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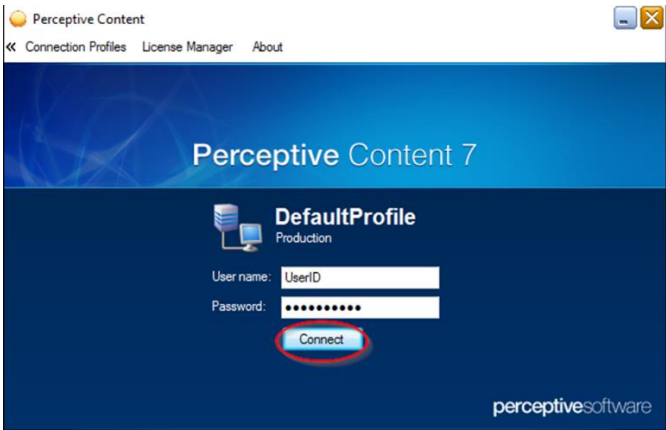
As noted above, users will be granted access only to documents relating to the gifts and endowments held by their MBU. Users will not have access to documentation relating to gifts and endowments held by other University business units.
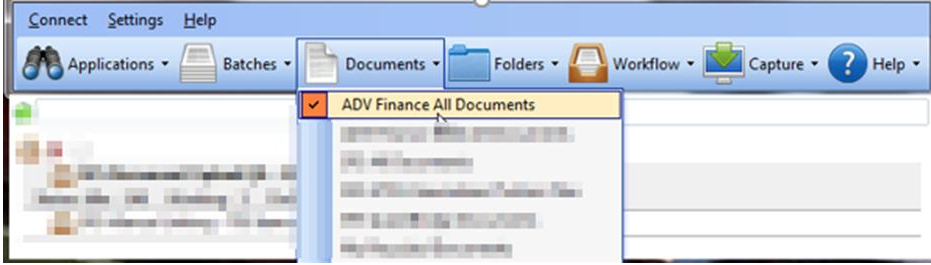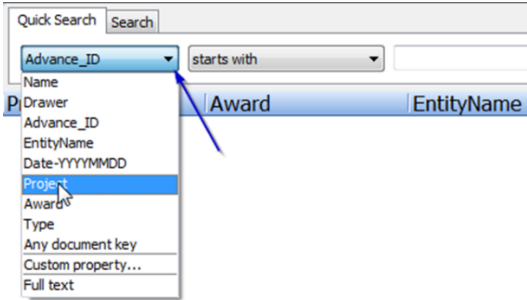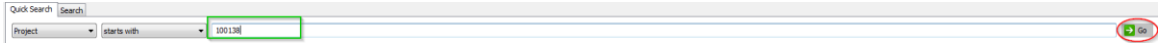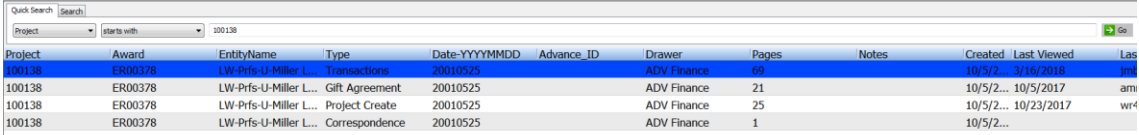
Searchable Fields

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
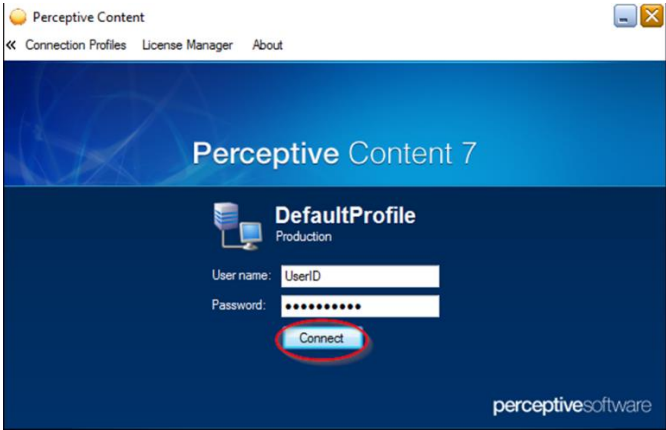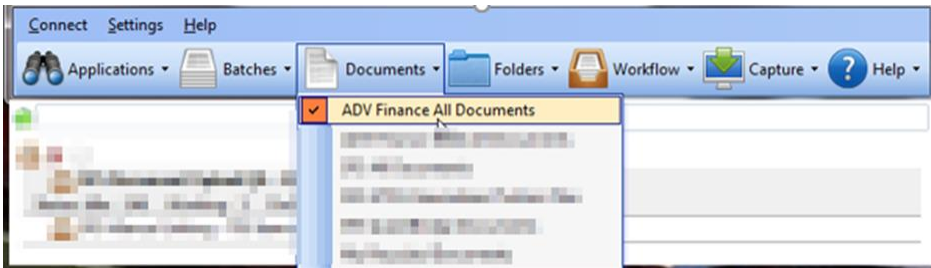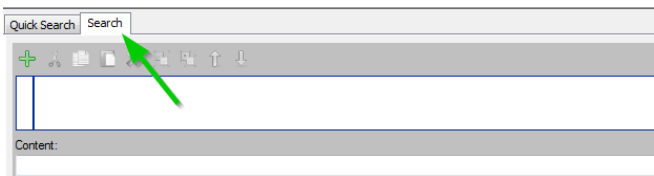
Single Condition Searches:

