

# ONE LOOK – IBMi / Cloud

### Real Vision Software, Inc.

Enterprise Content Management (ECM) Software

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## **1. OVERVIEW**

This manual was developed for existing and potential Real Vision Software (RVI) customers interested in learning about the functionality and features of the One Look interface. This manual is specific to One Look – IBM i / Cloud installations.

One Look is the latest RVI user interface. It provides a consistent look and feel across the IBM i, Cloud, and Windows platforms. It is a browser based, graphical interface developed in Sencha (JavaScript Framework). One Look runs in all browsers, but Internet Explorer (*IE 11 or higher*) and Google Chrome (*Chrome 60 or higher*) are preferred.

Please contact **<u>Real Vision Software</u>** to schedule your One Look installation.

### 2. INTERFACES

# **RVI** INTEGRATES YOUR APPLICATION AT NO CHARGE



Please contact <u>Real Vision Software</u> for further information or questions on setting up an interface.

### **3. INSTALLATION**

#### **Requirements:**

- **RVIWEB Server** running on an IBM i server.
- Identify the RVIWEB Server IP address and port number.

#### **Installation:**

#### Contact **<u>RVI Support</u>** for installation.

#### Setup and Testing:

- 1. Create an internet login for each user.
- Unsecure instance: Go to http://ipaddress:port/internet/cmnss/imageinquiry/app/index.html to access the signon screen.
   Secure instance: Go to https://ipaddress:port/internet/cmnss/imageinquiry/app/index.html to access the signon screen.

## **4. CONFIGURATION OPTIONS**

One Look **DISPLAY** configurations:

- · One Look displaying images as PDF in the browser
- One Look displaying images as TIF in the <u>RVI PC Viewer</u>
- One Look displaying images as TIF in <u>RVIINET</u> (IE ONLY)
- 5250 emulation calling One Look displaying images as PDF in the browser (See <u>5250 Configuration</u> <u>Options</u> for details.)

One Look SCAN/IMPORT/DRAG DROP/SEND TO RVI/PRINT TO RVI/ANNOTATION configuration:

One Look calling the <u>RVI PC Viewer</u>

### 4.1. 5250 Configuration Options

There are 5 possible 5250 workstation configurations to use with One Look.

The configuration is set on the IBMi using the RVI Maintenance Menu.

To access the RVI menu, **RVILIB** must be in your library list. To add RVILIB to your library list, type **ADDLIBLE RVILIB** from an IBM i command line.

From an IBM i command line, type GO IMAGE

- 1. Option 8 Maintenance Menu
- 2. Option 7 Maintain PC Workstation Configuration
- 3. F10 = Add A Record

(If the device or user is already listed in the table, put an **X** next to the record to edit.)

4. Set Image Viewer to O, P, E, F, G

Maintain PC Workstation Configuration Screen (c)Copyright RVI 1992, 1999
X=Select A Mapping Type CRTRVIFM/CNT100D5
D.Y=Data Queue S.N=Folders 1=FTP-TCPADDX Value
X=Select A Mapping Type CRTRVIFM/CNT100D5 _ D,Y=Data Queue _ S,N=Folders _ 1=FTP-TCPADDX Value _ F=FTP _ U=UNC _ 2=UNC-SYSTEMX Value
X=Select An Image Viewer (For further info, tab to entry field, then F1)
Yellow Image Viewer types are OneLook-specific
Y=Use Windows Associated Viewer N=Use RVI PC Viewer
V=Convert To PDF, Use RVI PC Viewer
H=Convert To PDF, Hyperlink To Browser
_ I=Index List in Browser, Display In Browser
J=Index List in Browser, Display In RVI PC Viewer
_ K=Index List in RVI PC Viewer, Display In RVI PC Viewer
R=Index List in Green Screen, View in RVI PC Viewer, No HLLAPI
_ L=No HLLAPI, Display in RVI PC Viewer
M=Index List in RVI PC Viewer, Display in RVI PC Viewer, No HLLAPI
_ O=Index List in Green Screen, View in OneLook, Using Polling
_ P=Index List in OneLook, View in OneLook, Using Polling
E=DataQue to Socket Using OneLook, No Polling
F=DataQue to Socket Using Onelook, No Polling, Scanning To Viewer
G=HLLAPI Support in Onelook, No Polling
F1 =Additional Image Viewer Description Enter =Continue

### 4.1.1. O = Index List in Green Screen, View in One Look, Using Polling

### **Type O Configuration**

Uses Green Screen, Index List on green screen, and views go to One Look.

Use with minimal users; otherwise, system performance will be affected.

Requirements:

- 1. Active 5250 session
- 2. RVI PC Viewer shows 'Connected: A'.
- 3. One Look browser shows 'Host Connected'.

Image Inquiry (Host Connected)

#### Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- · 5250 index list of search results
- · One Look display

#### Scanning:

- 5250 emulation scan request
- · One Look sends the scan request to RVI PC Viewer
- RVI PC Viewer scans
- RVI PC Viewer accept/reject
- · Automatic upload via scan direct

### 4.1.2. P = Index List in OneLook, View in One Look, Using Polling

### **Type P Configuration**

Uses Green Screen, Index List in OneLook, and views go to One Look.

Use with minimal users; otherwise, system performance will be affected.

#### Requirements:

- 1. Active 5250 session
- 2. RVI PC Viewer shows 'Connected: A'.

3. One Look browser shows 'Host Connected'.

Image Inquiry (Host Connected)

- «

Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- One Look index list of search results
- · One Look display

#### Scanning:

- 5250 emulation scan request
- · One Look sends the scan request to RVI PC Viewer
- RVI PC Viewer scan
- RVI PC Viewer accept/reject
- · Automatic upload via scan direct

### 4.1.3. E = DataQue to Socket Using One Look No Polling

### **Type E Configuration**

Uses Green Screen and One Look with System Tray Socket. The Scan request will travel to One Look, then to the RVI Viewer.

This will allow the user to then Inquire/View through One Look.

Type E configuration can be used in custom interfacing using the One Look EXE.

#### Requirements:

1. Active 5250 session

#### 2. Set <u>RVI Socket Server</u> credentials

- RVI PC Viewer shows 'Socket' in the bottom right hand corner.
   Socket
- 4. One Look browser shows 'Socket Connected'.

Image Inquiry (PC-Socket Connected)

#### Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- One Look index list of search results
- One Look display

#### Scanning:

- 5250 emulation scan request
- · One Look sends the scan request to RVI PC Viewer
- RVI PC Viewer scan
- RVI PC Viewer accept/reject
- Upload
  - 5250 emulation scan request using MVC013D = Automatic upload via scan direct.
  - 5250 emulation scan request using MVC013 = Manual upload using the RVI Scan Menu, Option 11 Upload Scanned Image To Host.

### 4.1.4. F = DataQue to Socket Using One Look No Polling Scanning To Viewer

### **Type F Configuration**

Uses Green Screen and One Look with System Tray Socket. The Scan request will travel to One Look, then to the RVI Viewer.

Y Type F configuration can be used in custom interfacing using the OneLook EXE.

#### Requirements:

- 1. Active 5250 session
- 2. Set <u>RVI Socket Server</u> credentials
- RVI PC Viewer shows 'Socket' in the bottom right hand corner.
   Socket
- One Look browser shows 'PC-Socket Connected'.
   (Only a requirement for Viewing. One Look browser is NOT needed for scanning with Type F.)
   Image Inquiry (PC-Socket Connected)

#### Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- One Look index list of search results
- · One Look display

#### Scanning:

- 5250 emulation scan request
- RVI PC Viewer scan
- · 5250 accept/reject
- Upload
  - **5250 emulation scan request using MVC013D =** Automatic upload via scan direct.
  - **5250 emulation scan request using MVC013** = Manual upload using the RVI Scan Menu, *Option 11 Upload Scanned Image To Host.*

### 4.1.5. G = HLLAPI Support in One Look, No

## Polling

### **Type G Configuration**

This configuration is used for custom interfaces. It requires the installation of <u>RVI One Look executable</u> on the user's pc.

For setup instructions, view the RVIOneLook.exe video.



When a Green Screen operation is invoked that results in an index list or viewing a specific image, the Index List is displayed in RVIOneLook.exe and the View is done in RVIOneLook.exe. Scanning request are triggered from the green screen and RVIOneLook.exe using the Twain scanner driver.

#### Requirements:

- 1. Active 5250 session
- 2. Exit out of RVI Socket Server in the system tray if it's installed and running.

#### Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- · One Look exe index list of search results
- One Look exe display

#### Scanning:

- 5250 emulation scan request
- One Look exe scan using Twain
- 5250 accept/reject
- Upload

- 5250 emulation scan request using MVC013D = Automatic upload via scan direct.
- **5250 emulation scan request using MVC013** = Manual upload using the RVI Scan Menu, *Option 11 Upload Scanned Image To Host.*

### 5. LOGIN

- 1. Open your internet browser.
- 2. Navigate to http://ipaddress:port/internet/cmnss/imageinquiry/app/index.html.

(For secure instance) https://ipaddress:port/internet/cmnss/imageinquiry/app/index.html

3. Enter a valid internet user id and password.



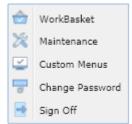
The list of available RVI system codes will appear based on the <u>user security</u> set on the IBM i server. Results can be sorted in ascending or descending order by clicking the System or System Name heading.

Image Systems Total Systems: 38 System	-			
	· · · · · · · · · · · · · · · · · · ·	leru -	4 4 Page 0 of 0 ≥ ≥  ⊕ Pho data to display	Display Overked 🗮 Display Option
System				
	System Name +		*** Ready to Search ***	
2	ACCUF ACTIVITY/JOURNAL			
P	ACCUFUND A/R SYSTEM DEHO	^		
0	ACCUFUND ACCOUNTS PAYABLE DEMO			
0	ACCUFUND CASH RECEIPT			
5	ACCUPUND GRANT ITEMS			
5	ACCUPUND PURCHASE ORDERS			
Q	ACCUPUND REQUISITIONS			
3	ADMISSION IMAGES			
9	AP DYNAHICSAX			
D	AP SYSTEM			
A	AP WORKPLOW SYSTEM			
	AR SYSTEM			
	ARKANSAS STATE TREASURER			
1	ARKANSAS STATE TREASURER-DEMO			
5	BAINDING DDA SYSTEM			
	BANKING LOAN SYSTEM			
¢	BUNZEL TEST DHAGE SYSTEM			
c	CASEND DEHO			
z	COURT DOCUMENTS AND EXHIBITS			
	COURT SYSTEM			
1	DENO SYSTEM FOR JDE INTERFACE			
W	DEMO WORK SYSTEM			
Y	FIDELITY BANK SAMPLE DATA			
x	FULL TEXT SEARCH DEMO	~		

Contact your system administrator for assistance with login credentials and system access.

## 6. MENU

The Menu drop down is found within Image Inquiry in the top right corner of the left window pane. It is used to access <u>WorkBasket</u>, <u>Maintenance</u>, <u>Custom Menus</u>, <u>Change Password</u>, and <u>Sign Off</u>.



## 6.1. WorkBasket

To watch a video on this topic CLICK HERE

All workbasket and routing setup must be done through the IBM i green screen interface. RVI is currently updating the One Look Maintenance tab to handle these tasks in the future. For instructions and information on document workflow setup, reference the <u>RVI 90 IBMi</u> <u>User Manual</u>, Chapter 6.

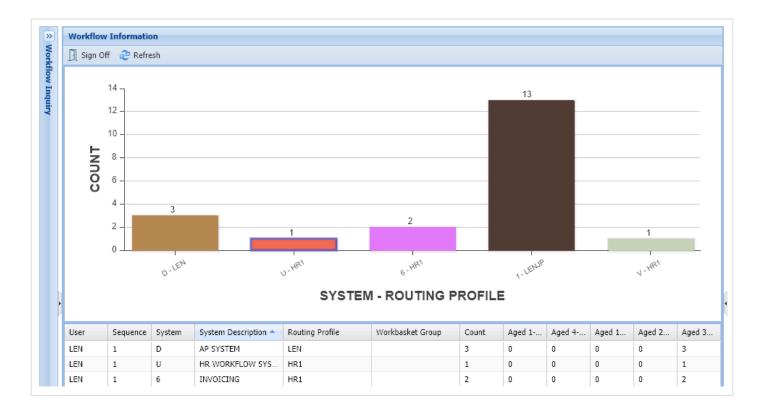
To access workbaskets and workflow functions, from One Look:

1. Click the Menu button, select WorkBasket from the drop down list.

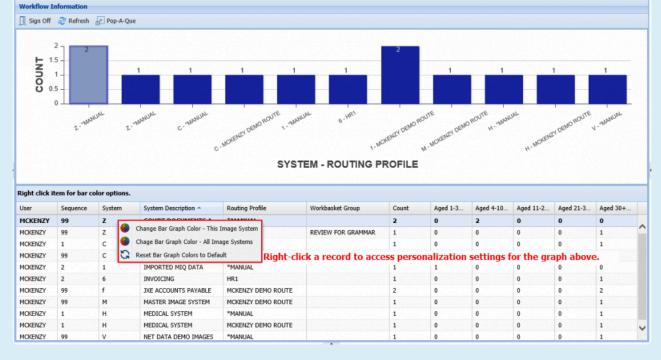
(Workbasket access is based on the One Look user id.)



The user is automatically taken to Workflow Inquiry/Workflow Information where they will see a graphical representation of routing profile counts and a list of workbasket items.



## The graph can be personalized by right-clicking on the grid at the bottom of the screen. The graph default color is Deep Blue.



2. Double-click a record to see a list of documents contained within the workbasket.

3. Work with the documents that have been routed to the workbasket by double-clicking a record or enable

the checkbox under the Flags column to select multiple record(s) then click

Display Checked Items

z-co	URT DOC	UMENTS AND EX	HIBITS User = MC	(ENZY, Routing Profi	le = *MANUAL						0
<u>ا</u>	lack 📀	Que Up For Approv	al 📋 Que Up For Bat	ch Indexing 🛛 Pop-A	-Que Records: 5 Selec	ted: 5				Display Options 🔹 💽	Workbasket Charts
7	-	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE	$\bigcirc$	Display Checked Item	s YS OLD
	Flags								11	Show Row Numbers	
		030299	08/15/2017	S CLAUSE	M CLAUSE	D	SMITH	JUDGEMENT		Grid To Excel	
7		022618	11/29/2018	J GOOD	E LIVINGSTON	W	S ELMS	FILE	3		>
7		012419	01/23/2019	H ILES	E REED	W	Q WILES	ORDER	8	•	D
7		031619	01/29/2019	V VERSION	P VERSION	0	J MILES	ORDER			D
7		011319	04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT	18		0

U-HI	R WORKFLO	W SYSTEM User = LEI	I, Routing Profile = HR1				0
	Back 🔽 Qi	ue Up For Approval 🛛 📔 Qu	e Up For Batch Indexing	Records: 2	Display Checked Items	Show Row Numbers	🚮 Workbasket Charts 🗕
	Flags	EMPLOYEE #	DATE	DEPT	DOCUMENT TYPE	PRIORITY CODE	DAYS OLD
	riags						
		1000	06/21/2018	CLERK	APP		102
	\$	1200	06/22/2018	IS	BC	6	0

Hover over corresponding Flags to get tooltips and details including Notes, Packages, Call Back Reminders.

•	Back	✓ Que	Up For Approval	📄 Que Up	For Batch Indexing	Records: 1	Displa	ay Checked Items	Show Row Numbers	🕋 Workbasket Charts
	Flags	E	EMPLOYEE #	DATE	E	DEPT	DOCUME	NT TYPE	PRIORITY CODE	DAYS OLD
	riays									
		<b>1</b>	L000	06/2	21/2018	CLERK	APP			102
	Notes Listing									
		Flags	User	Note			Entry Date	Close Date		
		с	LEN	JUDY HA	SN'T APPROVED IT		07/19/18	09/10/18		

Right-click an item to access additional functions such as Note, Index, and Audit information.

	Back 🔽 Q	ue Up For Approval 🛛 📳 🤇	Que Up For Batch Indexi	ng Records: 2	Display Checked Items	Show Row Numbers	🕍 Workbasket Charts 🗸
	EMPLOYEE #		DATE	DEPT	DOCUMENT TYPE	PRIORITY CODE	DAYS OLD
		1000	06/21/2018	CLERK	APP		102
	\$	1200	06/22/2018	IS	ВС	6	0
<ul> <li>Index Details</li> <li>Index Maintenance</li> <li>Audit Information</li> <li>Z-Options</li> <li>Show In Window</li> </ul>							
	ave the	option to appro	ove and index	k directly from	the display window		Approval and
_	h Indexin	-					

Email		
(j) Index Details		81 // 1881 <u>  81</u> 81_
Notes -	APPLICATION FOR EMPLOYMENT	2123 32 S
		<u> </u>
Index Maintenance	PERSONAL INFORMATION DATE OF APPLICATION: 9-6-11	
Approval		
Delete From Basket	Name: DOC John Alex Last First Middle	
<ul> <li>Audit Information •</li> </ul>		702
Routing -	Address: 100 Main St. Apt 201 Springfield IL 62. Street (Apt) City/State Zip	10,9
Move Subgroup	Alternate Address:	
Ca. Move Profile	Street City/State Zip	
5 Call Back	Contact Information: 555555555555555555555555555555555555	.com
	How did you learn about our company? Job Fair	
	Desired Pay Range: 7 9, 5 00 Are you currently employed? No	_
	EDUCATION	
	EDUCATION Name and Location Graduate? - Degree? Major / Subjects of Stu	idy
	Name and Location Graduate? - Degree? Major / Subjects of Stu	lies
	Name and Location         Graduate? - Degree?         Major / Subjects of Stud           High School         Springfield High-±L         Yes         General Stud	lies
Image ID:UAAAAB63	Name and Location     Graduate? - Degree?     Major / Subjects of Stud       High School     SpringField High - 12     Yes     General Stud       College or University     SpringField University, IZ     Yes     Bachalors - Bus       Specialized Training,     Image: SpringField University, IZ     Yes     SpringField University, IZ	lies

### When accessing the Workflow Inquiry screen, users will have access to functions and symbols to help them navigate their workbasket.

Flags: Symbols under the Flags column inform the user of special conditions associated with the record.

*	The document has been routed outside the normal routing profile.
١	Call Back notice has been entered. A red callback symbolizes the call back notice is overdue. A green callback symbolizes a call back exists. A yellow callback symbolizes the call back notice is due today.
È	Notes are attached.
0 – 9	Indicates priority routing.
Ĩ	Packages are setup. A green package symbolizes the package is complete. A red package symbolizes the package has missing documents.

U	Image was routed from another user.
5	Stapled documents are available. View the document()s) stapled to the primary document.

**Sort:** Sorting allows the user to change the order in which the workbasket items appear. Select the drop down arrow next to the index then choose Sort Ascending or Sort Descending.

+	Back 🔽 Que	Up For Approval 🛛 📄 Que Up For I	Batch Indexing Records: 2		Display (	Checked Items 📒 Show Ro	ow Numbers 🛛 🕍 Workbasket Charts
_		EMPLOYEE #	DATE	DEPT 👻	- DOC	CUMENT TYPE	PRIORITY CODE
	Flags	×	×		× _21 s	Sort Ascending	×
		1000	06/21/2018	CLERK	<mark>⊼</mark> ↓ s	Fort Descending	
		1645	08/28/2018			Columns 🕨	

**Filter:** Filtering allows the user to narrow down the list of workbasket items based on index values. Enter the desired index values in the input fields below the index headers.

U-HR WORKFLOW SYSTEM									
🔦 Back 🔽 Que Up For Approval 📳 Que Up For Batch Indexing Records: 2 😨 Display Checked Items 🗮 Show Row Numbers 🚈 Workbash									
		EMPLOYEE #	DATE	DEPT 🔻	DOCUMENT TYPE	PRIORITY CODE			
	Flags	1000 × ×	×	×	×	×			
		1000	06/21/2018	CLERK	APP				

**Columns:** Pick the desired columns to be displayed. Select the drop down arrow next to any index then choose Columns.

1200       06/22/2018       1       Soft Ascending       Soft Ascending       Soft Ascending         1000       06/21/2018       1       Soft Ascending       Soft Ascen								CALLBACK		٥	
□       1200       06/22/2018       \$1       Sott Ascending       SQUSRR       •         □       1000       06/21/2018       \$1       Sott Descending       SQUSRR       •         □       1000       06/21/2018       \$1       Sott Descending       SQUSRR       •         □       1000       06/21/2018       \$1       Sott Descending       SQUSRR       •       •         □       SQUSR       □       SQUSR       □       •       •       •       •         □       SQUSR       □       SQUSR       □       •	*	Back 🔽 Qu	e Up For Approval 🛛 📔 Que Up	For Batch Indexing Records:	: 2				d Items 👌 🗮 Show	v Row Numbers 🛛 🕍 Workbasket Char	rts
1200       06/22/2018       21       Sort Ascending       SQUSR       •         1000       06/21/2018       3.4       sort Descending       SQUSR       •         SQDATR       SQDATR       SQDATR       •       •       •         SQDATR       SQUSR       SQUSR       SQUATR       •       •         URK       GRP       URK       GRP       •       •       •         USER BASKET       VB INSTANCE       USER BASKET       VB INSTANCE       •       •       •         DOCUMENT YPE       VB INSTANCE       •       DATE       •       •       •       •         VB INSTANCE       •       DATE       •       DOCUMENT YPE       •		el.	EMPLOYEE #	DATE 🔻	-	DEPT		SQSYS	T TYPE	PRIORITY CODE	
Item         Item         Operations         At sold December         SQRTSN         SQRTSN           1000         06/21/2018         III Columns         SQATR         SQATR         SQATR           SySTRAN         URK         GRP         URK         GRP         USER BASKET         USER BASKET         VIS INSTANCE         SUSTINANCE         SU		Flags		×	× Å	Sort Ascending		SQAPPR	×	×	
Image Inquiry       Device 1d:\$00107128       User Id: MCKENZY         Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY               Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY              Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY              Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY              Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY             Image Inquiry       Device 1d:\$0017128       User Id: MCKENZY                 Image Inquiry       Device Id:\$0017128       User Id: MCKENZY			1200	06/22/2018	Z	Sort Descending	10000			*	
SQDATR SQDATR SYSTRAN URK GRP USER BASKET VWB INSTANCE VMB INSTAN		向	1000	06/21/2018			10.000	SQRTSN		*	
Real Vision Image Inquiry       Device Id:\$0000718       User Id: MCKCE         Image Inquiry       Device Id:\$0000718       User Id: MCKCE								SQDATR			
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POITE	Rea	al Vision Image	Inquiry	Device Id	:\$00107128	User Id: MCKENZY		NOTES	0	Real Vison Software, All Rights Reserve	ed
								ROUTE	-		

### 6.1.1. WorkBasket Tools

To watch a video on this topic CLICK HERE

### **Right-Click Menu**

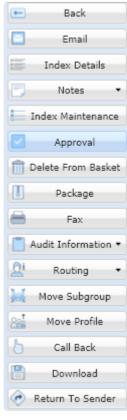
Add Notes
Email Image
Fax Image
Index Details
Index Maintenance
Ownload
Audit Information
C-Options
Show In Window
Show In Window
Move Profile
Detet Item

Show Notes	Display existing notes and add new notes.(Will only appear if notes exist.)
Add Notes	Permits the user to type a note. If there is a note attached to an image, will appear at the left side of the index listing under the Flags column.
Email Image	Email the selected document.
Fax	Contact <u>RVI Support</u> for requirements.
Index Details	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Index Maintenance	Permits the user to update the index information for the selected image. This option also allows for deletion of the document.
Download	Save the selected document to local storage.
Audit Information	Tracking the sequence of events associated with the document.
Z-Options	Perform a user-defined function. Z-Options are setup on the IBM i.
Show In Window	View the selected document(s) in a new window frame.
Move Profile	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to select the desired routing profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Delete	Remove the selected record from the workbasket.

#### **Workflow Inquiry Toolbar**

🗲 Back 🔽 Que Up	o For Approval 📳 Que Up For Batch Indexing 🔛 Pop-A-Que Records: 2 📄 Display Options 🔹 🕍 Workbasket Charts 🔻
Back	Return to the list of workbaskets.
Que Up For Approval	Sequentially work all items in the workbasket routed for approval or disapproval.
Que Up For Batch Indexing	Sequentially work all items in the workbasket waiting to be indexed.
Pop-A-Que	Work items from a central routing queue. (Only available for users enrolled in Pop-A-Que.)
Records	Number of items in the workbasket.
Display Options	Includes: <i>Display Checked Items</i> allowing users to view all flagged items, <i>Show Row Numbers</i> to activate numerical designation of each row, and <i>Grid To Excel</i> to export the subfile list to an excel spreadsheet.
Workbasket Charts	Graphical representation of a user's workbasket with 4 options: <u>Aged Items</u> , <u>Active-</u> <u>Forthcoming</u> , <u>Totals</u> , and <u>Approval History</u> . Users can select from bar, pie, or line formats.

### Image Display Top Toolbar



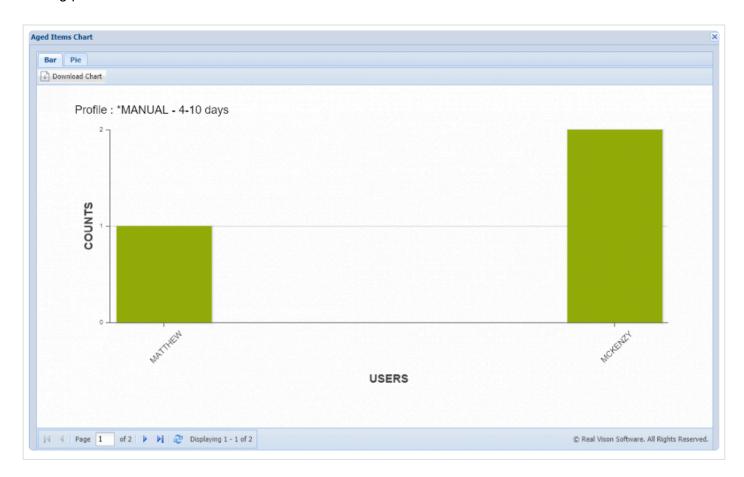
Back

Return to the list of items in the current workbasket.

Email	Email the selected document.
Index Details	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Notes	Permits the user to type a note and view existing notes. The icon will appear in red when a note exists.
Index Maintenance	Permits the user to update the index information for the selected image. This option also allows for deletion of the document.
Approval	Perform workflow approval on this item.
Delete From Basket	Remove an item from your workbasket. When the current user is finished with the image, they must delete the image from their workbasket. This permits the next sequence number in this routing profile to access this image.
Package	Displays a list of documents that make up the package. If there is a package and all documents in the package exists, if will appear under the Flags column. If there is a package but some documents in the package are missing, if will appear under the Flags column. View package documents by double-clicking the record. In the subfile list, missing items will be labeled (MISSING). (Button will only appear if a package exist.)
Fax	Contact <u>RVI Support</u> for requirements.
Audit Information	Includes View, Workflow, and Approval audit. Display the history of the item including view, print, email, change, route, fax, cd, and signature requests.
Routing	Send the image to another Profile or User.
Move Subgroup	Move the current image to a user defined subgroup within your workbasket.
Move Profile	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to select the desired routing profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Call Back	Enter a target date that will trigger a future notification of an event that needs to occur and a descriptive message for the notification. If a call back reminder exists, $3$ will appear under the Flags column. If the call back is currently due, $3$ will appear. If the call back is overdue, $3$ will appear.
Download	Save the selected document to local storage.
Return To Sender	Return the document to the previous user in the routing sequence. This option will only appear if it can be determined that there is a previous user in the routing sequence.

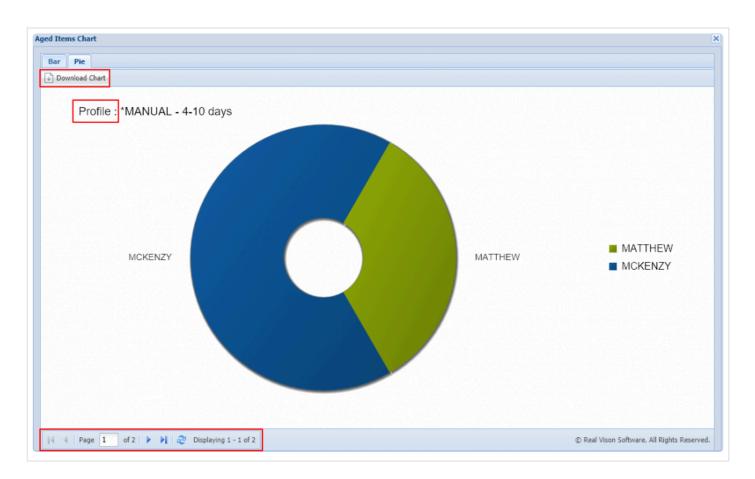
## 6.1.1.1. Aged Items Chart

The Aged Items Chart is a visual representation (Bar or Pie format) of all the items sitting in a basket or routing profile for a number of days. The first display of the chart portrays a clean column chart designed to show quantities of items in the routing profile. The Y-axis describes the counts or quantity of items in the routing profile. The X-axis illustrates the name of the user in the route associated with the counts.



All Items are classified into five categories:

- 1 3 Days Old
- 4 10 Days Old
- 11 20 Days Old
- 21 30 Days Old
- 30 + Days Old



At the top left-hand corner of the chart area, it is easy to find the name of the profile and the category in which the item is sitting in the system.

All of the titles are updated automatically and each item is placed into its proper category respectively.

Another feature found in the Chart's window is the paging toolbar, located at the bottom left-hand corner of the window. The Paging toolbar handles navigating between each of the categories.

In the top left-hand corner underneath the tabs; a download button is available. The user can save the desired image to the local storage, generally saved to the Downloads folder of the local system unless specified otherwise.

## 6.1.1.2. Active and Forthcoming Chart

The Active and Forthcoming Chart is designed to visualize (Bar or Line format) the users in the route, their sequence order, and the items moving in the route. At first look, the Active-Forthcoming chart does not show too many differences from the Aged Items chart; however, there are some subtle variances in the way the data is displayed and what the data means in this format. The Paging toolbar is no longer available since there is not a need to control paging navigation in this chart. Most of the features on the left-hand corner of



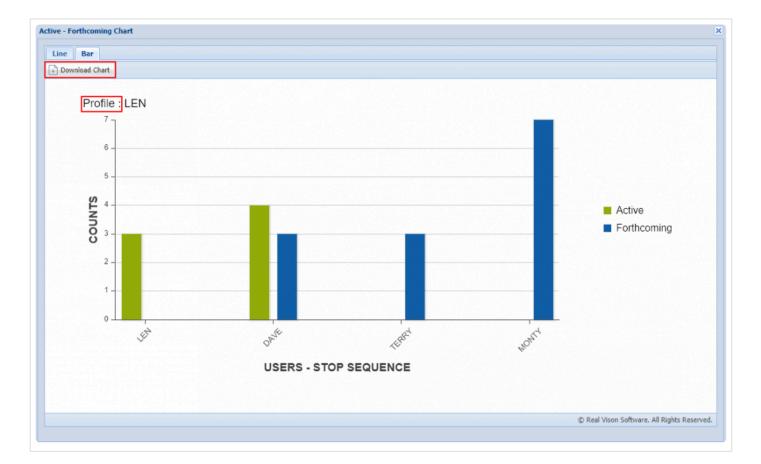
#### the chart are still in place and available, including the tabs and the download button.

The Active-Forthcoming Chart uses tabs to display the data in two different formats, a combination of a bar and line charts. The Bars in the graph take the color green to denote the active items sitting on the user's sequence in the route. The blue line in the graph signifies the awaiting item to arrive at the next sequence in the route.

The way in which an item can move to the next position in the sequence is by queuing for approval. The approval process is done on the window grid by clicking the button next to the back button or by selecting the image and clicking the approval button on the PDF window. At that point, the document leaves the current position and moves to the next user in line.

On the right side of the graph area, the user can find the labels for active and forthcoming. Clicking the labels will temporarily clear or add those components to the chart.

In the top left-hand corner of the window, it shows the route's profile name and the tabs above the download button. The right tab illustrates the data in a column chart where green columns are for active items and blue columns for forthcoming items.



### 6.1.1.3. Totals Chart

The Totals Chart is a visual representation (Line,Bar, and Pie formats) of the total items in ALL user workbaskets for the **active** System. The Line and Bar chart formats will display active and forthcoming items in a user's workbasket for the active System. The Pie chart format will only display active items sitting in a user's workbasket for the active System.

Three tabs can be found at the top left-hand corner of the window allowing users to navigate between the various chart formats. Additionally, the **Download Chart** button is available for saving charts to local storage. Moreover, a **Refresh Charts** button has been included to facilitate the reloading of data, negating the need to close and reopen the window to see updated counts.

