ONE LOOK – IBMi / Cloud

Real Vision Software, Inc.

Enterprise Content Management (ECM) Software

Table of Contents

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 **Real Vision Software** 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 [Real Vision Software](#) today to find out if we can work with your software!

HUBER & ASSOCIATES
EDS
INNOVATIVE
NET DATA
ACCUFUND
FRESCHE
DAFFRON
GG PULLEY
INFINITEC
JACK HENRY
JANO JUSTICE
JD EDWARDS
TL ASHFORD
THOMSON REUTERS
DYNAMICS
FATHOM

QUADRANT
LOAD DOCS
LOOK SOFTWARE
IBM FAST FAX
PEERLESS
PARISH SOFT
PROFOUND
ROCKET
VISION SOLUTIONS
TMW
CARDINAL
FISERV
FAXSTAR
LTL2000
HTE / SUNGARD/Superion
TRIPPAK

3. INSTALLATION

Requirements:

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

Installation:

Contact **RVI Support** for installation.

Setup and Testing:

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

4. CONFIGURATION OPTIONS

One Look **DISPLAY** configurations:

- One Look displaying images as PDF in the browser

- One Look displaying images as TIF in the RVI PC Viewer

- 5250 emulation calling One Look displaying images as PDF in the browser (See 5250 Configuration Options for details.)

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

- One Look calling the RVI PC Viewer

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 No Preview Available for instructions on how to setup Google Chrome to view Office documents.

This is the default PDF display in the One Look browser.
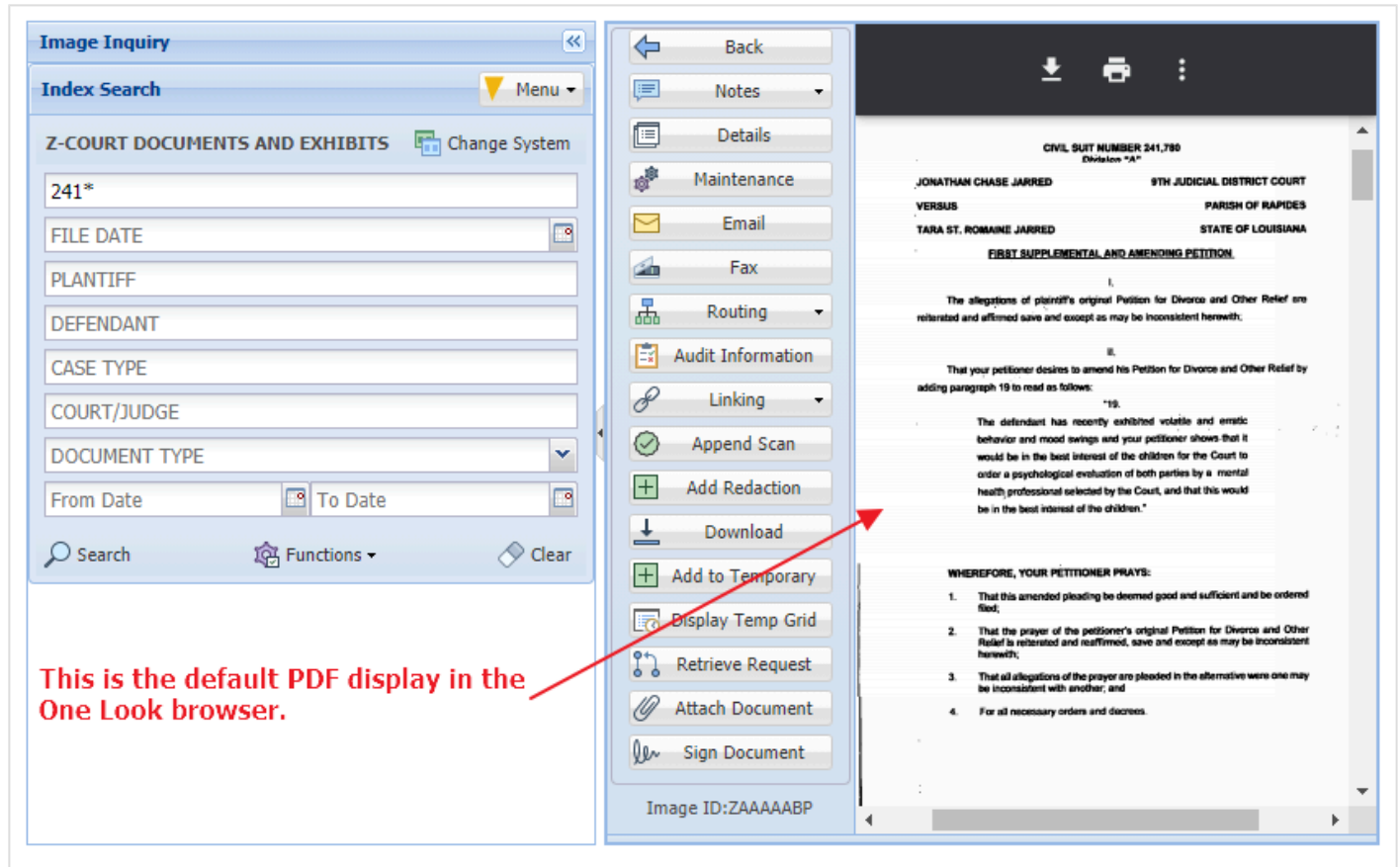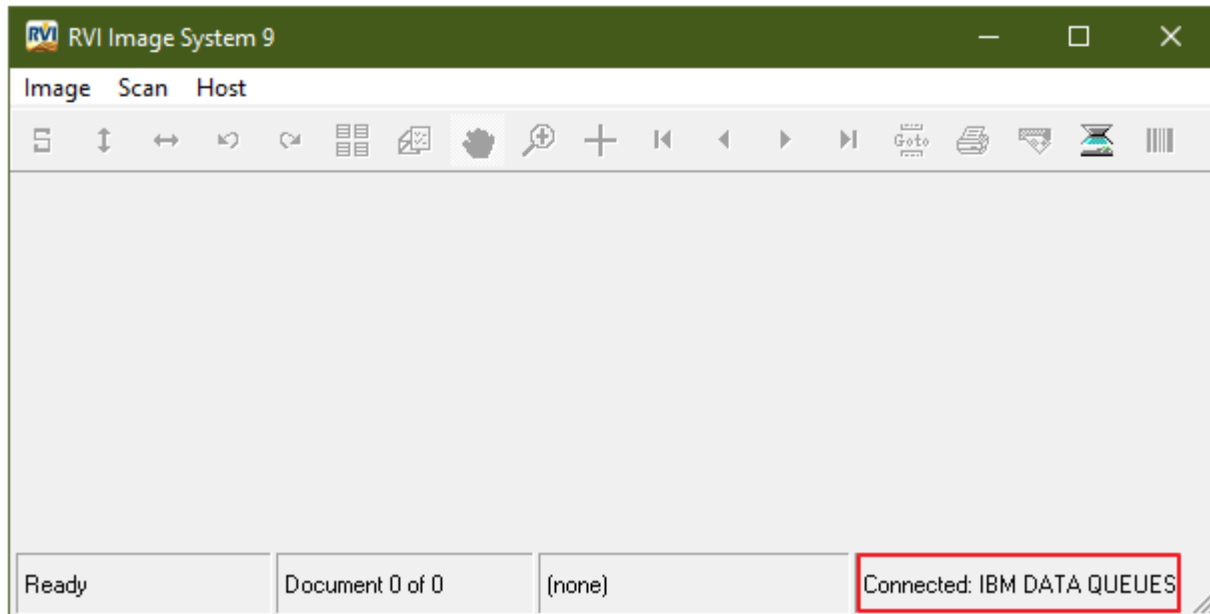
4.2. TIF Display in RVI PC Viewer

> ❗ This configuration is necessary when using Image Markup.

Requirements:

- The user must have a 5250 Configuration of E or F

- The RVI PC Viewer must be installed and show **Connected: IBM Data Queues** in the bottom right corner.

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

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

If One Look is not connecting to the Host Socket, verify the socket is running using the instructions under Setup/Maintain IBMi Host Socket.

To view as TIF, click the **Viewer/PDF toggle button** or **Session Settings/RVI to Viewer** in the top right-hand 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

RVI TO VIEWER OPTION

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.
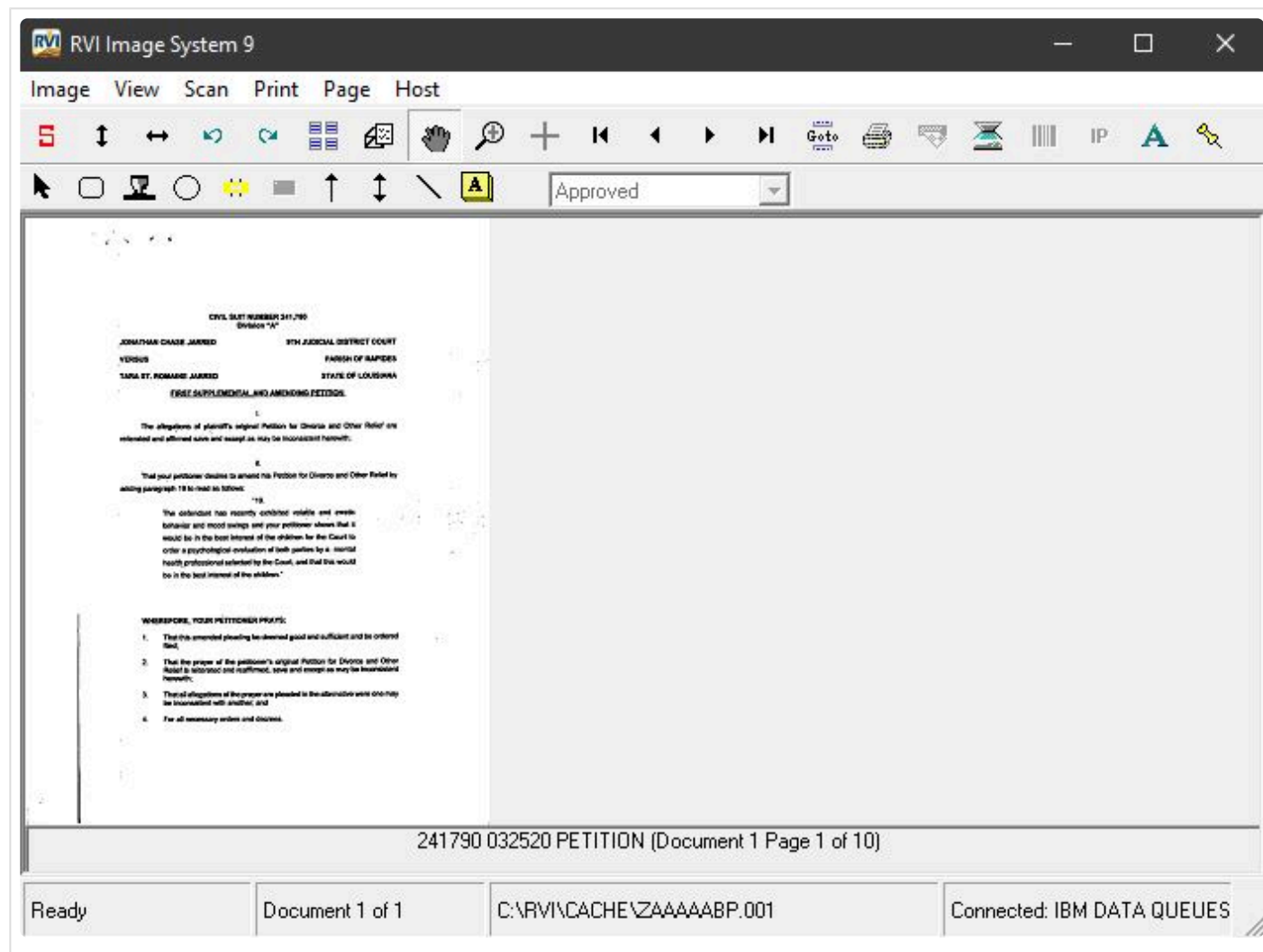
4.3. OneLook – 5250 Configuration Options

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 **X** next to the record to edit.*)
4. Set Image Viewer to O, P, E, F, G

```
Maintain PC Workstation Configuration Screen    (c)Copyright RVI 1992, 1999
                X=Select A Mapping Type                    CRTRVIFM/CNT100D5
 _ D,Y=Data Queue    _ S,N=Folders        _ 1=FTP-TCPADDX Value
 _ F=FTP             _ U=UNC              _ 2=UNC-SYSTEMX Value
 _ H=HTTP            _ T=TCP-UNC          _ 3=HTTP-HTTPX Value
      X=Select An Image Viewer (For further info, tab to entry field, then F1)
     Yellow Image Viewer types are OneLook-specific
 _ Y=Use Windows Associated Viewer        _ N=Use RVI PC Viewer
 _ V=Convert To PDF, Use RVI PC Viewer
 _ H=Convert To PDF, Hyperlink To Browser
 _ I=Index List in Browser, Display In Browser
 _ J=Index List in Browser, Display In RVI PC Viewer
 _ K=Index List in RVI PC Viewer, Display In RVI PC Viewer
 _ R=Index List in Green Screen, View in RVI PC Viewer, No HLLAPI
 _ L=No HLLAPI, Display in RVI PC Viewer
   M=Index List in RVI PC Viewer, Display in RVI PC Viewer, No HLLAPI
 _ O=Index List in Green Screen, View in OneLook, Using Polling
 _ P=Index List in OneLook, View in OneLook, Using Polling
   S=DataQue to Socket From Green Screen, No HLLAPI
 _ E=DataQue to Socket Using OneLook, No Polling
 _ F=DataQue to Socket Using Onelook, No Polling, Scanning To Viewer
 _ G=HLLAPI Support in Onelook, No Polling
 F1 =Additional Image Viewer Description              Enter =Continue
```

4.3.1. 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.

```
Image Inquiry Selection Screen                    (c)Copyright RVI 1992,1999
                    Z COURT DOCUMENTS AND EXHIBITS         DOC003FM/SFHISTCT
 ? =See Routing      A =Audit Inquiry    B =Prev. Version   E =E-Mail Image
 F =Fax Image        I =Include Page     L =Link            M =ManualRestage
 N =Notepad          P =Print Image      R =Route-Profile   S =Staple
 U =Route-User       V =View Image       X =Image Info      Z =Custom Option  +
   00010 RECORDS SORTED BY INDEX 1(A), 7(A). (F10=CHANGE SORT)
     CASE NUMBER      FILE DAT PLANTIFF
  _  241780            20110616 JOHNATHAN CHASE JARRED                    N R
  _  241780
  _  241780
  _  241780
  _  241780
  _  241780
  _  241780
  _  241780
  _  241790
  V  241790
  _  241790


 PgUp =Prev   F2
 F3 =Exit F4 =Cl
```

| Back |
| Email |
| Download |
| Add to Temporary |
| Display Temp Grid |
| Retrieve Request |
| Version Document |

Image ID:ZAAAAABP

CIVIL SUIT NUMBER 241,780
Division "A"

JONATHAN CHASE JARRED   9TH JUDICIAL DISTRICT COURT

VERSUS   PARISH OF RAPIDES

TARA ST. ROMAINE JARRED   STATE OF LOUISIANA

FIRST SUPPLEMENTAL AND AMENDING PETITION

I.

The allegations of plaintiff's original Petition for Divorce and Other Relief are reiterated and affirmed save and except as may be inconsistent herewith;

II.

That your petitioner desires to amend his Petition for Divorce and Other Relief by adding paragraph 19 to read as follows:

"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:

1. That this amended pleading be deemed good and sufficient and be ordered filed;

2. That the prayer of the petitioner's original Petition for Divorce and Other Relief is reiterated and reaffirmed, save and except as may be inconsistent herewith;

3. That all allegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and

4. For all necessary orders and decrees.

Requirements:

1. Active 5250 session

2. RVI PC Viewer shows **Connected:**. (*Only needed if scanning.*)
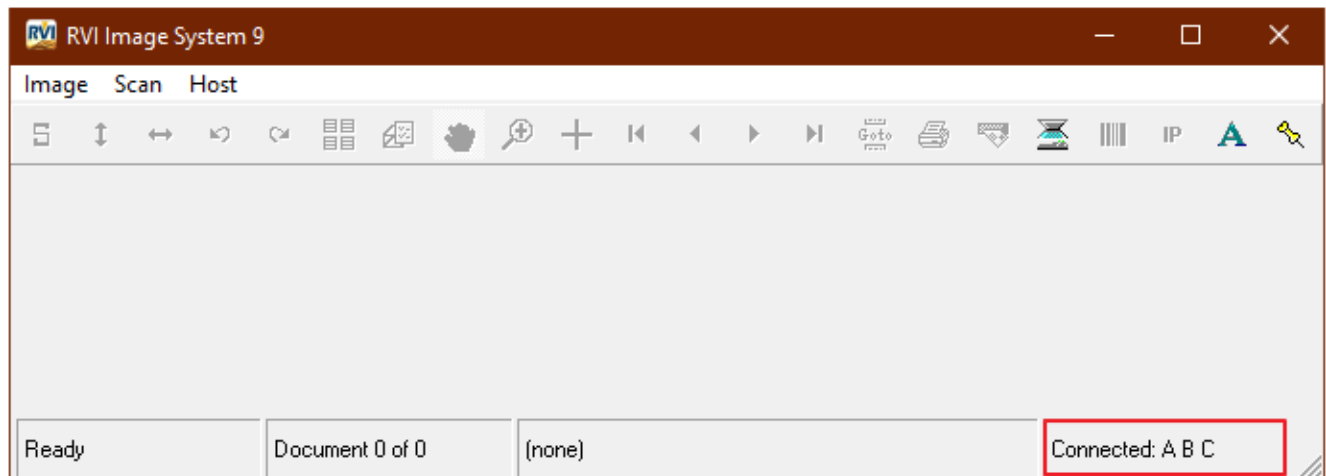
If the viewer is not connecting, verify Host/EHLLAPI is set to IBM PERSONAL COMM.
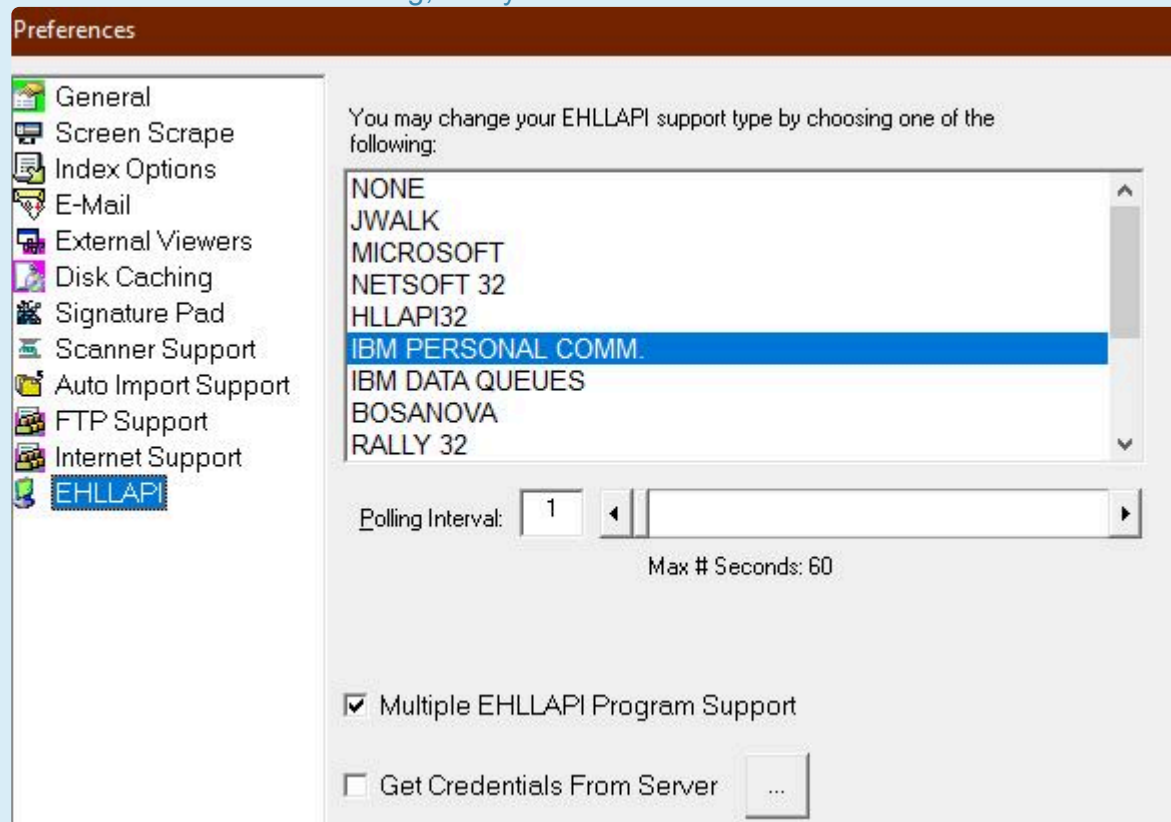
3. One Look browser shows **Host Connected**.

If One Look does not show Host Connected, click here

<u>Function and Output:</u>

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 For An Image System.

              Enter The Desired Image System ID Code.


    To View A List Of All Image Systems On File, Leave The System ID Code
                     Blank And Press Enter.
                                          Image Inquiry Search Screen                    (c)Copyright RVI 1992, 1999
                                                                                                  UDDSSRC2/REQUEST
                                            This Program Allows You To View Images On File For An Image System
         Image System ID Code: Z
                                                        COURT DOCUMENTS AND EXHIBITS


                                            CASE NUMBER          241*_____
         SPOOL VIEWER: PDF (ADOBE)          FILE DATE            _____
            IFS ENABLED (IMAGEL)            PLANTIFF             _____
                 FTP SUPPORT                DEFENDANT            _____
                                            CASE TYPE            _____
F3 =Exit   F7 =Show Type Prompt             COURT/JUDGE          _____
                                            DOCUMENT TYPE        _____           F4=DOCTYP
```

The index subfile list will show up in One Look then the user can select which record(s) to view inside of One Look.

Requirements:

1. Active 5250 session

2. RVI PC Viewer shows **Connected:**. (*Only needed if scanning.*)

✳ If the viewer is not connecting, verify Host/EHLLAPI is set to IBM PERSONAL COMM.

3. One Look browser shows **Host 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 [icon] 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.

The index subfile list will populate in One Look then the user can select which record(s) to view in One Look.

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 Common User Swap for more details.

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

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
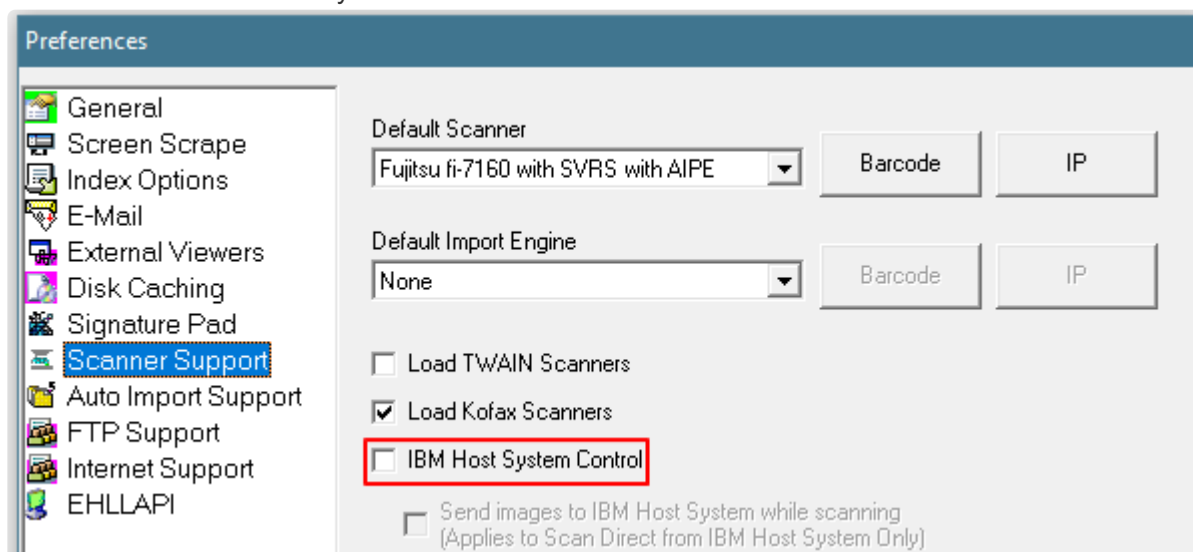
✱   If the viewer is not connecting, verify **Host/EHLLAPI** is set to IBM DATA QUEUES and the credentials are valid.
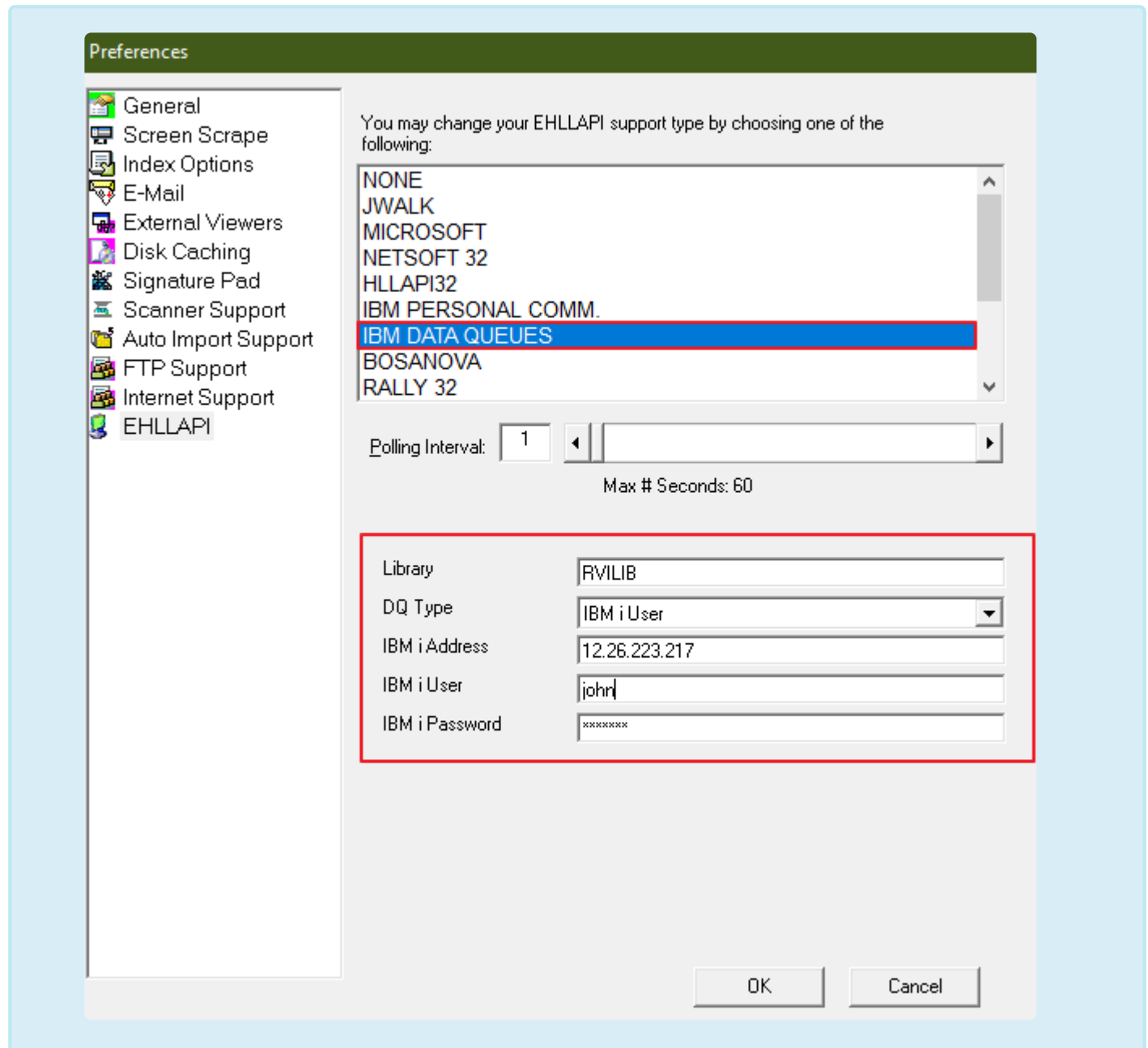
6. One Look browser shows **Host-Socket Connected**.
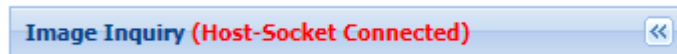
Function and Output:

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
  - **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 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.

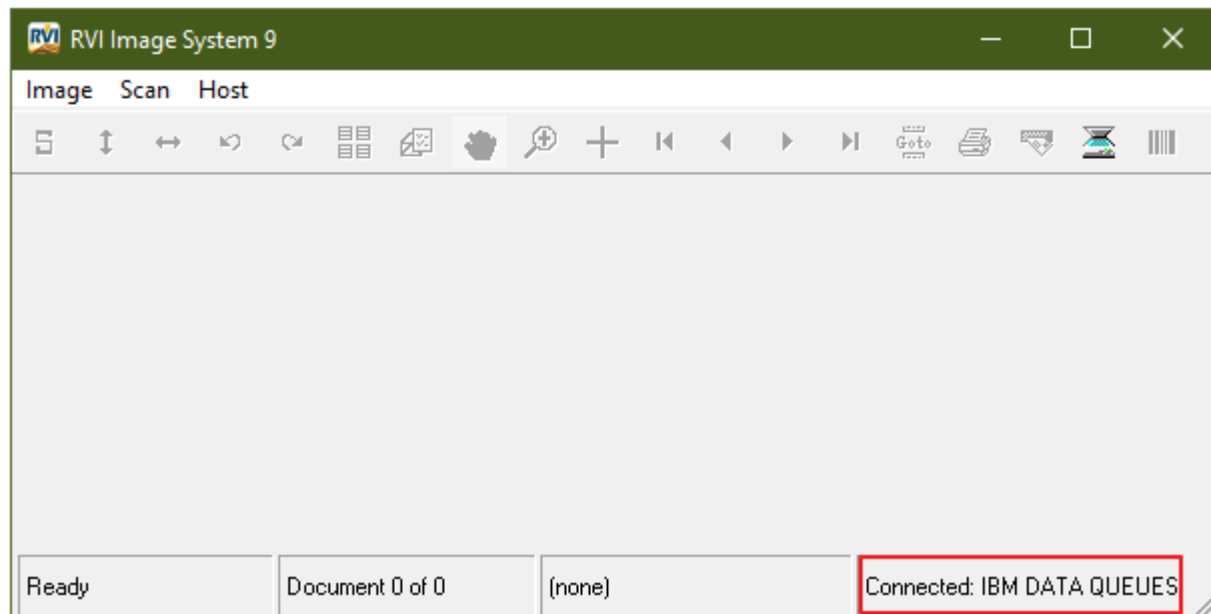Uses green screen inquiry, One Look index subfile list, One Look document display.

The index subfile list will populate in One Look then the user can select which record(s) to view in One Look.

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 Common User Swap for more details.

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

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

5. One Look browser shows **Host-Socket Connected**.
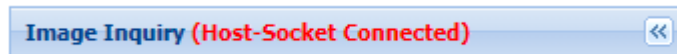
Function and Output:

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 RVI One Look executable 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**

```
System Control File Maintenance Screen          (c)Copyright RVI 1992, 1999
                                                        SYS005FM/FORMAT2
  Control File Record:   *TWTIFF



