

# ONE LOOK – IBMi / Cloud

### Real Vision Software, Inc.

Enterprise Content Management (ECM) Software

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### **1. OVERVIEW**

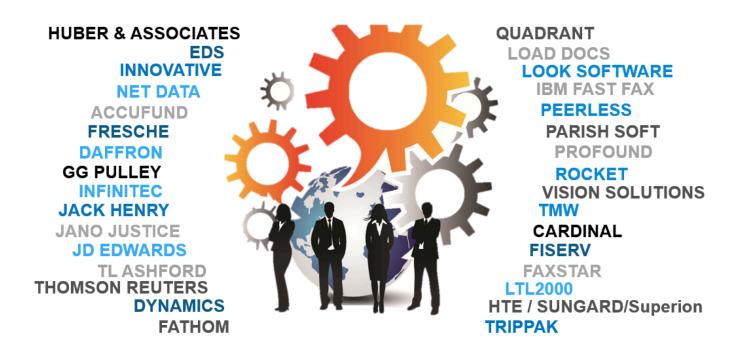
This manual was developed for existing and potential Real Vision Software (RVI) customers interested in learning about the functionality and features of the One Look interface. This manual is specific to One Look – IBM i / Cloud installations.

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*), Google Chrome (*Chrome 60 or higher*), or Microsoft Edge are preferred.

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

### 2. INTERFACES

Here are some of the software companies that we currently work with. Don't see yours in the list? Contact <u>Real Vision Software</u> today to find out if we can work with your software!



### **3. INSTALLATION**

#### Requirements:

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

#### Installation:

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

#### Setup and Testing:

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

Secure instance: Go to *https://ipaddress:port/internet/cmnss/imageinquiry/app/index.html* to access the signon screen.

## **4. CONFIGURATION OPTIONS**

One Look **DISPLAY** configurations:

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

One Look KOFAX BARCODE SCANNING/FOLDER IMPORT/DRAG DROP/SEND TO RVI/PRINT TO RVI/ANNOTATION/OCR configuration:

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

# 4.1. PDF Display in the Browser

The PDF display is the default display for One Look. It does not require any special setup. The system will automatically convert images to PDF. Files that are not images will prompt for download or they will display using browser add-ins for your particular browser. (**RVI recommends Google Chrome.**)

See <u>No Preview Available</u> for instructions on how to setup Google Chrome to view Office documents.

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One Look browser.		0	Attach Document	4. For all necessary orders and decrees.
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### 4.2. TIF Display in RVI PC Viewer

This configuration is necessary when using Image Markup.

#### **Requirements:**

- The user must have a 5250 Configuration of E or E
- The <u>RVI PC Viewer</u> must be installed and show **Connected: IBM Data Queues** in the bottom right corner.

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• One Look must show Host-Socket Connected in the top left corner.

Image Inquiry (Host-Socket Connected)

If the viewer is not connecting, verify Host/EHLLAPI is set to IBM DATA QUEUES and the credentials are valid.

~

General	You may change your EHLLAPI support type by choosing one of the
<ul> <li>Screen Scrape</li> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	following: NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60
	Library       RVILIB         DQ Type       IBM i User         IBM i Address       12.26.223.217         IBM i User       john         IBM i Password       *******
	OK Cancel

To view as TIF, click the **Viewer/PDF toggle button** or **Session Settings/RVI to Viewer** in the top righthand corner of One Look. By using the toggle option, users can switch back and forth between viewing as TIF or PDF as needed. This is handy for those users that prefer to view as PDF, but also need to use image markup. During the image markup, they can click the toggle button to view the image as TIF then toggle back to PDF for subsequent displays.

#### **VIEWER/PDF TOGGLE BUTTON**

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	N	241780	20200317	JOHNATHAN C	TARA ST. ROM	BIV	JOHNSON	MISC
		241780	20110612	JONATHAN CH	TARA ST. BOM	DIV	JOHNSON	ORDER
	N R	241780	06132011	JONATHAN CH	TAPA ST. ROM	DIV	JOHNSON	PETITION
	N R	241780	20110617	JOHNATHAN C	TARA ST. ROM	DIV	JOHNSON	PETITION
		241780	20110615	JOHNATHAN C	TARA ST. ROM	DIV	JOHNSON	РНОТО
		241780	06012011	JONATHAN CH	TARA ST. ROM	DIV	JOHNSON	SUPPLEMENTAL
		241790	032520	JONATHAN CH	TARA ST. ROM	DIV	P WALTER	APP
	L	241790	032520	JONATHAN CH	TARA ST. ROM	DIV	P WALTER	PETITION
	L	241790	032520	JONATHAN CH	TARA ST. ROM	DIV	P WALTER	PETITION

#### **RVI TO VIEWER OPTION**

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		Remove Numeric Formatting	On/Off				
		Combine PDF	On/Off				
			On/Off				ИС
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	L	Editable Display Fields	🔲 On/Off				ИС
	L	Items Per Page	500		~		NC
(Vi	iewer)	'Temporary Grid' and 'Show in Window' initial window size:	Normal		*		teserved.
		🚫 Clear Cookies				Save Settings	

Example of a document displayed as TIF in the RVI PC Viewer. Notice the annotation toolbar at the top of the screen is active. The user can now add image markup to this document.

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# 4.3. OneLook – 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  $\boldsymbol{X}$  next to the record to edit.)

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

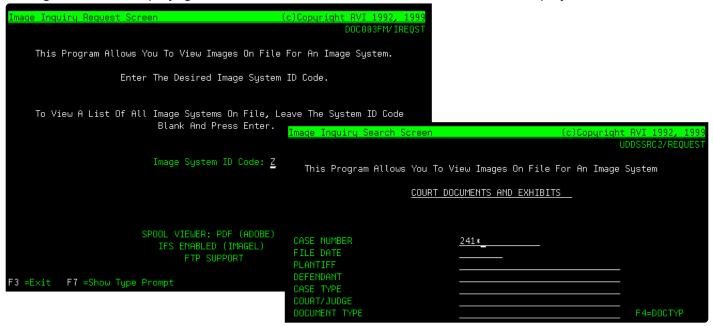
Maintain PC Workstation Configuration Screen (c)Copyright RVI 1992, 1999
X=Select A Mapping Type CRTRVIFM/CNT100D5
_ D,Y=Data Queue _ S,N=Folders _ 1=FTP-TCPADDX Value
F=FTP U=UNC 2=UNC-SYSTEMX Value
H=HTTPT=TCP-UNC3=HTTP-HTTPX Value
X=Select An Image Viewer (For further info, tab to entry field, then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

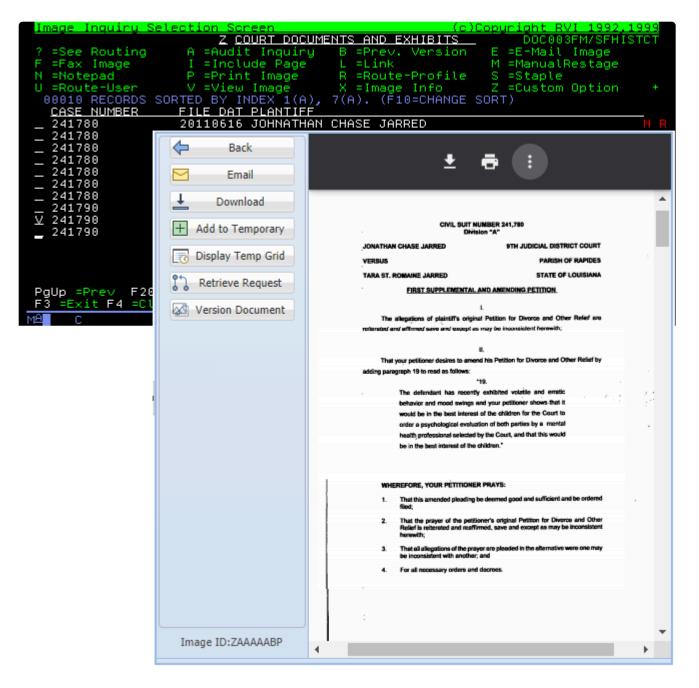
# 4.3.1. O = Index List in Green Screen, View in One Look, Using Polling

### **Type O Configuration**

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

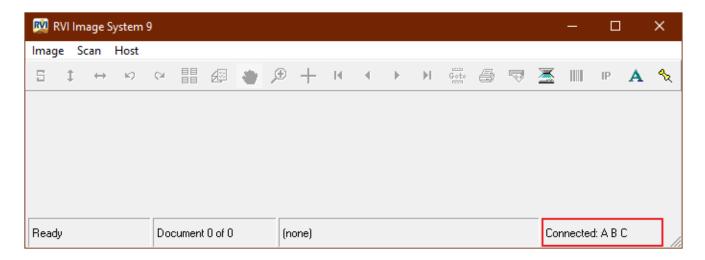
Uses green screen inquiry, green screen index subfile list, One Look document display.





#### Requirements:

- 1. Active 5250 session
- 2. RVI PC Viewer shows Connected: (Only needed if scanning.)



General Screen Scrape	You may change your EHLLAPI support type by choosing one of t following:	the
<ul> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60	•
	✓ Multiple EHLLAPI Program Support	
	☐ Get Credentials From Server	

3. One Look browser shows Host Connected.

 Image Inquiry (Host Connected)

 If One Look does not show Host Connected, click here

#### 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

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

### **Type P Configuration**

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

Uses green screen inquiry, One Look index subfile list, One Look document display.

Image Inquiry Request Screen	(c)Copyright RVI 1992, 1999 DOC003FM/IREQST	
This Program Allows You To View Images On File	e For An Image System.	
Enter The Desired Image System	m ID Code.	
To View A List Of All Image Systems On File, I Blank And Press Enter.		c)Copyright RVI 1992, 1999 UDDSSRC2/REQUEST
Image System ID Code: <u>Z</u>	This Program Allows You To	o View Images On File For An Image System
	COURT	DOCUMENTS AND EXHIBITS
SPOOL VIEWER: PDF (ADOBE) IFS ENABLED (IMAGEL) FTP SUPPORT F3 =Exit F7 =Show Type Prompt	CASE NUMBER FILE DATE PLANTIFF DEFENDANT CASE TYPE COURT/JUDGE DOCUMENT TYPE	<u>241*</u>  

Image Inquiry (Host-Socket & Host Connected)	z -	COURT	DOCUMENTS AND	EXHIBITS						@ ? ¢				
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Z - COURT DOCUMENTS AND EXHIBITS 📑 Change System			CASE NUMBER	FILE DATE	PLANTI	FF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TY				
CASE NUMBER: 241*		Flags				$\diamond$	Back	Instr	uctions:	•				
FILE DATE		NR	241780	20110616	JOHN4	F	Notes -							
PLANTIFF		N	241780 241780	20200317 20110612	JOHN/ JONAT		Details		This Ca	se Mana				
DEFENDANT		N R	241780	06132011	JONAT	1018	Maintenance	origin						
CASE TYPE		N R	241780	20110617	JOHN4		Email	U	original is to filed with t counsel at least seven (					
COURT/JUDGE			241780	20110615	JOHN/		Fax							
DOCUMENT TYPE			241780 241790	06012011 032520	JONAT JONAT	귦	Routing -	comp	complete those portio					
From Date 🖸 To Date		L	241790	032520	JONAT	Ē A	Audit Information	D	. 1					
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						Imag	ge ID:ZAAAAABE	•						

#### Requirements:

- 1. Active 5250 session
- 2. RVI PC Viewer shows Connected: (Only needed if scanning.)

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Ready				Do	cument	t O of O		(n	one)		 					Co	nnecte	d A B	c	
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If the viewer is not connecting, verify Host/EHLLAPI is set to IBM PERSONAL COMM.

🚰 General 🖶 Screen Scrape	You may change your EHLLAPI support type by choosing one of the following:	
<ul> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAP</li> </ul>	NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60	•
	<ul> <li>Multiple EHLLAPI Program Support</li> <li>Get Credentials From Server</li> </ul>	

3. One Look browser shows **Host Connected**.

st Connected)	
---------------	--

\* If One Look does not show Host Connected, click here

#### Function and Output:

#### Viewing:

- 5250 emulation Image Inquiry
- One Look index list of search results (*If there is only 1 match, the image will automatically display in OneLook.*)
- 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

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

### Type E Configuration

One Look IBMi Host Socket must be running.Confirm the PC Socket 🖤 is NOT running in
the pc system tray. To end the PC Socket, right-click the icon in the system tray, select
Exit. If the PC Socket is set to start automatically in Windows, go to Microsoft Support for
instructions on how to disable it.

Uses green screen inquiry, One Look index subfile list, One Look document display.

Image Inquiry Request Screen	(c)Copyright RVI 1992, 1 DOC003FM/IRE	
This Program Allows You To View Images On File	For An Image System.	
Enter The Desired Image System	ID Code.	
To View A List Of All Image Systems On File, L Blank And Press Enter.	eave The System ID Code <mark>Image Inguiry Search Sc</mark>	creen (c)Copyright RVI 1992, 1999
Image System ID Code: <u>Z</u>		UDDSSRC2/REQUEST You To View Images On File For An Image System
		COURT DOCUMENTS AND EXHIBITS
SPOOL VIEWER: PDF (ADOBE) IFS ENABLED (IMAGEL) FTP SUPPORT F3 =Exit F7 =Show Type Prompt	CASE NUMBER FILE DATE PLANTIFF DEFENDANT CASE TYPE	<u>241*</u>
	COURT/JUDGE DOCUMENT TYPE	F 4=DOCTYP

Image Inquiry (Host-Socket Connected)	Z - COL	JRT D	OCUMENTS AND	EXHIBITS					; ₽		
Index Search V Menu -		Pa	ge 1 of 1		Displaying 1 -	11 of 11	🔽 Displa	y Checked 🔲 D	isplay Options <del>-</del>		
Z - COURT DOCUMENTS AND EXHIBITS			CASE NUMB	FILE DATE	PLAINTIFF	DEFENDANT	CASE TYPE	COURT/JUD	DOCUMENT		
CASE NUMBER: 241*		Flags									
FILE DATE		R S	241780	05/13/2021	J JARRED	T JARRED	C	MONTOGUE	JUNK		
PLAINTIFF			de Bac								
DEFENDANT		L	Distance Notes	s •	≡	1 /	4   -	+   🕄	� ≛	•	
CASE TYPE		N	🔲 Deta	ils		11.1	x				
COURT/JUDGE		NR	🔊 Mainten	ance							
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Show Deleted Records			Routin	ig 🔻		JONATHAN C	HASE JARRED	9TH JUDICIAL DISTRIC PARISH OF			
🔾 Search 🛛 🙀 Functions 🗸 🔗 Clear			Audit Info	rmation		TARA ST. RO	HAINE JARRED	STATE OF LO	DUISIANA		
			Append	Scan		The all	l agations of plaintiffs original	Petition for Divorce and Other	Relief aro		
			+ Add Red	action		reitsrated and	affirmed save and except as r	nay be inconsistent herowith;			
he index subfile list will populat			↓ Downl	oad			ur petitioner desires to amend sph 19 to read as follows:	his Petition for Divorce and Othe	r Relief by		
ne Look then the user can selec			+ Add to Ten	nporary			"I The defendant has recently	R, extribited volatile and errotic			
hich record(s) to view in One Lo	JOK.		Display Ter	mp Grid	1.1		would be in the best interest o	d your petitioner shows that it d the children for the Court to on of both parties by a mental			
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							led; 3	er's original Publics for Divorce ed, save and except as may be in			
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						1 '	be inconsistent with another; a for all necessary orders and d	nd			
		l	International Destate		(* -						
			Image ID:ZAA	AAAAA2		5					

#### Requirements:

- 1. Active 5250 session.
- 2. IBMi Host Socket job <u>RVISOCKET</u> running on the IBMi.
- 3. The user id and password used to login to One Look MUST match the user id and password specified in the RVI PC Viewer **Host/EHLLAPI/IBM DATA QUEUES**. (*Only needed if scanning.*)

**NOTE:** If you have multiple users logging into a single scan station, RVI recommends creating a common user. This option allows you to setup a common user to be specified within the RVI.EXE while allowing for multiple user logins in One Look. Refer to the section labeled <u>Common User Swap</u> for more details.

4. RVI PC Viewer shows **IBM DATA QUEUES** in the bottom right hand corner. (*Only needed if scanning.*)

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Image	e S	can	Host														
5	¢	$\leftrightarrow$	K)	Çil		<u> </u>	۲	Æ	+	M	$\left  \cdot \right $	M	Goto	6	7	<u>×</u>	
Ready				Doc	cument	0 of 0		(n	one)		 	C	onnec	ted: IB	M DA'	TA QUE	EUES

- 5. RVI PC Viewer must be set to PC Control Scanning. (Only needed if scanning.)
- Click Image/Preferences/Scanner Support
- Uncheck Use IBM Host System Control

Preferences	
General 🖶 Screen Scrape 🛃 Index Options	Default Scanner Fujitsu fi-7160 with SVRS with AIPE 💌 Barcode IP
E-Mail External Viewers Disk Caching	Default Import Engine None Barcode IP
Signature Pad Scanner Support Matto Import Support	☐ Load TWAIN Scanners
<ul> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	□ IBM Host System Control □ Send images to IBM Host System while scanning (Applies to Scan Direct from IBM Host System Only)

If the viewer is not connecting, verify **Host/EHLLAPI** is set to IBM DATA QUEUES and the credentials are valid.

Preferences	
<ul> <li>Generation</li> <li>Screen Scrape</li> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	You may change your EHLLAPI support type by choosing one of the following: NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60
	Library RVILIB DQ Type IBM i User IBM i Address 12.26.223.217 IBM i User john IBM i Password ******

6. One Look browser shows Host-Socket Connected.

Image Inquiry (Host-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

V

- 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.*

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

### Type F Configuration

One Look <u>IBMi Host Socket</u> must be running.Confirm the PC Socket is NOT running in the pc system tray. To end the PC Socket, right-click the icon in the system tray, select **Exit**. If the PC Socket is set to start automatically in Windows, go to <u>Microsoft Support</u> for instructions on how to disable it.

Uses green screen inquiry, One Look index subfile list, One Look document display.

Imaqe Inquiry Request Screen	(c)Copyright RVI 1992, 1999 DOC003FM/IREQST	
This Program Allows You To View Images On File	e For An Image System.	
Enter The Desired Image System	m ID Code.	
To View A List Of All Image Systems On File, L Blank And Press Enter.	-	(c)Copyright RVI 1992, 1999 UDDSSRC2/REQUEST
Image System ID Code: <u>Z</u>	This Program Allows You To '	View Images On File For An Image System
	<u>COURT DI</u>	OCUMENTS AND EXHIBITS
SPOOL VIEWER: PDF (ADOBE) IFS ENABLED (IMAGEL) FTP SUPPORT F3 =Exit F7 =Show Type Prompt	CASE NUMBER FILE DATE PLANTIFF DEFENDANT CASE TYPE COURT/JUDGE DOCUMENT TYPE	<u>241*</u>

Image Inquiry (Host-Socket Connected)	Z - COL	URT D	OCUMENTS AND	EXHIBITS					; ₽		
Index Search V Menu -		Pa	ge 1 of 1		Displaying 1 -	11 of 11	🔽 Displa	ay Checked 🔲 D	isplay Options <del>-</del>		
Z - COURT DOCUMENTS AND EXHIBITS			CASE NUMB	FILE DATE	PLAINTIFF	DEFENDANT	CASE TYPE	COURT/JUD	DOCUMENT		
CASE NUMBER: 241*		Flags									
FILE DATE		RS	241780	05/13/2021	J JARRED	T JARRED	C	MONTOGUE	JUNK		
PLAINTIFF		L	de Bac								
DEFENDANT		L	Dia Note	s •	≡	1 /	4   -	+   🕄	� ≛	<b>e</b> :	
CASE TYPE		N	🔲 Deta	ils		1.1.1.1	x				
COURT/JUDGE		NR NR	🔊 Mainten	ance							
DOCUMENT TYPE			Ema	il						14 - C	
From Date 🖪 To Date 🖪		N R	🚈 Fax				CIVIL SUIT NUI Divisio	in "A"			
Show Deleted Records			Routin	ig 🔻		JONATHAN C	HASE JARRED	9TH JUDICIAL DISTRIC PARISH OF			
🔾 Search 🛛 🙀 Functions 🗸 🔗 Clear			Audit Info	rmation		TARA ST. RO	HAINE JARRED	STATE OF LO	DUISIANA		
			Append	Scan		The all	l agations of plaintiffs original	Petition for Divorce and Other	Relief aro		
			+ Add Red	action		reitsrated and	affirmed save and except as r	nay be inconsistent herowith;			
he index subfile list will populat			<u>↓</u> Downl	oad			ur petitioner desires to amend sph 19 to read as follows:	his Petition for Divorce and Othe	r Relief by		
ne Look then the user can selec			+ Add to Ter	nporary			"I The defendant has recently	9. extribited volatile and errotic			
hich record(s) to view in One Lo	JOK.		Display Te	mp Grid	1.1		would be in the best interest o	d your petitioner shows that it of the children for the Court to on of both parties by a mental			
			Attach Do			,		the Court, and that this would			
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			yp+ orgin boo				EFORE, YOUR PETITIONER	PRAYS: deemed good and sufficient and	be ordered		
							led; 3	ver's original Publics for Divorce ved, save and except as may be in			
							serewith;	ed, save and except as may be in a sep pleaded in the alternative we			
						1 '	e inconsistent with another; a for all necessary orders and d	ind			
		l	Interna ID-744		e.						
			Image ID:ZAA	AAAAA2		5					

#### Requirements:

- 1. Active 5250 session.
- 2. IBMi Host socket job RVISOCKET running on the IBMi.
- 3. The user id and password used to login to One Look MUST match the user id and password specified in the RVI PC Viewer **Host/EHLLAPI/IBM DATA QUEUES**. (*Only needed if scanning.*)

**NOTE:** If you have multiple users logging into a single scan station, RVI recommends creating a common user. This option allows you to setup a common user to be specified within the RVI.EXE while allowing for multiple user logins in One Look. Refer to the section labeled <u>Common User Swap</u> for more details.

4. RVI PC Viewer shows **IBM DATA QUEUES** in the bottom right hand corner. (*Only needed if scanning.*)

🕺 R	VI Im	nage S	System	9										_			×	
Imag	e S	can	Host															
5	\$	$\leftrightarrow$	K)	ÇH			٠	Æ	+	Н	•	M	Goto	6	-	<u>–</u>		
-				-				_			 			=				
Ready	,			Do	cument	: 0 of 0		(n	ione)			C	onnec	ted: IB	M DA1	ra que	EUES	/

If the viewer is not connecting, verify **Host/EHLLAPI** is set to IBM DATA QUEUES and the credentials are valid.

General ■ Screen Scrape ■ Index Options	You may change your EHLLAPI support type by choosing one of following:	of the
<ul> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60	
	Library RVILIB DQ Type IBM i User IBM i Address 12.26.223.217 IBM i User john IBM i Password ******	Cancel

5. One Look browser shows Host-Socket Connected.

Image Inquiry (Host-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
- 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.*

### 4.3.5. G = HLLAPI Support in One Look, No Polling

This configuration is no longer needed if you are running 2020 or newer RVI code.

### **Type G Configuration**

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

For setup instructions, view the RVIOneLook.exe video.

When a 5250 emulation session 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 requests are triggered from the 5250 session and RVIOneLook.exe using the Twain scanner driver.

#### Requirements:

- 1. Active 5250 session
- 2. OneLook.exe installed and configured

#### 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.

To default RVIOneLook.exe scanning to PDF, set control file parameter \*TWTIFF = N.

From an IBMi command line with RVILIB in your library list

- Type GO RVMAINT
- Option 6 Maintain System Control File Parameters
- Control File Record = \*TWTIFF
- Description = Y



### 5. LOGIN

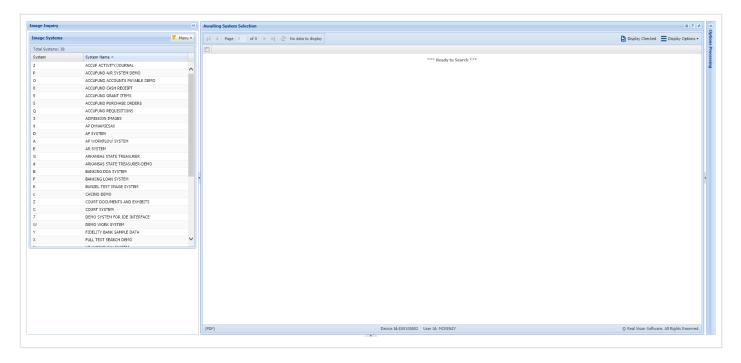
- 1. Open your internet browser.
- 2. Navigate to http://ipaddress:port/internet/cmnss/imageinquiry/app/index.html.

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

3. Enter a valid internet user id and password.



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



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

### 6. MENU

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

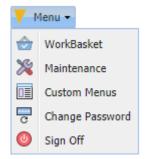
<b>V</b> -N	1enu 👻
٢	WorkBasket
×	Maintenance
	Custom Menus
e	Change Password
٢	Sign Off

### 6.1. WorkBasket

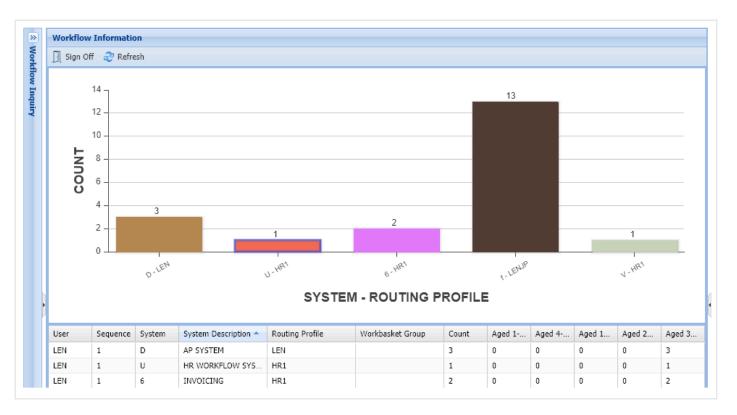
To watch a video on this topic CLICK HERE

To access workbaskets and workflow functions, from One Look:

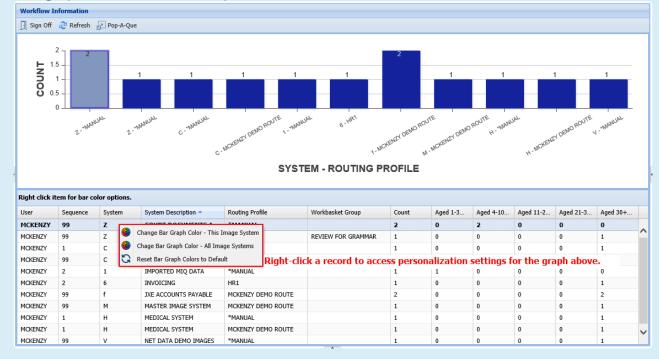
1. Click the **Menu** button, select **WorkBasket** from the drop down list. (Workbasket access is based on the One Look user id.)



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



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



- 2. Double-click a record to see a list of documents contained within the workbasket.
- 3. Work with the documents that have been routed to the workbasket by double-clicking a record or enable

Display Checked Items

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

z-coui	RT DOCUMENTS	AND EXHIBITS User = MO	CKENZY, Routing Profi	ile = *MANUAL						
듶 Bac	:k 🕜 Que Up Fo	or Approval 📄 Que Up For Ba	tch Indexing 🔡 Pop-/	A-Que Records: 5 Selec	ted: 5				Display Options 🔹 💽 V	Vorkbasket Cha
inst -	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE	$\bigcirc$	Display Checked Items	S OLD
V Fla	ags							11	Show Row Numbers	
	030299	08/15/2017	S CLAUSE	M CLAUSE	D	SMITH	JUDGEMENT		Grid To Excel	
	022618	11/29/2018	J GOOD	E LIVINGSTON	W	S ELMS	FILE	5	* 0	
	012419	01/23/2019	H ILES	E REED	W	Q WILES	ORDER	3	* 0	
	031619	01/29/2019	V VERSION	P VERSION	0	J MILES	ORDER	;	* 0	
7	011319	04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT		* 0	

2	U-HR WORKFLOW SYSTEM User = LEN, Routing Profile = HR1												
Workd	🗲 Back 🔽 Que Up For Approval 📳 Que Up For Batch Indexing Records: 2 🛛 🕅 Display Checked Items 🏣 Show Row Numbers 🖆 Workbasket Charts												
leffor .		Flags	EMPLOYEE #	DATE	DEPT	DOCUMENT TYPE	PRIORITY CODE	DAYS OLD					
The		riags											
ž			1000	06/21/2018	CLERK	APP		102					
		۵	1200	06/22/2018	IS	BC	6	0					

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

	Flags	E	MPLOYEE #		DATE	DEPT	DOCUMEN	IT TYPE	PRIORITY CODE	DAYS OLD	
		1000			06/21/2018	CLERK	APP			102	
		Notes	s Listing								
		Flags	User	No	te		Entry Date	Close Date			
C LEN JUI			DY HASN'T APPROVED I	Т	07/19/18 09/1	09/10/18					

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

U-H	R WORKFLO	W SYSTEM User = LEN	l, Routing Profile = HR1				۵ ?
U-H	Back 🔽 Q	ue Up For Approval 🛛 📑 Qu	e Up For Batch Indexing	Records: 2	Display Checked Items	Show Row Numbers	溢 Workbasket Charts 🗸
	Flags	EMPLOYEE #	DATE	DEPT		PRIORITY CODE	DAYS OLD
				CI EDV.			
	i ii	1000	06/21/2018	CLERK	APP		102
	۵.	1200	06/22/2018	15	BC	6	0
		<ul> <li>Index Details</li> <li>Index Mainter</li> <li>Audit Informa</li> <li>Z-Options</li> <li>Show In Wind</li> </ul>	tion	Right-click a line shortcut menu o	e item to access t f functions.	he	
	ave the h Indexing			irectly from the to the system's		using the	Approval and
ch pr	rovides	6	Que Up For Approv		e Up For Batch Index		

Page 36 of 312

Email		
<ul> <li>(j) Index Details</li> <li>(j) Index →</li> </ul>	APPLICATION FOR EMPLOYMENT	22 G. G.
index Maintenance	PERSONAL INFORMATION DATE OF APPLICATION: 9-10-11	12
Approval	Name: Doc Alex Last First Middle	
<ul> <li>Audit Information -</li> <li>Routing -</li> </ul>	Address: 100 Main St. Apt 201 Springfield IL 62703 Street (Apt) City/State Zip	5
Move Subgroup	Alternate Address:	
Call Back	Contact Information: 555 555 (555) 5555 (555) 444 - 4444 jdoc@envil.com Home Telephone Mobile Telephone Email	n
	POSITION SOUGHT: Sales Manager Available Start Date: 9-6-11	
	Desired Pay Range: <u>\$79,500</u> Are you currently employed? <u>No</u> Hourly or Salary	
	Desired Pay Range:       79,500       Are you currently employed?       No         Hourly or Salary       Hourly or Salary       EDUCATION         Name and Location       Graduate? - Degree?       Major / Subjects of Study	
	EDUCATION	
	EDUCATION Name and Location Graduate? - Degree? Major / Subjects of Study High School	
	EDUCATION Name and Location Graduate? - Degree? Major / Subjects of Study High School Springfield High- IL Yes General Studies	
Image ID:UAAAAB63	EDUCATION Name and Location Graduate? - Degree? Major / Subjects of Study High School Springfield High - IL Yes General Studies College or University Springfield University, IL Yes Bacholors - Busine Specialized Training,	

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

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

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

5

Stapled documents are available. View the document()s) stapled to the primary document.

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

🔦 Back 🔽 Que Up For Approval 📳 Que Up For Batch Indexing Records: 2 🔛 Display Checked Items 🏣 Show Row Numbers 🕍 Workbasket Charts									
	-	EMPLOYEE #	DATE	DEPT 🔻	DOCUMENT TYPE PRIORITY CODE				
	Flags	×	×	<	× A Sort Ascending ×				
	<b>İ</b>	1000	06/21/2018	CLERK	X ↓     Sort Descending				
		1645	08/28/2018		Columns 🕨				

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

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

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

							00000		1	
← Back 🔽 Que Up For Approval 📳 Que Up For Batch Indexing Records: 2							SQSEQ	d Items	Show Row	Numbers 🛛 🕍 Workbasket Charts
							SQSYS	T TYPE		PRIORITY CODE
	riags	2	×	A 2	Sort Ascending		SQAPPR		×	×
	]	1200	06/22/2018	ZA	Sort Descending		SQUSRR			*
		1000	06/21/2018				SQRTSN			*
_					Columns		SQDATR			
							SYSTRAN			
							URK			
							GRP			
							USER BASKET			
							WB INSTANCE			
							EMPLOYEE #			
							DATE			
							DEPT			
							DOCUMENT TYPE			
							TYPE			
							PATH			
							FILE			
							CREATE-DATE			
							VIEW-DATE			
							PAGES			
							DELETE			
							NOTES			
Re	eal Vision Image	Inquiry	Device Id:\$0010	7128	User Id: MCKENZY		ROUTE		© Real	Vison Software. All Rights Reserved
					A					

### 6.1.1. WorkBasket Tools

To watch a video on this topic CLICK HERE

**Right-Click Menu** 

Ē	Show Notes
+	Add Notes
$\geq$	Email Image
1	Fax Image
뷺	Show Routing
	Index Details
10	Index Maintenance
Ť	Download
È	Audit Information
Z	Z-Options
•	Show In Window
R	Maintain Staple
2	Add to Staple Grid
2	Move Profile
)ee(	Move Subgroup
×	Remove From WorkBasket

Show Notes	Display existing notes and add new notes.(Will only appear if notes exist.)
Add Notes	Permits the user to type a note. If there is a note attached to an image, will appear at the left side of the index listing under the Flags column.
Email Image	Email the selected document.
Fax	Contact <u>RVI Support</u> for requirements.
Show Routing	Shows the sequence, route, date, and time associated with the routing event.
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.

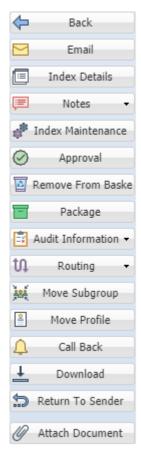
Maintain Staple	Update an existing stapled bundle. Only appears when the record you are selecting contains the primary stapled document.
Add to Staple Grid	Select a primary document then supporting documents from any system to the staple grid. Once all documents are in the staple grid the user can Finalize 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. ( <i>The staple grid is cleared automatically when the user logs off.</i> )
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.
Move Subgroup	Move the current image to a user defined subgroup within your workbasket.
Remove From WorkBasket	Remove the selected record from the workbasket.

#### Workflow Inquiry Toolbar

🖕 Back ⊘ Que Up For Approval 👔 Que Up For Batch Indexing 🎧 Pop-A-Que Records: 1 🛛 🕫 Page 1 of 1 🕨 🕅 🕹 Displaying 1 - 1 of 1

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

#### Image Display Top Toolbar

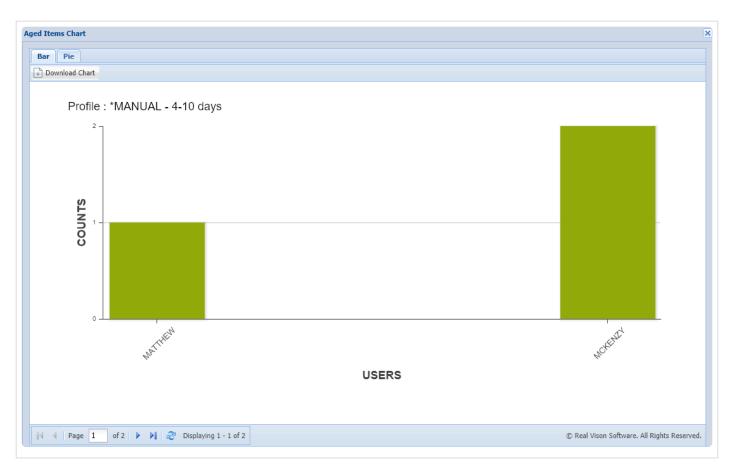


Back	Return to the list of items in the current workbasket.
Email	Email the selected document.
Index Details	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Notes	Permits the user to type a note and view existing notes. The icon will appear in red when a note exists.
Index Maintenance	Permits the user to update the index information for the selected image. This option also allows for deletion of the document.
Approval	Perform workflow approval on this item.
Remove 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, is will appear under the Flags column. If there is a package but some documents in the package are missing, is 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.)

Audit Information	Includes View, Workflow, and Approval audit. Display the history of the item including view, print, email, change, route, fax, cd, and signature requests.
Routing	Send the image to another Profile or User.
Move Subgroup	Move the current image to a user defined subgroup within your workbasket.
Move Profile	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to select the desired routing profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Call Back	Enter a target date that will trigger a future notification of an event that needs to occur and a descriptive message for the notification. If a call back reminder exists, $3$ will appear under the Flags column. If the call back is currently due, $3$ will appear. If the call back is overdue, $3$ will appear.
Download	Save the selected document to local storage.
Return To Sender	Return the document to the previous user in the routing sequence. This option will only appear if it can be determined that there is a previous user in the routing sequence.
Attach Document	Choose a file(s) to attach to the existing document on display. Once a file is attached, it will be stapled to the primary document.

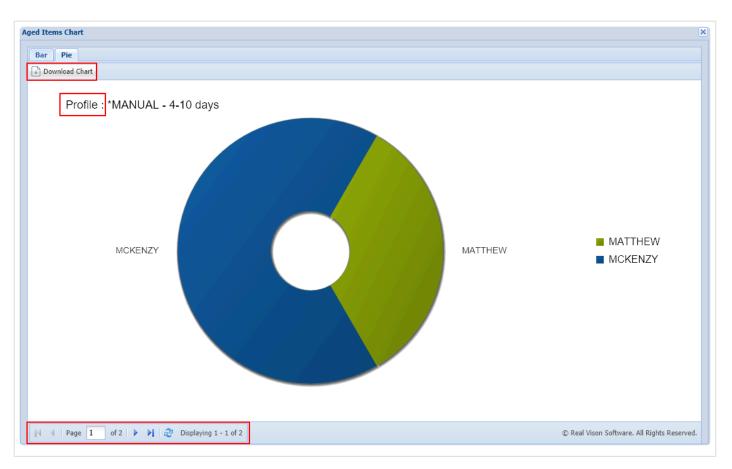
### 6.1.1.1. Aged Items Chart

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



All Items are classified into five categories:

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



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

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

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

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

# 6.1.1.2. Active and Forthcoming Chart

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

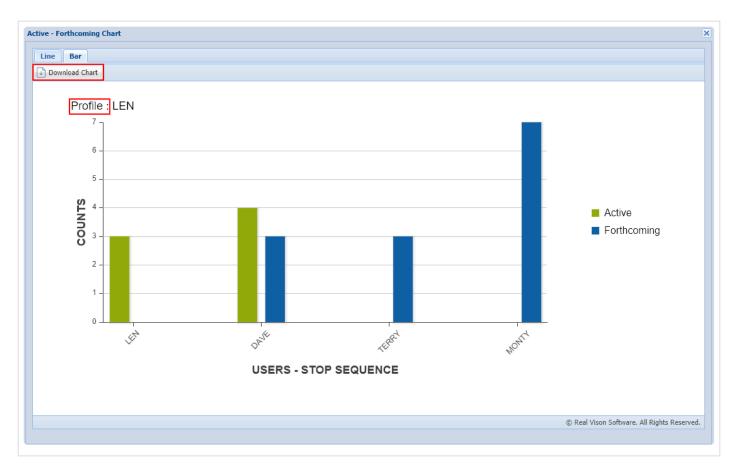


The Active-Forthcoming Chart uses tabs to display the data in two different formats, a combination of a bar and line charts. The Bars in the graph take the color green to denote the active items sitting on the user's sequence in the route. The blue line in the graph signifies the awaiting item to arrive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

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

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

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



#### 6.1.1.3. Totals Chart

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

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

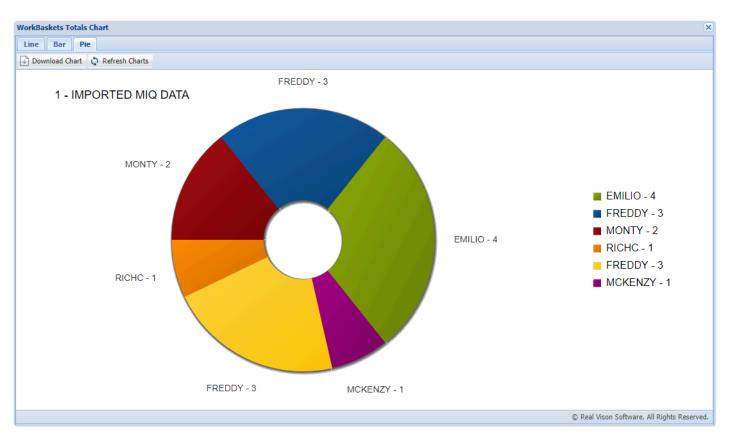
Line Chart:



#### **Bar Chart:**

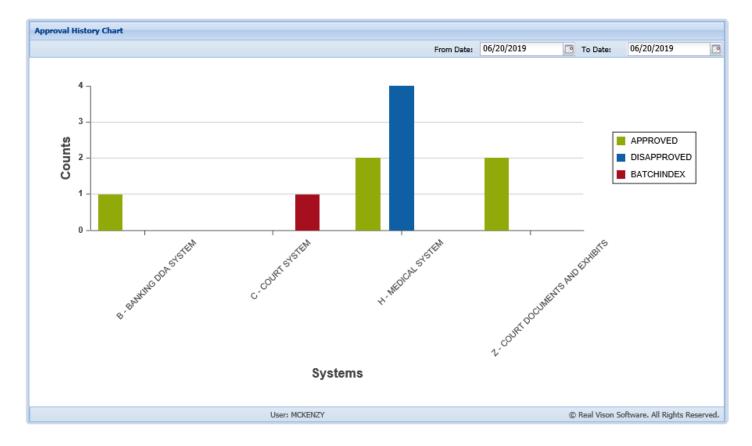


**Pie Chart:** 

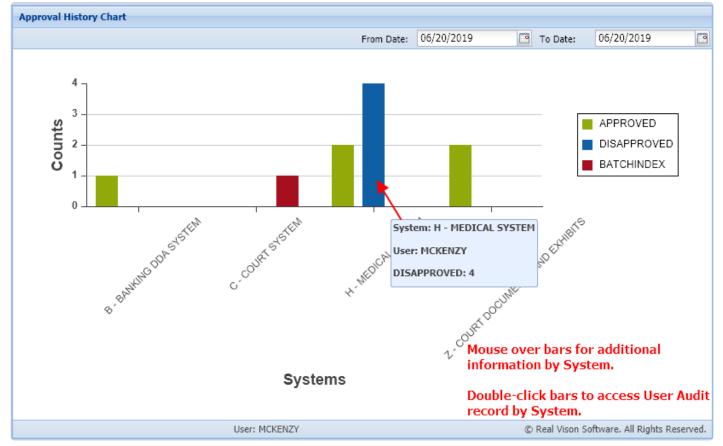


# 6.1.1.4. Approval History Chart

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



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



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

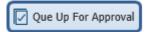
User Audit Information									
Kack Records: 4									
Index 1	Index 2	Index 3	Index 4	Index 5	Index 6	Index 7	Action	Date	Time
12345						APP	DISAPPROVED	06/20/2019	11:51:44
12345						APP	DISAPPROVED	06/20/2019	11:51:26
12345						APP	DISAPPROVED	06/20/2019	11:51:15
240164	01/20/2012				<b>k</b>	INSURANCE CA	DISAPPROVED	06/20/2019	11:51:09
						Double	e-click a reco	rd to view Wo	orkflow Audit.