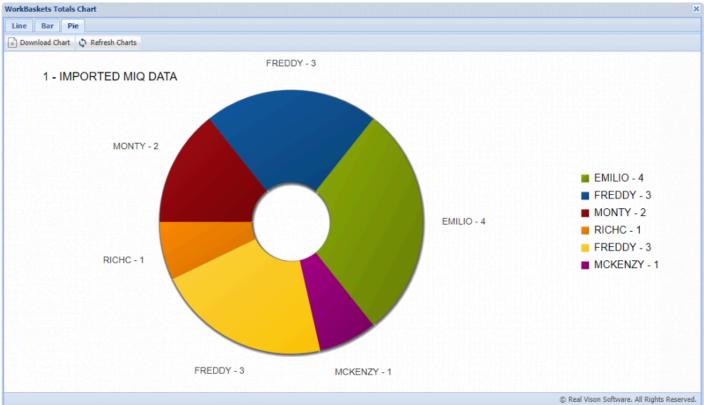
Line Chart:



#### **Bar Chart:**

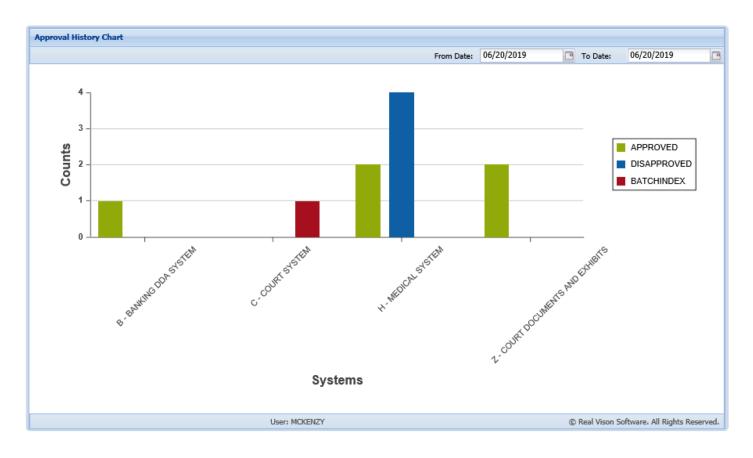


#### Pie Chart:

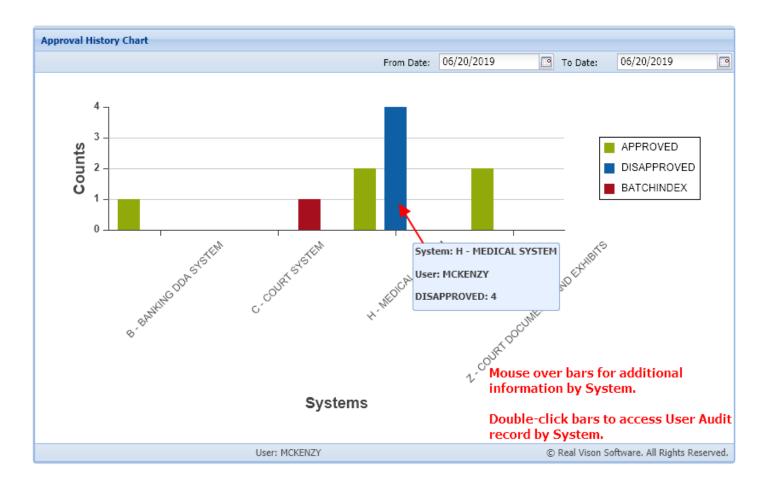


### 6.1.1.4. Approval History Chart

The Approval History Chart is a visual representation (Bar format) of all items by System that have been approved, disapproved, or batch indexed for the current user for the specified date range.



Mousing over the bars will provide additional details by System. To access the approval history of the System, double-click the bar to display the User Audit.



The User Audit provides indexing information and the date/time of the action taken on the record. To access Workflow Audit, double-click the record.

User Audit I	nformation								
🗲 Back Re	cords: 4								
Index 1	Index 2	Index 3	Index 4	Index 5	Index 6	Index 7	Action	Date	Time
12345						APP	DISAPPROVED	06/20/2019	11:51:44
12345						APP	DISAPPROVED	06/20/2019	11:51:26
12345						APP	DISAPPROVED	06/20/2019	11:51:15
240164	01/20/2012			,		INSURANCE CA	DISAPPROVED	06/20/2019	11:51:09
						Double	-click a reco	rd to view V	Vorkflow Audi

Workflow Audit displays all the workflow activity associated with the selected record.

Workflow Audit Information										
🔦 Back Red	cords: 11									
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail
FREDDY	02/20/2019	10:03:53	* - Initial Route	AAAAC5N	AAAAE27	HR1()	HR1	E - Image Im	Auto Routing	D - Image Im
LEN	03/14/2019	14:44:57	* - Initial Route	AAAAC7P	AAAAE5E	MCKENZY DE	MCKENZY DE	V - Image In	User-Selected	X - Image Inq
LEN	03/14/2019	14:46:31	* - Initial Route	AAAAC7Q	AAAAE5F	MCKENZY DE	MCKENZY DE	V - Image In	User-Selected	X - Image Inq.
MCKENZY	03/14/2019	14:54:24	* - Initial Route	AAAAC7T	AAAAE5I	MCKENZY DE	MCKENZY DE	V - Image In	User-Selected	X - Image Inq
LEN	03/14/2019	16:00:46	* - Initial Route	AAAAC7X	AAAAE5R	MCKENZY DE	MCKENZY DE	V - Image In	User-Selected	X - Image Inq
LEN	03/14/2019	16:01:45	* - Initial Route	AAAAC7Y	AAAAE5S	MCKENZY DE	MCKENZY DE	V - Image In	User-Selected	X - Image Inq
MCKENZY	06/20/2019	11:51:15	K - Apprv/Dis	AAAAC7P	AAAAE5E	DISAPPROVED	DISAPPROVED	W - Workbas		- ADDITIONA
MCKENZY	06/20/2019	11:51:26	K - Apprv/Dis	AAAAC7Q	AAAAE5F	DISAPPROVED	DISAPPROVED	W - Workbas		- ADDITIONA
MCKENZY	06/20/2019	11:51:36	K - Apprv/Dis	AAAAC7T	AAAAE5I	APPROVED	APPROVED	W - Workbas		- ADDITIONA
MCKENZY	06/20/2019	11:51:44	K - Apprv/Dis	AAAAC7X	AAAAE5R	DISAPPROVED	DISAPPROVED	W - Workbas		- ADDITIONA
MCKENZY	06/20/2019	11:52:37	K - Apprv/Dis	AAAAC7Y	AAAAE5S	APPROVED	APPROVED	W - Workbas		- ADDITIONA

# 6.1.2. Que Up For Approval

To watch a video on this topic CLICK HERE

## Que Up For Approval

The user can sequentially work all images in the workbasket that have been routed for Approval or Disapproval.

Vorkflow Inquiry	**	E Back	🖺 ሱ 🖶 🖂 🔍 🛛 8 / 10 🚥 🦾 Share 🕜 🌔
Queue Up Approval		Email	
Subn	nit 🔝 Skip 🔇 Cancel	Index Details	
doctorial information		Notes -	granted the temporary care, custody and control of the minor children, Layla Grace St.
Approval		Index Maintenance	Romaine and Christopher Mason Jarred, persuant to La. C.C.P. art. 3945, until the trial of
Approve	Disapprove	Package	
Action Code	~	Fax	the rule hereifnabove scheduled.
		Audit Information •	If IS FURTHER ORDERED that temporary visitation with the prother is set as
Notes		QI Routing •	follows:
		Move Subgroup	
Notes List		Call Back	IT IS FINALLY ORDERED that the ex parte order had been denied and the parties
THIS IS THE LAST NO		Download	shall share the physical custody of the minor children in the following manner:
		Return To Sender	Atterant sting Flang 2 wheede with wheeler
			in pitulary . Go llow de tre ab let a time
Audit Information			Pener Ecch for the nost con for sc
RVIWEB QTMHHTTP \ RVIWEB MCKENZY VII RVIWEB MONTY VIEW	EW ^	1	STANDING ORDER FOR PRETRIAL CONFERENCES IN FAMILY LAW MATTERS
KVIWEB LEN VIEW	· · · · · ·		I. The Ninth Judicial District Court has Ordered that a Pre-Trial conference be held in
SE #:	241781		this matter, in accordance with an evaluation program being conducted by the
E DATE:			Court. The purposes of the Pre-Trial Conference are:
E DATE:	04/22/2017		A. To discuss a resolution of any or all of the issues between the
ANTIFF:	E ZEND		parties, without the necessity of a hearing;
FENDANT:	H POTTER		<ul> <li>B. To resolve any Preliminary Motions or Exceptions which may dispose of the need for a hearing of the pending hearing;</li> </ul>
SE TYPE:	с		C. To resolve any issues affecting preparation for the Trial of the
URT/JUDGE:	MONTOGUE		hearing;
CUMENT TYPE:	PETITION		D. To discuss rescheduling the hearing to the earliest possible date which allows all parties to adequately prepare for the
IORITY CODE:			hearing; and
AYS OLD:	0		E. To enter an Order or Judgment as to all matters which can amicably be resolved without the necessity of a hearing on the issues pleaded.
🚫 Subn	nit 🔃 Skip 🚫 Cancel		
		Image ID:CAAAAAC3	II. All parties and their attorneys (if any) must attend the Pre-Trial Conference.

When the Queue Up Approvals option is selected the user will see the entry screen above.

Submit:	Click Submit to complete the process. This will process the information and place the next available image in the window for action.
Skip:	Ignore the image in the window and hold it in the queue for future action.
Cancel:	Close the approval window and return the image to full screen.
Additional Information:	The user can add descriptive information.
Disapprove / Approve:	The user can select one or the other for this image.
Action	Permits the user to select from a predefined list of codes. Setup predefined Action Codes as

Codoci	needed.
Codes:	
Notes:	Add or view existing notes associated with the document.
Notes List:	Listing of existing notes.
Audit Information:	Track the events of the image during the approval process.
Indexes:	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Back:	Return to the list of images available for approval.
Email:	Email the selected document.
Index Details:	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Notes:	Permits the user to attach a written note to a document and view existing notes.
Index Maintenance:	Permits the user to update the index information for the selected image. This option also allows for deletion of the document.
	Displays a list of documents that make up the package. Missing items will be labeled
Package:	(MISSING). If there is a package and all the documents in the package exists, will appear under the Flags column. View package documents by double-clicking the record.( <i>The Package</i> <i>icon is only present when a package is setup</i> .)
Fax:	Contact <u>RVI Support</u> for requirements.
Audit Information:	Includes View, Workflow, and Approval audit. Displays the history of the item including view, print, email, change, route, fax, cd, and signature requests.
Route Information:	Lists the sequence and the route history of the image.
Routing:	Route the image to another routing profile or user.
Move Subgroup:	Move the current image to a user defined subgroup within your workbasket.
Move Profile:	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to selected the desired routing profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Call Back:	Enter a target date that will trigger a future notification of an event that needs to occur and a descriptive message for the notification.

Download:Save the selected document to local storage.Return To<br/>Sender:Return the document to the previous user in the routing sequence. This option will only appear<br/>if it can be determined that there is a previous user in the routing sequence.

## 6.1.3. Que Up For Batch Indexing

To watch a video on this topic CLICK HERE

The user can sequentially work all images in the workbasket that have been routed for indexing.

Workflow Inquiry	Back A
Batch Indexing	
📄 Retrieve Indexes 🔒 Add to Previous Doc 💽 Upload 🔯 Attach	$\blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare  \blacksquare $
CASE #: 241781	Notes •
FILE DATE: 042217	Index Maintenance
PLANTIFF: E ZEND	granted the temporary care, custody and control of the minor children, Layla Grace St.
DEFENDANT: H POTTER	Romaine and Christopher Mason Jarred, pursuant to La. C.C.P. art. 3948, until the trial of
CASE TYPE: C	the rule herefrabove scheduled.
COURT/JUDGE: MONTOGUE	IT IS FURTHER ORDERED that temporary visitation with the prother is set as
DOCUMENT TYPE: PETITION	Move Subgroup
🔚 Assign GL 📓 Lookup 🥥 Submit 🕨 Skip 🔇 Cancel	Rei Move Profile
	Call Back IT IS FINALLY ORDERED that the ex parte order had been denied and the parties
	<ul> <li>bownload</li> <li>shall share the physical custody of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>Affermative Events of the minor châdren in the following manner:</li> <li>A the Ninth Judicial District Court has Ordered that a Pre-Trial conference be held in this matter, in accordance with an evaluation program being conducted by the Court. The purposes of the Pre-Trial Conference are:</li> <li>A to discuss a resolution of any or all of the issues between the parties, without the necessity of a hearing:</li> <li>To resolve any reliminary Motions or Exceptions which may dispose of the need for a hearing of the pending hearing:</li> <li>To resolve any issues affecting preparation for the Trial of the hearing; and</li> <li>To enter an Order or Judgment as to all matters which can amicably be resolved without the necessity of a hearing on the issues prepare for the hearing; and</li> <li>All parties and their attorneys (if any) must attend the Pre-Trial Conference.</li> </ul>
	Image ID:CAAAAAC3

When the Queue Up For Batch Indexing option is selected, the user will see the entry screen above.

<i>tact RVI</i> button
button
9
t feature.
e over
ext
. If
o allows
ge ckage is
view,

Move Profile:	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to selected the desired routing profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Call Back:	Enter a target date that will trigger a future notification of an event that needs to occur and a descriptive message for the notification.
Download:	Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.

## 6.1.4. Audit

WorkBasket audit details are found in the Audit section of the documentation.

## 6.1.5. Pop-A-Que

The Pop-A-Que routing feature allows multiple users to work the items that were routed to one central routing queue. For example, if you have a large number of items that get routed to the Billing routing queue for indexing, you can set up the Pop-A-Que feature to allow any number of users to automatically retrieve the next available item from the Billing routing queue and place it in that user's queue.

Enabling the Pop-A-Que feature is accomplished by assigning a Pop-A-Que routing profile to the multiple users who will work the queue.

### Perform the following from the IBMi:

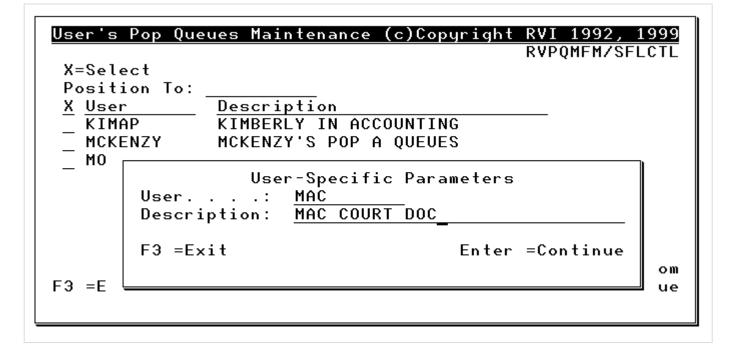
- 1. Navigate to the RVI main menu by typing **GO IMAGE**. (*RVILIB must be in your library list.*)
- 2. Option 8 Maintenance Menu
- 3. Option 17 Maintain User-Specific Parameters
- 4. Put an X next to Routing Pop-A-Queues

User-Specific Parameters (c)Copyr	<u>°ight RVI 1992, 1999</u> RVUS1FM∕FORMATO
X=Select _ Image Security By User _ Option Security By User _ Index Level Security By User _ Internet User Profiles _ Internet User Access (Customer Security X Routing Pop-A-Queues _ Screen Scrape Indexing Pop-A-Baskets _ Routing Workbasket Access _ Routing Destinations _ User Index Maintenance Restrictions _ Run Parameters _ Twain Scanning Users	( <sub>ل</sub>
F3 =Exit	Enter =Continue
M <u>A</u> D	

5. F10 = Add User

<u>User's Pop Que</u> X=Select Position To: <u>X</u> <u>User</u> KIMAP MCKENZY MONTY	<u>Description</u> KIMBERLY IN ACCOUNTING MCKENZY'S POP A QUEUES MONTY'S QUES TO POP	<u>ght RVI 1992, 1999</u> RVPQMFM/SFLCTL
F3 =Exit	F10 =Add User	Bottom Enter =Continue

6. Enter the IBMi host system user id and description then press enter.



7. F10 = Add Next Entry

To change an existing entry, select that entry with an **X**. Press to continue.

<u>User's Pop Queues Maintenan</u> User	MAC COURT DOC	Copyright RVI 1992, 1999 
Position To Sequence Numbe Type Option, Press Enter X =Maintain This Entry B =Insert An Entry Before	— O =Move This Entry A =Insert An Entry After	D =Delete This Entry
Opt <u>Sequence</u> <u>Routing Pr</u>	0111e	
Page Up =Previous Page F3 =Exit	F10 =Add Next Entry	Page Down =Next Page Enter =Continue

8. Specify a routing profile.

F8 permits the user to select Routing Profiles from a list. Press *enter* to continue.

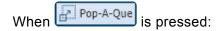
User's Pop Queues Mainter	ance	(c)Copyright RVI 1992, 1999 RVUS2FM/FORMAT2
User: Sequence:		
Routing Profile: Delete Code:	MCKENZY (D=Delete)	F8 To Select
F3 =Exit	F12 =Cancel	Enter =Continue

Repeat Steps 7 – 8 as needed.

User's Pop Queues Maintenanc	e (c)	Copyright RVI 1992, 1999
User MAC	MAC COURT DOC	RVUS2FM/CATLSTCT
Position To Sequence Number	: 00	
Type Option, Press Enter		
X =Maintain This Entry		D =Delete This Entry
B =Insert An Entry Before		1
Opt <u>Sequence</u> <u>Routing Pro</u> 00 MCKENZY	file	
00 HCKENZI		
Page Up =Previous Page	F10 =Add Next Entry	Page Down =Next Page
F3 =Exit		Enter =Continue

For those users enrolled with a Pop-A-Que Routing Profile, will be available during workbasket inquiry.





- If the user is set up with multiple Pop-A-Que entries, a selection list will be presented.
- If the user is set up with only one Pop-A-Que entry, the queue will automatically pop.

## 6.2. Maintenance

The maintenance functions are being updated. Please check back to find out more about new One Look maintenance functions. Those functions not currently in the One Look Maintenance tab must be performed through the IBM i green screen interface.

1. Select Maintenance from the Menu drop down list.



### 2. Login to the Maintenance menu.

e Look Maintenance 🛞		
	Real Vision Software	
	User ID:	
	Password:	
	© Real Vision Software	👼 Log In

One Look maintenance menu allows maintenance for System Codes, Security, Document Tabs, Email, Scanning, Work Baskets.

Menu Maintenance	~
🗍 Sign Off	
SYSTEM MAINTENANCE	
MAINTAIN SYSTEM CONTROL FILE PARAMETERS	
MAINTAIN IMAGE SYSTEM DESCRIPTIONS AND KEY FIELDS	
SECURITY MAINTENANCE	
MAINTAIN OPTION SECURITY BY USER	
INDEX LEVEL SECURITY	
MAINTAIN USER SECURITY	
DOCUMENT TABS MAINTENANCE	
MAINTAIN DOCUMENT TYPES	
MAINTAIN DOCUMENT TAB PROFILES	
MAINTAIN DOCUMENT TAB GROUPS	
EMAIL MAINTENANCE	
MAINTAIN EMAIL ADDRESS BOOK	
SCANNING MAINTENANCE	
MAINTAIN SCANNING PROFILES	
WORK BASKET MAINTENANCE	
MAINTAIN ROUTING PROFILES	
MENU SECURITY MAINTENANCE	
MAINTAIN MENUS	

## 6.3. Custom Menus

Access custom menus specific to your organization. For details and pricing on Custom Menu setup and integration contact <u>RVI Support</u>.

If Custom Menus do not exist for your organization, you can exclude users from seeing the Custom Menus option.

From the One Look Maintenance Menu, select **Maintain Option Security By Users**, **Add User Option Security**. Create an entry by User Id or \*PUBLIC for Option Code Z (Custom Options) to be *Excluded* to remove the Custom Menu's option from the One Look dropdown Menu.

Menu Maintenance «	Maintain Option Sec	curity by User		
🗍 Sign Off	🚫 Close 🕒 Add U	Jser Option Security		
	User Profile	System ID	Option	Include/Exclude
SYSTEM MAINTENANCE	MCKENZY			· · · · ·
MAINTAIN SYSTEM CONTROL FILE PARAMETERS	MCKENZY		Z ~ Custom Options	E
MAINTAIN IMAGE SYSTEM DESCRIPTIONS AND	PICKENZT		2 ··· Custom options	2
SECURITY MAINTENANCE				
MAINTAIN OPTION SECURITY BY USER				
INDEX LEVEL SECURITY				
MAINTAIN USER SECURITY				
DOCUMENT TABS MAINTENANCE				
MAINTAIN DOCUMENT TYPES	•			
MAINTAIN DOCUMENT TAB PROFILES				
MAINTAIN DOCUMENT TAB GROUPS				
EMAIL MAINTENANCE				
MAINTAIN EMAIL ADDRESS BOOK				
SCANNING MAINTENANCE				
MAINTAIN SCANNING PROFILES				
WORK BASKET MAINTENANCE				
MAINTAIN ROUTING PROFILES				
MENU SECURITY MAINTENANCE				
MAINTAIN MENUS		To exclude a specific Option Code Z is set t		C), create an entry where
User Id: MCKENZY © Real Vison Software. All Ri	g	Space of Source in Sect		al Vison Software. All Rights Reserved.

## 6.3.1. Setup Custom Menus

When a customer specific menu option is created, it must be setup as follows in order for it to appear in One Look under *Menu, Custom Menus*.

- 1. From an IBMi command line, with RVILIB in your library list, type GO IMAGE.
- 2. Option 8 Maintenance Menu.
- 3. Option 14 Maintain RVI Customer Specific Menu.
- 4. Put an **X** next to the option. (If you need to create an option, use **F9** = Add Option.)

X=Maintain		<u>aintenance Screen (</u> n Custom Menu Maintena	<mark>c)Copyright RVI</mark> ance RVMNUF	<u>1992,1999</u> MD/SFLRCD
M=Move Copy/Mov <u>X Seq</u> <u>To Seq</u> _ 1 <u>X</u> 2		live	<u>Secured?</u> Y	<u>Enabled?</u> Y Y
Put an X next t	o an existing reco	rd OR create a new reco	ord using F9 = Add	l Option
F3 =E×it	F8 =ReSequence		:Test User :Print Enter =Co	+ ontinue

- 5. Press **F5** = Maintain User Security
- 6. Add user id **QTMHHTTP** as well as any user id(s) that will access this menu option.

Real Vision Customer Specif		,1999
	Custom Menu Security Copyright RVI, 1999 RVMNUUFD/TSUBCTL	ECUPD
Option <b>#: <u>2</u></b> Menu Option	Seq#: 2 Desc: IMAGE CLEANUP -	sts.
Option Enabled?: <u>Y</u> (Y/N) Setting Enabled To N Will Re Press F5 If Security By User	Users: Pos To:	ity.
Command To Execute (F4 To Pr <u>call CLNUPSYSIZ</u>	QTMHHTTP MCKENZY	e):
	To Add a customer specific menu option in One Look:	
	1. Add user QTMHHTTP	
	F3 =Exit2. Add the user id(s) that will have access to this menu option.	
F3 =E×it F5 =Maintai	7 n User Security     F23 =Delete   Enter =Co	ntinue

### The setup is complete!

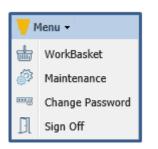
### Users specified in Step 6 will see the option when then select *Menu, Custom Menus* from One Look.

WorkBasket       Image: WorkB	М .	1enu 🔻			
Custom Menus	╈	WorkBasket			
	<i>3</i> 7	Maintenance			
Change Rassword	Ξ	Custom Menus			
Change Password		Change Password			
Sign Off	Dl	Sign Off			

Customer Specific Programs		×
🛞 Close		
Custom Menu Option	Program Name	
IMAGE CLEANUP - SYSTEM Z	CLNUPSYSIZ	

## 6.4. Change Password

1. Select Menu, Change Password.



2. Enter a valid password.

(**Password Parameters**: Up to 128 bytes. Allows for mixed-case, numeric, alpha, alphanumeric, and special characters. Can't begin or end with a whitespace character.)

Image Inquiry	×
Change User Password	Venu 🗸
Sign In Required after Change Enter Password: Re-Enter Password:	
	🕢 Submit 💋 Cancel

## 6.5. Sign Off

Select Menu, Sign Off then close the browser.



# 7. IMAGE INQUIRY TOOLBOX

One Look offers a variety of tools and menus to accomplish tasks within the RVI system. For quick and easy access, many options such as notes, email, and image details are available in multiple locations throughout One Look.

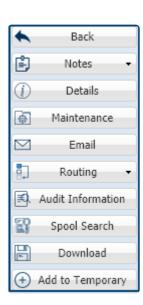
### Help & Settings



### Navigation & Appearance

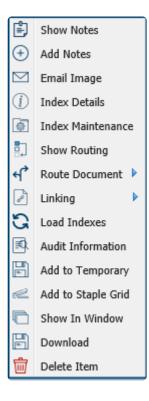
Page 1	of 1 🕨 🕅	Displaying 1 - 75 of 75	🛐 Retrieve Request	Display Checked	📕 Display Options 🗸

#### **Display & Left Side Functions**



•	Back
Ê	Notes 👻
1	Details
ø	Maintenance
$\square$	Email
•	Routing 👻
£	Audit Information
æ.	Stapling
ø	Linking
Ð	Append Scan
Ħ	Add Redaction
B	Download
Ð	Add to Temporary
6	Display Temp Grid
	Retrieve Request

#### Inde List & Right Click Menu



## 7.1. Help & Settings

To watch a video on this topic CLICK HERE

(Located in the top right-hand corner of the search results window in Image Inquiry.)



Settings: Sets session preferences including grid views and date/numeric formatting.

One Look						
Image Inquiry		<	Awaiting System Selection	0?#		
Total Systems:	38		I 4 Page 0 of 0 ▶ ▶ 2 No data to display	Display Checked 📃 Display Option: Settin		
System 🔺	System Name					
Α	AP WORKFLOW SYSTEM	~				
В	BANKING DDA SYSTEM		*** Ready to Search ***			
с	COURT SYSTEM					

To access the session settings:

## 1. After login, select the icon in the top right corner of the One Look window.

mage Inqu	uiry	~	Awaiting System S	election		0?#
Total Syste	ems: 38	^	A A Page 0	of 0 🕨 🕅 🧬 No da	ta to display	Display Checked 📃 Display Options 🗸
System 📥	System Name					
Α	AP WORKFLOW SY					
в	BANKING DDA SYSTEM				*** Ready to Search ***	
с	COURT SYSTEM					
D	AP SYSTEM					
E	AR SYSTEM					
F	BANKING LOAN SYSTEM					
G	ARKANSAS STATE TRE					
н	MEDICAL SYSTEM					
I	INSURANCE SYSTEM					
J	NET DATA CASE IMAG					
к	BUNZEL TEST IMAGE					
L	PERSONAL PROPERTY					
м	MASTER IMAGE SYSTEM					
0	ACCUFUND ACCOUNT					
Р	ACCUFUND A/R SYSTE					
Q	ACCUFUND REQUISIT					
R	SIGNATURE DOCUME	V	(PDF)	Device Id:\$00105335	User Id: MCKENZY	© Real Vison Software. All Rights Reserved.
c	ACCUEUND DUDCHAS		(1017		OF A THE CHET	© real faor outral of highs reacted

2. The session settings window will display.

Session Settings				×
© Real Vison Software. All Rights Reserved.				Version 6.26.19
Grid Type	Regular	🔘 Tabbed	🔘 Tree	
Remove Date Formatting	📃 On/Off			
Remove Numeric Formatting	📃 On/Off			
Combine PDF	🔽 On/Off			
Socket Support	📃 On/Off			
RVI to Viewer	📃 On/Off			
RVI to Internet Viewer	📃 On/Off			
Polling	🔽 On/Off			
Polling Interval (Seconds*)	0		-	
Hide West Region after Search	📃 On/Off			
Display AS400 Spool Format	📃 On/Off			
Items Per Page	<ul> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> <li>On/Off</li> </ul>		~	
'Temporary Grid' and 'Show in Window' initial window size:	Normal		*	
🛞 Clear Cookies				⊘ Save Settings

### Available Options:

### 1. Grid Type

Controls the look of the index list in the right window pane.

### • Regular

Displays the index list based on create date.

	F-B	ANKING LOAN S	YSTEM		0 ? ¢		
Index Search Venu -		Page 1	of 1 🕨 🕅 🍣 Displaying	olaying 1 - 4 of 4 Display Checked EDis			
F-BANKING LOAN SYSTEM 📃 Change System		Flags	VENDOR	DATE	DOCUMENT TYPE		
VENDOR		riays	×	×	×		
DATE		N	1909	12/21/2011	HOUSE PHOTOGRAPH		
			1909	12/22/2011	FINANCIAL STATEMENT		
DOCUMENT TYPE		N	1909	12/22/2011	LOAN APPLICATION		
From Date 🖸 To Date			1909	12/25/2011	INCOME XLS		

### • Tabbed

Displays the index list based on document tabs.

mage Inquiry 🔍	F-BANKING LOAN	YSTEM		0 ? \$
Index Search Venu •	4 4 Page 1	Display Checked EDisplay Options -		
F-BANKING LOAN SYSTEM System	Flags	VENDOR	DATE	DOCUMENT TYPE
VENDOR	riags	×		×
DATE	TAB: COLLATER/	NL.		
DOCUMENT TYPE	N	1909	12/21/2011	HOUSE PHOTOGRAPH
From Date 🖪 To Date 🖪	G TAB: FINANCIAL	INFORMATION		
		1909	12/22/2011	FINANCIAL STATEMENT
🔾 Search 🔄 Functions 🗸 🖉 Clear		1909	12/25/2011	INCOME XLS
	TAB: LOAN INFO	RMATION		
	N	1909	12/22/2011	LOAN APPLICATION

### • Tree

Displays the index list in an expandable tree format starting with index 1.

Image Inquiry «	F-BANKING LOAN SYSTEM	070
Index Search Venu •		Display Checked 📃 Display Options 🗸
F-BANKING LOAN SYSTEM Change System VENDOR DATE C DOCUMENT TYPE From Date To Date C Search Search Clear		× NOTOGRAPH PHOTOGRAPH L STATEMENT LICATION NPPLICATION XLS
	(PDF) Device Id:\$00105970 User Id: MCKENZY	© Real Vison Software. All Rights Reserved.

### 2. Remove Date Formatting

Removes the requirement for users to enter a specific date format during image inquiry, scanning, and indexing.

#### 3. Remove Numeric Formatting

Removes the requirement for numeric data in numeric only fields during image inquiry, scanning, and indexing.

#### 4. Combine PDF

Allows the user to que up and view multiple images as a single PDF. The Image ID: will show "Combined Image" in the bottom left corner of the display window. Combine PDF will be enabled by default.

mage Inquiry «	Sack	VERIFICATION OF INFORMATION OF INILITARY PERSONNELL NAME AND ADDRESS OF SOMEONE WHO GAY CONTACT YOU AT ALL TIMES. TO VERIFY ANY AND ALL CHOOSES (TO YOUR ACCOUNTS) THAT THEN RETINUTION HAS RECEIVED ON YOUR BEDWAF
Index Search Venu -	Email	VERIFICATION OF IDENTIFICATION: "Form of Munification provided
F-BANKING LOAN SYSTEM I Change System	Download	"laterification verified through:* laterification verified through: Name and Address of somere who will always know your location:     □ Get Little Address of somere who will always know your location
VENDOR DATE DOCUMENT TYPE From Date To Date Search Functions Clear		SECTION 8- INFORMATION REGARDING. JOINT APPLICANT OR OTHER PARTY Compares any if to part out, builds, and another an ender the section of the sectin of the section of the section of the section of the section of
[24] 24일 24일 24일 24일 25일 25일 25일 25일 25일 25일 25일 25일 25일 25		SECTION G: CREDIT DISCLOSURE FOR INSURANCE (applicant copy)

#### 5. Socket Support

Allows the user to turn the socket on/off when using IE. Chrome will always have socket control enabled so the user does not have the option to turn it off. *(To save the user's selection, Cookies must be enabled.)* 

### 6. RVI to Viewer

Forces the display of images into the RVI PC Viewer.

**RVI PC Viewer** 8.1.14xx or higher must be installed locally on the pc.

### 7. RVI to Internet Viewer

Forces the display of images within the Internet Explorer frame within the One Look window. (<u>RVIINET</u> download must be setup.)

nage Inquiry 《	K Back	Б ↓ ↔ ∞ ₩ 🦛 🖗 И ∢ ≻ И 🔤 📾 🔨
index Search 💎 Menu 🗸	Notes •	
F-BANKING LOAN SYSTEM 📃 Change System	① Details	PERSONAL FINANCIAL STATEMENT
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🔍 Search 🛛 🔀 Functions 🗸 🖉 Clear	Append Scan	
	Download	Text         200 m         Text         Text <thtext< th="">         Text         Text         <th< td=""></th<></thtext<>
	+ Add to Temporary	Arman 40 CL SOLDER THE
		Training Special Sec. 2006 Nation International Sectors Sector
i		Texanan texan any Texanan Texan and Texanan Texan and Texanan Texan and Texanan Texanan and Texanan an
		ABCH         Conf.decating         2/0,160         Destination (or resolution)           Grands (decating)         2/0,160         Destination (or resolution)         Destination (or resolution)           Grands (decating)         2/0,160         Destination (or resolution)         Destination (or resolution)
		Like transmit (Defending )
		Increased (Increde II)     Increased (Increde II)     Increased (Increde III)     Increde III)     Increde III     Incred     Increde III     Incred     Increde III     Incred     Incre
		Profit Straining & Fernance (Scherbell 1) Margages on Other Head Databia (Scherbell 1)
		Advecter Account indue We Acco (doester) Taxee Advecter (Secter 26/0 / AccOunt 20,000) Distribution (Secter)
		2011 (1115 40.00)
		Der rear Dereit
		Total 5 0
		Total 5 ZGD 000 (num American tast Intelling) Net Worth 5 6
		PETer COFEDING, Paperol
		Ready Page 1 of 1 BAAAAAAS.001 REAL VISION SOFTWARE, INC
	Image ID:FAAAAAAE	Web Application Version 8.0 ©Copyright 2006 Real Vision Software, Inc.

### 8. Polling

Check/Uncheck this option to enable/disable the polling function from running. This only applies to users set to <u>Type O or P</u> as their Image Viewer configuration on the IBMi.

#### 9. Polling Interval

When Polling is enabled, use the slider bar to set the polling interval in seconds.

#### 10. Hide West Region after Search

After clicking the Search button in Image Inquiry, the Index Search pane will minimize leaving the list of results maximized across the screen.

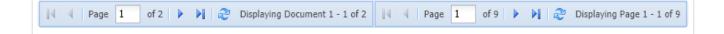
И			h panel will minimi anel click the doubl			2	Retrieve Request 🛛 Displa	y Checked EDisplay Options
	-	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
	Flags		3	3	2	3	>	3
		241780	01/02/2018	J JARRED	T JARRED	с	MONTAGUE	DRAFT
	N	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLEMENTAL
	NRS	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT
	NL	241780	04/22/2017	J JARRED	T JARRED	с	MONTOGUE	PETITION
		241780	01/18/2018	J JARRED	T JARRED	с	J DOWNS	WORD

#### 11. Display AS400 Spool Format

Check/Uncheck this option to enable/disable the feature to bring up large spool files quicker by

breaking down spool files by document/page. If several spool files are selected and Display AS400 Spool Format is enabled, you will see 2 paging toolbars at the bottom of the screen. The left toolbar controls which document is being displayed. The right toolbar controls which page within the

document is being displayed. When using spool Search while Display AS400 Spool Format is enabled, the search will apply to ALL spool files that are queued up.