         Description:   N_____
```

5. LOGIN

1. Open your internet browser.

2. Navigate to **http://ipaddress:port/internet/cmnss/imageinquiry/app/index.html**.

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

3. Enter a valid internet user id and password.

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

Image Inquiry	«

Image Systems	▼ Menu ▾

Total Systems: 38

| System	System Name ▲
2	ACCUF ACTIVITY/JOURNAL
P	ACCUFUND A/R SYSTEM DEMO
O	ACCUFUND ACCOUNTS PAYABLE DEMO
0	ACCUFUND CASH RECEIPT
5	ACCUFUND GRANT ITEMS
S	ACCUFUND PURCHASE ORDERS
Q	ACCUFUND REQUISITIONS
3	ADMISSION IMAGES
9	AP DYNAMICSAX
D	AP SYSTEM
A	AP WORKFLOW SYSTEM
E	AR SYSTEM
G	ARKANSAS STATE TREASURER
d	ARKANSAS STATE TREASURER-DEMO
B	BANKING DDA SYSTEM
F	BANKING LOAN SYSTEM
K	BUNZEL TEST IMAGE SYSTEM
c	CASINO DEMO
Z	COURT DOCUMENTS AND EXHIBITS
C	COURT SYSTEM
7	DEMO SYSTEM FOR JDE INTERFACE
W	DEMO WORK SYSTEM
Y	FIDELITY BANK SAMPLE DATA
X	FULL TEXT SEARCH DEMO

Awaiting System Selection

Page 0 of 0   No data to display

Display Checked   ☰ Display Options ▾

*** Ready to Search ***

(PDF)   Device Id:$00105802   User Id: MCKENZY   © Real Vision Software. All Rights Reserved.

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

6. MENU

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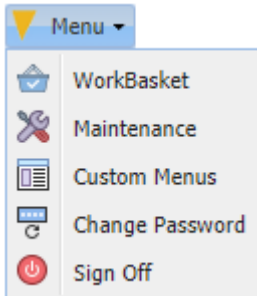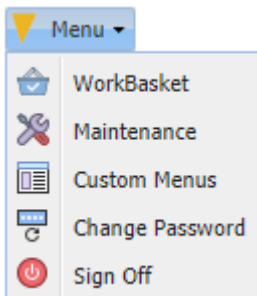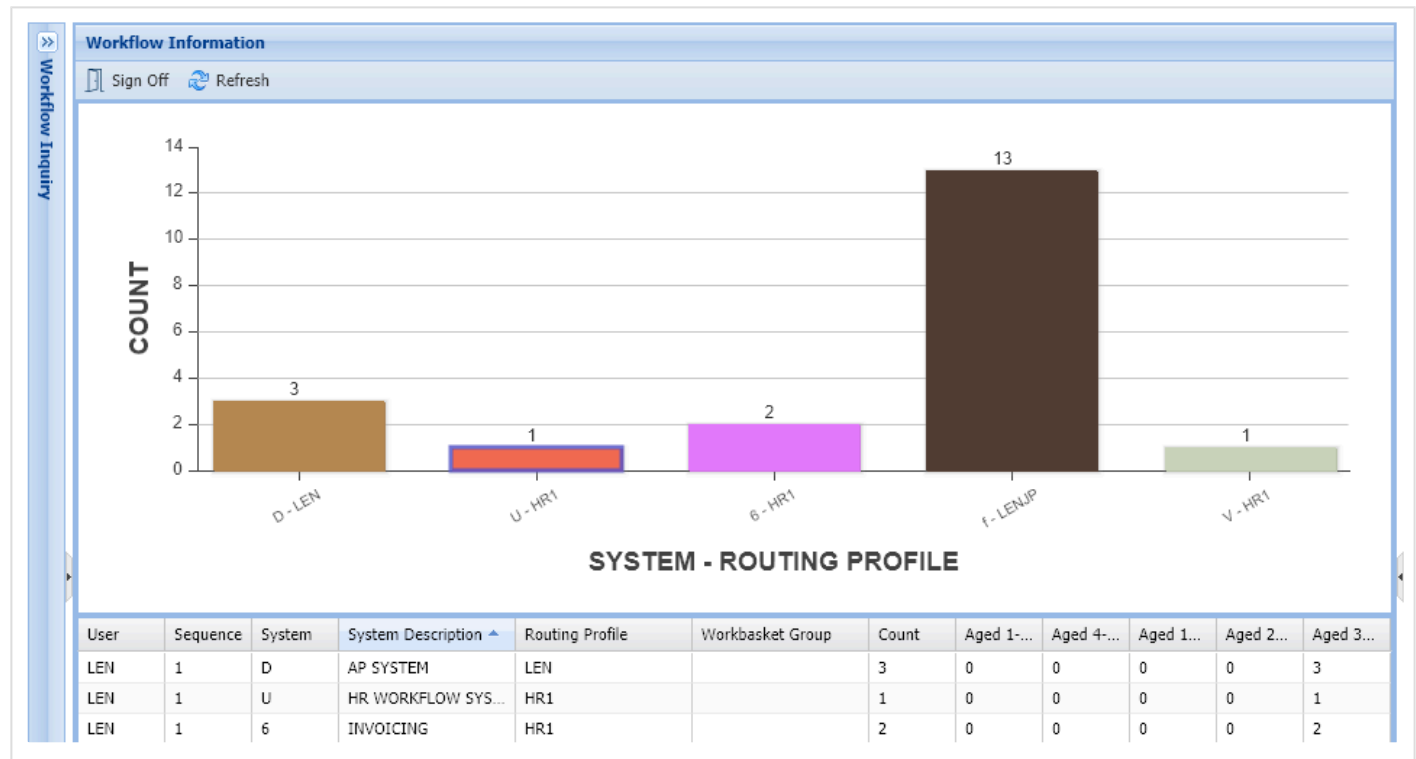

6.1. WorkBasket

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

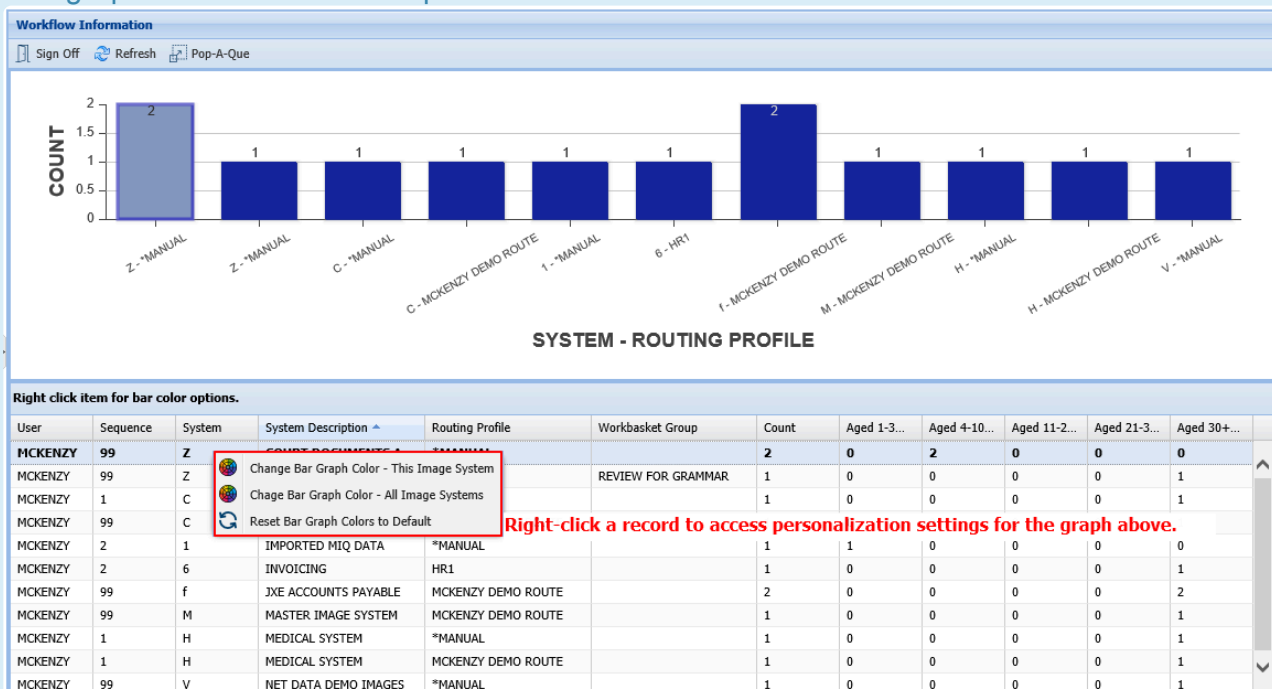To access workbaskets and workflow functions, from One Look:

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.

Workflow Information

⬜ Sign Off   🔄 Refresh

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

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

Workflow Information

⬜ Sign Off   🔄 Refresh   📄 Pop-A-Que

Right click item for bar color options.

User	Sequence	System	System Description ▲	Routing Profile	Workbasket Group	Count	Aged 1-3...	Aged 4-10...	Aged 11-2...	Aged 21-3...	Aged 30+...
MCKENZY	99	Z	COURT DOCUMENTS 1	*MANUAL		2	0	2	0	0	0
MCKENZY	99	Z	🌐 Change Bar Graph Color - This Image System		REVIEW FOR GRAMMAR	1	0	0	0	0	1
MCKENZY	1	C	🌐 Chage Bar Graph Color - All Image Systems			1	0	0	0	0	1
MCKENZY	99	C	🔄 Reset Bar Graph Colors to Default	**Right-click a record to access personalization settings for the graph above.**							
MCKENZY	2	1	IMPORTED MIQ DATA	*MANUAL		1	1	0	0	0	0
MCKENZY	2	6	INVOICING	HR1		1	0	0	0	0	1
MCKENZY	99	f	JXE ACCOUNTS PAYABLE	MCKENZY DEMO ROUTE		2	0	0	0	0	2
MCKENZY	99	M	MASTER IMAGE SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	*MANUAL		1	0	0	0	0	1
MCKENZY	1	H	MEDICAL SYSTEM	MCKENZY DEMO ROUTE		1	0	0	0	0	1
MCKENZY	99	V	NET DATA DEMO IMAGES	*MANUAL		1	0	0	0	0	1

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

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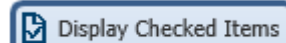
the checkbox under the Flags column to select multiple record(s) then click Display Checked Items .

Display Checked Items is found under Display Options in newer versions of One Look.

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

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

Right-click a line item to access the shortcut menu of functions.

Users have the option to approve and index directly from the display window using the [✓ Approval] and [Batch Indexing] buttons or they can return to the system's workbasket entries using the [← Back] button which provides options for [✓ Que Up For Approval] and [Que Up For Batch Indexing] .
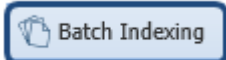
Image ID:UAAAAB63

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

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

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

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

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

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

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

6.1.1. WorkBasket Tools

To watch a video on this topic CLICK HERE

Right-Click Menu

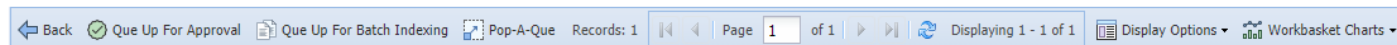|	Show Notes
	Add Notes
	Email Image
	Fax Image
	Show Routing
	Index Details
	Index Maintenance
	Download
	Audit Information
	Z-Options
	Show In Window
	Maintain Staple
	Add to Staple Grid
	Move Profile
	Move Subgroup
	Remove From WorkBasket

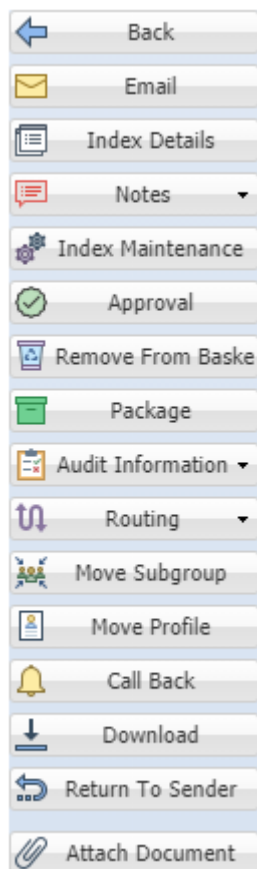|	
Show Notes	Display existing notes and add new notes.(*Will only appear if notes exist.*)
Add Notes	Permits the user to type a note. If there is a note attached to an image, will appear at the left side of the index listing under the Flags column.
Email Image	Email the selected document.
Fax	*Contact RVI Support 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. (*The staple grid is cleared automatically when the user logs off.*)
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	Return to the list of workbaskets.
Que Up For Approval	Sequentially work all items in the workbasket routed for approval or disapproval.
Que Up For Batch Indexing	Sequentially work all items in the workbasket waiting to be indexed.
Pop-A-Que	Work items from a central routing queue. (Only available for users enrolled in Pop-A-Que.)
Records	Number of items in the workbasket.
Display Options	Includes: *Display Checked Items* allowing users to view all flagged items, *Show Row Numbers* to activate numerical designation of each row, and *Grid To Excel* to export the subfile list to an excel spreadsheet.
Workbasket Charts	Graphical representation of a user's workbasket with 4 options: **Aged Items**, **Active-Forthcoming**, **Totals**, and **Approval History**. Users can select from bar, pie, or line formats.

Image Display Top Toolbar

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

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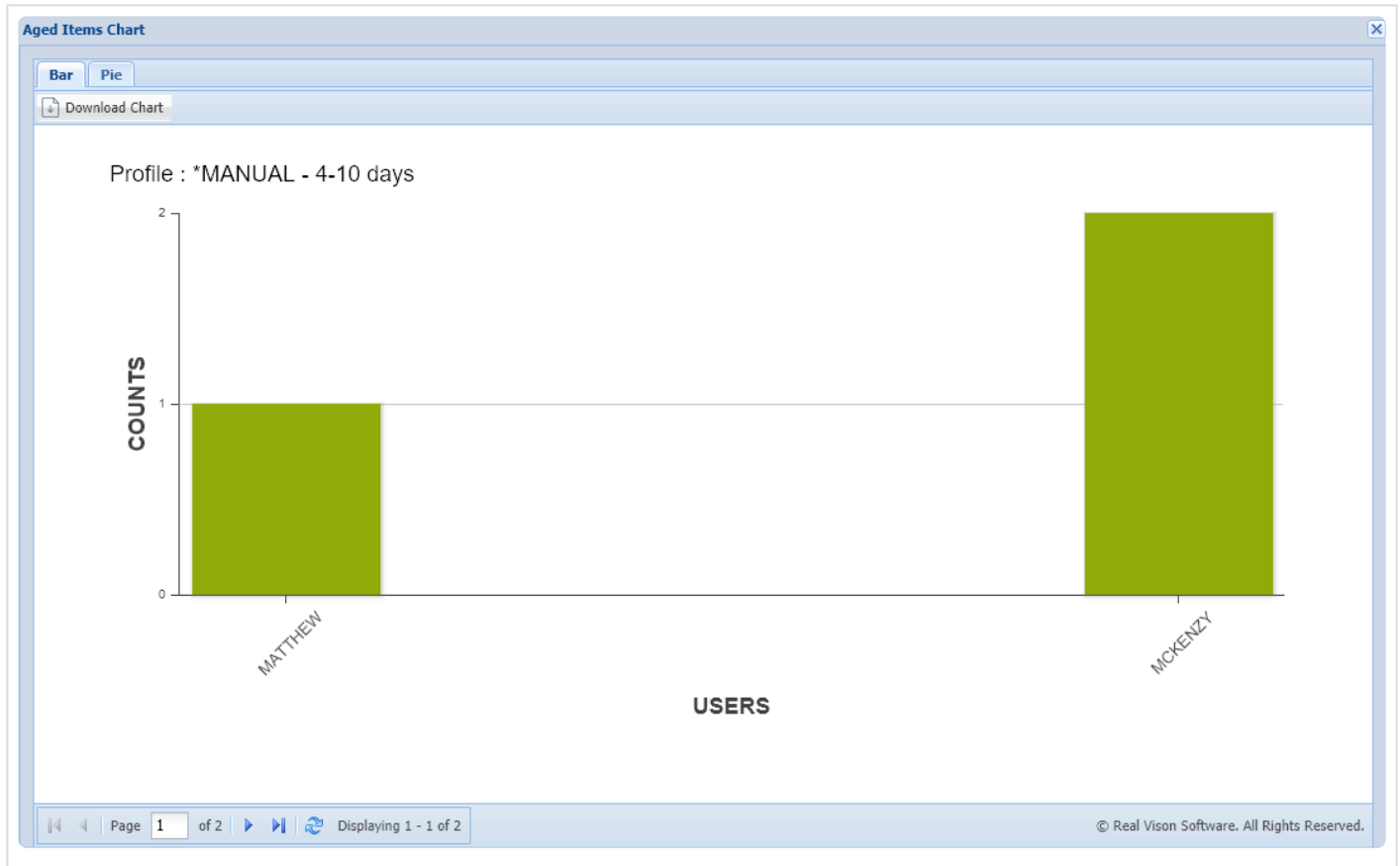
All Items are classified into five categories:

- 1 – 3 Days Old
- 4 – 10 Days Old
- 11 – 20 Days Old
- 21 – 30 Days Old
- 30 + Days Old
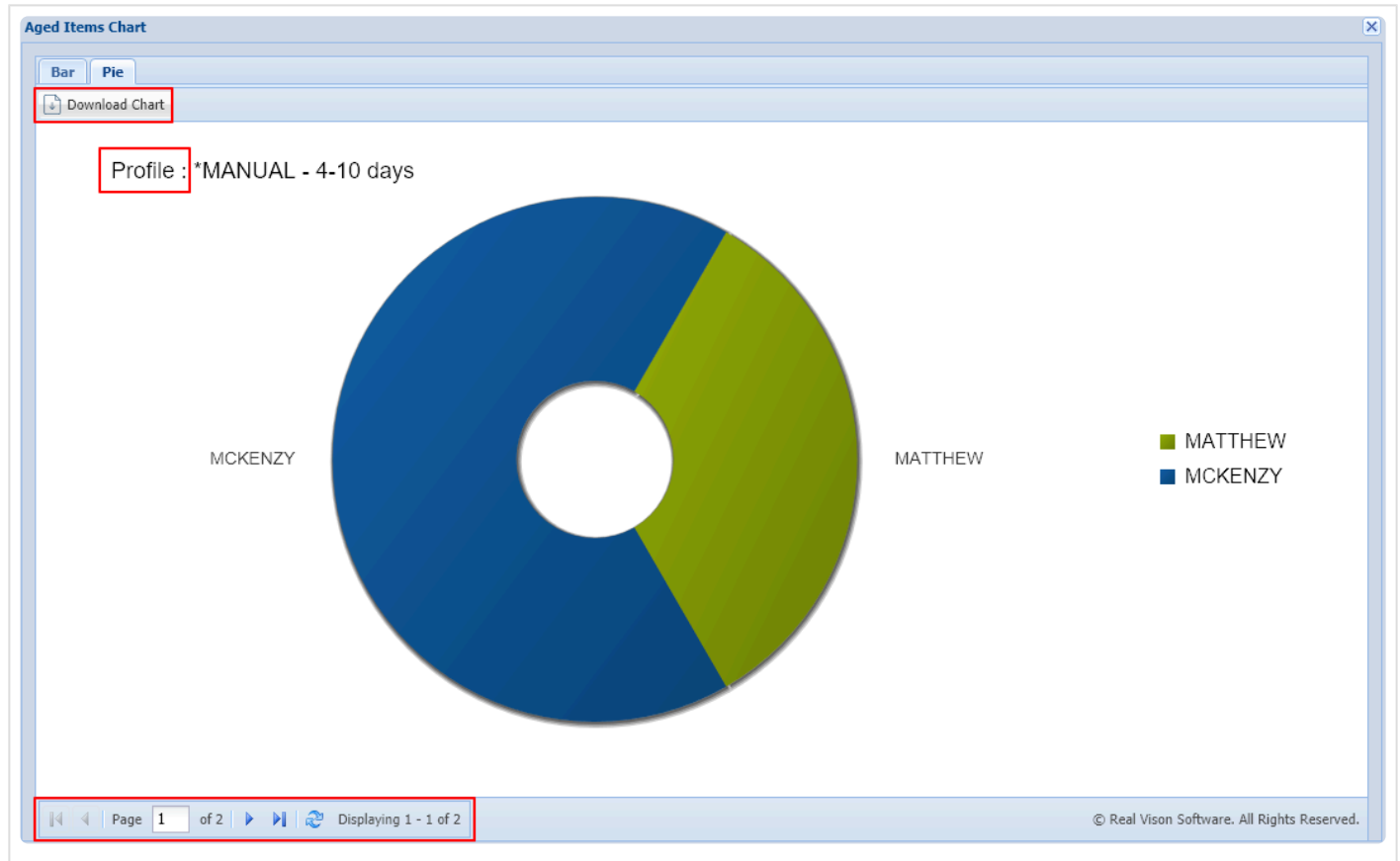
At the top left-hand corner of the chart area, it is easy to find the name of the profile and the category in which the item is sitting in the system.
All of the titles are updated automatically and each item is placed into its proper category respectively.

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.
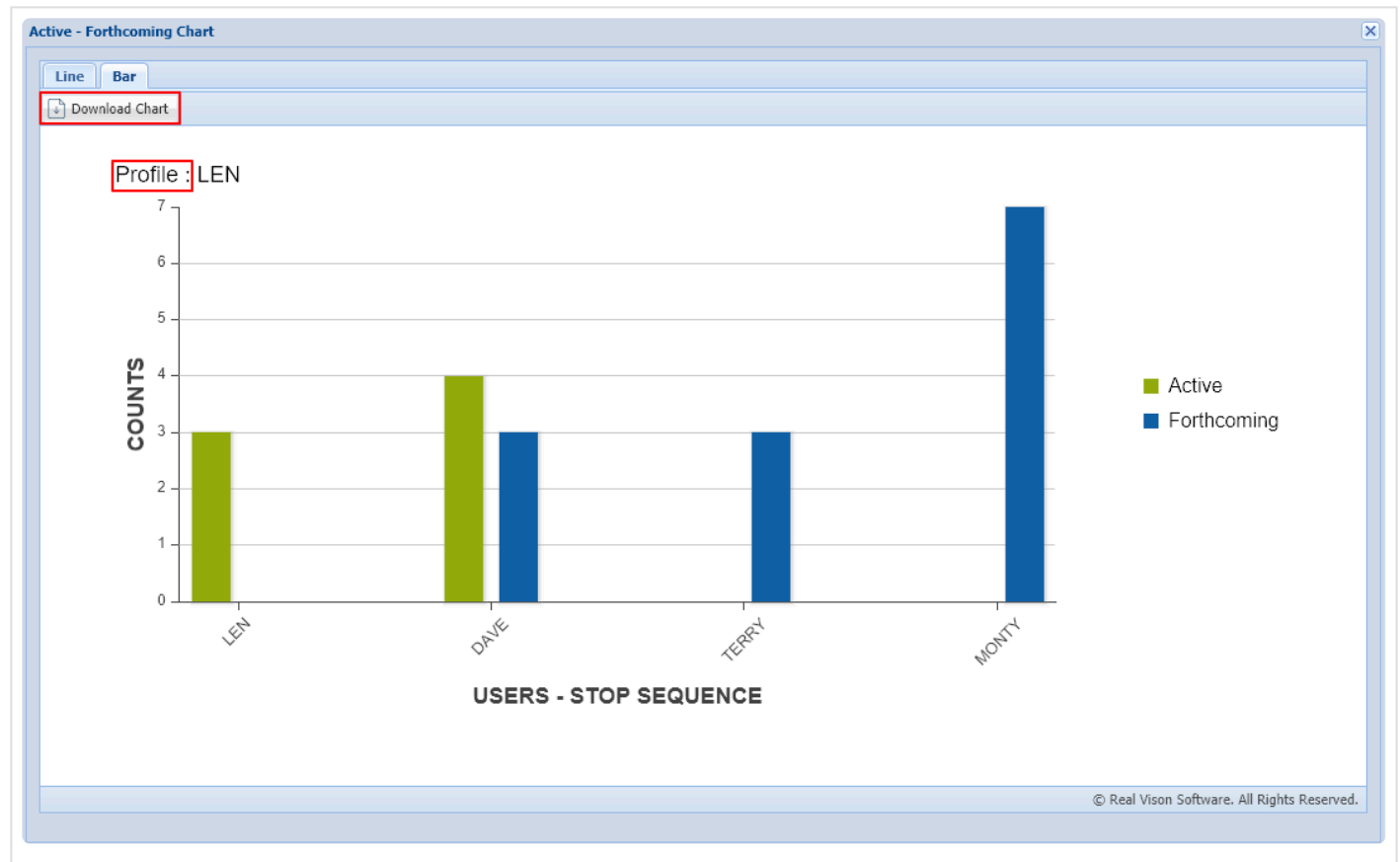
6.1.1.3. Totals Chart

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:

WorkBaskets Totals Chart

| Line | Bar | Pie |

↓ Download Chart   ↻ Refresh Charts

Profile : 1 - IMPORTED MIQ DATA

■ Active
✳ Forthcoming

USERS - STOP SEQUENCE

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Bar Chart:

WorkBaskets Totals Chart

| Line | Bar | Pie |

↓ Download Chart   ↻ Refresh Charts

Profile : 1 - IMPORTED MIQ DATA

■ Active
■ Forthcoming

USERS - STOP SEQUENCE

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Pie Chart:

WorkBaskets Totals Chart ☒

| Line | Bar | Pie |

⬇ Download Chart   ↻ Refresh Charts

1 - IMPORTED MIQ DATA

FREDDY - 3

MONTY - 2

EMILIO - 4

RICHC - 1

FREDDY - 3

MCKENZY - 1

■ EMILIO - 4
■ FREDDY - 3
■ MONTY - 2
■ RICHC - 1
■ FREDDY - 3
■ MCKENZY - 1

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6.1.1.4. Approval History Chart

The Approval History Chart is a visual representation (Bar format) of all items by System that have been approved, disapproved, or batch indexed for the current user for the specified date range.
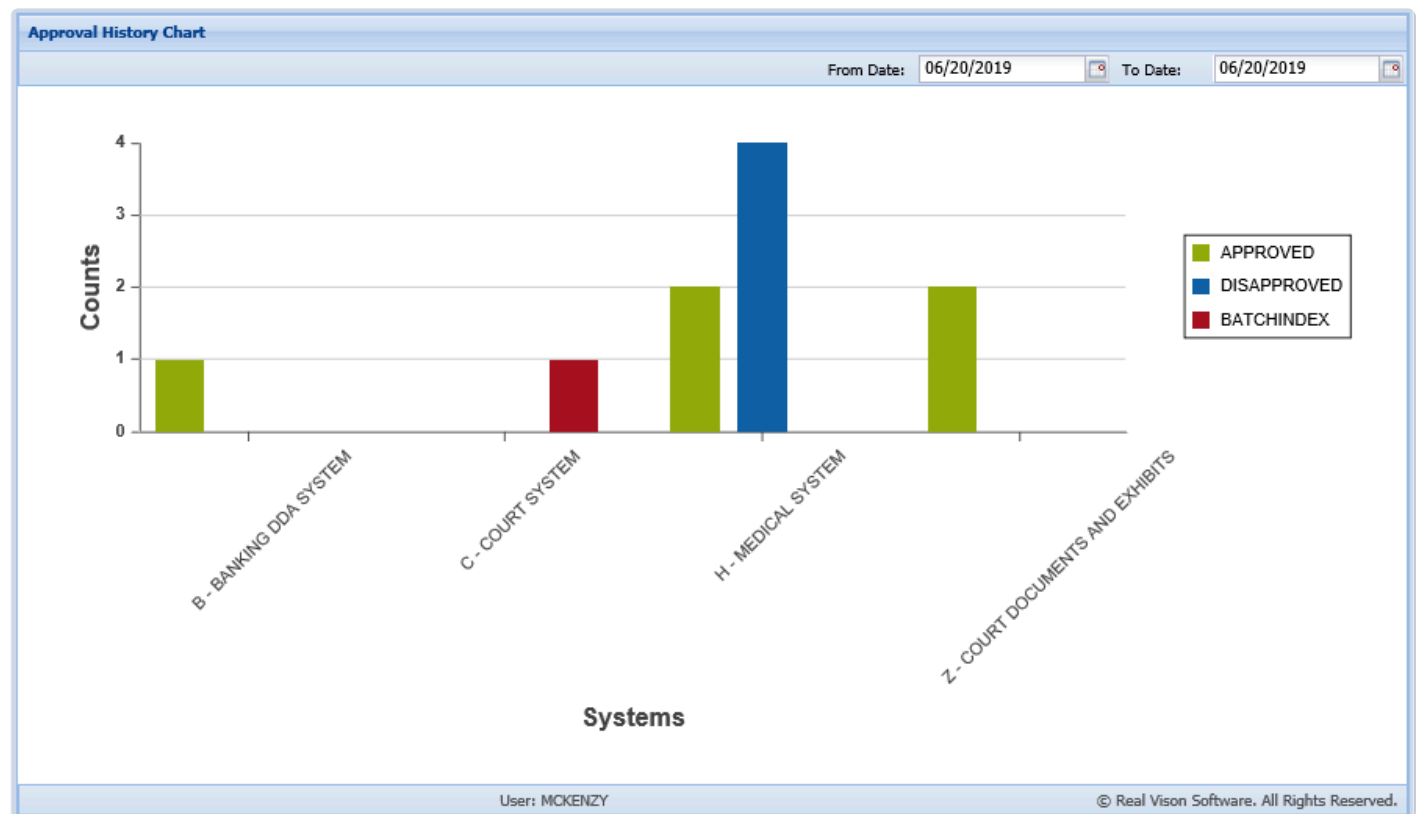
Mousing over the bars will provide additional details by System. To access the approval history of the System, double-click the bar to display the User Audit.
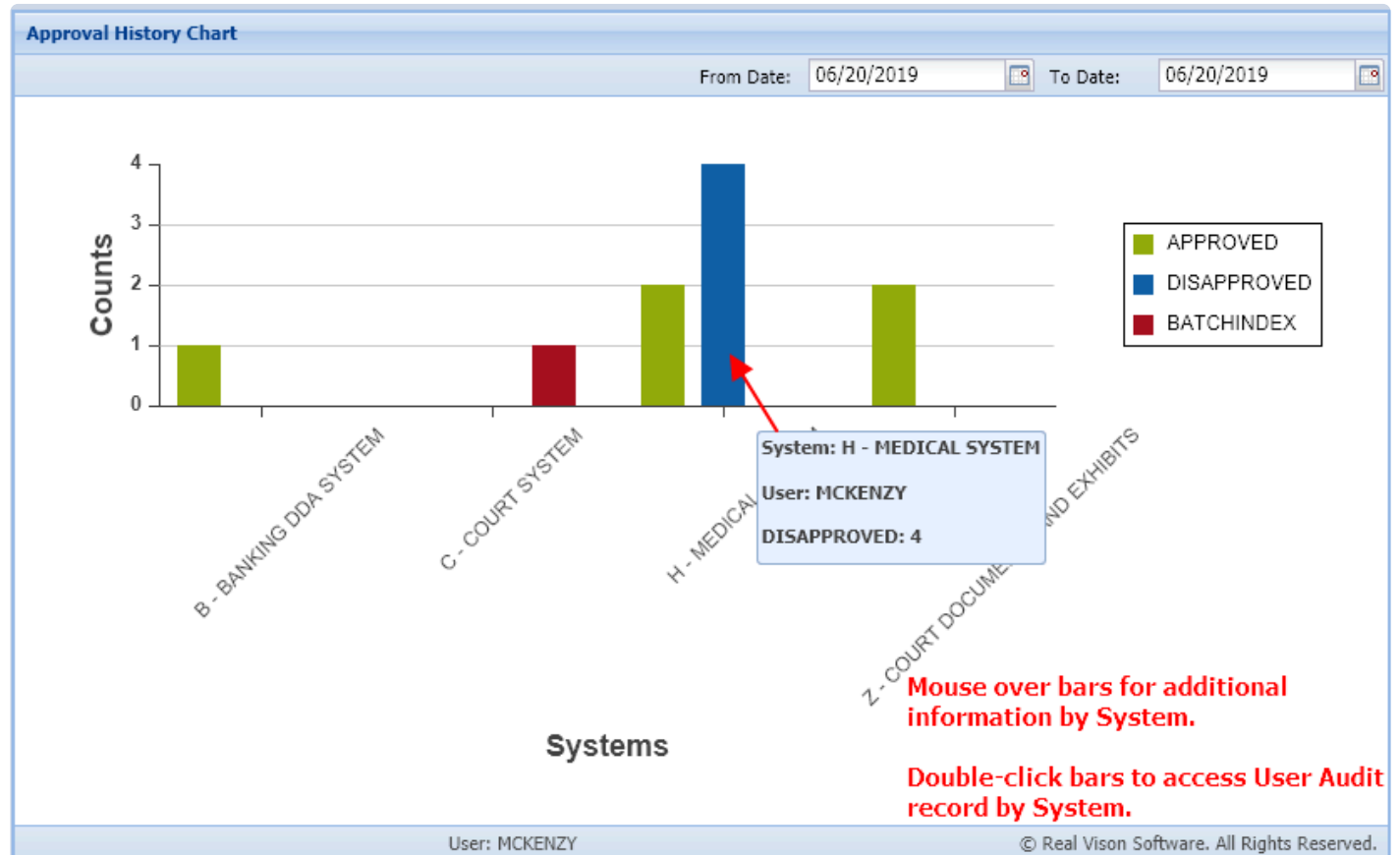
The User Audit provides indexing information and the date/time of the action taken on the record. To access Workflow Audit, double-click the record.

Index 1	Index 2	Index 3	Index 4	Index 5	Index 6	Index 7	Action	Date	Time
12345						APP	DISAPPROVED	06/20/2019	11:51:44
12345						APP	DISAPPROVED	06/20/2019	11:51:26
12345						APP	DISAPPROVED	06/20/2019	11:51:15
240164	01/20/2012					INSURANCE CA...	DISAPPROVED	06/20/2019	11:51:09

User Audit Information — Back Records: 4

Double-click a record to view Workflow Audit.

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

Workflow Audit Information — Back Records: 11

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

6.1.2. Que Up For Approval

To watch a video on this topic CLICK HERE
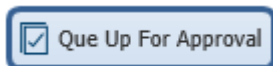
☑ Que Up For Approval

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

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

Submit:	Click Submit to complete the process. This will process the information and place the next available image in the window for action.
Skip:	Ignore the image in the window and hold it in the queue for future action.
Cancel:	Close the approval window and return the image to full screen.
Additional Information:	The user can add descriptive information.
Disapprove / Approve:	The user can select one or the other for this image.
Action Codes:	Permits the user to select from a predefined list of codes. Setup predefined Action Codes 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.
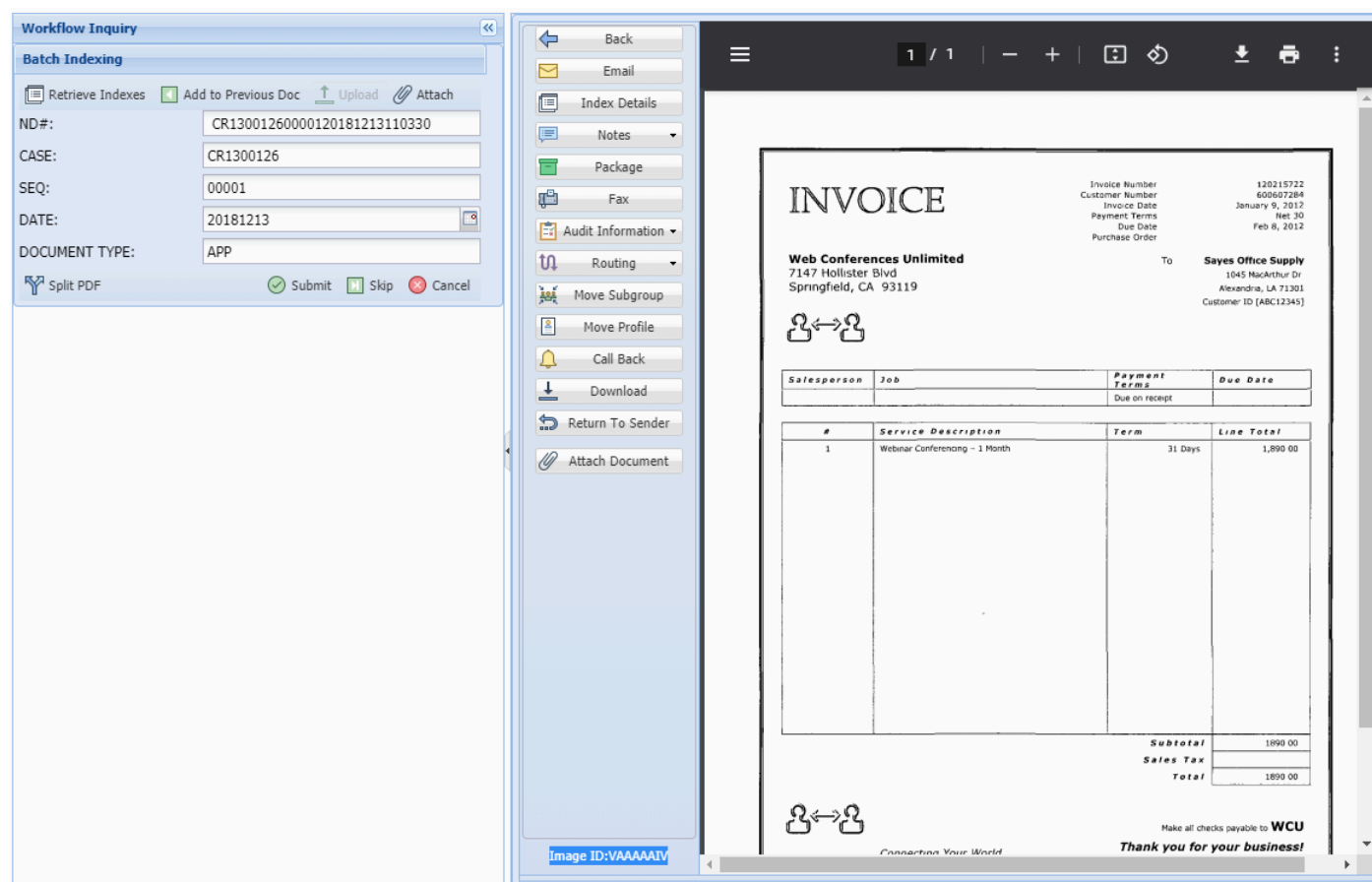
Indexes:	View the index values and file information associated with the document. This is an informational screen and does not permit the user to change any information displayed. If corrections need to be made, they must be accomplished using the Index Maintenance function.
Back:	Return to the list 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.(*The Package icon is only present when a package is setup.*)
Fax:	*Contact RVI Support for requirements.*
Audit Information:	Includes View, Workflow, and Approval audit. Displays the history of the item including view, print, email, change, route, fax, cd, and signature requests.
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, will appear under

	the Flags column. If the call back is currently due, ✋ will appear. If the call back is overdue, ✊ will appear.
Download:	Save the selected document to local storage.
Return To Sender:	Return the document to the previous user in the routing sequence. *This option will only appear if it can be determined that there is a previous user in the routing sequence.*
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.

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

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

	Custom Feature *Will only appear for customers specifically setup for this feature. Contact RVI Support for details on integrating this feature.*
Add to Previous Doc:	Append the document in the window with the previously indexed document.
Upload:	Move the document selected during the Attach process to the RVI system. The Upload button will become active once the Attach option is used.The newly attached document will be available for viewing immediately after the upload.
Attach:	Add additional documents to the currently displayed document using the browse import feature. Select [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.(*The Package icon is only present when a package is setup*.)
Fax:	*Contact RVI Support for requirements.*
Audit Information:	Includes View, Workflow, and Approval audit. Display the history of the item including view, print, email, change, route, fax, cd, and signature requests.
Routing:	Send the document to another Profile or User.
Move Subgroup:	Move the current image to a user defined subgroup within your workbasket.
Move Profile:	Move images to another routing profile if directed to this profile by mistake. When Move Profile is selected, the user will advance to the screen that prompts them to selected the desired routing

	profile from a drop down list. This image will no longer be in this routing profile and no additional stops within the current routing profile will be active. The image will immediately enter into the first stop of the newly selected routing profile. Before this option is selected, be sure that you want to move the image to another profile as opposed to copying the image to another profile.
Call Back:	Enter a target date that will trigger a future notification of an event that needs to occur and a descriptive message for the notification. 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. *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.

6.1.4. Audit

WorkBasket audit details are found in the [Audit](#) section of the documentation.

6.1.5. Pop-A-Que

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

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

Perform the following from the IBMi:

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

```
 User-Specific Parameters                     (c)Copyright RVI 1992, 1999
                                                        RVUS1FM/FORMAT0

              X=Select
                    _   Image Security By User
                    _   Option Security By User
                    _   Index Level Security By User
                    _   Internet User Profiles
                    _   Internet User Access (Customer Security)
                   [X]  Routing Pop-A-Queues
                        Screen Scrape Indexing Pop-A-Baskets
                    _   Routing Workbasket Access
                    _   Routing Destinations
                    _   User Index Maintenance Restrictions
                    _   Run Parameters
                    _   Twain Scanning Users




        F3 =Exit                                      Enter =Continue
    _____
 MA▮    D
```

5. F10 = Add User

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




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

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

```
User's Pop Queues Maintenance (c)Copyright RVI 1992, 1999
                                          RVPQMFM/SFLCTL
  X=Select
  Position To: _____
  X User_____   Description_____
  _ KIMAP          KIMBERLY IN ACCOUNTING
  _ MCKENZY        MCKENZY'S POP A QUEUES
  _ MO
           ┌─────────────────────────────────────────────┐
           │           User-Specific Parameters          │
           │  User. . . .:   MAC_____                 │
           │  Description:   MAC COURT DOC_____ │
           │                                              │
           │  F3 =Exit                   Enter =Continue  │
           │                                           om │
  F3 =E    └─────────────────────────────────────────────┘ue
```

7. F10 = Add Next Entry

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

    Press to continue.

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




                           ┌────────────────────┐
  Page Up =Previous Page    │ F10 =Add Next Entry │     Page Down =Next Page
  F3 =Exit                  └────────────────────┘         Enter =Continue
```

8. Specify a routing profile.

    F8 permits the user to select Routing Profiles from a list.

