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 **Real Vision Software** to schedule your One Look installation.

2. INTERFACES

Please contact Real Vision Software 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 **RVI Support** for installation.

Setup and Testing:

1. Create an **internet login** for each user.
2. 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 RVI PC Viewer
- One Look displaying images as TIF in RVIINET (IE ONLY)
- 5250 emulation calling One Look displaying images as PDF in the browser (See 5250 Configuration Options for details.)

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

- One Look calling the RVI PC Viewer

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
  _ F=FTP            _ U=UNC                _ 2=UNC-SYSTEMX Value
  _ H=HTTP           _ T=TCP-UNC            _ 3=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 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
 _ 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
```

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.*

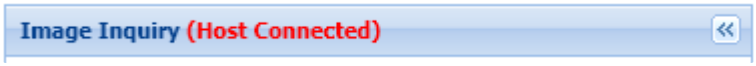
Requirements:

1. Active 5250 session

2. RVI PC Viewer shows ‘Connected: A’.

   Connected: A

3. One Look browser shows ‘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

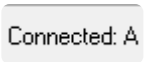
Uses Green Screen, Index List in OneLook, and views go to One Look.

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

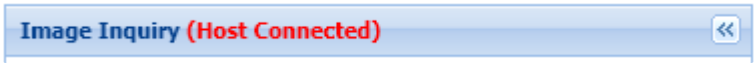
Requirements:

1. Active 5250 session

2. RVI PC Viewer shows ‘Connected: A’.

3. One Look browser shows ‘Host Connected’.



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 RVI Socket Server credentials

3. 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.

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

Requirements:

1. Active 5250 session

2. Set RVI Socket Server credentials

3. RVI PC Viewer shows 'Socket' in the bottom right hand corner.

   Socket

4. 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 RVI One Look executable on the user's pc.

For setup instructions, view the RVIOneLook.exe video.

> ! RVIOneLook.exe will run an internal socket (*as opposed to the System Tray Socket*). If installed, the System Tray Socket must not be running.

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

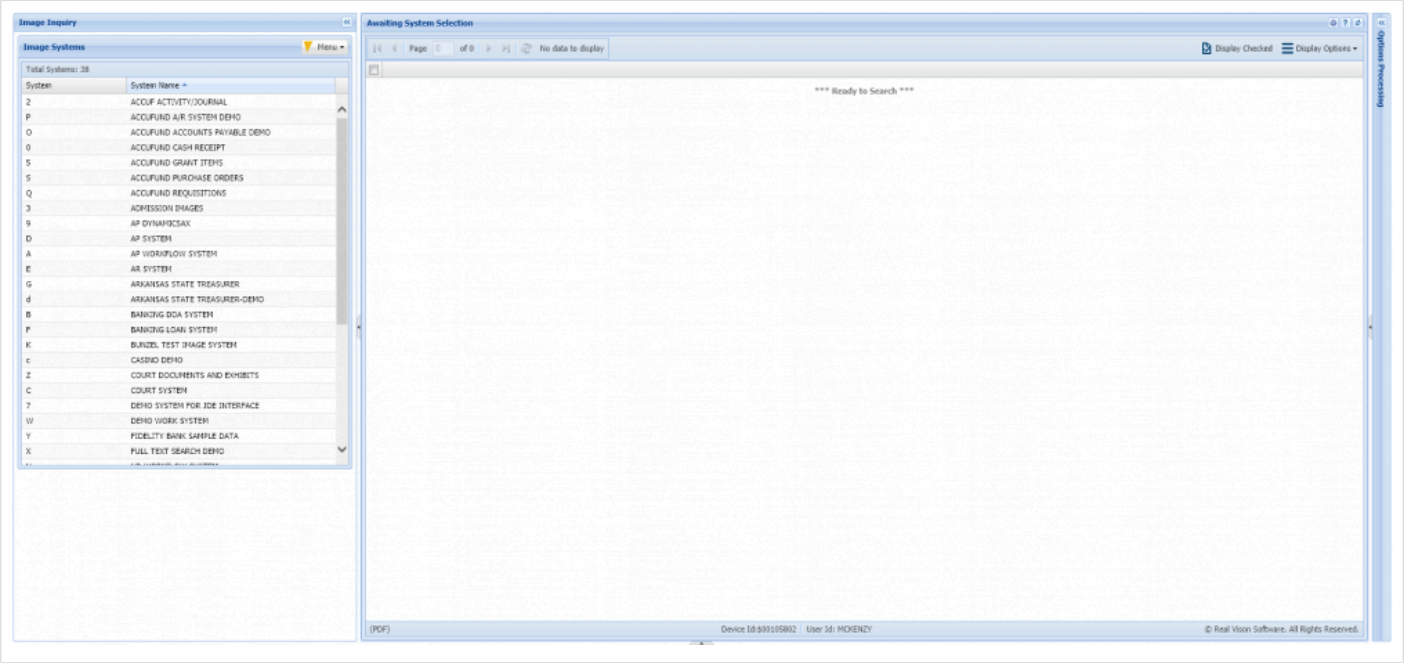
1. Open your internet browser.

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.

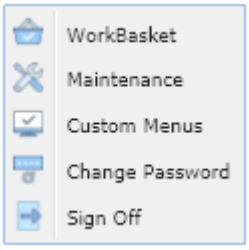
The list of available RVI system codes will appear based on the user security set on the IBM i server. Results can be sorted in ascending or descending order by clicking the System or System Name heading.



! 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 WorkBasket, Maintenance, Custom Menus, Change Password, and Sign Off.



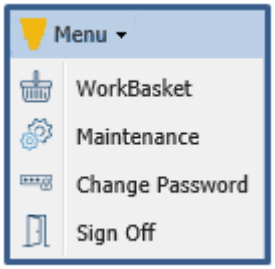
6.1. WorkBasket

To watch a video on this topic CLICK HERE

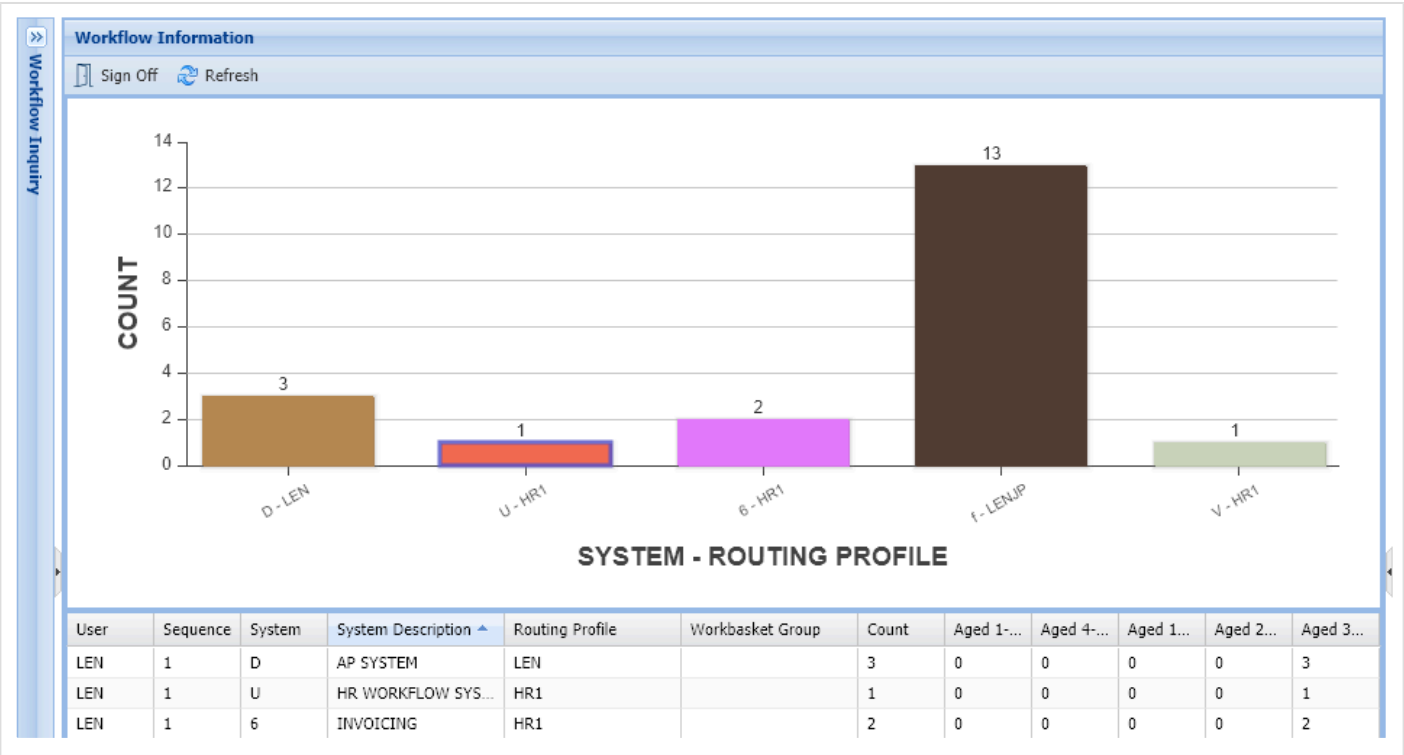
> All workbasket and routing setup must be done through the IBM i green screen interface. RVI is currently updating the One Look Maintenance tab to handle these tasks in the future. For instructions and information on document workflow setup, reference the RVI 90 IBMi User Manual, Chapter 6.

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.)

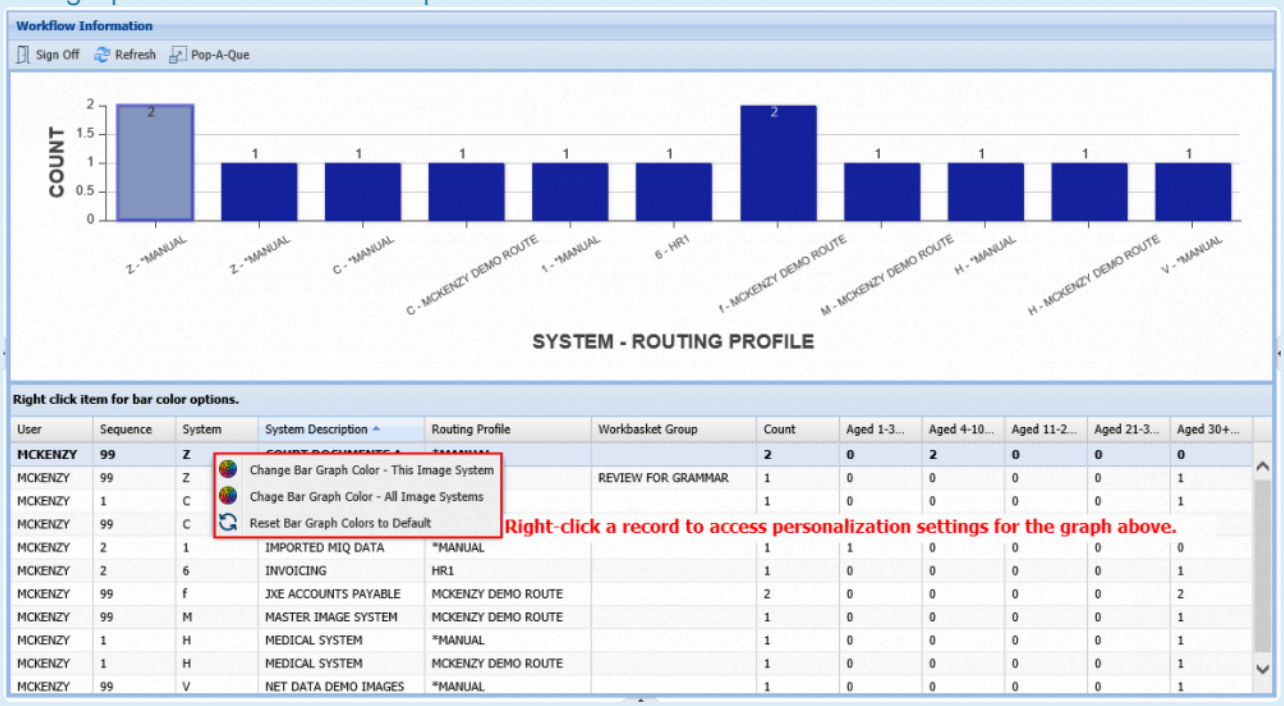


The user is automatically taken to Workflow Inquiry/Workflow Information where they will see a graphical representation of routing profile counts and a list of workbasket items.



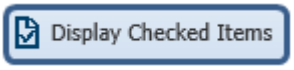
User	Sequence	System	System Description	Routing Profile	Workbasket Group	Count	Aged 1-...	Aged 4-...	Aged 1...	Aged 2...	Aged 3...
LEN	1	D	AP SYSTEM	LEN		3	0	0	0	0	3
LEN	1	U	HR WORKFLOW SYS...	HR1		1	0	0	0	0	1
LEN	1	6	INVOICING	HR1		2	0	0	0	0	2

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

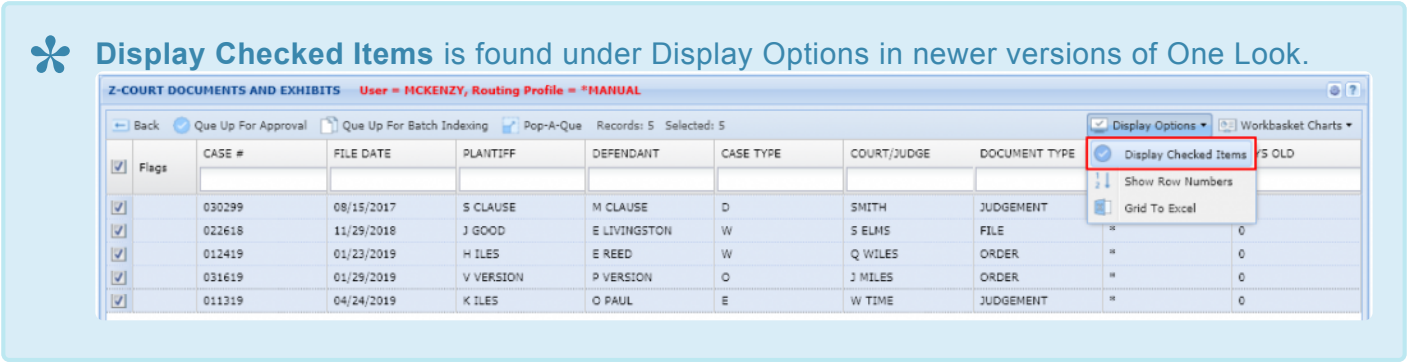


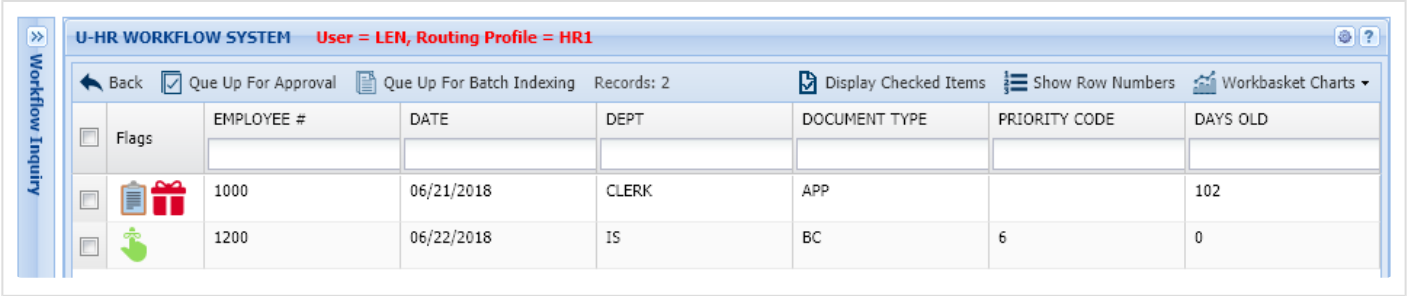
User	Sequence	System	System Description	Routing Profile	Workbasket Group	Count	Aged 1-3...	Aged 4-10...	Aged 11-2...	Aged 21-3...	Aged 30+...
MCKENZY	99	Z				2	0	2	0	0	0
MCKENZY	99	Z			REVIEW FOR GRAMMAR	1	0	0	0	0	1
MCKENZY	1	C				1	0	0	0	0	1
MCKENZY	99	C									
MCKENZY	2	1	IMPORTED MIQ DATA	*MANUAL		1	1	0	0	0	0
MCKENZY	2	6	INVOICING	HR1		1	0	0	0	0	1
MCKENZY	99	f	JXE ACCOUNTS PAYABLE	MCKENZY DEMO ROUTE		2	0	0	0	0	2
MCKENZY	99	M	MASTER IMAGE SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	*MANUAL		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	99	V	NET DATA DEMO IMAGES	*MANUAL		1	0	0	0	0	1

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

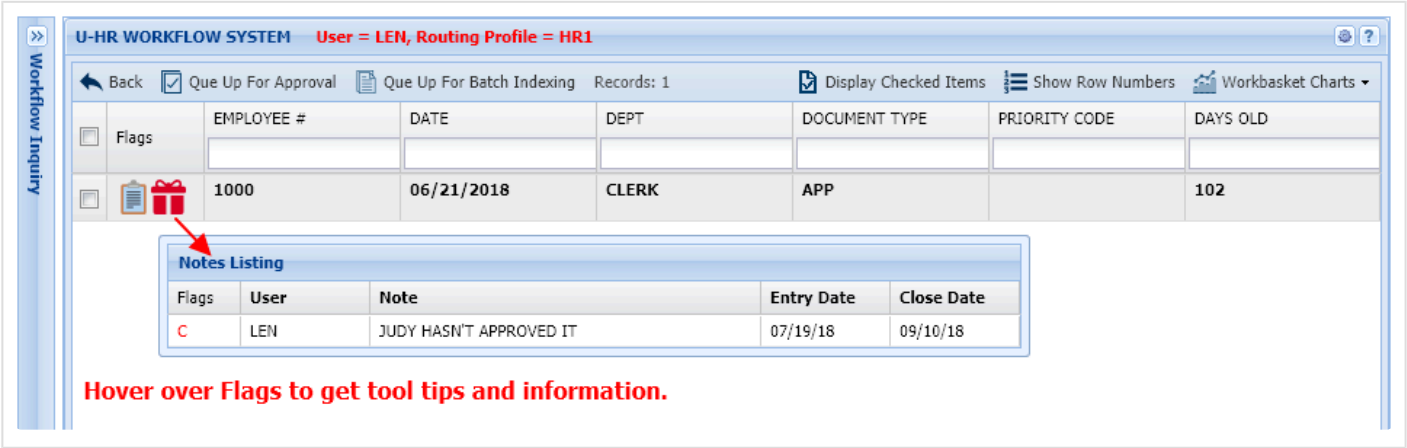
3. Work with the documents that have been routed to the workbasket by double-clicking a record or enable the checkbox under the Flags column to select multiple record(s) then click 

.

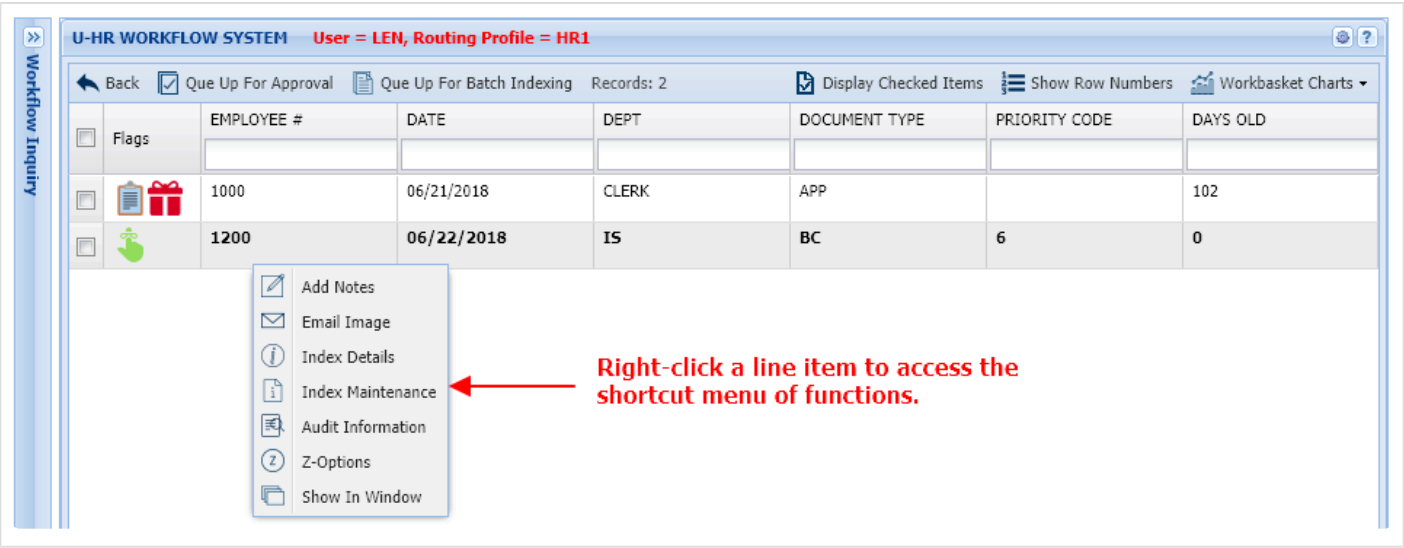




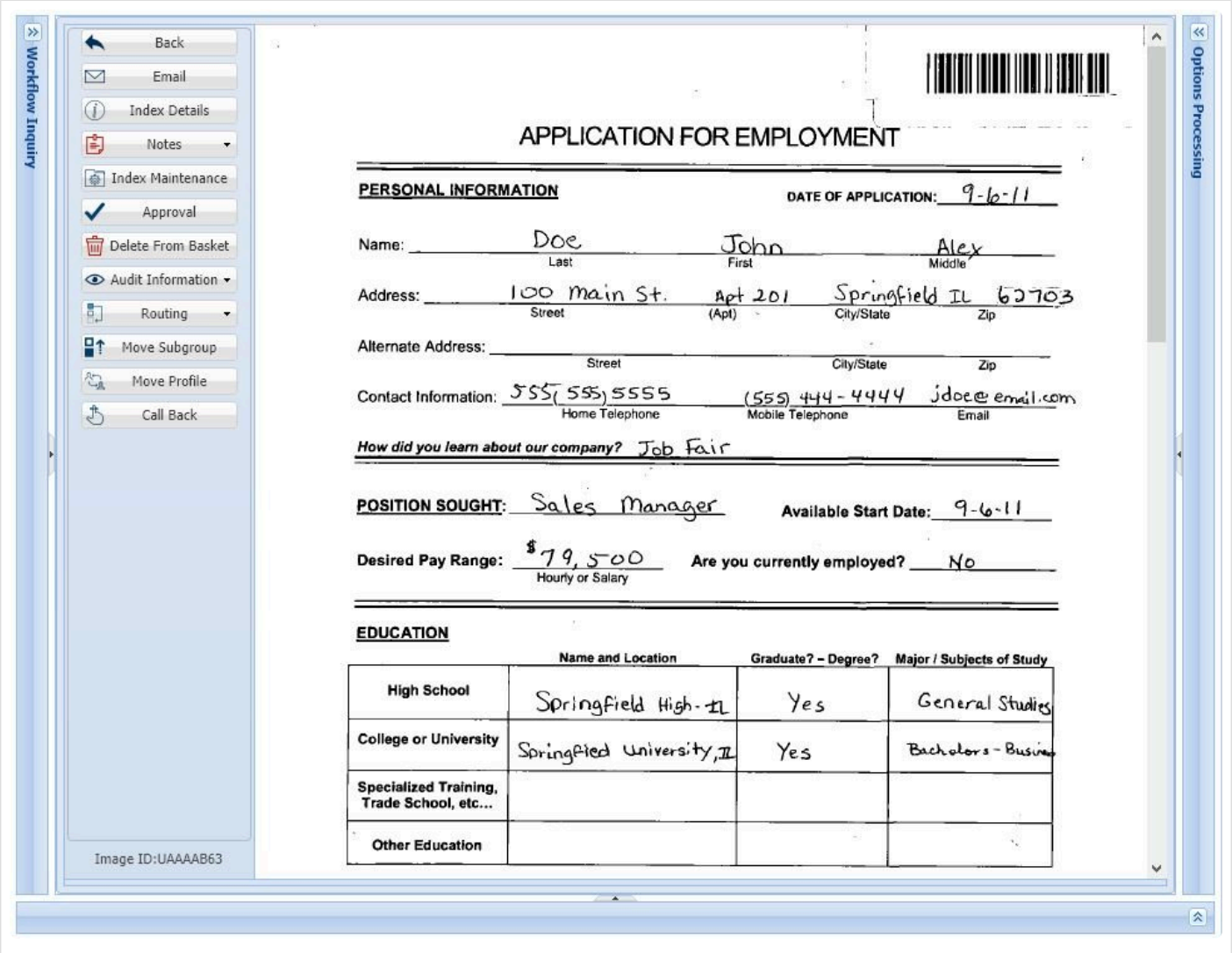
Hover over corresponding Flags to get tooltips and details including Notes, Packages, Call Back Reminders.



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



Users have the option to approve and index directly from the display window using the Approval and Batch Indexing buttons or they can return to the system's workbasket entries using the Back button which provides options for Que Up For Approval and Que Up For Batch Indexing .



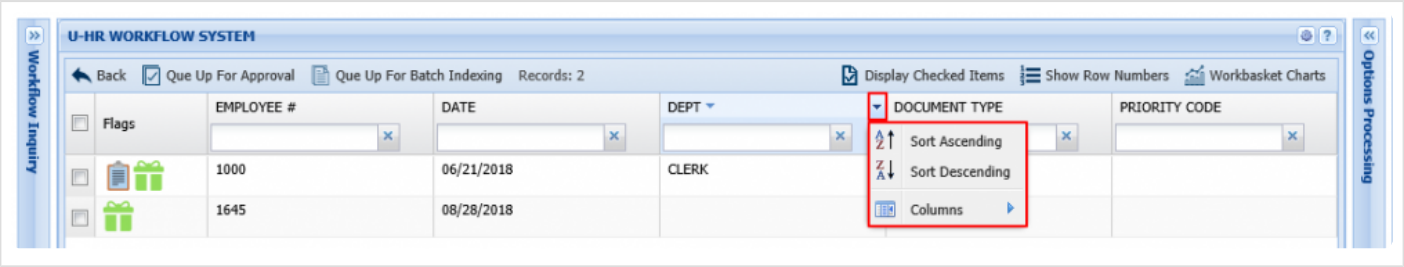
When accessing the Workflow Inquiry screen, users will have access to functions and symbols to help them navigate their workbasket.

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

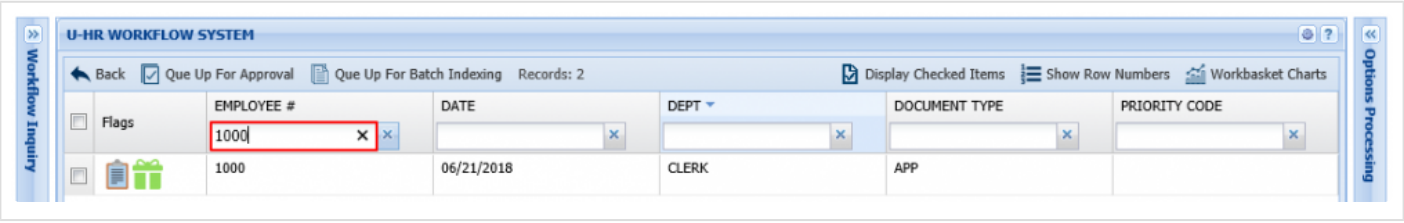
*	The document has been routed outside the normal routing profile.
	Call Back notice has been entered. A red callback symbolizes the call back notice is overdue. A green callback symbolizes a call back exists. A yellow callback symbolizes the call back notice is due today.
	Notes are attached.
0 – 9	Indicates priority routing.
	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.
	Stapled documents are available. View the document()s) stapled to the primary document.

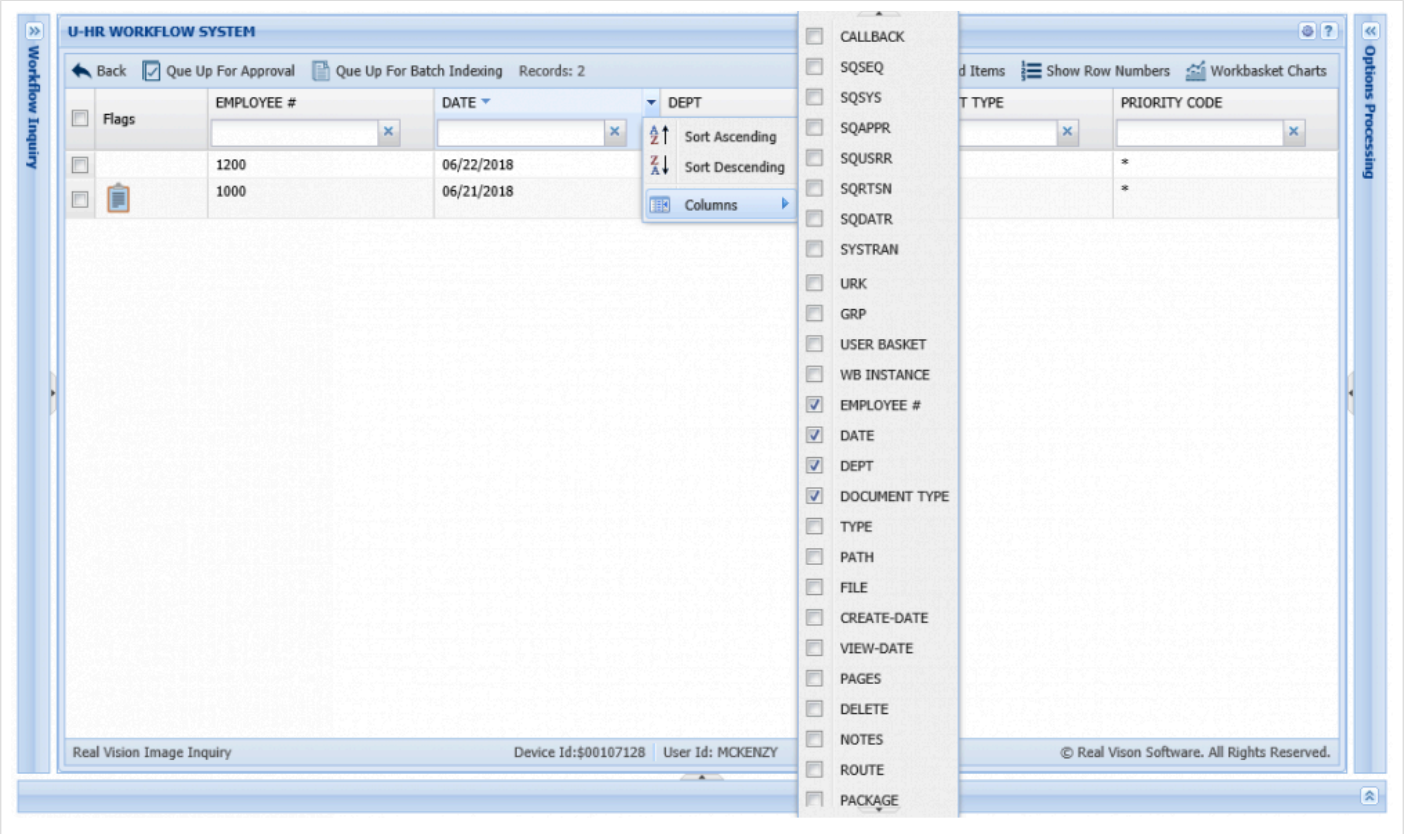
Sort: Sorting allows the user to change the order in which the workbasket items appear. Select the drop down arrow next to the index then choose Sort Ascending or Sort Descending.



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.



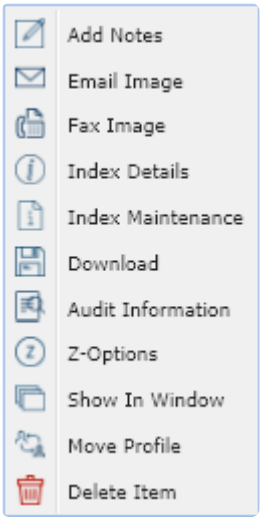
Columns: Pick the desired columns to be displayed. Select the drop down arrow next to any index then choose Columns.



6.1.1. WorkBasket Tools

To watch a video on this topic CLICK HERE

Right-Click Menu

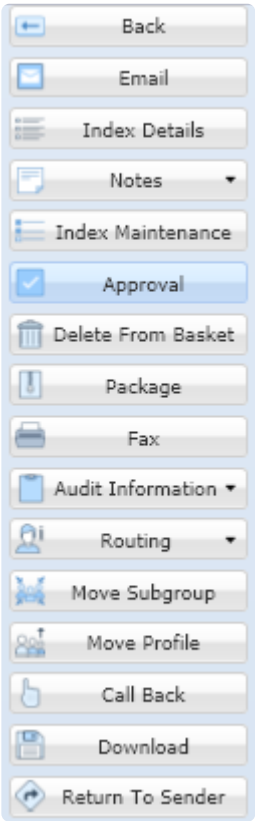


Show Notes	Display existing notes and add new notes.(*Will only appear if notes exist.*)
Add Notes	Permits the user to type a note. If there is a note attached to an image, will appear at the left side of the index listing under the Flags column.
Email Image	Email the selected document.
Fax	*Contact RVI Support 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	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: *Display Checked Items* allowing users to view all flagged items, *Show Row Numbers* to activate numerical designation of each row, and *Grid To Excel* to export the subfile list to an excel spreadsheet.
Workbasket Charts	Graphical representation of a user's workbasket with 4 options: **Aged Items**, **Active-Forthcoming**, **Totals**, and **Approval History**. Users can select from bar, pie, or line formats.

Image Display Top Toolbar

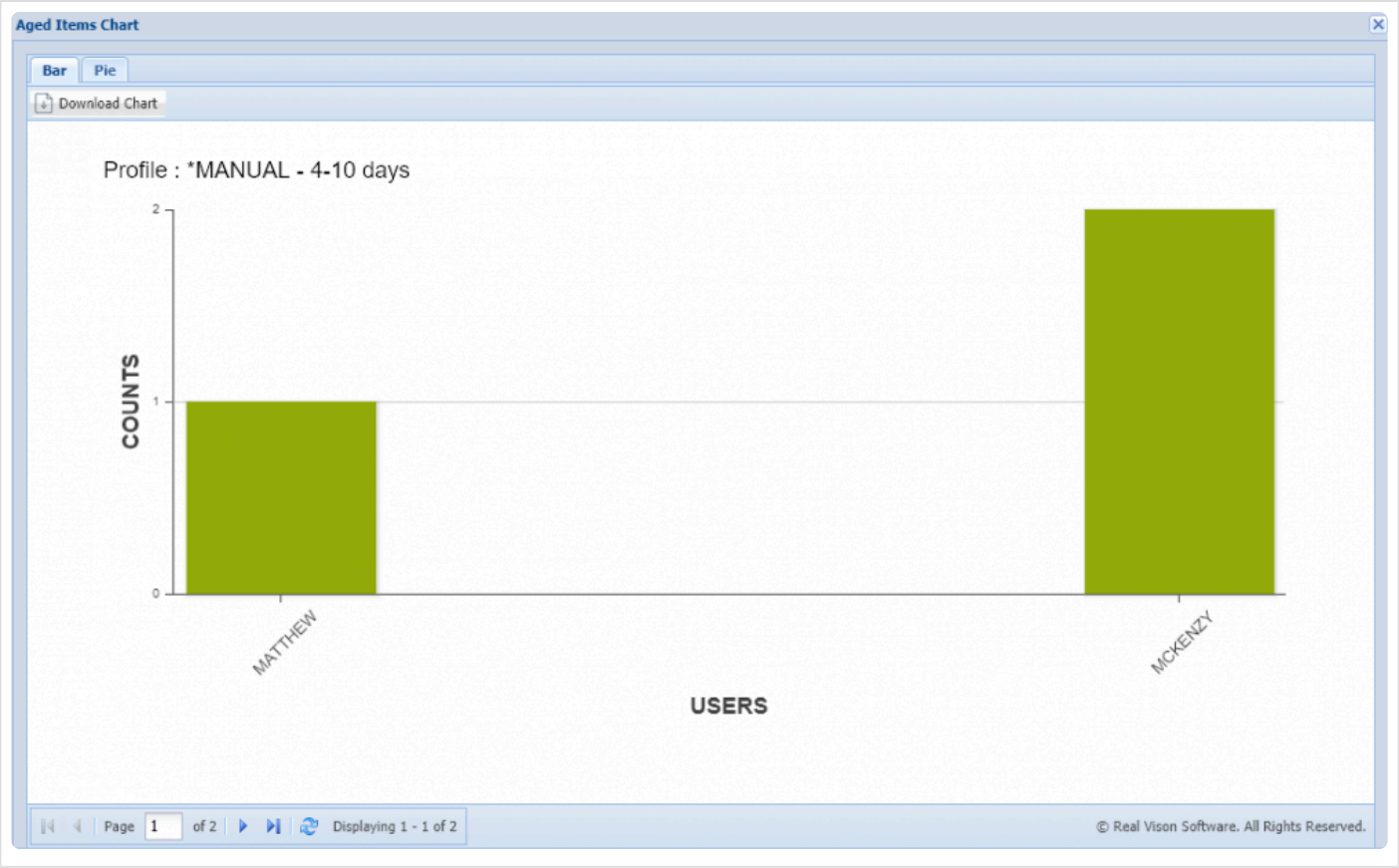


Back	Return to the list of items in the current workbasket.

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, will appear under the Flags column. If there is a package but some documents in the package 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). (*Button will only appear if a package exist.*)
Fax	*Contact RVI Support 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, will appear under the Flags column. If the call back is currently due, will appear. If the call back is overdue, 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.*

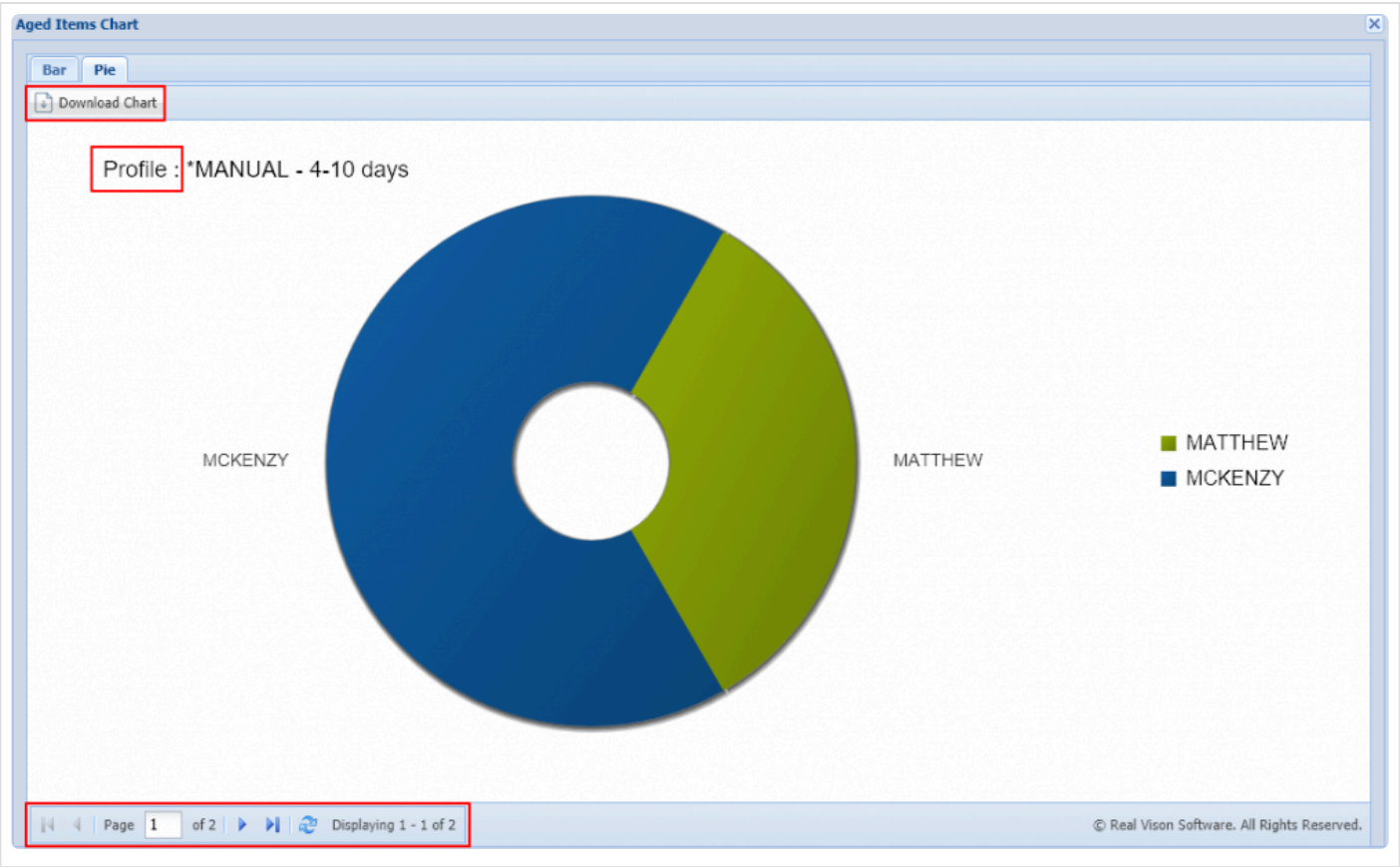
6.1.1.1. Aged Items Chart

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.

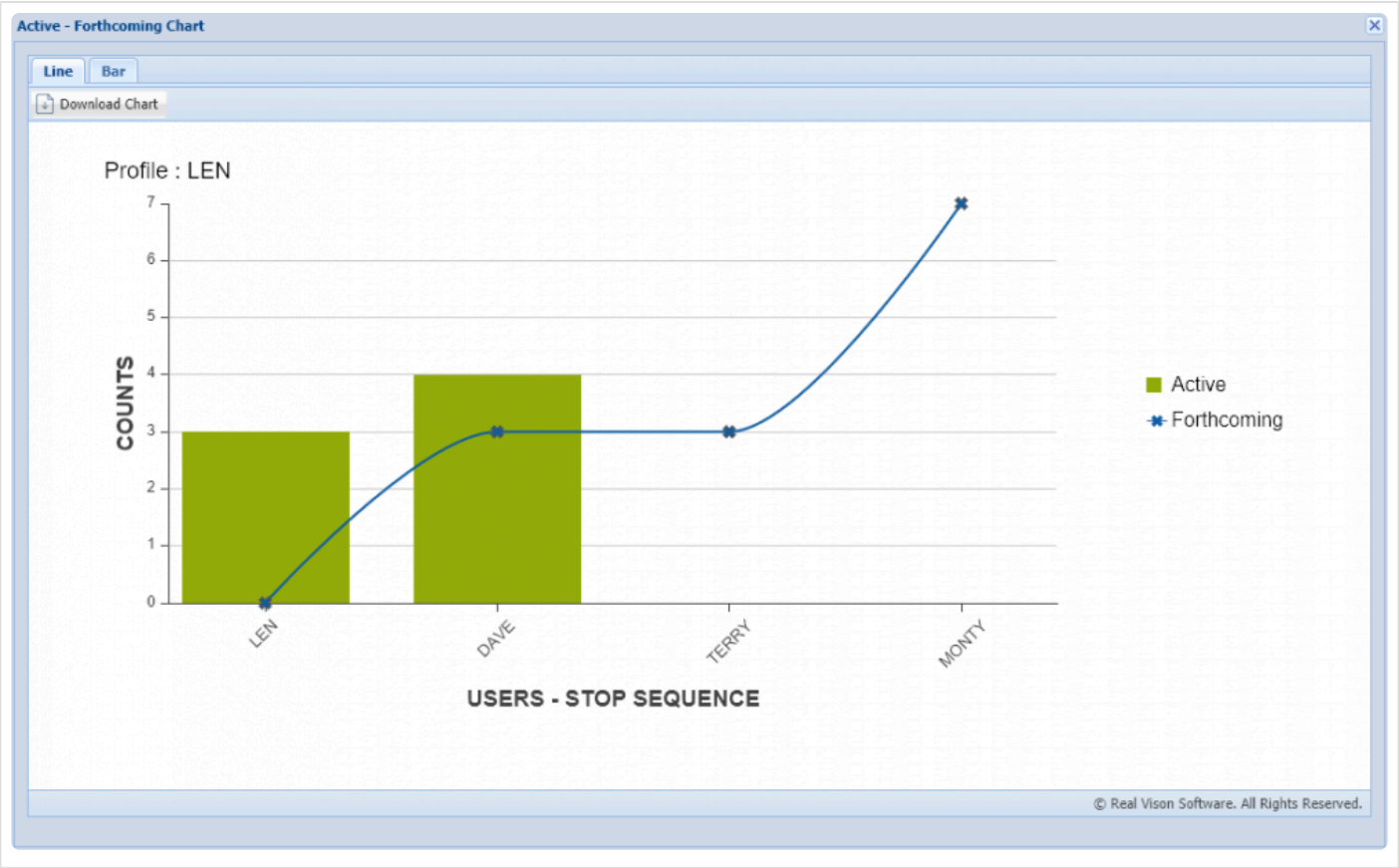
Another feature found in the Chart's window is the paging toolbar, located at the bottom left-hand corner of the window. The Paging toolbar handles navigating between each of the categories.

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.

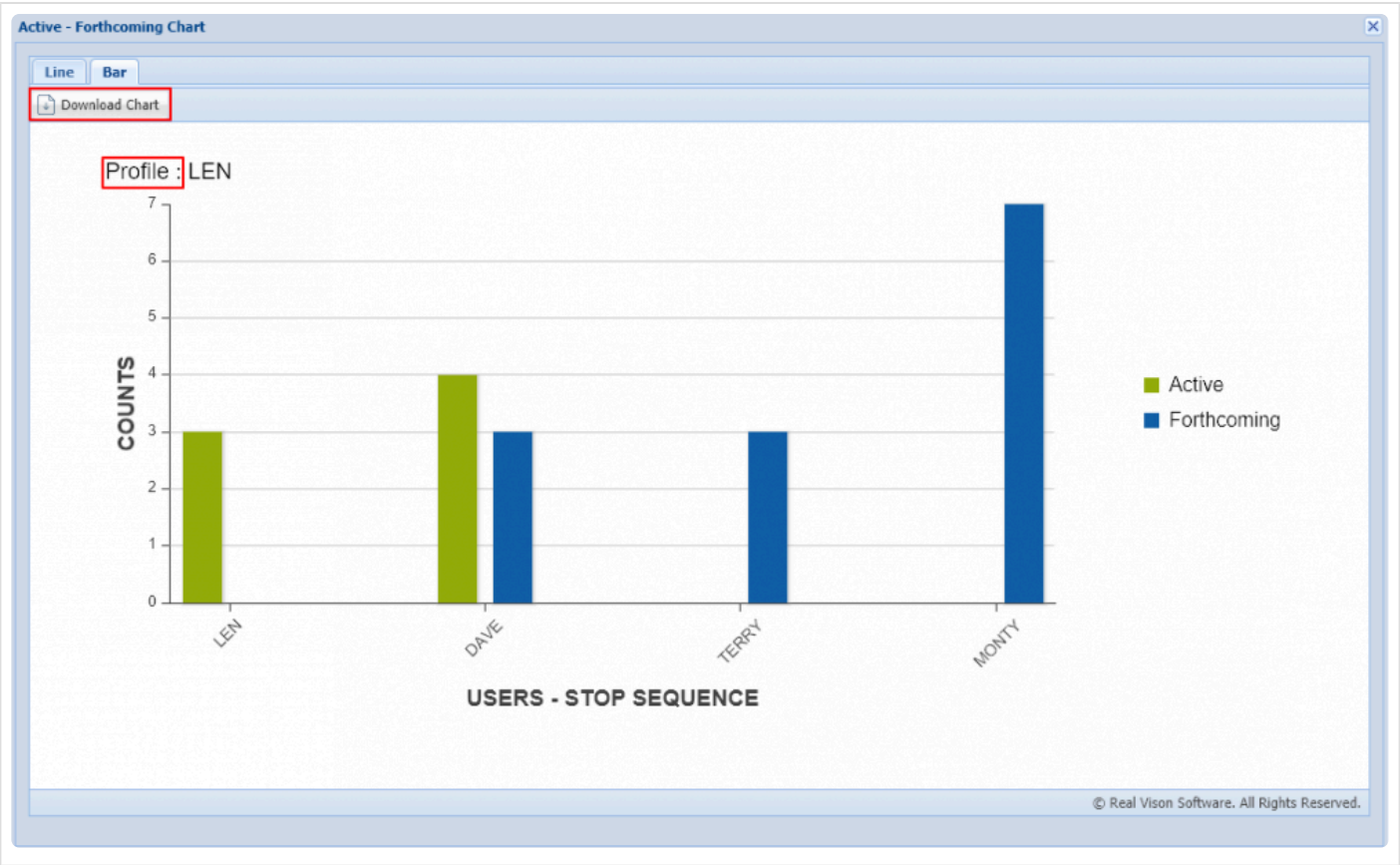


The Active-Forthcoming Chart uses tabs to display the data in two different formats, a combination of a bar and line charts. The Bars in the graph take the color green to denote the active items sitting on the user's sequence in the route. The blue line in the graph signifies the awaiting item to arrive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

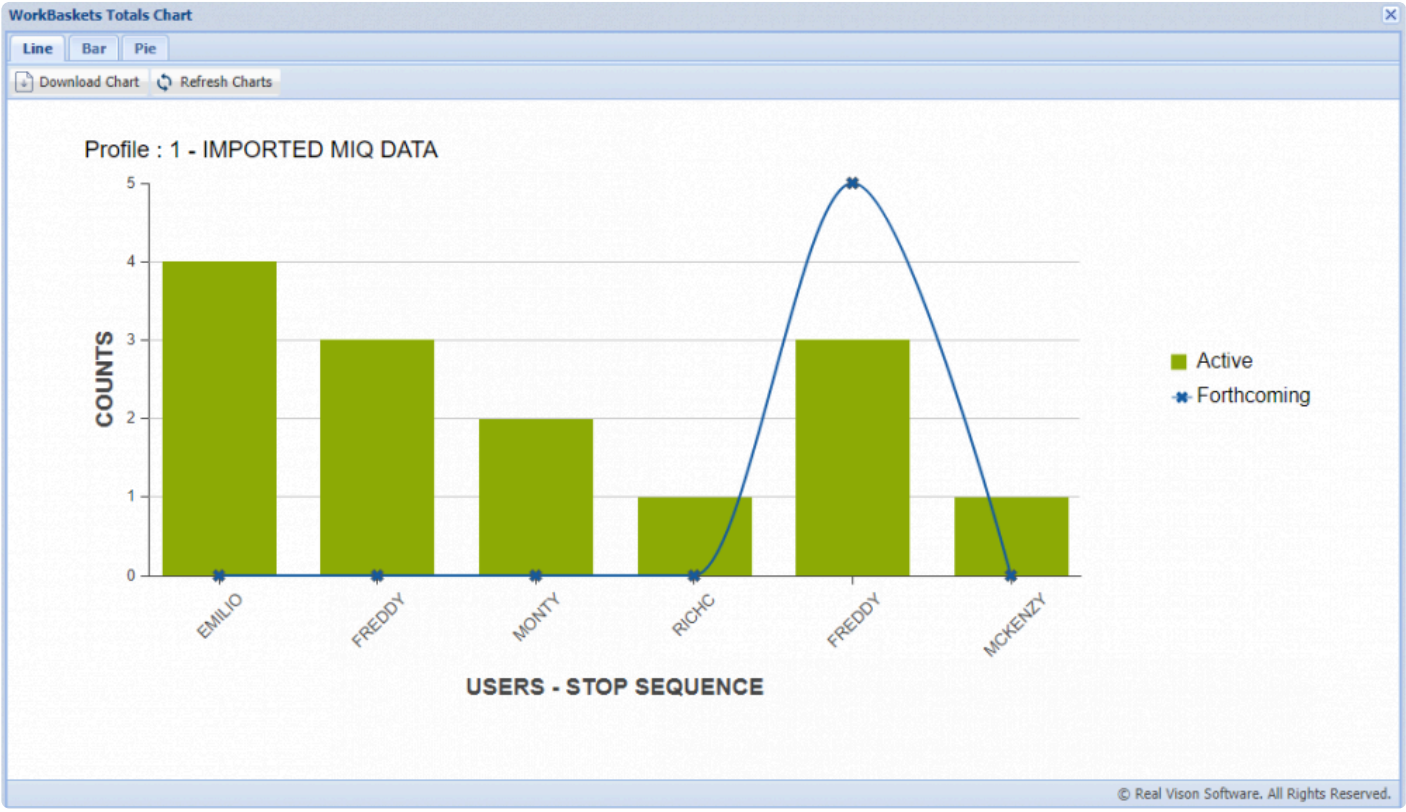


6.1.1.3. Totals Chart

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:


WorkBaskets Totals Chart
Line
Bar
Pie
Download Chart
Refresh Charts
Profile : 1 - IMPORTED MIQ DATA
COUNTS
0
1
2
3
4
5
EMILIO
FREDDY
MONTY
RICHC
FREDDY
MCKENZY
USERS - STOP SEQUENCE
Active
Forthcoming
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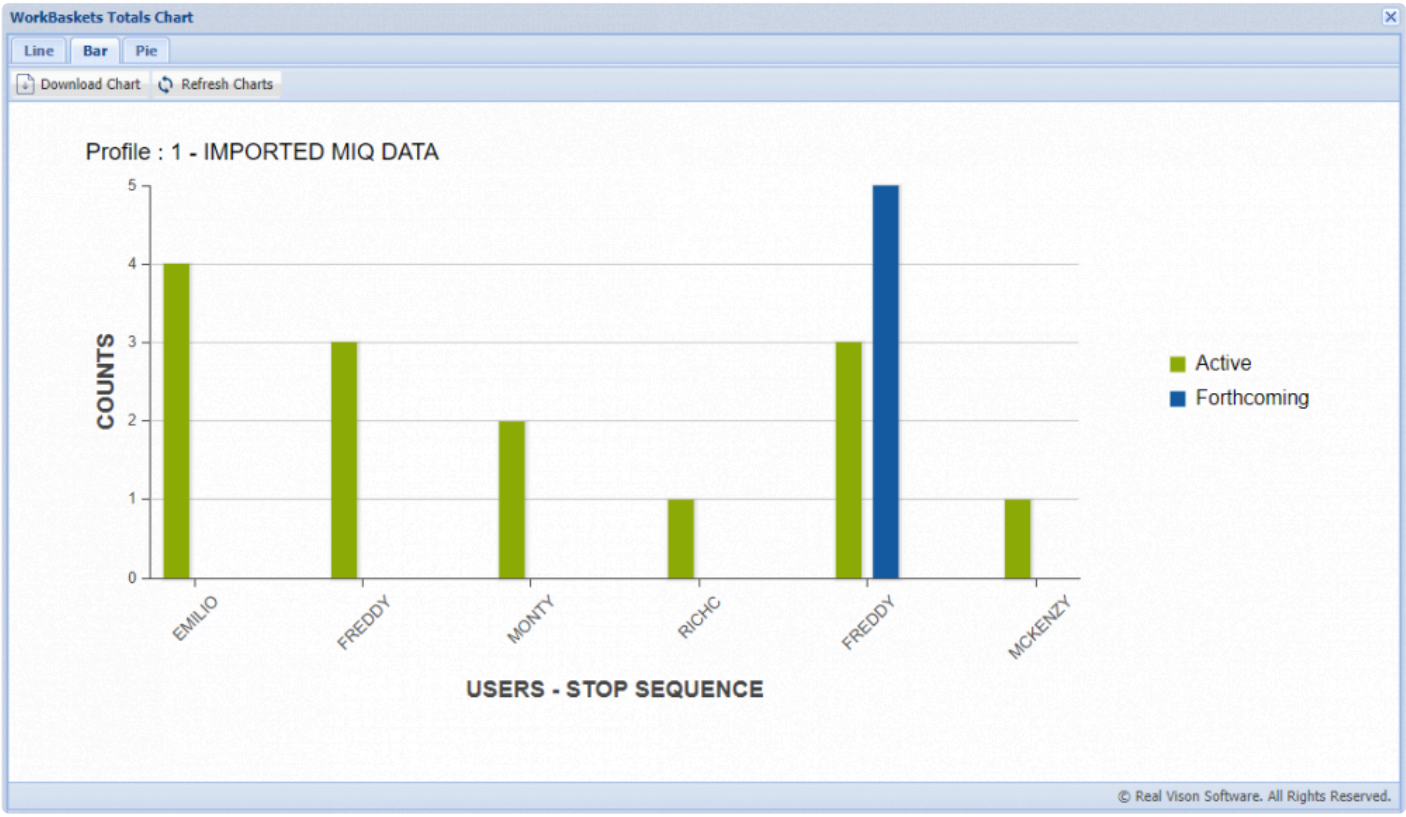
Bar Chart:


WorkBaskets Totals Chart
Line
Bar
Pie
Download Chart
Refresh Charts
Profile : 1 - IMPORTED MIQ DATA
COUNTS
0
1
2
3
4
5
EMILIO
FREDDY
MONTY
RICHC
FREDDY
MCKENZY
USERS - STOP SEQUENCE
Active
Forthcoming
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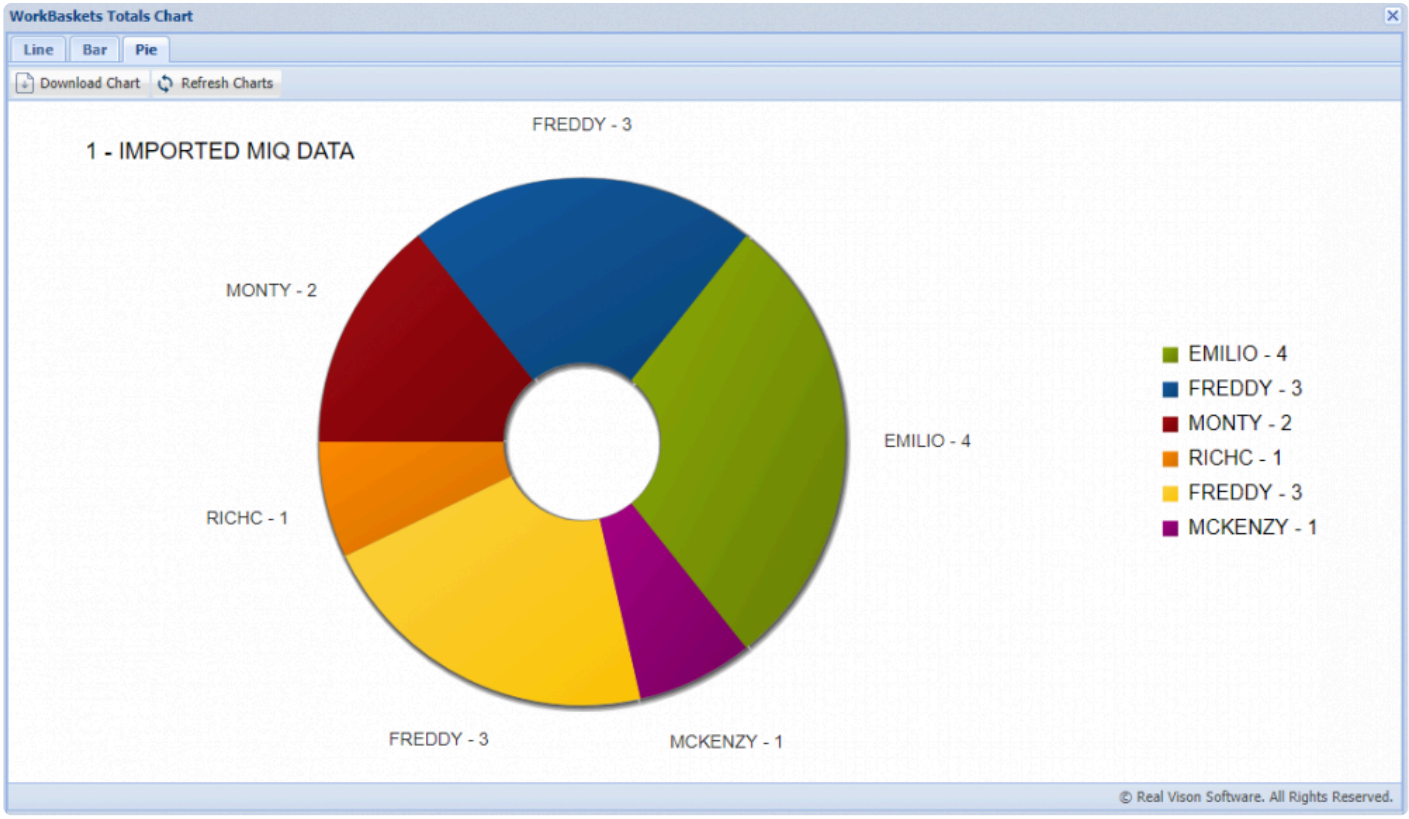
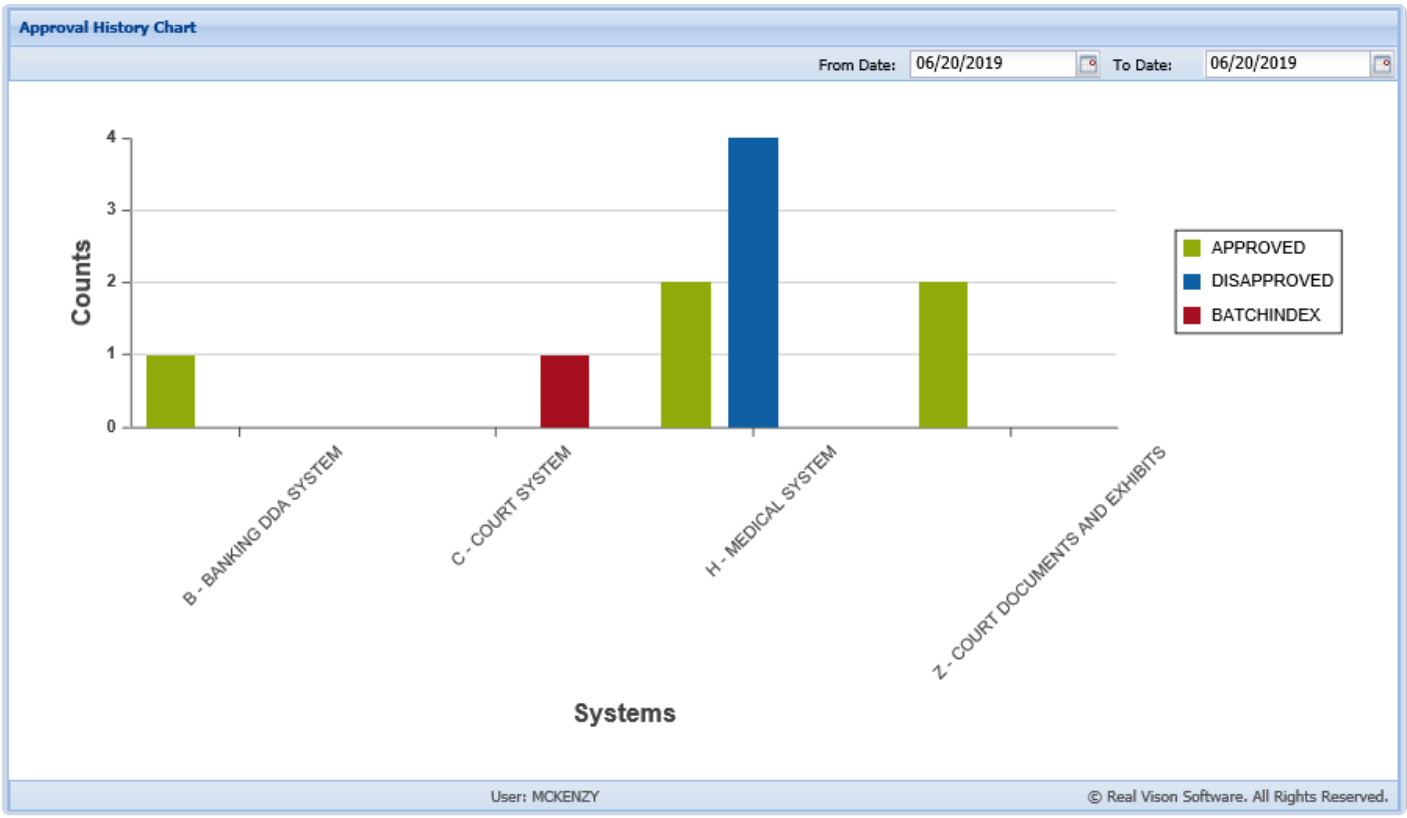
Pie Chart:

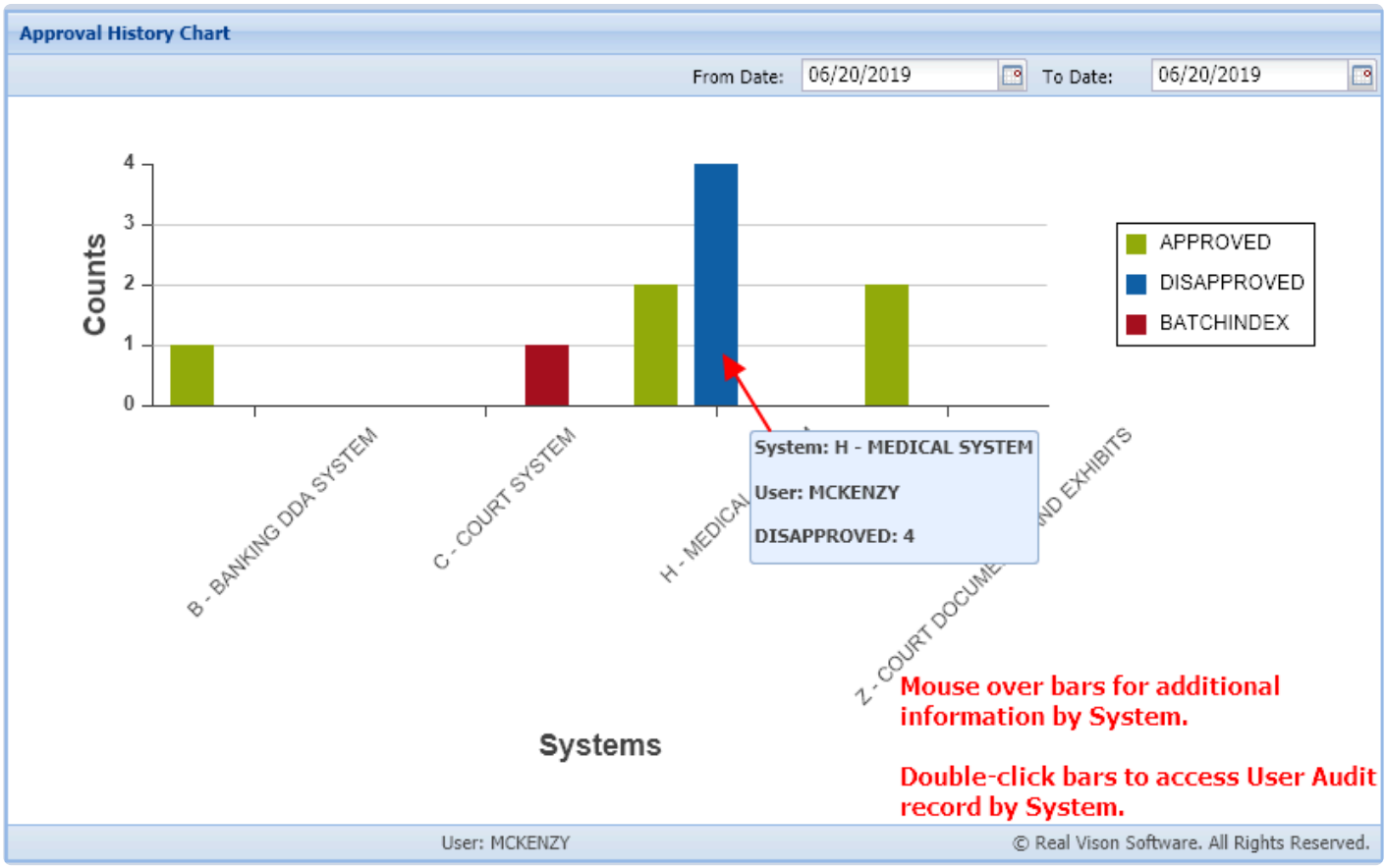


6.1.1.4. Approval History Chart

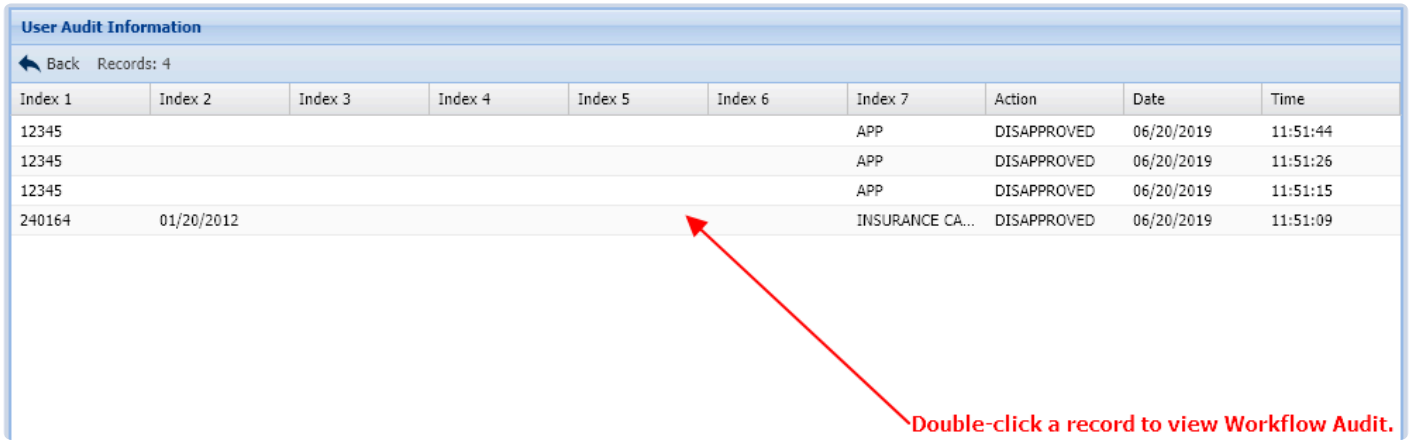
The Approval History Chart is a visual representation (Bar format) of all items by System that have been approved, disapproved, or batch indexed for the current user for the specified date range.



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.



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

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

Workflow Audit Information

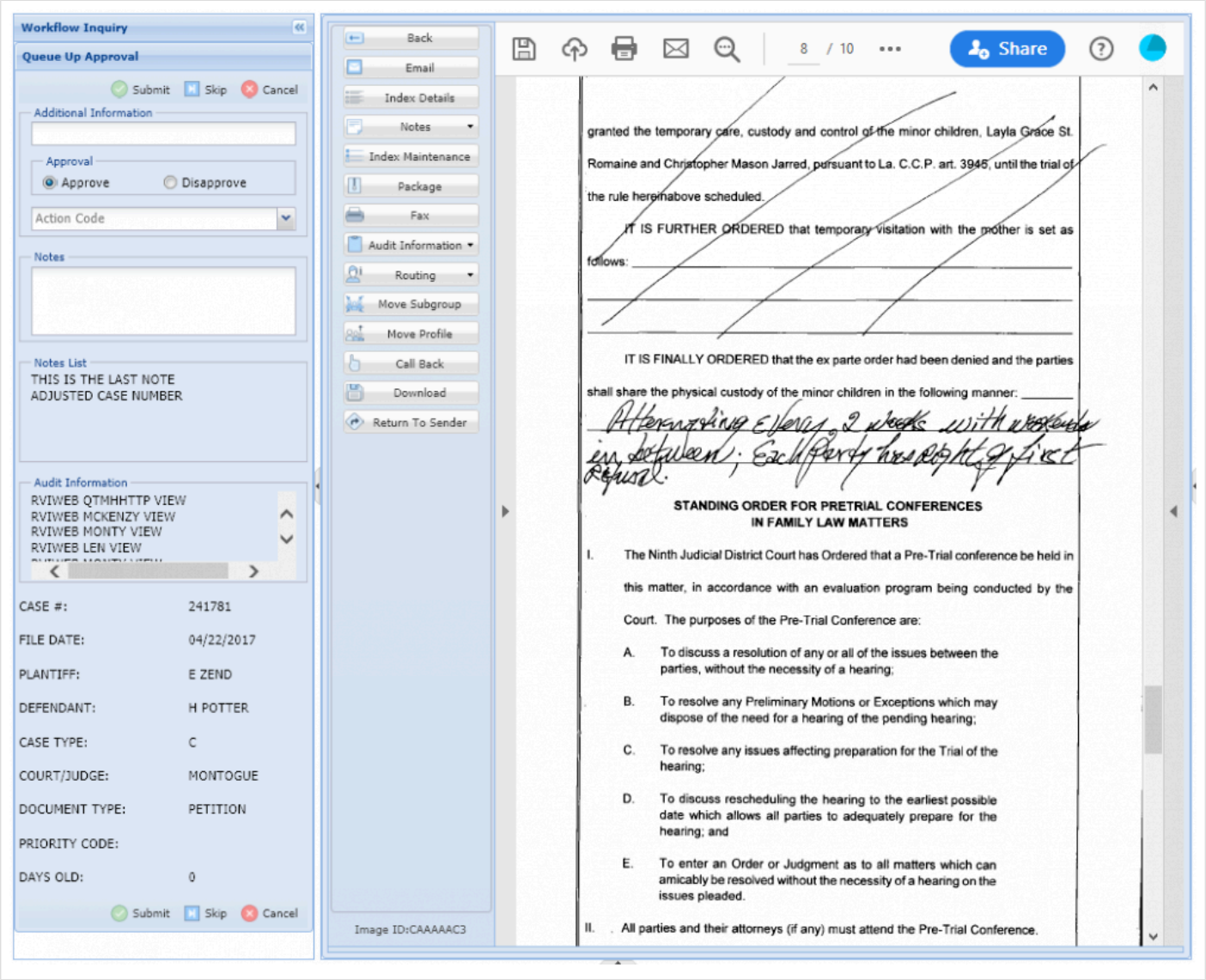
Back Records: 11

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

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



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

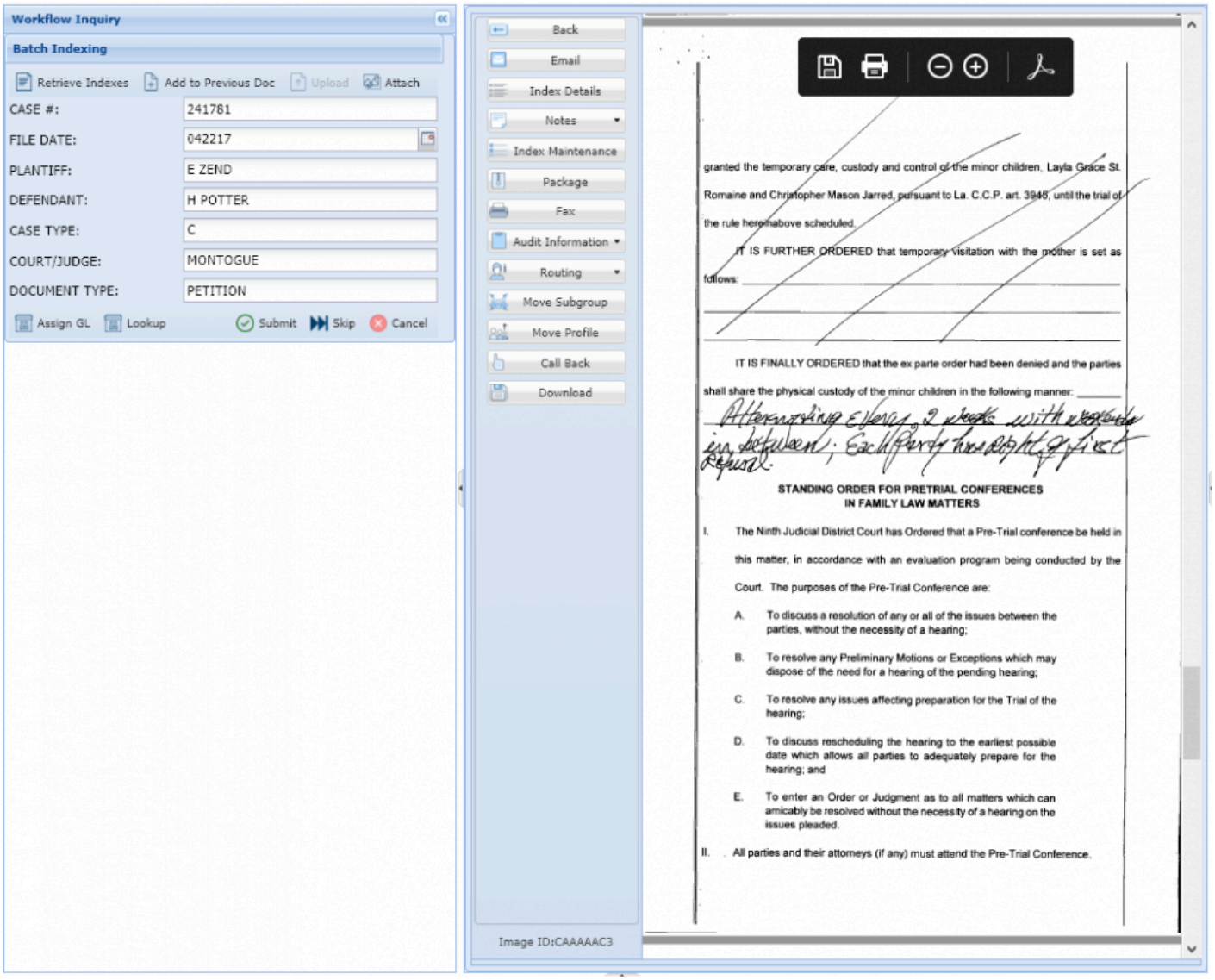
Codes:	needed.
Notes:	Add or view existing notes associated with the document.
Notes List:	Listing of existing notes.
Audit Information:	Track the events of the image during the approval process.
Indexes:	View the index values and file information associated with the document. This is an informational 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.
Package:	Displays a list of documents that make up the package. Missing items will be labeled (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.(*The Package icon is only present when a package is setup.*)
Fax:	*Contact RVI Support 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 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.*

6.1.3. 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.



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

Retrieve Indexes:	Used to retrieve index information from a customer's database. **Custom Feature** *Will only appear for customers specifically setup for this feature. Contact RVI Support for details on integrating this feature.*
Add to Previous Doc:	Append the document in the window with the previously indexed document.
Upload:	Move the document selected during the Attach process to the RVI system. The Upload button will become active once the Attach option is used.The newly attached document will be available for viewing immediately after the upload.
Attach:	Add additional documents to the currently displayed document using the browse import feature. Select to attach and move the document into the RVI system.
Indexes:	Automatically passed but changeable. If corrections need to be made the user can type over the existing values.
Submit:	Click Submit to complete the process. This will process the information and place the next available image into the window.
Skip:	Ignore the image in the window and hold it in the queue for future action.
Cancel:	Close the indexing window and return the image to full screen.
Back:	Return to the list of images available for batch indexing.
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.
Index Maintenance:	Permits the user to update the index information for the selected image. This option also allows for deletion of the document.
Package:	Displays a list of documents that make up the package. Missing items will be labeled (MISSING). If there is a package, will appear under the Flags column. View package documents by double-clicking the record.(*The Package icon is only present when a package is setup*.)
Fax:	*Contact RVI Support 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 document 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 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)Copyright RVI 1992, 1999
                                                                RVUS1FM/FORMAT0

              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

  F3 =Exit                                              Enter =Continue

MA    D
```

5. F10 = Add User

```
User's Pop Queues Maintenance (c)Copyright RVI 1992, 1999
                                                  RVPQMFM/SFLCTL
 X=Select
 Position To: __________
 X User        Description
 _ KIMAP       KIMBERLY IN ACCOUNTING
 _ MCKENZY     MCKENZY'S POP A QUEUES
 _ MONTY       MONTY'S QUES TO POP

                                                        Bottom
 F3 =Exit                F10 =Add User        Enter =Continue
```

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

```
User's Pop Queues Maintenance (c)Copyright RVI 1992, 1999
                                                RVPQMFM/SFLCTL
 X=Select
 Position To: ___________
 X User        Description
 _ KIMAP       KIMBERLY IN ACCOUNTING
 _ MCKENZY     MCKENZY'S POP A QUEUES
 _ MO
            User-Specific Parameters
      User. . . .:  MAC
      Description:  MAC COURT DOC_
      F3 =Exit                      Enter =Continue
                                                      om
F3 =E                                                 ue
```

7. F10 = Add Next Entry
   To change an existing entry, select that entry with an **X**.
   Press to continue.

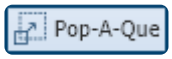
```
User's Pop Queues Maintenance                  (c)Copyright RVI 1992, 1999
 User. . . . . . . .:  MAC        MAC COURT DOC                RVUS2FM/CATLSTCT
 Position To Sequence Number:  00
 Type Option, Press Enter
  X =Maintain This Entry      O =Move This Entry          D =Delete This Entry
  B =Insert An Entry Before   A =Insert An Entry After
 Opt Sequence    Routing Profile

 Page Up =Previous Page      F10 =Add Next Entry      Page Down =Next Page
 F3 =Exit                                                Enter =Continue
```

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

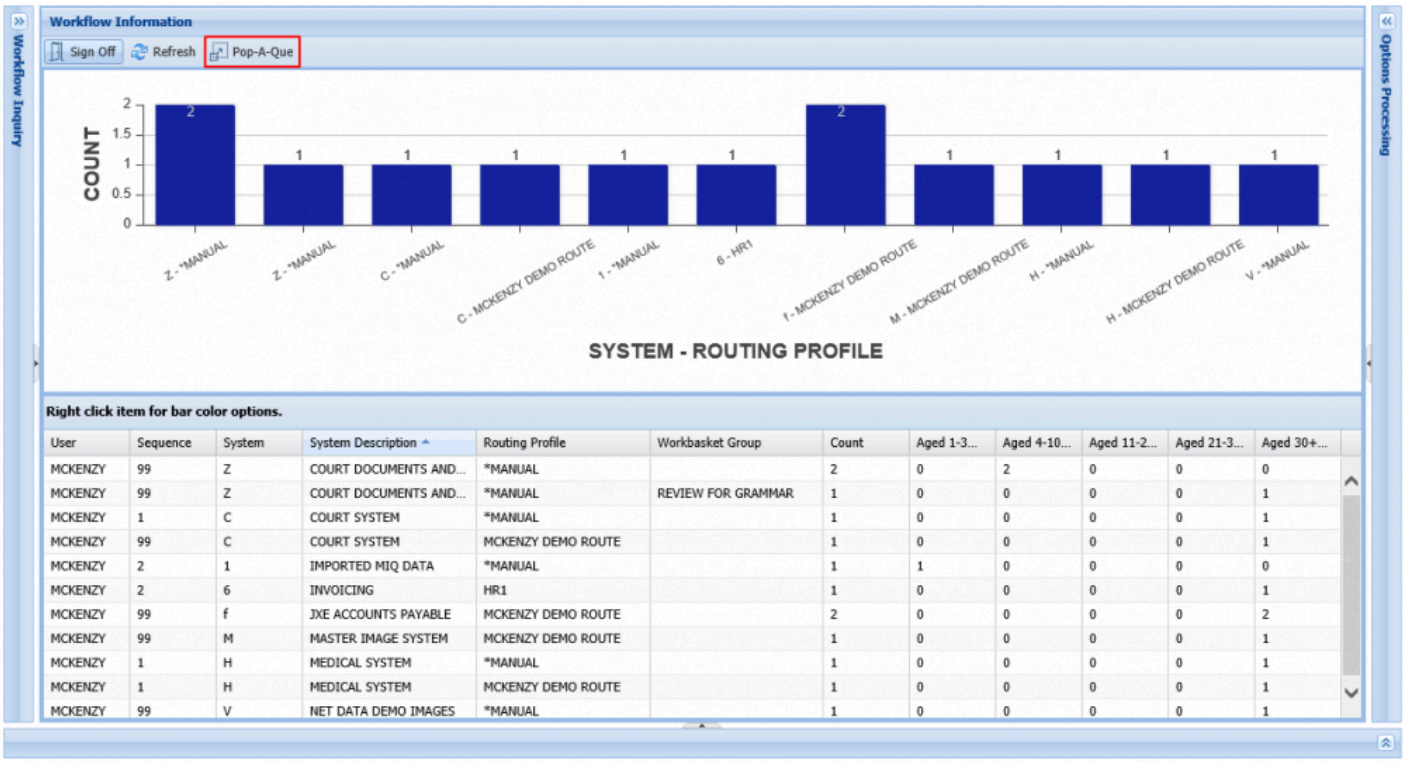
```
User's Pop Queues Maintenance                    (c)Copyright RVI 1992, 1999
                                                              RVUS2FM/FORMAT2


                  User: MAC
              Sequence: 01

       Routing Profile: MCKENZY                          F8 To Select
           Delete Code: _    (D=Delete)




 F3 =Exit                        F12 =Cancel                Enter =Continue
```

Repeat Steps 7 – 8 as needed.