#### 12. Items Per Page

Lists up to the number of records set, before breaking the list into separate pages. The default value is 800.

#### 13. Temporary Grid and Show In Window initial window size

Sets the default size of the pop up window when viewing <u>temporary grid</u> or show in window. The default is 'Normal' with 'Maximized' and 'Height 100%, Width 50%' as options.

**RVI User Guide:** Displays the current One Look manual allowing customers to search on help topics and send comments to RVI customer service.

One Look									
Image Inquiry 🔍	Z-C	OURT D	OCUMENTS AND	EXHIBITS					@ <b>?</b> \$
Index Search Venu •	14		age 0 of 0		No data to displa	iy	Disp	lay Checked 📃 🛙	Display Or RVI User (
Z-COURT DOCUMENTS AND EXHIBITS		Flags	CASE #	FILE DATE 🔻	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
1									
FILE DATE					*** Ready	y to Search ***			

**Viewer/PDF:** Switches the PDF image display from the browser to the RVI PC viewer.

One Look								
Image Inquiry 🔍	Z-COURT I	DOCUMENTS AND	EXHIBITS					◎ ? ≠
Index Search Venu •	14 4	Page 0 of 0		No data to displa	У	Displ:	ay Checked 📃 🛙	Display Optior Viewer
Z-COURT DOCUMENTS AND EXHIBITS	Flags	CASE #	FILE DATE 🔻	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
FILE DATE				*** Ready	to Search ***			

## 7.2. Navigation & Appearance

To watch a video on this topic CLICK HERE

(Located above the search results window in Image Inquiry.)

	🛛 🖣 Page 1 of 1 🕨 🕅 🌮 Displaying 1 - 75 of 7	5 🖾 Retrieve Request 🕑 Display Checked 📃 Display Options 🗸
--	--	--

**Retrieve Request:** Manual information retrieval through a **CUSTOM INTERFACE** with the IBMi green screen used for One Look functions (View, Scan, Import, Upload) when polling or sockets is not used. Using the IBMi green screen, the user will navigate to and execute the **CUSTOM** function then press the Retrieve Request button from One Look to complete the request.

For example, the user takes the V-to-view option from the IBMi green screen to view a document then presses the Retrieve Request button from One Look to complete the request and display the document inside of the One Look frame.

Retrieve Request is typically used by customers experiencing performance issues, customers that do not want to run sockets, or customers not running DataQue code for polling.

Image Inquiry	*	z-c	OURT D	OCUMENTS	5 AND	EXHIBITS					070
Index Search	V Menu 🕶			Page 0	of 0	► N @ N	Io data to display	🔄 Retrieve R	equest 🔀 D	isplay Checked	Display Options -
Z-COURT DOCUMENTS AND EXHIBIT	TS 🗐 Change System		Elses.	CASE #		FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
			Flags								
FILE DATE							*** Ready	to Search ***			
PLANTIFF											
DEFENDANT											
CASE TYPE											
COURT/JUDGE		•									
DOCUMENT TYPE											
From Date 📑 To Date	2										
🔾 Search 🛛 🖓 Functions 🗸	🖉 Clear										
		(PI	DF)		D	evice Id:\$0011405	3 User Id: MCKE	ENZY	© R	eal Vison Software. A	All Rights Reserved.
						-					

Display Checked: View all documents selected with a check mark.

Index Search Venu -		P	age 1 of 1	🕨 🕅 🧬 Disp	laying 1 - 5 of 5 Ite	ems selected: 2 📴	Retrieve Request	Display Checked	Display Options -
Z-COURT DOCUMENTS AND EXHIBITS 🗐 Change System			CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
241780		Flags							
FILE DATE			241780	01/02/2018	J JARRED	T JARRED	с	MONTAGUE	DRAFT
PLANTIFF	E		241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLEM
DEFENDANT			241780	03/15/2017	J JARRED	T JARRED	c	MONTOGUE	GARNISHMENT
CASE TYPE		NL	241780 241780	04/22/2017 01/18/2018	J JARRED	T JARRED	c	J DOWNS	PETITION WORD
COURT/JUDGE	•		1.000	01/10/2010			-		
DOCUMENT TYPE									
From Date									

Under Settings (when <u>Combine PDF</u> is Enabled – Use the scroll bar to move between TIF and JPG documents. Use the arrows to move between OEM documents.

When Combine PDF is enabled, the Combine/PDF button will not appear.

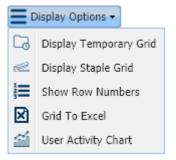
	• *	
Email	· [	
Download		
	24.200	
	CIVIL SUIT NUMBER 241 130 17 DIVISION ""	
	JONATHAN CHASE JARRED NINTH JUDICIAL DISTRICT COURT	
	VERSUS PARISH OF RAPIDES	
	TARA ST. ROMAINE JARRED STATE OF LOUISIANA	
	PETITION FOR DIVORCE AND OTHER RELIEF	
	where it remains to date.	
Combined Images	3.	
	Download	Download      EVIL SUIT NUMBER A DV

Under Settings , when <u>Combine PDF</u> is Disabled – Use arrows to move to the next document.

When Combine PDF is disabled, the Combine/PDF button will be active.

Image Inquiry 🔍	Back			^
Index Search Venu •	Email			< provide the community of the community
Z-COURT DOCUMENTS AND EXHIBITS	Combine/PDF			
241780	Download			8
FILE DATE	Add to Temporary			i i
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DEFENDANT		JONATHAN CHASE JARRED	NINTH JUDICIAL DISTRICT COURT	
CASE TYPE		VERSUS	PARISH OF RAPIDES	
COURT/JUDGE		TARA ST. ROMAINE JARRED	STATE OF LOUISIANA	
DOCUMENT TYPE		PETITION FOR	DIVORCE AND OTHER RELIEF	
From Date  To Date		The petition of JONATHAN	CHASE JARRED, of the full age of majority and a	
🔍 Search 🛛 🖓 Functions 🗸 🖉 Clear		resident and domiciliary of Rapider	Parish, Louisiana, with respect represents:	
			1.	
		TARA ST. ROMAINE JARR	ED, domiciled in Pineville, Rapides Parish, Louisiana,	
		is made defendant herein.		
			2.	
		The petitioner and defendant	t were married on or about June 23, 2010, in Rapides	
			nediately established their matrimonial domicile and	
		where it remains to date.		
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## **Display Options**



• **Display Temporary Grid:** Populates a grid at the bottom of the screen showing a list of documents that have been added to the temporary holding area. From the holding area, users can view documents which allows for comparison of documents across different systems. (*The temporary grid is cleared automatically when the user logs off.*)

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• **Display Staple Grid:** Displays the Staple Grid allowing the user to see the items waiting to be stapled and to finalize the staple process as well as maintain existing staple bundles. (*The staple grid is cleared automatically when the user logs off.*)

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• Show Row: Displays the numerical row number next to each record.

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• Hide Row: Hides the numerical row number next to each record.

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• **Grid to Excel:** Display a list of the One Look sub file indexes in Excel. Also, used in <u>spool file search</u> to display spool file reports in Excel.

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• User Activity Chart: Includes User Audit and Scan Audit tabs. The User Audit is a graphical representation of the user's activity by System Code including View, Email, Print, Route, Change Index, and CD activity based on the selected date. The Scan Audit is a graphical representation of the user's scan activity including Direct Scan and manual Upload Scan activity based on the selected date.

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User Audit Tab:





## Scan Audit Tab:





## 7.3. Display Options Ribbon

(Located on the left-hand side of the document display window in Image Inquiry.)

The available options will depend upon the type of document being viewed and the established security.

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1	Details	
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£1. /	Audit Information	The Append Scan button is only available when displaying scanned images.
2	Stapling	
ø	Linking	The Stapling and Linking buttons will only appear when the document in the window has
÷	Append Scan	been stapled or linked to other documents.
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B	Download	
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**Back:** Returns to the search results of the last image inquiry. You can change your search or choose to view another item from the current list.

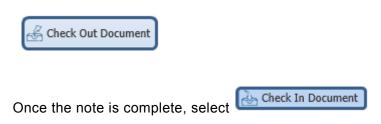
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Z-COURT DOCUMENTS AND EXHIBITS I Change System 241780		Details     Maintenance	II. That your petitioner desires to amend his Petition for Divorce and Other Relief by adding paragraph 19 to read as follows:		
FILE DATE PLANTIFF DEFENDANT CASE TYPE	1	Email Conting Conting Contine	-19. The defendant has receively exhibited volatile and erratic behavior and mood swings and your petitioner shows that it would be in the best interest of the children for the Court to order a psychological evaluation of both parties by a mental health professional selected by the Court, and that this would be in the best interest of the children."		
COURT/JUDGE DOCUMENT TYPE From Date Court State Court	1	Add to Temporary	<ul> <li>WHEREFORE, YOUR PETITIONER PRAYS:</li> <li>1. That this amended pleading be deemed good and sufficient and be ordered filed.</li> <li>2. That the prayer of the petitioner's original Petition for Divorce and Other Relief is reiterated not reaffirmed, save and except as may be inconsistent herewith:</li> <li>3. That al elegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and</li> <li>4. For all necessary orders and decrees.</li> </ul>		
		Image ID:ZAAAADKS		~	

**Notes:** Add notes or view existing notes for the document being displayed. When notes exist, the Notes drop down icon will be red. (*Show Notes will only appear if the document already has notes.*)

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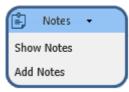
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Add Notes		
🐼 Submit	🖧 Check Out Document	🖉 Cancel

When adding notes, the record can be 'checked out' to ensure no conflicts occur between multiple users attempting to add notes to the same document.



#### Once a Note is Added:

• The option to Show Notes will be available.



• When notes exist, the system will display 'N' next to the record.

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**Details:** Shows the details (*filename, path, page count, create date*) of the document being displayed.

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This information is helpful for troubleshooting. Use this information to identify the filename and location of the file when reporting problems to RVI Support.

Maintenance: Allows the updating of index values and the deletion of the record.

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**Email:** Provides an email dialog box with the image automatically attached. An email contact list will appear with those email addresses that have been setup on the server.

Options Processing
Email Image
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CC:(EMAIL ADDRESS)
COURT DOCUMENT
UPDATED COURT DOCUMENT FOR CASE XYZ,234
SUPPORT@REALVISIONSOFTWARE.COM
⊲⊠ Send Email 🔗 Cancel

The **IBMi Email Server** must be running on the IBM i server.

**Routing:** Sends the document to another user/profile based on the routes setup on the IBM i server. (*The routing profile is setup by your system administrator.*)

Index Search Menu -   Z.COURT DOCUMENTS AND EXHIBITS   241780   FILE DATE   PLANTIFF   DEFENDANT   CASE TYPE   COURT/JUDGE   DOCUMENT TYPE   From Date   To Date   Download   Image ID:ZAAAADKS   Index Search WerkerSoft, YOUR PETTIONER PRAYS: Image ID:ZAAAADKS	mage Inquiry 🔍	Back	the second se	^
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**Audit Information:** Provides the ability to view all activity for the document being viewed. *Available filters: View, Print, Email, Change, Route, Fax, CD, Signature* 

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**Stapling:** Allows for the automatic grouping of images into a bundle. The bundling process occurs at scanupload time or during batch-indexing. This option displays a list of the images that are stapled to the primary document. (*The staple profile is setup by your system administrator.*)

#### If the primary document is stapled to another image:

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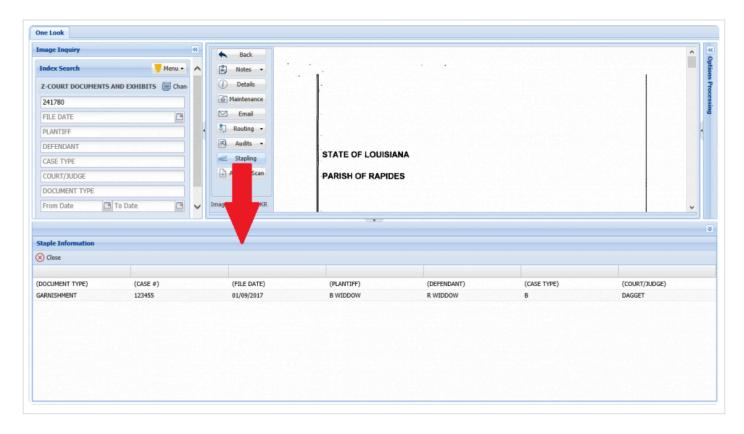
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• Click the Stapling button to see a list of the documents that are stapled to the primary document. Double click the record to view the stapled documents.



**Linking:** Provides the ability to establish a primary document with a link to other documents in different RVI imaging systems. This option assumes that if the user has security to the HR system that they also have security setup for the employee payroll system. (*The linking profile is setup by your system administrator.*)

For example, the primary document in HR could have a link to a document in the employee payroll system.

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**Append Scan:** Adds pages to the end of an existing image. The scan process is automatically initiated when the Append button is selected.

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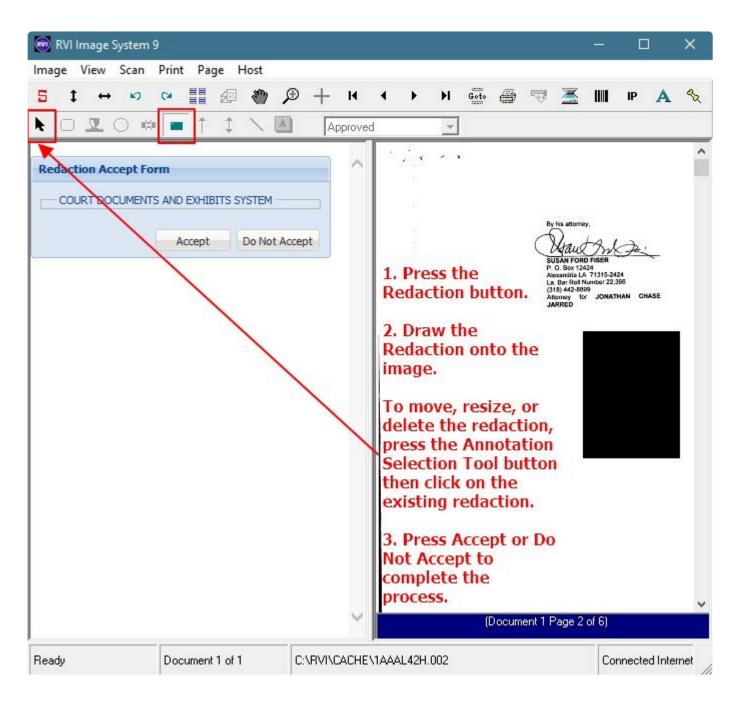
Add Redaction: Redact an area of an image using an opaque highlighter.

Redaction requires a special security setup and use of the RVI PC viewer. Only black & white scanned documents can be redacted.

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Once the image is displayed in the RVI PC Viewer, select the Redaction button then draw the redaction(s) onto the image. When complete, Accept or Do Not Accept the changes. The image will automatically be uploaded.



**Spool Search:** Allows for searching a spool file report based on multiple search criteria. This option will only be active when viewing a spool report (Image Type = T).

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The results of the search can be displayed in PDF or Grid format.

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**Download:** Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.

Add To Temporary: From image inquiry, temporarily store then view documents from any authorized system. The temporary storage folder is accessed through the Display Temp Grid button or Display Options, Display Temporary Grid in the upper right corner of the One Look Image Inquiry window or click

Display Temp Grid located on the left side of the currently displayed document. Documents can be viewed as single files or combined into one PDF.

(The temporary grid is cleared automatically when the user logs off.)

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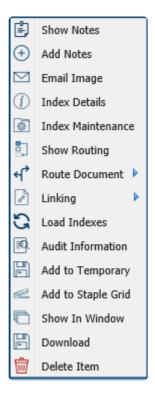
**Retrieve Request:** Manual information retrieval through a **CUSTOM INTERFACE** with the IBMi green screen used for One Look functions (View, Scan, Import, Upload) when polling or sockets is not used. Using the IBMi green screen, the user will navigate to and execute the **CUSTOM** function then press the Retrieve Request button from One Look to complete the request.

For example, the user takes the V-to-view option from the IBMi green screen to view a document then presses the Retrieve Request button from One Look to complete the request and display the document inside of the One Look frame.

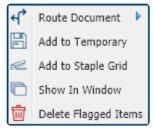
Retrieve Request is typically used by customers experiencing performance issues, customers that do not want to run sockets, or customers not running DataQue code for polling.

## 7.4. Index List & Right Click Menu

(Available by right-mouse clicking a single record in Image Inquiry.)



If multiple records are flagged, **Route Document**, **Add to Temporary**, **Add to Staple Grid**, **Show In Window**, and **Delete Flagged Items** will be the only available options.



**Show Notes:** Displays notes associated with an image. *If notes do not currently exists, the user will not get the Show Notes option.* 

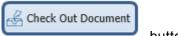
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FILE DATE				NR	241780	03/15/2017	J JARRED	T JARRED	С	MONTOGUE	FIRST SUP	IMAGE
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DEFENDANT				NL	241780 241780	+ Add Notes	)	T JARRED	c	MONTOGUE	PETITION	IMAGE
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0 MCKENZY	ATTORNEY R	ECEIVED	COPY	ON 1/4	/18.	Sector Sector Sector			010418		000000	

From the Notes Listing, users can Close or Delete notes by right clicking a record.

Notes Li	isting				
🛞 Close	e 🕂 Add Note Right click item f	for more o	options.		
Flags	User	2	Note	Entry Date	Close Date
0	MCKENZY	-	Close Note IVED COPY ON 1/4/18. Delete Note	010418	000000

Add Notes: Allows users to add notes to a document.

When a user is adding a note, the record can be checked out using the



button to

ensure that there are no conflicts between one or more users attempting to add notes to the same document.

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PLANTIFF			N	241780	03/15/2	J JARRED	T JARRED	с	MONTO	GARNIS	
DEFENDANT			N	241780	04/22/2	J JARRED	T JARRED	с	MONTO	PETITION	
CASE TYPE				241780	07/24/2	J JARRED	T JARRED	С	BEAR	PICTURE	
COURT/JUDGE				241780	07/24/2	J JARRED	T JARRED	с	BIRD	PICTURE	Submit 🛃 Check Out Document 🚠 Check In Document 🖉 Cano
				241780	07/24/2	J JARRED	T JARRED	с	MONTO	PICTURE	
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Once you complete the notes entry select



• When notes exist, the system will display a 'N' next to the record.

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		N	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLEMENT
PLANTIFF		NS	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT
DEFENDANT		NL	241780	04/22/2017	J JARRED	T JARRED	с	MONTOGUE	PETITION
CASE TYPE			241780	07/24/2018	J JARRED	T JARRED	с	BEAR	PICTURE
	. 🗆		241780	07/24/2018	J JARRED	T JARRED	с	BIRD	PICTURE
COURT/JUDGE			241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE
DOCUMENT TYPE			241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE
From Date 🔳 To Date			241780	07/30/2018	J JARRED	T JARRED	c	MONTOGUE	PICTURE IMPORT
			241780	01/18/2018	J JARRED	T JARRED	c	J DOWNS	WORD

**Email Image:** Provides an email dialog box with the image automatically attached.

Options Processing
Email Image
MDOUG@LAW.COM
M DOUGLAS
CC:(EMAIL ADDRESS)
COURT DOCUMENT
UPDATED COURT DOCUMENT FOR CASE XYZ,234
SUPPORT@REALVISIONSOFTWARE.COM
ा Send Email 🛛 🖉 Cancel

Index Details: Shows the details such as the filename, path, page count, create date.

COURT	DOCUMENTS	AND EXHIBITS						0?\$	Options Processing		
4 4	Page 1	of 1 🕨 🕅 🦂	Displaying	1 - 4 of 4 💽	Retrieve Reque	st 🕃 Display	Checked 📃 D	isplay Options -	Index Details		
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] NR	241780	03/15/2017	J JARRED			MONTOGUE	GARNISHM	IMAGE	FILE DATE:	03/15/2017	
NL	241780	04/22/2017	J JARRED	집에 집에서 가지 않는 것이 많이 많이 했다.		MONTOGUE	PETITION	IMAGE	FILE DATE.	03/13/2017	
]	241780	01/18/2018	J JARRED	Email Image		DOWNS	WORD	OEM	PLANTIFF:	J JARRED	
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			4	Route Docum	ient 🕨				COURT/JUDGE:	MONTOGUE	
			5	Load Indexes					DOCUMENT TYPE:	FIRST	
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				Download					CREATE-DATE:	2011/07/01	
									VIEW-DATE:	02/22/2016	
									PAGES:	004	
									DELETE:		
									NOTES:	Y	
									ROUTE:	Y	
									WORKBASKET USER:		
									CREATED BY USER:		
PDF)		Davica Id-±00	119236 User	Id: MCKENZY		@ Paal 15ee		Rights Reserved.	CHECKED OUT:	MONTY	

This information is helpful for troubleshooting. Use this information to identify the filename and location of the file when reporting problems to RVI Support.

Index Maintenance: Allows for the updating of index values and the deletion of the record.

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]	NL	241780	04/22/2017	J JARI	how Notes		MONTOGUE	PETITION	IMAGE	DEFENDANT:	T JARRED
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Show Routing: Shows the sequence, route, date, and time associated with the routing event.

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241780			Flags								
FILE DATE			NR	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLE	IMAGE
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	-	1			🗐 🗐	Information					
					B Add	to Temporary					
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( Close					C Show	v In Window					
User Sequence	Route			Routed From	I 📰 Dow	nload iti	al Time Routed	Date Routed To H	tere Time	Routed To Here	Unique Key
	"MANUAL			отмннттр	10/01/18	11:4	1:33	10/01/18	11:41	1:33	AAAADSK

### Routing Document: Route the document(s) by user id or profile.

Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT TYPE	TYPE
NR								1112
	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLE	IMAGE
N R S	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT	IMAGE
] N L	241780	04/22/2017	J JARRED	T JARRED	с	MONTOGUE	PETITION	IMAGE
]	241780	01/18/2018	JARRED	T JARRED	с	J DOWNS	WORD	OEM
		Index Maintenance     Route Document     Load Indexes     Audit Information     Add to Temporary     Add to Staple Grid     Show In Window     Download	Route To Use Route Using F					

Linking: List linked documents. If links do not exist, the user will not get the Linking option.

	Page	e 1 of 1 🕨 🕅	Displaying 1	- 9 of 9		Retrieve R	equest 🛃 Dis	play Checked 📃 D	isplay Optio
Flags		OAD# • ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES
LV		DEDDC11		DOC1			IMAGE	2018/09/01	006
L	Ð	Add Notes		DOC2			IMAGE	2018/10/31	001
RL	$\square$	Email Image	0000002	DOC4			IMAGE	2018/08/30	007
RL	1	Index Details	0000003	DOC5			IMAGE	2018/08/30	012
R L V	ø	Index Maintenance	0000004	DOC6			IMAGE	2018/08/30	016
L	÷٢	Route Document		DOC7			OEM	2019/04/03	001
RL	P			DOC8			IMAGE	2018/08/23	001
NRL			C-COURT SYST	D0C3			IMAGE	2018/08/28	006
RL	C 国	Load Indexes Audit Information	D-AP SYSTEM	121			IMAGE	2018/08/28	005
	E.	Show In Window							
		Download Delete Item							
	B								

Load Indexes: Uses the index values of the selected record to populate the index search pane.

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Z-COURT DOCUMENTS AND EXHIBITS E Change Syste	m	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT TYPE	TYPE
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		1	Show In Window	1						
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						exes will pop sociated with			ch screen wi	th the index
	(1	DF)		Device 1	d:\$00119236 User				Real Vison Software.	All Diable Deserved

Audit Information: Provides the ability to view all activity for the document being viewed.

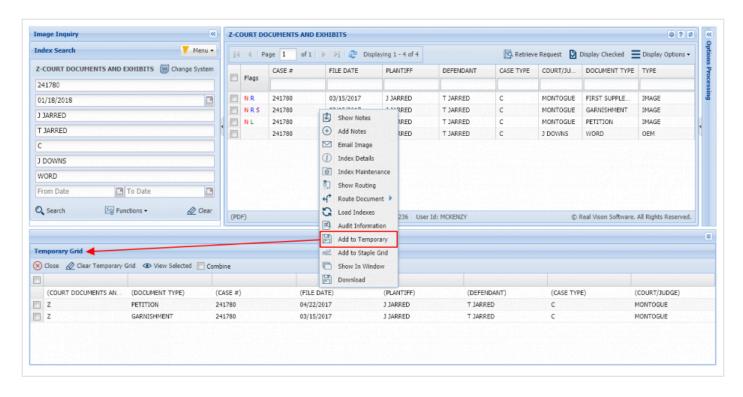
Available filters: View, Print, Email, Change, Route, Fax, CD, Signature

Back Qu	e Up For Approval	📔 Que Up Fo	r Batch Indexing 🛛 🔓	Pop-A-Que	e Records: 2		E Display (	Options 👻 🏄 We	orkbasket Charts 🗸
Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT	PRIORITY C	DAYS OLD
	201702	08/16/2017	M JOE	J LOU	с	DOUGLOUS	PETITION		0
	658966	09/12/2018	I JAMES	W REED	W	Q OSCAR	PETITION		0
Real Vision Image	Inquiry		Device Id:\$001	119421 Use	er Id: MCKENZY		© Real	Vison Software, A	All Rights Reserved.
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Close	ige 1 of 2		Displaying 1 - 25 of 4		iters 🗸	Date		Time	
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Close 4 Pa ser CHC TMHHTTP	Type VIEW VIEW VIEW VIEW VIEW VIEW			tina 💿 Vie Pri E-I () Ch () Ro () Fa: () CD	ew Request int Request Mail Request nange Request pute Request	01/29/19 03/19/19 03/19/19 03/19/19 03/19/19 09/12/18		14:49:56 14:46:53 14:47:06 14:47:10 14:48:43	

Add to Temporary: Temporary Folder provides a holding area where users can store a copy of any

document from any system to be used for temporary viewing and file comparison. The temporary folder is updated every time the user refreshes the page.

(The temporary grid is cleared automatically when the user logs off.)



**Maintain Staple:** Update an existing stapled bundle. *Only appears when the record you are selecting contains the primary stapled document.* 

Image Inquiry	Z-COURT	DOC	JMENTS AND EXHIBIT	15					0 ?
Index Search Ver	• 14 4	Page	1 of 1   > >	Displaying 1	- 4 of 4		🔄 Retrieve F	Request 🔀 Display Chec	ked 📃 Display Options 🕇
Z-COURT DOCUMENTS AND EXHIBITS 🔲 Change			CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
011319	Flag:	s							
04/24/2019			011319	04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT
K ILES			011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
	- S.		011210	04/24/2019	K ILES	O PAUL	E	W TIME	PETITION
O PAUL			Add Notes	04/24/2019	K ILES	O PAUL	E	W TIME	PIC
E			Z Email Image						
W TIME			Index Details						
DOCUMENT TYPE	-	1	Index Maintenance						
From Date To Date		+	📍 Route Document 🕨						
		*	Load Indexes						
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		E	Add to Temporary	The Maint	ain Stanlo onti	on annoars in t	hic ovample be	cause the record	that I have
			Maintain Staple					apled bundle. Th	
		6	Add to Staple Grid		r the Flags col		cument of a set	.preu bunarer m	
	1	R	Show In Window						
		E	Download						
		F							

Add to Staple Grid: Select a primary document then supporting documents from any system to the staple grid. Once all documents are in the staple grid the user can Finalize the staple process. Once the documents are stapled, if the primary document is viewed the system will automatically display the supporting documents that have been stapled.

	Page	1 of 1	L	🕅 ಿ Dis	playing	g 1 - 3 of 3		🔄 Reti	rieve Request 🛛 🔂 D	isplay Checked	Display Options
Flags	CAS	E #	F	ILE DATE	PLA	NTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T	ТҮРЕ
] ] NL ] L	2018		0 (=) (+)	1/18/2018 Show Notes Add Notes	D DI	RAKE AKE AKE	S DRAKE S DRAKE S DRAKE	E E E	J DOWNS M DOWNS M DOWNS	WORD PETITION PETITION	OEM OEM OEM
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(The staple grid is cleared automatically when the user logs off.)

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310069			Flags		×	1	×	× 📃 🗠 Display Staple Grid
OWNER:				310069	SMITH RONALD	124 SARCOXIE TOWNSHIP	01/08/2015	PHOT E Show Row Number
AG:				310069	SMITH RONALD	124 SARCOXIE TOWNSHIP	01/15/2005	SURV 🔀 Grid To Excel
		_ 1 0		310069	SMITH RONALD	124 SARCOXIE TOWHSHIP	02/27/2013	TREA 📹 User Activity Chart
TATUS:				310069	SMITH RONALD	124 SARCOXIE TOWNSHIP	03/11/2013	AUDITOR
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Delete Item: Delete the selected record from Image Inquiry.

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# 8. FUNCTIONS

**RVI** One Look provides the following functions:

Audit	Drag Drop	Email	<b>Fax</b> (Customer must have fax adapter installed.)
File Import	Image Index Maintenance	Image Markup	Linking
Notes	<b>OCR</b> (Customer must purchase OCR license.)	<b>Print</b> (IBM i direct print not included.)	Polling
Redaction	Routing	Scanning	Screen Scrape
Spool File Search	Stapling	Viewing	Workflow

### 8.1. Additional Index Filter

Select Functions, Additional Index Filter from the Index Search window.

Z-COURT DOCUMENTS AND EXHIBITS Change System
FILE DATE
PLANTIFF
DEFENDANT
CASE TYPE
COURT/JUDGE
DOCUMENT TYPE
From Date 🖸 To Date
Black/White Image Types       Image Types         Reports Image Types       Image Types         External Image Types       Image Types         Color Image Types       Image Types         Include Only Items Routed       Image Types         Include Only Noted Items       Image Types
🔍 Search 🖉 Functions 🗸 🖉 Clear
Scan Functions       Image: Constraint of the second

# narrow the search results by the following image types:Black/White

Provides an advanced index search allowing users to

- Reports
- External (such as Microsoft Office files)
- Color

Additional search criteria include:

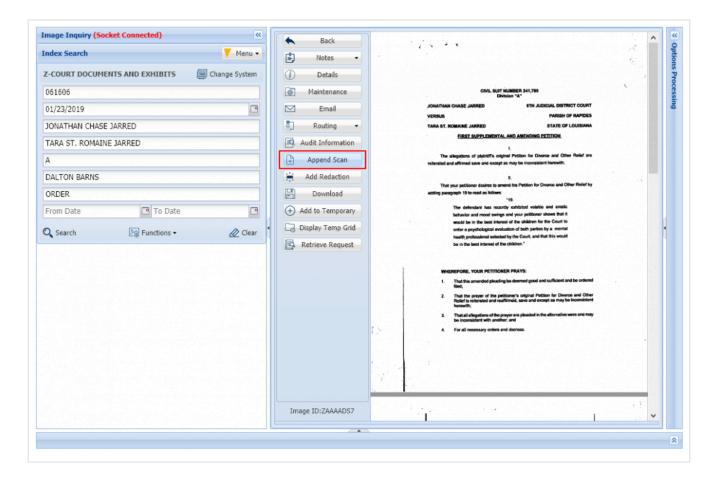
- · Routed Items
- Noted Items

### 8.2. Append

To watch a video on this topic CLICK HERE

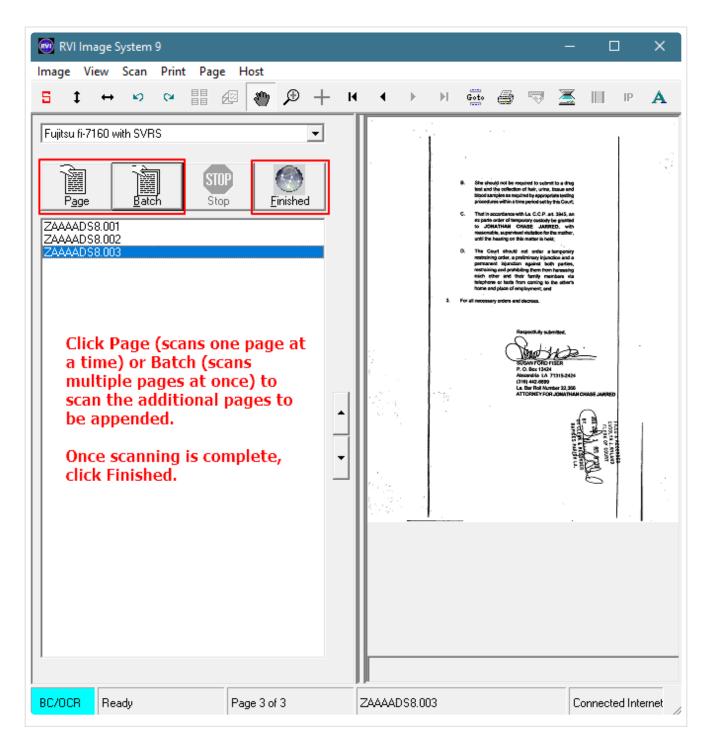
Scan additional pages to an existing image. (*Appends are not available for OEM documents such as PDF, DOCX, XLSX*.)

- 1. View an existing image.
- 2. Select Append Scan.

