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System Overview

The Gift & Endowment ImageNow system through Perceptive Content is a document repository that provides schools and units access to documentation related to their gift and endowment accounts that were previously only accessible through central UVAFinance.

Gaining Access

Users seeking access to the Gift & Endowment ImageNow system must sign a non-disclosure agreement, submit an security role request, and have the ImageNow software installed on their computer. An overview of the steps necessary to gain access to ImageNow is provided below.

Non-Disclosure Agreement

Non-Disclosure Agreement: Each user of the Gift & Endowment ImageNow system is required to sign a non-disclosure agreement prior to submitting a security request for access. Signed agreements must be sent to UVAFinance via AskFinance prior to the security role request being approved. The non-disclosure agreement can be physically signed and scanned to be sent to AskFinance or Please access the non-disclosure agreement [here](#).

Note: The non-disclosure agreement can be physically signed and scanned or signed electronically by each individual necessary for completion. To sign electronically within Adobe, please have both individuals use the Fill and Sign tool.

ESHARP Request

Security Role Request: After sending the signed non-disclosure agreement to UVAFinance, users must submit a Document Imaging System (ImageNow) security role request within Workday. Department security role requests will be forwarded by UVA Finance to the appropriate Dean's Office for approval.

Security Role Request Process:

1. Log in to Workday
2. Under the menu select 'System Access Requests'

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3. On the System Access Request Dashboard, select 'Document Imaging Access Requests' under the System Access Requests header
4. Click 'Create New Request'
5. Select the employee name and select 'Add' under the question regarding the type of action needed
6. Press Ok
7. On the next screen, enter 'Advancement Finance' under the column for Specific Module Requested
8. In the Sub- Module column, enter 'Advancement Finance'
9. In the Role column, enter the selection that includes the specific business unit for which you are requesting access. The selection will look like ADV_FINANCE_BU_VIEWER, where BU will be replaced by your specific business unit prefix (Ex. AS for the College and Graduate School of Arts & Sciences)

Note: Security role responsibilities for the system are broken down by business unit prefix and users in units are administrative offices should only request access to ONE related BU prefix. The 'ADV_FINANCE_ALL_VIEWER' responsibility is only available to central UVA Finance and University Advance staff

10. Add a comment explaining the individual's need to access the system
11. Submit the request for approval routing

LSP ImageNow Software Installation

LSP ImageNow Software Installation: Once the security role request has been fully approved, users should contact their Local Support Partner (LSP) to have the Perceptive Content software installed on their computer. The Perceptive Content Client software and additional information related to the installation of the software can be found on the [Document Imaging System](#) website.

Note: It will take 24 hours for the necessary VPN filter to be applied to the individual's VPN account. If you are still not able to access the system after this 24 hour window, please reach out to your LSP for assistance.

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

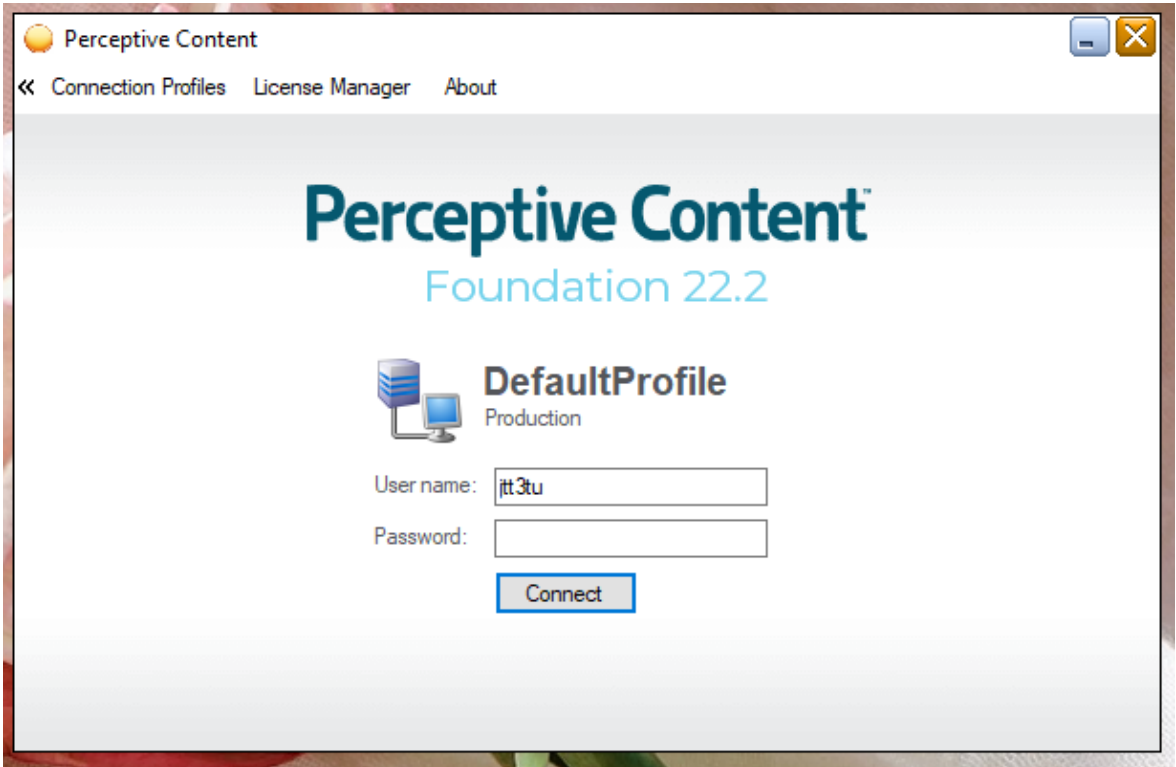
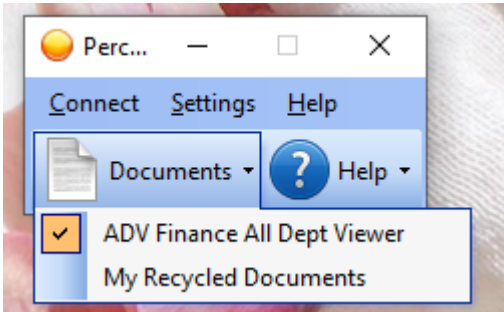
The searchable fields below are also known as the "Document Keys":

- Advance_ID = Development/Gift Accounting Reference Number
- Name = Workday Gift Name
- Workday Gift Name = Gift Worktag Name