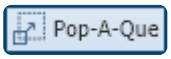
```
User's Pop Queues Maintenance                    (c)Copyright RVI 1992, 1999
 User. . . . . . . . .:  MAC        MAC COURT DOC                RVUS2FM/CATLSTCT
 Position To Sequence Number:  00
 Type Option, Press Enter
  X =Maintain This Entry      O =Move This Entry          D =Delete This Entry
  B =Insert An Entry Before   A =Insert An Entry After                     1
 Opt Sequence     Routing Profile
  _     00        MCKENZY




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.



User	Sequence	System	System Description	Routing Profile	Workbasket Group	Count	Aged 1-3...	Aged 4-10...	Aged 11-2...	Aged 21-3...	Aged 30+...
MCKENZY	99	Z	COURT DOCUMENTS AND...	*MANUAL		2	0	2	0	0	0
MCKENZY	99	Z	COURT DOCUMENTS AND...	*MANUAL	REVIEW FOR GRAMMAR	1	0	0	0	0	1
MCKENZY	1	C	COURT SYSTEM	*MANUAL		1	0	0	0	0	1
MCKENZY	99	C	COURT SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	2	1	IMPORTED MIQ DATA	*MANUAL		1	1	0	0	0	0
MCKENZY	2	6	INVOICING	HR1		1	0	0	0	0	1
MCKENZY	99	f	JXE ACCOUNTS PAYABLE	MCKENZY DEMO ROUTE		2	0	0	0	0	2
MCKENZY	99	M	MASTER IMAGE SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	*MANUAL		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	99	V	NET DATA DEMO IMAGES	*MANUAL		1	0	0	0	0	1

When 

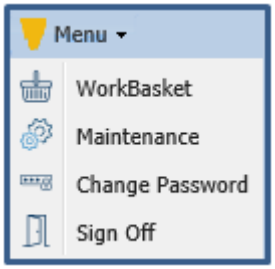
is pressed:

- 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.

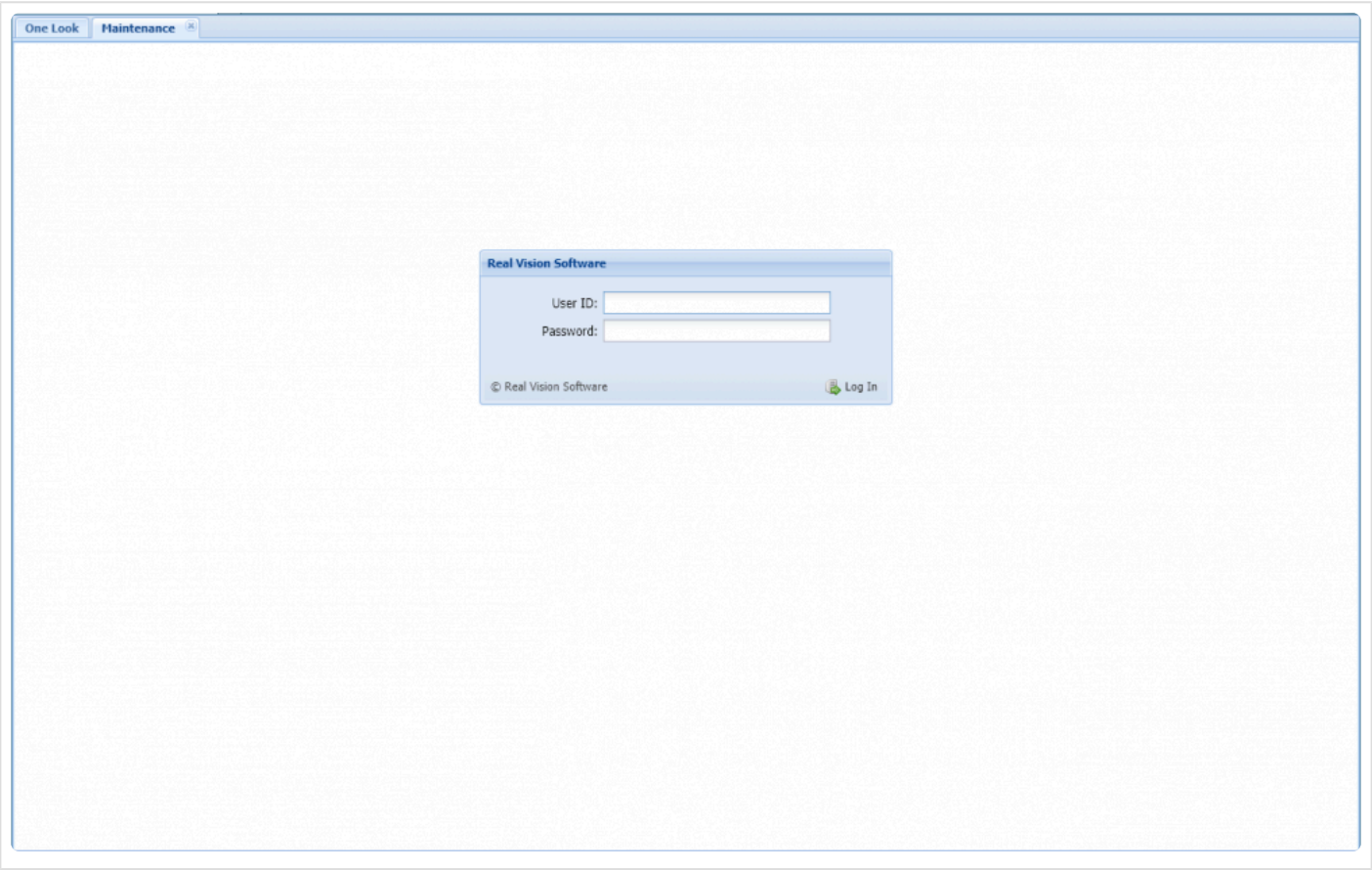
6.2. Maintenance

> **!** 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.



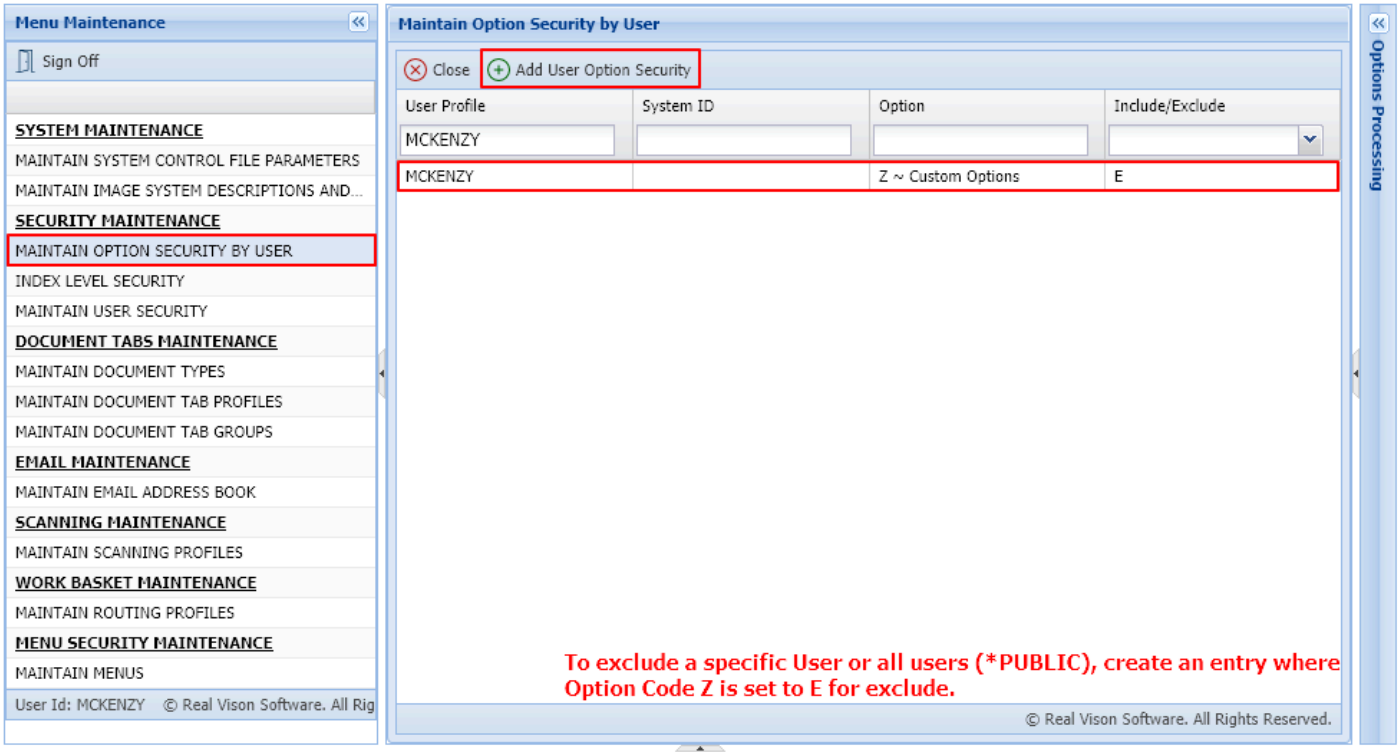
One Look maintenance menu allows maintenance for System Codes, Security, Document Tabs, Email, Scanning, Work Baskets.

6.3. Custom Menus

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

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.



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.*)

```
Real Vision Customer Specific Maintenance Screen    (c)Copyright RVI 1992,1999
X=Maintain            Real Vision Custom Menu Maintenance        RVMNUPMD/SFLRCD
C=Copy    Menu Heading: ____________________________________________________
M=Move Copy/Move
X Seq    To Seq     Option Description                      Secured?   Enabled?
_   1      ___      Session KeepAlive                                     Y
X   2      ___      IMAGE CLEANUP - SYSTEM Z                   Y          Y
```

Put an X next to an existing record OR create a new record using F9 = Add Option

```
                                                                          +
                                                F10 =Test User
 F3 =Exit     F8 =ReSequence     F9 =Add Option  F7 =Print   Enter =Continue
```

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  ECUPD
                                                   RVMNUUFD/TSUBCTL
Option #:   2    Menu Option      Seq#:      2
                                  Desc:    IMAGE CLEANUP -          sts.
Option Enabled?: Y   (Y/N)
Setting Enabled To N Will Re                Users:
Press F5 If Security By User      Pos To:                           ity.
                                            QTMHHTTP
Command To Execute (F4 To Pr                MCKENZY                  e):
call CLNUPSYSIZ                                                      ______
                                                                     ______
                                                                     ______
                                                                     ______
                                                                     ______
                                                                     ______
                                                                     ______
                                  F3 =Exit
                                                                     ______
 F3 =Exit        F5 =Maintain User Security     F23 =Delete   Enter =Continue
```

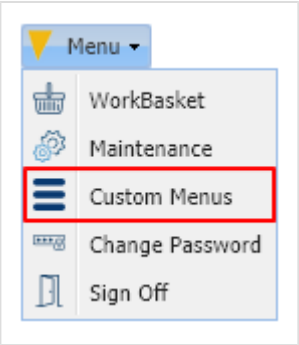
To Add a customer specific menu option in One Look:

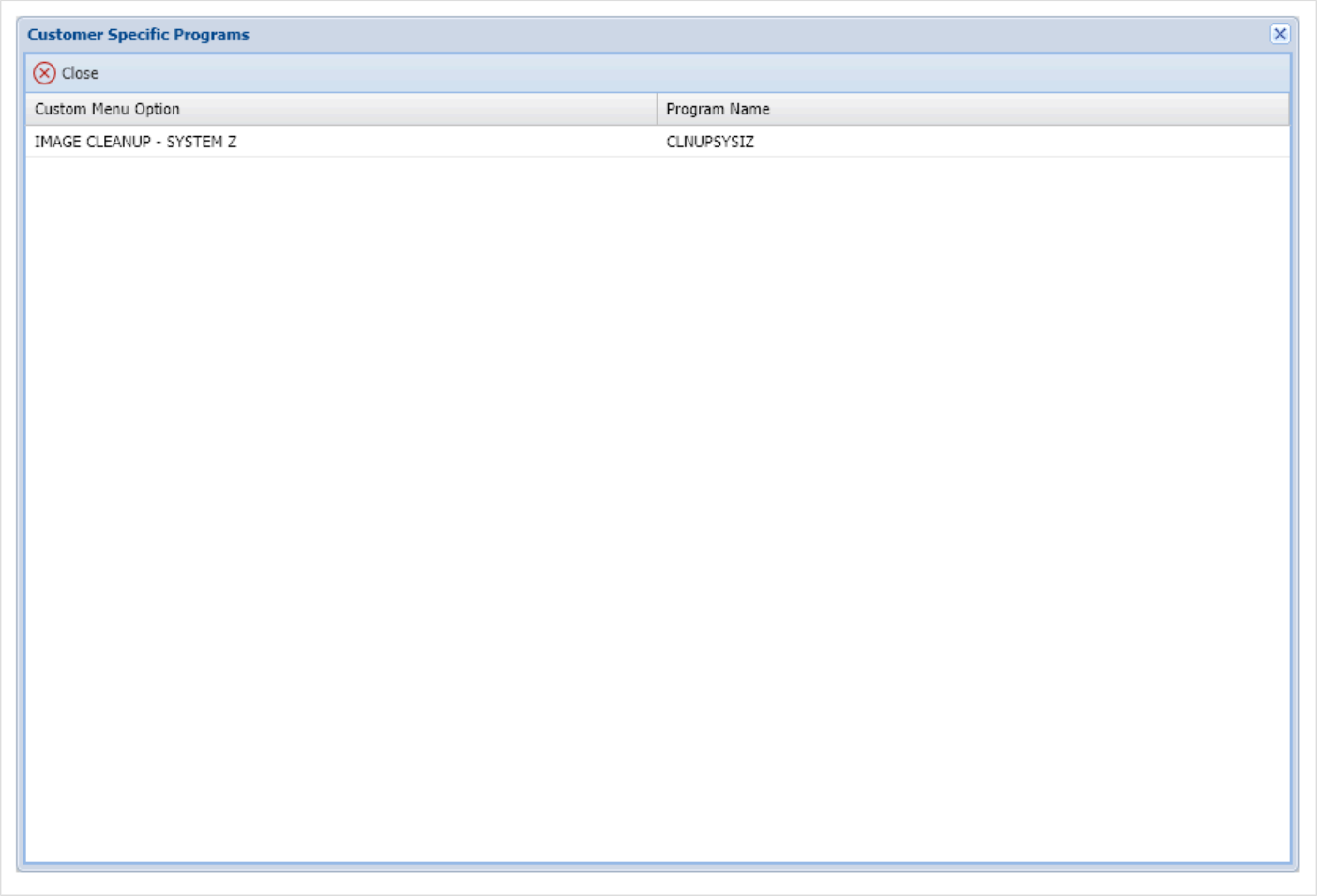
1. Add user QTMHHTTP

2. Add the user id(s) that will have access to this menu option.

The setup is complete!

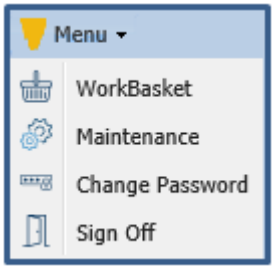
Users specified in Step 6 will see the option when then select *Menu, Custom Menus* from One Look.





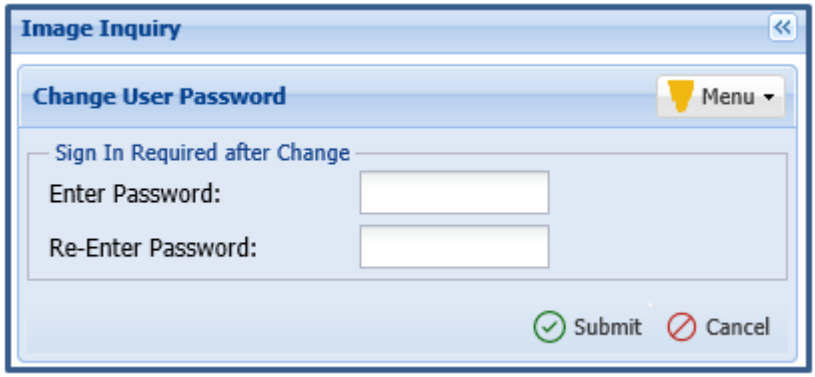
6.4. Change Password

1. Select Menu, Change Password.



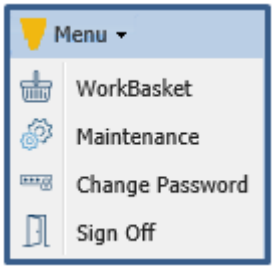
2. Enter a valid password.

(**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.)



6.5. Sign Off

Select Menu, Sign Off then close the browser.



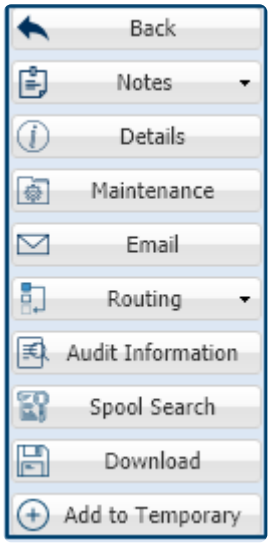
7. IMAGE INQUIRY TOOLBOX

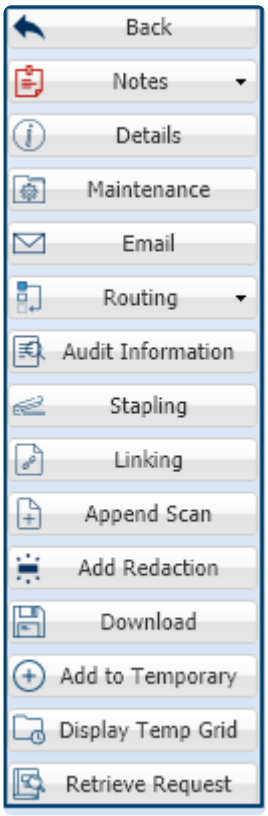
One Look offers a variety of tools and menus to accomplish tasks within the RVI system. For quick and easy access, many options such as notes, email, and image details are available in multiple locations throughout One Look.

Help & Settings

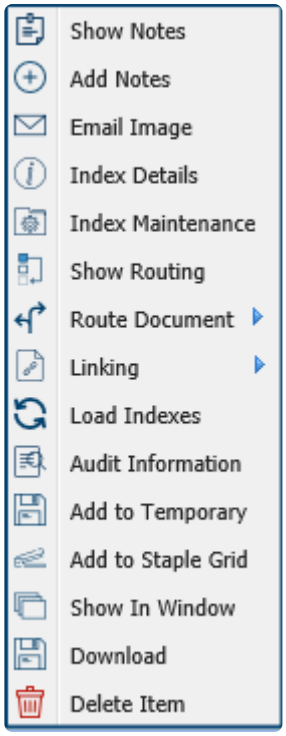
Navigation & Appearance

Display & Left Side Functions





Inde List & Right Click Menu

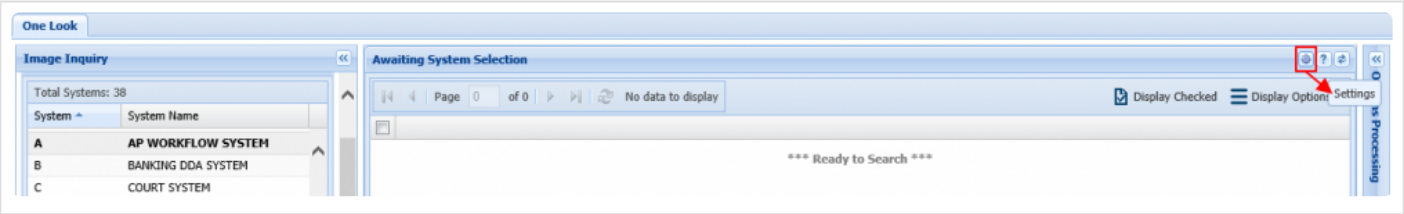


7.1. Help & Settings

To watch a video on this topic CLICK HERE

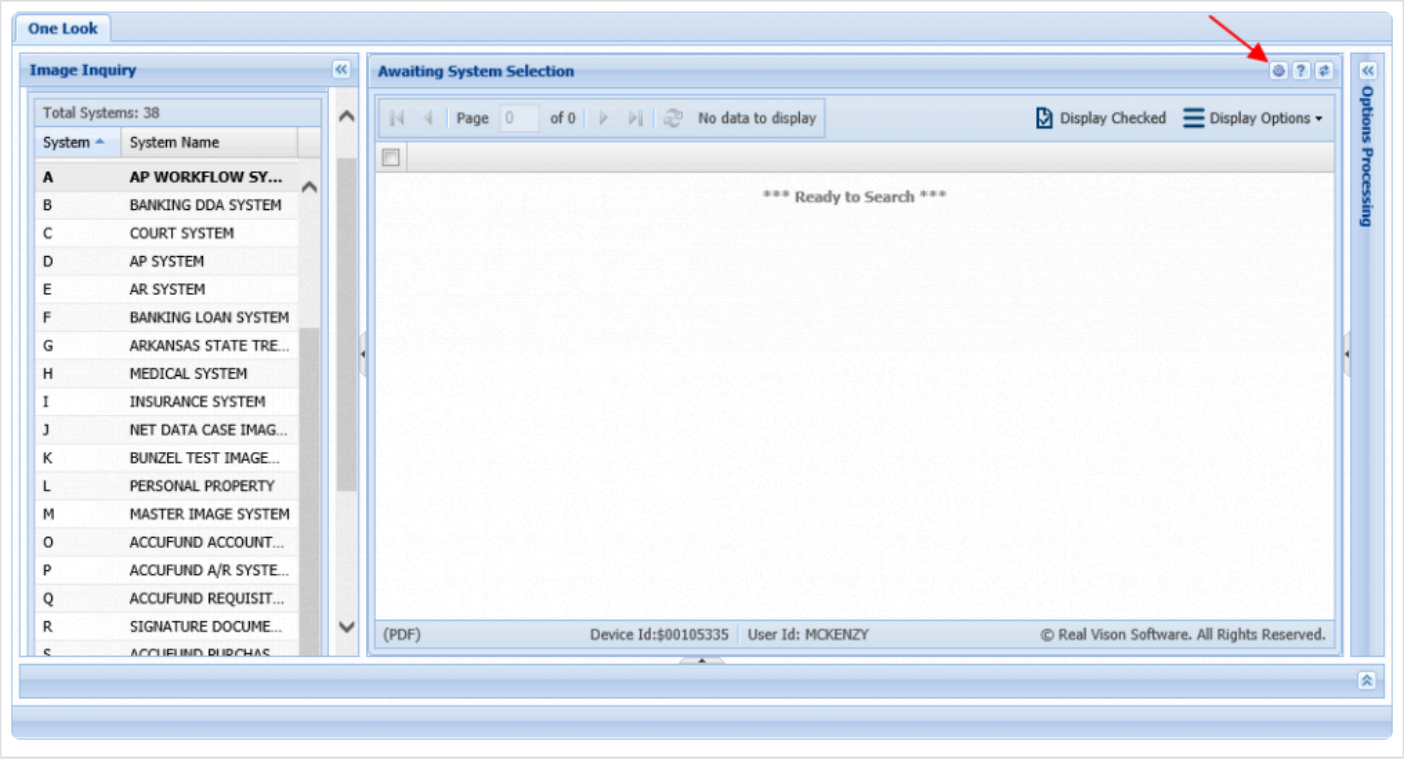
(Located in the top right-hand corner of the search results window in Image Inquiry.)

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

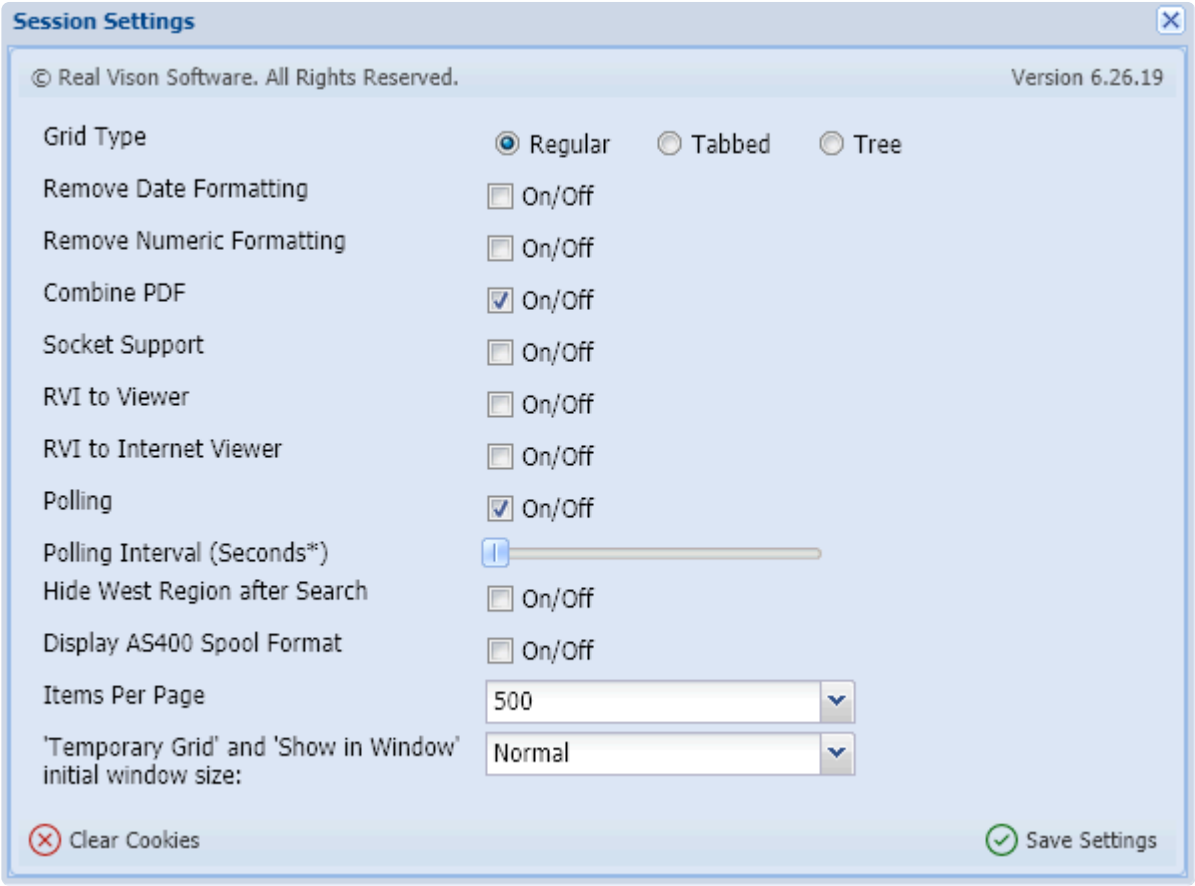


To access the session settings:

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



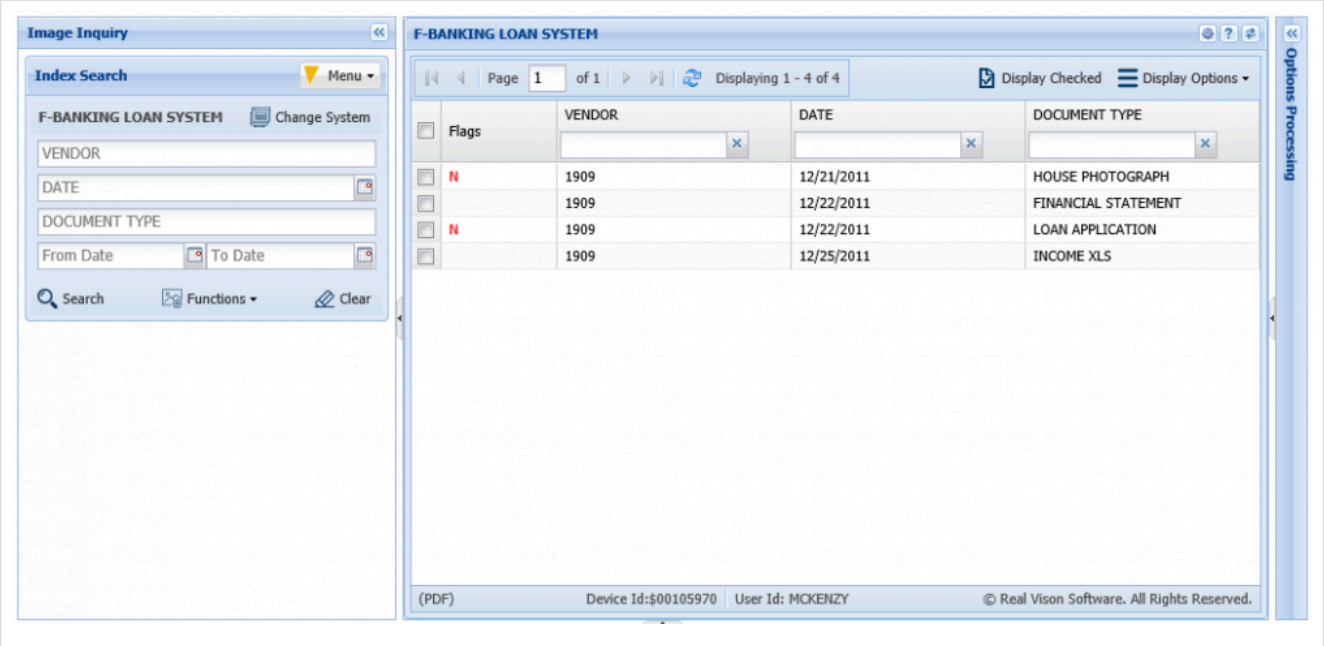
2. The session settings window will display.



Available Options:

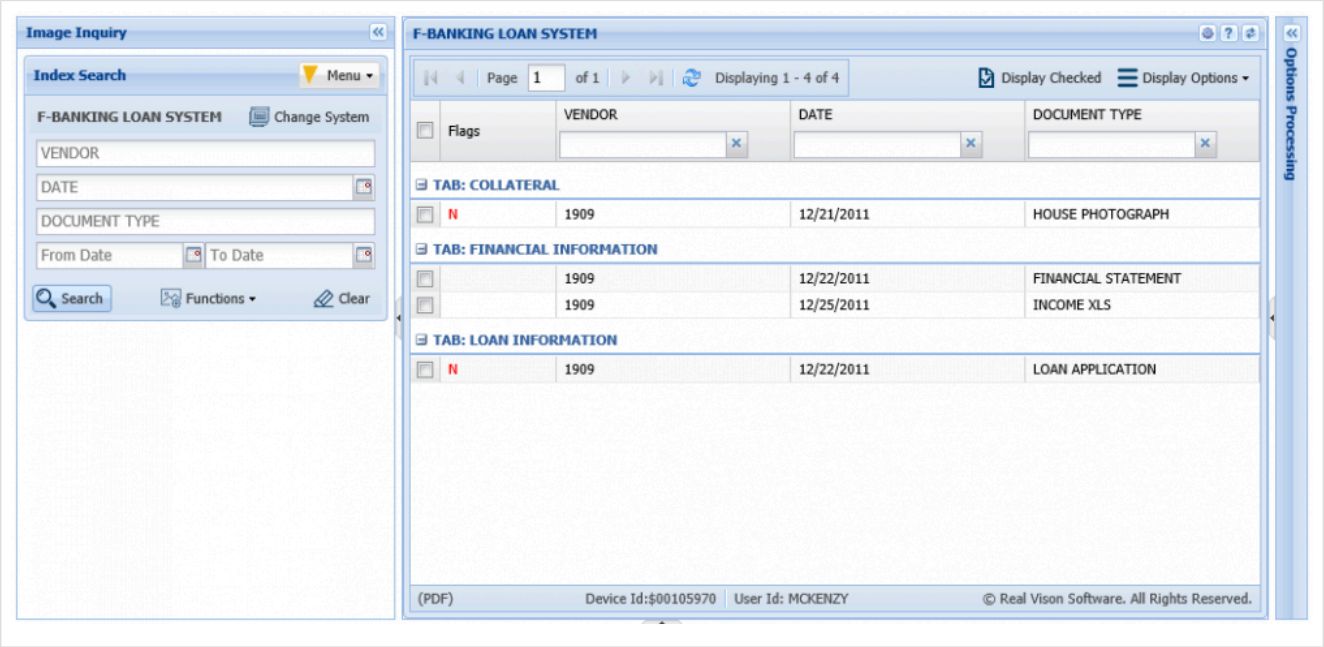
1. **Grid Type**
   Controls the look of the index list in the right window pane.

- *Regular*
  Displays the index list based on create date.



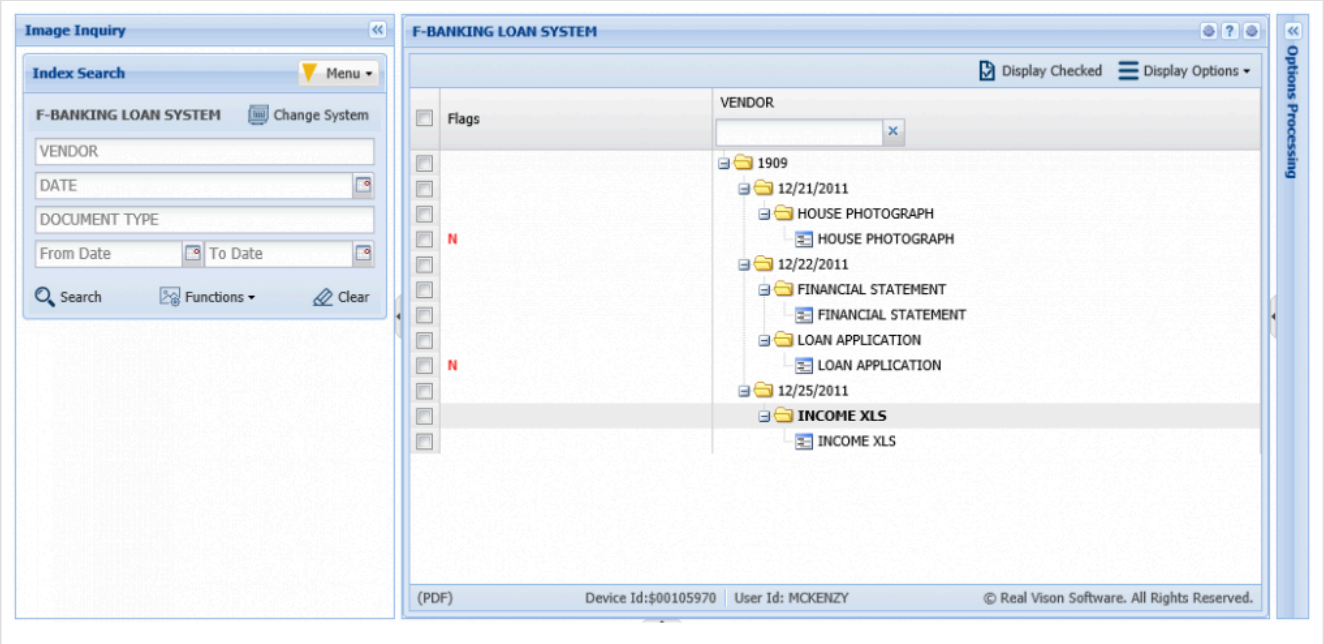
- *Tabbed*

  Displays the index list based on document tabs.



- *Tree*

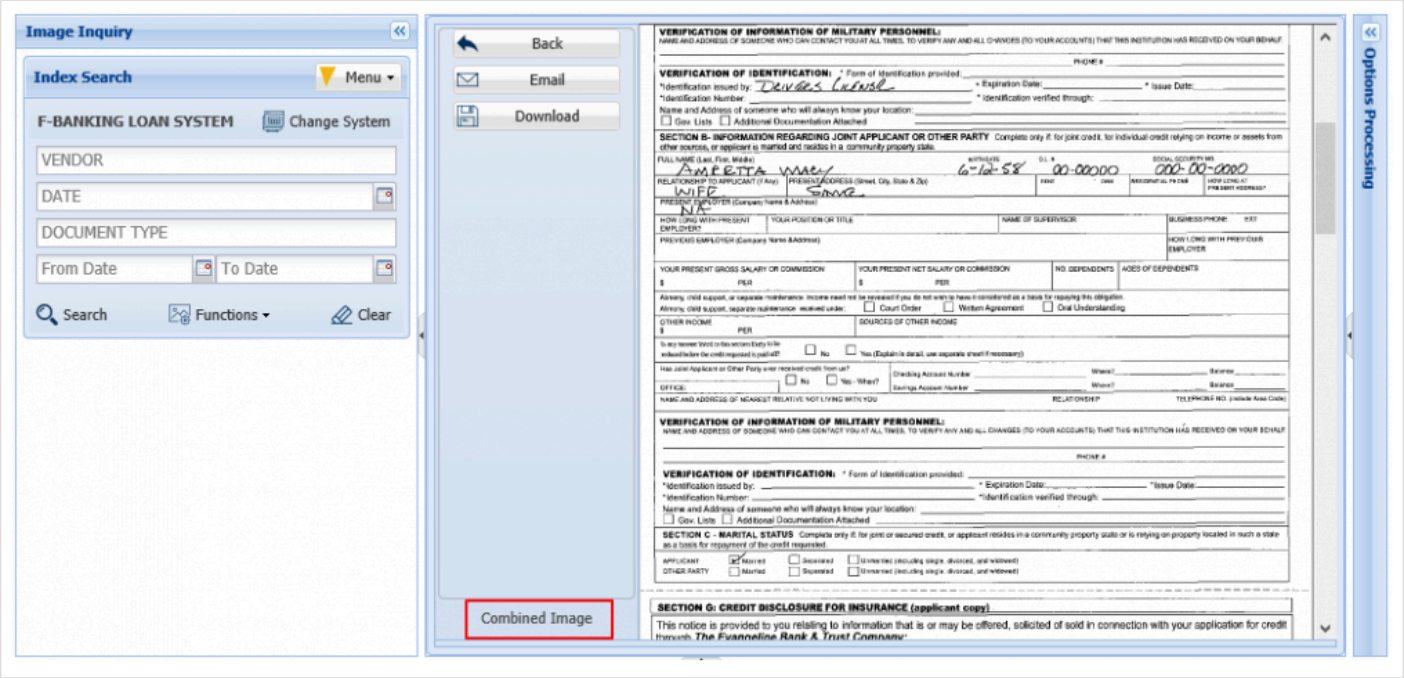
  Displays the index list in an expandable tree format starting with index 1.



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.

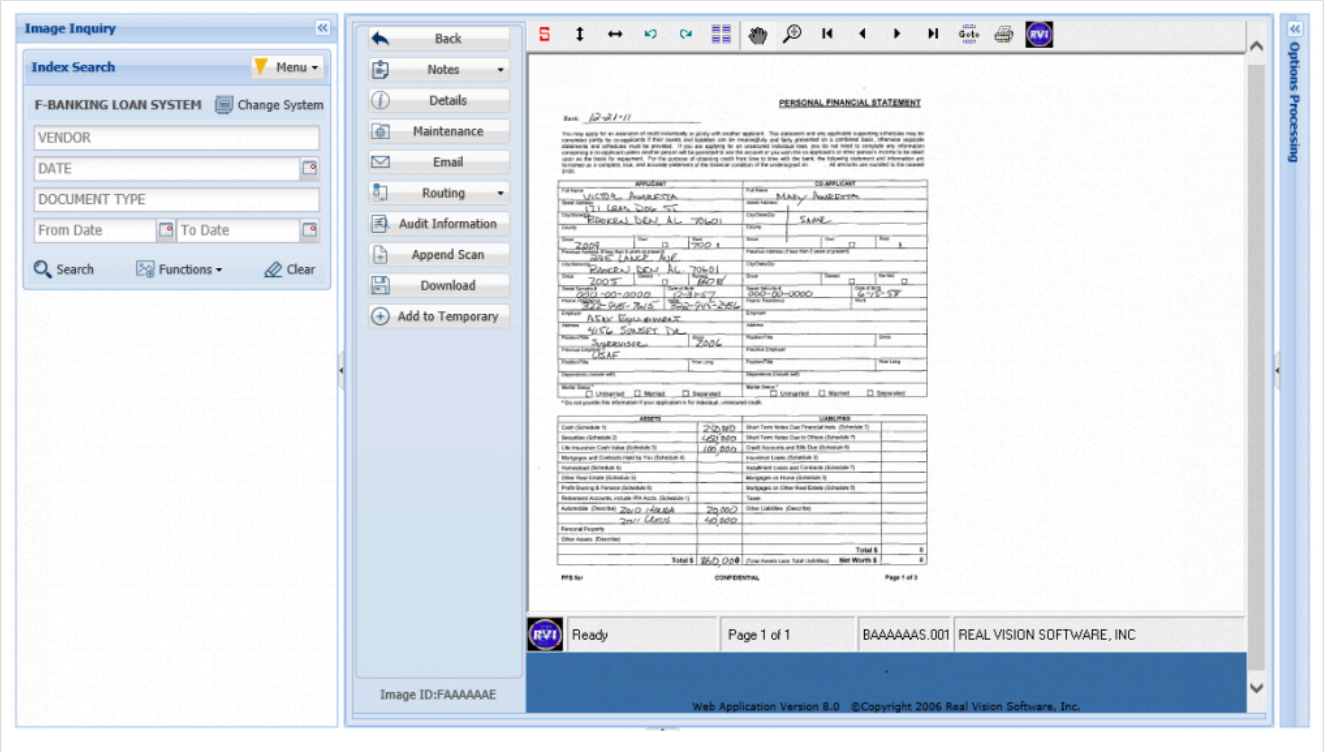


5. **Socket Support**
   Allows the user to turn the socket on/off when using IE. Chrome will always have socket control enabled so the user does not have the option to turn it off.
   (To save the user's selection, Cookies must be enabled.)

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.

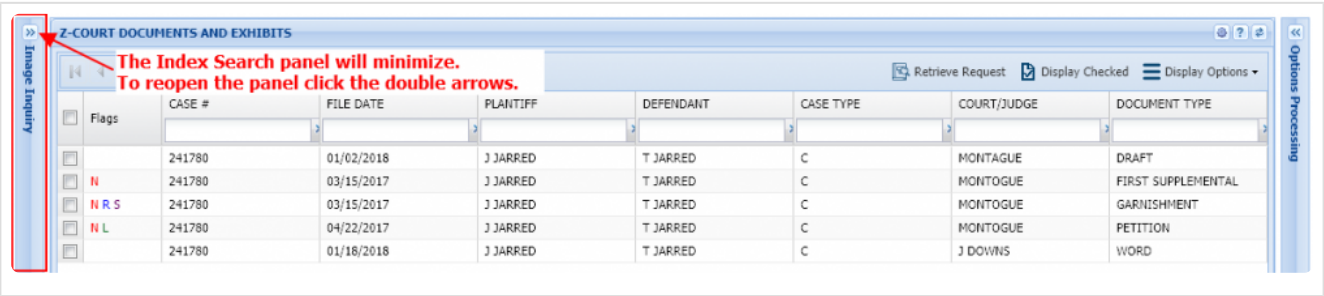
7. **RVI to Internet Viewer**
   Forces the display of images within the Internet Explorer frame within the One Look window.
   (RVIINET download must be setup.)



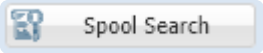
8. **Polling**
   Check/Uncheck this option to enable/disable the polling function from running. This only applies to users set to Type O or P as their Image Viewer configuration on the IBMi.

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

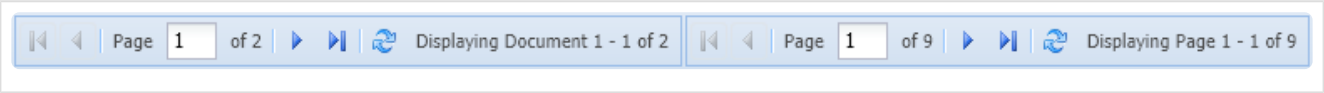
10. **Hide West Region after Search**
    After clicking the Search button in Image Inquiry, the Index Search pane will minimize leaving the list of results maximized across the screen.



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 

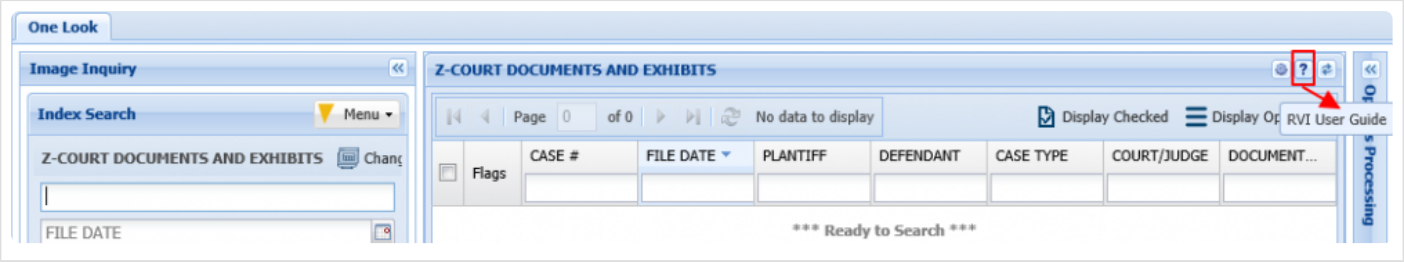
while Display AS400 Spool Format is enabled, the search will apply to ALL spool files that are queued up.



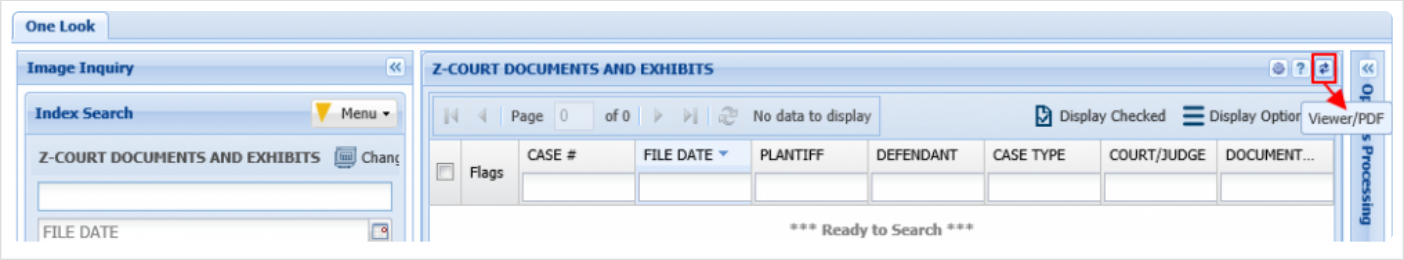
12. **Items Per Page**
    Lists up to the number of records set, before breaking the list into separate pages. The default value is 800.

13. **Temporary Grid and Show In Window initial window size**
    Sets the default size of the pop up window when viewing temporary grid 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.



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



7.2. Navigation & Appearance

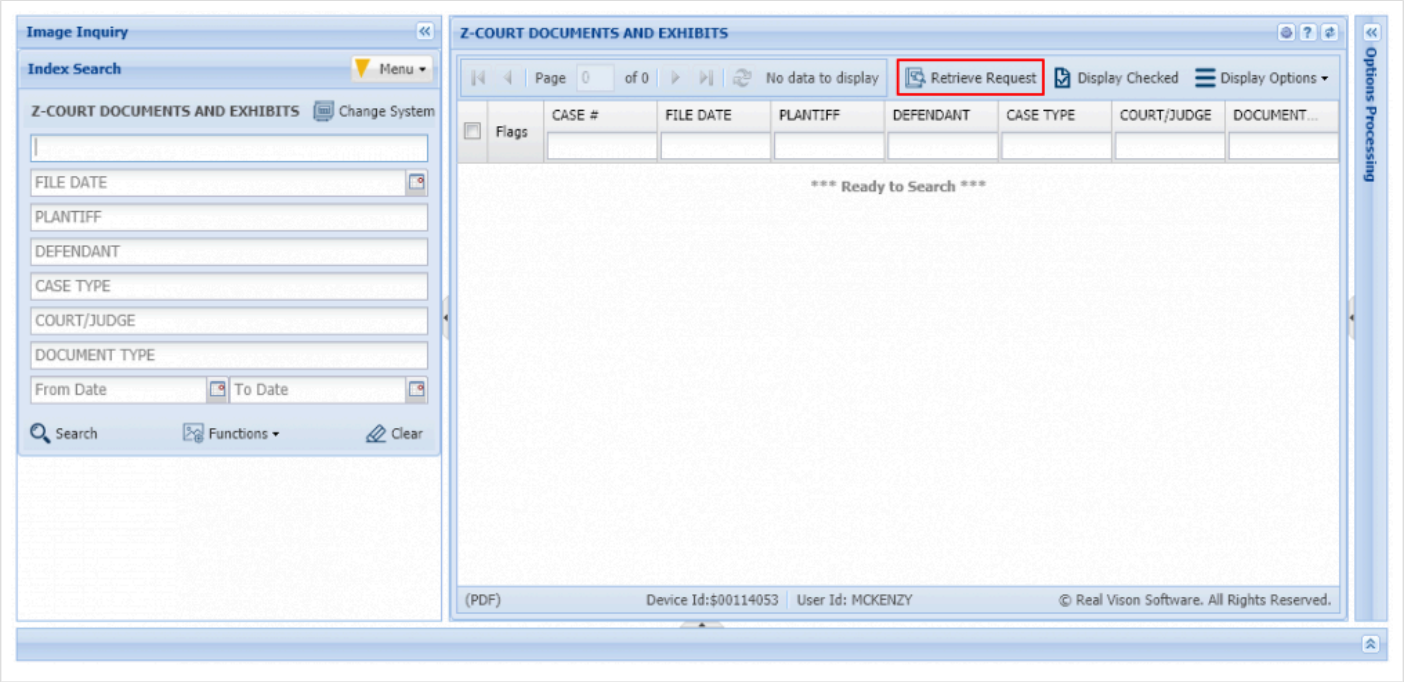
To watch a video on this topic CLICK HERE

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

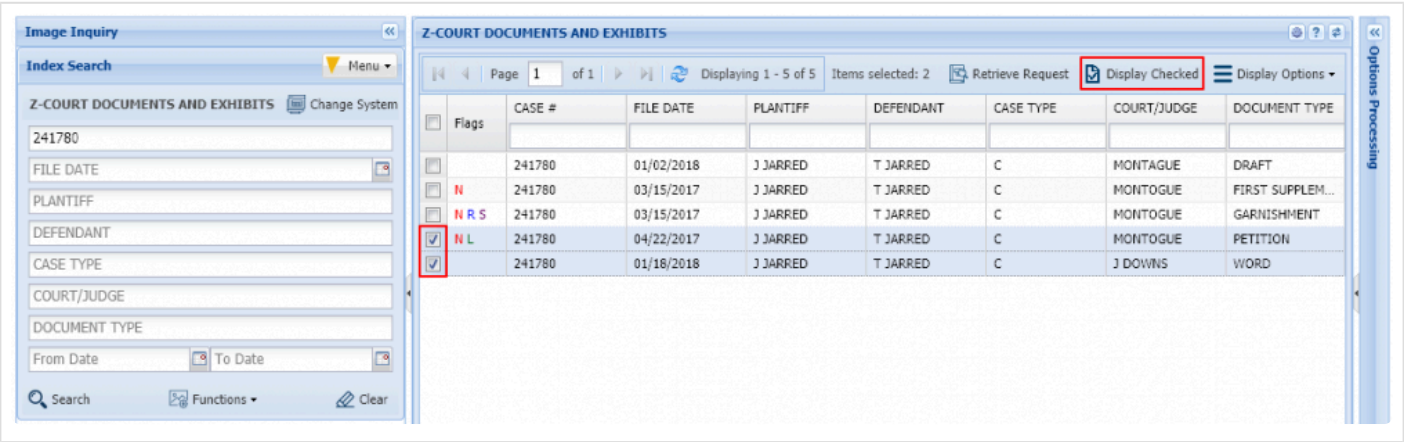
Retrieve Request: Manual information retrieval through a **CUSTOM INTERFACE** with the IBMi green screen used for One Look functions (View, Scan, Import, Upload) when polling or sockets is not used. Using the IBMi green screen, the user will navigate to and execute the **CUSTOM** function then press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

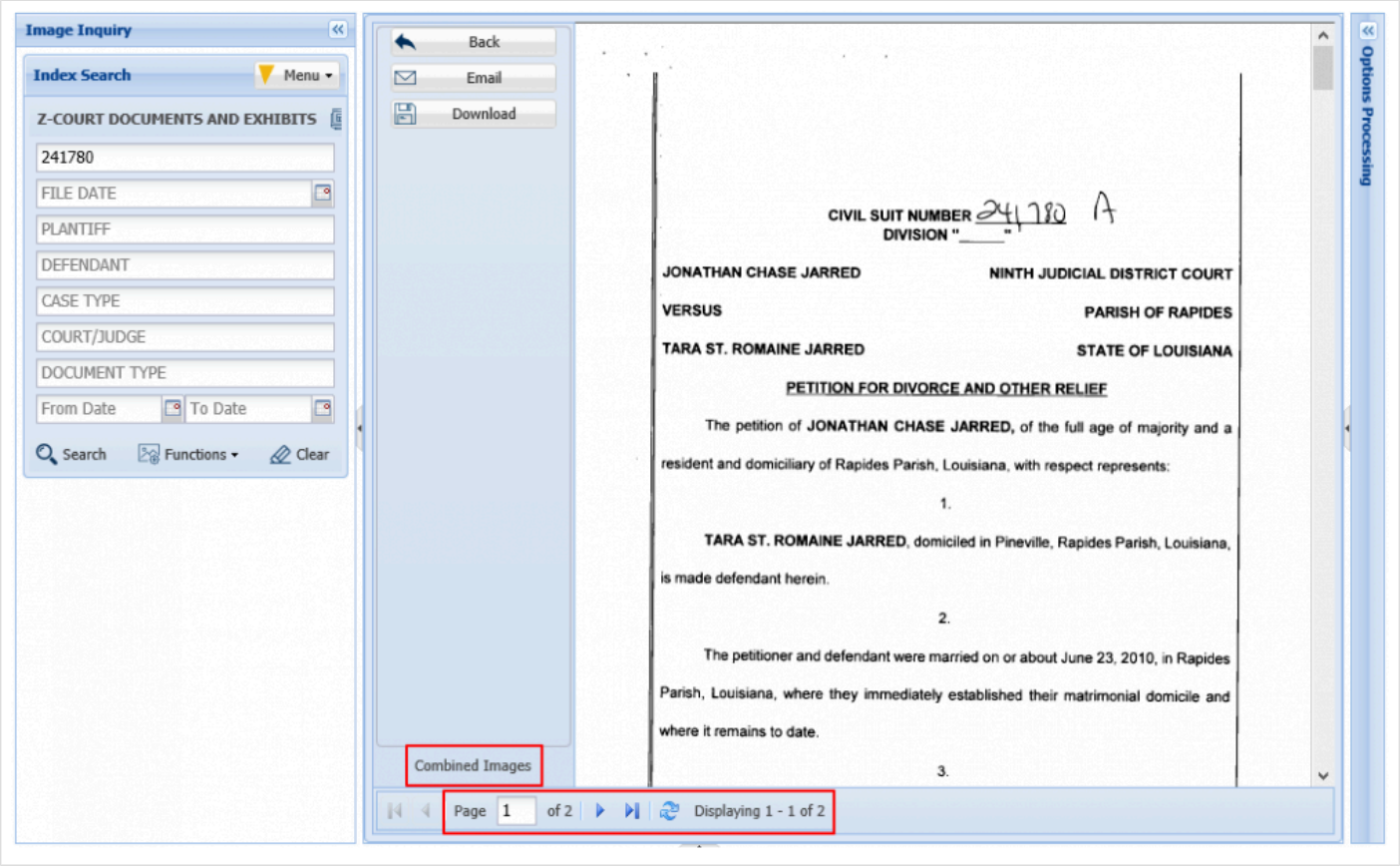


Display Checked: View all documents selected with a check mark.



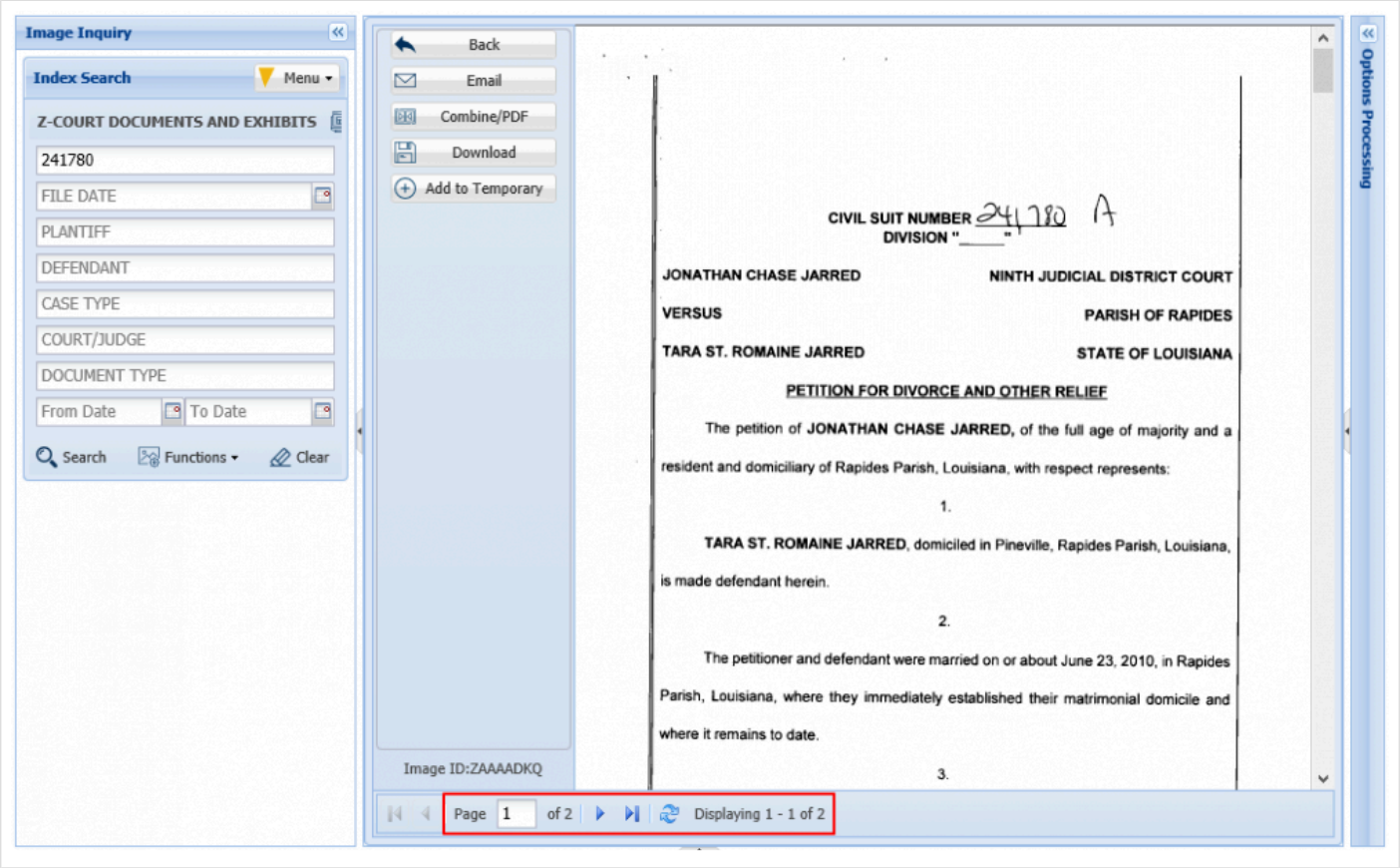
Under Settings , when Combine PDF is Enabled – Use the scroll bar to move between TIF and JPG documents. Use the arrows to move between OEM documents.

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

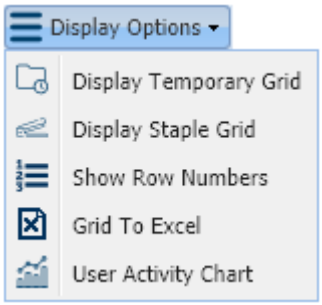


Under Settings , when Combine PDF is Disabled – Use arrows to move to the next document.

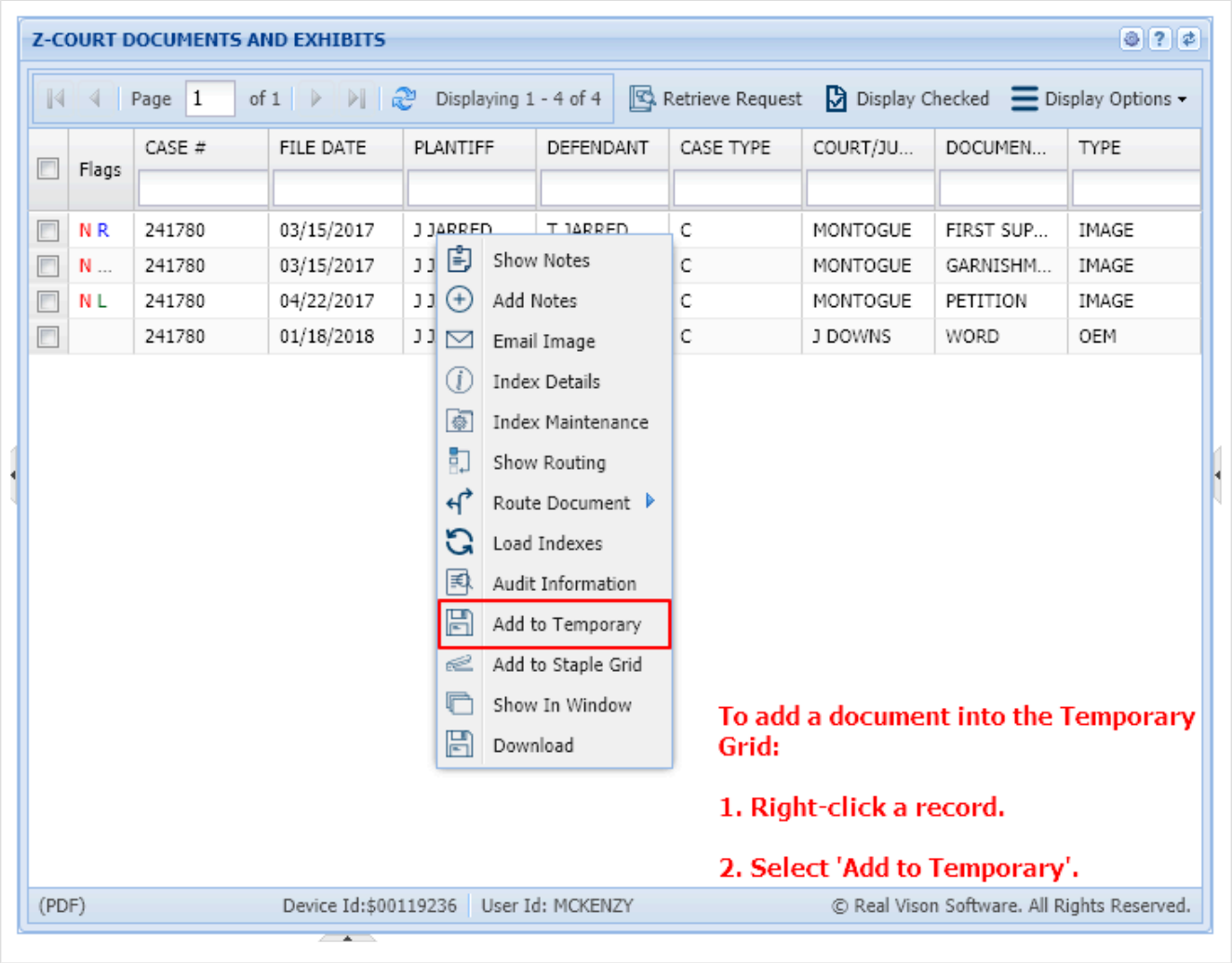
When Combine PDF is disabled, the Combine/PDF button will be active.

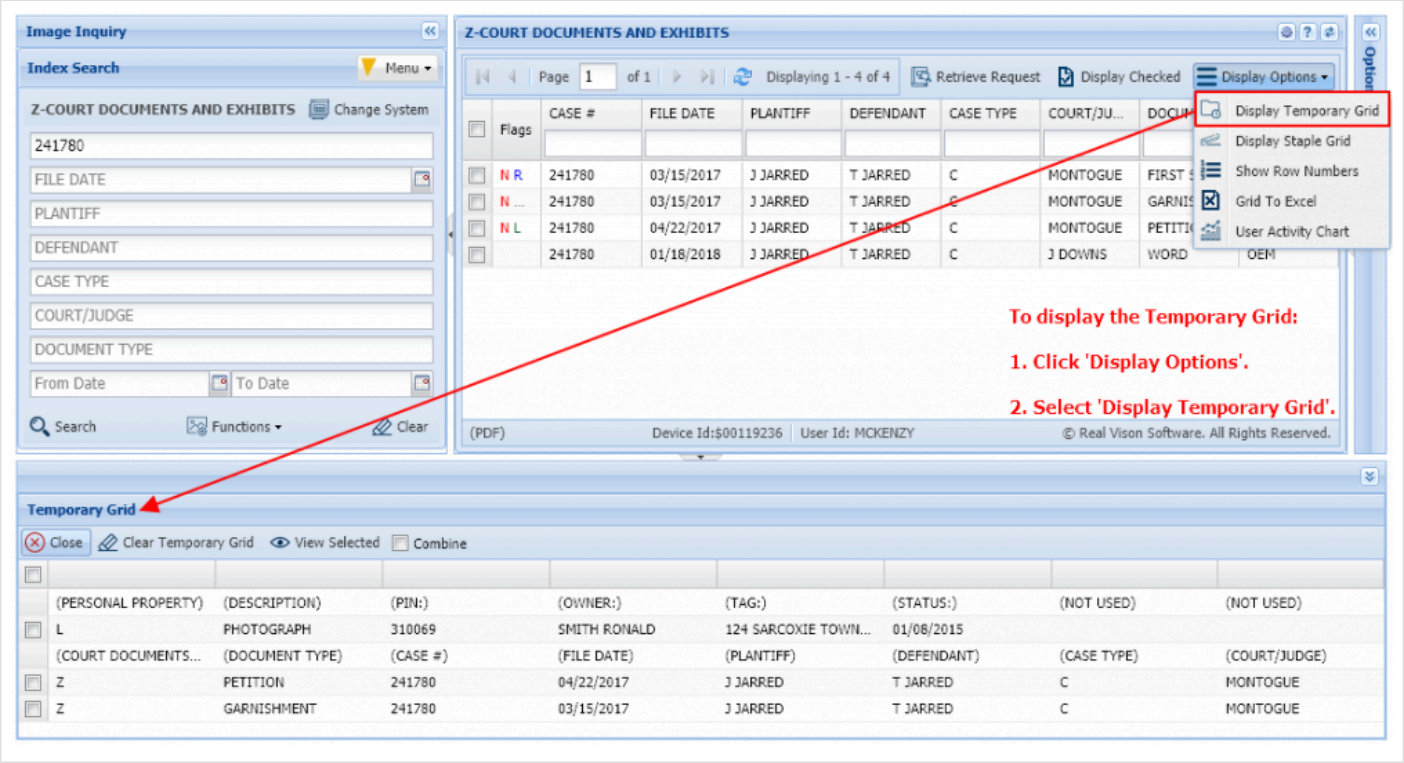


Display Options

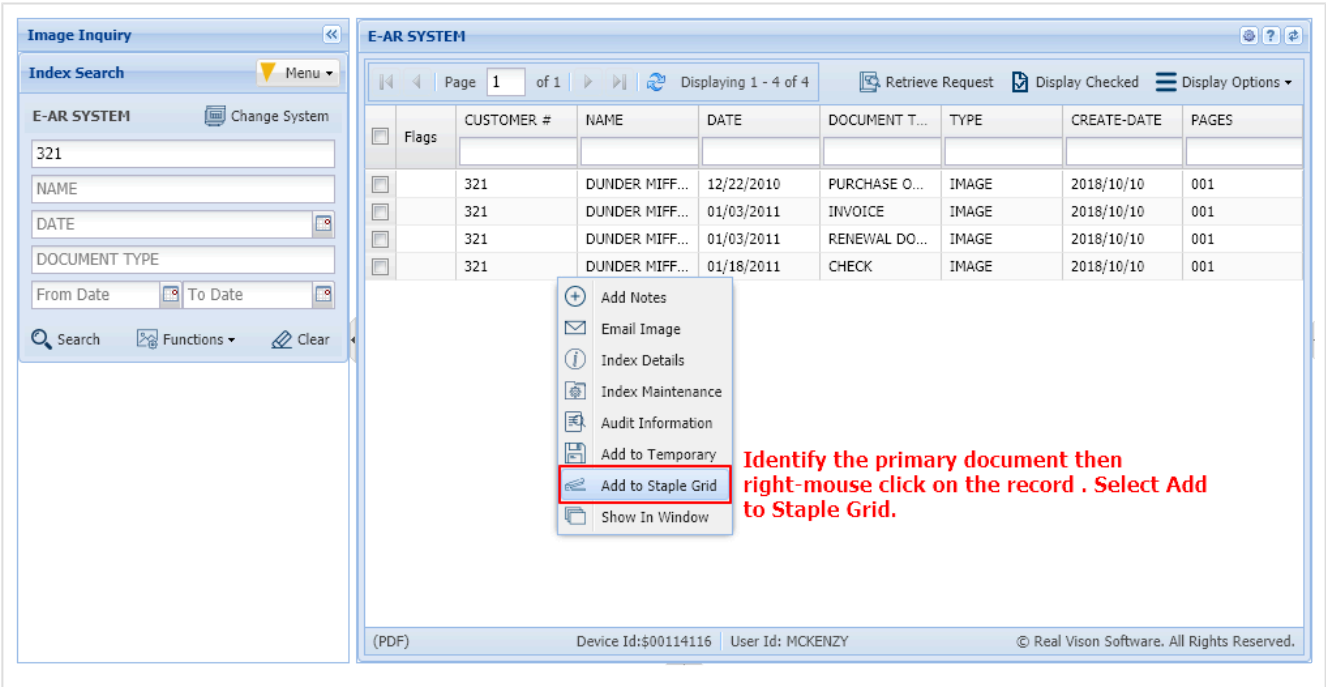


- **Display Temporary Grid:** Populates a grid at the bottom of the screen showing a list of documents that have been added to the temporary holding area. From the holding area, users can view documents which allows for comparison of documents across different systems. (*The temporary grid is cleared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

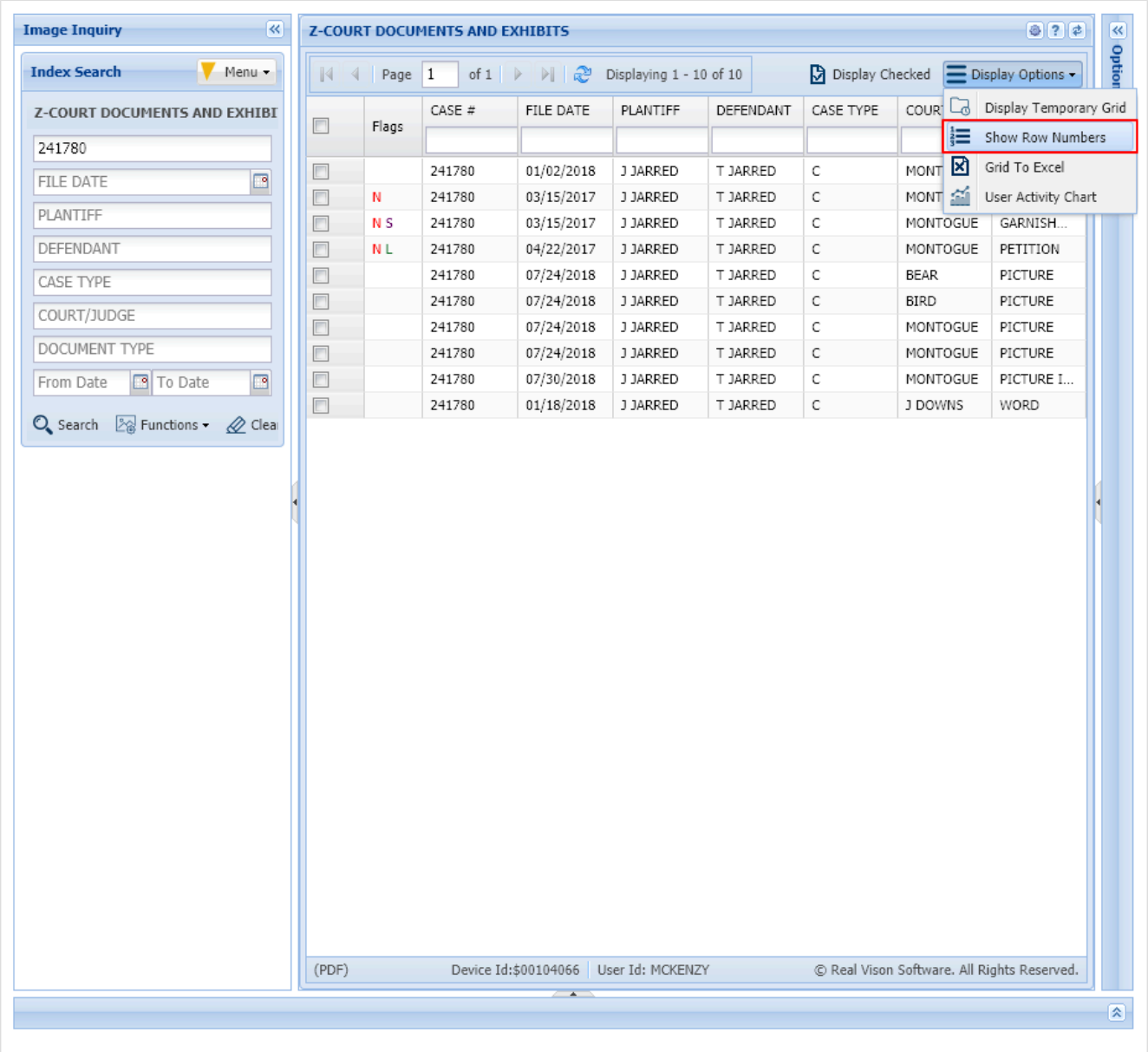

Z-COURT DOCUMENTS AND EXHIBITS
Page 1 of 1
Displaying 1 - 4 of 4
Retrieve Request
Display Checked
Display Options
Flags
CASE #
FILE DATE
PLANTIFF
DEFENDANT
CASE TYPE
COURT/JU...
DOCUMEN...
TYPE
N R 241780 03/15/2017 J JARRED T JARRED C MONTOGUE FIRST SUP... IMAGE
N ... 241780 03/15/2017 J J C MONTOGUE GARNISHM... IMAGE
N L 241780 04/22/2017 J J C MONTOGUE PETITION IMAGE
241780 01/18/2018 J J C J DOWNS WORD OEM
Show Notes
Add Notes
Email Image
Index Details
Index Maintenance
Show Routing
Route Document
Load Indexes
Audit Information
Add to Temporary
Add to Staple Grid
Show In Window
Download
To add a document into the Temporary Grid:
1. Right-click a record.
2. Select 'Add to Temporary'.
(PDF)
Device Id:$00119236
User Id: MCKENZY
© Real Vison Software. All Rights Reserved.



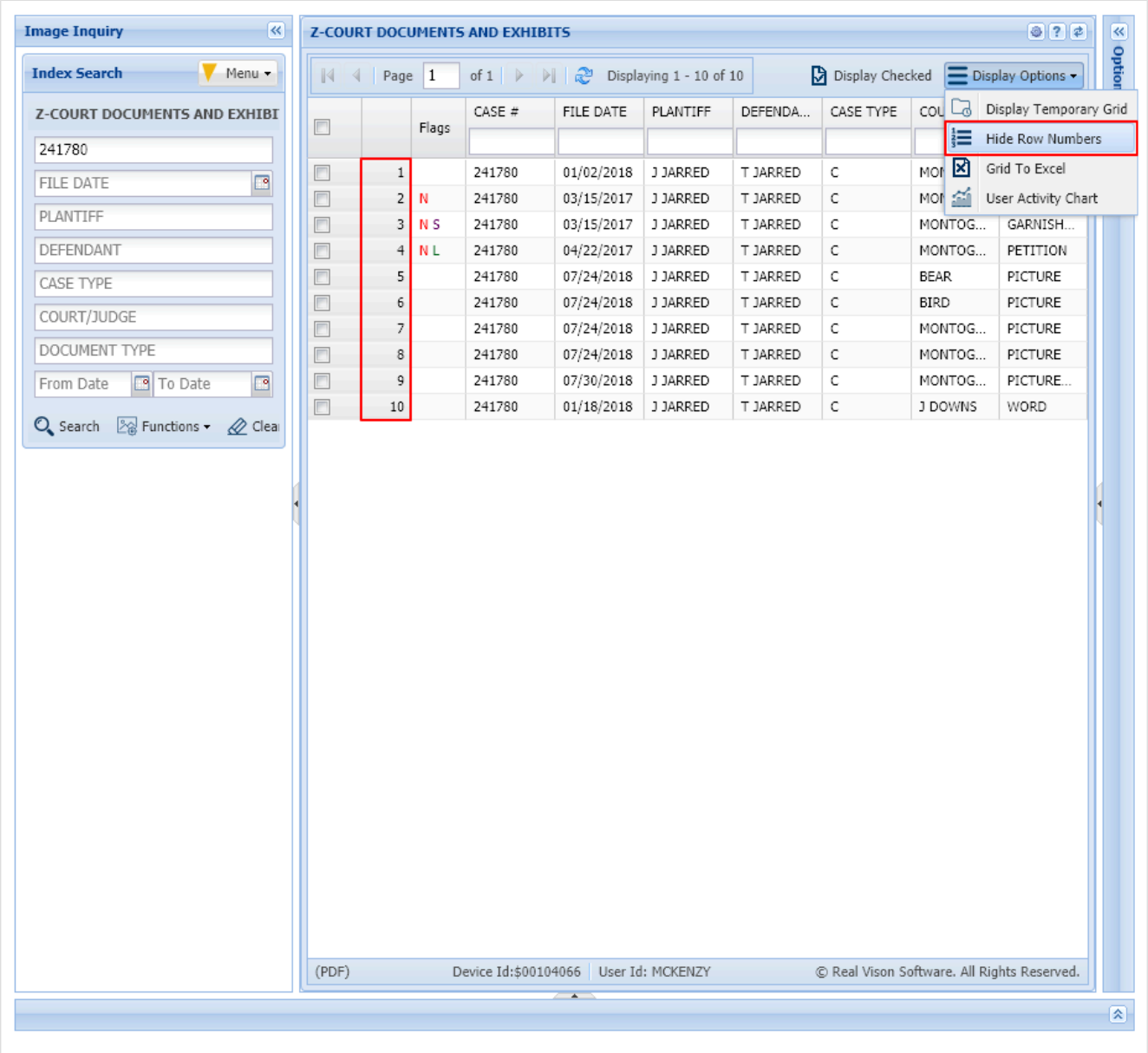
- **Display Staple Grid:** Displays the Staple Grid allowing the user to see the items waiting to be stapled and to finalize the staple process as well as maintain existing staple bundles.
  (*The staple grid is cleared automatically when the user logs off.*)



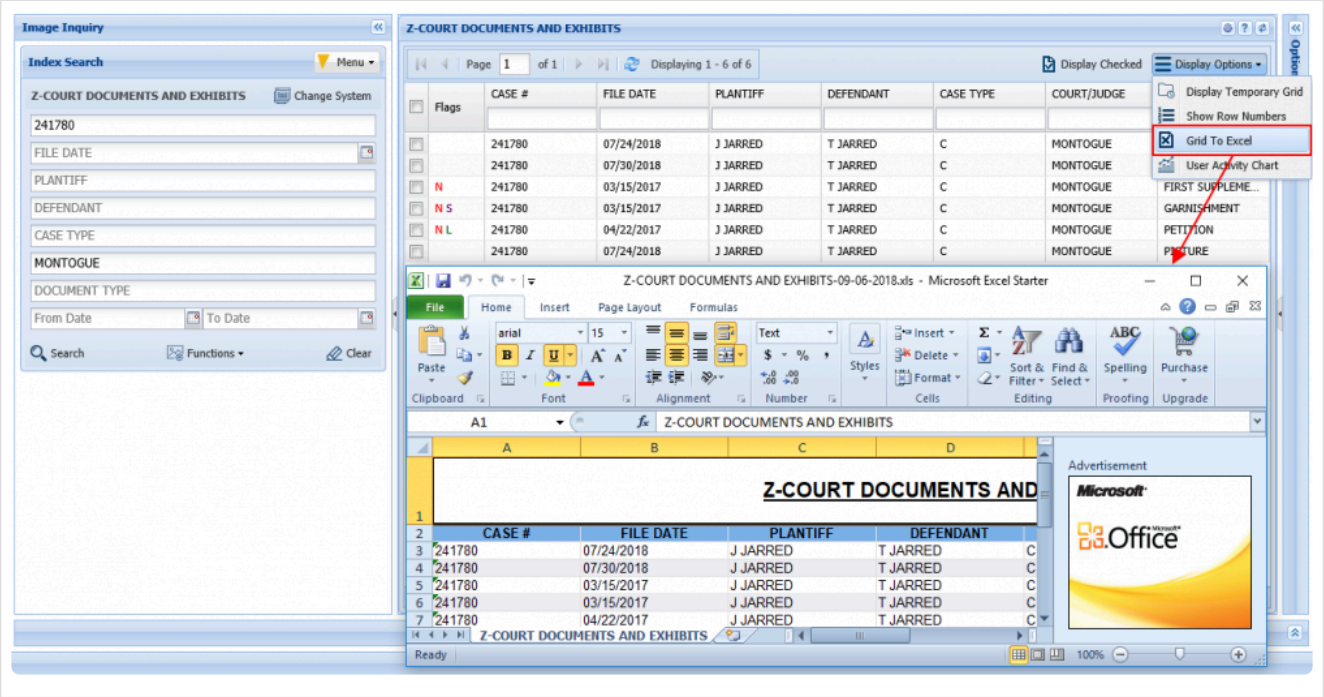
- **Show Row:** Displays the numerical row number next to each record.



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

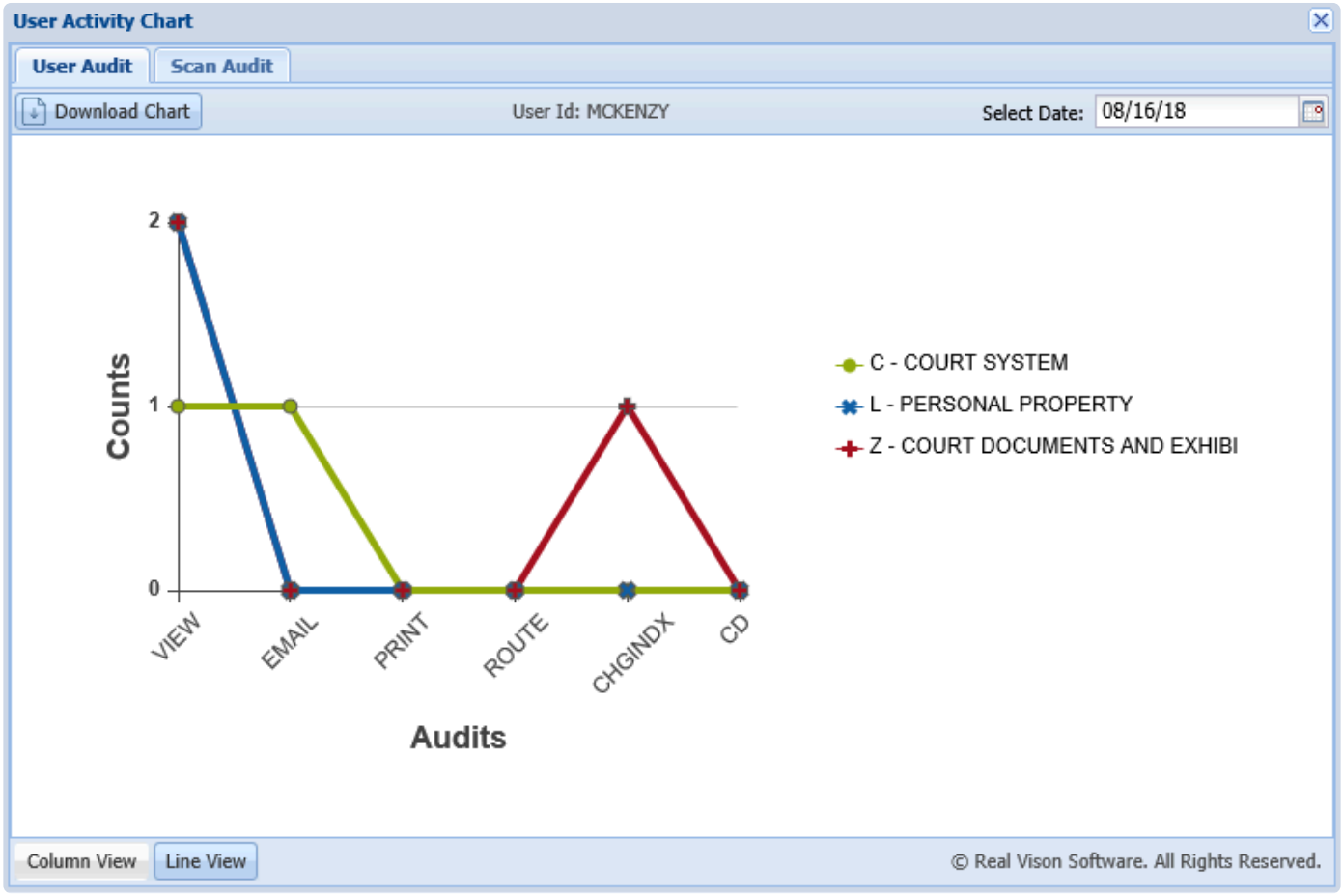


- **Grid to Excel:** Display a list of the One Look sub file indexes in Excel. Also, used in spool file search to display spool file reports in Excel.

