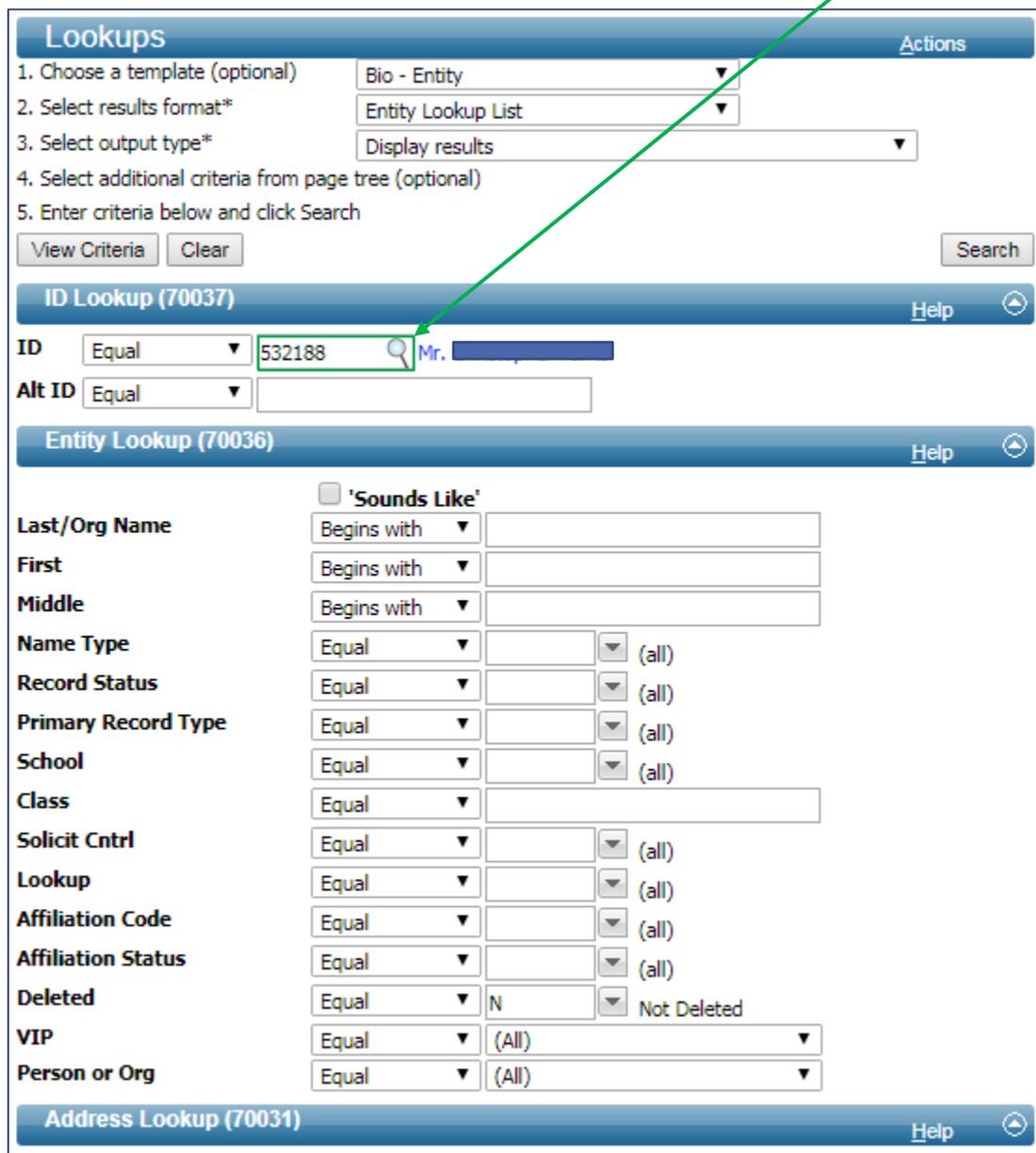


How To Find the Documents Attached to an Entity

Ver. 1.1

3/13/2019

1. Log in to Advance.
2. Use the **Lookup** tool  to find the entity in question. (See one of the multiple **How to - Lookup an Entity** help files on aits.uark.edu)
3. For this example, I am going directly to my record by using my **Entity ID**.