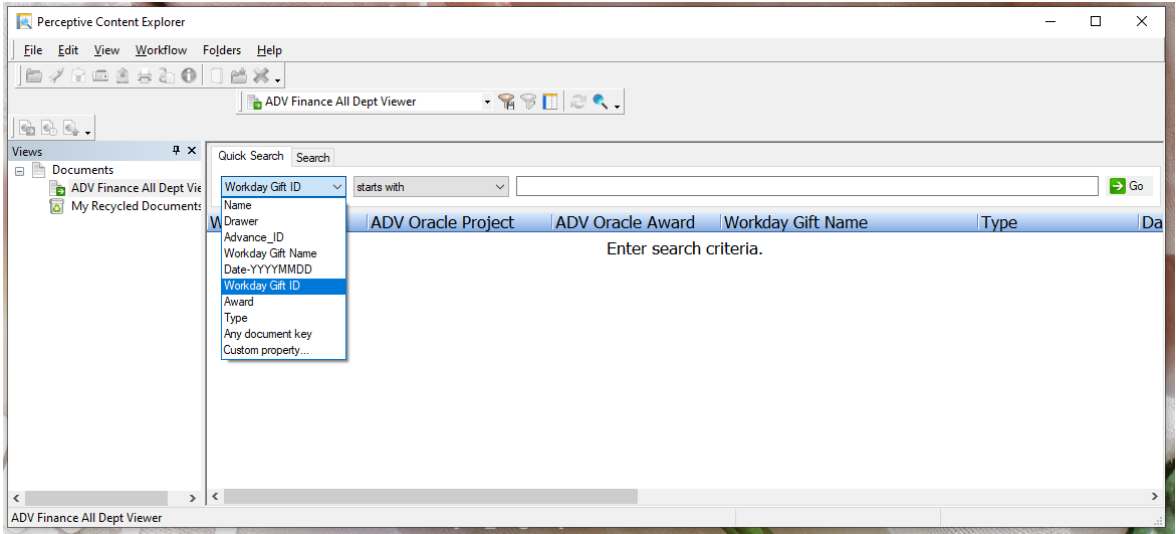
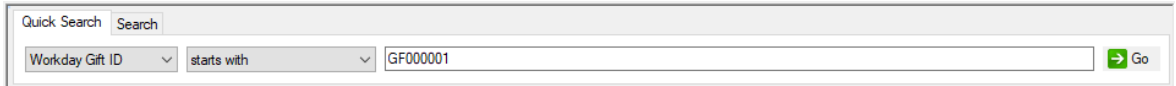
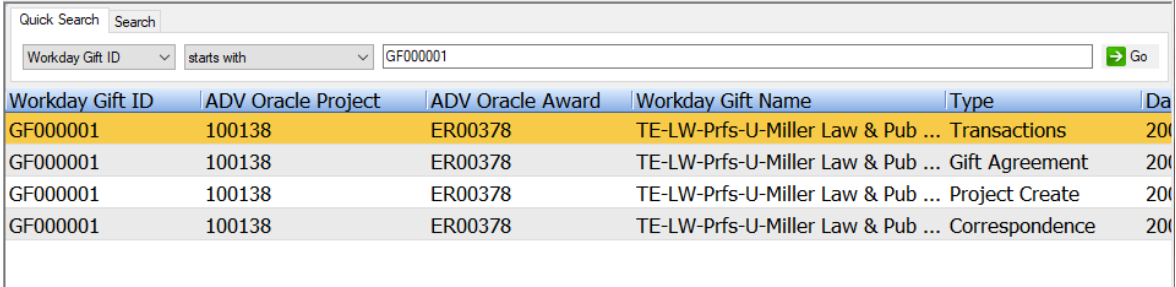
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- Date-YYYYMMDD = Award Active Start Date
- Award = Oracle Award Number
- Type = Document Category:
 - Gift Agreement = document utilized by University Advancement and signed by the donor in securing a gift/endowment
 - Project Create = information/documentation 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> 
2.	<p>Select the “Documents” dropdown and choose the appropriate set of ADV Finance documents.</p> 