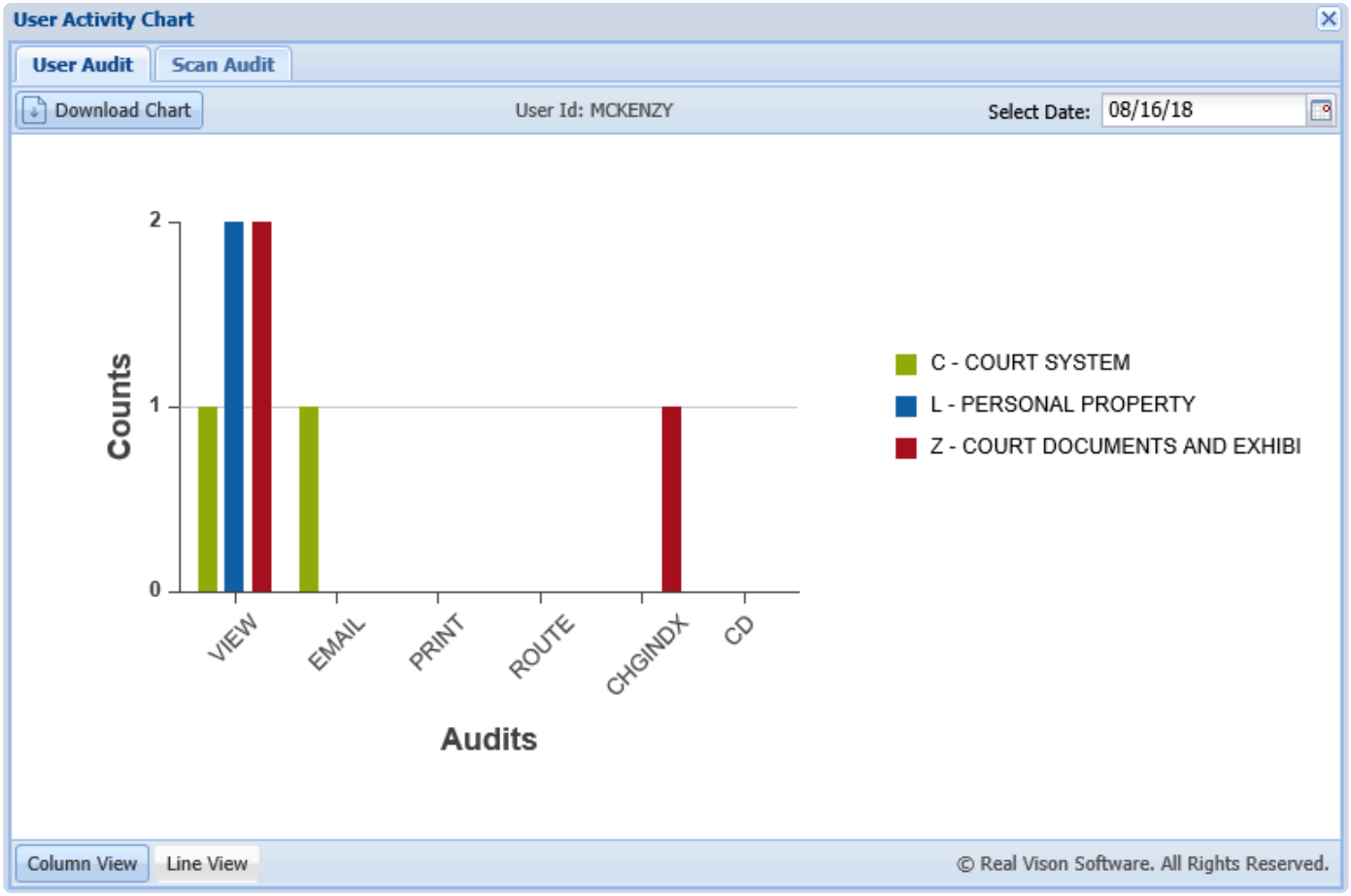


- **User Activity Chart:** Includes **User Audit** and **Scan Audit** tabs. The User Audit is a graphical representation of the user's activity by System Code including View, Email, Print, Route, Change Index, and CD activity based on the selected date. The Scan Audit is a graphical representation of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

User Audit Tab:


User Activity Chart
User Audit
Scan Audit
Download Chart
User Id: MCKENZY
Select Date: 08/16/18
Counts
2
1
0
VIEW
EMAIL
PRINT
ROUTE
CHGINDX
CD
Audits
C - COURT SYSTEM
L - PERSONAL PROPERTY
Z - COURT DOCUMENTS AND EXHIBI
Column View
Line View
© Real Vison Software. All Rights Reserved.

Line View

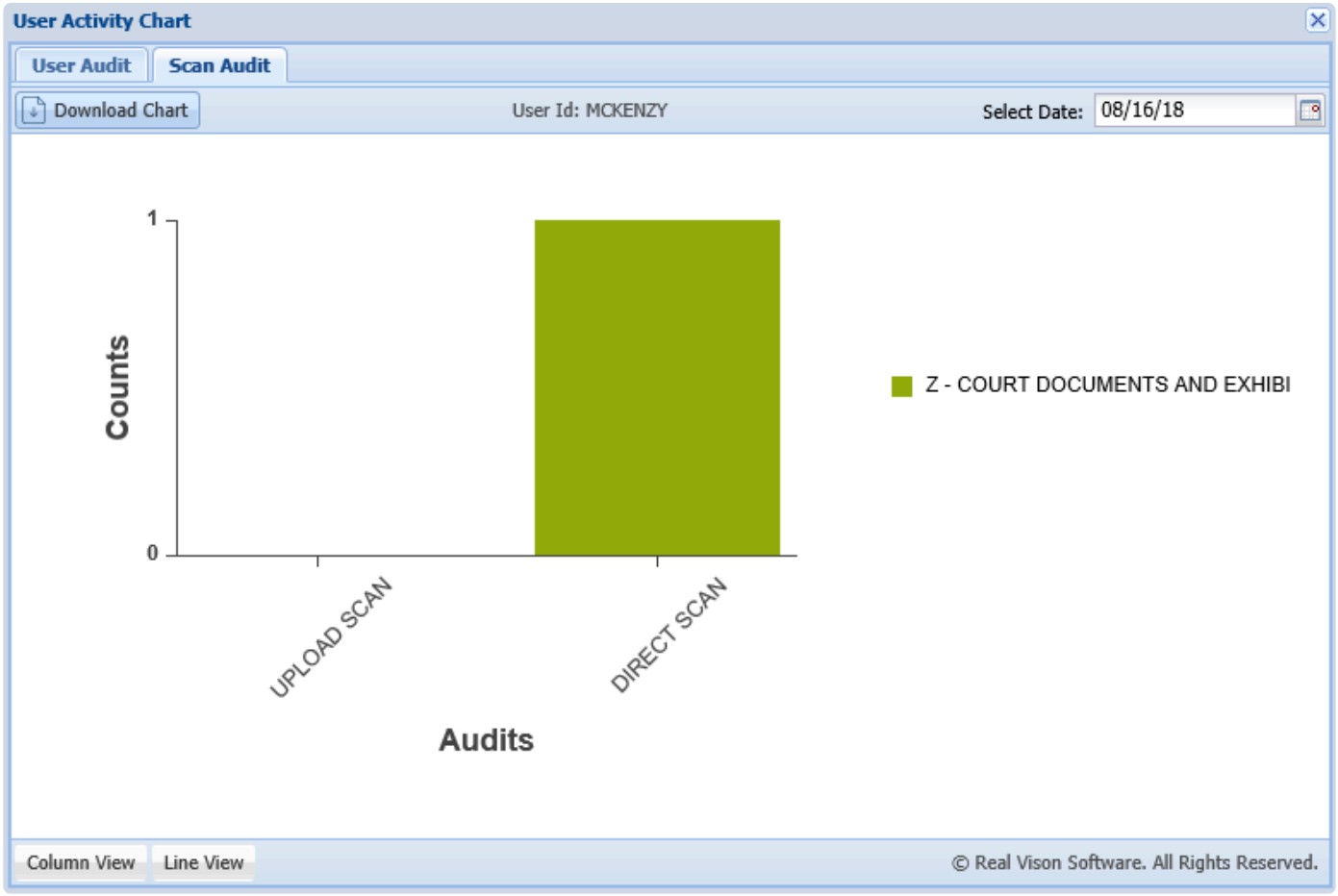


Column View

Scan Audit Tab:

User Activity Chart
User Audit
Scan Audit
Download Chart
User Id: MCKENZY
Select Date:
08/16/18
1
0
Counts
UPLOAD SCAN
DIRECT SCAN
Audits
Z - COURT DOCUMENTS AND EXHIBI
Column View
Line View
© Real Vison Software. All Rights Reserved.

Line View

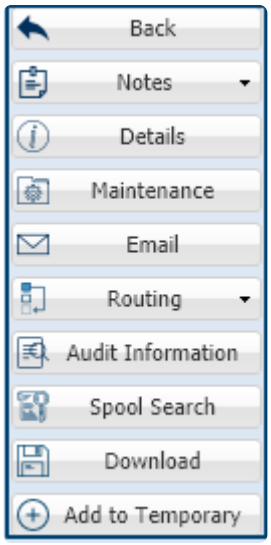


Column View

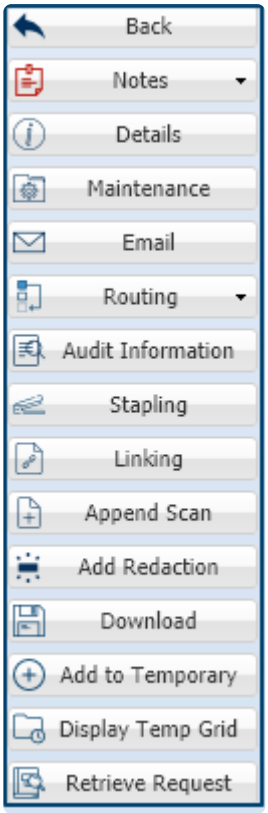
7.3. Display Options Ribbon

(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.



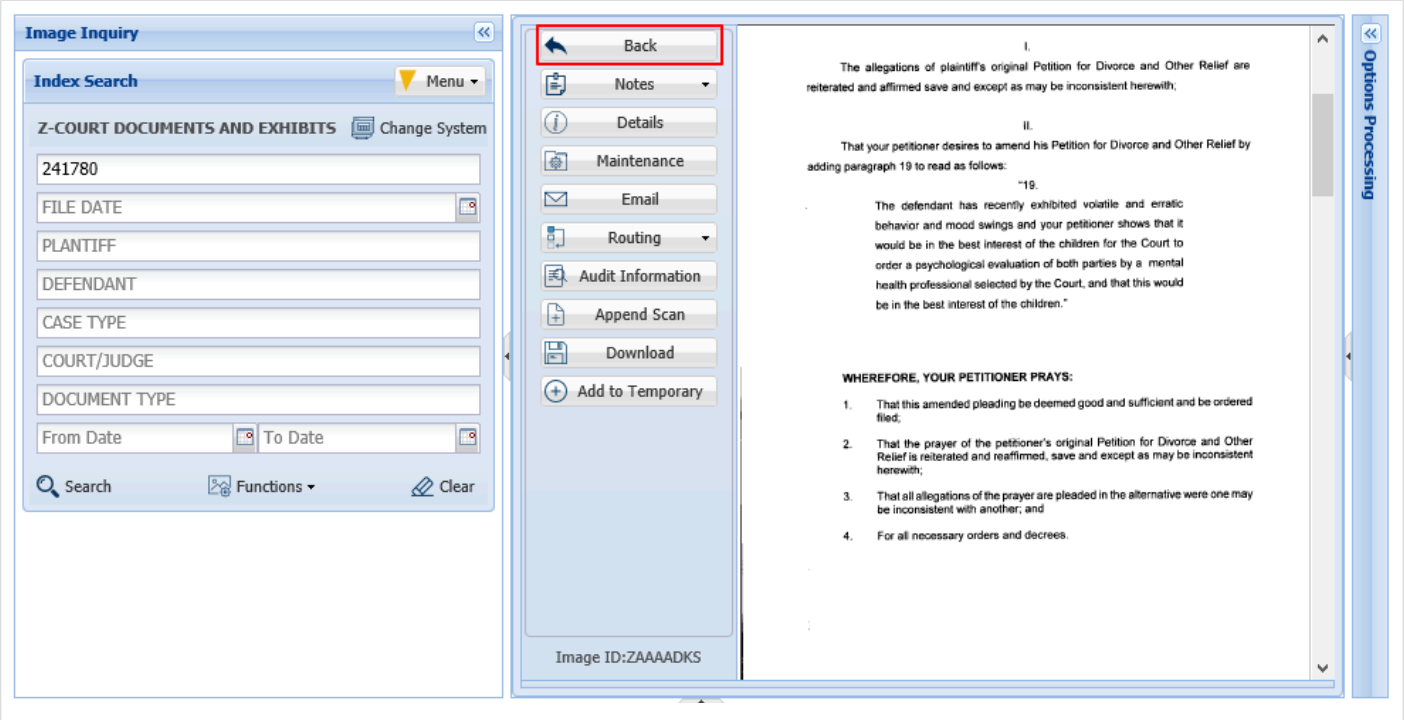
The Spool Search button is only available when displaying spool files.



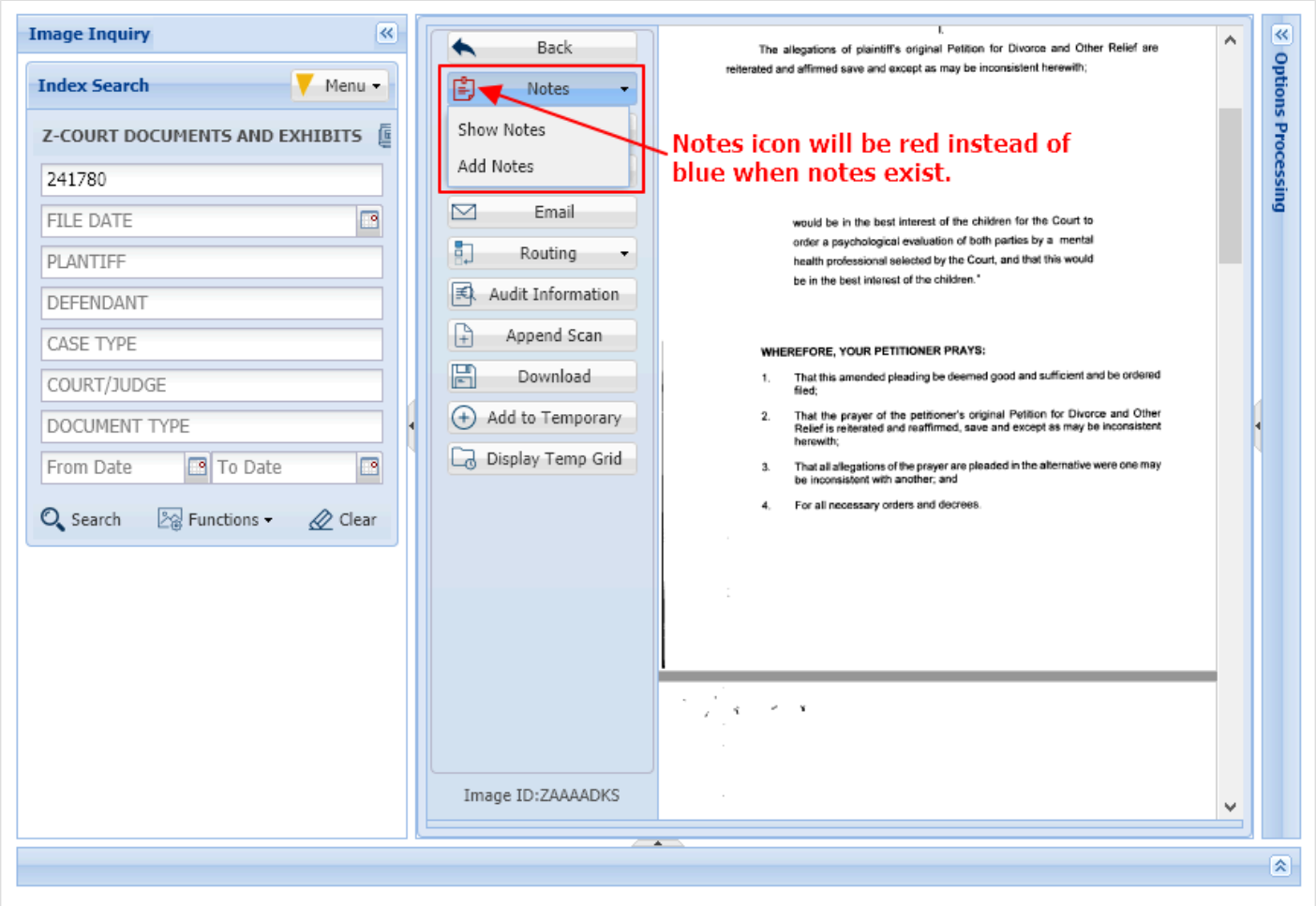
The Append Scan button is only available when displaying scanned images.

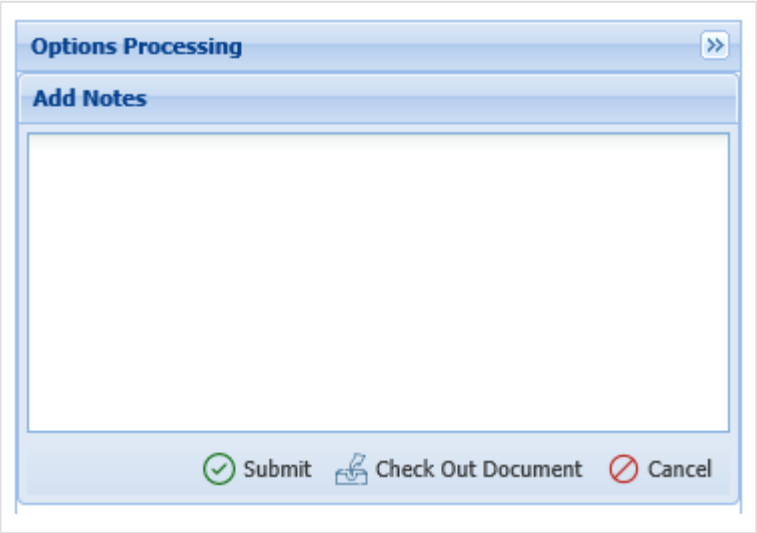
The Stapling and Linking buttons will only appear when the document in the window has been stapled or linked to other documents.

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.



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.*)



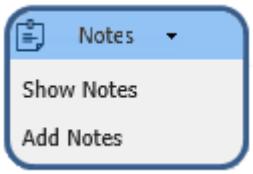


When adding notes, the record can be ‘checked out’ to ensure no conflicts occur between multiple users attempting to add notes to the same document.

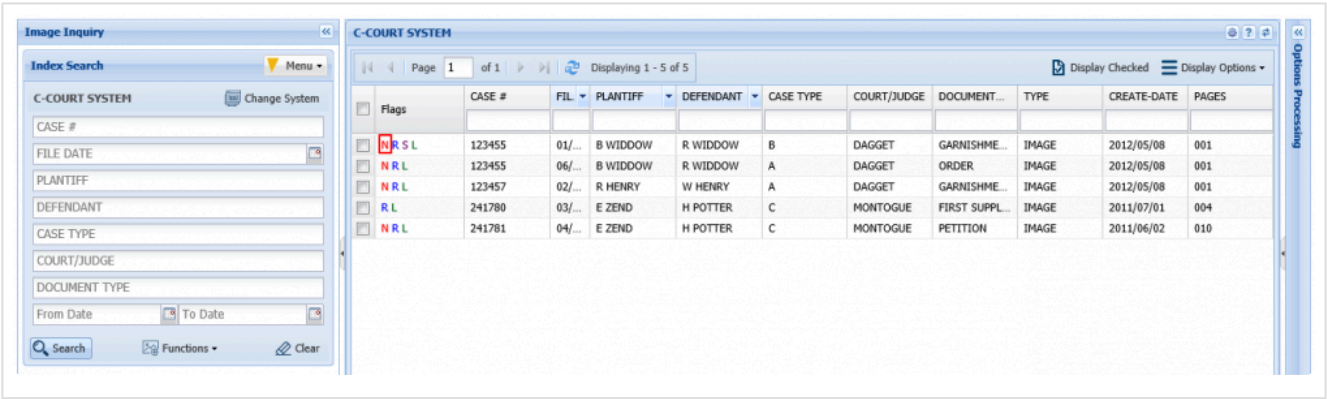
Once the note is complete, select

Once a Note is Added:

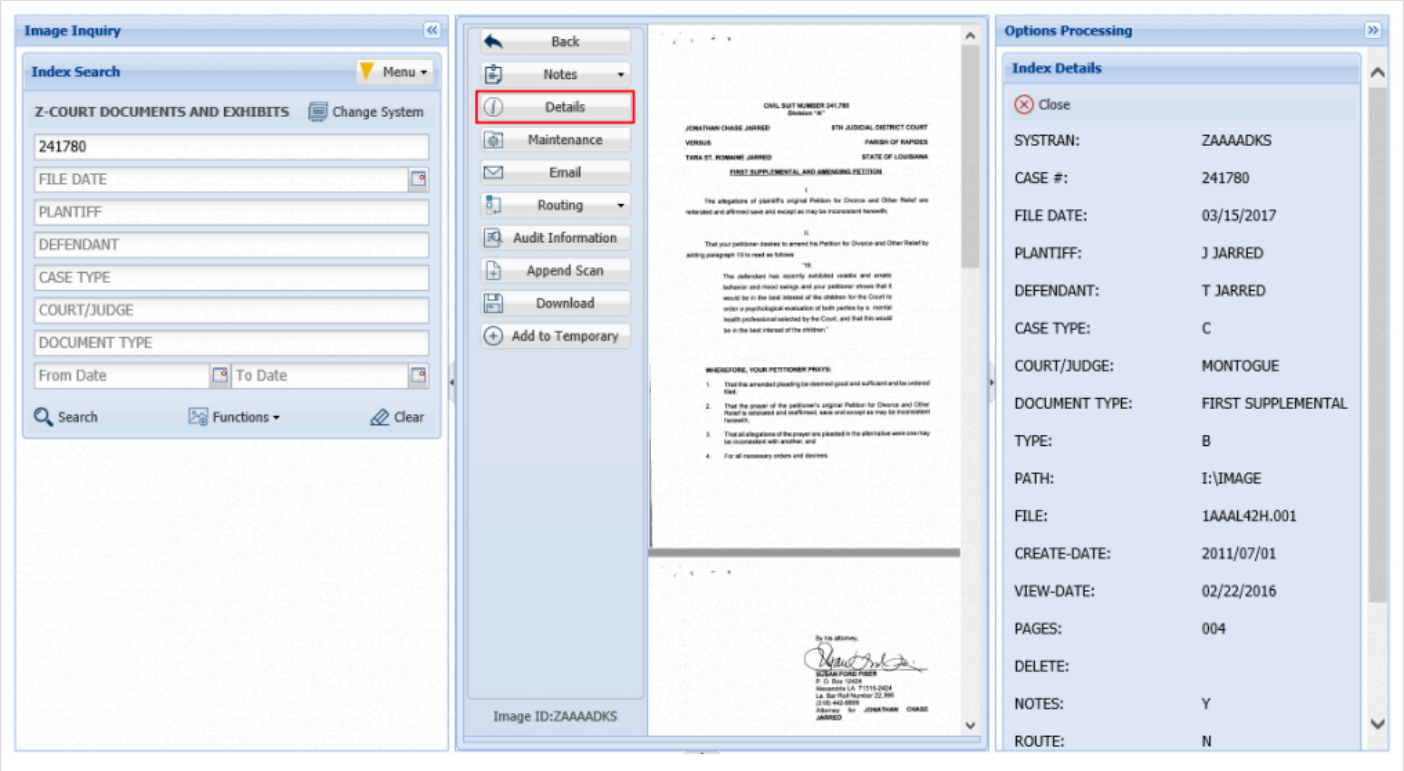
- The option to **Show Notes** will be available.



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

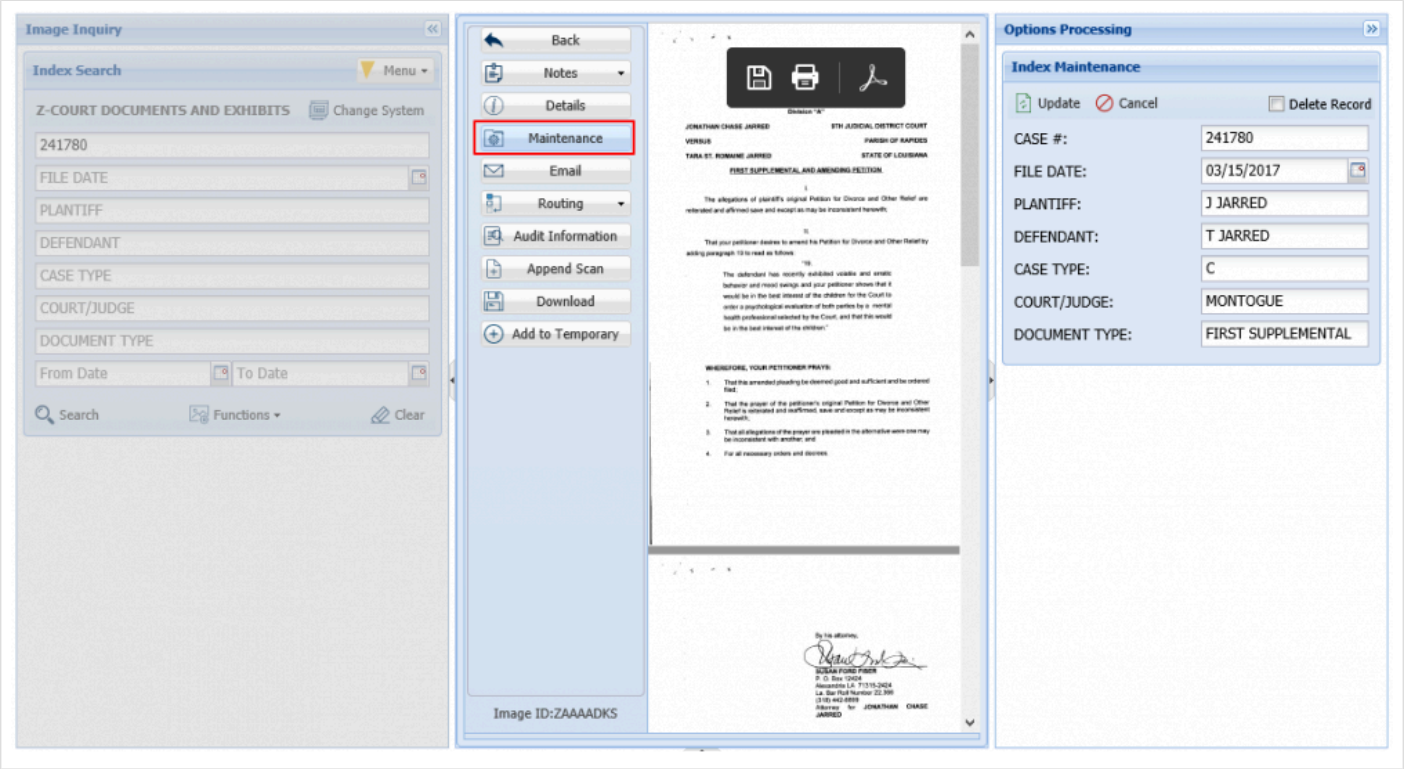


Details: Shows the details (*filename, path, page count, create date*) of the document being displayed.

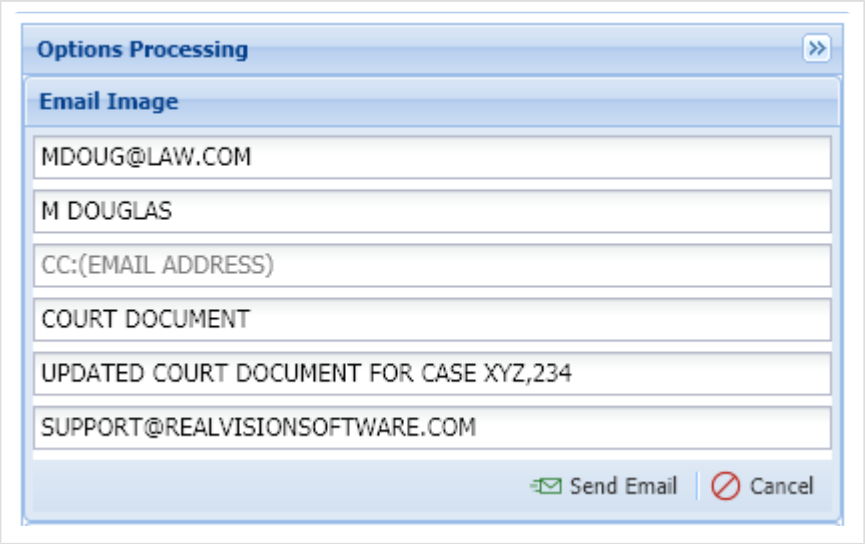


This information is helpful for troubleshooting. Use this information to identify the filename and location of the file when reporting problems to RVI Support.

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

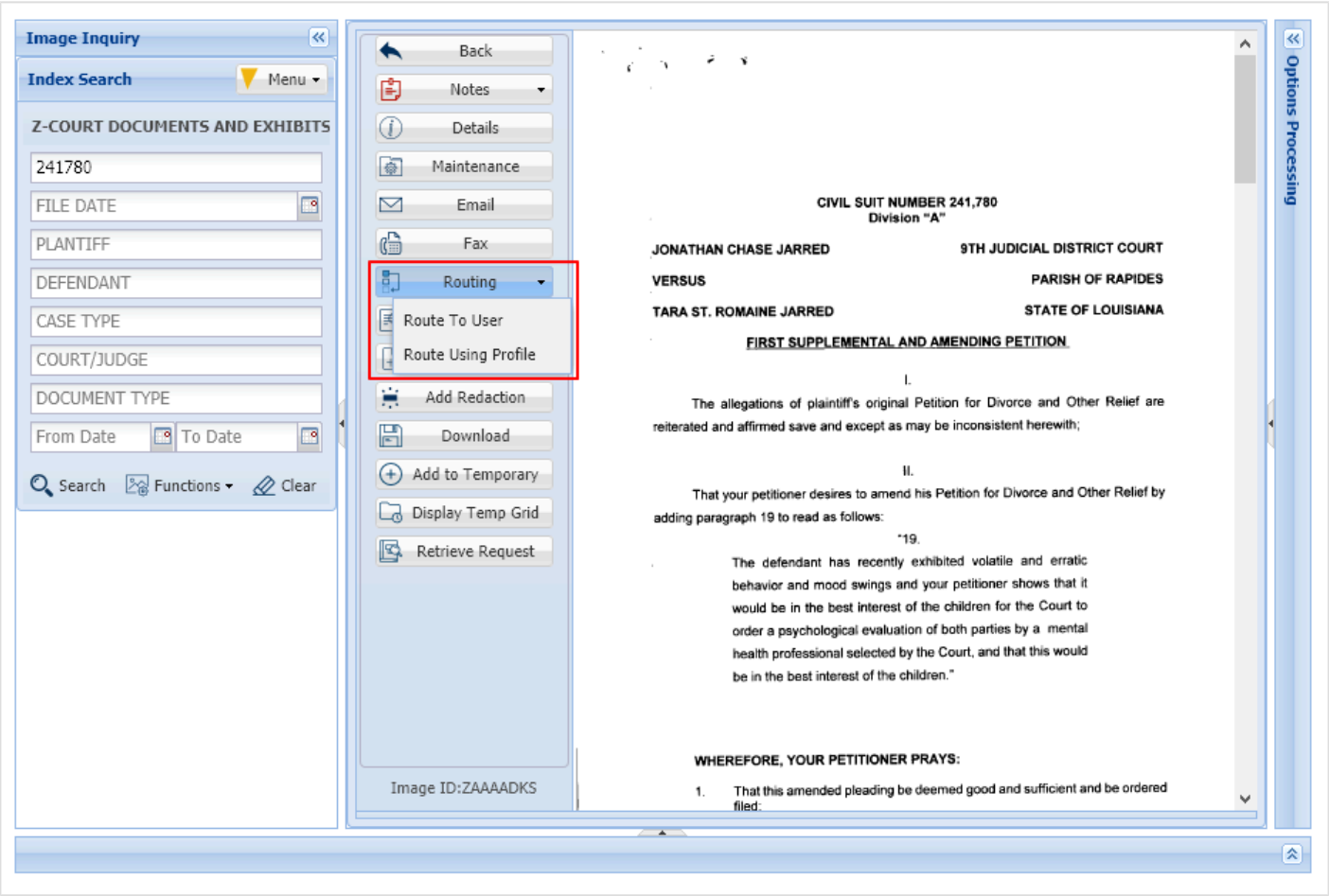


Email: Provides an email dialog box with the image automatically attached. An email contact list will appear with those email addresses that have been setup on the server.



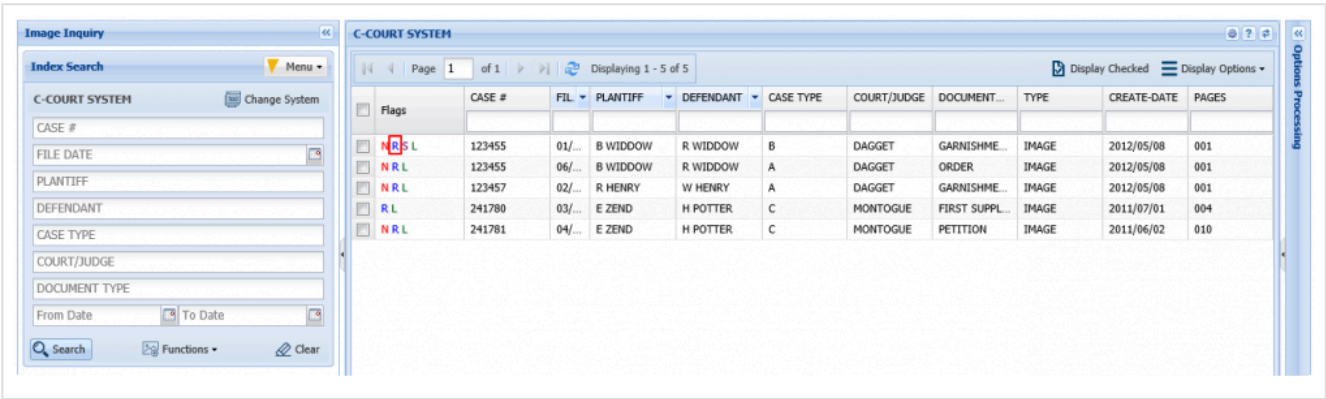
The **IBMi Email Server** must be running on the IBM i server.

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.*)

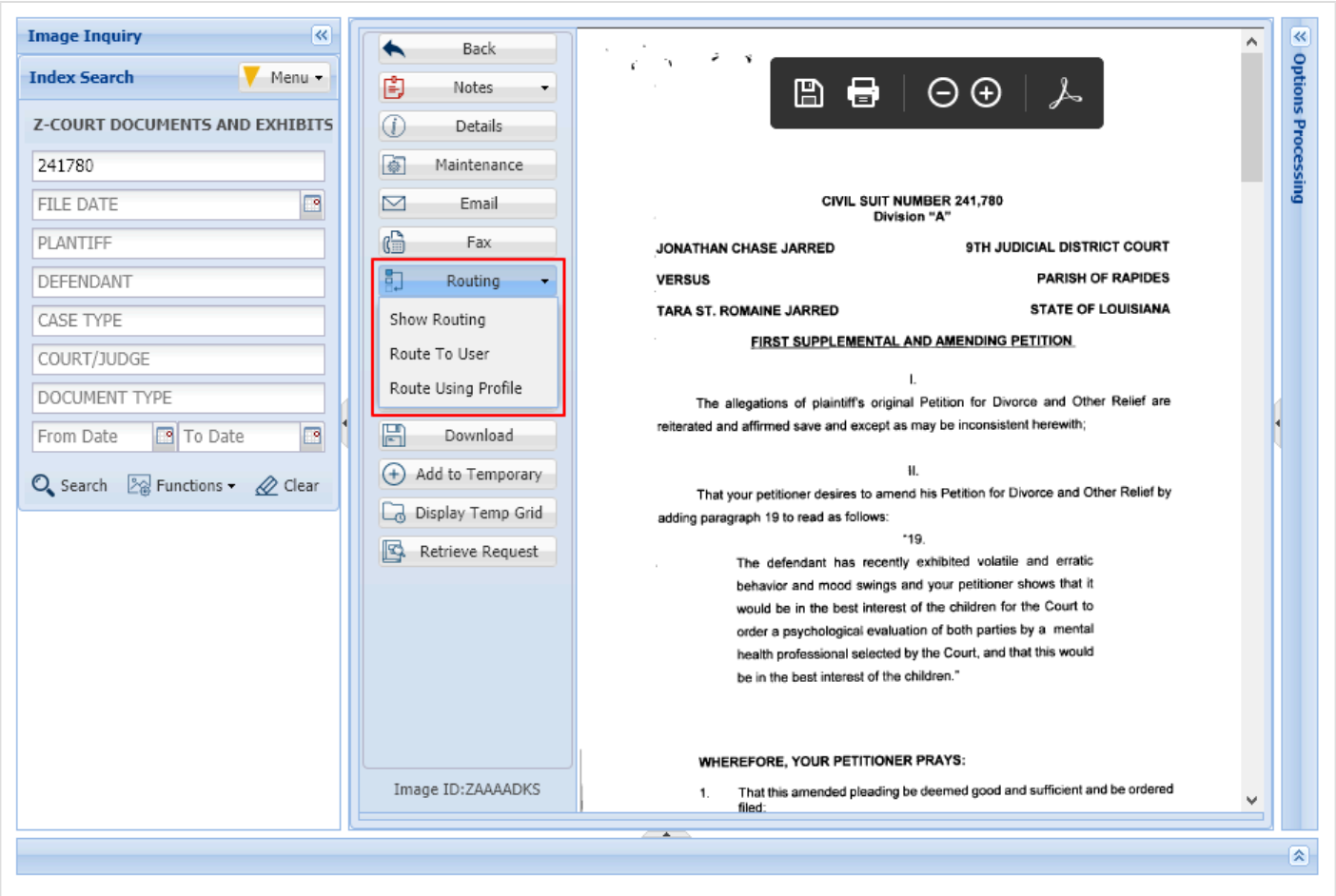


Once a document is Routed:

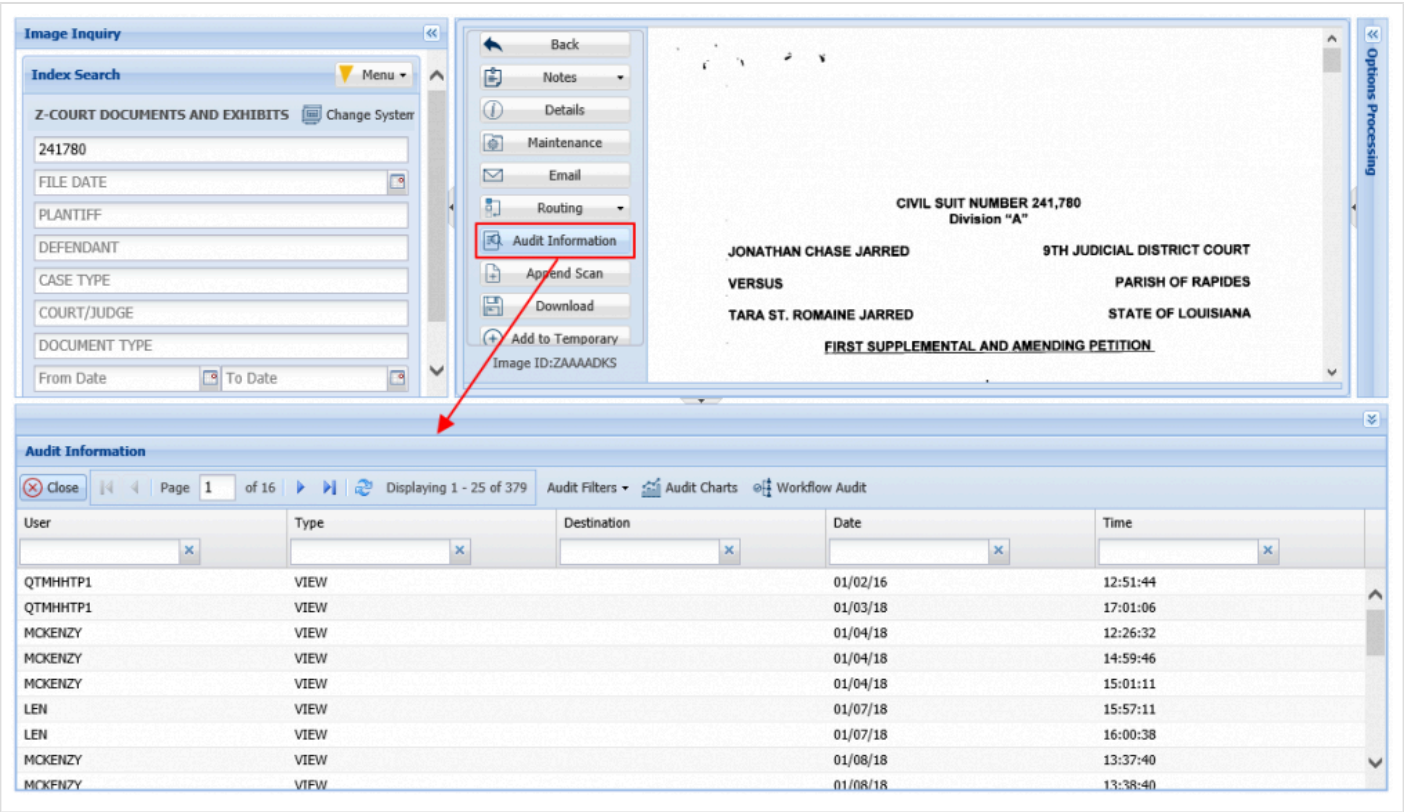
- The system will display 'R' next to the record.



After the document is routed, the option Show Routing will appear under the Routing drop down list.



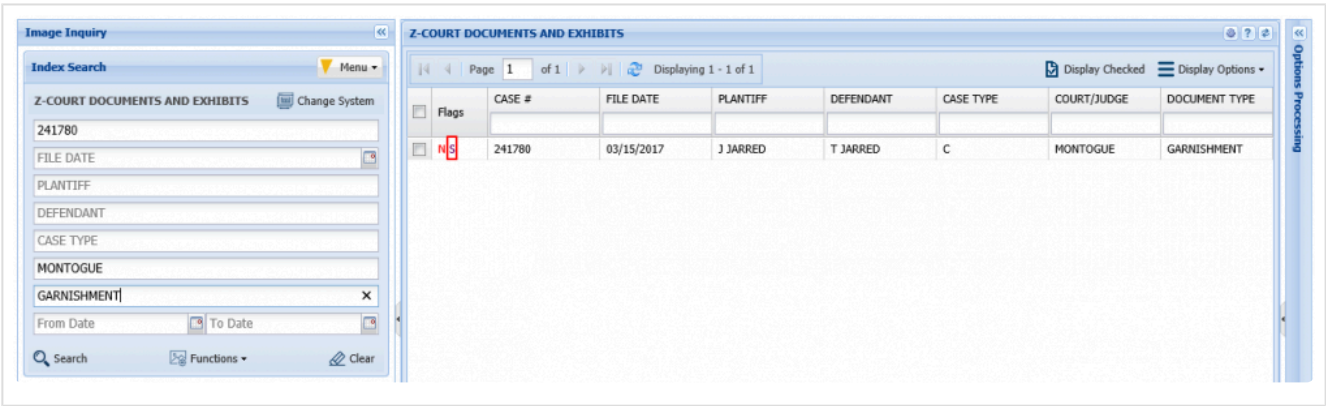
Audit Information: Provides the ability to view all activity for the document being viewed.
Available filters: View, Print, Email, Change, Route, Fax, CD, Signature



Stapling: Allows for the automatic grouping of images into a bundle. 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. (*The staple profile is setup by your system administrator.*)

<u>If the primary document is stapled to another image:</u>

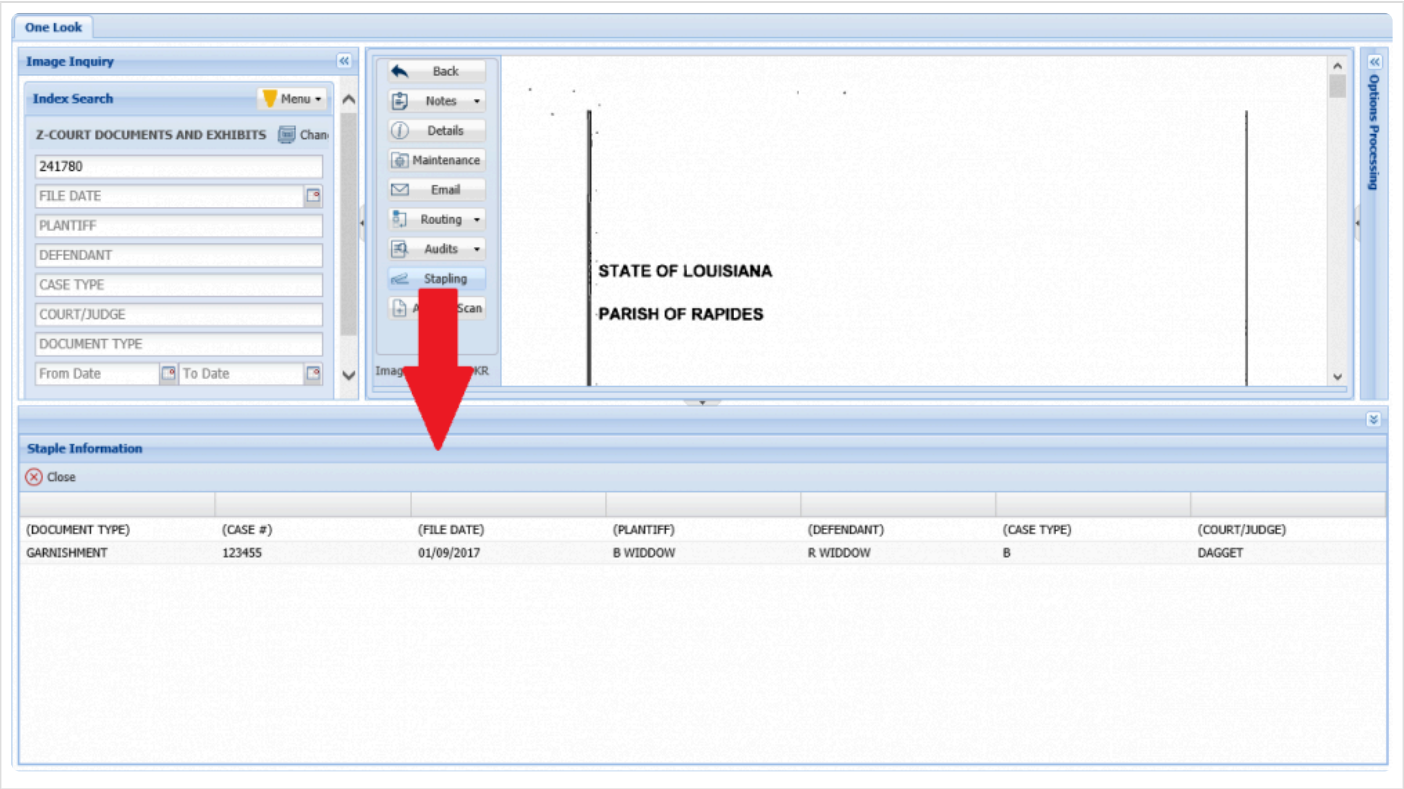
- The system will display 'S' next to the record.



- The button

will be available.

- 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.

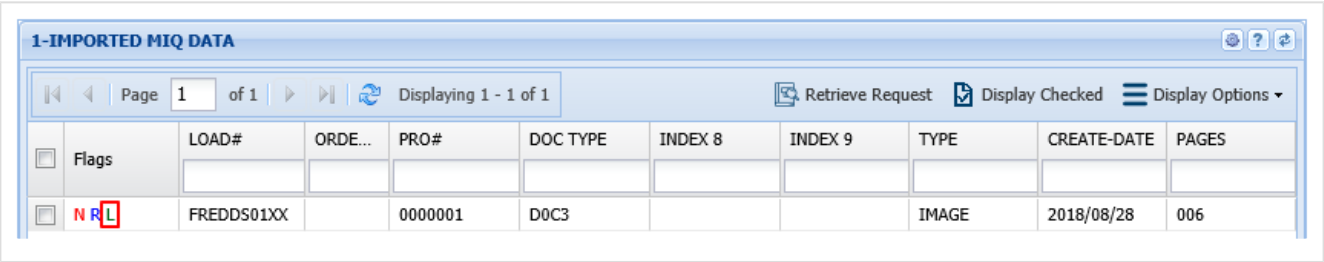


Linking: Provides the ability to establish a primary document with a link to other documents in different RVI imaging systems. This option assumes that if the user has security to the HR system that they also have security setup for the employee payroll system. (*The linking profile is setup by your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

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

<u>If the document's indexes satisfy a linking rule that is setup for this image system:</u>

- The system will display L next to the record.

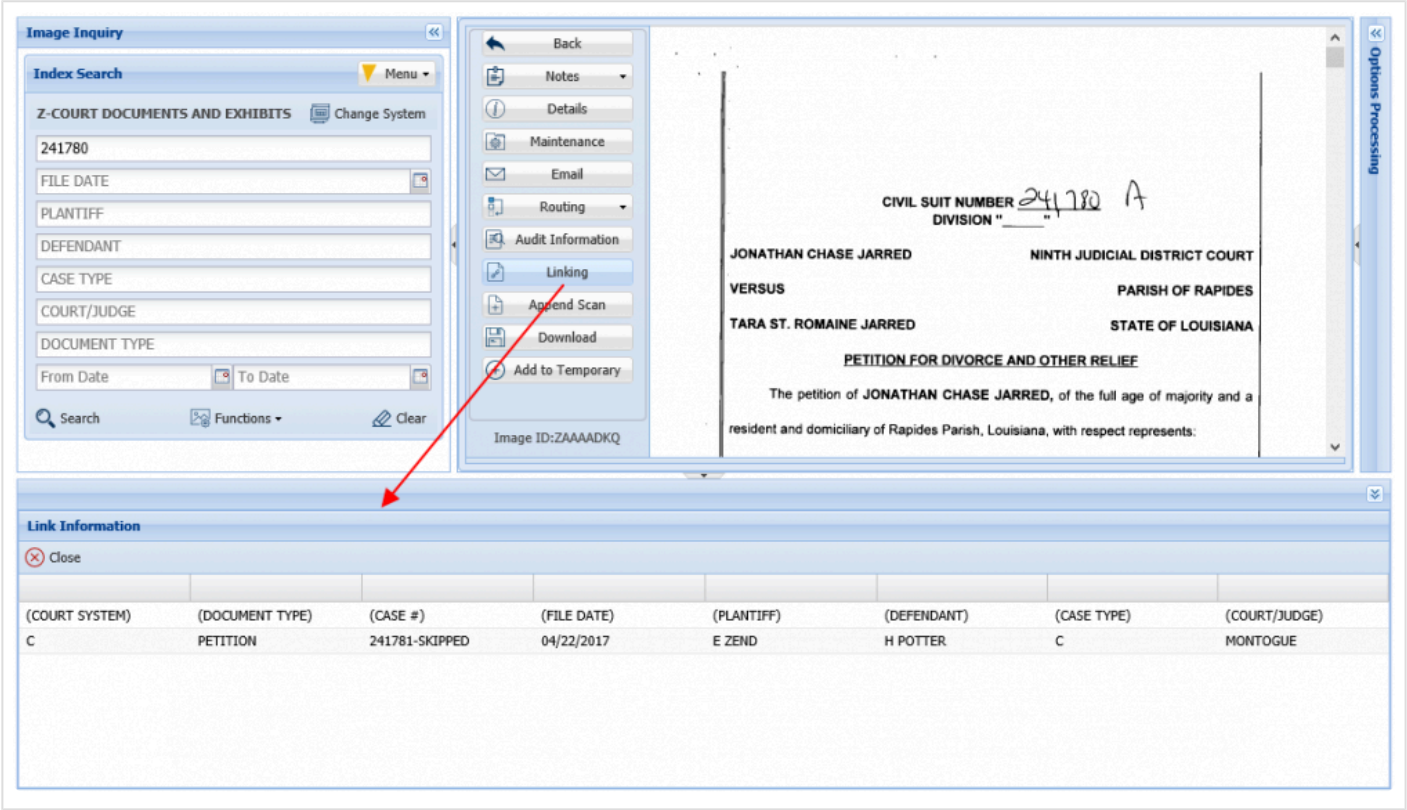


After displaying the image:

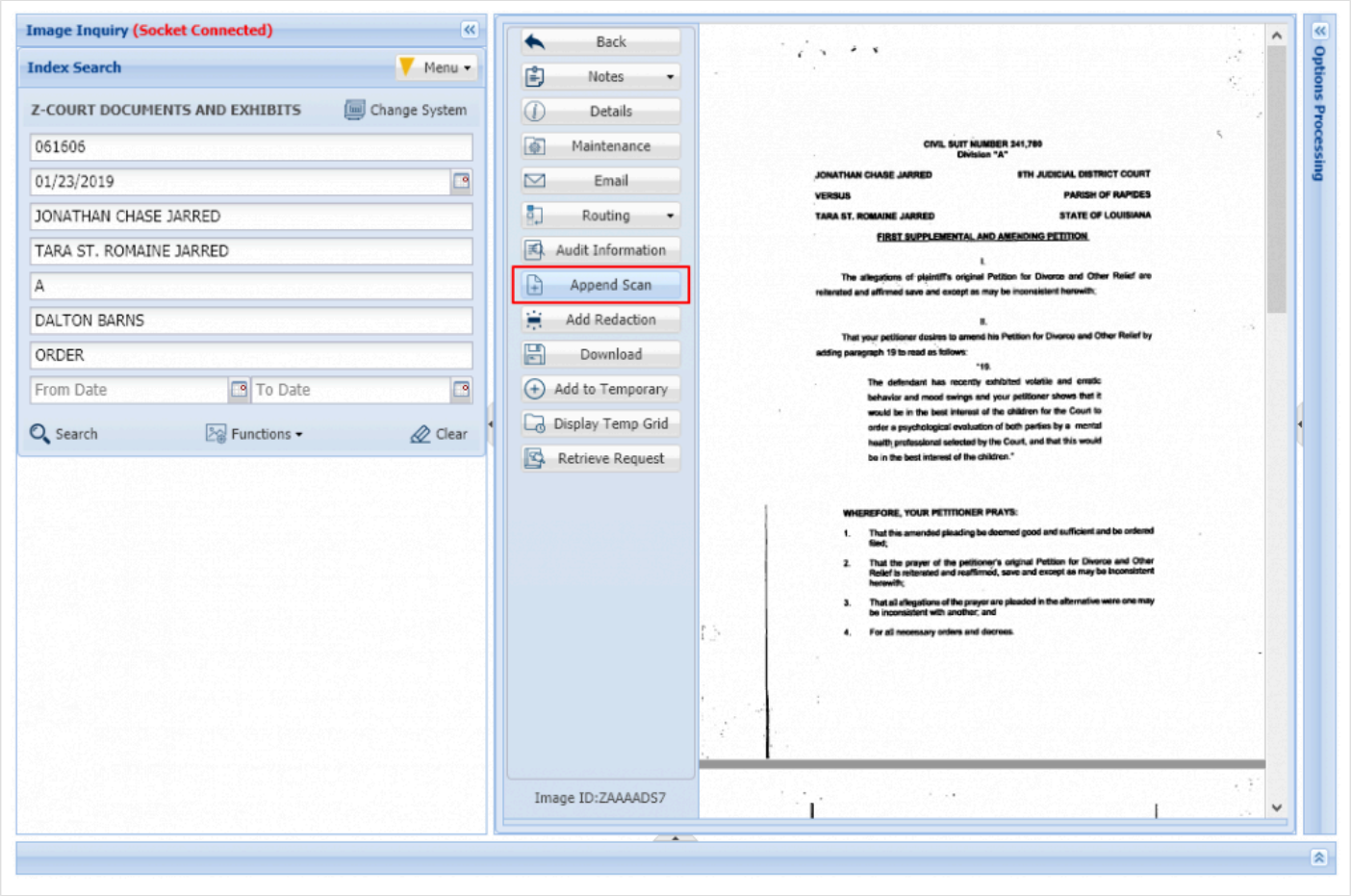
- The

button will be available.

- Click the Linking button to see a list of the documents (if any) that are linked to the primary document. Double click the record to view the linked documents.



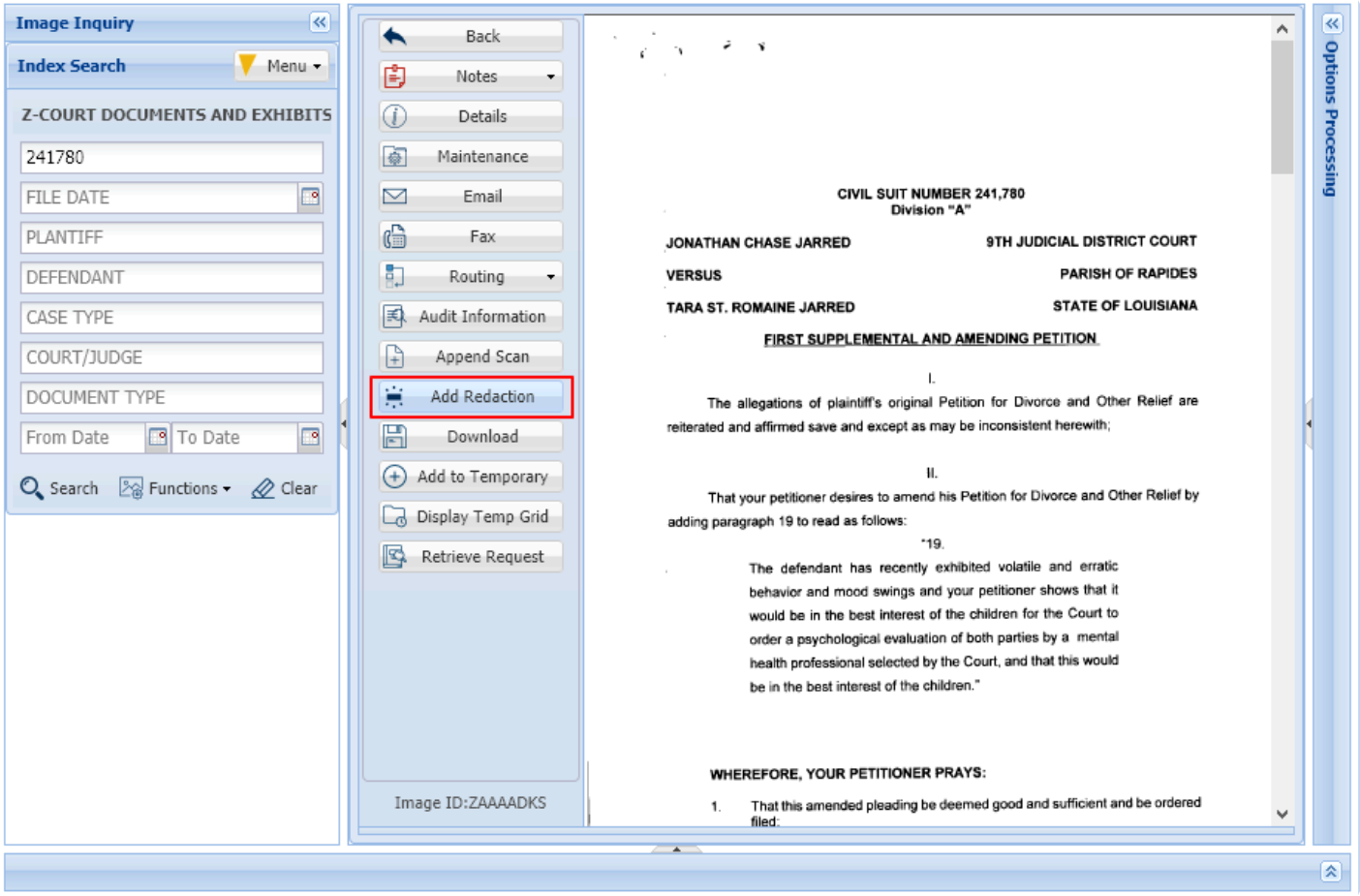
Append Scan: Adds pages to the end of an existing image. The scan process is automatically initiated when the Append button is selected.



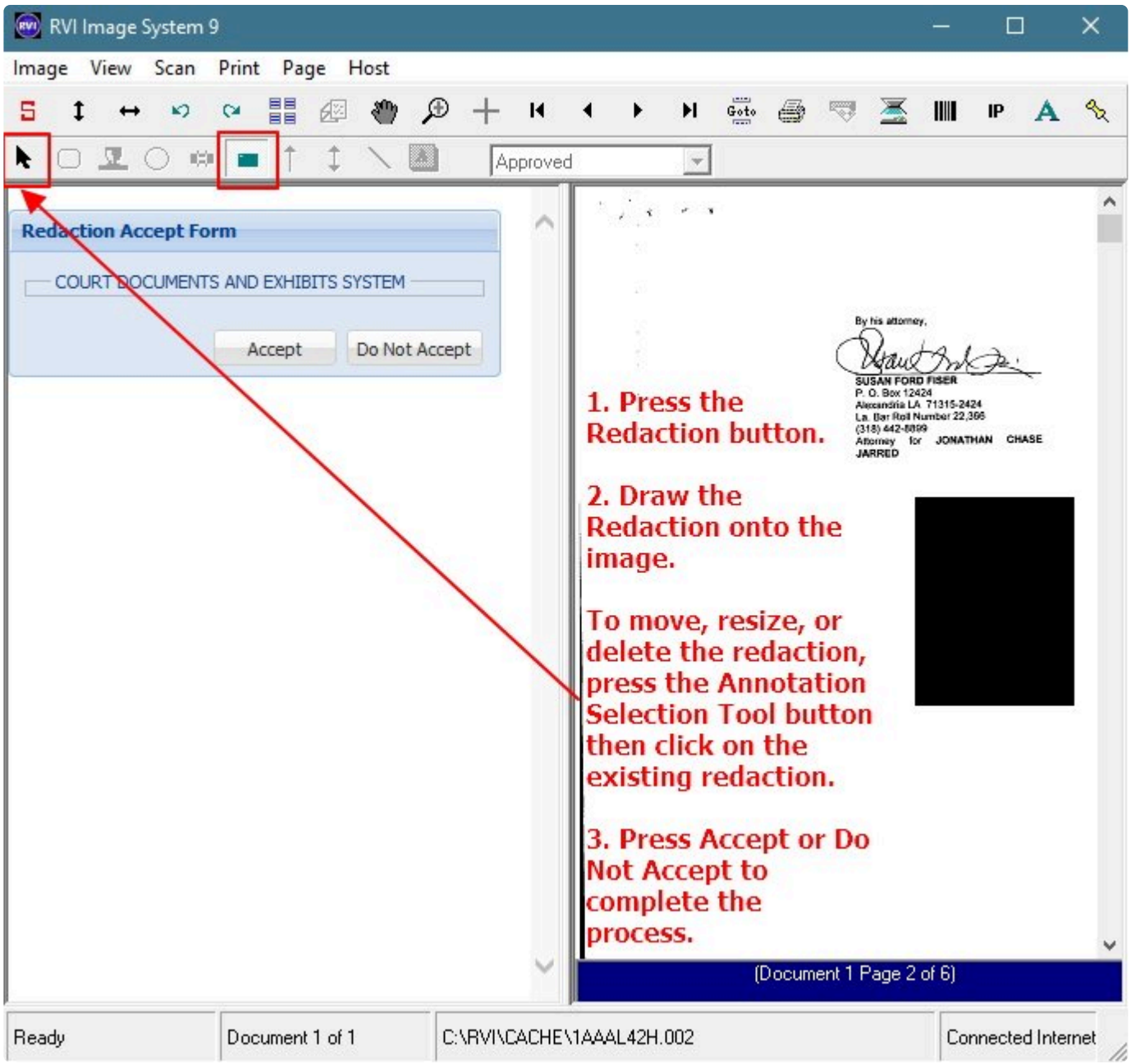
Add Redaction: Redact an area of an image using an opaque highlighter.

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

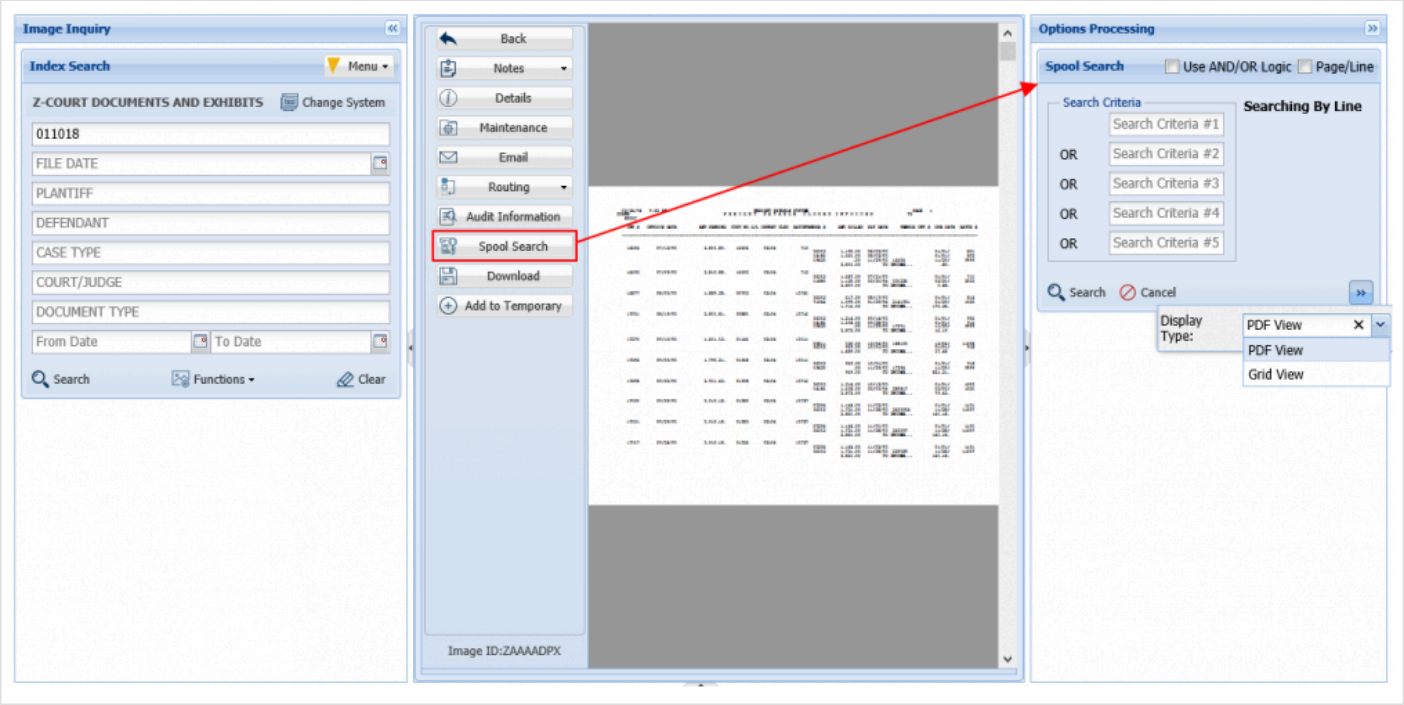
Display an image then select **Add Redaction**.



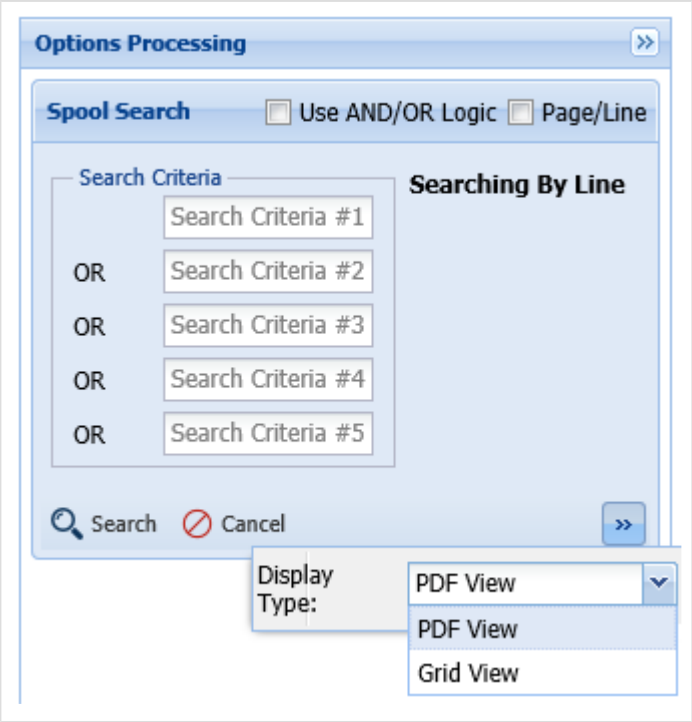
Once the image is displayed in the RVI PC Viewer, select the Redaction button then draw the redaction(s) onto the image. When complete, Accept or Do Not Accept the changes. The image will automatically be uploaded.



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).



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

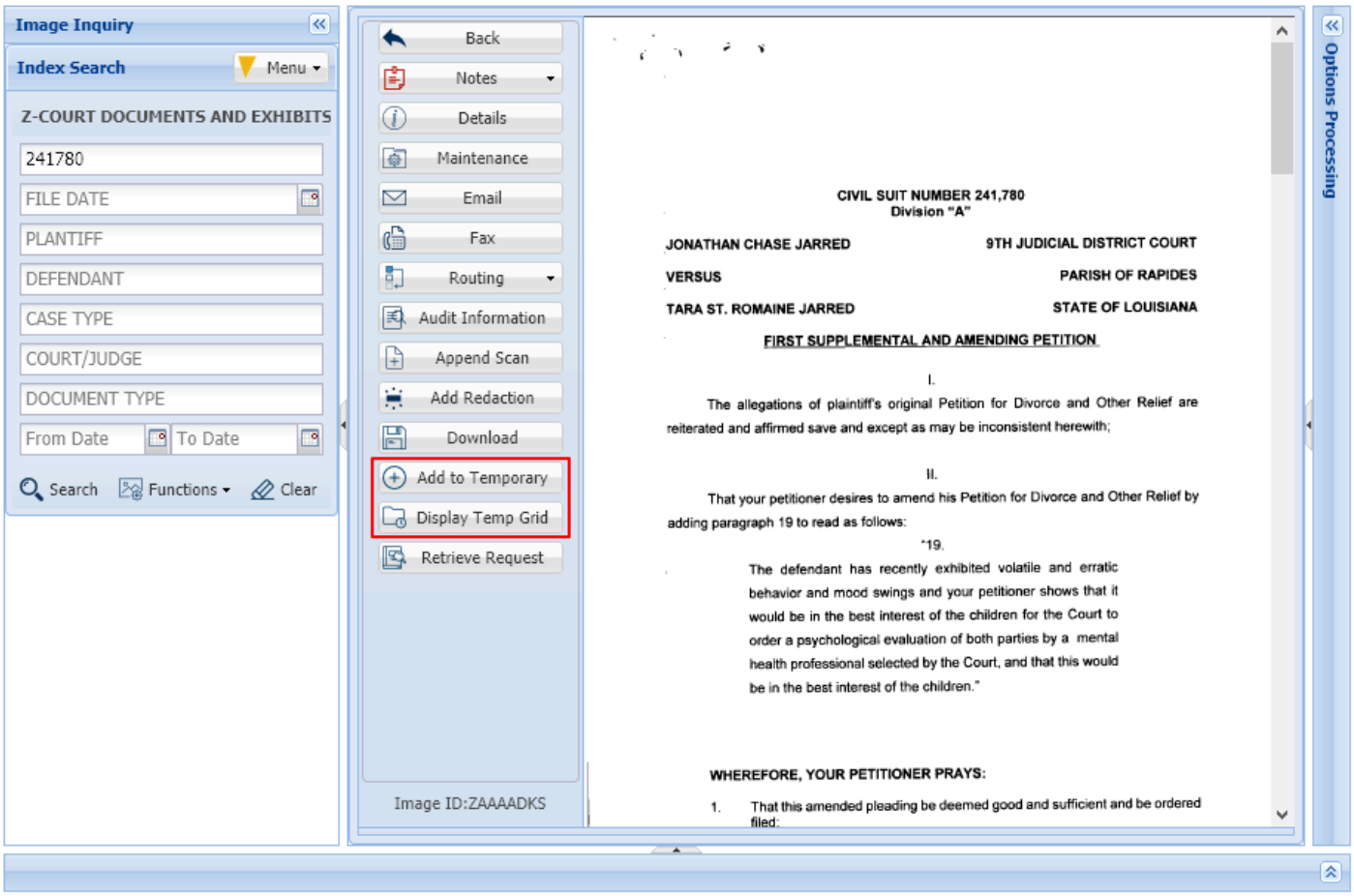


Download: Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.

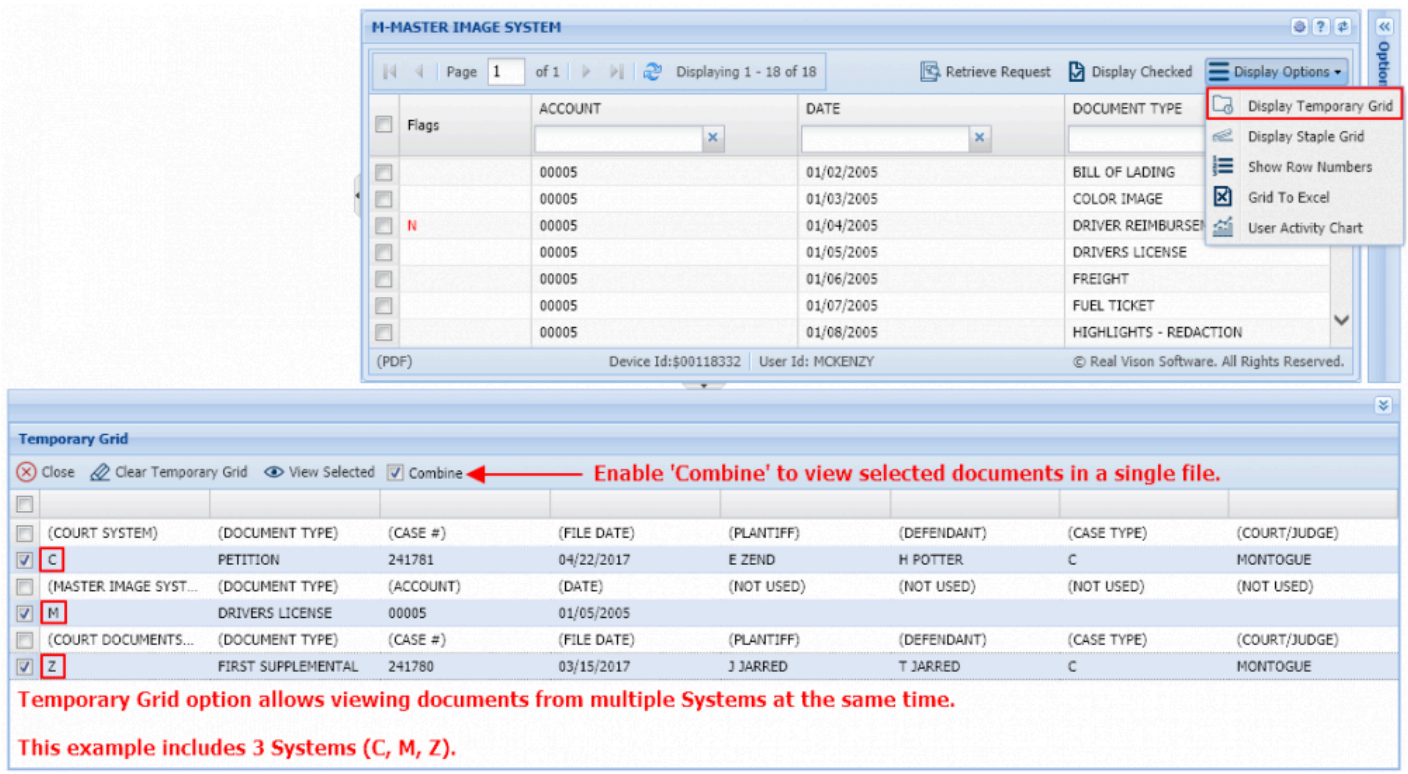
Add To Temporary: From image inquiry, temporarily store then view documents from any authorized system. The temporary storage folder is accessed through the Display Temp Grid button or Display Options, Display Temporary Grid in the upper right corner of the One Look Image Inquiry window or click

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.*)



Display Temp Grid: Display a listing of files stored from any authorized system in the temporary folder.



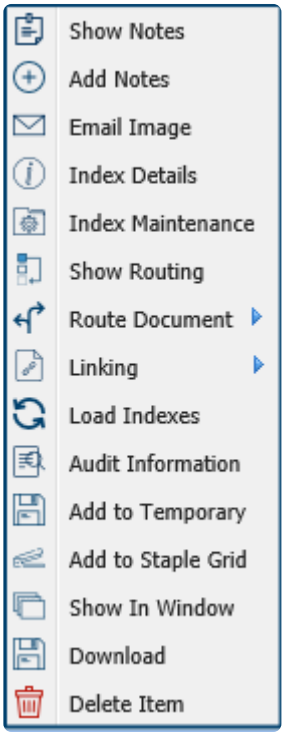
Retrieve Request: Manual information retrieval through a **CUSTOM INTERFACE** with the IBMi green screen used for One Look functions (View, Scan, Import, Upload) when polling or sockets is not used. Using the IBMi green screen, the user will navigate to and execute the **CUSTOM** function then press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

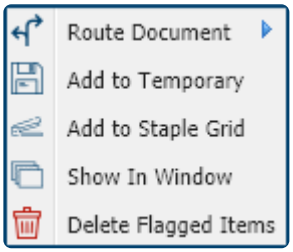
Retrieve Request is typically used by customers experiencing performance issues, customers that do not want to run sockets, or customers not running DataQue code for polling.

7.4. Index List & Right Click Menu

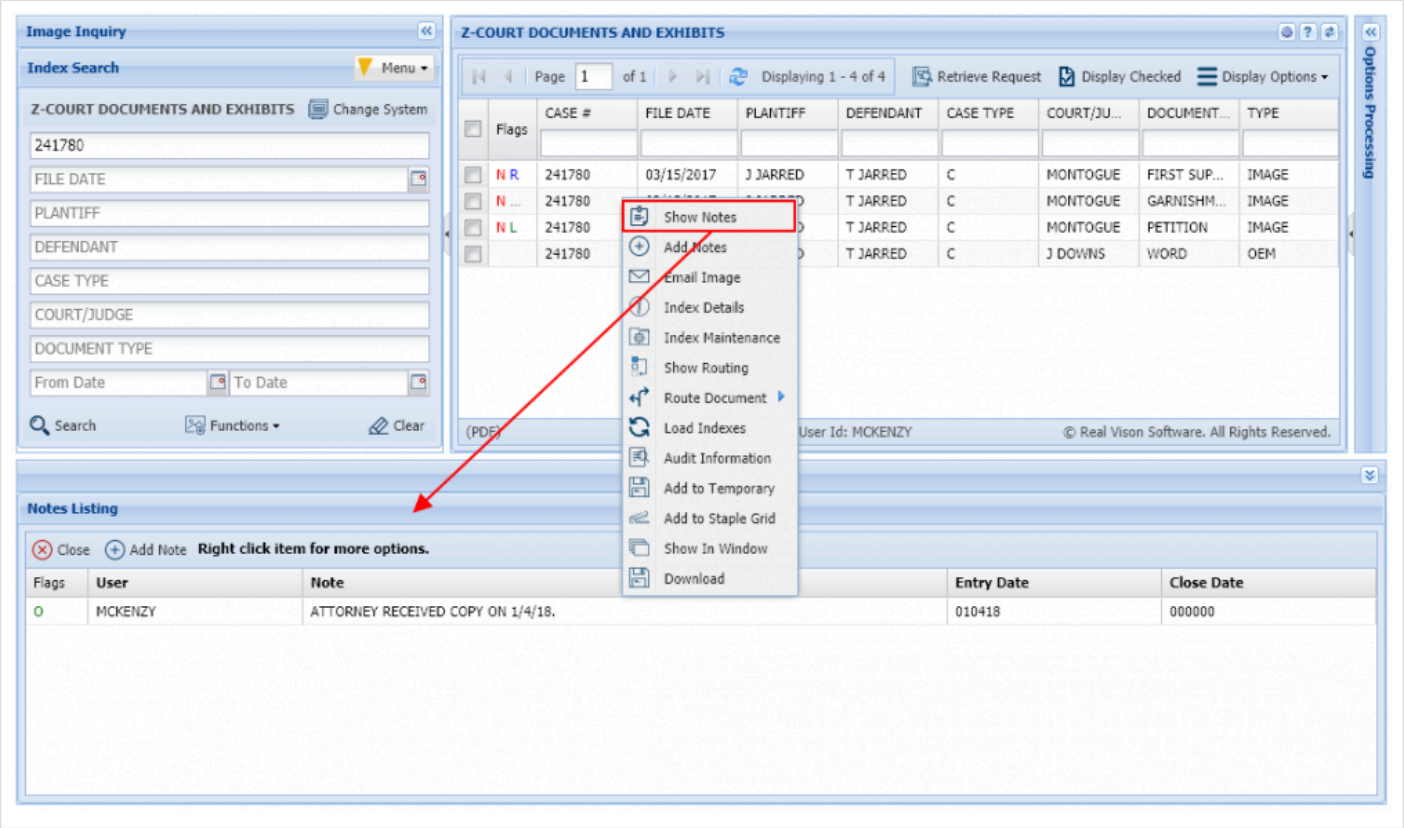
(Available by right-mouse clicking a single record in Image Inquiry.)