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

Workflow Aud	it Information									
🔦 Back 🛛 Reco	rds: 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.

Workflow Inquiry			Back					
Queue Up Approval				PDF207	1 / 1   - 6	7% +	⊘ ±	🖶 i
	Submit 🔝 Skip 🚫 Cancel							
- Additional Information	]	Ģ						
_ Approval			Index Maintenance					
<ul> <li>Approve</li> </ul>	O Disapprove	G	Approval	INVO	DICE	Invoice Number Customer Number Invoice Date Payment Terms	120215722 600607284 January 9, 2012 Net 30	
Action Code	· · · · · · · · · · · · · · · · · · ·	E	Remove From Baske			Due Date Purchase Order	Feb 8, 2012	
- Notes			Package	7147 Hollister Springfield, CA		To	Sayes Office Supply 1045 NacArthur Dr Alexandria, LA 71301	
		£	Fax	ദ⇔ദ		c	Dustomer ID [ABC12345]	
		E	Audit Information -					
		Û		Salesperson	Job	Payment Terms Due on recept	Due Date	
- Notes List		ž	Move Subgroup		Service Description	Term	Line Total	
			Move Profile	1	Webmar Conferencing – 1 Month	31 Days	1,890 00	
L								
- Audit Information		4	Return To Sender					
		C	Attach Document					
					-			
L								
ND#:	CR130012600001201812131103							
CASE:	CR1300126			L		Subtotal Sales Tax		
SEQ:	00001					Sales Tax Total		
DATE:	20181213			ટ⇔ટ		Make all ch	ecks payable to WCU	
DOCUMENT TYPE:	APP				Connecting Your World		your business!	
PRIORITY CODE:								
DAYS OLD:	882	•	Image ID:VAAAAAIV					

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 Codes:	Permits the user to select from a predefined list of codes. Setup predefined <u>Action Codes</u> as 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.
Approval:	Reopens the approval panel if it is closed.
Remove From Basket:	Remove the selected record from the workbasket.
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.( <i>The Package icon is only present when a package is setup.</i> )
Fax:	Contact <u>RVI Support</u> for requirements.
Audit Information:	Includes View, Workflow, and Approval audit. Displays the history of the item including view, print, email, change, route, fax, cd, and signature requests.
Routing:	Show Routing history of the document, Route To User, or Route Using Profile.
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. If a call back reminder exists, sill 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. <i>This option will only appear if it can be determined that there is a previous user in the routing sequence.</i>
Attach Document:	Choose a file(s) to attach to the existing document on display. Once a file is attached, it will be stapled to the primary document.

### 6.1.3. Que Up For Batch Indexing

To watch a video on this topic CLICK HERE

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

Workflow Inquiry			$\diamond$	Back			_				
Batch Indexing				Email	≡		1 / 1   -	+   🕄	Ś	± 🖶	:
🔲 Retrieve Indexes 🚺 Ad	d to Previous Doc 📋 Upload 🖉 Attach			Index Details							<b>A</b>
ND#:	CR13001260000120181213110330		e	Notes 🗸							
CASE:	CR1300126		-	Package							1
SEQ:	00001		ųů.	Fax		INVO	NCE	Invoice No Customer No	umber	120215722 600607284	
DATE:	20181213			dit Information 👻		TIAAC			Terms e Date	January 9, 2012 Net 30 Feb 8, 2012	
DOCUMENT TYPE:	APP		<u>ព</u>	Routing -			nces Unlimited	Purchase		ayes Office Supply	
Split PDF	🧭 Submit 🔝 Skip 🚫 Cancel			Nove Subgroup		7147 Hollister Springfield, CA				1045 NacArthur Dr Alexandria, LA 71301	
			, 1975 1	Move Profile		ഷ⇔മ			с	ustomer ID [ABC12345]	
				Call Back		0.0					
			<u>+</u>	Download		Salesperson	30b	Pay Ter	yment rms	Due Date	
					1 1	L		Due	on receipt		
			\$⊃ R	eturn To Sender	1 1	*	Service Description	Ter	31 Days	Line Total 1,890 00	
		1	10 A	ttach Document			reality concreting - 1 Honor		JI Days	1,000 00	
											1.1
							,				
									Subtotal	1890 00	
									Sales Tax Totai	1890 00	
						00					
						_ X⇔x				acks payable to WCU	
			Imag	e ID:VAAAAAIV	•	l	Connecting Your World	TÌ	hank you for	your business!	+

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

Retrieve	Used to retrieve index information from a customer's database.
Indexes:	

	<b>Custom Feature</b> <i>Will only appear for customers specifically setup for this feature. Contact RVI Support for details on integrating this feature.</i>
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 Upload 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.
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.( <i>The Package icon is only present when a package is setup.</i> )
Fax:	Contact <u>RVI Support</u> for requirements.
Audit Information:	Includes View, Workflow, and Approval audit. 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. 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:	Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.
Return To Sender:	Return the document to the previous user in the routing sequence. <i>This option will only appear if it can be determined that there is a previous user in the routing sequence.</i>
Attach Document:	Choose a file(s) to attach to the existing document on display. Once a file is attached, it will be stapled to the primary document.

# 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 Parame	ters	(c)Copyright		1992, 1999 FM/FORMAT0
- - - - - - - - - - - - -	t Image Security By User Option Security By User Index Level Security By User Internet User Profiles Internet User Access (Customer Routing Pop-A-Queues Screen Scrape Indexing Pop-A-Ba Routing Workbasket Access Routing Destinations User Index Maintenance Restrict Run Parameters Twain Scanning Users	skets		
F3 =Exit		E	Enter	=Continue
M <u>A</u> D				

5. F10 = Add User

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

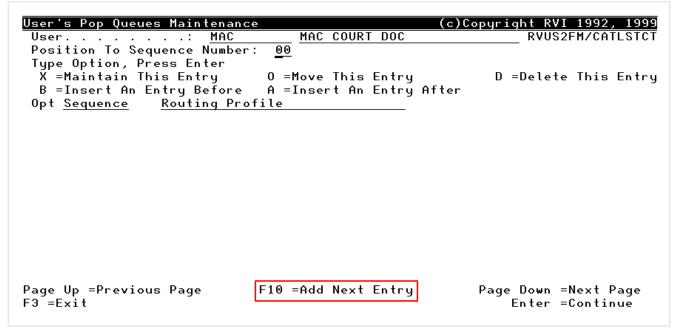
6. Enter the IBMi host system user id and description then press enter.

	Pop Queues Maintenance (c)Copyright RVI 1992, 1 RVPQMFM/SFL	
X=Selec		
Positio		
<u>X</u> <u>User</u> KIMAF		
	NZY MCKENZY'S POP A QUEUES	
	NZI HCKENZISPOPH QOEOES	
_ ""	User-Specific Parameters	
	User: MAC	
	Description: <u>MAC COURT DOC</u>	
	F3 =Exit Enter =Continue	
F3 =E		om ue

7. F10 = Add Next Entry

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

Press to continue.



8. Specify a routing profile.

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

User's Pop Queues Mainter	lance	(c)Copyright RVI 1992, 1999 RVUS2FM/FORMAT2
User: Sequence: Routing Profile: Delete Code:	01	F8 To Select
F3 =Exit	F12 =Cancel	Enter =Continue

Repeat Steps 7 – 8 as needed.

User's Pop Queues Maintenance	e (c)	Copyright RVI 1992, 1999
User MAC	MAC COURT DOC	RVUS2FM/CATLSTCT
Position To Sequence Number	: <u>00</u>	
Type Option, Press Enter		
X =Maintain This Entry B =Insert An Entry Before		D =Delete This Entry 1
Opt Sequence Routing Pro		1
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.

Sign Off	Refresh	Pop-A-Qu	2			2 –						
COUN	.5 1 5 0	JAL Z-	1 1 MANNUAL CMANUAL	1 1	1 المراجع المراجع	XEALEN DENO PE	JUTE NOVENEY DEM	POUTE H- MAN		1 CI DENIO ROUTE	1 Manual	
					· · · · · · · · · · · · · · · · · · ·	`	ęe,		41			
-	item for bar co	lor options.		SYS						Aged 21-2	Aged 201	
User	Sequence	lor options. System	System Description *	SYS Routing Profile	Vorkbasket Group	Count	Aged 1-3	Aged 4-10	Aged 11-2	Aged 21-3	Aged 30+	
User MCKENZY	Sequence 99	System Z	System Description A	SYS Routing Profile	Workbasket Group	Count 2	Aged 1-3 0	Aged 4-10 2	Aged 11-2 0	0	0	~
User MCKENZY MCKENZY	Sequence 99 99	System Z Z	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND	SYS <sup>®</sup> Routing Profile *MANUAL *MANUAL		Count 2 1	Aged 1-3 0 0	Aged 4-10 2 0	Aged 11-2 0 0	0	0	^
User MCKENZY MCKENZY MCKENZY	Sequence           99           99           1	System Z C	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM	Routing Profile *MANUAL *MANUAL *MANUAL	Workbasket Group	Count 2 1 1	Aged 1-3 0 0 0 0	Aged 4-10 2 0 0	Aged 11-2 0 0 0	0 0 0	0 1 1	
User MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           99           1           99	System Z C C	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM	Routing Profile  *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE	Workbasket Group	Count 2 1 1 1 1	Aged 1-3 0 0 0 0 0 0	Aged 4-10 2 0 0 0 0	Aged 11-2 0 0 0 0 0	0 0 0 0	0 1 1 1	
User MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           99           1	System Z Z C C 1	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM IMPORTED MIQ DATA	Routing Profile  *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE *MANUAL	Workbasket Group	Count 2 1 1 1 1 1 1 1	Aged 1-3 0 0 0 0	Aged 4-10 2 0 0	Aged 11-2 0 0 0	0 0 0	0 1 1 1 0	^
User MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           91           92           1           99           2	System Z C C	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM	Routing Profile  *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE	Workbasket Group	Count 2 1 1 1 1	Aged 1-3 0 0 0 0 0 1	Aged 4-10           2           0           0           0           0           0           0           0           0	Aged 11-2 0 0 0 0 0 0 0 0	0 0 0 0 0 0	0 1 1 1	
User MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           99           1           99           2           2	System Z Z C C C 1 6	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM IMPORTED MIQ DATA INVOICING	Routing Profile *MANUAL *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE *MANUAL HR1 MCKENZY DEMO ROUTE	Workbasket Group	Count 2 1 1 1 1 1 1 1 1 1 1	Aged 1-3 0 0 0 0 0 1 1 0	Aged 4-10 2 0 0 0 0 0 0 0 0	Aged 11-2 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0	0 1 1 1 0 1	
User MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           1           99           2           2           99	System Z Z C C C 1 6 6 f	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM IMPORTED MIQ DATA INVOICING JXE ACCOUNTS PAYABLE	Routing Profile *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE *MANUAL HR1	Workbasket Group	Count 2 1 1 1 1 1 1 1 1 2	Aged 1-3 0 0 0 0 0 1 1 0 0 0	Aged 4-10 2 0 0 0 0 0 0 0 0 0 0 0	Aged 11-2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0	0 1 1 1 0 1 2	
User MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY MCKENZY	Sequence           99           91           99           1           99           2           2           99           99           99           99           99           99           99           99           99           99           99           99           99	Vertical state       Vertical	System Description A COURT DOCUMENTS AND COURT DOCUMENTS AND COURT SYSTEM COURT SYSTEM IMPORTED MIQ DATA INVOICING JXE ACCOUNTS PAYABLE MASTER IMAGE SYSTEM	Routing Profile *MANUAL *MANUAL *MANUAL *MANUAL MCKENZY DEMO ROUTE MARUAL HR1 MCKENZY DEMO ROUTE	Workbasket Group	Count 2 1 1 1 1 1 1 1 2 2 1	Aged 1-3 0 0 0 0 0 1 1 0 0 0 0 0 0	Aged 4-10 2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Aged 11-2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0 0 0 0 0 0 0 0 0 0	0 1 1 1 0 1 2 1	



is pressed:

• If the user is set up with multiple Pop-A-Que entries, a selection list will be presented.

	op-A-Que Selection		
User Count	User		
4	APPROBLEM		
5	APBATCH		

• If the user is set up with only one Pop-A-Que entry, the queue will automatically pop.

#### 6.2. Maintenance

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

1. Select Maintenance from the Menu drop down list.



2. Login to the Maintenance menu.

e Look	Maintenance	×					
0							
				Real Vision Software			
				User ID:			
				Password:			
				© Real Vision Software	遇 Log	) In	
-							

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

Menu Maintenance	
🕘 Sign Off	
SYSTEM MAINTENANCE	
MAINTAIN SYSTEM CONTROL FILE PARAME	TERS
MAINTAIN IMAGE SYSTEM DESCRIPTIONS	AND KEY FIELDS
SECURITY MAINTENANCE	
MAINTAIN OPTION SECURITY BY USER	
INDEX LEVEL SECURITY	
MAINTAIN USER SECURITY	
DOCUMENT TABS MAINTENANCE	
MAINTAIN DOCUMENT TYPES	
MAINTAIN DOCUMENT TAB PROFILES	
MAINTAIN DOCUMENT TAB GROUPS	
EMAIL MAINTENANCE	
MAINTAIN EMAIL ADDRESS BOOK	
SCANNING MAINTENANCE	
MAINTAIN SCANNING PROFILES	
WORK BASKET MAINTENANCE	
MAINTAIN ROUTING PROFILES	
MENU SECURITY MAINTENANCE	
MAINTAIN MENUS	
MENU SECURITY	
SIGNATURE CAPTURE MAINTENANCE	MENU
MAINTAIN SAVED SIGNATURES	
User Id: MCKENZY	© Real Vison Software. All Rights Reserved.

#### 6.2.1. System Maintenance

#### SYSTEM MAINTENANCE

MAINTAIN SYSTEM CONTROL FILE PARAMETERS

MAINTAIN IMAGE SYSTEM DESCRIPTIONS AND KEY FIELDS

In this section of Maintenance, the RVI Systems and their associated indexes will be created and maintained. There is also the option to setup RVI System control file parameters for common functions and defaults.

# 6.2.1.1. Maintain System Control File Parameters

Allows for the editing and creation of system control file parameters.

The majority of control file parameters will not need to be edited.

Double-click a Key Field to edit or select **Add System File Parameter** for creating a new control file parameter.

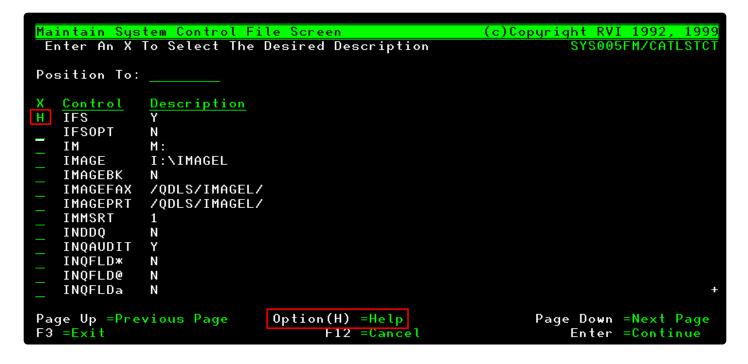
System Control Maintenance		
🚫 Close 🛛 🗖 Add System File Parameter		
Key Field 🔻	Control Data	
IFS	Y	
CHECKTIF	N	
CDIFMTmm	N	
CDIFMTI	N	

For a list of the control file parameters typically applicable to customer specific environment functions. got to the RVI Maintenance Menu on the IBMi or click <u>HERE</u>.

From an IBMi command line, with RVILIB in your library list, type **GO RVMAINT** Option **6** Maintain System Control File Parameters F1 = Help



You can also leave the Control File Record field blank then press *Enter* to see the list of control file parameters that are currently setup. This list will match the list you see in OneLook under the Maintenance tab/System Maintenance/ Maintain System Control File Parameters. Put an **H** next to any entry for a description.



#### 6.2.1.2. Maintain Image System Descriptions and Key Fields

RVI offers up to 65 individual imaging systems with each system providing seven key index fields that are user defined with the ability to expand indexing to 99 key index fields. The user can establish multiple imaging systems with specific indexing criteria for each system.

This menu option allows for the editing and creation of system values. The system value will designate the single character value the system will be identified by within RVI.

System values can be 0 - 9, A – Z (upper and lower case), and \$, #, or @.

»							
Maintain Image Systems And Key Fields							
Submit O Cancel							
Z							
OCUMENTS AND EXHIBITS							
1							
CASE #							
06							
0							
~							
✓							
Υ 💌							

The format layout options for index fields are:

0	When Field Exit is pressed, Zero Fill, Right Adjust, Numeric.
N	When Field Exit is pressed, Blank Fill, Right Adjust, Numeric.
В	When Field Exit is pressed, Blank Fill, Right Adjust, Alpha/Numeric.
Blank	When Field Exit is pressed, Blank Fill, Left Adjust, Alpha/Numeric.

(To enable the Format Option, set the <u>System Control File Parameter</u> (**VINDEX**) to **Y** for Yes. This is an optional field.)

**Range:** (**Y** = Yes, *Blank* = No) This option permits the user, by Index Field, to have the ability to search within a specified range. *This is an optional field.* 

**Mandatory:** (**Y** =Yes, *Blank* =No) Allows you to specify indexes that are mandatory when performing image inquiry on this system. *This is an optional field.* 

**Date:** (**Y** = Yes, **N** = No) Identify the index field as a Date field.

**Delete Record:** Permanently delete the current image system.

**System:** The single character value representing the system. This will become the System Identification Code for the imaging system.

**Description:** Enter a descriptive system name to correspond to the system value.

**Index #:** 1 – 99 (*Index 7 is reserved for Document Type*.) At least one index field is required.

**Index Description:** Enter a description for the index # defined above.

**Length:** The numeric length of the information contained in each Index Description field.

**Format:** Wild card search is only available with a B or blank setting.

# **6.2.2. Security Maintenance**

#### SECURITY MAINTENANCE MAINTAIN OPTION SECURITY BY USER INDEX LEVEL SECURITY MAINTAIN USER SECURITY

In this section of Maintenance, establish security for each individual Imaging System based on the application requirements. Security can be set by user, group, index, and system levels.

# 6.2.2.1. Maintain Option Security By User

Use this option to include or exclude users from options within a select System.

To edit an existing entry, *double-click* the record. To delete an existing entry, *right-click* the record. To create a new entry, select **Add User Option Security** to create a new entry.

Maintain Option Security by User			
📀 Close 🔞 Add User Option Security			
User Profile	System ID	Option	Include/Exclude
MCKENZY			▼
MCKENZY		( ~ OneLook Workbasket Menu Option	I
MCKENZY X Delete User Option	Right-click to delete user option.	+ ~ OneLook Batch Indexing	I

#### Add User Option Security:

Add User Option Se	curity	×
User Id:		
System ID:		~
Option Code:	1	~
Include/Exclude:	( $\sim$ OneLook Workbasket Menu Option	~
	+ ~ OneLook Batch Indexing	
	~ OneLook Additional Index Func	
	! ~ OneLook Download Function	
	* ~ View Unredacted	
	) ~ OneLook Maintenance Menu Opt	
	- ~ OneLook Change Password Menu O	
	? ~ See Routing	
	@ ~ OneLook Temporary Grid Functio	
	= ~ OneLook Import Functions	
	c ~ Change Priority	
	$d \sim \text{Allow Deletion}$ in Index Maint	
	e ~ PC Viewer Email	$\sim$
	k & Approv/Disapprov History	

User Id: One Look user id.

**System ID:** The code associated with the System this rule will applies to. (*Blank* = all Systems.)

**Option Code:** The code associated with the option this user will be included in or excluded from. (*Blank* = all Options.)

**Include/Exclude:** I = give user access, E = block user access.

### 6.2.2.2. Index Level Security

Grant access to reports/documents based on individual index values.

Index Level Security Maintenance								
🚫 Close Η Add 🤮 User Defined Groups	🛇 Close 🛨 Add 🚓 User Defined Groups 🖽 Value Groups							
System								

Add Index Level Se	curity	×
System:	Select system	~
Index#:		
Value:		
User:	Select User	~
Type I/E/O:		~
		Submit

**System:** The Image System ID Code for which an index is to be secured. **Index#:** The index number to be secured.

Value: The value being secured. This can be an actual index, a Value Group, or a wildcard value (ex: PAY\*). An asterisk in the first position is not considered a wild card.User: The user being secured. Type I/E/O: Include, Exclude, Omit.

Index Level Security Maintenance					
🔇 Close 🛨 Add 🚓 User Defined Groups 🔳 Value Groups					
System	Index	dex Value User Type			

Options Processing	>
User Defined Groups Ma	aintenance
🕂 Add 🔣 Cancel	
Group Name	Group Member

**Group Name:** The name being applied to the User-Defined Group. Use a name that is not the same as an IBM Host System User Profile or an IBM Host System Group Profile.

Group Member: The user being assigned to this Group. This must be a valid IBM Host System User ID.

Index Level Security Maintenance	ex Level Security Maintenance				
📀 Close 🛨 Add	这 Close 🛨 Add 🚓 User Defined Groups 🔳 Value Groups				
System	Index	lex Value User Type			

Options Processing	»
Value Groups Maintena	nce
🕂 Add ⊘ Cancel	
Group Name	Index Value

**Group Name:** The name being applied to the Value Group. Use a name that is not the same as an index. **Index Value:** Enter the index being assigned to this Value Group.

#### 6.2.3. Document Tabs Maintenance

#### DOCUMENT TABS MAINTENANCE

MAINTAIN DOCUMENT TYPES MAINTAIN DOCUMENT TAB PROFILES MAINTAIN DOCUMENT TAB GROUPS In this section of Maintenance, setup and maintain Document Tabbing.

Documents Tabs enable the user to filter the imaging system database information for either security or convenience purposes.Document Tabs are used to group Document Types together for specific applications.

The steps needed to set up Document Tabs are:

- JA Identify the different documents and assign them a Document Type and Description.
- The Establish Document Tabs for grouping of related documents.
- Establish Group Tabs for grouping of related Document Tabs.

#### 6.2.3.1. Maintain Document Types

Establish a new document type or edit an existing document type.

Document	Type Maintenance						
🚫 Close	Add Document Type						
Documen	t	Description		Routing Priority		Scan In Color	
BH0							
BH01		BLACK HILLS RPT		To edit an exis	ting entry, double-click	the record. To delete a	n
BH02		BLACK HILLS IMAGE			right-click the record a	and select Delete Recor	d.
BH03		BLACK HILLS PDF	X Delete Record				

Document Type:	Document Type:	
Document Description:	Document Description:	
Routing Priority:		×
Scan In Color Y/N:	Scan In Color Y/N:	*

**Document Type:** Highlight an existing Document Type from the list or enter a new value.

**Document Description:** Enter the form description that corresponds to the Document Type.

**Routing Priority:** The priority 1 - 9 is assigned to this Document Type and used to move the document up or down in the users work queue. (Optional)

Scan In Color Y/N: If this document is to be color scanned, enter a Y here. If not, leave it blank.

#### 6.2.3.2. Maintain Document Tab Profiles

Establish Document Tabs for grouping of related documents. Set up or change the Document Tab Profiles.

Document Tab Maintenance		Options Processing	>>
Sclose Add Document Tab		Document Tab Maintenanc	e
Document	Description	Document Tab:	AA
AA	ATT ONLY	Document Tab Description:	ATT ONLY
AB	BLUE CROSS ONLY	Delete Record:	Double-click an existing entry, to update or
AC	SAFEWAY ONLY		delete the record.
AP	PURCHASE ORDERS ONLY	🚫 Close	Submit

**Document Tab:** Highlight an existing Document Tab from the list or enter a new value. **Document Tab Description:** Enter the form description that corresponds to the Document Tab. **Delete Record:** Enable to delete the existing record.

#### 6.2.3.3. Maintain Document Tab Groups

Establish Tab Groups for grouping of related Document Tabs.

Group Tab Maintenance		Options Processing	»
🔕 Close 📔 Add Document Group		Group Tab Maintenance	
Document Group	Description	Group Tab:	AA
		Group Tab Description:	ATT BC SAFEWAY
AA	ATT BC SAFEWAY	Delete Record:	Double-click an existing entry, to
AP	ACCOUNTS PAYABLE DEMO TAB		undate or delate the record
ВК	BANKING DOCUMENT TAB	O Close	update of delete the record. 🥥 Submit

Group Tab: Highlight an existing Groupt Tab from the list or enter a new value.

**Group Tab Description:** Enter the form description that corresponds to the Document Tab. **Delete Record:** Enable to delete the existing record.

### 6.2.4. Email Maintenance

#### EMAIL MAINTENANCE MAINTAIN EMAIL ADDRESS BOOK

In this section of Maintenance, setup and maintain your E-Mail Address Book.

### 6.2.4.1. Maintain Email Address Book

Add and maintain email addresses.

Email Maintenance			
🔕 Close 🔀 Add Email			
Name		Email Address	To edit an existing entry, double-click the record. To delete an
RVI			To edit an existing entry, double-click the record. To delete an existing entry, right-click the record and select Delete Record.
RVIBP		RVOFFICE@REALVISIONSOF	TWARE.COM
RVIBP70		info@realvisionsoftware.com	
	🗙 Delete Record		

User Name:	User Name	
Email Address:	Email Address	

### 6.2.5. Scanning Maintenance

SCANNING MAINTENANCE MAINTAIN SCANNING PROFILES

In this section of Maintenance, setup and maintain Scan Profiles.

### 6.2.5.1. Maintain Scanning Profiles

Establish a new scan profile or edit an existing profile.

Scan Profile Maintenanc	e			
S Close Add Scan Profile To edit an existing entry, double-click the record.				
Scan Profile	Description	Туре	System	
ACCUFAR	ACCUFUND AR BATCHES	BATCH	P ~ AF A/R SYSTEM DEMO	
ACCUFCR	ACCUFUND CASH RECEIPTS	BATCH	0 ~ AF CASH RECEIPT	
ACCUFPO	ACCUFUND PO'S	BATCH	S ~ AF PURCHASE ORDERS	
ACCUFRQ	ACCUFUND REQUISITIONS	BATCH	Q ~ AF REQUISITIONS	
ACCUF1	ACCUFUND BATCHES	BATCH	0 ~ AF ACCOUNTS PAYABLE D	
AP DOCS	ACCOUNTS PAYABLE INVOICES	5 BARCODE	A ~ AP WORKFLOW SYSTEM	
AP-SEPERAT	ACCUFUND AP BARCODE SEPE	BARCODE	0 ~ AF ACCOUNTS PAYABLE D	
APSCANNING	SCANNING AP DOCUMENTS	BATCH	A ~ AP WORKFLOW SYSTEM	
BAR997	#997 BARCODES	BARCODE	W ~ DEMO WORK SYSTEM	
BATCHB	INDIVIDUAL PAGES	BARCODE	B ~ BANKING DDA SYSTEM	
COURT DOCU	COURT DOCUMENTS FOR SYS.	BATCH	Z ~ COURT DOCUMENTS AND	
DYNAMICX	INDIVIDUAL SCANNING FOR D	BATCH	9 ~ AP DYNAMICSAX	

To establish a new scan profile, click **Add Scan Profile** then fill in the required fields.

Options Processing		≫
Maintain Scanning Profiles		
🚫 Close	Sub	mit
Scanning Application:		
Scanning Description:		
Scanning Type:		~
Image System ID:		~
INDEX CONSTANTS VALUES Document Type:		~
Index-1:		
Index-2:		
Index-3:		
Index-4:		
Index-5:		
Index-6:		
Bar Code Type:		~
Set Batch Index Flag:	N/Y	~
Routing Profile:		~
or Prompt For Routing Profile:	N/Y	~
Destination: P=PC D=Direct:	P=PC D=Direct	~
Upload On Exit:	N/Y	~
Color Scanning:	N/Y	~
Use Verification PGM:	N/Y	~
Notification Window:		~
Message:		
Delate Decent		
Delete Record:		

Scanning Application: The name of the scan profile.

**Scanning Description:** Descriptive details identifying the scan profile.

Scanning Type: 1 = Standard, 2 = Batch, 3 = BarCode

**Image System ID:** Select the image system code for the scanned documents.

#### INDEX CONSTANT VALUES

**Document Type:** When used in the 7th index, it allows the document type selection based on one of the following: document type name, **?** for all document types on file, **?TT** for all documents in document tab, **?GT**\* for all documents in group tab.

**Index 1 – Index 6:** Allows pre-loading of indexes. Allows assigning of system date to any index in user-specified format. Allows assignment of system control file @parameter.

**Bar Code Type: 1** =Every Page Will Have a Bar Code (001); **2** =Scan Multiple Pages, Retain Bar Code Page (999); **3** =Scan Multiple Pages, Discard Bar Code Page (998); **4** =Scan Group of Pages, Change On Different Bar Codes (997); **5** =Scan Single Pages, Change on Different Bar Codes (996)

**Set Batch Index Flag:** (applicable only when Scanning Type = 2-Batch) Y for Yes will mark scans for batch indexing by placing a + in index 2. N for No will record the batch as already indexed, excluding it from the batch indexing menu.

Routing Profile: Will automatically route the scan to the routing profile specified here.

**Prompt For Routing Profile:** Y for Yes will prompt the scan operator to select the routing profile after scanning.

**Destination: P** = PC, **D** = Direct

**Upload On Exit:** If Y for Yes is used the system will force an upload at the end of the scan session. **Color Scanning:** If Y for Yes color scanning will be initiated.

**User Verification PGM:** If Y for Yes, program RVSAMPRP is called prior to scanning to perform any desired index verification. (Click <u>HERE</u> for more information on RVSAMPRP parameters.)

**Notification Window:** Used to display an optional user message prior to scanning. **1** – Never; **2** – Once, **3** – Always

**Message:** Specify the text that will display in the user's notification window prior to scanning. **Delete Record:** Enable to delete the existing scan profile.

### 6.2.6. Workbasket Maintenance

WORK BASKET MAINTENANCE

MAINTAIN ROUTING PROFILES

In this section of Maintenance, setup and maintain routing profiles for scanned documents. This process assigns personnel within each route and their viewing sequence. Access can be setup sequentially or with open access granting everyone in the route access to the documents at the same time.

## 6.2.6.1. Maintain Routing Profiles

Establish a new routing profile or edit an existing profile.

Routing Profile	Routing Profile Maintenance										
🚫 Close 🕅 A	S Close U Add Routing Profile										
Routing Profiles	OverDue Routing Rules Approval Rules Stop Rules										
MATTHEW MC MCKENZY MC2	Maintain Over Due Not Maintain Routing Rules Maintain Approval Rule		Right-click an existing record	to access these options.							
MECHANICAL MFORM	X Delete Route Profile An	nd All Related Records			Y						

Click Add Routing Profile to setup a new routing profile.

Options Processing	>>
Routing Profile Maintenano	e
🚫 Close	Submit
Route Name:	
Route To User:	×
Sequence:	
Arrival Notification:	×
Stop Rule:	
Email:	×
CD:	×
— In Primary User Absence —	
Route To User:	<b>v</b>
Date From:	
Date To:	
Delete Record:	

Route Name:	The name of the routing profile to be setup.
Route To User:	Individual or common user name used for routing. Set up or change the people assigned to this specific profile. Specifying *ROUTER as a user in a routing profile will substitute the User ID of the person who routed the image into that sequence of the route. This process will occur at routing time.
Sequence:	<ul> <li>Permits the user to establish the desired viewing and processing order.</li> <li>Delivery Sequence can be set up several different ways:</li> <li>1. The delivery sequence could be sequential (1,2,3). This would require user number 1 to delete the image from their workbasket after their work is completed before user number 2 could have access to the image, and user number 2 must delete the image from their workbasket after their work is completed before their workbasket after their work is completed before user number 3 can have access to the image to begin their work.</li> </ul>

	<ol> <li>2. The delivery sequence could be set for (1,1,2). This would permit the first two users in the routing profile to have access to the image at the same time, with the third user only having access to the image after the first two users deleted the image from their workbasket when their work was completed.</li> <li>3. The delivery sequence could be set for (1,1,1). This would permit all three users in this profile to have access to the image at the same time. Each would need to delete the image from their workbasket when they completed their work. The set up procedure shown above can be used to change the User ID in the future if users need to be added or removed from the routing profile or if the delivery sequence is modified.</li> </ol>
Arrival Notification:	Y/N to specify if this user is to receive notification when an item is placed in the user's workbasket.
Stop Rule:	Y/N to specify if this stop in the route is required.
Email:	Y/N to specify if documents will be routed to email.
CD:	Y/N to specify if documents will be routed to CD.

#### In Primary User Absence

Route To User:	Select the an existing user from the drop down list.
Date From/Date To:	This is the time period for either a suspended user or an alternate user.

**Delete Record:** Enable to delete the existing routing profile.

#### **Right-Click Options:**

#### Maintain Over Due Notification

Allows for the setup/maintenance of the Overdue Notifications items for a Routing Profile. Overdue Notification is an Image Management

feature whereby supervisors can be notified when routed items remain in users' workbaskets longer than expected.

Overdue Notification Maintenance										
Odose 1 dose 1 dose dose dose dose dose dose dose dose										
Route	Route Member System/Doc Type Overdue After A Period Of Frequency Supervisor Notify Supervisor Notify Member Route To Profile									
F-PO NONTY "ALL 002 D LEN Y N										

Overdue Notification Main		
	enance	🔗 Submit
Route Name:	CF-PO	
Route Member:	MONTY	
System/Doc Type:	*ALL	
Overdue After A Period Of:	002	
Days/Hours/Minutes:	D	~
Supervisor:	LEN	~
Notify Supervisor:	Υ	~
Notify Member:	N	~
Routing To Profile:		~
Delete Record:		

Route Name:	The routing profile name will automatically populate based on the current routing profile.
Route Member:	he user id for the person that will be notified in the event of an overdue entry.
System/Doc Type:	The system id or document type to trigger the overdue notification. *ALL can be used to include all systems and document types.
Overdue After A Period of:	Number of days/hours/minutes to trigger an overdue notification.
Days/Hours/ Minutes:	The interval used to calcuate the Overdue After A Period value.
Supervisor:	The user id of the supervisor that will be notified of the overdue entry, if Notify Supervisor = Y.
Notify Supervisor:	Y to notify the supervisor identified in the Supervisor field. N to not send a notifcation to the supervisor.
Notify Member:	Y to notify the member listed in the Route Member field. N to not send a notification to the member.
Routing To Profile:	The name of the routing profile to send the entry to in the case of an overdue situation.
Delete Record:	Delete the overdue notification that is currently displayed.

#### Maintain Routing Rules

Allows for the setup/maintenance of any Rules-Based Routing items for a Routing Profile.

Routing Rules Maintenance

Occee Add Double-click an existing record to perform maintenance.										
Route	te Order Index Greated Than Or Equal To Less Than Or Equal To Re-Route To Profile Change To Sequence									
CF-PO	000	04	201.00	1000.00	LENJP	000				
CF-PO	001	04	1001.01	5000.00	AP LARGE AMOUNT	000				

Options Processing		>
Routing Rules Maintenance	e	
🚫 Close		🕑 Submit
Route Name:	CF-PO	
Order:	000	
Change Order:	×	
Index:	04	
Greater Than Or Equal To:	201.00	
Less Than Or Equal To:	1000.00	
Re-Route To Profile:	LENJP	~
Change Sequence:	000	~
Delete Record:		

Route Name:	The routing profile name will automatically populate based on the current routing profile.
Order:	The numeric order.
Change Order:	Move, Move Before, Move After then specify the numeric number you want it in.
Index:	Enter the Index number that will relate to the data being compared.
Greater Than Or Equal To:	Enter the value to be compared.
Less Than Or Equal To:	Enter the value to be compared.
Re-Route To Profile:	The name of the profile to re-route the document to.
Change Sequence:	The numeric value.
Delete Record:	Delete the routing rule currently displayed.

#### Maintain Approvial Rules

Allows for the setup/maintenance of any Approval Rules items for a Routing Profile.

Approval Rules Maintenance												
🕲 dose 🗄 Ade Double-click an existing record to perform maintenance.												
Route	Doc Type	Auto Delete	Approval Action	Approval Auto Delete	Approval Change PTY	Approval Force Notes	Approval Copy/Move	Disapproval Action	Disapproval Auto Delete	Disapproval Change P	Disapproval Force Notes	Disapproval Copy/Move
CF-APLOW			APAPPROV	Y		N	M	APPROBLEM	Y		N	M

Options Processing	>>
Approval Rules Maintenanc	e
🚫 Close	🔗 Submit
Route Name:	CF-APLOW
Document Type:	
— Approval —	
Action To Take:	APAPPROV
Auto Delete:	Y
Change PTY:	<b>*</b>
Force Notes:	N Y
Copy/Move:	M
- Disapproval	
Action To Take:	APPROBLEM
Auto Delete:	Y
Change PTY:	<b>v</b>
Force Notes:	N Y
Copy/Move:	M
Delete Record:	

Route Name:	The routing profile name will automatically populate based on the current routing profile.
Document Type:	OPTIONAL document type associated with this approval rule for the current route.

### Approval

Action To Take:	<ul> <li>The user can select from the following available options:</li> <li>1. A routing profile to automatically route to.</li> <li>2. A routing rule profile to automatically route to.</li> <li>3. *PROMPT = Prompt for action to take when approved.</li> <li>4. *NONE = Take no special action.</li> </ul>	
Auto Delete:	Y automatically deletes the routed image from the queue, N does not.	
Change PTY:	Provides the ability to change the priority code for the routed image.	
Force Notes:	Y forces the user to add a note, N does not force notes entry, A automatically logs an approved/disapproved note.	

**Copy/Move:** C to copy the entry, M to move the entry.

#### Disapproval

Action To Take:	<ul> <li>The user can select from the following available options:</li> <li>1. A routing profile to automatically route to.</li> <li>2. A routing rule profile to automatically route to.</li> <li>3. *PROMPT = Prompt for action to take when disapproved.</li> <li>4. *NONE = Take no special action.</li> </ul>		
Auto Delete:	Y automatically deletes the routed image from the queue, N does not.		
Change PTY:	Provides the ability to change the priority code for the routed image.		
Force Notes:	Y forces the user to add a note, N does not force notes entry, A automatically logs an approved/disapproved note.		
Copy/Move:	C to copy the entry, M to move the entry.		