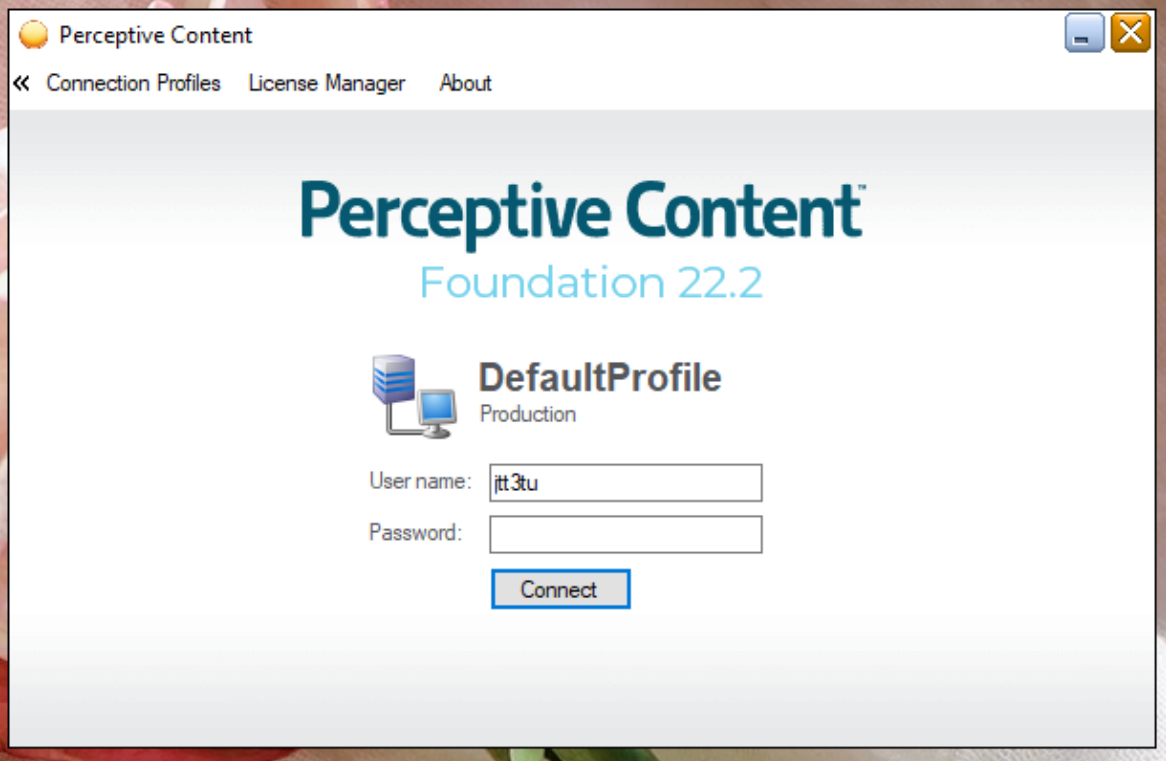
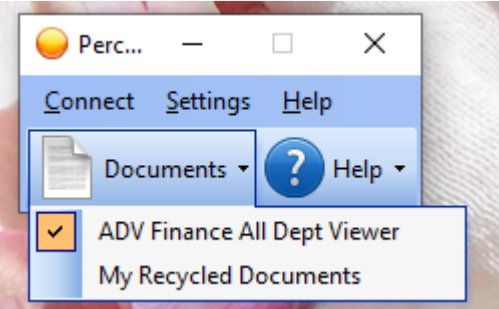
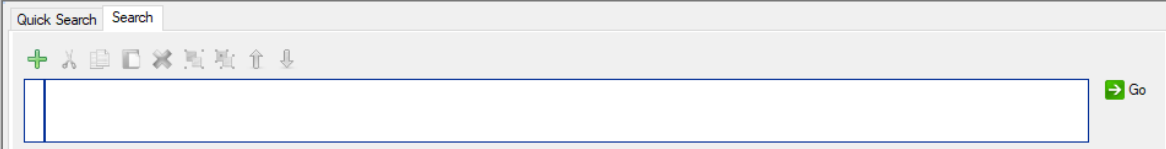
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Step	Action																														
3.	<p>Determine which “Searchable Field” to use for your query (i.e., Advance ID, EntityName, Date, Project, Award, Type).</p> 																														
4.	<p>Enter the corresponding criteria based on 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;"> <thead> <tr style="background-color: #e1eef6;"> <th>Workday Gift ID</th> <th>ADV Oracle Project</th> <th>ADV Oracle Award</th> <th>Workday Gift Name</th> <th>Type</th> <th>Da</th> </tr> </thead> <tbody> <tr style="background-color: #fff2cc;"> <td>GF000001</td> <td>100138</td> <td>ER00378</td> <td>TE-LW-Prfs-U-Miller Law & Pub ...</td> <td>Transactions</td> <td>200</td> </tr> <tr> <td>GF000001</td> <td>100138</td> <td>ER00378</td> <td>TE-LW-Prfs-U-Miller Law & Pub ...</td> <td>Gift Agreement</td> <td>200</td> </tr> <tr> <td>GF000001</td> <td>100138</td> <td>ER00378</td> <td>TE-LW-Prfs-U-Miller Law & Pub ...</td> <td>Project Create</td> <td>200</td> </tr> <tr> <td>GF000001</td> <td>100138</td> <td>ER00378</td> <td>TE-LW-Prfs-U-Miller Law & Pub ...</td> <td>Correspondence</td> <td>200</td> </tr> </tbody> </table>	Workday Gift ID	ADV Oracle Project	ADV Oracle Award	Workday Gift Name	Type	Da	GF000001	100138	ER00378	TE-LW-Prfs-U-Miller Law & Pub ...	Transactions	200	GF000001	100138	ER00378	TE-LW-Prfs-U-Miller Law & Pub ...	Gift Agreement	200	GF000001	100138	ER00378	TE-LW-Prfs-U-Miller Law & Pub ...	Project Create	200	GF000001	100138	ER00378	TE-LW-Prfs-U-Miller Law & Pub ...	Correspondence	200
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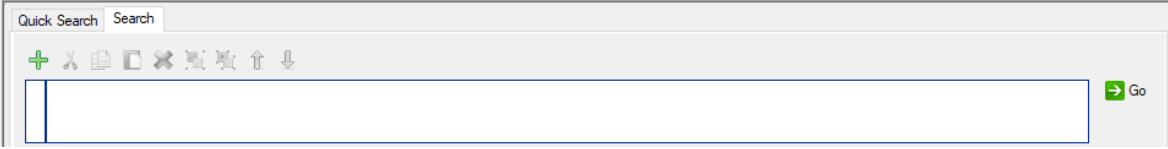
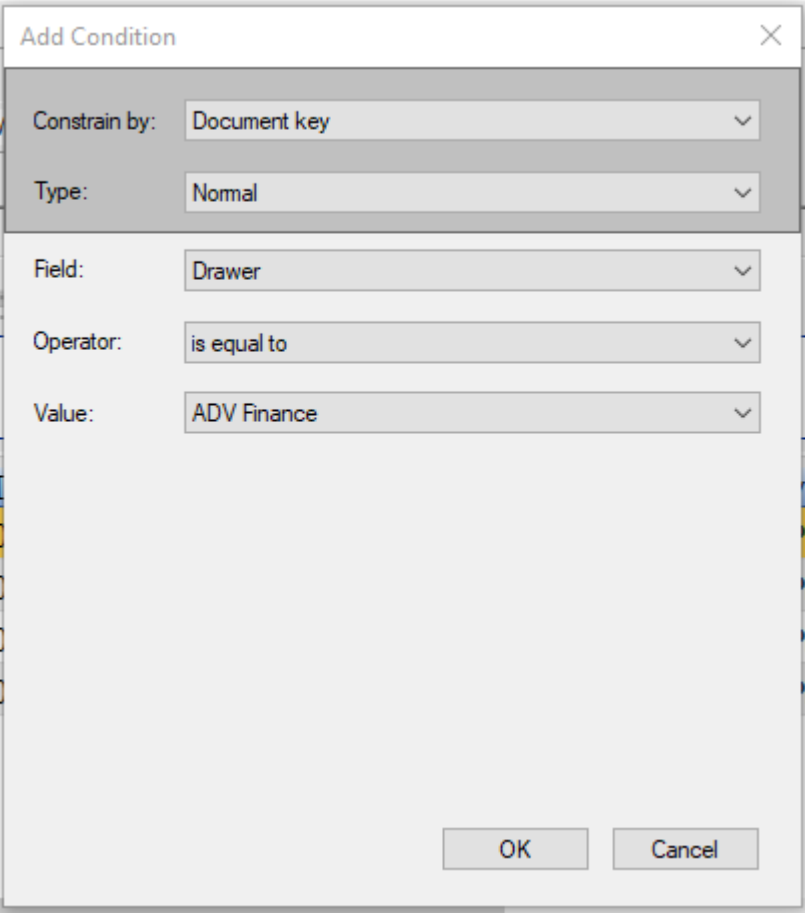
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Multiple Condition Searches:

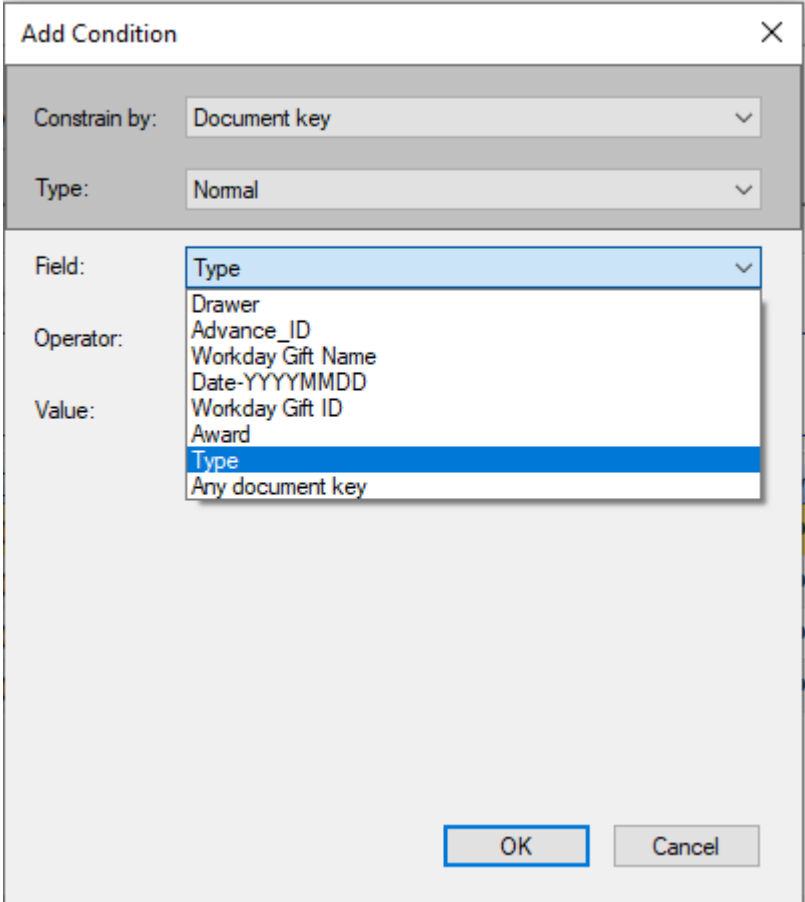
For this exhibit, let's search for all Gift Agreements with an FY17 start date.

Step	Action
1.	<p>Open and Sign-in to ImageNow.</p> 
2.	<p>Select the “Documents” dropdown and choose the appropriate set of ADV Finance documents.</p> 
3.	<p>Change from the “Quick Search” tab to the “Search” tab.</p> 

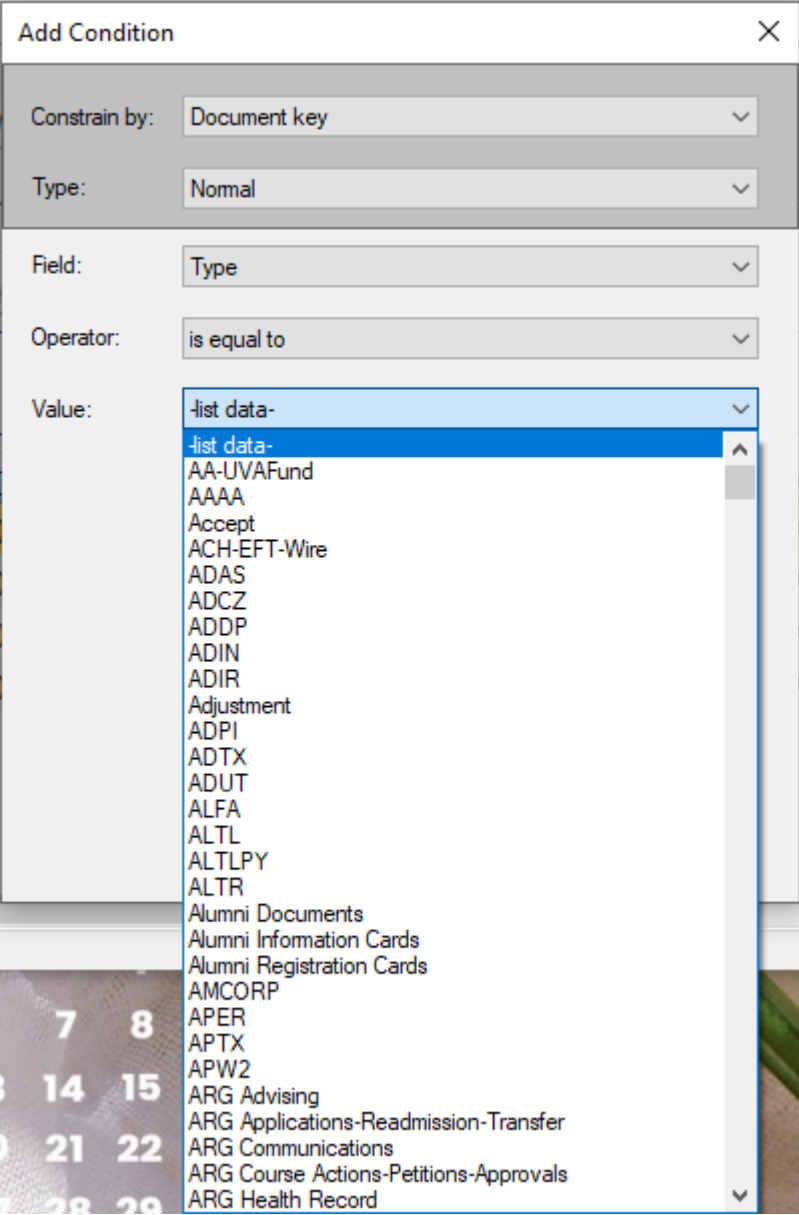
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Step	Action
4.	<p>Click on the Green + symbol to specify your search conditions.</p>  <p>The screenshot shows a search interface with a 'Quick Search' tab and a 'Search' input field. A green plus icon is visible on the left side of the search bar, and a 'Go' button is on the right.</p>
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>  <p>The screenshot shows the 'Add Condition' dialog box. It contains the following fields:</p> <ul style="list-style-type: none">Constrain by: Document keyType: NormalField: DrawerOperator: is equal toValue: ADV Finance <p>Buttons for 'OK' and 'Cancel' are located at the bottom of the dialog.</p>