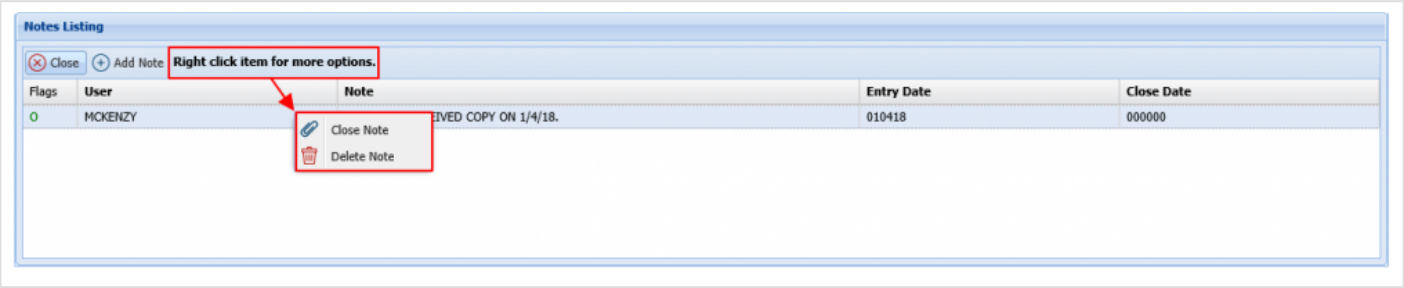
If multiple records are flagged, ***Route Document****,* ***Add to Temporary****,* ***Add to Staple Grid****,* ***Show In Window****, and* ***Delete Flagged Items*** *will be the only available options.*



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



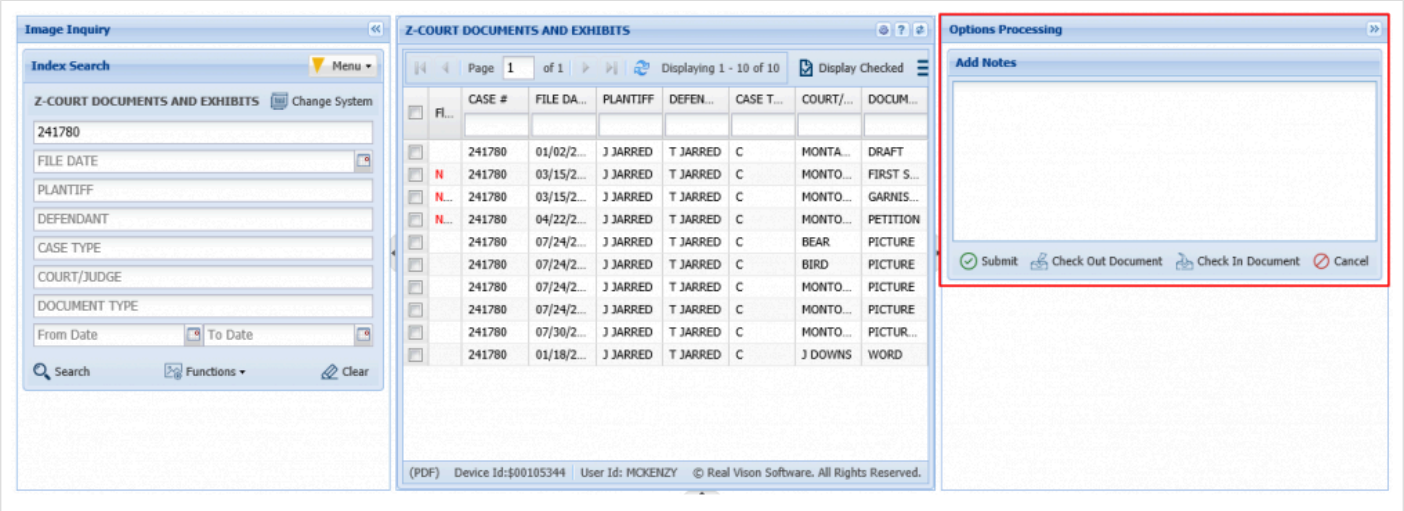
From the Notes Listing, users can Close or Delete notes by right clicking a record.



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

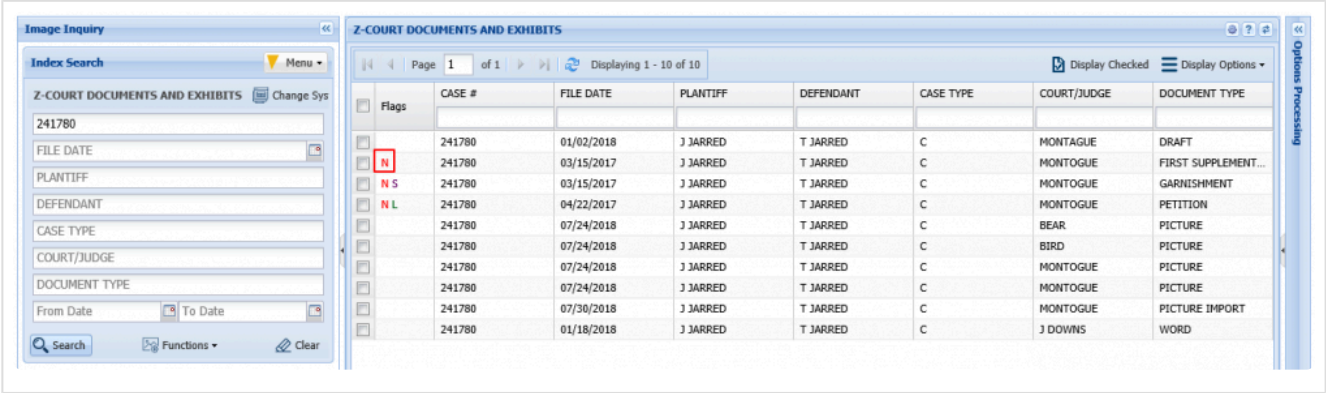
When a user is adding a note, the record can be checked out using the

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

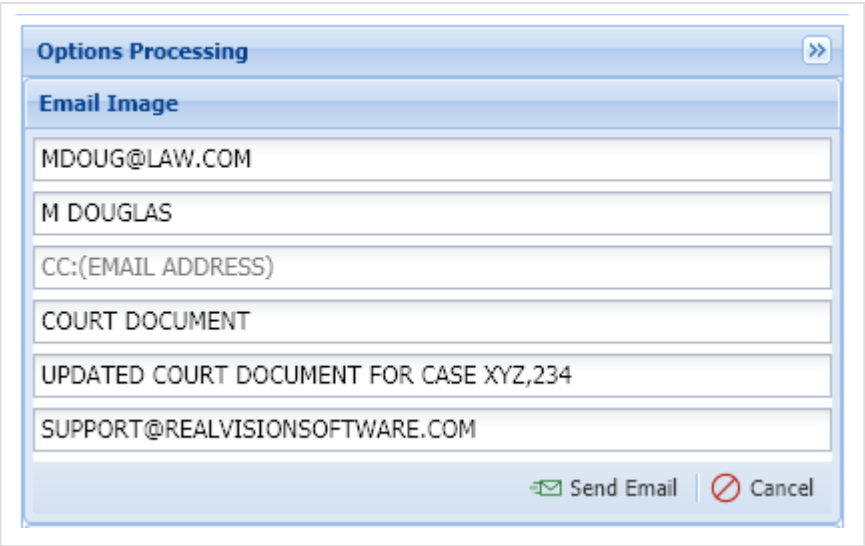


Once you complete the notes entry select

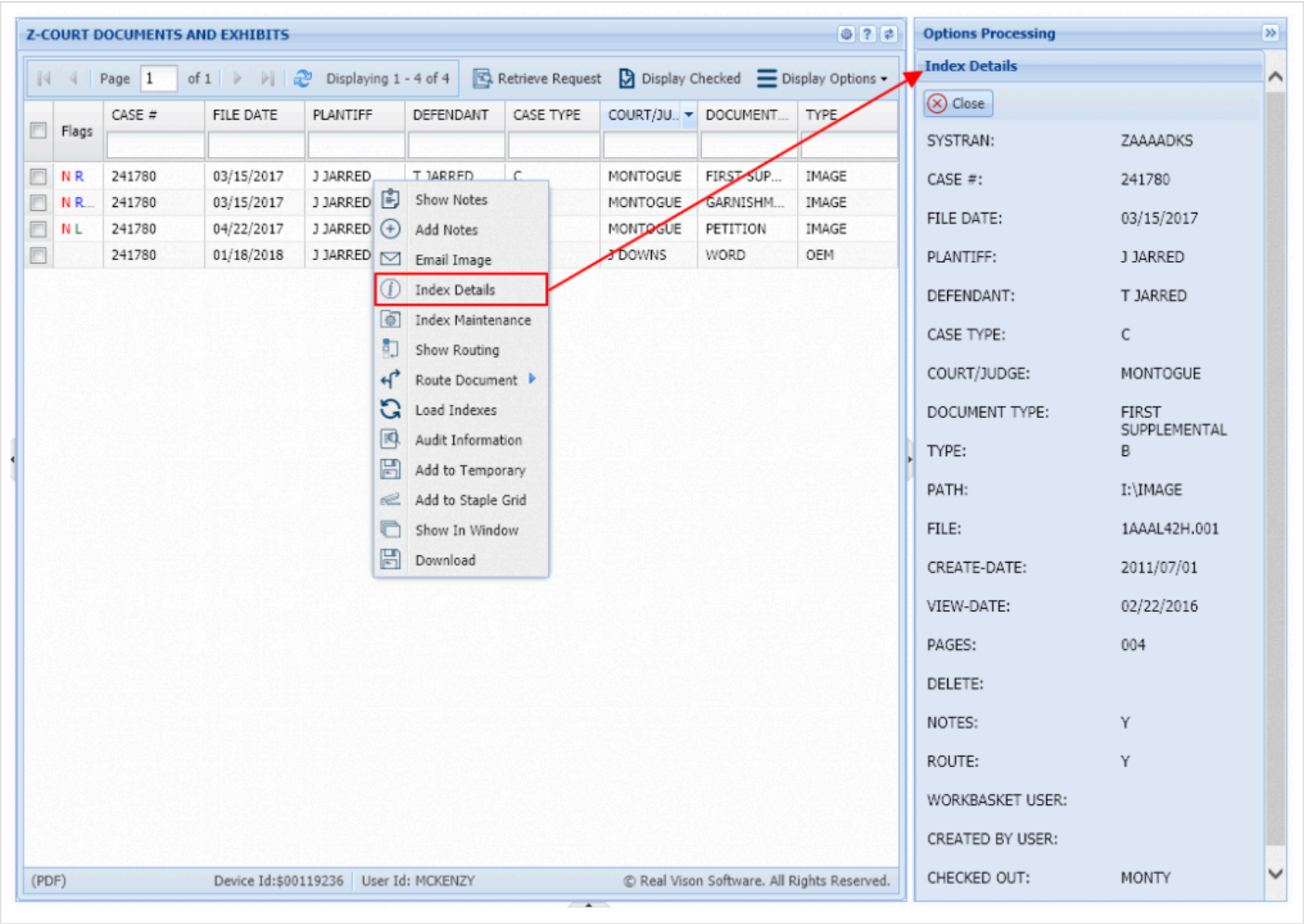
- When notes exist, the system will display a 'N' next to the record.



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

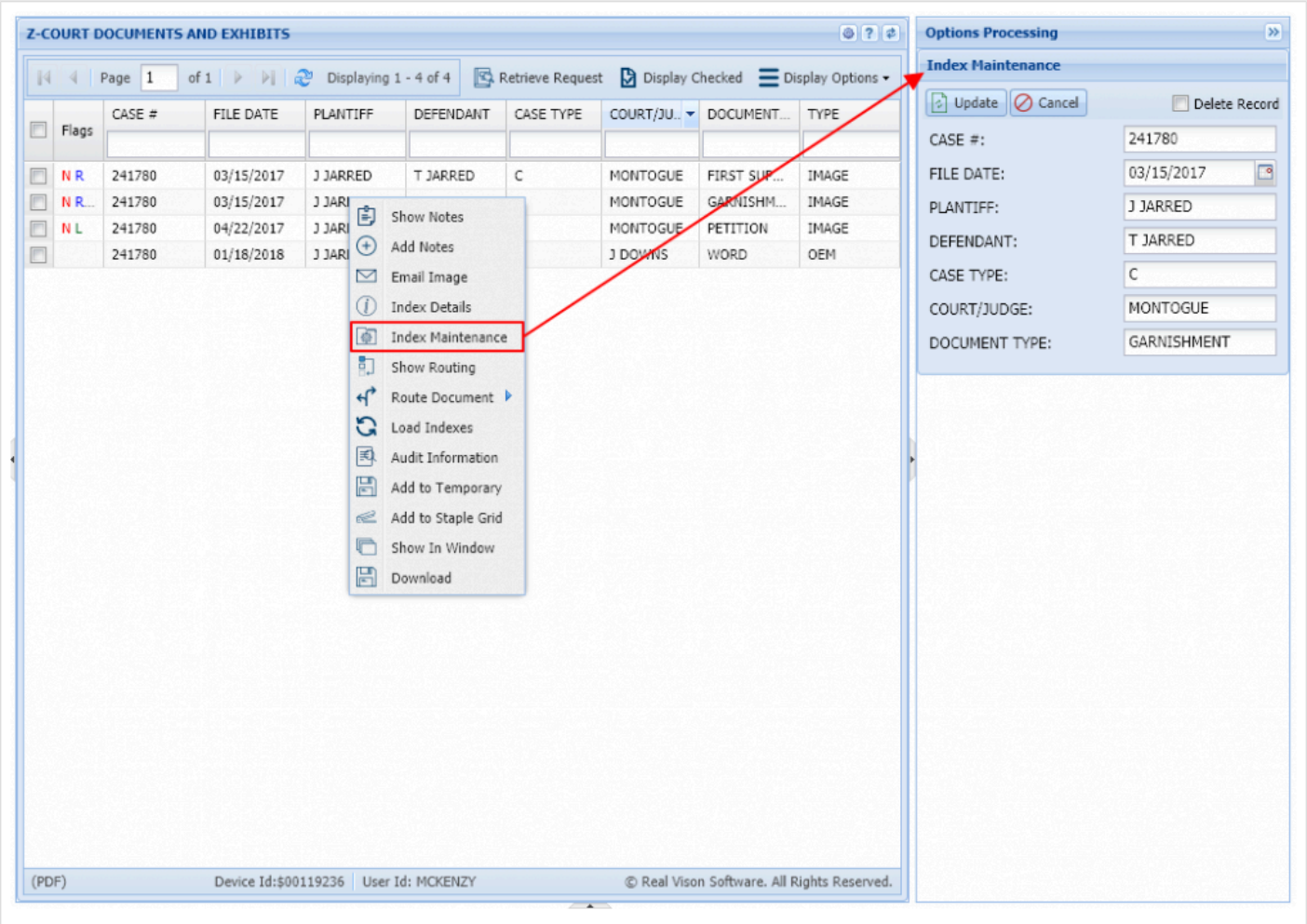


Index Details: Shows the details such as the filename, path, page count, create date.

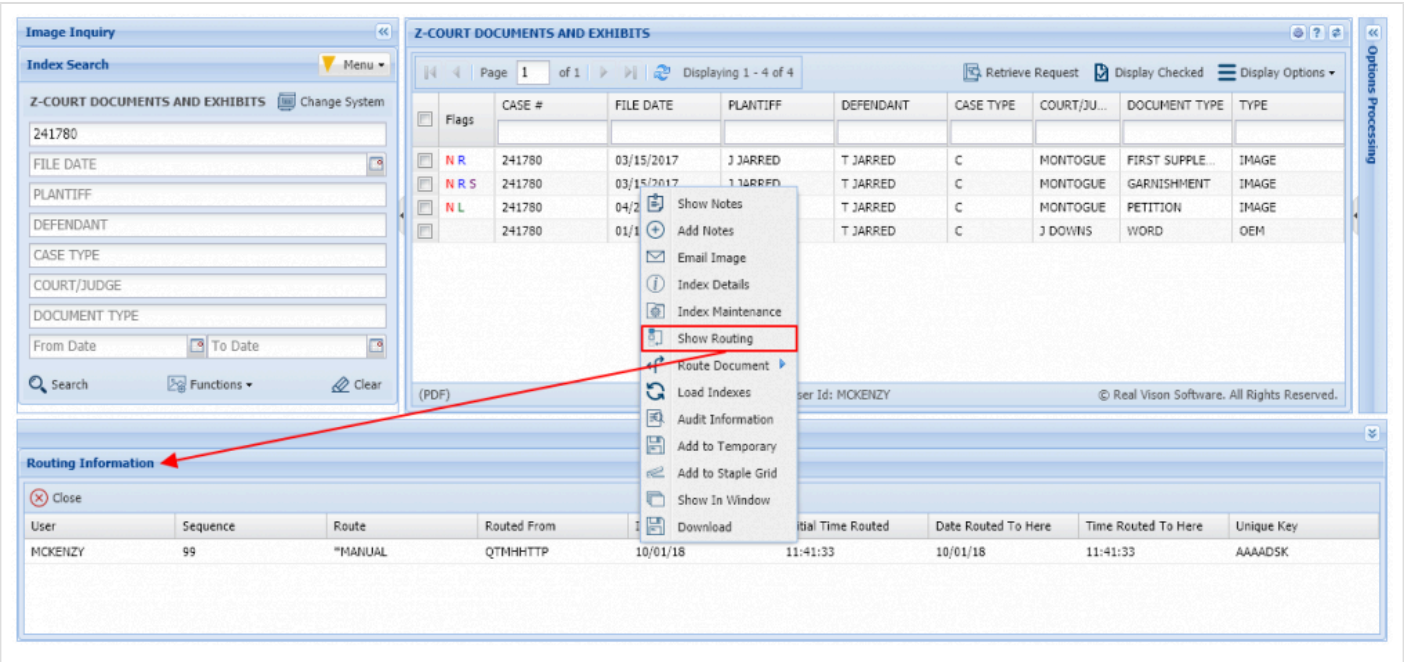


This information is helpful for troubleshooting. Use this information to identify the filename and location of the file when reporting problems to RVI Support.

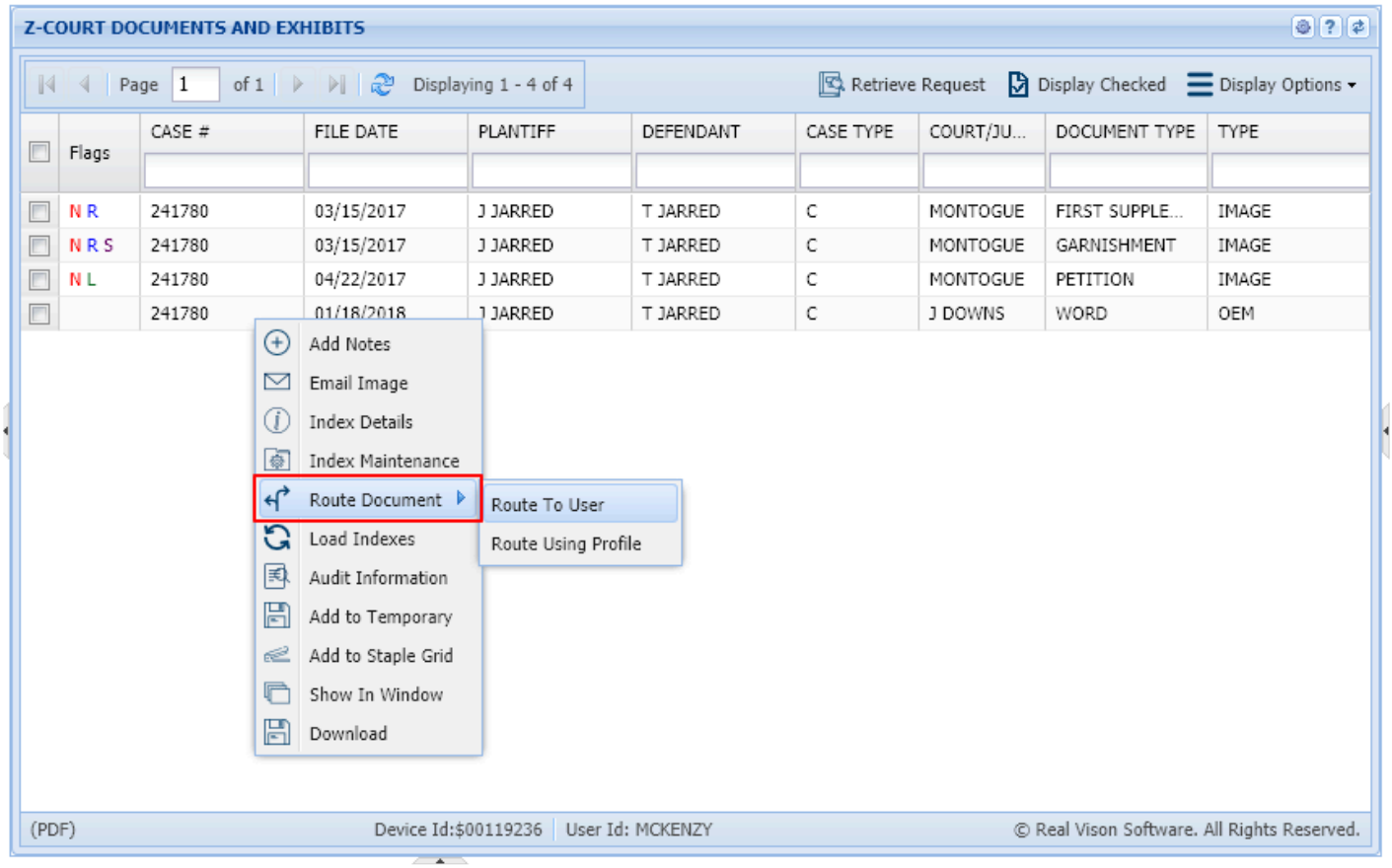
Index Maintenance: Allows for the updating of index values and the deletion of the record.



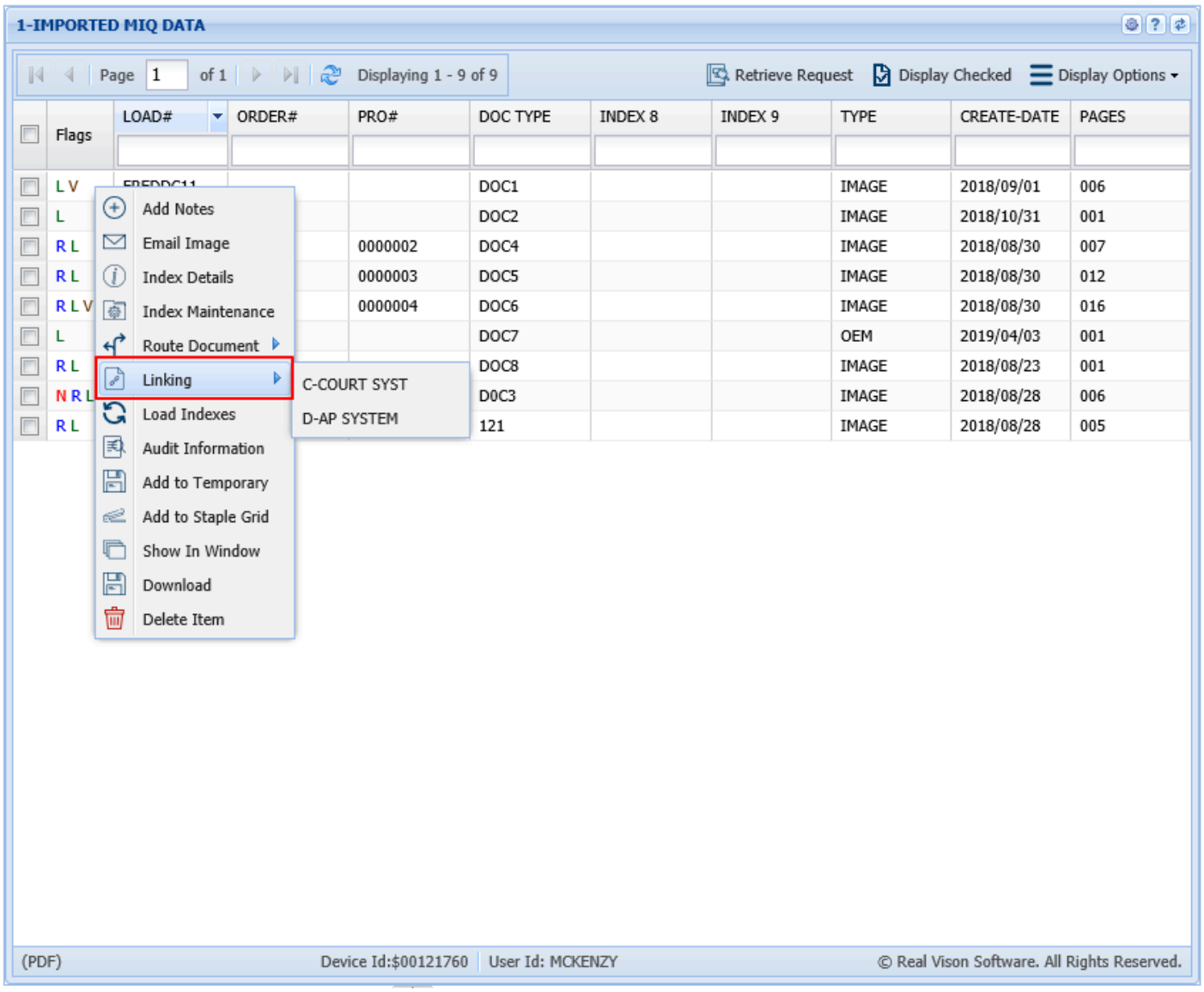
Show Routing: Shows the sequence, route, date, and time associated with the routing event.



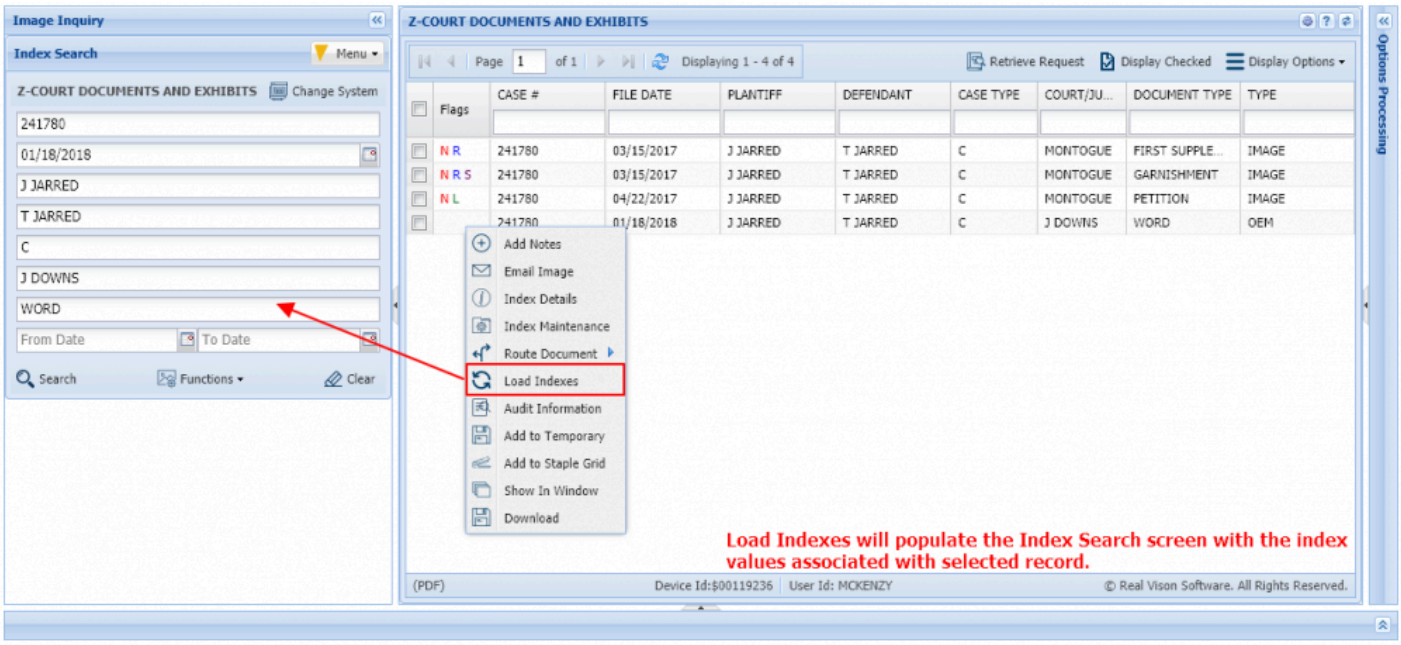
Routing Document: Route the document(s) by user id or profile.



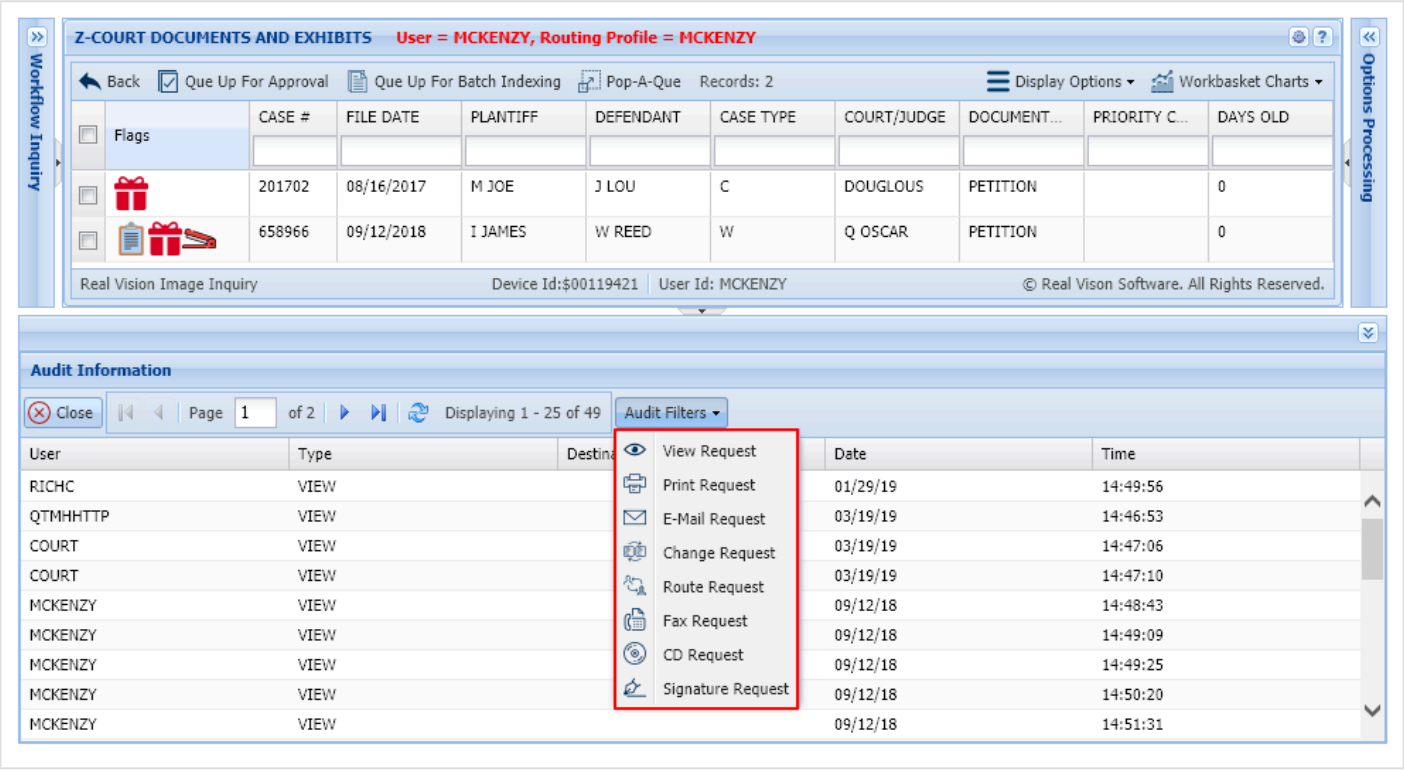
Linking: List linked documents.*If links do not exist, the user will not get the Linking option.*



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

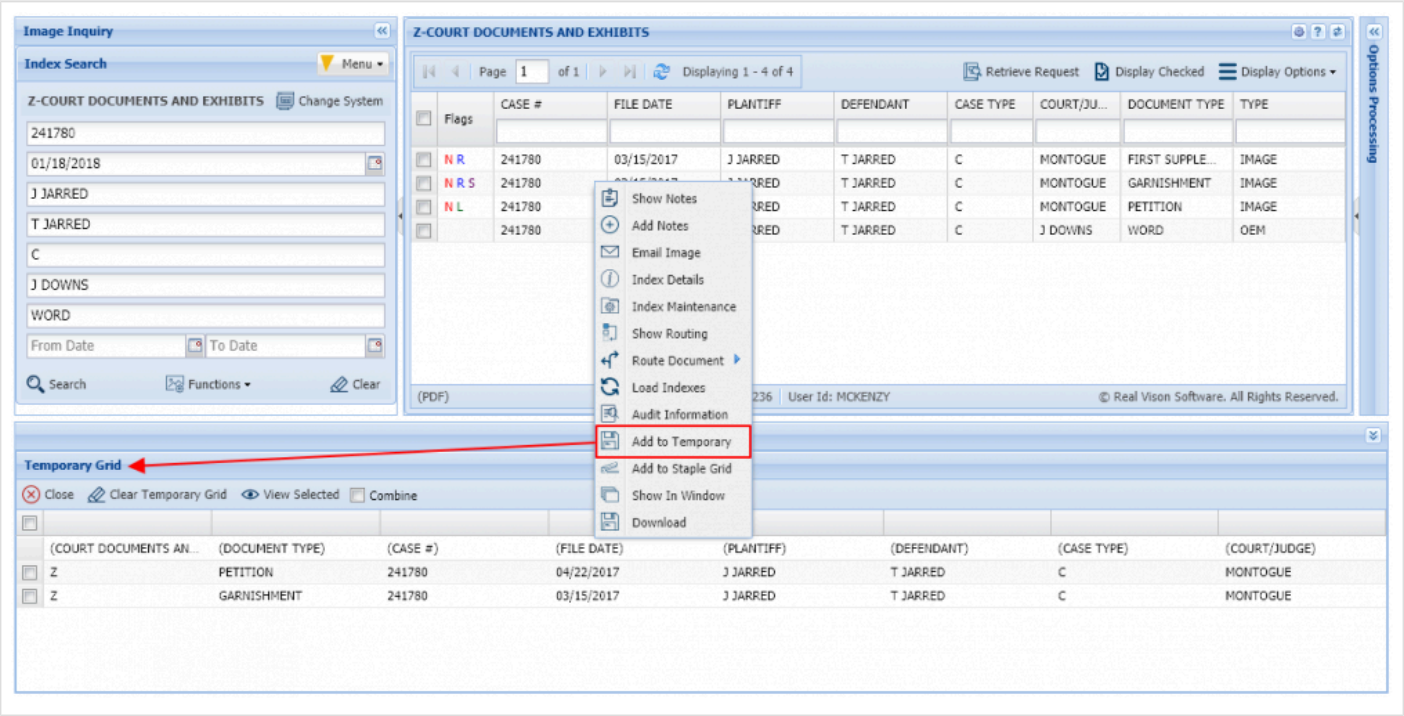


Audit Information: Provides the ability to view all activity for the document being viewed.
Available filters: View, Print, Email, Change, Route, Fax, CD, Signature

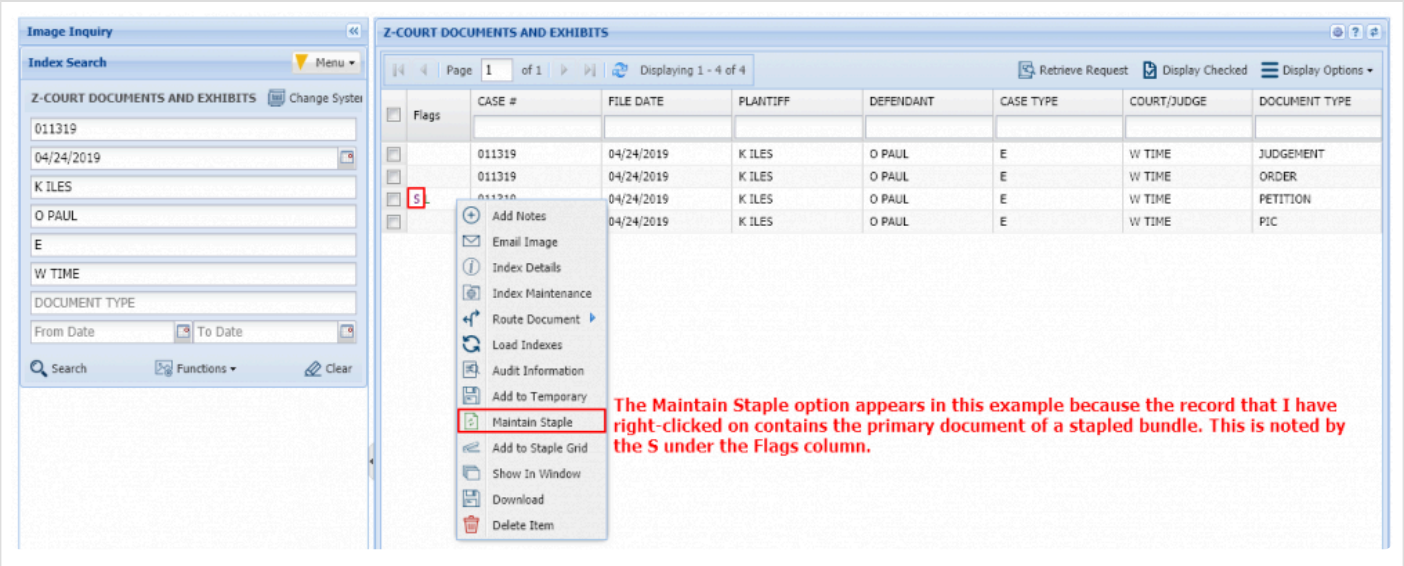


Add to Temporary: Temporary Folder provides a holding area where users can store a copy of any

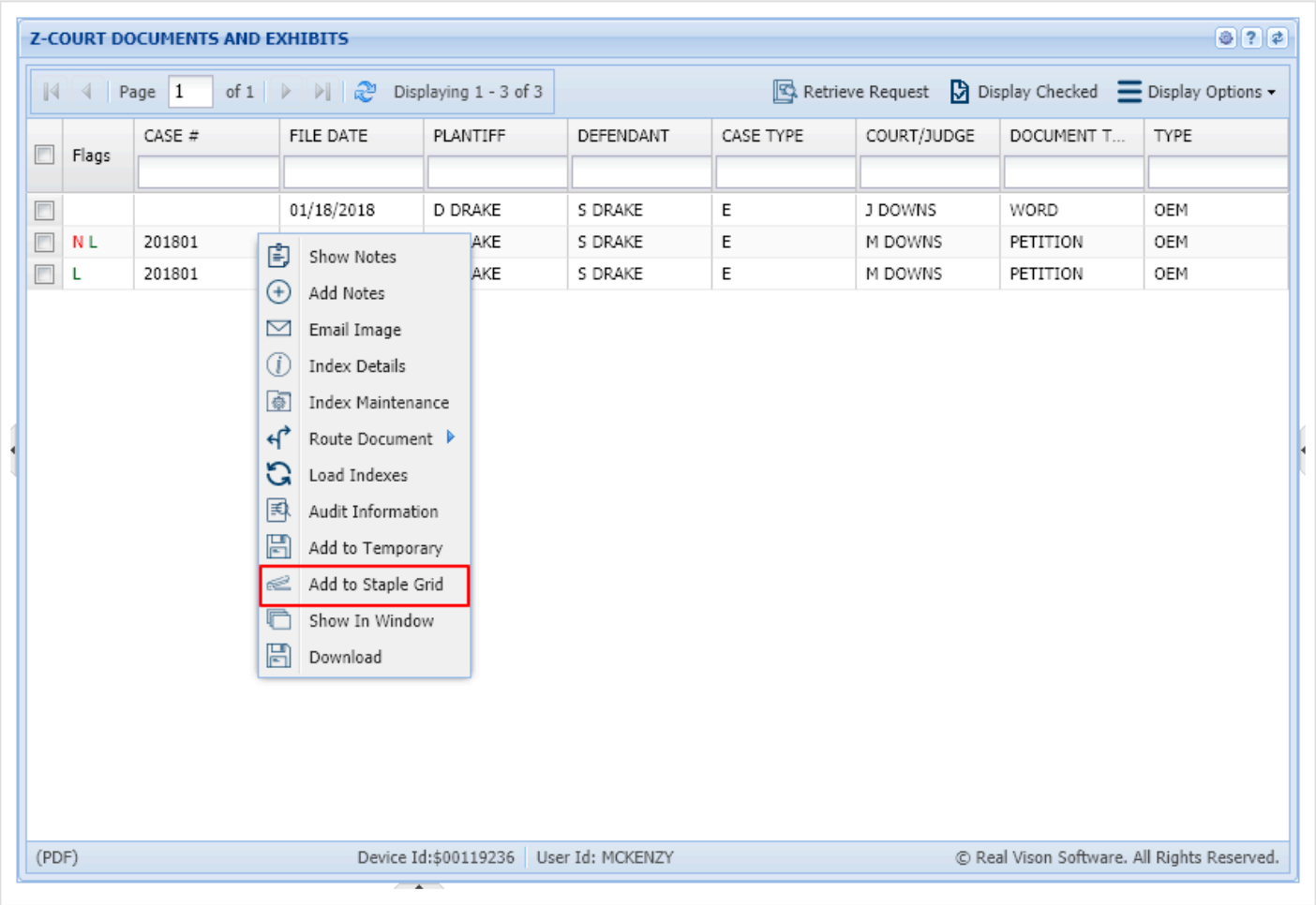
document from any system to be used for temporary viewing and file comparison. The temporary folder is updated every time the user refreshes the page.
(*The temporary grid is cleared automatically when the user logs off.*)

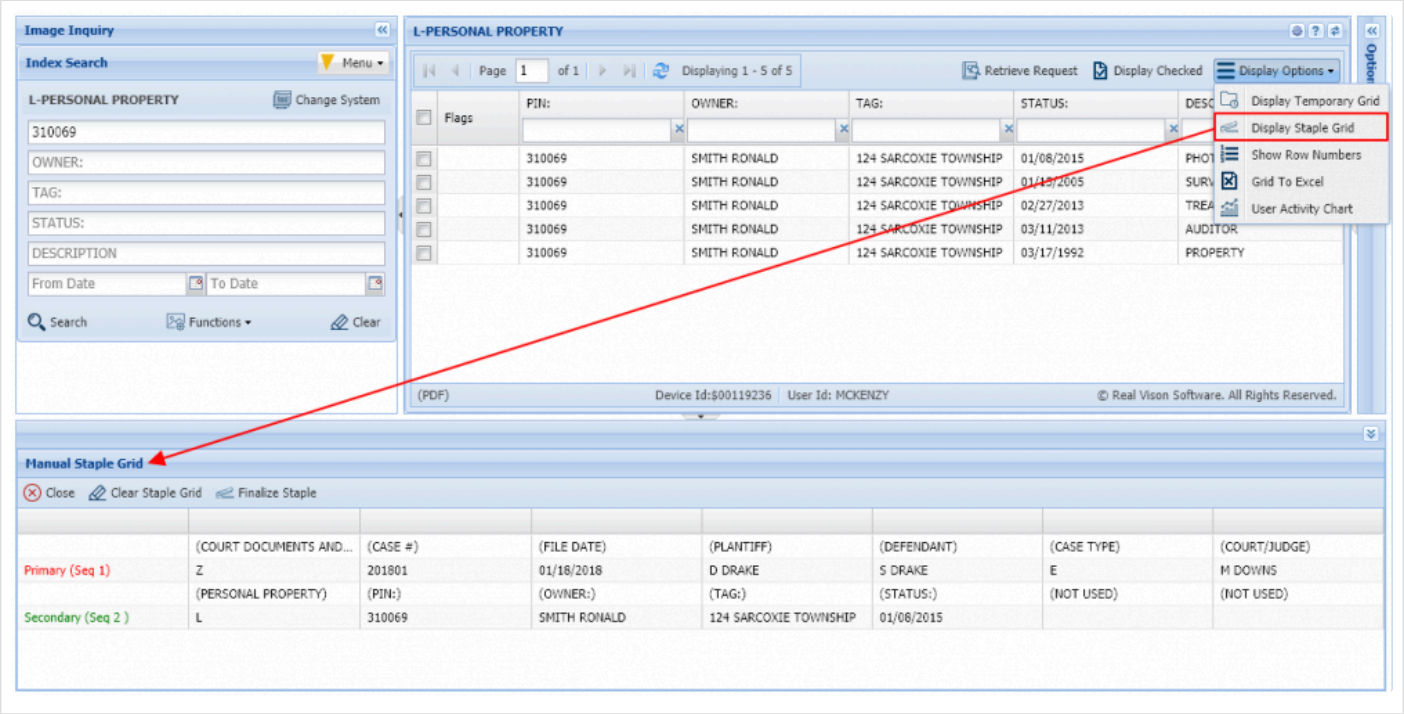


Maintain Staple: Update an existing stapled bundle. *Only appears when the record you are selecting contains the primary stapled document.*

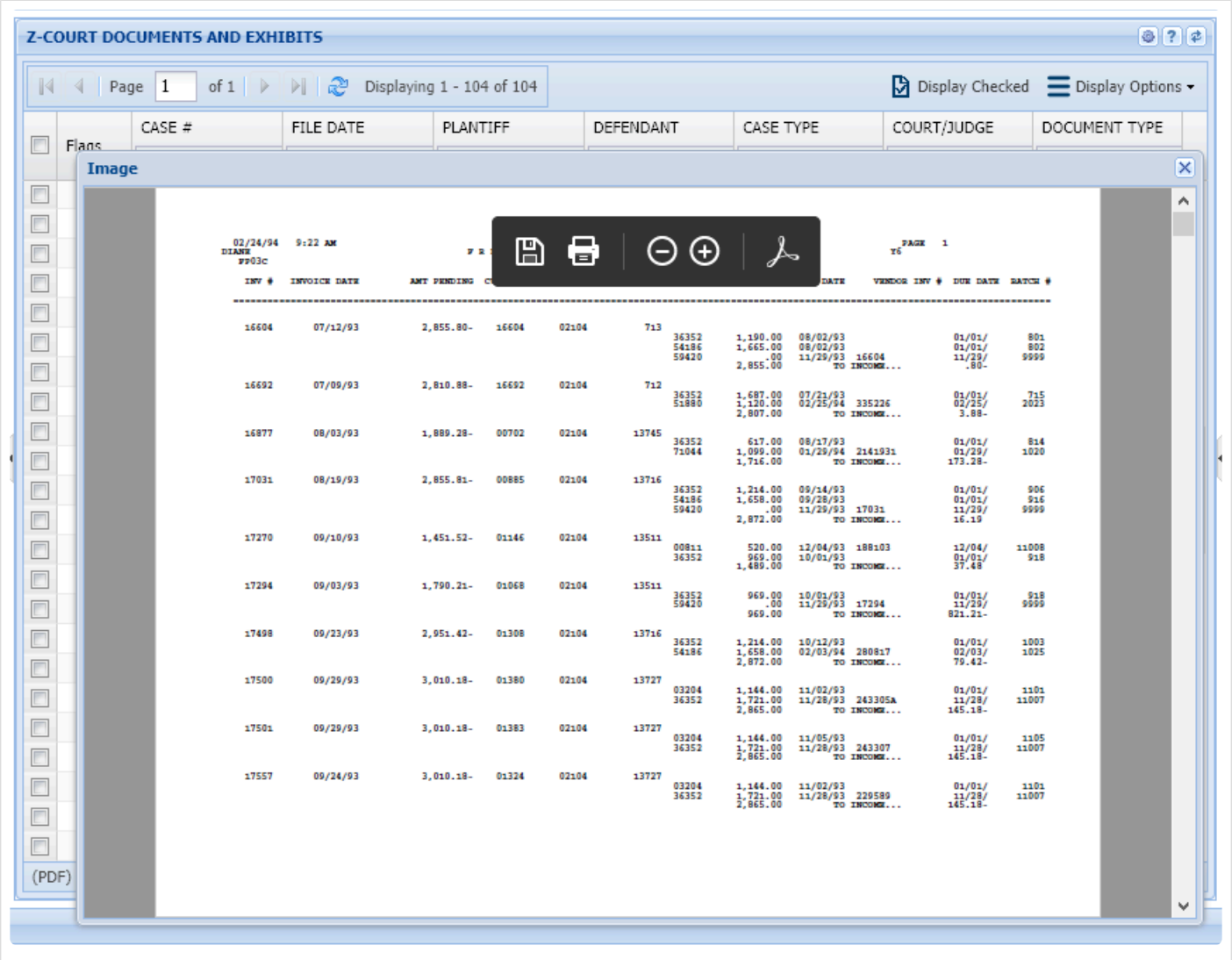


Add to Staple Grid: Select a primary document then supporting documents from any system to the staple grid. Once all documents are in the staple grid the user can Finalize the staple process. Once the documents are stapled, if the primary document is viewed the system will automatically display the supporting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

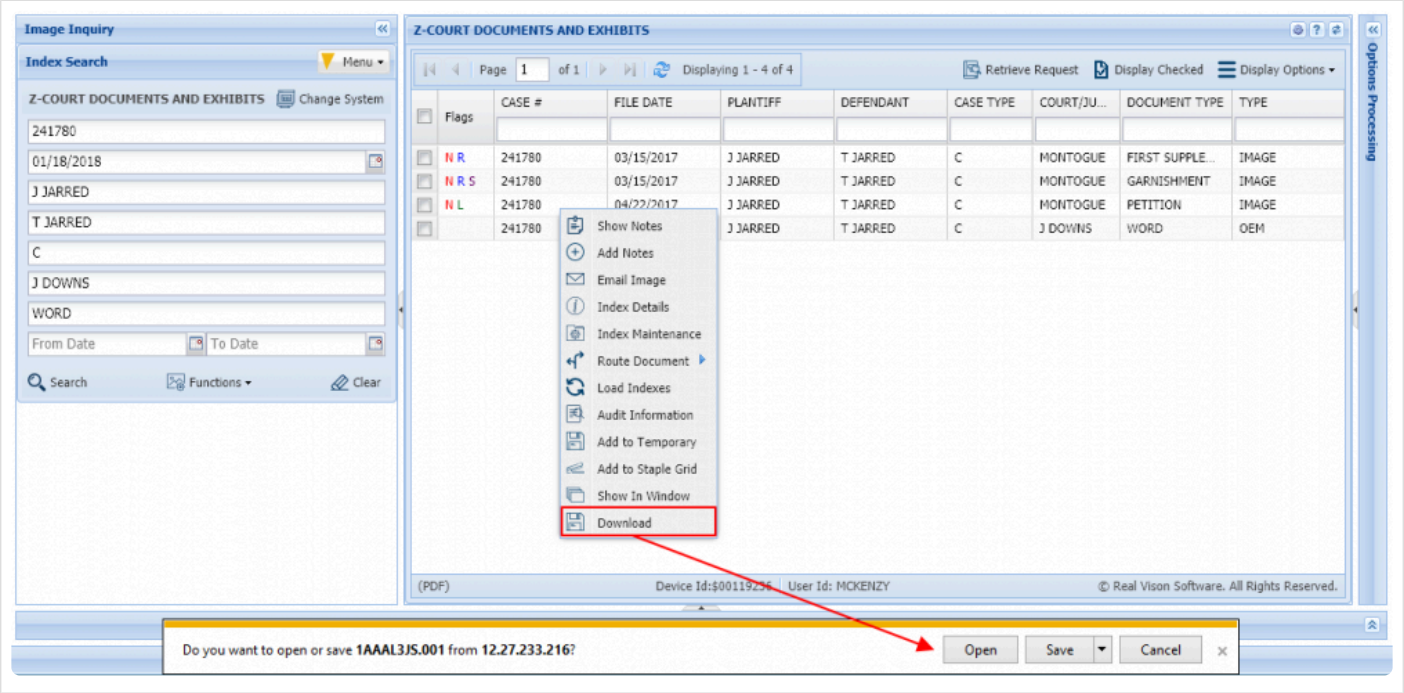




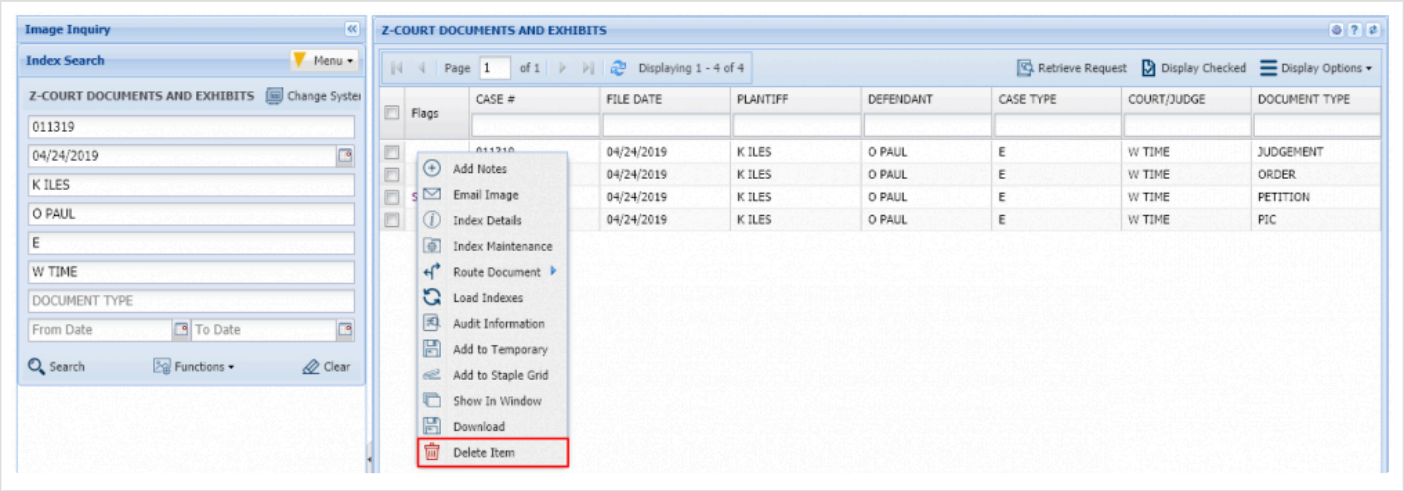
Show In Window: View the selected document(s) in a new window frame.



Download: Save the selected document to local storage.



Delete Item: Delete the selected record from Image Inquiry.



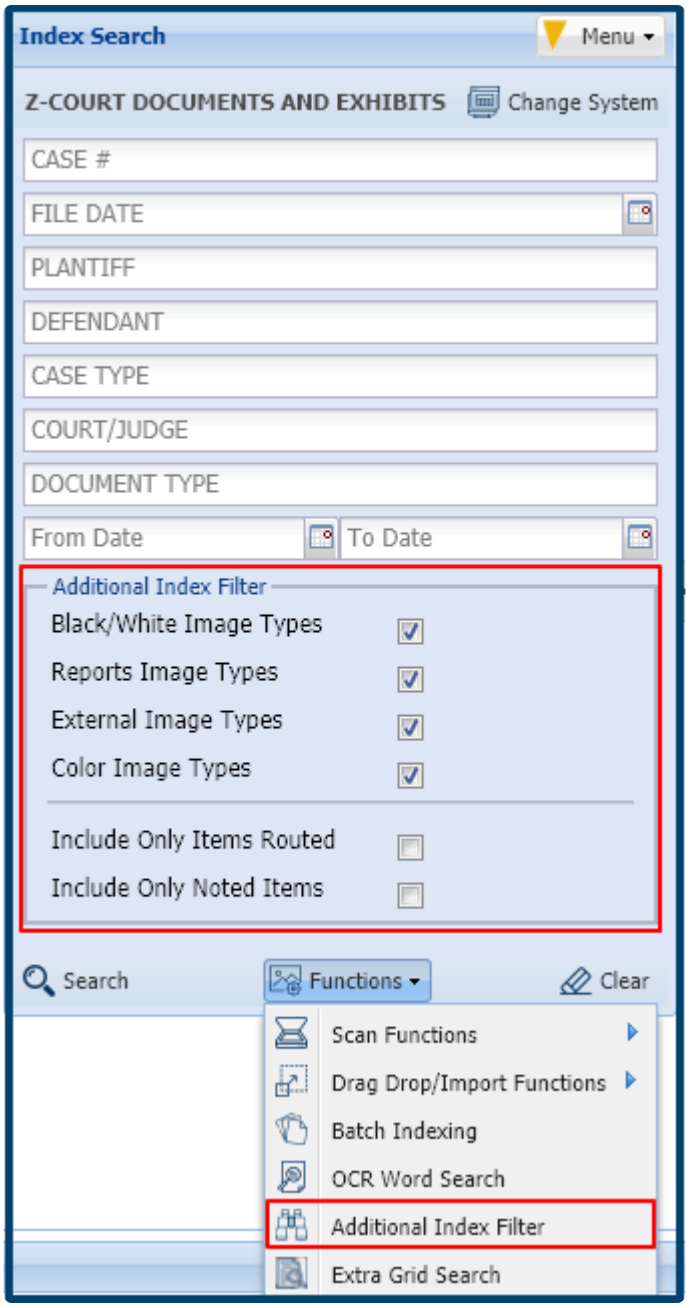
8. FUNCTIONS

RVI One Look provides the following functions:

Audit	**Drag Drop**	**Email**	**Fax** *(Customer must have fax adapter installed.)*
File Import	**Image Index Maintenance**	**Image Markup**	**Linking**
Notes	**OCR** *(Customer must purchase OCR license.)*	**Print** *(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.



Provides an advanced index search allowing users to narrow the search results by the following image types:

- Black/White
- Reports
- External (*such as Microsoft Office files*)
- Color

Additional search criteria include:

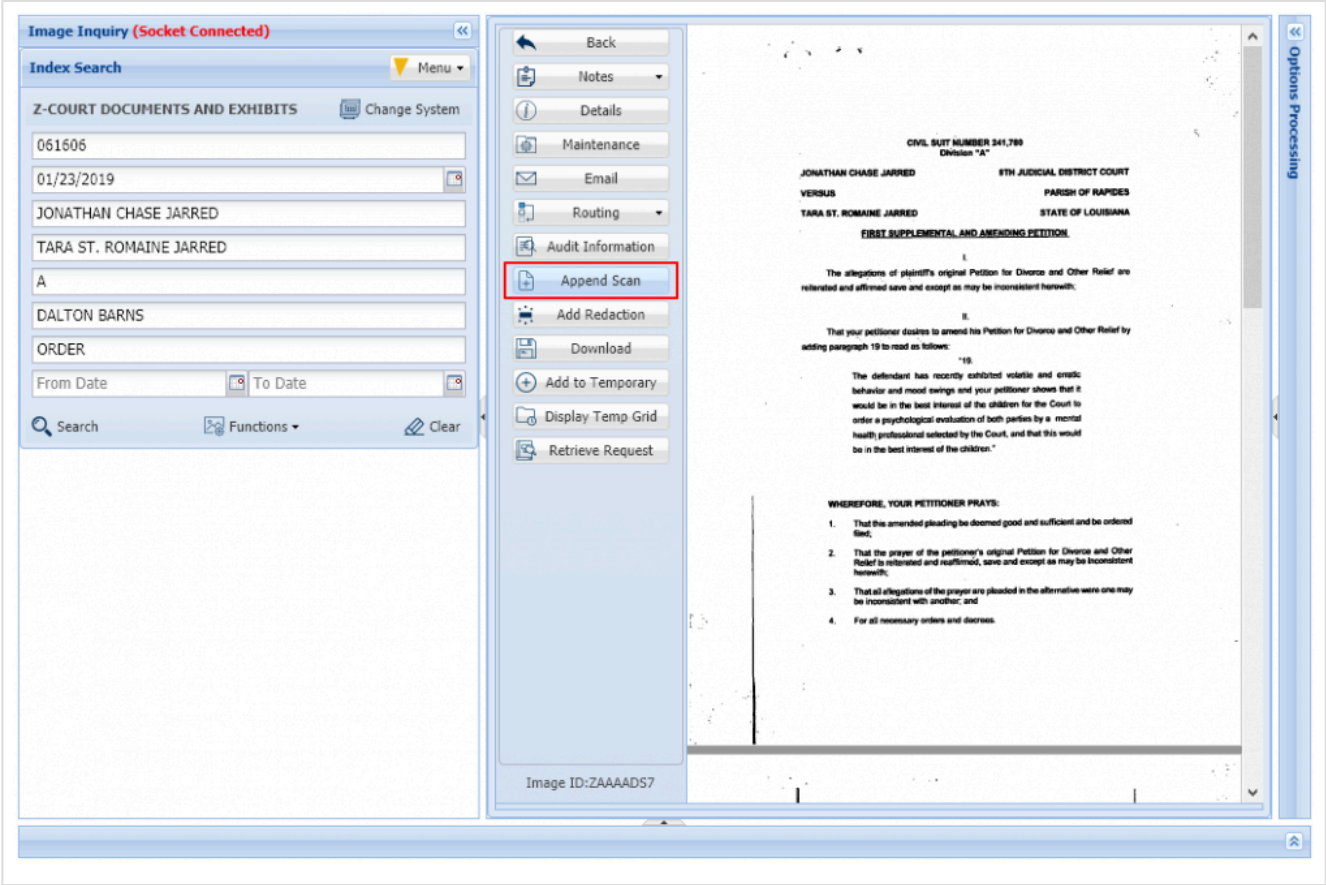
- Routed Items
- Noted Items

8.2. Append

To watch a video on this topic CLICK HERE

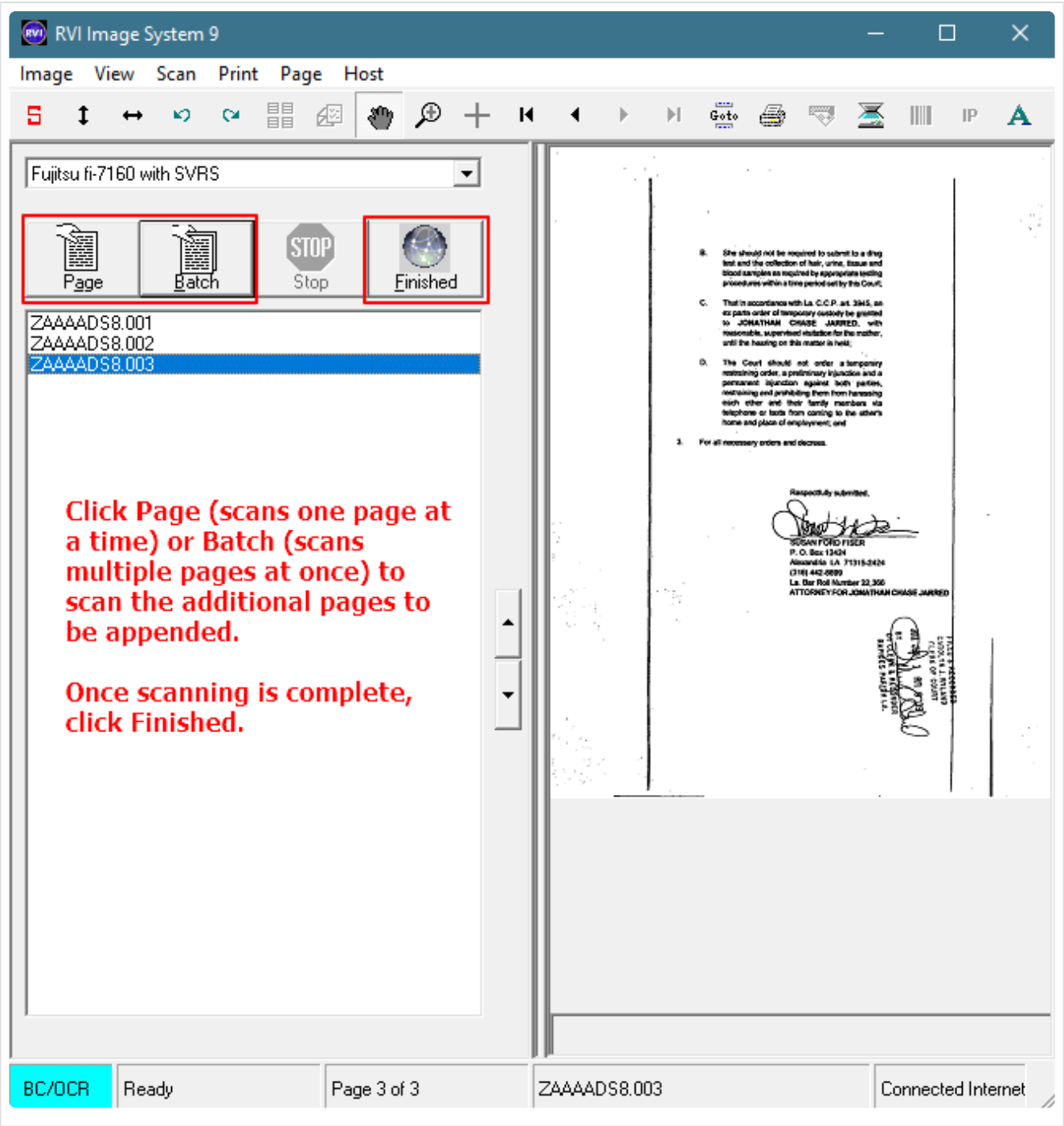
Scan additional pages to an existing image. (*Appends are not available for OEM documents such as PDF, DOCX, XLSX.*)

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

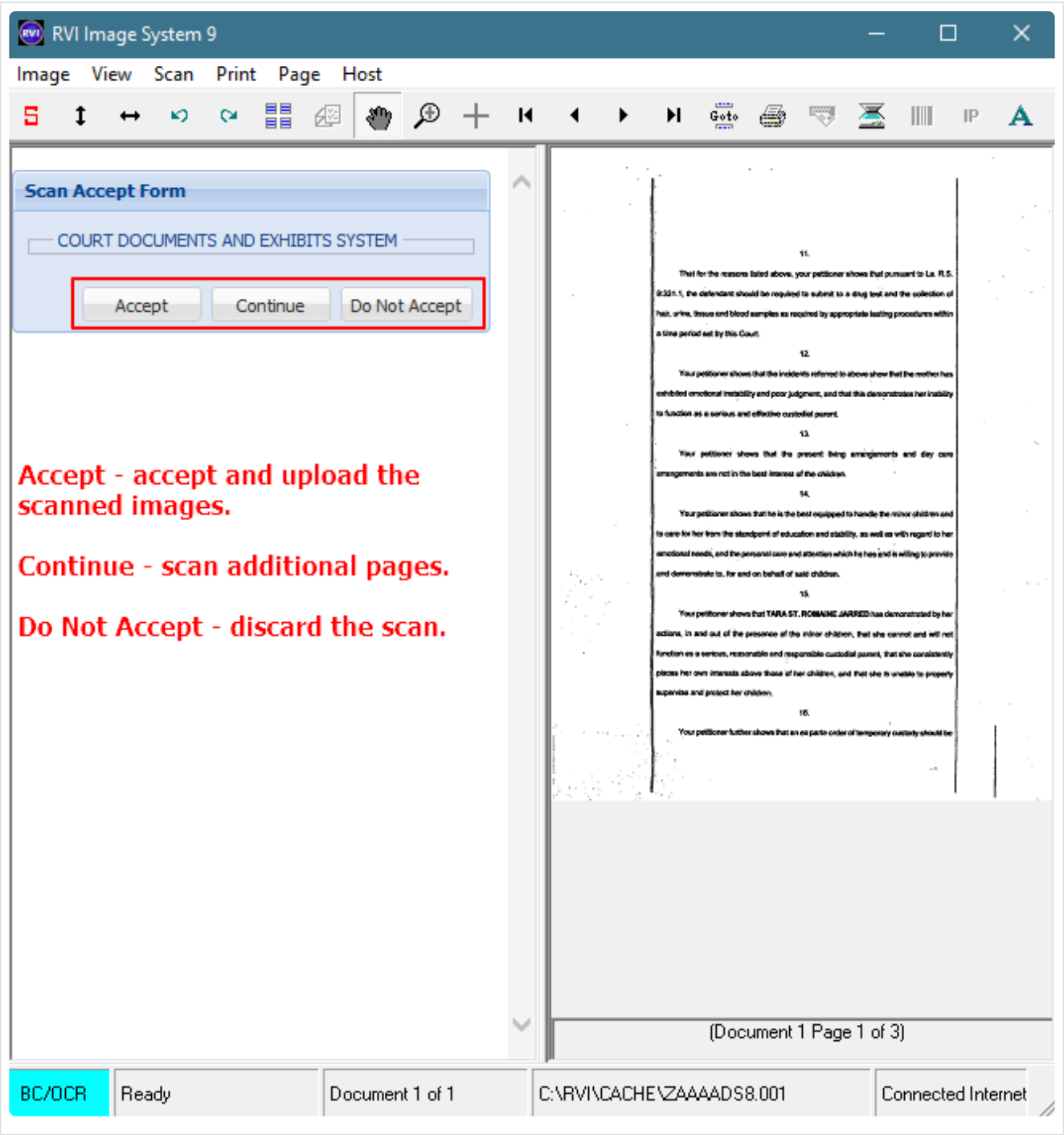


This will open the RVI PC Viewer. If the user is set to PC Control scanning, they will have to click Page or Batch to begin the scan process. If the user is set to host control, the scanning will automatically begin.

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

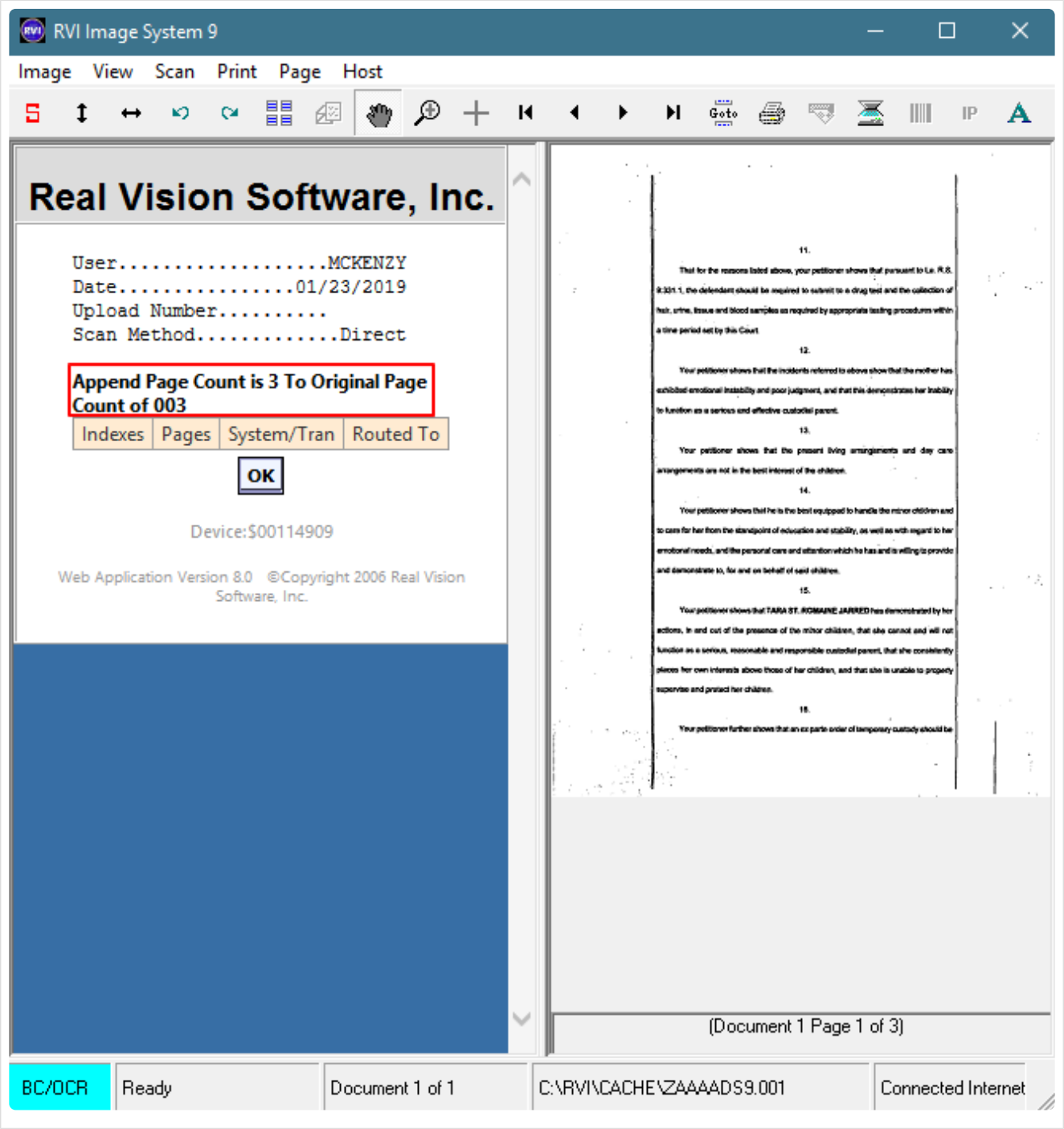


4. Click **Accept**, **Continue**, or **Do Not Accept**.



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

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



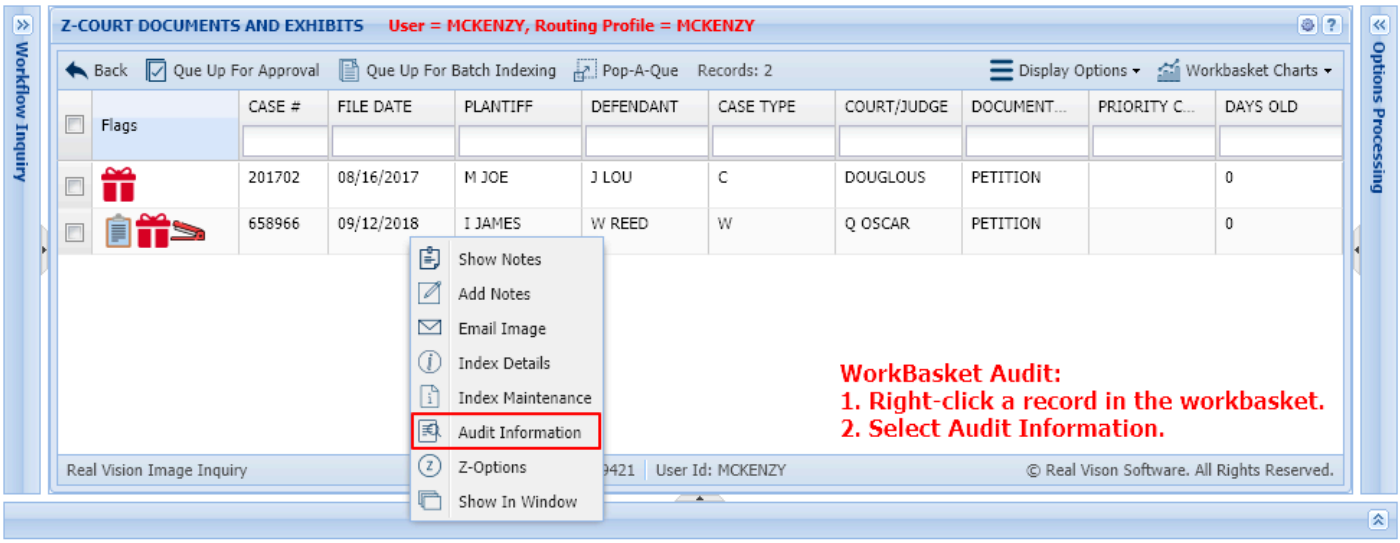
8.3. Audit

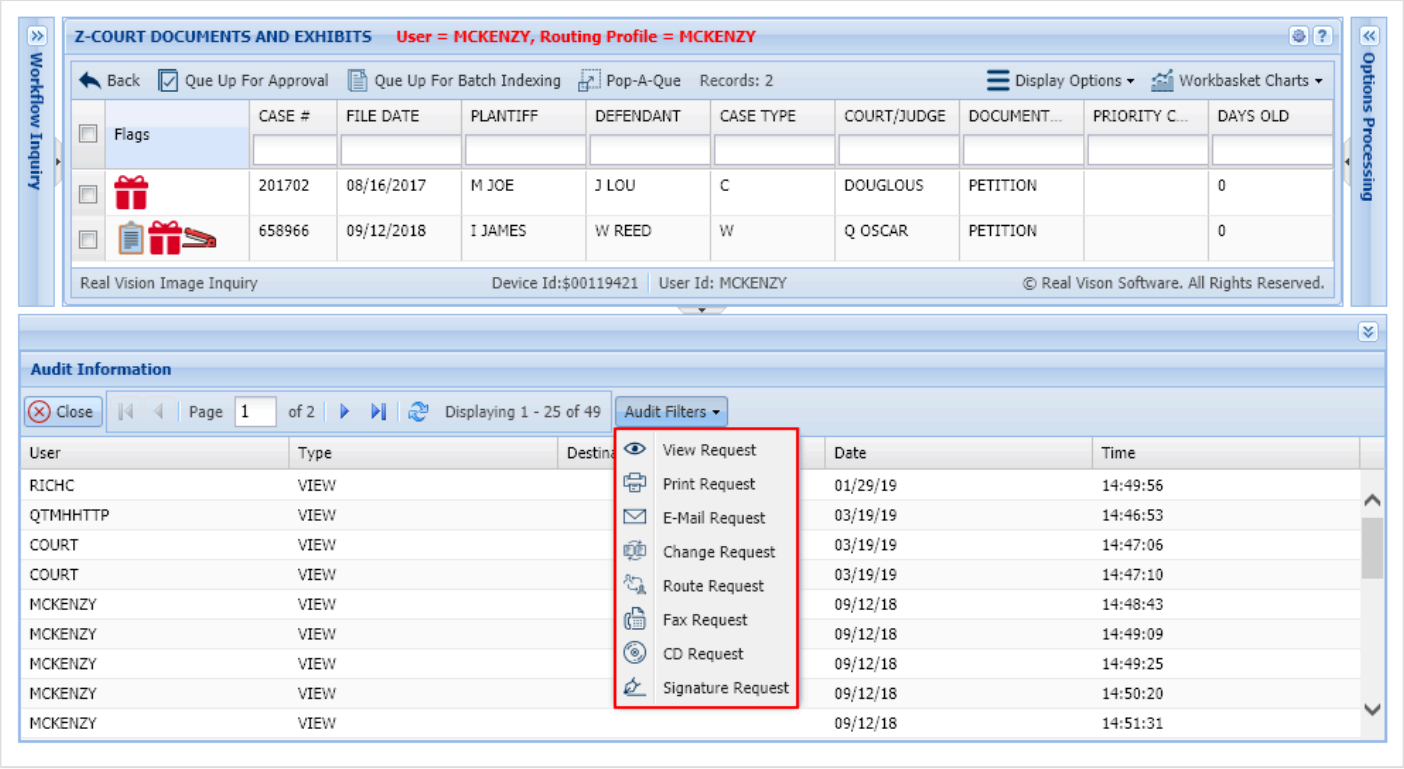
Audit is available in WorkBaskets and Image Inquiry.

WorkBasket Audit

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

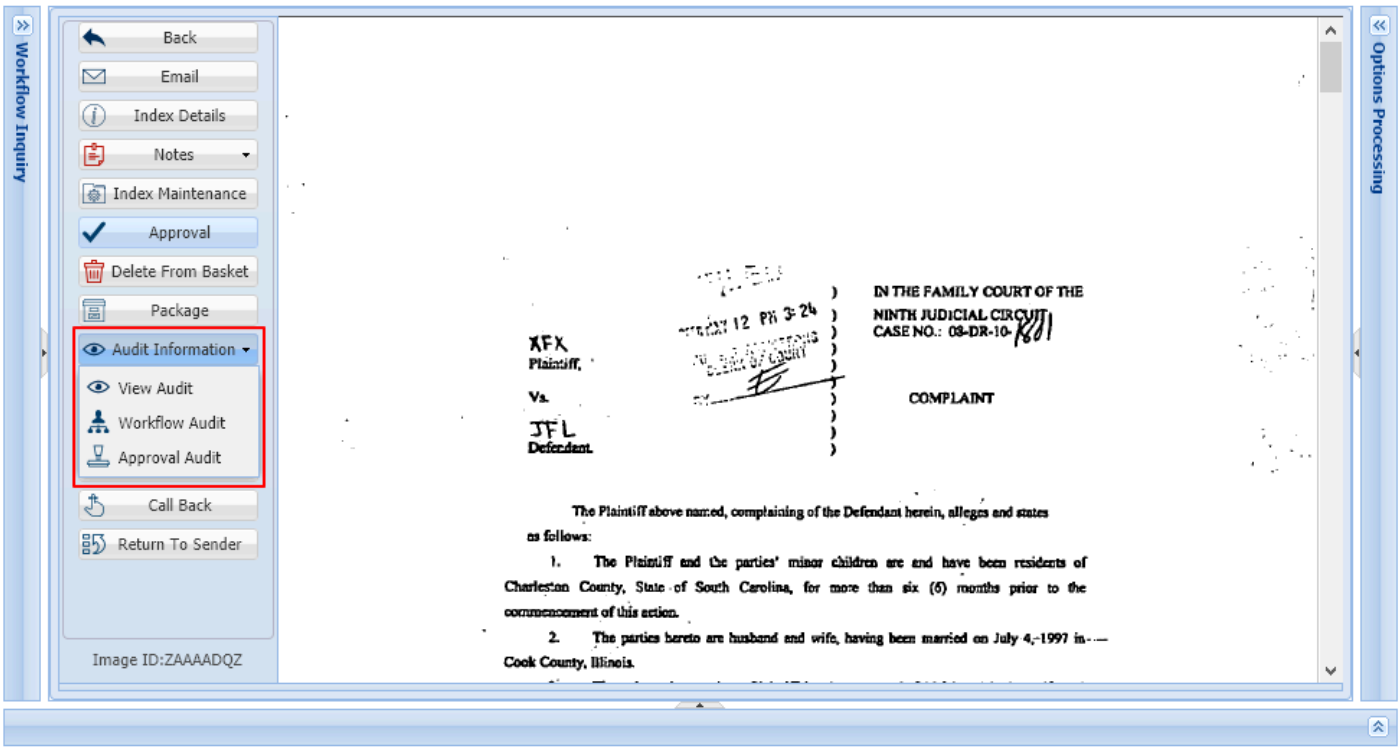
Click on the desired batch to be worked, then left-mouse click a record, select Audit Information to open the audit pane. Here you will find Audit Filters which allows the user to select the desired filter for the audit results.



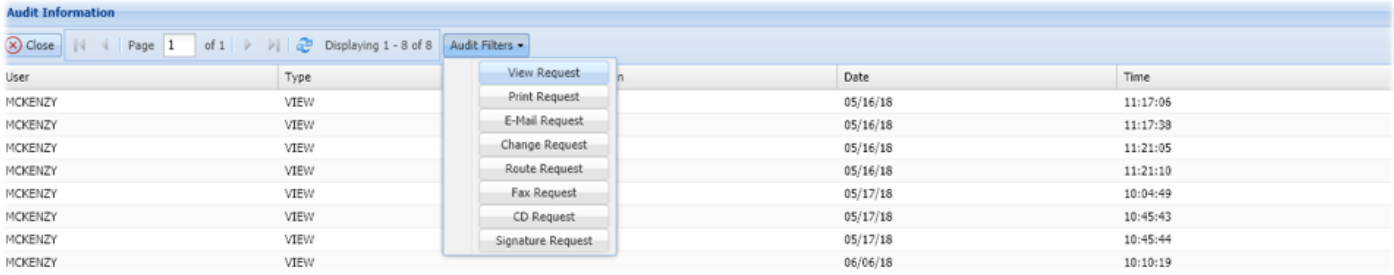


OR

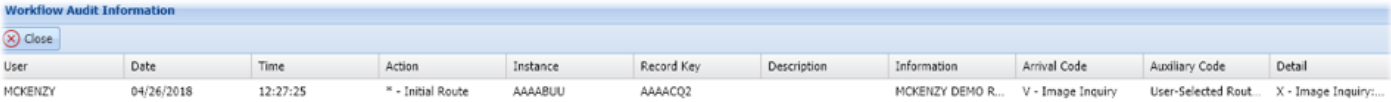
Double-click a record to display a document. The audit options are found at the bottom left hand corner of the screen.



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



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



to display the results of the approval process(es) associated with the document being viewed.