Delete Record: Enable to delete the approval rule.

#### Delete Route Profile And All Related Records

Delete Route Profile	Records	
Route Name:	MC	
- This Will Delete All F	oute Profile References	
Delete All:		
		🗶 Delete Now

**Route Name:** The name of the routing profile to be deleted.

#### This Will Delete All Route Profile References

**Delete All:** Enable to confirm the deletion of the routing profile.

## 6.3. Custom Menus

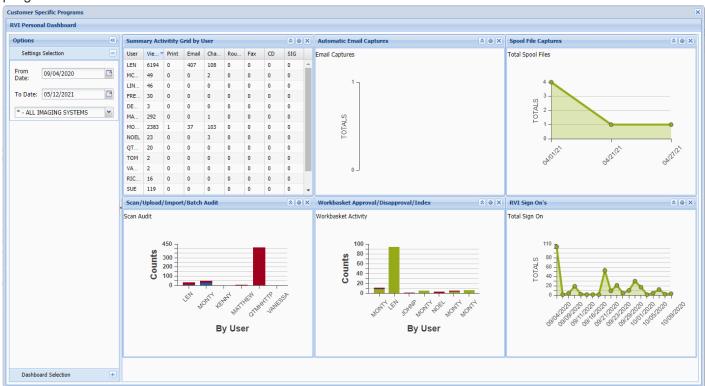
Access menus and programs specific to your organization using **Custom Menus**.



When **Custom Menus** is selected, the *Customer Specific Programs* window opens with a list of available programs based on user level security. (See <u>Setup Custom Menus</u> for details.)

Customer Specific Programs	×
🚫 Close	
Custom Menu Option	Program Name
Audit Dashboard	http://12.27.233.218/internet/rvi/RVIAUDIT/auditportal/index.html

This example shows the custom menu option **Audit Dashboard** which calls the RVI Personal Dashboard program.



The dashboard can be personalized using the *Dashboard Selection* menu to include only those windows you want to monitor.

Options		<b>«</b>
Settings Selection		+
Dashboard Select	tion	Ξ
<ul> <li>Graph Selections –</li> </ul>		
Detail Grid:	1	
Scan Graph:	V	
Email Graph:	1	
Workflow Approval:	<b>V</b>	
Spool File Graph:	1	
Signon Graph:	<b>v</b>	

# 6.3.1. Setup Custom Menus

When a custom 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.)

		1000 1000		
	oyright RVI			
X=Maintain Real Vision Custom Menu Maintenance	RYMNU	PMD/SFLRCD		
C=Copy Menu Heading:				
M=Move Copy/Move	0	<b>F</b> = - 1 = -12		
<u>X Seq To Seq Option Description</u>	<u>Secured?</u>	<u>Enabled?</u>		
X 950 Audit Dashboard	Ť	r		
Buit an "X" next by				
Put an X next to an existing record OR create a new record using $F9 = a$	Add Option			
F6 =Del User F10 =Test User F11 =Dup	lser			
	t Enter =Co	ontinue		
MA D A		15/012		

Real Vision Customer Specific Maintenance Screen(c)Copyright RVI,1999UPDATERVMNUPMD/RECUPD
Option #: <u>950</u> Menu Option Text: <u>Audit Dashboard</u> User Security Exists. Option Enabled?: Y_ (Y/N)
Setting Enabled To N Will Remove Option From All Users. Press F5 If Security By User Is Desired. Removing Users Will Remove Security.
Command To Execute (F4 To Prompt) (Enter *HEADING if this is a heading line): <u>CALL_LINK_parm('http://12.27.233.218/internet/rvi/RVIAUDIT/auditportal/index.htm</u> <u>1')</u>
F3 =Exit F5 =Maintain User Security F23 =Delete 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.



The setup is complete!

Users specified in Step 6 will see the option when they select Menu / Custom Menus from One Look.

V N	lenu 👻
٢	WorkBasket
≫	Maintenance
	Custom Menus
c	Change Password
0	Sign Off

O Close		
Custom Menu Option	Program Name	
Audit Dashboard	http://12.27.233.218/internet/rvi/RVIAUDIT/auditportal/index.html	

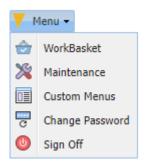
Double-click the line item to execute the menu.

In this example, we are accessing the RVI Personal Dashboard.



### 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 except for # and &. Passwords should not begin with numbers or special characters. Whitespace character can not begin or end a password.)

Change Password	×
Sign In Required after Change Enter Password:	
Re-Enter Password:	
	🕑 Submit 🚫 Cancel

# 6.5. Sign Off

Select Menu, Sign Off then close the browser.

4	1enu 👻
٢	WorkBasket
2	Maintenance
	Custom Menus
c	Change Password
0	Sign Off

# 7. IMAGE INQUIRY TOOLBOX

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

#### Help & Settings



#### Navigation & Appearance

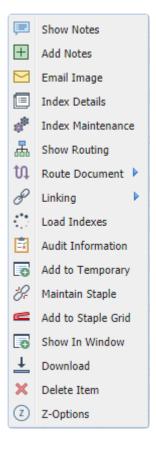
🛛 🖣 Page 0 of 0 🕨 🕅 🧬 No data to disp	🗸 🔀 Retrieve Request 🛛 Display Checked 🔲 Display Options 🗸
---------------------------------------	--

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

$\Diamond$	Back
, III	Notes 👻
:=	Details
¢	Maintenance
3	Email
5	Routing 👻
2	Audit Information
,	Spool Search
-	Download
]	Add to Temporary
3	Display Temp Grid
2	Retrieve Request
P	Attach Document

#### B Extract Pages

#### Subfile 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.

Dne Look					
Image Inquiry			«	Awaiting System Selection	<b>0</b> ? ¢
Total Systems:			^	14 4 Page 0 of 0 🕨 🕅 🖑 No data to display	isplay Checked 📃 Display Option Settin
System 🔺	System Name				
A	AP WORKFLOW SYSTEM	~			
В	BANKING DDA SYSTEM			*** Ready to Search ***	
с	COURT SYSTEM				

To access the session settings:

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

One Look				
Image Inqu	liry	~	Awaiting System Selection	0?2
Total Syste	ms: 38	~	A Page 0 of 0 D R No data to display	Display Checked Display Options •
System 📥	System Name			
Α	AP WORKFLOW SY			
в	BANKING DDA SYSTEM		*** Re	ady to Search ***
с	COURT SYSTEM			
D	AP SYSTEM			
E	AR SYSTEM			
F	BANKING LOAN SYSTEM			
G	ARKANSAS STATE TRE			
н	MEDICAL SYSTEM			
I	INSURANCE SYSTEM			
J	NET DATA CASE IMAG			
к	BUNZEL TEST IMAGE			
L	PERSONAL PROPERTY			
м	MASTER IMAGE SYSTEM			
0	ACCUFUND ACCOUNT			
Р	ACCUFUND A/R SYSTE			
Q	ACCUFUND REQUISIT			
R	SIGNATURE DOCUME	$\sim$	(PDF) Device Id:\$00105335 User Id: M	CKENZY © Real Vison Software. All Rights Reserved.
c	ACCUEUND BURCHAS			,

2. The session settings window will display.

Session Settings				×
© Real Vison Software. All Rights Reserved.				Version 6.26.19
Grid Type	Regular	Tabbed	Tree	
Remove Date Formatting	On/Off			
Remove Numeric Formatting	On/Off			
Combine PDF	On/Off			
RVI to Viewer	🔲 On/Off			
Polling	🔲 On/Off			
Hide West Region after Search	On/Off			
Display AS400 Spool Format	On/Off			
Editable Display Fields	On/Off			
Name Downloaded Files	On/Off			
Contains on Search Fields	On/Off			
Show Index Grid During Display	On/Off			
Items Per Page	500		~	
'Temporary Grid' and 'Show in Window' initial window size:	Normal		~	
📀 Clear Cookies				💾 Save Settings

#### Available Options:

#### 1. Grid Type

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

#### • Regular

Displays the index list based on create date.

Page         1         Image         Displaying           gs         VENDOR         X           1909         1909         1909           1909         1909         1909           1909         1909         1909	ving 1 - 4 of 4	DOCUMENT TYPE
gs x x 1909 1909 1909 1909	x 12/21/2011 12/22/2011 12/22/2011	HOUSE PHOTOGRAPH FINANCIAL STATEMENT LOAN APPLICATION
1909 1909 1909	12/21/2011 12/22/2011 12/22/2011	HOUSE PHOTOGRAPH FINANCIAL STATEMENT LOAN APPLICATION
1909 1909	12/22/2011 12/22/2011	FINANCIAL STATEMENT LOAN APPLICATION
1909	12/22/2011	LOAN APPLICATION
1909	12/25/2011	INCOME XLS

#### • Tabbed

Displays the index list based on document tabs.

Image Inquiry 🔍	F-BANKING LOAN	SYSTEM		3 ? ¢
Index Search Venu -	Page 1	of 1 🕨 🕅 🍣 Displaying 1	L - 4 of 4 Dis	splay Checked 🗧 Display Options 🗸
F-BANKING LOAN SYSTEM Grange System	Flags	VENDOR	DATE	DOCUMENT TYPE
VENDOR	i laga	×	×	×
DATE	TAB: COLLATER	AL		
DOCUMENT TYPE	N	1909	12/21/2011	HOUSE PHOTOGRAPH
From Date 🖸 To Date 🖻	TAB: FINANCIAL	INFORMATION		
		1909	12/22/2011	FINANCIAL STATEMENT
🔾 Search 🔄 Functions 🗸 🖉 Clear		1909	12/25/2011	INCOME XLS
	🗆 TAB: LOAN INFO	RMATION		
	N N	1909	12/22/2011	LOAN APPLICATION
	(PDF)	Device Id:\$00105970 User Id:	MCKENZY @ Res	al Vison Software. All Rights Reserved.
	(, , , , ,		(Charles Control of the	a rison soremaner var Rights Reserved.

#### • Tree

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

mage Inquiry 🔍	F-BANKING LOAN SYST	EM 0?0
Index Search Venu -		🕃 Display Checked 🛛 🗮 Display Options 🗸
F-BANKING LOAN SYSTEM 🔲 Change System	Flags	VENDOR
VENDOR DATE DOCUMENT TYPE From Date To Date Search Functions Clear		Image: Second state sta
	(PDF)	Device Id:\$00105970 User Id: MCKENZY © Real Vison Software. All Rights Reserved.

#### 2. Remove Date Formatting

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

#### 3. Remove Numeric Formatting

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

#### 4. Combine PDF

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

mage Inquiry 🔍		
5	K Back	NAME AND ADDRESS OF SOMEONE WHO CAN CONTACT YOU AT ALL TIMES, TO VERIFY ANY AND ALL CHINGES (TO YOUR ACCOUNTS) THAT THIS INSTITUTION WAS RECEIVED ON YOUR ODHUF.
		PridME 8
Index Search 🗸 Menu 🗸	Email Email	VERIFICATION OF IDENTIFICATION: 'Form of identification provided: *Identification issued by: Delv GetS (UESSE) *Expiration Date:* Issue Date:*
		"dentification Number: "dentification verified through:
	Download	Name and Address of someone who will always know your location:
F-BANKING LOAN SYSTEM 📃 Change System	E Download	Gov. Usts Additional Documentation Attached
_		SECTION B- INFORMATION REGARDING JOINT APPLICANT OR OTHER PARTY Complete only if: for joint credit, for individual credit relying on income or assets from
VENDOR		cher sources, or applicant is married and resides in a community property state.      FUEL WWG (Last, Fee, Weak)     RETIRE (Last, Fee, Weak)     RETIRE (Last, Fee, Weak)
VENDOR		ATTEN AND CONTRACT CO
		RELATIONSHIP TO APPLICANT (/ Any) PRESENT/ADDRESS (Street, City, State & Zo) HINT COM INTERNATION PECASE HOW LONG AT
DATE		WIFE SAVE
		PRESENT EXPLOYER (Screwn Viene & Addres) N PA- HOW COM WITH (PRESENT   YOUR POSITION OR TITLE HOW COM WITH (PRESENT   YOUR POSITION OR TITLE NUMBE OF SUPERVISOR NUMBE OF SU
DOCUMENT TYPE		EMPLOYERS
		PREVICUS EMPLOYER (Sumpary Name & Addmss) HOW CONS INTO PREVICUS EMPLOYER (Sumpary Name & Addmss) EMPLOYER
From Date 🖪 To Date		YOUR PRESENT GROSS SALARY OR COMMISSION YOUR PRESENT NET SALARY OR COMMISSION NO. DEPENDENTS AGES OF DEPENDENTS
		\$ PER \$ PER
•		Aimony, child support, or uspusile maintenance income need not be revealed if you do not win to have it considered as a basis for repaying this obligation.  Minony, child support, separate naintenance inconverturates: Court Onder Written Agreement Onit Understanding
🔾 Search 🛛 🖄 Functions 🕶 🛛 🖉 Clear 📝		Newsy Cell System Selection Relevance Hailer Court Classer   Verson Agreement   Child Courtsananceg
• • •		s PER EDUCATION CONTRACTOR
		b may harves biol to the section bioly to be well and biological to a section biological biological to a section biological to
		Undersig Account Notes
		OFFICE Earlings Access Aurabit
		NAME AND ADDREES OF MEAREUT RELATIVE NOT LIVING WITH YOU RELATIONSHIP TELEPHONE HD. (NAME AND COM)
		VERIFICATION OF INFORMATION OF MILITARY PERSONNEL: WHE ARE ADDRESS OF DEREVAL WHO CAN CONTACT YOU AT ALL THER, TO VER FY ANY AND ALL CHANGES (TO YOUR ADCOUNTS, THAT THIS WETTUTTON HAS RECEIVED ON YOUR ADMLT.
		PICKE 4
		VERIFICATION OF IDENTIFICATION: * Form of Identification provided:
		*ldentification issued by: * Expiration Data: *latue Date:
		*Identification Number: *Identification verified through:
		Name and Address of someone who will always know your location:
		SECTION C - MARTINE STOREMENT IN COMPANY IN THE COMPANY IN THE COMPANY AND A COMPANY A
		as a basis for recommend of the conditionaution of a non-construction of an appearance of the conditionaution of t
		APPLICANT Preset Unmerted (including single, divorced, and victored)
		DTHER RARTY Natried Unmarried (including single, divorsed, and videwed)
		SECTION G: CREDIT DISCLOSURE FOR INSURANCE (applicant copy)
	Combined Image	This notice is provided to you relating to information that is or may be offered, solicited of sold in connection with your application for credit torough The Evanceline Bank & Trust Company:

#### 5. RVI to Viewer

Forces the display of images into the RVI PC Viewer.

#### **RVI PC Viewer** 9.1.xx or higher must be installed locally on the pc.

#### 6. Polling

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

#### 7. Polling Interval

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

#### 8. 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.

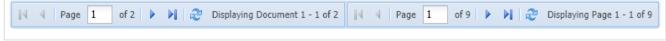
	e Index Searc	h panel will minimi anel click the doubl	ze. e arrows.		I.	Retrieve Request 🛛 Displa	y Checked EDisplay Options
	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
Flags		3	3	3	3	3	3
	241780	01/02/2018	J JARRED	T JARRED	с	MONTAGUE	DRAFT
N	241780	03/15/2017	J JARRED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

#### 9. Display AS400 Spool Format

Check/Uncheck this option to enable/disable the feature to bring up large spool files quicker by breaking down spool files by document/page. If several spool files are selected and Display AS400

Spool Format is enabled, you will see 2 paging toolbars at the bottom of the screen. The left toolbar controls which document is being displayed. The right toolbar controls which page within the

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



#### 10. Editable Display Fields

Enabling this feature allows users with a custom interface to temporarily "edit" index fields after the initial inquiry.

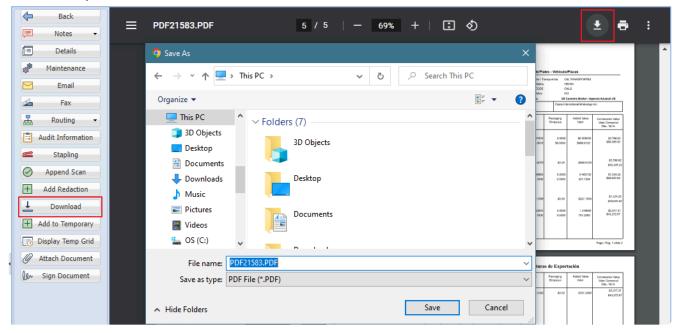
Below is an example of a custom interface from the IBMi to OneLook. The user selects F5 to inquire. OneLook populates with the index(es) passed from the interface. In this case EMPLOYEE NAME = 1. Since Enable Display Fields is *enabled*, the user can edit EMPLOYEE NAME. If Enable Display Fields is *disabled*, the user can not edit EMPLOYEE NAME. By editing the index, the user can perform additional searches and use the **Functions** drop down options Enables.

Demo Insurance Application System(c) Copuright RVI 1992Policy: 1John SmithSx M Dob 12/31/68Vital InformationClaims Filed: YModal PremiumsApplication Date4/30/11Day S F ModeM 231.330 722.04Policy Issue Date5/01/1101 7 I 01S 1416.30A 2777.041/04/11Last Paid Date5/01/11NFORest.Paid-to Date5/01/12Last Change: 7/25/11Next Change: 11/11Policy Fee Amount367.00Received: YState: Residence 19Application 19Parish/County1900Reinsurance: Type A Company C2Special Billing1212State: Type A Company C2
Vital InformationClaims Filed: YYModal PremiumsApplication Date4/30/11Day S F ModeM231.330722.04BL. Dt.Policy Issue Date5/01/1101 7 I01S1416.30A2777.041/04/11Last Paid Date5/01/11NFORest.Paid-to Date5/01/12Last Change:7/25/11Next Change:11/11Policy Fee Amount367.00Received:YState: Residence19Application19Parish/County1900Reinsurance:Type A Company C2Company C2Company C2Company C2
Application Date       4/30/11       Day S F Mode       M       231.33       0       722.04       Bl. Dt.         Policy Issue Date       5/01/11       01 7 I 01       S       1416.30       A       2777.04       1/04/11         Last Paid Date       5/01/11       NFO       Rest.       Paid-to Date       5/01/12       Last Change:       7/25/11       Next Change:       11/11         Policy Fee Amount       367.00       Received: Y       State: Residence 19       Application 19         Parish/County       1900       Reinsurance: Type A Company C2
Policy Issue Date5/01/1101 7 I01 S1416.30À 2777.041/04/11Last Paid Date5/01/11NFORest.Paid-to Date5/01/12Last Change:7/25/11Next Change:11/11Policy Fee Amount367.00Received:YState: Residence19Application19Parish/County1900Reinsurance:Type ACompanyC2
Last Paid Date 5/01/11 NFO Rest. Paid-to Date 5/01/12 Last Change: 7/25/11 Next Change: 11/11 Policy Fee Amount 367.00 Received: Y State: Residence 19 Application 19 Parish/County 1900 Reinsurance: Type A Company C2
Paid-to Date 5/01/12 Last Change: 7/25/11 Next Change: 11/11 Policy Fee Amount 367.00 Received: Y State: Residence 19 Application 19 Parish/County 1900 Reinsurance: Type A Company C2
Policy Fee Amount 367.00 Received: Y State: Residence 19 Application 19 Parish/County 1900 Reinsurance: Type A Company C2
Parish/County 1900 Reinsurance: Type A Company C2
Special Billing 12
Uning Tung F _ F1F = Cha To Tung S
Using Type F   F15 = Chg To Type S F3 =Exit F5 =Inquiry  F9 =Scan  F10 =Upload  F11 =Display Policy F12 =Previous
F3 =Exit F5 =Inquiry F9 =Scan F10 =Upload F11 =Display Policy F12 =Previous
MA D 01/001

Image Inquiry (Host-Socket Connected)	I - I	NGRISH LLC		Editable Display Fiel	ds is DISABLED 💿 ? 🖻
Index Search V Menu -	14	Page 1	of 1 🕨 🕅 ಿ Displa	aying 1 - 76 of 76 🛛 🗹 Disp	olay Checked 🔲 Display Options 🗸
I - INGRISH LLC			EMPLOYEE NAME	DATE	DOCUMENT TYPE
EMPLOYEE NAME: 1		Flags	×	×	×
DATE		Ν	1	01/01/2012	POLICY
			1	01/17/2012	ACCIDENT REPORT
DOCUMENT TYPE			1	01/17/2012	DAMAGE CLAIM
From Date 🖪 To Date 🖪			1	01/18/2012	CHECK
Show Deleted Records			1	01/18/2012	LETTER
			1	01/18/2012	WRECK
Search 😥 Functions 🔹 🚫 Clear			1	01/21/2012	DRIVERS LICENSE
			•	00/15/0010	
Image Inquiry (Host-Socket Connected) «	I - I	NGRISH LLC		<ul> <li>Editable Display Field</li> </ul>	elds is ENABLED 🔍 🔍
Index Search Venu -		Page 1	of 1 👘 🕅 🍣 Displa	ıying 1 - 76 of 76 🛛 🗹 Disp	lay Checked 🔲 Display Options 🕶
I - INGRISH LLC		E.a.s	EMPLOYEE NAME	DATE	DOCUMENT TYPE
1		Flags	×	×	×
DATE		Ν	1	01/01/2012	POLICY
DOCUMENT TYPE			1	01/17/2012	ACCIDENT REPORT
			1	01/17/2012	DAMAGE CLAIM
From Date 🖪 To Date 🖪			1	01/18/2012	CHECK
Show Deleted Records			1	01/18/2012	LETTER
			1	01/18/2012	WRECK
🔎 Search 🏻 🛱 Functions 🕶 🖉 Clear			1	01/21/2012	DRIVERS LICENSE

#### 11. Name Downloaded Files

Allows for the renaming of downloaded files. A *Save As* dialog box will open when the user clicks the Download option.



Alternate Save As dialog that will display is the **Download** button is used rather than the download arrow.

Save As	5		×
Would	you like to ch	ange this file n	ame?
	ОК	Cancel	

#### 12. Contains on Search Fields

Allows wildcard search using asterick for a string containing the specified value. For example, users can search for **\*237**\*

The system will find all matches for Index 1 containing 237 such as 012376.

Image Inquiry (Host-Socket Connected)	Z-C	OURT DOCU	MENTS AND EXHIBITS						
Index Search Venu -	N	🕅 🖣 Page 1 of 1 🕨 🕅 🤔 Displaying 1 - 7							
Z-COURT DOCUMENTS AND EXHIBITS The Change System		Flags	CASE NUMBER	FILING DATE					
*237*		riags							
FILING DATE			012376						
PLAINTIFF			012376	Р					
			012376	P1					
DEFENDANT			012376	P2					
CASE TYPE			012376	P3					
COURT/JUDGE			012376	06012011					
			012376	2					
DOCUMENT TYPE									
From Date 🖸 To Date 🖪									
Show Deleted Records									

#### 13. Show Index Grid During Display

Keeps the subfile list of results open while displaying an image. Allows the user to double-click on additional documents as needed without backing out of the display window.

	»	Z-C	OURT	DOCUMEN	ITS AND EX	HIBITS				@?¢	4	Back		± a :
,	Image Inquiry (Host-Socket Connected)	14		Page 1	of 1		Displaying	1 - 2 of 2	🗾 Display	y Checked	Ţ	Notes 👻		± + ;
			-	CASE N	FILING	PLAINT	DEFEN	CASE T	COURT	DOCU		Details		
	iv (		F								101 <sup>101</sup>	Maintenance		
	s, I		Ν	011822	01/18/	L OWNS	P LYLE	м	O/003	MISC		Email		<ol> <li>Desamentation of the cost of any depose, actual tables, shallh insurance for the oblig of tables.</li> </ol>
	Soc			012376	060120	S FRYE	O JONES	м	D JOH			Fax		<ul> <li>Downentation of any other appenas or income the party may with the Court to consider</li> </ul>
	Â										品	Routing 🔹		incluing frace in support of any proposed deviations from the utility support public set in support of in-columity comparisons or unterresplayment, or in support of ecosistie community data the public value parajos.
											B /	Audit Information		<ol> <li>If appased support is to be an issue in the case, the parties shall each hirty with them on Altidade is which they bit all of them monthly income, doculators butwation and net income.</li> </ol>
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#### 14. Items Per Page

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

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

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

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

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

One Look												
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## 7.2. Navigation & Appearance

To watch a video on this topic CLICK HERE

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

	II Page 0 of 0 ▷ ▷I ② No data to displ	y 🕄 Retrieve Request 💟 Display Checked 🛅 Display Options 🗸
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**Retrieve Request:** Manual information retrieval through a **CUSTOM INTERFACE** with the IBMi green screen used for One Look functions (View, Scan, Import, Upload) when polling or sockets is not used. Using the IBMi green screen, the user will navigate to and execute the **CUSTOM** function then press the Retrieve Request button from One Look to complete the request.

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

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

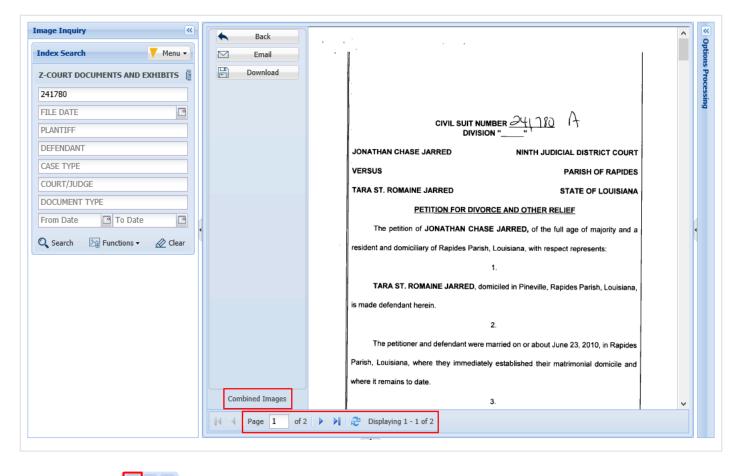
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**Display Checked:** View all documents selected with a check mark.

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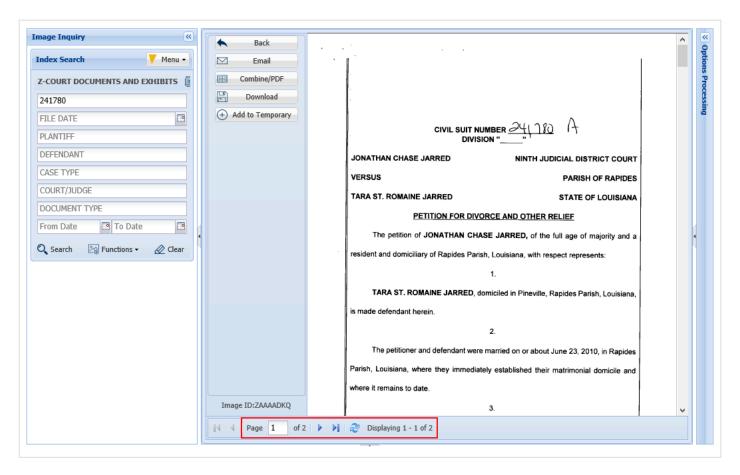
Under Settings **Output**, when <u>Combine PDF</u> is Enabled – Use the scroll bar to move between TIF and JPG documents. Use the arrows to move between OEM documents.

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

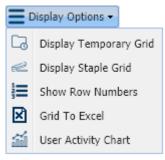


Under Settings [2] when <u>Combine PDF</u> is Disabled – Use arrows to move to the next document.

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



#### **Display Options**



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

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

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

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COURT/JUDGE		241780	07/24/2018	J JARRED	T JARRED	С	BIRD	PICTURE
		241780	07/24/2018	J JARRED	T JARRED	С	MONTOGUE	
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• Hide Row: Hides the numerical row number next to each record.

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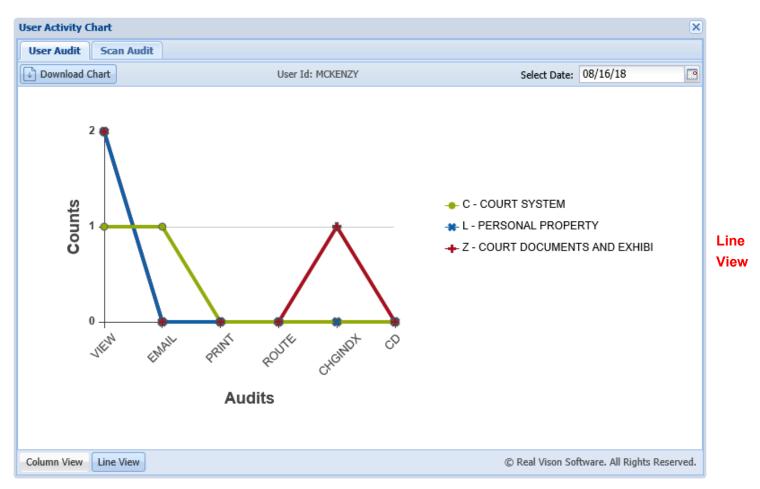
• **Grid to Excel:** Display a list of the One Look sub file indexes in Excel. Also, used in <u>spool file search</u> to display spool file reports in Excel.

	Page 1 of 1	🕨 🕅 🤔 Display	ing 1 - 54 of 54	17 1	Retrieve Request	Display Checked	Display Op	otions - Option	
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• User Activity Chart: Includes User Audit and Scan Audit tabs. The User Audit is a graphical representation of the user's activity by System Code including View, Email, Print, Route, Change Index, and CD activity based on the selected date. The Scan Audit is a graphical representation of the user's scan activity including Direct Scan and manual Upload Scan activity based on the selected date.

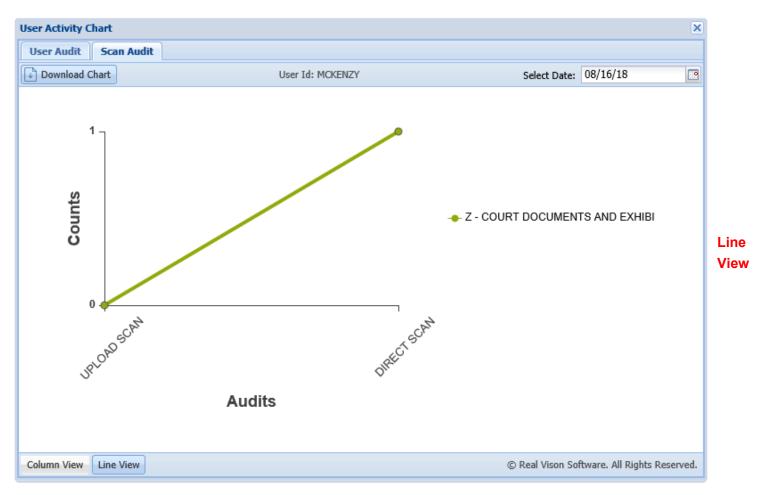


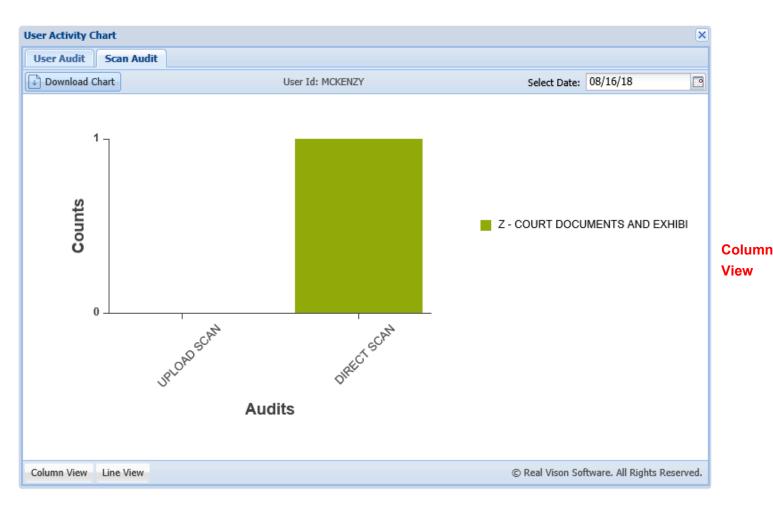
### User Audit Tab:





### Scan Audit Tab:

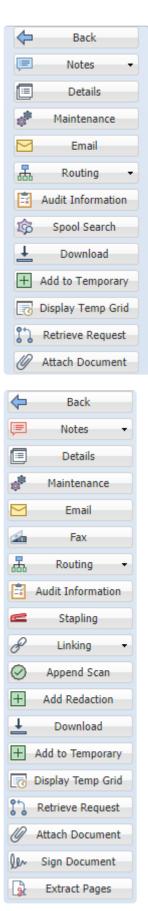




# 7.3. Display Options Ribbon

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

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



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.

mage Inquiry «	K Back	ι.	^
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Z-COURT DOCUMENTS AND EXHIBITS 🗐 Change System	Details     Maintenance	II. That your petitioner desires to amend his Petition for Divorce and Other Relief by	
241780 FILE DATE PLANTIFF DEFENDANT CASE TYPE COURT/JUDGE	Email Control	adding paragraph 19 to read as follow: "19. The defendant has recently exhibited volatile and erratic behavior and mood swings and your petitioner shows that it would be in the best interest of the children for the Court to order a psychological evaluation of both parties by a mental health professional selected by the Court, and that this would be in the best interest of the children." WHEREFORE, YOUR PETITIONER PRAYS:	
DOCUMENT TYPE From Date  ☐ To Date  ④ Cear Cear	(↔) Add to Temporary	<ol> <li>That this amended pleading be deemed good and sufficient and be ordered filed;</li> <li>That the prayer of the petitioner's original Petition for Divorce and Other Relief is reiterated and reafitmed; some and except as may be inconsistent herewith;</li> <li>That all allegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and</li> <li>For all necessary orders and decrees.</li> </ol>	
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**Notes:** Add notes or view existing notes for the document being displayed. When notes exist, the Notes drop down icon will be **red**. (*Show Notes will only appear if the document already has notes*.)

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	A. For all necessary orders and decrees.	~	

	»
Add Notes	
🕗 Submit 🛛 🖧 Check Out Document 📿	2 Cancel

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



Once the note is complete, select

### Once a Note is Added:

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

🖹 Notes	•	
Show Notes		
Add Notes		

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

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PLANTIFF		NRL	123457	02/	R HENRY	W HENRY	Α	DAGGET	GARNISHME	IMAGE	2012/05/08	001
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Details: Shows the details (*filename, path, page count, create date*) of the document being displayed.

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

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

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

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M DOUGLAS	
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SUPPORT@REALVISIONSOFTWARE.COM	
	🖅 Send Email 🛛 🖉 Cancel

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

**Fax:** Fax the document being viewed. Customer must have a fax adapter installed. Contact <u>Real Vision</u> <u>Software</u> support for details on faxing requirements when using One Look.

**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.*)

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			would be in the best interest of the children for the Court to		
			order a psychological evaluation of both parties by a mental		
			health professional selected by the Court, and that this would		
			be in the best interest of the children."		
			WHEREFORE, YOUR PETITIONER PRAYS:		
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### After the document is routed, the option Show Routing will appear under the Routing drop down list.

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	9	Retrieve Request	"19. The defendant has recently exhibited volatile and erratic
			behavior and mood swings and your petitioner shows that it
			would be in the best interest of the children for the Court to
			order a psychological evaluation of both parties by a mental health professional selected by the Court, and that this would
			be in the best interest of the children."
			WHEREFORE, YOUR PETITIONER PRAYS:
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**Audit Information:** Provides the ability to view all activity for the document being viewed. *Available filters: View, Print, Email, Change, Route, Fax, CD, Signature* 

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

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

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

Stapling

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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.

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**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.

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

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After displaying the image:

Linking

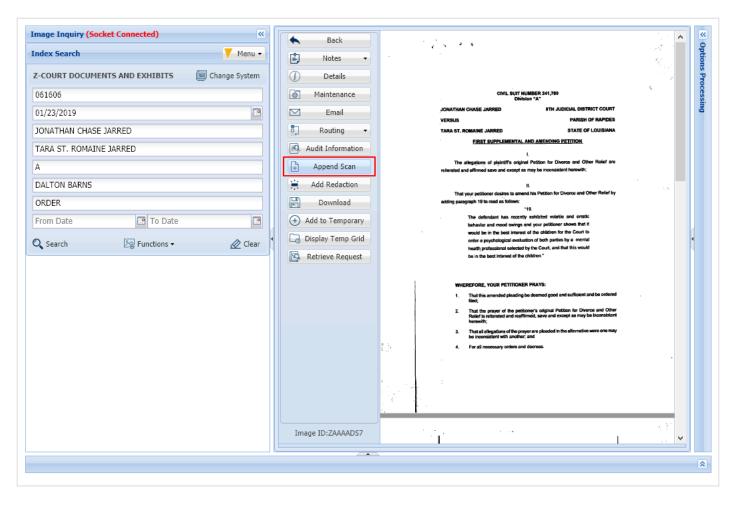
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button will be available.

• 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.

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



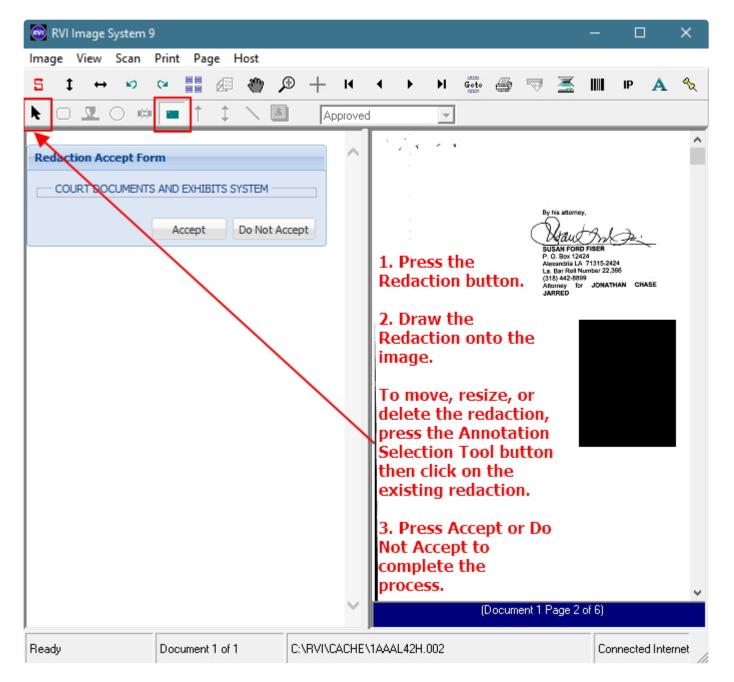
Add Redaction: Redact an area of an image using an opaque highlighter.

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.

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



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

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

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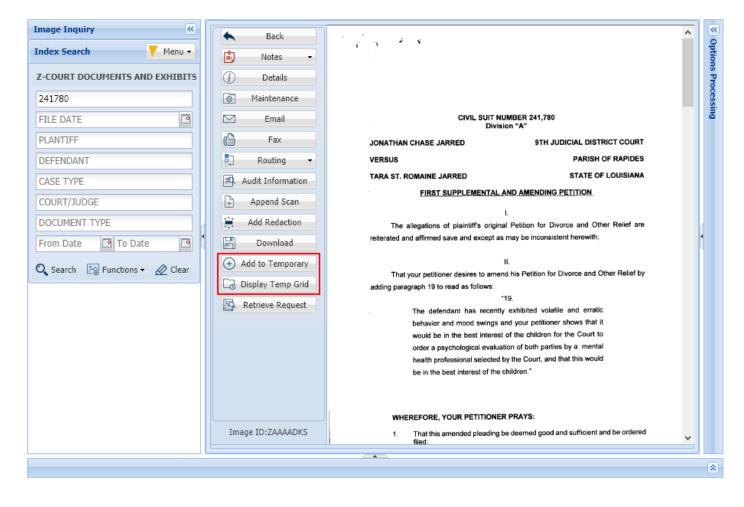
**Download:** Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.

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

🗔 Display Temp Grid

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.

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7 С	PETITION	241781	04/22/2017	E ZEND	H POTTER	С	MONTOGUE
(MASTER IMAGE SYST	(DOCUMENT TYPE)	(ACCOUNT)	(DATE)	(NOT USED)	(NOT USED)	(NOT USED)	(NOT USED)
M	DRIVERS LICENSE	00005	01/05/2005				
COURT DOCUMENTS	(DOCUMENT TYPE)	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
Z	FIRST SUPPLEMENTAL	241780	03/15/2017	J JARRED	T JARRED	С	MONTOGUE
emporary Grid o	ntion allows view	vina documents	from multiple	Systems at the s	ame time.		