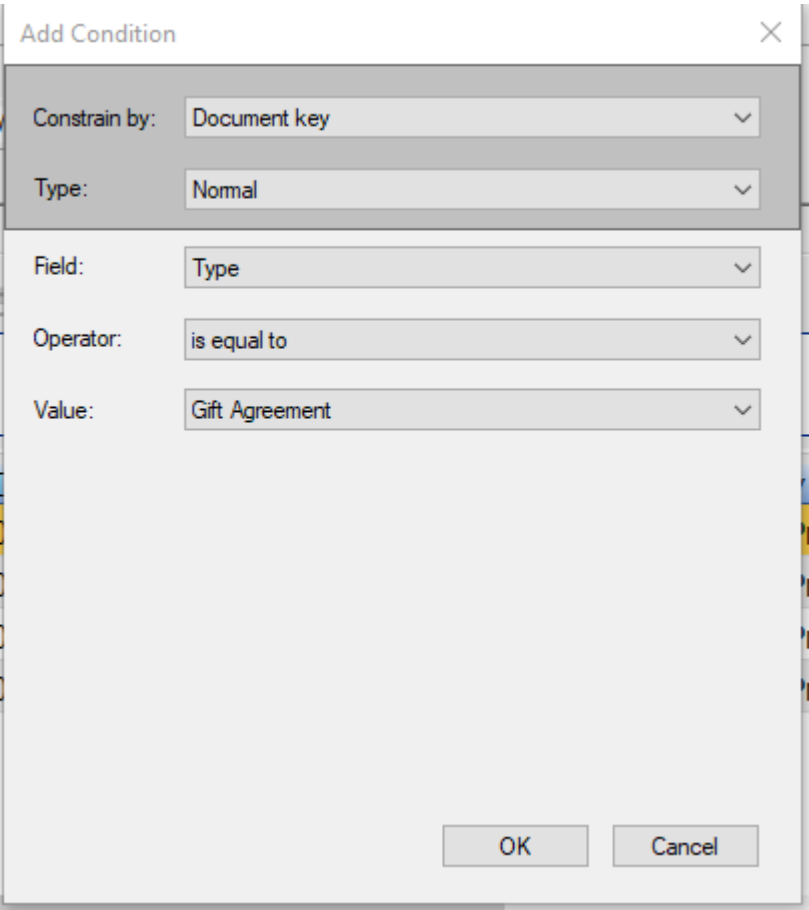
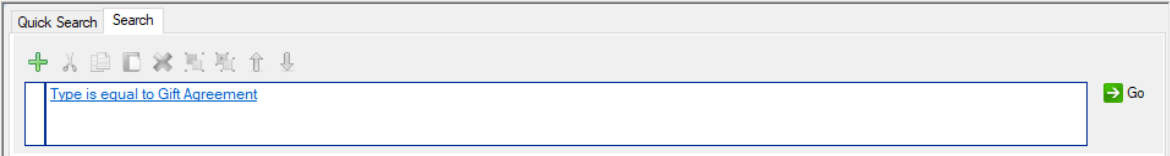
Gift & Endowment ImageNow – User Reference Guide

Step	Action
6.	<p>Select the “Field” dropdown to choose the appropriate “Document Key.” For our purposes, we will select “Type.”</p>  <p>The screenshot shows a dialog box titled "Add Condition" with a close button (X) in the top right corner. It contains several fields and a dropdown menu:</p> <ul style="list-style-type: none">Constrain by: A dropdown menu currently showing "Document key".Type: A dropdown menu currently showing "Normal".Field: A dropdown menu that is open, displaying a list of options: "Drawer", "Advance_ID", "Workday Gift Name", "Date-YYYYMMDD", "Workday Gift ID", "Award", "Type" (which is highlighted in blue), and "Any document key".Operator: An empty text field.Value: An empty text field.Buttons: "OK" and "Cancel" buttons are located at the bottom of the dialog box.

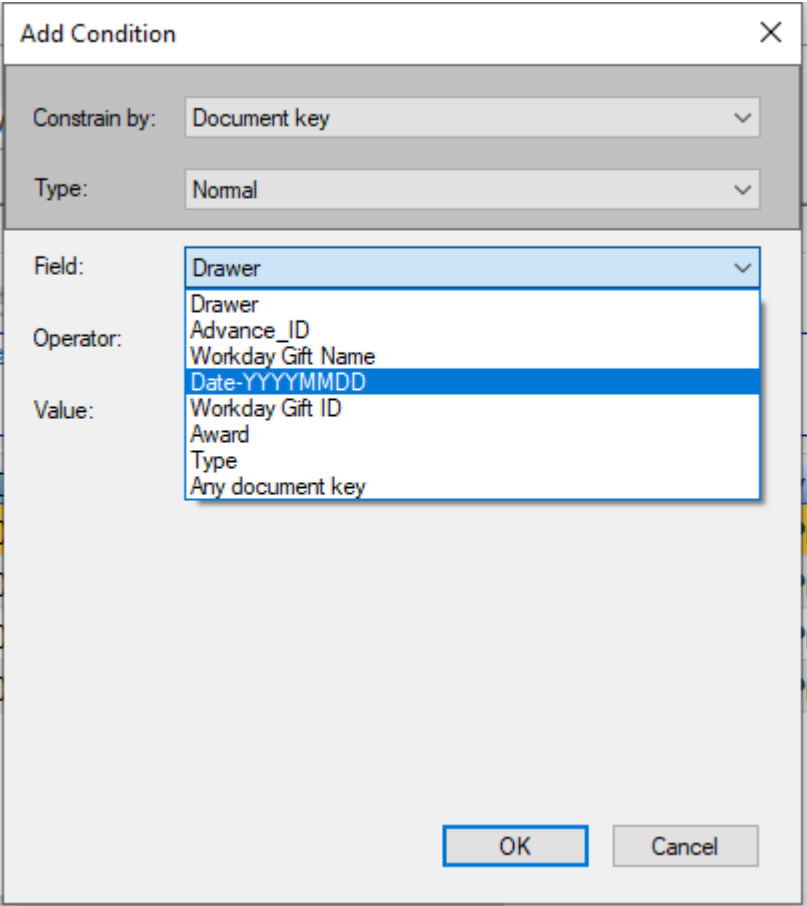
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Step	Action
7.	<p>Change the “Value” to the desired “Type.”</p> <p>Note: All existing ImageNow values are returned in the dropdown. Be sure to scroll through to find the appropriate value related to the Gift & Endowment ImageNow system.</p> 