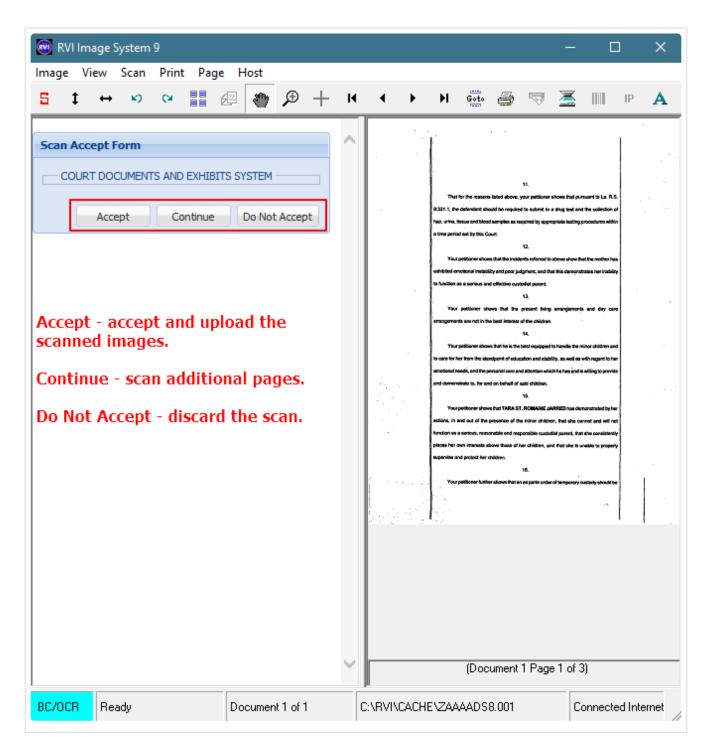


This will open the RVI PC Viewer. If the user is set to PC Control scanning, they will have to click Page or Batch to begin the scan process. If the user is set to host control, the scanning will automatically begin.

3. Click **Finished** when scanning is complete.



4. Click Accept, Continue, or Do Not Accept.



If the scan is accepted, the upload confirmation screen will open.

5. Click **OK** to complete the process.

阙 RVI Image System 9								—		×
Image View Scan P 5 \$ ↔ ↔ ↔	_	€ +	I4 4	•	► G	oto 🎯	<b>1</b>	<u>×</u>	IIII - I	Р А
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## 8.3. Audit

Audit is available in WorkBaskets and Image Inquiry.

WorkBasket Audit

To access the available audits, open the Workbasket tab by selecting Menu, Workbasket.

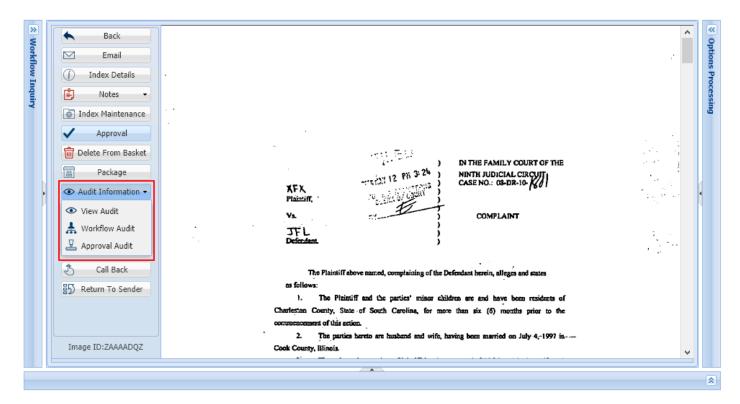
Click on the desired batch to be worked, then left-mouse click a record, select Audit Information to open the audit pane. Here you will find Audit Filters which allows the user to select the desired filter for the audit results.

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	Real Vision Image In	quiry		Device Id:\$001	119421 User		'	© Real	Vison Software. Al	ll Rights Reserved.
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Clo	t Information			Displaying 1 - 25 of 4			Date		Time	
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OR

Double-click a record to display a document. The audit options are found at the bottom left hand corner of the screen.



### 👁 View Audit

to display the audit information pane along with the audit filters option.

Audit Information				
Sclose	of 1 🕨 🕅 🥭 Displaying 1 - 8 of 8 🖌	Audit Filters -		
User	Туре	View Request n	Date	Time
MCKENZY	VIEW	Print Request	05/16/18	11:17:06
MCKENZY	VIEW	E-Mail Request	05/16/18	11:17:38
MCKENZY	VIEW	Change Request	05/16/18	11:21:05
MCKENZY	VIEW	Route Request	05/16/18	11:21:10
MCKENZY	VIEW	Fax Request	05/17/18	10:04:49
MCKENZY	VIEW	CD Request	05/17/18	10:45:43
MCKENZY	VIEW	Signature Request	05/17/18	10:45:44
MCKENZY	VIEW		06/06/18	10:10:19

### ⊗[‡ Workflow Audit

to display the workflow audit associated with the document being viewed.

WORKHOW AUGH	L'Information									
🛞 Close										
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail
MCKENZY	04/26/2018	12:27:25	* - Initial Route	AAAABUU	AAAACQ2		MCKENZY DEMO R	V - Image Inquiry	User-Selected Rout	X - Image Inquiry:
-										
Appr	oval Audit									
	ovarrana									

viewed.

Workflow Audi	Jorkflow Audit Information										
🛞 Close											
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail	
LEN	03/12/2018	13:24:57	K - Apprv/Disaprv	AAAABSY	AAAACMP	APPROVED	APPROVED	W - Workbasket In		- ADDITIONAL INF	
LEN	03/12/2018	13:24:58	K - Apprv/Disaprv	AAAABSY	AAAACMP			W - Workbasket In	Routing Rules Appli	R - ADVANCE TO N	
TERRY	03/27/2018	06:37:47	K - Apprv/Disaprv	AAAABSY	AAAACMQ	APPROVED	APPROVED	W - Workbasket In		- ADDITIONAL INF	
TERRY	03/27/2018	06:37:47	K - Apprv/Disaprv	AAAABSY	AAAACMQ			W - Workbasket In	Routing Rules Appli	R - ADVANCE TO N	
DAVE	03/27/2018	06:40:48	K - Apprv/Disaprv	AAAABSY	AAAACMR	APPROVED	APPROVED	W - Workbasket In		- ADDITIONAL INF	

### Image Inquiry Audit

To access the available audits, double click a record from the display pane sub file list. When the document is displayed, the user will be presented with the <u>Display & Left Side Functions</u>. Select the Audit Information button.

•	Back
È	Notes 🔻
1	Details
ø	Maintenance
$\square$	Email
<b>•</b> ]	Routing 👻
E).	Audit Information
2	Stapling
ø	Linking
Ð	Append Scan
<u>۽</u>	Add Redaction
B	Download
Ð	Add to Temporary
6	Display Temp Grid
2	Retrieve Request

The audit information frame will open below the displayed document.

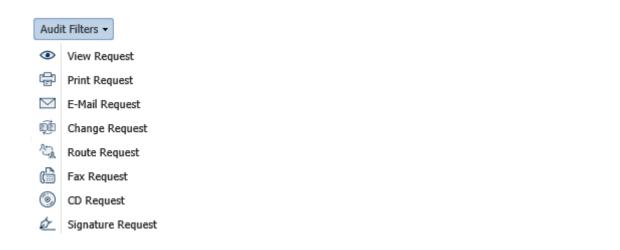
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Image Inquiry	(*)	Sack				3 ^
Index Search	V Menu 🗸	🖹 Notes	c	IVIL SUIT NUMBEF.		A .
Z-COURT DOCUMENTS	AND EXHIBITS	() Details		Division "A" 9TH JUDICIAL DISTRICT	CO.187	
658966		Maintenance	· VERSUS	PARISH OF F		
				STATE OF LO	UISIANA	12.1
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PLANTIFF		Routing		l. Intiff's original Petition for Divorce and Other R	, Infinit and	$h_{ij}$
DEFENDANT		🛋 Audit Information		nd except as may be inconsistent herewith;	ener ure	
CASE TYPE		Reapling		н.		- 14 B
COURT/JUDGE		Linking	That your petitioner des adding peragraph 19 to read a	sires to amend his Petition for Divorce and Other as follows:	Relief by	. •
DOCUMENT TYPE		Append Scan		-19.		
		7		has recently exhibited volatile and erratic ood swings and your petitioner shows that it		
From Date 🖪 To	Date 🖪	Add Redaction		best interest of the children for the Court to spical evaluation of both parties by a mental		
🔍 Search 🛛 🖄 Function	ns 🗸 🖉 Clear	Download	health profession	nal selected by the Court, and that this would terest of the childron.*		
• -•		+ Add to Temporar	be in the dest int	arest of the Grindren.		
		Display Temp Grid				
		Retrieve Request	WHEREFORE, YOUR	PETITIONER PRAYS: ed pleading be deemed good and sufficient and b	a ordered	
			filed;			
		Image ID:ZAAAADQ2	2. That the prayer Relief is reiterate becavith	of the petitioner's original Petition for Divorce a ed and reaffirmed, save and except as may be inc	onsistent	<b>~</b>
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QTMHHTTP	VIEW			03/19/19	14:46:53	
COURT	VIEW			03/19/19	14:47:06	

### Audit Information Options:

Audit Filters 🗸

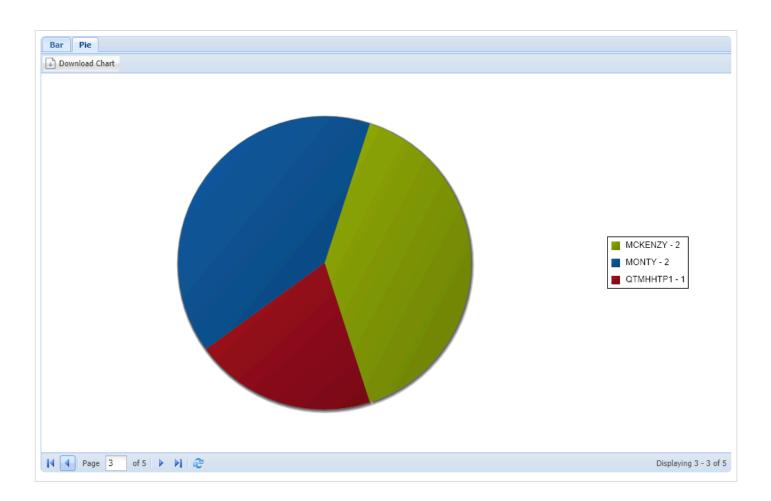
to select the desired request type to be queried. By default, the audit request type is set to

View Request.



🚈 Audit Charts

to access downloadable bar and pie charts depicting the audit results.



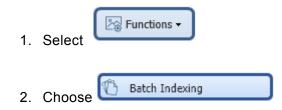


### Ø Workflow Audit

to display the associated workflow audit associated with the document being viewed.

🛞 Close										
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail
MCKENZY	04/26/2018	12:27:25	* - Initial Route	AAAABUU	AAAACQ2		MCKENZY DEMO R	V - Image Inquiry	User-Selected Rout	X - Image Inquiry:

## 8.4. Batch Indexing



3. Single mouse click the batch to be worked.

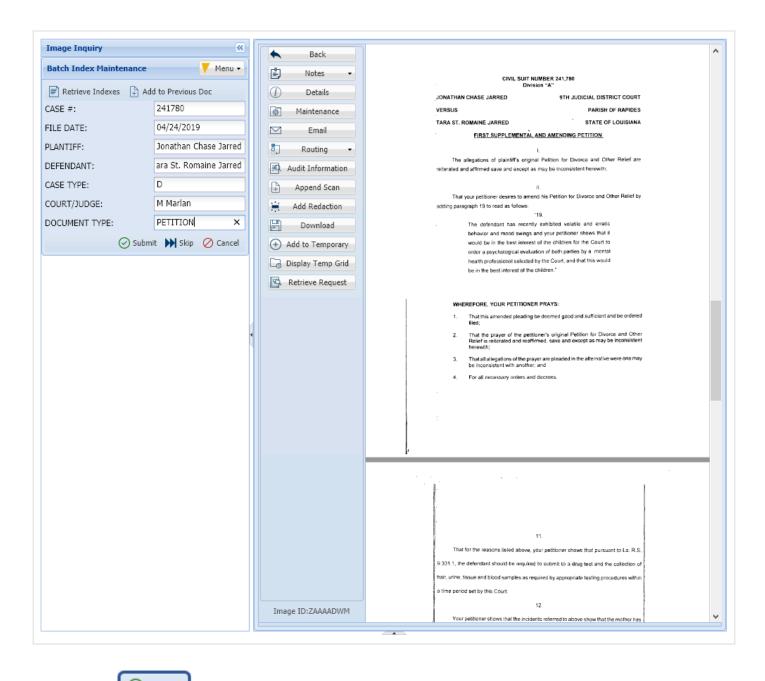
Image Inquiry 🔍								
Batch Index List 💎 Menu 🗸								
🗲 Back								
Batch Name	Count	Date						
MLF	00001	03/19/19						
114719	00001	04/29/19						
91419	00002	04/24/19						

4. Double click the first image in the batch.

To queue up the entire batch, click the box next to **Flags** to mark all records in the batch then select **Display Checked**.

Image Inquiry «			Z-C	Z-COURT DOCUMENTS AND EXHIBITS								
Batch Index L	ist	🔻 Menu 🕶		A P	age 1 of 1	▶ M & D	isplaying 1 - 2 of 2	🔄 Retrie	eve Request 🛛 🖸 🛛	isplay Checked	Display Options -	
< Back				-	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T	
Batch Name	Count	Date		Flags								
MLF	00001	03/19/19			91419	+					#001	
114719	00001	04/29/19			91419	+					#001	
91419	00002	04/24/19										

5. Index the image.





Submit to sa

to save the index values.

### OR

7. Click

Skip

to temporarily skip the current image and move to the next image.

## 8.4.1. Retrieve Indexes

Within Image Inquiry/Batch Indexing and WorkBasket/Que Up For Batch Indexing, the Retrieve Indexes button is used to retrieve index information from a customer specific database.

When Retrieve Indexes and Retrieve Request buttons are both present on the indexing screen, they can be used interchangeably. Either button will perform the index information retrieval from the customer database.

**Custom Feature** *Will only appear for customers specifically setup for this feature. Contact RVI Support for details on integrating this feature.* 

#### Image Inquiry:

Image Inquiry 🔍								
Batch Index Mainter	nance V Menu -							
📄 Retrieve Indexes	+ Add to Previous Doc							
CASE #:								
FILE DATE:								
PLANTIFF:								
DEFENDANT:								
CASE TYPE:								
COURT/JUDGE:								
DOCUMENT TYPE:								
	🕗 Submit 🕨 Skip ⊘ Cancel							

WorkBasket:

Workflow Inquiry	(*)
Batch Indexing	
📄 Retrieve Indexes 🗎	Add to Previous Doc 👔 Upload 🐼 Attach
INVOICE:	
ORDER:	
CUST. PO:	
CUSTOMER:	
SHIP TO:	
SHIP DATE:	
DOCUMENT TYPE:	
PLANT:	
BOL:	
Choose file:	Browse
	🕗 Submit 🕨 Skip 🔗 Cancel

## 8.4.2. Add To Previous Doc

Allows the user to append the image currently displayed to the previously indexed document. The current document will be appended and removed from the batch indexing queue.

This function is included in Image Inquiry/Batch Indexing and WorkBasket/Que Up For Batch Indexing.

Image Inquiry:

Image Inquiry		«
Batch Index Mainte	nance V Men	u 🗸
📄 Retrieve Indexes	🕂 Add to Previous Doc	
CASE #:	121915	
FILE DATE:		
PLANTIFF:		
DEFENDANT:		
CASE TYPE:		
COURT/JUDGE:		
DOCUMENT TYPE:	#001	
6	🕑 Submit 🔛 Skip ⊘ Can	cel

### WorkBasket:

Workflow Inquiry	×
Batch Indexing	
📄 Retrieve Indexes 📋 Ad	dd to Previous Doc 🕥 Upload 🐼 Attach
INVOICE:	
ORDER:	
CUST. PO:	
CUSTOMER:	
SHIP TO:	
SHIP DATE:	
DOCUMENT TYPE:	
PLANT:	
BOL:	
	Submit 🕨 Skip 🖉 Cancel

## 8.5. Batch Search

To watch a video on this topic <u>CLICK HERE</u>.

Batch Search is a searching method that allows you to search for multiple values in one index field (Invoice Number = 7531 or 7532 or 7533), or for multiple lines within one search (Customer = SMITH JOHN and Invoice Number = 7854 OR Customer = DERKINS SUSIE and Invoice Number = 7599).

In Image Inquiry, select Functions, Batch Search to open the grid.

Image Inquiry		~
Index Search		🔻 Menu 🗸
1-IMPORTED M	IQ DATA	Change System
LOAD#		
ORDER#		
PRO#		
DOC TYPE		~
INDEX 8		
INDEX 9		
From Date	To Date	
🔍 Search	E Functions -	🖉 Clear
	Scan Function	ons 🕨
	Drag Drop/I	mport Functions 🕨
	C Batch Index	ng
	OCR Word S	earch
	📇 Additional In	idex Filter
	Batch Search	n

When Batch Search is used, Image Inquiry *Index Search* criteria will be ignored.

There are 4 Batch Search options:

- 1. **Horizontal search using Finalize Search** updates the results screen with those records matching your search criteria.
- 2. **Horizontal search using Finalize W/Totals** updates the results screen with those records matching your search criteria AND provides a count summary corresponding to the individual

searches.

- Horizontal search using Finalize W/Totals & View updates the results screen with those records matching your search criteria AND provides a count summary corresponding to the individuals searches AND combines the results into a single PDF displayed in One Look.
- 4. Vertical search using Finalize Search updates the results screen with those records matching your search criteria.

### Horizontal Search:

Include an index record if:

- All indexes from Row 1 match
   OR
- All indexes from Row 2 match
   OR
- All Indexes from Row 3 match

Continuing through ALL Grid Rows.

### Example: Horizontal Search Using Finalize Search

Index Search		🔻 Menu 🕶			Page 1	of 1 🕨 🕅	🥭 Display	ying 1 - 4 of 4	Re	trieve Request	Display (	Checked 📃 Dis	play Options -
1-IMPORTED MIQ DA	rA 🔟 Cha	ange System		-	LOAD#	ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-D	PAGES
LOAD#				Fla									
ORDER#							8213826	BL			IMAGE	2015/04/22	001
PRO#							8214910	BL			IMAGE	2015/04/22	001
		×					8217198	BL			IMAGE	2015/04/22	001
DOC TYPE		×					8214910	MISC			IMAGE	2015/04/22	001
INDEX 8													
INDEX 9													
<b>E B I</b>	1-1												
An extra search crite	To Date ria has been enter Functions •	red	(PC	DF)		Device	Id:\$00125757	User Id: MCKI	ENZY		© Real Viso	on Software. All R	ights Reserved.
An extra search crite Q Search  E Batch Search Grid	Fria has been enter	red Giear			als 💿 Fina		•	User Id: MCKI	ENZY		© Real Visc	on Software. All Ri	ights Reserved.
Q Search     ∑       Batch Search Grid       ⊘ Close     ✓ Finalize Si	Fria has been enter	red Giear				Device lize W/ Totals &	•			NEX 8	© Real Viso	on Software. All R INDEX 9	ights Reserved.
An extra search crite Q Search E Batch Search Grid C Close  Finalize Se	eria has been enter	red Giear		W/ Tota			View			PEX 8	© Real Viso		ights Reserved.
An extra search crite	eria has been enter	red Giear		W/ Tota PR	D#		View			PEX 8	© Real Viso		ights Reserved.

Example: Horizontal Search Using Finalize W/Totals

				-IMPOR	TED MIQ DA	TA							0?4
Index Search		🔻 Menu 🔸		14 A	Page 1	of 1 🕨 🕅	🥭 Display	ying 1 - 4 of 4	💁 Re	trieve Request	Display	Checked 📃 Dis	splay Options 🗸
1-IMPORTED MI	Q DATA	Change System		Fla	LOAD#	ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-D	PAGES
LOAD#				Fia									
ORDER#							8213826	BL			IMAGE	2015/04/22	001
PRO#				3			8214910	BL			IMAGE	2015/04/22	001
DOC TYPE		~		3			8217198	BL			IMAGE	2015/04/22	001
INDEX 8							8214910	MISC			IMAGE	2015/04/22	001
							/						
INDEX 9						/	/						
From Date	📑 To Dat	e 🗖				/							
An extra search	n criteria has bee	n entered				/							
						/							
An extra search	r criteria has bee	n entered	(	PDF)		Device	Id:\$00125757	User Id: MCK	ENZY		© Real Viso	on Software. All Ri	ights Reserved.
				PDF)		Device 1	Id:\$00125757	User Id: MCK	ENZY		© Real Viso	on Software. All Ri	ights Reserved.
Q Search	E Functions +			PDF)	/	Device	Id:\$00125757	User Id: MCK	ENZY		© Real Viso	on Software. All R	ights Reserved.
Q Search Batch Search Grid	E Functions →	🖉 Clear			/		•	User Id: MCK	ENZY		© Real Viso	on Software. All Ri	ights Reserved.
Q Search Batch Search Grid ⊘ Close ✔ Fina	E Functions → d alize Search I Hor	🖉 Clear izontal 🗌 Vertical 🚺	Finali	te W/ To	tals Einz	alize W/ Totals & V	•		ENZY				-
<ul> <li>Q Search</li> <li>Batch Search Grid</li> <li>⊘ Close ✓ Fina</li> </ul>	E Functions →	🖉 Clear izontal 🗌 Vertical 🚺	Finali	te W/ To			•	User Id: MCK	ENZY	INDEX 5		Counts	-
<ul> <li>Q Search</li> <li>Batch Search Grid</li> <li>⊘ Close ✓ Fina</li> </ul>	E Functions → d alize Search I Hor	🖉 Clear izontal 🗌 Vertical 🚺	Finaliz PRC 821	te W/ To # 3826		alize W/ Totals & V	•		ENZY	INDEX 5		Counts 1	-
Q Search Batch Search Grid	E Functions → d alize Search I Hor	🖉 Clear izontal 🗌 Vertical 🚺	Finali PRC 821 821	te W/ To	tais Co Einz	alize W/ Totals & V	•		ENZY	INDEX S		Counts	-

Example: Horizontal Search Using Finalize W/Totals & View

Image Inquiry (He	ost Connected)	~		Back	28.64.2015 37:31-56 PAGE: 1 OF/DE 1	^	~
Index Search		🔻 Menu 🕶		Email	BILL OF LADING / CONNAISSEMENT		Optic
1-IMPORTED MIC	Q DATA	Change System		Download	SHIP FROM / EXPEDENDE BILL OF LADING NUMBER: 8213826 SAMSUNG ELECTRONICS AMERICA N° DE CONNAISSEMENT c0 Neovie Logistics (dissistanza)		Options Processing
LOAD#				<ul> <li>Add to Temporary</li> </ul>	6550 Milcreek Dr Mississauga ON LSN 883 CA		cess
ORDER#				Display Temp Grid	Tel. CARRIER / TRANSPORTEUR : Speedy Transport DISTRIBUTION CENTRALE L'TEE Audio Video Centrale TRALER NUMBER / Nº DE TRANSPORTEUR : Speedy Transport TRALER NUMBER / Nº DE TRANSPORTEUR : Speedy Transport		ing
PRO#				Retrieve Request	350 DES ERABLES BEAL NUMBER(s) / N° DE SCEAU: BK NUMBER(s) / N° DE SCEAU:		
DOC TYPE		~	1		LACHINE OC H83 2P9 CA Tel. 514-364-4980		1
INDEX 8					FREIGHT CHARGES BILL TO / FRAIS DE TRANSPORT IMPUTABLES A PRO NUMBER IN DE PRO: 6030710336 SCAC: BUPM FREIGHT CHARGE TERMS / TERMS DE FRET: (Prepaid)		
INDEX 9					PREPAID _X_ COLLECT SRD PARTY PORT PAYÉ À PERCEVOIR TROISIÈME CLASSE		
From Date	To Date	2			The Bit of Lating is welging to a Matter Service A systemeter.      [Ches Issoi]     La prisent considerment of a standert & vie writeris called us services.      SPECIAL, INSTRUCTIONS / DES INSTRUCTIONS SPECIALES:		
An extra search							
An extra search	criteria nas bee	n entered					
Q Search	Ear Functions -	🖉 Clear		Combined Images		~	
							*
Batch Search Grid							
🖉 Close 🗸 Final	ize Search 🔽 Hori	izontal 📃 Vertical 📜	Finalize	W/ Totals 💿 Finalize			
LOAD#	ORDER:	#	PRO#		DOC TYPE INDEX 8 Counts		
			82138		1		
			82149		2		
			021/1	.30	1		
					This is an example of Horizontal search using the Finalize W/Totals & View	butt	ton.

### Vertical Search:

Include an index record if:

- Any indexes from Column 1 match
   AND
- Any indexes from Column 2 match
   AND
- Any Indexes from Column 3 match Continuing through ALL Grid Columns.

### Example: Vertical Search Using Finalize Search

1-IMPORTED MIQ DATA			_	IMPOR	TED MIQ DA	TA							0?¢
LOAD#       Index       Index <tr< th=""><th>Index Search</th><th>V Menu</th><th>•</th><th>4 4</th><th>Page 1</th><th>of 1 🕨 🕅</th><th>😂 Display</th><th>ying 1 - 4 of 4</th><th>🔄 Re</th><th>trieve Request</th><th>Display (</th><th>Checked 🔳 Dis</th><th>splay Options <del>-</del></th></tr<>	Index Search	V Menu	•	4 4	Page 1	of 1 🕨 🕅	😂 Display	ying 1 - 4 of 4	🔄 Re	trieve Request	Display (	Checked 🔳 Dis	splay Options <del>-</del>
LOAD#       Image: search	1-IMPORTED MIQ	DATA 🔲 Change System		E .	LOAD#	ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-D	PAGES
PRO#       B124910       BL       IMAGE       2015/04/22       001         DOC TYPE       B1       IMAGE       2015/04/22       001         INDEX 8       IMAGE       2015/04/22       001         INDEX 9       IMAGE       2015/04/22       001         From Date       To Date       POP       Device Id:\$00125757       User Id: MCKENZY       © Real Vison Software. All Rights Reserved         Search       Search       Horizontal       Vertical       Finalize W/ Totals & View       Vertical       TiNDEX 9         Batch Search Grid       Image       OC TYPE       INDEX 10 MCKENZY       © Real Vison Software. All Rights Reserved         Ø       Gose       Finalize Search       Horizontal       Vertical       Finalize W/ Totals & View         LOAD#       ORDER*       PRO*       DOC TYPE       INDEX 8       INDEX 9         8213826       bl       Sa13826       bl       Sa13826       Ji         8214910       misc       Sa11910       misc       Sa11910	LOAD#			_ Fid		20 00000000					1.11.1.1.1.1		Destroyers in
PRO#       8217198       BL       IMAGE       2015/04/22       001         DOC TYPE       IMAGE       2015/04/22       001         INDEX 8       IMAGE       2015/04/22       001         INDEX 9       Image       Image       2015/04/22       001         From Date       Image       Image       2015/04/22       001         Search criteria has been entered       Image       Image       Image       Image         Search Grid       Image       Image       Image       Image       Image         Image       Image       Image       Image       Image       Image       Image         Image <td< td=""><td>ORDER#</td><td></td><td></td><td></td><td></td><td></td><td>8213826</td><td>BL</td><td></td><td></td><td>IMAGE</td><td>2015/04/22</td><td>001</td></td<>	ORDER#						8213826	BL			IMAGE	2015/04/22	001
DOC TYPE IMAGE 2015/04/22 0.1   INDEX 8 INDEX 9 From Date To Date  From Date To Date PDF Device Id:\$00125757 User Id: MCKENZY © Real Vison Software. All Rights Reserved    Batch Search Grid Close Finalize W/ Totals Finalize W/ Totals View LOAD# ORDER# PRO# DOC TYPE INDEX 8 INDEX 8 INDEX 9 S213826 bl 8214910 misc	PRO#												
INDEX 8       Index 2013/04/22       001         INDEX 9       Index 2013/04/22       001         From Date       To Date       Index 2013/04/22       001         An extra search criteria has been entered       Index 2013/04/22       001         Search       Index 100 Date       Index 2013/04/22       001         Batch Search Grid       Index 2013/04/22       Index 2013/04/22       001         O Cose       Finalize W/ Totals & View       Index 2013/04/22       001         LOAD#       ORDER#       PRO#       DOC TYPE       INDEX 8       INDEX 9         8213826       bl       8213826       bl       8213826       bl         8214910       misc       Index 3       Index 9       Index 9	DOC TYPE												
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8213826 bl 8214910 misc		Eg Functions • Q Ces	r (P	PDF)		Device	Id:\$00125757	User Id: MCKE	ENZY		© Real Viso	in Software. All Ri	ights Reserved.
8214910 misc	Batch Search Grid	e Search 📃 Horizontal 🖉 Vertical 🚦		e W/ Tol			View				© Real Viso		ights Reserved.
	Batch Search Grid	e Search 📃 Horizontal 🖉 Vertical 🚦		e W/ Toi	10#		View DOC TYPE			IEX 8	© Real Viso		ights Reserved.
021/170 AI	Batch Search Grid	e Search 📃 Horizontal 🖉 Vertical 🚦		e W/ Tol PF 82	RO# 213826		View DOC TYPE bl			DEX 8	© Real Viso		ights Reserved.
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	Batch Search Grid	e Search 📃 Horizontal 🖉 Vertical 🚦		e W/ Toi PF 82 82	20# 213826 214910		View DOC TYPE bl misc			EX 8	© Real Viso		ights Reserved.
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	Batch Search Grid	e Search 📃 Horizontal 🖉 Vertical 🚦		e W/ Toi PF 82 82	20# 213826 214910		View DOC TYPE bl misc			EX 8	© Real Viso		ights Reserved.
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### WildCard Search Example:

1. Beginning Value: Searching for all case numbers that begin with 201.

Image Inquiry (Host Connec	cted) 《	Z-(	OURT D	OCUMENTS A	ND EXHIBITS					0 ? ¢
Index Search	V Menu -		4 4 F	age 1 o	f1 🕨 🕅 🥲 (	Displaying 1 - 5 of 5	🖾 Retrie	eve Request 🔀 I	Display Checked	Display Options -
Z-COURT DOCUMENTS AND	EXHIBITS 🔲 Change Syst		El	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
CASE #			Flags							
FILE DATE				201701	08/17/2017	M LEWIS	M SMITH	с	JONES	EVIDENCE
PLANTIFF			S L	201702	08/16/2017	M JOE	J LOU	с	DOUGLOUS	PETITION
				201702	08/31/2017	M MARY	J MARY	A	DIVISION A	PIC
DEFENDANT		• 🖻	NSL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
CASE TYPE			NL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
COURT/JUDGE										
DOCUMENT TO DE			/							
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	To Date									
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From Date	as been entered									
From Date	as been entered	(PI	DF)			5757 User Id: MCk	KENZY	©F	Real Vison Software. /	All Rights Reserved.
From Date	as been entered	(P	DF)		Device Id:\$0012	15757 User Id: MCH	KENZY	© I	Real Vison Software. /	All Rights Reserved.
From Date	as been entered	(P	DF)			5757 User Id: MCP	KENZY	©I	Real Vison Software, z	All Rights Reserved.
From Date  An extra search criteria ha C Search Search Grid	ctions • @ Clear			s 👁 Finalize	•	5757 User Id: MCK	KENZY	©I	Real Vison Software. /	All Rights Reserved.
From Date An extra search criteria ha C Search Batch Search Grid Close Finefize Search	ctions • @ Clear		W/ Total	s 👁 Finalize	•	5757 User Id: MCK CASE TYI		© F		All Rights Reserved.

### 2. Ending Value: Search for all case numbers that end with 801.

Image Inquiry (Host Connected)	*	z-c	OURT D	OCUMENTS AN	D EXHIBITS					\$ ? \$
Index Search	🚩 Menu 🕶			Page 1 of	1 🕨 🕅 🧶 🕻	Displaying 1 - 2 of 2	💽 Retri	eve Request 🛛 🛛	Display Checked	Display Options -
Z-COURT DOCUMENTS AND EXHIB	ITS 📕 Change Syst			CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
CASE #			Flags							
FILE DATE			NSL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
PLANTIFF			NL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
DEFENDANT										
CASE TYPE			/							
COURT/JUDGE		/								
DOCUMENT TYPE										
From Date 🖸 To Date										
An extra search criteria has beer	n entered									
🔍 Search 🛛 🖓 Functions -	🖉 Clear	(PC	DF)		Device Id:\$0012	5757 User Id: MC	KENZY	© F	Real Vison Software.	All Rights Reserved.
		1			•					
Batch Search Grid										
🖉 Close 🗸 Finalize Search 📝 Hori:	zontal 📃 Vertical 📜	Finalize	W/ Total	ls 💿 Finalize V	V/ Totals & View					
CASE # FILE DA	TE	PLANT	TIFF		DEFENDANT	CASE TY	PE	COURT/JUDG	E DO	DCUMENT TYPE
*801										

3. Bookend Value: Search for all case numbers that begin with 2 and end with 01.

Image Inquiry (Host Conne	ected)	~	z-co	DURT DO	OCUMENTS AN	D EXHIBITS					0?\$
Index Search	4 🔻	Menu 🔻	14	4 P	age 1 of 1		isplaying 1 - 3 of 3	🔄 Retrie	eve Request 🔀 D	isplay Checked	Display Options -
Z-COURT DOCUMENTS AN	D EXHIBITS 📕 Char	nge Syst		<b>F</b> 1	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
CASE #				Flags							
FILE DATE					201701	08/17/2017	M LEWIS	M SMITH	с	JONES	EVIDENCE
PLANTIFF				NSL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
DEFENDANT				NL	201801	01/18/2018	D DRAKE	S DRAKE	E	M DOWNS	PETITION
CASE TYPE		1		/							1
			1	/							
COURT/JUDGE			/								
DOCUMENT TYPE											
From Date	To Date										
An extra search criteria	has been entered										
🔍 Search 🛛 🖓 Fu	nctions 🖉 🖉	Clear	(PD	F)		Device Id:\$0012	5757 User Id: MCK	ENZY	© R	eal Vison Software.	All Rights Reserved.
	/	1									
Batch Search Grid											
	🗸 Horizontal 📃 Verti	ind in Fig	alize 1	W/ Totals	Cinalize W	// Totals & View					
/		-					C1 C2 T2	-	COURT/JUDG		
CASE #	FILE DATE	P	LANT	IFF		DEFENDANT	CASE TYP	°2	COURT/JUDGE	D	OCUMENT TYPE
2"01											

#### 4. Contained Value: Search for all case numbers that contain 017.

Image Inquiry (Host Connected) «	Z-C	OURT D	OCUMENTS A	ND EXHIBITS					0?\$
Index Search 💙 Menu 🗸			Page 1 o	f1 🕨 🕅 🥲 1	Displaying 1 - 4 of 4	🔄 Retrie	eve Request 🔀 I	Display Checked	Display Options 🗸
Z-COURT DOCUMENTS AND EXHIBITS 🔲 Change Syst			CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
CASE #		Flags							
FILE DATE		N	102017	10/19/2017	M LEWIS	M FONTENOT	I	AUTUMN G	
PLANTIFF			201701	08/17/2017	M LEWIS	M SMITH	с	JONES	EVIDENCE
		SL	201702	08/16/2017	M JOE	J LOU	с	DOUGLOUS	PETITION
DEFENDANT	• 🗖		201702	08/31/2017	M MARY	J MARY	A	DIVISION A	PIC
CASE TYPE		/							
COURT/JUDGE		/							
DOCUMENT TYPE									
From Date 🖪 To Date									
An extra search criteria has been entered									
🔾 Search 🛛 🔄 Functions 🗸 🖉 Clear	(PD	F)		Device Id:\$0012	25757 User Id: MC	KENZY	© F	Real Vison Software.	All Rights Reserved.
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Batch Search Grid									
🖉 Close 🗸 Fipalize Search 🕼 Horizontal 🥅 Vertical 🗮 F	inalize	W/ Tota	ls 💿 Finalize	W/ Totals & View					
CASE # FILE DATE	PLANT	IFF		DEFENDANT	CASE TY	PE	COURT/JUDG	E DO	CUMENT TYPE
*017*									

To clear the Batch Search area, you must either press the *Clear* or *Change System* buttons in the Image Inquiry Index Search window. This will also eliminate the red indicator warning message 'An extra search criteria has been entered.'