**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.

**Attach Document:** Choose a file(s) to attach to the existing document on display. Once a file is attached, it will be stapled to the original document and displayed automatically when the original is viewed. The user

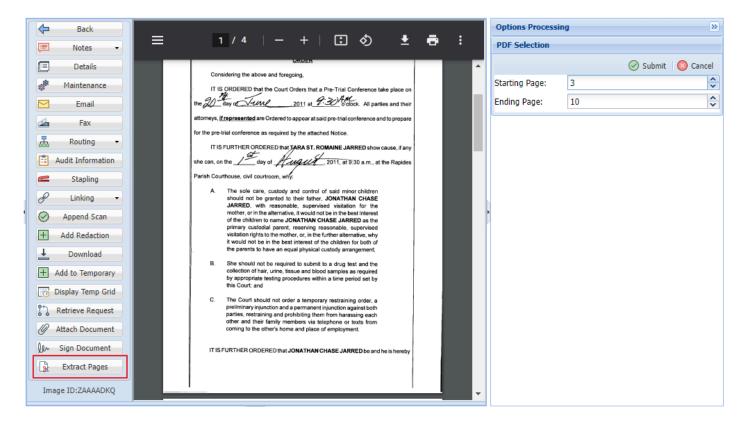
- Charles

can maintain the stapled documents by clicking the Stapling button	in the display
options .	

Attach Document	×
Choose file:	Browse
	Upload

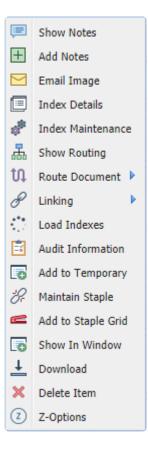
**Sign Document:** Apply a signature or finger print to a document. Customer must have a signature pad installed. Contact <u>Real Vision Software</u> support for requirements.

**Extract Pages:** Select the desired PDF page range to be viewed.



# 7.4. Subfile List & Right Click Menu

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



If multiple records are flagged, **Maintain Selected**, **Route Document**, **Add to Temporary**, **Add to Staple Grid**, **Show In Window**, and **Delete Flagged Items** will be the only available options. (Available options are controlled via <u>Option Security</u> on the server.)

2	Maintain Selected
t	Route Document
6	Add to Temporary
2	Add to Staple Grid
6	Show In Window
×	Delete Flagged Items

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

Image I	Inquiry		~	0	Z-0	OURT	DOCUMENT	S AND	EXHIBITS						@ ? ¢
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Z-COUF	RT DOCUMENTS	AND EXHIBITS	🔲 Change System			Elses.	CASE #	F	ILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT	ТҮРЕ
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	/JUDGE							6	Index Deta						
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					/	·		Ø	Audit Infor	nation					
				/	·				Add to Tem	porary					
Notes Li	isting		-	•				2	Add to Stap	ole Grid					
🚫 Clos	se	Right click iter	m for more options.						Show In W	indow					
Flags	User		Note						Download			Entry Date		Close Dat	e
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From the Notes Listing, users can Close or Delete notes by right clicking a record.

Notes Li	sting ●	em for more of	ptions.		
Flags	User		Note	Entry Date	Close Date
0	MCKENZY		IOSE NOTE	010418	000000

button to

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

🖧 Check Out Document When a user is adding a note, the record can be checked out using the

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

mage Inquiry		<ul> <li></li> </ul>	8 Z	-COUR	T DOCUMEN	ITS AND EXH	IBITS					Options Processing
Index Search		🗸 Menu 🗸		14 4	Page 1	of 1   🕨		Displaying 1	- 10 of 10	Display	Checked 🗧	Add Notes
Z-COURT DOCUM	ENTS AND EXHIBITS	6 🔲 Change System		El.	CASE #	FILE DA	PLANTIFF	DEFEN	CASE T	COURT/	DOCUM	
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PLANTIFF			[	N	241780	03/15/2	J JARRED	T JARRED	С	MONTO	GARNIS	
DEFENDANT			[	N	241780	04/22/2	J JARRED	T JARRED	С	MONTO	PETITION	
CASE TYPE			4		241780	07/24/2	J JARRED	T JARRED		BEAR	PICTURE	
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,					241780	07/24/2	J JARRED	T JARRED		MONTO	PICTURE	
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								A 1				

Once you complete the notes entry select



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

dex Search Venu -	🔢 4 Page 1 of 1   > >											
-COURT DOCUMENTS AND EXHIBITS 🗐 Change Sys	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE				
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	I N	241780	03/15/2017	J JARRED	T JARRED	С	MONTOGUE	FIRST SUPPLEMENT				
LANTIFF	📄 N S	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT				
DEFENDANT	I NL	241780	04/22/2017	J JARRED	T JARRED	с	MONTOGUE	PETITION				
ASE TYPE		241780	07/24/2018	J JARRED	T JARRED	с	BEAR	PICTURE				
		241780	07/24/2018	J JARRED	T JARRED	с	BIRD	PICTURE				
COURT/JUDGE		241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE				
OCUMENT TYPE		241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE				
rom Date 📑 To Date 📑		241780	07/30/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE IMPORT				
Search 🔄 Functions -		241780	01/18/2018	J JARRED	T JARRED	с	J DOWNS	WORD				

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

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

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

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4	4		of 1             2				_		isplay Options -	( Close	
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	NL	241780	04/22/2017	J JARRED 🕂	Add Notes		MONTOGUE	PETITION	IMAGE	FILE DATE:	03/15/2017
		241780	01/18/2018	J JARRED	-	_/	DOWNS	WORD	OEM	PLANTIFF:	J JARRED
				1	Index Details Index Mainten	ance				DEFENDANT: CASE TYPE:	T JARRED C
				ी। स	Show Routing Route Docume					COURT/JUDGE:	MONTOGUE
				S	Load Indexes Audit Informat	tion				DOCUMENT TYPE:	FIRST SUPPLEMENTAL
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					Download					CREATE-DATE:	2011/07/01
										VIEW-DATE:	02/22/2016
										PAGES:	004
										DELETE:	
										NOTES:	Y
										ROUTE:	Y
										WORKBASKET USER:	
										CREATED BY USER:	
Di	F)		Device Id:\$0011	19236 User Id	: MCKENZY		© Real Viso	on Software. All I	Rights Reserved.	CHECKED OUT:	MONTY

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

Index Maintenance: (Labeled as Maintain Selected when multiple records are flagged.) Allows for the

### updating of index values and the deletion of the record.

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14		Page 1 d	f 1 🕨 🕅 🎅	Displ	aying 1	- 4 of 4 🖾	Retrieve Reque	st 🖸 Display (	Checked 📃 D	isplay Options 🕶	Index Maintenance	
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PD	F)		Device Id:\$0011	9236	User Id	: MCKENZY		© Real Viso	n Software. All F	Rights Reserved.		

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

index Search	V Menu 🗸		P	age 1 of 1		Displaying 1 - 4 o	4	🔄 Retriev	e Request 🛛 🔀	Display Checked	Display Options •
Z-COURT DOCUMENTS AND EXHIBITS	🗐 Change System		_	CASE #	FILE DAT	E PLANTIFF	DEFENDA	NT CASE TYPE	COURT/JU	DOCUMENT TYPE	TYPE
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COURT/JUDGE					1	Index Details					
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From Date 📑 To Date					<b>.</b>	Show Routing					
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couting Information					2	Add to Staple Grid					
🛞 Close					6	Show In Window					
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MCKENZY 99	*MANUAL			отмннттр	10/01	/18	11:41:33	10/01/18	11:4:	1:33	AAAADSK

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

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	Flags	CASE #		FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT TYPE	ТҮРЕ
	Flags NR NRS NL	CASE # 241780 241780 241780 241780		FILE DATE 03/15/2017 03/15/2017 04/22/2017 04/22/2017 01/18/2018 Add Notes Email Image Index Details Index Details Index Maintenance Route Document ▶ Load Indexes Audit Information Add to Temporary Add to Staple Grid Show In Window Download	PLANTIFF J JARRED J JARRED J JARRED J JARRED J JARRED J JARRED Route To User Route Using Pr	T JARRED T JARRED T JARRED T JARRED	CASE TYPE C C C C C C C	MONTOGUE MONTOGUE MONTOGUE J DOWNS	FIRST SUPPLE GARNISHMENT PETITION WORD	TYPE IMAGE IMAGE OEM
/=	`								- 1	
(P	DF)			Device Id:\$(	00119236 User	Id: MCKENZY		© I	Real Vison Software.	All Rights Reserved.

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

🚽 Pa	ge 1 of 1 🕨 🕨	Displaying 1 - 9	of 9		🔄 Retrieve Re	equest 🔀 Dis	play Checked 📃 D	isplay Optior
Flags	LOAD#   ORDER#	# PRO#	DOC TYPE	INDEX 8	INDEX 9	ТҮРЕ	CREATE-DATE	PAGES
	Email Image Index Details Index Maintenance Route Document Linking Load Indexes Audit Information Add to Temporary Add to Staple Grid Show In Window Download	C-COURT SYST D-AP SYSTEM	DOC1 DOC2 DOC4 DOC5 DOC6 DOC7 DOC8 DOC3 121			IMAGE IMAGE IMAGE IMAGE IMAGE IMAGE IMAGE IMAGE	2018/09/01 2018/10/31 2018/08/30 2018/08/30 2018/08/30 2019/04/03 2018/08/23 2018/08/28 2018/08/28	006 001 007 012 016 001 001 006 005

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

Image Inquiry	Z-0	OURT D	OCUMENTS AND EX	CHIBITS						۵? ۵
Index Search Venu •		I I P	Page 1 of 1	🕨 🕅 ಿ Die	splaying 1 - 4 of 4		🔄 Retriev	e Request 🛛 🔀	Display Checked	Display Options 🗸
Z-COURT DOCUMENTS AND EXHIBITS 🗐 Change System		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT TYPE	туре
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T JARRED		NL	241780	04/22/2017	J JARRED	T JARRED	С	MONTOGUE	PETITION	IMAGE
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**Audit Information:** Provides the ability to view all activity for the document being viewed. Available filters: View, Print, Email, Change, Route, Fax, CD, Signature

COURT DOCU     Back Q     Flags	ue Up For Approval	📔 Que Up Fo	r Batch Indexing	Pop-A-	Que Records: 2		Display (	Options 👻 🕍 Wo	orkbasket Charts 🗸
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	658966	09/12/2018	I JAMES	W REED	W	Q OSCAR	PETITION		0
Real Vision Imag	e Inquiry		Device Id:\$00	)119421	User Id: MCKENZY		© Real	Vison Software. A	ll Rights Reserved.
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udit Information									
	Page 1 of 2	► N   @ 1	Displaying 1 - 25 of	49 Audi	it Filters 🔻				
) Close	Page 1 of 2				it Filters 🗸 View Request	Date		Time	
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**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.)

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Z-COURT DOCUMENTS AND	EXHIBITS 🗐 Change System		Flags	CASE #	F	TLE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU	DOCUMENT TYPE	TYPE
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01/18/2018				241780		03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLE	IMAGE
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Temporary Grid ┥					2		rid					
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	GARNISHMENT	241780		03/15/	2017		J JARRED	T JARR	ED	С	4	IONTOGUE

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

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Z-COURT DOCU	MENTS AND EXHIBITS	📕 Change Syster	-		CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
011319			Flags								
04/24/2019						04/24/2019	K ILES	O PAUL	E	W TIME	JUDGEMENT
K ILES			011319			04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
			S			04/24/2019	K ILES	O PAUL	E	W TIME	PETITION
O PAUL			Add Notes			04/24/2019	K ILES	O PAUL	E	W TIME	PIC
E					Email Image						
W TIME				1	Index Details						
DOCUMENT TY	PF			6	Index Maintenance						
				4	Route Document 🕨						
From Date	To Date			3	Load Indexes						
🔍 Search	E Functions -	🖉 Clear		Ø	Audit Information						
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				2	Maintain Staple					apled bundle. Th	
				2	Add to Staple Grid		the Flags col				······
		t		6	Show In Window						
				Download							
				Delete Item							

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.)

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Delete Item: Delete the selected record from Image Inquiry.

Image Inquiry 🔍	Z-CO	OURT DO	CUMENTS AND EXHI	BITS					۵ ?
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**Undelete Item:** Remove the delete designation from a record in Image Inquiry. The user must have authority to view deleted records in order to access this option.

Image Inquiry (Host-Socket Connected)	Z-CO	OURT D	DCUMENTS A	ND E)	CHIBITS						\$ ? \$
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Show Deleted Records						(	noose undele	te Item.			
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If 'Show Deleted Records' is not available, contact your system administrator. This				Ţ	Download						
function is controlled in option security					Undelete Item						
using Option Code # OneLook Include Deleted Records.				2		-					
	(PD	F)		-	Device Id	:\$00149699 Us	er Id: MCKENZY		©R	eal Vison Software. A	All Rights Reserved.

**Z-Options:** Custom functions for your organization. Refer to <u>Z-Options</u> topic.

# 8. FUNCTIONS

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

Audit	Drag Drop	Email	<b>Fax</b> (Customer must have fax adapter installed.)
File Import	Image Index Maintenance	Image Markup	Linking
Notes	<b>OCR</b> (Included in RVI PC Viewer Version 9.3 and newer.)	<b>Print</b> (IBM i direct print not included.)	Polling
Redaction	Routing	Scanning	Screen Scrape
Spool File Search	Stapling	Viewing	Workflow

# 8.1. Additional Index Filter

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

Image Inquiry		~	
Index Search		🔻 Menu 👻	
Z-COURT DOCUMENTS AND EXH	IBITS	💼 Change System	
CASE NUMBER			
FILE DATE			
PLAINTIFF			
DEFENDANT			
CASE TYPE			Provides an advanced index
COURT/JUDGE			search allowing users to narrow the search results by the following
DOCUMENT TYPE			image types:
From Date	To Date		Black/White
Show Deleted Records			Reports
Additional Index Filter			<ul> <li>External (such as Microsoft Office files)</li> </ul>
Black/White Image Types			Color
Reports Image Types			
External Image Types Color Image Types			Additional search criteria
			include: <ul> <li>Routed Items</li> </ul>
Include Only Items Routed			Noted Items
Include Only Noted Items			
Search	🙀 Functions 🗸	🚫 Clear	
	Scan Functions     Scan Functions     Drag Drop/Import Funct     Batch Indexing     Additional Index Filter	•	
	Additional Index Filter		

## 8.2. Advanced Search

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

Advanced 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, Advanced Search to open the grid.

Image Inquiry (Host-So	cket	Connected) 《
Index Search		V Menu -
1-IMPORTED MIQ DATA	A	Change System
LOAD#		
From-ORDER#		Through-ORDER#
PRO#		
TRAILER		
SERIAL		
From Date	E	Through Date
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INDEX8		
INDEX9		
From Date	0	<sup>3</sup> To Date
🔎 Search	्रि सि	Functions • Olear
	4 12 14 14 14 14 14 16 16 10	

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

There are 4 Advanced Search options:

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

### Horizontal Search:

Include an index record if:

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

Continuing through ALL Grid Rows.

Example: Horizonta	I Search Using Fir	alize Search

	ket Connected)	~	1-IM	IPORTED I	1IQ DATA										0?2
Index Search	V Menu	<b>P</b> ^		A Page	e 1 of J		Displ	aying 1 - 4	of 4 🖁	, Retrieve Req	uest 🔽	Display C	hecked	🔲 Display	Options -
1-IMPORTED MIQ DATA	Change Syste	m			DAD# ORD	PRO#	TR	SERIAL	NEW	DOC TYPE	INDEX	IN	TYPE	CREA	PAGES
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From-ORDER#	Through-ORDER#					8213826				BL			IMAGE	2015/	001
PRO#		5				8214910				BL			IMAGE	2015/	001
						8217198				BL			IMAGE	2015/	001
TRAILER						8214910				MISC			IMAGE	2015/	001
SERIAL			1			•									
From Date	Through Date			_											
DOC TYPE		~													
INDEX8															
INDEX9		5/	1												
	To Date														
From Data															
From Date			(PDF	5		Device Id:\$001	46021	User Id: N	ICKENZY		Ø	Real Viso	n Software	•. All Rights	Reserved.
From Date An extra search criteria		-	(PDF	-)		Device Id:\$001	46021	User Id: №	ICKENZY		©	Real Viso	n Software	e. All Rights	Reserved.
			(PDF	=)			46021	User Id: №	ICKENZY		©	Real Viso	n Software	e. All Rights	Reserved.
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An extra search criteria Advanced Search Grid Close $\oslash$ Finalize Searc	a has been entered	-		s 💿 Fina		& View		User Id: № W DATE		DOC TYPE		Real Viso	n Software	e. All Rights	
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An extra search criteria Advanced Search Grid Close $\oslash$ Finalize Searc	a has been entered	-	/ Totals	s 💿 Fina	ilize W/ Totals	& View				DOC TYPE			n Software	-	

Example: Horizontal Search Using Finalize W/Totals

Image Inquiry (Host-Soc	ket Connected)	~	1-II	IPORT	ED MIQ D	ATA										3?4
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PRO#	· · · · · · · · · · · · · · · · · · ·						8214910				BL			IMAGE	2015/	001
TRAILER		- 1					8217198				BL			IMAGE	2015/	001
		-1	•				8214910				MISC			IMAGE	2015/	001
SERIAL							7									
From Date	Through Date						/									
DOC TYPE		~														
INDEX8																
INDEX9						/										
From Date	To Date															
From Date An extra search criteria		-	(PD	IF)		De	evice Id:\$00	46021	User Id: №	ICKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
			(PD	IF)	/	De	evice Id:\$00:	46021	User Id: №	ICKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
An extra search criteri			(PD	IF)	/	De	evice Id:\$00:	46021	User Id: №	ICKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
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An extra search criteri	a has been entered	• Finalize V		/	Einalize W/	' Totals &	· · ·			ICKENZY	INDEX			on Software DEX9		Reserved.
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An extra search criteria Advanced Search Grid Close $\bigcirc$ Finalize Sear	a has been entered	• Finalize V	V/ Total	/		' Totals &	View				INDEX				Cc	

### Example: Horizontal Search Using Finalize W/Totals & View

Image Inquiry (H	lost-Socket Connected)		« <		Back			^	«
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From-ORDER#	Through-OF	RDER#	Θ	- Add t	to Temporary		SAMSUNG ELECTRONICS AMERICA BILL OF LADING NUMBER: 8213826 N <sup>®</sup> DE CONNAISSEMENT c/o Newsi Logistics (Mississuagi)		sing
PRO#	Through of			o Displa	ay Temp Grid		6580 Milcreek Dr Mississauga ON LSN 883 CA		
TRAILER			3	ြ Retri	ieve Request		Tel. CARRIER / TRANSPORTEUR : Speedy Transport SHIP TO / EXPEDIER À TRULER NUMBER (N' N° DE TRALER: DISTRIBUTION CENTRALE L'EE Audio Video Centrale SEAL NUMBER(N) N° DE SCAU:		
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							<b>X</b>		
From Date	To Date			Combir	ned Images				
An extra search	h criteria has been ente	ered	<b>•</b>		-			<b>I</b> *	
									*
Advanced Search	n Grid								
🚫 Close ⊘ Fina	alize Search 📝 Horizontal	Vertical 🔚 Fina	lize W/ Tota	ıls 💿	Finalize W/ Tot	tals & 1	& View		
LOAD#	ORDER# P	RO#	TRAILER		SERIAL		NEW DATE DOC TYPE INDEX8 INDEX9 Counts		
	8	213826					1		
	8	214910					2		
	8	217198					1		
							This is an example of Horizontal search using the Finalize W/Totals & View b	out	con.

### 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.

Image Inquiry (Host-Soc	ket connecteu)			1-IM													
Index Search		Menu 👻	-		A P	age 1	of 1		Disp	laying 1 - 4	of 4	Retrieve Rec	quest 🔽	Display	Checked	🔲 Display	Options -
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From-ORDER#	Through-ORDER#							8213826				BL			IMAGE	2015/	001
PRO#								8214910				BL			IMAGE	2015/	001
								8217198				BL			IMAGE	2015/	001
TRAILER			4					8214910				MISC			IMAGE	2015/	001
SERIAL																	
From Date	Through Date					/											
DOC TYPE		~			/												
DOC TYPE INDEX8 INDEX9																	
INDEX8	To Date																
INDEX8 INDEX9 From Date	To Date		-	(PDF	;)		De	vice Id:\$001	46021	User Id: M	1CKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
INDEX8 INDEX9 From Date	To Date		•	(PDF	;)		De	vice Id:\$001	46021	User Id: N	1CKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
INDEX8 INDEX9 From Date An extra search criteria	To Date		•	(PDF	;)		De		46021	User Id: №	ICKENZY		©	Real Viso	on Software	e. All Rights	Reserved.
INDEX8 INDEX9 From Date An extra search criteria	To Date a has been entered					īnalize W/	De / Totals & \	· · ·	46021	User Id: №	ICKENZY		©	Real Vise	on Software	e. All Rights	Reserved.
INDEX8 INDEX9 From Date An extra search criteria Advanced Search Grid	To Date a has been entered ch Horizontal V Vertic	al = Finalit		Totals		inalize W/	/ Totals & V	· · ·			ICKENZY C TYPE	INDE			on Software		Reserved.
INDEX8 INDEX9 From Date An extra search criteria Advanced Search Grid Close Finalize Sear	To Date a has been entered ch Horizontal V Vertic	al = Finalit	ze W/	Totals			/ Totals & V	View				INDE					
INDEX8 INDEX9 From Date An extra search criteria Advanced Search Grid Close Finalize Sear	To Date a has been entered ch  Horizontal  Vertic R≠ PRO≠	al = Finalit	ze W/	Totals			/ Totals & V	View		DOG	CTYPE	INDEX				Cc	

## Example: Vertical Search Using Finalize Search

### WildCard Search Example:

- Ending Value and Bookend Value wild card searching must be explicitly enabled by your RVI System Administrator.
- 1. Beginning Value: Searching for all case numbers that begin with 27.

Image Inqui <mark>ry (Host-S</mark>	iocket Connected)	*	Z-C	OURT D	OCUMENTS /	AND EXHIBITS					@ ? ¢
Index Search		Menu 🗸			Page 1	of 1 🕨 🕅 🧬	Displaying 1 - 5 of	5 🖁 Retrieve I	Request 🔽 Dis	play Checked	Display Options 🗸
Z-COURT DOCUMENTS	5 AND EXHIBITS 👘 Chang	je System		Class.	CASE #	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
CASE #				Flags							
FILE DT				N	274911	06152012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	EVIDENCE
PLANTIFF				NR	274911	08072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	MOTION
					274911	05072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	ORDER
DEFENDANT				R L	274911	05072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	PETITION
CASE TYPE		~		NRS	275850	01052009	OSCAR J PAUL	ELAINE M PAUL	DIV	MYERS	COMPLAINT
COURT/JUDGE				$\nearrow$							
DOCUMENT TYPE			$\checkmark$								
From Date	To Date	~									
An extra search crite	eria has been entered 📝										
0	A	A									
🔎 Search	ଜ Functions -	Oclear	(PD	F)		Device Id:\$00146	021 User Id: MCK	ENZY	© Rea	l Vison Software. A	All Rights Reserved.
						•					
Advanced Search Grid	/										
🔕 Close 🕜 Finalize Se	earch 🛛 Horizontal 🔲 Vertical 🚦	Finalize W/	/ Total	s 🕚	Finalize W/ Tot	tals & View					
CASE #	FILE DT	PLANTIF	F		DEFE	ENDANT	CASE TYPE		COURT/JUDGE	DO	CUMENT TYPE
27*											

2. Ending Value: Search for all case numbers that end with 911.

Image Inquiry (Host-Socket Connected)	~	Z-C	OURT DO	CUMENTS AND E	KHIBITS					; €
Index Search 🗸 Menu 🗸		N	Pa	age 1 of 1	🕨 🕅 ಿ Disp	laying 1 - 4 of 4	វីរិ គ	letrieve Request	Display Checked	🔲 Display Options 🗸
Z-COURT DOCUMENTS AND EXHIBITS	<b>.</b>		_	CASE #	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #	1		Flags							
FILE DT	1		N	274911	06152012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	EVIDENCE
PLANTIFF	1		NR	274911	08072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	MOTION
				274911	05072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	ORDER
DEFENDANT	•		R L	274911	05072012	BOWEN LLC	ANNA SMITH	ACC	SAMUEL	PETITION 4
DOCUMENT TYPE From Date To Date										
entered										
entered	-	(PD	F)			146027 User Id: M	CKENZY	(	© Real Vison Software	e. All Rights Reserved.
entered		(PD	F)			146027   User Id: M	CKENZY	(	© Real Vison Software	e. All Rights Reserved.
entered ♀ Search   窟 Functions -   ◆ Clear		(PD	F)				CKENZY	(	© Real Vison Software	e. All Rights Reserved.
entered ♀ Search 哈 Functions • ◆ Clear Advanced Search Gpd	•			V/ Totals () Final		•	CKENZY	(	© Real Vison Software	e. All Rights Reserved.
Advanced Search Grid	•					v	CKENZY SSE TYPE	COURT/JUI		e. All Rights Reserved.

3. Bookend Value: Search for all case numbers that begin with 2 and end with 80.

mage Inquiry (Host-Socke	et Connected)	Z-C	OURT DO	CUMENTS AND EX	HIBITS					0?¢
Index Search	Menu 🗸 🌰		A Pa	ge 1 of 1	🕨 🕅 ಿ Disp	olaying 1 - 7 of 7	រឺ្] Ret	rieve Request	Display Checked	Display Options -
Z-COURT DOCUMENTS AN	D EXHIBITS 🔚		<b>Flags</b>	CASE #	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #			Flags							
FILE DT			N R	241780	20110616	JOHNATHAN CH	TARA ST. ROMA	DIV	JOHNSON	AMENDMENT
PLANTIFF			N	241780	20200317	JOHNATHAN CH	TARA ST. ROMA	DIV	JOHNSON	MISC
				241780	20110612	JONATHAN CHA	TARA ST. ROMA	DIV	JOHNSON	ORDER
DEFENDANT		•	N R S	241780	06132011	JONATHAN CHA	TARA ST. ROMA	DIV	JOHNSON	PETITION
CASE TYPE	~		N R S	241780	20110617	JOHNATHAN CH	TARA ST. ROMA	DIV	JOHNSON	PETITION
COURT/JUDGE				241780	20110615	JOHNATHAN CH	TARA ST. ROMA	DIV	JOHNSON	PHOTO
DOCUMENT TYPE				241780	06012011	JONATHAN CHA	TARA ST. ROMA	DIV	JOHNSON	SUPPLEMENTAL
From Date 🛛 To D An extra search criteria entered			/							
🔎 Search 👘 🙀 Function:	s 🔹 🔗 Clear 🖕	(PD	F)		Device Id:\$00	146027 User Id: MCK	ENZY		© Real Vison Softwar	e. All Rights Reserved.
	/	L				•				
Advanced Search Grid										
	_	1.000								
🗿 Close 🕜 Finalize Search	Verti	cal ¦⊟	Finalize W	// Totals 💿 Finali	ze W/ Totals & Vie	w				
CASE #	FILE DT		PLANTI	FF	DEFENDANT	CASE	E TYPE	COURT/JUI	DGE	DOCUMENT TYPE
2*80										

4. Contained Value: Search for all case numbers that contain 179.

Image Inquiry (Host-Socket Connected)	~	Z-C	OURT D	OCUMENTS AND E	XHIBITS					@?¢
Index Search Venu			I P	Page 1 of 1	🕨 🕅 ಿ Disp	laying 1 - 3 of 3	រឹ្ Re	rieve Request	Display Checked	Display Options - DOCUMENT TYPE
Z-COURT DOCUMENTS AND EXHIBITS	•		Chara.	CASE #	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #			Flags							
FILE DT				241790	032520	JONATHAN CHA	TARA ST. ROMA	DIV	P WALTER	APP
PLANTIFF	-		L	241790	032520	JONATHAN CHA	TARA ST. ROMA	DIV	P WALTER	PETITION
DEFENDANT			L	241790	032520	JONATHAN CHA	TARA ST. ROMA	DIV	P WALTER	PETITION
										1
CASE TYPE										
COURT/JUDGE		$\checkmark$								
DOCUMENT TYPE		1								
From Date 🖸 To Date										
An extra search criteria has been entered										
🔎 Search 🛛 🏟 Functions 🗸 🔗 Clea	r 🖵	(PD	F)		Device Id:\$001	46027 User Id: MCK	ENZY	(	© Real Vison Softwar	e. All Rights Reserved.
					_	-				*
Advanced Search Grid	_									
Close O Finalize Search V Horizontal	Vertic	al∦⊟	Finalize	W/ Totals 💿 Fina	lize W/ Totals & Viev	v				
CASE # FILE DT			PLANT	TIFF	DEFENDANT	CASI	E TYPE	COURT/JUE	DGE	DOCUMENT TYPE
*179*										

To clear the Advanced 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.'

Index Search		Menu -
Z-COURT DOCUMENTS AND EXI	HIBITS	Change System
CASE #		
FILE DT		
PLANTIFF		
DEFENDANT		
CASE TYPE		*
COURT/JUDGE		
DOCUMENT TYPE		
From Date	To Date	
An extra search criteria has t	oeen entered	1
🔎 Search 🛛 🏟 Fund	ctions 🗸	🔗 Clear

# 8.3. Append

To watch a video on this topic CLICK HERE

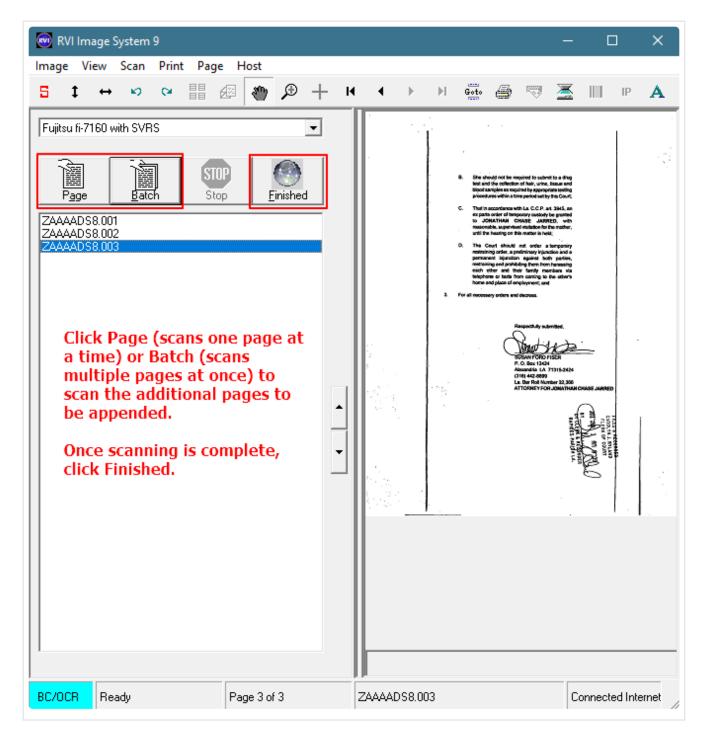
Scan additional pages to an existing image. (*Appends are not available for OEM documents such as PDF, DOCX, XLSX*.)

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

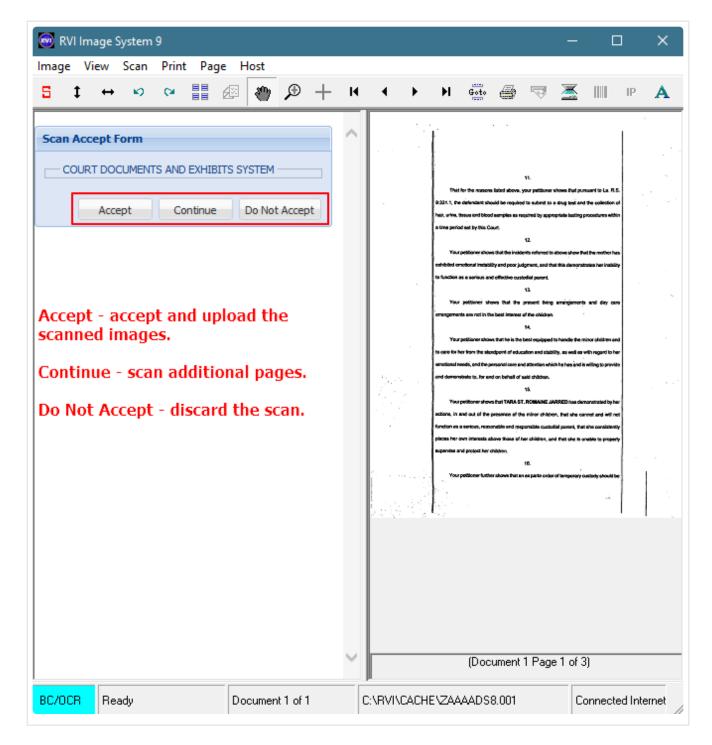
mage Inquiry (Socket Connected)	«	Back	A 1.
ndex Search 🗸 Menu 🗸		🖹 Notes 🗸	
Z-COURT DOCUMENTS AND EXHIBITS 📃 Change System		(1) Details	
061606		Maintenance	CIVIL SUIT NUMBER 241,789 Division "A"
01/23/2019	ลี่ไ	Email	JONATHAN CHASE JARRED 8TH JUDICIAL DISTRICT COURT
JONATHAN CHASE JARRED		Routing -	VERSUS PARISH OF RAPIDES TARA ST. ROMAINE JARRED STATE OF LOUISIANA
TARA ST. ROMAINE JARRED		Audit Information	FIRST SUPPLEMENTAL AND AMENDING PUTITION
A	11	Append Scan	L The allegations of plaintiffs organized Patition for Divorce and Other Relief are reinned and afferred save and except as may be inconsistent herowith:
DALTON BARNS	11	Add Redaction	теритицо ала аптело зате али соцор во тау че полнения пенения. И.
ORDER	í I	Download	That your petitioner dealms to amend his Petition for Divorce and Other Relief by adding paragraph 19 to read as follow:: 19.
From Date 🖪 To Date	1	Add to Temporary	The defendant has recently exhibited volatile and entatic behavior and mood ewings and your petitioner shows that it
🔾 Search 🛛 🖓 Functions 🗸 🖉 Clear		Display Temp Grid	would be in the best interest of the children for the Court to order a psychological evolution of befun particle by a montal
	-1	Retrieve Request	health professional selected by the Court, and that this would be in the best interest of the children."
			WHEREFORE, YOUR PETITIONER PRAYS: 1. That this amended pleading be deemed good and sufficient and be ordered
			<ol> <li>That the prayer of the petitioner's original Petition for Divorce and Other Relief is relevanted and reaffirmed, save and except as may be boondateril</li> </ol>
			herewith; 3. That all allegations of the proyer are pleaded in the attentive were one may be inconsistent with another; and
			P 1 2 4. For all necessary orders and decrees.
		Image ID:ZAAAADS7	

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.

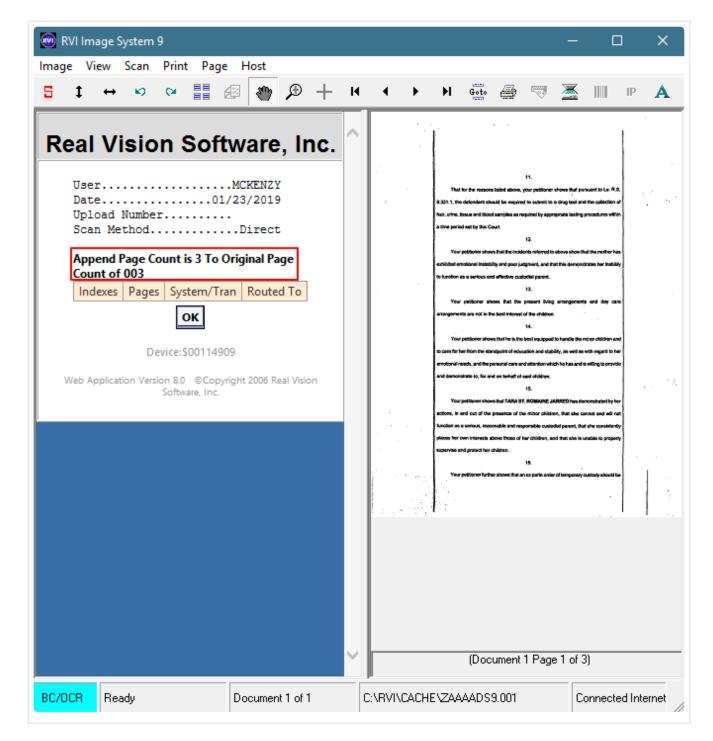


4. Click Accept, Continue, or Do Not Accept.



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

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



## 8.4. Audit

Audit is available in WorkBaskets and Image Inquiry. RVI also offers a <u>dashboard</u> for additional auditing.

### 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

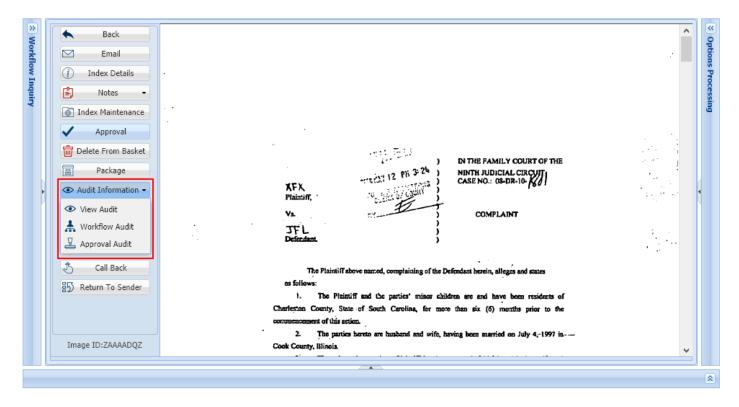
### results.

•	Back 🔽 Que Up	For Approval	📔 Que U	p For	Batch Indexing	P	Pop-A-Que	Records: 2		E Display C	Options 👻 🕍 Wo	rkbasket Charts
	Flags	CASE #	FILE DATE	:	PLANTIFF	D	EFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT	PRIORITY C	DAYS OLD
	Ĩ	201702	08/16/201	7	M JOE	J	LOU	с	DOUGLOUS	PETITION		0
	i #>>>	658966	09/12/201	8	I JAMES	W	V REED	W	Q OSCAR	PETITION		0
					Show Notes Add Notes Email Image Index Details Index Maintenan Audit Informatio	_					rd in the wo mation.	orkbasket.
Der	l Vision Image Ing	uirv			Z-Options		9421 User I	d: MCKENZY		© Real	Vison Software. Al	Rights Reserved

	🗲 Back 🔽 Que U	Ip For Approval	📄 Que Up Fo	r Batch Indexing 🚦	Pop-A-C	Que Records: 2		Display (	Options 👻 🕍 Wo	orkbasket Charts 🔻	П
	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDA	ANT CASE TYPE	COURT/JUDGE	DOCUMENT	PRIORITY C	DAYS OLD	l
•		201702	08/16/2017	M JOE	J LOU	с	DOUGLOUS	PETITION		0	4
		658966	09/12/2018	I JAMES	W REED	W	Q OSCAR	PETITION		0	
	Real Vision Image Inc	quiry		Device Id:\$00	119421	User Id: MCKENZY		© Real	Vison Software. A	ll Rights Reserved.	ľ
Idit	t Information										
) Cl	lose			Displaying 1 - 25 of 4		t Filters •					
Cl	lose 4 Page	Туре		Displaying 1 - 25 of 4	stina 👁	View Request	Date		Time		
er CHC	lose 4 Page	Type			stina 👁		01/29/19		14:49:56		
er CHC	lose 4 Page	Туре			stini 👁	View Request	01/29/19 03/19/19		14:49:56 14:46:53		
er CHC	lose 4 Page C HHTTP	Type	v v		stina 💿	View Request Print Request	01/29/19		14:49:56		
Cler CHC MH UR	lose 14 4 Page C HHTTP RT	Type VIEV VIEV	v V V		stina 💿	View Request Print Request E-Mail Request Change Request	01/29/19 03/19/19		14:49:56 14:46:53		
) Cl er CHC MH UR	lose 14 4 Page C HHTTP RT	Type VIEV VIEV VIEV			stina C C C C C C C C C C C C C C C C C C C	View Request Print Request E-Mail Request Change Request Route Request	01/29/19 03/19/19 03/19/19		14:49:56 14:46:53 14:47:06		
CHC CHC MH UR UR	lose 14 4 Page C HHTTP RT RT	VIEV VIEV VIEV VIEV VIEV			stina C M M M M M M M M M M M M M	View Request Print Request E-Mail Request Change Request Route Request Fax Request	01/29/19 03/19/19 03/19/19 03/19/19		14:49:56 14:46:53 14:47:06 14:47:10		
I Cl er CHC MH UR UR KEI	C HHTTP RT RT NZY	VIEV VIEV VIEV VIEV VIEV VIEV				View Request Print Request E-Mail Request Change Request Route Request	01/29/19 03/19/19 03/19/19 03/19/19 03/19/19 09/12/18		14:49:56 14:46:53 14:47:06 14:47:10 14:48:43		
) Cl er CHC MH UR UR KEI	C HHTTP RT RT ENZY ENZY	Type           VIEV           VIEV           VIEV           VIEV           VIEV           VIEV           VIEV           VIEV           VIEV			stina	View Request Print Request E-Mail Request Change Request Route Request Fax Request	01/29/19 03/19/19 03/19/19 03/19/19 03/19/19 09/12/18 09/12/18		14:49:56 14:46:53 14:47:06 14:47:10 14:48:43 14:49:09		

### OR

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



View Audit

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

Audit Information				
Close 4 Page 1	of 1 🕨 🕅 🥭 Displaying 1 - 8 of 8	Audit Filters •		
User	Туре	View Request n	Date	Time
MCKENZY	VIEW	Print Request	05/16/18	11:17:05
MCKENZY	VIEW	E-Mail Request	05/16/18	11:17:38
MCKENZY	VIEW	Change Request	05/16/18	11:21:05
MCKENZY	VIEW	Route Request	05/16/18	11:21:10
MCKENZY	VIEW	Fax Request	05/17/18	10:04:49
MCKENZY	VIEW	CD Request	05/17/18	10:45:43
MCKENZY	VIEW	Signature Request	05/17/18	10:45:44
MCKENZY	VIEW		06/06/18	10:10:19

⊘[ Workflow Audit

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

S Close	nionnación									
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:

🖳 Approval Audit

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, right-mouse click or double click a record then choose Audit Information.