    Press *enter* to continue.

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



            User: MAC
        Sequence: 01


    Routing Profile:  MCKENZY                          ┌─────────────┐
        Delete Code:  _    (D=Delete)                  │ F8 To Select│
                                                       └─────────────┘







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

Repeat Steps 7 – 8 as needed.

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












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

For those users enrolled with a Pop-A-Que Routing Profile, [Pop-A-Que] will be available during workbasket inquiry.
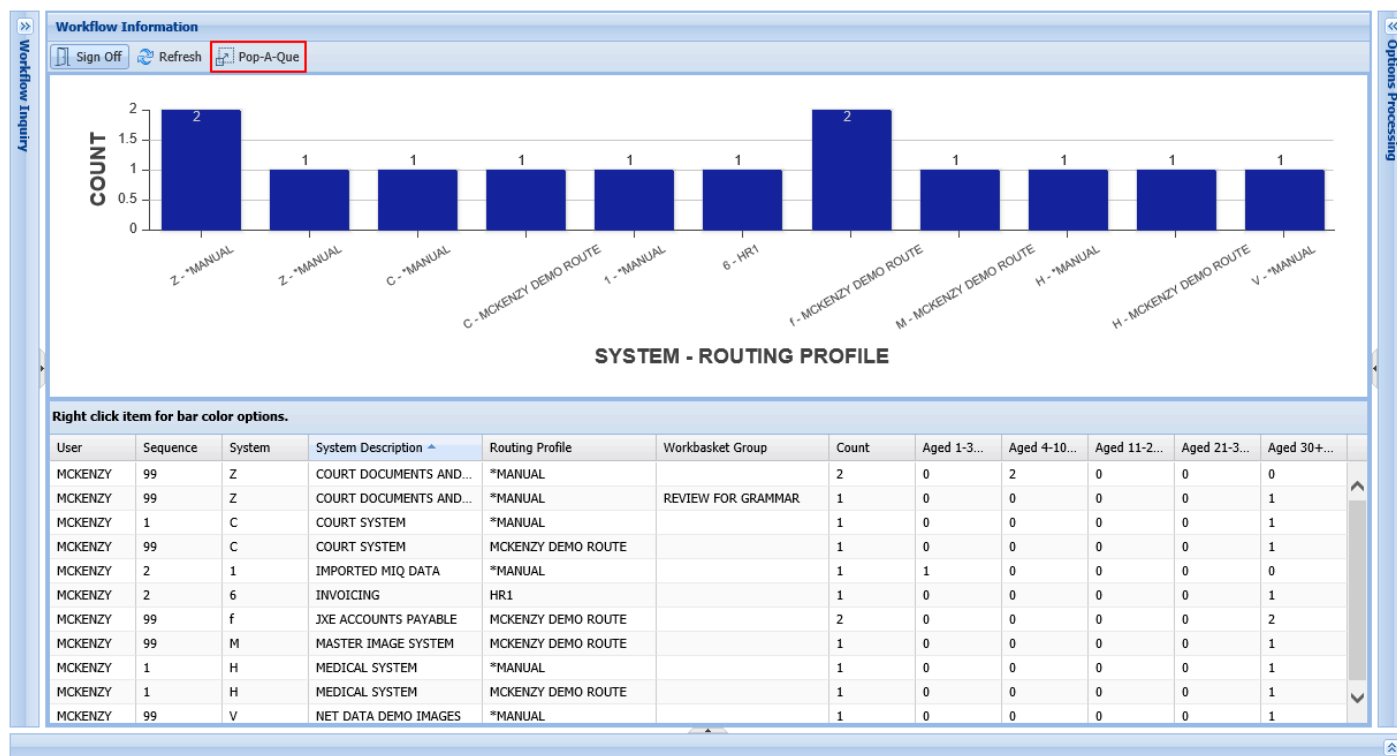
When is pressed:

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

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

6.2. Maintenance

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

1. Select Maintenance from the Menu drop down list.
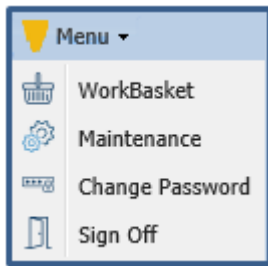
2. Login to the Maintenance menu.
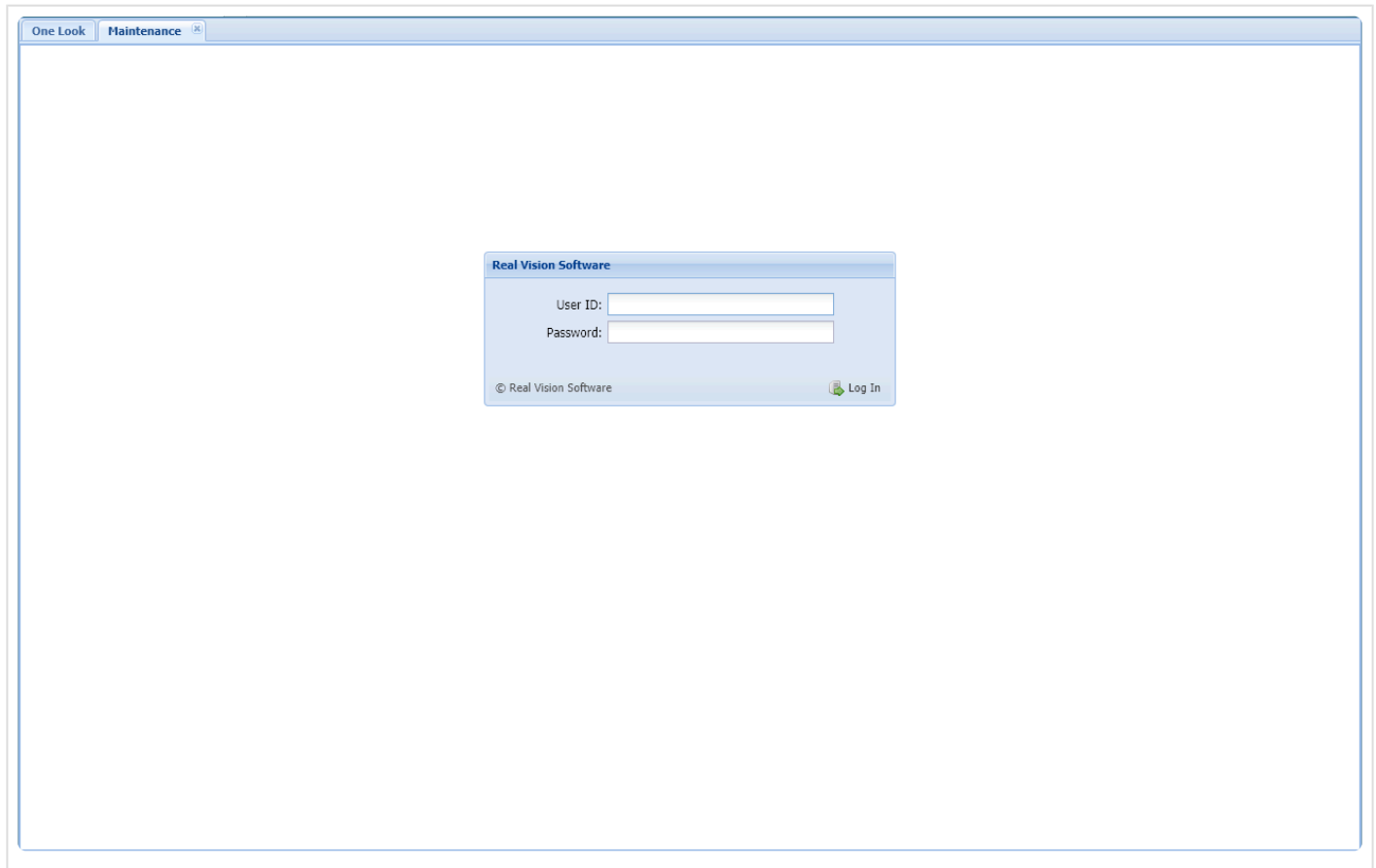
One Look maintenance menu allows maintenance for System Codes, Security, Document Tabs, Email, Scanning, Work Baskets.

Menu Maintenance   «

🔴 Sign Off

SYSTEM MAINTENANCE

MAINTAIN SYSTEM CONTROL FILE PARAMETERS

MAINTAIN IMAGE SYSTEM DESCRIPTIONS AND KEY FIELDS

SECURITY MAINTENANCE

MAINTAIN OPTION SECURITY BY USER

INDEX LEVEL SECURITY

MAINTAIN USER SECURITY

DOCUMENT TABS MAINTENANCE

MAINTAIN DOCUMENT TYPES

MAINTAIN DOCUMENT TAB PROFILES

MAINTAIN DOCUMENT TAB GROUPS

EMAIL MAINTENANCE

MAINTAIN EMAIL ADDRESS BOOK

SCANNING MAINTENANCE

MAINTAIN SCANNING PROFILES

WORK BASKET MAINTENANCE

MAINTAIN ROUTING PROFILES

MENU SECURITY MAINTENANCE

MAINTAIN MENUS

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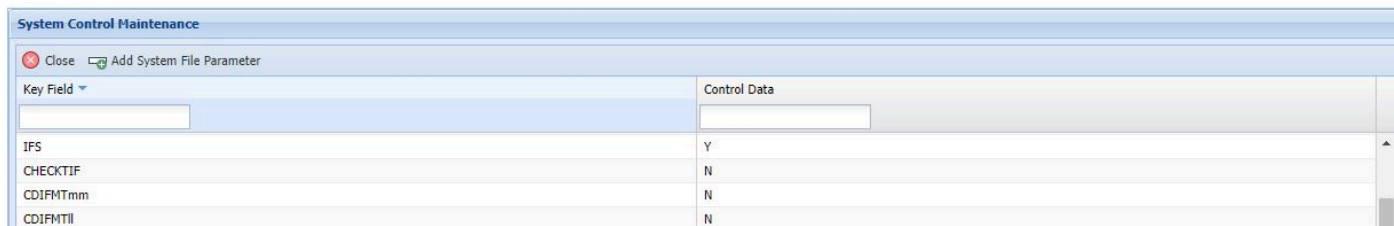
In this section of Maintenance, the RVI Systems and their associated indexes will be created and maintained. There is also the option to setup RVI System control file parameters for common functions and defaults.

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.

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 HERE.

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.

```
Maintain System Control File Screen          (c)Copyright RVI 1992, 1999
  Enter An X To Select The Desired Description           SYS005FM/CATLSTCT

Position To: _____

X   Control    Description
H   IFS        Y
    IFSOPT     N
_   IM         M:
_   IMAGE      I:\IMAGEL
_   IMAGEBK    N
_   IMAGEFAX   /QDLS/IMAGEL/
_   IMAGEPRT   /QDLS/IMAGEL/
_   IMMSRT     1
_   INDDQ      N
_   INQAUDIT   Y
_   INQFLD*    N
_   INQFLD@    N
_   INQFLDa    N                                                        +
_

Page Up =Previous Page     Option(H) =Help       Page Down =Next Page
F3 =Exit                        F12 =Cancel           Enter =Continue
```

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 @.

System: The single character value representing the system. This wiill 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.

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.
B	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* System Control File Parameter *(**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.

6.2.2. Security Maintenance

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.

Add User Option Security:

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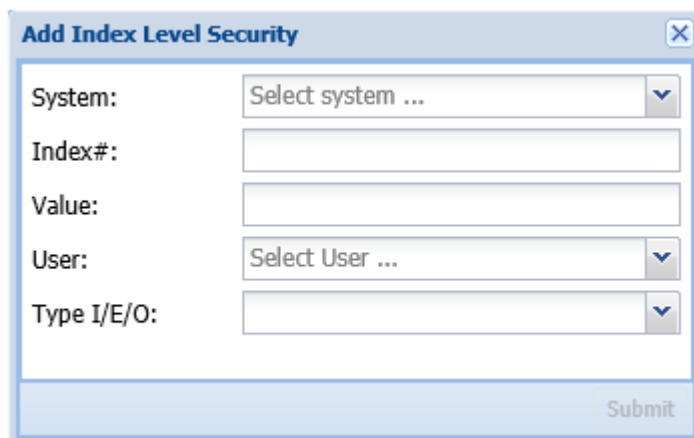
Grant access to reports/documents based on individual index values.

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.

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.

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

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:

⌐ₐ Identify the different documents and assign them a Document Type and Description.

⌐ₐ Establish Document Tabs for grouping of related documents.

⌐ₐ 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: 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: 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: 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

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 ✕

| User Name: | User Name |
| Email Address: | Email Address |

⊘ Submit

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 Maintenance

⊗ Close   🗐 Add Scan Profile   **To edit an existing entry, double-click the record.**

Scan Profile	Description	Type	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	O ~ AF ACCOUNTS PAYABLE D...
AP DOCS	ACCOUNTS PAYABLE INVOICES	BARCODE	A ~ AP WORKFLOW SYSTEM
AP-SEPERAT	ACCUFUND AP BARCODE SEPE...	BARCODE	O ~ 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   ⊘ Submit

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:

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 HERE 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

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.
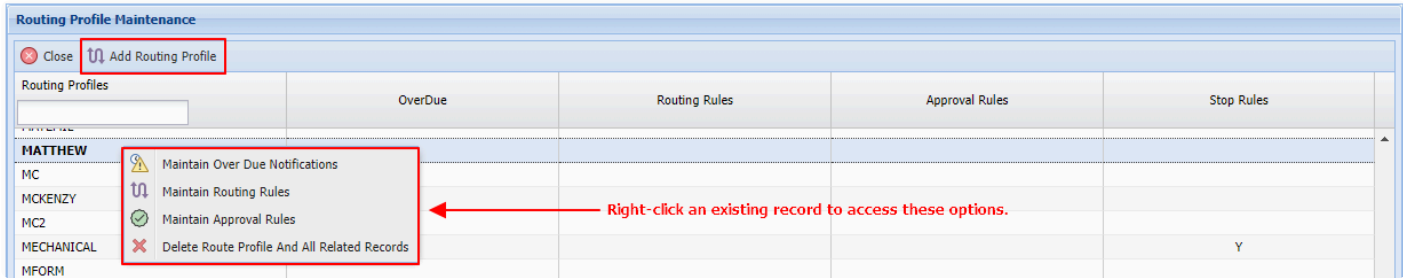
Click **Add Routing Profile** to setup a new routing profile.

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:	Permits the user to establish the desired viewing and processing order. Delivery Sequence can be set up several different ways: 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 user number 3 can have access to the image to begin their work.

	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. 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.
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								
⊘ Close ⊞ Add Double-click an existing record to perform maintenance.								
Route	Route Member	System/Doc Type	Overdue After A Period Of	Frequency	Supervisor	Notify Supervisor	Notify Member	Route To Profile
CF-PO	MONTY	*ALL	002	D	LEN	Y	N	

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.

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.

Options Processing

Approval Rules Maintenance

Close	Submit

Route Name: CF-APLOW

Document Type:

Approval

Action To Take:	APAPPROV
Auto Delete:	Y
Change PTY:	
Force Notes:	N
Copy/Move:	M

Disapproval

Action To Take:	APPROBLEM
Auto Delete:	Y
Change PTY:	
Force Notes:	N
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:	The user can select from the following available options: 1. A routing profile to automatically route to. 2. A routing rule profile to automatically route to. 3. *PROMPT = Prompt for action to take when approved. 4. *NONE = Take no special action.
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:	The user can select from the following available options: 1. A routing profile to automatically route to. 2. A routing rule profile to automatically route to. 3. *PROMPT = Prompt for action to take when disapproved. 4. *NONE = Take no special action.
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

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**.
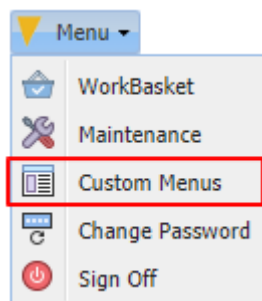
When **Custom Menus** is selected, the *Customer Specific Programs* window opens with a list of available programs based on user level security. (See [Setup Custom Menus](#) for details.)
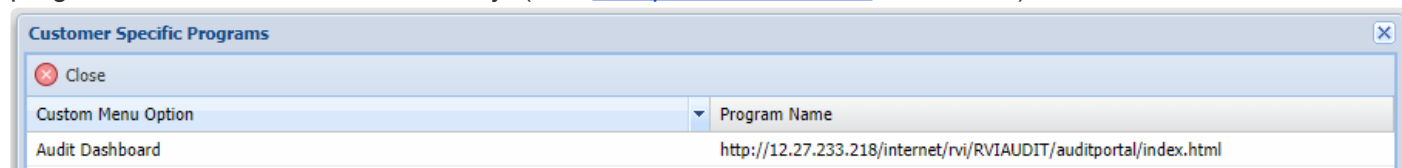
This example shows the custom menu option **Audit Dashboard** which calls the RVI Personal Dashboard program.
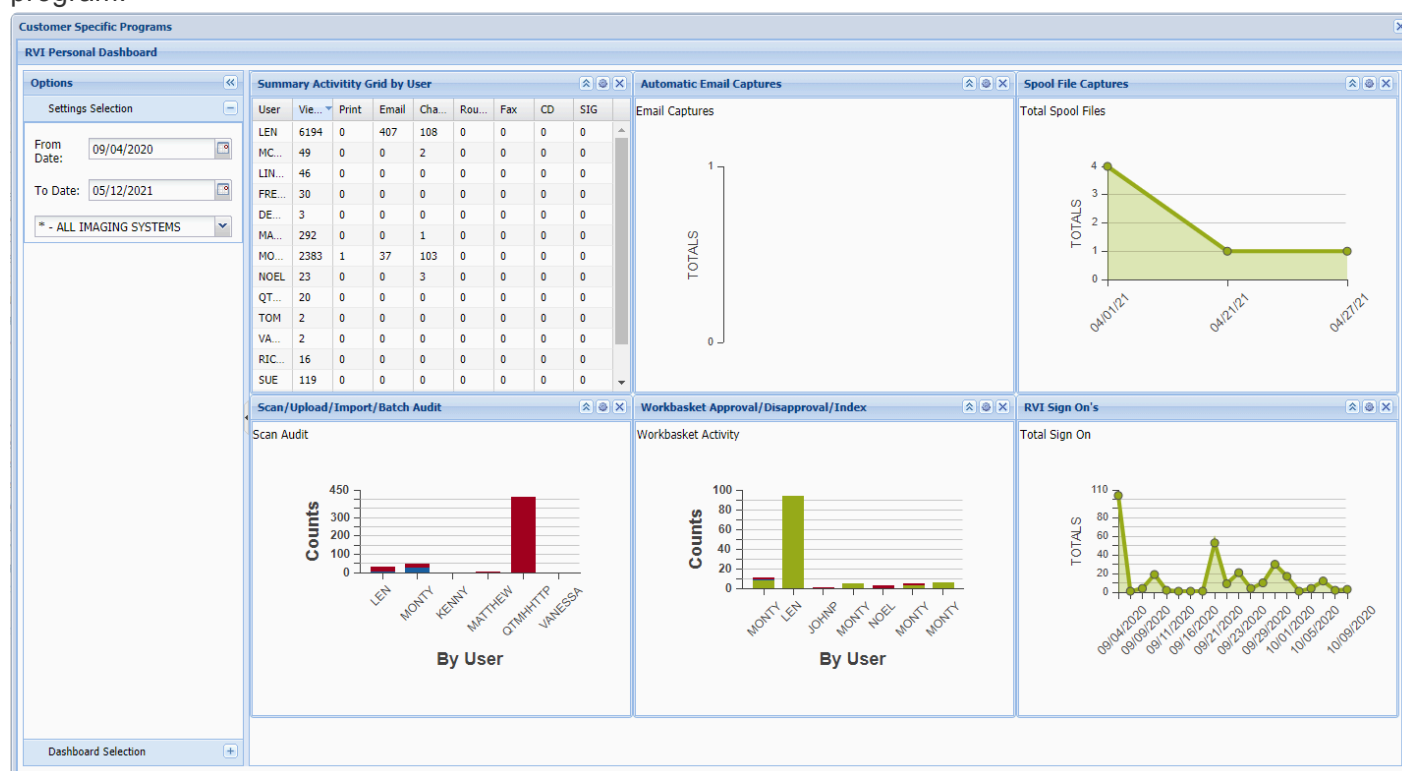
The dashboard can be personalized using the *Dashboard Selection* menu to include only those windows you want to monitor.
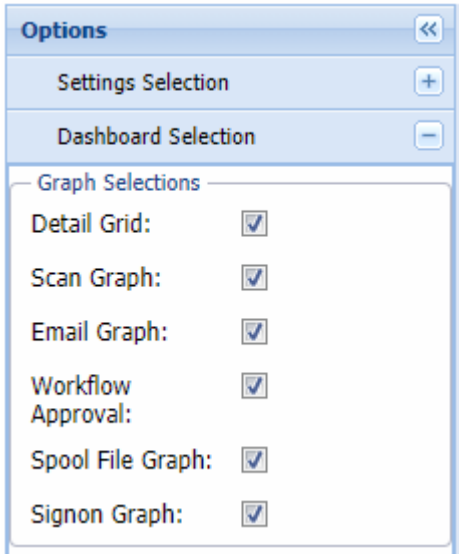
6.3.1. Setup Custom Menus

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.*)
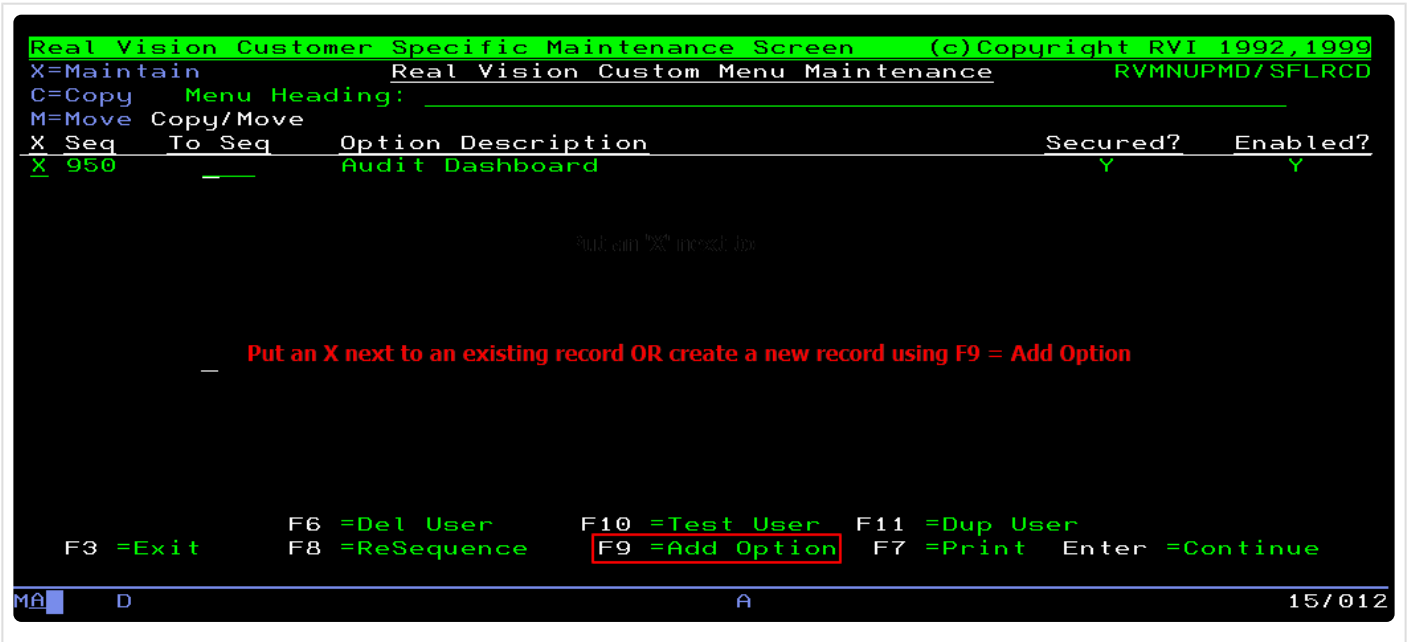
```
Real Vision Customer Specific Maintenance Screen          (c)Copyright RVI,1999
                                UPDATE                         RVMNUPMD/RECUPD

Option #: 950    Menu Option Text: Audit Dashboard ......................
                                                      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):
CALL LINK parm('http://12.27.233.218/internet/rvi/RVIAUDIT/auditportal/index.htm
l')
......................................................................
......................




  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.

```
Real Vision Customer Specif                                            ,1999
                              Custom Menu Security Copyright RVI, 1999  ECUPD
                                                RVMNUUFD/TSUBCTL
Option #: 950    Menu Option    Seq#:    950
                                Desc:    Audit Dashboard              sts.
Option Enabled?: Y   (Y/N)
Setting Enabled To N Will Re         Users:
Press F5 If Security By User    Pos To: ............       ity.
                                        MCKENZY____    To add a customer specific menu
Command To Execute (F4 To Pr            QTMHHTTP___    option in One Look:          e):
CALL LINK parm('http://12.27            _____                             ex.htm
l')                                     _____     1. Add user QTMHHTTP
......................                   _____
......................                   _____     2. Add the user id(s) that will
                                        _____     have access to this menu option
                                        _____
                                        F3 =Exit