Step	Action
1.	Open and Sign-in to ImageNow.
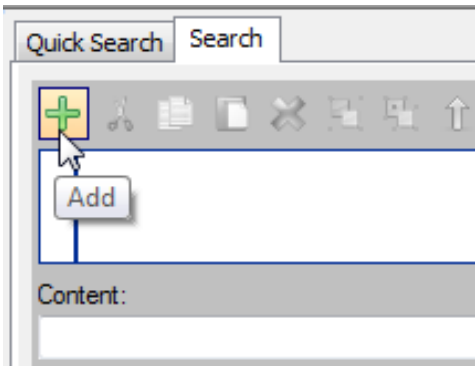
Step	Action
2.	Select the "Documents" dropdown and choose the appropriate set of ADV Finance documents.
3.	Determine which "Searchable Field" to use for your query (i.e., Advance ID, EntityName, Date, Project, Award, Type).
4.	Enter the corresponding criteria based on the field chosen and click "Go" or press "Enter" on your keyboard.
5.	All content meeting the specified criteria is returned.
6.	**End Procedure.**

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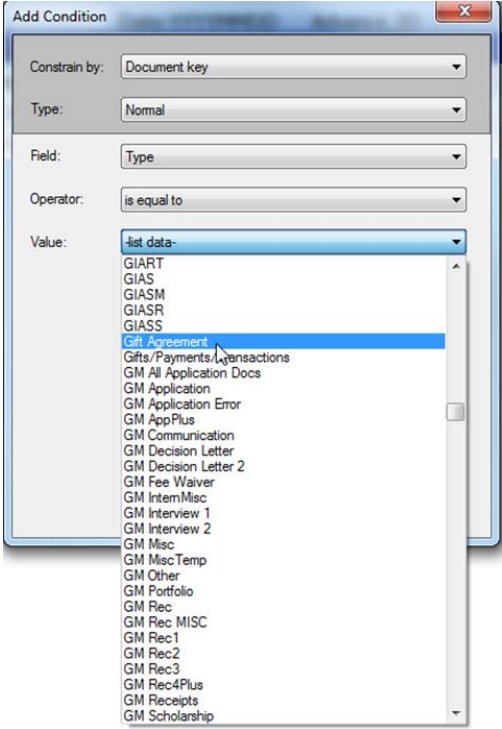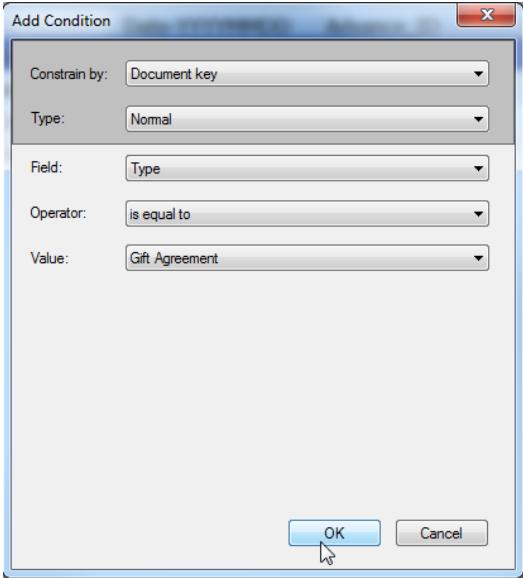
For this exhibit, let's search for all Gift Agreements with an FY17 start date.