The audit information table will open at the bottom of the screen.

Image Inquiry	~					2.	
Index Search	Menu -	Back					
Index Sedron	▼ Menu ▼	🖹 Notes -	c c	IVIL SUIT NUMBER.			opuon renoun
Z-COURT DOCUMENTS	AND EXHIBITS	(j) Details		Division "A" 9TH JUDICIAL DI	TRICT COURT		
658966		Maintenance	· VERSUS		H OF RAPIDES		
FILE DATE		Email		STATE	OF LOUISIANA	1.1.1	- Internet
			FIRST SUPP	LEMENTAL AND AMENDING PETITION			
PLANTIFF		Routing	The allegations of pla	t. Intilf's original Petition for Divorce and (	Other Relief are	19	
DEFENDANT		Audit Information		and except as may be inconsistent herewith			
CASE TYPE	1	🚅 Stapling		н.			
COURT/JUDGE	I	Linking	That your petitioner de adding paragraph 19 to read	sires to amend his Petition for Divorce and as follows:	Other Relief by		1
DOCUMENT TYPE		Append Scan		-19. has recently exhibited volatile and erra	rtic		
	Data 177		behavior and m	ood swings and your petitioner shows that	18		
From Date 🖪 To	Date 🗖	Add Redaction		best interest of the children for the Court ogical evaluation of both parties by a men			
🔍 Search 🛛 🖄 Functio	ons 🗸 🖉 Clear 🖉	Download		nal selected by the Court, and that this wo terest of the childron."	uid		
		<ul> <li>Add to Temporary</li> </ul>					
		Display Temp Grid		PETITIONER PRAYS:			
		Retrieve Request		ed pleading be deemed good and sufficien	t and be ordered		
			filed;	of the petitioner's original Petition for Di			
		Image ID:ZAAAADQZ	Relief is reiternt	ed and reaffirmed, save and except as may	y be inconsistent	~	
/							
¥							3
Audit Information							
⊗ Close 🛛 🔍 Pag	e 1 of 3 🕨	🔰 ಿ Displaying 1 - 25	of 51 Audit Filters 🔹 🕍 Audit C	Charts 🛛 😝 Workflow Audit			
User	Туре		Destination	Date	Time		
	×	×	×		×	×	
RICHC	VIEW			01/29/19	14:49:56		
QTMHHTTP	VIEW			03/19/19	14:46:53		
COURT	VIEW			03/19/19	14:47:06		
COURT	VIEW			03/19/19	14:47:10		

### Audit Information Options:

Audit Filters 🗸

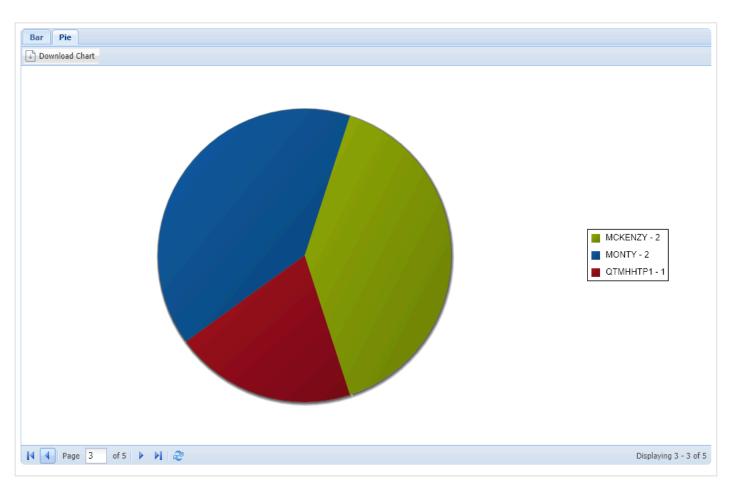
to select the desired request type to be queried. By default, the audit request type is set to *View Request*.

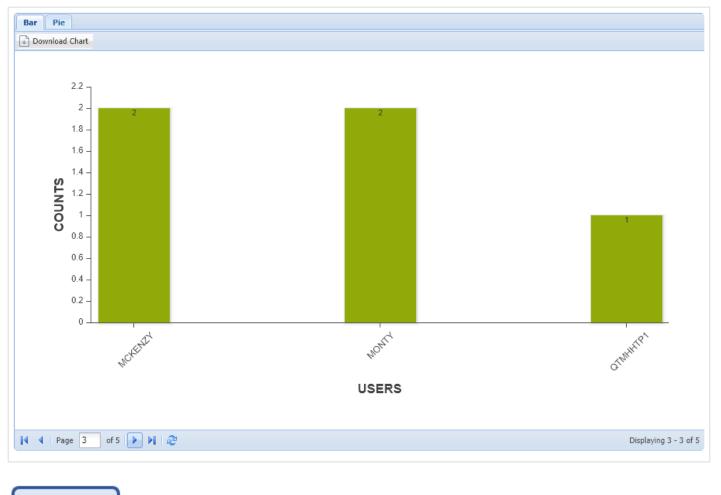
Audit Filters -

- View Request
- 🖶 Print Request
- E-Mail Request
- 随 Change Request
- 🖏 Route Request
- 🕞 Fax Request
- OD Request
- 🖄 Signature Request

益 Audit Charts

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





### ⊗[‡ Workflow Audit

orkflow Audit Inf

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

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

## 8.5. Batch Indexing

1. Select Functions/Batch Indexing

Image Inquiry (Host-S	ocket	Connected)		~
Index Search				Menu 👻
Z-COURT DOCUMENTS	5 AND	EXHIBITS	🔚 Change	e System
CASE NUMBER				
FILE DATE				•
PLANTIFF				
DEFENDANT				
CASE TYPE				
COURT/JUDGE				
DOCUMENT TYPE				~
From Date	6	To Date		•
Search	i 🛱	unctions -		🔗 Clear
	2	Scan Functi	ons	•
		Drag Drop/I	mport Functi	ons 🕨
	Ŀ	Batch Index	ing	
	66	Additional I	ndex Filter	
	Þ	Advanced S	earch	

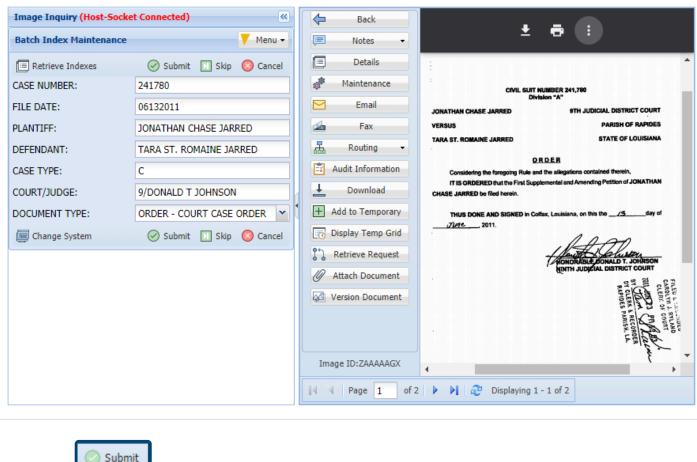
2. Single mouse click the batch to be worked.

Image Inquiry (Host-Socket Connected)							
Batch Index	List		🔻 Menu 🕶	ŀ			
🖕 Back	Total	Batches: 1	🚺 Refresh				
Batch Name	Count	Date	In Use By				
EXTERNAL	00002	02/22/21					

3. Index the image.



**NOTE:** The <u>Retrieve Indexes</u> button seen here is for custom interfaces. For more information on custom interfaces, contact <u>RVI Support</u>.



4. Click to save the index values.

### OR

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

## 8.5.1. Retrieve Indexes

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

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

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

### Image Inquiry:

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

#### WorkBasket:

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

## 8.5.2. Add To Previous Doc

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

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

### Image Inquiry:

Image Inquiry			*
Batch Index Mainte	nance		🔻 Menu 🗸
Retrieve Indexes	🕂 Add	to Previous	Doc
CASE #:		121915	
FILE DATE:			
PLANTIFF:			
DEFENDANT:			
CASE TYPE:			
COURT/JUDGE:			
DOCUMENT TYPE:		#001	
6	🕗 Submi	t እ Skip	🖉 Cancel

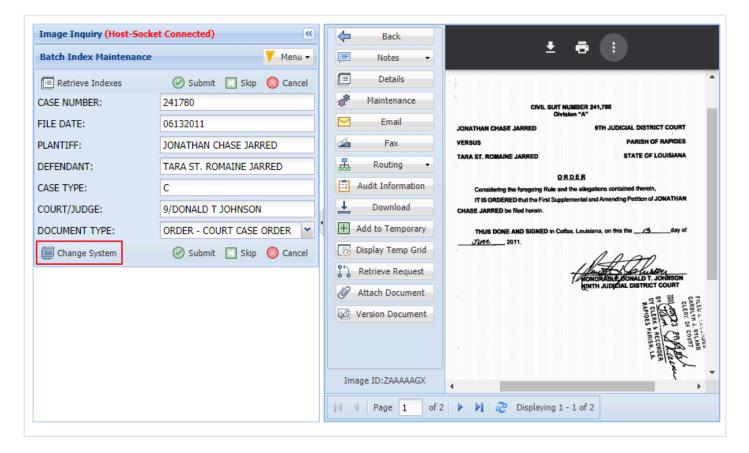
#### WorkBasket:

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

# 8.5.3. Change System

Allows the user to reassign the current image in the batch indexing window to a different system.

This function is available in Image Inquiry/Functions/Batch Indexing .



Change System		×
System 🔺	System Name	
A	AP WORKFLOW SYSTEM	-
В	BANKING DDA SYSTEM	
С	COURT SYSTEM	
D	AP SYSTEM	

# 8.6. Drag Drop/Import

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

One Look provides the user with the option to Drag Drop into the RVI PC Viewer or Browse Import.

1	One Look requires the RVI PC View	<u>wer</u> for drag drop. The	e RVI PC Viewer must be
		Connected: IBM DATA QUEL	
	Connected: IBM DATA QUEUES		for drag drop.
	If you are using Browse Import, the	RVI PC Viewer is no	t needed.
	The One Look browser must be Ho		
	Image Inquiry (Host-Socket Connected)	« for d	an drap and browce import
			ag drop and browse import.

Refer to <u>Setup/Maintain IBMi Host Socket</u> under *How To Instructions* section for details on workstation configuration when using Host Socket.

#### Drag Drop Into the RVI PC Viewer:

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

BC/OCR

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)

#### Browse Import:

- 1. From the One Look browser select Functions-Drag Drop/Import Functions. Select an index method:
  - a. Browse Import (Indexes Above)
  - b. Browse Import (Batch)
- Drag and drop a file(s) into the browse import window or click Add Files then navigate to the file(s) and click Open.
- 3. Click Start Upload.

## 8.6.1. Drag Drop (Indexes Above)

One Look requires the <u>RVI PC Viewer</u> for drag drop. The RVI PC Viewer must be

Connected: IBM DATA QUEUES

The One Look browser must be Host-Socket Connected

Image Inquiry (Host-Socket Connected)

Refer to <u>Setup/Maintain IBMi Host Socket</u> under *How To Instructions* section for details on workstation configuration when using Host Socket.

Connected: IBM DATA QUEUES

~

- 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).

Image Inquiry (Host-Socke	t Connected)		<	
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A JONES			]	
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🔎 Search 🔯 I	Functions -	🔗 Clear		
4	Scan Functions	Þ		
	Drag Drop/Import Func	tions 🕨	<b>÷</b>	Drag Drop (Indexes Above)
Es	Batch Indexing		<b>_</b>	Drag Drop (PC Viewer Indexes)
676 1	Additional Index Filter Advanced Search		5 5	Browse Import (Indexes Above) Browse Import (Batch)

# 8.6.2. Drag Drop (PC Viewer Indexes)

One Look requires the <u>RVI PC Viewer</u> for drag drop. The RVI PC Viewer must be

<b>Connected: IBM DATA QUEUES</b> The One Look browser must be <b>Ho</b> s	Connected: IBM DAT	
Image Inquiry (Host-Socket Connected)	×	
Refer to <u>Setup/Maintain IBMi Host S</u> workstation configuration when usin		structions section for details on

- 1. Open the RVI PC viewer.
- 2. Drag drop a file onto the RVI PC viewer.

- 3. Click the BC/OCR button to index the file.
- 4. Click the CLOSE button when indexing is finished.

🕺 RVI Image S	ystem 9															—		×
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BC/OCR Rea	ady		Documer	nt 1 of 1		C:M	RVI\IMP	\85CC0	1.pdf				Con	necte	d: IBM	DATA QL	JEUES S	ocket

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

Image Inquiry (Host-So	cket Connected)	(	~	
Index Search		V Menu	•	
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1	Scan Function	is 🕨	Γ	
	Drag Drop/Im	port Functions 🕨	÷	<ul> <li>Drag Drop (Indexes Above)</li> </ul>
	Batch Indexin	g	Ę	Drag Drop (PC Viewer Indexes)
	Additional Ind Advanced Sea		5	_

# 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).

Image Inquiry (H	ost-Socket Connected)	
Index Search	🗸 м	1enu 🚽
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ANNA SMITH		
S		
A JONES		
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From Date	To Date	
Search	🕅 Functions 🗸 🔗	Clear
	Scan Functions	
	Drag Drop/Import Functions	Drag Drop (Indexes Above)
	Batch Indexing	Drag Drop (PC Viewer Index
	Additional Index Filter	Browse Import (Indexes Abo
	Advanced Search	Browse Import (Batch)

3. Click the **Add Files** button or drag drop files directly onto the window.

Import Drag-Drop / Browse	-Import	×	
RVI Select files	S upload queue and click the start button.		
	🦻 Open		×
	$\leftarrow$ $\rightarrow$ $\checkmark$ $\bigstar$ This PC $\Rightarrow$ Documents $\checkmark$ $\eth$ $\sim$	Search Documents	
	Organize 🔻 New folder		?
	Stropbox ^ Name	Date modified Ty	ype 🔨
	<ul> <li>OneDrive</li> <li>16794542.pdf</li> </ul>	7/29/2020 10:13 AM A	dobe
	8 McKenzy Fonter Cannon Driver Information.PNG	5/6/2020 9:10 AM P	NG F
	This PC	2/17/2020 8:54 AM C	Comp
• Add Files	Libraries	10/7/2020 2:20 PM	Aicros Y
	File name: 16794542.pdf V All	Files (*.*)	$\sim$
		Open 😽 Cancel	

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

Import Drag-Drop / Browse-Import	×
RVI Select files Add files to the upload queue and click the start button.	
<b>pdf</b> 16794542.p 263 kb	
• 1 files queued • Start Upload •	% 263 kb

# 8.6.4. Browse Import (Batch)

From Image Inquiry:

1. Select Functions, Drag Drop/Import Functions, **Browse Import (Batch)**.

Image Inquiry (Host-	Socket Connected)	
Index Search	V Menu	-
Z-COURT DOCUMENT	<b>FS AND EXHIBITS</b> 🔚 Change System	n
CASE NUMBER		
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From Date	To Date	9
O Search	😰 Functions 🗸 🔗 Clea	r
	🖾 Scan Functions	
	Drag Drop/Import Functions	Drag Drop (Indexes Above)
	🗄 Batch Indexing	Drag Drop (PC Viewer Indexes)
	Additional Index Filter	Browse Import (Indexes Above)
	Advanced Search	Browse Import (Batch)

2. Click the **Add Files** button or drag drop files directly onto the window.

Import Drag-Drop / Browse	e-Import	×
RVI Select file Add files to the	e upload queue and click the start button.	
	🦻 Open	×
	$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\blacksquare$ $\diamond$ This PC $\diamond$ Documents $\checkmark$ $\circlearrowright$	$ \mathcal{P} $ Search Documents
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	8 McKenzy Fonter Cannon Driver Information.PNG	5/6/2020 9:10 AM PNG F
	This PC	2/17/2020 8:54 AM Comp
• Add Files	Libraries	10/7/2020 2:20 PM Micros
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		Open 🔻 Cancel

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

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4. Select Functions, Drag Drop/Import Functions, **Batch Indexing**.

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					Dou	ble click a	record to vi	ew the docu	iment.		
From Date To Date											
✓ Search         Image: Constructions →         Image: Construction →         Image:		Use the left-hand pane to index the document.									

## 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 <u>RVI 90 IBMi User Manual</u>.

# 8.8. Document Tabbing

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

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

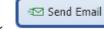
# 8.9. Email

1. Double click a record to view the image.

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

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

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



4. Click

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

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

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

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



# 8.10. Export To Excel

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

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To export an individual spool file report to Excel, see <u>Search and Extraction</u>

# 8.11. Fax

Fax the document being viewed.

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

# 8.12. File Import

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

# 8.13. Image Inquiry

To watch a video on this topic CLICK HERE.

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

Image	Image Inquiry									
Image	Systems V Menu	•								
Total S	ystems: 42									
Syst	System Name									
0	AF CASH RECEIPT	1								
1	IMPORTED MIQ DATA									
2	AF ACTIVITY/JOURNAL									
3	ADMISSION IMAGES									
5	AF GRANT ITEMS									
6	INVOICING									
7	DEMO SYSTEM FOR JDE INTERFACE									
8	MCKENZY - DOCUMENTATION SYSTEM									
9	AP DYNAMICSAX									
А	AP WORKFLOW SYSTEM									
В	BANKING DDA SYSTEM									
с	COURT SYSTEM									
D	AP SYSTEM									
Е	AR SYSTEM									

- 2. Input the desired index information to narrow down the search. Wildcard searches are allowed.
- 3. Click the Search button.

Image Inquiry	«	D-A	P SYSTE	м						@?¢
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D-AP SYSTEM	Change System		Flags	VENDOR #	COMPANY	DATE	DOCUMENT TY	ТҮРЕ	CREATE-DATE	PAGES
VENDOR #			riags							
r*			NR	0276	REAL VISION S	01/25/2011	PURCHASE OR	IMAGE	2013/06/06	001
DATE			R L	0276	REAL VISION S	01/31/2011	INVOICE	IMAGE	2013/06/06	001
				0276	REAL VISION S	02/03/2011	CHECK	IMAGE	2013/06/06	001
DOCUMENT TYPE	*			0276	REAL VISION S	02/03/2011	DELIVERY	IMAGE	2016/01/27	001
From Date 🖸 To Date										
Show Deleted Records										
Search 2 Functions -	🔗 Clear									

A subfile list matching your search criteria will appear in the right window pane. The subfile list can be sorted and grouped using the options under each column. Column selections can be enabled and disabled as needed. Mouse over to the right corner of the column then click the drop down arrow.

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	] R L	0276		Columns 🕨	/31/2011	INVOICE	IMAGE	2013/06/06	001					
	]	0276		Columns ,	/03/2011	CHECK	IMAGE	2013/06/06	001					
	]	0276		Group by this field	/03/2011	DELIVERY	IMAGE	2016/01/27	001					
				Show in groups										

### This is an example of **Sorting**.

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	riags				₫Ť	Sort Ascending							
		321	DUNDER MIFFLIN	12/22/2010	Ă↑	Sort Descending	IAGE	2018/10/10	001	<b>^</b>			
	You c	an also click	on the 🖊	12/22/2010		Columns	IAGE	2011/01/12	001				
	heade	er to switch b	oetween 🖊 👘	11/13/2019		Columns	IAGE	2019/11/13	001				
	ascen	11/13/2019	-	Group by this field	IAGE	2019/11/13	003						
	sort.		10/25/2019		Show in groups	IAGE	2019/10/25	002					
		121	SAYES OFFICE	10/25/2019	V	WORKFLOW CH I	MAGE	2019/07/30	001				

## This is an example of **Grouping**.

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	-	7284	WEB CONFERE				VOICE	IMAGE	2018/10/24	001		
	MPANY	: VIRTUAL PRIN	г									
		IMPORT	VIRTUAL PRINT	г	05/03/2021	EΝ	IAIL PRINT	IMAGE	2021/05/04	001		

This is an example of **Column Selection**.

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	L	03210	SUTHERLAND L	0	FII	LE		IMAGE	2018/06/19	001	
		IMPORT	SEND TO RVI	0	CR CR	EATE-DATE	СН	OEM	2021/05/04	001	
		IMPORT	SEND TO RVI	0		EW-DATE	СН	OEM	2021/05/04	001	
	L	GENESIS	SEABULK TOWI	0	V PA	GES		OEM	2018/11/14	001	
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		121	SAYES OFFICE	0.	w W	ORKBASKET USER		IMAGE	2019/10/21	001	
		121	SAYES OFFICE	1	CR CR	EATED BY USER	SCL	IMAGE	2019/10/25	002	
		121	SAYES OFFICE	1	СН	IECKED OUT	CH	IMAGE	2019/07/30	001	
		121	SAYES OFFICE	1	RA	W DOCUMENT TYPE	UE	IMAGE	2019/11/13	001	
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		121	SAYES OFFICE	05,	103/2020			OEM	2020/03/09	001	

# 8.14. 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 TIF images.

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

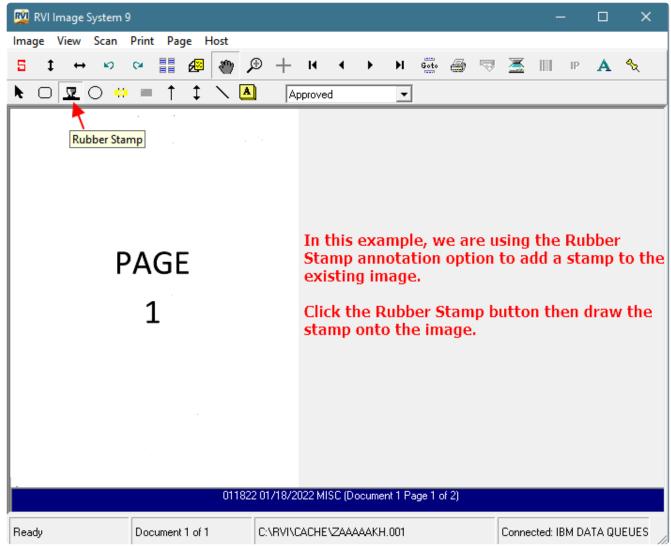
Access to Markup and Redaction options are controlled through the <u>Security/Internet Menu</u> on the IBM i. Image Markup preferences are set inside the RVI PC Viewer <u>Display Properties</u>.



	Allows the user to select an annotation object to move, resize, or delete.
	Draw a rectangle around an area of an image.
	Draw a stamp value on an area of an image. The values available are listed in the Stamp Values drop down list.
	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.

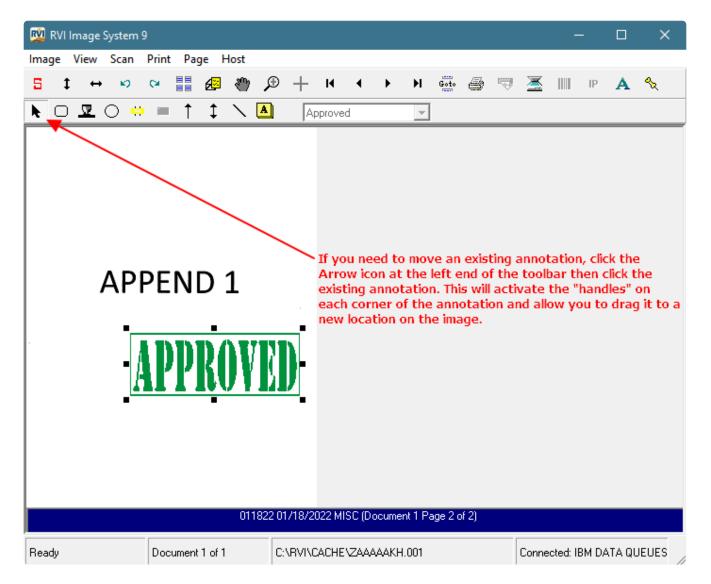


### To Modify a Markup:

Click the Select Cursor Tool
 modifications and deletions.

**)**, th

, then click on the existing markup and make any needed



#### To Save a Markup:

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

🕺 RVI Image System 9										
Image Scan Host										
Preferences	Ctrl+O	<b>D</b>	+	H		•	Ы	Goto	B	-
Use Internet Frame	Ctrl+I							[+++]		
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				)o not	promp	t (Defa	ults to '	Yes)		

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

## 8.15. Index Maintenance

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

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

Back			Options Processing	»
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When you are ready to save the changes, click the **Update** button.

# 8.16. Linking

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

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

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

• The system will display L next to the record.

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	NRL	FREDDS01XX		0000001	D0C3			IMAGE	2018/08/28	006

### Two options to access Linking:

### **Option 1:**

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

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

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

### Option 2:

• Right-mouse click the record, select Linking to view the list of systems with linked documents. Select a system in the list to leave this system and connect to the linked system. All images for the selected system linked to the primary image will be listed at the bottom of the screen.

Example: System D was selected so the Link Information at the bottom of the screen shows System D

#### documents linked to the primary document in the display window.

Image Inquiry		«	1-IMPORT	ED MI	Q DATA								0?¢	
Index Search		🚩 Menu 🗸		Page	1 of 1 🕨		Displaying 1 - 1	of 1		🔄 Retrieve R	equest 🔀 Dis	play Checked 📃 🛙	Display Options 🗸	
1-IMPORTED MIQ	DATA 📃 Ch	ange System			LOAD#	ORDE	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES	
fredds01xx			Flags											
ORDER#			NRL		FREDDS01XX		0000001	D0C3			IMAGE	2018/08/28	006	
PRO#				Ê	Show Notes									
DOC TYPE		~	4	Ð	Add Notes									•
INDEX 8					Email Image									
				0	Index Details									
INDEX 9				<i>@</i>	Index Maintena	nce								
From Date	To Date			Ð	Show Routing									
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🛞 Close				62										
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(AP SYSTEM)	(DOCUMENT	TYPE)	(VENDOR #)		Download		(DATE)		0		0	0		
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• Double-click any item in the list to view the document.

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

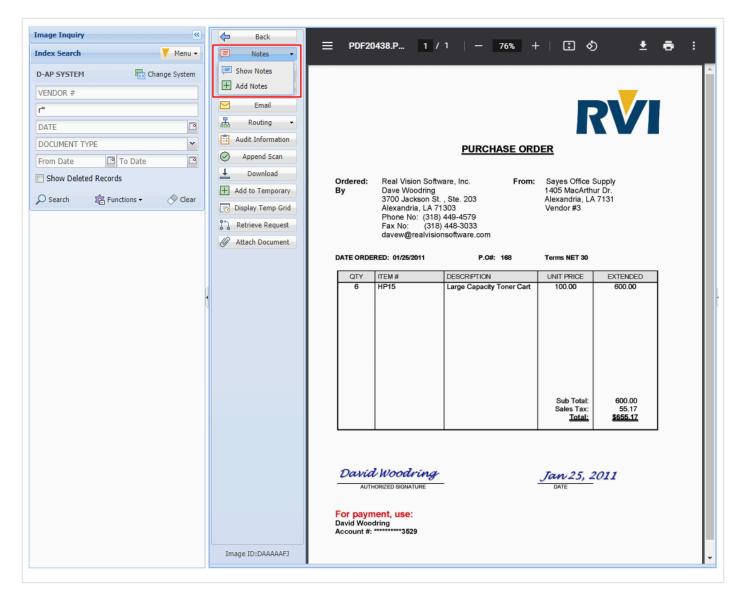
## 8.17. Notes

Notes can be added by right-clicking or double-clicking a record.

### **Right-Clicking to Add Notes**

1		Page 1 of 1	🕨 🕅 ಿ Display	ring 1 - 4 of 4	ູໃ 👌 Re	trieve Request 🛛 🔽	Display Checked	Display Options
	Flags	VENDOR #	COMPANY	DATE	DOCUMENT TYPE	ТҮРЕ	CREATE-DATE	PAGES
		Show Notes Add Notes	REAL VISION S REAL VISION S REAL VISION S	01/25/2011 01/31/2011 02/03/2011	PURCHASE ORD INVOICE CHECK	IMAGE IMAGE IMAGE	2013/06/06 2013/06/06 2013/06/06	001 001 001
		Email Image Index Details Index Maintenance	REAL VISION S	02/03/2011	DELIVERY	IMAGE	2016/01/27	001

### Double-Clicking to Add Notes

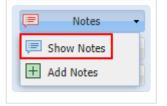


The record can be 'checked out' during the addition of notes to ensure that there are no conflicts between one or more users attempting to add notes to the same document.

Image In	nquiry	<b>«</b>	D-AP	SYST	ЕМ						0?¢	Options Process	ing	
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DATE				R			. 01/31/20	INVOICE	IMAGE	2013/06/	001			
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From Da	ate 📑 To Date	•	1	Ē	Index Deta	ails	Riaht-cli	ck or do	uble-clie	ck a recor	d to	🕗 Submit 🏥	Check Out Document	Can
Show	Deleted Records			1010	Index Mair	ntenance		ight-click or double-click a record to cess Add Notes and Show Notes.						
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0	LEN	*CHECK	ED OUT					en	try can		d or close		000000	

#### Once a Note is Added:

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



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

D-AP SYSTEM									
🕅 🖣 Page 🔟 of 1 🕨 🕅 😂 Displaying 1 - 4 of 4									
	Flags	VENDOR #	COMPANY	DATE	DOCUMENT TYPE	ТҮРЕ	CREATE-DATE	PAGES	
	NR	0276	REAL VISION S	01/25/2011	PURCHASE ORD	IMAGE	2013/06/06	001	
	RL	0276	REAL VISION S	01/31/2011	INVOICE	IMAGE	2013/06/06	001	

For a quick view of the notes, mouse over the N.

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	0		LEN	JAMIE SAYS 5 S				00/00	
	0		LEN	JAMIE SAYS FIN	AL ITEM SCHEDULE	ED TO SHIP NE	07/30/20	00/00	/00

When displaying notes in the Notes Grid, 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.

lotes Grid									
🚫 Clos	e 🛨 Add Note 🔹 Notes To Exce	Right click item for more options.							
Flags	User	Note	Entry Date	Close Date					
с	LEN	ORDER HAS NOT BEEN RECEIVED	073020	073020					
0	LEN	JAMIE SAYS 5 SHIPPED TODAY AND 1 IS ON BACK-ORDER	073020	000000					
0	LEN	JAMIE SAYS FINAL ITEM SCHEDULED TO SHIP NETWEEK.	073020	000000					
		🖉 Close Note							
		🗙 Delete Note							

Notes can be exported to an excel spreadsheet using the **Notes To Excel** button.

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				3 4 5 6	LEN LEN	JAMIE SAY	S NOT BEEN	Note I RECEIVE D TODAY / M SCHEDU	ED AND 1 IS ON BACK-0	ORDER	Entry 073020 073020	y Date	073020 000000	

# 8.18. OCR

RVI 9.0 offers free Optical Character Recognition (OCR) within the RVI PC Viewer version 9.0.85 or newer. The current OneLook browser interface allows customers to search existing OCR'd documents. For new documents that need to be OCR'd, the OCR process will require the IBMi green screen and the V9 RVI PC Viewer.

For details on how to use the RVI PC Viewer OCR capabilities, refer to RVI 9.0 OCR Capabilities.

# 8.18.1. OCR Word Search

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

1.	Select the	Functions - button.	
		OCR Word Search	
2	Salaat tha		but

2. Select the

button.

mage Inquiry		~
Index Search		Menu 🗸
Z-COURT DOCUME	NTS AND EXHIBITS	🗐 Change System
CASE #		
FILE DATE		
PLANTIFF		
DEFENDANT		
CASE TYPE		
COURT/JUDGE		
DOCUMENT TYPE		
From Date	To Date	e 📑
Enter Search Wor Select for ANE Search Search Search Search Search	Vord 1 Word 2 Word 3 Word 4	
Close Word Search		

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

# 8.19. PC Screen Scrape

Screen Scrape using Chrome requires an add-in. For instructions, click <u>HERE</u>.

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 <u>System Distribution Directory</u>

#### PC Screen Scrape Setup:

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

#### REAL VISION IMAGE MENU

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 Selection or comman ===> <u>12_</u>	Help Available d	90 =Signoff
===> <u>12</u>		

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

6. Option 1 Maintain Screen Scrape Profiles (Manual)

#### REAL VISION SCREEN SCRAPE

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

F3 =Exit Selection or Command ===> 1	Help Available	90 =Signoff

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
X =Select	Shoot Maintenance Image System	Unique Screen Identifier
COURT400 DEANTEST DYNAMICS FRESCHEB HRWEB HR400 INSURANCEN INSURWEB INSUR400	C-COURT SYSTEM 1-IMPORTED MIQ DATA 9-AP DYNAMICSAX B-BANKING DDA SYSTEM U-HR WORKFLOW SYSTEM U-HR WORKFLOW SYSTEM I-INSURANCE SYSTEM I-INSURANCE SYSTEM I-INSURANCE SYSTEM	01 037 CIVIL SUIT INQUIRY 01 001 Hopewell City 01 001 DYNAMICS 02 045 PT_WINV 04 017 Human Resources Applicationx 03 028 Employee Inquiry 05 002 Demo Insurance 04 014 Insurance Application 02 003 Demo Insurance
MEDICALWEB MEDICAL400 Page Up =Prev	I-INSURANCE SYSTEM 7-DEMO SYSTEM FOR JDE H-MEDICAL SYSTEM H-MEDICAL SYSTEM ious Page F10 =Add =Add New PC Profile	09 006 Insurance Application 01 001 JDEMESS 04 014 Medical Application 03 028 ENCOUNTER HISTORY + New Profile Page Down =Next Page F8 =PC PreScrape Maint Enter =Continue

8. Specify a Screen Scrape Profile Name

Screen Scrape Profile Maintenance Screen

(c)Copyright RVI 1992, 1999 SCR005FM/FORMAT1

This Program Allows You To Enter And Update Screen Profiles

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

Screen Scrape Profile Name: ACC

F3 =Exit

Enter =Continue

9. Select an Image System Code

Image System	m Selection Screen	(c)Copyright RVI 1992, 1999
		SCR005FM/CATLSTSF
Select Image	System By Typing An X Next To Th	ne 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	
<u>x</u> 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 -No F3 =Exit	ext Page F12 =Cancel	Page Up -Previous Page Enter =Continue

10. F3 to exit the Screen Scrape Profile Maintenance Screen

Screen Scra	pe Layout/Maintenance	e Screen	(c)Copyright	RVI 1992, 1999
		<u>Image System</u>	Description	SEGMX
Screen Pro	file: ACC Z	COURT DOCUMENTS	S AND EXHIBITS	
	F1=STARTING POSITION	4		
Line	1+10+20	9+30+.	40+50	+60+.
000000001	Real Vision Software	e, 8.0 - Internet	t Explorer	
000000002	-			
000000003	<] var rvisb = "N"	'; function apfur	nct(na) {    if (rvi:	sb == "N") { d
000000004				
000000005				
000000006				
000000007				
000000008	Real Vision Imagi	ing System		
000000009	Legal Applicati	ion		
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		
<u>X</u> <u>Profile</u>	<u>Image System</u>	<u>Unique Screen Identifier</u>
		11 001 Alexandria County Court
	A-AP WORKFLOW SYSTEM	
	2-ACCUF ACTIVITY/JOURN	
	O-ACCUFUND ACCOUNTS PA	01 001 ACCUFAPINV
_ ACCUFARINV	P-ACCUFUND A/R SYSTEM	01 001 ACCUFARINV
_ ACCUFCR	0-ACCUFUND CASH RECEIP	
	4-ACCUFUND GRANTS	01 001 ACCUFGRANT
_ ACCUFGRITM	5-ACCUFUND GRANT ITEMS	01 001 ACCUFGRITM
_ ACCUFPOINV		
	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 +
	-	New Profile Page Down =Next Page
F3 =Exit F6	=Hdd New PC Profile	F8 =PC PreScrape Maint Enter =Continue

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

PC-S	crape Text Fil	e Selection			(c) Conu	right 2008, RVI
Opti			ed From Most Re	ecent To		RVPSLSFM/SFLCTL
		3 or F12 To L		ecent io	oluesi	NVF SEST M7 ST ECTE
× =	Select r	'S OF FIZ 10 U	ISE PUS.IXI			
0	<b>F</b> :1. No.	Data Grantad	<b>Fig. 4</b> 1 is a <b>T</b> a	F:1.		
<u> </u>			<u>First Line In</u>	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 Onel ool	k IRMiCle	nud Fix -	Compatibilit
x	MONTY.TXT	2018/09/20				ernet Explorer
_				ultwale,	0.0 - 111	ernet Explorer
-	0106500.TXT	2018/09/13	30			
_	0106501.TXT	2018/09/13	ACCUFAPINV			
						More
Page	Up/Down =More	e Files	ENTER =Continu	ue		F12 =Cancel

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

Screen Scrape Profile Maintenance Screen	(c)Copyright RVI 1992, 1999
	SCR005FM/FORMAT1

This Program Allows You To Enter And Update Screen Profiles

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

Screen Scrape Profile Name: ACC\_\_\_\_\_

F3 =Exit

Enter =Continue

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

Screen Scra	pe Layout/Maintenance Screen (c)Copyright RVI 1992, 1999
	Image System Description SEGMX
Screen Pro	file: ACC Z COURT DOCUMENTS AND EXHIBITS
	F1=STARTING POSITION
Line	1+10+20+30+40+50+60+.
000000001	Real Vision Software, 8.0 - Internet Explorer
000000002	
000000003	<pre>&lt;] var rvisb = "N"; function apfunct(na) { if (rvisb == "N") { d</pre>
000000004	
000000005	
000000006	
000000007	
00000008	Real Vision Imaging System
00000009	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 Selec	
From 1-7 Or Use 8 To Select The Unique screen ide	
Image System - <u>Z</u> <u>COURT DOCUMENTS AND EXHIE</u>	BITS
1. CASE #	
2. FILE DATE	
3. PLANTIFF	
4. DEFENDANT	
5. CASE TYPE	
6. COURT/JUDGE	
7. DOCUMENT TYPE	
Index Number 1-99: <u>0</u> 0 = Screen Uniqu	le Identifier
_	
Starting Position: 6	
Ending Position: 22	
Length: 17	
Line: 9	

Enter =Continue

#### PC Screen Scrape Test:

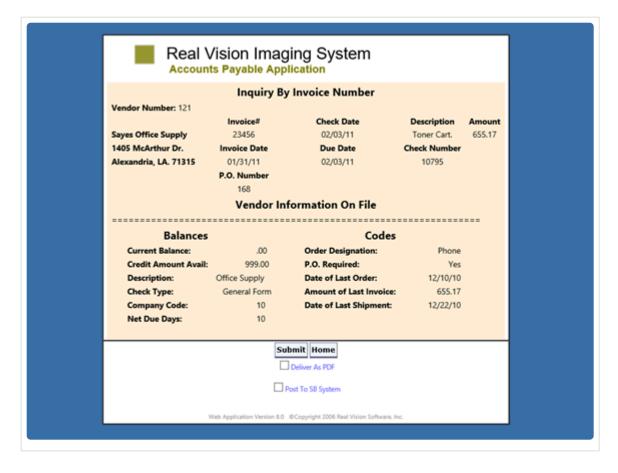
- Open One Look in Internet Explorer
- · Navigate to the desired pc screen to be captured
- Press CTRL+SHIFT+F5 to capture the screen

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.

age Inquiry		~	Awa	aiting System Selection				0 ?	? 🕫
ndex Search		Venu •	14	4 Page 1 of 1	🕨 🕅  Displaying 1 - 3 of 3		Display Chec	ked 🔚 Show Row Numbers 🔀 Grid to Ex	ccel
		🗐 Change System		Flags	VENDOR #	DATE		CUMENT TYPE	
ENDOR #:	121				×		×	×	
DATE					121	01/25/2011		RCHASE ORDER	
DOCUMENT TYP	-				121	01/31/2011		VOICE	
					121	02/03/2011	OH	ECK	
From Date	To Date								
Search	E Functions •	🖉 Clear							
			1						
			t						
			t						
			ł						
			1						
			1						
			1						
			1						
			•						
			•						
			•						
			•						
			t						
			t						
			t						
			t						
			1						
			t						
			(PD	NP)	Device Id:50	0099461 User Id: MONTY		© Real Vison Software, All Rights Reserv	ved.
			(PD	×)	Device Id:50	0099461 User Id: MONTY		② Real Vison Software, All Rights Reserv	ved.