  F3 =Exit         F5 =Maintain User Security      F23 =Delete    Enter =Continue
```

The setup is complete!

Users specified in Step 6 will see the option when they select *Menu / Custom Menus* from One Look.
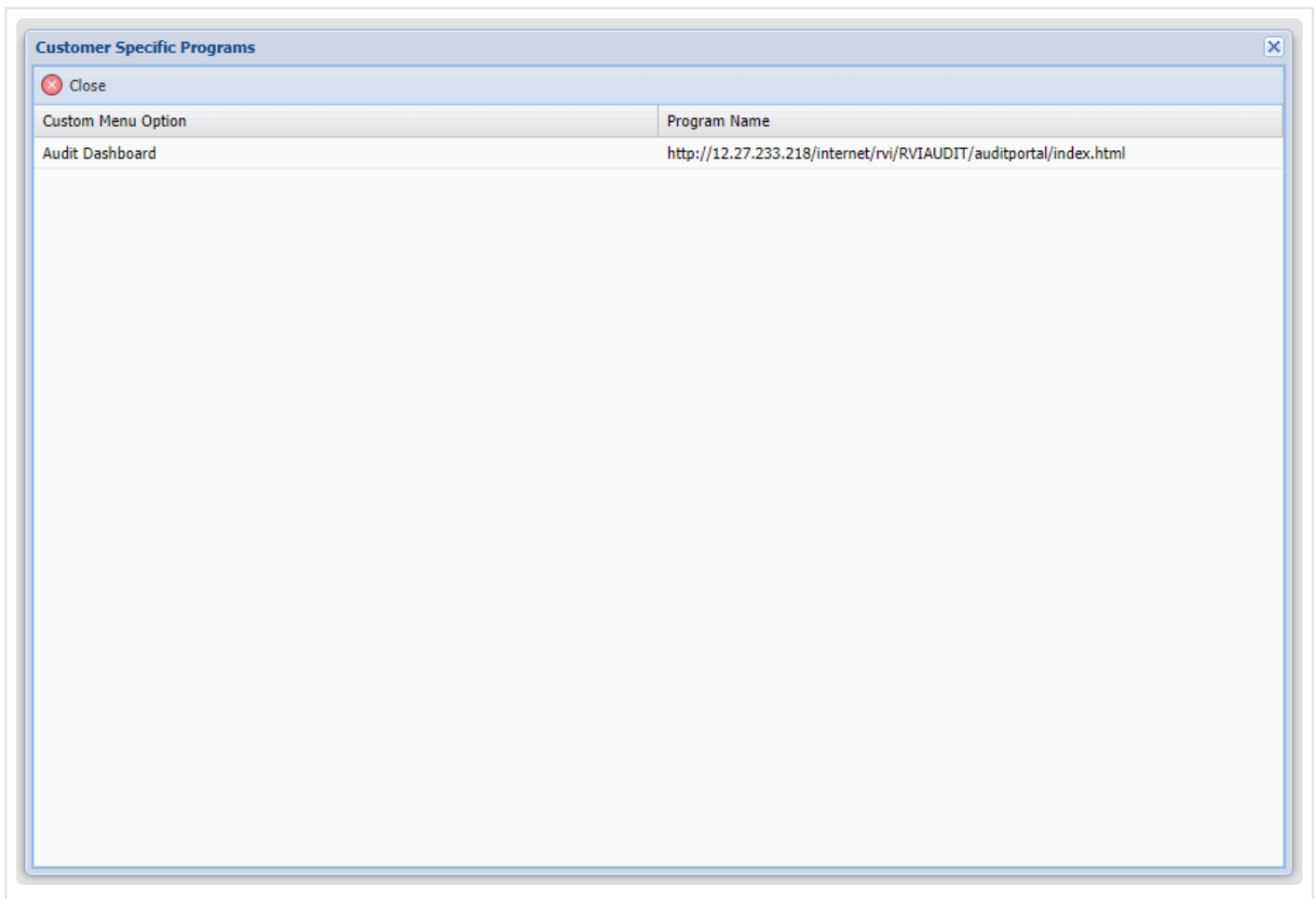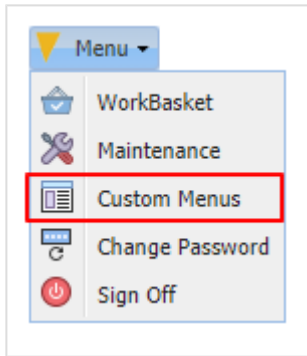
Double-click the line item to execute the menu.

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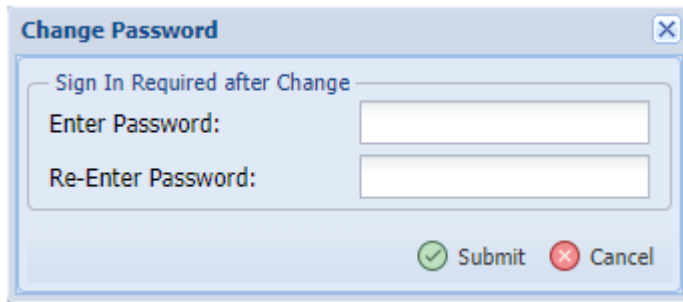
6.4. Change Password

1. Select Menu, Change Password.
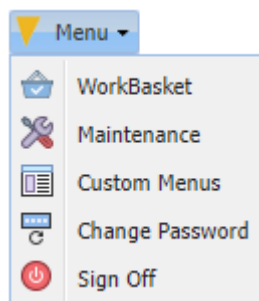
2. Enter a valid password.

(**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.

▼ Menu ▾

📥 WorkBasket

🛠 Maintenance

🗒 Custom Menus

⌨ Change Password

⏻ Sign Off
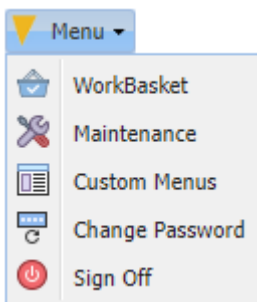
7. IMAGE INQUIRY TOOLBOX

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
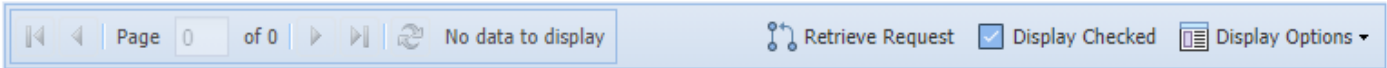
Display & Left Side Functions

Subfile List & Right Click Menu

Show Notes	
Add Notes	
Email Image	
Index Details	
Index Maintenance	
Show Routing	
Route Document ▸	
Linking ▸	
Load Indexes	
Audit Information	
Add to Temporary	
Maintain Staple	
Add to Staple Grid	
Show In Window	
Download	
Delete Item	
Z-Options	
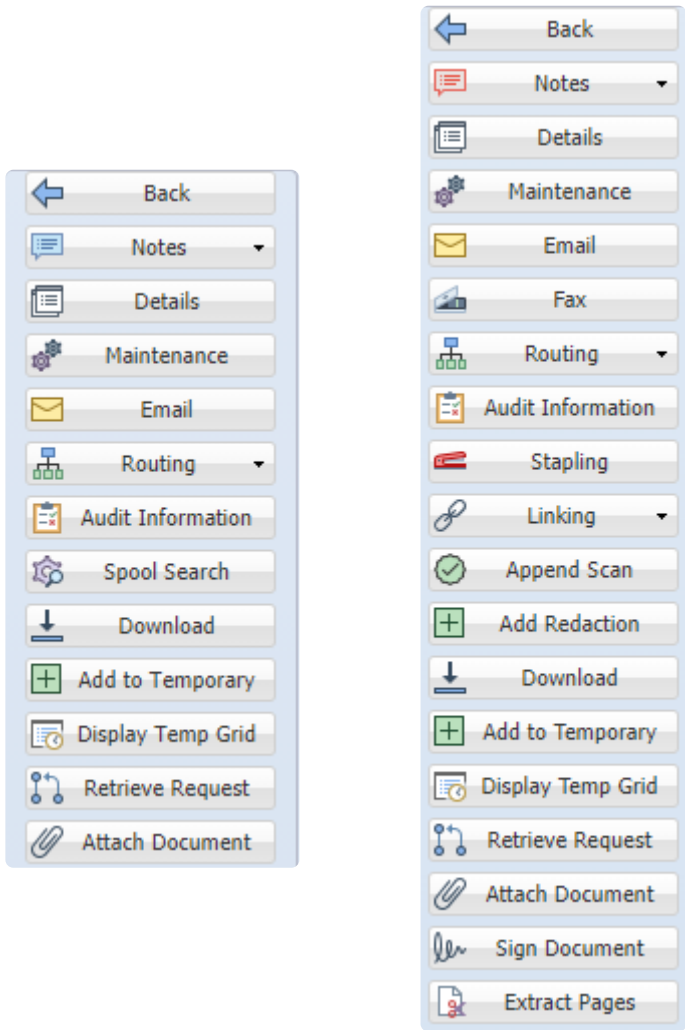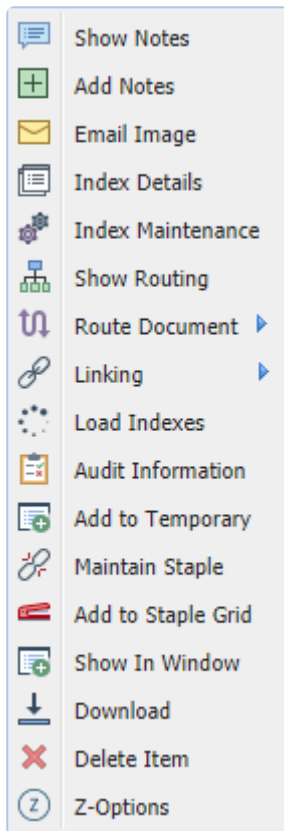
7.1. Help & Settings

To watch a video on this topic CLICK HERE

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

Settings: Sets session preferences including grid views and date/numeric formatting.
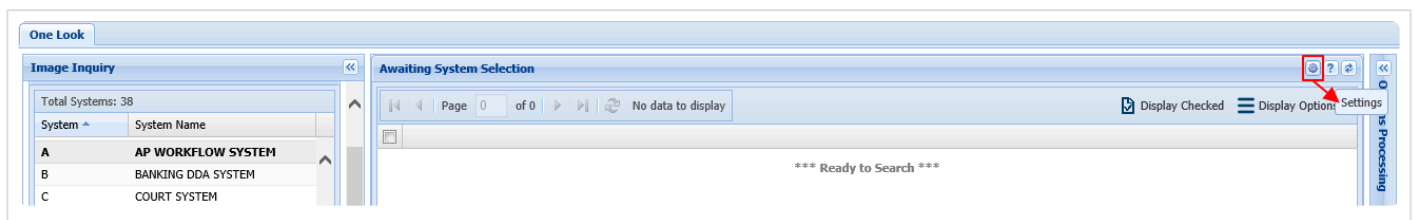
To access the session settings:

1. After login, select the icon in the top right corner of the One Look window.
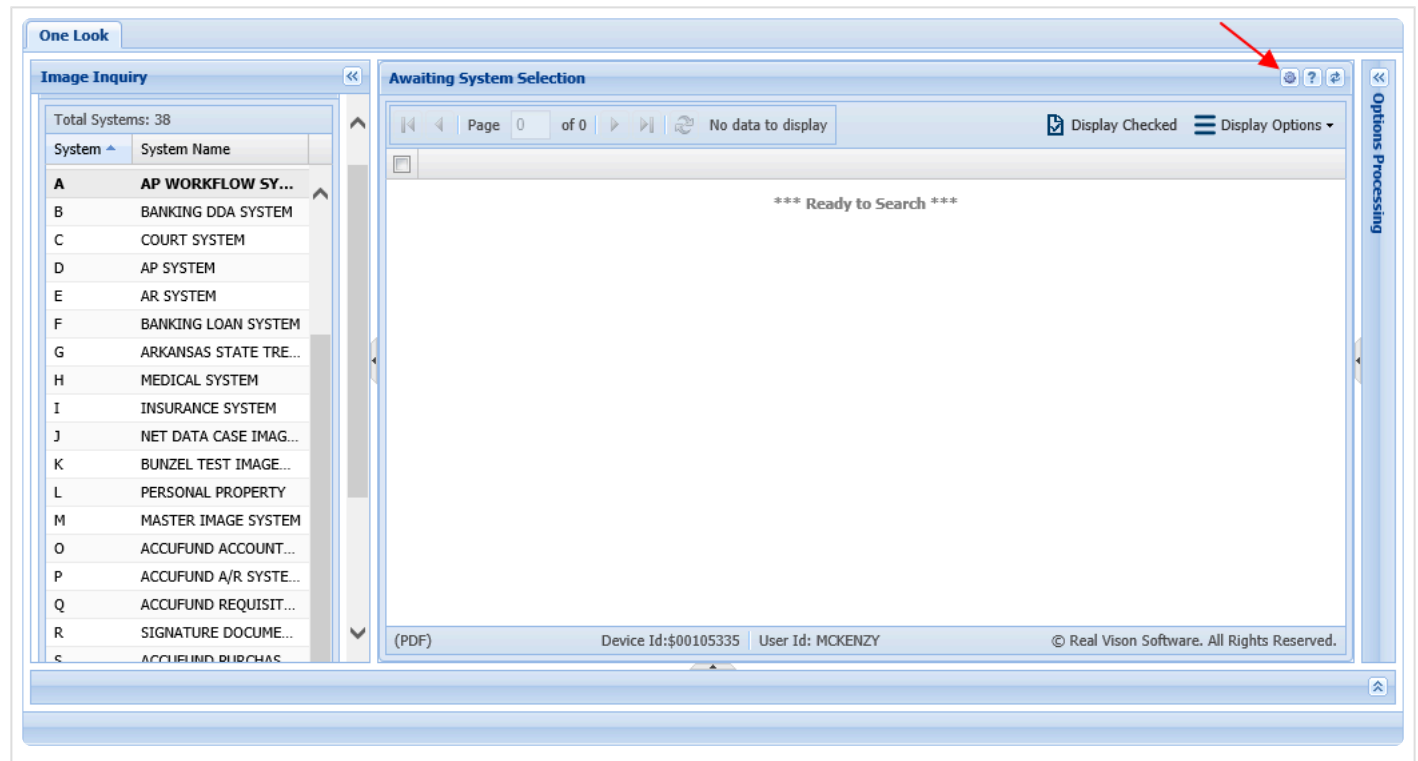
2. The session settings window will display.
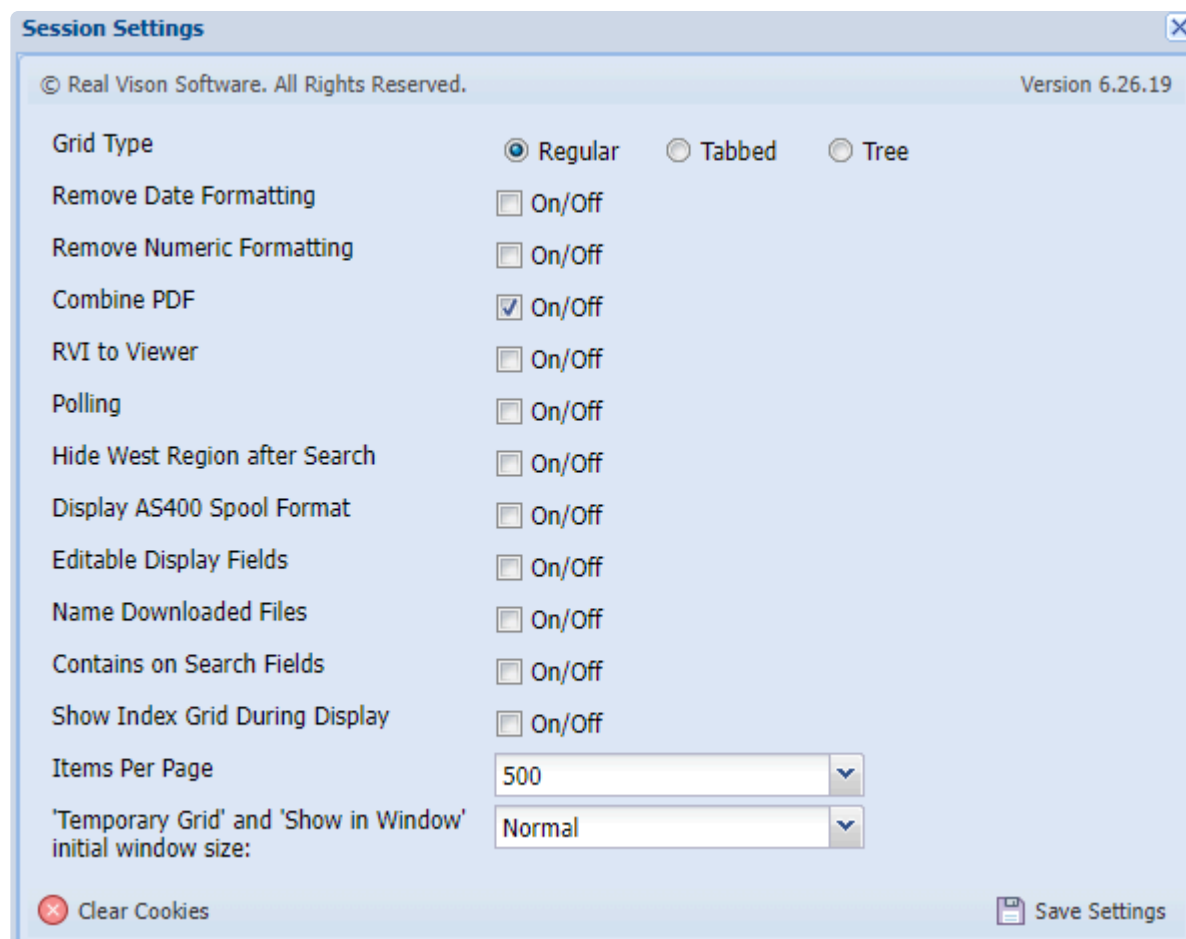
Available Options:

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

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

   - *Tabbed*
   Displays the index list based on document tabs.

   - *Tree*
   Displays the index list in an expandable tree format starting with index 1.
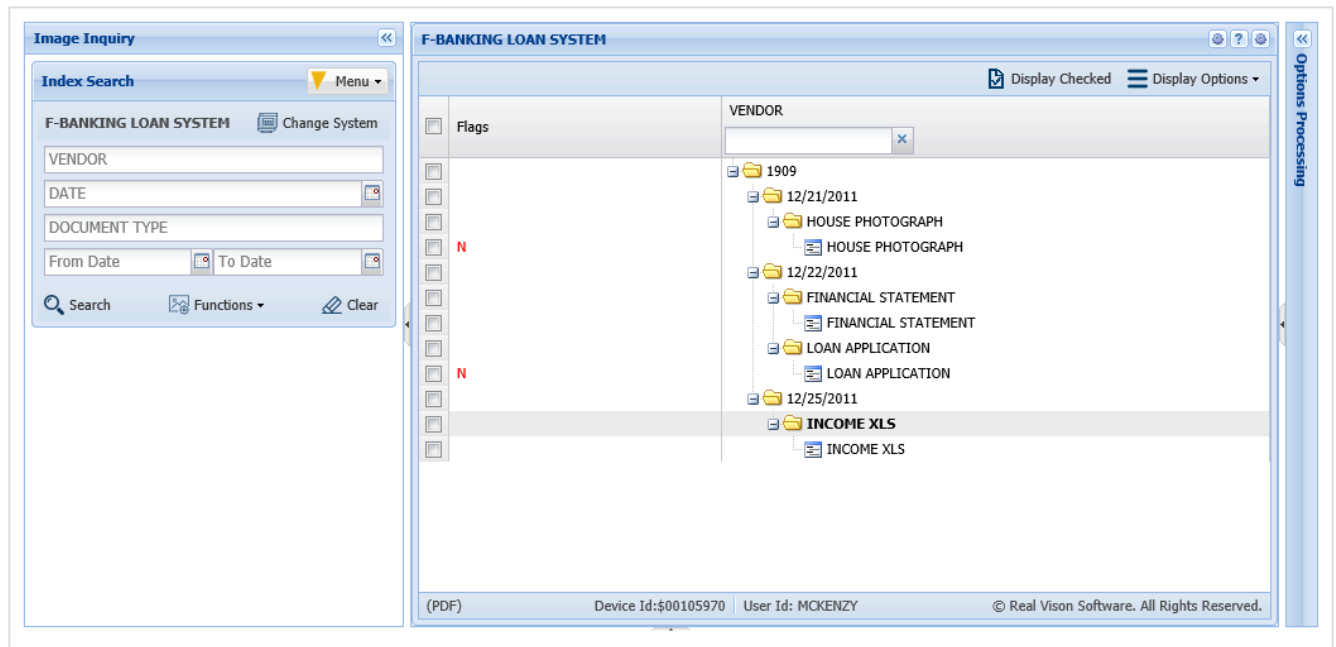
2. **Remove Date Formatting**
   Removes the requirement for users to enter a specific date format during image inquiry, scanning,and indexing.

3. **Remove Numeric Formatting**
   Removes the requirement for numeric data in numeric only fields during image inquiry, scanning,and indexing.

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

5. **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 Type O or P 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.

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.

| |◀ ◀ | Page 1 of 2 ▶ ▶| ⟳ Displaying Document 1 - 1 of 2 | |◀ ◀ | Page 1 of 9 ▶ ▶| ⟳ Displaying Page 1 - 1 of 9 |
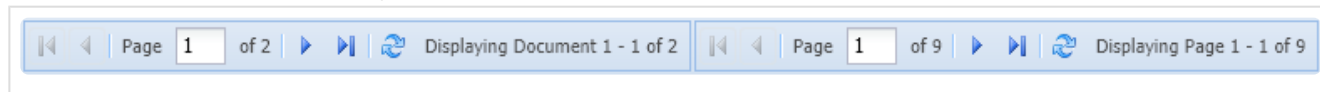
10. **Editable Display Fields**

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 [Functions ▾] .

```
 Demo Insurance Application System              (c) Copyright  RVI 1992
 Policy: 1          John Smith               Sx M Dob 12/31/68
  Vital Information          Claims Filed:  Y     Modal Premiums
 Application Date    4/30/11 | Day S F Mode    M   231.33  Q  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
 Special Billing          12 |




                 Using Type F     F15 = Chg To Type S
 F3 =Exit F5 =Inquiry    F9 =Scan   F10 =Upload  F11 =Display Policy F12 =Previous