Z-COURT DOCUMENTS AND EXHIBITS   CASE #   FILE DATE   PLANTIFF   DEFENDANT   CASE TYPE   COURT/JUDGE   DOCUMENT TYPE   From Date   I To Date   An extra search criteria has been entered	Index Search		🔻 Menu 👻
FILE DATE         PLANTIFF         DEFENDANT         CASE TYPE         COURT/JUDGE         DOCUMENT TYPE	Z-COURT DOCUMENTS AND EXHI	BITS 🔲 Cha	ange System
PLANTIFF DEFENDANT CASE TYPE COURT/JUDGE DOCUMENT TYPE From Date To Date	CASE #		
DEFENDANT CASE TYPE COURT/JUDGE DOCUMENT TYPE From Date To Date	FILE DATE		
CASE TYPE COURT/JUDGE DOCUMENT TYPE From Date	PLANTIFF		
COURT/JUDGE DOCUMENT TYPE From Date To Date	DEFENDANT		
DOCUMENT TYPE From Date To Date	CASE TYPE		
From Date To Date	COURT/JUDGE		
	DOCUMENT TYPE		
An extra search criteria has been entered	From Date	o Date	•
	An extra search criteria has be	en entered	

## 8.6. Drag Drop/Import

To watch a video on this topic CLICK HERE

- 1. Open the RVI PC viewer (<u>RVI.EXE</u>).
- 2. Drag and drop a file onto the RVI PC viewer window.
- 3. Verify the



button in the bottom left hand corner of the RVI PC viewer is active.

- 4. Select an index method:
  - a. Drag Drop (PC Viewer Indexes)
  - b. Drag Drop (Indexes Above)

One Look requires the **<u>RVI PC Viewer</u>** for drag drop.

# 8.6.1. Drag Drop (Indexes Above)

- 1. Open the RVI PC viewer.
- 2. Drag drop a file onto the RVI PC viewer.
- 3. Navigate to One Look.
- 4. Enter the index values.
- 5. Select Functions, Drag Drop/Import Functions, Drag Drop (Indexes Above).

mage Inquiry		« z	COURT D	OCUMENTS AN	D EXHIBITS					<b>@</b> ?
Index Search	V Menu	-	14 4   F	Page 0 of	0 🕨 🕅 🥏 N	data to display		D) (	isplay Checked	Display Options -
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	🕚 Batch Indexing	C D	rag Drop (P	C Viewer Indexe	s)					
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		1								
		(	PDF)		Device Id:\$001053	44 User Id: MC	KENZY	©R	eal Vison Software. A	All Rights Reserved

## 8.6.2. Drag Drop (PC Viewer Indexes)

- 1. Open the RVI PC viewer.
- 2. Drag drop a file onto the RVI PC viewer.
- 3. Click the BC/OCR button to index the file.
- 4. Click the CLOSE button when indexing is finished.

RVI Image System 8		– 🗆 X
Image View Scan Print Page Host		
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	In the District Court Of Georg	etown, Texas
-	Joe Joe and City State Mutual Automobi	ile Insurance Company
	123m Judicial Distr	ict
CODE Z · COURT DOCUMENTS AND EXHIBITS	Defendant's Original A	nswer
CASE #	City State Mutual Automobile Insurance Co above-styled and numbered cause, files its Orig	
170008	Amended Petition, and would show unto the C	ourt the following:
FILE DATE 08/16/2017	I. Defendant denies each and all, singular and pl contained in Plaintiffs' First Amended Petitio	
PLANTIFF	thereof. Defendant moves and prays the Court that u	
J JOE	recover nothing and that Defendant go hence	
DEFENDANT	further relief as it may show itself e	entitled to receive.
CITY STATE MUTUAL		
CASE TYPE		
C		
COURT/JUDGE		
MONROE		
DOCUMENT TYPE		
DEFENDENT ORIGINAL ANSWER		
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Cl <u>o</u> se <u>U</u> pload		
C Bar Code/OCR Indexes       Import Files	8.50 x 11.00 in <	>
C Full Text OCR Results C Word Extract Results	CourtExample.pdf (Document 1	Page 1 of 1)
BC/OCR Ready Document 1 of 1	C:\RVI\IMP\90AB21.pdf	Connected: A D Socket

- 5. Navigate to One Look.
- 6. Select Functions, Drag Drop/Import Functions, Drag Drop (PC Viewer Indexes).

mage Inquiry		~	Z-0	OURT D	OCUMENTS	AND	EXHIBITS					8 ? \$
Index Search	V Menu	•	14	4 P	age 0	of 0	▶ ►	data to display		D	isplay Checked 📃	Display Options -
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			(PD	IF)			Device Id:\$0010534	4 User Id: MC	KENZY	©R	eal Vison Software. A	I Rights Reserved.

## 8.6.3. Browse Import (Indexes Above)

To watch a video on this topic CLICK HERE

From Image Inquiry:

- 1. Enter the indexes values to be associated with the imported file.
- 2. Select Functions, Drag Drop/Import Functions, Browse Import (Indexes Above).

Index Search	V Men	-	k	F	age 0 of (	0   > >   2 No	data to display		D 🖸	isplay Checked 📃	Display Options -
Z-COURT DOCUME	NTS AND EXHIBITS 🧾 Change Syste	m		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
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PLANTIFF											
DEFENDANT											
CASE TYPE											
COURT/JUDGE											
DOCUMENT TYPE			1								
From Date	To Date	•									
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	Scan Functions	F									
	Drag Drop/Import Functions	C	Dra	g Drop (I	ndexes Above)						
	Batch Indexing	C	Dra	g Drop (P	C Viewer Indexe	s)					
	OCR Word Search	63	Bro	wse Impo	rt (Indexes Abov	ve)					
	Additional Index Filter										
			(1)	DF)		Device Id:\$0010534	Uses Id. MC	/EN7V		eal Vison Software. A	II Diabta Dasanuad

### 3. Click the Browse button

4. Navigate to the file(s) to be imported.

mage Inquiry «	Z-0	OURT D	OCUMENTS AND	EXHIBITS					0 ? Ø
Index Search Venu -	14	4   F	Page 0 of 0	▶ N @ N	data to display		Dis	play Checked 📃	Display Options 🕶
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JUDGEMENT									
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Choose file: Browse									
🕆 Upload 🖉 Cancel									
	(PD	-1		Device Id:\$001053				l Vison Software. A	

5. Click the **Upload** button to transmit the file(s) to the server. (One record per file will be generated at upload time.)

## 8.7. Document Packages

**Document Packages:** Provides the ability to display documents that have been packaged together. Document packaging occurs during the routing process based on document package rules. (*Document Packaging is setup by your system administrator.*)

In the WorkBasket tab, if a package exists, is will appear under the Flags column. If a package exists, but documents are missing will appear under the Flags column. View package documents by double-clicking the record. In the subfile list, missing items will be labeled (MISSING)

For further details on Packages and the setup requirements, refer to Chapter 7 (Maintain Document Packages) in the <u>RVI 90 IBMi User Manual</u>.

### 8.8. Document Tabbing

**Document Tabbing:** A feature that is used for additional database security and filtering. It offers the ability to group similar documents for viewing. (*Document Tabbing is setup by your system administrator.*)

Refer to Chapter 7 (Real Vision Document Tab Menu Functions) in the <u>RVI 90 IBMi User Manual</u> for details on Document Tabs.

## 8.9. Email

1. Double click a record to view the image.

When <u>session settings</u> are set to **RVI to Viewer**, forcing the display of images inside the RVI pc viewer, the One Look email button will not be active. The user must utilize the email option with in the RVI pc viewer.



3. Fill in the fields under Options Processing, Email Image

Options Processing	>>
Email Image	
MDOUG@LAW.COM	
M DOUGLAS	
CC:(EMAIL ADDRESS)	
COURT DOCUMENT	
UPDATED COURT DOCUMENT FOR CASE XYZ,234	
SUPPORT@REALVISIONSOFTWARE.COM	
ा Send Email 🛛 🖉 Cance	el



CK

-⊡ Send Email

Email contacts are setup and maintained through the email address book in the One Look <u>maintenance menu</u>.

## **Optional Default Return Email Address Setup:** (Used when an <u>originator email address</u> is not found on the IBMi.)

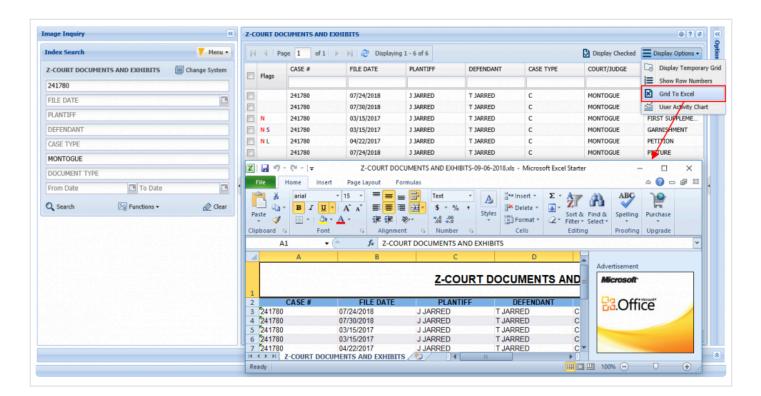
From a command line on the IBMi server, type GO IMAGE (RVILIB must be in your library list).

- Option 8 Maintenance Menu
- Option 6 Maintain System Control File Parameters
- **F5** = Setup By Function
- Select 'Email'
- For Return Address: set value to return email address to be used as the default in One Look.

Email Setup Screen (c	)Copyright RVI 1992, 1999
	rvsf00fm/format8
	Control File
	Record
From Company Name : REAL VISION SOFTWARE INC.	ECOMPANY
Default Address To Use	EMAILADD
For Return Address : RVOFFICE@REALVISIONSOFTWAR	E.COM

# 8.10. Export To Excel

**Grid to Excel:** Display a list of the One Look sub file records in Excel. Also, used in <u>spool file search</u> to display spool file reports in Excel.



## 8.11. Fax

Fax the document being viewed.

Contact <u>Real Vision Software</u> support for details on Faxing when using One Look.

# 8.12. File Import

For details on file import, reference **Browse Import** under the Drag Drop/Import section.

## 8.13. Image Markup

To watch a video on this topic CLICK HERE

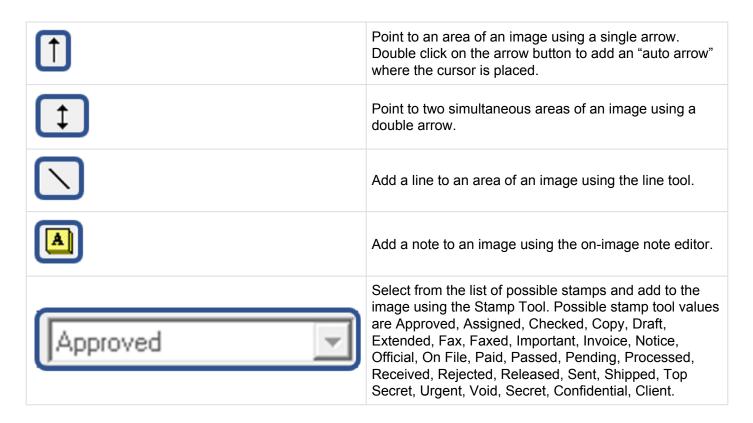
Image Markup is a feature that allows for the annotation of specific areas of an image. Image Markup is only available using the RVI PC Viewer while displaying a scanned black and white image.



Access to Markup and Redaction options are controlled through the <u>Security/Internet Menu</u> on the IBM i. Image Markup preferences are set inside the RVI PC Viewer <u>Display Properties</u>.



	Allows the user to select an annotation object to move, resize, or delete.
	Draw a rectangle around an area of an image.
	Draw a stamp value on an area of an image. The values available are listed in the Stamp Values drop down list.
$\bigcirc$	Draw a circle around an area of an image.
	Highlight an area of an image using a transparent highlighter.
	Redact an area of an image using an opaque highlighter. Redaction requires a special security setup.



To add a markup: Click the desired markup button.

Draw a rectangle around the desired area.

To modify markups:



then click on the existing markup and make any needed

Click the Select Cursor Tool modifications and deletions.

To save markups:

Click Image, Close in the top left hand corner of the RVI PC Viewer.

Any user can add/modify markups unless restricted by <u>securing option code 2</u> (Highlighting) on the IBM i.

## 8.14. Index Maintenance

Maintenance: Allows for the updating of indexes, duplication of the record, and deletion of the record.

- If **Duplicate** is selected, RVI will create a new record with a new transaction number. The new record will point to the same image system and indexes as the original record. This allows users to be able to update sensitive index information without stepping on the original record.
- If Delete Record is checked, the item will be removed from image inquiry.

Index Search Menu -	Image Inquiry 🔍	Back		^	Options Processing	33
Z-COURT DOCUMENTS AND EXHIBITS Chart       Chart         Z41780       Image: Chart         File DATE       Image: Chart         PLANTIFF       Image: Chart         COURT /JUDGE       Audit Information         COURT /JUDGE       Audit Information         COURT /JUDGE       To Date         Image: Court       Display: Temp: Gid         Search       Princtions -         Image: Court       Display: Temp: Gid         Image: Court /JUDGE       Add to Temp: ray:         Image: Court /JUDGE       Display: Temp: Gid         Image: Court /JUDGE       Add to Temp: ray:         Image: Court /JUDGE       Add to Temp: ray:         Image: Court /JUDGE       Add to Temp: ray:         Image: Court /JUDGE       Display: Temp: Gid         Image: Court /JUDGE </th <th>Index Search V Menu -</th> <th></th> <th></th> <th></th> <th>Index Maintenance</th> <th></th>	Index Search V Menu -				Index Maintenance	
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			NAME RODECT HOUL			
		Image ID:ZAAAADKR		~		
						*

## 8.15. Linking

**Linking:** Provides the ability to establish a primary document with a link to the other documents in different RVI imaging systems. For example, the primary document in HR could have a link to a document in the employee payroll system.

RVI security applies. This option assumes that if the user has security to the system associated with the primary document, they also have security to the system(s) associated with the linked document(s). (*The linking profile is setup by your system administrator*.)

### If the document's indexes satisfy a linking rule that is setup for this image system:

• The system will display L next to the record.

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14	4 Page	1 of 1   >	M 2	Displaying 1	- 1 of 1		🔄 Retrieve R	equest 🔀 Disp	lay Checked 🗧 D	isplay Options •
	Flags	LOAD#	ORDE	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES
	NRL	FREDDS01XX		0000001	D0C3			IMAGE	2018/08/28	006

### Two options to access Linking:

### Option 1:

• When you view the document, click Linking to see the list of systems with documents linked to the current image. Select a system code from the list. The Link Information grid will open at the bottom of the screen with a listing of linked documents for that system.

*Example:* System C was selected so the Link Information at the bottom of the screen shows System C documents linked to the primary document in the display window.

Image Inquiry «	Back	<b>5</b> 1 ↔	🕫 🕶 📰 🔊 🕫	H + + H	• # 🐼	~
Index Search 🗸 Menu 🗸	Notes	•		-		^
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From Date 🖪 To Date	D-AP SYSTEM	1	1			
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	Image ID:1AAAP(	IC Ready		1AAAPCIC.001 RE	AL VISION SOFTWARE, INC	
Link Information	Image ID: 1AAAPC	IC (RV) Ready		1AAAPCIC.001 RE	AL VISION SOFTWARE, INC	š,
Court system Cour	Image ID: 1AAAPC (CASE #)	IC RY Ready		1AAAPCIC.001 RE	(CASE TYPE)	(COURT/JUDGE)

· Double-click any item in the list to view the document.

e

Linking

•

### Option 2:

• Right-mouse click the record, select

to view the list of systems with linked

documents. Select a system in the list to leave this system and connect to the linked system. All images for the selected system linked to the primary image will be listed at the bottom of the screen.

*Example:* System D was selected so the Link Information at the bottom of the screen shows System D documents linked to the primary document in the display window.

Image Inquiry	, C	1-IMPORTED	MIQ DATA								0?\$	~
Index Search	V Menu -	Id d Pag	ge 1 of 1	N 2	Displaying 1 - 1	of 1		🛐 Retrieve R	equest 🖸 Dis	play Checked 📃 🛙	Visplay Options 🕶	Options
1-IMPORTED	MIQ DATA 📃 Change System		LOAD#	ORDE	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES	
fredds01xx		Flags										Processing
ORDER#		NRL_	FREDDS01XX		0000001	D0C3			IMAGE	2018/08/28	006	ing
PRO#			Show Notes									
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From Date	To Date		Show Routing									
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		(PDF)	C Load Indexes	_	P SYSTEM	User Id: MC	KENZY		© Rea	l Vison Software. All	Rights Reserved.	
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D	INVOICE	GENESIS	ASSOC	FED PILOTS								~

• Double-click any item in the list to view the document.

For further details on Linking and the setup requirements, refer to Chapter 18 (Image System Links section) in the <u>RVI 90 IBMi User Manual</u>.

## 8.16. Notes

**Notes:** Adds notes to the image being displayed.

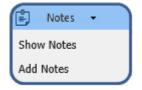
mage Inquiry «	Back II.      Back      That your perificance desires to amend his Petition for Divorce and Other Relief by	^
Index Search   Index Search   Z-COURT DOCUMENTS AND EXHIBITS   241780   241780   FILE DATE   PLANTIFF   DEFENDANT   CASE TYPE   COURT/JUDGE   DOCUMENT TYPE   From Date   You Search   You Search	IL That your petitioner desires to amend his Petition for Divorce and Other Relief by adding paragraph 19 to read as follows: Show Notes Add Notes Email Routing Append Scan Add to Temporary	
	Image ID:ZAAAADKS By his attorney,	

The record can be 'checked out' during the addition of notes to ensure that there are no conflicts between one or more users attempting to add notes to the same document.



### Once a Note is Added:

• The option to Show Notes will be available.



When displaying notes, the user can right click a line item to delete or close the note.

lotes L	isting			
🗲 Bac	:k 🕂 Add Note Rig	ht click item for more options.		
Flags	User	Note	Entry Date	Close Date
0	MCKENZY	Close Note	071818	000000

If the user chooses to close the note, under the Flags column, the O will change to C and the current date will be applied to the Closed Date field.

Notes Lis	sting			
🔦 Back	🕂 Add Note Right c	ick item for more options.		
Flags	User	Note	Entry Date	Close Date
С	MCKENZY	TEST NOTE	071818	072518

If the user chooses to delete the note, it will be permanently removed from the file.

• The system will display 'N' next to the record.

mage Inquiry «	2-COURT DOCUMENTS AND EXHIBITS									
Index Search Venu •	🔢 🕴 Page 1 of 1 🗇 🕅 🐉 Displaying 1 - 10 of 10									
Z-COURT DOCUMENTS AND EXHIBITS 🔲 Change Sys	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE		
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DEFENDANT	NL.	241780	04/22/2017	J JARRED	T JARRED	c	MONTOGUE	PETITION		
CASE TYPE		241780	07/24/2018	J JARRED	T JARRED	с	BEAR	PICTURE		
		241780	07/24/2018	J JARRED	T JARRED	с	BIRD	PICTURE		
COURT/JUDGE		241780	07/24/2018	J JARRED	T JARRED	c	MONTOGUE	PICTURE		
DOCUMENT TYPE		241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE		
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		241780	01/18/2018	J JARRED	T JARRED	с	J DOWNS	WORD		

## 8.17. OCR

OCR requires a separate OCR license per pc. Contact <u>Real Vision Software</u> support for details.

# 8.17.1. OCR Word Search

This function is used in conjunction with OCR scanning. It allows users to search all documents in a particular system id code for words that have been OCR'd at scan time. The OCR Word Search option will only be available for those system id codes that have existing full text OCR in place.

1. Select the	Functions - button.	
2. Select the	OCR Word Search	button.

Index Sea	uiry rch		Menu 🗸
	DOCUMENTS AND EXI	HIBITS	Change System
CASE #			
FILE DAT	E		
PLANTIF	:		
DEFENDA	NT		
CASE TY	Έ		
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	Search Word 1		
	Search Word 2		
	Search Word 3		
	Search Word 4		
	Search Word 5		

3. Enter the word(s) that you want to search for within the OCR documents in the selected system id code.

Solution of the second second

# 8.18. PC Screen Scrape

## Screen Scrape works with Internet Explorer only.

PC Screen Scrape reads data on *most* personal computer (PC) Windows-based application screens. It also operates in conjunction with the RVI One Look Viewer using a pc screen scrape profile setup on the IBM i.

## PC Screen Scrape Requirements:

- Host system HTTP server must be configured and active
- Users QTMHHTTP and QTMHHTP1 must be enrolled in the System Distribution Directory

## PC Screen Scrape Setup:

- 1. Open One Look in Internet Explorer
- Navigate to the desired screen to be scraped, select CTRL+SHIFT+F5 (One Look will display a message 'No Screen Scrape Profile found.')
- 3. Open an IBM i green screen session and navigate to an IBM i command line
- 4. Type **GO IMAGE** on the IBM i command line (*RVILIB must be in your library list*)
- 5. Option 12 Screen Scrape Menu

## REAL VISION IMAGE MENU Ver. 8.0

1. Image Inquiry.	6. Image Management Menu.	11. Security/Internet Menu.
2. Scanning Menu.	7. Optical Menu.	12. Screen Scrape Menu.
3. Spool File Menu.	8. Maintenance Menu.	13. Import External Documents.
4. Color Menu.	9. Document Tab Menu.	14. System Operator Menu.
5. Fax/E-Mail Menu.	10. OCR Menu.	15. Customer Specific Menu.

Selection or command	F3 =Exit	Help Available	90 =Signoff
> 12	Selection or command		
/ <u>12</u>	===> <u>12</u>		

F3=Exit F4=Prompt F9=Retrieve F12=Cancel F13=Information Assistant F16=System main menu

6. Option 1 Maintain Screen Scrape Profiles (Manual)

## REAL VISION SCREEN SCRAPE

1. Maintain Screen Scrape Profiles. (Manual)

- 2. Maintain Screen Scrape Profiles. (Point And Click)
- 3. Reset Attention Key For Image Inquiry.
- 4. Maintain Pop-Up Menu.
- 5. Screen Scrape Profile Report.
- 6. Workbasket Indexing Maintenance

F3 =Exit Help Available 90 =Signoff Selection or Command ===> <u>1\_\_\_\_\_\_</u>

F3=Exit F4=Prompt F9=Retrieve F12=Cancel F13=Information Assistant F16=System main menu

7. F6 = Add New PC Profile

osition To:		SCR004FM/FATLST(
P =PC Point &	Shoot Maintenance	
< =Select		
<pre>&lt; Profile</pre>	Image System	Unique Screen Identifier
COURT400	C-COURT SYSTEM	01 037 CIVIL SUIT INQUIRY
DEANTEST	1-IMPORTED MIQ DATA	01 001 Hopewell City
DYNAMICS	9-AP DYNAMICSAX	01 001 DYNAMICS
FRESCHEB	B-BANKING DDA SYSTEM	02 045 PT_WINV
HRWEB	U-HR WORKFLOW SYSTEM	04 017 Human Resources Applicationx
HR400	U-HR WORKFLOW SYSTEM	03 028 Employee Inquiry
INSURANCEN	I-INSURANCE SYSTEM	05 002 Demo Insurance
INSURWEB	I-INSURANCE SYSTEM	04 014 Insurance Application
INSUR400	I-INSURANCE SYSTEM	02 003 Demo Insurance
INSWEB	I-INSURANCE SYSTEM	09 006 Insurance Application
JDEMESS	7-DEMO SYSTEM FOR JDE	01 001 JDEMESS
	H-MEDICAL SYSTEM	04 014 Medical Application
MEDICAL400	H-MEDICAL SYSTEM	03 028 ENCOUNTER HISTORY
	ious Page	New Profile Page Down =Next Pag F8 =PC PreScrape Maint Enter =Continue

8. Specify a Screen Scrape Profile Name

#### Screen Scrape Profile Maintenance Screen

#### (c)Copyright RVI 1992, 1999 SCR005FM/FORMAT1

This Program Allows You To Enter And Update Screen Profiles

To View A List Of All Profiles Currently On File, Leave The Name Blank And Press Enter.

Screen Scrape Profile Name: ACC

F3 =Exit

Enter =Continue

9. Select an Image System Code

Image Syste	m Selection Screen	(c)Copyright RVI 1992, 1999
		SCR005FM/CATLSTSF
Select Image	System By Typing An X Next To The	e Appropriate System ID Code.
X System	Description	
_		
_ S	ACCUFUND PURCHASE ORDERS	
_ т	TRANSPORTATION SYSTEM	
_ U	HR WORKFLOW SYSTEM	
- v	NET DATA DEMO IMAGES	
W	DEMO WORK SYSTEM	
- x	FULL TEXT SEARCH DEMO	
– Y	FIDELITY BANK SAMPLE DATA	
<u>x</u> z	COURT DOCUMENTS AND EXHIBITS	
- 0	ACCUFUND CASH RECEIPT	
<b>-</b> 1	IMPORTED MIQ DATA	
2	ACCUF ACTIVITY/JOURNAL	
3	ADMISSION IMAGES	
_ ŭ	ACCUFUND GRANTS	+
- 4		
Page Down -N	ext Page	Page Up -Previous Page
-	-	
F3 =Exit	F12 =Cancel	Enter =Continue

10. F3 to exit the Screen Scrape Profile Maintenance Screen

Screen Scrape Layout/Maintenance Screen (c)Copyright RVI 1992, 1999 Image System Description SEGMX COURT DOCUMENTS AND EXHIBITS Screen Profile: ACC Z F1=STARTING POSITION Line 1...+...10....+...20....+...30....+...40....+...50....+...60....+. 000000001 Real Vision Software, 8.0 - Internet Explorer 000000002 <]-- var rvisb = "N"; function apfunct(na) { if (rvisb == "N") { d</pre> 000000003 000000004 000000005 000000006 000000007 000000008 Real Vision Imaging System Legal Application 000000009 000000010

Page Up/DownF1 =Beginning FieldF2 =End FieldF12 =CancelF3 =ExitF19 =Scroll LeftF20 =Scroll RightF21 =ProfileEnter =ContinueF8 =Move Window LocationF9 =Layout Aux. Fields

11. Put a P next to the profile name

X =Select

\_ ACCUFCR

\_ ACCUFUND

\_ AP SYSTEM

<u>P</u> ACC

\_

#### Screen Scrape Selection Screen (c)Copyright RVI 1992, 1999 SCR004FM/FATLSTCT Position To: P = PC Point & Shoot Maintenance X Profile Unique Screen Identifier Image System Z-COURT DOCUMENTS AND 11 001 Alexandria County Court ACCTPAYFT A-AP WORKFLOW SYSTEM 01 001 ACCTPAYFT 2-ACCUF ACTIVITY/JOURN 01 001 ACCUFAJE ACCUFAJE ACCUFAPINV O-ACCUFUND ACCOUNTS PA 01 001 ACCUFAPINV ACCUFARINV P-ACCUFUND A/R SYSTEM 01 001 ACCUFARINV

01 001 ACCUFGRANT

01 001 ACCUFUNDPC

03 024 Inquiry by Invoice Number

Page Up =Previous Page F10 =Add New Profile Page Down =Next Page F3 =Exit F6 =Add New PC Profile F8 =PC PreScrape Maint Enter =Continue

0-ACCUFUND CASH RECEIP 01 001 ACCUFCR

R-SIGNATURE DOCUMENT S 12 001 General F

\_ ACCUFGRITM 5-ACCUFUND GRANT ITEMS 01 001 ACCUFGRITM \_ ACCUFPOINV S-ACCUFUND PURCHASE OR 01 001 ACCUFPOINV \_ ACCUFRQINV Q-ACCUFUND REQUISITION 01 001 ACCUFRQINV

12. Select yourname.TXT file (this file is created in Step 1)

\_ ACCUFGRANT 4-ACCUFUND GRANTS

\_ ACCUFUNDPC I-INSURANCE SYSTEM

D-AP SYSTEM

PC-Se	crape Text Fil	e Selection		(c) Cop	yright 2008, RVI
Optic			ed From Most Recent	To Oldest	RVPSLSFM/SFLCTL
X = \$	Select F	3 or F12 To U	se PCS.TXT		
<u> 0pt</u>	<u>File Name</u>	<u>Date Created</u>	<u>First Line In File</u>		
_	P150750.TXT	2018/09/20			
_	P145740.TXT	2018/09/20			
_	P142849.TXT	2018/09/20			
_	P140704.TXT	2018/09/20			
_	P114325.TXT	2018/09/20			
_	P114119.TXT	2018/09/20			
_	P112141.TXT	2018/09/20			
_	P110700.TXT	2018/09/20			
_	P110245.TXT	2018/09/20			
_	P110113.TXT	2018/09/20			
_	P104931.TXT	2018/09/20			
_	MATTHEW.TXT	2018/09/20	091818_OneLook_IBMi	.Cloud_Fix	- Compatibilit
x	MONTY.TXT	2018/09/20	Real Vision Softwar	e, 8.0 - In	ternet Explorer
_	0106500.TXT	2018/09/13	30		
-	0106501.TXT	2018/09/13	ACCUFAPINV		
-					More
Page	Up/Down =More	Files	ENTER =Continue		F12 =Cancel

13. Type a Screen Scrape Profile Name or press Enter for a list of existing profiles

#### Screen Scrape Profile Maintenance Screen

(c)Copyright RVI 1992, 1999 SCR005FM/FORMAT1

This Program Allows You To Enter And Update Screen Profiles

To View A List Of All Profiles Currently On File, Leave The Name Blank And Press Enter.

Screen Scrape Profile Name: ACC

F3 =Exit

Enter =Continue

- 14. Put your cursor on the starting position of the Unique Screen Identifier then press F1
- 15. Put your cursor on the ending position of the Unique Screen Identifier then press F2

Screen Scra	pe Layout/Maintenance	Screen (c)Copyright RVI 1992, 1999
		Image System Description SEGMX
Screen Pro	file: ACC Z	COURT DOCUMENTS AND EXHIBITS
	F1=STARTING POSITION	
Line	1+10+20	+
000000001	Real Vision Software	, 8.0 - Internet Explorer
000000002		
000000003	<] var rvisb = "N"	<pre>; function apfunct(na) { if (rvisb == "N") { d</pre>
000000004		
000000005		
000000006		
000000007		
000000008	Real Vision Imagin	ng System
000000009	Legal Applicati	on
000000010	<b>—</b> — • •	

Page Up∕Down	F1 =Beginning Field F2 =End Field F12 =Cancel
F3 =Exit F19 =Scroll Left	F20 =Scroll Right F21 =Profile Enter =Continue
F8 =Move Window Location	F9 =Layout Aux. Fields

16. Set Index 00 to designate the previously selected value as your Unique Screen Identifier (*Subsequent Index designations should correspond to the index being defined.*)

Screen Scrape Profile Maintenance Screen	<u>(c)Copyright</u>	RVI 199	<u>92, 1999</u>
		SCR005F	-M/START
Please Enter The Corresponding Indexing Number. (1	-8)		
Indexes Are Shown Here For The Image System Select	ed. Please S	elect Ar	1 Index
From 1-7 Or Use 8 To Select The Unique screen iden	tifier.		
Image System - Z COURT DOCUMENTS AND EXHIBI	TS		
1. CASE #			
2. FILE DATE			
3. PLANTIFF			
4. DEFENDANT			
5. CASE TYPE			
6. COURT/JUDGE			
7. DOCUMENT TYPE			
Index Number 1-99: <u>0</u> 0 = Screen Unique	Identifier		
Starting Position: 6			
Ending Position: 22			
Length: 17			
Line: 9			

Enter =Continue

17. Repeat Steps 14 – 16 for each index value to be defined

\_

#### PC Screen Scrape Test:

- Open One Look in Internet Explorer
- · Navigate to the desired pc screen to be captured
- Press CTRL+SHIFT+F5 to capture the screen

If the screen scrape profile was successfully setup, One Look will display a subfile list of your results.

#### PC Screen Scrape Example:

For the purpose of our example, assume that we set up the pc screen scrape profile to search for the value occurring after "Vendor Number:".