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

# 8.20. Polling

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

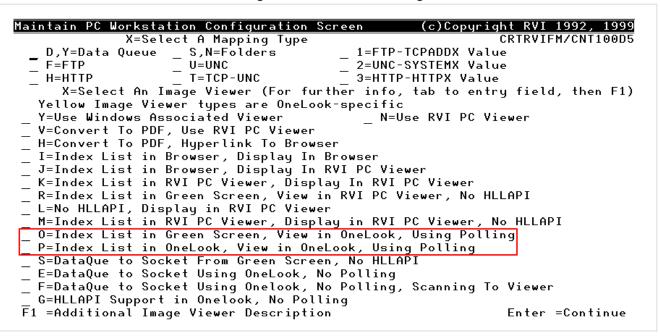
Use with minimal users; otherwise, system performance will be affected.

To watch a video on this topic CLICK HERE

#### **IBM i Configuration:**

- 1. From an IBM i command line, with RVILIB in your library list, type GO IMAGE
- 2. Select Option 8 Maintenance Menu
- 3. Select **Option 7** Maintain PC Workstation Configuration

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



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

#### If Image Viewer = O

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

#### If Image Viewer = P

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

#### One Look Configuration:

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

				]	Image Inquiry (Host Connected)	
					Index Search	
					Z-COURT DOCUMENTS AND EXHIBITS	🗐 Ch
Image Inquiry (I	Host Connected)		«		CASE #	
Image Systems	;	V Menu -	~		FILE DATE	
Total Systems: 1					PLANTIFF	
System 🔺	System Name				DEFENDANT	
а	TEST SYSTEM	•			CASE TYPE	
b	PRO DOCUMENTS				COURT/JUDGE	
c	CASINO DEMO				DOCUMENT TYPE	
					From Date 🖸 To Date	
					🔍 Search 🛛 🖓 Functions 🗸	
				1		

### 8.20.1. Scan With Polling

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

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

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

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

Image Scanning Index D	efinition Scre	en	(c) Copyri	ight 2005, RVI
This Program Allows Page Up Or Down For			mages Being	
	COURT DOCUMENTS	S AND EXHIBITS		
CASE # FILE DATE PLANTIFF DEFENDANT CASE TYPE COURT/JUDGE DOCUMENT TYPE		<u>050318</u> 04/03/17 J JACKSON K LYN 0 DAVIS PETITION		
F3 =Exit F12 =Cancel	F11 =Upload	PageUp/Down =Ado	dl Idxs E	Enter =Continue
м <mark>А</mark> В				10/041

ndex Search		🔻 Menu 🗸			Page 1	of 1 🕨 🕨	👌 👌 Display	ring 1 - 1 of 1	Display C	hecked 👌 🚍 S	Show Row Numl
Z-COURT DOCUME	NTS AND EXHIBITS	🗐 Change System		Fl	CASE #	FILE DATE	PLANTIFF	DEFENDA	CASE TYPE	COURT/J	DOCUME
CASE #:	050318										
FILE DATE:	04/03/17			L	050318	04/03/17	J JACKSON	K LYN	0	DAVIS	PETITION
PLANTIFF:	J JACKSON										
DEFENDANT:	K LYN										
CASE TYPE:	0										
COURT/JUDGE:	DAVIS										
OCUMENT TYPE:	PETITION										
From Date	To Date		1								
C Search	E Functions -	🖉 Clear									
, ocarear		<u>(v</u> 0.001									
					Device Id:	\$00096493 U	ser Id: MCKENZ	Y	© Real Vison S	oftware. All Rid	ghts Reserved.
											]

### 8.21. Previous Versions

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.

Z-CO	OURT DO	DCUMENTS AN	DEXHIBITS					ې ج	
🛛 🗐 Page 1 of 1 🕨 🕅 🐉 Displaying 1 - 1 of 1					🖾 Retrieve Request 🛛 Display Checked 🗮 Display Options 🗸				
	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE	
	v	031619	01/29/2019	V VERSION	P VERSION	0	J MILES	JUDGEMENT	

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

#### OR

• Double-click the desired record for the version you want to display.

Image Inquir			•	Back	] .	1	×				
Index Search	Menu ·		È N	otes 👻			•			121-3	ptior
Z-COURT DO	CUMENTS AND EXHIBITS	Ch	() D	etails						2.14	Options Processing
031619			🗿 Mair	tenance							Cess
FILE DATE			<b>⊠</b> €	imail			CIVIL SUIT	NUMBER 241,780			Đ
PLANTIFF			Ro	uting 👻		JONATHAN C	HASE JARRED		DISTRICT COURT		
DEFENDANT			🛋 Audit I	nformation		VERSUS			RISH OF RAPIDES		
CASE TYPE			+ Appe	end Scan		TARA ST. RO	AINE JARRED	STA	TE OF LOUISIANA		
COURT/JUDO	GE		🚊 🛛 Add F	Redaction			FIRST SUPPLEMENTA	AND AMENDING PETITI	<u>DN.</u>		
DOCUMENT	ТҮРЕ	1	Previo	is Versions				l			
From Date	To Date	3		wnload				inal Petition for Divorce an as may be inconsistent here			
O Search	Eg Functions 🔹 🖉 Clear		Display	Temporary Temp Grid ve Request		adding paragra	uph 19 to read as follows: The defendant has recen	II. end his Petition for Divorce *19. tty exhibited volatile and	erratic		
			Image ID:	ZAAAADTX				and your petitioner shows ast of the children for the C		~	
					~ ~	•					*
View Previou	s Versions										
🚫 Close 📃 🗤	View Original Version										
Sequence	User Name	Path Nar	me		Date		Time		Page Vers	sioned	
001	MCKENZY	I:\IMAG	E/MCKENZY		01/29/19		15:41:04		001		
002	MCKENZY	I:\IMAG	E/MCKENZY		01/29/19		15:55:46		001		

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

# 8.22. Print

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

mage Inquiry		~	K Back
Index Search		V Menu -	🖹 Notes 🗸
Z-COURT DOCUMENTS AI	ID EXHIBITS	🔲 Change System	(i) Details
241780			Maintenance
FILE DATE			🗹 Email
PLANTIFF			Routing -
DEFENDANT			Audit Information
CASE TYPE			+ Append Scan
COURT/JUDGE			+ Add to Temporary
DOCUMENT TYPE			
From Date	To Date		
	Functions -	🖉 Clear	

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

🞯 RVI Ima	age System 8			- 🗆 ×
Image Vi	ew Scan Print Page	Host		_
5 t		ب + 🔍 🍘 😣	<ul> <li>Image: A marked black</li> <li>Ima</li></ul>	5 🤜 A 🔨
× 0 1	Z () 🔅 = 🕇	1 🔪 🔺 🛛 🗛	oved 💌	
ouro and appears That he is abgetose, internation ( paragrees 10	<b>BEFERRATION</b> The indexinguest authority <b>CONSTRAIN</b> The indexinguest authority <b>CONSTRAIN</b> The indexinguest authority <b>CONSTRAIN</b> The protocome is the automa constrained matching and that all all automa automatics to the test of the transmission automatic automatics in the test of the transmission automatic a			
-	AND ANY PRAME (CONTROL OF ANY PRAME ANY PRAME (CONTROL OF ANY PRAME ANY PRAME (CONTROL O	03/15/2017 GARNISHME1	NT (Document 1 Page 1 of 2)	
BC/OCR	Ready	Document 1 of 2	C:\RVI\CACHE\1AAAL3JT.00	1 Not Connected

# 8.23. Print To RVI

1	One Look requires the <b>RVI PC Viewer</b> for print to rvi.
•	The RVI PC Viewer must be Connected: IBM DATA QUEUES
	The One Look browser must be Host-Socket Connected
	Image Inquiry (Host-Socket Connected)
	Refer to <u>Setup/Maintain IBMi Host Socket</u> under <i>How To Instructions</i> section for details on workstation configuration when using Host Socket.

- 1. Open the RVI PC viewer (<u>RVI.EXE</u>) and One Look browser.
- 2. Open the file you want to print to RVI.

3. Select File/Print.

#### 4. Select Send To RVI PC Imaging.

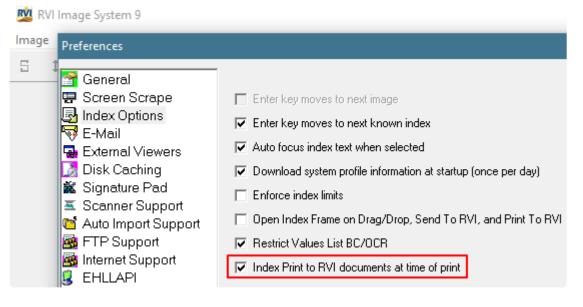
\* If Send To RVI PC Imaging is not listed as a printer, install the printer driver included in the RVI PC Viewer installation or by going to the <u>Support Downloads</u>.

	utes for Thursday, June 4, 2020 - Adobe Acrobat Reader DC (32-bit)	_		×
File Edit View Sign Home Tools	Supreme Court Mi ×	Ļ.	Sign	In
🖹 🕁 ଡ		0		20
			^	0
				B
	Print X			
	Printer: Send To RVI PC Imaging  V Properties Advanced  Help ①			
	Copies: 1 Print in grayscale (black and white) Save ink/toner (1)			R
	Pages to Print Scale: 100%			<b>P</b>
	All Ourrent Pages     More Options			<b>B</b>
	Page Sizing & Handling ①			č0
•	Size         Poster         Multiple         Booklet         Memory and tables         Memory and tables		1	还
	Fit     Actual size     Shrink oversized pages     Custom Scale:     100 %			1
	Choose paper source by PDF page size			n
	Orientation:			0
	Auto     Portrait     Landscape			Cu
	Comments & Forms			G
	Page 1 of 1			<i>₽</i> ~
	Page Setup Print Cancel		~	→

Based on the configuration, the user may get a RVI Index Values pop up allowing them to index the document at print time.

阙 RVI Index Values	×
SYS. CODE Z · COURT DOCUMENTS AND EXHIBITS	▲ ОК
CASE NUMBER	Cancel
1202712	
FILE DT	
02172021	
PLANTIFF	
E MAYS	
DEFENDANT	
W REED	
CASE TYPE	
С	
COURT/JUDGE	
P/J RILES	
DOCUMENT TYPE	
STATEMENT	
	<b>▼</b>
Extract Words for Fulltext Processing	
Open document after processing	
🔲 Separate EMail Attachments	

The RVI Index Values pop up is controlled by the RVI PC Viewer check box found under *Image/ Preferences/Index Options/Index Print to RVI documents at time of print* 



5. Verify the

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

means the document was printed to RVI and is waiting to be uploaded.

- 6. From One Look, select an index method:
  - a. Drag Drop (PC Viewer Indexes)
    - Use this option if you indexed the document using the RVI Index Values pop up.
  - b. Drag Drop (Indexes Above)

Use this option if you want to index the document using the One Look browser.

Image Inquiry (Host-Socke	t Connected)	«
Index Search		Menu 👻
Z-COURT DOCUMENTS AND	EXHIBITS 🚮 Change	System
CASE NUMBER		
FILE DT		
PLANTIFF		
DEFENDANT		
COURT/JUDGE		
DOCUMENT TYPE		~
From Date	<sup>10</sup> To Date	
🔎 Search 🔯 I	Functions -	Clear
4	Scan Functions	Þ
	Drag Drop/Import Functio	ns 🕨 +
Es	Batch Indexing	Ę
670	Additional Index Filter	
	Advanced Search	

#### The newly imported will now be available for inquiry.

Image Inquiry (Host-Socket Connected)					
Index Search V Menu -					
Z-COURT DOCUMENTS AND EXHIBITS English Change System					
1202712					
FILE DT					
PLANTIFF					
DEFENDANT					
CASE TYPE					
COURT/JUDGE					
DOCUMENT TYPE					
From Date 🖸 To Date					
🔎 Search 🙀 Functions • 🔗 Clear					

	Z-C	Z-COURT DOCUMENTS AND EXHIBITS								
		🔢 4 Page 1 of 1 🕨 🕅 all Displaying 1 - 1 of 1 👌 Retrieve Request 💟 Display Checked 🔲 Display Options 🗸								
		Flags	CASE NUMBER	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE 🔺	COURT/JUDGE	DOCUMENT TYPE	
l										
П			1202712	02172021	E MAYS	W REED	С	P/J RILES	STATEMENT	
I										
l										
l										
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l										

### 8.24. Quick View

Quick View allows users to hover over a record in Image Inquiry to see a display of the record in a new frame.

To enable Quick View, click on the drop down arrow to the right side of any existing column. Select **Columns**. Enable **Quick View**.

14	4 Page	1 of 1 🕨 🕅	2	Displaying 1 - 161 o	f 16:	1	
	Flags	CASE NUMBER	-	FILE DATE		PLAINTIFF	1
	Flags		21	Sort Ascending			1
		01231976	Z↓	Sort Descending		O LANE	
		012356		Columns 🕨	-	C1/CTD 111	-
		012376					
		012376		Group by this field	V	CASE NUMBER	
		012376	E	Show in groups	V	FILE DATE	
		012376	-	P		PLAINTIFF	
		012376		P1		DEFENDANT	
		012376		P2	V	CASE TYPE	
		012376		P3			
		020120					
		020121			<b>V</b>		
	1	020121				TYPE	
		021521		021521		PATH	
		021521		021521		FILE	
		021521		NONOTES		CREATE-DATE	
		021521		NOTES		VIEW-DATE	
	N	021521		021521			
	N S	02182021		02182021			
		02182021		02182021			
		02222021				NOTES	
		02232021		02232021		SIGNATURES	
		02232021		02232021		ROUTE	
		02232021		02232021		WORKBASKET USER	
		02232021		02232021		CREATED BY USER	
		02232021		02232021			
	N	02232021		02232021			_
		030221		03022021		RAW DOCUMENT TYP	E
		030221		03022021	V	QUICK VIEW	

Once the Quick View column is enabled, the user will see the new column appear in Image Inquiry. Hover over the icon under the Quick View column associated with the record you would like to view.

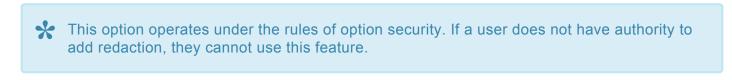
Z-COURT	T DOCUMENT	S AND EXHIBITS						0 ?	8
14 4	Page 1	of 1 🕨 🕅 🤁 Displaying	1 - 161 of 161					Display Checked 🔲 Display Options	
-	ri	CASE NUMBER	FILE DATE	PLAINTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE	s Pro
	Flags	×	×	×	×	×	×	X Quick	Cess
		01231976	02172021	O LANE	P MILES	A	E/W SPEARS	STATEMENT	* 10
		012356							
		012376	06012011	S FRYE			- + Automatic Zoom		
		012376			□	1 011	- + Automatic Zoom		»
		012376	2						
		012376	P					-	
		012376	P1						
		012376	P2						
		012376	P3						
		020120		WORD					- 88
		020121					AGE		- 88
		020121		CURRY		$\mathbf{P}$			- 88
						ы <i>Г</i>			- 88
									- 88
									- 88
									- 88
							1		- 88
							<b>_</b>		

For third party file types that are not inherently handled via the browser display, the system will automatically download the file for the user to open.

# 8.25. Redaction

To watch a video on this topic CLICK HERE

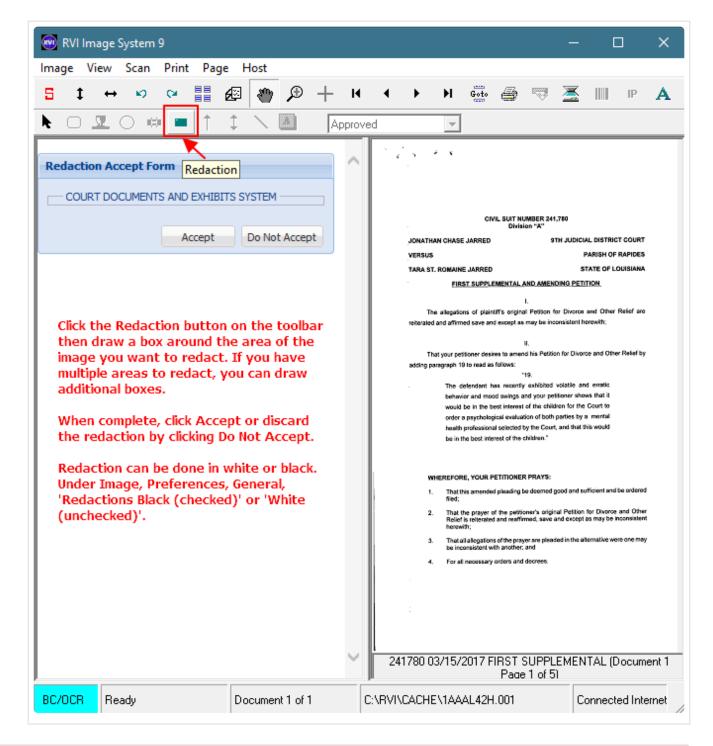
Redact an area of an image (*Image must be stored as Type B*) using an opaque highlighter from the RVI PC Viewer.



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

Image Inquiry 🔍	Back	A
Index Search Venu -	🖹 Notes 🔻	
Z-COURT DOCUMENTS AND EXHIBITS	() Details	
241780	Maintenance	
FILE DATE	Email	CIVIL SUIT NUMBER 241,780 Division "A"
PLANTIFF	Fax	JONATHAN CHASE JARRED 9TH JUDICIAL DISTRICT COURT
DEFENDANT	Routing -	VERSUS PARISH OF RAPIDES
CASE TYPE	Audit Information	TARA ST. ROMAINE JARRED STATE OF LOUISIANA
COURT/JUDGE	Append Scan	FIRST SUPPLEMENTAL AND AMENDING PETITION
DOCUMENT TYPE	Add Redaction	ا. The allegations of plaintiff's original Petition for Divorce and Other Relief are
From Date 📑 To Date 📑	Download	reiterated and affirmed save and except as may be inconsistent herewith;
🔍 Search 🛛 🖓 Functions 🗸 🖉 Clear	+ Add to Temporary	II.
	Display Temp Grid	That your petitioner desires to amend his Petition for Divorce and Other Relief by adding paragraph 19 to read as follows:
	Retrieve Request	"19. The defendant has recently exhibited volatile and erratic
		behavior and mood swings and your petitioner shows that it
		would be in the best interest of the children for the Court to order a psychological evaluation of both parties by a mental
		health professional selected by the Court, and that this would
		be in the best interest of the children."
		WHEREFORE, YOUR PETITIONER PRAYS:
	Image ID:ZAAAADKS	1. That this amended pleading be deemed good and sufficient and be ordered filed:

- 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**.

阙 RVI Image System 9								—	C		×
[mage View Scan Print Page]	Host	ы	4 1	Ħ	Cata	<u> </u>		$\mathbf{x}$		IP	٨
				-	Goto	(B)/	~~				<b>A</b>
F Select Tool COURT DOCUMENTS AND EXHIBIT Accept			VERSUS TARA ST Tectoralec Tr adding p	ROMAIN FIR: the allegation d and affirm hat your pet aragraph 10 The d behavior would order i health be in the metre POR field; That the Relief hence That the Relief	E JARRED E JARRED ST SUPPLE ins of plaint ed save and isoner desir 9 to read as be in the bit is psycholog professiona he best inte E, YOUR P his amendes he prayer o is released in the is released in the is released in the bit is	Divis CMENTAL. Iffs original es to ameri follows: as. recently id swings of ost internal ical evalual al selected inset of the ETITIONEI i and reaffi s of the press i and reaffi	AND AMEN I. al Petition 1 s may be inc it, nd his Petitio '19, y eshibited and your petition of took by the Court children." R PRAYS: be deemed increase arigination contrast arigination and and contrast arigination and and contrast arigination and and contrast arigination and and contrast arigination and and contrast arigination and contrast arises are arises arises are	the JUDICL S SUNG PETI for Divoros consistent h on for Divor volatile an efformer show deen for Divor to parties by s t, and that the parties by s t, and the parties by s t, and t, and	and Other i erewith: the and Other wis that it is Court to a mental his would ufficient and i for Divorce as may be in ternative we	RAPIDES DUISIANA Resef are r Resef by be ordered and Other consistent re one may	
J BC/OCR Ready	Document 1 of 1	C:\F	RVI\CACHE				el of 5		onnecti		

### 8.26. 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.*)

mage Inquiry	~	Back	
Index Search	Menu 🔻	🖹 Notes 🗸	□ □ □ □ □ □ ↓
Z-COURT DOCUMENTS AND EXHIBITS	5 🗐 Cł	() Details	
CASE #		Maintenance	JONATHAN CHASE JARRED 9TH JUDICIAL DISTRICT COURT
FILE DATE		🖂 Email	VERSUS PARISH OF RAPIDES TARA ST. ROMAINE JARRED STATE OF LOUISIANA
PLANTIFF		🗐 Routing 👻	•
DEFENDANT		Route To User	<u>QRDER</u> Considering the foregoing Rule and the allegations contained therein,
CASE TYPE		Route Using Profile	IT IS ORDERED that the First Supplemental and Amending Petition of JONATHAN
COURT/JUDGE		+ Add to Temporary	CHASE JARRED to filed herein.
DOCUMENT TYPE			THUS DONE AND SIGNED in Colfax, Louisiana, on this the <u>/3</u> day of <i>June</i> 2011.
From Date 🖸 To Date	•		1100
🔍 Search 🛛 🔀 Functions 🗸 🖉	2 Clear		1 Marth Jahren
			MONORABLE BONALD T. JOHRSON
	Ŭ		ER C
			PLEASE SERVE: TARA ST. ROMAINE JARRED at her home: Beau Terre Apartments 920 Twin Bridges Rd., Apl. 119 Alexandria, LA 71303 (Defendant's cell phone number is: (318) 452-1350)
			E Charamana ang Balangalan kang (ananan salahan da salah panandag ang
		Image ID:ZAAAADLE	

#### Once a document is routed:

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

14	4 Page	1 of 1 🕨 🕅 🤁 Di	splaying 1 - 3 of 3			D 🖸	isplay Checked 🛛 🗮 Show Row	r Numbers 🔀 Grid to Exce
_	Ciana .	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
	Flags	×	×	×	×	×	×	
	NR	241780	03/15/2017	E ZEND	H POTTER	с	MONTOGUE	FIRST SUPPLEMENTAL
	NS	241780	03/15/2017	E ZEND	H POTTER	с	MONTOGUE	GARNISHMENT
	N	241780	04/22/2017	E ZEND	H POTTER	с	MONTOGUE	PETITION

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

ge Inquiry (Host Connected)	« U-HR V	NORKFLOW SYSTEM				٥	? #
lex Search	V Menu - 14 4	Page 0 of 0 > >	No data to display		Display Checked	Show Row Numbers 🔀 Grid to E	Excel
HR WORKFLOW SYSTEM 🛛 🕞 Cha	workBasket	EMPLOYEE #	DATE		DEPT	DOCUMENT TYPE	
APLOYEE #	W/ Maintenance	ags	×	×	×	×	
ATE	Change Password G Sign Off			*** Ready to Search *	**		
EPT	Sign Off						
DCUMENT TYPE							
om Date 📑 To Date							
Search 🔄 Functions -	@ Clear						
Seerce E® Functions -							
	1						
	4						
	(PDF)		Device Id:\$00098658	User Id: MCKENZY	4	D Real Vison Software. All Rights Reser	rved.

# 8.27. Scan

To watch a video on this topic CLICK HERE.

- If you are using Chrome for screen scrape scanning, you must install the RVI Chrome extension for screen scrape scanning. Click <u>HERE</u> for setup instructions.
- 1. Select a system code. The scanned images will automatically be uploaded to the system code the user is currently logged into.



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

mage Inquiry		~	
Index Search	V Men	- I	
Z-COURT DOCUMEN	ITS AND EXHIBITS 🛛 🥅 Change Syste	m	
241780			
FILE DATE			
PLANTIFF			
DEFENDANT			
CASE TYPE			
COURT/JUDGE			
DOCUMENT TYPE			
From Date	To Date		
🔍 Search	🔄 Functions 🗸 🖉 Cle	ar	
	Scan Functions		Scan Using Indexes Above(Twain Scanner
	Drag Drop/Import Functions		Scan Using Indexes Above
	C Batch Indexing	8	Scan Using A Profile
	<ul> <li>OCR Word Search</li> <li>Additional Index Filter</li> </ul>	ŕ	Upload Scanned Documents

One Look requires the **RVI PC Viewer** (9.2x or newer) for scanning. Verify that the workstation is set to PC Control Scanning inside the RVI PC Viewer under Image/ Preferences/Scanner Support.

General         Screen Scrape         Index Options         E-Mail         E-Mail         Signature Pad         Scener Support         Auto Import Support         Auto Import Support         E-HLLAPI         B-HLLAPI         B-Backup original files after import         Index Options         E-HLLAPI

# 8.27.1. Scan Using Indexes Above (Twain Scanner)

Scan Using Indexes Above (Twain Scanner) is used for Twain Scanning WITHOUT the RVI PC Viewer. Twain Scanning WITHOUT the RVI PC Viewer requires RVICommunications.exe. Refer to <u>Setup RVI Communications Server</u> for further instructions.

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

Image Inquiry (nost-3	ocket Connected)	«	For Twain Scanning without the RVI PC Viewer, the RVI
Index Search	V Menu	•	Communications Server (RVI PC
Z-COURT DOCUMENT	5 AND EXHIBITS 🔤 Change System	m	Socket) must be running in the system tray, OneLook must show the socket is connected,
010941			and the RVI PC Viewer must be
01/12/2022		•	closed (if installed).
JEAN SMITH			If you are running the Host
LARRY WILLS			Socket on the IBMi as well as th RVI Communications Server (RV
MISC			PC Socket) in the system tray, OneLook will show Host-Socket
DIRE/001			Connected.
MOTION	•	~	If only the RVI Communications
From Date	To Date	•	Server (RVI PC Socket) is running, OneLook will show
Show Deleted Reco	rds		Socket Connected or PC Socket
Search	Functions •	ar	Connected.
	🖾 Scan Functions	P	Scan Using Indexes Above(Twain Scanne
	Drag Drop/Import Functions	Ð	Scan Using Indexes Above
	Batch Indexing	2	Scan Using A Profile
	Additional Index Filter	1	Upload Scanned Documents

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

Image Inquiry (Ho	ost-Socke	t Connected)	)	~		
Index Search			V Mer	nu 🕶		
Z-COURT DOCUM	ENTS AN	D EXHIBITS	🚮 Chang	e Sys		
010941						
01/12/2022						
JEAN SMITH						
LARRY WILLS						
MISC						
DIRE/001						
MOTION						
From Date		To Date		•		
Show Deleted I	Records					
Search	रि Fur	nctions -	🔗 d	ear		
	de s	can Functions		►	<b>P</b>	Scan Using Indexes Above(Twain Scanner
	2	)rag Drop/Imp	ort Function	s 🕨	<u>-</u>	Scan Using Indexes Above
	Es e	Batch Indexing			2	Scan Using A Profile
		dditional Inde	x Filter		1	Upload Scanned Documents
	P 4	dvanced Searc	ch			

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

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

One Look	(IBM i	Cloud)	- 9_en
----------	--------	--------	--------

EPSON Scan	- 🗆 ×
EPSON Scar	Mode: Professional Mode ~
Settings	
Name:	Current Setting 🗸 🗸
	Save Delete
Original	<b>^</b>
Document Type:	Reflective ~
Document Source:	ADF - Single-sided 🗸
Auto Exposure Type:	Document ~
Thumbnail Help Conf	iguration

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

Index Search 🗸 Menu 🗸		<u>ه</u>	₽	1 of 1	-	+ 60%	÷	A	Di M	»
Z-COURT DOCUMENTS AND EXHIBITS 🖷 Change Sys	the second se									<b>^</b>
010941										
01/12/2022										
JEAN SMITH										
LARRY WILLS										
MISC										
DIRE/001										
MOTION										
From Date 🖸 To Date										
Show Deleted Records					DΛ	GE				
🔎 Search 🛱 Functions 🗸 🔗 Clear	1				ГА					
	4									
						1				
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				-						
										-

If you receive the following error, the Twain setup is not being recognized.

reportion o	C 1 C 1	
	t undefined	l (reading 'send'
roperties o	r unuenneu	r (reaunity seriu
ОК		
UK		
		ок more of the follov

- Twain Driver is not installed
- <u>RVI Communication Server</u> is not installed/running in the System Tray on the pc.
- A Twain Device is not specified in the <u>RVI Communication Server</u>.

# 8.27.2. Scan Using Indexes Above

Scan Using Indexes Above is used for Kofax/ISIS Scanning with the RVI PC Viewer or Twain Scanning with the RVI PC Viewer. Refer to Setup a Scan Station for instructions.

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

Index Search Z-COURT DOCUMENTS AND EXHIBITS		Menu
		3
PLANTIFF		
DEFENDANT		
CASE TYPE		
COURT/JUDGE		
DOCUMENT TYPE		
From Date	🖸 To Date	3
🔍 Search	🎤 Functions 🗸	🖉 Clear

2. Select the button.

3.	Select	tha
υ.	OCICCI	uic

button.

▶

4. Choose Scan Using Indexes Above.

Scan Functions

mage Inquiry Index Search	V Men	»	
Z-COURT DOCUMEN			
241780			
FILE DATE		•	
PLANTIFF			
DEFENDANT			
CASE TYPE			
COURT/JUDGE			
DOCUMENT TYPE			
From Date	To Date	•	
🔍 Search	🔄 Functions 🗸 🖉 Cle	ar	
	Scan Functions		Scan Using Indexes Above(Twain Scanner
	Drag Drop/Import Functions	Ē	Scan Using Indexes Above
	Batch Indexing	8	Scan Using A Profile
	OCR Word Search	ſ	Upload Scanned Documents
	Additional Index Filter	-	

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

# 8.27.3. Scan Using A Profile

**Scan Using A Profile** is used for Kofax/ISIS Scanning with the RVI PC Viewer or Twain Scanning with the RVI PC Viewer. Refer to <u>Setup a Scan Station</u> for instructions.

Provides the user with the ability to select predefined scanning profiles for this application.



1. Select the

2.	Select the	
۷.		

Scan Functions

button.

Þ

3. Choose Scan Using A Profile.

mage Inquiry Index Search	Menu -
Z-COURT DOCUMEN	
241780	
FILE DATE	
PLANTIFF	
DEFENDANT	
CASE TYPE	
COURT/JUDGE	
DOCUMENT TYPE	
From Date	To Date
🔍 Search	E Functions -
	Scan Functions Scan Using Indexes Above(Twain Scanner
	Drag Drop/Import Functions 🕨 💼 Scan Using Indexes Above
	Batch Indexing Scan Using A Profile
	OCR Word Search Upload Scanned Documents
	Additional Index Filter

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

Image Inquiry			«
Profile Search			Menu 🗸
K Back			
Name 🔺	Syst	Short Name	
COURT DOCUMENTS FOR S	Z	COURT DOCU	

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

# 8.27.4. Upload Scanned Documents

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

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

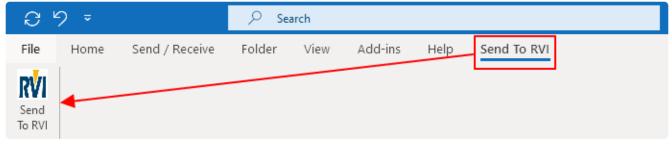
### 8.28. Send To RVI

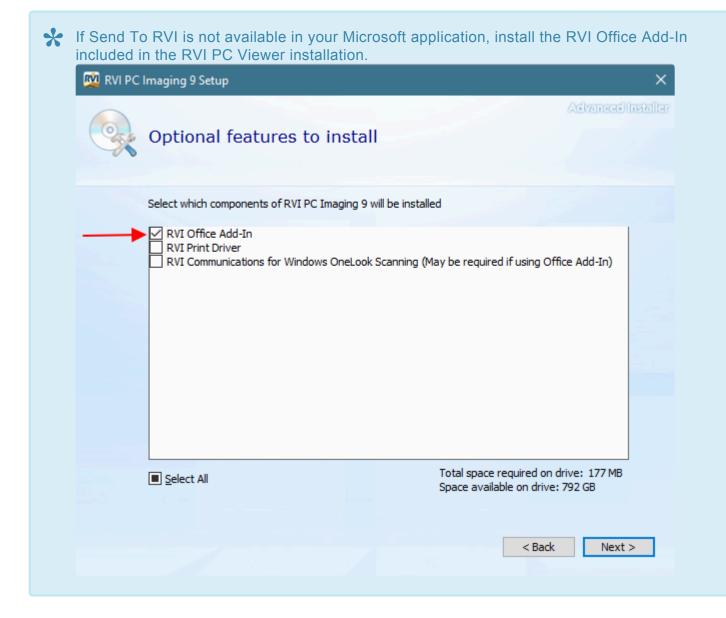
1	One Look requires the <b>RVI PC Viewer</b> for send to rvi.
•	The RVI PC Viewer must be <b>Connected: IBM DATA QUEUES</b> . The One Look browser must be <b>Host-Socket Connected</b> .
	Image Inquiry (Host-Socket Connected)
	Refer to <u>Setup/Maintain IBMi Host Socket</u> under <i>How To Instructions</i> section for details on workstation configuration when using Host Socket.

1. Open the RVI PC viewer (<u>RVI.EXE</u>) and One Look browser.

From within a Microsoft Office application:

2. Select Send To RVI.





3. Index the file then click OK.

😥 RVI Index Values	×
SYS. CODE Z - COURT DOCUMENTS AND EXHIBITS	ОК
CASE NUMBER 1202712	Cancel
FILE DT	
PLANTIFF E MAYS	
DEFENDANT W REED	
CASE TYPE	
COURT/JUDGE	
DOCUMENT TYPE	
JIAIEMENI ·	
Extract Words for Fulltext Processing	
Den document after processing	
🔲 Separate EMail Attachments	



4. Verify the button in the bottom left hand corner of the RVI PC viewer is active. This means the document was sent to the RVI PC Viewer and is waiting to be uploaded.

- 5. From One Look, select an index method:
  - a. Drag Drop (PC Viewer Indexes)
     Use this option if you indexed the document using the RVI Index Values pop up.
  - b. Drag Drop (Indexes Above)Use this option if you want to index the document using the One Look browser.

Image Inquiry (Host-Soc	ket Connected)		
Index Search	V Me	nu 🗸	
Z-COURT DOCUMENTS A	ND EXHIBITS 🖷 Change Sys	tem	
CASE NUMBER			
FILE DT			
PLANTIFF			
DEFENDANT			
COURT/JUDGE			
DOCUMENT TYPE		~	
From Date	To Date	•	
Search	Functions -	lear	
	Scan Functions		
E	Drag Drop/Import Functions	▶ ÷	Drag Drop (Indexes Above)
	Batch Indexing	F	Drag Drop (PC Viewer Indexes)
	Additional Index Filter Advanced Search		

The newly imported will now be available for inquiry.

Image Inquiry (Host-Socket Connected)	Z-C	OURT D	OCUMENTS AND	EXHIBITS					ې ج
Index Search Venu •		P	age 1 of 1		Displaying 1 - 1 of	f 1 🖁 🕻 Retriev	ve Request 🛛 🔽	Display Checked	Display Options -
Z-COURT DOCUMENTS AND EXHIBITS 👫 Change System		Flags	CASE NUMBER	FILE DT	PLANTIFF	DEFENDANT	CASE TYPE 🔺	COURT/JUDGE	DOCUMENT TYPE
1202712		riags							
FILE DT			1202712	02172021	E MAYS	W REED	С	P/J RILES	STATEMENT
PLANTIFF									
DEFENDANT									
CASE TYPE									
COURT/JUDGE									
DOCUMENT TYPE									
From Date 🖸 To Date									
🔎 Search 🙀 Functions 🕶 🔗 Clear									

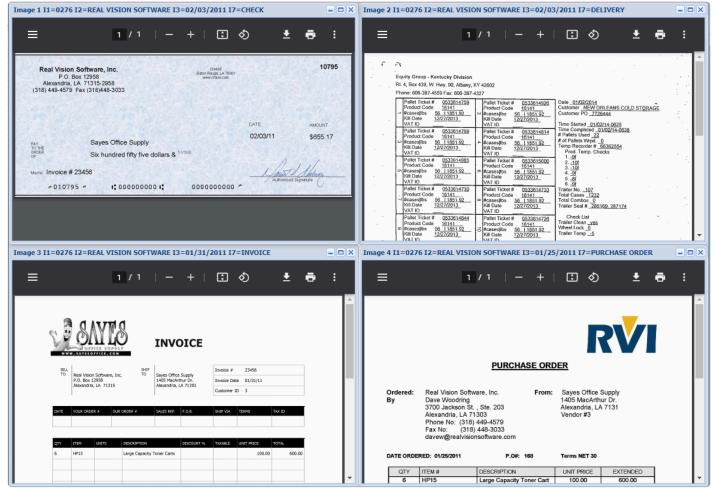
## 8.29. Show In Window

View one or more selected document(s) in a new window frame.

In this example, there are 4 records flagged.

D-AP SYSTE	D-AP SYSTEM											
	Page 1 of 1	2	Displayin	g 1 - 4 of 4 Items s	elected: 4 🛛 🖏 R	Retrieve Request 🛛	Display Checked	📄 Display Options 🗸				
✓ Flags	VENDOR #	COMPAN	Y	DATE 🔻	DOCUMENT TYPE	ТҮРЕ	CREATE-DATE	PAGES				
ridys												
	0276	REAL VIS	ION SO	02/03/2011	CHECK	IMAGE	2013/06/06	001				
V	0776	DEAL VIS	SION SO	02/03/2011	DELIVERY	IMAGE	2016/01/27	001				
RL	💥 Maintain Selecte	d VIS	SION SO	01/31/2011	INVOICE	IMAGE	2013/06/06	001				
N R	다 Route Document	t 🕨 VIS	SION SO	01/25/2011	PURCHASE ORDER	IMAGE	2013/06/06	001				
	Add to Tempora	ry										
	🚅 Add to Staple Gr	id										
	5 Show In Window	r										
	🗙 Delete Flagged I	tems										

#### Right-mouse click, select Show In Window.



## 8.30. Spool File

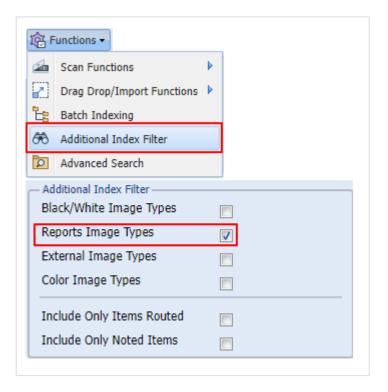
One Look allows for the display of spool files. Spool files are designated with Type **SPOOL**.

3-ADMISSION IMAGES										
Page 1 of 1 🕨 🕅 🖉 Displaying 1 - 138 of 138										
	<b>Flags</b>	DEPARTMENT REPORT ID TITLE DATE DOC TYPE TYPE CREATE-DATE							PAGES	
	Flags									
		ACCOUNTING	12345	BILL W OVER	01/09/2005	MAV3	SPOOL	2017/08/16	001	~
		HUMAN RES	1	INSURANCE	01/04/2005	GROUPBIL	SPOOL	2017/08/16	001	
	R	KOA ENGINE	CG05050	NEW ORDER	06/30/2016	ICG05050	SPOOL	2017/08/14	023	
	R	KOA ENGINE	GENP072	EXCEPTION	2016/11/07	INVOICE	SPOOL	2017/08/14	009	
	R	KOA REPORT	EXPORTS	PROBLEM ONE	01/03/2018	KOA1	SPOOL	2018/01/03	001	

### If you do not see the **TYPE** column, click the arrow in the top right corner of an existing column. Select **Columns**, *enable* **TYPE**.

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		5 ,		

The search criteria can be narrowed down to only show Spool reports (Type = SPOOL) by using the <u>Additional Index Filter</u> option Reports Image Types.