Step	Action
1.	Open and Sign-in to ImageNow.
2.	Select the "Documents" dropdown and choose the appropriate set of ADV Finance documents.
3.	Change from the "Quick Search" tab to the "Search" tab.
4.	Click on the Green + symbol to specify your search conditions.
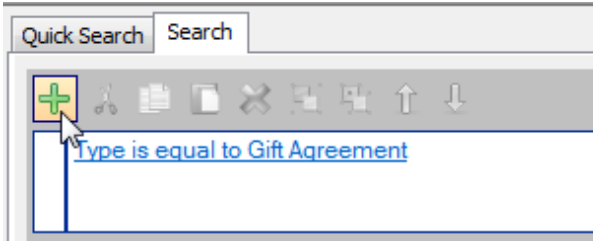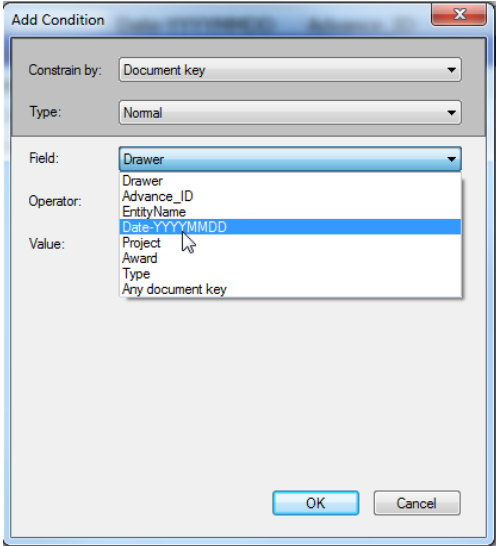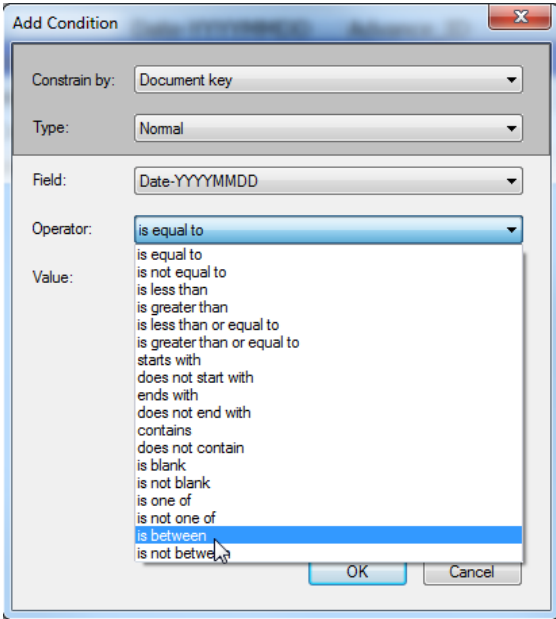
Step	Action
5.	Choose an item from the "Add Condition" dialogue box related to how you would like to limit your search. In most instances you will want to leave "Constrain by" set to "Document key" as this will allow for searching by the different fields that have been tailored for the system.