Lookups Actions

1. Choose a template (optional)

2. Select results format*

3. Select output type*

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

ID Lookup (70037) Help

ID

Alt ID

Entity Lookup (70036) Help

'Sounds Like'

Last/Org Name

First

Middle

Name Type

Record Status

Primary Record Type

School

Class

Solicit Cntrl

Lookup

Affiliation Code

Affiliation Status

Deleted

VIP

Person or Org

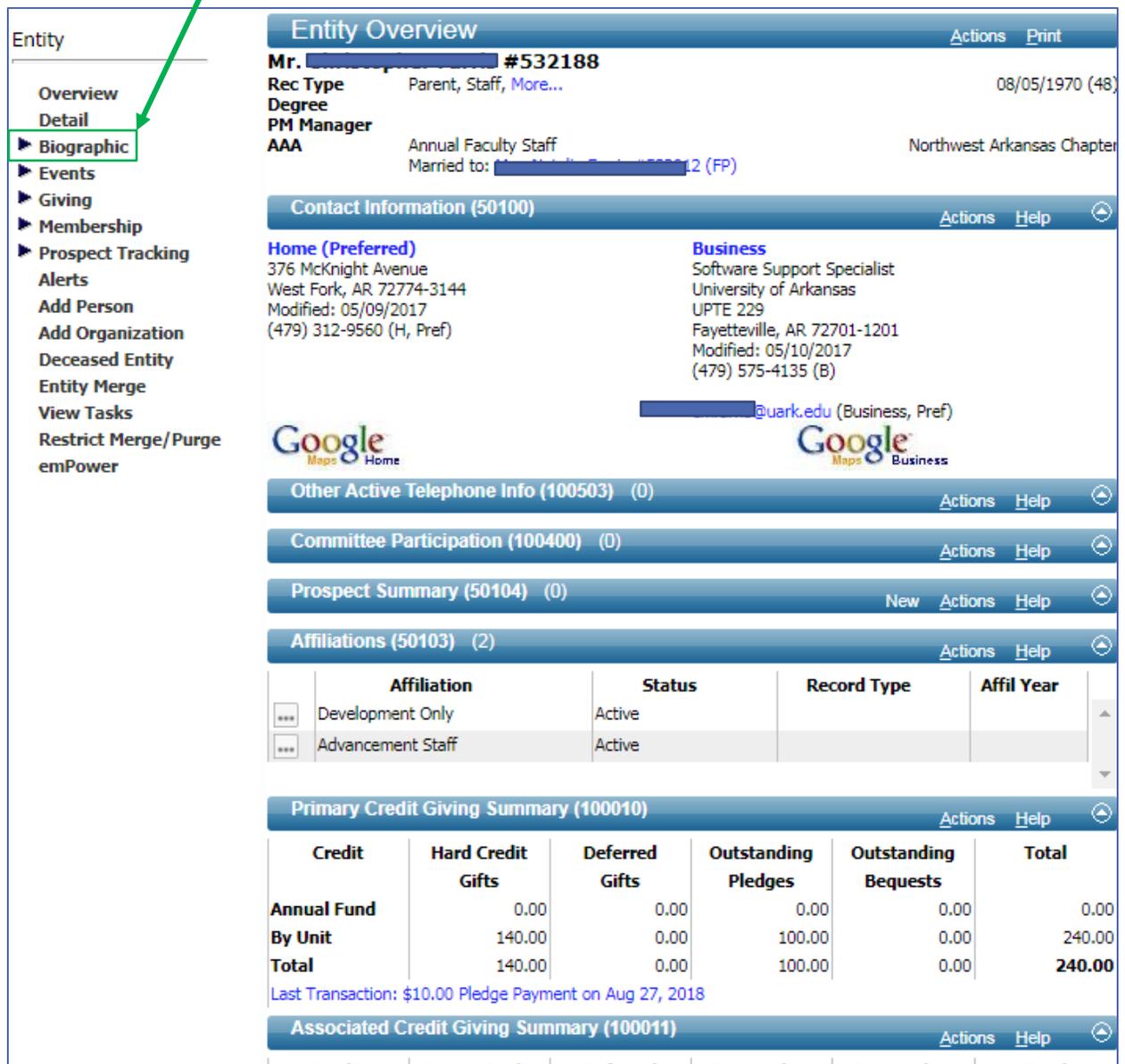
Address Lookup (70031) Help

How To Find the Documents Attached to an Entity

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4. Choose **Biographic** from the Nav Tree on the Entity Overview screen.



The screenshot shows the 'Entity Overview' page for a person. On the left is a navigation tree with 'Biographic' highlighted. The main content area shows personal details, contact information for home and business, and a table of affiliations.