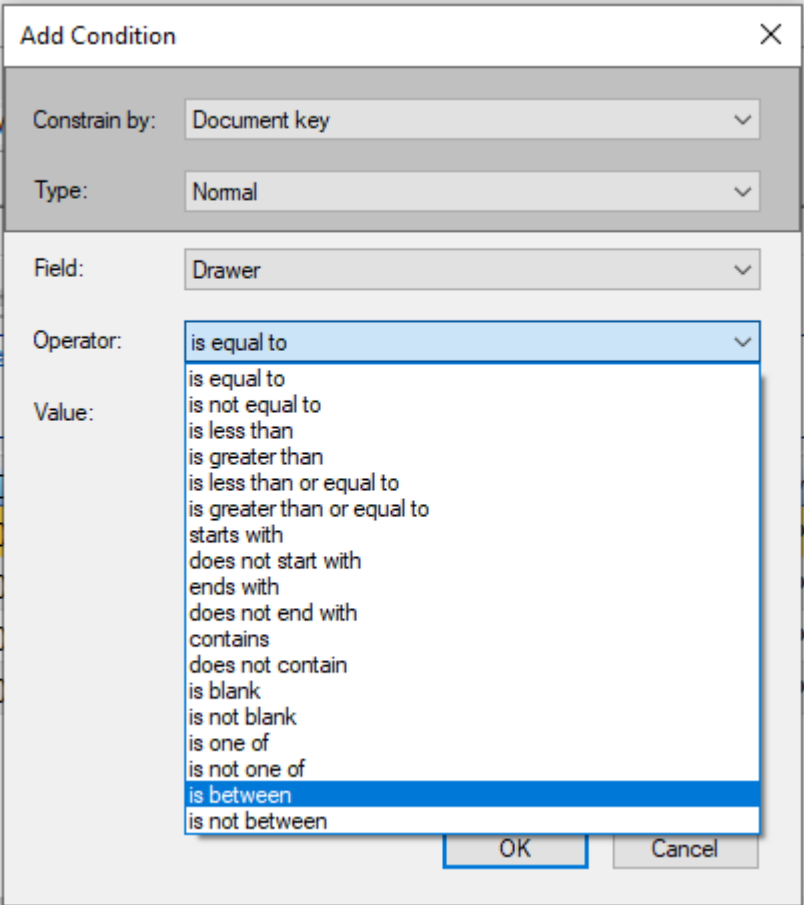
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Step	Action
8.	<p>Once selected, click “OK.”</p> 
9.	<p>Click the Green + button to add another condition. (Note the previous search criteria shows correctly.)</p> 

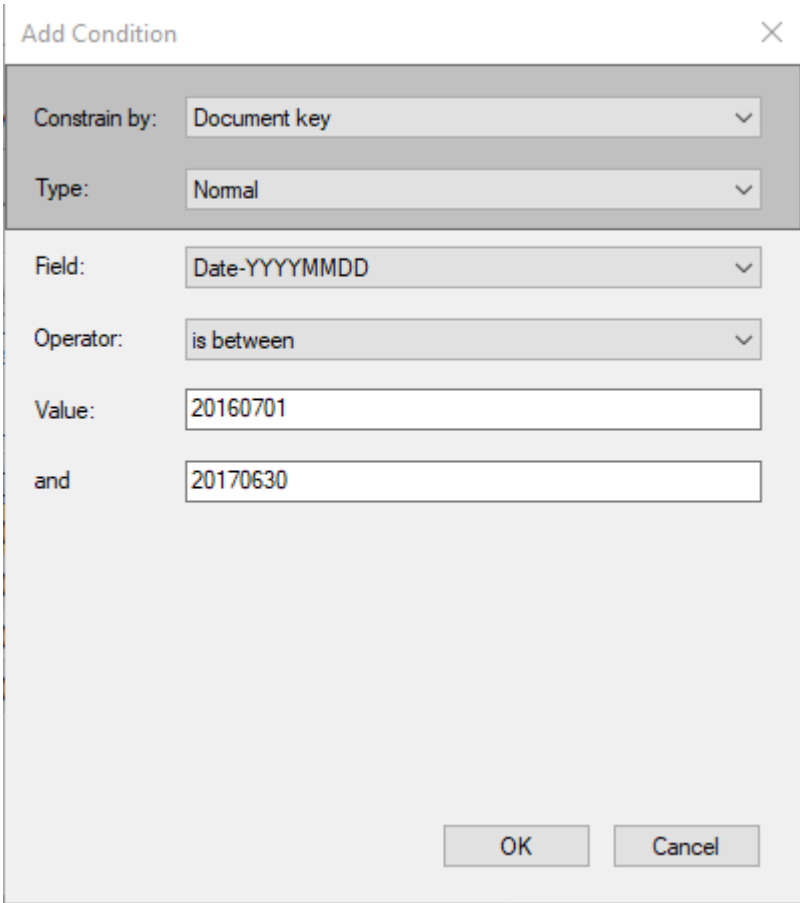
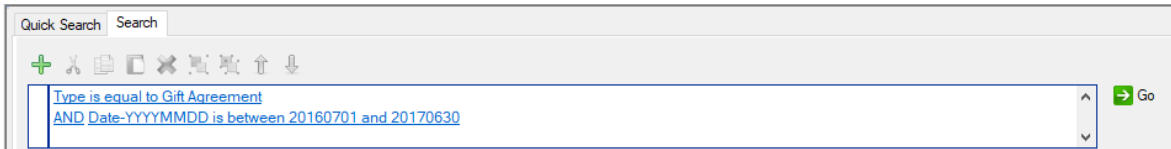
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Step	Action
10.	<p>Change the “Field” dropdown to the desired document key. For our purposes, “Date-YYYYMMDD” should be selected.</p>  <p>The screenshot shows a dialog box titled "Add Condition" with a close button (X) in the top right corner. The dialog contains several fields and dropdown menus:</p> <ul style="list-style-type: none">Constrain by: A dropdown menu currently showing "Document key".Type: A dropdown menu currently showing "Normal".Field: A dropdown menu that is open, displaying a list of options: "Drawer", "Advance_ID", "Workday Gift Name", "Date-YYYYMMDD" (highlighted in blue), "Workday Gift ID", "Award", "Type", and "Any document key".Operator: An empty text field.Value: An empty text field.Buttons: "OK" and "Cancel" buttons are located at the bottom of the dialog.