 MA   D                                                              01/001
```

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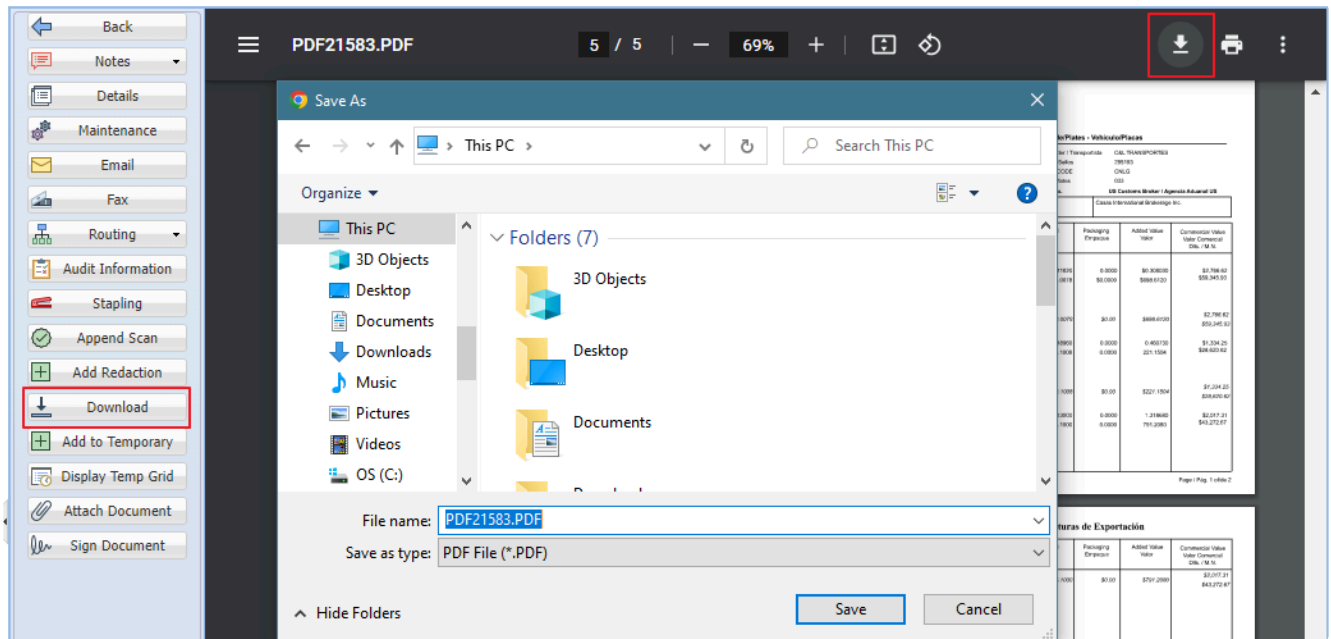
Alternate *Save As* dialog that will display is the **Download** button is used rather than the download arrow.

Save As

Would you like to change this file name?

| |

OK   Cancel
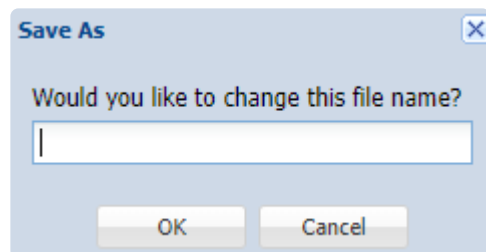
12. **Contains on Search Fields**

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.

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.
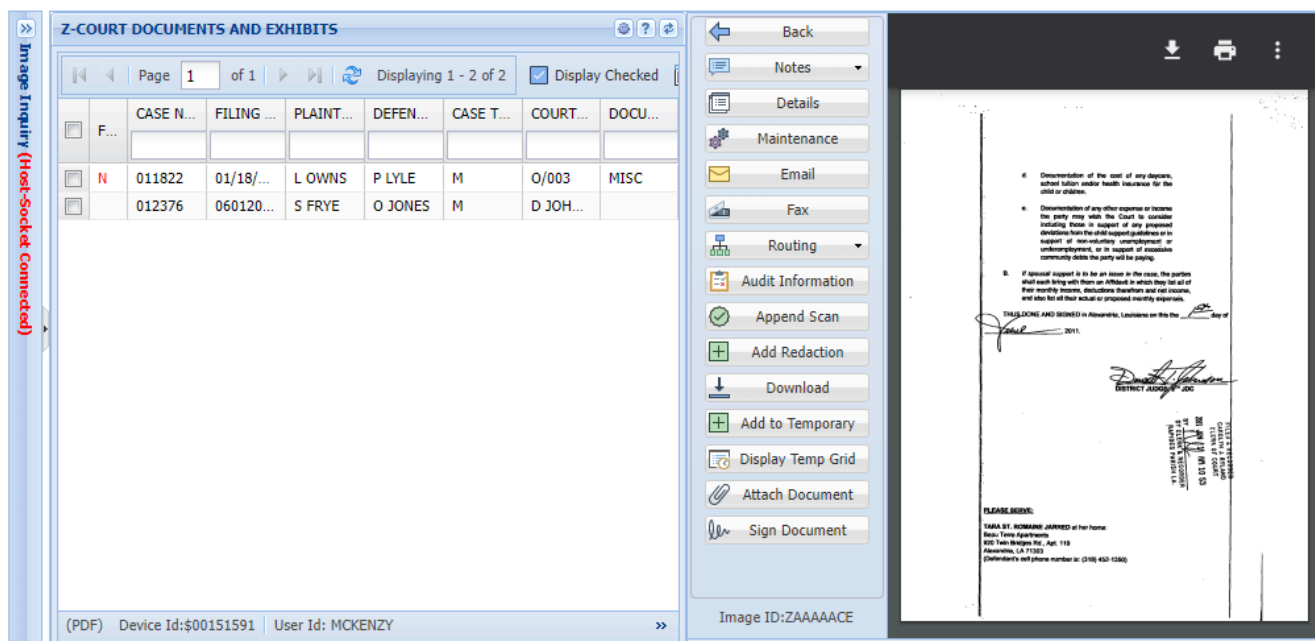
14. **Items Per Page**

    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 temporary grid or show in window. The default is 'Normal' with 'Maximized' and 'Height 100%, Width 50%' as options.

RVI User Guide: Displays the current One Look manual allowing customers to search on help topics and send comments to RVI customer service.
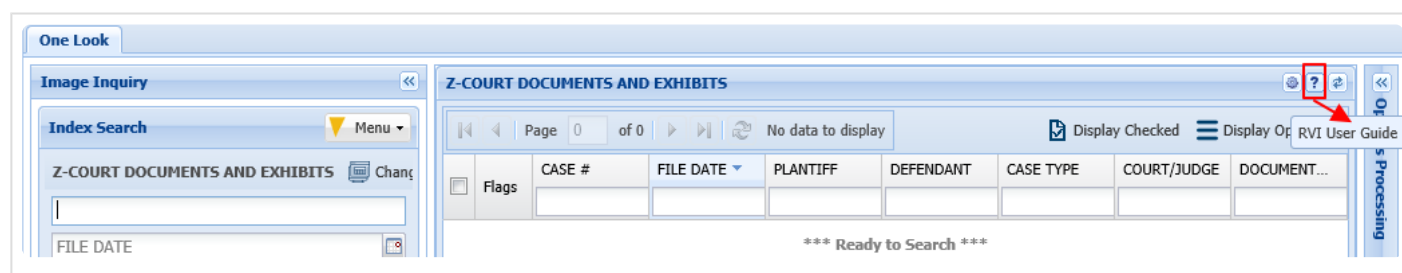
Viewer/PDF: Switches the PDF image display from the browser to the RVI PC viewer.
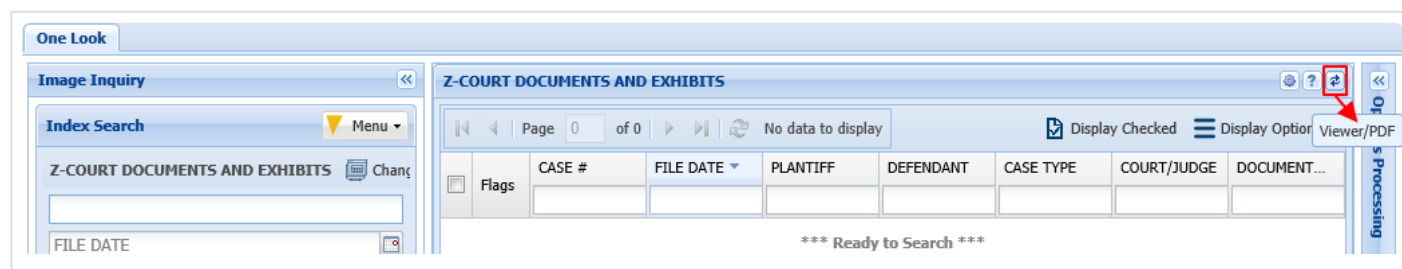
7.2. Navigation & Appearance

To watch a video on this topic CLICK HERE

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

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

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

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

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

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

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

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

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

Image ID:ZAAAADKQ

Page 1 of 2   Displaying 1 - 1 of 2

Display Options

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

Z-COURT DOCUMENTS AND EXHIBITS

	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU...	DOCUMEN...	TYPE
	N R	241780	03/15/2017	J JARRED	T JARRED	C	MONTOGUE	FIRST SUP...	IMAGE
	N ...	241780	03/15/2017	J J		C	MONTOGUE	GARNISHM...	IMAGE
	N L	241780	04/22/2017	J J		C	MONTOGUE	PETITION	IMAGE
		241780	01/18/2018	J J		C	J DOWNS	WORD	OEM

Context menu:
- Show Notes
- Add Notes
- Email Image
- Index Details
- Index Maintenance
- Show Routing
- Route Document
- Load Indexes
- Audit Information
- **Add to Temporary**
- Add to Staple Grid
- Show In Window
- Download

To add a document into the Temporary Grid:

1. Right-click a record.

2. Select 'Add to Temporary'.

(PDF)   Device Id:$00119236   User Id: MCKENZY   © Real Vison Software. All Rights Reserved.

Image Inquiry

Index Search   Menu ▾

Z-COURT DOCUMENTS AND EXHIBITS   Change System

241780
FILE DATE
PLANTIFF
DEFENDANT
CASE TYPE
COURT/JUDGE
DOCUMENT TYPE
From Date   To Date

Search   Functions ▾   Clear

Z-COURT DOCUMENTS AND EXHIBITS

Page 1 of 1   Displaying 1 - 4 of 4   Retrieve Request   Display Checked   Display Options ▾

	Flags	CASE #	FILE DATE	PLANTIFF	DEFENDANT	CASE TYPE	COURT/JU...	DOCU...
	N R	241780	03/15/2017	J JARRED	T JARRED	C	MONTOGUE	FIRST S
	N ...	241780	03/15/2017	J JARRED	T JARRED	C	MONTOGUE	GARNIS
	N L	241780	04/22/2017	J JARRED	T JARRED	C	MONTOGUE	PETITIO
		241780	01/18/2018	J JARRED	T JARRED	C	J DOWNS	WORD

Display Options menu:
- Display Temporary Grid
- Display Staple Grid
- Show Row Numbers
- Grid To Excel
- User Activity Chart

To display the Temporary Grid:

1. Click 'Display Options'.

2. Select 'Display Temporary Grid'.

(PDF)   Device Id:$00119236   User Id: MCKENZY   © Real Vison Software. All Rights Reserved.

Temporary Grid

⊗ Close   Clear Temporary Grid   👁 View Selected   ☐ Combine

		(PERSONAL PROPERTY)	(DESCRIPTION)	(PIN:)	(OWNER:)	(TAG:)	(STATUS:)	(NOT USED)	(NOT USED)
	L	PHOTOGRAPH		310069	SMITH RONALD	124 SARCOXIE TOWN...	01/08/2015		
		(COURT DOCUMENTS...	(DOCUMENT TYPE)	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
	Z	PETITION		241780	04/22/2017	J JARRED	T JARRED	C	MONTOGUE
	Z	GARNISHMENT		241780	03/15/2017	J JARRED	T JARRED	C	MONTOGUE

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

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

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

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

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

User Audit Tab:
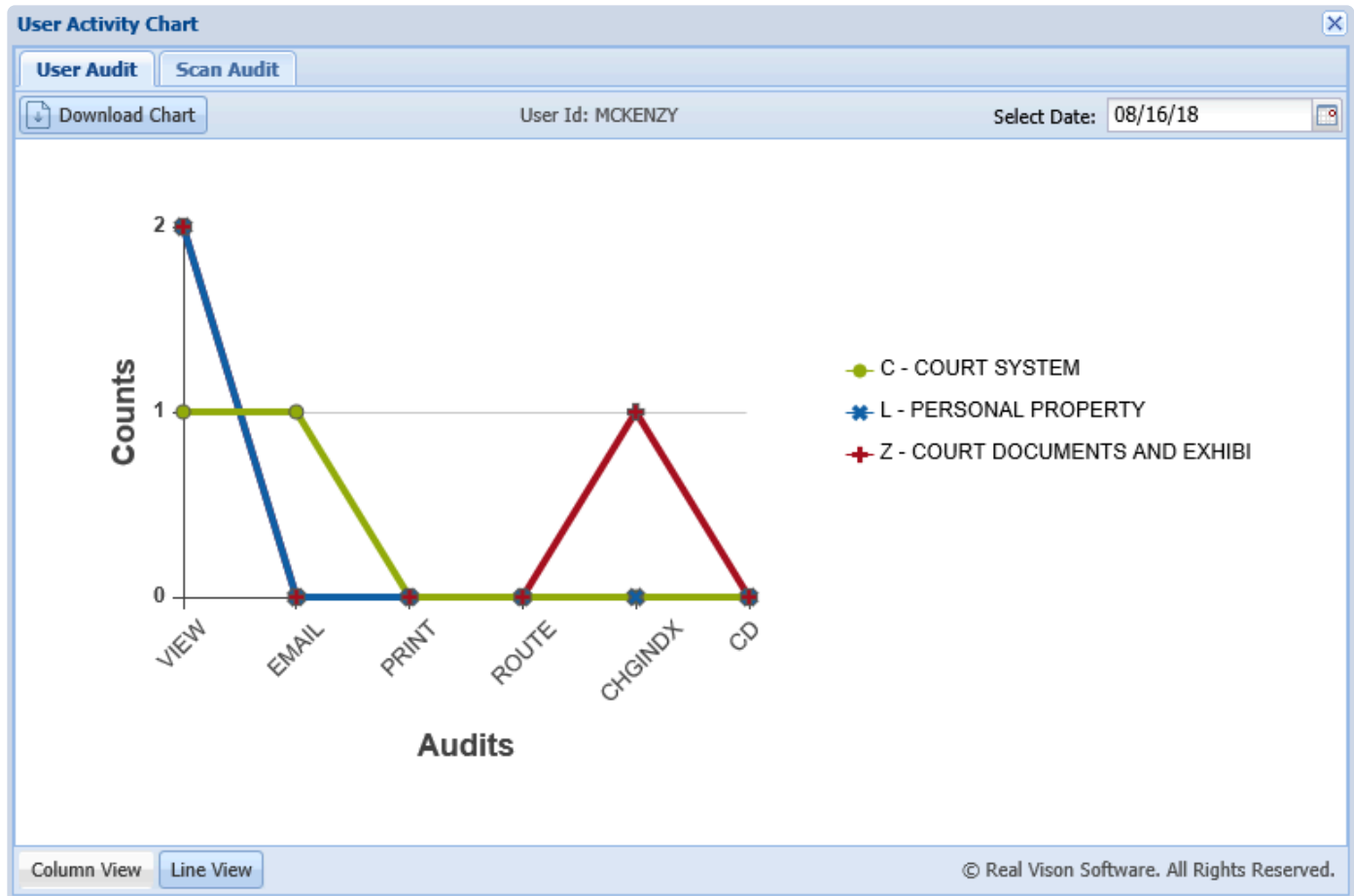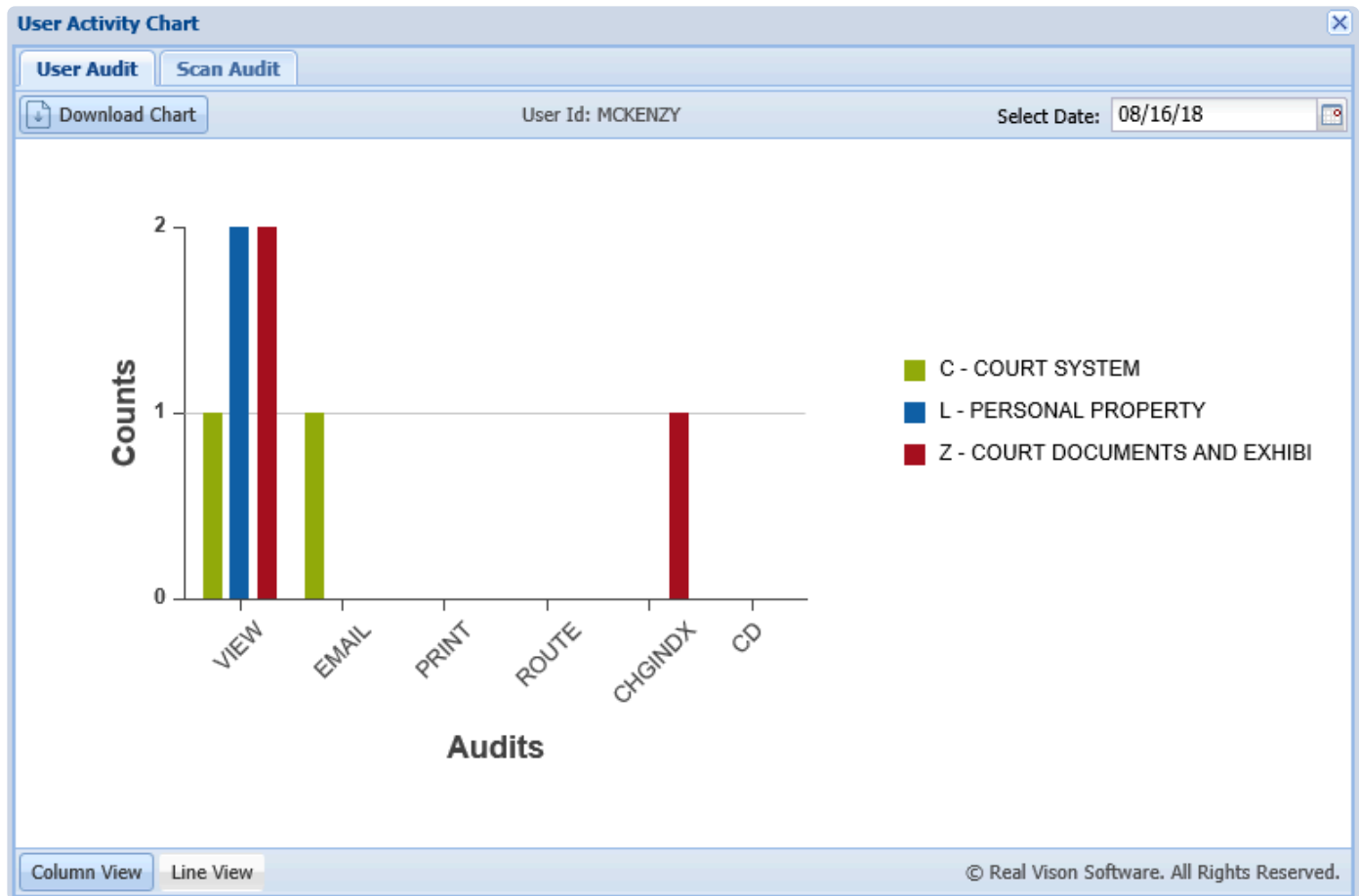
Scan Audit Tab:

Line View
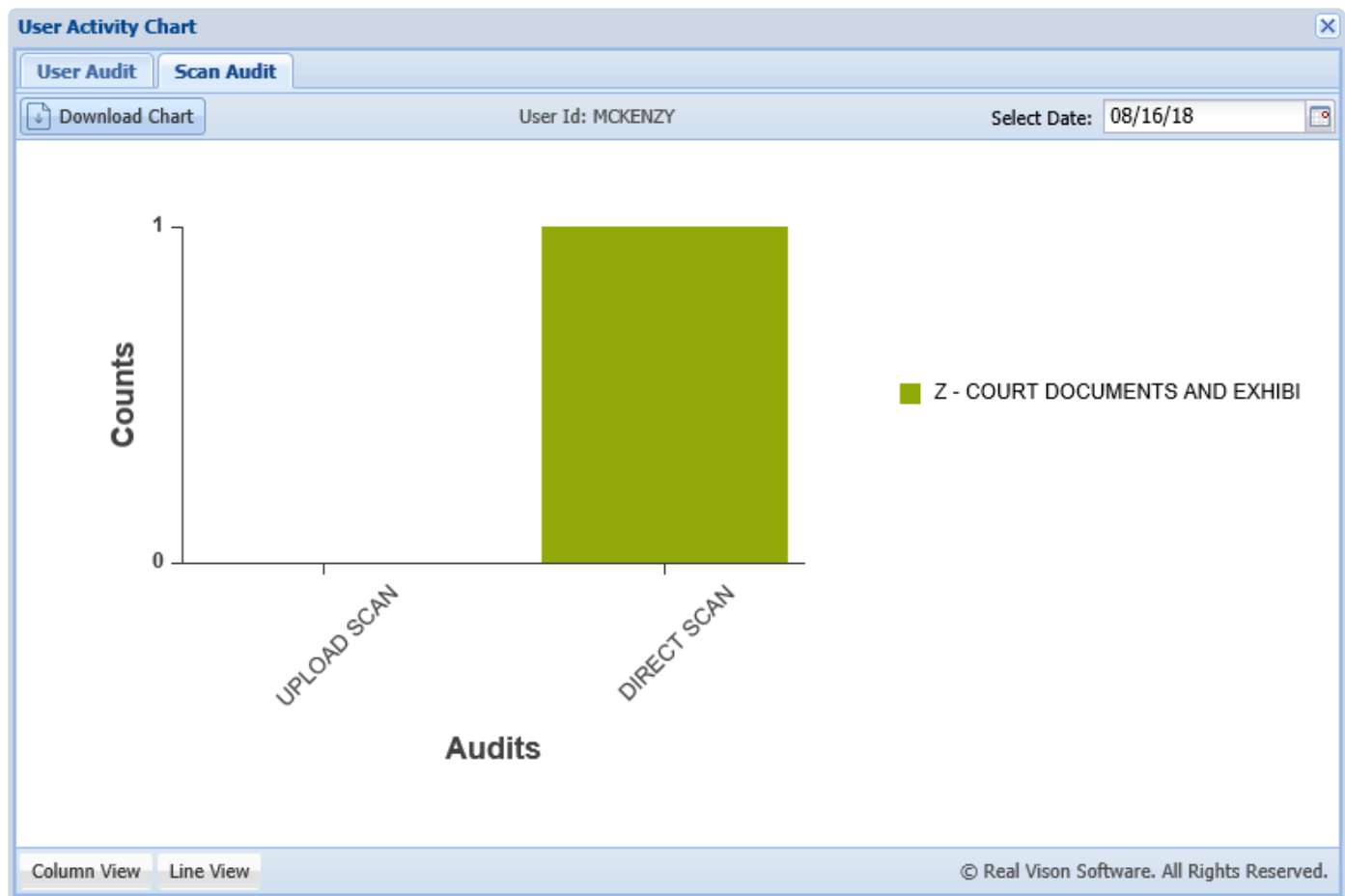
Column View

7.3. Display Options Ribbon

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

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

Back

Notes

Details

Maintenance

Email

Routing

Audit Information

Spool Search

Download

Add to Temporary

Display Temp Grid

Retrieve Request

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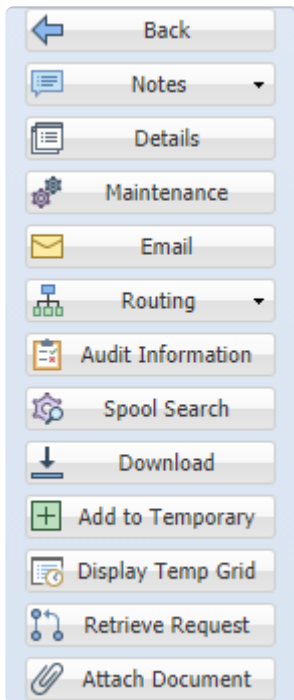
The Spool Search button is only available when displaying spool files.

Back

Notes

Details

Maintenance

Email

Fax

Routing

Audit Information

Stapling

Linking

Append Scan

Add Redaction

Download

Add to Temporary

Display Temp Grid

Retrieve Request

Attach Document

Sign Document

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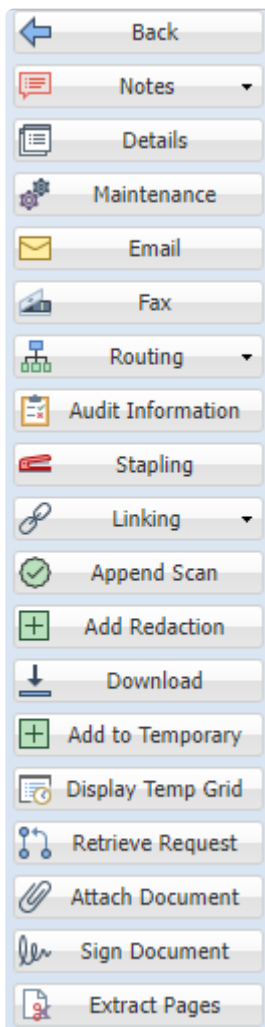
The Append Scan button is only available when displaying scanned images.

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

Back: Returns to the search results of the last image inquiry. You can change your search or choose to

view another item from the current list.

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

Image Inquiry «

Index Search ▼ Menu ▾

Z-COURT DOCUMENTS AND EXHIBITS 🗐

241780

FILE DATE 🗓

PLANTIFF

DEFENDANT

CASE TYPE

COURT/JUDGE

DOCUMENT TYPE

From Date 🗓 To Date 🗓

🔍 Search   🖼 Functions ▾   🖉 Clear

↩ Back

📋 Notes ▾

Show Notes

Add Notes

Notes icon will be red instead of blue when notes exist.

✉ Email

🔀 Routing ▾

📑 Audit Information

📄 Append Scan

💾 Download

⊕ Add to Temporary

🗂 Display Temp Grid

Image ID:ZAAAADKS

i.
The allegations of plaintiff's original Petition for Divorce and Other Relief are reiterated and affirmed save and except as may be inconsistent herewith;

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:

1. That this amended pleading be deemed good and sufficient and be ordered filed;

2. That the prayer of the petitioner's original Petition for Divorce and Other Relief is reiterated and reaffirmed, save and except as may be inconsistent herewith;

3. That all allegations of the prayer are pleaded in the alternative were one may be inconsistent with another; and

4. For all necessary orders and decrees.

Options Processing «

Options Processing »

Add Notes

⊘ Submit   🖋 Check Out Document   ⊘ Cancel

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

🖋 Check Out Document
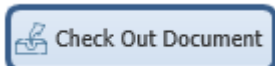
Once the note is complete, select [Check In Document]
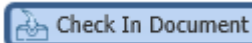
Once a Note is Added:

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

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

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

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

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

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

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

Fax: Fax the document being viewed. Customer must have a fax adapter installed. Contact Real Vision Software 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.*)
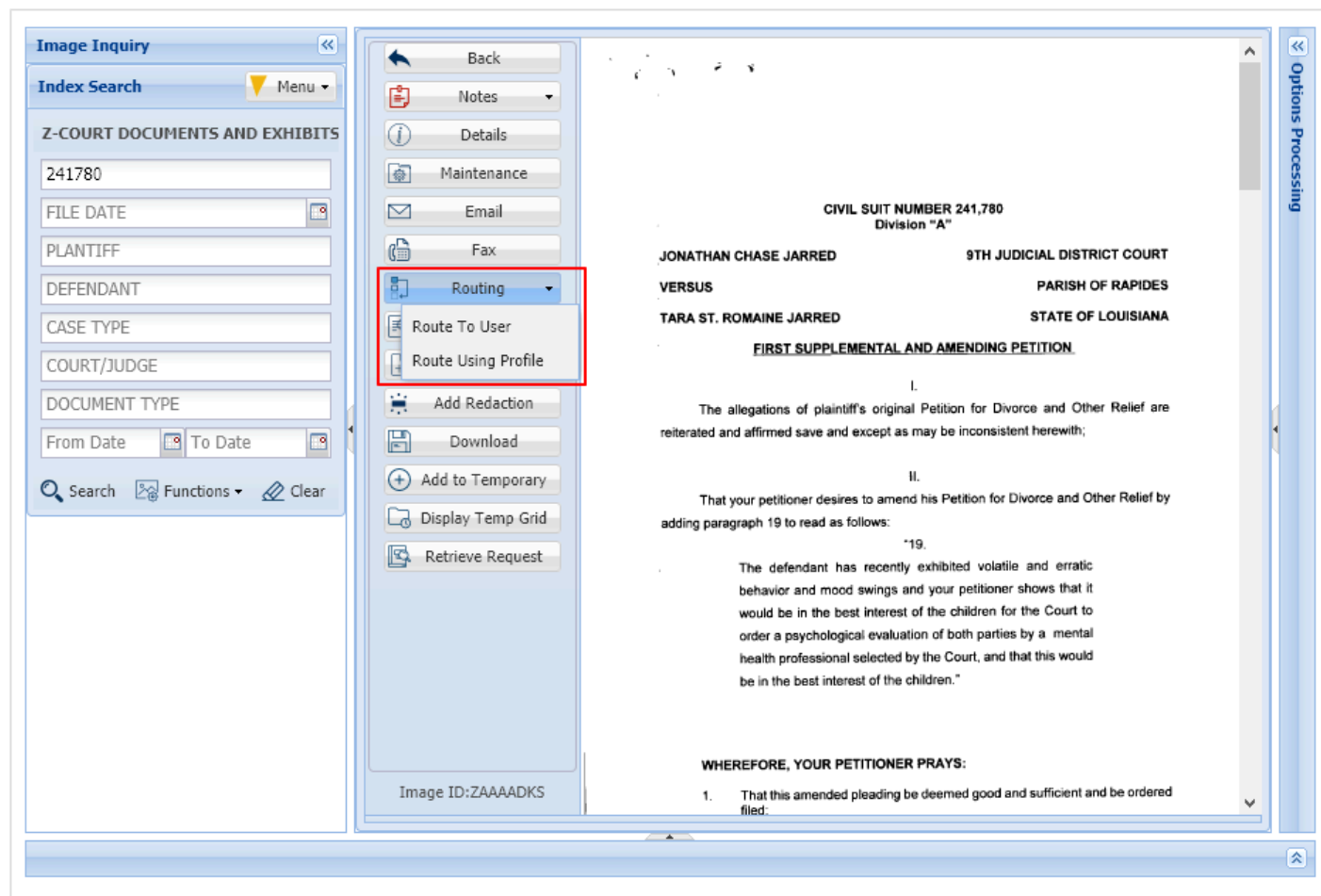
<u>Once a document is Routed:</u>

- The system will display 'R' next to the record.
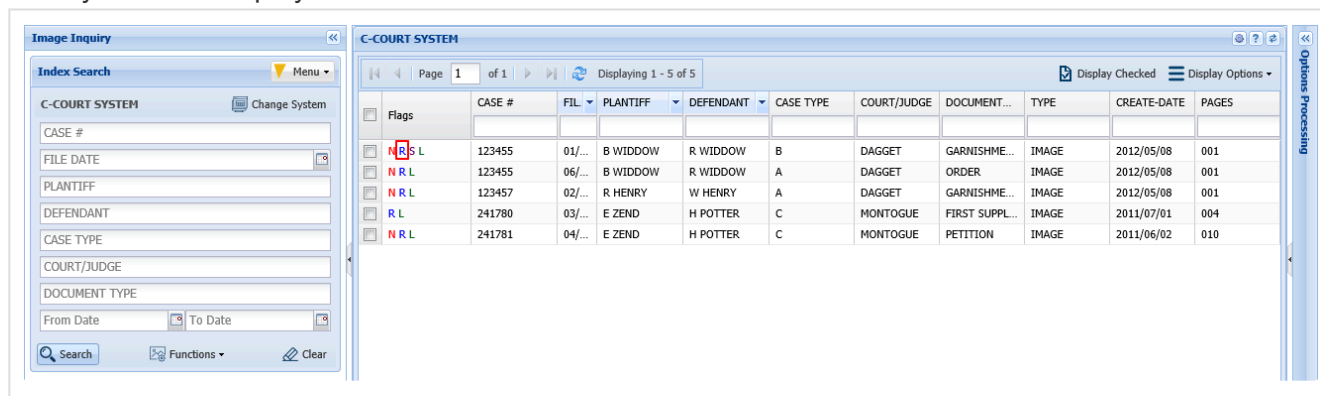
After the document is routed, the option Show Routing will appear under the Routing drop down list.

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

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

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

If the primary document is stapled to another image:

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

- The button will be available.

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

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

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

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

- The system will display L next to the record.

After displaying the image:

- The button will be available.

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

Append Scan: Adds pages to the end of an existing image. The scan process is automatically initiated when the Append button is selected.
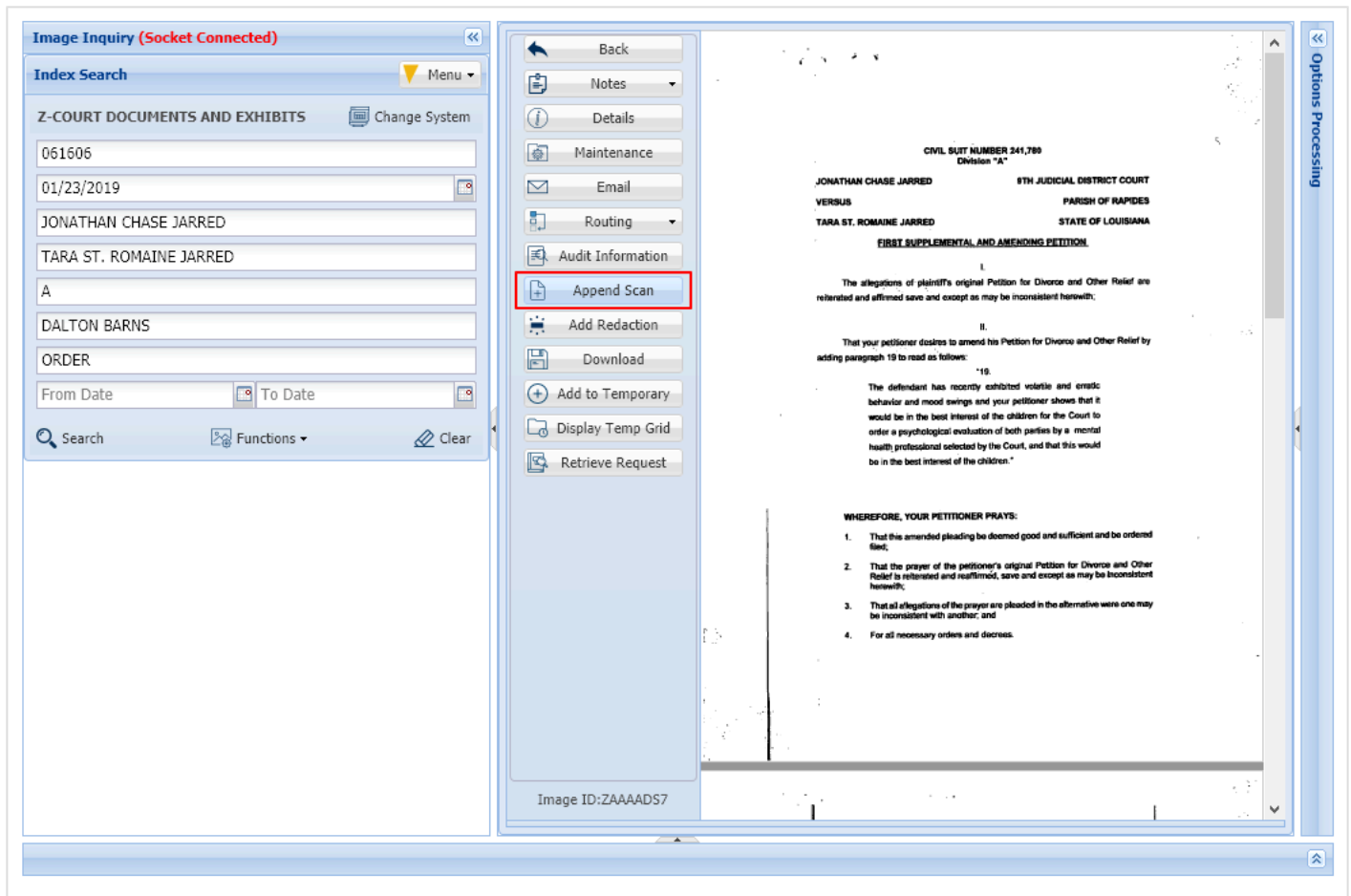
Add Redaction: Redact an area of an image using an opaque highlighter.

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

Display an image then select **Add Redaction**.
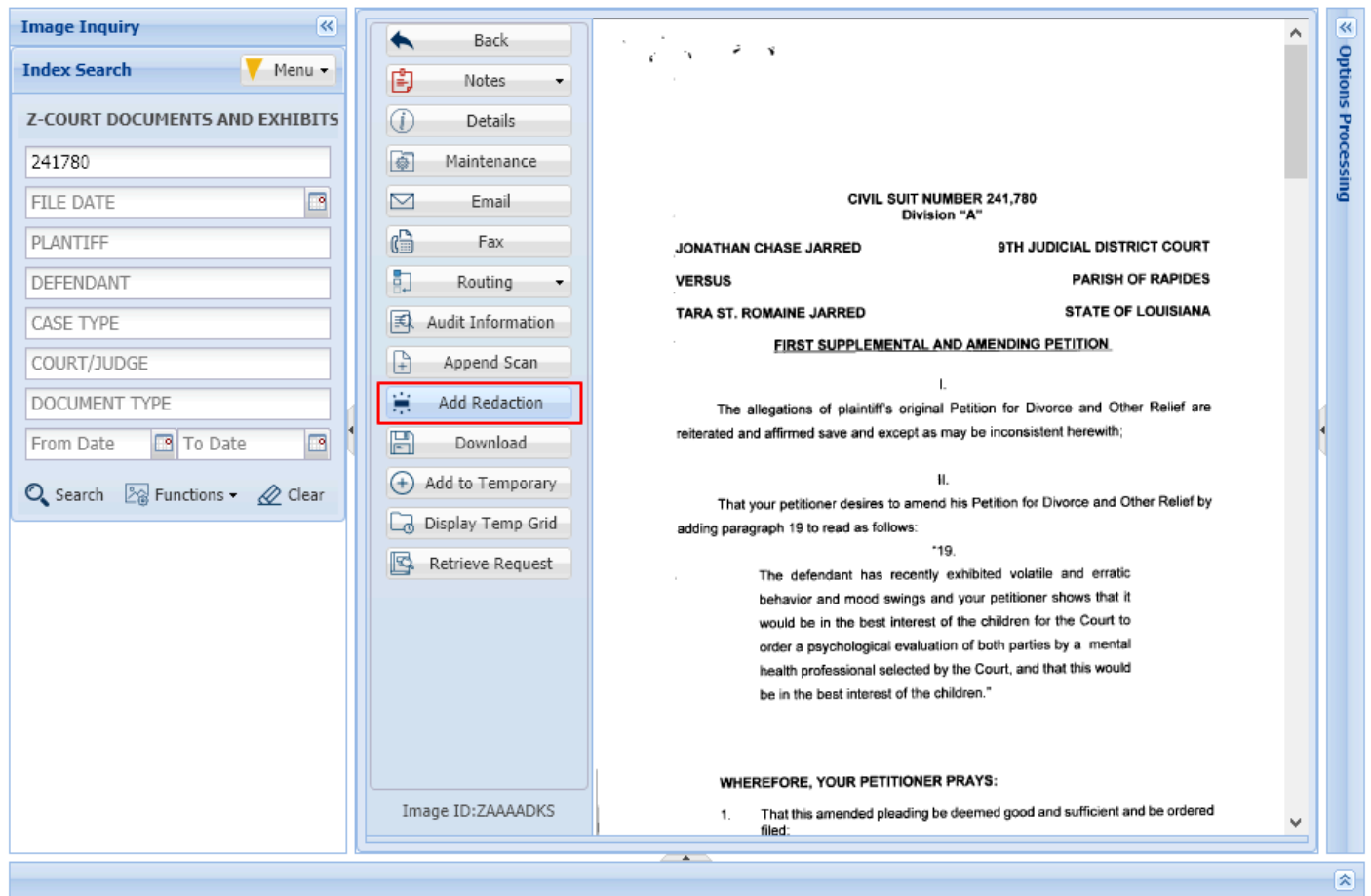