First make the PC application window the active window and press the hot-key (ctrl-shift-F5).

	nts Payable App			
	Inquiry B	y Invoice Number		
Vendor Number: 121	In the second	Charle Date	Description	
Sayes Office Supply	23456	O2/03/11	Description Toner Cart.	Amount 655.17
1405 McArthur Dr.	Invoice Date	Due Date	Check Number	055.17
Alexandria, LA. 71315	01/31/11	02/03/11	10795	
	P.O. Number	04/03/11	10755	
	168			
	Vendor In	formation On File		
Balances		Codes		
Current Balance:	.00	Order Designation:	Phone	
Credit Amount Avail	: 999.00	P.O. Required:	Yes	
Description:	Office Supply	Date of Last Order:	12/10/10	
Check Type:	General Form	Amount of Last Invoice:	655.17	
Company Code:	10	Date of Last Shipment:	12/22/10	
Net Due Days:	10			
	Su	bmit Home		
		Deliver As PDF		
		Post To SB System		
		Post To 58 System		

Based on the vendor number 121, these results are displayed in the frames-based listing in One Look.

age Inquiry		*	Awa	aiting System Se	ection					0 7 0
dex Search		Venu •	14	4 Page 1	of 1 🕨 🕅	Displaying 1 - 3 of 3		6	Display Checked 🛛 🗮 Show Row Nu	umbers 🔀 Grid to Excel
		E Change System		Flags	VENDOR	*	DATE		DOCUMENT TYPE	
ENDOR #:	121					×		×		×
ATE		3			121		01/25/2011		PURCHASE ORDER	
OCUMENT TYP	r				121		01/31/2011		INVOICE	
					121		02/03/2011		CHECK	
rom Date	To Date									
Search	E Functions •	🖉 Clear								
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			(PC	2F)		Device Id:500	199461 User Id: MONTY		() Real Vison Soft	tware. All Rights Reserved.

For further details on the IBMi Screen Scrape menus and the use of a Pre-Scrape Profile when the data on the interface screen is not static, refer to Chapter 14 (Screen Scrape Menu Functions) in the <u>RVI 90 IBMi User Manual</u>.

# 8.19. Print

When viewing in One Look, documents can be printed directly from the PDF frame.

mage Inquiry	~	Sack	н.
Index Search	🔻 Menu 🕶	Notes -	That your petition 🗈 🖶 🛛 🔿 🕁 🗼 e and Other Relief by adding paragraph 19 to
Z-COURT DOCUMENTS AND EXHIBITS	Change System	(j) Details	
241780		Maintenance	Print file (Ctrl+P) The defendant has recently exminited volatile and erratic
FILE DATE		Email	behavior and mood swings and your petitioner shows that it would be in the best interest of the children for the Court to
PLANTIFF		Routing -	order a psychological evaluation of both parties by a mental
DEFENDANT		Audit Information	health professional selected by the Court, and that this would
CASE TYPE		+ Append Scan	be in the best interest of the children."
COURT/JUDGE		+ Add to Temporary	
DOCUMENT TYPE			
From Date 🖸 To Date	•		WHEREFORE, YOUR PETITIONER PRAYS:
Q Search 🛛 🖓 Functions 🗸	🖉 Clear		<ol> <li>That this amended pleading be deemed good and sufficient and be ordered filed;</li> </ol>
			<ol><li>That the prayer of the petitioner's original Petition for Divorce and Other Relief is reiterated and reaffirmed, save and except as may be inconsistent herewith;</li></ol>
			<ol><li>That all allegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and</li></ol>
			<ol> <li>For all necessary orders and decrees.</li> </ol>
		Image ID:ZAAAADKS	

When viewing in RVI.EXE, documents can be printed using the Print menu.

🞯 RVI Image System 8			_	
Image View Scan Print Page	Host			
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1 = 🗢 O 🗷 O 🖌	1 🔪 🔺 🛛 🗛	oved 💌		
	1			
STATE OF LOUISMAA Ruiteh of Ruiters				
AFFIDAVIT				
BEFORE ME, the undersigned authority-URNATHAIC CHARTE AMPRED, personally come and appeared , who after being first July anome, did depose and app That if the the performer in the above reprinted matter and that all adapted at that are the adapted on the first of the transmission.	r			
internation and bold. abjectives Cartely abject				
SHOWN TO AND SUBSCTIDED before me. Noticy Public, on this the $\underline{\beta}$ / $\underline{k}$ days of May, 2011, in Alexandria, Louisiana.				
CELECCO HOURS () MARE RECORD () MARE				
241780	03/15/2017 GARNISHMEN	IT (Document 1 Page 1	of 2)	
BC/OCR Ready	Document 1 of 2	C:\RVI\CACHE\1AA	AL3JT.001 Not	Connected

# 8.20. Polling

Polling is only available for IBM i customers (not Cloud customers).

To watch a video on this topic CLICK HERE

## **IBM i Configuration:**

- 1. From an IBM i command line, with RVILIB in your library list, type GO IMAGE
- 2. Select Option 8 Maintenance Menu

- 3. Select Option 7 Maintain PC Workstation Configuration
- Select a existing user by placing an X next to the record <u>OR</u> create a new record using F10 = Add A Record
- 5. From the Maintain PC Workstation Configuration Screen, set Image Viewer to O or P

Maintain PC Workstation Configuration Screen (c)Copyrigh	t RVI 1992, 1999
	RTRVIFM/CNT100D5
_ D,Y=Data Queue _ S,N=Folders _ 1=FTP-TCPADDX Value F=FTP U=UNC _ 2=UNC-SYSTEMX Value	
H=HTTPT=TCP-UNC3=HTTP-HTTPX Value	
X=Select An Image Viewer (For further info, tab to entry	field, then F1)
Yellow Image Viewer types are OneLook-specific	
_ Y=Use Windows Associated Viewer _ N=Use RVI PC Vie	wer
_ V=Convert To PDF, Use RVI PC Viewer	
_ H=Convert To PDF, Hyperlink To Browser	
_ I=Index List in Browser, Display In Browser	
_ J=Index List in Browser, Display In RVI PC Viewer	
_ K=Index List in RVI PC Viewer, Display In RVI PC Viewer	
	API
_ L=No HLLAPI, Display in RVI PC Viewer	
M=Index List in RVI PC Viewer, Display in RVI PC Viewer, No	
O=Index List in Green Screen, View in OneLook, Using Pollin	g
_ P=Index List in OneLook, View in OneLook, Using Polling	
_ S=DataQue to Socket From Green Screen, No HLLAPI	
_ E=DataQue to Socket Using OneLook, No Polling	
_ F=DataQue to Socket Using Onelook, No Polling, Scanning To	Viewer
_ G=HLLAPI Support in Onelook, No Polling	
F1 =Additional Image Viewer Description	Enter =Continue

- 6. Press Enter to save then F3 to exit
- 7. Return to the RVI Image Menu using GO IMAGE.
- 8. Select **Option 1** Image Inquiry and specify an Image System ID Code.
- 9. Type the index values to be searched.

#### If Image Viewer = O

A sub file list of records will display on the IBM i matching the index search criteria. Put a **V** next to the record you want to view. The image will be displayed in One Look.

#### If Image Viewer = P

A sub file list of records will display in One Look that match the index search criteria. Double click the record you want to view. The image will be displayed in One Look.

#### One Look Configuration:

For Polling to run, the Image Systems <u>or</u> Index Search window must be active. (Host Connected) will display at the top of the window when polling is running. Polling will automatically run every 2 seconds.

				Image Inquiry (Host Connected)	
				Index Search	
				Z-COURT DOCUMENTS AND EXHIBITS	Ch
mage Inquiry <mark>(</mark> I	Host Connected)		«	CASE #	
Image Systems	5	V Menu 🗸	~	FILE DATE	
Total Systems: 1	L			PLANTIFF	
System 🔺	System Name			DEFENDANT	
a	TEST SYSTEM	^		CASE TYPE	
b	PRO DOCUMENTS			COURT/JUDGE	
c	CASINO DEMO			DOCUMENT TYPE	
				From Date 🖸 To Date	
				Q Search ⊵ Functions -	

# 8.20.1. Scan With Polling

Allows customers to poll an interface to extract values from the screen in order to populate indexes at scan time. A call to program <u>MVC013 or MVC013D</u> from your interface will initiate the scan process and pass the specified index values using polling between OneLook and your interface.

The internet user id must be enrolled in Maintenance Menu, <u>Maintain PC Workstation</u> <u>Configuration</u> as Image Viewer = **P** or **O** for polling.

Example: Using MVC013, the index values specified are automatically transferred to OneLook and the scan process is initiated.

Image Scanning Index Definition Scree	
	UDDSIDX7/REQUEST
This Program Allows You To Assign 1	Indexes To New Images Being Scanned.
Page Up Or Down For Additional Inde	exes Defined For This Image System.
COURT DOCUMENTS	S AND EXHIBITS
CASE #	<u>050318</u>
FILE DATE	04/03/17
PLANTIFF	J JACKSON
DEFENDANT	K LYN
CASE TYPE	0
COURT/JUDGE	DAVIS
DOCUMENT TYPE	PETITION
F3 =Exit F12 =Cancel F11 =Upload	PageUp/Down =Addl Idxs Enter =Continue
мА в	10/041
	10/041

age Inquiry (Host Connected)	COURT	DOCUMENT	S AND EXHIBI	15				0?¢
ndex Search Venu 🗸		Page 1	of 1 🕨 🕨	🛛 🤔 Display	ying 1 - 1 of 1	Display (	Checked	Show Row Numl
-COURT DOCUMENTS AND EXHIBITS 🔲 Change System	Fl	CASE #	FILE DATE	PLANTIFF	DEFENDA	CASE TYPE	COURT/J	DOCUME
ASE #: 050318								
ILE DATE: 04/03/17	] L	050318	04/03/17	J JACKSON	K LYN	0	DAVIS	PETITION
LANTIFF: J JACKSON								
EFENDANT: K LYN								
ASE TYPE: O								
OURT/JUDGE: DAVIS								
OCUMENT TYPE: PETITION								
From Date								
Search 🔀 Functions 🗸 🖉 Clear								
				ser Id: MCKENZ		© Real Vison 9		

## 8.21. Previous Version

For RVI customers upgrading to Version 9.0, the option to view a Previous Version is available.

Documents that have been versioned in prior releases of RVI will be accessible via the One Look interface. Users can select the Previous Version button to access and display the previous version(s) of the document.

If a document has a previous version, a  $\mathbf{V}$  will appear in the Flags column.

	RI DOC	UMENTS AND EX	HIBITS					; ∉
	Pag	e 1 of 1 🕨	🕅 🔊 Displa	ying 1 - 1 of 1	🔄 Retri	eve Request 🛛 D	isplay Checked	Display Options 🗸
Fla		CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
		031619	01/29/2019	V VERSION	P VERSION	0	J MILES	JUDGEMENT

- 1. Double click the record.
- 2. Select Previous Versions button.
- 3. Once the View Previous Versions grid opens:
  - Enable View Original Version to display the original document.
    - OR
  - Double-click the desired record for the version you want to display.

				1 1 1 1		
ndex Search		Menu 🔹	Notes 👻			
Z-COURT DO	CUMENTS AND EXHIBIT	rs 🗐 Ch 🕧 🕧	Details			2
031619		<b></b>	Maintenance			
FILE DATE			Email	CIVIL SUIT NUM Division	BER 241,780	
PLANTIFF			Routing -	JONATHAN CHASE JARRED	9TH JUDICIAL DISTRICT COURT	
DEFENDANT		R	Audit Information	VERSUS	PARISH OF RAPIDES	
CASE TYPE			Append Scan	TARA ST. ROMAINE JARRED	STATE OF LOUISIANA	
COURT/JUDG	GE		Add Redaction	FIRST SUPPLEMENTAL AN	DAMENDING PETITION	
DOCUMENT 1	TYPE	Idd	Previous Versions	L		
			Previous Versions	The allegations of plaintiff's original	Petition for Divorce and Other Relief are	
	TYPE		Download	The allogations of plaintiffs original reiterated and effirmed save and except as m		
From Date	To Date	Clear	Download Add to Temporary	The allegations of plaintiffs original reiterated and affirmed save and except as m II.	ay be inconsistent herewith;	
From Date	To Date	Clear	Download	The allegations of plaintiffs original reiterated and affirmed save and except as m III. That your petitioner desites to amend		
From Date	To Date	Clear	Download Add to Temporary	The allegations of plaintiffs original reiterated and effirmed save and except as m iii. That your petitioner desires to emend adding paragraph 19 to read as follows: "19	ay be inconsistent herowith; his Petition for Divorce and Other Relief by	
From Date	To Date	Clear	Download Add to Temporary Display Temp Grid	The altegations of plaintiffs original reiterated and affirmed save and except as m ii. That your petitioner desires to amend adding paragraph 19 to read as follows: "19 The defendant has recently of	ay be inconsistent herowith; his Petition for Divorce and Other Relief by schibited volatilie and iematic	
From Date	To Date	Clear	Download Add to Temporary Display Temp Grid	The allegations of plaintiffs original reiterated and effirmed save and except as m iii. That your petitioner desires to emend adding paragraph 19 to read as follows: "19	ay be inconsistent herewith; his Petition for Divorce and Other Relief by shibited votatile and ierratic your petitioner shows that it	
From Date	To Date	Clear	Download Add to Temporary Display Temp Grid Retrieve Request	The allegations of plaintiffs original reiterated and affirmed save and except as m II. That your petitioner desires to amendi adding paragraph 19 to read as follows: 19 The defendant has recently o behavior and mood twings and	ay be inconsistent herewith; his Petition for Divorce and Other Relief by shibited votatile and ierratic your petitioner shows that it	· · · · · · · · · · · · · · · · · · ·
From Date Q Search	To Date	Clear	Download Add to Temporary Display Temp Grid Retrieve Request	The allegations of plaintiffs original reiterated and affirmed save and except as m III. That your petitioner desires to amend adding paragraph 19 to read as follows: 19 The defendant has recently o behavior and mood twings and would be in the best interest of	ay be inconsistent herewith; his Petition for Divorce and Other Relief by shibited votatile and ierratic your petitioner shows that it	
From Date Search Fiew Previous Close V	To Date	Clear	Download Add to Temporary Display Temp Grid Retrieve Request	The allegations of plaintiffs original reiterated and affirmed save and except as m III. That your petitioner desires to amend adding paragraph 19 to read as follows: 19 The defendant has recently o behavior and mood twings and would be in the best interest of	ay be inconsistent herewith; his Petition for Divorce and Other Relief by shibited votatile and ierratic your petitioner shows that it	
DOCUMENT 1 From Date Search	To Date	Clear Clear	Download Add to Temporary Display Temp Grid Retrieve Request hage ID:ZAAAADTX	The allegations of plaintiffs original reiterated and affirmed save and except as m II. That your petitioner desires to amend adding paragraph 19 to read as follows: "19 The defendant has recently behavior and mood twings and would be in the best interest of	ay be inconsistent herewith; his Petition for Divorce and Other Relief by schibited volatile and erratic lyour petitioner shows that it the children for the Court to	

Versioning of newly scanned documents is not currently available. RVI is working to add this feature to Version 9.0. Please check the <u>RVI website</u> for updates.

# 8.22. Redaction

To watch a video on this topic CLICK HERE

Redact an area of an image (*Image must be stored as Type B*) using an opaque highlighter from the RVI PC Viewer.

add redaction, they cannot us Display an image in One Look. Select Add Redaction to dis		in the RVI PC Viewer		
Image Inquiry	Back	•		~
Index Search	Notes -			
Z-COURT DOCUMENTS AND EXHIBITS	Details			
241780	Maintenance			
FILE DATE	Email		UMBER 241,780 tion "A"	
PLANTIFF	Fax	JONATHAN CHASE JARRED	9TH JUDICIAL DISTRICT COURT	
DEFENDANT	Routing -	VERSUS	PARISH OF RAPIDES	
CASE TYPE	Audit Information	TARA ST. ROMAINE JARRED	STATE OF LOUISIANA	
COURT/JUDGE	Append Scan	FIRST SUPPLEMENTAL	AND AMENDING PETITION	
DOCUMENT TYPE	Add Redaction	The allegations of plaintiff's origin	I. al Petition for Divorce and Other Relief are	
From Date 🖸 To Date	Download	reiterated and affirmed save and except as	s may be inconsistent herewith;	1
🔍 Search 🖾 Functions 🗸 🖉 Clear	Add to Temporary		II. nd his Petition for Divorce and Other Relief by	
	Display Temp Grid	adding paragraph 19 to read as follows:		
	Retrieve Request		*19. y exhibited volatile and erratic	
			and your petitioner shows that it t of the children for the Court to	
		order a psychological evalua	ation of both parties by a mental	
		health professional selected be in the best interest of the	by the Court, and that this would children."	
		WHEREFORE, YOUR PETITIONE	D DRAYS.	
Ima	age ID:ZAAAADKS	1. That this amended pleading	be deemed good and sufficient and be ordered	<b>,</b>
		filed:		

- 3. Click the redaction button **I** in the RVI PC Viewer
- 4. Draw your redaction box around the area(s) you want to redact. (See Redaction Adjustment section

below for details on moving or deleting redaction.)

5. Click Accept when you are finished.

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1 🗆 🔍 🔿 🗰 🕇 👘	‡ 🔨 🖪	A	pproved	1		-					
Redaction Accept Form       Redaction         COURT DOCUMENTS AND EXHIBIT       Accept         Accept       Accept         Click the Redaction button then draw a box around the image you want to redact, wattiple areas to redact, y additional boxes.         When complete, click Accee the redaction by clicking Down and the redaction by clicking Down areas to redact.         Redaction can be done in wounder Image, Preferences, 'Redactions Black (checked (unchecked)'.	on the too e area of t If you hav ou can dra pt or disca o Not Acce white or bla General,	cept Ibar che e w rd pt. ack.			The alia; reitonaled and a That you adding paragray . Th be write . Th be write	ASE JARRE AINE JARR FIRST SUP ations of pl firmed save r petitioner d in 10 to react the determinant havier and e uid be in the der a psycho all the server sin the best in the best roore, YOU nat the praye cleft is relien rewrith; nat the praye cleft is relien rewrith; nat the praye cleft is relien rewrith; nat the praye	D ED PLEMENTAL aint/IT's origin and except a estres to arme as follows: t has necerf incide swings a best interess incide swings best interess as follows: t has necerf incide swings a best interess as follows: t has necerf incide swings a best interess as follows: t has necerf incide swings a best interess as follows: as follows: t has necerf as follows: t has necerf incide swings a best interess as follows: t has necerf incide swings a best interess as follows: t has necerf incide swings a best interess as follows: t has necerf as follows: t has follows: t has necerf as follows: t has necerf as follows: t	AND AMEN I. all Postoon a may be in- il, all Postoon a may be in- il, and his Petto "19, by eshibited and your pet of the child and your pet of the child and of the child and and and and and and and an	TH JUDICI F 31 IDING PETIT for Divorce consistent for sconsistent for votatic an efficient above den for Divorce votatic an efficient above den for the parties by a t, and that the good and ex- parties by a t, and the good the good and the good an	and Other Relic rewith; se and Other Rel d erratic vs that it Court to a mental	DES ANA f aro ef by derod Other internt
BC/OCR Ready	Document 1	of 1	C:	\RVI\C	ACHE\1/	VAAL42	H.001		Co	onnected	Internet

Wait until the viewer completely clears the image to ensure the redaction process is complete.

## **Redaction Adjustment:**

To move or delete redaction, use the **Select Tool** from the RVI PC Viewer toolbar. When the Select Too is active, the user can click on an existing redaction. This will enable the field and handles will appear around the edges of the redaction box. The user can press *DELETE* on their keyboard to remove the redaction or drag the redaction to a different location on the page.

When the changes are complete, click **Accept**.

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Image View Scan Print Page	e Host	
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R Select Tool Compt Form		<ul> <li>A 1 2 3 4 8</li> </ul>
		CIVIL SUIT NUMBER 241,780 Division "A"
Accept	Do Not Accept	JONATHAN CHASE JARRED 9TH JUDICIAL DISTRICT COURT VERSUS PARISH OF RAPIDES
		TARA ST. ROMAINE JARRED STATE OF LOUISIANA FIRST SUPPLEMENTAL AND AMENDING PETITION
		I. The allegations of plaintiffs original Petition for Divorce and Other Relief are
		reiterated and affirmed save and except as may be inconsistent herewith:
		That your petitioner desires to amend his Patition for Divorce and Other Relief by adding paragraph 19 to read as follows: "19.
		The detendant has recently exhibited volatile and emitic behavior and mood swings and your petitioner shows that it would be in the best interest of the children for the Court to
		order a psychological evaluation of both parties by a mental health professional selected by the Court, and that this would be in the best interest of the children."
		De in the Desc interest of the comment.
		WHEREPORE, YOUR PETITIONER PRAYS: 1. That this amended pleading be deemed good and sufficient and be ordered find the same of the same o
		filed; 2. That the prayer of the petitioner's original Petition for Divorce and Other Relief is reletated and reaffirmed, save and except as may be inconsistent incoverb);
		That all a legations of the prayer are pleaded in the alternative were one may     be inconstant with another, and
		241780 03/15/2017 FIRST SUPPLEMENTAL (Document 1 Page 1 of 5)
BC/OCR Ready	Document 1 of 1	C:\RVI\CACHE\1AAAL42H.001 Connected Internet

## 8.23. Routing

To watch a video on this topic CLICK HERE

Routing: Sends the image to another user/profile based on the routes setup on the IBM i server. (The

## routing profile is setup by your system administrator.)

nage Inquiry	~		Back		
ndex Search	🔻 Menu 🕶	E	Notes 🗸		$  \Theta \oplus   \mathcal{F}$
Z-COURT DOCUMENTS AND	EXHIBITS 🗐 Cł	Q	) Details		
CASE #		E	Maintenance	JONATHAN CHASE JARRED VERSUS	9TH JUDICIAL DISTRICT COURT PARISH OF RAPIDES
FILE DATE			1 Email	TARA ST. ROMAINE JARRED	STATE OF LOUISIANA
PLANTIFF			Routing -		
DEFENDANT		F	oute To User		<u>D R D E R</u> and the allegations contained therein,
CASE TYPE		F	oute Using Profile	IT IS ORDERED that the First Su	pplemental and Amending Petition of JONATHAN
COURT/JUDGE		0	Add to Temporary	CHASE JARRED to filed heroin.	
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		•			FILE C. L
				PLEASE SERVE:	C C
				TARA 51: ROMAINE JARRED at her Beau Tere Apartments 920 Twin Bridges Rd. Apt. 119 Alexandria, IA 71303 (Defendant's cell phone number is: (31	
				C Descent of Desperatory Sectors States	

#### Once a document is Routed:

• The system will display 'R' next to the record.

2-CO	OURT DOCUM	IENTS AND EXHIBITS						0 ?
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-		CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
	Flags	×	×	×	×	×	×	
	NR	241780	03/15/2017	E ZEND	H POTTER	с	MONTOGUE	FIRST SUPPLEMENTAL
	NS	241780	03/15/2017	E ZEND	H POTTER	С	MONTOGUE	GARNISHMENT
	N	241780	04/22/2017	E ZEND	H POTTER	с	MONTOGUE	PETITION

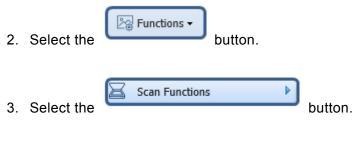
To work with items routed to your workbasket, select Menu, <u>WorkBasket</u> to access your workbasket.

Display Checked E Show Row Numbers G Grid to Excel
×
***

## 8.24. Scan

To watch a video on this topic CLICK HERE.

1. Select a system code. The scanned images will automatically be uploaded to the system code the user is currently logged into.



- 4. Select one:
  - a. Scan Using Indexes Above (Twain Scanner) (Uses Scan Direct)
  - b. Scan Using Indexes Above (Uses Scan Direct)
  - c. <u>Scan Using A Profile</u> (Performs Based on the Scan Profile Settings)

mage Inquiry Index Search		V Menu		
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PLANTIFF				
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COURT/JUDGE				
DOCUMENT TYPE				
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	Scan Functions	Þ		Scan Using Indexes Above(Twain Scanne
	Drag Drop/Import F	unctions 🕨		Scan Using Indexes Above
	C Batch Indexing		8	Scan Using A Profile
	OCR Word Search		(†	Upload Scanned Documents
	👫 🛛 Additional Index Filt	er	-	

One Look requires the **RVI PC Viewer** (8.1.1389 or newer) for scanning.

To watch a video on this topic <u>click here</u>.

# 8.24.1. Scan Using Indexes Above (Twain Scanner)

- This function requires *RVI Sockets.exe* and IBMi program *rvweztoimf.pgm*. Contact <u>Real</u> <u>Vision Software</u> for details.
- 1. Type the desired index values into the index search window. (You MUST supply at least one index.)

Index Search		Menu -	
Z-COURT DOCUM	IENTS AND EXHIBITS	🔲 Change System	
100418		×	
FILE DATE			For Twain
PLANTIFF			scanning to work, the
DEFENDANT			Socket must
CASE TYPE			be connected
COURT/JUDGE			
DOCUMENT TYPE	E		
From Date	To Date		
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elect the	nctions - button.		

4. Choose Scan Using Indexes Above (Twain Scanner).

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🕐 Batch Indexing 🕹 Scan Using A Profile	Indexes Above	Scan Using Index		/Import Functions 🕨	Drag Drop/		
	A Profile	Scan Using A Pro	8	exing	C Batch Inde		
<ul> <li>OCR Word Search</li> <li>Additional Index Filter</li> </ul>	nned Documents	Upload Scanned	(r)	Search	_		

The twain interface (specific to the make/model of the scanner) will pop up.

If the twain interface does not automatically pop up, verify the twain device is specified in the <u>RVI Socket</u> <u>Server</u> setup.

Once the scan option is selected from the twain interface, the image will be displayed inside the One Look browser interface.

EPSON Scan	- 🗆 X
EPSON Sca	Mode: Professional Mode ~
Settings	
Name:	Current Setting ~
	Save Delete
Original	^
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Document Source:	ADF - Single-sided 🗸 🗸
Auto Exposure Type:	Document ~
)	~
Ereview Thumbnail Help Con	figuration

5. Select Accept to save the scan or Cancel to reject the scan.

nage Inquir	y (Socket Connected)	«
Index Searc	h	🔻 Menu 👻
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# 8.24.2. Scan Using Indexes Above

1. Type the desired index values into the index search window.

~
Menu -
🧾 Change System
🖉 Clear

4. Choose Scan Using Indexes Above.

2.

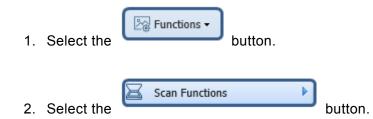
3.

mage Inquiry		«	
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	Drag Drop/Import Functions	E.	Scan Using Indexes Above
	Batch Indexing	8	Scan Using A Profile
	OCR Word Search	r	Upload Scanned Documents
	Additional Index Filter	-	

The RVI PC viewer must be **open** and **connected** to the scanner.

## 8.24.3. Scan Using A Profile

Provides the user with the ability to select predefined <u>scanning profiles</u> for this application.



3. Choose Scan Using A Profile.

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FILE DATE		•	
PLANTIFF			
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COURT/JUDGE			
DOCUMENT TYPE			
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	Scan Functions		Scan Using Indexes Above(Twain Scanner
	Drag Drop/Import Functions		Scan Using Indexes Above
	C Batch Indexing	8	Scan Using A Profile
	OCR Word Search	ſ.	Upload Scanned Documents
	📇 Additional Index Filter	-	

4. Choose a scan profile from the list of available profiles.

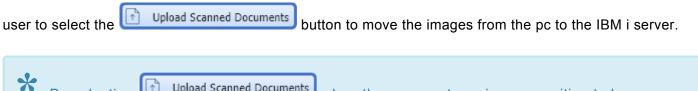
One Look							
Image Inquiry	Image Inquiry «						
Profile Search		Menu 🕶					
K Back							
Name 📥	Syst	Short Name					
COURT DOCUMENTS FOR S	Z	COURT DOCU					

The RVI PC viewer must be **open** and **connected** to the scanner.

# 8.24.4. Upload Scanned Documents

Scan Using Indexes Above <u>does not</u> require an upload. These scans are set to scan direct to the IBM i server.

Scan Using A Profile can be setup to scan direct or as a scan upload. The scan upload option requires the



By selecting Upload Scanned Documents when there are not any images waiting to be uploaded does NO harm.

# 8.25. Spool File

One Look allows for the display of spool files. Spool files are designated with Type **SPOOL**.

_	J-11551	ON IMAGES								23
14	F	Page 1 of 1		Displaying 1 - 138	of 138		💆 D	isplay Checked	Display Opti	ions 🕶
	Flags	DEPARTMENT	REPORT ID	TITLE	DATE	DOC TYPE	TYPE 🔻	CREATE-DATE	PAGES	
		ACCOUNTING	12345	BILL W OVER	01/09/2005	MAV3	SPOOL	2017/08/16	001	_
		HUMAN RES	1	INSURANCE	01/04/2005	GROUPBIL	SPOOL	2017/08/16	001	1
	R	KOA ENGINE	CG05050	NEW ORDER	06/30/2016	ICG05050	SPOOL	2017/08/14	023	
	R	KOA ENGINE	GENP072	EXCEPTION	2016/11/07	INVOICE	SPOOL	2017/08/14	009	
	R	KOA REPORT	EXPORTS	PROBLEM ONE	01/03/2018	KOA1	SPOOL	2018/01/03	001	

# 8.25.1. Display

Spool files will be displayed in the right window pane in PDF format.

nage Inquiry	(**)	•	Back				
Index Search	V Menu -	È	Notes			DEMO ERAN:	
3-ADMISSION IMAGES	Change System	Ð	Details				
DEPARTMENT		¢	Maintenance		ACCOUNT NUMBER NAME	NUMBER NAME	NUMBER NAME TYPE
REPORT ID	~		Email		8511772 HERMS 8788695 ANTHO	8077230 VICTOR AMRETTA 8511772 HERMAN MUNSTER 8788695 ANTHONY SMITH	8511772 HERMAN MUNSTER CHECK 8788695 ANTHONY SMITH SUBFILE
TITLE		1	Routing	-	8966874 LEAR 8368564 MARE	8955785 JUDI REPETO 8966874 LEAR MOLAND 8968564 MARE BAFER 8971879 CHELSEA GUILLOT	8966874 LEAH NOLAND 8968564 MARE BAFER
From Date  Through Date		<b>X</b> , /	Audit Information		8995641 MARI 8995641 RALPS 8998321 VEROS	0988741 MARIE MCCRARY 8995641 RALPH ESTANLITO 0990321 VERONICA GREER	8988741 MARIE MCCRARY 8995641 RALPH ESTANLITO 8998321 VERNICA GREER
DOC TYPE	~	1	Spool Search		8999985 DEBRJ	8999564 LOUISE CRANE 8999765 LEE MCCRARY 8999585 DEBRA REDFORD 8999510 MONTEL SANCHEI	8999765 LEE MCCRARY 8999985 DEBRA REDFORD
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Search 🛛 🖓 Functions -	<u> </u>				\$00000 RICK \$00010 Figure \$00110 Figure \$00110 Figure \$00110 Figure \$00010 Figure \$000000 Figure \$0000000 Figure \$000000 Figure \$00000 Figure	899999 THREA. TOOLE 800000 RICLARD RACTOR 9000000 RICLARD RACTOR 9000000 RICLARD RACTOR 9000000 CHRIST TWALK 9000000 CHRIST RACTOR 9000000000000000000000000000000000000	900051 RICHARD ROCCH 900051 RIAN BARTEN 900051 RIAN BARTEN 900051 RIAN BARTEN 900051 RIAN BARTEN 900051 RIAN BARTEN 900051 RIAN BARTEN 900054 LIAN BARTEN 900054 LIAN BARTEN 900054 LIAN BARTEN 900052 RIAN BARTEN 900052 RIAN BARTEN 900052 RIAN BARTEN 900052 RIAN BARTEN 900053 RIAN BARTEN 900055 RIAN BARTEN 900055 RIAN BARTEN 900055 RIAN BARTEN 900055 RIAN BARTEN 9000

For viewing large spool files, RVI recommends enabling Display AS400 Spool Format.

Multiple spool files can be viewed simultaneously by placing a check mark next to the record then click **Display Checked**.

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	Pa	ge 1 of 1	🕨 🕅 ಿ Displa	ying 1 - 5 of 5 Ite	ms selected: 3		🛐 Reti	rieve Request 🚺 I	Display Checked	Display Options 🗸
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	Flags									
	N				OCRSPL			SPOOL	2019/04/04	009
	N				OCRSPL			SPOOL	2019/04/04	001
					OCRSPL			SPOOL	2019/04/07	024
✓					OCRSPL			SPOOL	2019/04/11	002
					OCRSPL			SPOOL	2019/06/04	009

### 8.25.2. Search and Extraction

To watch a video on this topic <u>CLICK HERE</u>.

Search for and extract specific information contained within the spool file. Allows for results to be displayed in PDF or Grid format.

mage Inquiry		<u>**</u>		Back				^	Options	Processin	0	
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011018			¢	Maintenance							h Criteria #1	
FILE DATE				Email					OR		h Criteria #2	
PLANTIFF			ē.,	Routing -					OR	Search	h Criteria #3	
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### Grid View:

Choosing the Grid format provides the option 'Grid to Excel' allowing the results to be downloaded to an Excel spreadsheet.

ES 1	BRANCHING REPORT 01-03	-2005			
					Grid to Ex
	ACCOUNT NUMBER	NAME	BRANCH TYPE	AMOUNT	
[	×	×		×	×
1	8077230	VICTOR AMRETTA	COLOR PHOTO	65.47	
2	8511772	HERMAN MUNSTER	CHECK	147.95	
3	8788695	ANTHONY SMITH	SUBFILE	572.41	
4	8955785	JUDY REPETO		95.63	
5	8966874	LEAH NOLAND		857.21	
6	8968564	MARK BAKER		45.75	
7	8971879	CHELSEA GUILLOT		472.63	
8	8988741	MARIE MCCRARY		250.50	
9	8995641	RALPH ESTANLITO		75.65	
10	8998321	VERONICA GREER		99.98	
11	8999564	LOUISE CRANE		89.32	
12	8999785	LEE MCCRARY		79.35	
13	8999985	DEBRA REDFORD		15.25	
14	8999910	MONTEL SANCHEZ		81.20	
15	8999915	FRED BOUDREAUX		52.36	
16	8999925	MAC MCDOUGAL		28.35	
17	8999945	WAYNE SMITH		5.02	
18	8999987	BROOK LACEY		501.10	

To specify specific lines and columns to include in the Grid/XLS view, setup a XLS Specification by user and/or profile.