### 8.30.1. Display

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

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Example of a Spool file displayed using Google Chrome PDF display.	<ul> <li>Add to Temporary</li> <li>Display Temp Grid</li> <li>Combine/PDF</li> </ul>	Lef STK OF  STK OF CYTWO O CM OM CM OM		
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For viewing large spool files, RVI recommends enabling Display AS400 Spool Format.

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

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7		COMPL	01/04/18	B478090	SPOOL	2018/01/23	741

# 8.30.2. Keyword Search

Keyword Search is available through the browser using CTRL + f.

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46*	Fax Fax	search function to locate specific words in the document.
rom Date 🔲 To Date 🔲	Routing -	CTRL + f (hold down the Control Key and tap f)
] Show Deleted Records	Audit Information	
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		PLANNER 07000
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## 8.30.3. 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, Grid, or Txt format.

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#### PDF View:

*Example:* Display Type of **PDF View** using the **AND** logic and **Page** results.

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		<u>^</u>	Search Criteria Searching By Page
			AND planner 00074
PLANT M1	O SUMMARY LIST DATE 1/04/18 TIME 2:41 PAGE 1	G.P 1	AND Search Criteria #3
SUPPLR DUE B/0,			AND Search Criteria #4 AND Search Criteria #5
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			Search 🔇 Cancel »
4		• •	

#### Grid View:

*Example:* Display Type of **Grid View** using the **OR** logic and **Line** results.

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													rid to Excel	- Searc	h Criteria		Searching By Li
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4 300049	1/21	B/O	999-999	611211		M1	AA2464	WIRE H	EA	1	3	0	P300000	OR	Search Crite	ria #5	
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8						41	AA2464	WIRE H	EA	400	40	0	P300000				

To watch a video on building a grid <u>CLICK HERE</u>.

Choosing the Display Type of **Grid View** provides the option **Grid to Excel** allowing the results to be downloaded to an Excel spreadsheet.

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

From an IBM i command line, type GO IMAGE

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

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

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

#### Txt View:

*Example:* Display Type of **Txt View** without any search criteria.

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														OR	Search Criteri	a #3	
	DUE B/O, DATE ADV	ROUTE/DEL	DEL ORD REV	роск	PART #	DESC.		P/UM O	RD.LOT OR	.0TY	RCVD.	P.O. NO.		OR	Search Criteri	a #4	
300106	9/26 B/O	999-999	60926182	M1	AA246480-4810	WIRE HARNESS	32157-	EA	20	40	0	P300000		OR	Search Criteri	a #5	
ć				M1	AA246480-4820	WIRE HARNESS	32157-	EA	20	40	0	P300000	<b>~</b>	€ Search	🔕 Cancel	Display Type: T	xt View

# 8.31. Stapling

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

#### 1. Automatic Stapling

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

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

mage Inquiry	<b>*</b>	Z-COURT DO	OCUMENTS AND	EXHIBITS					© ? ¢
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PLANTIFF									
DESCRIPTION AND									
DEFENDANT									
CASE TYPE									
CASE TYPE	×								
CASE TYPE MONTOGUE	×								

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

Stapling

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.

One Look											
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- For further details on Automatic Stapling and the setup requirements, refer to Chapter 18 (Auto-Stapling) in the <u>RVI 90 IBMi User Manual</u>.
- 2. **Manual Stapling** The bundling process is triggered by the user adding a primary document and supporting documents from any available system code to the Staple Grid then selecting the Finalize button from the Staple Grid.

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

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

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DATE		321	DUNDER MIFF	01/03/2011	INVOICE	IMAGE	2018/10/10	001
		321	DUNDER MIFF	01/03/2011	RENEWAL DO	IMAGE	2018/10/10	001
DOCUMENT TYPE From Date To Date		321	DUNDER MIFF	01/18/2011	CHECK	IMAGE	2018/10/10	001
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	(PDF)		Device Id:\$001141	16 User Id: MCK	ENZY	©	Real Vison Software. A	ll Rights Reserv

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

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

Index Search	V Menu 🗸	^		I F	age 1 of 1	🕨 🕅 ಿ Di	splaying 1 - 4 of 4	🔄 Retrieve	e Request 🛛 🔀	Display Checked	Display Options 🗸
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# 8.31.1. Add Additional Documents to a Stapled Bundle

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

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

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	<ul> <li>Index Details</li> <li>Index Maintenar</li> <li>Route Documen</li> <li>Linking</li> </ul>	t	-mouse click	the primary st	apled record	then select Ma	aintain Stapl
	<ul> <li>Index Maintenar</li> <li>Gamma Route Documen</li> </ul>	Right	t-mouse click	the primary st	apled record	then select Ma	aintain Stapl

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

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

#### 5. Select Add to Staple Grid.

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Secondary (Seq 3 )	z	011319				04/24/2019		K ILES	(	o paul		E	W TIME

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.

	Display Options 👻
C3	Display Temporary Grid
2	Display Staple Grid
12 3	Show Row Numbers
	Show Row Numbers Grid To Excel

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

Manual Staple Grid							
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	(COURT DOCUMENTS AN	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
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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**.

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

# 8.31.2. Resequence Stapled Documents

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

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

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	+ Add Notes	24/2019	K ILES	O PAUL	E	W TIME	PIC
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	<ul> <li>Route Document</li> <li>Linking</li> <li>Load Indexes</li> <li>Audit Information</li> <li>Add to Tempora</li> <li>Maintain Staple</li> <li>Add to Staple G</li> </ul>	Right on ary rid	t-mouse click	the primary st	apled record	then select Ma	aintain Staple

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

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		(CASE # 011319	)		(FILE DATE) 04/24/2019	(PL) K IL		(DEFENDANT) O PAUL	(CASE E	: TYPE)	(COURT/JUDGE) W TIME
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3. Drag and drop the record to the new position in the sequence.

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

4. Select Finalize Staple.

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Secondary (Seq 3 )	Drag and drop to reorganize	011319	04/24/2019	K ILES	O PAUL	E	W TIME

The reorganization of the records is now complete!

# 8.31.3. Delete a Stapled Bundle

This will delete the entire stapled bundle.

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

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

#### 2. Select Maintain Staple.

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]	011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
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	+ Add Notes	24/2019	K ILES	O PAUL	E	W TIME	PIC
	Route Document     Linking		mouse click t	he primary sta	pled record t	ien select Ma	aintain Staple
	-	Right-	mouse click t	he primary sta	pled record t	ien select Ma	aintain Stapl
	Linking     Load Indexes     Audit Informatio     Add to Temporal     Maintain Staple     Add to Staple Gr	Right-	mouse click t	he primary sta	pled record t	ıen select Ma	aintain Stapl

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

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- 3. Right-mouse click the record you want to remove.
- 4. Select **Remove Record**.

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Secondary (Seq 2 )	Z	011319		04/24/2019	K ILES	O PAUL	E	W TIME				
Secondary (Seq 3 )	Z	011319	1	04/24/2019	K ILES	O PAUL	E	W TIME				
	📅 R4	move Record	1. Right-n	nouse click a record	l and select Remove	e Record. Repeat thi	s for every record e	xcept Primary.				

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

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

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# 8.31.4. 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.

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	011319	04/24/2019	K ILES	O PAUL	E	W TIME	ORDER
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The Staple Grid will open with a list of the existing documents in the stapled bundle.

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

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

#### 4. Select Remove Record.

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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				
		Remov	ve Record	1. Right-n	nouse click the r	ecord you want to	remove. Select Rem	ove Record.					

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

# 8.32. Temporary Folder / Grid

To watch a video on this topic CLICK HERE

Temporary Folder provides a holding area where users can store a copy of any document from any system to be used for temporary viewing and file comparison. The temporary folder is updated every time the user refreshes the page. (*The temporary grid is cleared automatically when the user logs off.*)

Documents can be added to Temporary Folder in 3 ways:

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

#### Option 1:

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

ndex Search Venu 🔻	Iter	ns select	ed: 4	Page 1 of 1		Displaying 1 - 10 of 10	D 🖸	isplay Checked	Display Options 🕶
COURT DOCUMENTS AND EXHIBIT		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT T
241780									
FILE DATE			241780	01/02/2018	J JARRED	T JARPER	-	MONTAGUE	DRAFT
		N	241780	03/15/2017	J JARRED	T JARF 🖹 Shov	v Notes	MONTOGUE	FIRST SUPPLE
PLANTIFF		NS	241780	03/15/2017	J JARRED	T JARF 🛨 Add	Notes	MONTOGUE	GARNISHMENT
DEFENDANT		NL	241780	04/22/2017	J JARRED	T JARF 🖂 Emai	il Image	MONTOGUE	PETITION
CASE TYPE			241780	07/24/2018	J JARRED	T JARF (j) Inde	x Details	BEAR	PICTURE
			241780	07/24/2018	J JARRED	T JARF 👩 Inde	x Maintenance	BIRD	PICTURE
COURT/JUDGE			241780	07/24/2018	J JARRED	T JAR (mark		MONTOGUE	PICTURE
DOCUMENT TYPE			241780	07/24/2018	J JARRED	T JAR	to Temporary	MONTOGUE	PICTURE
From Date 📑 To Date 📑			241780	07/30/2018	J JARRED	T JARF	v In Window	MONTOGUE	PICTURE IMP
			241780	01/18/2018	J JARRED	T JARRED	с	J DOWNS	WORD

#### Option 2:

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

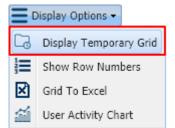
index Search Venu 🔻			Page 1 o	f 1   🕨 🕅 😂	Displaying 1 - 1	0 of 10	Disp	olay Checked 📃 🛙	Display Options 🕶
Z-COURT DOCUMENTS AND EXHIBITS 🗐 Change System		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT
241780									
FILE DATE			241780	01/02/2018	J JARRED	T JARRED	с	MONTAGUE	DRAFT
		Ν	241780	03/15/2017	J JARRED	T JARRED	С	MONTOGUE	FIRST SUPPL
PLANTIFF		N R	241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	GARNISHMENT
DEFENDANT		NL	241780	04/22/2017	1110050	T JARRED	с	MONTOGUE	PETITION
CASE TYPE			241780	0/	v Notes	T JARRED	с	BEAR	PICTURE
			241780	07 🛨 Add	Notes	T JARRED	С	BIRD	PICTURE
COURT/JUDGE			241780	07 🖂 Emai	il Image	T JARRED	С	MONTOGUE	PICTURE
DOCUMENT TYPE			241780	07 (j) Inde	x Details	T JARRED	С	MONTOGUE	PICTURE
From Date 🖪 To Date	. 🗆		241780	07 🐻 Inde	x Maintenance	T JARRED	с	MONTOGUE	PICTURE IMP
Q Search 🦗 Functions - 🖉 Clear			241780	01	to Temporary	T JARRED	С	J DOWNS	WORD

#### Option 3:

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

mage Inquiry	~	Back	IT IS FINALLY ORDERED that the ex parte order had been denied and the parties
ndex Search	Menu -	Back	shall share the physical custody of the minor children in the following manner:
		(i) Details	Alternating Elever 2 weeks with weeken
DOCUMENTS AND EXHIBITS	Change		in between: Each Perty has Right & List
241780		Maintenance	Repusal.
FILE DATE		Email	STANDING ORDER FOR PRETRIAL CONFERENCES IN FAMILY LAW MATTERS
PLANTIFF		🗊 Routing 🔻	
DEFENDANT		🗐 Audits 🔻	I. The Ninth Judicial District Court has Ordered that a Pre-Trial conference be held in
CASE TYPE		Linking	. this matter, in accordance with an evaluation program being conducted by the
COURT/JUDGE		Append Scan	Court. The purposes of the Pre-Trial Conference are:
DOCUMENT TYPE		Download	A. To discuss a resolution of any or all of the issues between the parties, without the necessity of a hearing;
From Date To Date	Clear	Add to Temporary	B.       To resolve any Preliminary Motions or Exceptions which may dispose of the need for a hearing of the pending hearing;         C.       To resolve any issues affecting preparation for the Trial of the hearing;         D.       To discuss rescheduling the hearing to the earliest possible date which allows all parties to adequately prepare for the hearing; and         E.       To enter an Order or Judgment as to all matters which can arnicably be resolved without the necessity of a hearing on the
		Image ID:ZAAAADKQ	issues pleaded. II. All parties and their attorneys (if any) must attend the Pre-Trial Conference.
		Image ID:ZAAAADKQ	issues pleaded.

The Temporary Grid can be displayed by selecting Display Options, Display Temporary Grid from the top right-hand corner of the One Look window OR display a document from any system and select Display Temp Grid from the <u>left side functions</u>.



#### Temporary Grid Features:

Temporary	y Grid							
🛞 Close	🖉 Clear Temporar	y Grid 💿 View Selected	Combine					
(ADMIS	SSION IMAGES)	(DOC TYPE)	(DEPARTMENT)	(REPORT ID)	(TITLE)	(DATE)	(NOT USED)	(NOT USED)
3			E9					
📄 (HR W	ORKFLOW SYST	(DOCUMENT TYPE)	(EMPLOYEE # <u> </u> Rem	ove Record	(DEPT)	(NOT USED)	(NOT USED)	(NOT USED)
🔲 U		BC	1450	07/30/2015	MAINT			
COUR	T DOCUMENTS	(DOCUMENT TYPE)	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
🗖 Z		PICTURE	241780	07/24/2018	J JARRED	T JARRED	С	MONTOGUE

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

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

selecting Remove Record.

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

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

### 8.33. Versioning

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

The **Version Document** button is available when viewing Type **O** documents such as Microsoft Office and PDF files.

Back	X		AAKS.		nat Help			2	Downle	bad â	Share	
🗐 Details				libri	- 11	• B	<i>I</i> <u>U</u> €	<u>, A</u> .				≣∙
Maintenance	CX				Fon							
Email	$f^x$		-	-				_				
Fax		A	B	С	D	E	F	G	Н	1	J	
	1	Date '/23/2018	Location	a 1/4								
Routing -	2	/23/2018										
Audit Information	4	/15/2018										
↓ Download	5	72572010	Jones, Ar									
	6										_	
+ Add to Temporary	7											
Display Temp Grid	8											
Ø Attach Document	9											
Version Document	10											
agai version bocument	11											
	12											
	14											
	15											
	16											
	17											
	18											
	19											
	20											
	21											*
Image ID:ZAAAAAKS	Chas	41										• •
Indge ID:ZAAAAAKS	Shee	ti										

Once the **Version Document** button is clicked, a pop up box will appear allowing the user to click **Browse** to navigate to the new version.

#### To complete the process, click **Upload**.

Back	X		AAKS.) dit Inser		at Help			2	Downlo	ad 🔒	Share	
Details			Q Cal	libri	▼ 11	• B	IU ÷	<u>, A</u> -	\``	<b>⊞ -</b> B3	- =	≣ •
A Maintenance	$f^{X}$											
Email	- (	А	В	С	D	E	F	G	Н	1	J	
Fax Fax	1	Date	Location									
Routing -	2	'/23/2018										
Audit Information	3	'/15/2018										
	4	/25/2018	Jones, AK									
Download	5											
+ Add to Temporary	6 7											
Display Temp Grid	8	Version Do	cument						×			
Ø Attach Document	9							_	_			
Version Document	10	Choose fil	e: (	C:\fakepat	h\657895_K/	Ashley_JJo	hnell.xlsx	Brow	/se			
	12											
	13						+					
	14						<u>_</u>	Upload				

Once the upload is complete, refresh the subfile list. A **V** will appear under the Flags column to identify any versioned documents.

z-co	-COURT DOCUMENTS AND EXHIBITS											
	Page 1 of 1 🕨 🕅 Displaying 1 - 1 of 1											
	Flags	CASE NUMBER	FILE DATE	PLAINTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE				
	_											
	V	011822	01/18/2022	L OWNS	P LYLE	MISC	O/003	XLSX				

View the record and select the <u>Previous Versions</u> button to see prior versions of the current document.

Image Inquiry 《	Back	X ZAAAAAKS.XLSX	+	Download â Share 9
Index Search	💻 Notes 👻	File Edit Insert Format H	elp	Download Chare
Z-COURT DOCUMENTS AND EXHIBITS	Details	🖙 🛥 🔍 📿 Calibri 🛛 🗸	11 • B <i>I</i> U <del>5</del> <u>A</u> • ¥	▶ · ⊞ • ⊞ • ☴ ≡ • 🖁
011822	Maintenance	f <sup>x</sup>		
01/18/2022	Email	A B C I	D E F G	H I J Z
LOWNS	Fax Fax	1 Date Location		
P LYLE	Routing -	2 '/23/2018 Alexandria, VA 3 '/15/2018 Redford, AZ		
MISC	Audit Information	4 i/25/2018 Jones, AK		
O/003	Previous Versions	5		A
XLSX	L Download	6		• • • • • • • • • • • • • • • • • • •
From Date 🖸 To Date	Image ID:ZAAAAAKS	Sheet1		
				*
				*
View Previous Versions				
S Close View Original Version				
Sequence User Name Path	n Name	Date	Time	Page Versioned
001 MCKENZY I:\I	MAGEL\VERSION	01/18/22	16:35:43	XLS

### 8.34. View

To watch a video on this topic CLICK HERE.

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

Image Systems	V Menu 🗸		A Page 0 of 0 P P 2 No data to display	🕃 Display Checked 🛛 🗮 Display Options 🕶	1
	, rena				4
Total Systems: 39 System A	System Name				-
System -				*** Ready to Search ***	
н	MEDICAL SYSTEM				
I	INSURANCE SYSTEM				
J	NET DATA CASE IMAGES				
к	BUNZEL TEST IMAGE SYSTEM				
L	PERSONAL PROPERTY				
М	MASTER IMAGE SYSTEM				
0	ACCUFUND ACCOUNTS PAYABLE DEMO				
Р	ACCUFUND A/R SYSTEM DEMO				
Q	ACCUFUND REQUISITIONS				
R	SIGNATURE DOCUMENT SYSTEM				
S	ACCUFUND PURCHASE ORDERS				
т	TRANSPORTATION SYSTEM				
U	HR WORKFLOW SYSTEM				
v	NET DATA DEMO IMAGES				
W	DEMO WORK SYSTEM				
х	FULL TEXT SEARCH DEMO				
Y	FIDELITY BANK SAMPLE DATA				
Z	COURT DOCUMENTS AND EXHIBITS				
a	TEST SYSTEM FOR COBURNS				
b	PRO DOCUMENTS				
c	CASINO DEMO				
d	ARKANSAS STATE TREASURER-DEMO	$\sim$	(PDF) Device Id:\$00106276	User Id: MCKENZY © Real Vison Software. All Rights Reserved.	

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.

nage Inquiry	<b>»</b>	Z-COURT DO	DCUMENTS AND	EXHIBITS					0?¢
Index Search	🔻 Menu 🗸		age 0 of 0	🕨 🕅 🥭 No data to di	play			Display Checked	Display Options •
Z-COURT DOCUMENTS AND EXHIBITS	🧾 Change System	Flags	CASE #	FILE DATE	LANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #									
FILE DATE					*** Read	dy to Search ***			
PLANTIFF									
DEFENDANT									
CASE TYPE									
COURT/JUDGE									
DOCUMENT TYPE									
From Date 🖸 To Date		•							
Q Search 🛛 🖓 Functions •	🖉 Clear								
		(PDF)		Device Id:\$0010	3276 User Id: MC	KENZY		© Real Vison Softwa	re. All Rights Reserved.
		(PDF)		Device Id:\$0010	3276 User Id: MC	KENZY		© Real Vison Softwa	re. All Righ

nage Inquiry	*	2.0	JORT DO	OCUMENTS AND	LANDITS					@ ? ¢
ndex Search	🔻 Menu 👻		P	age 1 of 1	🕨 🕅 🍣 Display	ing 1 - 6 of 6			Display Checked	Display Options •
Z-COURT DOCUMENTS AND EXHIBITS	🔲 Change System		Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
241780			Thags							
FILE DATE				241780	07/24/2018	J JARRED	T JARRED	с	MONTOGUE	PICTURE
				241780	07/30/2018	J JARRED	T JARRED	С	MONTOGUE	PICTURE IMPORT
PLANTIFF				241780	03/15/2017	J JARRED	T JARRED	с	MONTOGUE	FIRST SUPPLEME
DEFENDANT			N S	241780	03/15/2017	J JARRED	T JARRED	С	MONTOGUE	GARNISHMENT
CASE TYPE			NL	241780	04/22/2017	J JARRED	T JARRED	С	MONTOGUE	PETITION
MONTOGUE	×			241780	07/24/2018	J JARRED	T JARRED	С	MONTOGUE	PICTURE

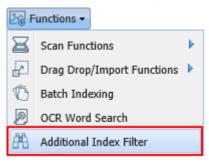
To set the number of records per page, click the **Settings** icon in the top right corner of the screen.

1-II	1POR	TED MIQ DA	ATA								8?
🛛 🔄 Page 1 of 3 🕨 🔰 😂 Displaying 1 - 1						Session Settings					
		LOAD#	ORDER#	PRO#	TRAILER	© Real Vison Softw	vare. All Rights Reserve	ed.			Version 6.26.19
	Fl					Grid Type		Regular	Tabbed	Tree	
				8211314		Remove Date Fo	rmatting	On/Off			
1				8211315		Remove Numeri	c Formatting	On/Off			
				8211317		Combine PDF		On/Off			
				8213906				On/Off			
				8214158 8213775		Polling					
				8213821		Hide West Regio	n ofter Cearch	On/Off			
1				8213823		-		On/Off			
]				8213843		Display AS400 S	pool Format	On/Off			
				8216912		Items Per Page		500		~	
				8216909		'Temporary Grid' initial window size	and 'Show in Windo				
				8216908				500			
				8216907		🚫 Clear Cookies		1000			Save Settings
				8216905 8216707			BILL OF	2500			
				8216701			BILL OF	5000			
				0210701				8000	1		

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.

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

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



🖄 Functions 🗸

– Additional Index Filter Black/White Image Types	
Reports Image Types	
External Image Types	
Color Image Types	
Include Only Items Routed	
Include Only Noted Items	

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

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

Image Inquiry	°19.		
	Back The defendant has recently exhibited volatile and erratic		4
Index Search Venu	Notes     Notes		options
Z-COURT DOCUMENTS AND EXHIBITS	Would be in the best interest of the children for the Court to		15 1
	order a psychological evaluation of both parties by a memai		PTOO
241780	Maintenance health professional selected by the Court, and that this would		ressing
FILE DATE	Email be in the best interest of the children."		Đu
PLANTIFF	Routing -		
DEFENDANT	Audit Information WHEREFORE, YOUR PETITIONER PRAYS:		
CASE TYPE	Append Scan      That this amended pleading be deemed good and sufficient and be ordered filed;		
COURT/JUDGE	2. That the prayer of the petitioner's original Petition for Divorce and Other		1
DOCUMENT TYPE	Relief is reiterated and reaffirmed, save and except as may be inconsistent herewith;		
From Date 🖸 To Date	Add to Temporary     Add to Temporary     Add to Temporary     S. That all allegations of the prayer are pleaded in the alternative were one may     be inconsistent with another; and		
🔍 Search 🛛 🖓 Functions 🕶 🖉 Clear	4. For all necessary orders and decrees.		
• • –	Combine/PDF		
	Retrieve Request		
	Image ID:ZAAAADKS	~	
	Page         2         of 4         >         )         2         Displaying 2 - 2 of 4		
			2

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 <u>session settings</u> to RVI to Viewer.

Move between systems by using the Search window.



button located in the top right corner of the Index



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 <u>RVI 90 IBMi User Manual</u> for details on Signature Capture.

### 9.2. Z-Options

Setup for Z-Options is done from the IBM i command line.

- With RVILIB in your library list, type **GO RVMAINT** to access the RVI Maintenance Menu.
- Option **15** Maintain Z-Option Menu.
- Press F9 = Add Item.
- Assign an unused Option # and a text description for the menu option.
- Set Option Enabled?: Y
- Assign the Program Name to be called.
- Press **F5** = Maintain User Security.

It is a requirement to add user id **QTMHHTTP** in order for the Z-Option to appear in OneLook.

Z-Option Menu Maintenance Sc					1999
I	Z-Optio	n Security	Copuright	RVI, 1999	ECUPD
		<u> </u>		RP/TSUBCTL	
Option #: 01 Menu Option	Seq#:	1			
Refresh Index Subfile After	Desc:	CHECK OUT	ТТЕМ		
	Desc.	CHECK OUT	TICM		
Option Enabled?: Y (Y/N)					cess.
Setting Enabled To N Will Re		Users:			1000
Press F5 If Security By User	Pos To:		_		ity.
		QTMHHTTP	_		
Program Name: <u>RVZCHOUT</u>			_		
		Sec.	_		
			_		
			_		
		<u>vo</u>			
		24			
	_				
	F3 =Ex	it			
F3 =Exit F5 =Maintain	n User Se	curity	F23 =Delete	Enter =Co	ontinue

Once the Z-Option is setup, the user can login to OneLook then right-click a record in image inquiry. Select **Z-Options** which will open the Z-Option Information dialog at the bottom of the screen. All available Z-Options will be listed.

One Look										
Image Inquiry (Host-Socket Connected) «	1	z-co	DURT DOCUM							
Index Search Menu		14	Page 1	of 1 🕨		🕑 Disp	playing 1 - 190 of	190		
Z-COURT DOCUMENTS AND EXHIBITS			_	CASE			FILE DATE		PLANTIFF	DEFENDANT
CASE			Flags			×		×	×	×
FILE DATE				021201	Ŧ	Add N	09/21/2021			
PLANTIFF				021201 022618					J GOOD	E LIVINGSTON
DEFENDANT	4			030299	1.7				S CLAUSE	G GRINCH
CASE TYPE	М			030299	ē		Details		S CLAUSE	M CLAUSE
COURT/JUDGE				030299			Maintenance		R CLAUSE	M CLAUSE
				040717	- T		Document		D SMITH	M SMITH
DOCUMENT TYPE				040717		Load I			D SMITH	M SMITH
RVI Creation Date - From 🔤 RVI Creation Date - To				042018						
Show Deleted Records				042018			Information			
A				044018	6		Temporary			
Search 🛱 Functions •		(PD	F)		~		Staple Grid		Device Id:\$00179	9400 User Id: MCKENZY
					6	Show	In Window			
Z-Option Information					Ŧ	Downl	oad			
•					X	Delete	Item			
🚫 Close					2	Z-Opti	ons			
Z-Option					_				Program Name	
Check Item Out.									RVZCKOUT	

The Z-Option will not work in OneLook if it is associated with an IBMi screen.

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

# 9.3. Customer Specific Programs

Customers can create a list of custom programs that can be easily accessed from Menu / Custom Menus. (See <u>Custom Menus</u> for details.)

## 9.4. Email Import Service

RVI monitors an incoming email address(es) then extracts the data from the email subject line, body, and/or attachment(s) for indexing and database lookup. When the extracted data goes into the RVI system, RVI will connect the captured data to your database and send it into workflow based on your specific needs and indexing requirements. RVI provides real-time graphs for monitoring the process. This process runs automatically 24/7.

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

Contact Real Vision Software to discuss Email Import Service setup.

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

#### Parameter Definitions used in Web Calls

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

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

#### **Examples By Function**

## VIEW

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

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

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

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

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

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

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

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



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

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

Example below will scan an item to image system code 7 while suppressing the indexing screen and setting Index1 = JOHN, Index2 = SMITH, Index7 = APPLICATION then clearing the RVI PC Viewer after the scan. http://ipaddress:port/pgms/

rvimain.pgm?rqstyp=rvwscan1n&isys=7&i1=JOHN&I2=SMITH&I7=APPLICATION&ocx=Y&sopt=Y&protect=Y&rtnpgm

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

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

#### Scan (color or black & white) – pass in image system code and user enters indexes:

Example below is a color scan to image system code A, Index 1 = TESTSCAN, Index 2 = SCANTEST http://ipaddress:port/pgms/

rvimain.pgm?rqstyp=rvisyssc3&isys=A&I1=TESTSCAN&I2=SCANTEST&scolor=Y&

#### Scan Using Scanning Profile – user selects scan profile name from a list:

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan00&

#### Scan Using Scanning Profile – pass in the scan profile name:

*Example below is scan profile BTC* http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan01&selbox=BTC&



**Upload 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. SYSTEM FILE LAYOUT**

For a PDF of the RVABREP System File Layout, click <u>HERE</u>.

## **13. TROUBLESHOOTING**

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

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

#### Non Microsoft Office Documents

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

### YOUR IMAGE IS NOT AVAILABLE

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

ne Look										
nage Inquiry		*	Z-COURT DOC	JMENTS AND EXHIBIT	S					0 ?
ndex Search		Venu 👻	14 4 Page	e 0 of 0 🕨 🕅	No data to display				Display Checked 👌 🗮 Sh	ow Row Numbers 🔀 Grid to Ex
Z-COURT DOCUME	NTS AND EXHIBITS	🔲 Change System	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JUDGE	DOCUMENT TYPE
CASE #					×	×	×	×	×	×
FILE DATE		•					*** Ready to Search ***			
PLANTIFF										
DEFENDANT										
CASE TYPE										
COURT/JUDGE										
DOCUMENT TYPE										
From Date	To Date									
O Search	E Functions •	🖉 Clear								
			(PDF)			Device Id:\$00088794 U:	ser Id: MCKENZY		© Rea	l Vison Software. All Rights Reserve

Microsoft Office Documents

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

Real Vision Software x +		- 0			
$\leftarrow$ $\rightarrow$ C $\widehat{\mbox{ \ absolute{-1.5}}}$ Not secure   12.27.2	33.218/internet/cmnss/ii	nageinquiry/app/index.html 🕼 🗲 🔂 👱 🖲			
One Look		Downloads 🗈 Q … 🖈			
Image Inquiry (Host-Socket Connected)	Back		<b>«</b>		
Index Search Venu -	💻 Notes 🗸	Open file	Option		
Z-COURT DOCUMENTS AND EXHIBITS	Details	In Microsoft Edge, when colocting an Office document to view	1s Pro		
CASE #	A Maintenance	In Microsoft Edge, when selecting an Office document to view the user will see a prompt to Downloads/Open file.			
FILE DATE	Email		bu		
PLANTIFF	Fax				
DEFENDANT	Routing -				
CASE TYPE	Audit Information				
COURT/JUDGE	Download     Add to Temporary				
DOCUMENT TYPE	Display Temp Grid				
01/26/2022	Retrieve Request				
Show Deleted Records	Attach Document				
Search 12 Functions • 🔗 Clear	Version Document				

To bypass the prompt to open the file in Google Chrome, see <u>No Preview Available</u> for instructions on how to setup Google Chrome to view Office documents.

Do you want to open or save BAAAAAA	1.XLS		Open Save 🔻 Cancel 🗙
← → C ▲ Not secure   12.27.233.218/in One Look Image Inquiry (Host-Socket Connected) 《	Back W	ZAAAADUG.DOCX	↔ ⓒ ★ Ø № ★ ≗ :
Index Search Menu -  Z-COURT DOCUMENTS AND EXHIBITS Change Sys  CASE #  FILE DATE  PLANTIFF  DEFENDANT  CASE TYPE  COURT/JUDGE  DOCUMENT TYPE	Notes  Details  Maintenance  Email  Fax  Routing  Audit Information  Add to Temporary	File Edit Format Tools Help	• Download     • Share     • B Z U A • M • ■ i=i=:     • A
01/26/2022     Image: To Date       Image: Show Deleted Records       ✓ Search       Image: Show Deleted Records	Display Temp Grid     Display Temp Grid     The sequest     Attach Document     Version Document	APPEI	ND 1

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

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

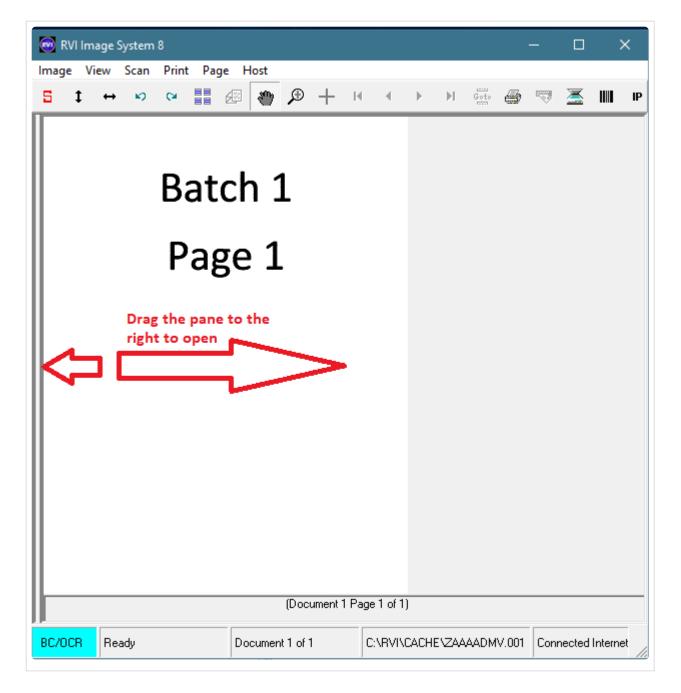
One Look		
mage Inquiry 🔍	Back	
Index Search Venu -	Notes -	
COURT DOCUMENTS AND EXHIBITS	(i) Details	
241780	Maintenance	
FILE DATE	🖂 Email	
PLANTIFF	Routing -	STATE OF LOUISIANA
DEFENDANT	🕄 Audits 🗸	PARISH OF RAPIDES
CASE TYPE	C Stapling	
COURT/JUDGE	🕂 Append Scan	·
DOCUMENT TYPE		AFFIDAVIT
From Date 🖸 To Date		
🔾 Search 🛛 Example Functions 🕶 🖉 Clear		BEFORE ME, the undersigned authority , personally
		came and appeared , who after being first duly sworn, did depose and say:
		That he is the petitioner in the above captioned matter and that all allegations of fact are true and correct to the best of his knowledge, information and belief.
	Image ID:ZAAAADKR	

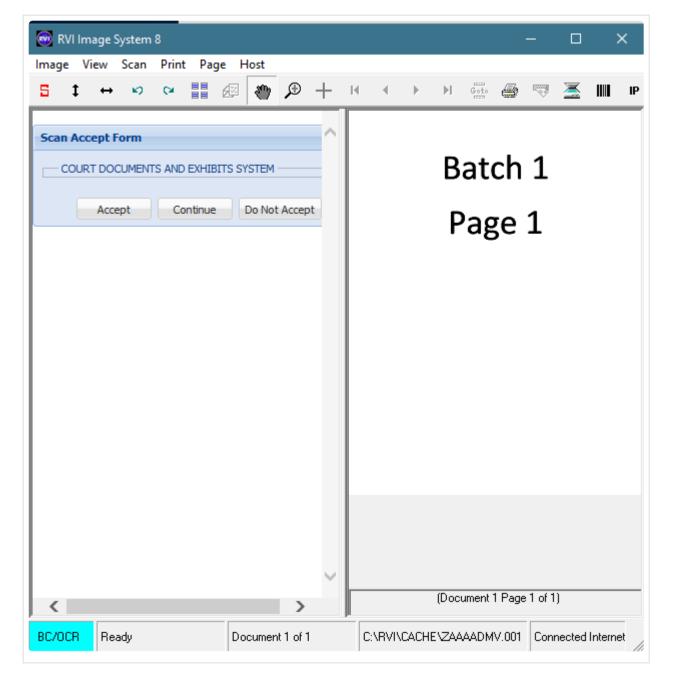
Expand the option processing window if it's not open already. Cancel out of the maintenance window. Now you will be able utilize the index search window.

One Look				
Image Inquiry 🔍	Back		Options Processing	
Index Search Venu -	🖹 Notes 🗸		Index Maintenance	
Z-COURT DOCUMENTS AND EXHIBITS	Details     Maintenance     Email		CASE #: FILE DATE:	241780 03/15/2017
PLANTIFF DEFENDANT	Routing	9 <sup>70</sup> JUDICIAL DISTRICT COURT IN AND FOR THE PARISH OF RAFIDES STATE OF LOURSIANA	PLANTIFF: DEFENDANT: CASE TYPE:	E ZEND H POTTER C
CASE TYPE COURT/JUDGE DOCUMENT TYPE From Date To Date Conserved Clear Conserved Clear	Append Scan	PILED: DEPUTY CLERK: <u>URDERGENNET TO B CARVENIENDERT</u> Tors nater heist genere en hei date fortra de considering the brempsterion paparadol, the asserver field by Garashine and the law and existence heigt from of planting the same of the law and the law and existence heigt from of planting the same of the law and the law of the law of the law of the law Autometer, Lawlence 	COURT/JUDGE: DOCUMENT TYPE:	MONTOGUE GARNISHMENT
	Image ID:ZAAAADKR			
			- <	>

## 13.3. 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.





## **13.4. 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

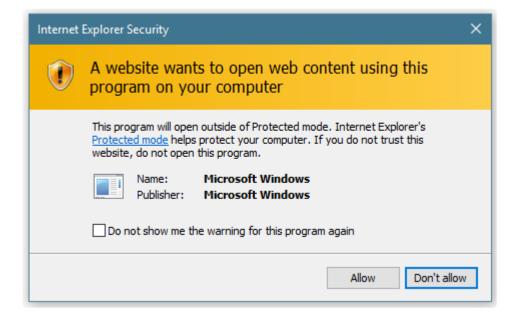
Protected Mode.' To disable 'Enable Protected Mode', open IE tools (ALT + X) or click , select Internet Options, Security tab.

Internet (	Options					? ×
General	Security	Privacy	Content	Connections	Programs	Advanced
Select a	a zone to vi	iew or cha	ange securi	ty settings.		
		9		/ (	$\mathbf{S}$	
Int	ernet L	ocal intra	net Trust		stricted sites	
		e is for Int hose lister	ternet web d in trusted		Site	ÈS
	ity level fo wed levels			m to High		
	- A - P co	rompts be ntent	e for most efore down	websites loading potent trols will not be		d
	Enable Pro	otected M	lode (requi	res restarting I	internet Exp	lorer)
			Cust	com level	Default	level
				Reset all zone	s to default	level
			Ok	Ca	ancel	Apply

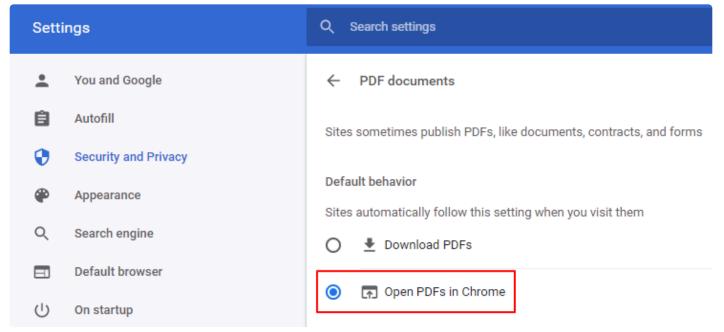
## 13.5. Open or Save RVIMAINXML.PHP

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

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



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



## **13.6. No Preview Available**

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

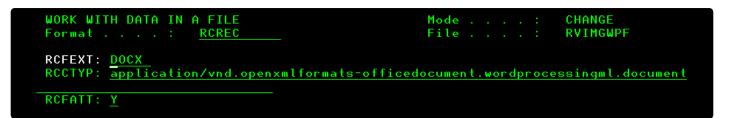
#### To Resolve the Message:

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

- Open main.js. in notepad then search for: GoogleDocs.indexOf(fileformat)
- Locate the next line under GoogleDocs.indexOf(fileformat) this.officedocs = "Y";

/ main.js - Notepad	—	×
File Edit Format View Help		
<pre>var videoflag = "Y"; } else {     var videoflag = "N";     if (GoogleDocs.indexOf(fileformat) &gt; -1){         this.officedocs = "Y";     } }</pre>		^

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



7. Set RCFATT: to Y

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

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

## 13.7. Index contains an invalid wildcard character

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

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

## 13.8. Page Forbidden Error When Accessing OneLook Login

If you are not able to get to the One Look login screen and/or you are getting the Page Forbidden error, verify /**CGIBIN** is set to \*PUBLIC with RWX access.

		Work	with Autho	rity
Object		a. 12	/cgibin	
Туре			DIR	
Owner			MONTY	
Primary group .			*NONE	
Authorization li	st	a 12	*NONE	
Type options, pr 1=Add user 2		autho	ority 4=R	emove user
	Data	Obje	ct Authori	ties
Opt User	Authority	Exist	Mgt Alte	r Ref
*PUBLIC	*RWX	Х	х х	х

Also verify that user ids **QTMHHTTP** and **QTMHHTP1** are enrolled in System Distribution Directory (WRKDIRE) on the IBMi.

#### Adding a user to WRKDIRE:

To add a user, type **GO MAIN** on the IBMi command line. Take option **11** iSeries Access tasks, then option **21** Enroll iSeries Access users.