Once the image is displayed in the RVI PC Viewer, select the Redaction button then draw the redaction(s) onto the image. When complete, Accept or Do Not Accept the changes. The image will automatically be uploaded.
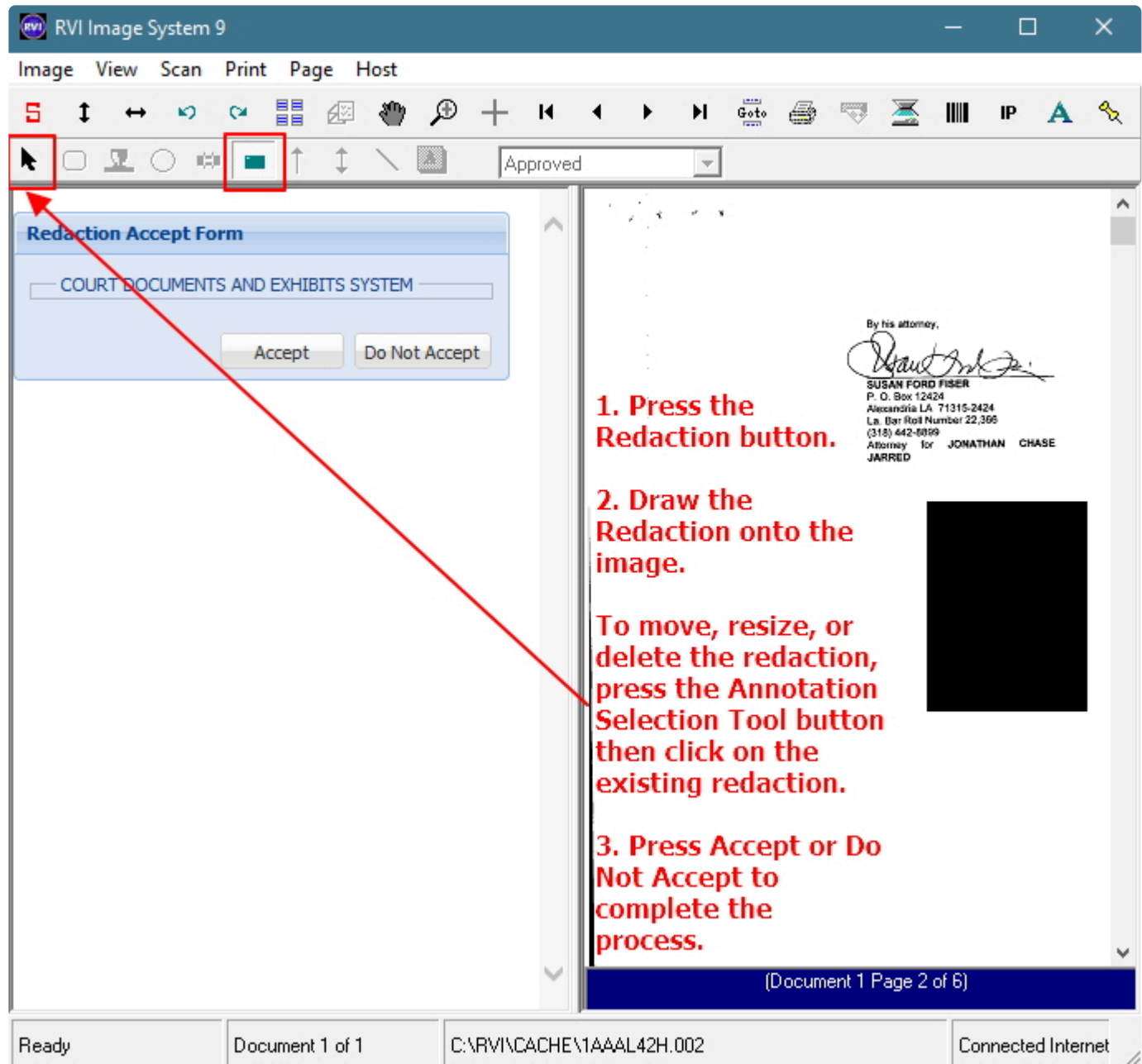
Spool Search: Allows for searching a spool file report based on multiple search criteria. This option will only be active when viewing a spool report (Image Type = T).
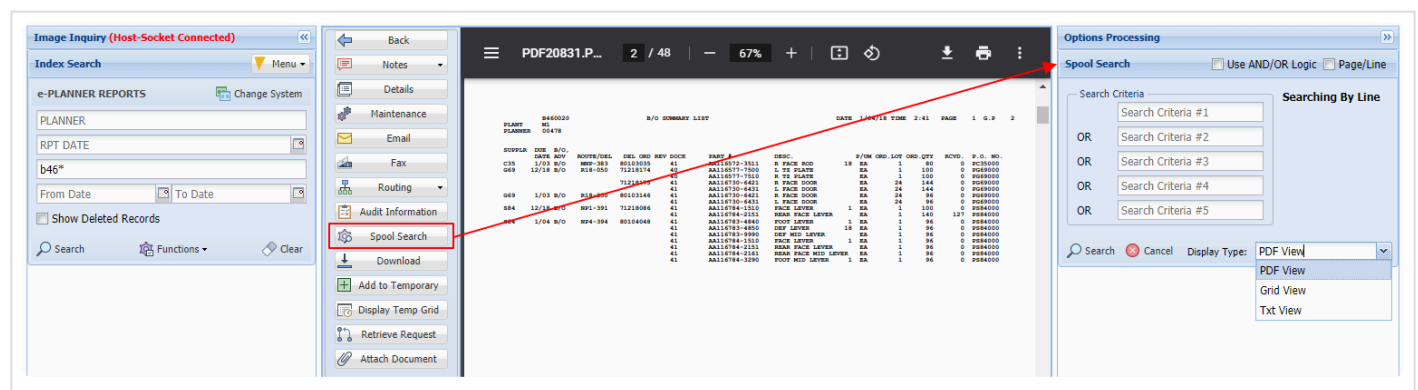
The results of the search can be displayed in PDF or Grid format.
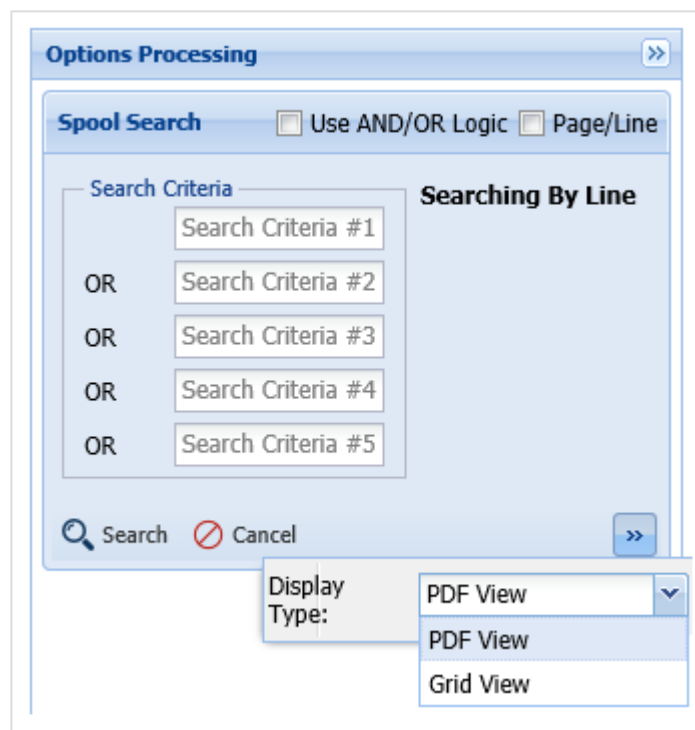
Download: Ability to save a PDF copy of the document. Users will be prompted to Open, Save, Save As, Save and Open, or Cancel.

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

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

(*The temporary grid is cleared automatically when the user logs off.*)
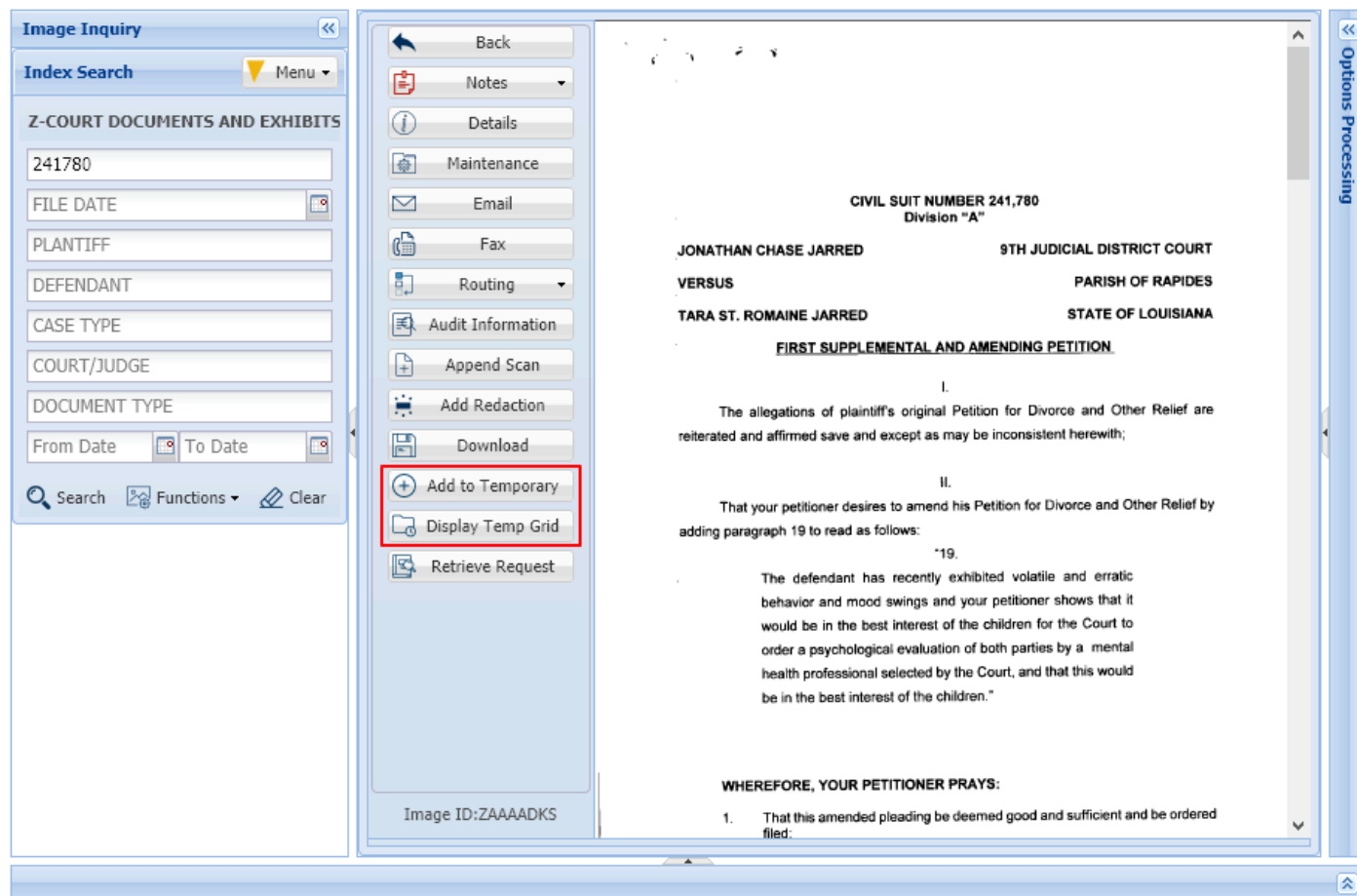
Display Temp Grid: Display a listing of files stored from any authorized system in the temporary folder.

Enable 'Combine' to view selected documents in a single file.

Temporary Grid option allows viewing documents from multiple Systems at the same time.

This example includes 3 Systems (C, M, Z).

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 can maintain the stapled documents by clicking the Stapling button in the display options .
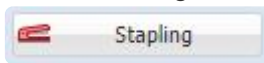
Sign Document: Apply a signature or finger print to a document. Customer must have a signature pad installed. Contact Real Vision Software support for requirements.

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* [Option Security](#) *on the server.)*
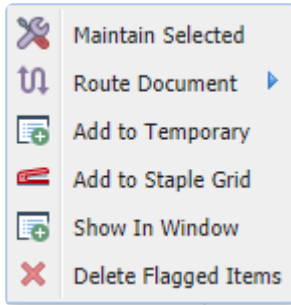
Show Notes: Displays notes associated with an image. *If notes do not currently exists, the user will not get the Show Notes option.*

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

Add Notes: Allows users to add notes to a document.
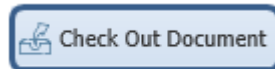
When a user is adding a note, the record can be checked out using the [Check Out Document] button to ensure that there are no conflicts between one or more users attempting to add notes to the same document.

Once you complete the notes entry select [Check In Document]

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

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

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

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

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

updating of index values and the deletion of the record.

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

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

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

	Flags	LOAD# ▼	ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES
☐	**1-IMPORTED MIQ DATA**								⚙ ? ↻	

1-IMPORTED MIQ DATA

◁◁ ◁ Page 1 of 1 ▷ ▷▷ ↻   Displaying 1 - 9 of 9   🔍 Retrieve Request   📄 Display Checked   ≡ Display Options ▾

☐	Flags	LOAD# ▼	ORDER#	PRO#	DOC TYPE	INDEX 8	INDEX 9	TYPE	CREATE-DATE	PAGES
☐	L V	FREDDC11			DOC1			IMAGE	2018/09/01	006
☐	L				DOC2			IMAGE	2018/10/31	001
☐	R L			0000002	DOC4			IMAGE	2018/08/30	007
☐	R L			0000003	DOC5			IMAGE	2018/08/30	012
☐	R L V			0000004	DOC6			IMAGE	2018/08/30	016
☐	L				DOC7			OEM	2019/04/03	001
☐	R L				DOC8			IMAGE	2018/08/23	001
☐	N R L				D0C3			IMAGE	2018/08/28	006
☐	R L				121			IMAGE	2018/08/28	005

Context menu:
- ⊕ Add Notes
- ✉ Email Image
- ⓘ Index Details
- 🖉 Index Maintenance
- ↵ Route Document ▸
- 🖉 Linking ▸
  - C-COURT SYST
  - D-AP SYSTEM
- ↻ Load Indexes
- 🧾 Audit Information
- 💾 Add to Temporary
- ✂ Add to Staple Grid
- ⧉ Show In Window
- 💾 Download
- 🗑 Delete Item

(PDF)   Device Id:$00121760 | User Id: MCKENZY   © Real Vison Software. All Rights Reserved.

Load Indexes: Uses the index values of the selected record to populate the index search pane.
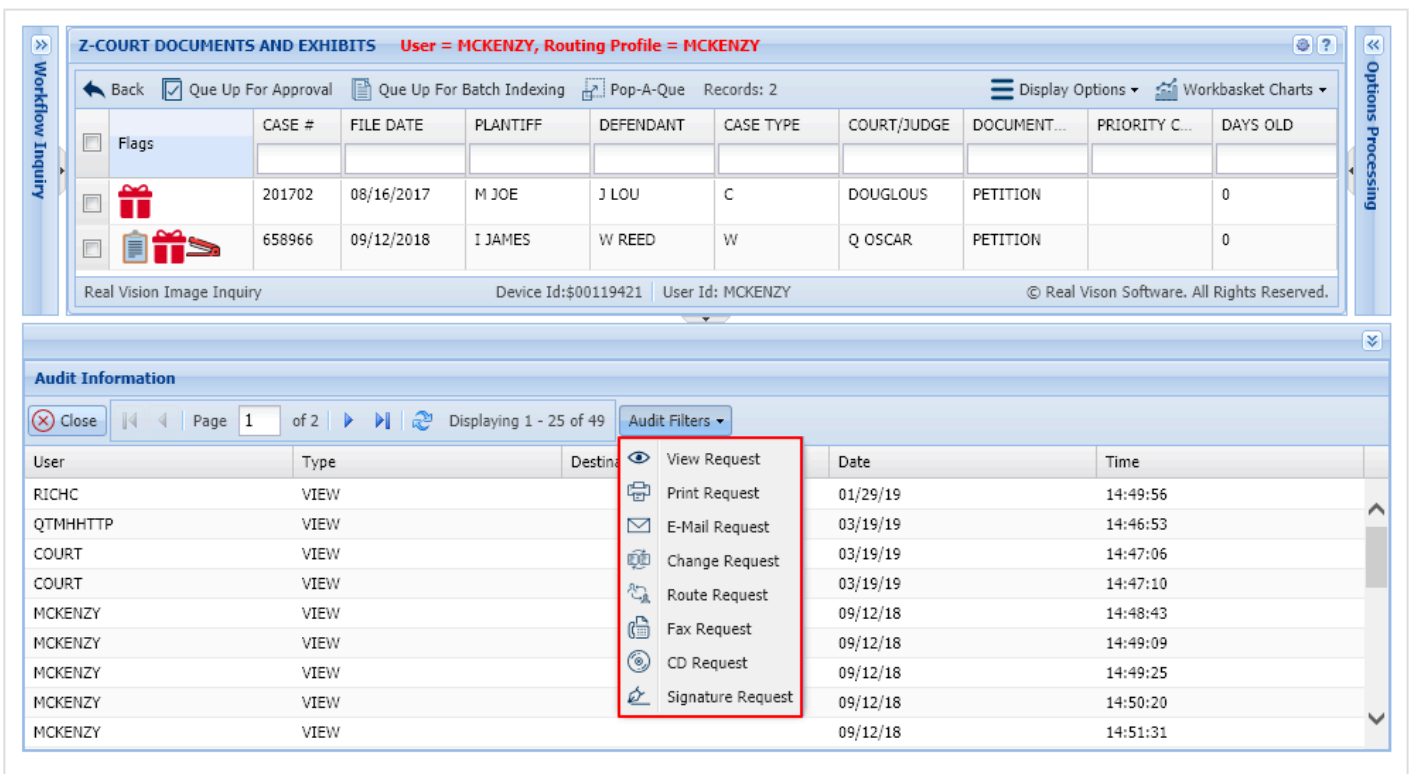
Load Indexes will populate the Index Search screen with the index values associated with selected record.

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

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

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

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

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

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

Download: Save the selected document to local storage.

Delete Item: Delete the selected record from Image Inquiry.
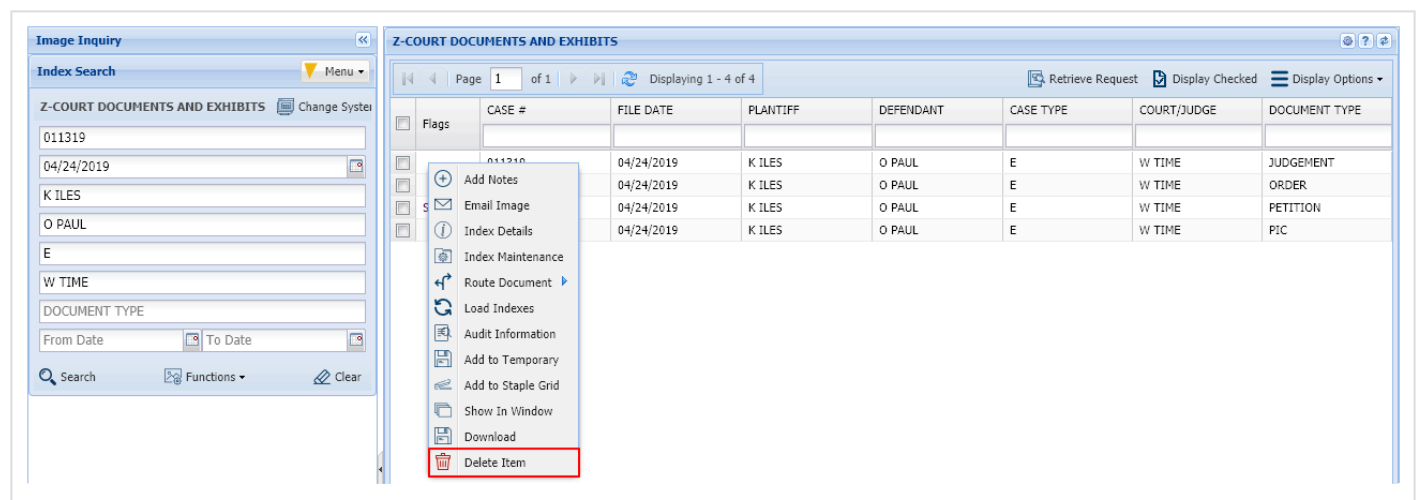
Undelete Item: Remove the delete designation from a record in Image Inquiry. The user must have authority to view deleted records in order to access this option.

Z-Options: Custom functions for your organization. Refer to [Z-Options](#) topic.

8. FUNCTIONS

RVI One Look provides the following functions:

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

8.1. Additional Index Filter

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

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

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

Additional search criteria include:

- Routed Items
- Noted Items

8.2. Advanced Search

To watch a video on this topic CLICK HERE.

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.

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

Horizontal Search:

Include an index record if:

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

Continuing through ALL Grid Rows.

Example: Horizontal Search Using Finalize Search

Example: Horizontal Search Using Finalize W/Totals

Example: Horizontal Search Using Finalize W/Totals & View

Vertical Search:

Include an index record if:

- Any indexes from Column 1 match

  AND

- Any indexes from Column 2 match

AND

- Any Indexes from Column 3 match
  Continuing through ALL Grid Columns.

Example: Vertical Search Using Finalize Search

WildCard Search Example:

> ❗ 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**.

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

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

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

Image Inquiry (Host-Socket Connected) «

Index Search ▼ Menu ▾

Z-COURT DOCUMENTS AND EXHIBITS 🖳 Change System

| CASE # |

| FILE DT |

| PLANTIFF |

| DEFENDANT |

| CASE TYPE | ▾ |

| COURT/JUDGE |

| DOCUMENT TYPE |

| From Date | 📅 | To Date | 📅 |

An extra search criteria has been entered

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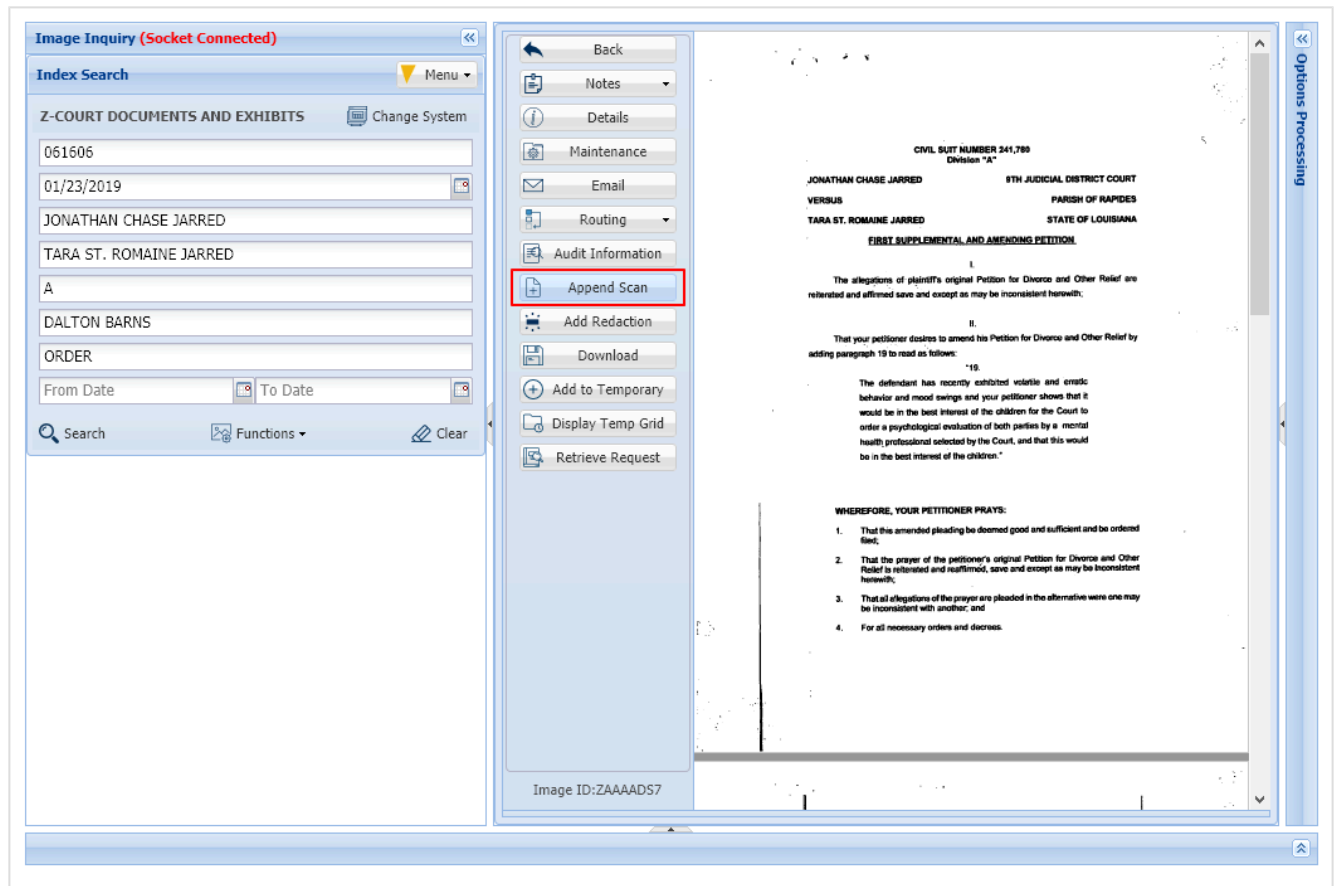
This will open the RVI PC Viewer. If the user is set to PC Control scanning, they will have to click Page or Batch to begin the scan process. If the user is set to host control, the scanning will automatically begin.

3. Click **Finished** when scanning is complete.
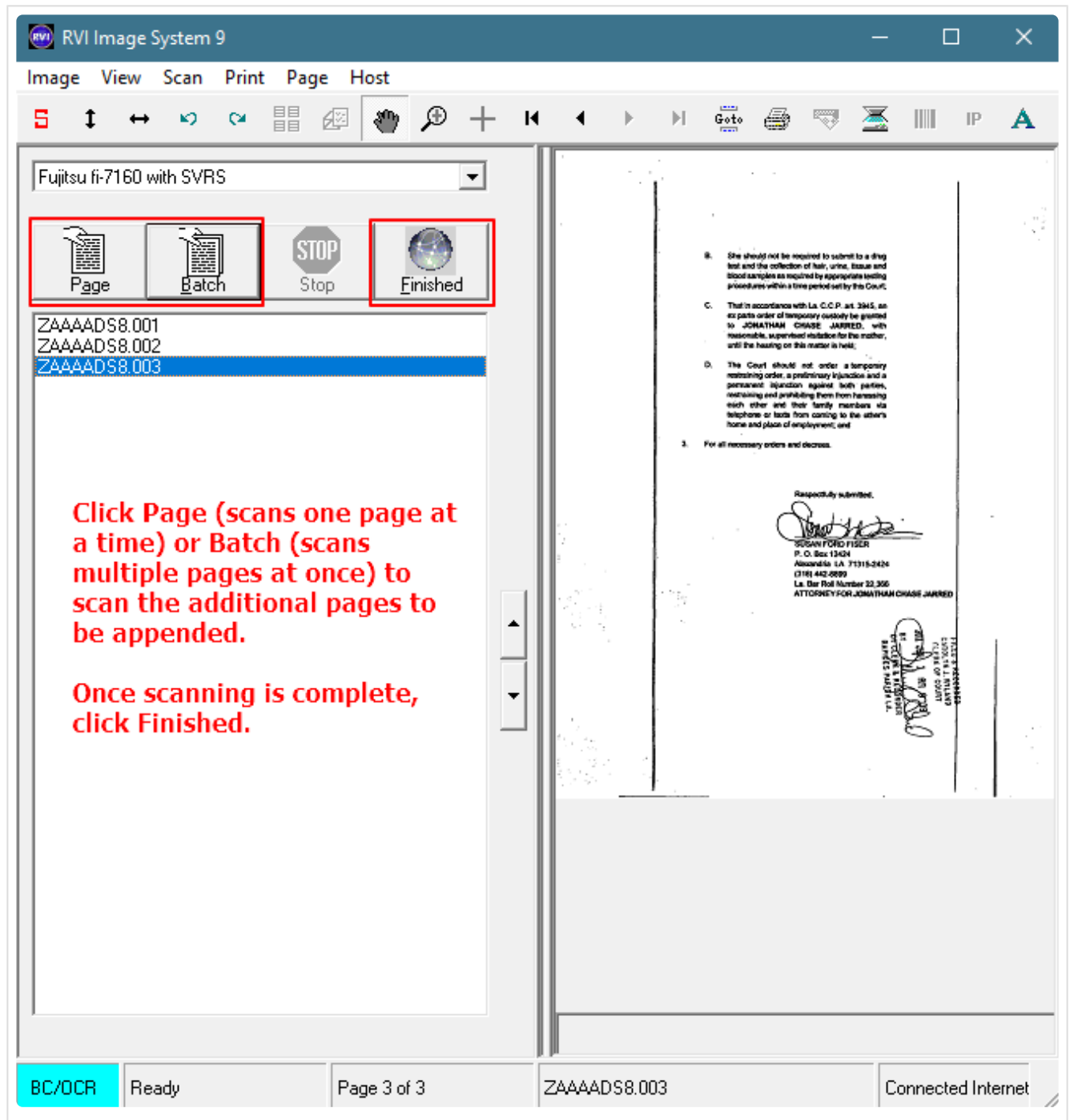
4. Click **Accept**, **Continue**, or **Do Not Accept**.
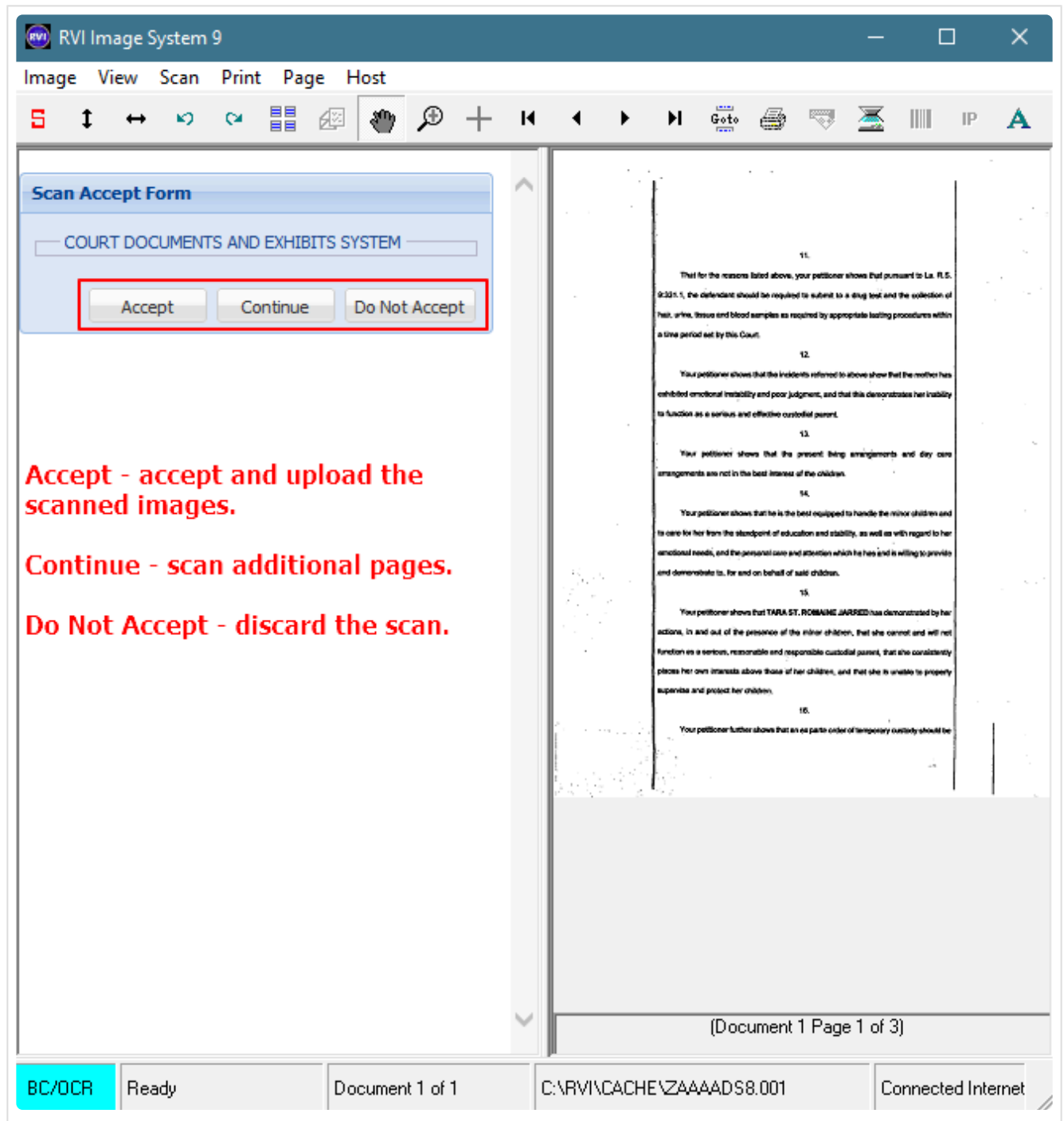
If the scan is accepted, the upload confirmation screen will open.

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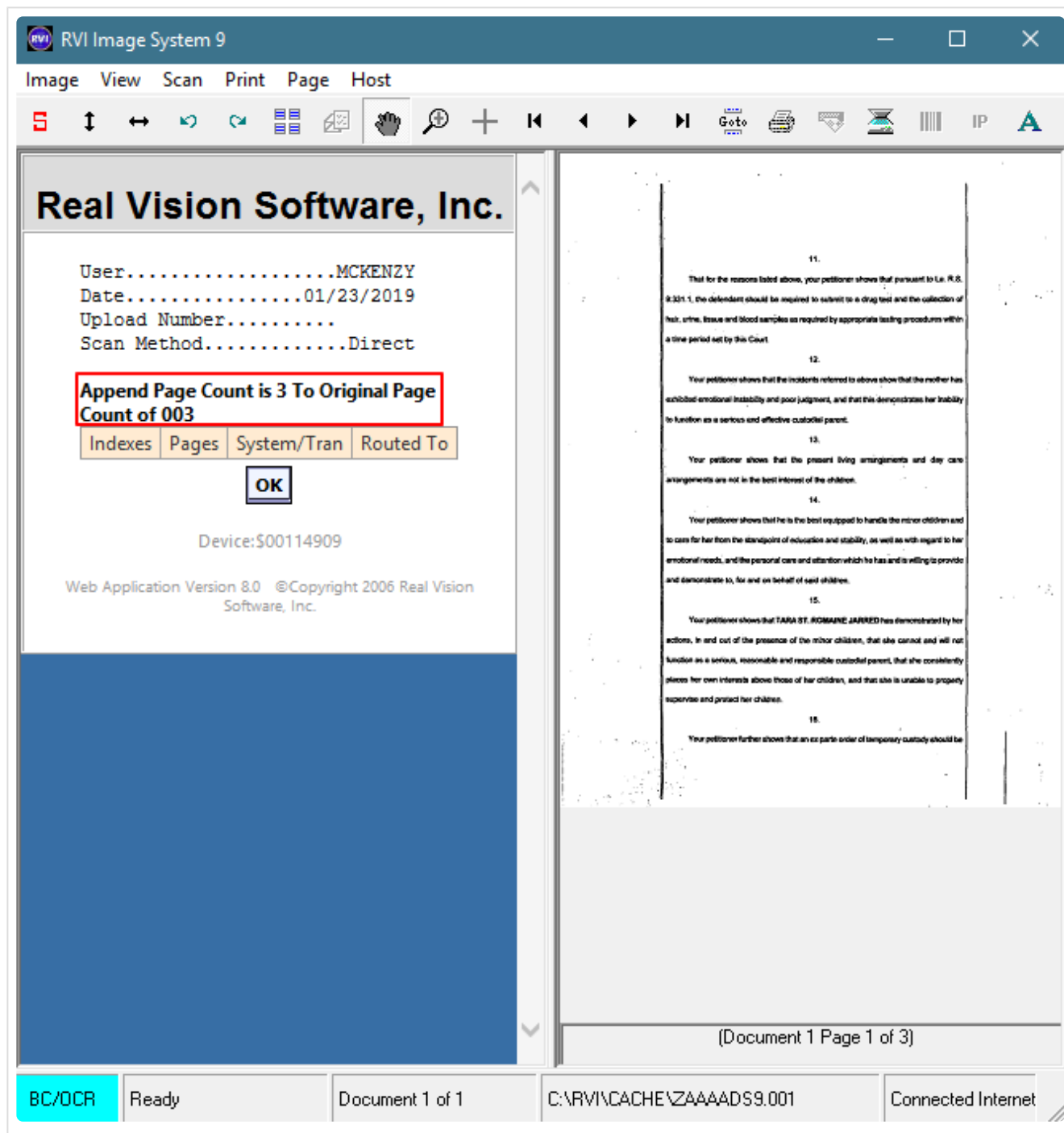
8.4. Audit

Audit is available in WorkBaskets and Image Inquiry. RVI also offers a [dashboard](#) 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.

OR

Double-click a record to display a document. The audit options are found at the bottom left hand corner of the screen.
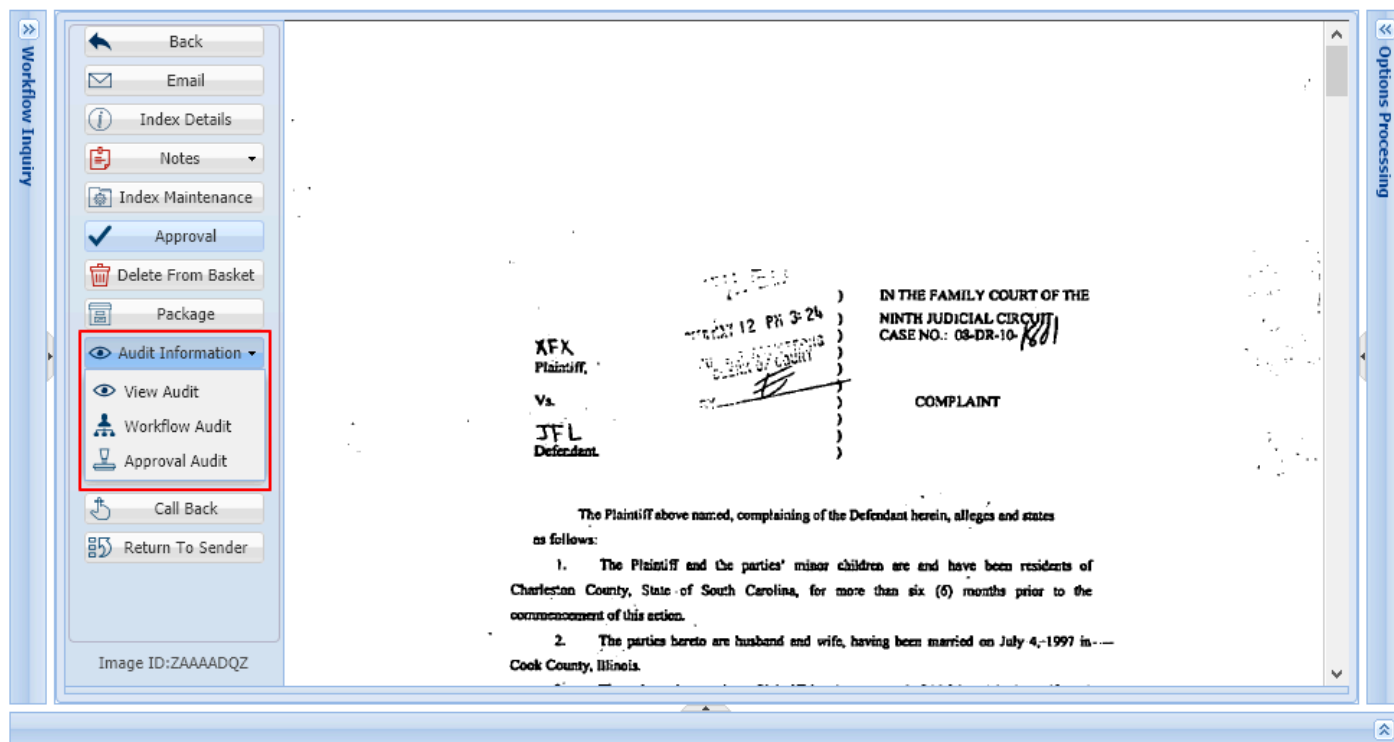
View Audit to display the audit information pane along with the audit filters option.

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

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

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.

Audit Information Options:

to select the desired request type to be queried. By default, the audit request type is set to *View Request*.
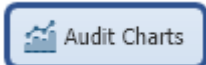
Audit Charts   to access downloadable bar and pie charts depicting the audit results.

| Bar | Pie |

Download Chart

MCKENZY - 2
MONTY - 2
QTMHHTP1 - 1

Page 3 of 5   Displaying 3 - 3 of 5
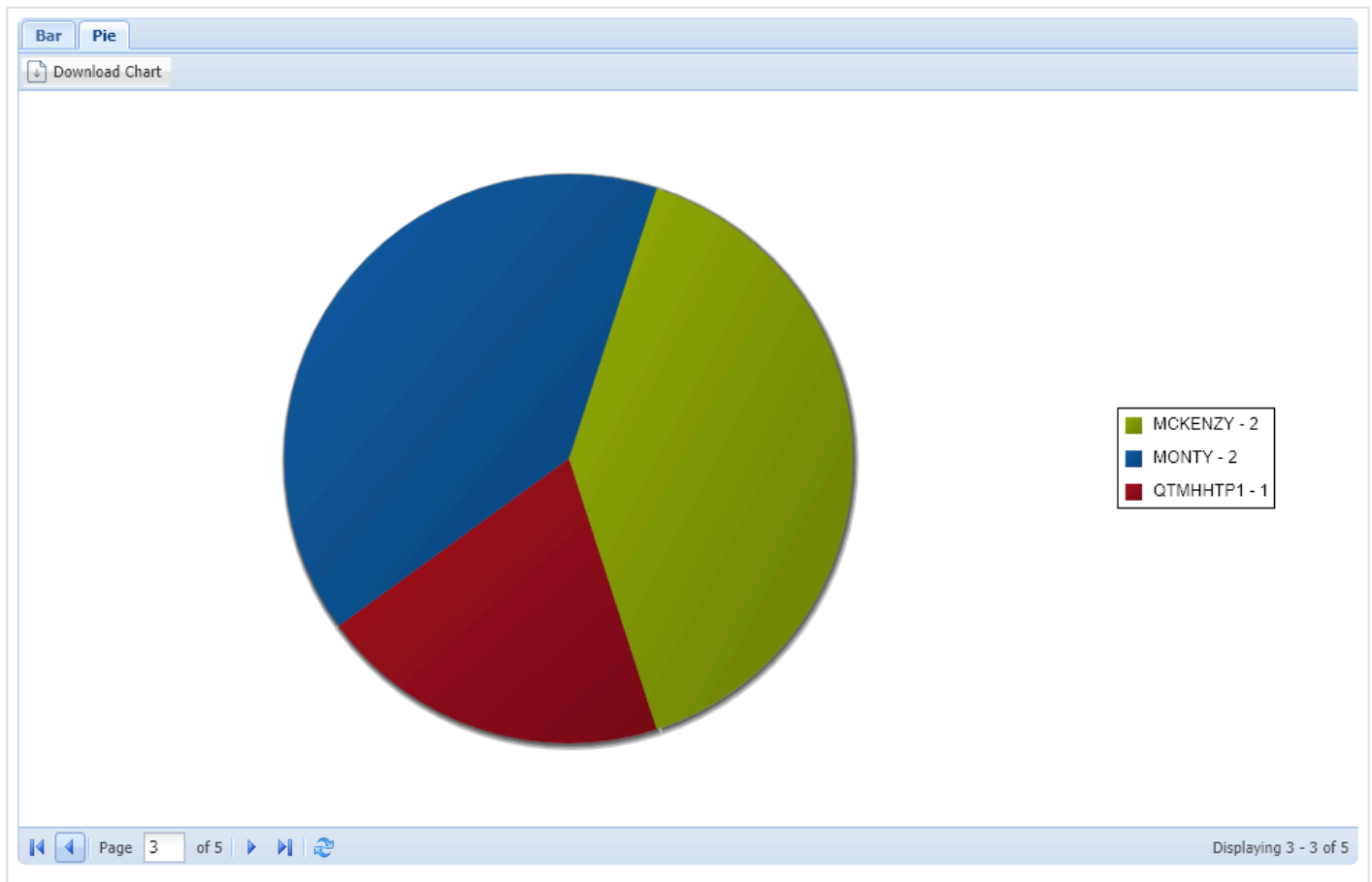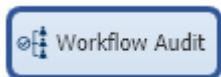
 to display the associated workflow audit associated with the document being viewed.

8.5. Batch Indexing

1. Select Functions/Batch Indexing

2. Single mouse click the batch to be worked.

3. Index the image.
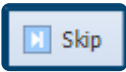
*   Prior to indexing, you can click [Change System] to assign the document to a new system id code.

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

4. Click **Submit** to save the index values.

OR

5. Click **Skip** 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:
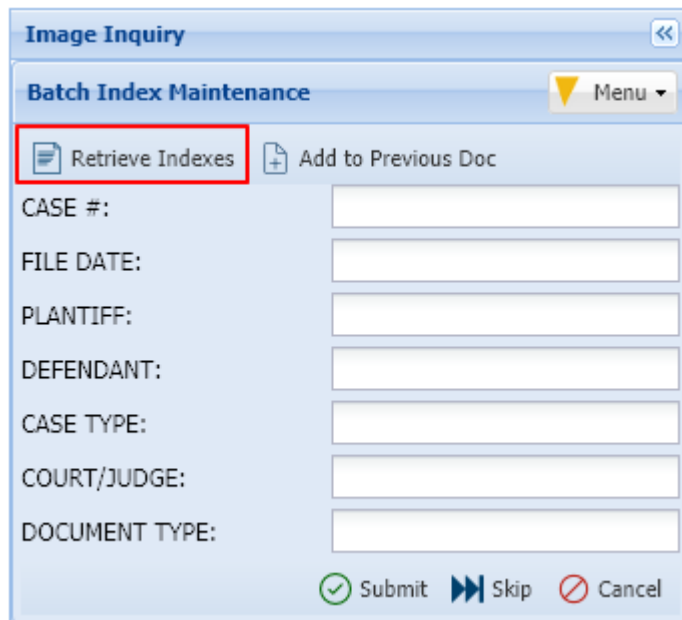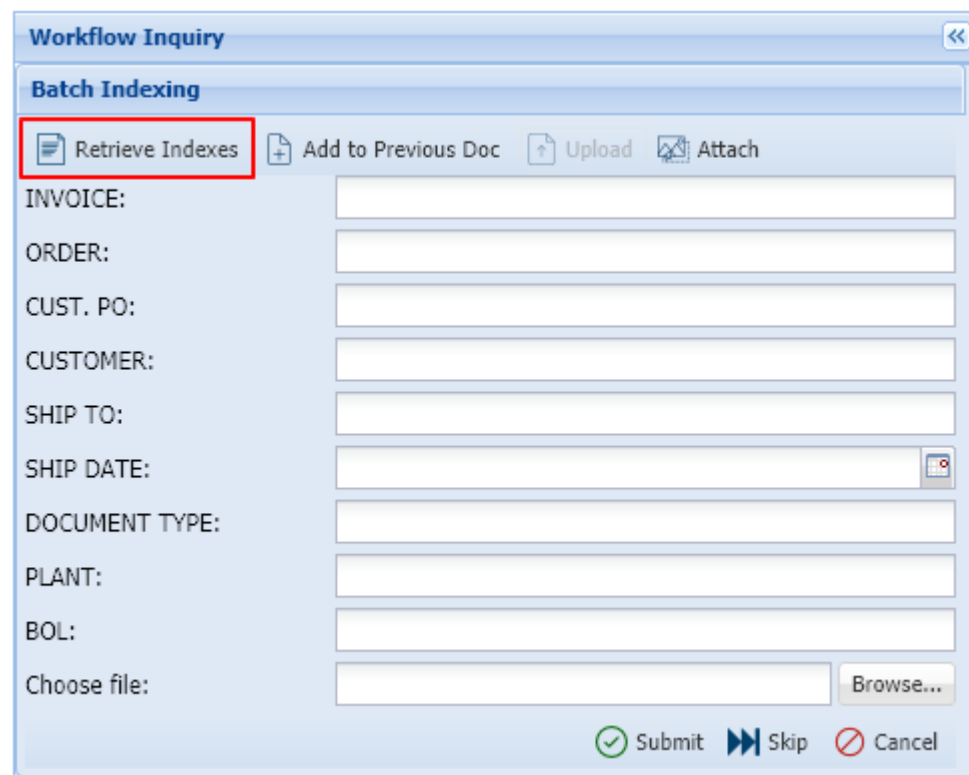
WorkBasket:

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.

8.6. Drag Drop/Import

To watch a video on this topic CLICK HERE

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

