawer</th> <th>Pages</th> </tr> </thead> <tbody> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Transactions</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>69</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Gift Agreement</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>21</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Project Create</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>25</td> </tr> <tr> <td>100138</td> <td>ER00378</td> <td>LW-Prfs-U-Miller L...</td> <td>Correspondence</td> <td>20010525</td> <td></td> <td>ADV Finance</td> <td>1</td> </tr> </tbody> </table>	Project	Award	EntityName	Type	Date-YYYYMMDD	Advance_ID	Drawer	Pages	100138	ER00378	LW-Prfs-U-Miller L...	Transactions	20010525		ADV Finance	69	100138	ER00378	LW-Prfs-U-Miller L...	Gift Agreement	20010525		ADV Finance	21	100138	ER00378	LW-Prfs-U-Miller L...	Project Create	20010525		ADV Finance	25	100138	ER00378	LW-Prfs-U-Miller L...	Correspondence	20010525		ADV Finance	1
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2.	<p>The Viewer screen opens displaying the first page in the document. The number of pages in a document displays in the lower right corner of the screen.</p> 