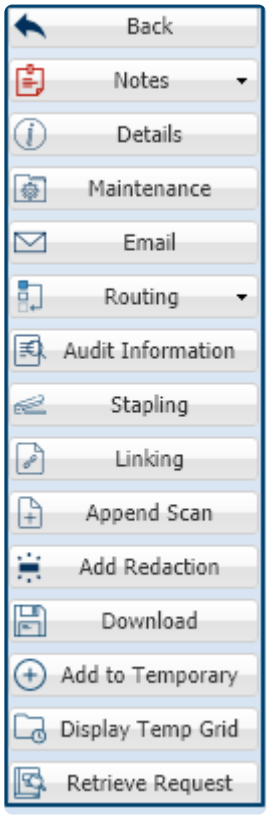
Workflow Audit Information

Close

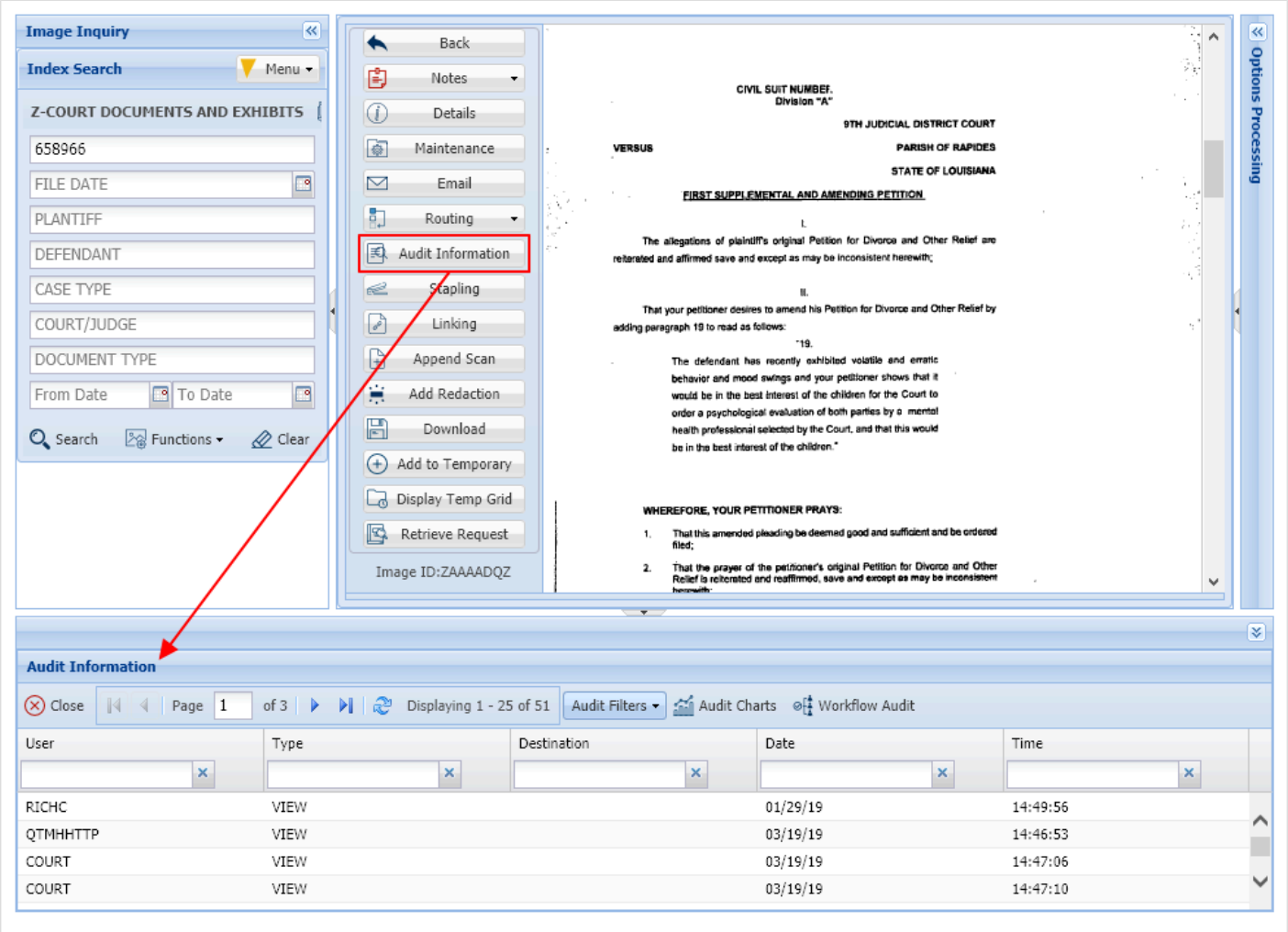
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail
LEN	03/12/2018	13:24:57	K - Apprv/Disaprv	AAAABSY	AAAACMP	APPROVED	APPROVED	W - Workbasket In...		- ADDITIONAL INF...
LEN	03/12/2018	13:24:58	K - Apprv/Disaprv	AAAABSY	AAAACMP			W - Workbasket In...	Routing 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

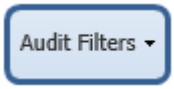
To access the available audits, double click a record from the display pane sub file list. When the document is displayed, the user will be presented with the Display & Left Side Functions. Select the Audit Information button.



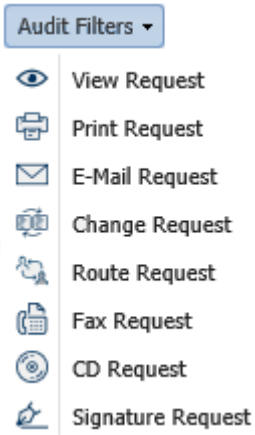
The audit information frame will open below the displayed document.



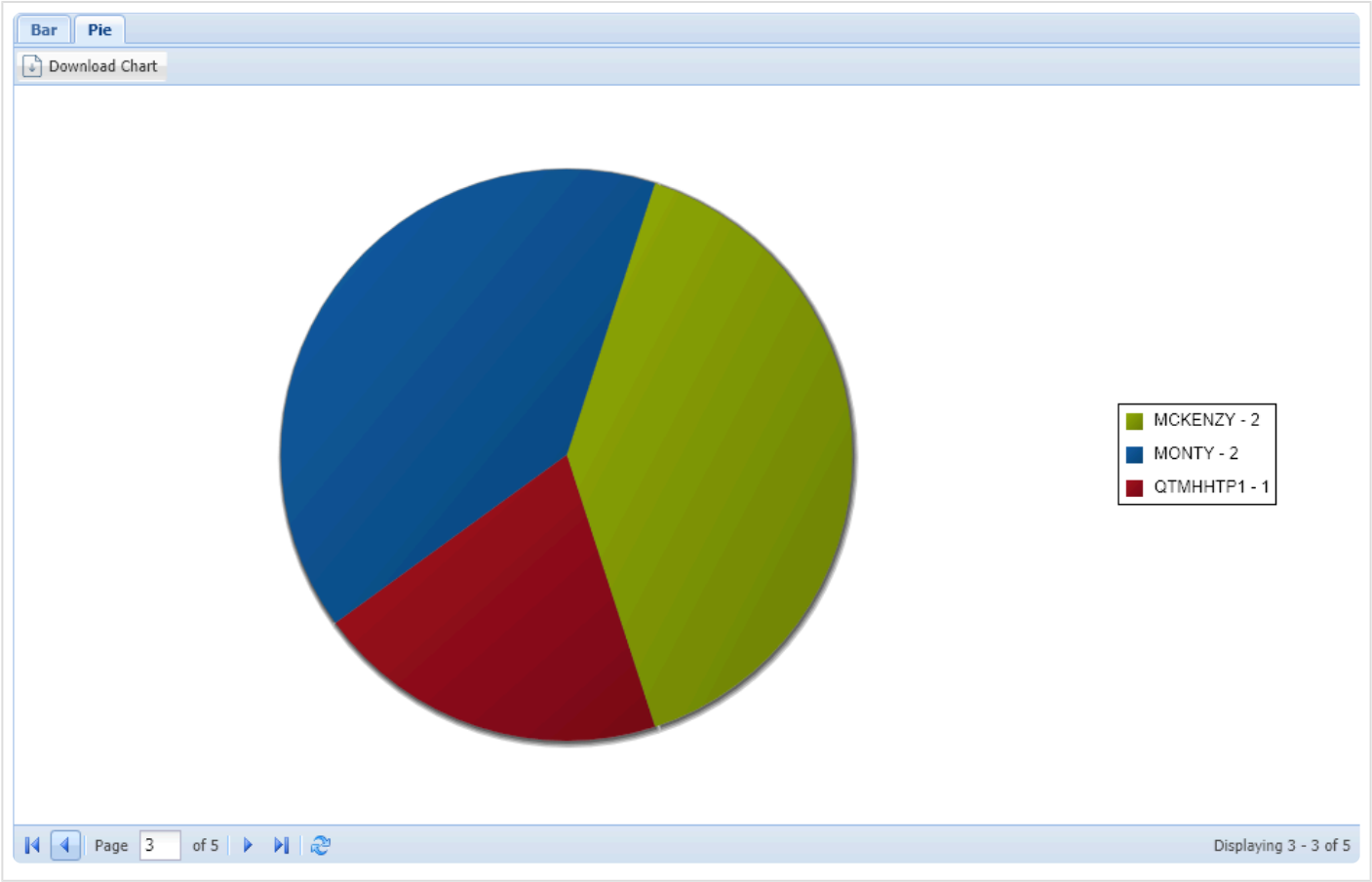
Audit Information Options:



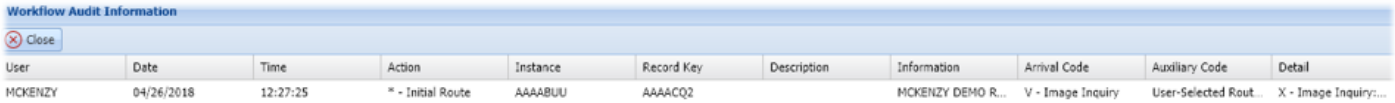
to select the desired request type to be queried. By default, the audit request type is set to *View Request*.



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



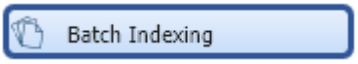
to display the associated workflow audit associated with the document being viewed.



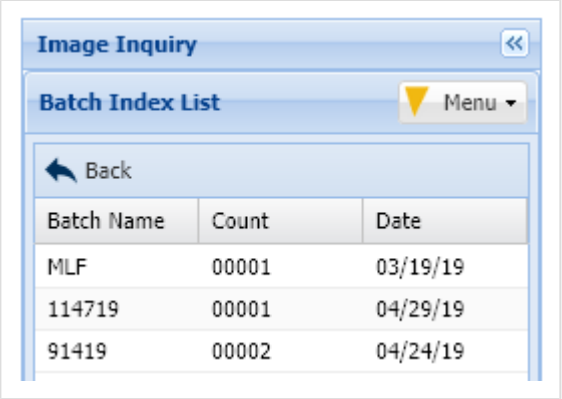
User	Date	Time	Action	Instance	Record Key	Description	Information	Arrival Code	Auxiliary Code	Detail
MCKENZY	04/26/2018	12:27:25	* - Initial Route	AAAABUU	AAAACQ2		MCKENZY DEMO R...	V - Image Inquiry	User-Selected Rout...	X - Image Inquiry:...

8.4. Batch Indexing

1. Select

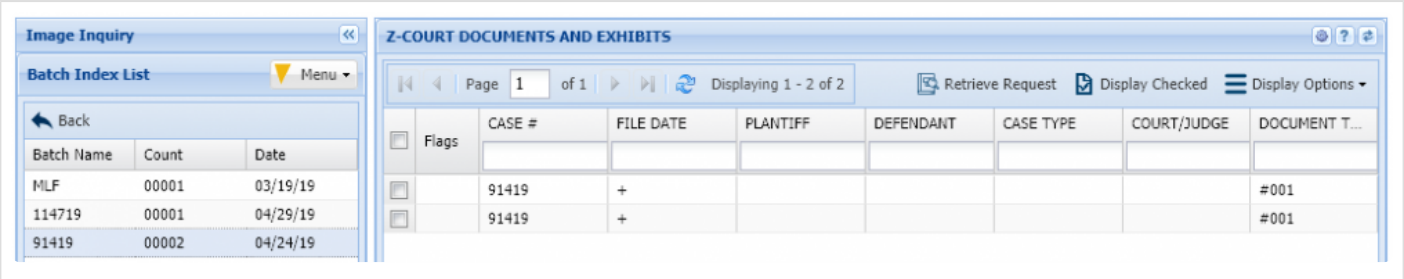
2. Choose 

3. Single mouse click the batch to be worked.

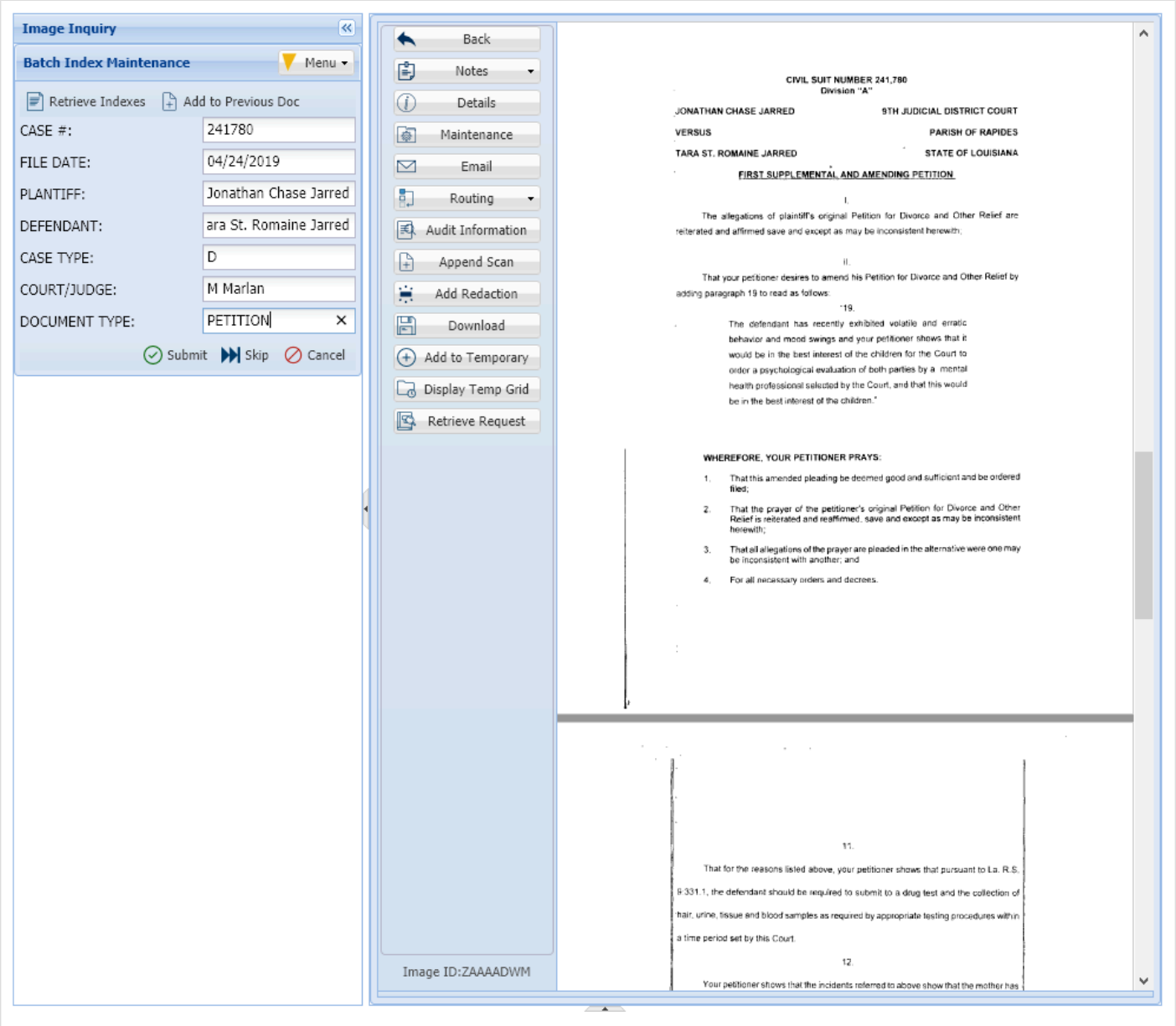


4. Double click the first image in the batch.

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



5. Index the image.



6. Click to save the index values.

OR

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

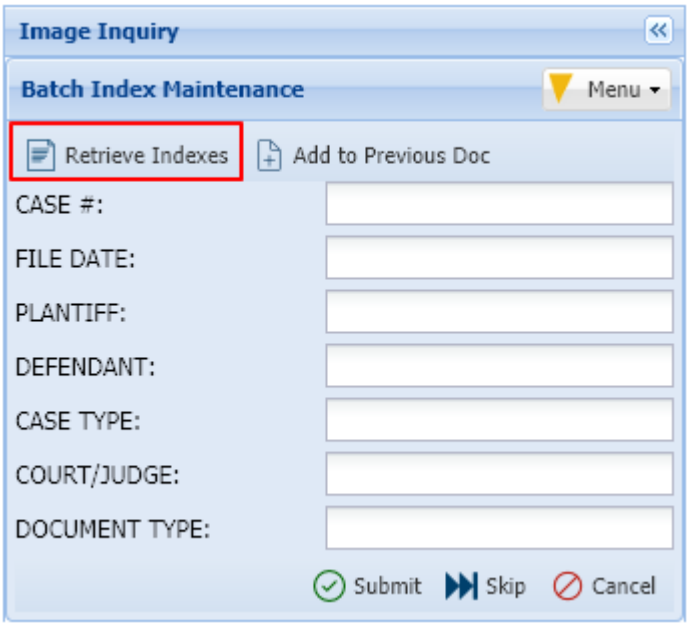
8.4.1. Retrieve Indexes

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.

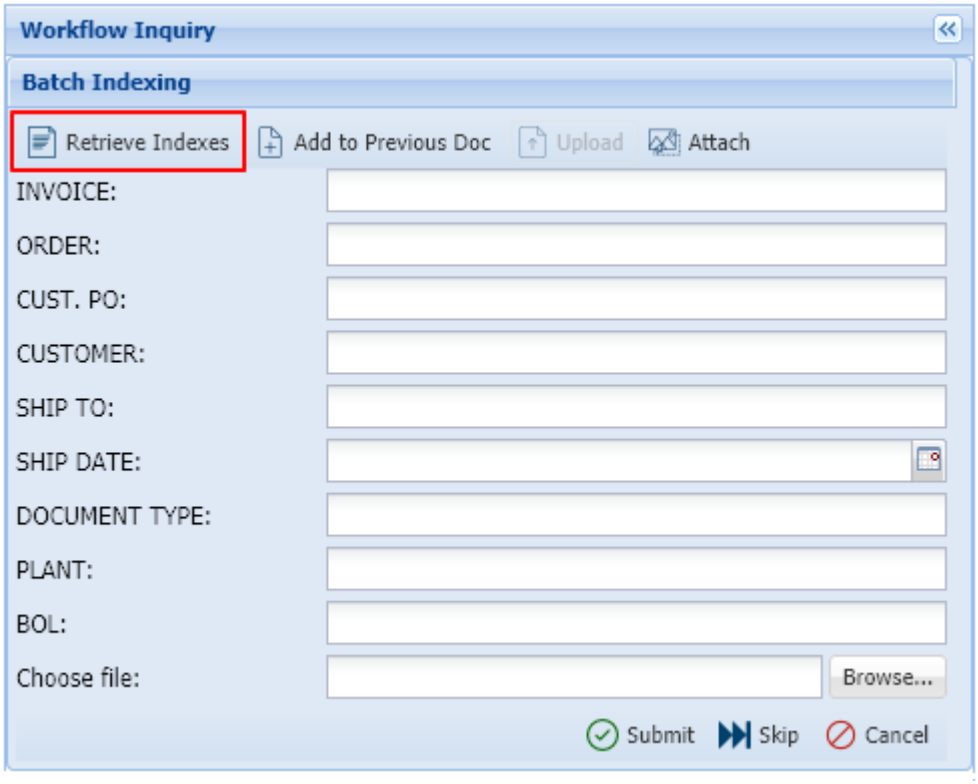
When Retrieve Indexes and Retrieve Request buttons are both present on the indexing screen, they can be used interchangeably. Either button will perform the index information retrieval from the customer database.

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

Image Inquiry:



WorkBasket:

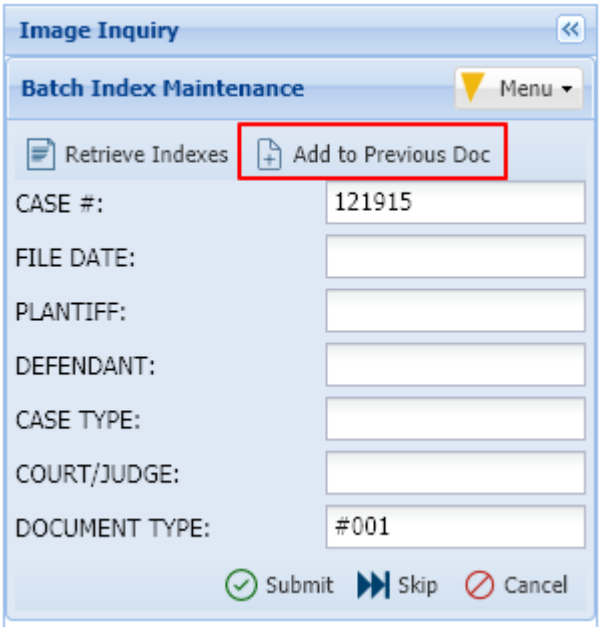


8.4.2. Add To Previous Doc

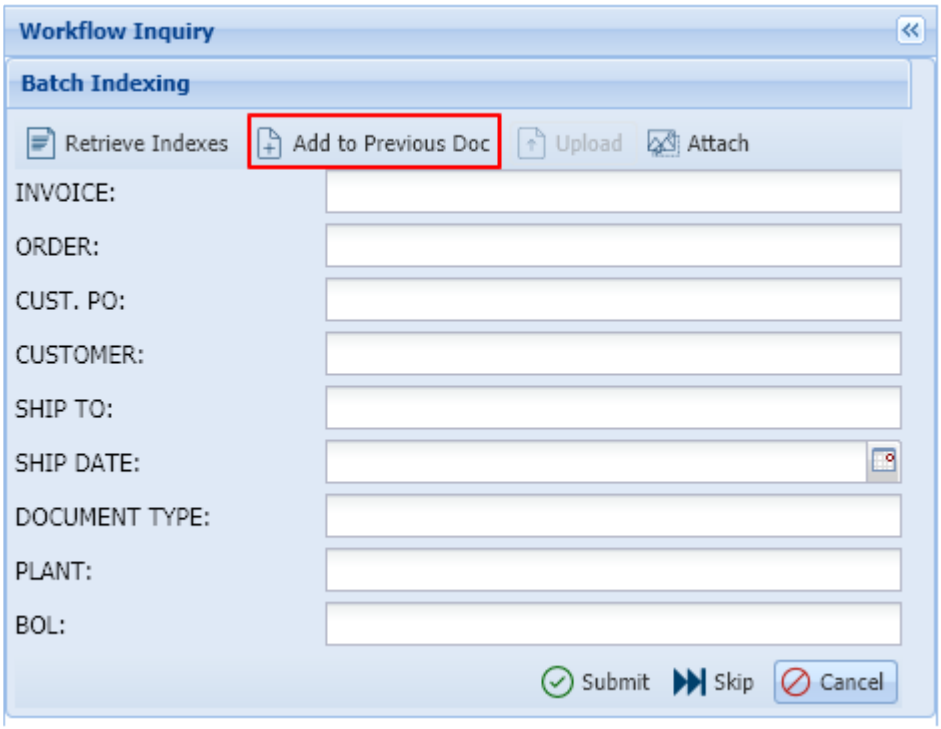
Allows the user to append the image currently displayed to the previously indexed document. The current document will be appended and removed from the batch indexing queue.

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

Image Inquiry:



WorkBasket:

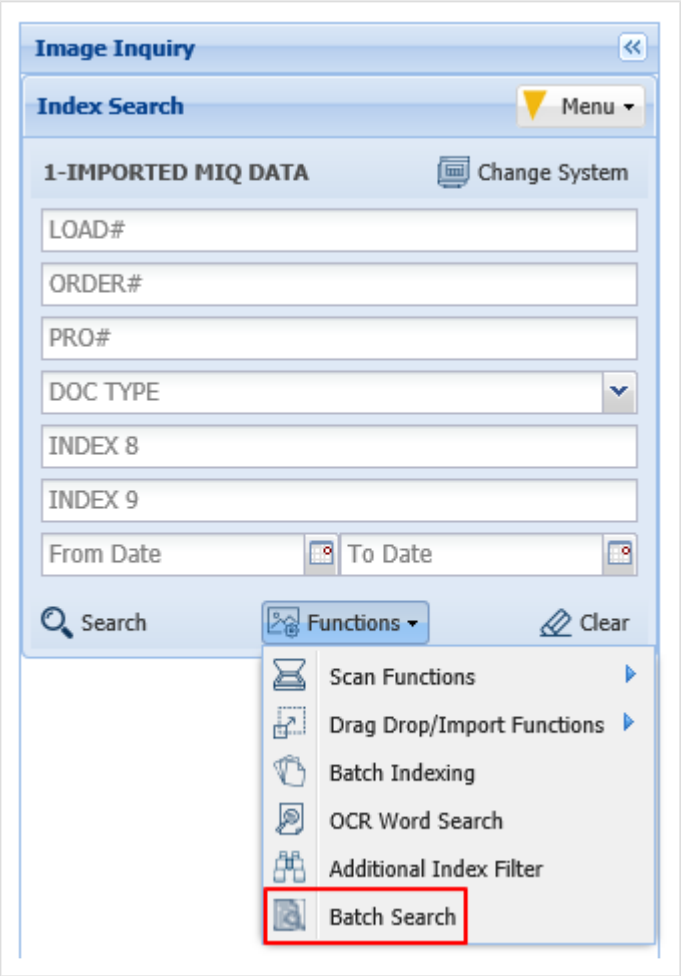


8.5. Batch Search

To watch a video on this topic CLICK HERE.

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.



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.

3. **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.

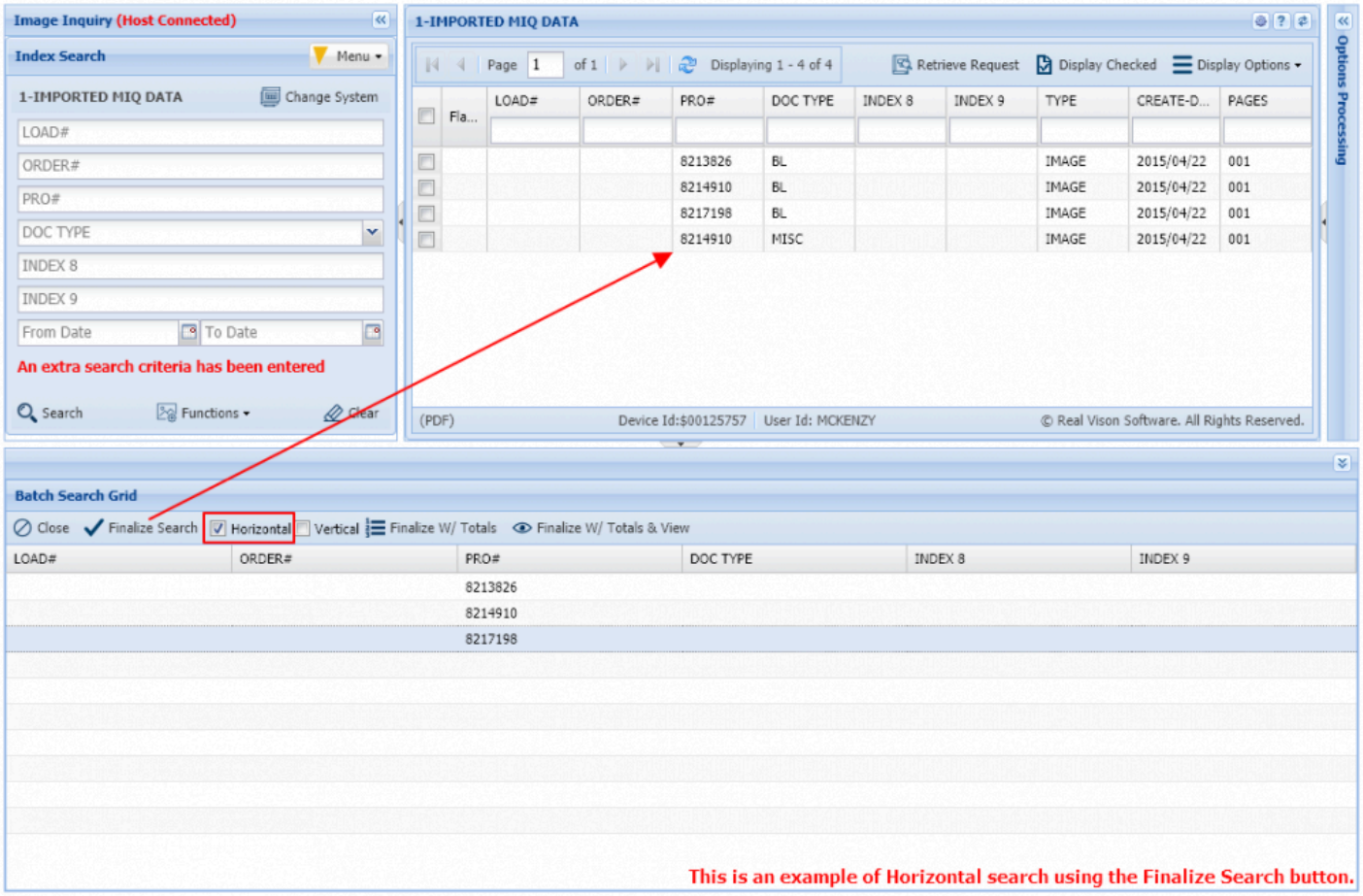
Horizontal Search:

Include an index record if:

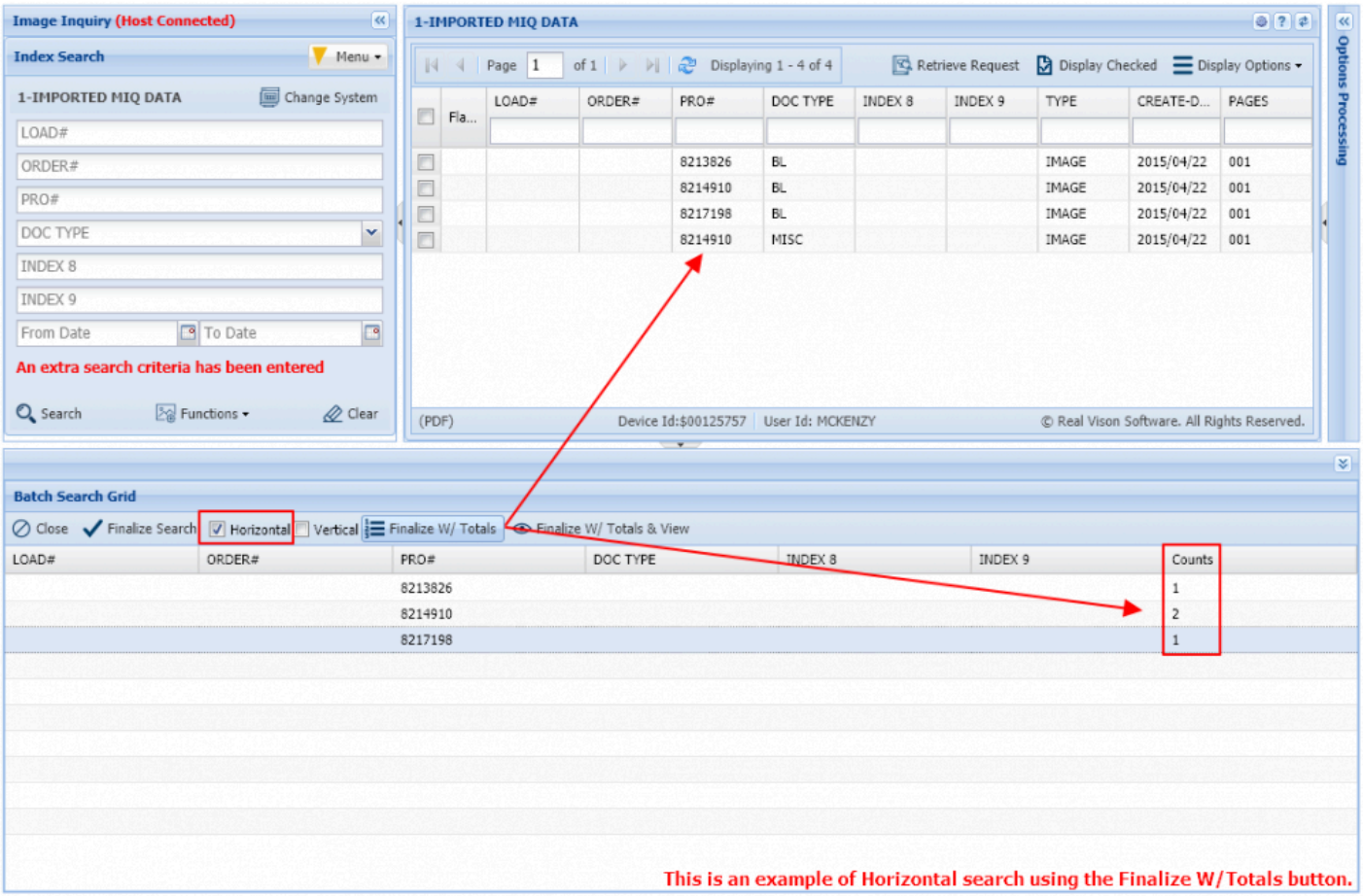
- All indexes from Row 1 match
  OR
- All indexes from Row 2 match
  OR
- All Indexes from Row 3 match

Continuing through ALL Grid Rows.

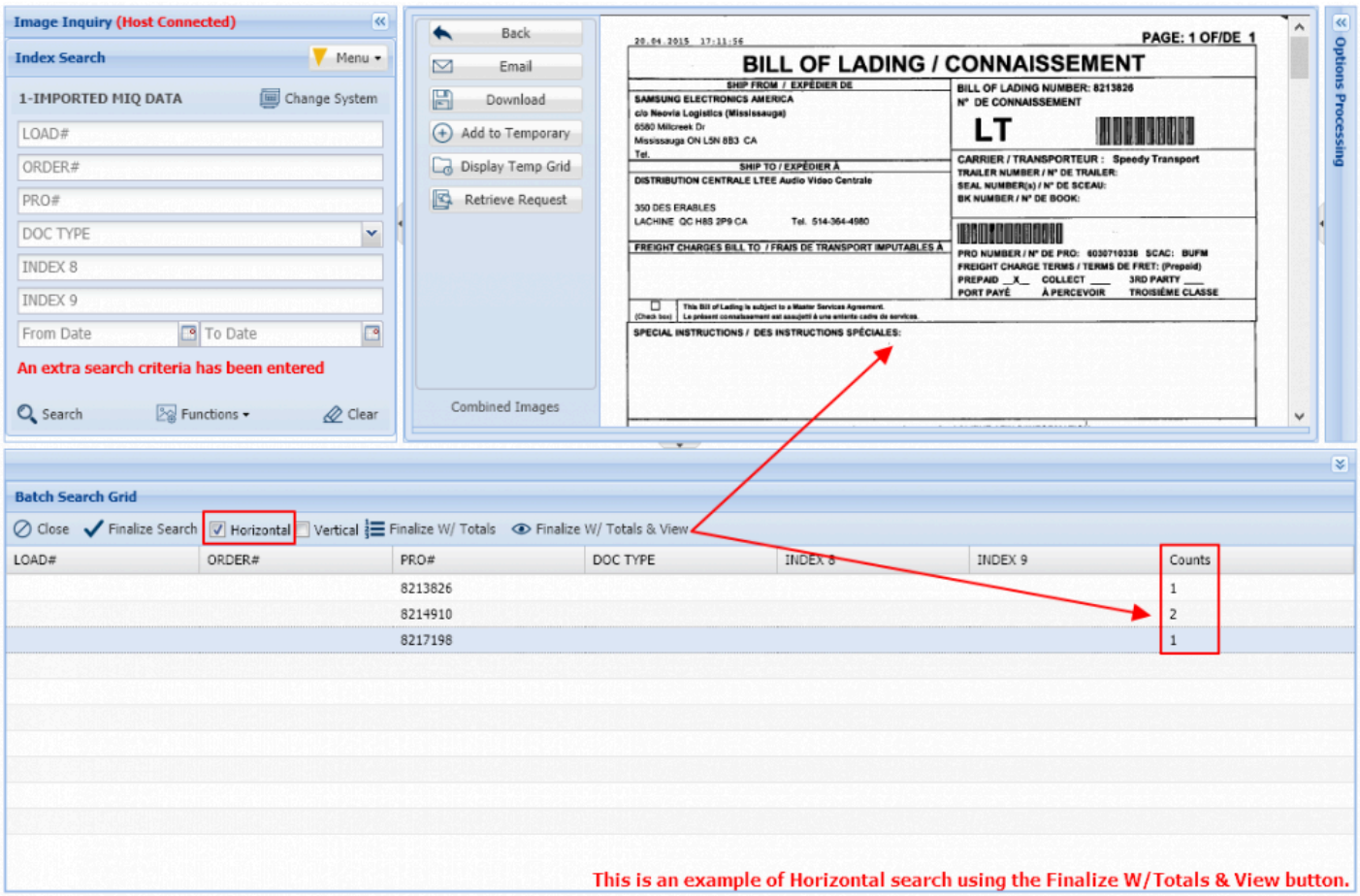
Example: Horizontal Search Using Finalize Search



Example: Horizontal Search Using Finalize W/Totals



Example: Horizontal Search Using Finalize W/Totals & View

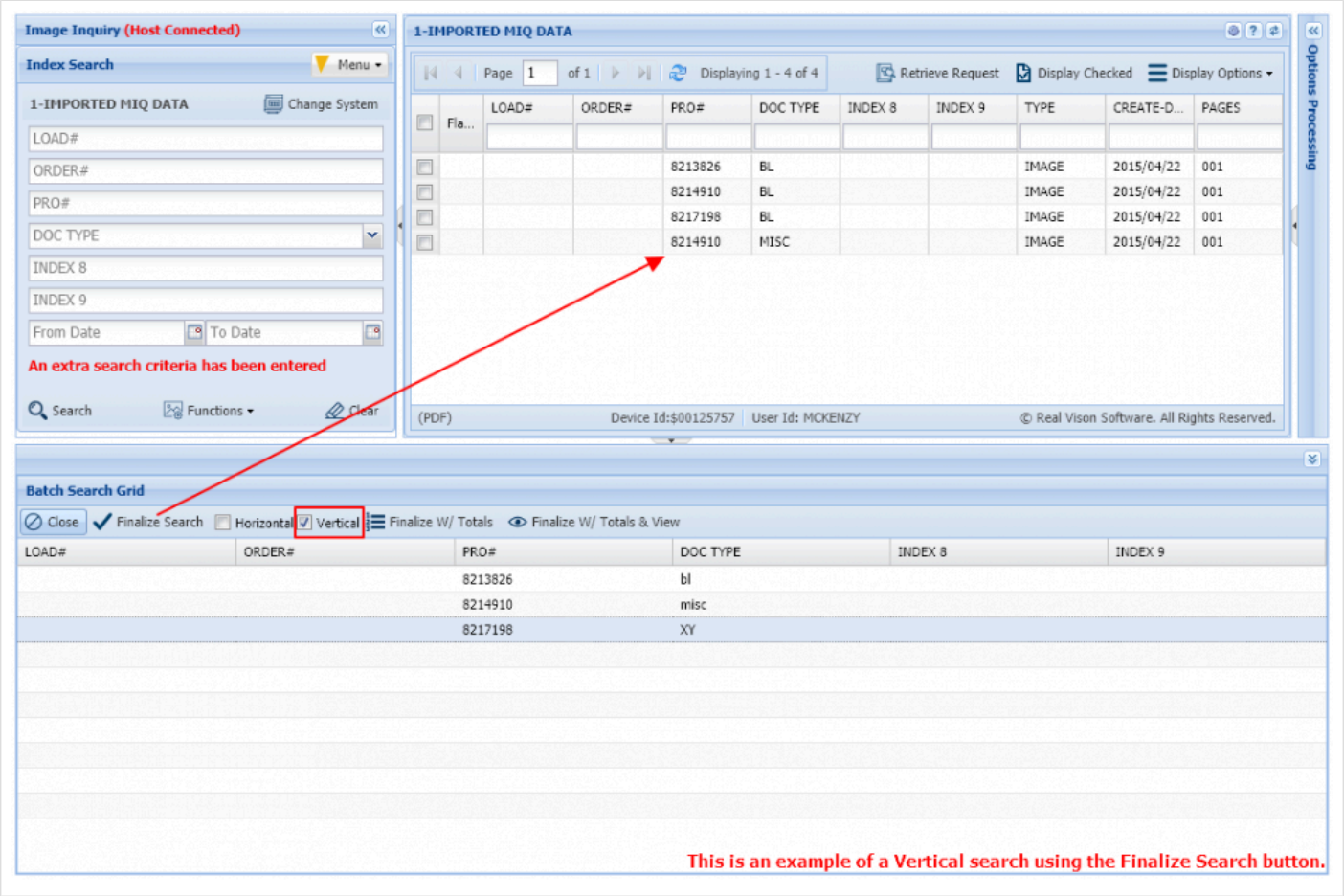


Vertical Search:

Include an index record if:

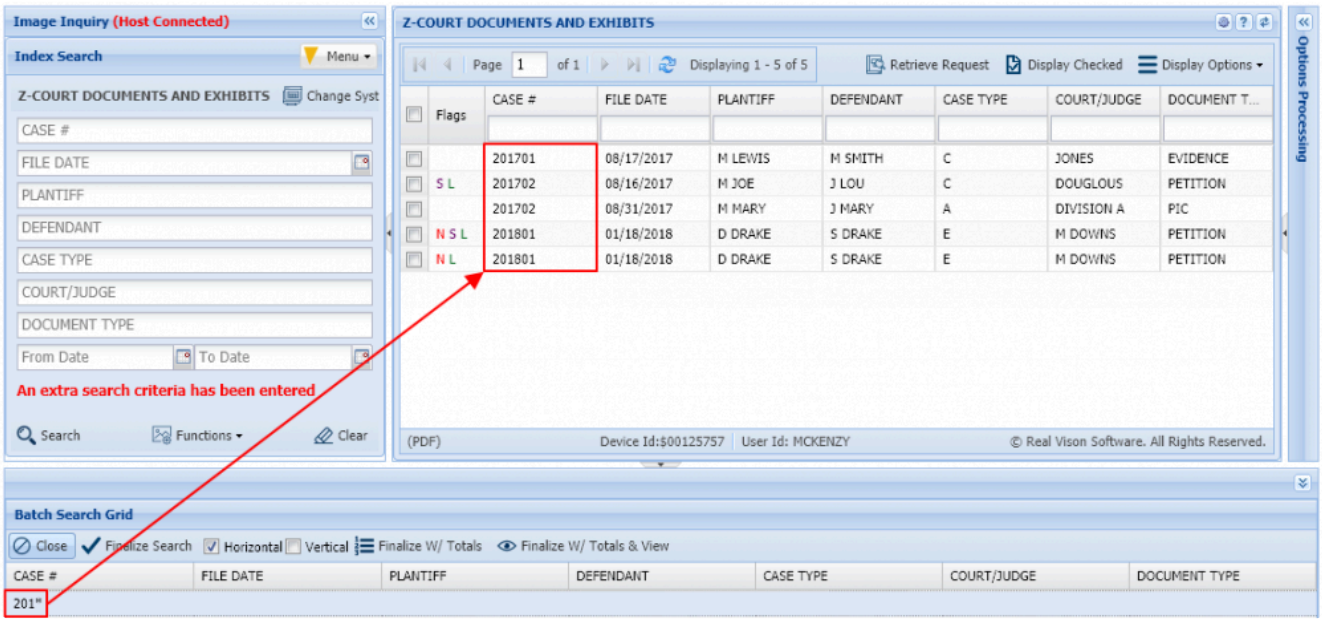
- Any indexes from Column 1 match
  AND
- Any indexes from Column 2 match
  AND
- Any Indexes from Column 3 match
  Continuing through ALL Grid Columns.

Example: Vertical Search Using Finalize Search

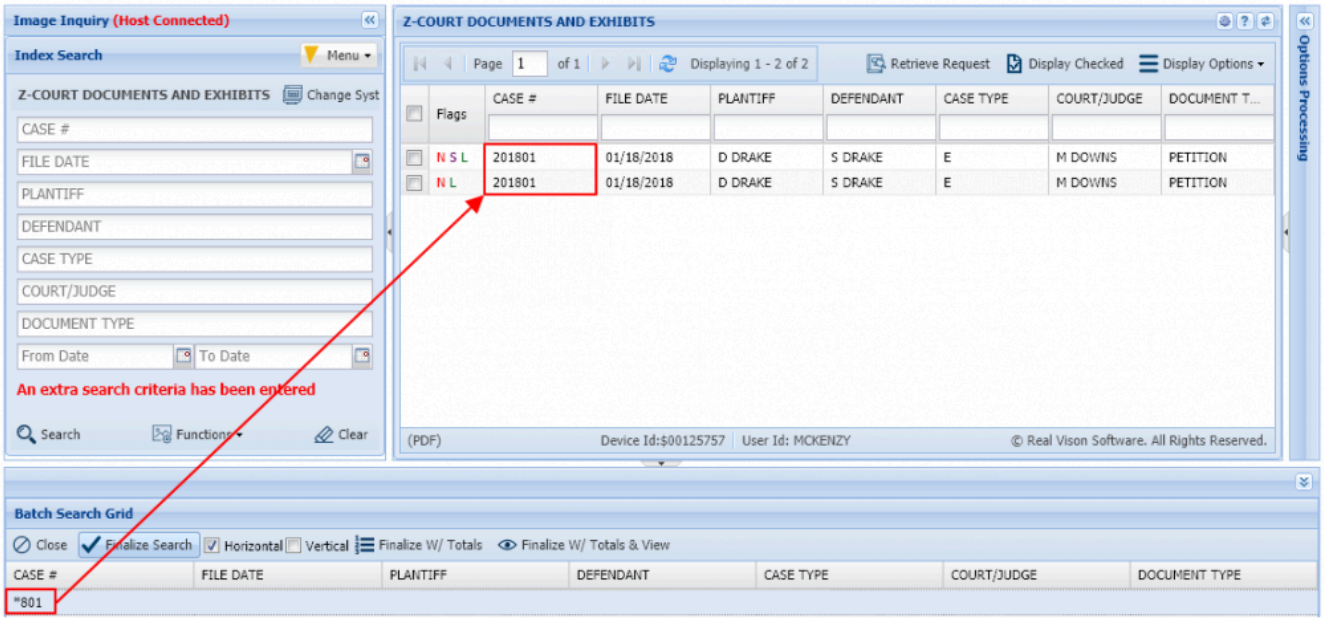


WildCard Search Example:

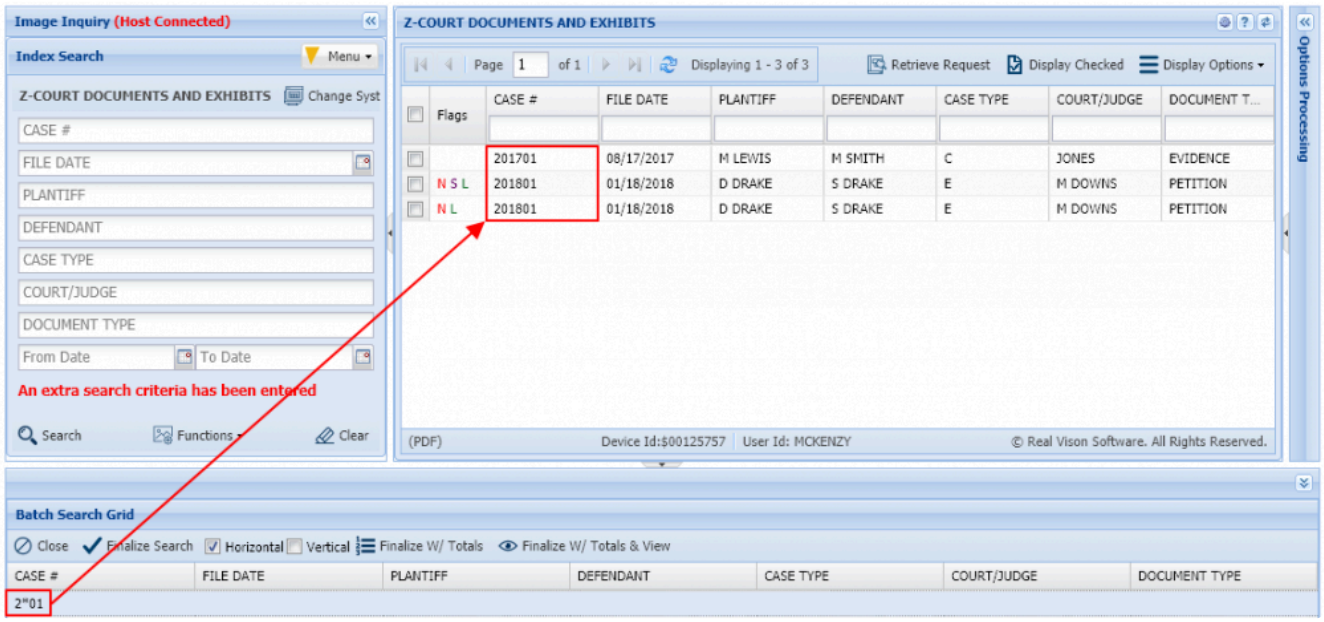
1. **Beginning Value:** Searching for all case numbers that begin with **201**.



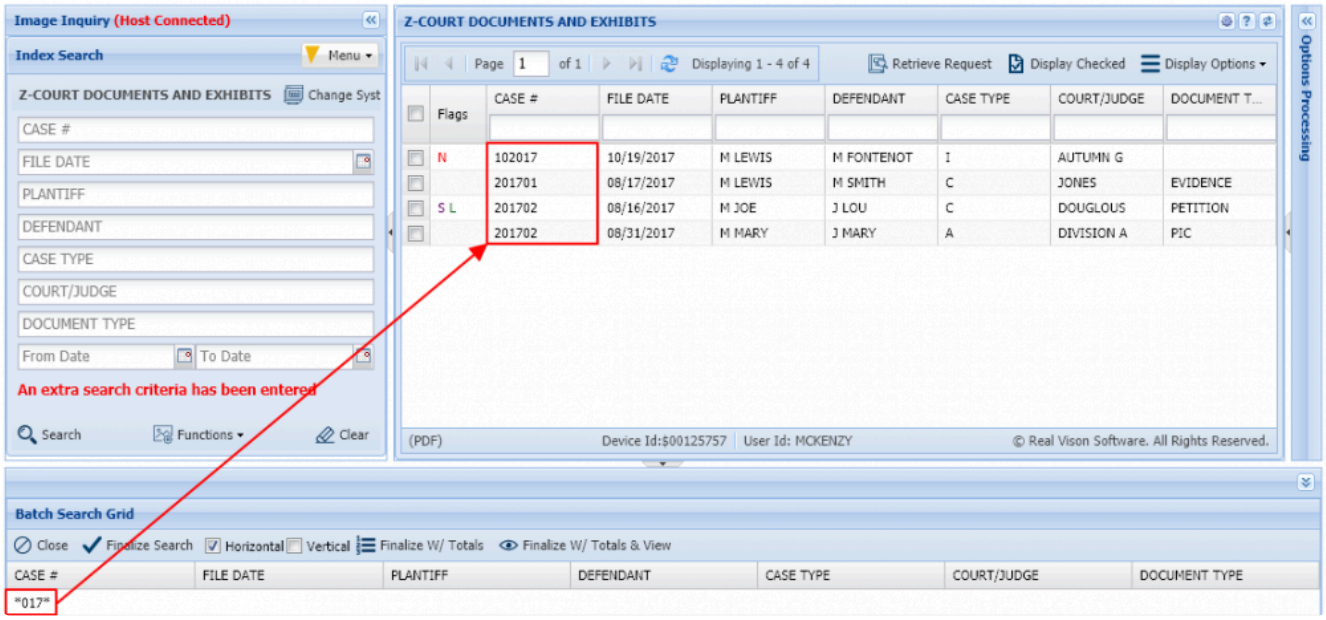
2. **Ending Value:** Search for all case numbers that end with **801**.



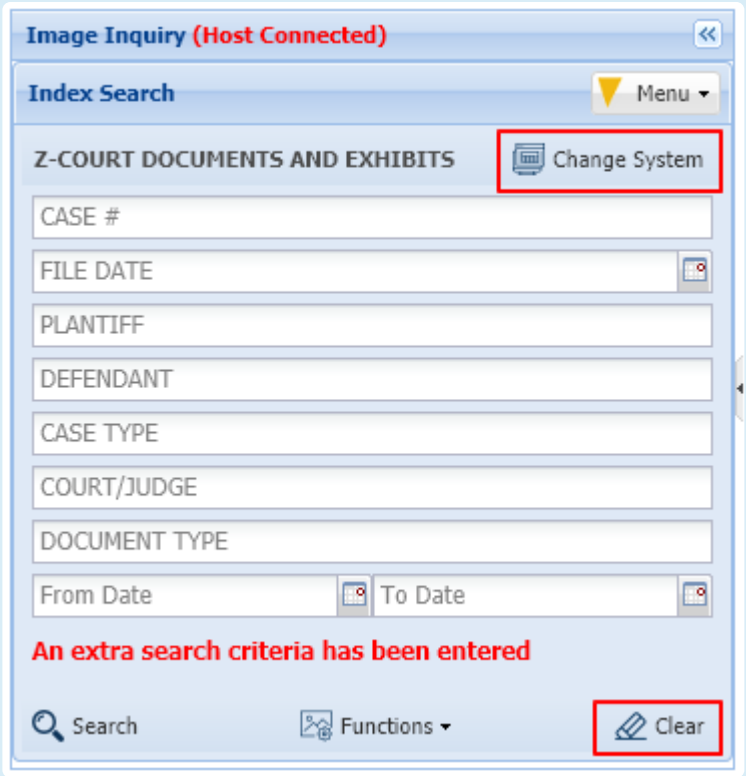
3. **Bookend Value:** Search for all case numbers that begin with **2** and end with **01**.



4. **Contained Value:** Search for all case numbers that contain **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.'



8.6. Drag Drop/Import

To watch a video on this topic CLICK HERE

1. Open the RVI PC viewer (RVI.EXE).

2. Drag and drop a file onto the RVI PC viewer window.

3. Verify the

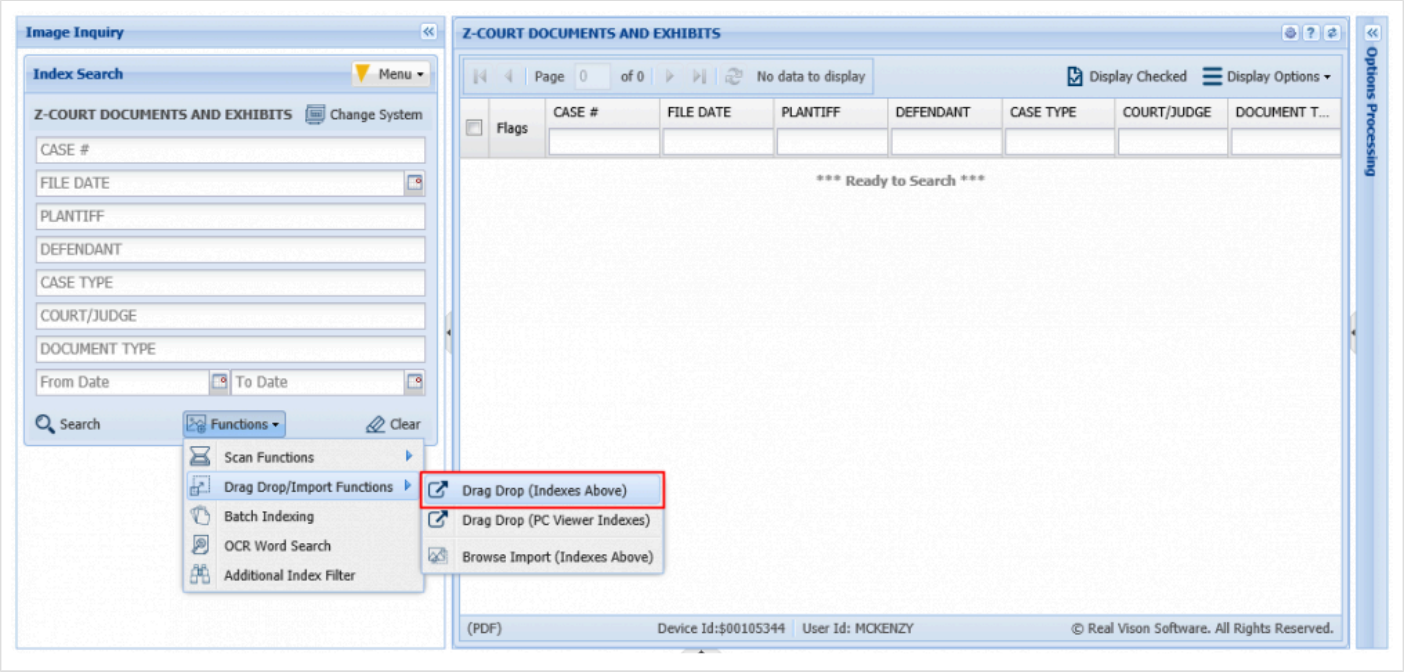
button in the bottom left hand corner of the RVI PC viewer is active.

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

> ! One Look requires the **RVI PC Viewer** for drag drop.

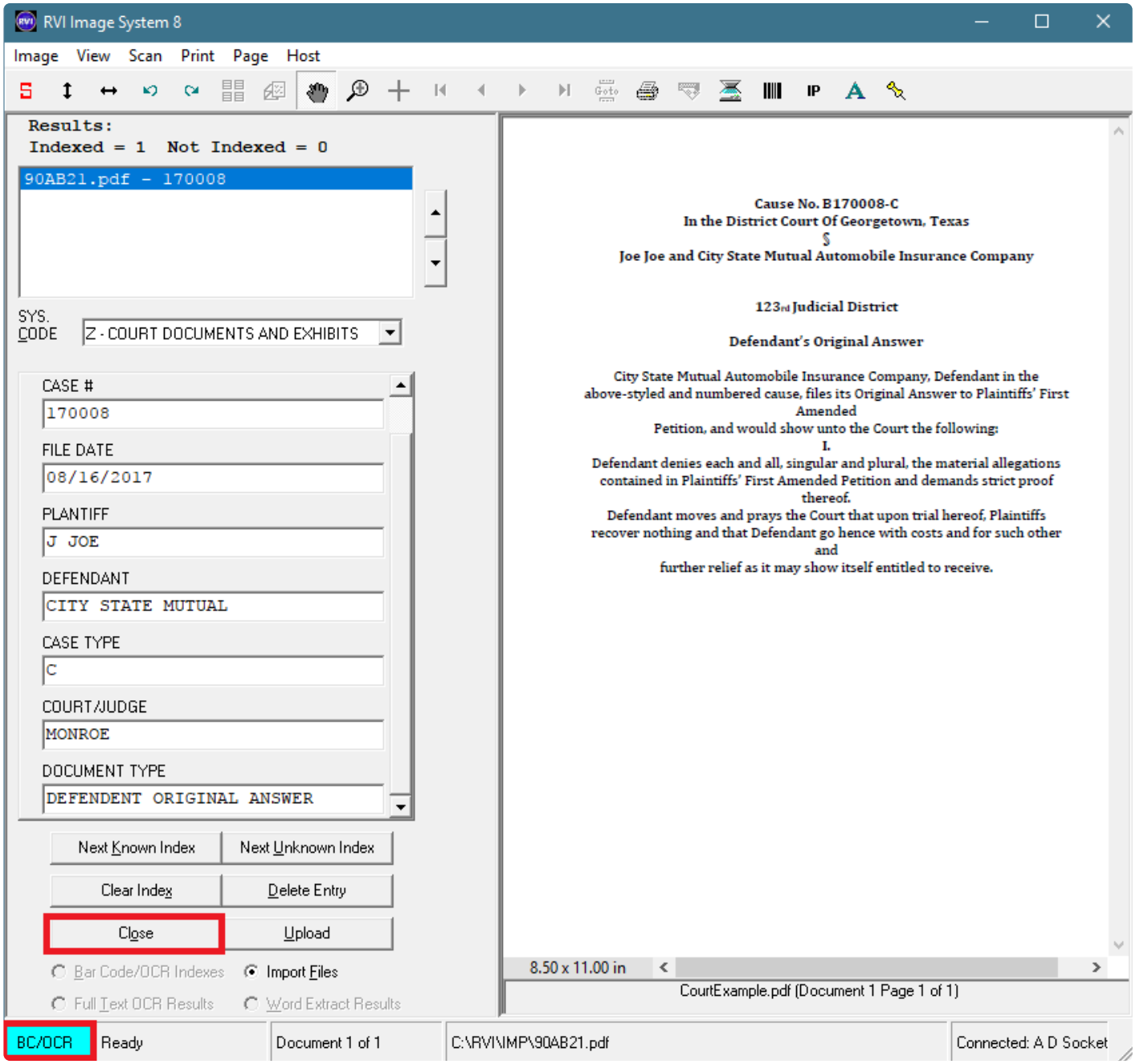
8.6.1. Drag Drop (Indexes Above)

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)**.



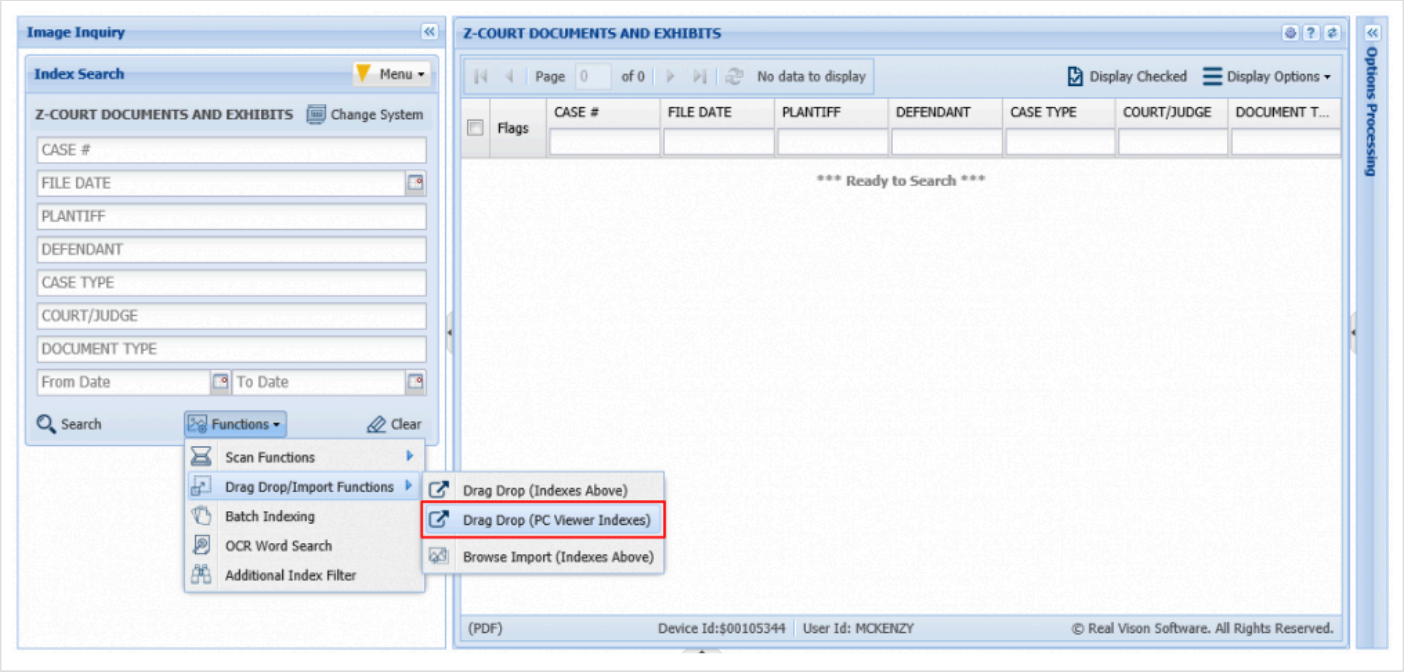
8.6.2. Drag Drop (PC Viewer Indexes)

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.



5. Navigate to One Look.

6. Select Functions, Drag Drop/Import Functions, **Drag Drop (PC Viewer Indexes)**.



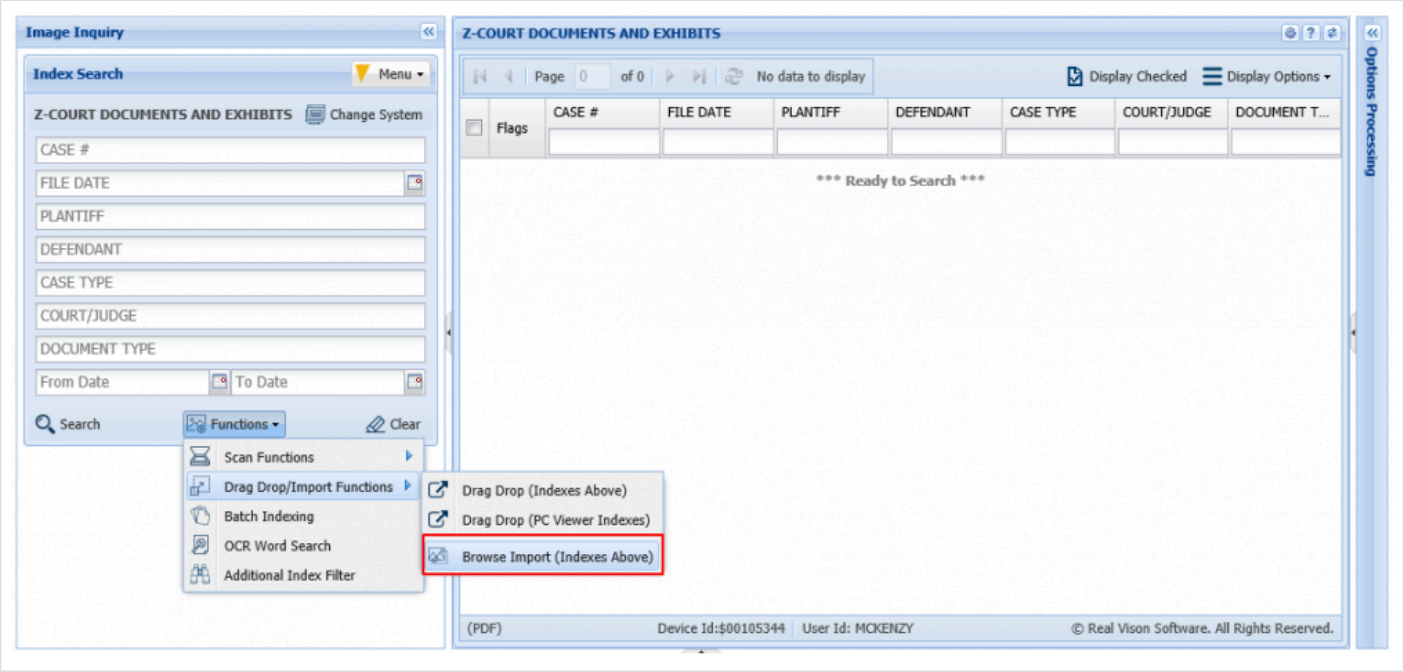
8.6.3. Browse Import (Indexes Above)

To watch a video on this topic CLICK HERE

From Image Inquiry:

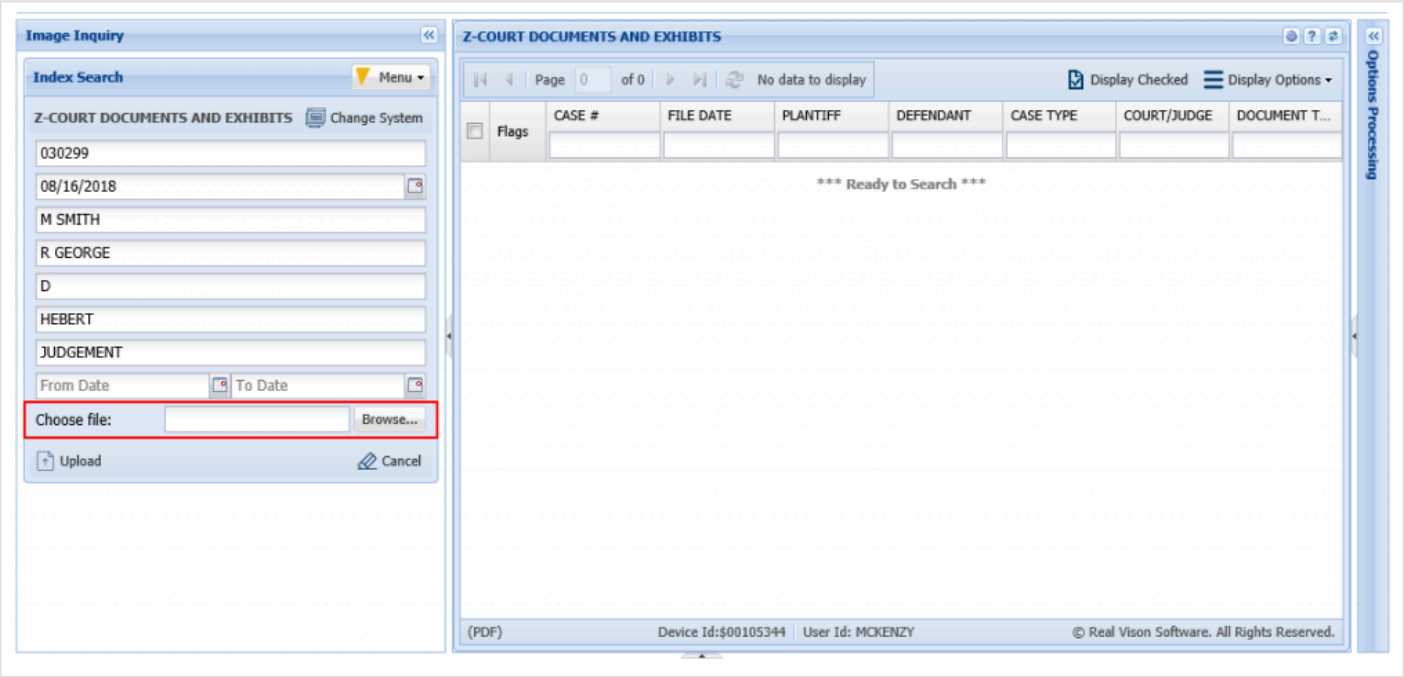
1. Enter the indexes values to be associated with the imported file.

2. Select Functions, Drag Drop/Import Functions, **Browse Import (Indexes Above)**.



3. Click the **Browse** button

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



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, 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 RVI 90 IBMi User Manual.

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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 RVI 90 IBMi User Manual for details on Document Tabs.

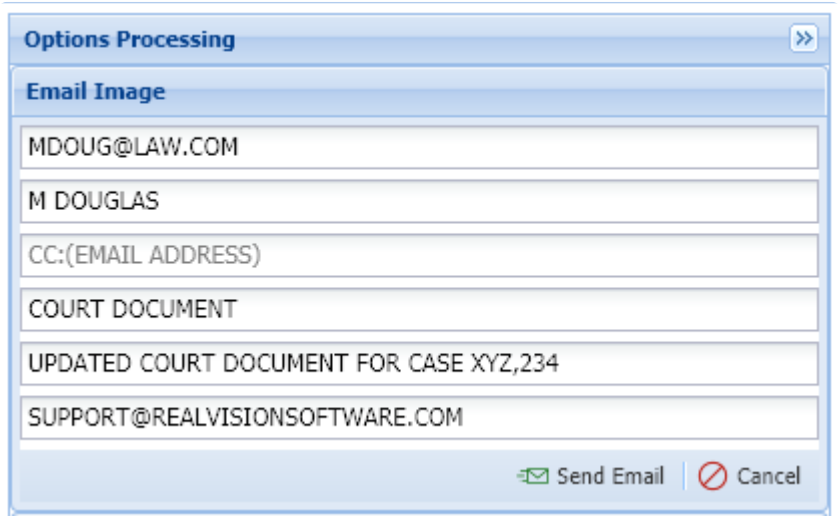
8.9. Email

1. Double click a record to view the image.

> When session settings 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.

2. Click

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

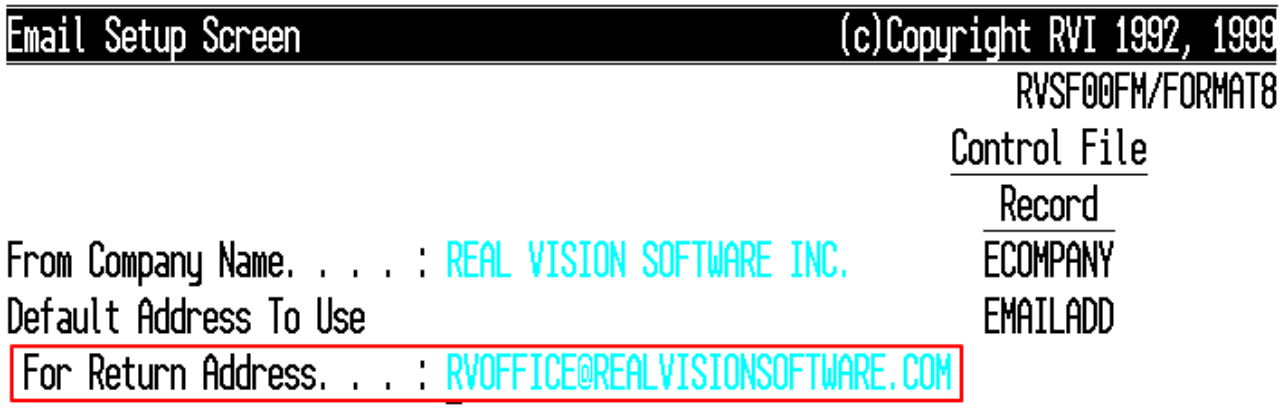


4. Click

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

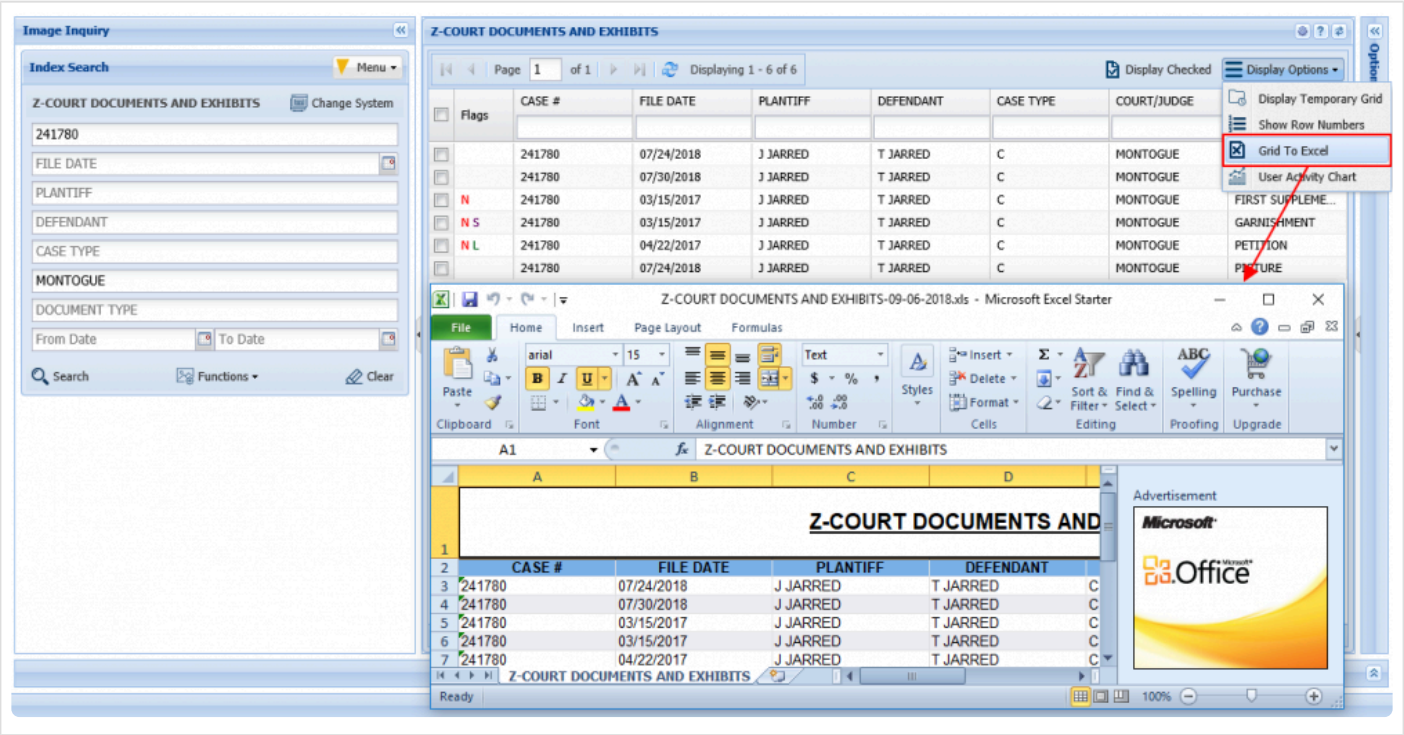
Optional Default Return Email Address Setup: (*Used when an originator email address is not found on the IBMi.*)
From a command line on the IBMi server, type **GO IMAGE** (*RVILIB must be in your library list*).

- 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.*



8.10. Export To Excel

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



8.11. Fax

Fax the document being viewed.

Contact Real Vision Software 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.

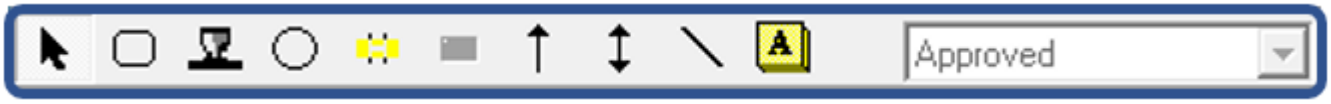
8.13. Image Markup

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.

> Setup One Look to view using the RVI PC Viewer for annotation. The user has the option of enabling RVI to Viewer or selecting the toggle button to switch between One Look (PDF) or RVI PC Viewer (Viewer).

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



	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.
	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.

	Point to an area of an image using a single arrow. Double click on the arrow button to add an “auto arrow” where the cursor is placed.
	Point to two simultaneous areas of an image using a double arrow.
	Add a line to an area of an image using the line tool.
	Add a note to an image using the on-image note editor.
Approved	Select from the list of possible stamps and add to the image using the Stamp Tool. Possible stamp tool values are Approved, Assigned, Checked, Copy, Draft, Extended, Fax, Faxed, Important, Invoice, Notice, Official, On File, Paid, Passed, Pending, Processed, Received, Rejected, Released, Sent, Shipped, Top Secret, Urgent, Void, Secret, Confidential, Client.

To add a markup:
Click the desired markup button.
Draw a rectangle around the desired area.

To modify markups:

Click the Select Cursor Tool , then click on the existing markup and make any needed modifications and deletions.

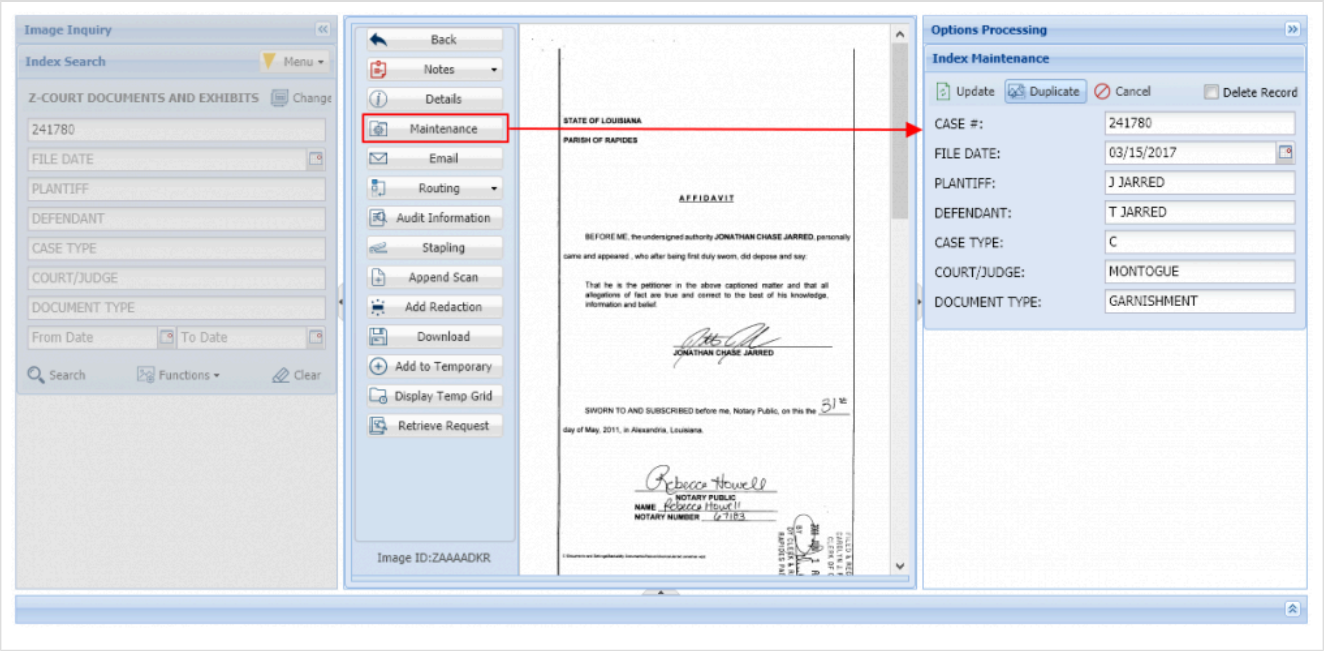
To save markups:
Click Image, Close in the top left hand corner of the RVI PC Viewer.

> Any user can add/modify markups unless restricted by securing option code 2 (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. Thiis 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.



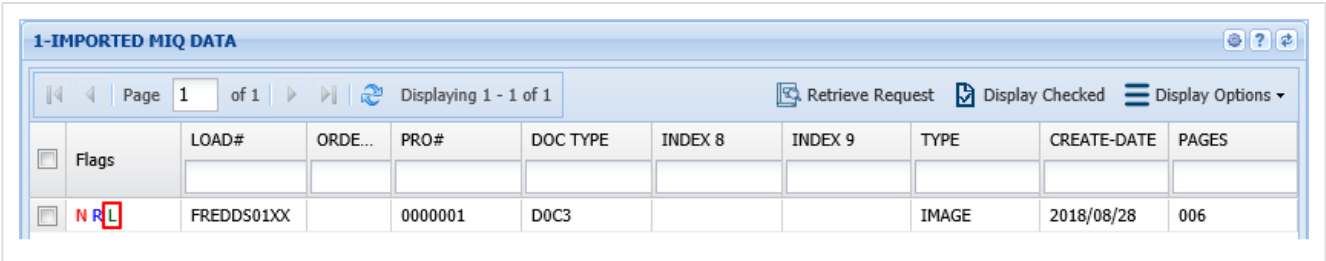
8.15. Linking

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.*)

<u>If the document's indexes satisfy a linking rule that is setup for this image system:</u>

- The system will display L next to the record.



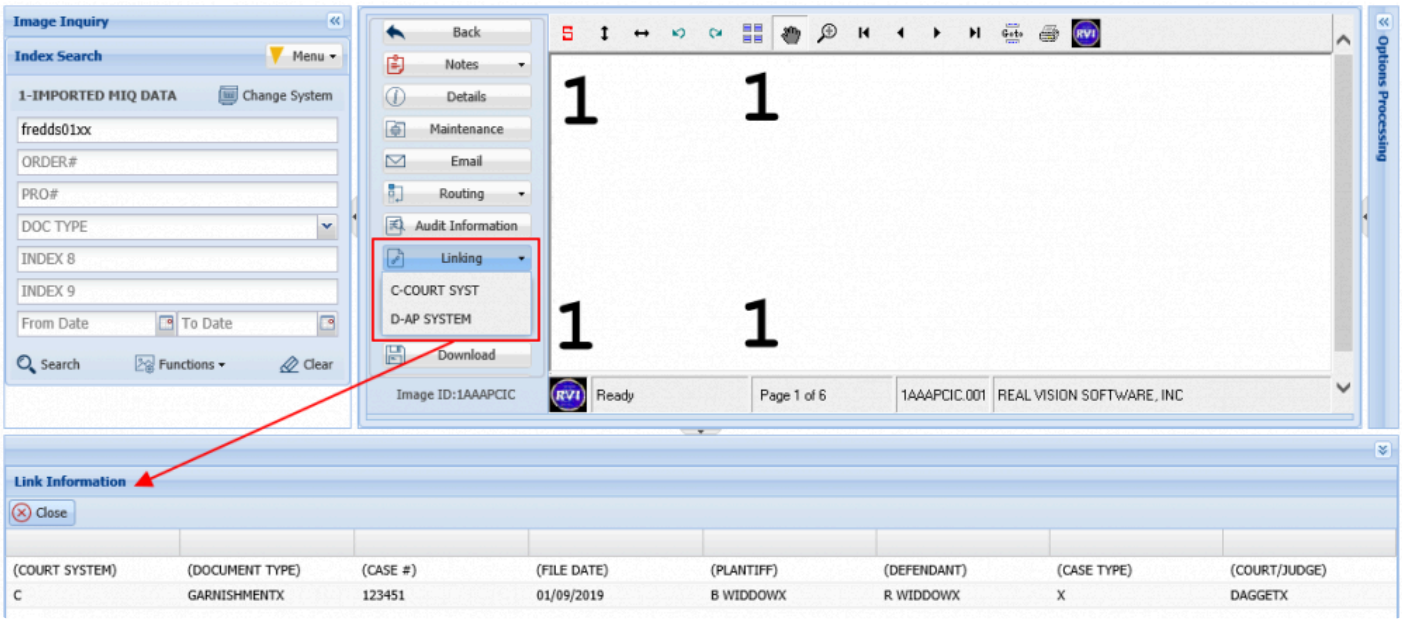
Two options to access Linking:

Option 1:

- When you view the document, click

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.