From an IBM i command line, type GO IMAGE

**RVILIB** must be in your library list. To add RVILIB to your library list, type **ADDLIBLE RVILIB** from an IBM i command line.

- 1. Select 3: Spool File Menu
- 2. Select 2: Maintain Form Profile
- 3. F10 = XLS Specs
- 4. F9 = Add Record

Maintain XLS Specifications (c)Copyright RVI 1992, 1999 RVXLSFM/RECDSP
User: <u>*ANY</u> Profile: <u>BRANCH</u>
When selecting lines for XLS file, start at line <u>009</u> and end at line <u>066</u>
Use lines <u>006</u> <u>007</u> <u>000</u> as heading lines
Extract up to 15 columns from the selected lines as follows:         Str End       Str End       Str End       Str End       Str End         01 009 015       02 017 037       03 038 065       04 064 072       05 000 000         06 000 000       07 000 000       08 000 000       09 000 000       10 000 000         11 000 000       12 000 000       13 000 000       14 000 000       15 000 000
Optional specifications: Include lines if: Pos 009 of detail line is EQ/NE <u>NE</u> to the value <u>*BLANKS</u> And/Or (AN/OR) (Optional) *BLANKS = a blank Pos 000 of detail line is EQ/NE <u>EQ</u> to the value
*BLANKS = a blank Delete Code: _ (D to Delete)
F3 =Exit F12 =Cancel Enter =Continue
MA B 06/052

### 8.26. Stapling

**Stapling:** Allows for the grouping of images into a bundle. RVI offers automatic and manual stapling of documents.

### 1. Automatic Stapling

The bundling process occurs at scan-upload time or during batch-indexing. This option displays a list of the images that are stapled to the primary document. (*Stapling is setup by your system administrator.*)

### If the primary document is stapled to another image:

• The system will display 'S' next to the record.

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• The button

will be available.

Stapling

• Click the Stapling button to see a list of the documents that are stapled to the primary document. Double click the record to view the stapled documents.

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For further details on Automatic Stapling and the setup requirements, refer to Chapter 18 (Auto-Stapling) in the <u>RVI 90 IBMi User Manual</u>.

2. **Manual Stapling** The bundling process is triggered by the user adding a primary document and supporting documents from any available system code to the Staple Grid then selecting the Finalize button from the Staple Grid.

To watch a video on this topic CLICK HERE

These buttons operate under the rules of option security. If a user doesn't have authority to staple, they cannot use this feature.

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Repeat the step above using any available system code. Documents added to the Staple Grid after the primary document will be considered supporting documents. Supporting documents will automatically display when the Primary document is viewed.

When you are ready to finalize the staple process, select Display Options, Display Staple Grid. Select Finalize Staple to complete the staple process.

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# 8.26.1. Add Additional Documents to a Stapled Bundle

(Before you begin, the staple grid must be cleared. Select **Display Options/Display Staple Grid/Clear Staple Grid**.)

- 1. Right-mouse click the primary record. (The record with the **S** in the Flags column.)
- 2. Select Maintain Staple.

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The Staple Grid will open with a list of the existing documents in the stapled bundle.

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- 3. Navigate to the record you want to add to the stapled bundle.
- 4. Right-mouse click the record you want to add to the stapled bundle.

### 5. Select Add to Staple Grid.

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Stapled records do not have to belong to the same System. In this example, we are adding a document from System C to a stapled bundled in System Z.

6. Select Display Options / Display Staple Grid.

	)isplay Options 🗸
C.	Display Temporary Grid
Z	Display Staple Grid
123 3	Show Row Numbers
	Show Row Numbers Grid To Excel

7. Select **Finalize Staple** to add the new document to the existing bundle.

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Secondary (Seq 4 )	z	011319	04/24/2019	K ILES	O PAUL	E	W TIME

To view the updated bundle, display the primary document then select Stapling.

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Double-click an entry in the Staple Grid to view that document. The document will open in a new window.

# 8.26.2. Resequence Stapled Documents

(Before you begin, the staple grid must be cleared. Select **Display Options/Display Staple Grid/Clear Staple Grid**.)

- 1. Right-mouse click the primary record. (The record with the **S** in the Flags column.)
- 2. Select Maintain Staple.

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The Staple Grid will open with a list of the existing documents in the stapled bundle.

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3. Drag and drop the record to the new position in the sequence.

The Primary (Seq 1) can not be moved or overwritten.

4. Select Finalize Staple.

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The reorganization of the records is now complete!

# 8.26.3. Delete a Stapled Bundle

This will delete the entire stapled bundle.

(Before you begin, the staple grid must be cleared. Select **Display Options/Display Staple Grid/Clear** 

### Staple Grid.)

1. Right-mouse click the primary record. (The record with the S in the Flags column.)

### 2. Select Maintain Staple.

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s (	Add Notes	04/24/2019	K ILES	O PAUL	E	W TIME	PETITION
	Email Image	24/2019	K ILES	O PAUL	E	W TIME	PIC
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The Staple Grid will open with a list of the existing documents in the stapled bundle.

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3. Right-mouse click the record you want to remove.

#### 4. Select **Remove Record**.

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引 Close 🛛 🖉 Clear Staple	e Grid 🦟 Finalize Staple	2. Click Finalize	Staple to delete th	e stapled bundle.			
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econdary (Seq 3 )	Z	011310	04/24/2019	K ILES	O PAUL	E	W TIME

5. Click **Finalize Staple** to complete the deletion of the stapled bundle.

The staple flag **S** will be removed from the primary document.

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		011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER						
		011319	04/24/2019	K ILES	O PAUL	E	W TIME	PETITION						
		011319	04/24/2019	K ILES	O PAUL	E	W TIME	PIC						

# 8.26.4. Remove a Document from a Stapled Bundle

(Before you begin, the staple grid must be cleared. Select **Display Options/Display Staple Grid/Clear Staple Grid**.)

- 1. Right-mouse click the primary record. (*The record with the S in the Flags column*.)
- 2. Select Maintain Staple.

🖣 🖣 Pa	age 1 of 1 🕨	🕨 🕅 ಿ Displa	ying 1 - 4 of 4	🔄 Ret	rieve Request 🛛 🛛	Display Checked	Display Options
Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYP
Tiags							
]	011319	04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT
]	011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
S		24/2019	K ILES	O PAUL	E	W TIME	PETITION
	Add Notes Email Image	24/2019	K ILES	O PAUL	E	W TIME	PIC
			mouse click tl	he primary sta	pled record t	ien select Ma	aintain Stapl
	Linking Load Indexes Load Indexes Load Information Add to Temporar Maintain Staple Add to Staple Gri	Right-	mouse click tl	he primary sta	pled record t	ıen select Ma	aintain Stapl
	Linking Load Indexes Load Indexes Load Information Add to Temporar Maintain Staple Add to Staple Gri	Right-	mouse click tl	he primary sta	pled record t	nen select Ma	aintain Stapl

The Staple Grid will open with a list of the existing documents in the stapled bundle.

Image Inquiry		<b>**</b>	Z-C	OURT D	OCUMENTS AND	EXHIBITS					0 ? 0
Index Search	V	Menu 🗸	14	4 F	Page 1 of 1	🕨 🕅 ಿ Dis	playing 1 - 4 of 4	<b>S</b> . 1	Retrieve Request	Display Checked	Display Options -
Z-COURT DOCUMEN	TS AND EXHIBITS 📃 Change	system		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
011319			-	riags							
04/24/2019					011319	04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT
PLANTIFF					011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
DEFENDANT				S	011319	04/24/2019	K ILES	O PAUL	E	W TIME	PETITION
					011319	04/24/2019	K ILES	O PAUL	E	W TIME	PIC
CASE TYPE											
COURT/JUDGE											
DOCUMENT TYPE											
DOCOMENT TIPE											
From Date	To Date										
From Date											
		Clear	(PD	F)			121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date			(PD	F)		Device Id:\$00	121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date			(PD	F)			121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date	Functions •		(PD	F)			1121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date			(PD	F)			1121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date	Functions •		(PD	F)			1121748 User Id: M	ICKENZY		© Real Vison Software	e. All Rights Reserved
From Date	Functions •		(PD	F)	(FILE DATE)		1121748 User Id: M	ICKENZY (DEFENDANT)		© Real Vison Software	e. All Rights Reserved
From Date Search Manual Staple Grid Close @ Clear St	Functions ▼     ▲       aple Grid     ≪       Finalize Staple	2 Clear	(PD	F)	(FILE DATE) 04/24/2019		NNTIFF)				
From Date	aple Grid COURT DOCUMENTS AN	⊘ Clear (CASE #)	(PD	F)		(PL	NNTIFF) ES	(DEFENDANT)	(CASE		(COURT/JUDGE)

3. Right-mouse click the record you want to remove.

The Primary (Seq 1) can not be removed.

4. Select Remove Record.

							8
Manual Staple Grid							
🚫 Close  🖉 Clear Sta	aple Grid 🛃 Finalize Staple	2. Click Finalize	Staple to remove t	he record and updat	te the stapled bundle	•	
	(COURT DOCUMENTS AN	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
Primary (Seq 1)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
Secondary (Seq 2)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
Secondary (Seq 3 )	z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
	🔟 Remo	ve Record 1. Rig	ght-mouse click the	record you want to	remove. Select Rem	ove Record.	

5. Click **Finalize Staple** to comlete the removal of the record and update the stapled bundle.

# 8.27. Temporary Folder / Grid

To watch a video on this topic CLICK HERE

Temporary Folder provides a holding area where users can store a copy of any document from any system

to be used for temporary viewing and file comparison. The temporary folder is updated every time the user refreshes the page. (*The temporary grid is cleared automatically when the user logs off.*)

Documents can be added to Temporary Folder in 3 ways:

- 1. Place a check mark in the box next to the record(s), right-mouse click, select 'Add to Temporary'.
- 2. Right-mouse click a single line item, select 'Add to Temporary'.
- 3. View a document in the One Look PDF browser window, click 'Add to Temporary'.

#### Option 1:

From the sub-file list of search results, click the check box next to all items you want to include. Rightmouse click anywhere within the sub file list and select 'Add to Temporary'.

ndex Search Venu -	Iter	ns select	ed: 4 🛛 🗐 🗐	Page 1 of 1		Displaying 1 - 10 of 10	D 🖸	Display Checked	Display Options -
Z-COURT DOCUMENTS AND EXHIBITS		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
241780		riays							
FILE DATE			241780	01/02/2018	J JARRED	T JARFTO	-	MONTAGUE	DRAFT
		N	241780	03/15/2017	J JARRED	T JARF 🖹 Shov	v Notes	MONTOGUE	FIRST SUPPLE
PLANTIFF		N S	241780	03/15/2017	J JARRED	T JARF 🛨 Add	Notes	MONTOGUE	GARNISHMENT
DEFENDANT		NL	241780	04/22/2017	J JARRED	T JARI 🗹 Ema	il Image	MONTOGUE	PETITION
CASE TYPE			241780	07/24/2018	J JARRED	T JARF () Inde	x Details	BEAR	PICTURE
			241780	07/24/2018	J JARRED	T JARE TING	x Maintenance	BIRD	PICTURE
COURT/JUDGE			241780	07/24/2018	J JARRED	T JAR TTO	to Temporary	MONTOGUE	PICTURE
DOCUMENT TYPE			241780	07/24/2018	J JARRED	T JAR		MONTOGUE	PICTURE
From Date 🖪 To Date 🖪			241780	07/30/2018	J JARRED	T JARE Show	v In Window	MONTOGUE	PICTURE IMP
			241780	01/18/2018	J JARRED	T JARRED	с	J DOWNS	WORD

#### Option 2:

From the sub-file list of search results, right-mouse click a single record and select 'Add to Temporary'.

Index Search V Menu •	14	4	Page 1 o	f 1   🕨 🕅   🧬	Displaying 1 - 1	0 of 10	Dis	play Checked 📃 I	Display Options 🕶
Z-COURT DOCUMENTS AND EXHIBITS		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
241780		. logo							
FILE DATE			241780	01/02/2018	J JARRED	T JARRED	С	MONTAGUE	DRAFT
		N	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPL
PLANTIFF		N R	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT
DEFENDANT		NL	241780	04	1110000	T JARRED	с	MONTOGUE	PETITION
CASE TYPE			241780	07 🖹 Shov	Notes	T JARRED	С	BEAR	PICTURE
			241780	07 🛨 Add	Notes	T JARRED	с	BIRD	PICTURE
COURT/JUDGE			241780	07 🗹 Emai	Image	T JARRED	с	MONTOGUE	PICTURE
DOCUMENT TYPE			241780	07 (j) Inde	Details	T JARRED	с	MONTOGUE	PICTURE
From Date 🖪 To Date 🖪	. 🗖		241780	07 💿 Inder	Maintenance	T JARRED	С	MONTOGUE	PICTURE IMP
			241780	01 📑 Add	to Temporary	T JARRED	с	J DOWNS	WORD
🔍 Search 🔄 Functions 🗸 🖉 Clear					In Window				

### Option 3:

Display an image within One Look, select 'Add to Temporary' button.

age Inquiry	~		Back	IT IS FINALLY ORDERED that the ex parts order had been denied and the parties
dex Search	🚩 Menu 🗸	Ē	Notes -	shall share the physical custody of the minor children in the following manner:
OCUMENTS AND EXHIBITS	Change	0	Details	Atternating Elever, 2 weeks with werken
241780			Maintenance	en setwen Eschipterty has dight of first
TLE DATE			🛛 Email	STANDING ORDER FOR PRETRIAL CONFERENCES
LANTIFF			Routing -	IN FAMILY LAW MATTERS
EFENDANT		3	🕽. Audits 🝷	I. The Ninth Judicial District Court has Ordered that a Pre-Trial conference be held in
ASE TYPE			Linking	this matter, in accordance with an evaluation program being conducted by the
OURT/JUDGE		6	Append Scan	Court. The purposes of the Pre-Trial Conference are:
DOCUMENT TYPE			Download	A. To discuss a resolution of any or all of the issues between the parties, without the necessity of a hearing;
rom Date 🔄 To Date	2 Clear		Add to Temporary	<ul> <li>B. To resolve any Preliminary Motions or Exceptions which may dispose of the need for a hearing of the pending hearing:</li> <li>C. To resolve any issues affecting preparation for the Trial of the hearing;</li> <li>D. To discuss rescheduling the hearing to the earliest possible date which allows all parties to adequately prepare for the hearing; and</li> <li>E. To enter an Order or Judgment as to all matters which can amicably be resolved without the necessity of a hearing on the issues pleaded.</li> <li>II. All parties and their attorneys (if any) must attend the Pre-Trial Conference.</li> </ul>
			Image ID:ZAAAADKQ	

The Temporary Grid can be displayed by selecting Display Options, Display Temporary Grid from the top right-hand corner of the One Look window OR display a document from any system and select Display

### Temp Grid from the <u>left side functions</u>.

	isplay Options 🗸
5	Display Temporary Grid
1 2 3	Show Row Numbers
×	Grid To Excel
Ξí	User Activity Chart

### **Temporary Grid Features:**

emporary Grid							
Close 🖉 Clear Tempora	ary Grid 💿 View Select	ed 📃 Combine					
(ADMISSION IMAGES)	(DOC TYPE)	(DEPARTMENT)	(REPORT ID)	(TITLE)	(DATE)	(NOT USED)	(NOT USED)
3		E9					
(HR WORKFLOW SYST	(DOCUMENT TYPE)	(EMPLOYEE # 💼	Remove Record	(DEPT)	(NOT USED)	(NOT USED)	(NOT USED)
U	BC	1450	07/30/2015	MAINT			
(COURT DOCUMENTS	(DOCUMENT TYPE)	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
] Z	PICTURE	241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE

Clear Temporary Grid: Removes all items from the temporary folder and grid.

**Remove Record:** Remove items from the temporary folder and grid by right-mouse clicking a line item and selecting Remove Record.

**View Selected:** Select the desired records by placing a check mark in the box to the left of the record then click View Selected to display the chosen records.

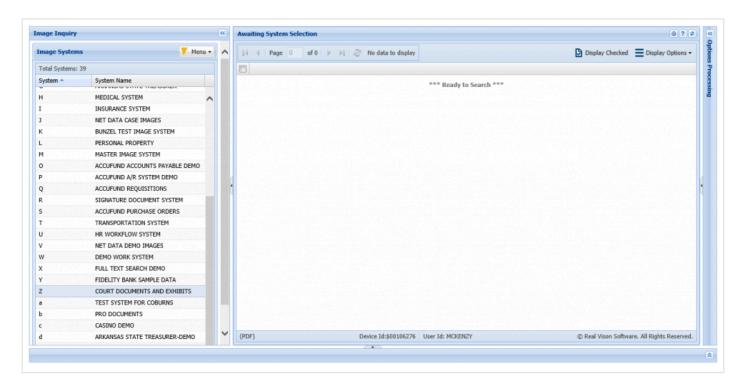
**Combine:** Enabled the check box to combine all documents in the temporary folder into a single PDF then click View All to display the PDF.

### 8.28. View

To watch a video on this topic <u>CLICK HERE</u>.

1. Using a single mouse click, select a system code for inquiry.

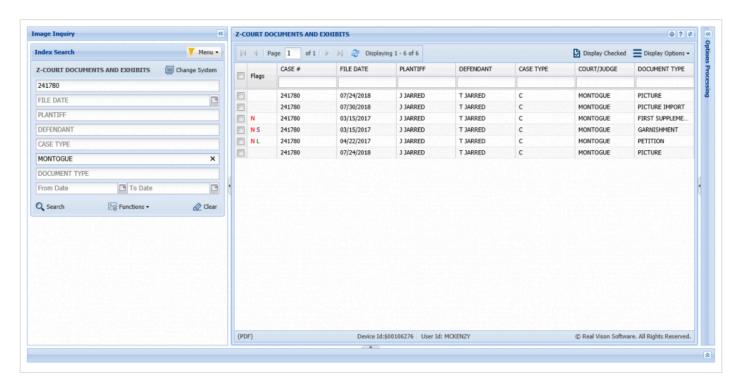
O Search



When a system code is selected, the One Look interface will bring up the available index fields. Based on the parameters setup in system code maintenance on the server, the user should enter one or more index values to narrow down the image inquiry search. From Date / To Date provide the ability to limit a search to

specific date ranges based on creation date. If no index is required, the user can select the button to view ALL images in the system code.

		••	Z-COURT D	OCUMENTS AND EX	CHIBITS					۵ ?
Index Search		🔻 Menu 🕶	14 4 1	Page 0 of 0	🕨 🕅 🥭 No data to di	splay			Display Checked	Display Options
Z-COURT DOCUME	NTS AND EXHIBITS	Change System	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #										
FILE DATE						*** 1	Ready to Search ***			
PLANTIFF										
DEFENDANT										
CASE TYPE										
COURT/JUDGE										
DOCUMENT TYPE										
From Date	To Date		•							
Q Search	2 Functions -	🖉 Clear								
			and the second second							



Cone Look will list up to 800 records per page. To view additional records, click the arrow buttons at the top of the window to move to the next page.

Use filtering to limit the number of records. For each index column displayed, there is a space to filter the

🖄 Functions 🗸

total items displayed in the sub file list. For example, if in the DOCUMENT TYPE column the user entered PETITION, the sub file list results would only show those items with PETITION in the DOCUMENT TYPE field.

Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
riags							PETITION

A	dditional index filtering is a	va	ilable under the Image Inquiry, Index Search,
	🖧 Functions 🗸		
é	Scan Functions	Þ	
Ċ	Drag Drop/Import Functions		
5	🕐 Batch Indexing		
	OCR Word Search		
ł	👫 Additional Index Filter		
	Additional Index Filter		
	Black/White Image Types		7
	Reports Image Types		
	External Image Types		7
	Color Image Types		

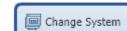
In	clude Only Items Routed		
In	clude Only Noted Items		
2.	Double click the imag	e to be viewed o	or selec
	then click the Display	Checked buttor	When

 Double click the image to be viewed or select multiple check boxes for the items you want to display then click the <u>Display Checked</u> button. When Display Checked is used, the user will have the Combine PDF button to temporarily combine and display images (not Office documents) as a single PDF. The Combine PDF can be set as the default by going to <u>Settings</u>.



Image Inquiry 🤇	*19.	^
Index Search 🔰 Menu 🗸	The defendant has recently exhibited volatile and erratic     behavior and mood swings and your petitioner shows that it	
	would be in the best interest of the children for the Court to	
Z-COURT DOCUMENTS AND EXHIBITS	Details     order a psychological evaluation of both parties by a mental	
241780	Maintenance health professional selected by the Court, and that this would	
FILE DATE	be in the best interest of the children."	
PLANTIFF	Routing -	
DEFENDANT	Audit Information WHEREFORE, YOUR PETITIONER PRAYS:	
CASE TYPE	Append Scan      That this amended pleading be deemed good and sufficient and be ordered filed:	
COURT/JUDGE	Add Redaction     Add Redaction     That the praver of the petitioner's original Petition for Divorce and Other	
DOCUMENT TYPE	Relief is reiterated and reaffirmed, save and except as may be inconsistent herewith;	
From Date 🖸 To Date 🖸	Add to Temporary     Add to Temporary     Add to Temporary     S. That all allegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and	
🔍 Search 🛛 🖓 Functions 🗸 🛷 Clear	Display Temp Grid     4. For all necessary orders and decrees.	
	Combine/PDF	
	Retrieve Request	
	Image ID:ZAAAADKS	~
	🔰 🖣 Page 2 of 4 🕨 🔰 🥲 Displaying 2 - 2 of 4	

By default, One Look displays images as PDF. Customers needing to view OEM documents (ie. Word, Outlook, Excel, Videos) or wanting to view scanned images in their original file format will need to install the <u>RVI PC Viewer</u> then set their <u>session settings</u> to RVI to Viewer.



button located in the top right corner of the Index

Move between systems by using the Search window.

### 8.29. Workflow

See WorkBasket

# 9. CUSTOM FUNCTIONS

Contact Real Vision Software to discuss custom functions.

# 9.1. Signature Capture

Contact <u>Real Vision Software</u> to discuss One Look Signature Capture setup.

Refer to Chapter 18 (Viewing: Signature Capture) in the <u>RVI 90 IBMi User Manual</u> for details on Signature Capture.

# 9.2. Z-Options

Contact <u>Real Vision Software</u> to discuss One Look Z-Option setup.

Setup for Z-Options is done from the IBM i green screen and a custom program is required.

Refer to Chapter 18 (Z-Option Menu) in the RVI 90 IBMi User Manual for details on Z-Options.

# **10. INTERFACE PROGRAMS (APIs)**

RVIINT.html - This will be used to pass several parameters into OneLook

- Parameters
  - USR This will be the user's internet login id Ex. "USR=Matthew" (REQUIRED)
  - PW This will be the password for the user's internet login Ex. "PW=realvision" (REQUIRED)

If Single Signon is being used then USR and PW are not required.

- ISYS System Code Ex. "ISYS=C" (REQUIRED)
- Index values These are the values of the indexes you want to search on. Ex. "I1=test&I2=test2&I7=Doc2" (NOT REQUIRED)
- Example Post
  - http://server.host/internet/cmnss/imageinquiry/app/ rviint.html?usr=matthew&pw=realvision&isys=C&i1=test&i2=test2&i7=doc2

**RVISS.html** – This will use active directory, single-signon, or Kerberos to access OneLook

- Parameters
  - No parameters needed. The "SHOWLOGIN" program is designed to pick up the username and password from the browser via single-signon, active-directory, or Kerberos
- Example Post
  - http://server.host/internet/cmnss/imageinquiry/app/rviss.html

#### RVIINTDEVD.html – This will use the Device Id assigned to a user to access OneLook

- Parameters
  - DEV This will be the id that is assigned to any user who is wanting to access OneLook
- Example Post
  - http://server.host/internet/matthew/cmnss/imageinquiry/app/rviintdevd.html?dev=\$00100528

**RVIINTDED.html** – This will use the Device Id assigned to a user to access Onelook, but will then mask it so that the Device Id is not visible in the browsers search bar.

• Parameters

- DEV In this call the Device Id is picked up from the initial window that calls on this interface.
   The post will be scanned for the phrase "DEV=" and then pick up the next 9 characters for the Device Id to pass into SHOWLOGIND for sign on.
- Example Post
  - The initial post will look something like this:
    - http://server.host/H/rvimain.pgm?rqstyp=SENCHCALL&dev=\$00148704
  - The program SENCHCALL will then execute:
    - window.location.assign("/internet/cmnss/imageinquiry/app/rviintded.html");
- From sencha we will extract the Device Id out of the window.document.referrer and proceed on with the login process.

# **11. POPULAR WEB CALLS**

Basic URL Structure: http://ipaddress:port/pgms/rvimain.pgm?rqstyp=

#### **URL Structure with Parameters:**

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=(executing\_program\_name)&(additional\_parameters)&

Parameters start with & and the URL ends with &

#### Executing Programs for RQSTYP

RVISYS	View (User chooses image system code and enters indexes.)
RVIKEYS	View by specified image system code (User enters indexes.)
RVISUBF	View by specified image system code and indexes
CALLRVIWEB	Direct view by specified image system code and indexes while hiding URL ( <i>Requires additional parameter PGM=DOC003QWET</i> )
RVWSCAN1N	Scan direct using specified image system code and indexes
RVISYSSC1	Scan with upload required (User chooses image system code and enters indexes.)
RVISYSSC3	Scan with upload required using specified image system code (User enters indexes.)
RVWSCAN00	Scan using scan profile ( <i>User selects scan profile</i> .)
RVWSCAN01	Scan using specified scan profile name
RVIUPL1W	Upload scanned images
RVBCHWR0	Batch index (User chooses image system code.)
RVIIMPTDW	Import drag and drop using specified image system code

#### Parameter Definitions used in Web Calls

<b>&amp;SELBOX</b> = scanning profile name	<b>&amp;DIRECTP =</b> Y direct view outside of internet
--	---

	frame
<b>&amp;OCX</b> = Y for viewing inside the internet frame within the RVI PC Viewer	<b>&amp;DELTYP =</b> <i>P</i> to view as PDF
<b>&amp;I1</b> through <b>I7</b> = index number	<b>&amp;SCOLOR</b> = Y for color, <i>N</i> for black white
&ISYS = image system code	<b>&amp;SOPT</b> = Y for scanning direct
<b>&amp;PROTECT</b> = Y for surpressing the display of the index entry screen	<b>&amp;RTNPGM</b> = <i>rviclosef</i> for clearing the RVI PC Viewer window after each scan
&USR = user name	&PW = password
&HOST = ipaddress:port	

#### **Examples By Function**

### VIEW

#### View Call – user chooses image system code and enters indexes:

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisys&deltyp=p&

#### View Call – pass in image system code and user enters indexes:

*Example below is image system code Z* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvikeys&isys=Z&deltyp=p&

#### View Call – pass in image system code and indexes:

*Example below is image system code Z, Index* 7 = *APP* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisubf&isys=Z&i7=APP&deltyp=p&

# Direct View By System/Transaction and hide URL (fields ABAACD and ABAANB from file RVILIB/RVABREP):

*Example below is system/transaction 1AAADNM7* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=callrviweb&pgm=doc003qwet&aaas=1AAADNM7&



#### Scan Direct – pass in image system code and indexes:

#### Requires an RVI Viewer properly configured for scanning.

Example below will scan an item to image system code 7 while suppressing the indexing screen and setting Index1 = JOHN, Index2 = SMITH, Index7 = APPLICATION then clearing the RVI PC Viewer after the scan. http://ipaddress:port/pgms/ rvimain.pgm?rqstyp=rvwscan1n&isys=7&i1=JOHN&I2=SMITH&I7=APPLICATION&ocx=Y&sopt=Y&protect=Y&rtnpgm

### Scan Upload Required (*color or black & white*) – user chooses image system code and enters indexes:

*Example below is a color scan* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisyssc1&scolor=Y&

Scan (color or black & white) – pass in image system code and user enters indexes: Example below is a color scan to image system code A, Index 1 = TESTSCAN, Index 2 = SCANTEST http://ipaddress:port/pgms/ rvimain.pgm?rqstyp=rvisyssc3&isys=A&I1=TESTSCAN&I2=SCANTEST&scolor=Y&

Scan Using Scanning Profile – user selects scan profile name from a list: http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan00&

Scan Using Scanning Profile – pass in the scan profile name: Example below is scan profile BTC http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan01&selbox=BTC&

### **UPLOAD**

Upload Scanned Images: http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rviupl1w&

### **BATCH INDEXING**

Batch Index – user chooses image system code: http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvbchwr0&

### **IMPORT DRAG DROP**

Import Drag Drop – user chooses image system code:

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rviimptdw&

### Import Drag Drop – pass in system code: *Example below is image system code Q* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rviimptdw&isys=Q&

# **12. TROUBLESHOOTING**

This section is dedicated to common errors and issues encountered with the setup, use, and maintenance of One Look. If you have any suggestions for additional topics that you feel would be helpful to other customers, please contact <u>Real Vision Software</u> support with the details.

### **12.1. OEM Documents Will Not Display**

#### Non Microsoft Office Documents

A message will occur stating the image is not available because the document could not successfully be converted to PDF.

### YOUR IMAGE IS NOT AVAILABLE

In this instance, select the option to view in the <b>RVI PC viewer</b> , by selecting the icon	۳	at the top right of
the display screen to toggle between PDF and Viewer.		

nage Inquiry			2-COURT DOCUMENTS AND EXHIBITS								
Index Search		Venu •	14 4 Pag	pe 0 of 0 ▶ 1	🗐 ಿ No data to display				Display Checked 🗮 Shi	ow Row Numbers 🔀 Grid to Ex	
Z-COURT DOCUMEN	ITS AND EXHIBITS	🗐 Change System	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE	
CASE #			_		×	×	×	×	×	×	
FILE DATE		•					*** Ready to Search ***				
PLANTIFF											
DEFENDANT											
CASE TYPE											
COURT/JUDGE											
DOCUMENT TYPE											
From Date	To Date										
Q Search	Functions +	@ Clear									
			(PDF)			Device Id:\$00088794 U	User Id: MCKENZY		© Rea	Vison Software, All Rights Reserv	

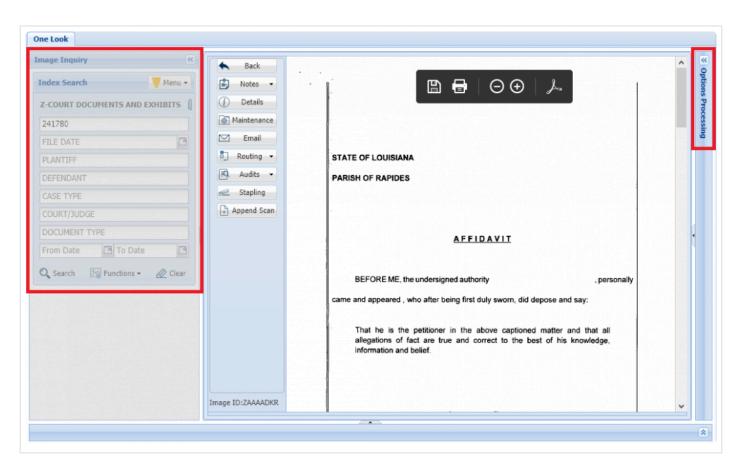
#### **Microsoft Office Documents**

The user will get a prompt in the browser to open the file.

Do you want to open or save BAAAAAA1.XLS	Open	Save 🔻	Cancel	×		
				,		

### **12.2. Index Search Window is Grayed Out**

When the option processing window is in maintenance mode, the index search window will be grayed out.



Expand the option processing window if it's not open already. Cancel out of the maintenance window. Now you will be able utilize the index search window.

Image Inquiry	<b>(</b>	Back		^	Options Processing	
Index Search		Notes •			Index Maintenance	
Z-COURT DOCUMENTS AND EXHIBITS		() Details			🔄 Update 🖉 Cancel	
241780		Maintenance			CASE #:	241780
FILE DATE	•	🗹 Email			FILE DATE:	03/15/2017
PLANTIFF		Routing -			PLANTIFF:	E ZEND
DEFENDANT		🗐 Audits 🔻	9 <sup>78</sup> JUDICIAL DISTRICT COURT IN AND FOR THE PARISH OF RAPIDES STATE OF LOUISIANA		DEFENDANT:	H POTTER
CASE TYPE		Stapling			CASE TYPE:	С
COURT/JUDGE		Append Scan	PILED: DEPUTY CLERK:		COURT/JUDGE:	MONTOGUE
DOCUMENT TYPE			ALDEDGEMENT FOR GARNERIMENT This matter having come on this date for trail and considering the homogatories proposeded, the asseers find by Generation and the law and evidence being favor of		DOCUMENT TYPE:	GARNISHMENT
From Date 🖪 To Date			played. JUDGEMENT READ, RENDERED, AND SKINED day ZJ day of April, 2012 in			
			Alexandra, Louisiana			
🔍 Search 🛛 🖓 Functions 🕶 🖉 Cle	ar		JUDGE, 9 <sup>8</sup> JDC			
		Image ID:ZAAAADKR		~		
					<	

### 12.3. Accept / Reject Screen Not Appearing After Scan

After scanning, if the Accept/Reject window does not automatically display in the RVI PC viewer, verify that the pane is not minimized to the left side of the screen. Place the cursor on the left edge of the RVI PC viewer window and drag the pane open.