> **!** One Look requires the RVI PC Viewer for drag drop. The RVI PC Viewer must be
>
> Connected: IBM DATA QUEUES
>
> **Connected: IBM DATA QUEUES** for drag drop.
> If you are using Browse Import, the RVI PC Viewer is not needed.
> The One Look browser must be **Host-Socket Connected**
>
> Image Inquiry (Host-Socket Connected) «
>
> for drag drop and browse import.

> Refer to Setup/Maintain IBMi Host Socket 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 (RVI.EXE).

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)**
2. 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 RVI PC Viewer for drag drop. The RVI PC Viewer must be
>
> **Connected: IBM DATA QUEUES** Connected: IBM DATA QUEUES .
> The One Look browser must be **Host-Socket Connected**
>
> Image Inquiry (Host-Socket Connected) .
>
> Refer to Setup/Maintain IBMi Host Socket under *How To Instructions* section for details on workstation configuration when using Host Socket.

1. Open the RVI PC viewer.

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

3. Navigate to One Look.

4. Enter the index values.

5. Select Functions, Drag Drop/Import Functions, **Drag Drop (Indexes Above)**.
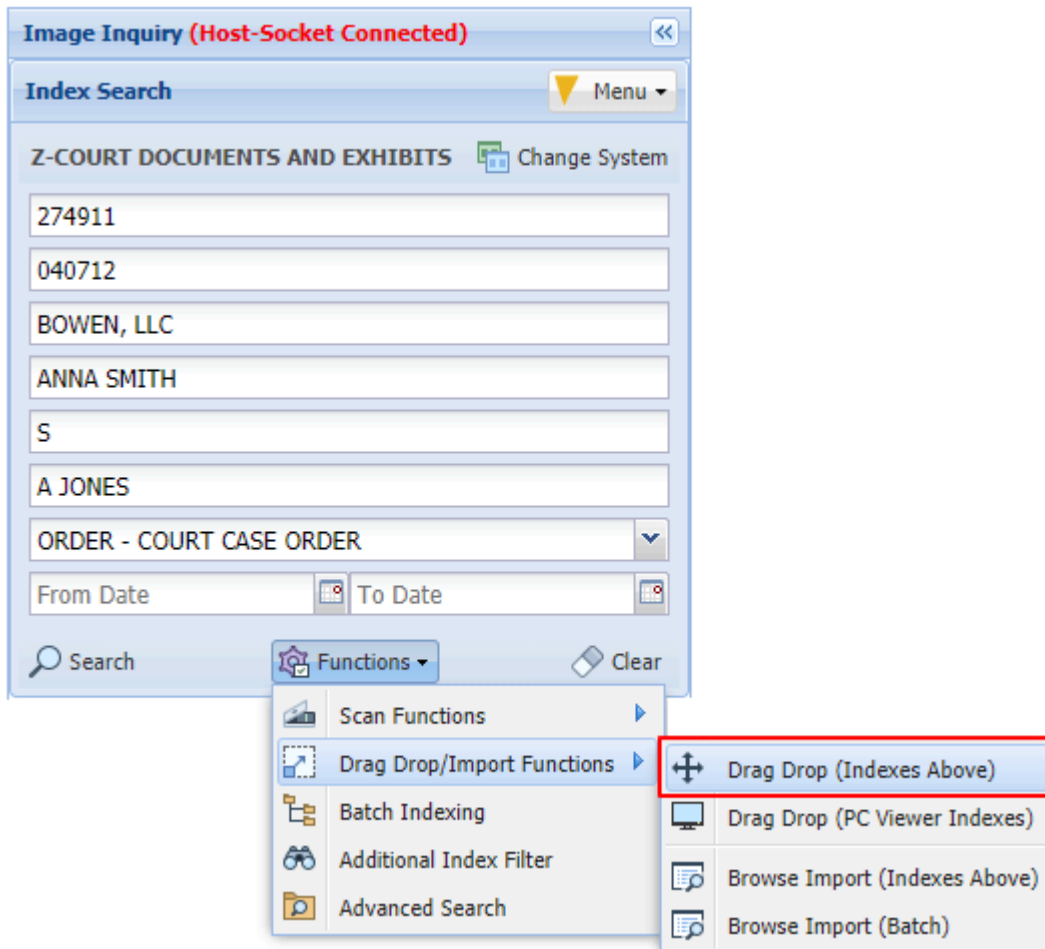
8.6.2. Drag Drop (PC Viewer Indexes)

> ! One Look requires the RVI PC Viewer for drag drop. The RVI PC Viewer must be
>
> Connected: IBM DATA QUEUES
>
> **Connected: IBM DATA QUEUES** .
> The One Look browser must be **Host-Socket Connected**
>
> Image Inquiry (Host-Socket Connected)   «
> .
> Refer to Setup/Maintain IBMi Host Socket under *How To Instructions* section for details on workstation configuration when using Host Socket.

1. Open the RVI PC viewer.

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

3. Click the BC/OCR button to index the file.

4. Click the CLOSE button when indexing is finished.

5. Navigate to One Look.

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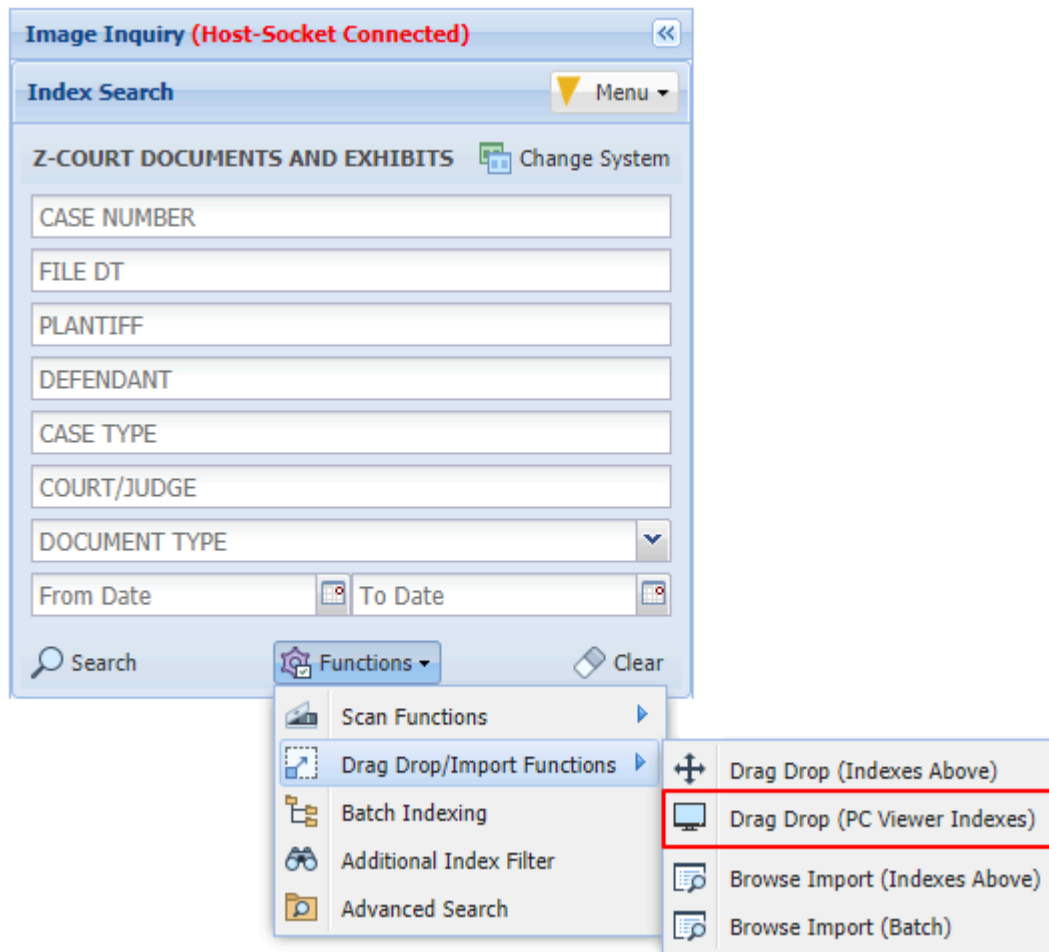
8.6.3. Browse Import (Indexes Above)

To watch a video on this topic CLICK HERE

From Image Inquiry:

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

2. Select Functions, Drag Drop/Import Functions, **Browse Import (Indexes Above)**.
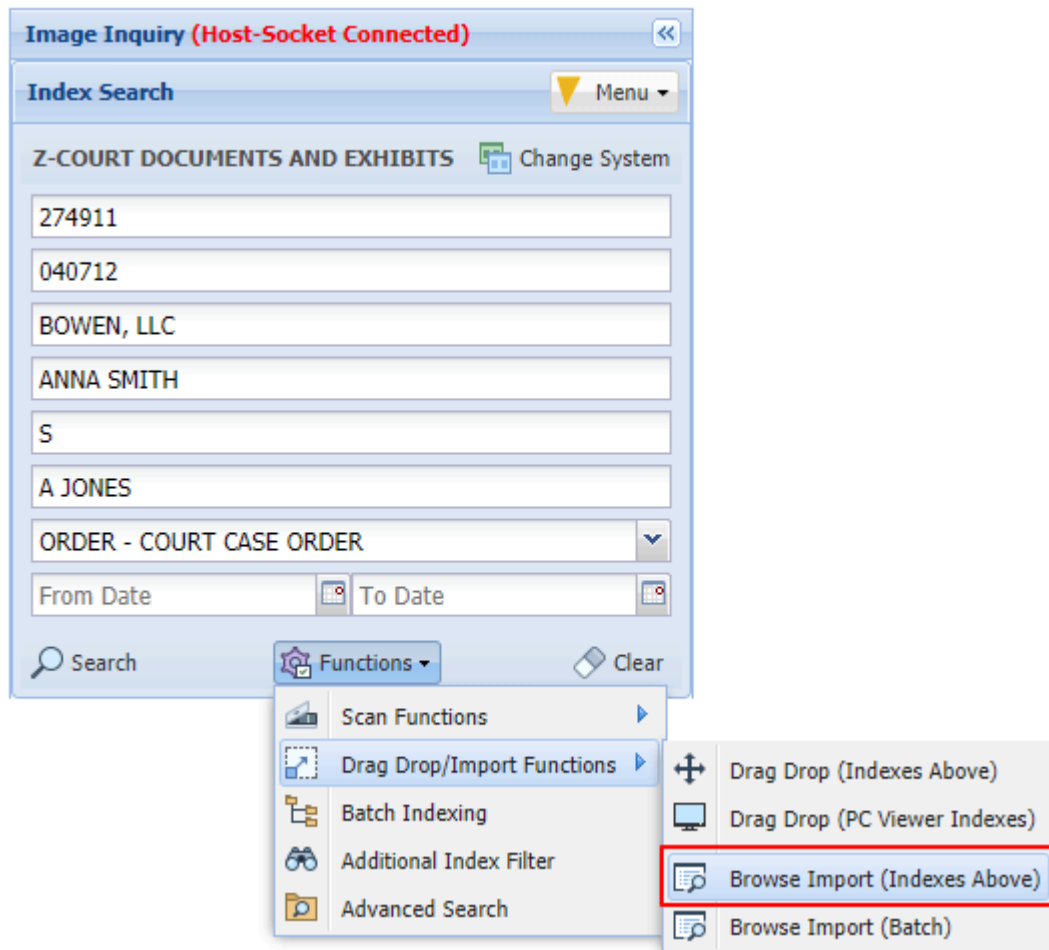
3. Click the **Add Files** button or drag drop files directly onto the window.
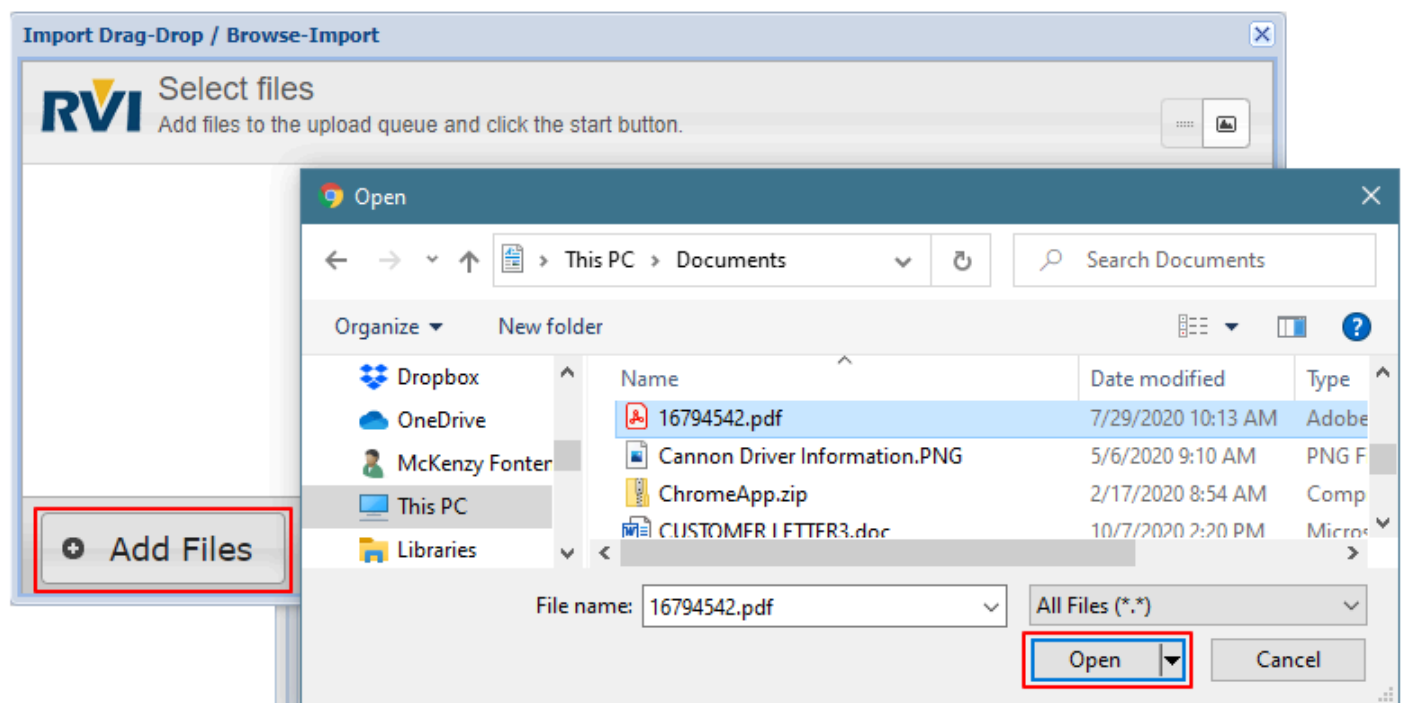
4. Click the **Start Upload** button to transmit the file(s) to the server.

   (*One record per file will be generated at upload time.*)
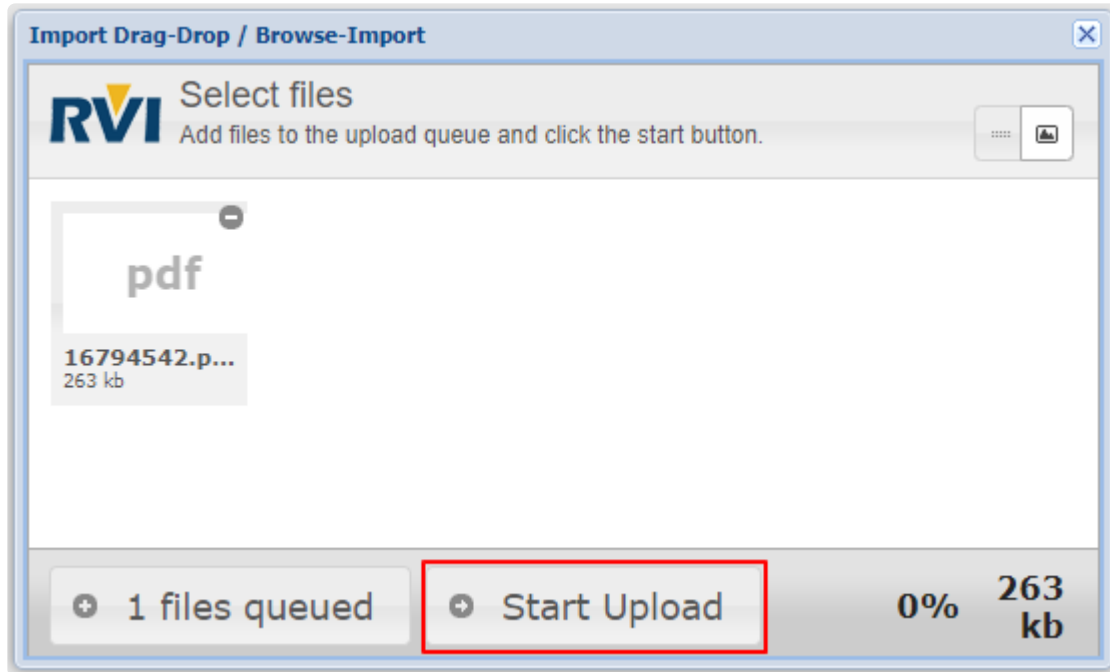
8.6.4. Browse Import (Batch)

From Image Inquiry:

1. Select Functions, Drag Drop/Import Functions, **Browse Import (Batch)**.
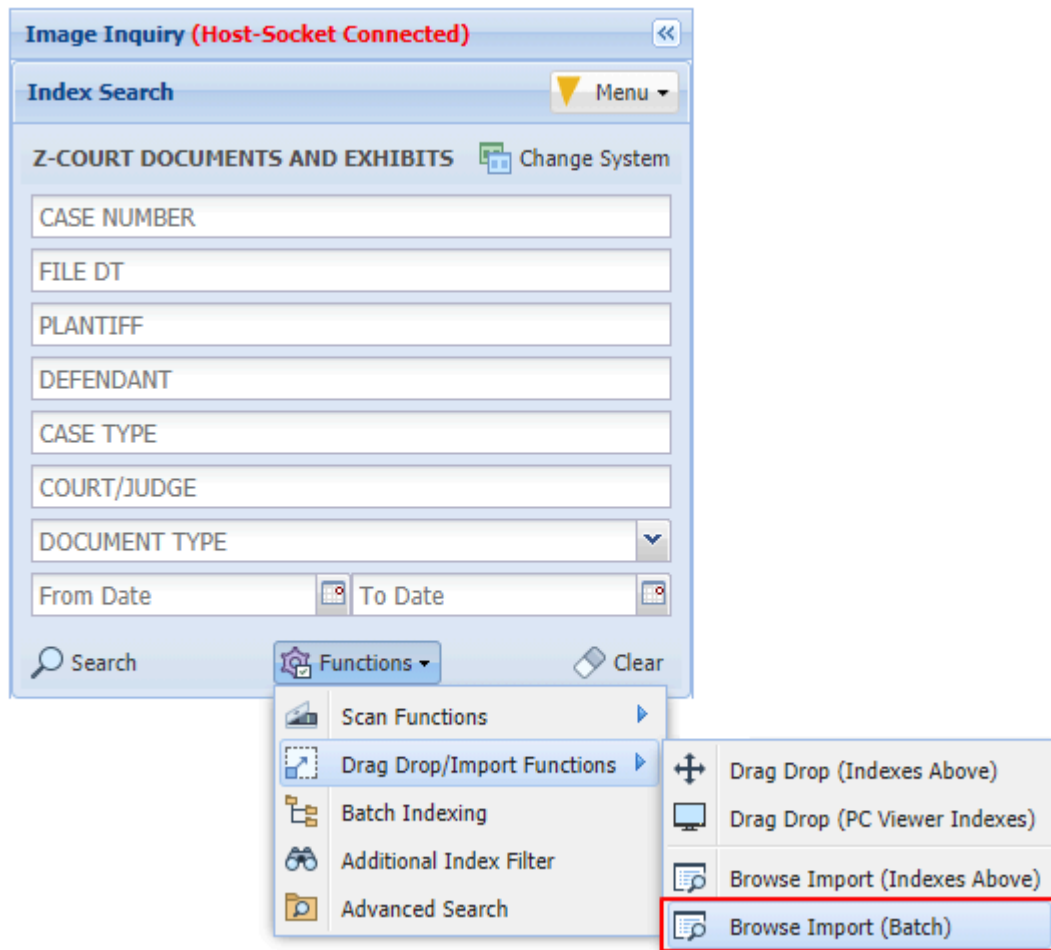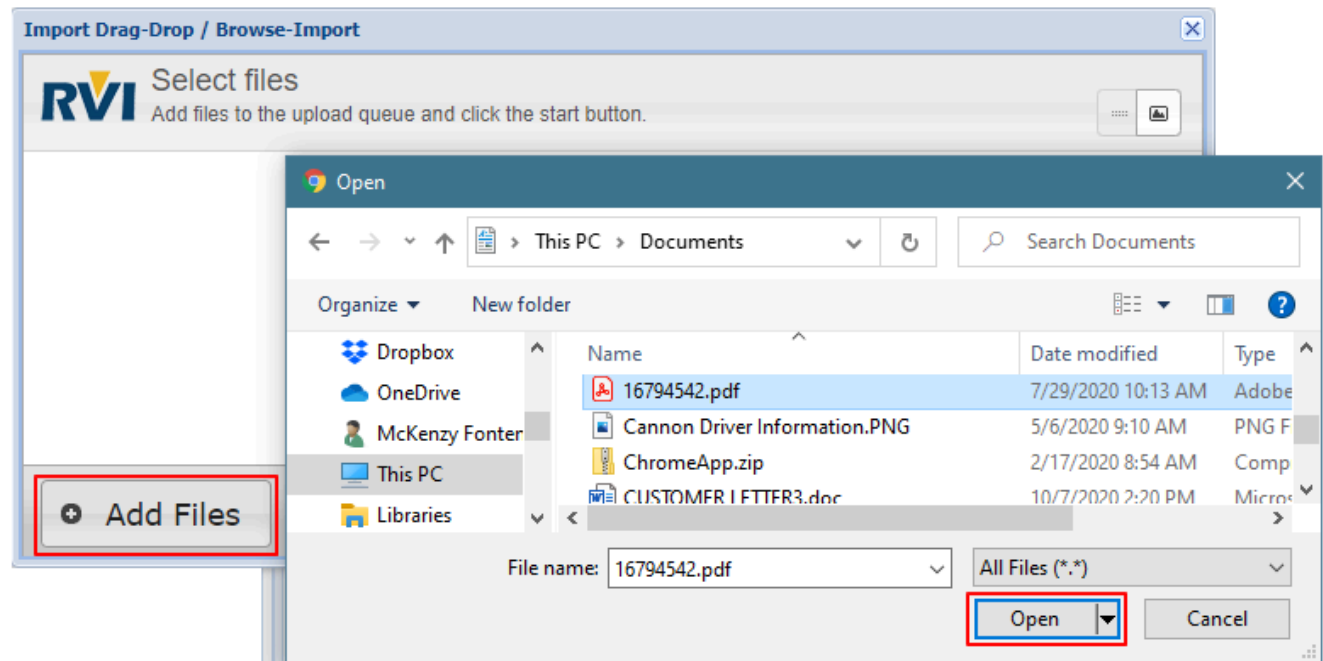
2. Click the **Add Files** button or drag drop files directly onto the window.

3. Click the **Start Upload** button to transmit the file(s) to the server.

   (*One record per file will be generated at upload time.*)
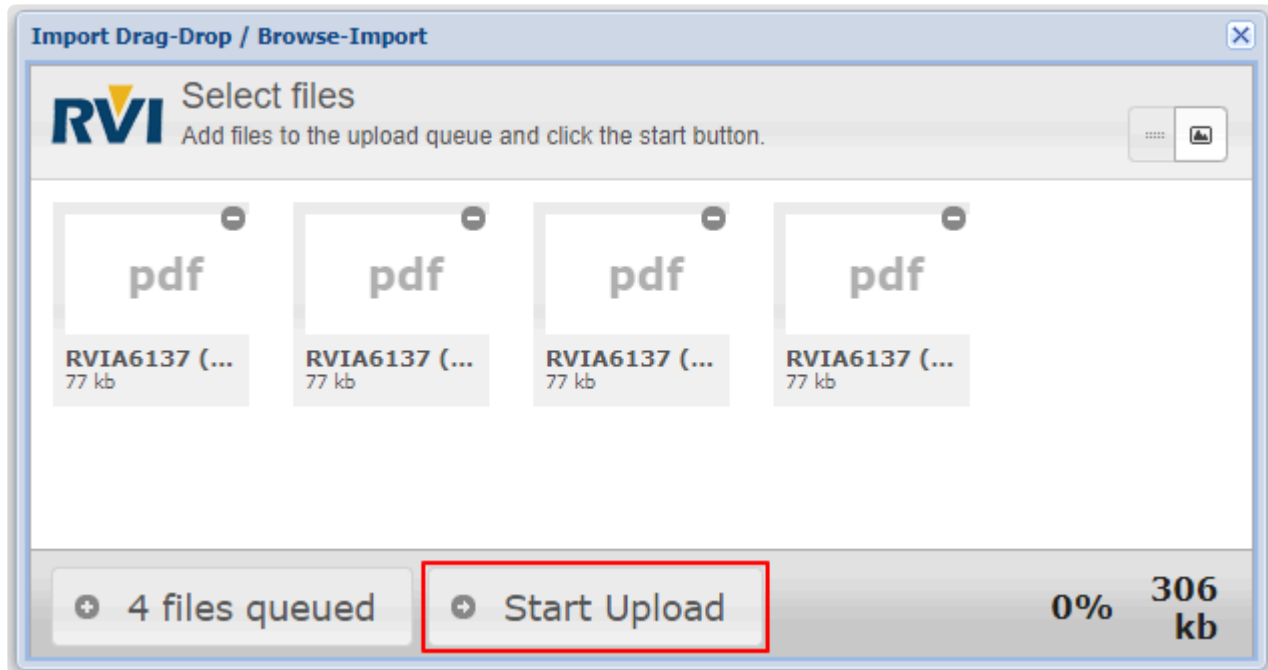
4. Select Functions, Drag Drop/Import Functions, **Batch Indexing**.
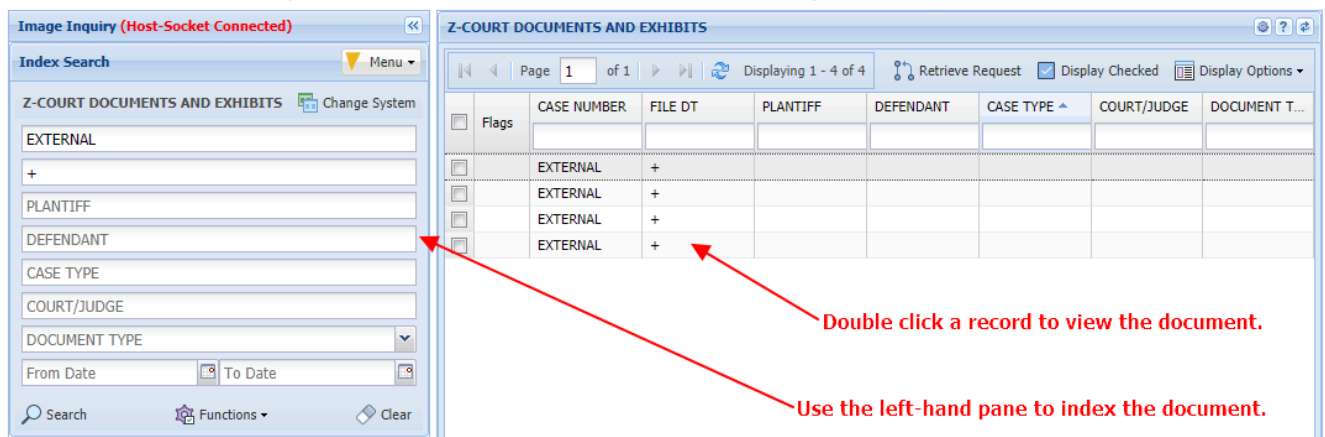
8.7. Document Packages

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

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

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

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8.8. Document Tabbing

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

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

8.9. Email

1. Double click a record to view the image.

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

2. Click [✉ Email]
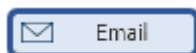
3. Fill in the fields under Options Processing, Email Image

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

4. Click [✉ Send Email]

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

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

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

8.10. Export To Excel

Grid to Excel: Display the One Look subfile list in Excel. Also, used in [spool file search](#) to display spool file reports in Excel.

✳ To export an individual spool file report to Excel, see Search and Extraction

8.11. Fax

Fax the document being viewed.

Contact Real Vision Software support for details on Faxing when using One Look.

8.12. File Import

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

8.13. Image Inquiry

To watch a video on this topic CLICK HERE.

1. Using a single mouse click, select a system code for inquiry.
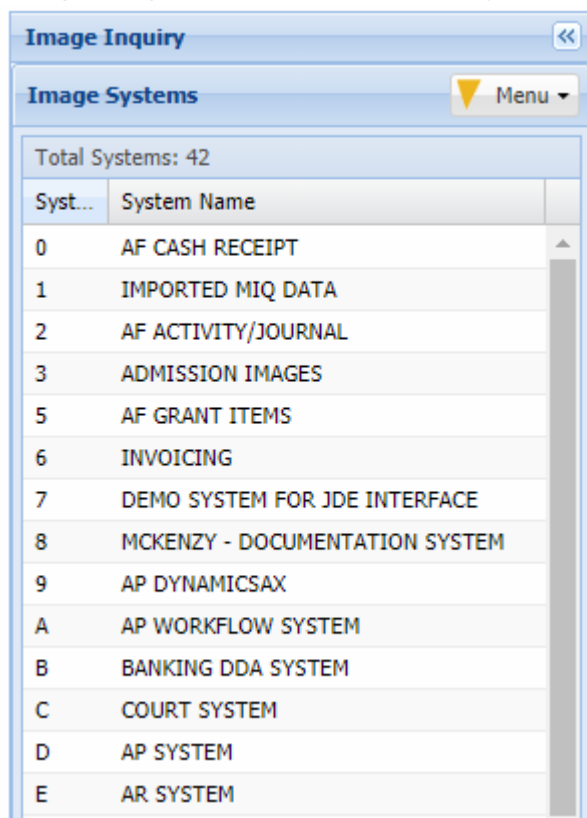
2. Input the desired index information to narrow down the search. *Wildcard searches are allowed.*

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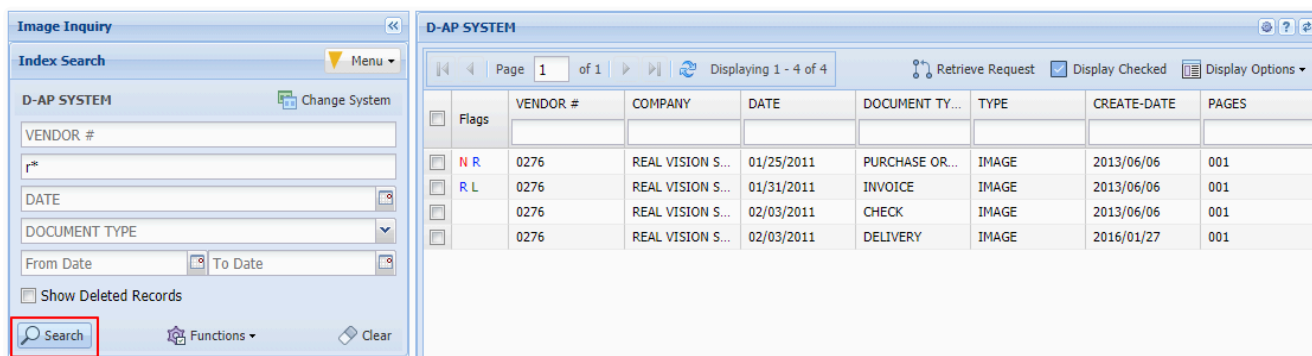
A subfile list matching your search criteria will appear in the right window pane. The subfile list can be sorted and grouped using the options under each column. Column selections can be enabled and disabled as needed.Mouse over to the right corner of the column then click the drop down arrow.

This is an example of **Sorting**.

This is an example of **Grouping**.

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

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 RVI to Viewer or selecting the toggle button to switch between One Look (PDF) or RVI PC Viewer (Viewer).

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

▲ (arrow)	Allows the user to select an annotation object to move, resize, or delete.
▢ (rectangle)	Draw a rectangle around an area of an image.
⬇ (stamp)	Draw a stamp value on an area of an image. The values available are listed in the Stamp Values drop down list.
○ (circle)	Draw a circle around an area of an image.
⬛ (highlight)	Highlight an area of an image using a transparent highlighter.
▪ (redact)	Redact an area of an image using an opaque highlighter. Redaction requires a special security setup.
↑ (single arrow)	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.
↕ (double arrow)	Point to two simultaneous areas of an image using a double arrow.
╲ (line)	Add a line to an area of an image using the line tool.
A (note)	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.
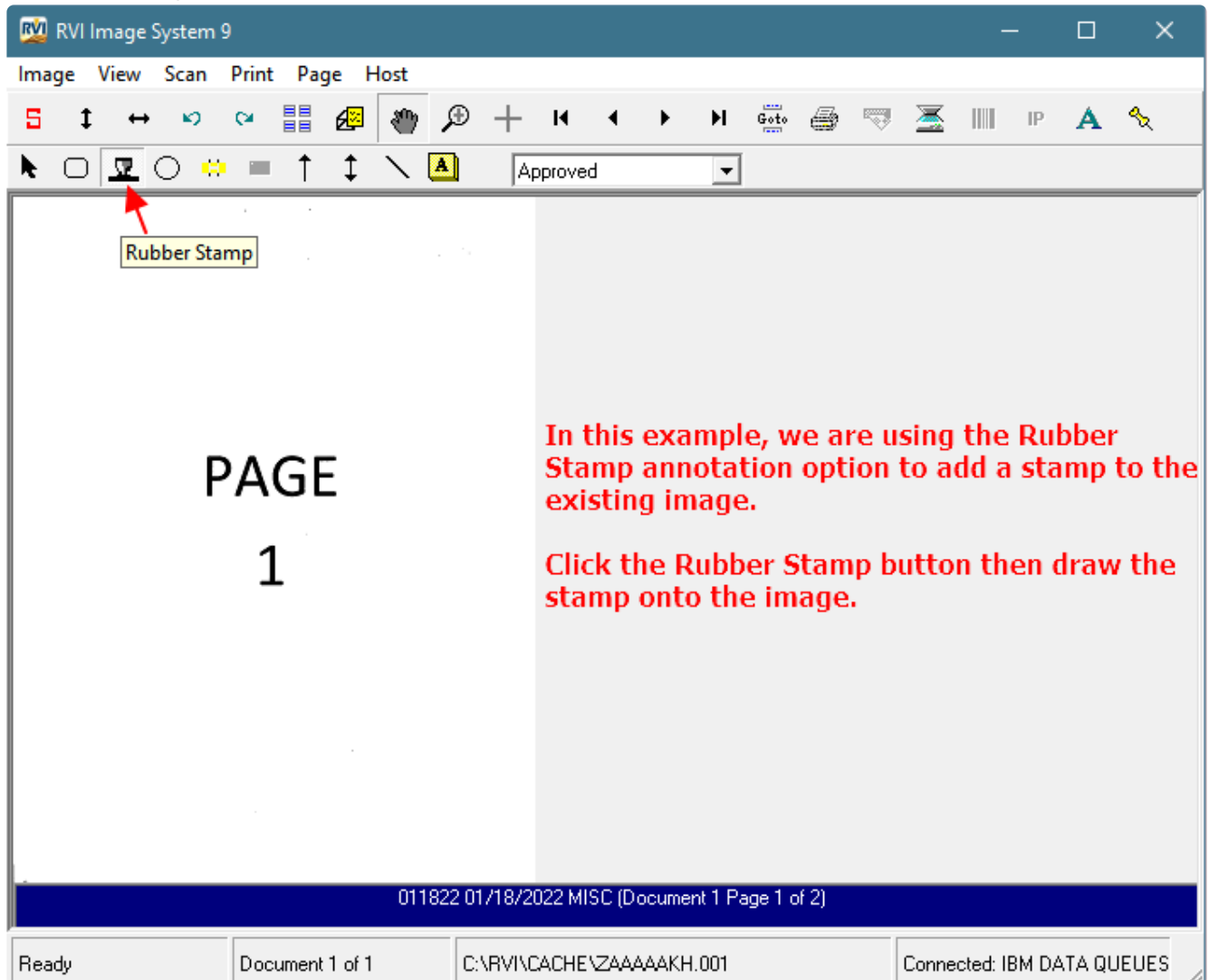
To Modify a Markup:

- Click the Select Cursor Tool , then click on the existing markup and make any needed modifications and deletions.
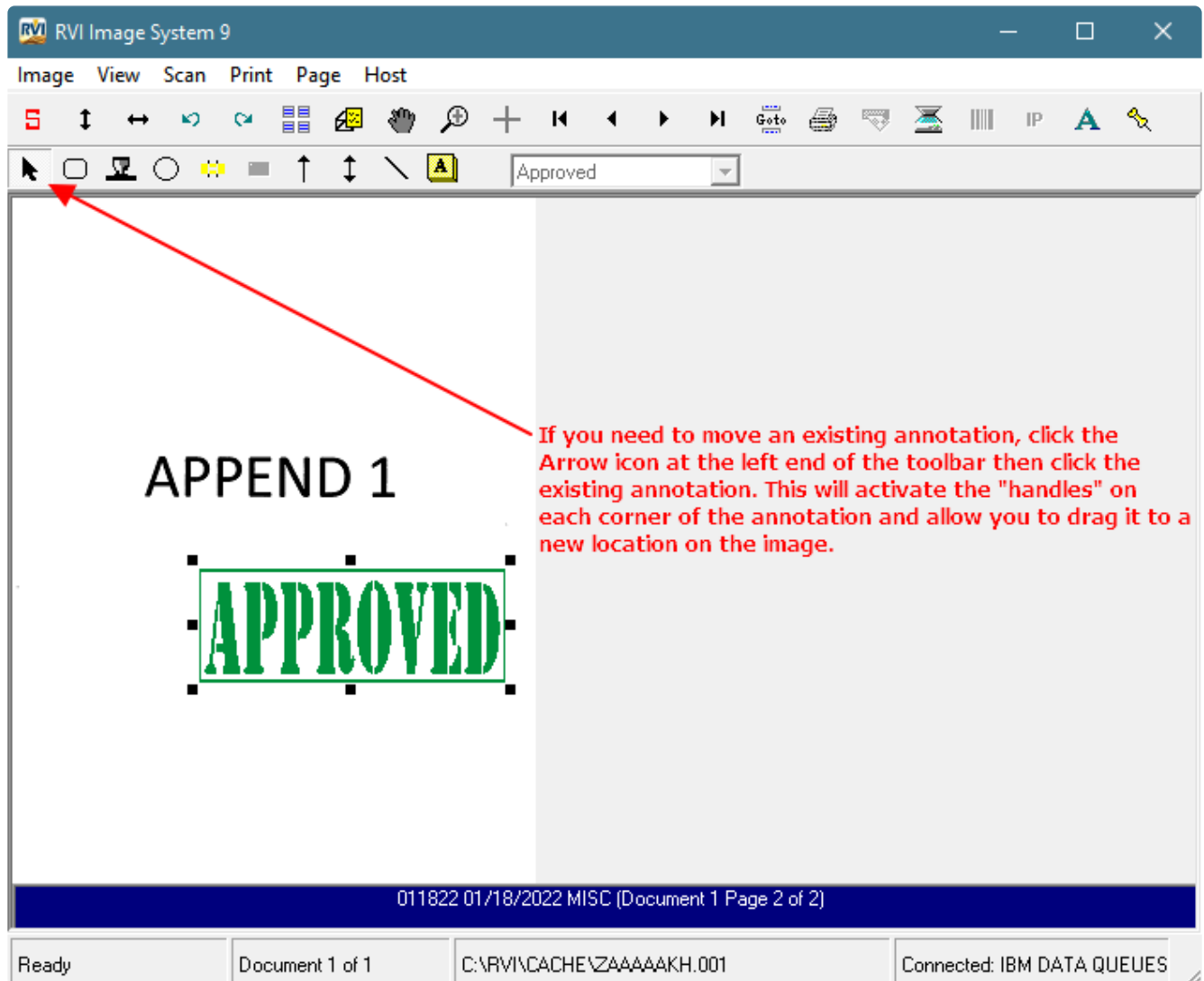
To Save a Markup:

- Click *Image/Close* in the top left hand corner of the RVI PC Viewer.
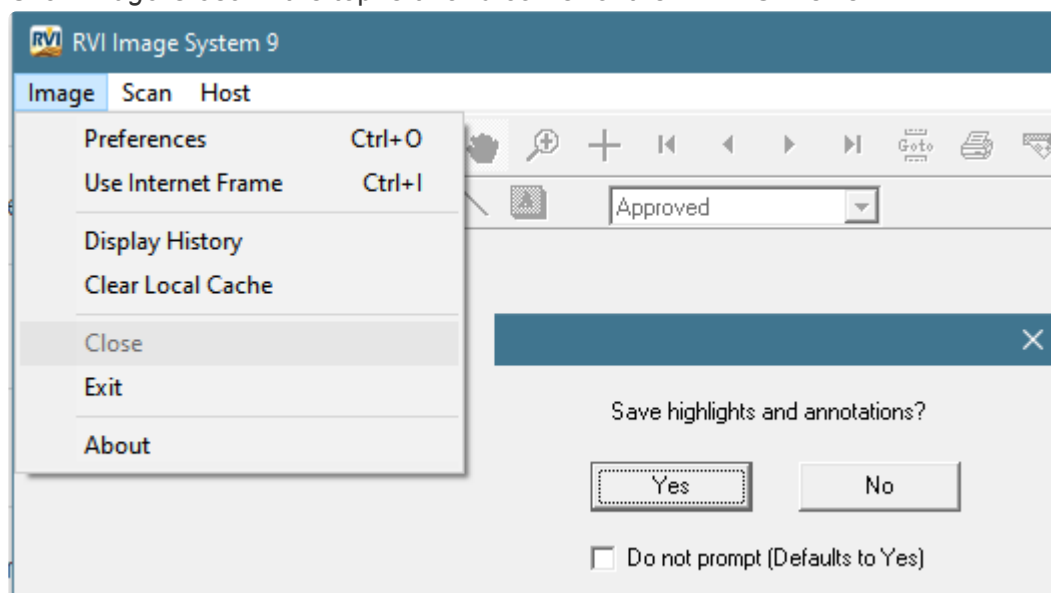
> ✳ Any user can add/modify markups unless restricted by securing option code 2 (Highlighting) on the IBM i.

8.15. 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. Thiis allows users to be able to update sensitive index information without stepping on the original record.
- If **Delete Record** is checked, the item will be removed from image inquiry.

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.
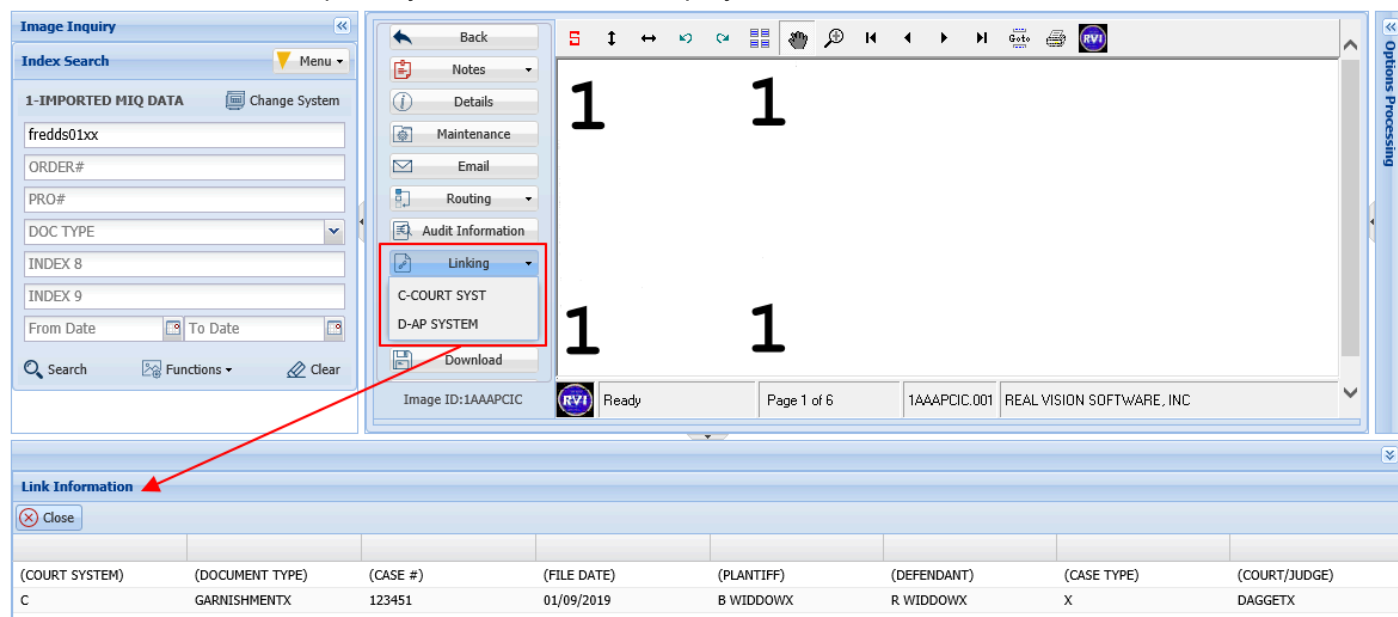
Two options to access Linking:

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.

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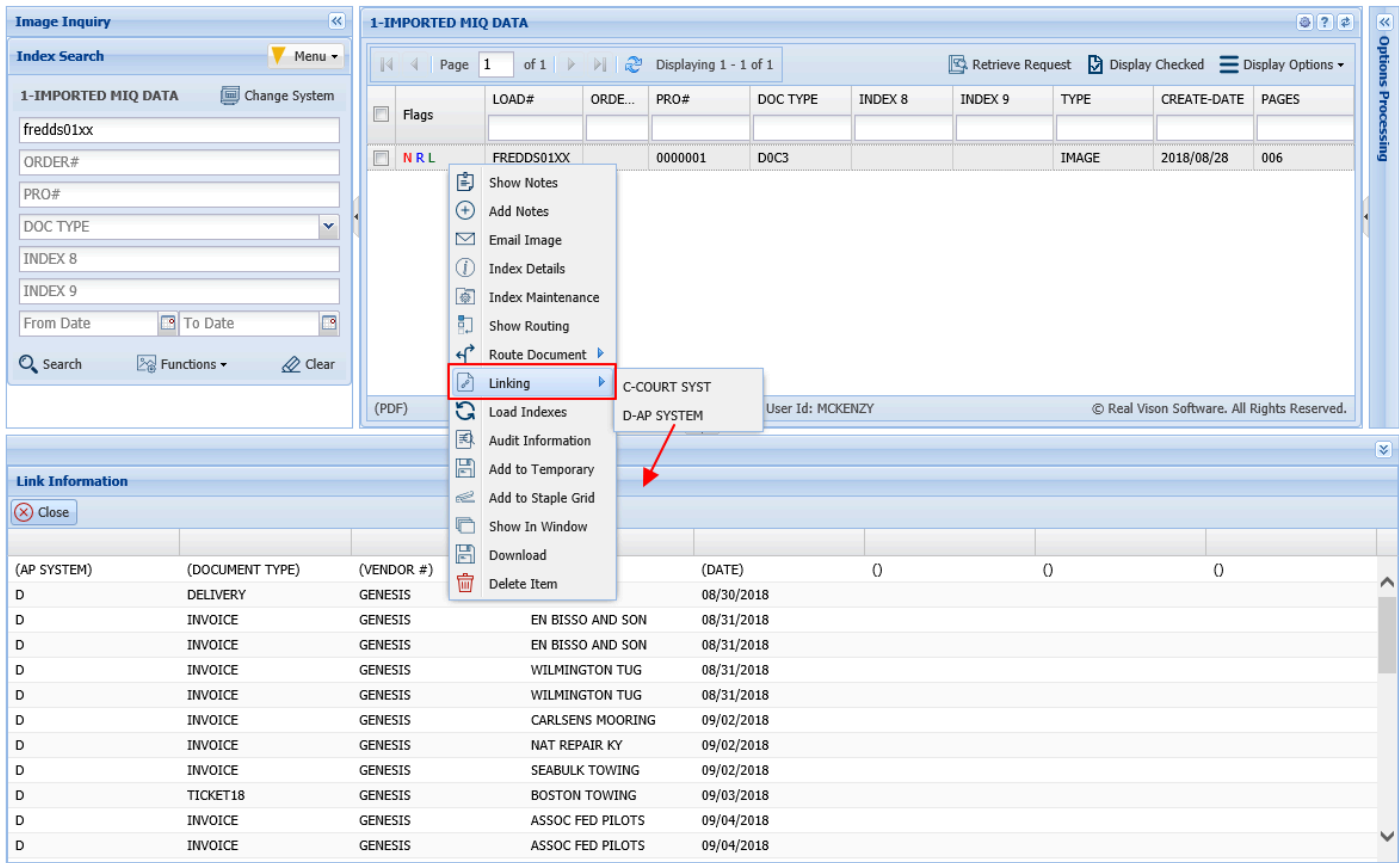
- Double-click any item in the list to view the document.

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

8.17. Notes

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

Right-Clicking to Add Notes

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.

Right-click or double-click a record to access Add Notes and Show Notes.

When Check Out Documents is clicked, the user will get a message that the document is checked out and an entry labeled *CHECKED OUT will be added to the Notes Grid.

Once the user is done adding notes, the entry can be deleted or closed by right-clicking the line item.

Once a Note is Added:

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

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

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

Mouse over the 'N' for a quick view of the notes.

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.

Notes can be exported to an excel spreadsheet using the **Notes To Excel** button.
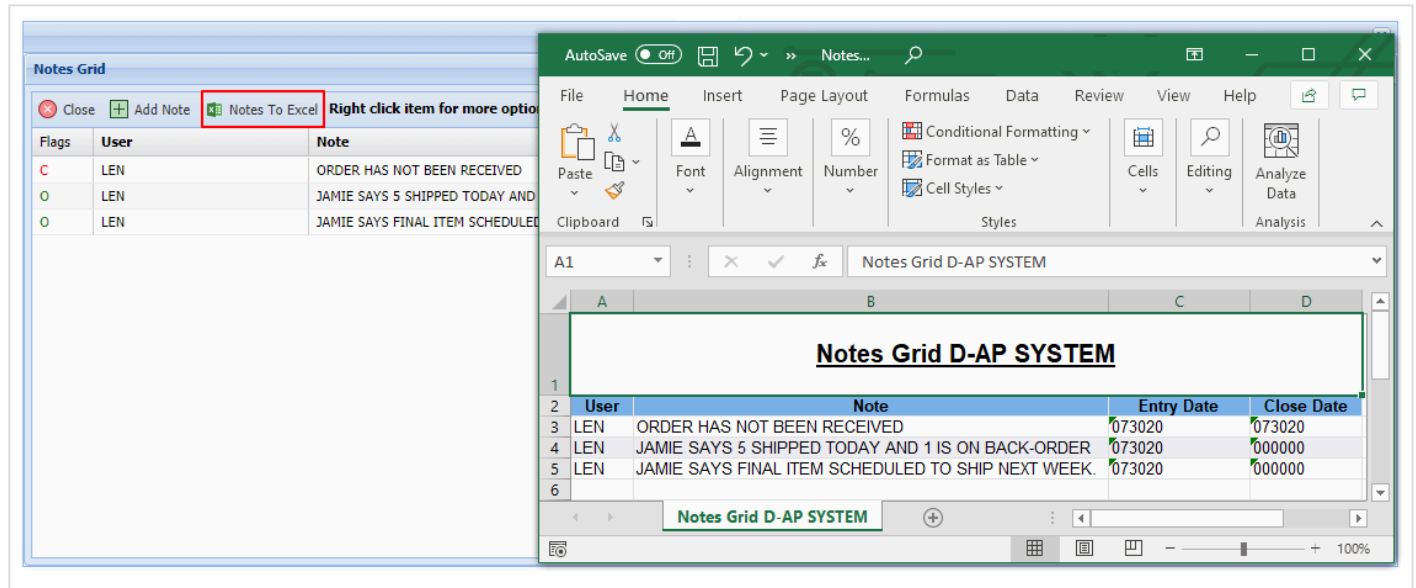
8.18. OCR
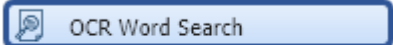
RVI 9.0 offers free Optical Character Recognition (OCR) within the RVI PC Viewer version 9.0.85 or newer. The current OneLook browser interface allows customers to search existing OCR'd documents. For new documents that need to be OCR'd, the OCR process will require the IBMi green screen and the V9 RVI 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.

2. Select the [OCR Word Search] button.

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 System Distribution Directory

PC Screen Scrape Setup:

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