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

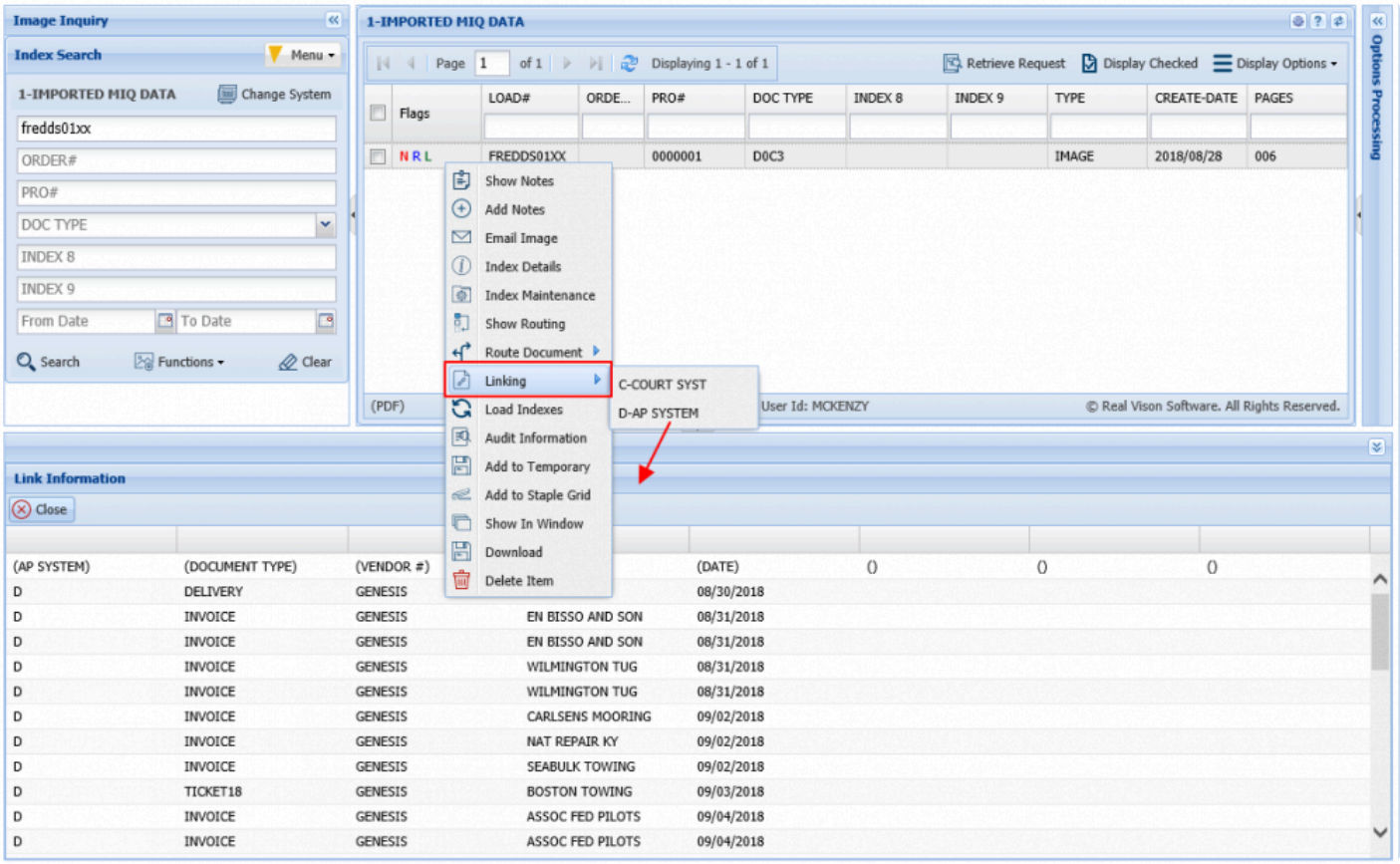
Option 2:

- 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.

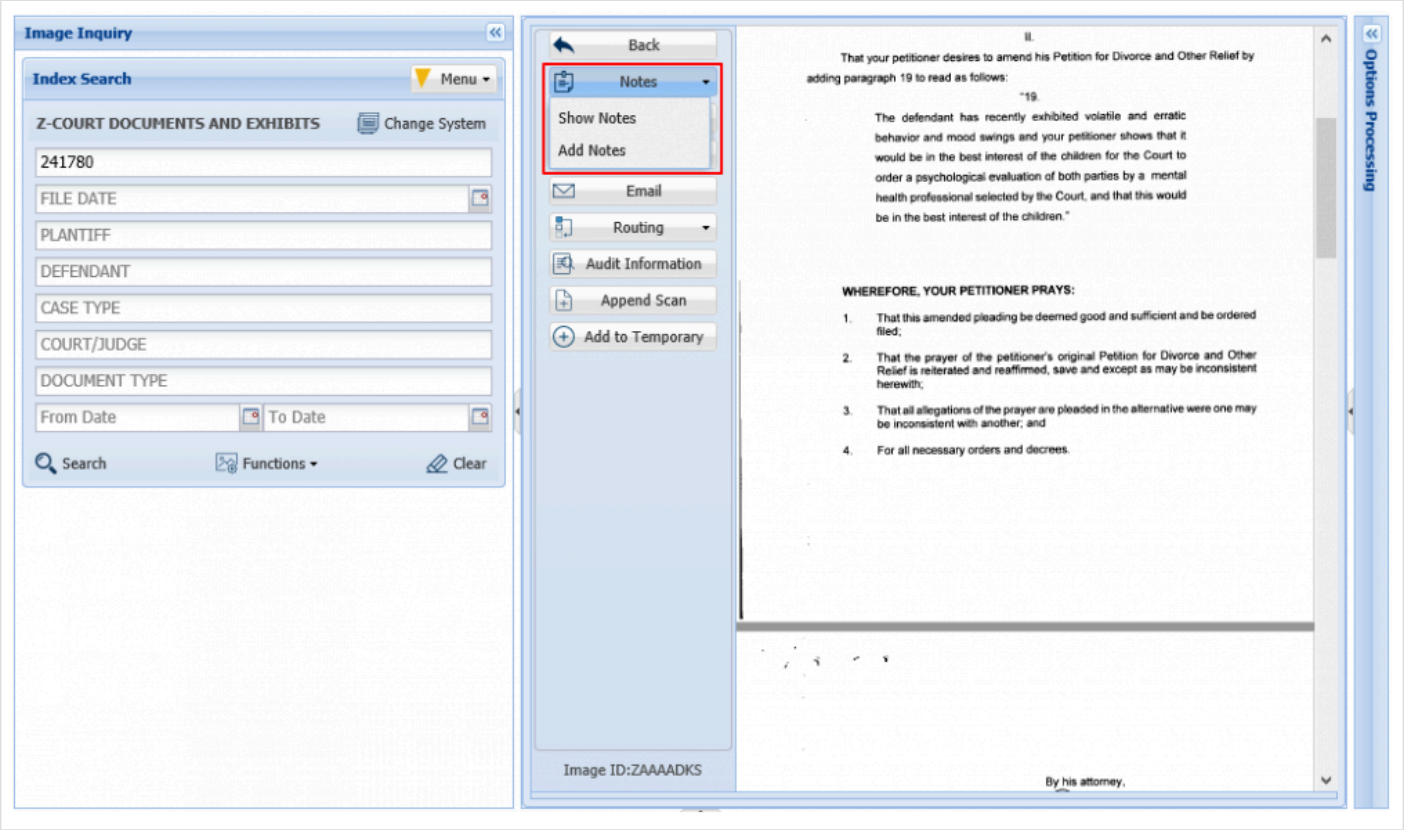


- Double-click any item in the list to view the document.

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

8.16. Notes

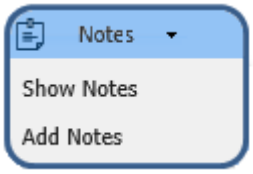
Notes: Adds notes to the image being displayed.



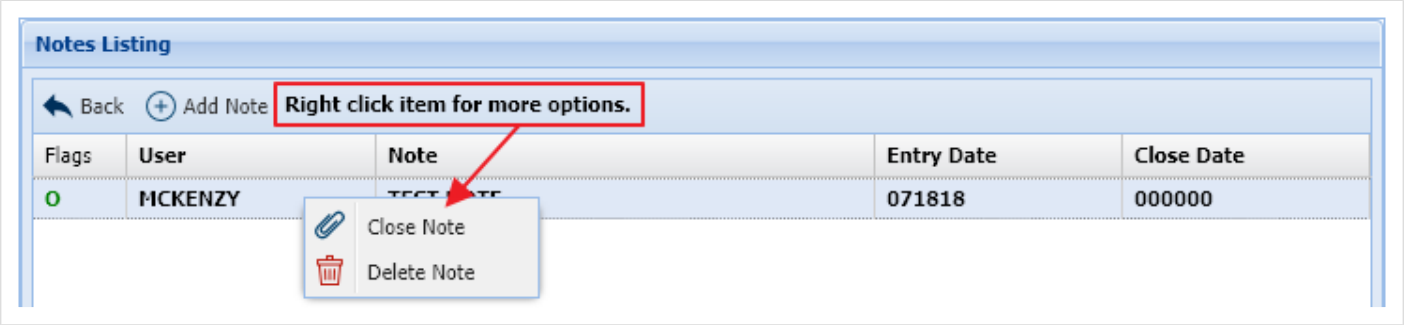
The record can be 'checked out' during the addition of notes to ensure that there are no conflicts between one or more users attempting to add notes to the same document.

<u>Once a Note is Added:</u>

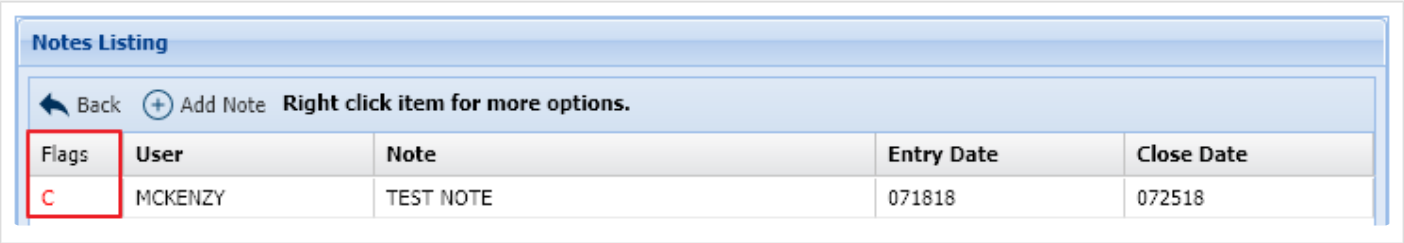
- The option to **Show Notes** will be available.



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

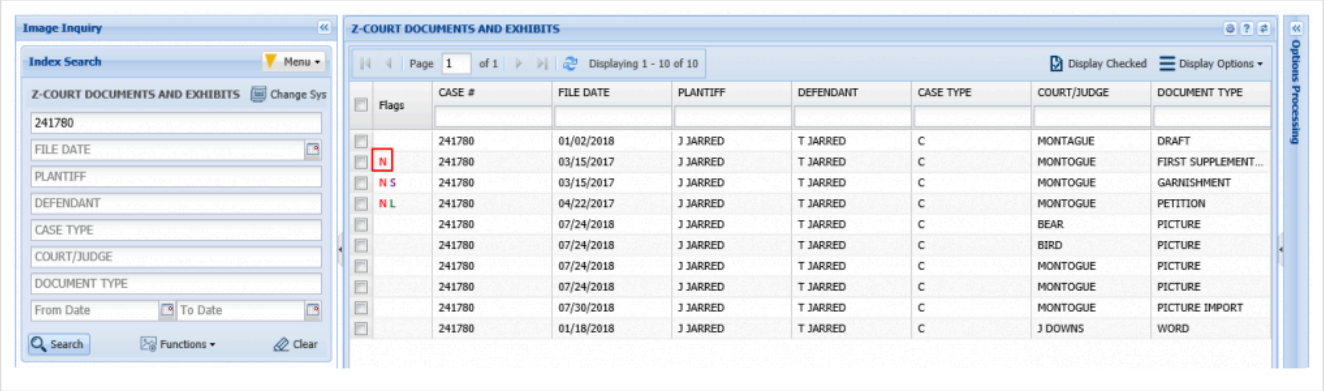


If the user chooses to close the note, under the Flags column, the O will change to C and the current date will be applied to the Closed Date field.



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.



8.17. OCR

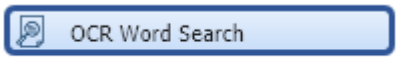
OCR requires a separate OCR license per pc. Contact Real Vision Software support for details.

8.17.1. OCR Word Search

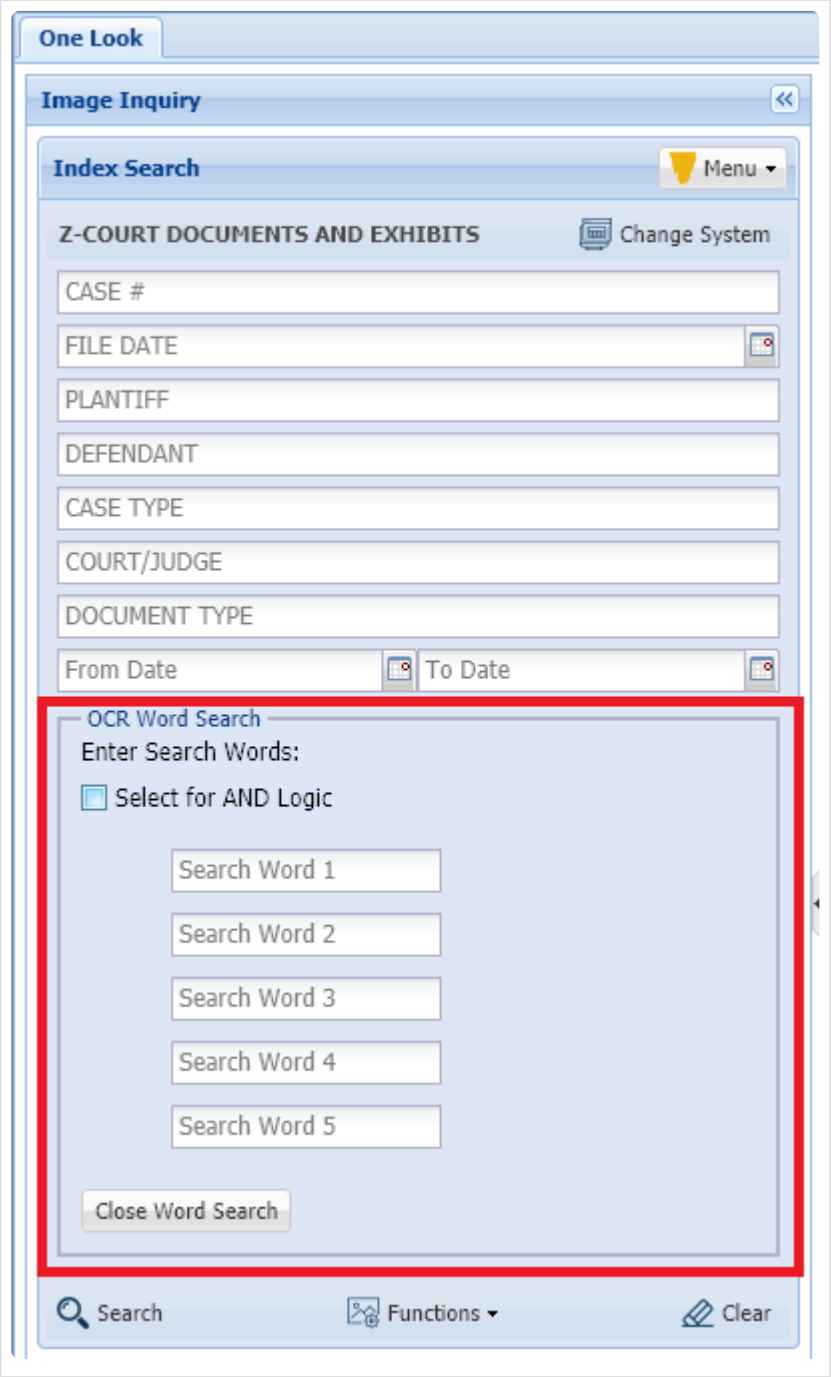
This function is used in conjunction with OCR scanning. It allows users to search all documents in a particular system id code for words that have been OCR'd at scan time. The OCR Word Search option will only be available for those system id codes that have existing full text OCR in place.

1. Select the

button.

2. Select the 

button.



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

OCR requires a separate license. Contact **RVI Support** to purchase an OCR license.

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
2. 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.


    F3 =Exit              Help Available                      90 =Signoff
  Selection or command
  ===> 12_
 ____________________________________________________________________________
  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
===> 1_
F3=Exit   F4=Prompt   F9=Retrieve   F12=Cancel
F13=Information Assistant  F16=System main menu
```

7. F6 = Add New PC Profile

```
Screen Scrape Selection Screen                    (c)Copyright RVI 1992, 1999
                                                              SCR004FM/FATLSTCT
Position To: _________
P =PC Point & Shoot Maintenance
X =Select
X Profile     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
_ MEDICALWEB  H-MEDICAL SYSTEM        04 014 Medical Application
_ MEDICAL400  H-MEDICAL SYSTEM        03 028 ENCOUNTER HISTORY                +

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

MA    D
```

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 System Selection Screen                    (c)Copyright RVI 1992, 1999
                                                                SCR005FM/CATLSTSF
Select Image System By Typing An X Next To The Appropriate System ID Code.

X  System    Description

_    S       ACCUFUND PURCHASE ORDERS
_    T       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
X    Z       COURT DOCUMENTS AND EXHIBITS
_    0       ACCUFUND CASH RECEIPT
_    1       IMPORTED MIQ DATA
_    2       ACCUF ACTIVITY/JOURNAL
_    3       ADMISSION IMAGES
_    4       ACCUFUND GRANTS                                                 +

Page Down -Next 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
 Screen Profile: ACC          Z  COURT DOCUMENTS AND EXHIBITS
            F1=STARTING POSITION
    Line    1...+...10....+...20....+...30....+...40....+...50....+...60....+.
 000000001  Real Vision Software, 8.0 - Internet Explorer
 000000002
 000000003  <]-- var rvisb = "N"; function apfunct(na) { if (rvisb == "N") { d
 000000004
 000000005
 000000006
 000000007
 000000008     Real Vision Imaging System
 000000009       Legal Application
 000000010


   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
```

11. Put a **P** next to the profile name

```
Screen Scrape Selection Screen                    (c)Copyright RVI 1992, 1999
                                                                SCR004FM/FATLSTCT
Position To: __________
P =PC Point & Shoot Maintenance
X =Select
X Profile     Image System           Unique Screen Identifier
P ACC         Z-COURT DOCUMENTS AND  11 001 Alexandria County Court
_ ACCTPAYFT   A-AP WORKFLOW SYSTEM   01 001 ACCTPAYFT
_ ACCUFAJE    2-ACCUF ACTIVITY/JOURN 01 001 ACCUFAJE
_ ACCUFAPINV  O-ACCUFUND ACCOUNTS PA 01 001 ACCUFAPINV
_ ACCUFARINV  P-ACCUFUND A/R SYSTEM  01 001 ACCUFARINV
_ ACCUFCR     0-ACCUFUND CASH RECEIP 01 001 ACCUFCR
_ ACCUFGRANT  4-ACCUFUND GRANTS      01 001 ACCUFGRANT
_ ACCUFGRITM  5-ACCUFUND GRANT ITEMS 01 001 ACCUFGRITM
_ ACCUFPOINV  S-ACCUFUND PURCHASE OR 01 001 ACCUFPOINV
_ ACCUFRQINV  Q-ACCUFUND REQUISITION 01 001 ACCUFRQINV
_ ACCUFUND    R-SIGNATURE DOCUMENT S 12 001 General F
_ ACCUFUNDPC  I-INSURANCE SYSTEM     01 001 ACCUFUNDPC
_ AP SYSTEM   D-AP SYSTEM            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
```

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

```
PC-Scrape Text File Selection                          (c) Copyright 2008, RVI
Options:          Files Are Sorted From Most Recent To Oldest   RVPSLSFM/SFLCTL
 X =Select        F3 or F12 To Use PCS.TXT

Opt  File Name    Date Created  First Line In File
 _   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_IBMiCloud_Fix  -  Compatibilit
 X   MONTY.TXT     2018/09/20   Real Vision Software, 8.0 - Internet 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 Scrape Layout/Maintenance Screen          (c)Copyright RVI 1992, 1999
                                  Image System Description            SEGMX
 Screen Profile: ACC          Z  COURT DOCUMENTS AND EXHIBITS
            F1=STARTING POSITION
    Line    1...+...10....+...20....+...30....+...40....+...50....+...60....+.
 000000001  Real Vision Software, 8.0 - Internet Explorer
 000000002
 000000003  <]-- var rvisb = "N"; function apfunct(na) { if (rvisb == "N") { d
 000000004
 000000005
 000000006
 000000007
 000000008     Real Vision Imaging System
 000000009       Legal Application
 000000010

   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          (c)Copyright RVI 1992, 1999
                                                                SCR005FM/START
Please Enter The Corresponding Indexing Number. (1-8)
Indexes Are Shown Here For The Image System Selected. Please Select An Index
From 1-7 Or Use 8 To Select The Unique screen identifier.
    Image System -   Z  COURT DOCUMENTS AND EXHIBITS
                     1. CASE #
                     2. FILE DATE
                     3. PLANTIFF
                     4. DEFENDANT
                     5. CASE TYPE
                     6. COURT/JUDGE
                     7. DOCUMENT TYPE

        Index Number 1-99:    00 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:

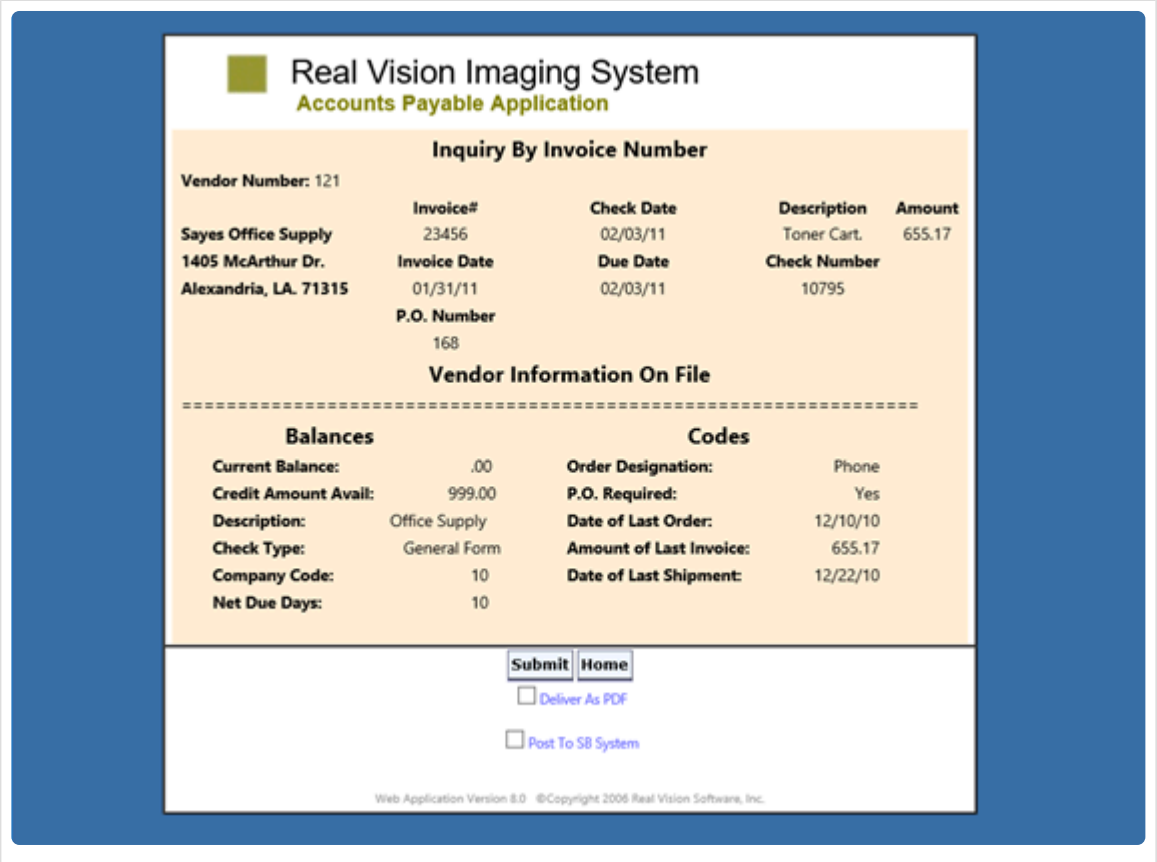
- Open One Look in Internet Explorer
- Navigate to the desired pc screen to be captured
- Press **CTRL+SHIFT+F5** to capture the screen

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

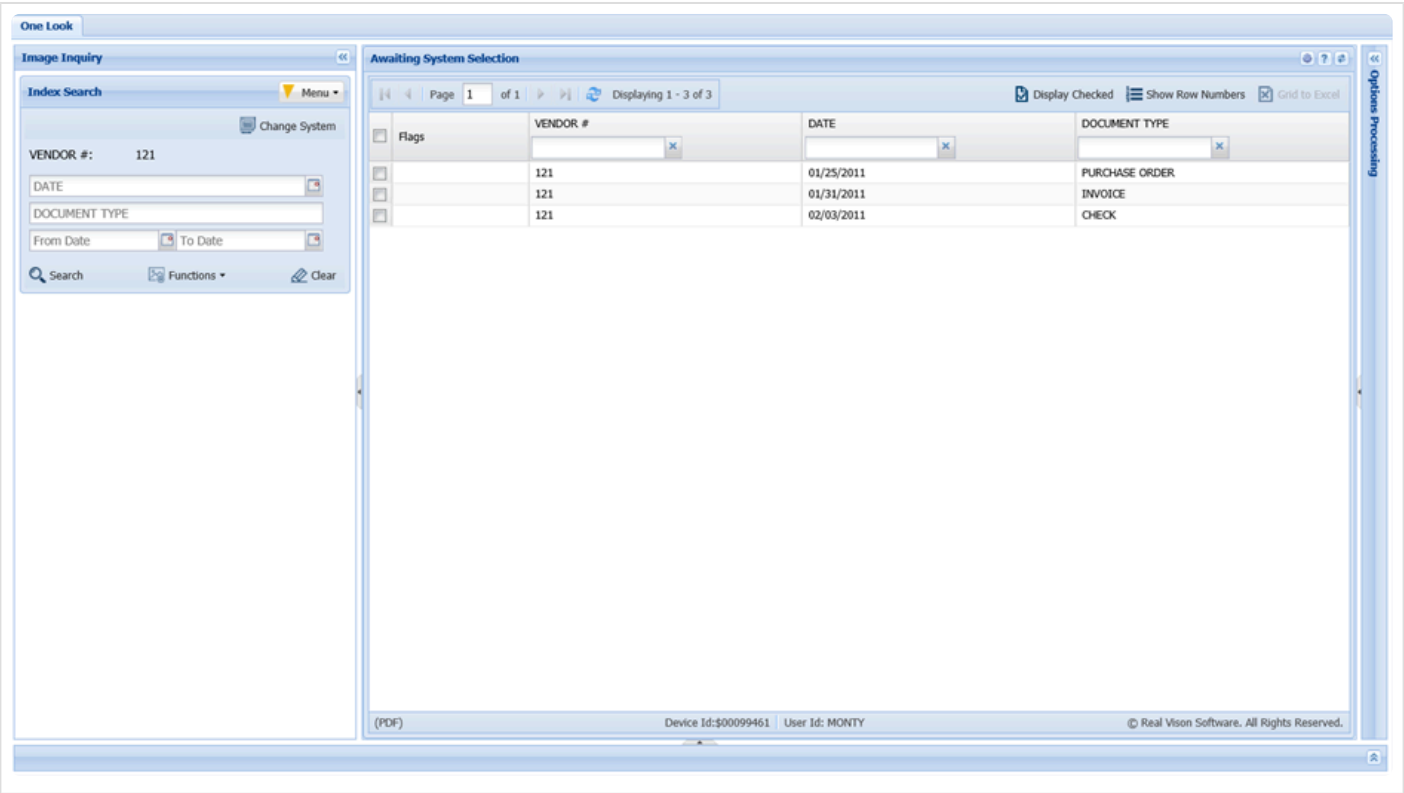
PC Screen Scrape Example:

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).



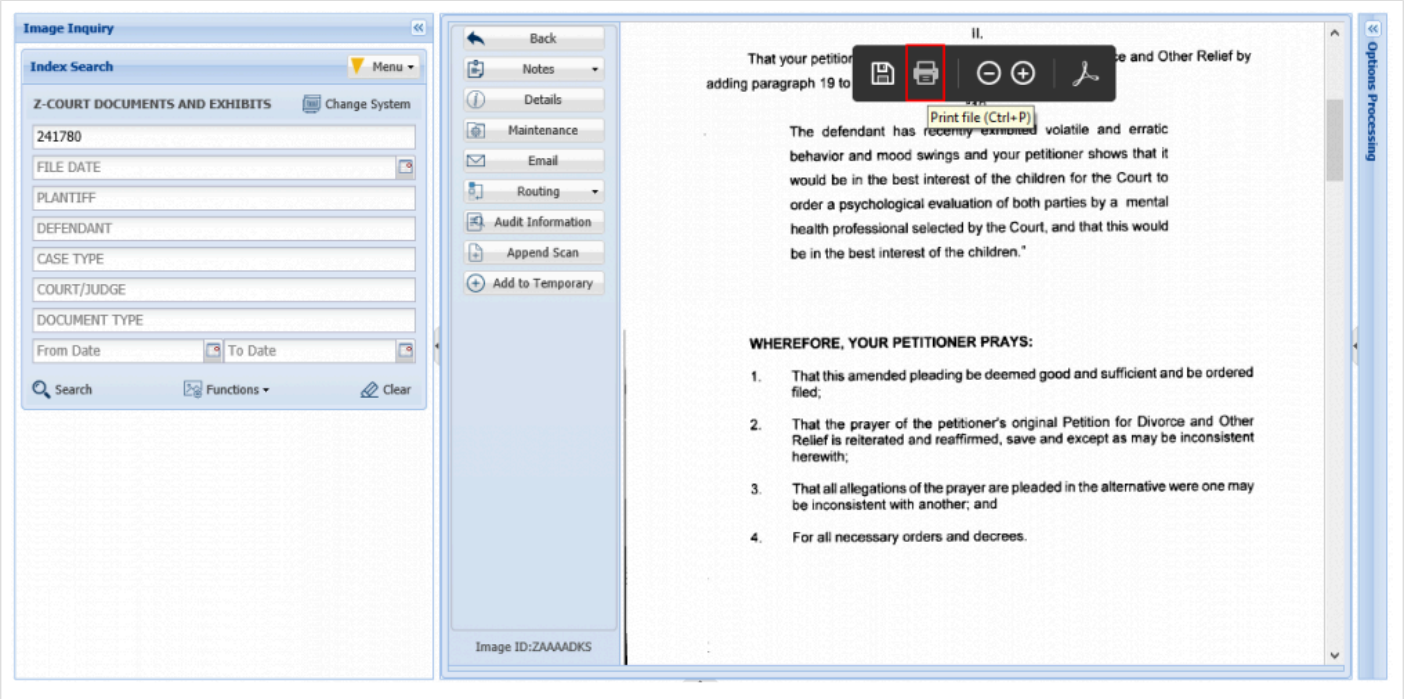
Based on the vendor number 121, these results are displayed in the frames-based listing in One Look.



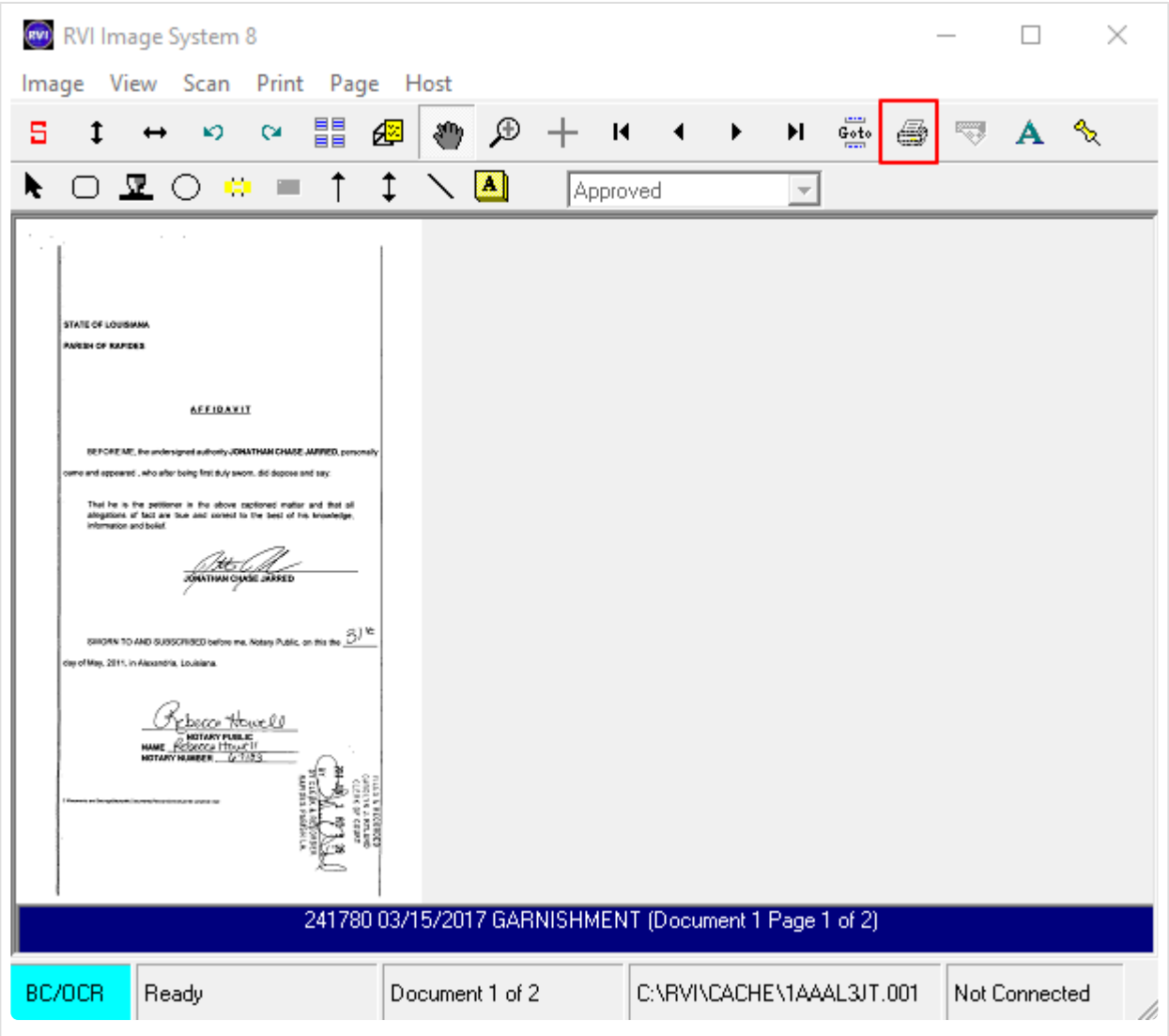
For further details on the IBMi Screen Scrape menus and the use of a Pre-Scrape Profile when the data on the interface screen is not static, refer to Chapter 14 (Screen Scrape Menu Functions) in the RVI 90 IBMi User Manual.

8.19. Print

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



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



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

4. Select a existing user by placing an **X** next to the record OR 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)Copyright RVI 1992, 1999
                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
 _ H=HTTP           _ T=TCP-UNC            _ 3=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 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
 _ 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

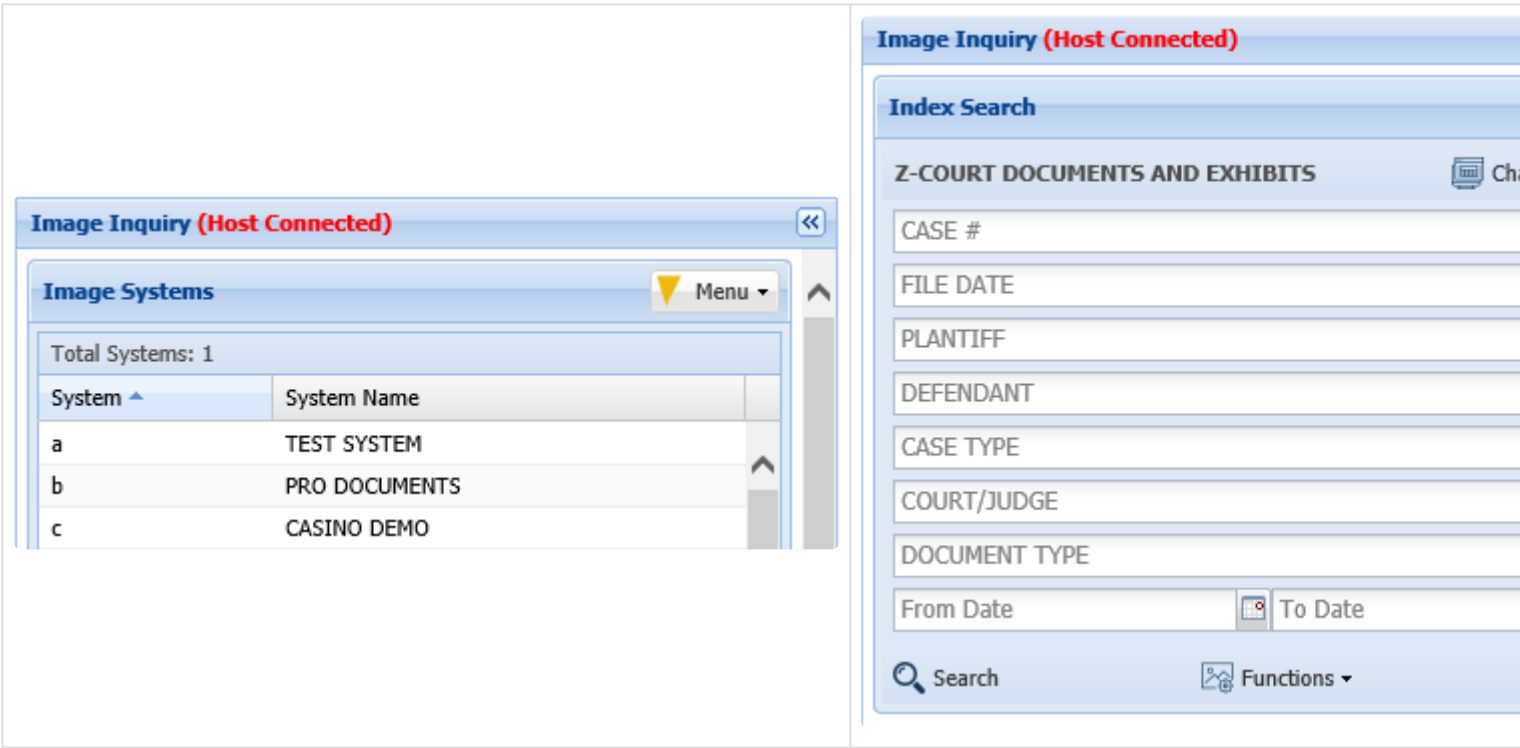
A sub file list of records will display on the IBM i matching the index search criteria. Put a **V** next to the record you want to view. The image will be displayed in One Look.

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 or 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.



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 MVC013 or MVC013D 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, Maintain PC Workstation Configuration 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.

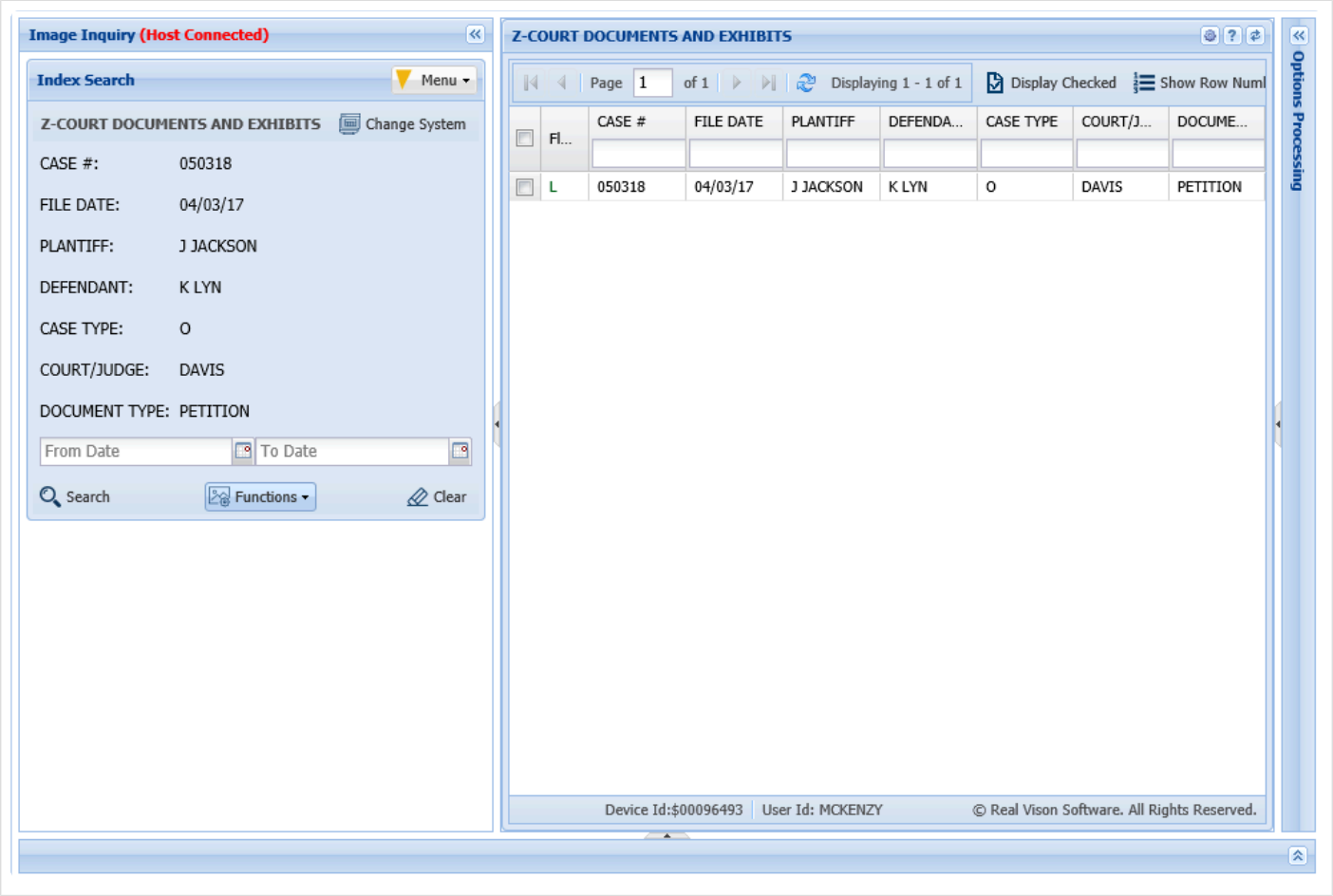
```
Image Scanning Index Definition Screen                (c) Copyright 2005, RVI
                                                                UDDSIDX7/REQUEST
  This Program Allows You To Assign Indexes To New Images Being Scanned.
  Page Up Or Down For Additional Indexes Defined For This Image System.

                        COURT DOCUMENTS AND EXHIBITS

     CASE #                          050318
     FILE DATE                       04/03/17
     PLANTIFF                        J JACKSON
     DEFENDANT                       K LYN
     CASE TYPE                       O
     COURT/JUDGE                     DAVIS
     DOCUMENT TYPE                   PETITION

F3 =Exit   F12 =Cancel   F11 =Upload  PageUp/Down =Addl Idxs   Enter =Continue

MA    B                                                                10/041
```

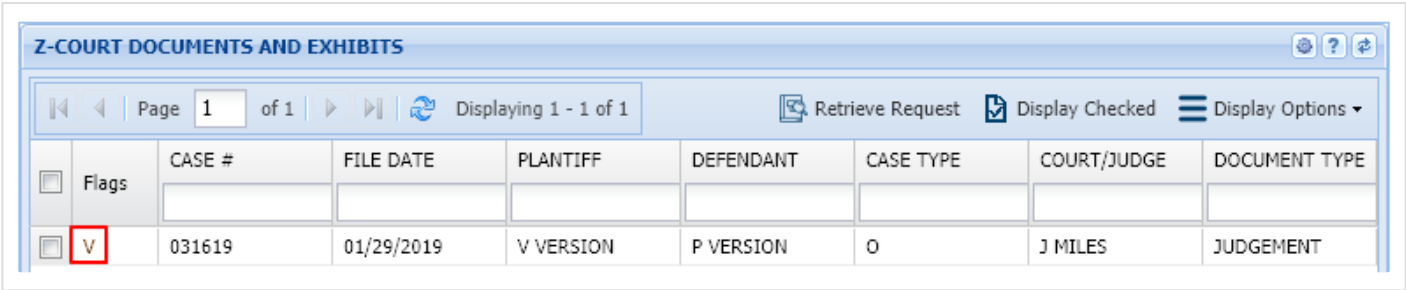


8.21. Previous Version

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

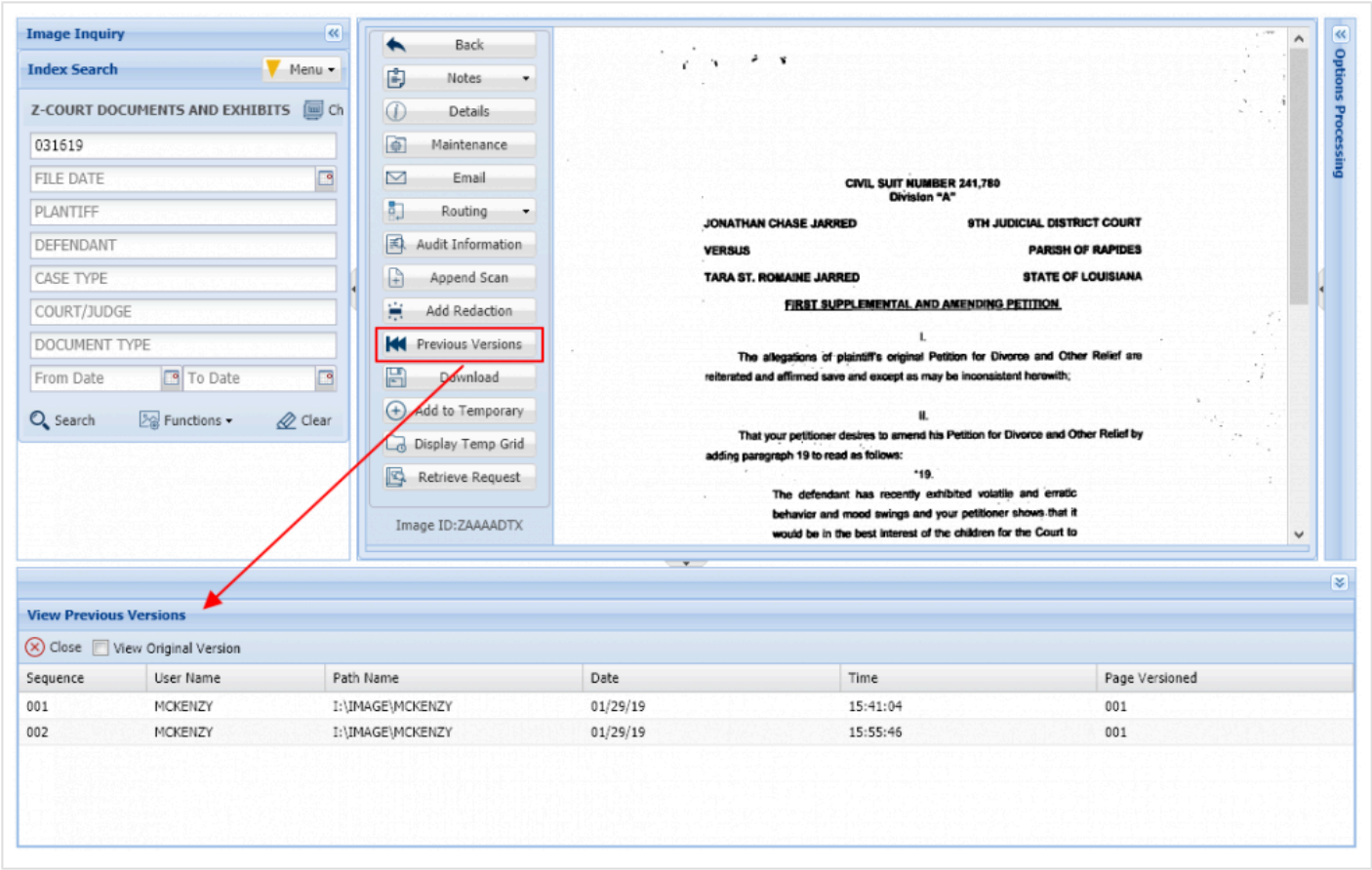
Documents that have been versioned in prior releases of RVI will be accessible via the One Look interface. Users can select the Previous Version button to access and display the previous version(s) of the document.

If a document has a previous version, a **V** will appear in the Flags column.



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.



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

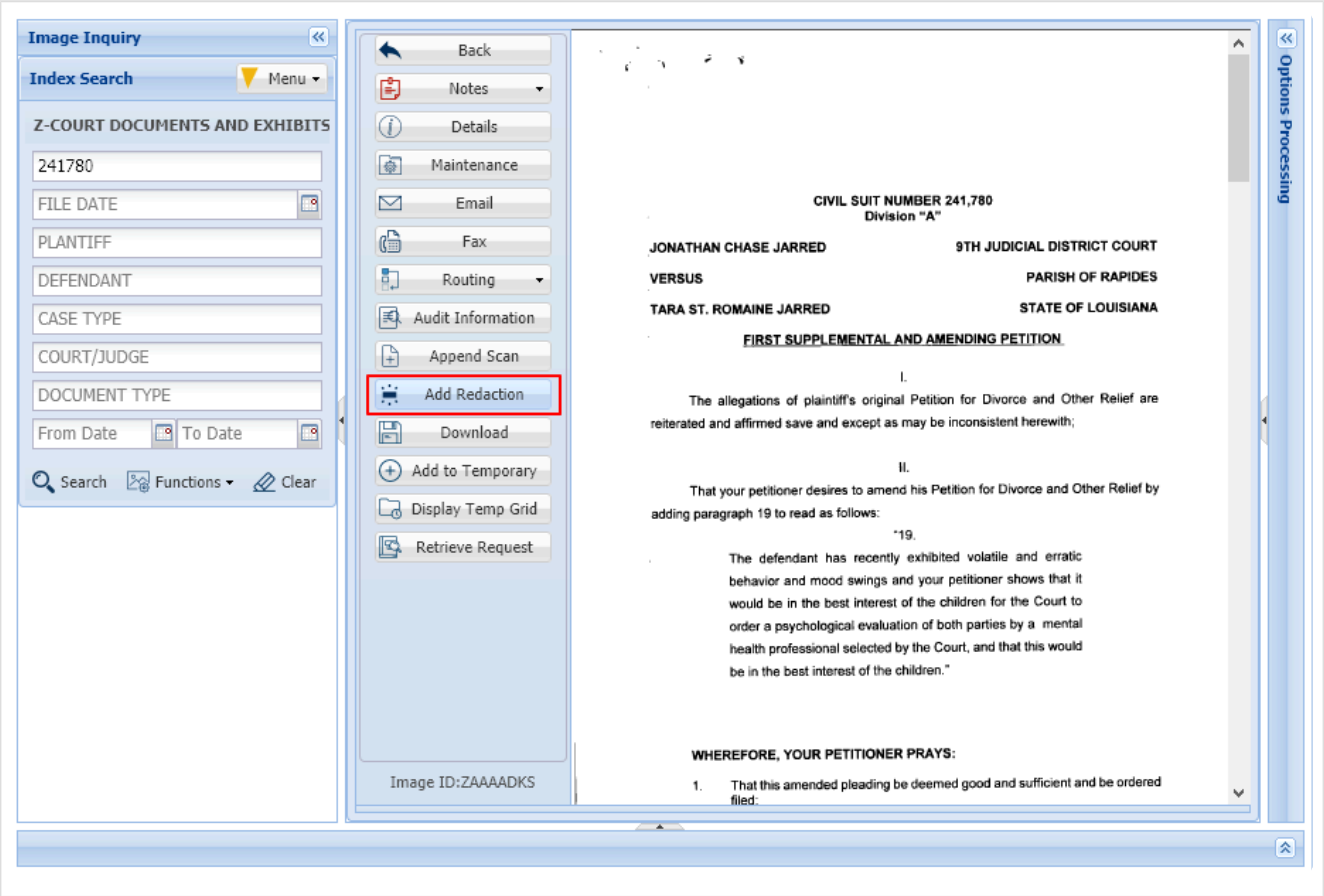
8.22. Redaction

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.

> This option operates under the rules of option security. If a user does not have authority to add redaction, they cannot use this feature.

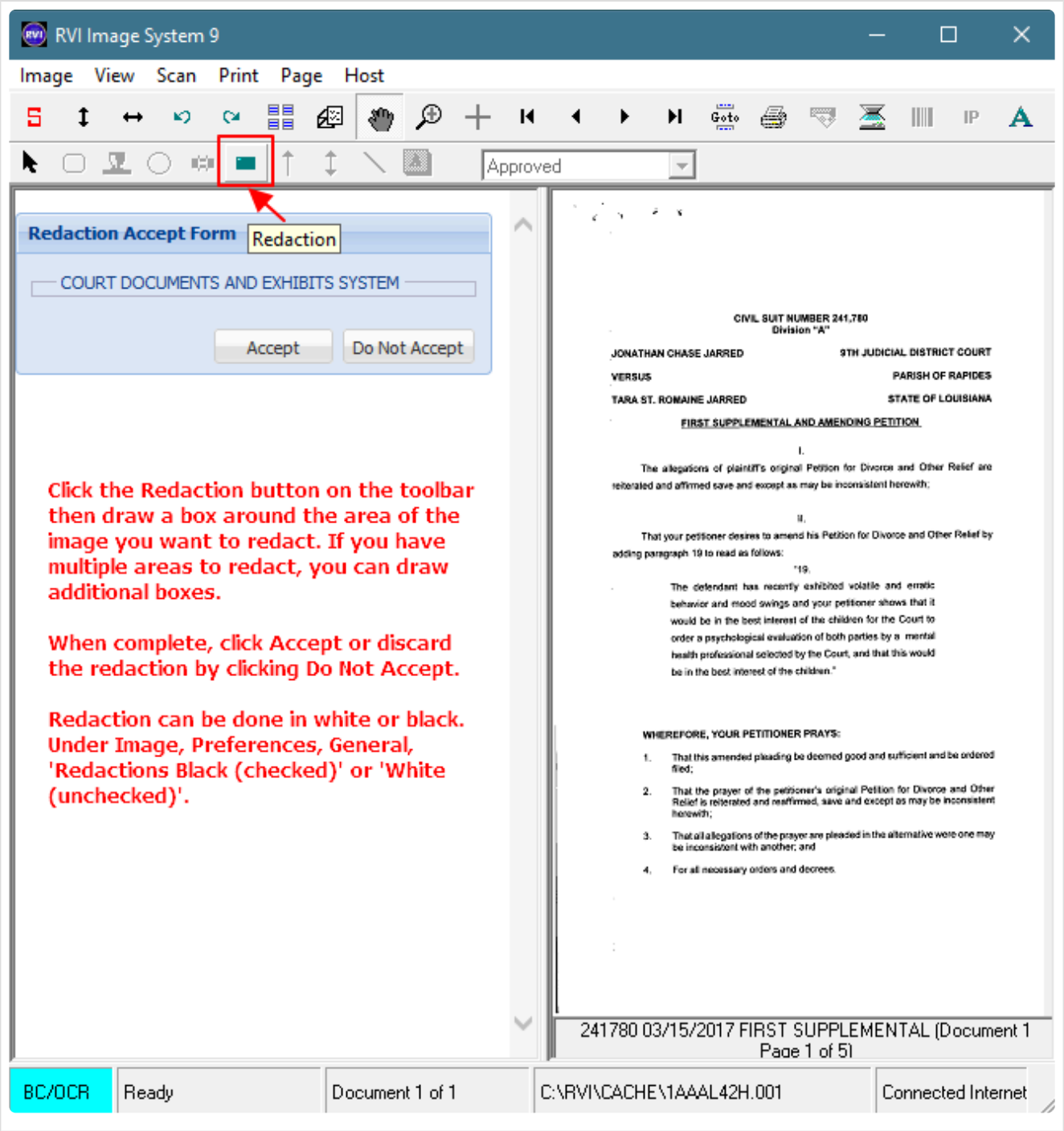
1. Display an image in One Look.
2. Select Add Redaction to display the image in the RVI PC Viewer.



3. Click the redaction button 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.

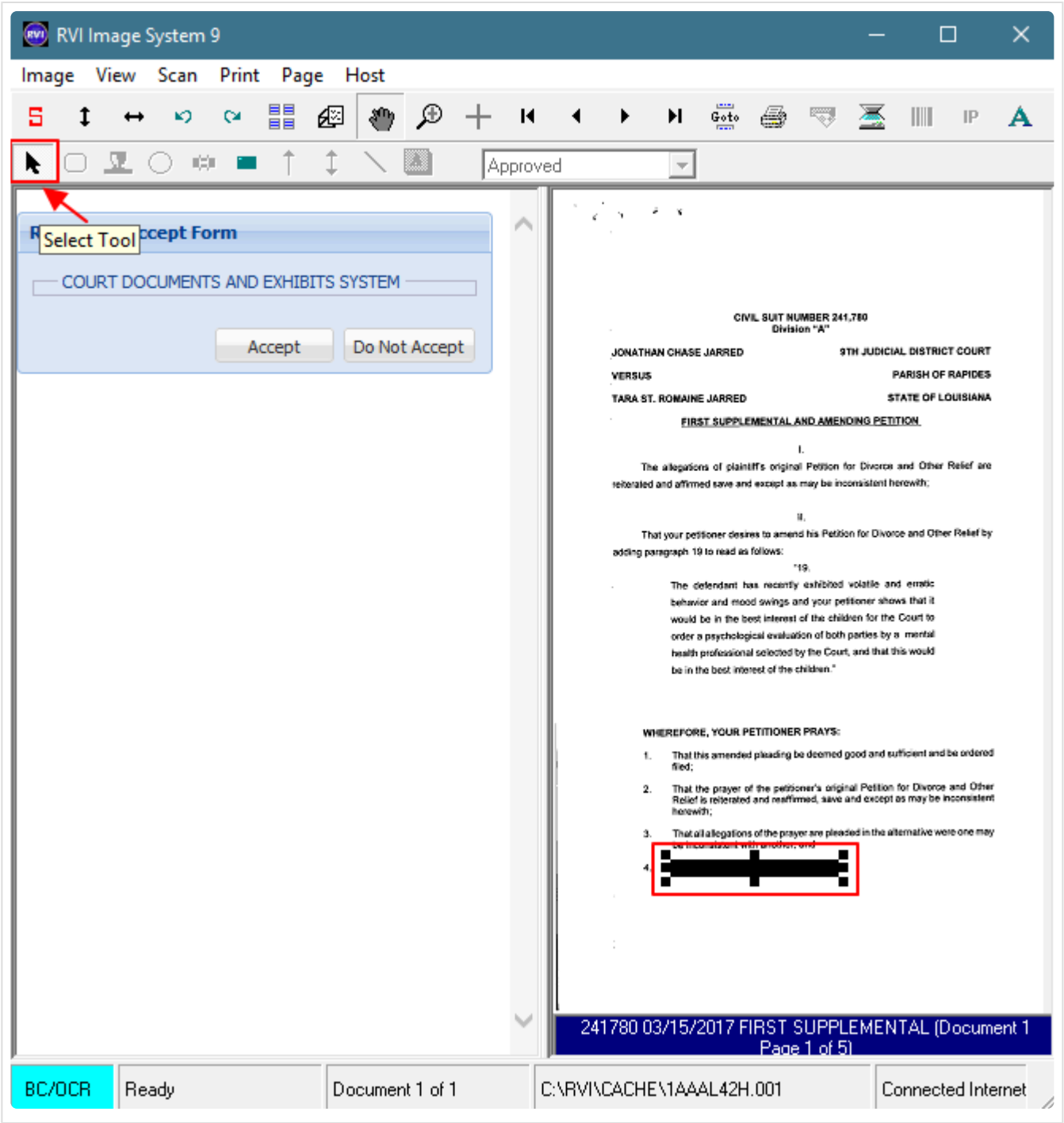


! Wait until the viewer completely clears the image to ensure the redaction process is complete.

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**.

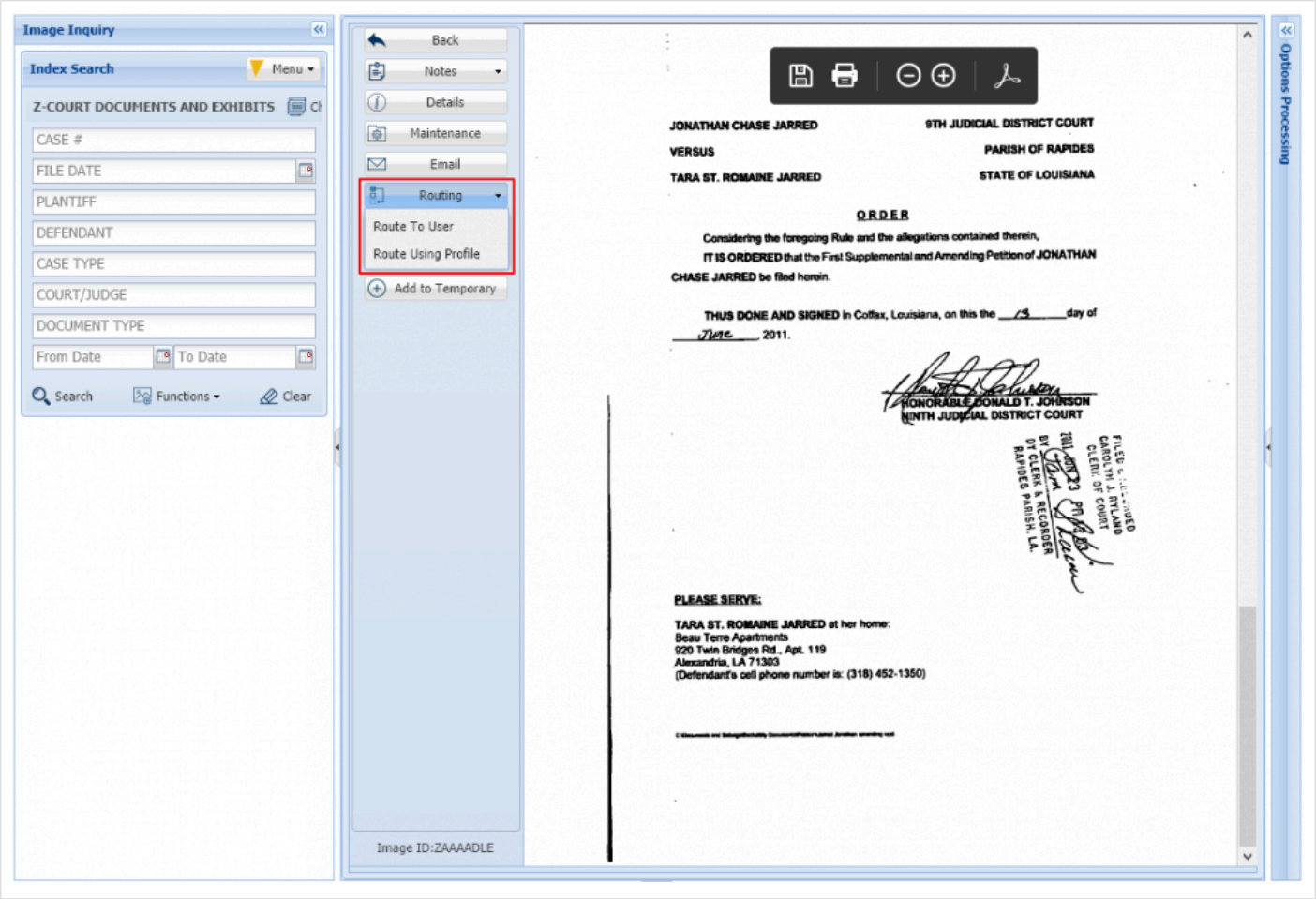


8.23. Routing

To watch a video on this topic CLICK HERE

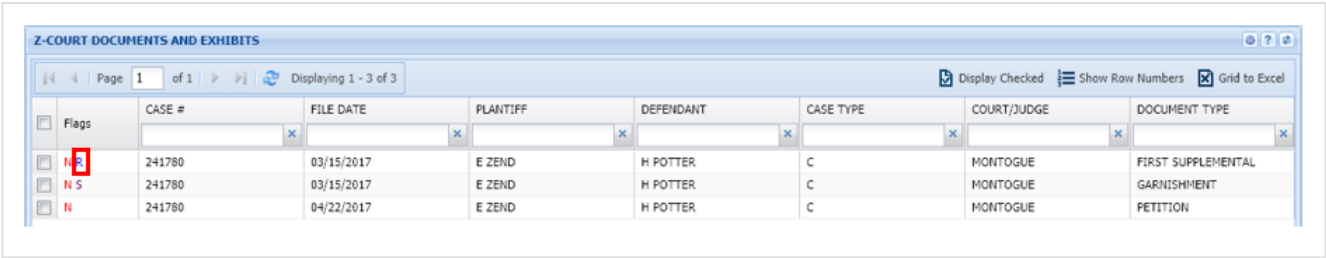
Routing: Sends the image to another user/profile based on the routes setup on the IBM i server. (*The*

routing profile is setup by your system administrator.)

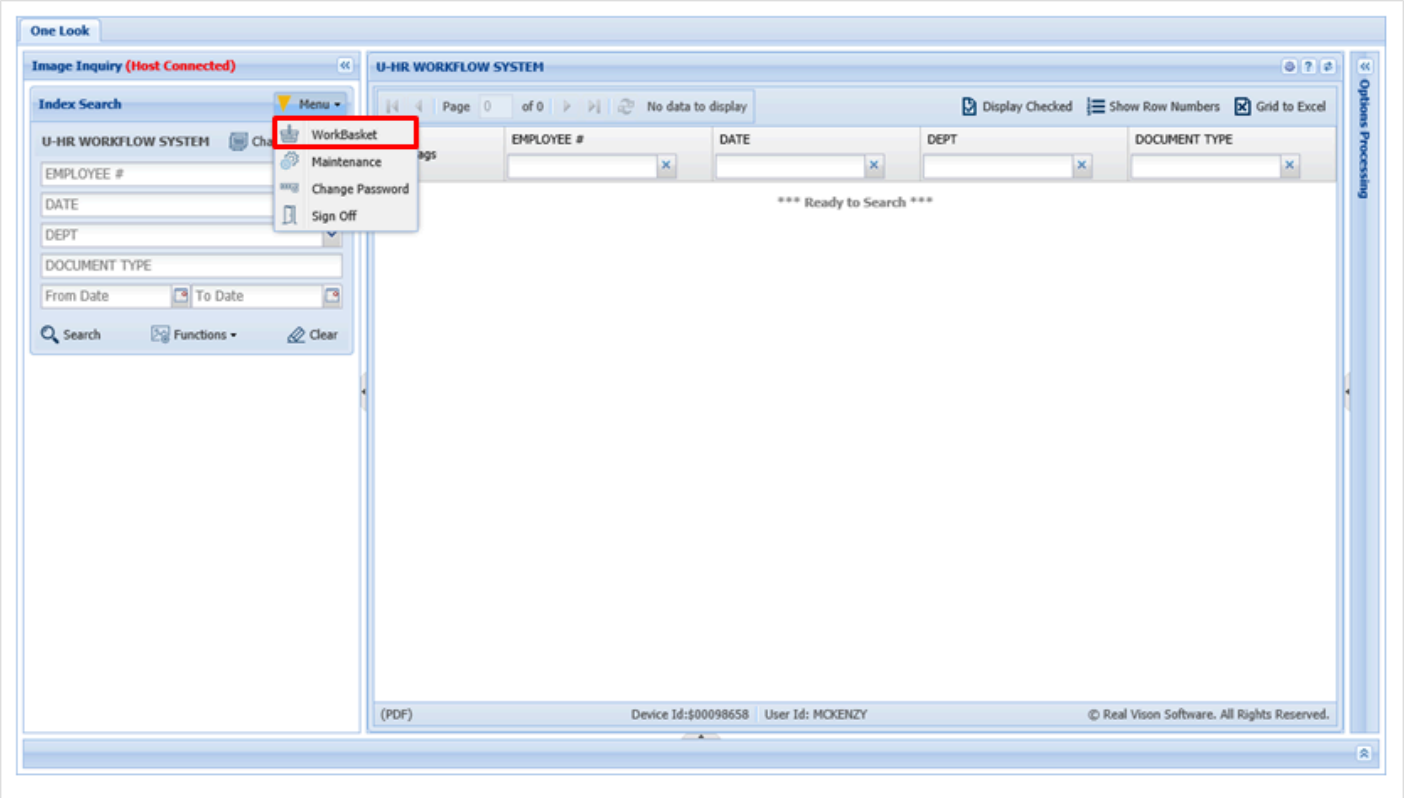


Once a document is Routed:

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



To work with items routed to your workbasket, select Menu, WorkBasket to access your workbasket.



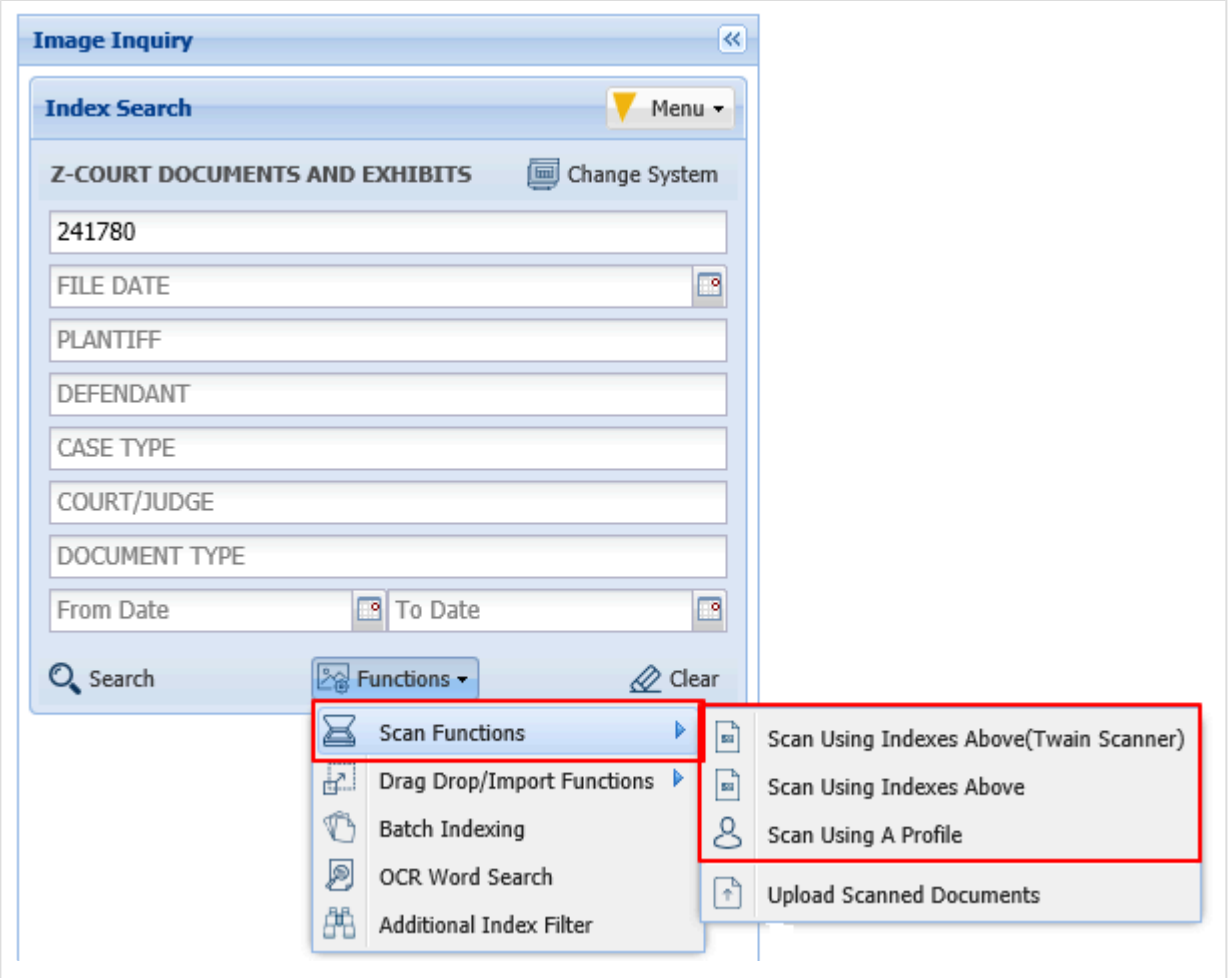
8.24. Scan

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.*
2. Select the

button.
3. Select the

button.
4. Select one:
   a. **Scan Using Indexes Above (Twain Scanner)** (*Uses Scan Direct*)
   b. **Scan Using Indexes Above** (*Uses Scan Direct*)
   c. **Scan Using A Profile** (*Performs Based on the Scan Profile Settings*)



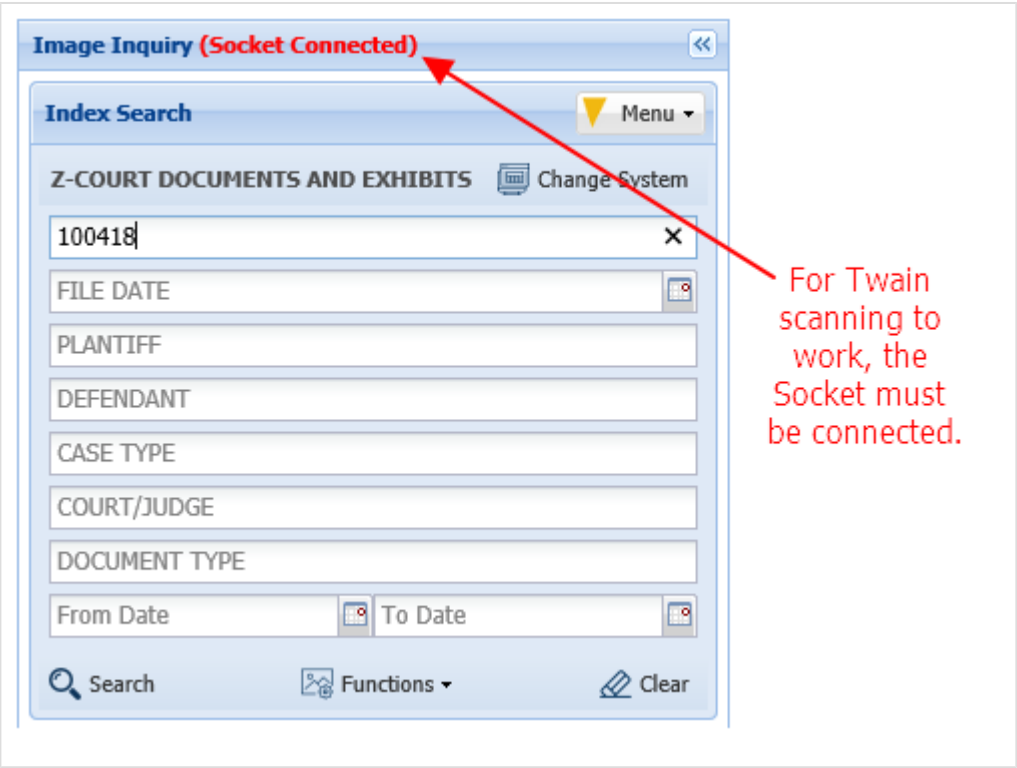
> ! One Look requires the **RVI PC Viewer** (*8.1.1389 or newer*) for scanning.

To watch a video on this topic click here.

8.24.1. Scan Using Indexes Above (Twain Scanner)

> ! This function requires *RVI Sockets.exe* and IBMi program *rvweztoimf.pgm*. Contact Real Vision Software for details.

1. Type the desired index values into the index search window. (**You MUST supply at least one index.**)



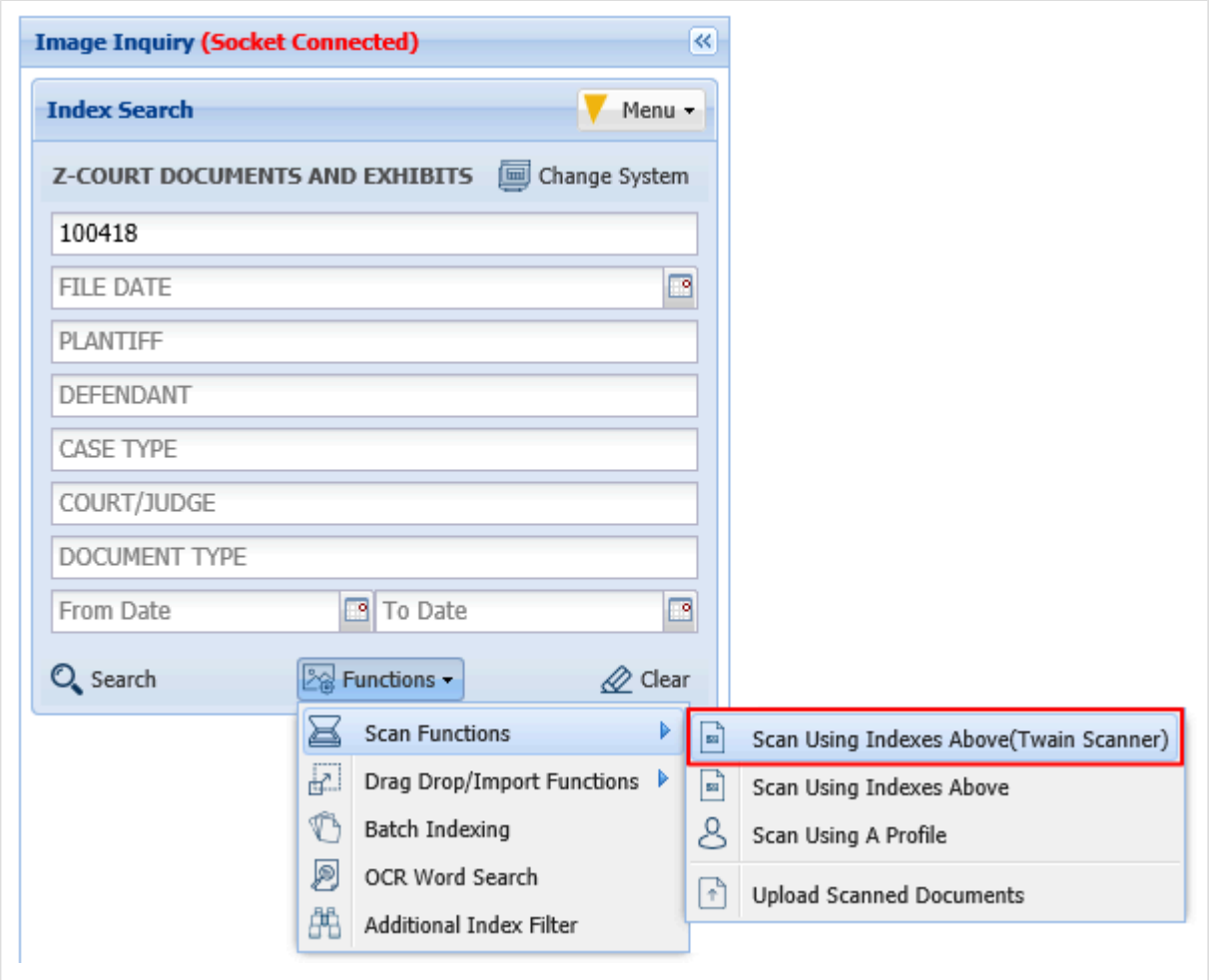
2. Select the

button.

3. Select the

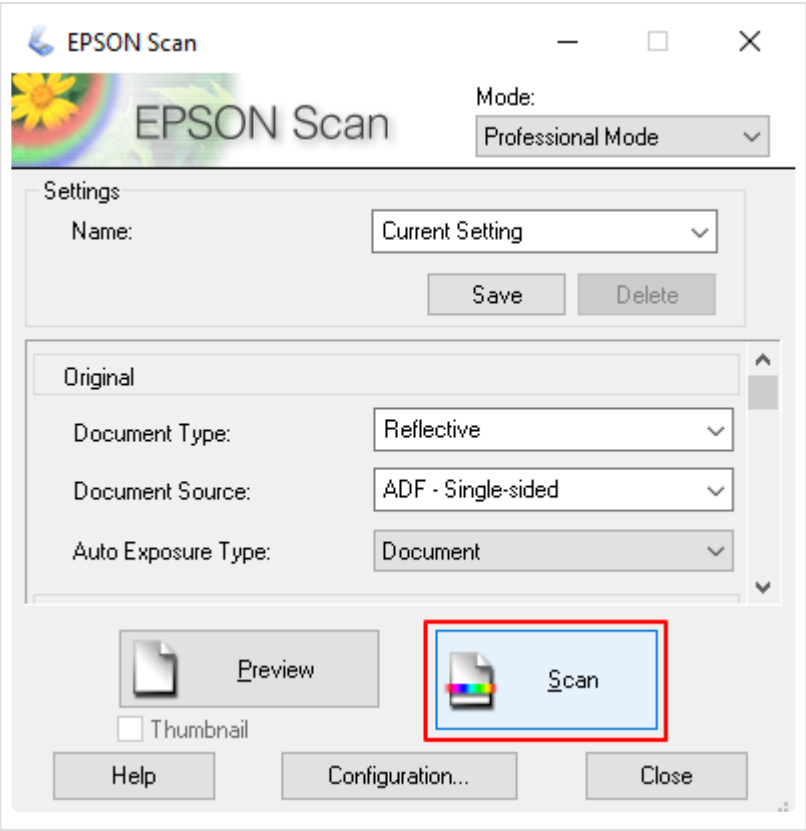
button.

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

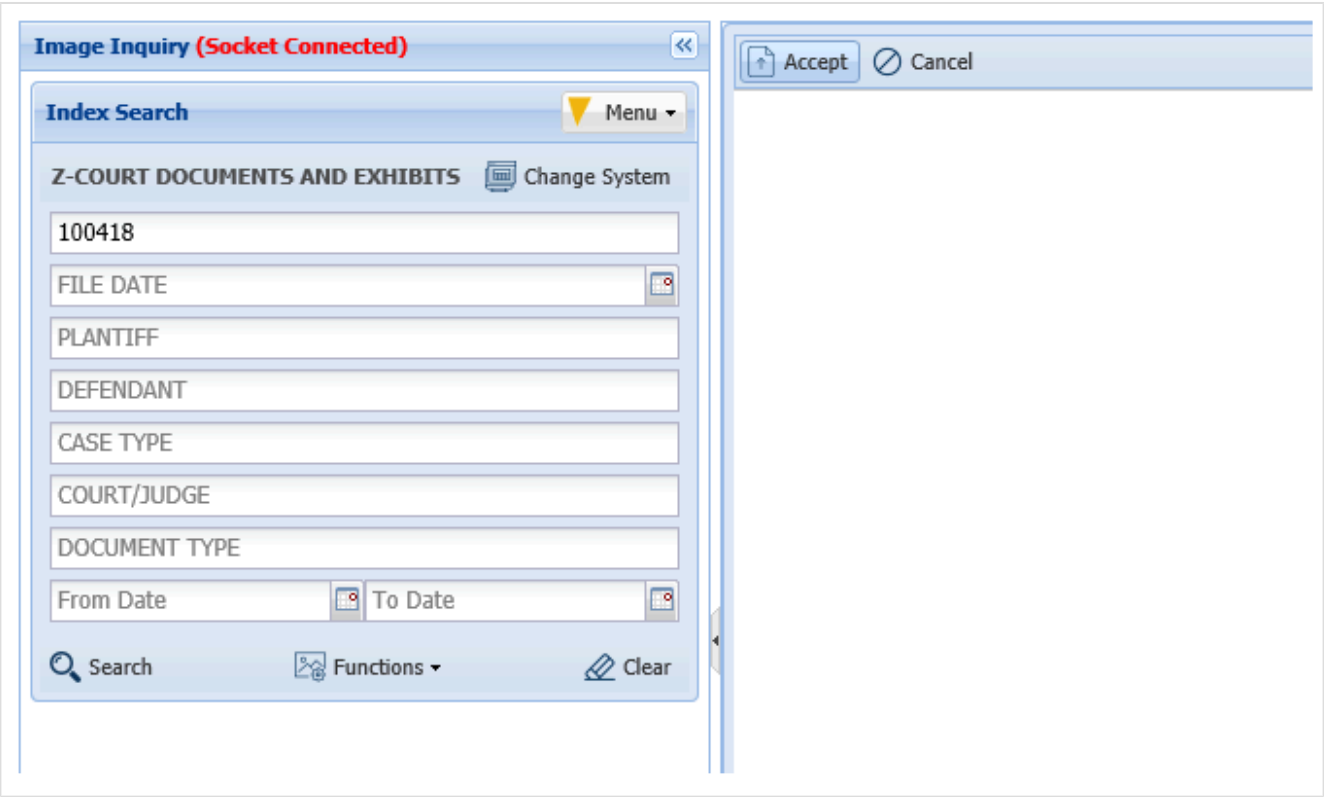


The twain interface (*specific to the make/model of the scanner*) will pop up.
If the twain interface does not automatically pop up, verify the twain device is specified in the RVI Socket Server setup.

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

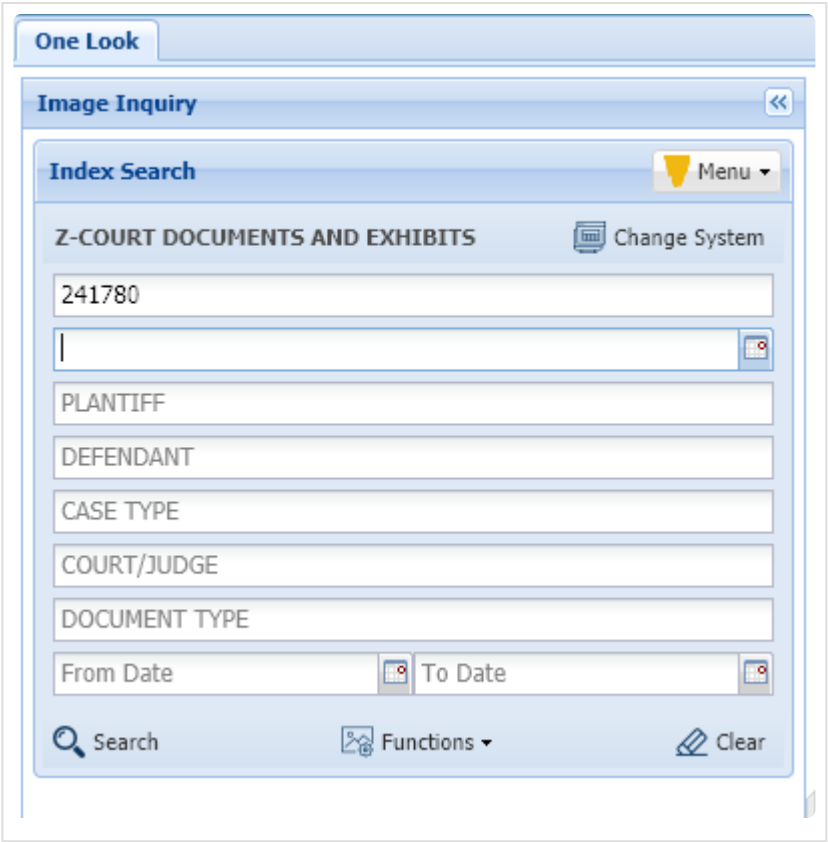


5. Select Accept to save the scan or Cancel to reject the scan.



8.24.2. Scan Using Indexes Above

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



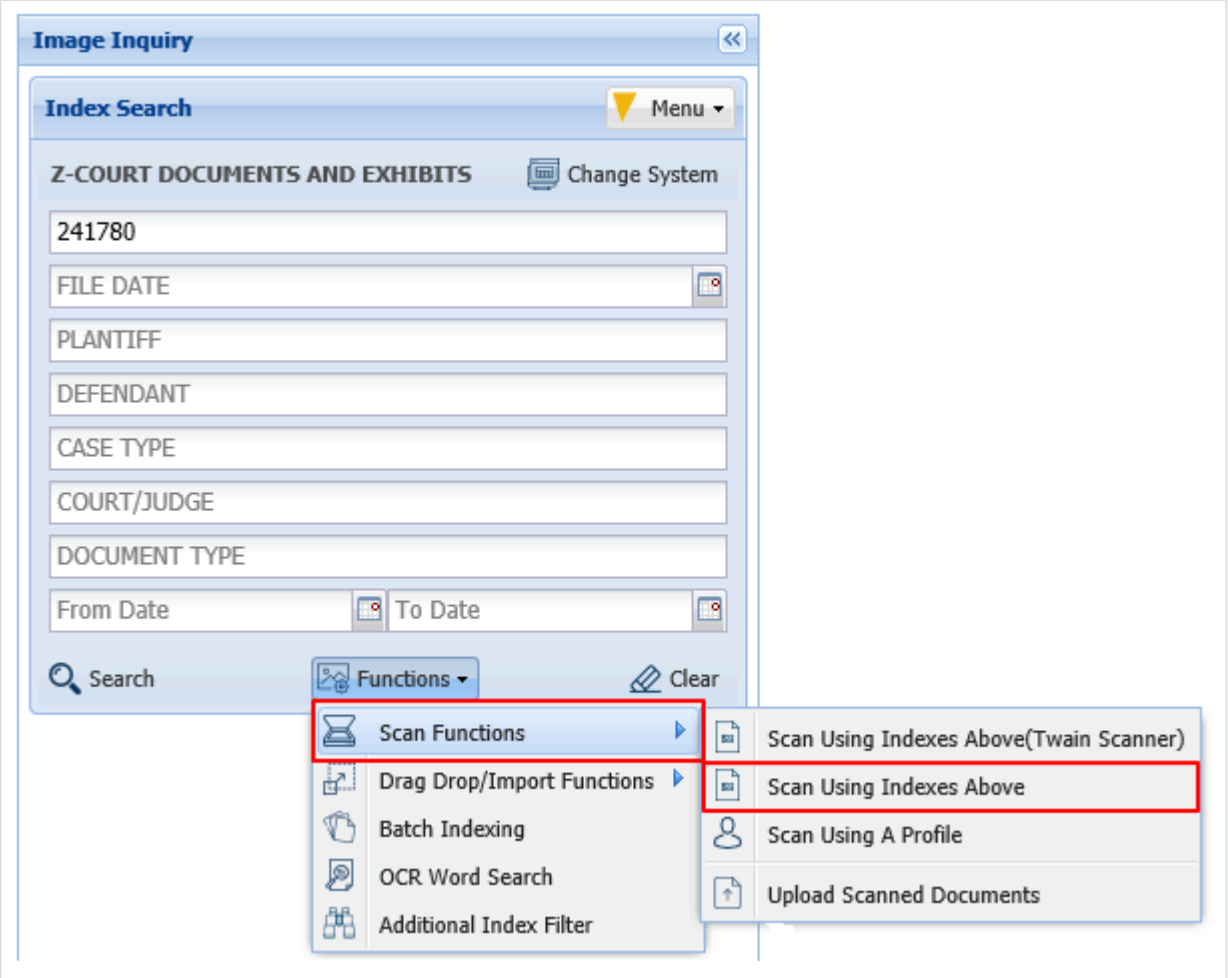
2. Select the

button.

3. Select the

button.

4. Choose **Scan Using Indexes Above**.



! 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 scanning profiles for this application.

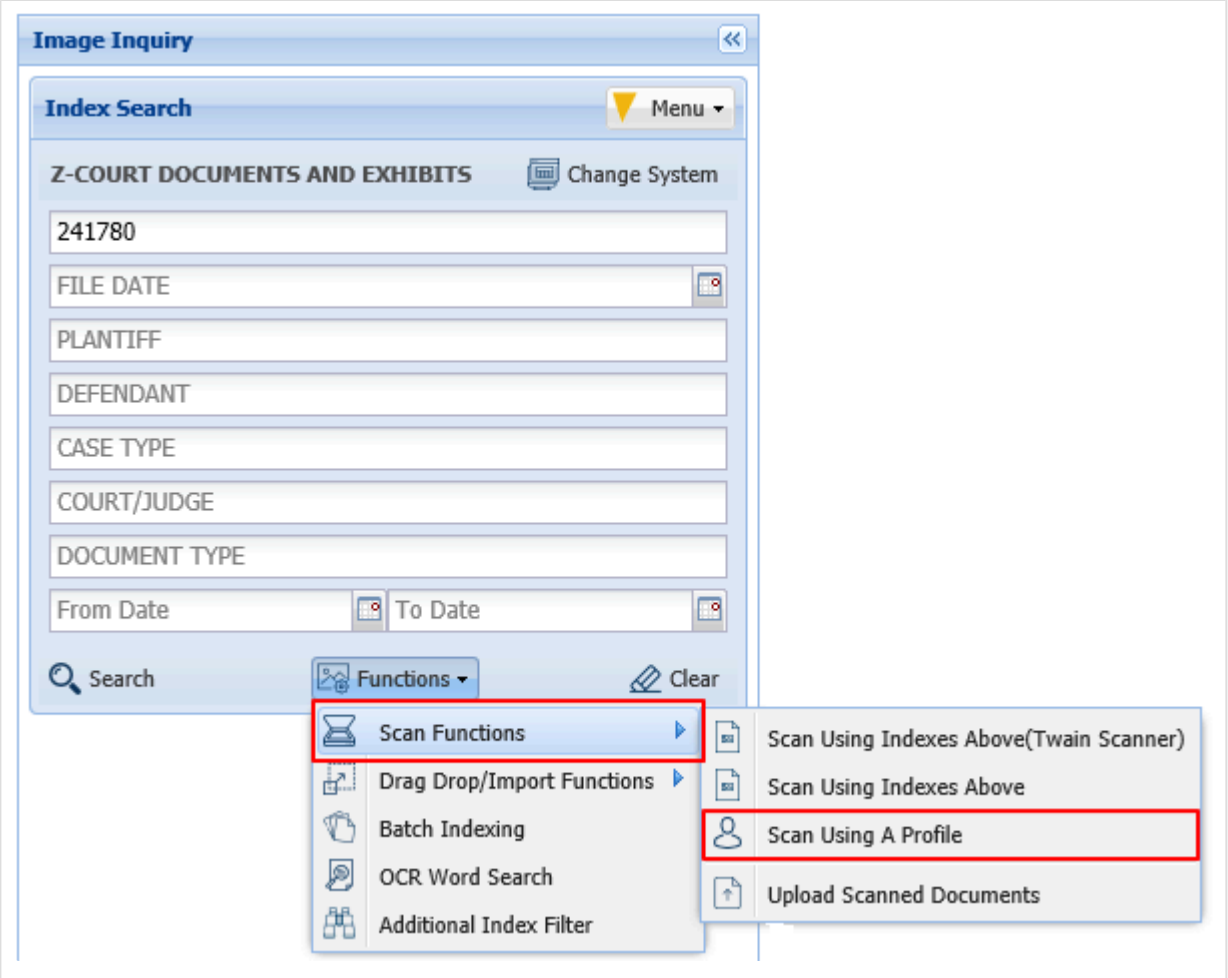
1. Select the

button.

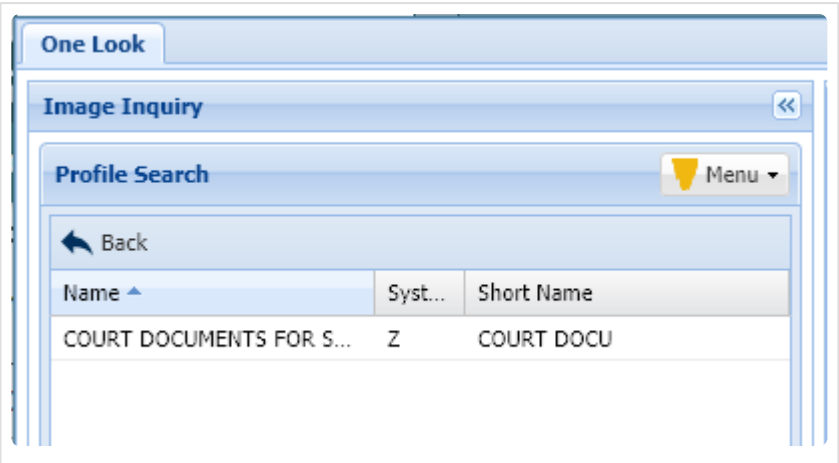
2. Select the

button.

3. Choose **Scan Using A Profile**.



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



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

8.24.4. Upload Scanned Documents

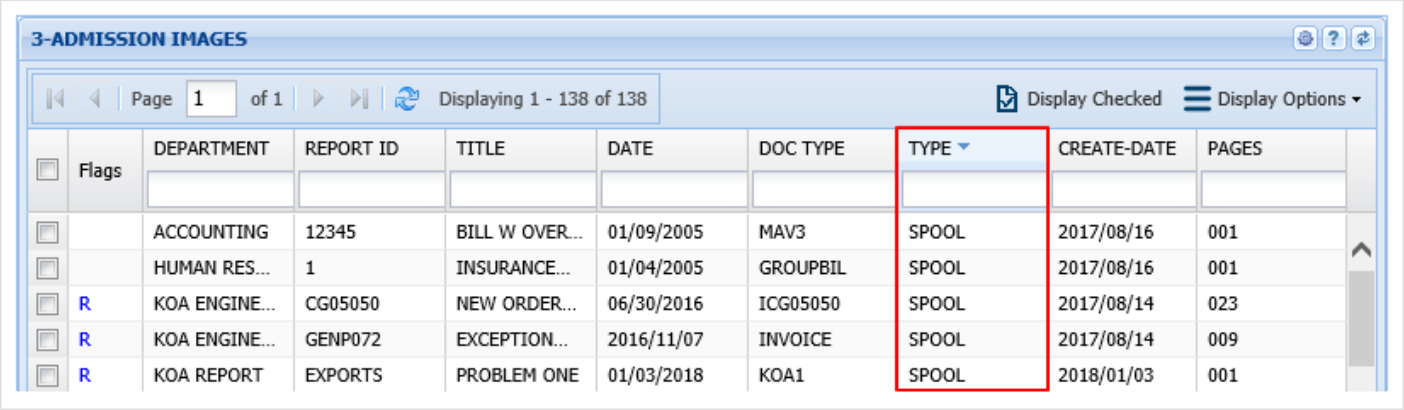
Scan Using Indexes Above does not require an upload. These scans are set to scan direct to the IBM i server.

Scan Using A Profile can be setup to scan direct or as a scan upload. The scan upload option requires the user to select the Upload Scanned Documents button to move the images from the pc to the IBM i server.

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

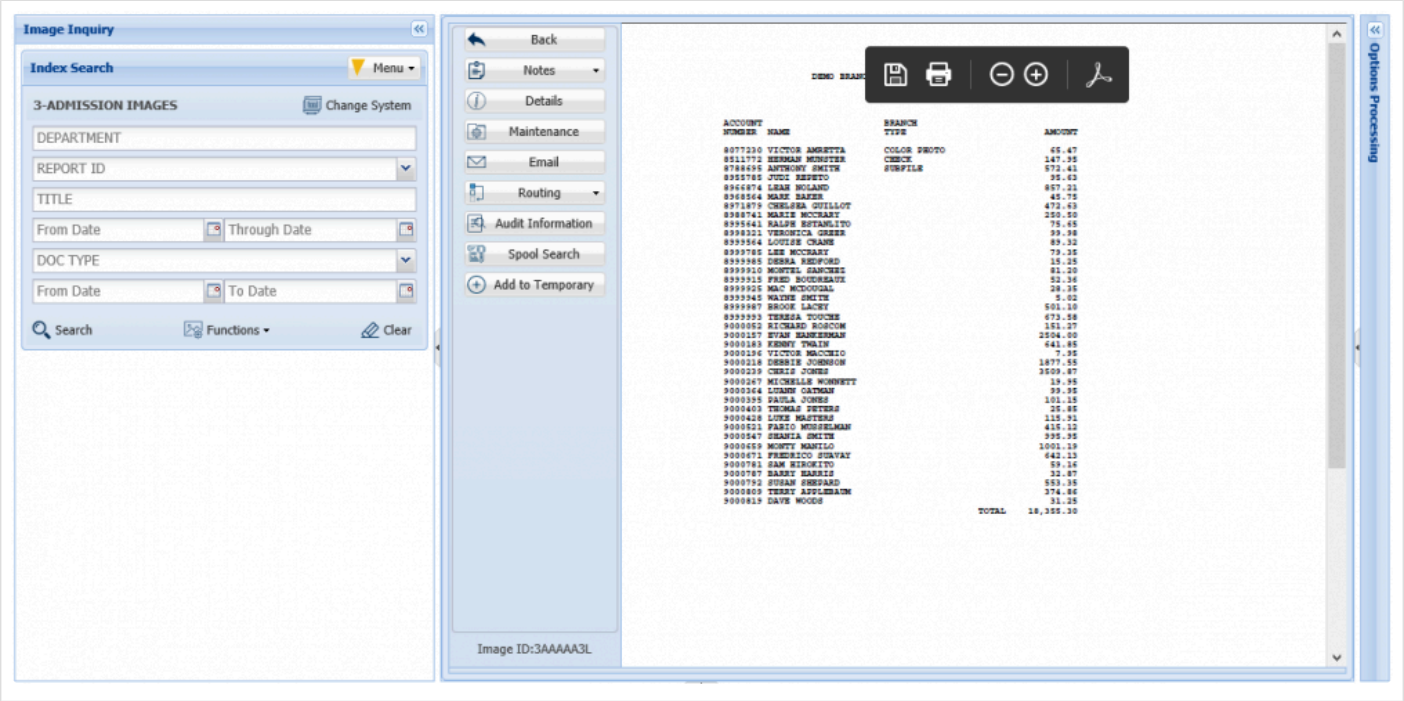
8.25. Spool File

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



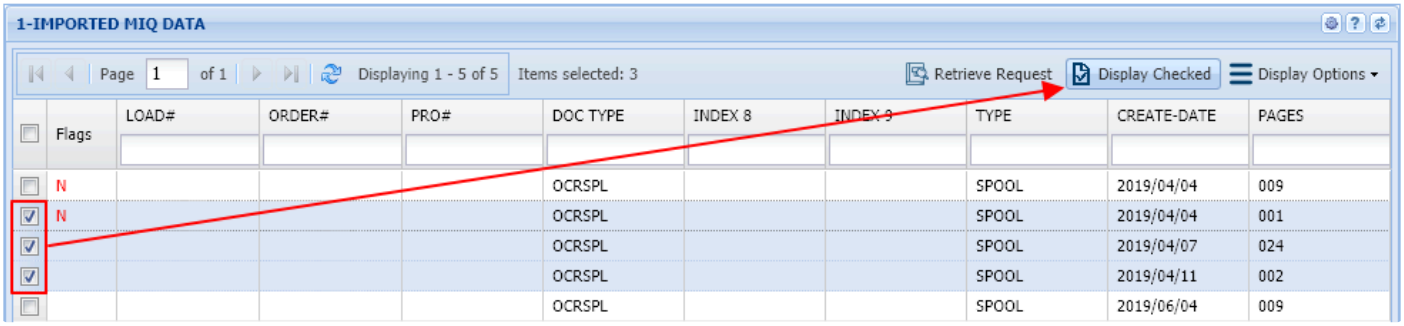
8.25.1. Display

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



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**.



8.25.2. Search and Extraction

To watch a video on this topic [CLICK HERE](#).

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

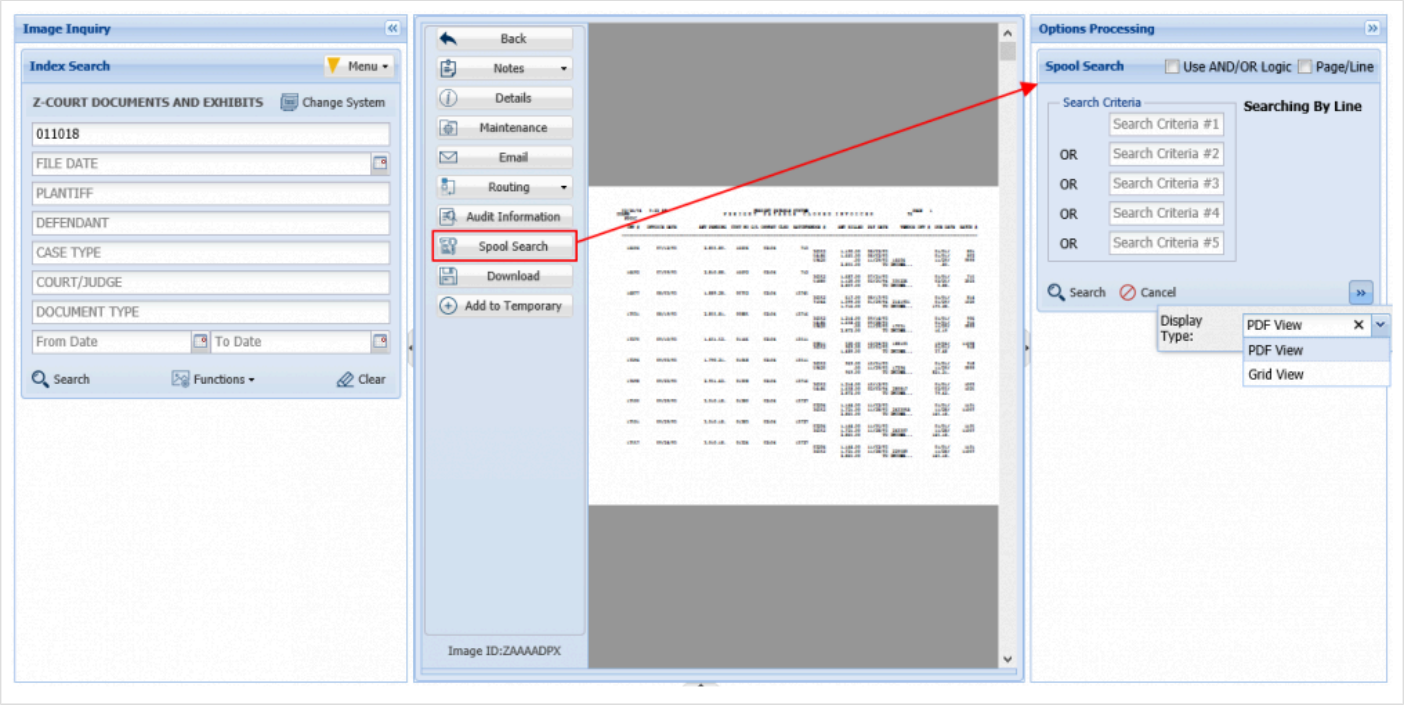


Image Inquiry
Index Search
Menu
Z-COURT DOCUMENTS AND EXHIBITS
Change System
011018
FILE DATE
PLANTIFF
DEFENDANT
CASE TYPE
COURT/JUDGE
DOCUMENT TYPE
From Date
To Date
Search
Functions
Clear
Back
Notes
Details
Maintenance
Email
Routing
Audit Information
Spool Search
Download
Add to Temporary
Image ID:ZAAAADPX
Options Processing
Spool Search
Use AND/OR Logic
Page/Line
Search Criteria
Searching By Line
Search Criteria #1
OR
Search Criteria #2
OR
Search Criteria #3
OR
Search Criteria #4
OR
Search Criteria #5
Search
Cancel
Display Type:
PDF View
PDF View
Grid View

PDF View:

Image

DEMO BRANCHING REPORT

ACCOUNT NUMBER	NAME	BRANCH TYPE	AMOUNT
8077230	VICTOR AMRETTA	COLOR PHOTO	65.47
8511772	HERMAN MUNSTER	CHECK	147.95
8788695	ANTHONY SMITH	SUBFILE	572.41
8955785	JUDY REPETO		95.63
8966874	LEAH NOLAND		857.21
8968564	MARK BAKER		45.75
8971879	CHELSEA GUILLOT		472.63
8988741	MARIE MCCRARY		250.50
8995641	RALPH ESTANLITO		75.65
8998321	VERONICA GREER		99.98
8999564	LOUISE CRANE		89.32
8999785	LEE MCCRARY		79.35
8999985	DEBRA REDFORD		15.25
8999910	MONTEL SANCHEZ		81.20
8999915	FRED BOUDREAUX		52.36
8999925	MAC MCDOUGAL		28.35
8999945	WAYNE SMITH		5.02
8999987	BROOK LACEY		501.10
8999993	TERESA TOUCHE		673.58
9000052	RICHARD ROSCOM		151.27
9000157	EVAN HANKERMAN		2504.00
9000183	KENNY TWAIN		641.85
9000196	VICTOR MACCHIO		7.95
9000218	DEBBIE JOHNSON		1877.55
9000239	CHRIS JONES		3509.87
9000267	MICHELLE WONNETT		19.95
9000364	LUANN OATMAN		99.95

Grid View:

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

Spool Grid

SALES 1 BRANCHING REPORT 01-03-2005

Grid to Excel

	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: *ANY        Profile: BRANCH

When selecting lines for XLS file, start at line 009 and end at line 066

Use lines 006 007 000 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 NE to the value *BLANKS
    And/Or (AN/OR) __  (Optional)                  *BLANKS = a blank
  Pos 000 of detail line is EQ/NE EQ to the value
                                                   *BLANKS = a blank
Delete Code: _ (D to Delete)
F3 =Exit                      F12 =Cancel                Enter =Continue

MA    B                                                          06/052
```