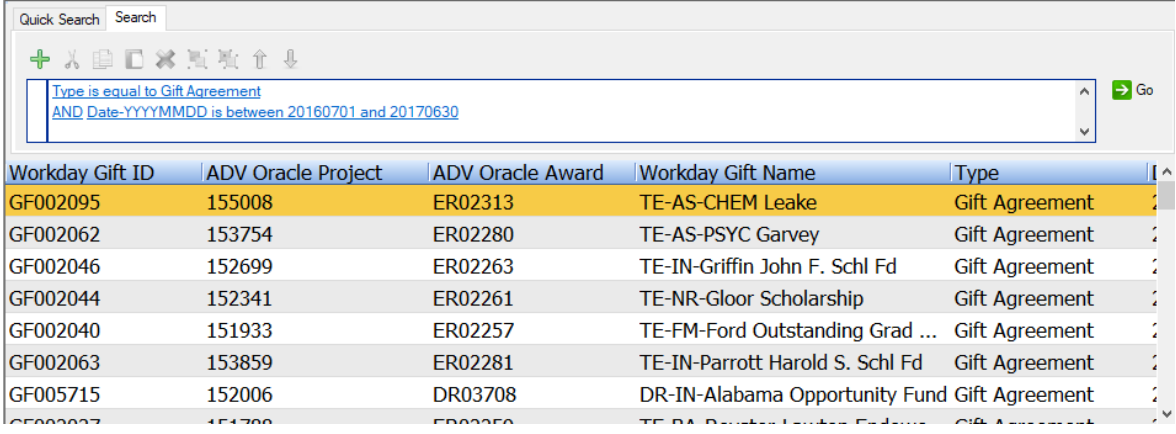
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Step	Action
11.	<p>Select the appropriate “Operator.” For our purposes, “is between” should be selected.</p>  <p>The screenshot shows a dialog box titled "Add Condition" with a close button (X) in the top right corner. The dialog contains several fields and a dropdown menu:</p> <ul style="list-style-type: none">Constrain by: Document key (dropdown)Type: Normal (dropdown)Field: Drawer (dropdown)Operator: is equal to (dropdown menu is open, showing a list of operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, starts with, does not start with, ends with, does not end with, contains, does not contain, is blank, is not blank, is one of, is not one of, is between, is not between). The "is between" option is highlighted in blue.Value: (empty text field)Buttons: OK and Cancel at the bottom right.

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Step	Action
12.	<p data-bbox="310 226 1409 262">Notice the option to enter two criteria appears. Enter the date range and then click “OK.”</p> 
13.	<p data-bbox="310 1207 1268 1243">Ensure both conditions are entered correctly in the search box and click “Go.”</p> 

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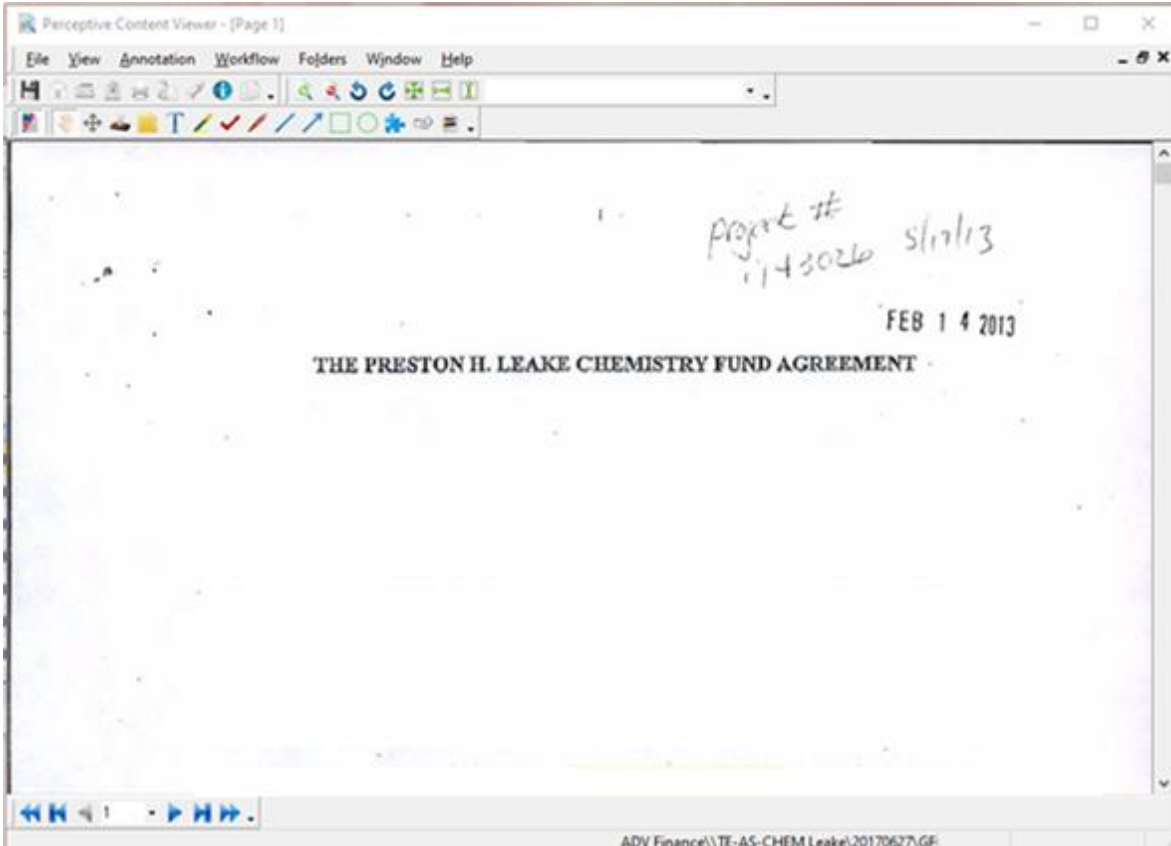
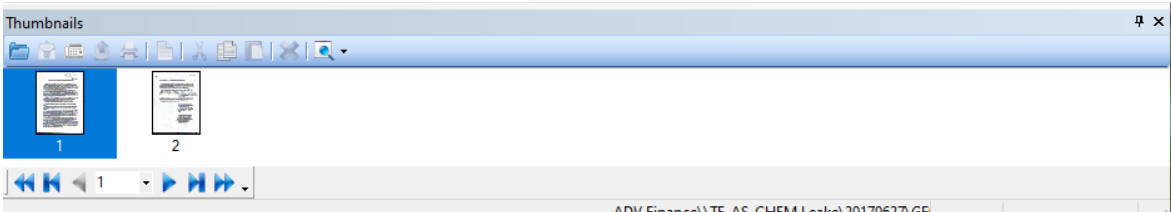
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Viewing Documents