Entity Overview Actions Print

Mr. [REDACTED] #532188
Rec Type: Parent, Staff, More... 08/05/1970 (48)
Degree
PM Manager
AAA: Annual Faculty Staff Northwest Arkansas Chapter
Married to: [REDACTED] 12 (FP)

Contact Information (50100) Actions Help ↕

Home (Preferred)
376 McKnight Avenue
West Fork, AR 72774-3144
Modified: 05/09/2017
(479) 312-9560 (H, Pref)

Business
Software Support Specialist
University of Arkansas
UPTe 229
Fayetteville, AR 72701-1201
Modified: 05/10/2017
(479) 575-4135 (B)

[REDACTED]@uark.edu (Business, Pref)

Other Active Telephone Info (100503) (0) Actions Help ↕

Committee Participation (100400) (0) Actions Help ↕

Prospect Summary (50104) (0) New Actions Help ↕

Affiliations (50103) (2) Actions Help ↕

| | Affiliation | Status | Record Type | Affil Year |
|-----|-------------------|--------|-------------|------------|
| ... | Development Only | Active | | |
| ... | Advancement Staff | Active | | |

Primary Credit Giving Summary (100010) Actions Help ↕

| Credit | Hard Credit Gifts | Deferred Gifts | Outstanding Pledges | Outstanding Bequests | Total |
|--------------|-------------------|----------------|---------------------|----------------------|---------------|
| Annual Fund | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| By Unit | 140.00 | 0.00 | 100.00 | 0.00 | 240.00 |
| Total | 140.00 | 0.00 | 100.00 | 0.00 | 240.00 |

Last Transaction: \$10.00 Pledge Payment on Aug 27, 2018

Associated Credit Giving Summary (100011) Actions Help ↕

How To Find the Documents Attached to an Entity

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5. Click **Documents** from the Nav Tree.

Entity

Bio Summary Actions Print

M **is #532188**

Rec Type Parent, Staff, More... 08/05/1970 (48)

Degree

PM Manager

AAA Annual Faculty Staff Northwest Arkansas Chapter

Married to: Mrs. ()

Biographic Detail (50110) Actions Help

| | | | |
|-----------------|------------|------------------|------------|
| Salutation | Mr. Farris | Status Chg Date | 08/26/2009 |
| Status | Active | Solicit Chg Date | |
| Solicit Ctrl | | | |
| Solicit Comment | | | |
| Gender | Male | | |
| Children | 2 | | |
| Source | ISIS Data | | |
| Added | 08/26/2009 | | |
| Bio Comment | | | |

Biographical Detail (Birth & Death) (80750) Actions Help

Birth Related Data

| | | | |
|-------------|------------|---------------|-----------|
| Birth Date | 08/05/1970 | Ethnicity | Caucasian |
| Birth Place | | Ethnic Src | |
| | | Religion | |
| | | Children | 2 |
| | | Citizenship | |
| | | Legacy | |
| | | Political Int | Yes |
| | | Language | |
| | | Research Date | |

Death Related Data

| | | | |
|-------------|--|--|--|
| Death Date | | | |
| Notified | | | |
| Confirmed | | | |
| Death Place | | | |
| Obituary | | | |
| Pub Date | | | |
| Letter 1 | | | |
| Letter 2 | | | |

App ID: 5021
Page ID: 50002
User: cmfarris
Database: ADVANCE
User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)
License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)
App(5021)(7): Security(On)
Profile 0 (Base) Form 60012 (EntityHeader) Security(Off) DataClump 100008 db 1
Profile 0 (Base) Form 50110 (Biographic Detail) Menu 50003 Security(Off) DataClump 50110 db 1
Profile 0 (Base) Form 80750 (Biographical Detail (Birth & Death) Inq Only) Menu 50005 Security(Off) DataClump 80373 d

NOTICE THAT THERE ARE 2 DOCS ATTACHED TO THIS RECORD.

How To Find the Documents Attached to an Entity

Ver. 1.1

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- The **Documents** page displays the documents that you have access to. Keep in mind that users have varying levels of permission to view documents. If a co-worker is capable of seeing files that you are not, it is because they have a higher permission level. If you have a legitimate reason to see those files, please request a permission change.

Documents Actions Print

Mr. C [REDACTED] s #532188

Rec Type Parent, Staff, [More...](#) 08/05/1970 (48)

Degree

PM Manager

AAA Annual Faculty Staff Northwest Arkansas Chapter

Married to: M [REDACTED] 012 (FP)

Documents List (80715) (2) Actions Help

| | View | Doc Type | Description | Doc Date |
|--|------|----------------------|---------------------------------|------------|
| | | NOS Scholarship A... | Farris, Christopher M:010847149 | 01/01/1871 |
| | | NOS Scholarship A... | Farris, Christopher M:010847149 | 01/01/1871 |
| | | | | |
| | | | | |
| | | | | |