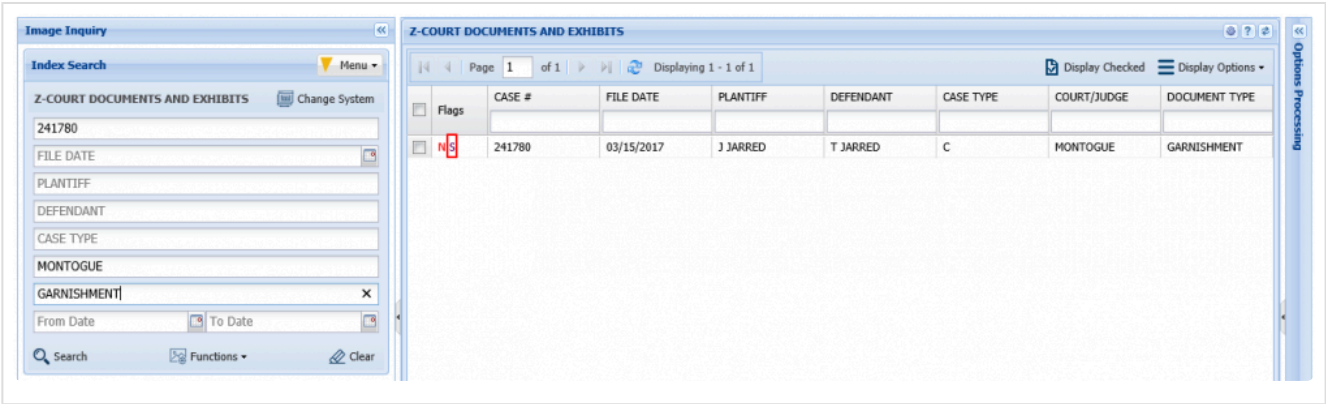
8.26. Stapling

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.*)

<u>If the primary document is stapled to another image:</u>

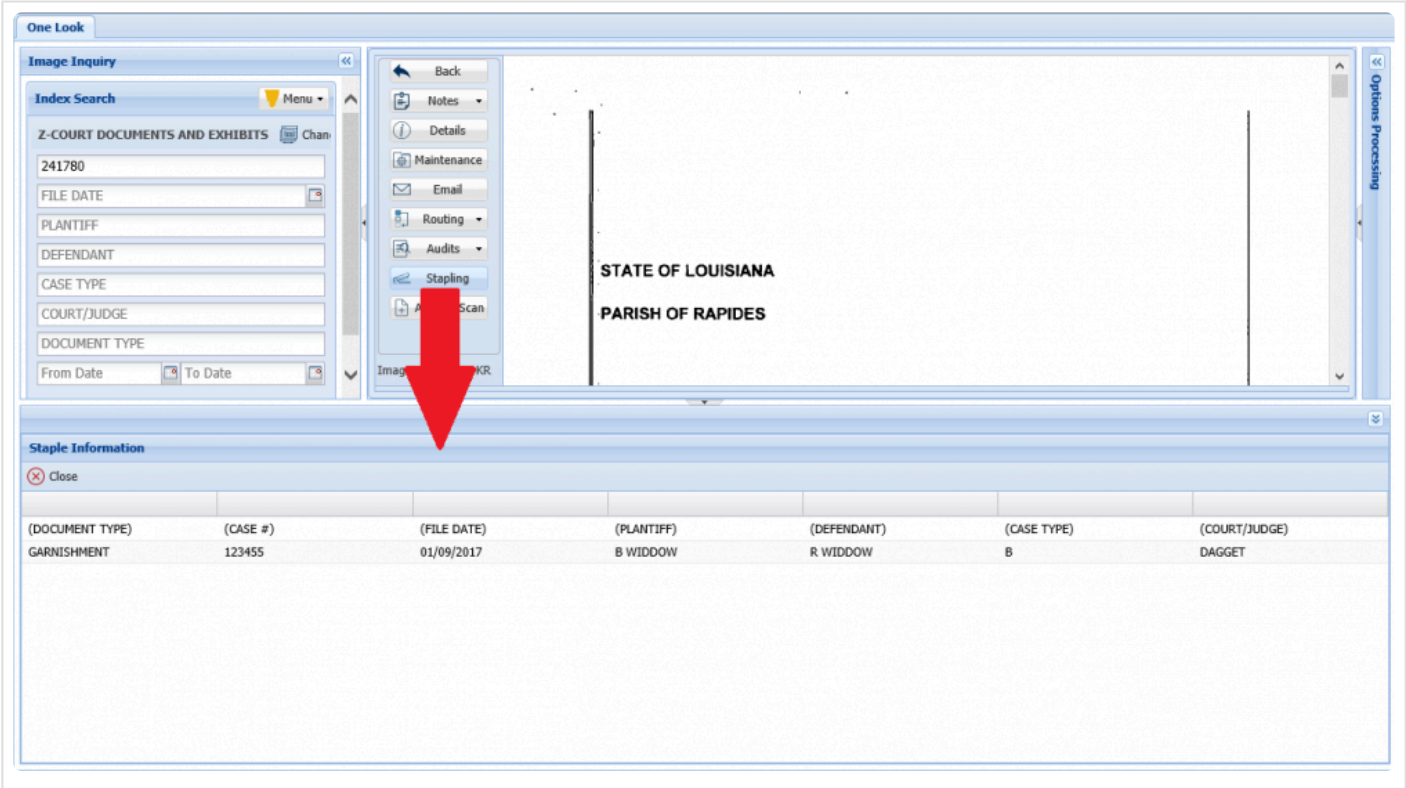
- The system will display 'S' next to the record.



- The button

will be available.

- 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.

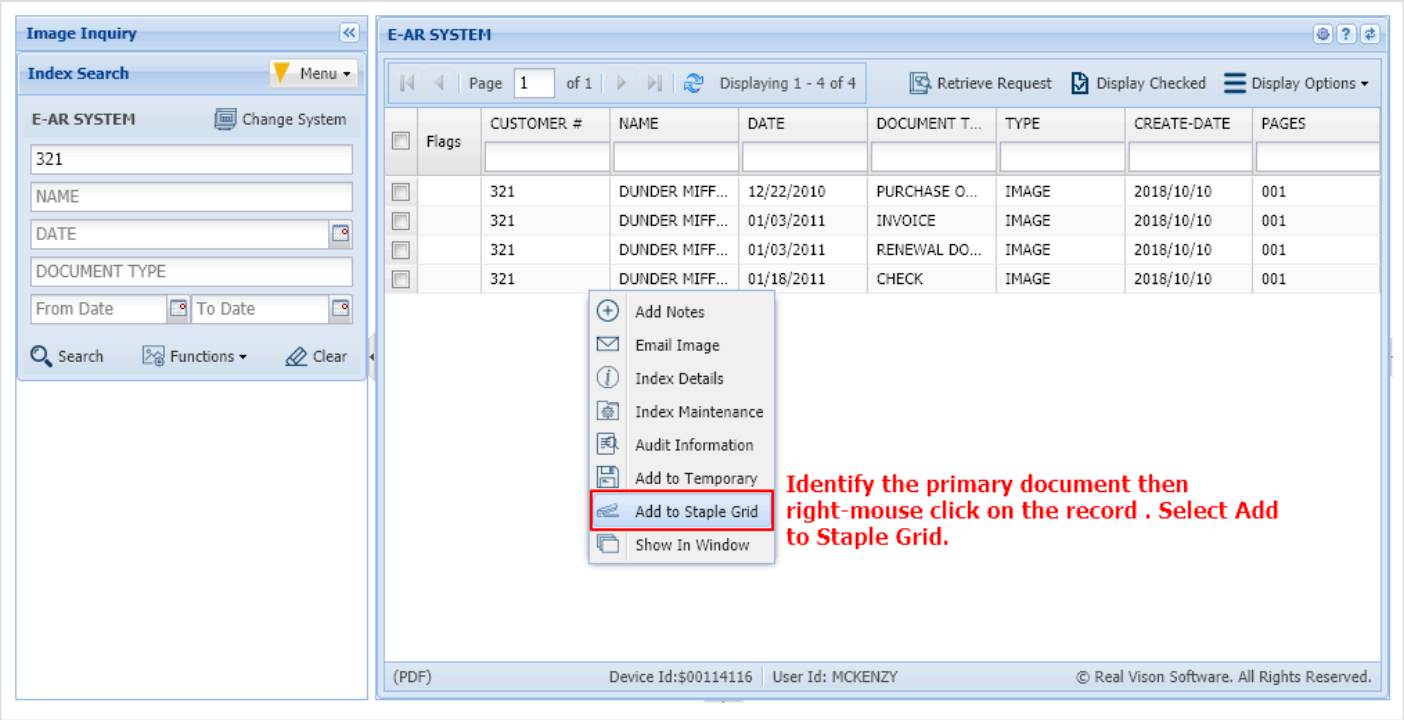


For further details on Automatic Stapling and the setup requirements, refer to Chapter 18 (Auto-Stapling) in the RVI 90 IBMi User Manual.

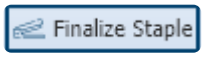
2. **Manual Stapling** The bundling process is triggered by the user adding a primary document and supporting documents from any available system code to the Staple Grid then selecting the Finalize button from the Staple Grid.

To watch a video on this topic CLICK HERE

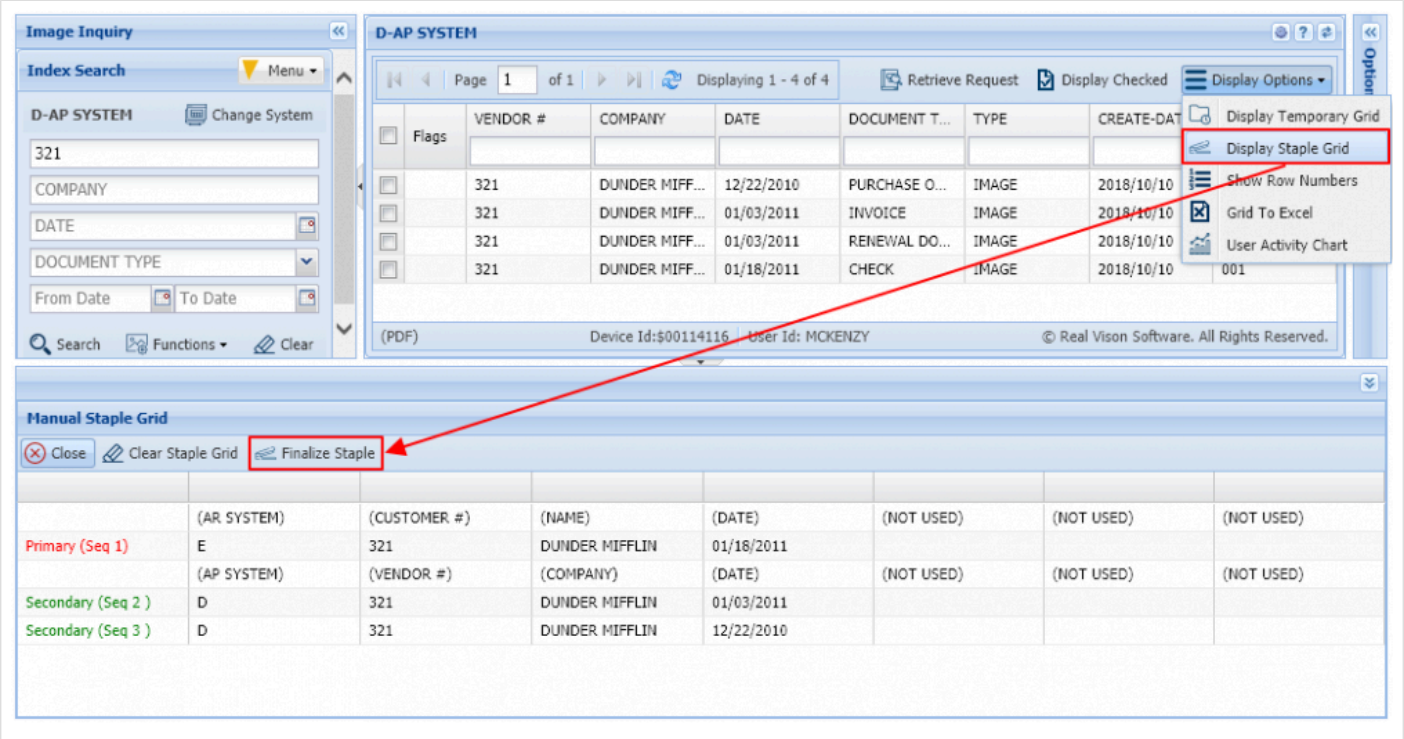
These buttons operate under the rules of option security. If a user doesn't have authority to staple, they cannot use this feature.



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 

to complete the staple process.

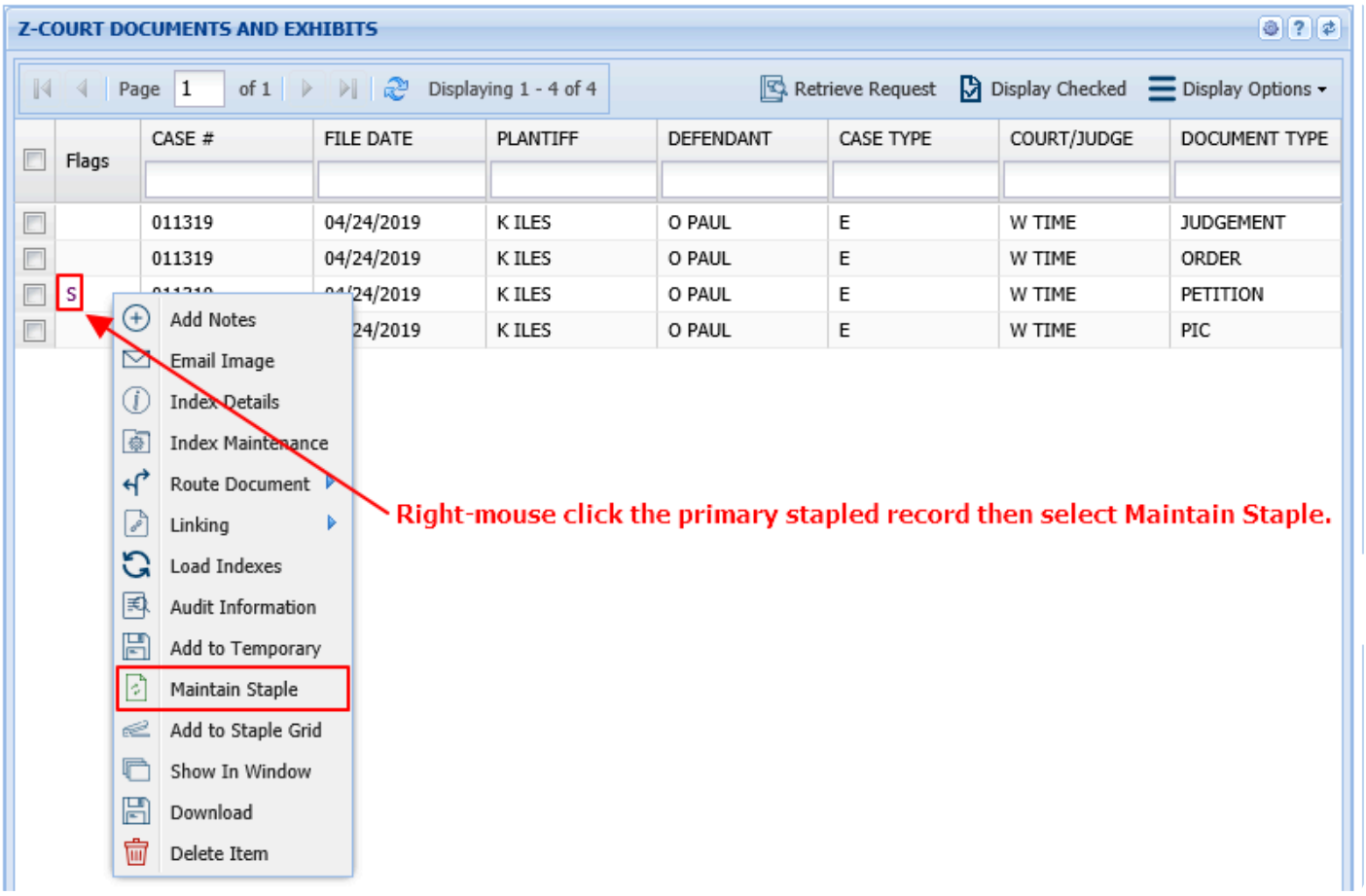


8.26.1. Add Additional Documents to a Stapled Bundle

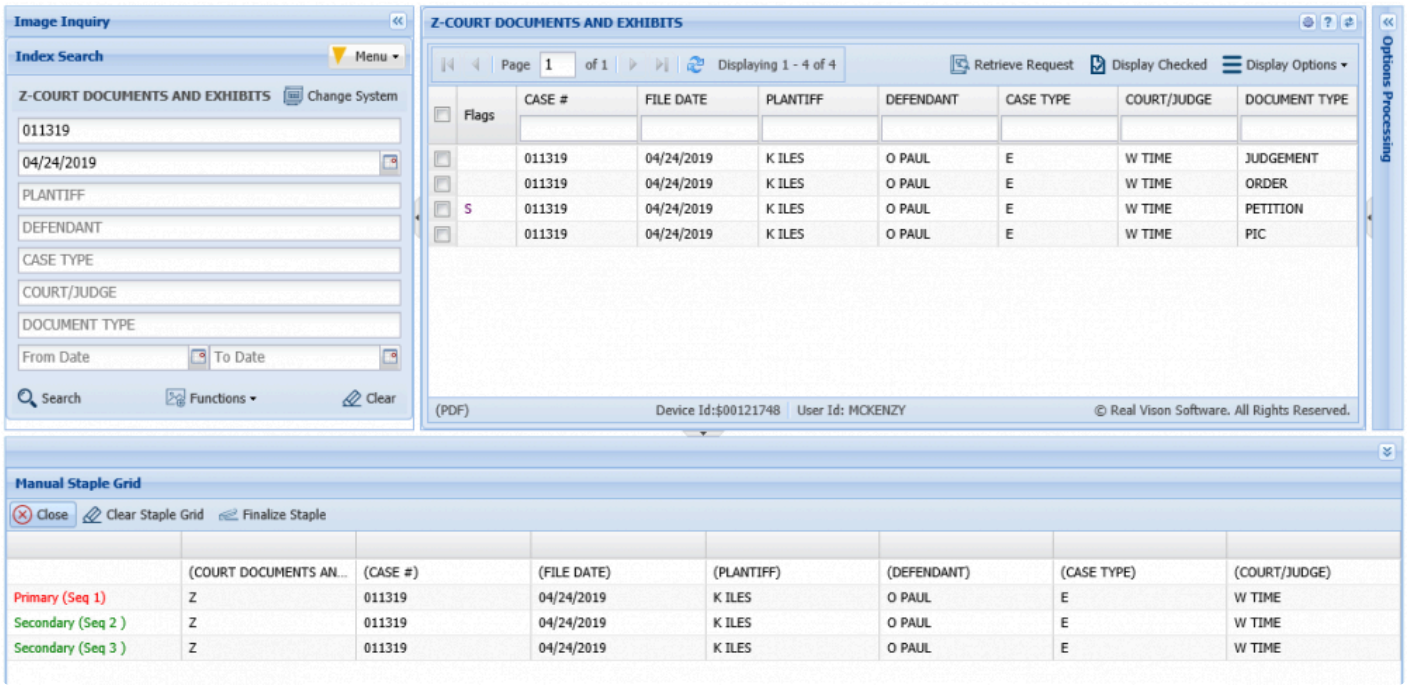
(*Before you begin, the staple grid must be cleared. Select* ***Display Options/Display Staple Grid/Clear Staple Grid****.*)

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

2. Select **Maintain Staple**.



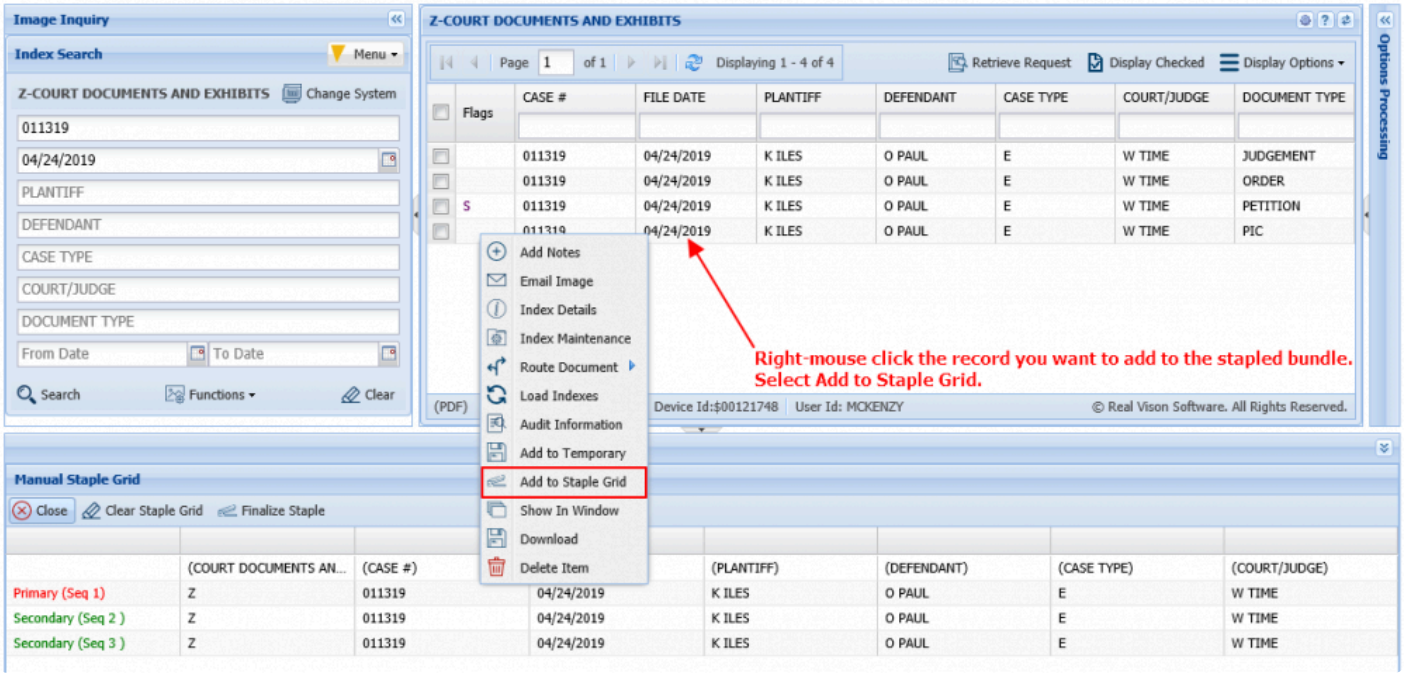
The Staple Grid will open with a list of the existing documents in the stapled bundle.



3. Navigate to the record you want to add to the stapled bundle.

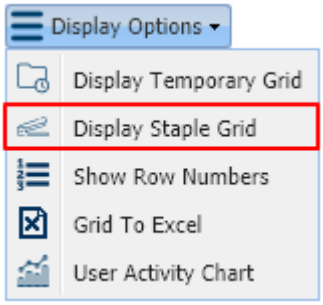
4. Right-mouse click the record you want to add to the stapled bundle.

5. Select **Add to Staple Grid**.

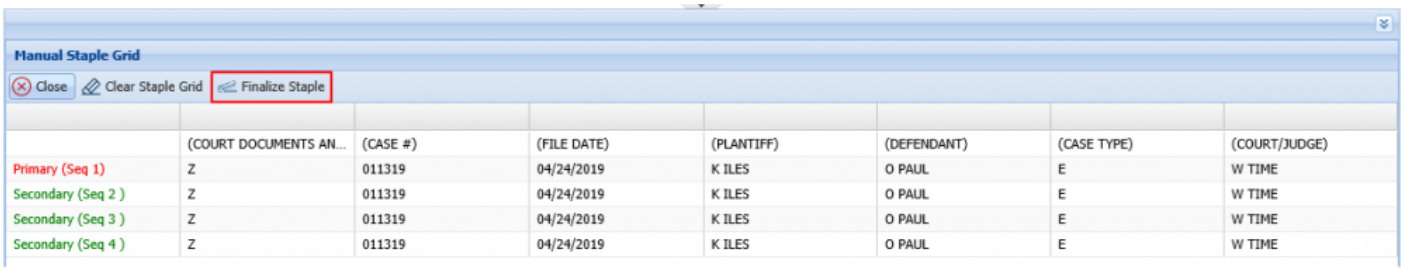


Stapled records do not have to belong to the same System. In this example, we are adding a document from System C to a stapled bundled in System Z.

6. Select Display Options / **Display Staple Grid**.

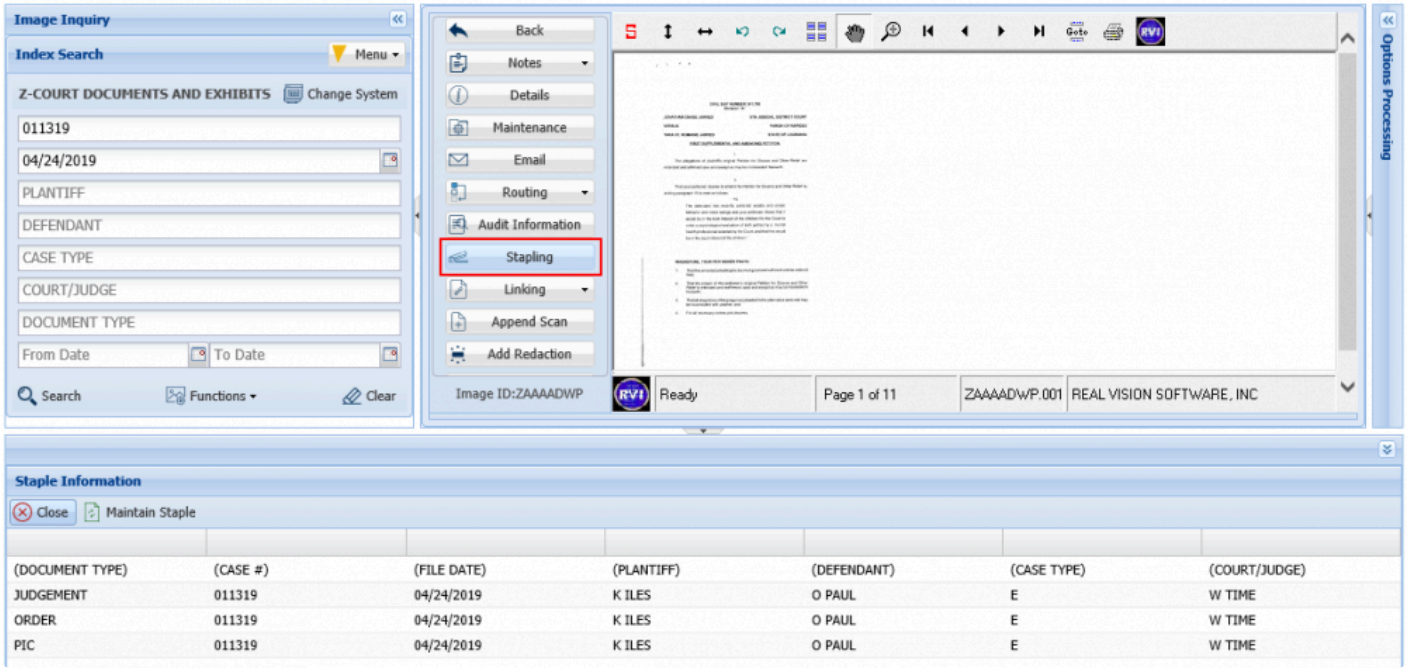


7. Select **Finalize Staple** to add the new document to the existing bundle.



	(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
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**.



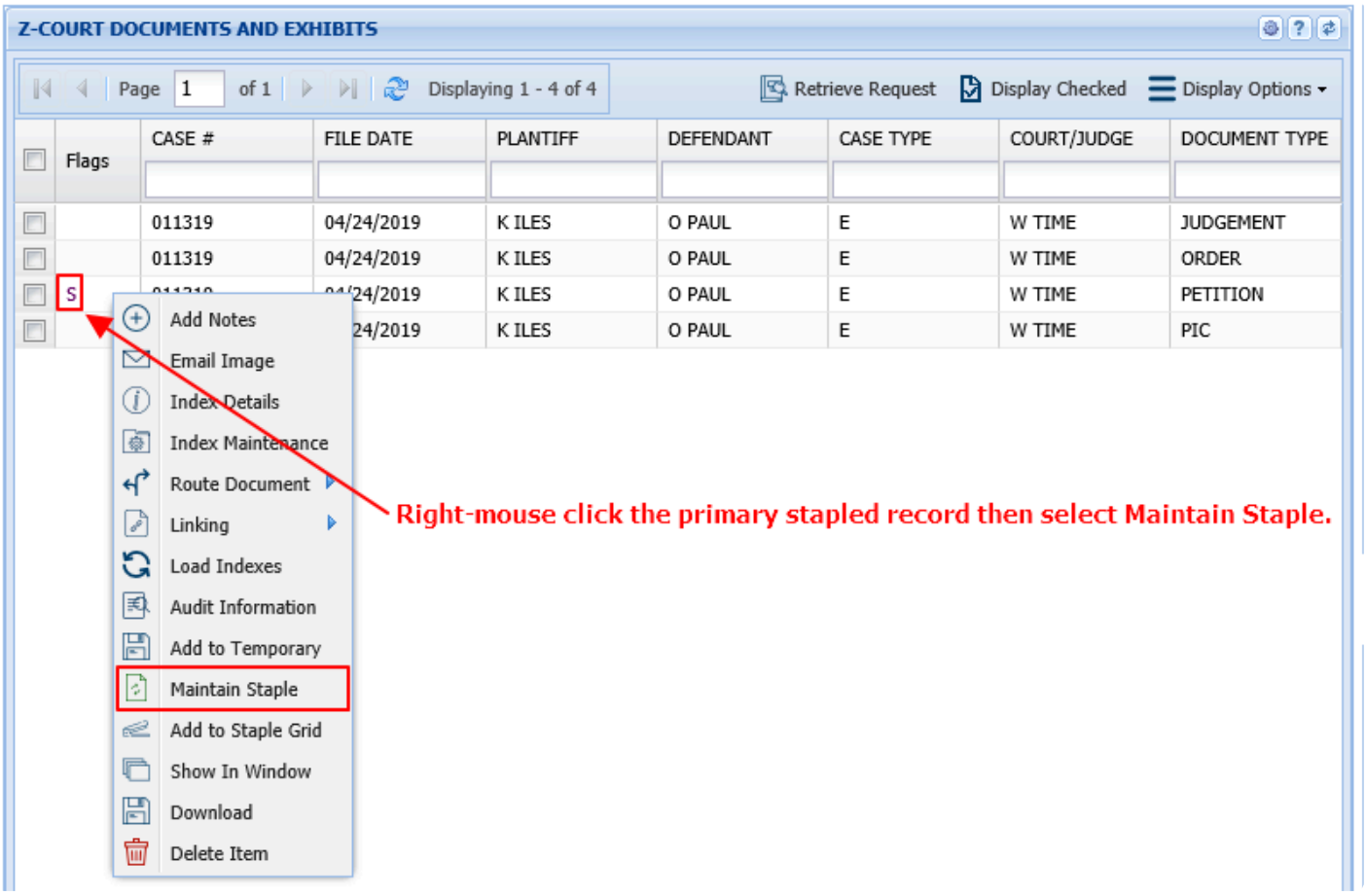
Double-click an entry in the Staple Grid to view that document.The document will open in a new window.

8.26.2. Resequence Stapled Documents

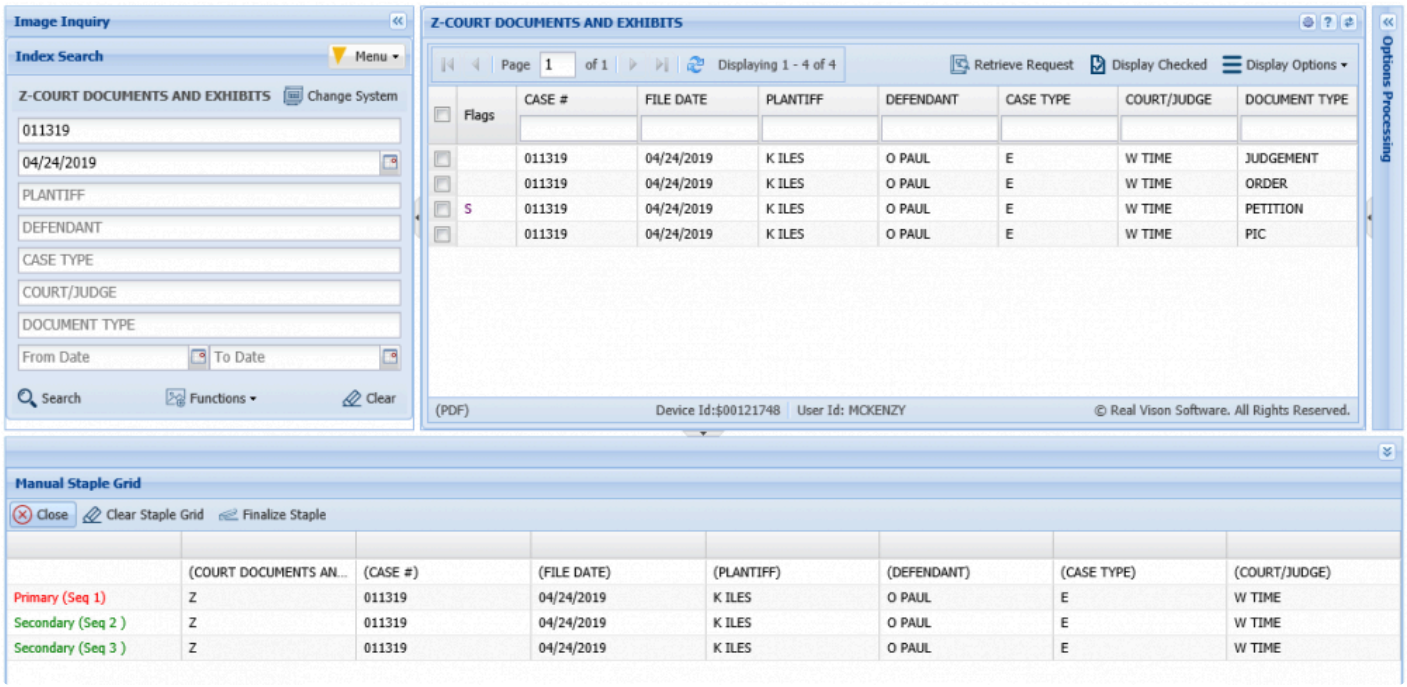
(*Before you begin, the staple grid must be cleared. Select* ***Display Options/Display Staple Grid/Clear Staple Grid****.*)

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

2. Select **Maintain Staple**.



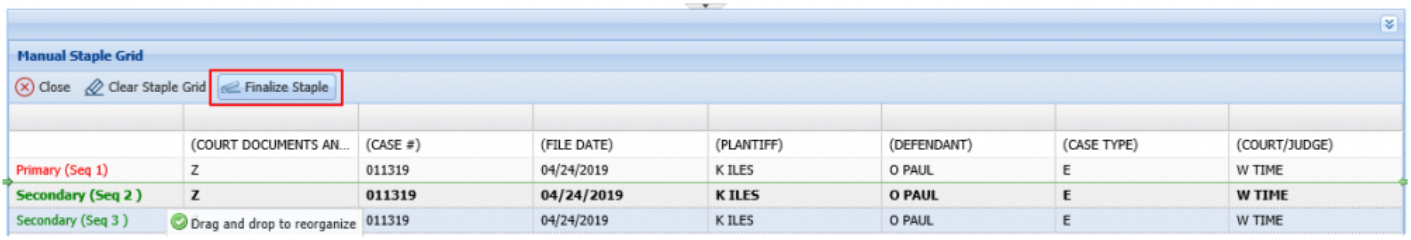
The Staple Grid will open with a list of the existing documents in the stapled bundle.



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.



The reorganization of the records is now complete!

8.26.3. Delete a Stapled Bundle

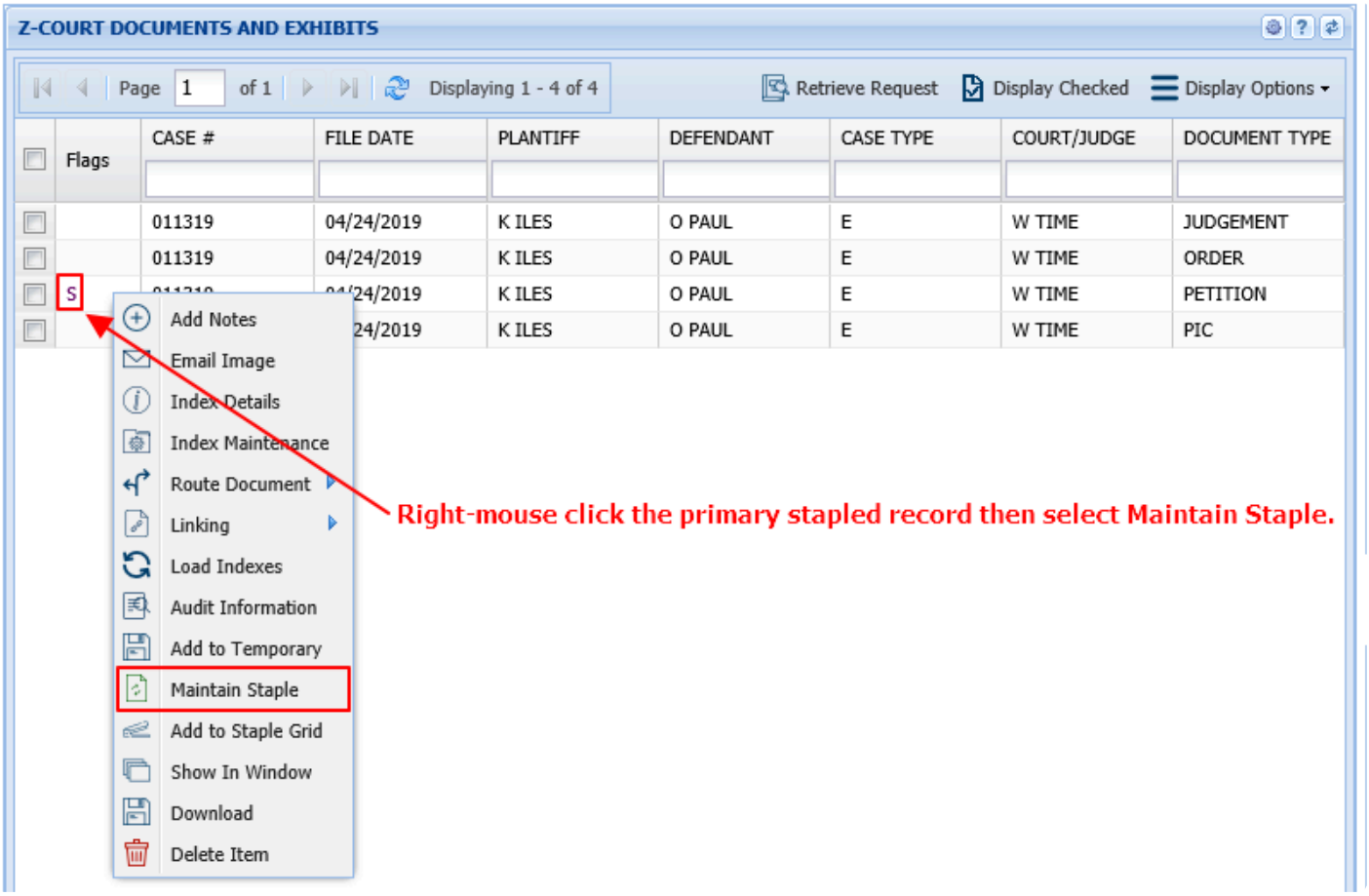
> This will delete the entire stapled bundle.

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

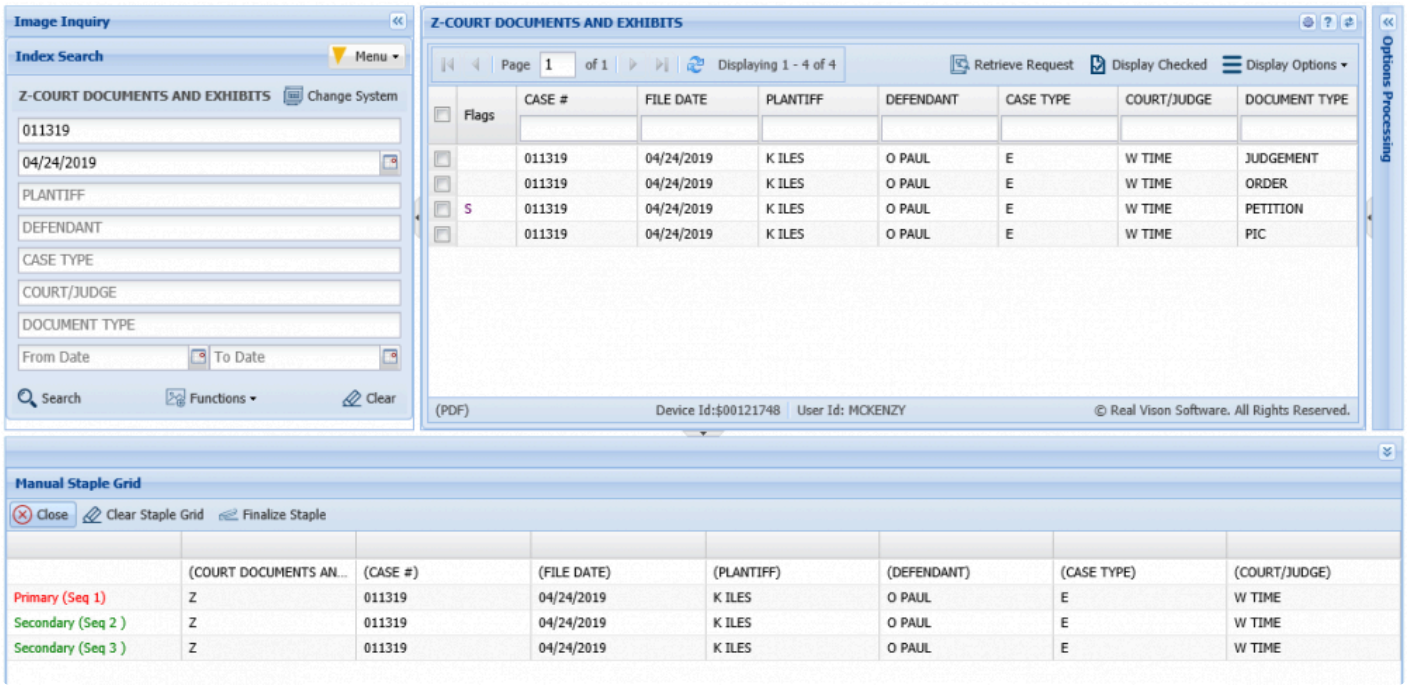
Staple Grid.)

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

2. Select **Maintain Staple**.

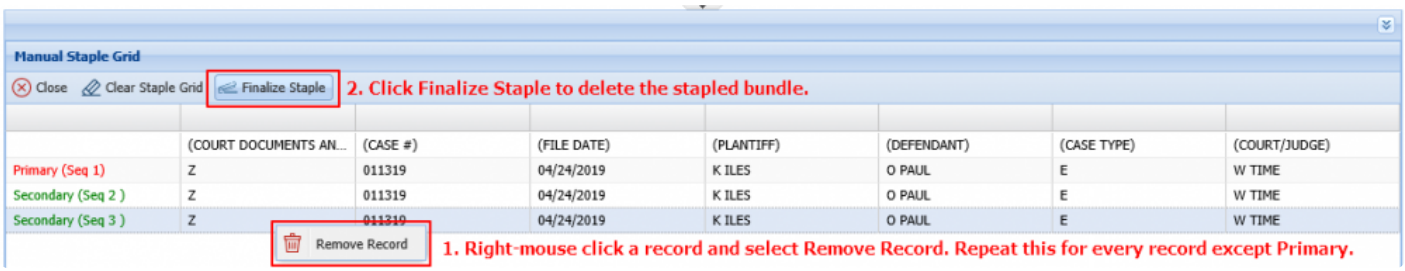


The Staple Grid will open with a list of the existing documents in the stapled bundle.



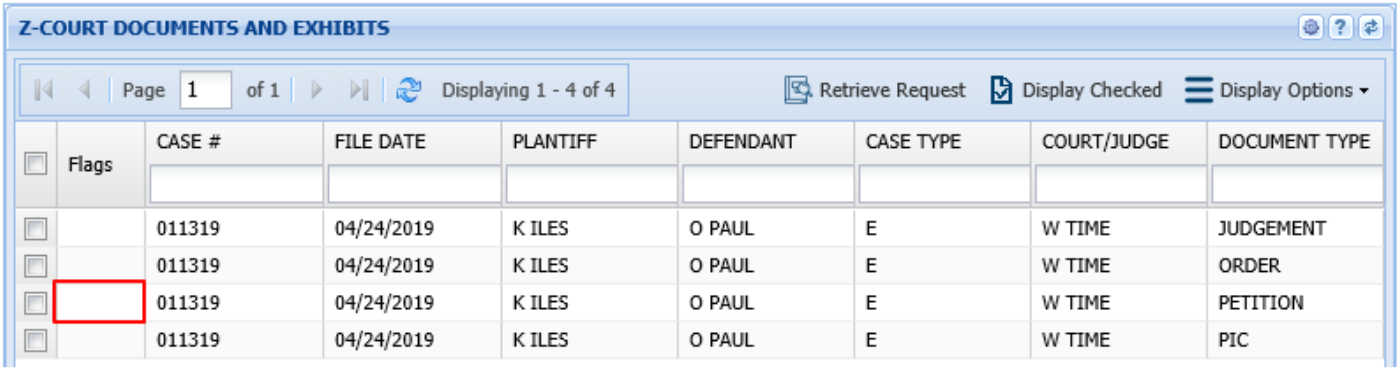
3. Right-mouse click the record you want to remove.

4. Select **Remove Record**.



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

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

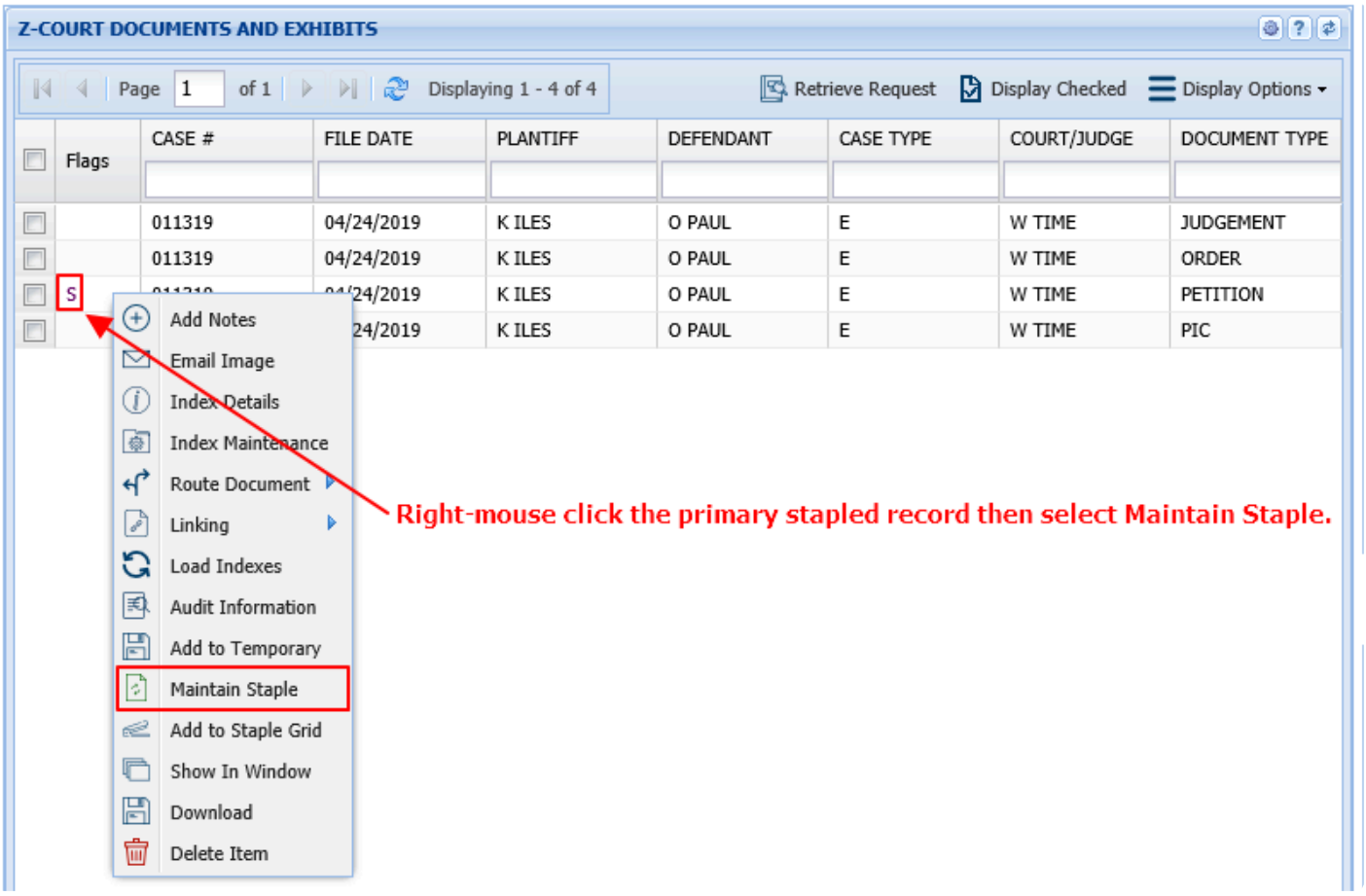


8.26.4. Remove a Document from a Stapled Bundle

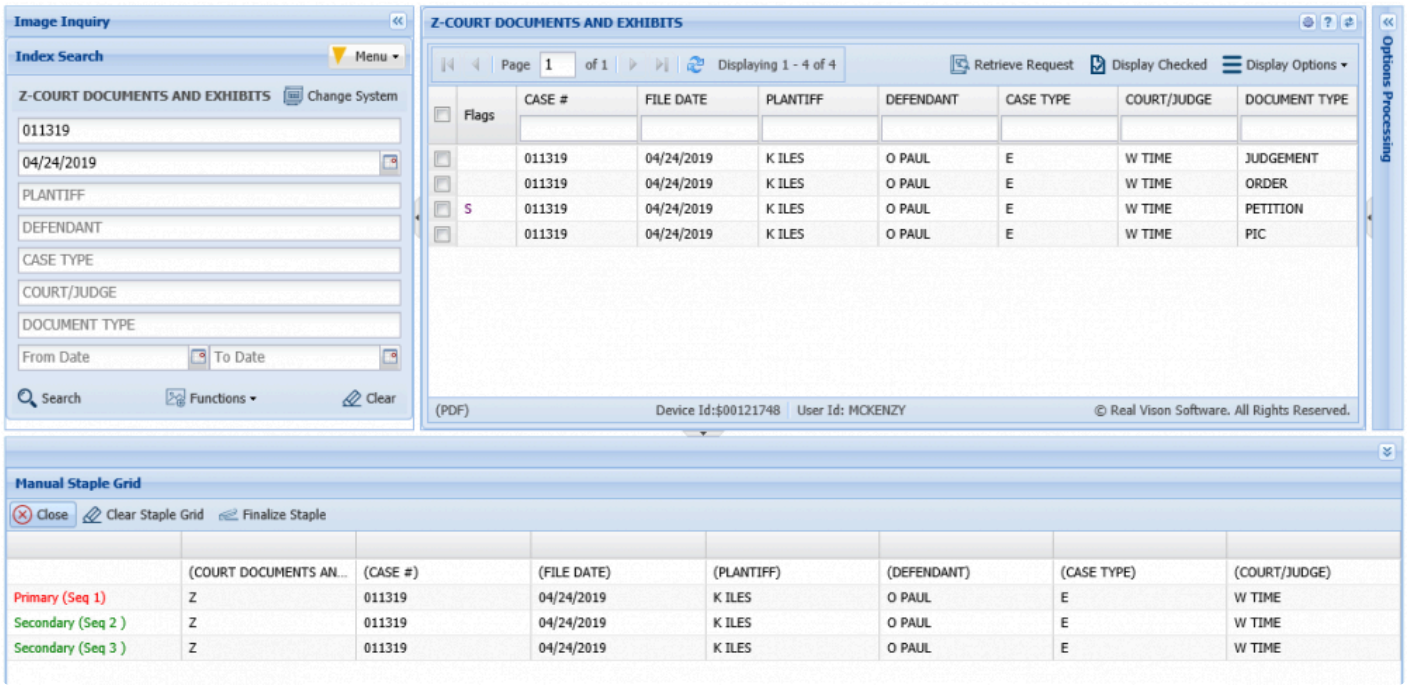
(*Before you begin, the staple grid must be cleared. Select* ***Display Options/Display Staple Grid/Clear Staple Grid****.*)

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

2. Select **Maintain Staple**.



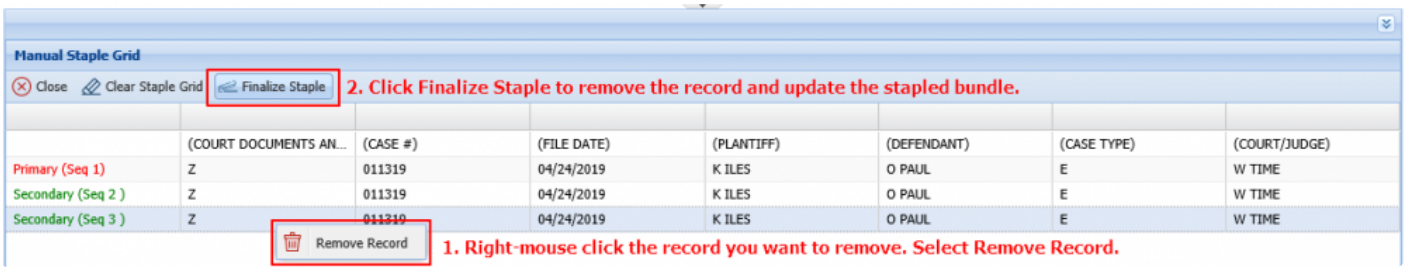
The Staple Grid will open with a list of the existing documents in the stapled bundle.



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

> The Primary (Seq 1) can not be removed.

4. Select **Remove 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

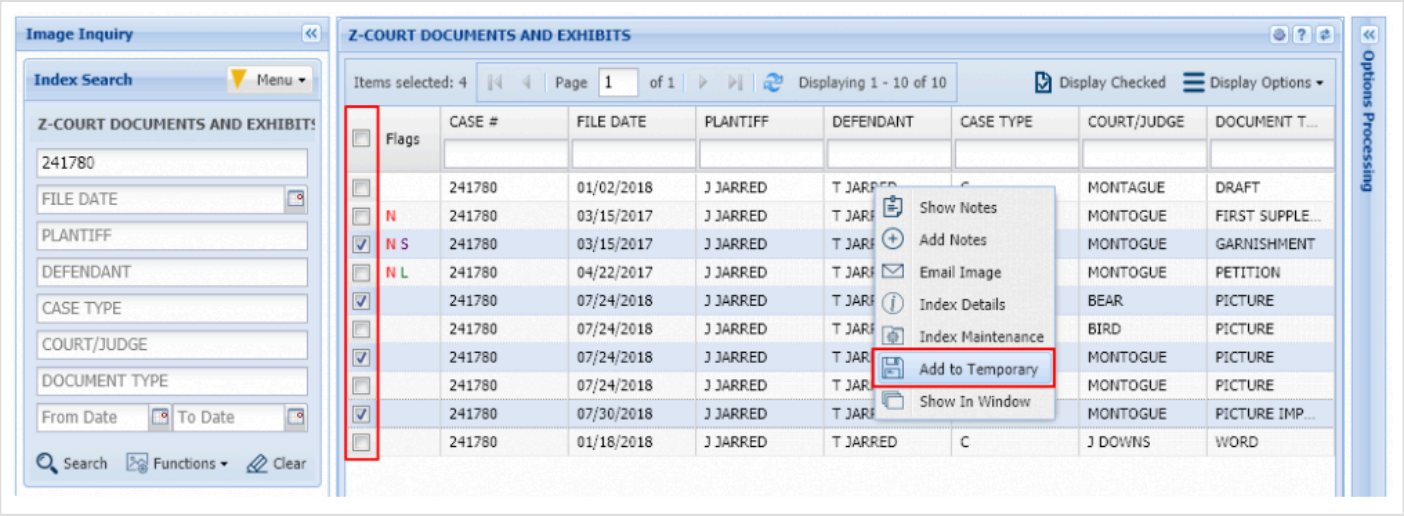
Temporary Folder provides a holding area where users can store a copy of any document from any system

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.*)

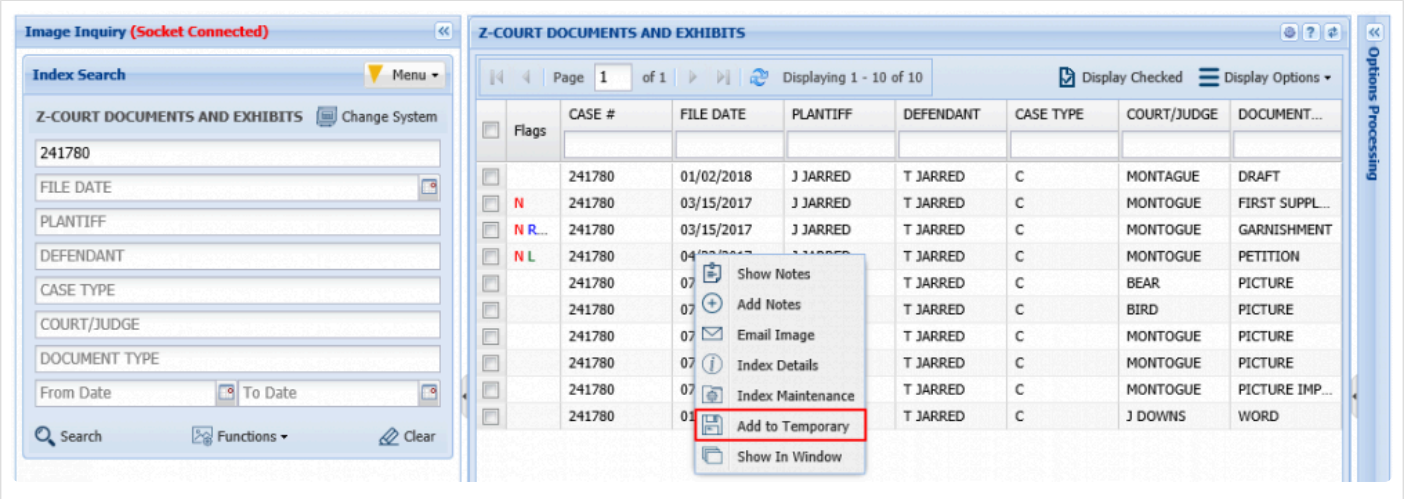
Documents can be added to Temporary Folder in 3 ways:

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. Right-mouse click anywhere within the sub file list and select 'Add to Temporary'.