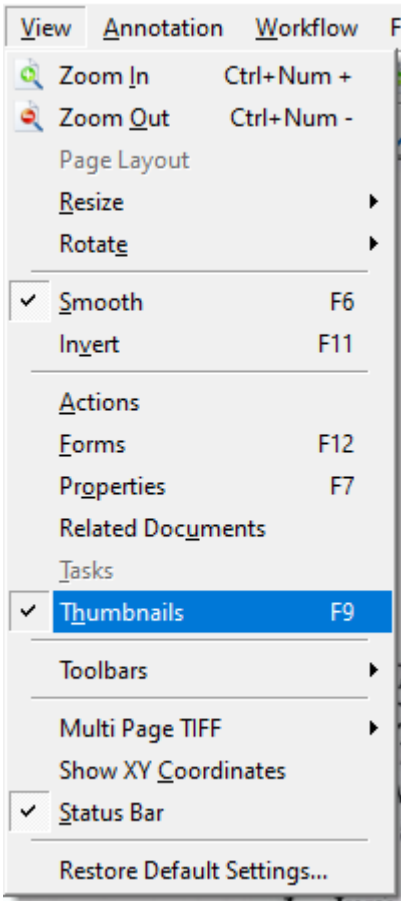
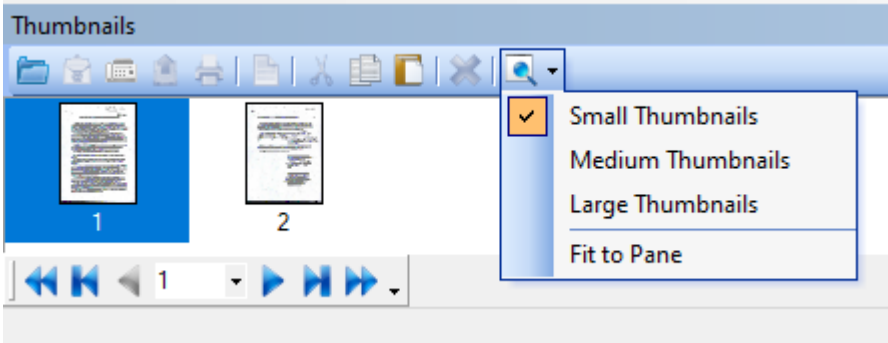
ImageNow provides a number of useful options to meet user viewing needs. The demo below will pick up after a single condition search has been executed and show how to open informational viewing panes and utilize other navigational and viewing features (i.e., rotate, zoom, etc.).

Step	Action
1.	Once a search has been executed, double-click on the desired content.

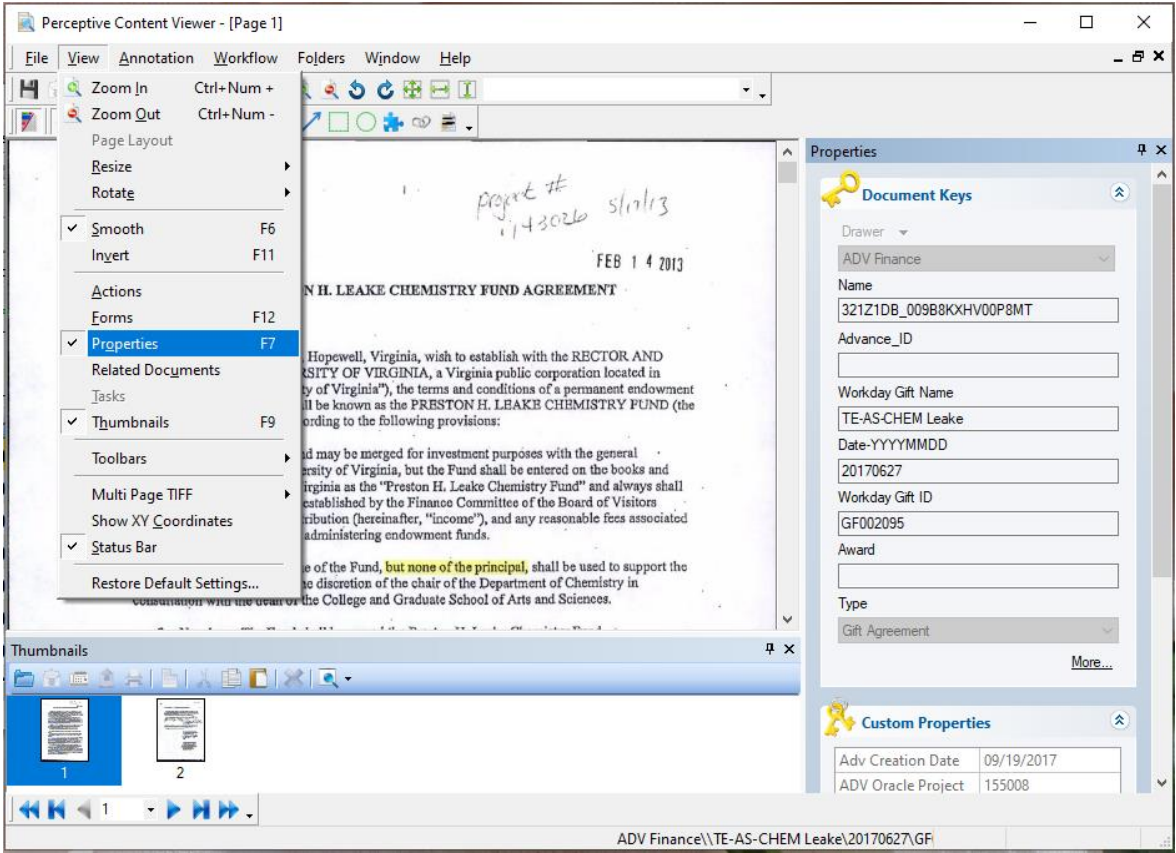


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Step	Action
2.	<p>The Viewer screen opens displaying the first page in the document. The number of pages in a document displays in the lower right corner of the screen.</p> 
3.	<p>Use the arrows at the bottom of the page to navigate to the next or previous page OR the next or previous document.</p>  <p>Note:</p> <ul style="list-style-type: none">• The single arrow icon to the right will display the next page• The single arrow icon to the left will display the previous page• The right arrow with solid bar navigates to the last page in the document• The right double arrows navigates to the next document in the ImageNow Explorer• The left arrow with solid bar navigates to the first page in the document• The left double arrow navigates to the previous document in ImageNow Explorer <p>You may also double-click on any thumbnail page to open that page in the Viewer.</p>

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Step	Action
4.	<p>If Thumbnails do not display the first time you open the ImageNow viewer, select the “View” menu in the toolbar and the select “Thumbnails.”</p>  <p>Note: F9 on your keyboard is a shortcut to enabling the Thumbnails window pane.</p>
5.	<p>The magnifying glass icon dropdown arrow provides options for viewing thumbnails in different sizes.</p> 

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Step	Action
6.	<p>On the ImageNow Viewer screen, click “View” in the menu to open or close the Properties (this window shows Document Keys and Custom Properties).</p>  <p>Note: F7 on your keyboard is a shortcut to enabling the Properties window pane.</p>
7.	<p>The “Zoom In” or “Zoom Out” options on the View menu (or the magnifying glass icons) may enhance your viewing.</p> 
8.	<p>If a document was imported incorrectly, the rotation icons on the Viewer toolbar may be used to reorient the page.</p> 
9.	<p>End Demo.</p>