应 RVI Im	iage Sy	ystem (	8											_		>	×
lmage V	iew	Scan	Print	ge ⊢													
5 İ	↔	ю	¢4	60	1	Æ	+	- M		•	M	Goto	6		<u>×</u>		IP
		Drag right	P	ge	1		ument 1		1 -6 1								
						(Doc	ument	r rage	I OF I	)							_
BC/OCR	Rea	dy		Do	cumen	it 1 of 1	1	C:	\RVI\(	CACHE		AADM	V.001	Conr	nected	Interne	et //

<sub> </sub>		– 🗆 X
Image View Scan Print Page		
5 \$ ↔ ∞ ₩	🖉 🌰 🗩 🕂	IA 🔺 🕨 M 🚮 🖨 🦁 🛣 🏢 IP
Scan Accept Form	~	
COURT DOCUMENTS AND EXHIBI	TS SYSTEM	Batch 1
		Dattini
Accept Continue	Do Not Accept	Page 1
		I uge I
	~	,
<	>	(Document 1 Page 1 of 1)
BC/OCR Ready	Document 1 of 1	C:\RVI\CACHE\ZAAAADMV.001 Connected Internet

# **12.4. IE Prompting to Save and Open PDF**

When attempting to view a document, IE requires the user to SAVE then OPEN the PDF ultimately delivering the PDF to Adobe Reader outside of One Look. This happens when IE security is set to 'Enable

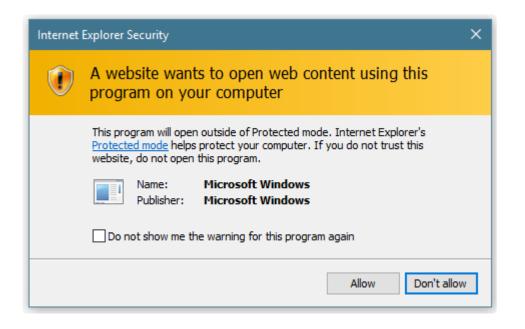
Protected Mode.' To disable 'Enable Protected Mode', open IE tools (ALT + X) or click 2, select Internet Options, Security tab.

Internet (	ptions					? ×
General	Security	Privacy	Content	Connections	Programs	Advanced
Select a	zone to v	iew or cha	inge securi	ty settings.		
		Ś		/ (	$\mathbf{S}$	
Inte	ernet L	ocal intrar	net Trust		stricted sites	
	Interne				Site	es
0		hose listed	ernet web in trusted		Unix	- 5
	ity level fo					
Allo		for this zo lium-higi	one: Mediu	m to High		
-	- A	Appropriat	e for most			
-		Prompts be ntent	efore down	loading potent	ially unsafe	
_	L	Unsigned A	ActiveX con	trols will not be	e downloade	d
	Enable Pro	otected M	ode (requi	res restarting I	nternet Exp	lorer)
			Cust	om level	Default	level
				Reset all zone	s to default	level
			Ok	Ca	ancel	Apply

### 12.5. Open or Save RVIMAINXML.PHP

Internet Explorer requires an installation of Adobe to view PDFs. When Adobe is not installed, the user will be prompted with the message below when attempting to view as PDF in One Look:

Do you want to open or save rvimainxml.php (47.3 KB) from 12.27.233.217?	Open	Save	-	Cancel	×	
	open	Jave		Cancer	1.0	



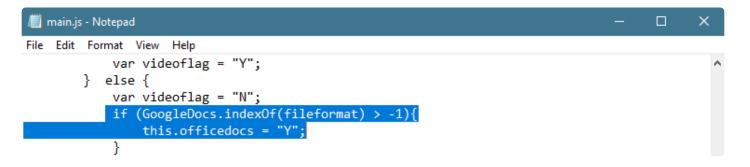
Google Chrome users should not receive these types of messages. Chrome has a built in plugin to view PDFs.

### **12.6. No Preview Available**

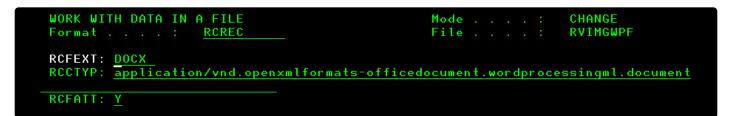
When attempting to internally view Microsoft Office documents, users are receiving the message 'No Preview Available'.

#### To Resolve the Message:

- From the IBMi server, navigate to: /cgibin/cmnss/imageinquiry/app/controller/main.jsd
- Open main.js. in notepad then search for: GoogleDocs.indexOf(fileformat)
- Locate the next line under GoogleDocs.indexOf(fileformat) this.officedocs = "Y";



- Change this.officedocs = "Y"; to:
   // this.officedocs = "Y"
- 5. From an IBMi command line type: UPDDTA RVIMGWPF
- 6. Set RCFEXT: to DOCX (or the appropriate Office file extension) then page down to access the record.



7. Set RCFATT: to Y

Alter all office file extensions: doc, docx, xls, xlsx, ema, eml <u>OR</u> only the selected extensions you will use in One Look.

Google Chrome users should download the Office Editing for Docs, Sheets, & Slides plug-in.

# 12.7. Index contains an invalid wildcard character

When using any option with the **Indexes Above** phrase, **\*** can not be used in any index field. The following error will occur if **\*** is found in an index.

Image Inquiry 《
Index Search Venu •
Z-COURT DOCUMENTS AND EXHIBIT
698745
FILE DATE
*
DEFENDANT
CASE TYPE
COURT/JUDGE
DOCUMENT TYPE
From Date 🖸 To Date 🔹
An index contains an invalid wildcard character
🔍 Search 🛛 🚱 Functions 🗸 🖉 Clear

# 13. FAQ

# **13.1. How To Instructions**

This section provides How To instructions for completing common tasks needed for One Look installation and setup.

# 13.1.1. Install the RVI PC Viewer

- 1. Download the latest RVI PC Viewer from <u>Real Vision Software</u>, Support, Support Resources, Login *rvi4579*, Version 9.0.
- 2. Select RVI PC Installation Version 9.x.
- 3. Extract the .zip file to the PC hard drive.
- 4. Open **RVI9x** setup folder.
- 5. Right mouse click RVI PC Imaging 9.x Installer.exe.
  - a. Select 'Run As Administrator' (if available).
- 6. Take the defaults throughout the installation.

# 13.1.1.1. Navigate the RVI PC Viewer

#### Starting the Real Vision Imaging System PC Viewer

To start the Real Vision Imaging System with One Look, first open the One Look browser session, then open the RVI PC Viewer. The Real Vision Imaging System PC Viewer will try to automatically connect to One Look. The RVI PC Viewer will show 'Not Connected' in the bottom right corner even though it is communicating with the browser. The 'Not Connected' is associated emulation interfaces which we are not concerned with for the One Look browser interface.

	mage System 9 -	_	□ ×
lmage	View Scan Print Page Host		
5 İ	· ↔ ♥ ♥ 🗄 🖉 🕐 🗩 + ዞ ◀ ▶ ዞ 🚟 🚭 🧮 💹 № 🗚	1 🔨	
	🗷 🔿 🔅 🔲 🕇 🕇 🔪 🔺 🔺 Approved		
	LOUISTANA UNITODIA ADUSE DELIGNATION ODDED		
	LOUISIANA UNIFORM ABUSE PREVENTION ORDER COURT NAME AND PARISH/CITY: PUBLICAL DIVISION: DOCKET NO:		
	9* JUDICIAL DIVISION: DOCKET NO.: RAPDES/ALEXANDRIA FILED: CLERK:		
	JUDGEMENT OF DISMISSAL		
·	PETITIONER'S NAME:         CINDY         L.         STEVENS           First         Maiden/Middle         Last           Date of Birth         07/15/80         Sex:         F         Rate:         C		
	On behalf of (name, date of birth, and relationship to petitioner):		
	SARAH STEVENS, 08/09/99, DAUCHTER		
	Υ.		
	DEFENDANT'S NAME: PHILLIP O. STEVENS		
	First Maiden/Hiddle Last		
	Date of Birth 01/25/78 Sex: M Race: C Address: 111 Sam Hill Rd, Alexandrin, LA 71301		
	Social Security # 000-00-0000 Dr. Lic. # 123456789 State: LA Exp. 8/20/13		
	IT IS HEREBY ODERED, ADJUDGED, and DECREED that the Petition for Protection from Abuse filed on theday ofbe the same is hereby dismissed. WITHOUT PREJUDICE: On petitioner's failure to appear and proceed(provide reason) WITH PREJUDICE: On petitioner's failure to prove by the appropriate standard the ellegations contained in the x Petition for Protection From Abuse(provide reason)		
	Date of Order \$/7/2012		
	Moldaylyr.		
	Cepies to: 1) Court file 2) Petitioner 3) Defendant 4) Law Enforcement agency designated for service 5) Louipiana Protective Order Registry PAXED MAILED TO LA, PROTECTIVE ORDER REGISTRY DATE: CLERK:		
	12321654 (Document 1 Page 1 of 1)		
Ready	Document 1 of 1 C:\RVI\CACHE\QAAAAFUK.001	Connec	ted: A

For detailed information on the RVI PC Viewer features, reference Chapter 1 in the RVI 90 IBMi User Manual .

# **13.1.2. Determine if the RVI Webserver**

# Running on the IBM i

To determine if the RVI webserver is already running, use the command below. Scroll through the list of webservers to find the RVIWEB server.

#### wrkactjob sbs(qhttpsvr)

The name of the RVI webserver is left to the customer's discretion. RVI recommends naming the webserver RVIWEB.

# 13.1.3. Setup Internet Users and System Access

Each user logging into One Look must have a valid internet user id and password.

### Setting up Internet Users using the IBM i Client

From an IBM i command line, type GO IMAGE

**RVILIB** must be in your library list. To add RVILIB to your library list, type **ADDLIBLE RVILIB** from an IBM i command line.

#### Option 1: Allow Access to ALL unsecured systems:

- 1. Select 11: Security/Internet Menu
- 2. Select 7: Maintain Internet User Profiles
- 3. F9 = Add User

If the user id already exists in the table, there is nothing further you need to do.

- 4. Specify an Internet User Id, Password, unsecured System ID
- 5. Press < Enter >

#### **Option 2: Allow Access to specific secured systems:**

- 1. Select 11: Security/Internet Menu
- 2. Select 7: Maintain Internet User Profiles
- F9 = Add User
   If the user id already exists in the table, continue with Step 6.
- 4. Specify an Internet User Id, Password, secured System ID
- 5. Press < Enter >
- 6. F3 = Exit
- 7. Select 1: Maintain Image Security By User
- 8. Scroll to the bottom of the table
- 9. Under the User ID column, specify the internet user id Under System ID Code column, specify the secure system id
- 10. Press < Enter >

Steps 1 – 10 must be repeated for EVERY secured system id the user will need to access.

#### **Option 3: Allow Access to specific secured and unsecured systems:**

- 1. Select 10: Maintain Internet User Access
- 2. F9 = Add User
- 3. Specify an Internet User ID and System ID
- 4. Press < Enter > until you return to the Internet Profile Maintenance Screen
- 5. F3 = Exit

Steps 1 – 5 must be repeated for EVERY system id (secured and unsecured) the user will need to access.

#### For all secured systems specified in Step 3, continue to Step 6.

- 6. Select 1: Maintain Image Security By User
- 7. Scroll to the bottom of the table
- Under User ID column, type the internet user id Under System ID Code column, specify the secured system id

Steps 6 – 8 must be repeated for EVERY secured system id the user will need to access.

# 13.1.4. Setup the RVIWEB Instance on the IBM i Server

- 1. Open an IBM i session.
- 2. Navigate to a command line.
- 3. Add RVILIB to your library list (ADDLIBLE RVILIB).
- 4. Type CALL RVAWCNF

The following screen will display.

Create/Remove Apache Instance	(c)	Copyright	RVI	1992,	1999,	2003
				RVAW	CNFFM/	SCRN1
Instance Name RVIWEB	_					
Port	_					
Library RVILIB	_					
Additional Directory 1:						
Additional Directory 2:						
Additional Directory 3:						
Additional Directory 4:						
Additional Directory 5:						
Start Server? Y/N: <u>Y</u> Only i						
F5 = Create Instance F7 = Remove Instar	ice	F9 = C	reat	e Secu	re Ins	tance
Entries will be made for IMAGE and OPTICAL	IFS	directorie	s an	d QDLS	folde	rs.
Additional Directories are any IMAGE-like of	lirec	tories for	whi	ch DIR	ECTORY	and
ALIASMATCH blocks are to be created in this						
trailing slashes in the Additional Director					_	
folder named IMAGE2 would be entered as QDL	-			_		
F3 =Exit						

- 5. Specify an 'Instance Name' for your web server or leave the default of RVIWEB.
- 6. Specify a port number for your web server or leave the default of 8085.
- 7. Press F5 to create and start the server instance or F9 to create and start a secure instance.

Entries for QDLS, IMAGE, and OPTICAL will be generated automatically. If you have other directories used by RVI such as alternate "image" directories, specify the directory name(s) next to 'Additional Directory'.

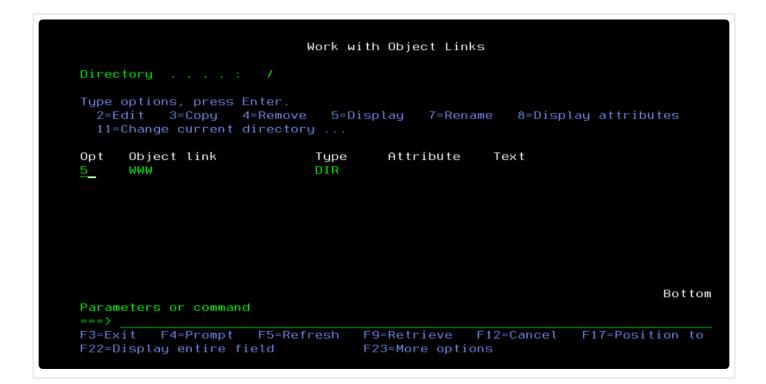
### 13.1.4.1. Identify RVI Webserver IP Address and Port Number

### **Identify RVI Webserver Port Number**

1. From an IBM i command line, type WRKLNK 'WWW'

	REAL VISION IMAGE MENU Ver. 9.0	
<ol> <li>Image Inquiry.</li> <li>Scanning Menu.</li> <li>Spool File Menu.</li> <li>Color Menu.</li> <li>Fax/E-Mail Menu.</li> </ol>	8. Maintenance Menu. 9. Document Tab Menu.	<ol> <li>Security/Internet Menu.</li> <li>Screen Scrape Menu.</li> <li>Import External Documents.</li> <li>System Operator Menu.</li> <li>Customer Specific Menu.</li> </ol>
F3 =Exit Selection or comman ===> <u>WRKLNK 'WWW'</u>		90 =Signoff
	t F9=Retrieve F12=Cancel sistant F16=System main menu A	20/007

2. Put a **5** next to the **WWW** directory.



Put a 5 next to name of the RVI webserver instance.
 In this example, the default name RVIWEB is used.

Dire	otoru	7 616161	
DITE	ctory :	7 WWW	
Tupe	options, press Ent	er.	
			splay 7=Rename 8=Display attributes
11:	=Change current dir		
<b>•</b> •		· · · · ·	
Opt	Object link	Type	Attribute Text
	PCWEB	DIR	
	RICHTEST	DIR	
	RICHWEBS	DIR	
	RVIECS	DIR	
	RVISECURE	DIR	
	RVISSL1	DIR	
5	RVIWEB	DIR	
	RVIWEBRC	DIR	
	RVIWEBSSL	DIR	
			More.
Para	meters or command		
===>			

4. Put a **5** next to **conf** directory.

	Work with Obj	ect Links		
Directory : /www/	/RVIWEB			
Type options, press Enter. 2=Edit 3=Copy 4=Remove 11=Change current director	• =	7=Rename	8=Display	) attributes
Opt Object link	Type Att	ribute T	ext	
5 conf	DIR			
htdocs	DIR			
logs	DIR			
Parameters or command				Bottom
===>				—
F3=Exit F4=Prompt F5=Re	fresh F9=Ret	rieve F12	=Cancel F	17=Position to
F22=Display entire field	F23=Mo	re options		

5. Put a **5** next to **httpd.conf**.

		Work wi	th Object Lin	ks	
Direc	:tory : /	WWW/RVIWEB/	conf		
2=E	options, press Ente dit 3=Copy 4=Re Change current dire	move 5=Di	splay 7=Ren	ame 8=Disp	lay attributes
0pt 5_	Object link httpd.conf	Type STMF	Attribute	Text	
===>	neters or command				Bottor
F3=Ex F22=D	it F4=Prompt F5 Display entire field		F9=Retrieve F23=More opti		F17=Position to

6. Look for **Listen** to find the port number.

Browse : /www	/RVIWEB/con	f/httpd.conf		
Record : Control :	<u>1</u> of	99 by <u>14</u>	Column : <u>1</u>	59 by <u>79</u>
		3+4 data**************	+5+6 **	+7+
<pre><location *=""></location></pre>				
<limitexcep< td=""><td>t GET HEAD</td><td>OPTIONS TRACE POS</td><td>T&gt;</td><td></td></limitexcep<>	t GET HEAD	OPTIONS TRACE POS	T>	
Order de	ny,allow			
Deny fro	mall			
<td>pt&gt;</td> <td></td> <td></td> <td></td>	pt>			
Listen 8085				
CGIConvMode %%	MIXED/MIXED	%%		

#### **Identify RVI Webserver IP Address**

- 1. From an IBM i command line, type **GO TCPADM**.
- 2. Select Option 1 Configure TCP/IP.
- 3. Select Option 10 Work with TCP/IP Host Table Entries.
- 4. Scroll through the list of entries to find the IP address for the host.

# 13.1.5. Configure IBMi Email Server

For instructions and information on IBMi Email Server setup, reference the <u>RVI 90 IBMi User Manual</u>, Chapter 17.

# 13.1.6. Setup RVIINET Download

- 1. The <u>RVIWEB</u> instance on the server must already be setup and running.
- The directory /CGIBIN must exist on the server. If it does not, create it using the command CRTDIR 'CGIBIN'.
- 3. Go to www.realvisionsoftware.com, Support, Login *rvi4579*, RVI Version 8.0, select RVIINET30079.zip, download the file.
- 4. Unzip the contents of RVIINET30079.zip into /CGIBIN.
- 5. Setup LPKFLAG control file parameter.
  - a. On an IBM i command line, type GO IMAGE (You must have RVILIB in your library list.)
  - b. Option 8 Maintenance Menu
  - c. Option 7 Maintain System Control File Parameters
  - d. Set control file parameter LPKFLAG to 3,0,0,79

ystem Control File Maintenance Screen	(c)Copyright RVI 1992, 1999
	SYS005FM/FORMAT
Control File Record: LPKFLAG	
Description: 3,0,0,79	

When viewing documents in One Look using RVIINET, the browser compares the RVIINet.CAB Version (version=3,0,0,79) indicated in the control file parm LPKFLAG with the installed version on the PC. If updates are required for the web viewer, an updated RVIINet installation is automatically downloaded and installed on the PC.

In order to ensure all clients are updated with the latest version from a single source, the updated RVIINET.LPK and RVIINET.CAB files must exist in the CGIBIN directory of the referenced internet server and the LPKFLAG set to the current version. The Host System Manager is responsible for downloading and updating the latest version from the Real Vision Software web site.

# **13.1.7. Create Action Codes**

1. From an IBM i command line, type GO IMAGE

**RVILIB** must be in your library list. To add RVILIB to your library list, type **ADDLIBLE RVILIB** from an IBM i command line.

2. Select 6: Image Management Menu

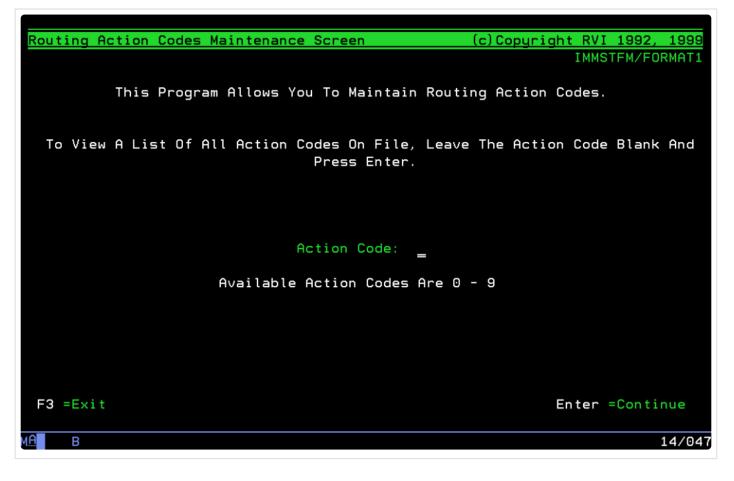
		<u>REAI</u>	<u>VISION IMAGE MENU</u> Ver. 8.0		
1.	Image Inquiry.	6.	Image Management Menu.	11.	Security/Internet Menu.
2.	Scanning Menu.	7.	Optical Menu.	12.	Screen Scrape Menu.
З.	Spool File Menu.	8.	Maintenance Menu.	13.	Import External Documents.
4.	Color Menu.	9.	Document Tab Menu.	14.	System Operator Menu.
5.	Fax/E-Mail Menu.	10.	OCR Menu.	15.	Customer Specific Menu.
	F3 =Exit election or comman ==> <u>6</u>		Help Available		90 =Signoff
			9=Retrieve F12=Cancel nt F16=System main menu		

3. Select 5: Rubber Stamp Action Codes

#### REAL VISION IMAGE MANAGEMENT MENU

<u>Image Management Inquiry</u>	<u>Image Management Reports</u>
1. Routed By User ID	<ol> <li>Images Routed By User ID</li> </ol>
<ol><li>Routed By Routing Profile</li></ol>	12. Images Routed By Routing Profile
3. Notepad By User ID W/Open Notes	13. Routing Profile Members
	14. Rubber Stamp Action Codes
<u>Image Management Maintenance</u>	15. Routing Rules
<ol><li>Image Routing Profiles</li></ol>	16. Routing Approval Rules
5. Rubber Stamp Action Codes	17. Routing Destinations
6. Routing Rules	18. Overdue Notifications
<ol><li>Routing Approval Rules</li></ol>	19. Workbasket Access
8. Routing Destinations	<u>Image Management Aging</u>
9. Overdue Notifications	20. Send Overdue Notifications
10. Workbasket Access	21. Start Notifications Polling
	22. End Notifications Polling
Selection or Command	90 =Signoff
===> <u>5</u>	
F3=Exit F4=Prompt F9=Retrieve F12=	Cancel
F13=Information Assistant F16=System ma	ain menu

4. Specify the desired number (0-9) for the new action code.To see a list of existing action codes, press < Enter >



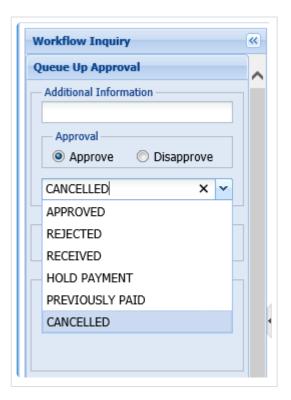
Specify the Description of the action code.
 The Description is the value seen in the Que Up Approval action codes drop down list.



The new action code will be added to the IBM i table.

<u>Routing Action Code</u>	es Selection Screen	(c)Ca	<u>opyright RVI 1992, 1999</u>
	-		IMMSTFM/CATLSTCT
Type Option, Press			
X=Select D=Dele	te		
		Addl Information	1
<u>Opt</u> <u>Action Code</u>		<u>Required? Y/N</u>	
- 0	APPROVED	Y	
_ 1	REJECTED	N	
_ 2 3	RECEIVED HOLD PAYMENT	Y	
3 4	PREVIOUSLY PAID	r N	
- <sup>4</sup> 5	CANCELLED	N	
_ 5	CHNCELLED	N	
Page Up =Previous	Page		Page Down =Next Page
F3 =Exit	F12 =Cano	cel	Enter =Continue
мА В			08/004

The action codes drop down list in the Que Up Approval window will update to reflect the new code.



# 13.1.8. CALL MVC013 or MVC013D

#### MVC013: Scan to PC

The parameters are described below.

Length	Туре	Description
211	Char	The 1-byte System ID concatenated with the seven, 30 byte indexes
2	Char	Return Code
		If blanks are passed in, a black and white scan will result
		If CL is passed in, a color scan will result
		If RT is passed in, the user will be prompted for a Routing Profile after the
		scan
		If the user accepts the resulting scan, OK will be returned in this parameter
2760	Char	Optional Parm – Pass as an Array that is 30 x 92 for indexes 8 through 99
		Place values in array elements corresponding to the index value. For example
		the value for index 8 is in the first 30 byte element and index 99 is in element
		<ol><li>If you are not using additional indexes then do not pass this parameter.</li></ol>

If Index 1 of the 211 byte parameter contains:	Function:
?	Will set Index 1 of the resulting scan to be <b>SNNNNNN</b> , where <b>S</b> is the Image System ID Code and <b>NNNNNN</b> is the Transaction Number

If Index 7 of the 211 byte parameter contains:	Function:
?	Prior to scanning, prompts the user for a document type from a list of all document types on file
? and 2 char Document Tab Profile	Prior to scanning, prompts the user for a document type from a list of all document types contained in that Document Tab Profile
? and 2 char Group Tab Profile and *	Prior to scanning, prompts the user for a document type from a list of all document types contained in that Group Tab Profile

For multi-page batch or multi-page barcode scans, Index 7 can also be optionally structured as follows: Positions 1-4, #999, where 999 is the number of pages per image.

Positions 5-12, Routing profile

Positions 13-20, Barcode profile

Positions 21-30, Document type

#### MVC013D: Scan Direct

This program will initiate a scan. This scan program cannot be used for documents that require a batch scanning and bursting process. The parameters are described below.

Length	Туре	Description
211	Char	The 1-byte System ID concatenated with the seven, 30 byte indexes
2	Char	Return Code.
		If blanks are passed in, a black and white scan will result
		If CL is passed in, a color scan will result
		If RT is passed in, the user will be prompted for a Routing Profile after the
		scan
		If the user accepts the resulting scan, OK will be returned in this parameter
30	Char	Parameter for manual entry of document type. Used if * is passed in index 7
3	Char	Not used. Pass as blanks
8	Char	Not Used. Pass as blanks
2760	Char	Optional Parm – Pass as an Array that is 30 x 92 for indexes 8 through 99
		Place values in array elements corresponding to the index value. For example
		the value for Index 8 is in the first 30 byte element and index 99 is in element
		<ol><li>If you are not using additional indexes then do not pass this parameter.</li></ol>

If Index 1 of the 211 byte parameter contains:	Function:
?	Will set Index 1 of the resulting scan to be <b>SNNNNNN</b> , where <b>S</b> is the Image System ID Code and <b>NNNNNN</b> is the Transaction Number
If Index 7 of the 211 byte parameter contains:	Function:
?	Prior to scanning, prompts the user for a document type from a list of all document types on file
? and 2 char Document Tab Profile	Prior to scanning, prompts the user for a document type from a list of all document types contained in that Document Tab Profile.
? and 2 char Group Tab Profile and *	Prior to scanning, prompts the user for a document type from a list of all document types contained in that Group Tab Profile

### **13.1.9. Enroll Users in System Distribution Directory**

To add a user to the directory:

- Type GO MAIN on the IBM i command line
- Option 11 IBM i Access tasks
- Option 21 Enroll IBM i Access users

MAIN OS/400 Main Menu Select one of the following:
<ol> <li>User tasks</li> <li>Office tasks</li> <li>General system tasks</li> <li>Files, libraries, and folders</li> <li>Programming</li> <li>Communications</li> <li>Define or change the system</li> <li>Problem handling</li> <li>Display a menu</li> <li>Information Assistant options</li> <li>iSeries Access tasks</li> </ol>
90. Sign off Selection or command ===>
PCSTSK iSeries Access Tasks
Select one of the following:
User Tasks 1. Copy PC document to database 2. Copy database to PC document 3. Work with documents in folders 4. Work with folders 5. iSeries Access Organizer
Administrator Tasks 20. Work with iSeries Access administrators 21. Enroll iSeries Access users 22. Configure PC connections 23. Work with line description query status 24. Start servers for iSeries Access clients
Selection or command ===>

You will then see the following screen:

Enroll iSeries Acce	ss Users
Type choices, press Enter.	
User profile User identifier:	Name
User ID	Character value
Address <u>BLANK</u>	Character value
User description	
Add to system directory <u>*yes</u>	*NO, *YES

Enter the user's IBM i profile/user id. Normally these are one in the same. You have the option of entering a user description. Make sure 'Add to system directory' is set to \*YES. When you press enter, a message will appear at the bottom of the screen stating the user has been enrolled.

# 13.1.10. Setup Option Security

Setup for Option Security is done from the IBM i green screen. Refer to Chapter 9 (Option 3 ) in the <u>RVI 90</u> <u>IBMi User Manual</u> for details.

The following options are available in One Look Image Inquiry and WorkBasket: (By default users have access to all options.)

(	Workbasket Menu
)	Maintenance Menu
+	Batch Indexing
*	View Unredacted
&	Additional Index Filter
!	Download
-	Change Password
@	Temporary Grid
?	See Routing
=	Import
А	Audit Inquiry
В	View Previous Version

D	Delete from Routing Queue
С	Call Back Reminders
Е	Email Image
F	Fax Image
Н	Workbasket Approval History
K	Approve/Disapprove
Μ	Workbasket Move
Ν	Add Notes
R	Routing Profile
S	Scan Documents
U	Route User
Х	Image Information
Ζ	Custom Options
d	Allow Deletion in Index Maint
s	Staple Documents
u	Upload Documents
w	Move to Sub Workbasket
х	Index Maintenance
1	Add Redactions

# 13.1.11. Setup Image Markup Preferences

From within the RVI PC Viewer, with an image displayed, select View, Display Properties.

mage Settings Annotation	<u></u> K	
Set the default color of	options for Highlights and Annotations	Cancel
Highlight Color:	Light Yellow	
Note Color:	Yellow	
Text Color:	Black 🗨	
Line Color:	Light Red 💌	
Line Width:	8	
Auto Arrow Length:	200 pixels 🗨	
Auto Arrow Rotation:	45 degrees 💌	

# 13.1.12. Setup A Scan Profile

Setup for Scan Profiles is done from the IBM i green screen. Refer to Chapter 4 (Option 16 ) in the <u>RVI 90</u> <u>IBMi User Manual</u> for details.

### 13.1.13. Setup Stapling

Setup for Stapling is done from the IBM i green screen. Refer to Chapter 18 (Imaging/Stapling) in the <u>RVI 90</u> <u>IBMi User Manual</u> for details.

# 13.1.14. Setup Originator Email Addresses

When the One Look user id matches the user id setup in the Originator Email Address table on the IBMi, the One Look sender email address will automatically populate with specified email address.

1. At an IBMi command line, with RVILIB in your library list, type GO IMAGE

- 2. Option 5 Fax/E-Mail Menu
- 3. Option 9 Maintain Originator Email Addresses
- 4. F6 = Add A Record

RVI Originator	Email Address M	aintenance	(c) Copyright 2003, RVI
Skip To User ID	):		
0 User ID Us	ser Name	Email Address	
			More
Opt: 1=Select F3=Exit	2=Modify	4=Delete F6=Add Record	F12=Cancel
M <u>A</u> D			

5. Supply User ID (One Look User ID), Name, and Email Address

RVI Originato	or Email Address Maintenance (c) Copyright 2003,
User ID	SCANNER
Name	SCANNER WORKSTATION
E-Mail Addr.	SCANNER@REALVISIONSOFTWARE.COM

### 13.1.15. Setup RVI Socket Server (DataQue)

For DataQue configuration options  $\underline{E}$  and  $\underline{F}$ , users must provide valid login credentials via the RVI Socket Server interace.

The RVI Socket Server interface is automatically installed with the RVI PC Viewer. It is accessible through

the Windows system tray. Right click the RVI Socket Server icon **used** and select Settings.

If you do not see the RVI Socket Server icon in the system tray, manually start the socket server from C:\Program Files (x86)\Real Vision Software, Inc\RVI Sockets\RVISockets.exe

Under the iSeries section:

- Enable 'Connect to IBM i'
- Set your RVI library. (The default RVI library is RVILIB)
- Select one of the following:
  - IBM i User
  - · IBM i Common User With Defined User
  - IBM i Common User With PC User

RVI Socket Server X				
TWAIN Device				
TWAIN Devices				
HP OfficeJet 3830 series TWAIN $\sim$				
Screen Scrape				
Enable Screen Scrape				
Ctrl Shift F5 Enabled				
iSeries DataQueue Users				
Connect to IBM i				
Library RVILIB				
IBM i User				
Address				
User				
Password				
O IBM i Common User With Defined User				
HTTP Address				
User				
IBM i Common User With PC User (AD)				
HTTP Address				
Data Queue Connected				
ОК				

#### IBM i User:

- Address: IBM i IP address
- User: IBM i user id
- Password: IBM i password

# **IBM i Common User With Defined User:** (*Requires IBM i control parameters. Contact* <u>*RVI support*</u> for setup.)

• HTTP Address: HTTP address pointing to the <u>RVI web server</u> instance.

**IBM i Common User With PC User:** For Active Directory users. (*Requires IBM i control parameters. Contact* <u>*RVI support*</u> for setup.)

• HTTP Address: HTTP address pointing to the <u>RVI web server</u> instance.

### 13.1.16. Setup RVI Socket Server (Twain)

For Twain scanning, a default twain device must be set via the RVI Socket Server interace.

The RVI Socket Server interface is automatically installed with the <u>RVI PC Viewer</u>. It is accessible through

the Windows system tray. Right click the RVI Socket Server icon and select Settings.

If you do not see the RVI Socket Server icon in the system tray, manually start the socket server from C:\Program Files (x86)\Real Vision Software, Inc\RVI Sockets\RVISockets.exe

RVI Socket Server X		
TWAIN Device		
TWAIN Devices		
HP OfficeJet 3830 series TWAIN $\sim$		
Screen Scrape		
Enable Screen Scrape		
Ctrl Shift F5 Enabled		
iSeries DataQueue Users		
Connect to IBM i		
Library RVILIB		
IBM i User		
Address		
User		
Password		
O IBM i Common User With Defined User		
HTTP Address		
User		
O IBM i Common User With PC User (AD)		
HTTP Address		
Data Queue Connected		
ОК		

**TWAIN Device:** The list of available TWAIN Devices is determined by the twain driver(s) installed on the pc.

### 13.1.17. Setup SSL Configuration for IBMi

There are 2 SSL configuration options:

- 1. HTTP SSL
- 2. WSS SSL

# 13.2. RVIOneLook.exe

To watch a video on this topic CLICK HERE

RVIOneLook.exe is used for custom interfaces using HLLAPI or DataQ connection.

For additional information on the installation and setup of RVIOneLook.exe, view our RVIOneLook.exe video.

Download <u>RVIOneLook.exe</u> here.

# **14. HELP**

# **14.1. Contact Real Vision Software**

Phone: 318-449-4579 Email: support@realvisionsoftware.com Website: www.realvisionsoftware.com