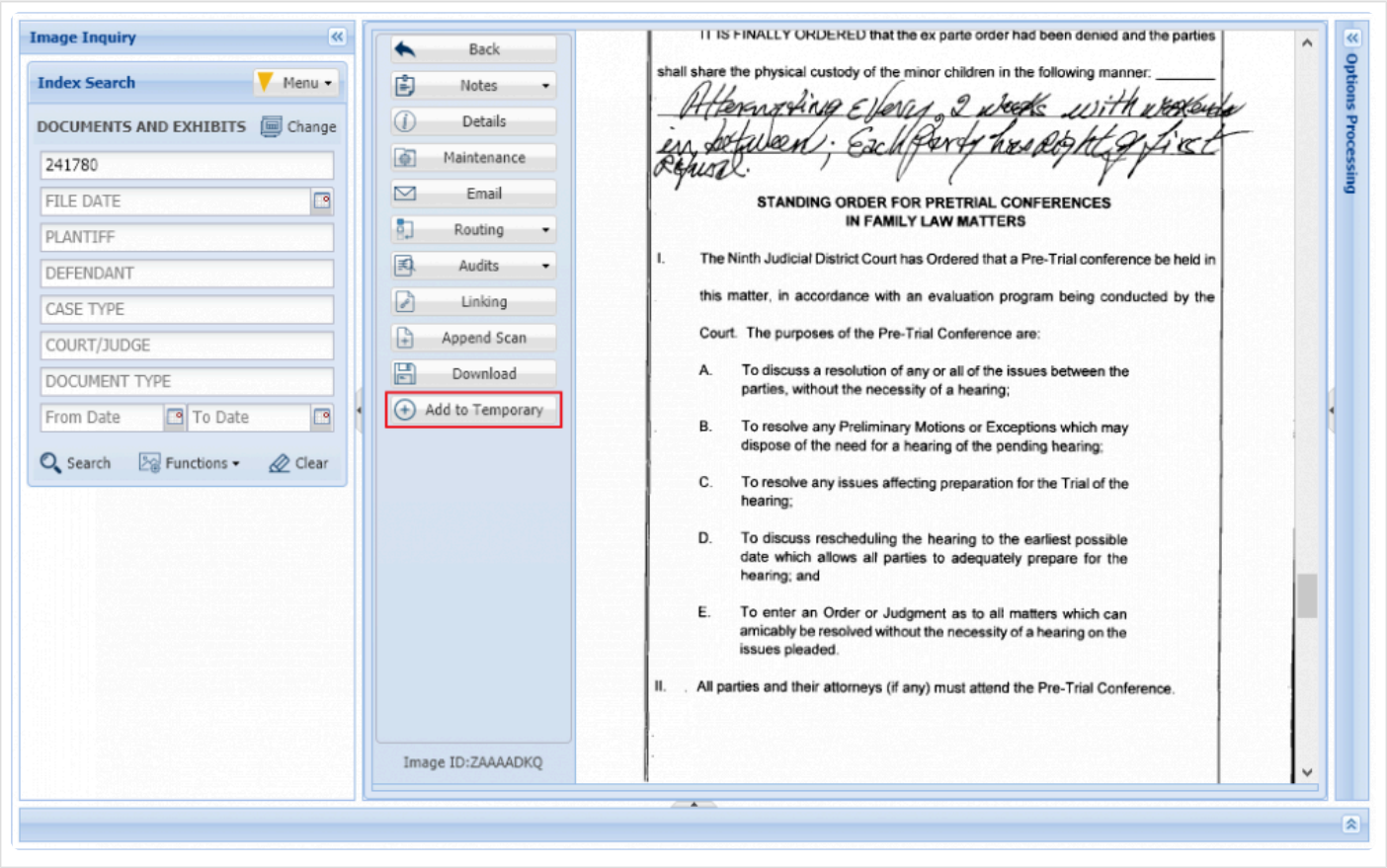


Option 2:
From the sub-file list of search results, right-mouse click a single record and select 'Add to Temporary'.



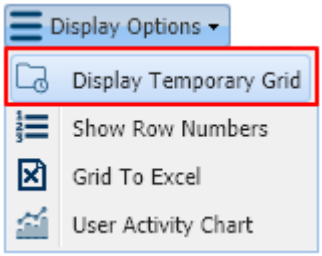
Option 3:

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

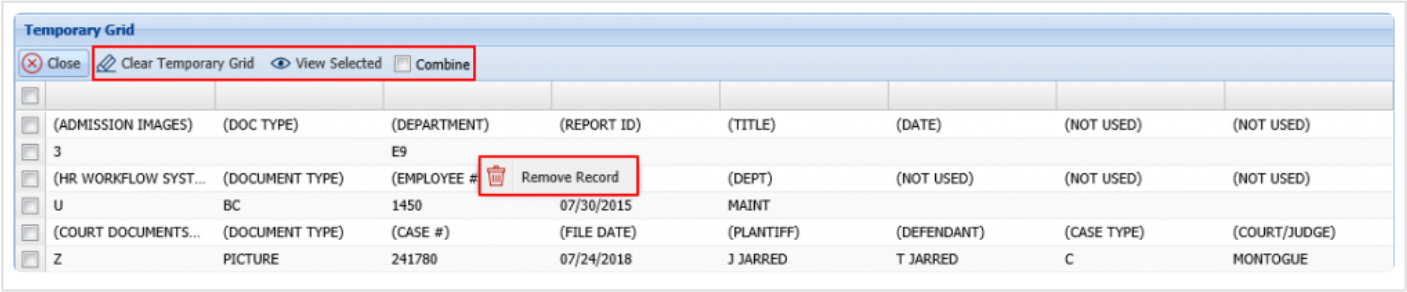


The Temporary Grid can be displayed by selecting Display Options, Display Temporary Grid from the top right-hand corner of the One Look window OR display a document from any system and select Display

Temp Grid from the left side functions.



Temporary Grid Features:

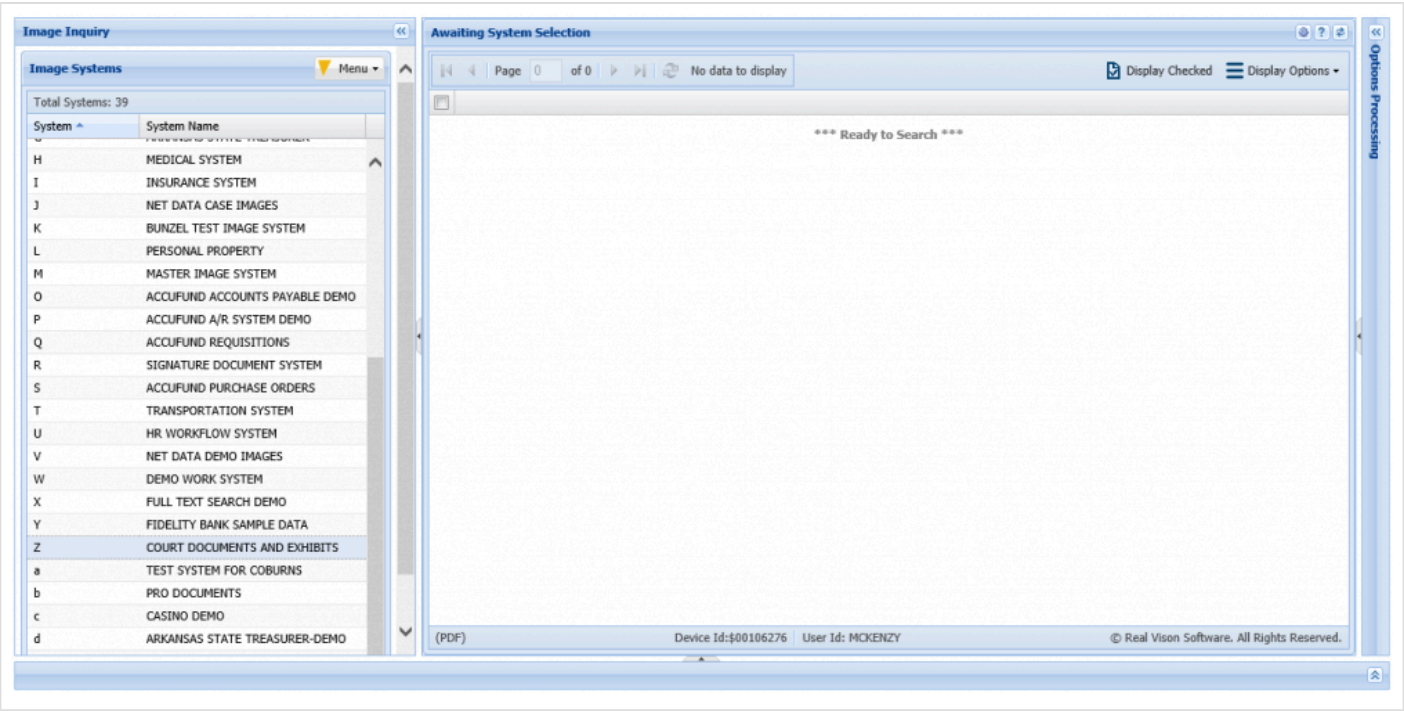


Clear Temporary Grid: Removes all items from the temporary folder and grid.
Remove Record: Remove items from the temporary folder and grid by right-mouse clicking a line item and selecting Remove Record.
View Selected: Select the desired records by placing a check mark in the box to the left of the record 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

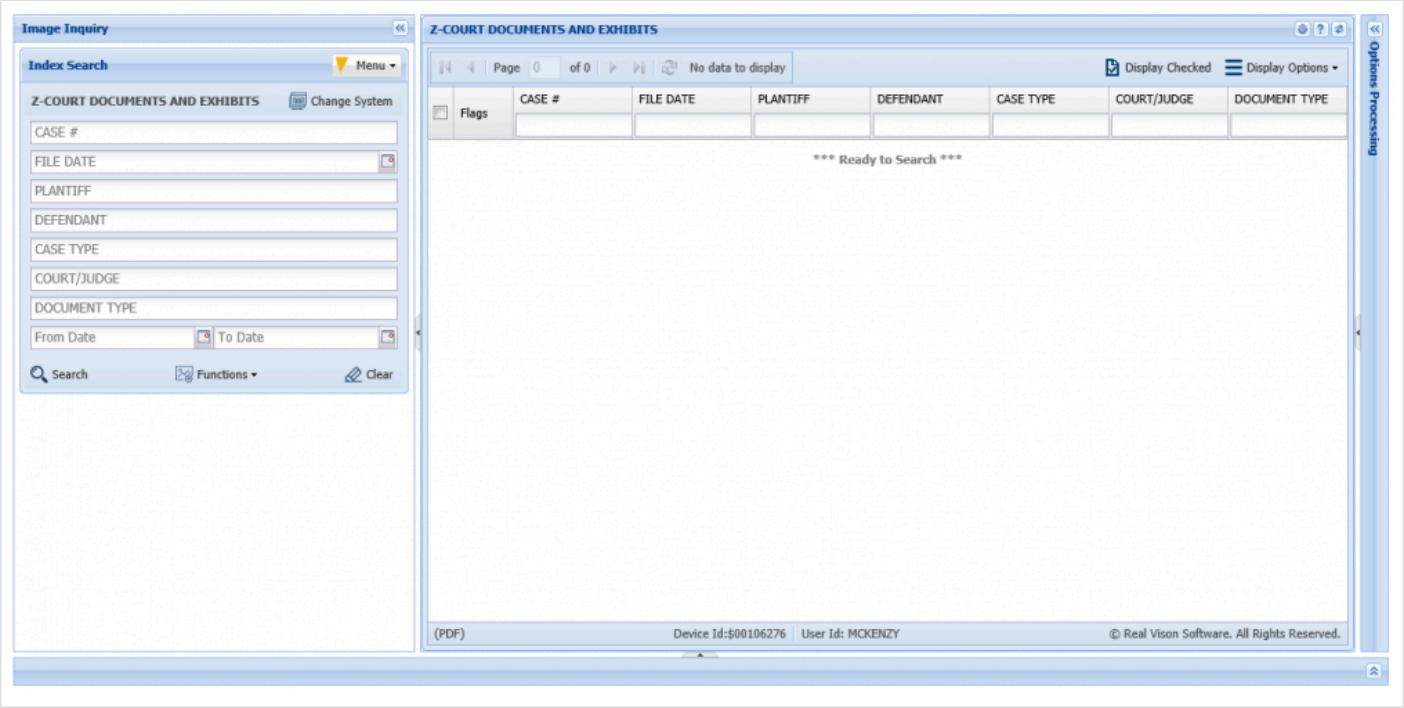
To watch a video on this topic CLICK HERE.

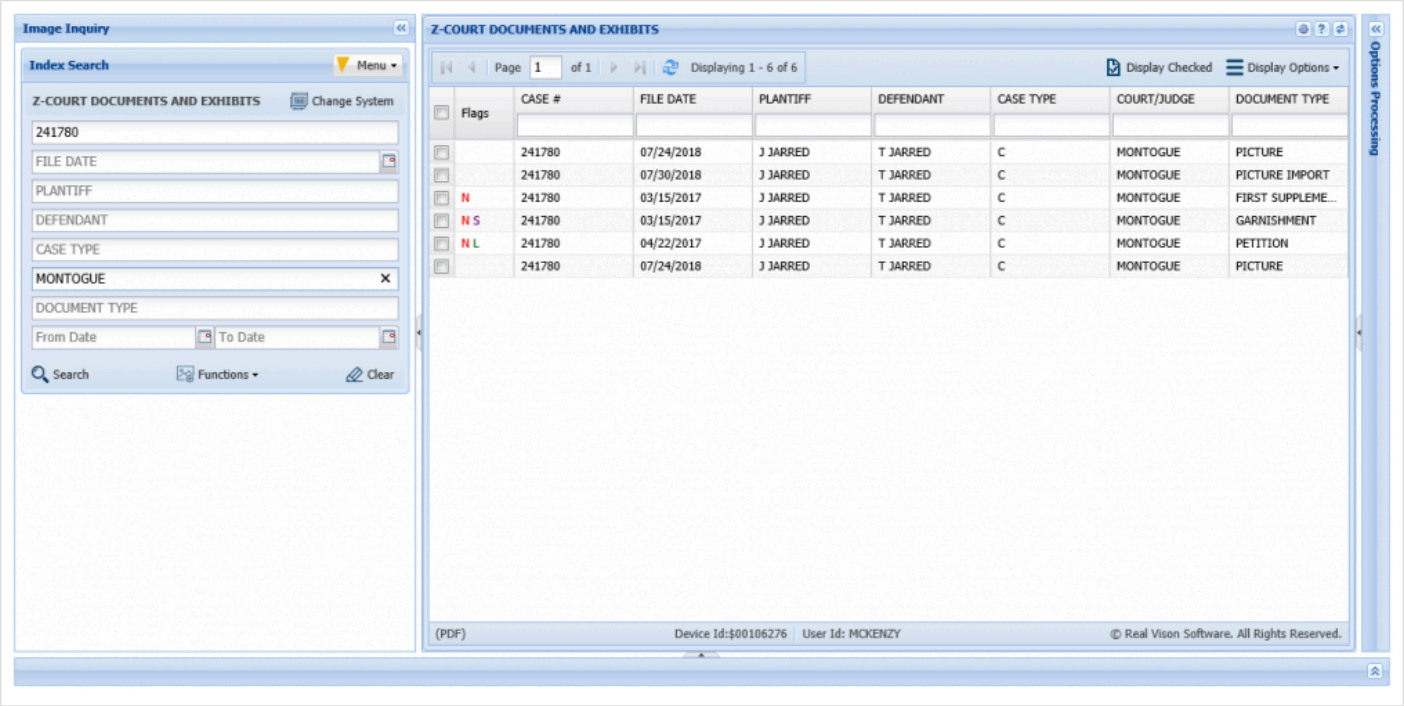
1. Using a single mouse click, select a system code for inquiry.



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.





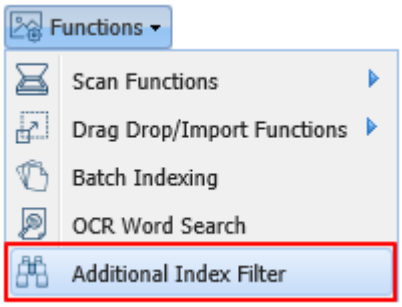
One Look will list up to 800 records per page. To view additional records, click the arrow buttons at the top of the window to move to the next page.

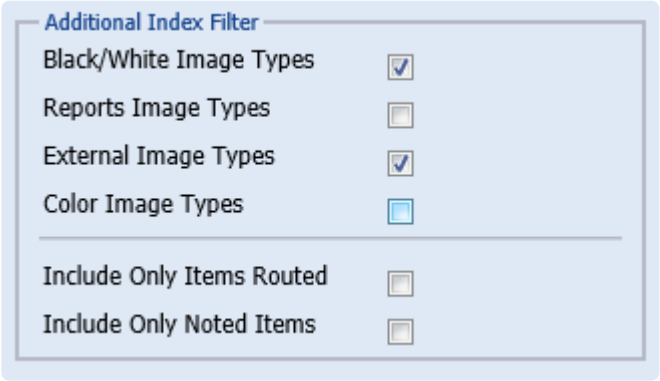
Use filtering to limit the number of records. For each index column displayed, there is a space to filter the

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.

Additional index filtering is available under the Image Inquiry, Index Search,

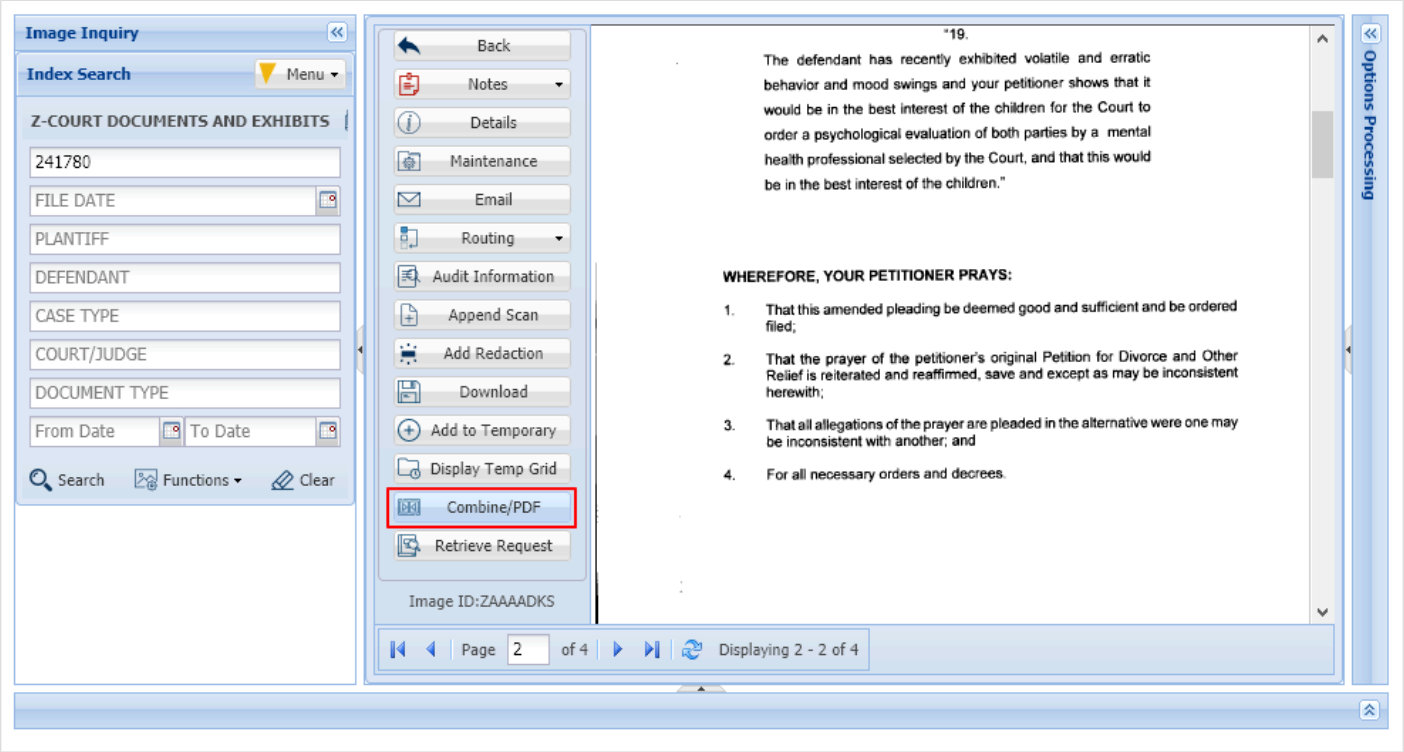
.



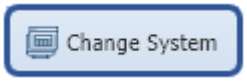


2. Double click the image to be viewed or select multiple check boxes for the items you want to display then click the Display Checked button. When Display Checked is used, the user will have the Combine PDF button to temporarily combine and display images (not Office documents) as a single PDF. The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

> ✻ If Combine PDF is enabled under Settings, the Combine PDF button will NOT appear. The system will automatically combine the files for you.



! 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 **RVI PC Viewer** then set their session settings to RVI to Viewer.

Move between systems by using the 

button located in the top right corner of the Index Search window.

8.29. Workflow

See **WorkBasket**

9. CUSTOM FUNCTIONS

Contact Real Vision Software to discuss custom functions.

9.1. Signature Capture

Contact Real Vision Software to discuss One Look Signature Capture setup.

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

9.2. Z-Options

Contact Real Vision Software 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 (*Requires additional parameter PGM=DOC003QWET*)
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 (*User selects scan profile.*)
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

&SELBOX = scanning profile name	**&DIRECTP** = Y direct view outside of internet

	frame
&OCX = *Y* for viewing inside the internet frame within the RVI PC Viewer	**&DELTYP** = *P* to view as PDF
&I1 through **I7** = index number	**&SCOLOR** = *Y* for color, *N* for black white
&ISYS = image system code	**&SOPT** = *Y* for scanning direct
&PROTECT = *Y* for surpressing the display of the index entry screen	**&RTNPGM** = *rviclosef* 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

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&

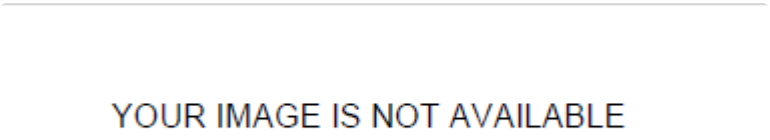
12. TROUBLESHOOTING

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 Real Vision Software support with the details.

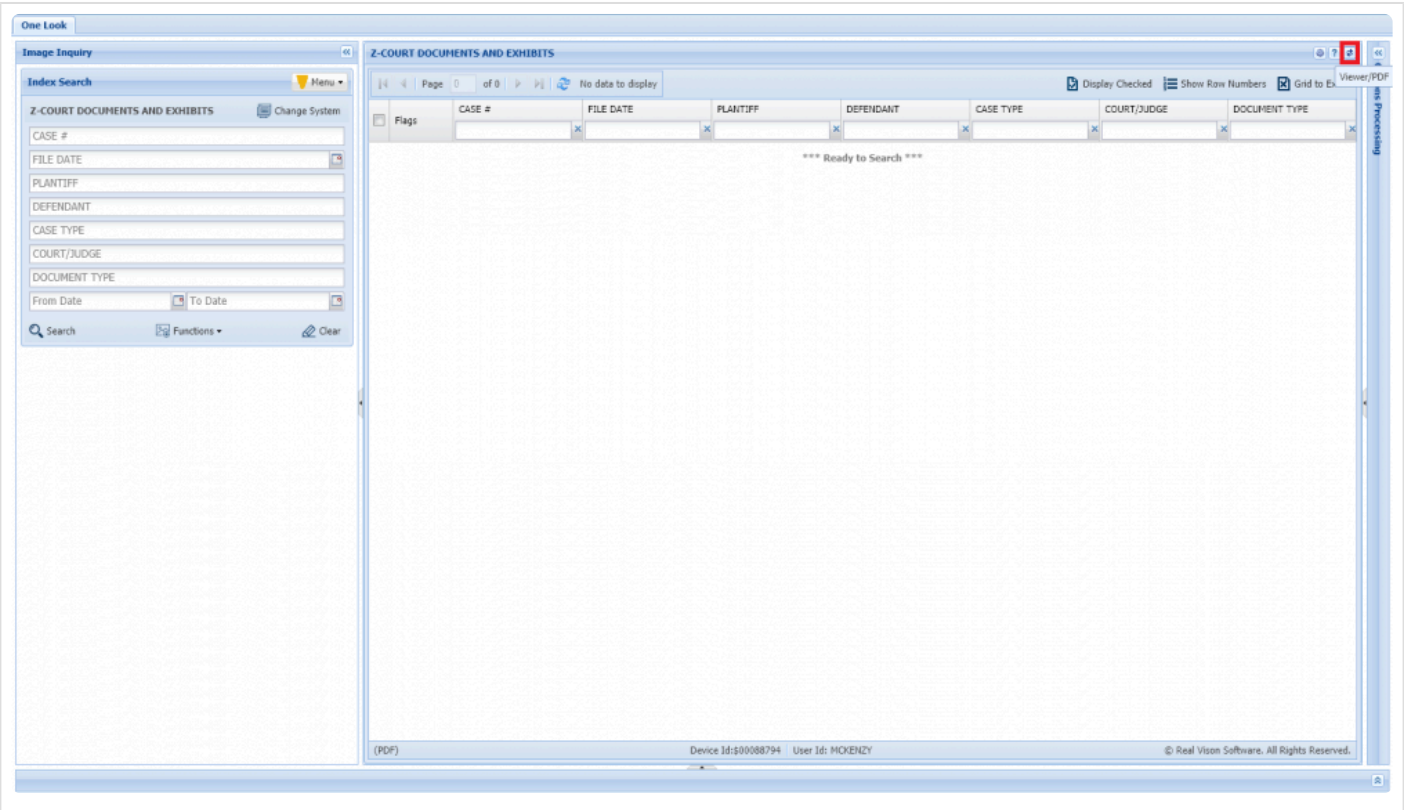
12.1. OEM Documents Will Not Display

Non Microsoft Office Documents

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



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

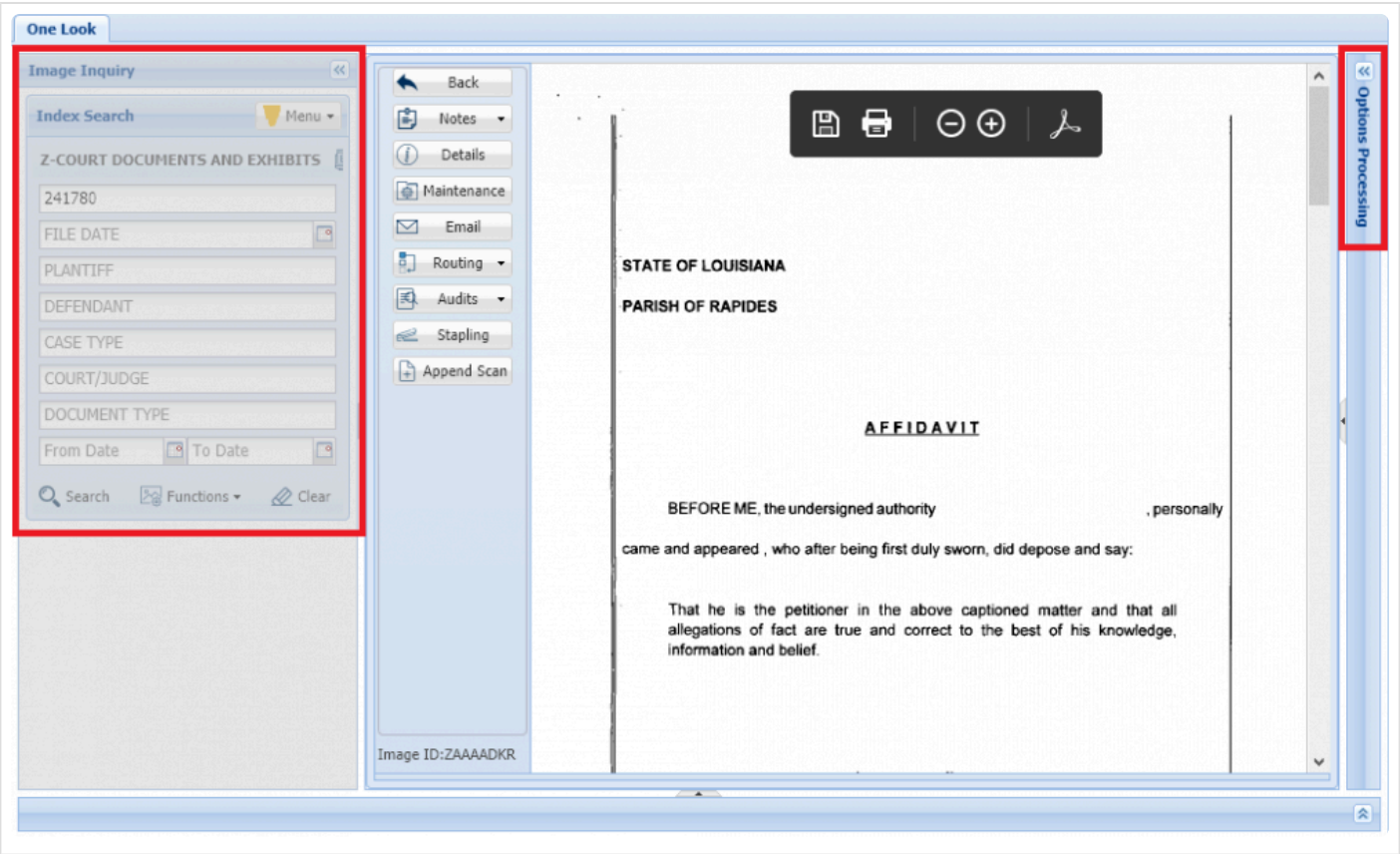


Microsoft Office Documents

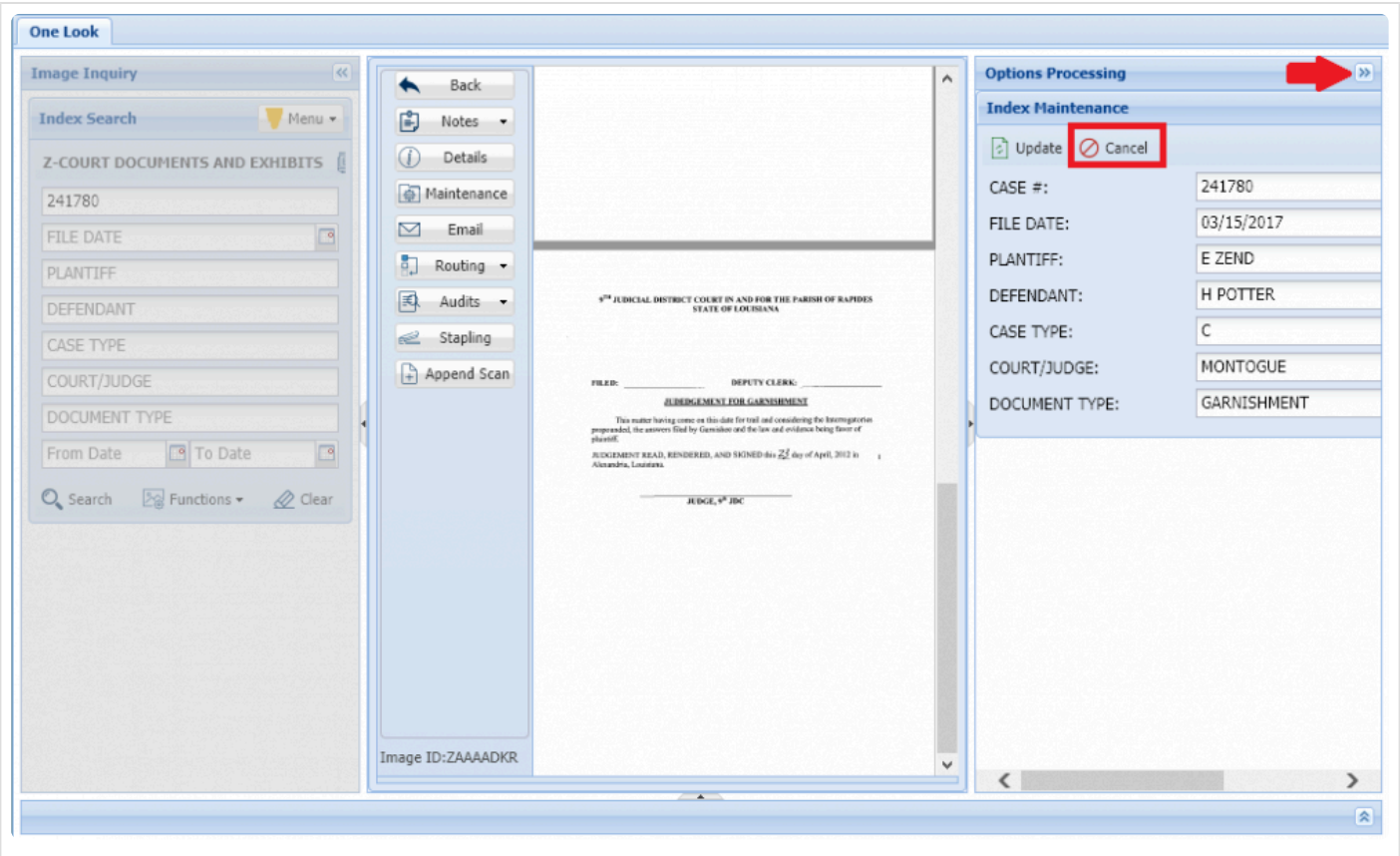
The user will get a prompt in the browser to open the file.

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.

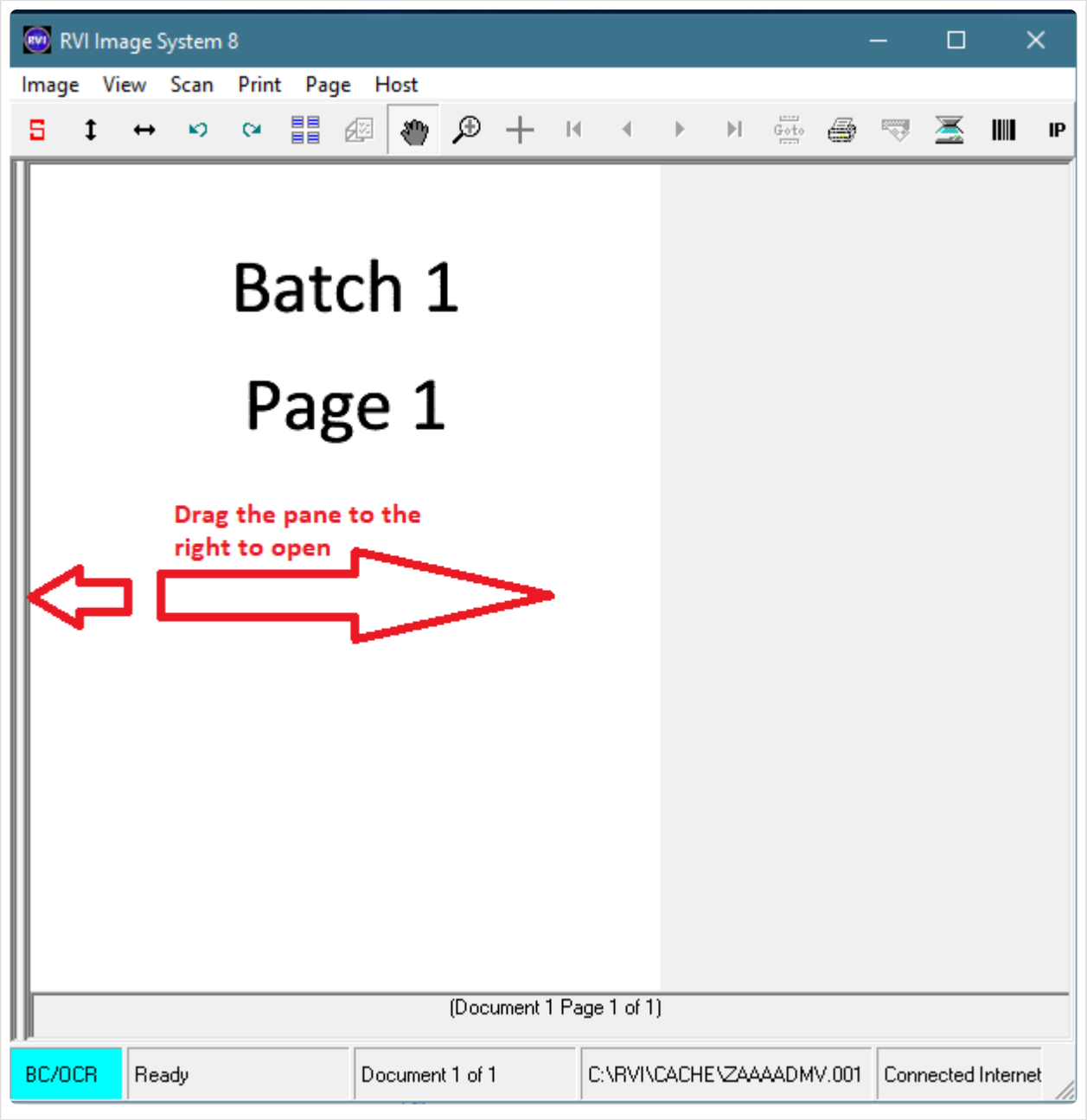


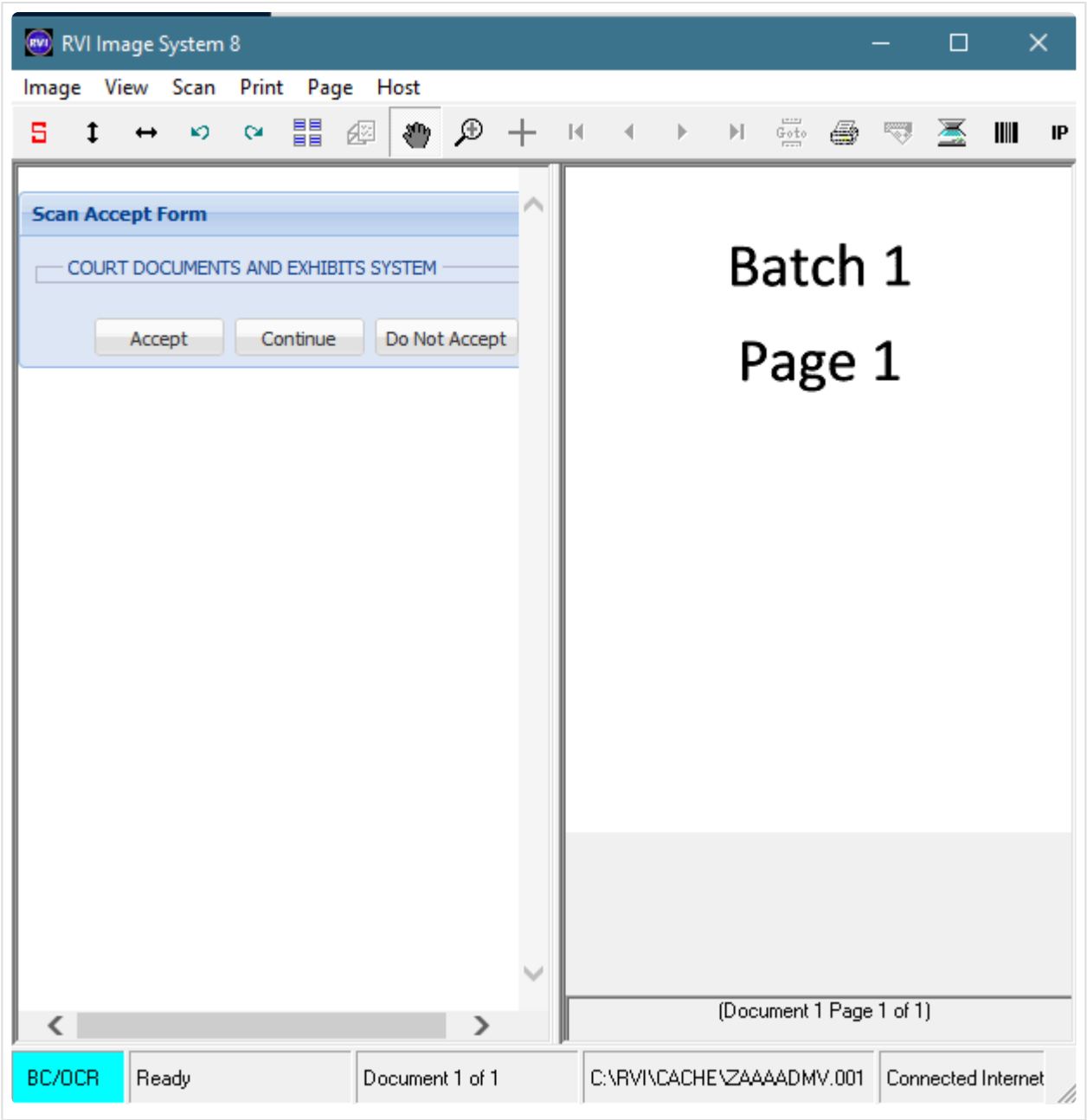
Expand the option processing window if it’s not open already. Cancel out of the maintenance window. Now you will be able utilize the index search window.



12.3. Accept / Reject Screen Not Appearing After Scan

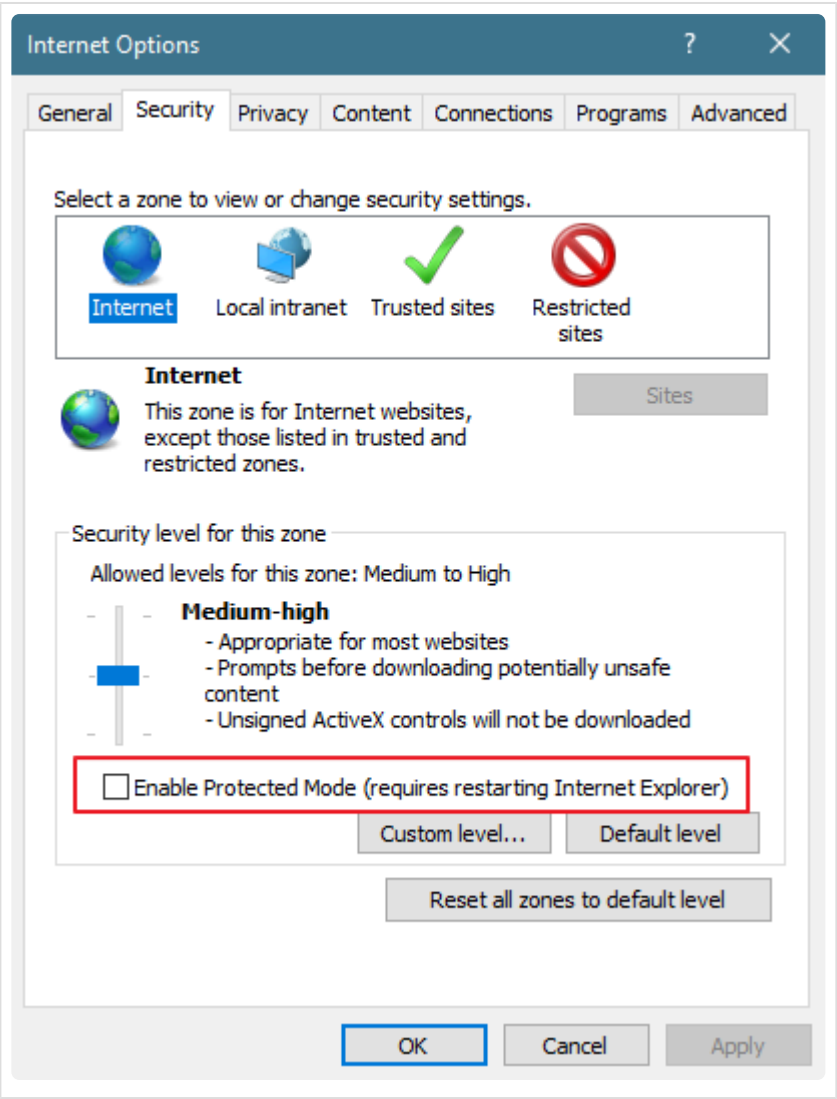
After scanning, if the Accept/Reject window does not automatically display in the RVI PC viewer, verify that the pane is not minimized to the left side of the screen. Place the cursor on the left edge of the RVI PC viewer window and drag the pane open.


RVI Image System 8
Image View Scan Print Page Host
Batch 1
Page 1
Drag the pane to the right to open
(Document 1 Page 1 of 1)
BC/OCR
Ready
Document 1 of 1
C:\RVI\CACHE\ZAAAADMV.001
Connected Internet



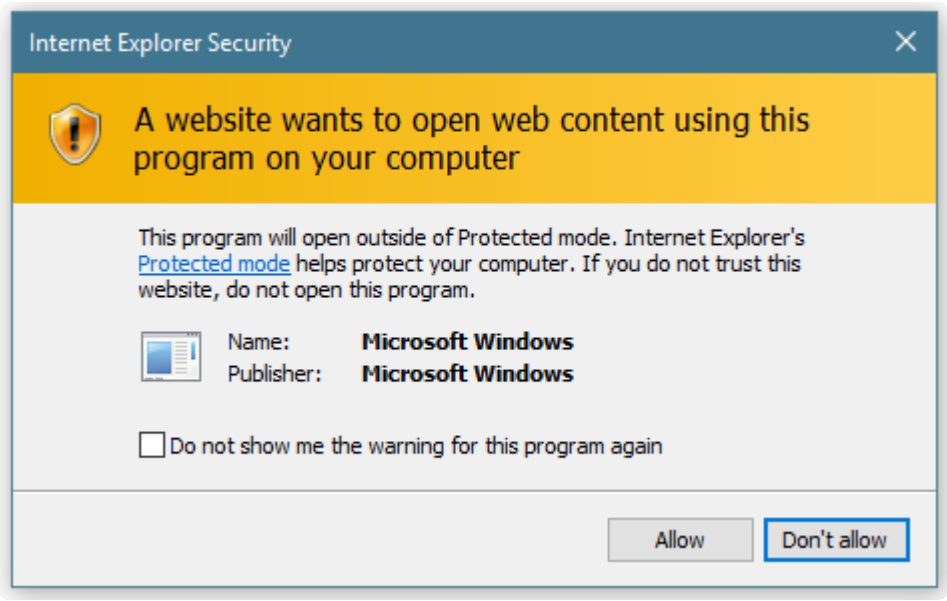
12.4. IE Prompting to Save and Open PDF

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 , select Internet Options, Security tab.



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:



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:

1. From the IBMi server, navigate to:
   /cgibin/cmnss/imageinquiry/app/controller/main.jsd

2. Open main.js. in notepad then search for:
   GoogleDocs.indexOf(fileformat)

3. Locate the next line under GoogleDocs.indexOf(fileformat)
   this.officedocs = "Y";

```
main.js - Notepad
File  Edit  Format  View  Help
            var videoflag = "Y";
        }  else {
            var videoflag = "N";
            if (GoogleDocs.indexOf(fileformat) > -1){
                this.officedocs = "Y";
            }
```

4. 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.

```
WORK WITH DATA IN A FILE                          Mode . . . . :   CHANGE
Format . . . . :   RCREC                          File . . . . :   RVIMGWPF

RCFEXT: DOCX
RCCTYP: application/vnd.openxmlformats-officedocument.wordprocessingml.document

RCFATT: Y
```

7. Set RCFATT: to **Y**

> Alter all office file extensions: doc, docx, xls, xlsx, ema, eml OR 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
Menu
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.

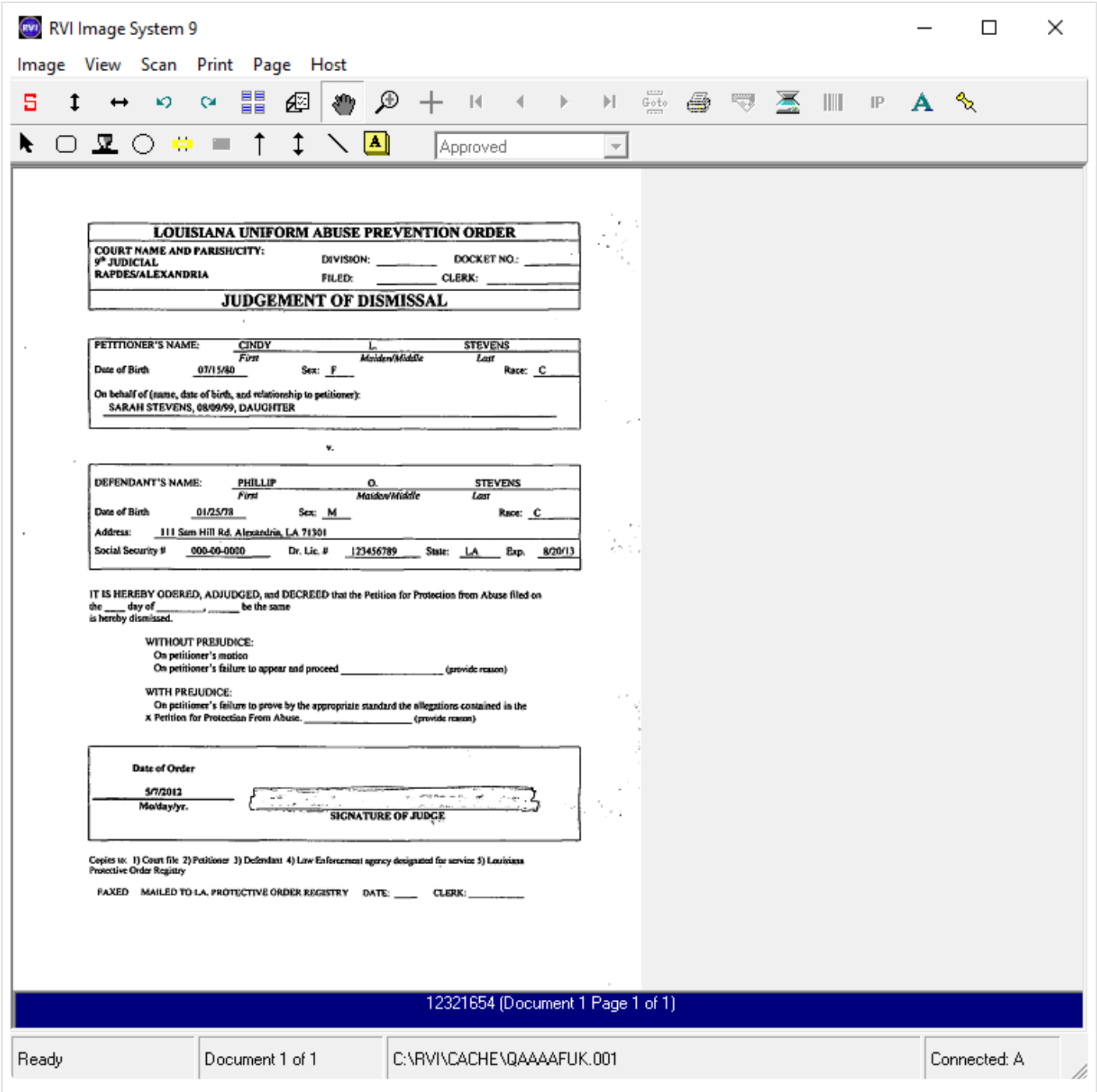
13.1.1. Install the RVI PC Viewer

1. Download the latest RVI PC Viewer from **Real Vision Software**, 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.



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
3. 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
8. 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
                                                                  RVAWCNFFM/SCRN1

        Instance Name...........: RVIWEB
        Port....................: 8085
        Library.................: RVILIB
        Additional Directory 1..:
        Additional Directory 2..:
        Additional Directory 3..:
        Additional Directory 4..:
        Additional Directory 5..:
        Start Server? Y/N.......: Y  Only if creating instance
F5 = Create Instance     F7 = Remove Instance      F9 = Create Secure Instance

Entries will be made for IMAGE and OPTICAL IFS directories and QDLS folders.

Additional Directories are any IMAGE-like directories for which DIRECTORY and
ALIASMATCH blocks are to be created in this instance.  Include no leading or
trailing slashes in the Additional Directory entries.  An entry for the QDLS
folder named IMAGE2 would be entered as QDLS/IMAGE2 (no leading/trailing slash.

F3 =Exit
```

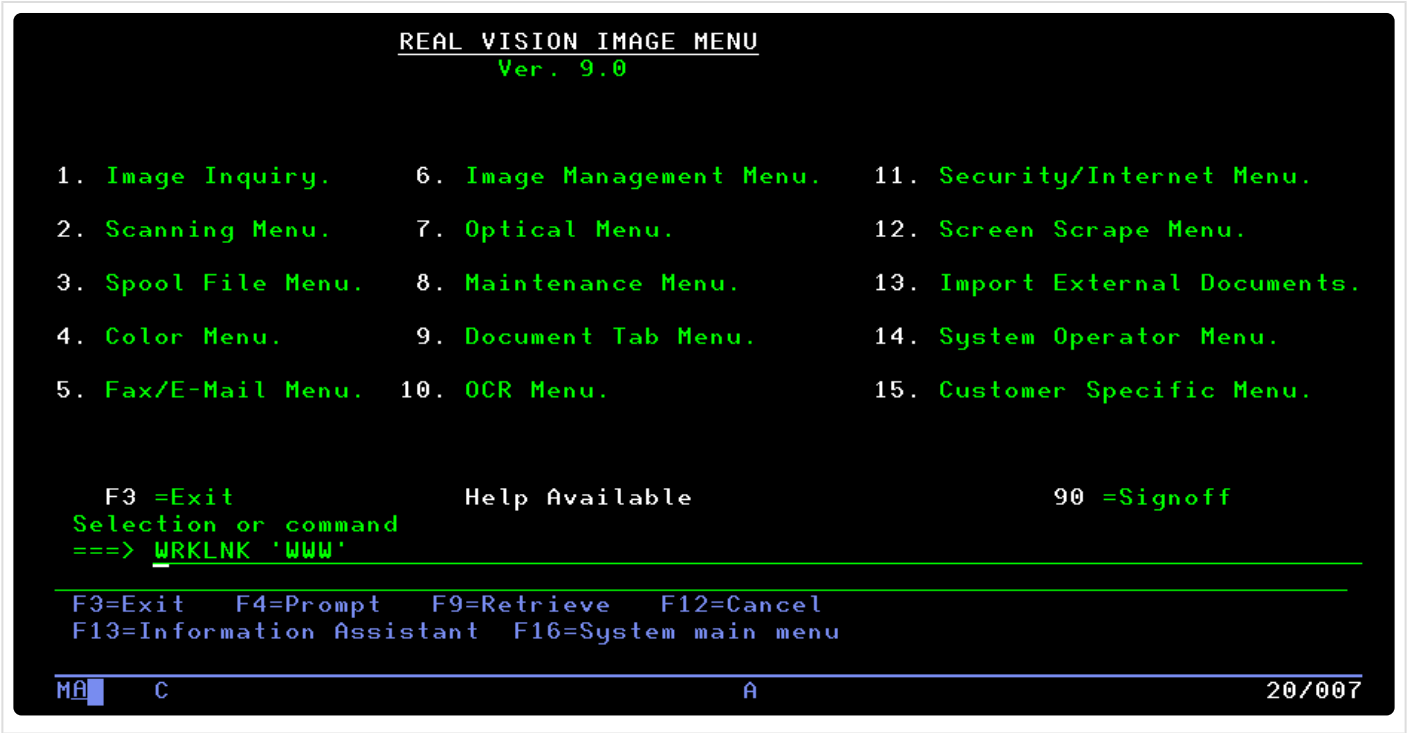
5. Specify an ‘Instance Name’ for your web server or leave the default of RVIWEB.
6. Specify a port number for your web server or leave the default of 8085.
7. Press F5 to create and start the server instance or F9 to create and start a secure instance.

> 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'**



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

```
                              Work with Object Links

Directory  . . . . :   /

Type options, press Enter.
  2=Edit   3=Copy   4=Remove   5=Display   7=Rename   8=Display attributes
  11=Change current directory ...

Opt   Object link            Type     Attribute    Text
5     WWW                    DIR

                                                                      Bottom
Parameters or command
===> ____________________________________________________________________________
F3=Exit   F4=Prompt   F5=Refresh   F9=Retrieve   F12=Cancel   F17=Position to
F22=Display entire field          F23=More options
```

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

```
                              Work with Object Links

Directory  . . . . :   /WWW

Type options, press Enter.
  2=Edit   3=Copy   4=Remove   5=Display   7=Rename   8=Display attributes
  11=Change current directory ...

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...
Parameters or command
===> ____________________________________________________________________________
F3=Exit   F4=Prompt   F5=Refresh   F9=Retrieve   F12=Cancel   F17=Position to
F22=Display entire field          F23=More options
```

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

```
                              Work with Object Links

Directory  . . . . :   /www/RVIWEB

Type options, press Enter.
  2=Edit   3=Copy   4=Remove   5=Display   7=Rename   8=Display attributes
  11=Change current directory ...

Opt   Object link            Type     Attribute    Text
5     conf                   DIR
__    htdocs                 DIR
__    logs                   DIR

                                                                    Bottom
Parameters or command
===>                                                                  _
F3=Exit   F4=Prompt   F5=Refresh   F9=Retrieve   F12=Cancel   F17=Position to
F22=Display entire field          F23=More options
```

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

```
                                Work with Object Links

     Directory  . . . . :   /WWW/RVIWEB/conf

     Type options, press Enter.
       2=Edit    3=Copy    4=Remove    5=Display    7=Rename    8=Display attributes
       11=Change current directory ...

     Opt    Object link              Type      Attribute     Text
     5_     httpd.conf               STMF

                                                                              Bottom
     Parameters or command
     ===> ____________________________________________________________________________
     F3=Exit   F4=Prompt   F5=Refresh   F9=Retrieve   F12=Cancel   F17=Position to
     F22=Display entire field          F23=More options
```

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

```
 Browse : /www/RVIWEB/conf/httpd.conf
 Record : _____1   of      99 by  14          Column :  __1     59 by  79
 Control : _____________________________________________________________________

....+....1....+....2....+....3....+....4....+....5....+....6....+....7....+....
 ***********Beginning of data*************
<Location *>
   <LimitExcept GET HEAD OPTIONS TRACE POST>
      Order deny,allow
      Deny from all
   </LimitExcept>
</Location>
Listen 8085
CGIConvMode %%MIXED/MIXED%%
```

Identify RVI Webserver IP Address

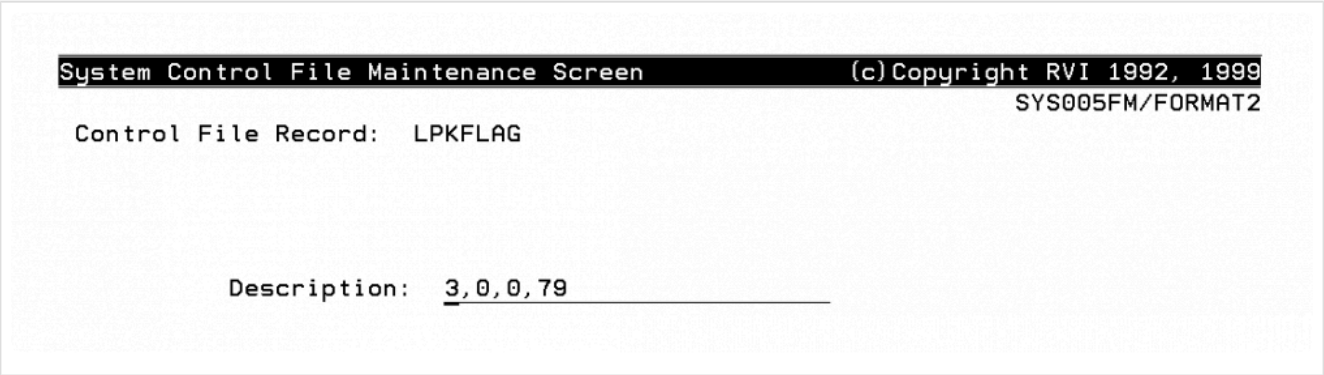
1. From an IBM i command line, type **GO TCPADM**.
2. Select **Option 1** Configure TCP/IP.
3. Select **Option 10** Work with TCP/IP Host Table Entries.
4. Scroll through the list of entries to find the IP address for the host.

13.1.5. Configure IBMi Email Server

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

13.1.6. Setup RVIINET Download

1. The RVIWEB instance on the server must already be setup and running.
2. 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**



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.

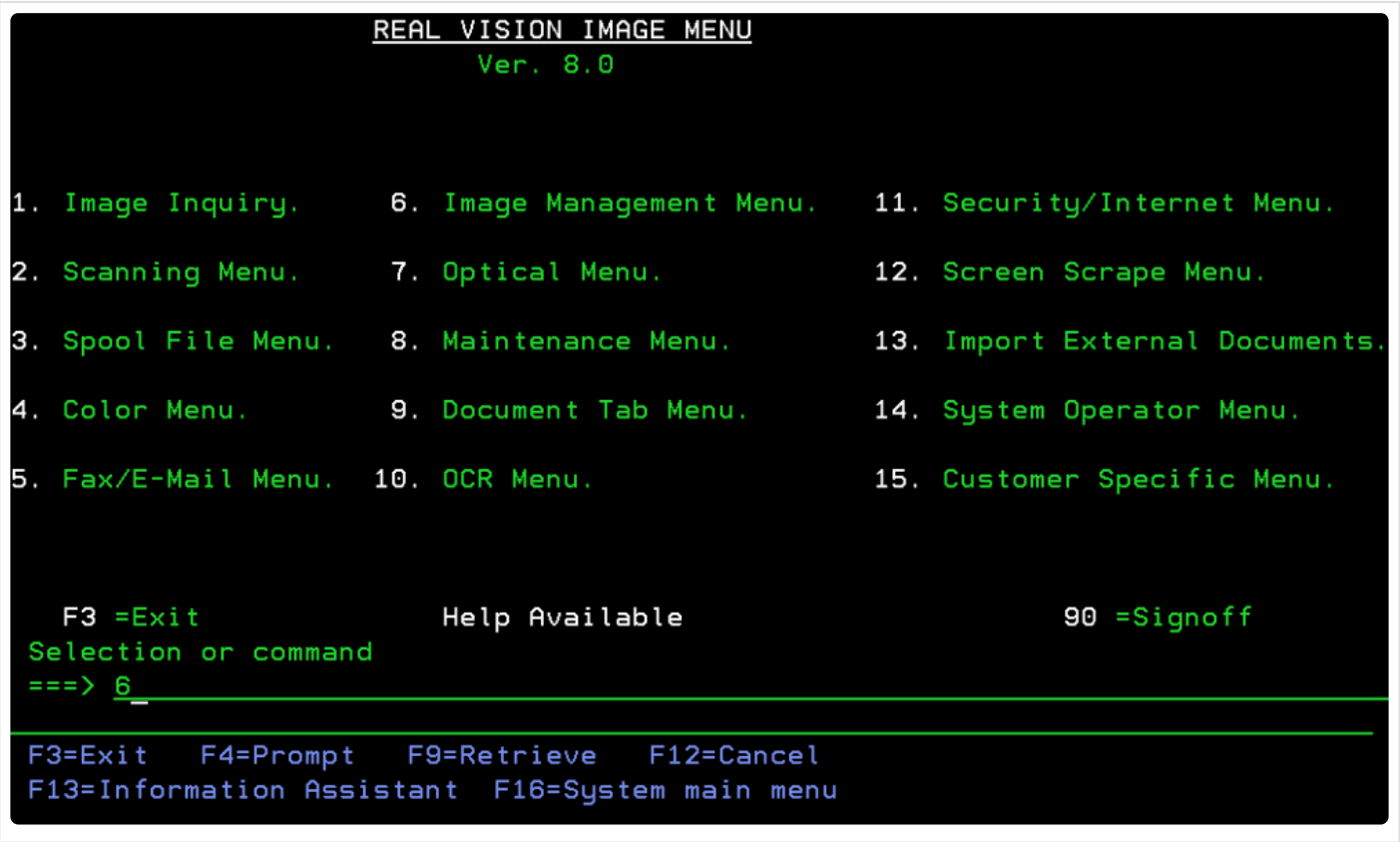
In order to ensure all clients are updated with the latest version from a single source, the updated RVIINET.LPK and RVIINET.CAB files must exist in the CGIBIN directory of the referenced internet server and the LPKFLAG set to the current version. The Host System Manager is responsible for downloading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



3. Select 5: Rubber Stamp Action Codes

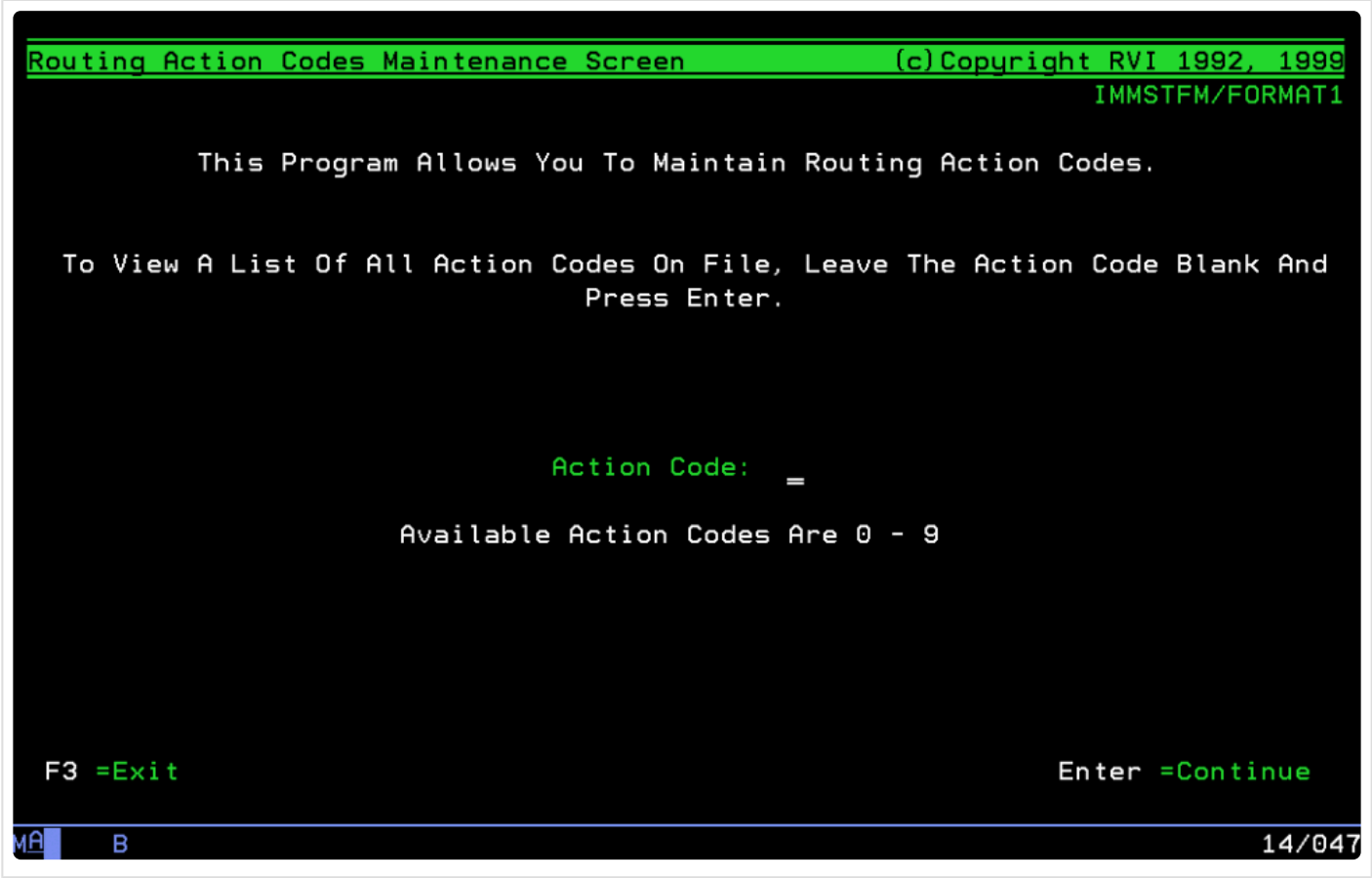
```
                    REAL VISION IMAGE MANAGEMENT MENU



 Image Management Inquiry                 Image Management Reports
 1. Routed By User ID                     11. Images Routed By User ID
 2. Routed By Routing Profile             12. Images Routed By Routing Profile
 3. Notepad By User ID W/Open Notes       13. Routing Profile Members
                                          14. Rubber Stamp Action Codes
 Image Management Maintenance             15. Routing Rules
 4. Image Routing Profiles                16. Routing Approval Rules
 5. Rubber Stamp Action Codes             17. Routing Destinations
 6. Routing Rules                         18. Overdue Notifications
 7. Routing Approval Rules                19. Workbasket Access
 8. Routing Destinations                  Image Management Aging
 9. Overdue Notifications                 20. Send Overdue Notifications
10. Workbasket Access                     21. Start Notifications Polling
                                          22. End Notifications Polling
Selection or Command                                        90 =Signoff
===> 5_

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

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



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

```
Routing Action Codes Maintenance Screen          (c)Copyright RVI 1992, 1999
                                                              IMMSTFM/FORMAT2

          Action Code:  5

          Description:  CANCELLED_____

          Additional Information Required?:   _   (Y/N)

                                          Delete Code:  _  (D=Delete)

 F3 =Exit                F12 =Cancel                     Enter =Continue

MA    B                                                              09/036
```

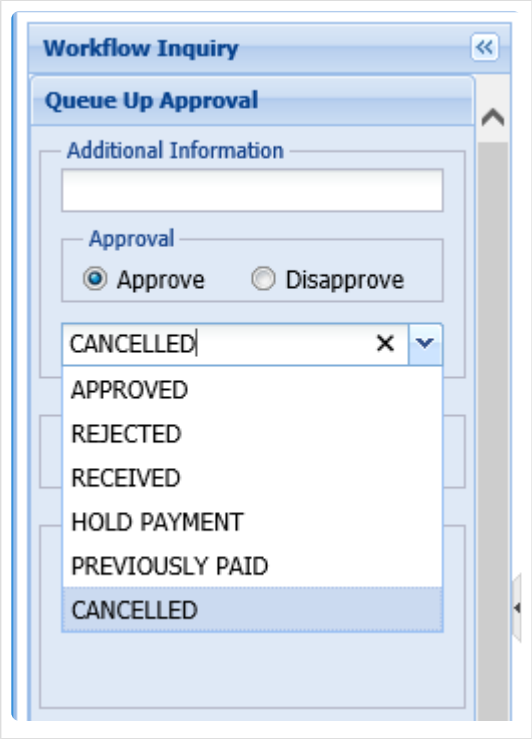
The new action code will be added to the IBM i table.

```
Routing Action Codes Selection Screen              (c)Copyright RVI 1992, 1999
                                                                IMMSTFM/CATLSTCT
 Type Option, Press Enter
  X=Select  D=Delete
                                          Addl Information
 Opt  Action Code   Description            Required? Y/N
  _        0         APPROVED                    Y
  _        1         REJECTED                    N
  _        2         RECEIVED                    Y
  _        3         HOLD PAYMENT                Y
  _        4         PREVIOUSLY PAID             N
  _        5         CANCELLED                   N

 Page Up =Previous Page                                Page Down =Next Page
 F3 =Exit                      F12 =Cancel                 Enter =Continue

MA    B                                                                08/004
```

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


Workflow Inquiry
Queue Up Approval
Additional Information
Approval
Approve
Disapprove
CANCELLED
APPROVED
REJECTED
RECEIVED
HOLD PAYMENT
PREVIOUSLY PAID
CANCELLED

13.1.8. CALL MVC013 or MVC013D

MVC013: Scan to PC

The parameters are described below.

Length	Type	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 92. If you are not using additional indexes then do not pass this parameter.

If Index 1 of the 211 byte parameter contains:	**Function:**
?	Will set Index 1 of the resulting scan to be **SNNNNNNN**, where **S** is the Image System ID Code and **NNNNNNN** 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	Type	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 92. If you are not using additional indexes then do not pass this parameter.

If Index 1 of the 211 byte parameter contains:	**Function:**
?	Will set Index 1 of the resulting scan to be **SNNNNNNN**, where **S** is the Image System ID Code and **NNNNNNN** 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:

     1. User tasks
     2. Office tasks
     3. General system tasks
     4. Files, libraries, and folders
     5. Programming
     6. Communications
     7. Define or change the system
     8. Problem handling
     9. Display a menu
    10. Information Assistant options
    11. iSeries Access tasks

    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 Access Users

Type choices, press Enter.

  User profile . . . . . . . .   _________        Name
  User identifier:
    User ID  . . . . . . . . .   _________        Character value
    Address  . . . . . . . . .   BLANK    __      Character value
  User description . . . . . .   ______________________________________
____
  Add to system directory  . .   *yes             *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 RVI 90 IBMi User Manual for details.

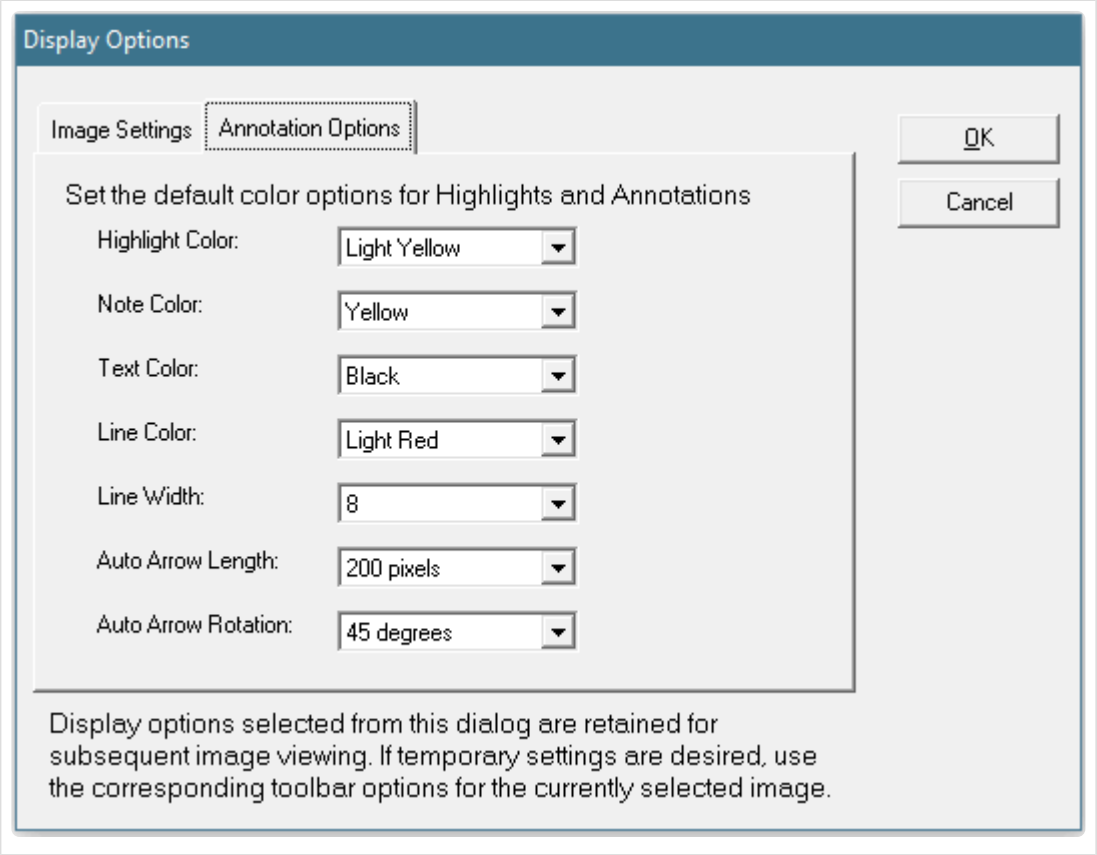
The following options are available in One Look Image Inquiry and WorkBasket: **(By default users have access to all options.)**

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

D	Delete from Routing Queue
C	Call Back Reminders
E	Email Image
F	Fax Image
H	Workbasket Approval History
K	Approve/Disapprove
M	Workbasket Move
N	Add Notes
R	Routing Profile
S	Scan Documents
U	Route User
X	Image Information
Z	Custom Options
d	Allow Deletion in Index Maint
s	Staple Documents
u	Upload Documents
w	Move to Sub Workbasket
x	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.



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 RVI 90 IBMi User Manual 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 RVI 90 IBMi User Manual 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

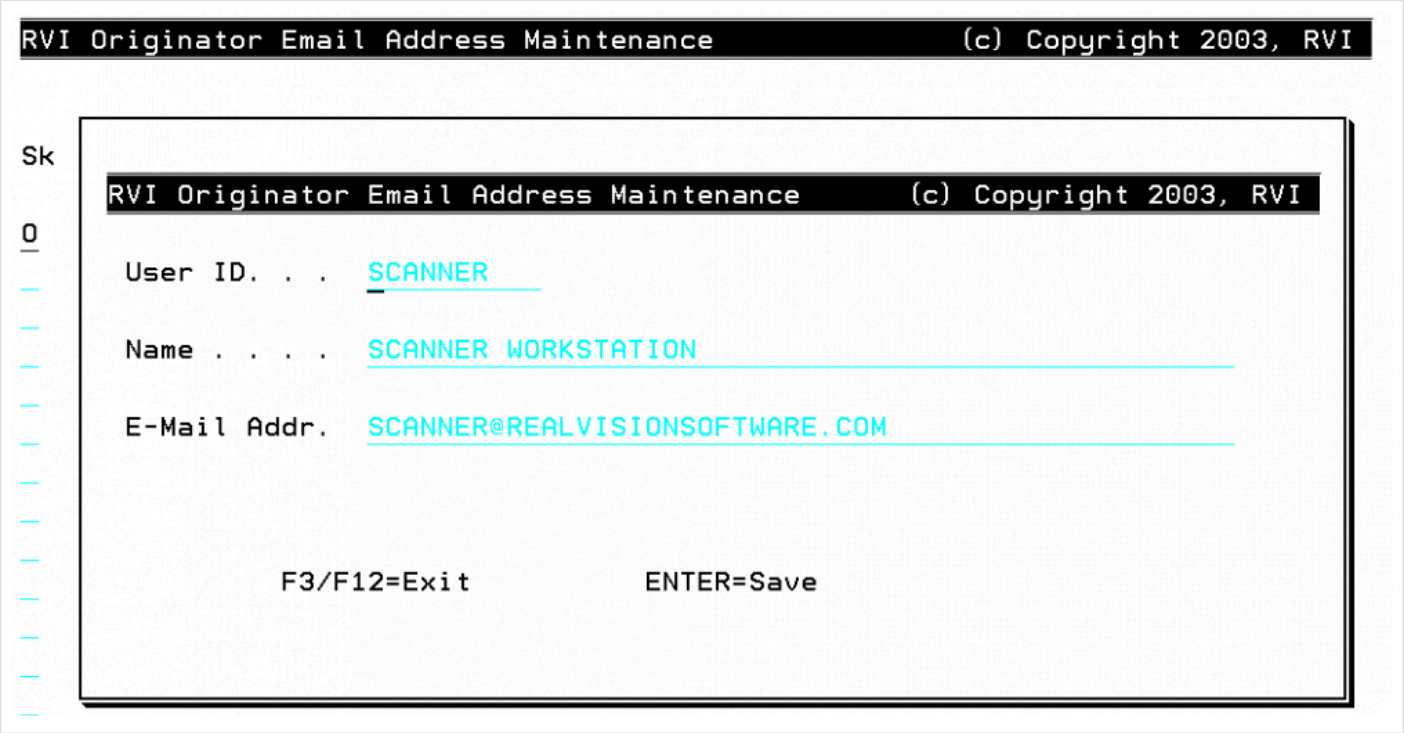
```
RVI Originator Email Address Maintenance          (c) Copyright 2003, RVI

Skip To User ID:

O User ID    User Name            Email Address

                                                                   More...
Opt: 1=Select      2=Modify      4=Delete
F3=Exit                          F6=Add Record                  F12=Cancel
MA    D
```

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



13.1.15. Setup RVI Socket Server (DataQue)

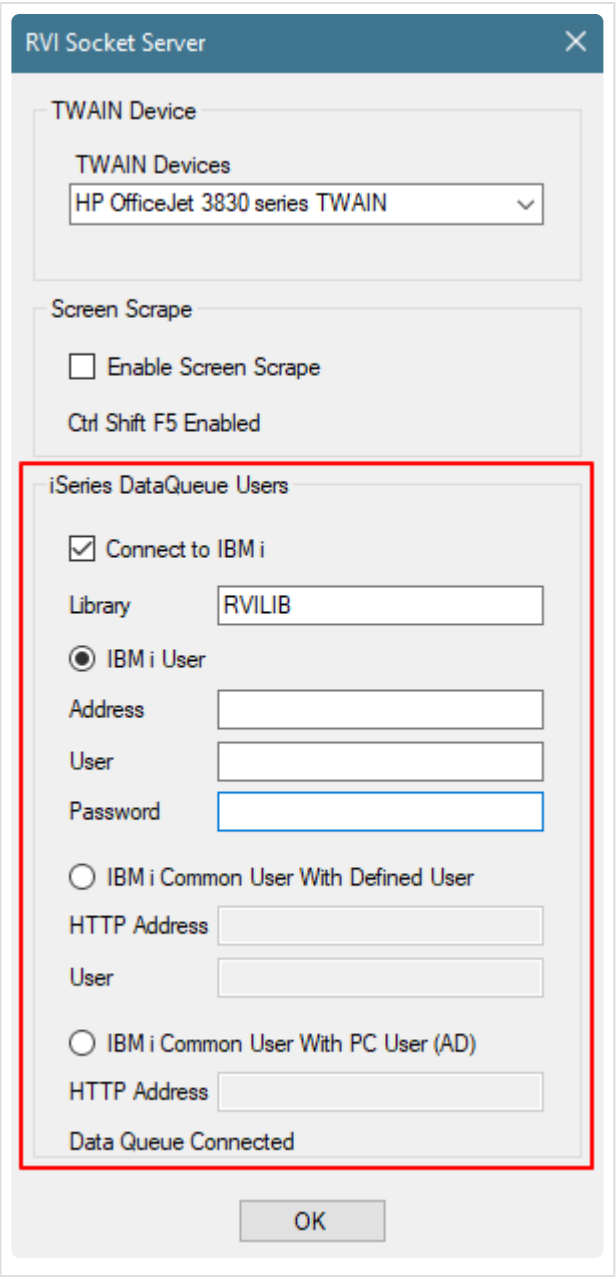
For DataQue configuration options E and F, users must provide valid login credentials via the RVI Socket Server interace.

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 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



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 RVI support for setup.*)

- HTTP Address: HTTP address pointing to the RVI web server instance.

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

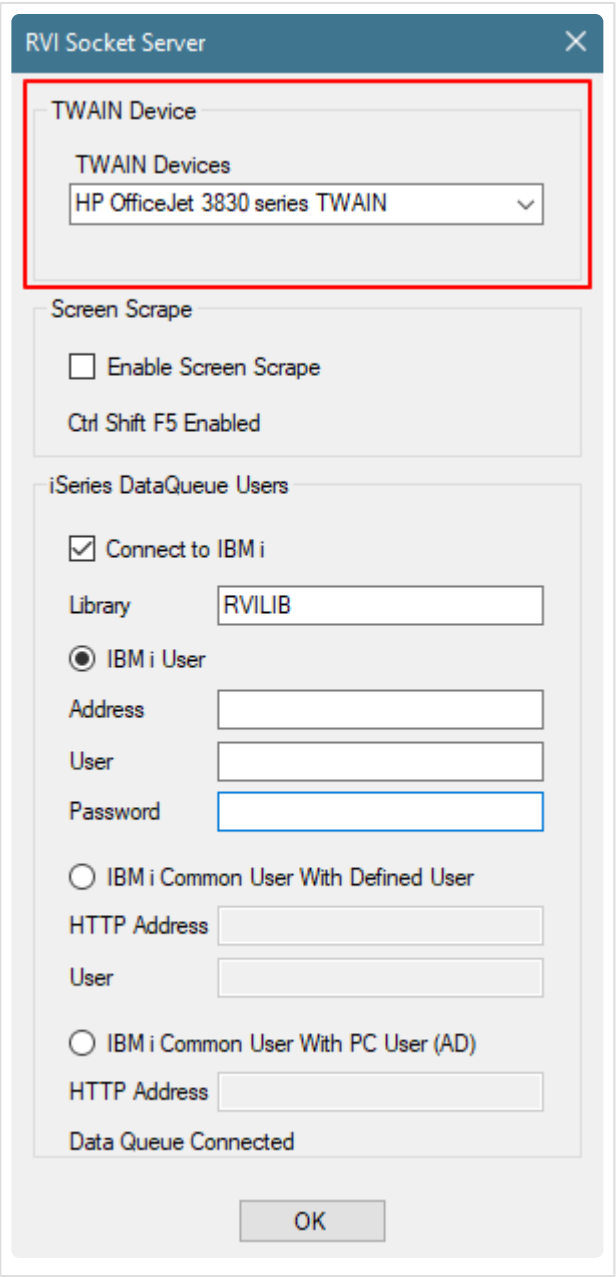
- HTTP Address: HTTP address pointing to the RVI web server instance.

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 RVI PC Viewer. 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**



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 RVIOneLook.exe here.

14. HELP

14.1. Contact Real Vision Software

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