MAIN OS/400 Main Menu
Select one of the following:
<ol> <li>User tasks</li> <li>Office tasks</li> <li>General system tasks</li> <li>Files, libraries, and folders</li> <li>Programming</li> <li>Communications</li> <li>Define or change the system</li> <li>Problem handling</li> <li>Display a menu</li> <li>Information Assistant options</li> <li>iSeries Access tasks</li> </ol>
Selection or command
PCSTSK iSeries Access Tasks
PCSTSK iSeries Access Tasks Select one of the following:
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

You will then see the following screen:

Enroll iSeries Access L	lsers
Type choices, press Enter.	
User profile User identifier:	Name
User ID	Character value Character value
User description	
Add to system directory <u>*yes</u>	*NO, *YES

Enter the user's IBMi 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.

## 13.9. Twain Scanning TypeError: Cannot read properties of undefined

If you receive the following error, the Twain setup is not being recognized.

Error	×
Error: TypeError: Cannot rea	ad properties of undefined (reading 'send')
	ОК

The error is due to one or more of the following:

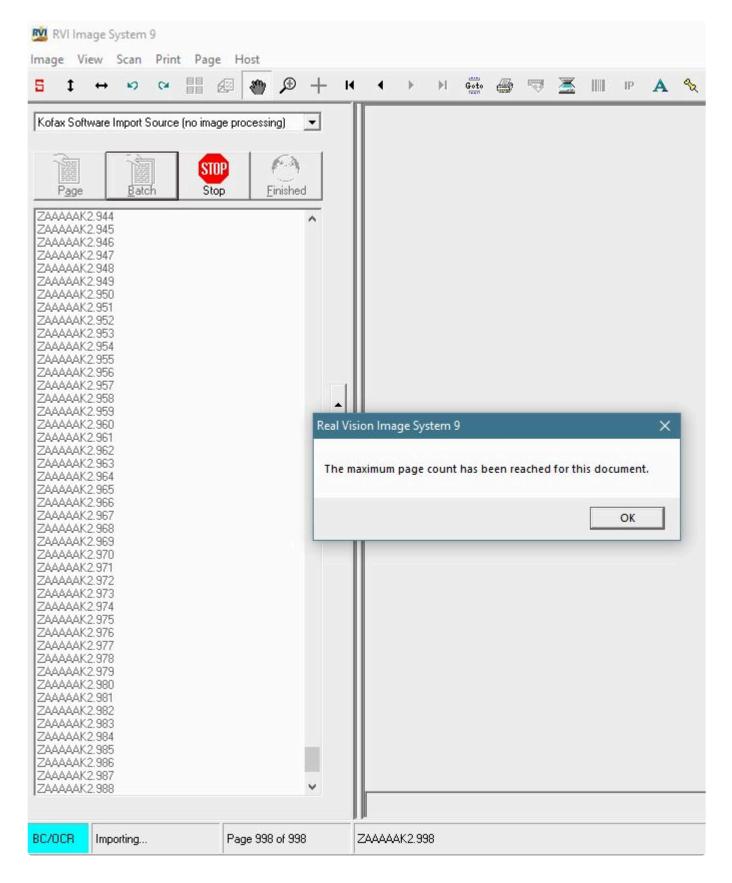
- Twain Driver is not installed.
- RVI Communication Server is not installed/running in the System Tray on the pc.
- A Twain Device is not specified in the RVI Communication Server.

## 14. FAQ

## 14.1. Is there a maximum page count?

Maximum page count per record is 998. This is an IBM file limitation.

User will receive the following message when scanning/importing through the RVI PC Viewer once 998 pages have been reached.



If more than 998 pages are needed, create a new record with the additional pages then <u>staple</u> it to the original 998 page record. Another option is to create a PDF of all the pages then <u>import</u> the PDF.

## 14.2. What scanner is recommended for use with RVI?

RVI will support any scanner supported by Kofax. Those are listed in the Kofax scanner configurator.

If barcode recognition is needed, you must purchase Kofax VRS software. RVI recommends Kofax VRS also for image cleanup and better product integration.

RVI recommends asking the reseller to bundle Kofax VRS software with the scanner at the time of purchase. This usually results in a better price than purchasing Kofax VRS separately.

## 14.3. What is the proper sequence when installing a new scan station?

#### USB Scanner with VRS

USB scanners ship with a CD containing ISIS and Twain drivers. Some USB scanners are bundled with a CD containing Kofax Virtual Rescan (VRS).

When installing a USB attached scanner, you will need to install the ISIS driver first. It is not necessary to install the Twain driver if you are going to run Kofax software, but there is no harm in doing so. Once the ISIS driver is installed, you can install Kofax VRS if the scanner came bundled with VRS or you purchased VRS separately. During the Kofax VRS installation, you will be prompted to select your scanner make/model. Be careful to select the correct scanner as this option will automatically create all the entries you need in the Kofax source manager to run your scanner. In years past, you had to manually create these entries, but now with Kofax VRS these entries are created for you. When Kofax VRS is done installing, you will get a message to reboot your pc. DO NOT REMOVE THE CD FROM THE DRIVE. Reboot the PC with the CD in the CD rom drive. Once the PC comes back up, you will likely be prompted to check for VRS updates. Once that is complete, you can remove the CD from the drive. At that time, you can install the <u>RVI PC viewer</u> if you have not done so already.

If the Kofax install was successful, the Kofax sources should have been created automatically for you within the Kofax Admin Console.

Test the scan station within Kofax VRS Test Console to ensure the install was a success and then try testing in the RVI PC Viewer.

For instructions on testing the scan station in Kofax VRS Test Console, click HERE.

## **15. HELP**

## **15.1. How To Instructions**

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

## **15.1.1. Install the RVI PC Viewer**

- 1. Download the latest RVI PC Viewer from <u>Real Vision Software</u>, Support, Support Resources, Login *rvi4579*, Version 9.0.
- 2. Select RVI PC Installation Version 9.x.
- 3. Extract the .zip file to the PC hard drive.
- 4. Open RVI9x folder.
- 5. Run the installation by double-clicking or right-mouse clicking RVI PC Imaging 9.x Installer.exe.

RVI recommends installing using right-mouse click then select 'Run As Administrator' (if available).

## 15.1.1.1. 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 **Connected: IBM DATA QUEUES** in the bottom right corner if it's communicating properly.

🕺 RVI Image System 9	9		– 🗆 X
Image Scan Host			
5 ‡ ↔ છ	° 🖩 🕭 🍎 🎗	Ð 🕂 🛯 🔹 🕨 👘 🖨	🤜 差 III 🖻 A 🔧
	• = † ‡ 🔨 🔳	Approved	
Ready	Document 0 of 0	(none)	Connected: IBM DATA QUEUES

To establish the RVI PC viewer to One Look connection, set the EHLLAPI value to **IBM DATA QUEUES**. For a full set of instructions on setting up the socket connection and the RVI PC Viewer, refer to <u>Setup/</u><u>Maintain IBMi Host Socket</u>

Preferences			
<ul> <li>General</li> <li>Screen Scrape</li> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> </ul>	You may change your EH following: NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL CO IBM DATA QUEUES BOSANOVA RALLY 32	LLAPI support type by choosing one of the	
Internet Support EHLLAPI	Polling Interval: 1	4	•
	Library DQ Type IBM i Address IBM i User IBM i Password	Max # Seconds: 60          RVILIB         IBM i User         12.27.233.218         mckenzy         xxxxxxx	
		OK Cancel	

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

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

# 15.1.3. Setup One Look Users and System Access

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

These instructions and results are based on the assumption that you are setting up a new internet user that does not currently exist under IBMi RVI Security/Internet Menu Options **1** Maintain Image Security By User, **7** Maintain Internet User Profiles, or **10** Maintain Internet User Access.

REAL VISION SECURITY/INTERNET MENU
Security Options 1. Maintain Image Security By User. 2. List Image Security. 3. Maintain Option Security By User. 4. List Option Security. 5. Maintain Index Level Security. 6. List Index Level Security.
<u>Internet Options</u> 7. Maintain Internet User Profiles. 8. List Internet User Profiles. 9. Maintain Internet HTML Screens.
10. Maintain Internet User Access.

### Setting up One Look 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 ONLY to ALL unsecured systems:

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

- 4. Specify an Internet User Id and Password
- 5. Press < Enter >

#### **Option 2: Allow access to ONLY specific secured systems:**

- 1. Select 11: Security/Internet Menu
- 2. Select 10: Maintain Internet User Access
- 3. F9 = Add User
- 4. Specify an Internet User ID, Password and secured System ID
- 5. Press < Enter > until you return to the Internet Profile Maintenance Screen
- 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
- 10. Under System ID Code column, specify the secure system id you created in Steps 1-5
- 11. Press < Enter >

Steps 1 – 11 must be repeated for EVERY secured system id the user will need to access.

#### Option 3: Allow access to a combination of specific secured and unsecured systems:

- 1. Select 11: Security/Internet Menu
- 2. Select 10: Maintain Internet User Access
- 3. F9 = Add User
- 4. Specify an Internet User ID, Password and System ID
- 5. Press < Enter > until you return to the Internet Profile Maintenance Screen
- 6. 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 4, continue to Step 7.

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

Steps 7 – 10 must be repeated for EVERY **secured** system id the user will need to access.

#### Option 4: Allow access to ALL unsecured systems and SPECIFIC secured systems:

- 1. Select 11: Security/Internet Menu
- 2. Select 7: Maintain Internet User Profiles
- 3. F9 = Add User
- 4. Specify an Internet User Id, Password and unsecure 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
- 10. Under System ID Code column, specify the secure system id
- 11. Press < Enter >

Steps 7 – 11 must be repeated for EVERY secured system id the user will need to access.

## 15.1.4. 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
				RVAWC	NFFM/	SCRN1
Instance Name RV						
Port: 80						
Library RV						
Additional Directory 1:						
Additional Directory 2:						
Additional Directory 3:						
Additional Directory 4:						
Additional Directory 5:						
Start Server? Y/N: <u>Y</u>	Only if cre	eating inst	ance			
F5 = Create Instance F7 = Remove	. Instance	F9 = Cr	eate	Secur	re Ins	tance
Entries will be made for IMAGE and O		lirectories	and		folde	re
Entries witt be made for immde and o	FIICHE IFS (	inectories	anu	QDES	Totue	
Additional Directories are any IMAGE	-liko dinoci	torior for	whick		CTORV	and
ALIASMATCH blocks are to be created						
ALIASMAICA DIOCKS are to be created					_	
tesiling electron in the Odditional D					the u	
trailing slashes in the Additional D						
trailing slashes in the Additional D folder named IMAGE2 would be entered						

- 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'.

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

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

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

	REAL VISION IMAGE MENU Ver. 9.0	
1. Image Inquiry.	6. Image Management Menu.	11. Security/Internet Menu.
2. Scanning Menu.	7. Optical Menu.	12. Screen Scrape Menu.
<b>3.</b> 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.
<b>F3</b> =Exit Selection or comman ===> <u>WRKLNK 'WWW'</u>		90 =Signoff
	F9=Retrieve F12=Cancel istant F16=System main menu	
M <u>A</u> C	A	20/007

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

	Work wi	th Object Lir	iks	
Directory : /				
Type options, press Enter. 2=Edit 3=Copy 4=Remove 11=Change current director		splay 7=Rer	ame 8=Disp	lay attributes
Opt Object link 5WWW	Type DIR	Attribute	Text	
Parameters or command ===>				Bottom
F3=Exit F4=Prompt F5=Re F22=Display entire field		F9=Retrieve F23=More opti		F17=Position to

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

Directory .	1011 (1 f) ZWWW				
2=Edit 3=	press Enter. Copy 4=Remove current director		olay 7=Rena	ame 8=Displ	ay attributes
Opt Object PCWEB RICHTES RICHWEE RVIECS RVISECU S RVISEL1 S RVIWEB RVIWEBS	ST 3S JRE RC	Type DIR DIR DIR DIR DIR DIR DIR DIR	Attribute	Text	More
Parameters or ===>	command				

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

Work with Object Links					
Directory : /	www/RVIWEB				
Type options, press Ente 2=Edit 3=Copy 4=Re 11=Change current dire	move 5=Disp	lay 7=Renam	le 8=Disp1	ay attributes.	
Opt Object link	Туре	Attribute	Text		
5 conf htdocs	DIR				
htdocs	DIR				
logs	DIR				
				Bottom	
Parameters or command				_	
===>					
F3=Exit F4=Prompt F5		=Retrieve F	12=Cancel	F17=Position to	
F22=Display entire field	F2	3=More option	IS		

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

Work with Object Link	<s< th=""></s<>
Directory : /WWW/RVIWEB/conf	
Type options, press Enter. 2=Edit 3=Copy 4=Remove 5=Display 7=Rena 11=Change current directory	ame 8=Display attributes
Opt Objectlink Type Attribute 5_httpd.conf STMF	Text
Parameters or command ===> F3=Exit F4=Prompt F5=Refresh F9=Retrieve	Bottom F12=Cancel F17=Position to
F22=Display entire field F23=More optic	ons

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

Browse : /www/RVIWEB/conf/h Record : <u>1</u> of Control :		Column : <u>1</u>	59 by <u>79</u>
+1+2+ ****************Beginning of da		.5+6	+ 7 +
<pre></pre> <pre>&lt;</pre>			
<pre><limitexcept get="" head="" opt<="" pre=""></limitexcept></pre>	IONS TRACE POST>		
Order deny,allow			
Deny from all			
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.

## **15.1.5. Configure IBMi Email Server**

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

## **15.1.6. Create Action Codes**

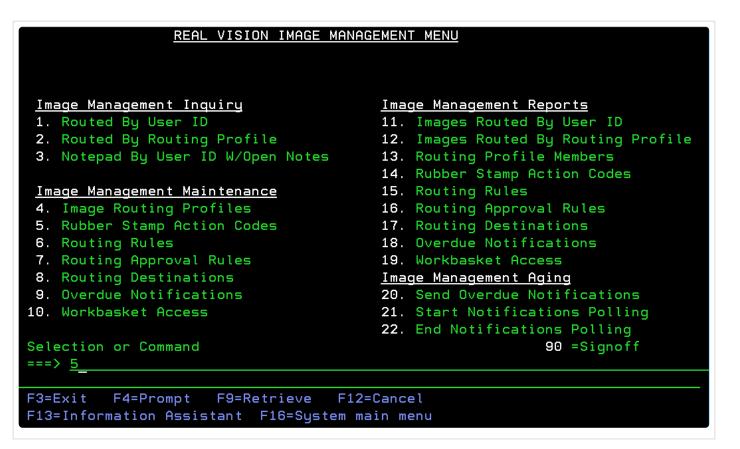
1. From an IBM i command line, type GO IMAGE

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

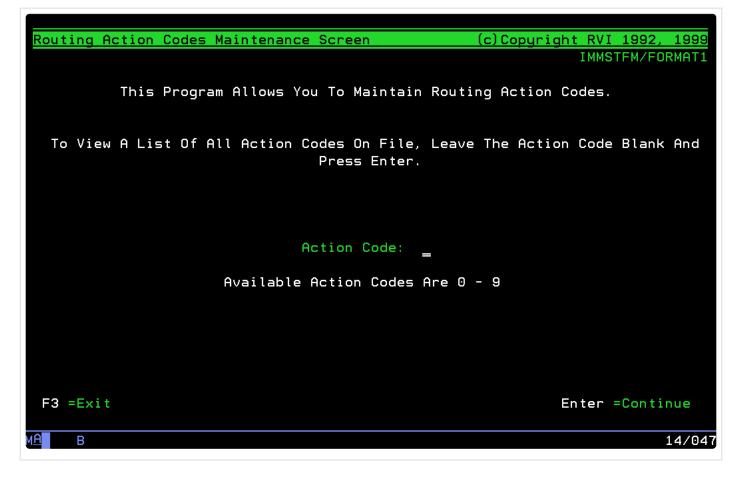
2. Select 6: Image Management Menu

	REAL VISION IMAGE MENU	
1. Image Inquiry.	6. Image Management Menu.	11. Security/Internet 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 Selection or command ===> <u>6</u>	•	90 =Signoff

3. Select 5: Rubber Stamp Action Codes



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



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

Routing Ac	tion Codes Maintenance Screen	(c)Copyrig	ht RVI 1	.992, 1999
			IMMSTF	M/FORMAT2
	Action Code: 5			
	Description: <u>CANCELLED</u>			
	Additional Information Required?:	_ (Y/N)		
		Delete Code: _	(D=Del	.ete)
F3 =Exit	F12 =Cancel		Enter =0	Continue
м <u>А</u> В				09/036

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

Routing Action Code	es Selection Screen	(c)Copyright RVI 1992,	1999
-		IMMSTFM/CAT	LSTCT
Type Option, Pres X=Select D=Dele			
A-Select D-Dele	Le	Addl Information	
<u>Opt</u> <u>Action Code</u>	Description	Required? Y/N	
_ 0	APPROVED	Y	
- 1	REJECTED	N	
_ 2 3	RECEIVED HOLD PAYMENT	Y Y	
_ <u>3</u> 4	PREVIOUSLY PAID	N	
_ 5	CANCELLED	N	
Page Up =Previous   F3 =Exit	Page F12 =Cano	Page Down =Next P el Enter =Contin	
			ue
м <u>А</u> В			08/004

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

Quet	e Up Appr	oval					1
Ado	litional Infor	mation				1	
-4	pproval —						
0	Approve	0	Disappr	ove			
CA	NCELLED			x	~		
AP	PROVED						
RE	JECTED						
RE	CEIVED						
но	DLD PAYME	NT				4	
PR	EVIOUSLY	PAID					
CA	NCELLED						

### 15.1.7. CALL MVC013 or MVC013D

#### MVC013: Scan to PC

The parameters are described below.

Length	Туре	Description		
211	Char	The 1-byte System ID concatenated with the seven, 30 byte indexes		
2	Char	Return Code		
		If blanks are passed in, a black and white scan will result		
		If CL is passed in, a color scan will result		
		If RT is passed in, the user will be prompted for a Routing Profile after the		
		scan		
		If the user accepts the resulting scan, OK will be returned in this parameter		
2760	Char	Optional Parm – Pass as an Array that is 30 x 92 for indexes 8 through 99		
		Place values in array elements corresponding to the index value. For example		
		the value for index 8 is in the first 30 byte element and index 99 is in element		
		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 <b>SNNNNNN</b> , where <b>S</b> is the Image System ID Code and <b>NNNNNN</b> is the Transaction Number

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

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

Positions 5-12, Routing profile Positions 13-20, Barcode profile

Positions 21-30, Document type

#### MVC013D: Scan Direct

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

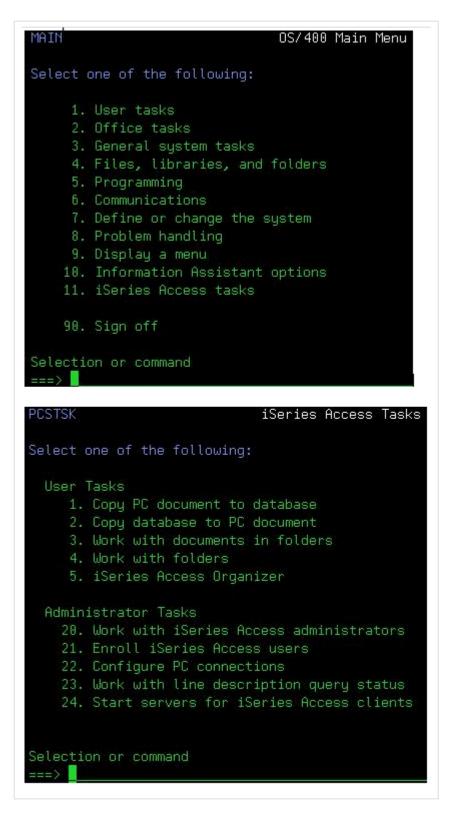
Length	Туре	Description			
211	Char	The 1-byte System ID concatenated with the seven, 30 byte indexes			
2	Char	Return Code.			
		If blanks are passed in, a black and white scan will result			
		If CL is passed in, a color scan will result			
		If RT is passed in, the user will be prompted for a Routing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

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

#### **15.1.8. 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



You will then see the following screen:

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

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

## **15.1.9. Setup Option Security**

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

#### By default users have access to all options.

<	OneLook Retrieve Request Button
>	OneLook Edit Sec Fields
(	OneLook Workbasket Menu
)	OneLook Maintenance Menu
+	OneLook Batch Indexing
*	View Unredacted
&	OneLook Additional Index Filter
!	OneLook Download
-	OneLook Change Password
@	OneLook Temporary Grid
?	See Routing
#	OneLook Include Deleted Records
=	OneLook Import

A	Audit Inquiry		
В	View Previous Version		
С	Call Back Reminders		
D	Delete from Routing Queue		
Е	Email Image		
F	Fax Image		
G	Packages		
Н	Approval History		
I	Include Page		
J	Stamp Signature		
к	Approve/Disapprove		
L	Disable Right Mouse On Web		
Μ	Move Image From Workbasket		
Ν	Notepad		
Ρ	Print Image		
Q	View and Re-Index		
R	Routing Profile		
S	Scan Documents		
т	Suspended Records		
U	Route User		
V	View Image		
Х	Image Information		
Ζ	Custom Options		
с	Change Priority		
d	Allow Deletion in Index Maint		
е	PC Viewer Email		
k	Approve/Disapprove History		
m	Manual Restage		
n	Auto Notes on Web		

р	PC Viewer Print
q	Queue All Documents
s	Staple Documents
t	Return To Sender
u	Upload Documents
v	Multi-View
w	Move to Sub Workbasket
х	Web Index Maintenance
1	Add Redactions
2	Highlighting
3	Menu
4	Toolbar
5	Queue Up Apr (UnSuspend)
6	Queue Up Approvals
7	Queue For Indexing
8	Image Update From Routing

# 15.1.10. Setup Image Markup Preferences

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

Display Options				
Image Settings Annotation		<u>0</u> K		
Set the default color o Highlight Color:	ptions for Highlights and Annotations	Cancel		
Note Color:	Yellow			
Text Color:	Black 🗨			
Line Color:	Light Red 💌			
Line Width:	8 💌			
Auto Arrow Length:	200 pixels			
Auto Arrow Rotation:	45 degrees 💌			
Display options selected from this dialog are retained for subsequent image viewing. If temporary settings are desired, use the corresponding toolbar options for the currently selected image.				

### 15.1.11. Setup a Scan Profile

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

### **15.1.12. Setup a Scan Station**

Start by following the instructions in the Install the RVI PC Viewer section.

Once the RVI PC Viewer is installed and the <u>EHLLAPI</u> is setup. Install the scanner driver. If you are running Kofax VRS, you will need to install the ISIS driver then Kofax VRS. If you are not running Kofax VRS, you will need to install the Twain driver.

- A licensed copy of Kofax VRS is required for barcode scanning. Kofax VRS can be purchased directly from Kofax at www.kofax.com or by calling 949-727-1733. Kofax is also available through resellers. RVI recommends contacting the company you purchased your scanner from for information on purchasing Kofax VRS.
- Open the RVI PC Viewer.
- Navigate to Image/Preferences/Scanner Support to setup the Default Scanner.

- For Kofax/ISIS scanners, check the box labeled Load Kofax Scanners
- For Twain scanners, check the box labeled Load TWAIN Scanners
- Select your scanner from the Default Scanner drop down list.

Preferences				
General General Screen Scrape Index Options E-Mail External Viewers Disk Caching Signature Pad Scanner Support Auto Import Support FTP Support Internet Support EHLLAPI	Default Scanner       Barcode       IP         Default Import Engine       Barcode       IP         None       Barcode       IP         I coad TWAIN Scanners       Barcode       IP         Load Kofax Scanners       Barcode       IP         Send images to IBM Host System while scanning (Applies to Scan Direct from IBM Host System Only)       Send images to Barco & White         Send images to IBM Host System Value Scan/Impot       Send Patch Codes       Left Offset [4.25]         Backup original files after impot       Send Patch Codes       Left Offset [4.25]         Backup original files after impot       Send Barcodes Tile on Scan Direct         Upload Index File on Scan Direct       Save Scanned Image Index Files to Backup Folder By Date         Save Scanned Image Index Files to Backup Folder By Date       Save Scanned Image Index Files to Backup Folder By Date         IDE       Barcodes with       IDE         IDE       Barcodes with       IDE			
	OK Cancel			

The list of scanners is based on the drivers installed on the pc. If you do not see your scanner listed, verify Windows recognizes the scanner in Device Manager.

Once the scanner is setup in the RVI PC Viewer, you are ready to scan from OneLook using the <u>Scan Using</u> <u>Indexes Above</u> <u>Scan Using A Profile</u> options.

#### 15.1.13. 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.

## 15.1.14. 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 Originato	or Email Address Ma	intenance	(c) Copyright 2003, RVI
Skip To User	ID:		
<u>0</u> User ID	<u>User Name</u>	Email Address	
			More
Opt: 1=Select F3=Exit	t 2=Modify	4=Delete F6=Add Record	F12=Cancel
MA D			

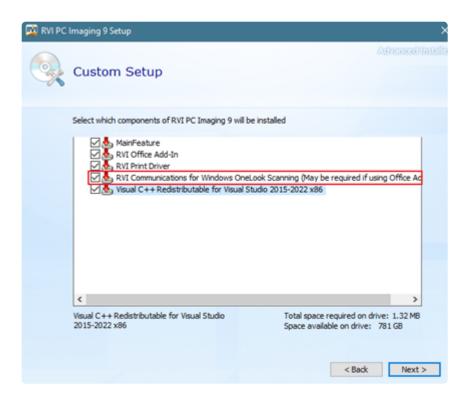
5. Supply User ID (One Look User ID), Name, and Email Address

RVI	Originator Emai	l Address Maintenance	(c) Copyright 2003, RVI
I	<b>F</b>		j
Sk			
_	RVI Originator	Email Address Maintenance	(c) Copyright 2003, RVI
<u>0</u> 	User ID	SCANNER	
_	Name	SCANNER WORKSTATION	
	E-Mail Addr.	SCANNER@REALVISIONSOFTWARE.COM	
-			
-			
	F3/F	12=Exit ENTER=Save	
-			
- [			

# 15.1.15. Setup RVI Communications Server (Twain)

For Twain scanning without the RVI PC Viewer, a default twain device must be set via the RVI Communications Server interace.

The RVI Communications Server is installed by selecting **RVI Communications for Windows OneLook Scanning** inside of the RVI PC Viewer installation package.



Once the communications server is installed, it will load in the pc system tray. It is recommended that you add RVI Communications Server to Windows startup applications.

If you do not see the RVI Socket icon in the system tray, manually start the communications server from C:\Program Files (x86)\Real Vision Software, Inc\RVI Tray for OneLook\RVICommunications.exe

Right click the RVI Socket icon and select **Settings**.

Select the Twain Device using the drop down list. The list of available Twain devices is determined by the twain driver(s) installed on the pc.

User

HTTP Address

Data Queue Not Connected

RVI Communications Server ×	
TWAIN Device	
TWAIN Devices	
Kofax Software VRS - TWAIN	
Screen Scrape	
Enable Screen Scrape	
Hotkey Enabled	
iSeries DataQueue Users	
Connect to IBM i	
Library	
IBM i User	
Address	
User	
Password	
O IBM i Common User With Defined User	
HTTP Address	

### 15.1.16. Setup SSL Configuration for IBMi

The HTTP SSL configuration is outlined in: <u>HTTP SSL</u>

IBM i Common User With PC User (AD)

OK

Once the HTTP SSL configuration is in place, you have the option to continue as is or add the WSS SSL configuration.

The WSS SSL configuration is outlined in: WSS SSL

## 15.1.17. Setup/Maintain IBMi Host Socket

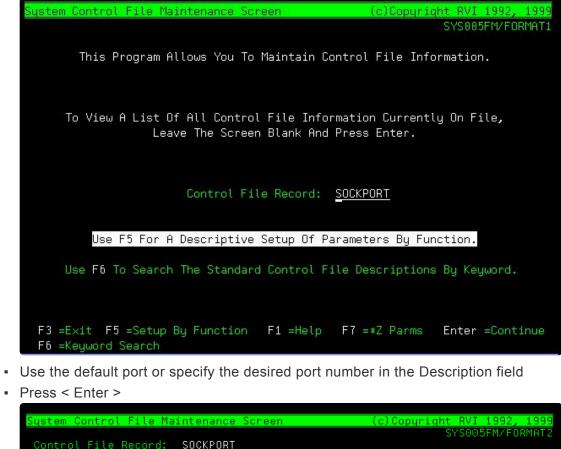
The HOST socket provides connection between the IBMi and the One Look browser.

#### 1. Create RVI Data Queue (RVIDQ)

- CALL RVDQD
  - If you see **F10 = CrtDtaQ** at the bottom, press **F10** to create the data queue.
    - If F10 is not found that means the RVI Data Queue is already created.

			(c)Con	∣riqht RVI	1992.	1999
Press F5 to find entries for	Hear'		(0)0000		DFM/TSU	
	user			n v D Q	0110/130	DOTE
DtaQue Library: RVILIB90						
X=Show Entry						
C=Clear User Entries						
<u>User</u>	Entry					
Press F5 to populate	list - 0	entries in	Data Queu	ie –		
Page Up =Previous Page F5 =F	ofrech F	10 - 0 + 0 + 1	D Dage	Down -Nex	+ Page	
F3 =Exit F7 =DataQ Descrip	TION F9	=Remove Ht	t Entries	Enter =Co	ntinue	

- Decide on a port number. The default port is 8888.
- It is the customer's responsibility to open the port if needed.
- Setup the port number as system control file parameter SOCKPORT in sysovrpf.
  - From a command line with RVILIB in your library list:
    - Type GO IMAGE
    - Option 8 Maintenance Menu
    - Option 6 Maintain System Control File Parameters
    - Type **SOCKPORT** in the Control File Record field.
    - Press < Enter >





#### 2. Start the HOST Socket

#### CALL RVSTRSOCK

If the socket is running, you will see the job under WRKACTJOB

Paran	neters or o	command	
===>	WRKACTJOB	SBS(QBASE)	JOB(RVISOCKET)

			Work with	Active	Jobs		
CPU %:	.0	Elapsed t	time: 00	:00:00	Active :	jobs: 236	
2=Char	tions, press nge 3=Holo < with spool	d 4=End	5=Work 13=Disc			7=Display message	
	osystem/Job RVISOCKET	User MONTY	Type BCH	CPU % .0	Function CMD-RUNJVA	Status TIMW	

By default the job will run in QBASE. To deviate from the default, set control file parameter SOCKJOBQ to the desired subsystem.
 From a command line with RVILIB in your library list:
 Type GO IMAGE
 Option 8 Maintenance Menu
 Option 6 Maintain System Control File Parameters
 Type SOCKJOBQ in the Control File Record field.
 Press < Enter >

To end the job at anytime, CALL RVENDSOCK

**NOTE:** If **CALL RVSTRSOCK** does not run, it is likely due to an older version of java. Contact <u>RVI Support</u> to get a back level program.

#### 3. Setup One Look User ID to use Data Queues

- From a command line with RVILIB in your library list:
  - Type GO IMAGE
  - Option 8 Maintenance Menu
  - Option **7** Maintain PC Workstation Configuration
  - Search for the One Look User ID
    - If found, put an X next to the User ID
    - If not found, press **F10** = Add A Record
    - Set Image Viewer = F or E

**NOTE: F** is used when scanning from green screen bypassing the One Look browser to go directly to the RVI PC Viewer for scanning. **E** is used when scanning from green screen sending the index values specified in the green screen to the One Look browser then automatically over to the RVI PC Viewer for scanning. If you are taking the scan option from the One Look browser, not the green screen, you can use E or F for the Image Viewer value.

- Press < Enter >
- **F3 =** Exit

Maintain PC Workstation Configuration Screen	(c)Copyright		
	CRT	FRVIFM/CNT	100D4
Your Device Name: QPADEV00	001		
Device / User: <u>MCKENZY</u>			
Mapping Types: <u>F</u> (D,Y,F,H,S,N,I	U,T,1,2,3)		
Spool File Viewer: <u>N</u> (Y=GUI Viewer	,		
N=Green Scre	en,		
P=PDF Format	,		
T=Text)			
Image Viewer: <u>F</u>			
DataQue to Socket Using Onelook, No Polling	, Scanning To ∖	/iewer	
Default Printer:			
Delete Code: 🔤 (D=Delete)			
Press F1 For Mapping Types And Image View	er Codes Explar	nation	

Now when One Look browser is opened, in the top left corner, you should see (Host Socket – Connected).

Image Inquiry (Host-Socket Connected)	~	]
---------------------------------------	---	---

If you do not see (Host Socket – Connected), verify that the RVI PC Socket is NOT running in the pc system

tray. If the RVI PC Socket icon is displayed in the system tray, right-click the icon and select EXIT.

#### 4. Setup RVI PC Viewer EHLLAPI

**NOTE:** For RVI Cloud based customers, refer to <u>Setup RVICLOUD EHLLAPI</u>. Do not use the steps outlined in Setup RVI PC Viewer EHLLAPI.

- From the menu at the top of the RVI PC Viewer:
  - Select Host/Disconnect
  - Select Host/EHLLAPI
    - Choose IBM DATA QUEUES
    - Enter the IBMi server ip address, user id, and password

Preferences			
<ul> <li>General</li> <li>Screen Scrape</li> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	You may change your EH following: NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL CO IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1		
	Library DQ Type IBM i Address IBM i User IBM i Password	RVILIB IBM i User  I2.26.223.217  johr	
		OK Cancel	
Click <b>OK</b>			

• Close the RVI PC Viewer

**NOTE:** The user id and password used in the RVI PC Viewer under **Host/EHLLAPI/IBM DATA QUEUES** MUST match the user id and password used to login to One Look.

If there will be multiple users on the workstation, navigate to C:\RVI\rvits.ini to set RunTS = 1 to allow the application to store a login for each user.

📕 *rvits.ini - Notepad —		×
File Edit Format View Help		
[MultiUse]		
IMAGEFOLDER=FTP://ipaddress/IMAGE/		
DeleteIniFiles=0		
RunTS=1		
USEROAMING=0		
[OPTIONS]		
EMBEDSIG=0		
[DLL]		
EEH_LASTSESSION=74		
[ALL USER DEFAULTS]		
DLL=PCSHLL32.DLL		
USEMSFTP=1		
[ALL USER OVERRIDE]		
WINUSER TO DEVICE=0		
RUNUPLOADONIMPORT=0 ;runs the upload button regardless of whether it is	; visible	e
SHOWUPLOAD=0 ;shows the upload button in the index window		
[TRACEEXEC]		
TIMER=0		
TRACE=0		

Now when the RVI PC viewer is opened, in the bottom right corner you should see **Connected: IBM DATA QUEUES** 

<u>៧</u> R	RVI li	mage (	System	9										_			×
lmag	e	Scan	Host														
5	ţ	$\leftrightarrow$	K)	Çii			٠	Ð	+	М	•	M	Goto	6	7	<u>×</u>	
Read	y			Doc	cument	0 of 0		(n	one)			С	onnec	ted: IB	M DAT	ra que	UES

### 15.1.18. Setup RVICLOUD EHLLAPI

This only applies to RVI CLOUD subscription customers. If you are running OneLook on your own server, refer to **4. Setup RVI PC Viewer EHLLAPI** under the <u>Setup/Maintain IBMi</u> <u>Host Socket topic</u>.

Inside the RVI PC Viewer select Host/EHLLAPI:

- Select RVICLOUD
- Setup RVI Cloud Address with the HTTP address provided to you by RVI at the time of setup. An example address would be HTTP://AMD-RVI:8090
- Setup RVI Cloud Username.
- Setup RVI Cloud Password.

Preferences	
General General Screen Scrape Index Options E-Mail External Viewers Disk Caching Signature Pad Scanner Support Auto Import Support FTP Support Internet Support EHLLAPI	You may change your EHLLAPI support type by choosing one of the following:          IBM DATA QUEUES         BOSANOVA         RALLY 32         RUMBA 32         IRMA         FILE         BLUEZONE         z/Scope         RVICLOUD         ✓         Max # Seconds: 60         RVI Cloud Address:         HTTP://AMD-RVI:8090         RVI Cloud Password:         ✓         Poll For Device
	OK Cancel

### 15.1.19. Setup a Common User Swap

Scan stations requiring multple user logins can utilize the Common User Swap option to bypass the requirement to sync logins between the RVI PC Viewer and One Look. Common User Swap allows you to set a common IBMi user id inside the RVI PC Viewer while maintaining individual One Look logins on a single scan station.

From an IBMi command line with RVILIB in your library list:

- Type GO RVMAINT
- Option 17 Maintain User-Specific Parameters

	REAL VISION MAINTENANCE MENU
1.	Maintain Image System Descriptions And Key Fields.
2.	Maintain Image Detail Database Information.
З.	Maintain Color, External Documents And Fax Paths.
4.	Maintain Network Image Printer And Fax Devices.
5.	Maintain Image Staging On DASD, By System Or Document Type.
6.	Maintain System Control File Parameters.
7.	Maintain PC Workstation Configuration.
8.	Clear Temporary Work Folder.
9.	RVI Special Programs For Troubleshooting.
10.	Electronic Customer Support Menu.
11.	IBM 3489 Setup/Maintenance Screen. 18. Signature Capture Menu.
12.	RVI Backup To Tape. 19. List Indexes.
13.	RVI Restore From Tape.
14.	Maintain RVI Customer Specific Menu.
15.	Maintain Z-Option Menu.
16.	Maintain Queued-Z-Option Menu.
17.	Maintain User-Specific Parameters.
	ection or Command 90 =Signoff
===	> 17

• Put an X next to Common Onelook User Swap

User-Specific Parame	eters	(c)Copyright	RVI	1992,	1999
			RVUS:	LFM/FO	RMATO
X=Selec             	Image Security By User Option Security By User Index Level Security By User Internet User Profiles Internet User Access (Customer Routing Pop-A-Queues Screen Scrape Indexing Pop-A-E Routing Workbasket Access Routing Destinations User Index Maintenance Restric Run Parameters Common Onelook User Swap Twain Scanning Users Remove A User	Security) Baskets	KVUS.		

• Press F10 to Add User

· · ·								<u></u>	
8	Common	OneLoc	ok User (	Swap	(c)C	≎opyright	RVI 1992,	1999	
:							RVCU01FM/S	FLCTL	
	X=Sele	ct							
	Positi	on To:							
	X Comm	ion Usi	Descri	otion			Actual	User	
	LEN		COMMON	ONELOOK	USER	SWAP	MONTY		:
									Bottom :
:	F3 =Exi	t		F10 =Ac	dd Use	en	Enter =Con	tinue	
ι.									

• Enter the Common User ID (*the id must be a valid IBMi user id*) and Description.

•											• • •
:	Common	OneLook	(User	Swap	(c)Copyrig	ght RVI	1992,	1999			
:						RVCU	01FM/S	FLCTL			
:	X=Sele	ect									
:	Positi	ion To:									
:	X Comr	mon Usr	Descri	ption		A	ctual	User			
:	LEN		COMMON	ONEL	OOK USER SWAP	M	ONTY				:
:	—										
:								_,			
:			Us	er-Sp	ecific Paramete	ers					
:		Common	User:	ARS	CAN						
:		Descri	ption:	ACC	OUNTS RECEIVABL	E SCAN	NER				
:											
:		F3 =Ex	(it		En t	ter =Co	ntinue				
:										Botto	m :
:	F3 =E							ue			
:											
: .											:

• Press F10 to Add Next Entry.



• Enter a valid Onelook user id.

Common OneLook User Swap	(c)Copyright RVI 1992, 1999
	RVCU02FM/FORMAT2
Common User:	ARSCAN
Sequence:	00
Actual User:	MCKENZY
Delete Code:	(D=Delete)

Repeat the steps as needed to add additional user ids.

Common OneLook User Swap		Copyright RVI 1992, 1999
Common User: ARSCAN	ACCOUNTS RECEIVABLE S	CANNER RVCU02FM/CATLSTC
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	3
Opt Sequence Actual User		
00 MCKENZY		
01 SANDY		
02 PAUL		

Inside the RVI PC Viewer, add the Common User ID under Host/EHLLAPI/IBM DATA QUEUES

Preferences		
<ul> <li>General</li> <li>Screen Scrape</li> <li>Index Options</li> <li>E-Mail</li> <li>External Viewers</li> <li>Disk Caching</li> <li>Signature Pad</li> <li>Scanner Support</li> <li>Auto Import Support</li> <li>FTP Support</li> <li>Internet Support</li> <li>EHLLAPI</li> </ul>	You may change your EHLLAPI support type by choosing one of the following: NONE JWALK MICROSOFT NETSOFT 32 HLLAPI32 IBM PERSONAL COMM. IBM DATA QUEUES BOSANOVA RALLY 32 Polling Interval: 1 Max # Seconds: 60	^ ~ •
	LibraryRVILIBDQ TypeIBM i UserIBM i Address12.27.233.218IBM i UserARSCANIBM i Password*******	<b>•</b>

Now mulitple users can login to One Look on a single scan station without changing the IBMi User ID inside the RVI viewer.

### **15.2. Contact Real Vision Software**

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