6.	Select the "Field" dropdown to choose the appropriate "Document Key." For our purposes, we will select "Type."
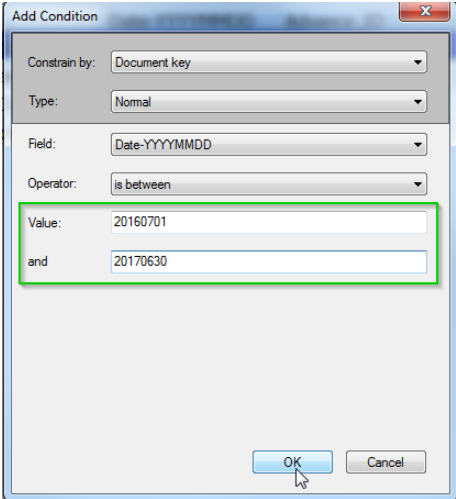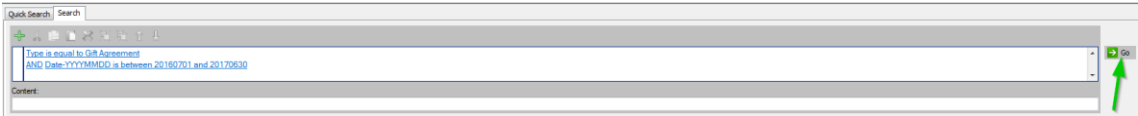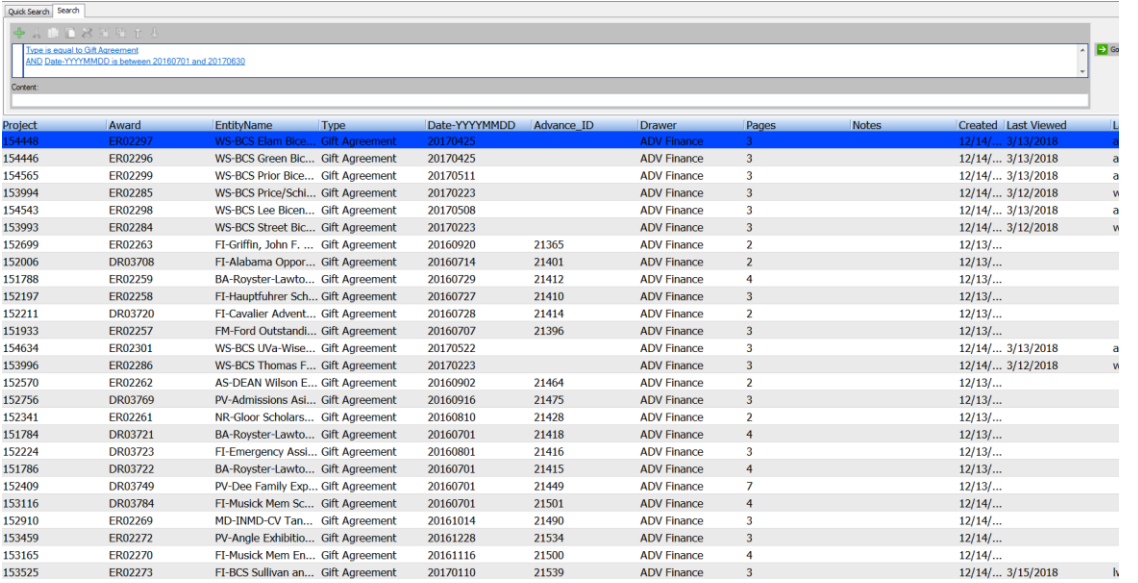
Step	Action
7.	Change the "Value" to the desired "Type." Note: All existing ImageNow values are returned in the dropdown. Be sure to scroll through to find the appropriate value related to the Gift & Endowment ImageNow system.
8.	Once selected, click "OK."

Step	Action
9.	Click the Green + button to add another condition. (Note the previous search criteria shows correctly.)
10.	Change the "Field" dropdown to the desired document key. For our purposes, "Date-YYYYMMDD" should be selected.
11.	Select the appropriate "Operator." For our purposes, "is between" should be selected.
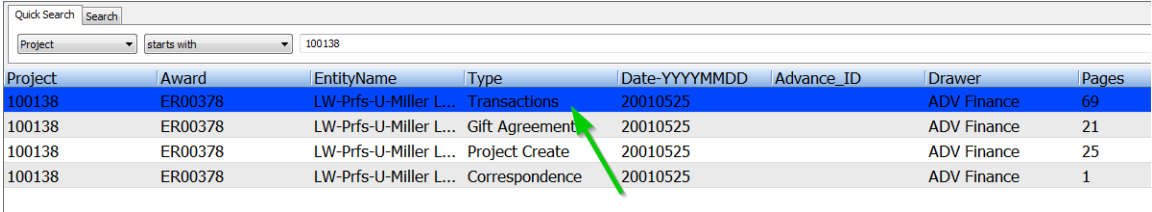
Step	Action
12.	Notice the option to enter two criteria appears. Enter the date range and then click "OK."
13.	Ensure both conditions are entered correctly in the search box and click "Go."
14.	All Gift Agreements for Project/Awards with an FY17 start date are returned.
15.	**End Procedure.**

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.	Once a search has been executed, double-click on the desired content.
2.	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.