OptiDoc/WebIT

WebIT is a web-based viewer for the OptiDoc imaging system. This component of the OptiDoc imaging system provides users with the ability to search for and view images stored on the system over the web using Microsoft Internet Explorer. The benefit of WebIT is that it allows a single user to log into and search multiple databases from anywhere via the web.

**Important Note:** To access images in WebIT, the user must first be given a Username and Password by completing the WebIT Account Request Form. The user is then granted access to the imaging system.

**Logging into WebIT**

1. Enter the assigned user name, and then click the **Sign in** button.

2. Enter the user password, and then click the **Sign in** button. **NOTE:** This password is encrypted and appears as small dots inside of the edit field instead of the actual characters. This functionality is standard, and is put in place so that other people cannot easily read the user name and password from the screen.
Once on the Home page, users will see three options:

**DATABASE**: Identifies what image database the user has access to (currently defaults to OPTIDOCFIN)

**DOCUMENT COLLECTION**: Identifies the specific collections of images that are available within the database, based on the collections the user is authorized to view.

**DOCUMENT COLLECTION**: Currently a default setting based on the Document Collection selected.

3. Click on the **DOCUMENT COLLECTION** Drop-down menu and select the appropriate collection to search. For example, to search for invoices paid through Accounts Payable for purchase orders, select **AP_BATCH**. To search for Journal Entry documentation, select **ORACLE_JOURNAL_ENTRIES**. To search for Payment Request invoices, receipts, or other documentation, select **ORACLE_PAYMENT_REQUESTS**. To search for quotes, contracts, and other documentation related to purchase order requisitions, select **PO_REQUISITIONS**.

4. Click on the **Search Screen** button to enter the search criteria.
5. The **SEARCH IN FIELDS** options will appear.

6. The OptiDoc Index fields will be listed in the first drop-down menu. Select the desired field (you can obtain this information from Monthly Account Statements, Oracle account queries, other Oracle menus, copies of submitted documents, etc).

7. The OptiDoc Relationship field allows you to refine your search with one of the statements: **Equal to, Not Equal to, Contains, Does Not Contain, Begins With, Ends With, or Like**. Choose the best relationship for the known criteria. For example, if exact information is known, select **Equal to**. However, if the exact information is not known, use a less restrictive relationship, such as **Contains**.

8. Enter the search criteria desired in the next field. The search can also be expanded by using a “%” as a wild card. This is particularly helpful when only a part of the criteria is known, to return all entries in a Collection.
9. Once the criteria are entered, click on the **Search** button to start the search.

### Viewing Search Results

All documents meeting the criteria entered will be displayed in the results window.

**Note:** Specific searches using the **Equal** to relationship generally return a single document (i.e. searching by document number). Less refined or less restrictive searches may return several documents, in which case it might be necessary to review several of the returned documents to locate the correct one.

To view a single document, check the **View** checkbox for the document to be viewed, and then click on the **Perform Actions** button.

To view multiple documents, check the **View** checkbox for all documents to be viewed, and then click on the **Perform Actions** button.

The document image will be displayed in the Acordex viewer. If you select multiple records to view, each individual record will be in a separate Acordex viewer.
Click the **SEARCH SCREEN** button at the top of the window to start a new search within the same collection.

Click the **HOME** button to start a new search for a different collection.

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**Refining the Search: Using Multiple Criteria**

A search can be refined by looking for two or more search criteria to narrow down the results. To do this, click the blue arrow next to the **SEARCH IN FIELDS** criteria fields. ➤ This will create a new line for additional search options.
Once the search criteria are entered, click the **Search** button to start the search.

To remove an added line, click on the down arrow.

**Refining the Search: Using Or and And**

In addition to using multiple criteria, it is also possible to refine the search by using the **Or** and the **And** relationship options in the last drop-down menu. Selecting **And** will require that all criteria be met before a document is returned. Selecting **Or** will require that only one of the criteria be met before a document is returned.