```
                    REAL VISION IMAGE MENU



    1. Image Inquiry.      6. Image Management Menu.    11. Security/Internet Menu.

    2. Scanning Menu.      7. Optical Menu.             12. Screen Scrape Menu.

    3. Spool File Menu.    8. Maintenance Menu.         13. Import External Documents.

    4. Color Menu.         9. Document Tab Menu.        14. System Operator Menu.

    5. Fax/E-Mail Menu.   10. OCR Menu.                 15. Customer Specific Menu.




      F3 =Exit              Help Available                        90 =Signoff
    Selection or command
    ===> 12_
   _____

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

6. Option 1 Maintain Screen Scrape Profiles (Manual)

REAL VISION SCREEN SCRAPE

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



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


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

7. F6 = Add New PC Profile

```
Screen Scrape Selection Screen                (c)Copyright RVI 1992, 1999
                                                      SCR004FM/FATLSTCT
Position To: _____
P =PC Point & Shoot Maintenance
X =Select
X Profile     Image System           Unique Screen Identifier_____
_ COURT400    C-COURT SYSTEM          01 037 CIVIL SUIT INQUIRY
_ DEANTEST    1-IMPORTED MIQ DATA     01 001 Hopewell City
_ DYNAMICS    9-AP DYNAMICSAX         01 001 DYNAMICS
_ FRESCHEB    B-BANKING DDA SYSTEM    02 045 PT_WINV
_ HRWEB       U-HR WORKFLOW SYSTEM    04 017 Human Resources Applicationx
_ HR400       U-HR WORKFLOW SYSTEM    03 028 Employee Inquiry
_ INSURANCEN  I-INSURANCE SYSTEM      05 002  Demo Insurance
_ INSURWEB    I-INSURANCE SYSTEM      04 014 Insurance Application
_ INSUR400    I-INSURANCE SYSTEM      02 003 Demo Insurance
_ INSWEB      I-INSURANCE SYSTEM      09 006 Insurance Application
_ JDEMESS     7-DEMO SYSTEM FOR JDE   01 001 JDEMESS
_ MEDICALWEB  H-MEDICAL SYSTEM        04 014 Medical Application
_ MEDICAL400  H-MEDICAL SYSTEM        03 028 ENCOUNTER HISTORY              +

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

MA    D
```

8. Specify a Screen Scrape Profile Name

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


            This Program Allows You To Enter And Update Screen Profiles


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




               Screen Scrape Profile Name: ACC_____






     F3 =Exit                                            Enter =Continue
```

9. Select an Image System Code

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

X    System      Description

_      S         ACCUFUND PURCHASE ORDERS
_      T         TRANSPORTATION SYSTEM
_      U         HR WORKFLOW SYSTEM
_      V         NET DATA DEMO IMAGES
_      W         DEMO WORK SYSTEM
_      X         FULL TEXT SEARCH DEMO
_      Y         FIDELITY BANK SAMPLE DATA
X      Z         COURT DOCUMENTS AND EXHIBITS
_      0         ACCUFUND CASH RECEIPT
_      1         IMPORTED MIQ DATA
_      2         ACCUF ACTIVITY/JOURNAL
_      3         ADMISSION IMAGES
_      4         ACCUFUND GRANTS                                        +


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

10. F3 to exit the Screen Scrape Profile Maintenance Screen

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

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

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

```
Screen Scrape Selection Screen                   (c)Copyright RVI 1992, 1999
                                                     SCR004FM/FATLSTCT
      Position To: _____
      P =PC Point & Shoot Maintenance
      X =Select
      X  Profile      Image System          Unique Screen Identifier
      P  ACC          Z-COURT DOCUMENTS AND  11 001 Alexandria County Court
      _  ACCTPAYFT    A-AP WORKFLOW SYSTEM   01 001 ACCTPAYFT
      _  ACCUFAJE     2-ACCUF ACTIVITY/JOURN 01 001 ACCUFAJE
      _  ACCUFAPINV   O-ACCUFUND ACCOUNTS PA 01 001 ACCUFAPINV
      _  ACCUFARINV   P-ACCUFUND A/R SYSTEM  01 001 ACCUFARINV
      _  ACCUFCR      0-ACCUFUND CASH RECEIP 01 001 ACCUFCR
      _  ACCUFGRANT   4-ACCUFUND GRANTS      01 001 ACCUFGRANT
      _  ACCUFGRITM   5-ACCUFUND GRANT ITEMS 01 001 ACCUFGRITM
      _  ACCUFPOINV   S-ACCUFUND PURCHASE OR 01 001 ACCUFPOINV
      _  ACCUFRQINV   Q-ACCUFUND REQUISITION 01 001 ACCUFRQINV
      _  ACCUFUND     R-SIGNATURE DOCUMENT S 12 001 General F
      _  ACCUFUNDPC   I-INSURANCE SYSTEM     01 001 ACCUFUNDPC
      _  AP SYSTEM    D-AP SYSTEM            03 024 Inquiry by Invoice Number    +

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

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

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


Opt   File Name    Date Created  First Line In File
 _    P150750.TXT  2018/09/20
 _    P145740.TXT  2018/09/20
 _    P142849.TXT  2018/09/20
 _    P140704.TXT  2018/09/20
 _    P114325.TXT  2018/09/20
 _    P114119.TXT  2018/09/20
 _    P112141.TXT  2018/09/20
 _    P110700.TXT  2018/09/20
 _    P110245.TXT  2018/09/20
 _    P110113.TXT  2018/09/20
 _    P104931.TXT  2018/09/20
 _    MATTHEW.TXT  2018/09/20   091818_OneLook_IBMiCloud_Fix  -  Compatibilit
 X    MONTY.TXT    2018/09/20   Real Vision Software, 8.0 - Internet Explorer
 ▬    0106500.TXT  2018/09/13   30
 _    0106501.TXT  2018/09/13   ACCUFAPINV
                                                                  More...


    Page Up/Down =More Files        ENTER =Continue              F12 =Cancel
```

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

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


          This Program Allows You To Enter And Update Screen Profiles


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




              Screen Scrape Profile Name: ACC_____






    F3 =Exit                                             Enter =Continue
```

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

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


         _____

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

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

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


          Index Number 1-99:    00 0 = Screen Unique Identifier

          Starting Position:      6
          Ending Position:       22
          Length:                17
          Line:                   9


                                                    Enter =Continue
```

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

PC Screen Scrape Test:

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

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

PC Screen Scrape Example:
For the purpose of our example, assume that we set up the pc screen scrape profile to search for the value occurring after "Vendor Number:".
First make the PC application window the active window and press the hot-key (ctrl-shift-F5).

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

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

8.20. 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

4. Select a existing user by placing an **X** next to the record <u>OR</u> create a new record using F10 = Add A Record

5. From the Maintain PC Workstation Configuration Screen, set Image Viewer to **O** or **P**

```
Maintain PC Workstation Configuration Screen      (c)Copyright RVI 1992, 1999
                    X=Select A Mapping Type                     CRTRVIFM/CNT100D5
  _  D,Y=Data Queue    _  S,N=Folders         _  1=FTP-TCPADDX Value
  _  F=FTP             _  U=UNC               _  2=UNC-SYSTEMX Value
  _  H=HTTP            _  T=TCP-UNC           _  3=HTTP-HTTPX Value
       X=Select An Image Viewer (For further info, tab to entry field, then F1)
     Yellow Image Viewer types are OneLook-specific
  _  Y=Use Windows Associated Viewer             _  N=Use RVI PC Viewer
  _  V=Convert To PDF, Use RVI PC Viewer
  _  H=Convert To PDF, Hyperlink To Browser
  _  I=Index List in Browser, Display In Browser
  _  J=Index List in Browser, Display In RVI PC Viewer
  _  K=Index List in RVI PC Viewer, Display In RVI PC Viewer
  _  R=Index List in Green Screen, View in RVI PC Viewer, No HLLAPI
  _  L=No HLLAPI, Display in RVI PC Viewer
  _  M=Index List in RVI PC Viewer, Display in RVI PC Viewer, No HLLAPI
  _  O=Index List in Green Screen, View in OneLook, Using Polling
  _  P=Index List in OneLook, View in OneLook, Using Polling
  _  S=DataQue to Socket From Green Screen, No HLLAPI
  _  E=DataQue to Socket Using OneLook, No Polling
  _  F=DataQue to Socket Using Onelook, No Polling, Scanning To Viewer
  _  G=HLLAPI Support in Onelook, No Polling
 F1 =Additional Image Viewer Description                        Enter =Continue
```

6. Press Enter to save then F3 to exit

7. Return to the RVI Image Menu using **GO IMAGE**.

8. Select **Option 1** Image Inquiry and specify an Image System ID Code.

9. Type the index values to be searched.

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

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

One Look Configuration:
For Polling to run, the Image Systems <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.

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 MVC013 or MVC013D from your interface will initiate the scan process and pass the specified index values using polling between OneLook and your interface.

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

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

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


                       COURT DOCUMENTS AND EXHIBITS


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




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

MA    B                                                              10/041
```

8.21. Previous 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.

1. Double click the record.
2. Select **Previous Versions** button.
3. Once the View Previous Versions grid opens:

   • Enable **View Original Version** to display the original document.

OR

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

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

8.22. Print

When viewing in One Look, documents can be printed directly from the PDF frame.
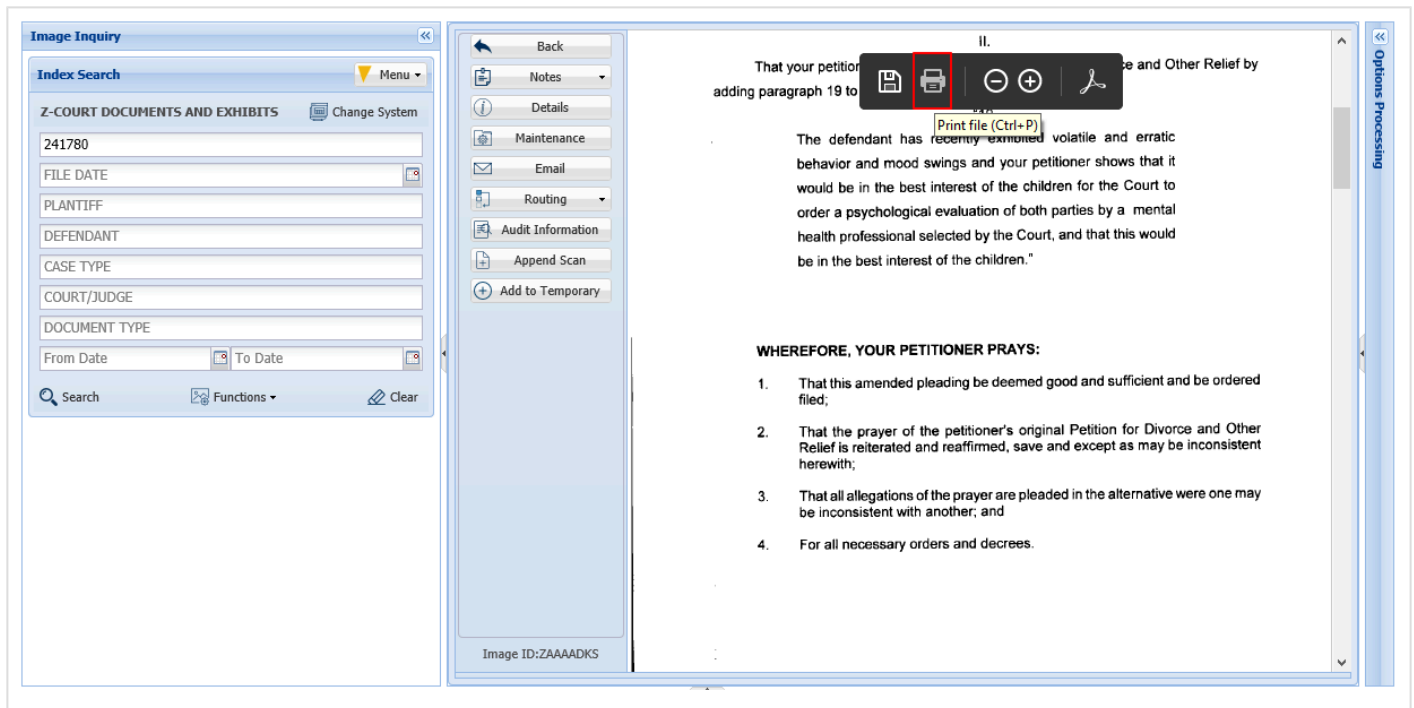
When viewing in RVI.EXE, documents can be printed using the Print menu.
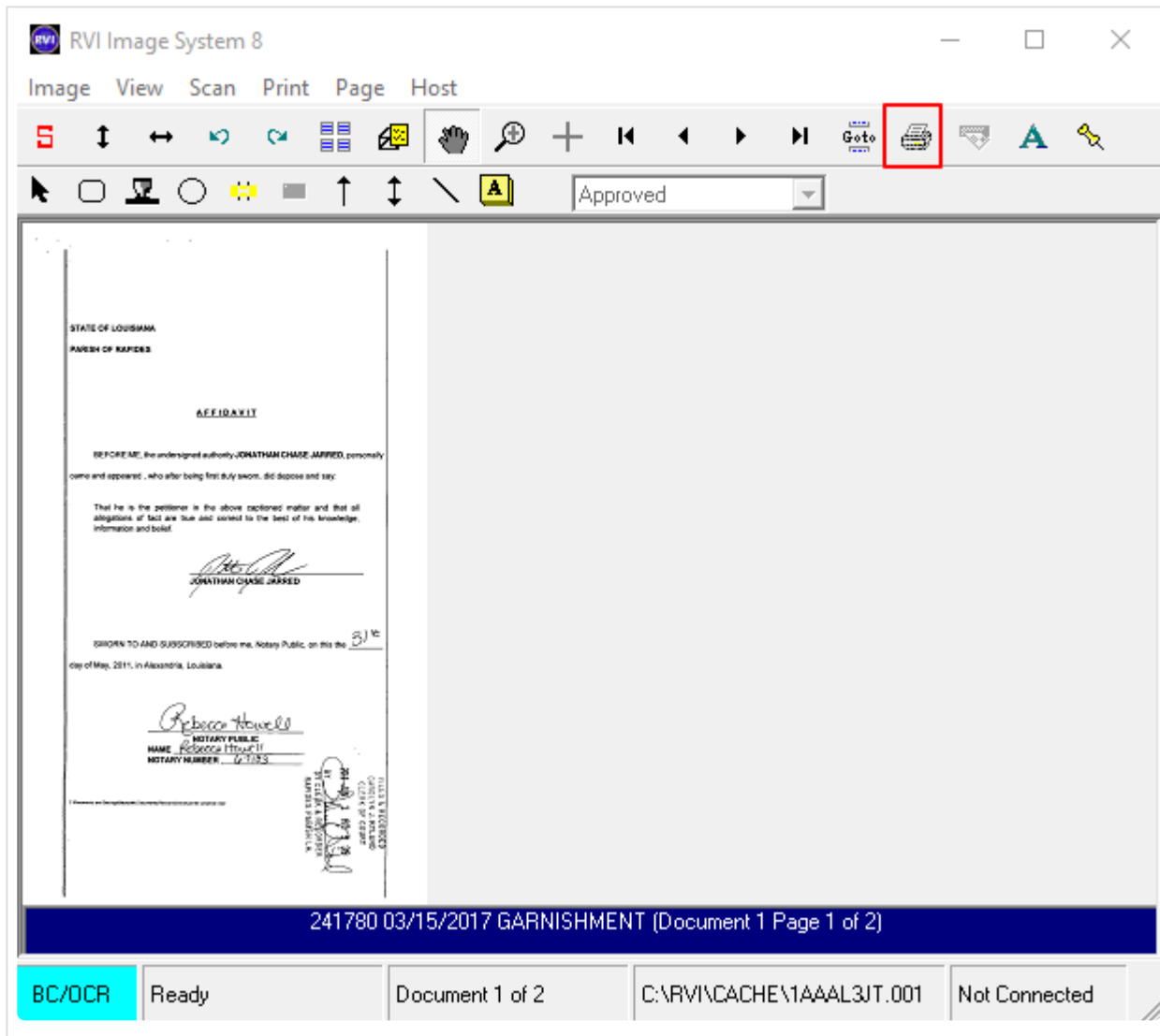
8.23. Print To RVI

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

1. Open the RVI PC viewer (RVI.EXE) 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 Support Downloads.
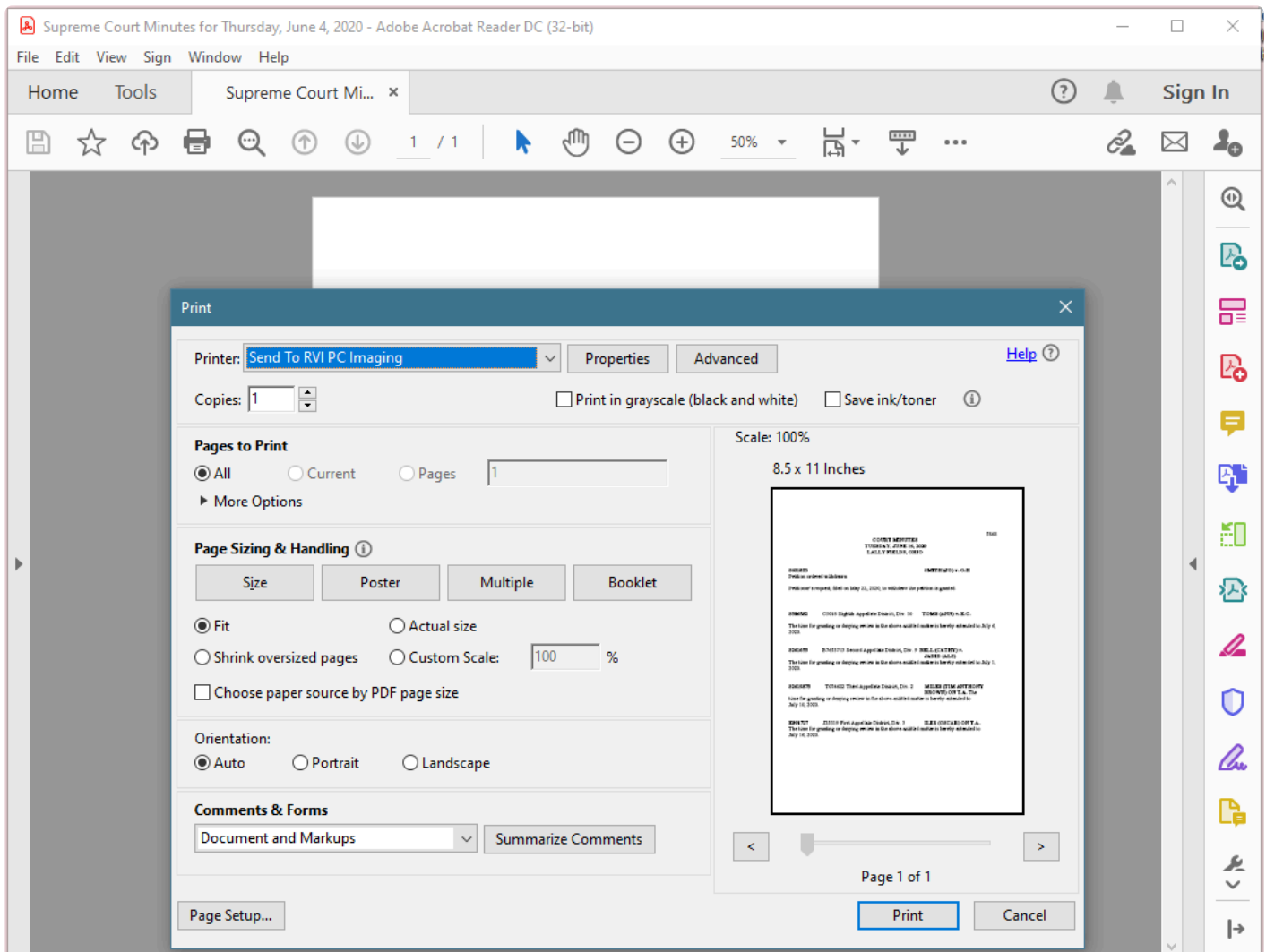
Based on the configuration, the user may get a RVI Index Values pop up allowing them to index the document at print time.

RVI Index Values

SYS.
CODE Z - COURT DOCUMENTS AND EXHIBITS

CASE NUMBER
1202712

FILE DT
02172021

PLANTIFF
E MAYS

DEFENDANT
W REED

CASE TYPE
C

COURT/JUDGE
P/J RILES

DOCUMENT TYPE
STATEMENT

OK

Cancel

☐ 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*

RVI Image System 9

Image   Preferences

General
Screen Scrape
Index Options
E-Mail
External Viewers
Disk Caching
Signature Pad
Scanner Support
Auto Import Support
FTP Support
Internet Support
EHLLAPI

☐ Enter key moves to next image

☑ Enter key moves to next known index

☑ Auto focus index text when selected

☑ Download system profile information at startup (once per day)

☐ Enforce index limits

☐ Open Index Frame on Drag/Drop, Send To RVI, and Print To RVI

☑ Restrict Values List BC/OCR

☑ Index Print to RVI documents at time of print

BC/OCR

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.
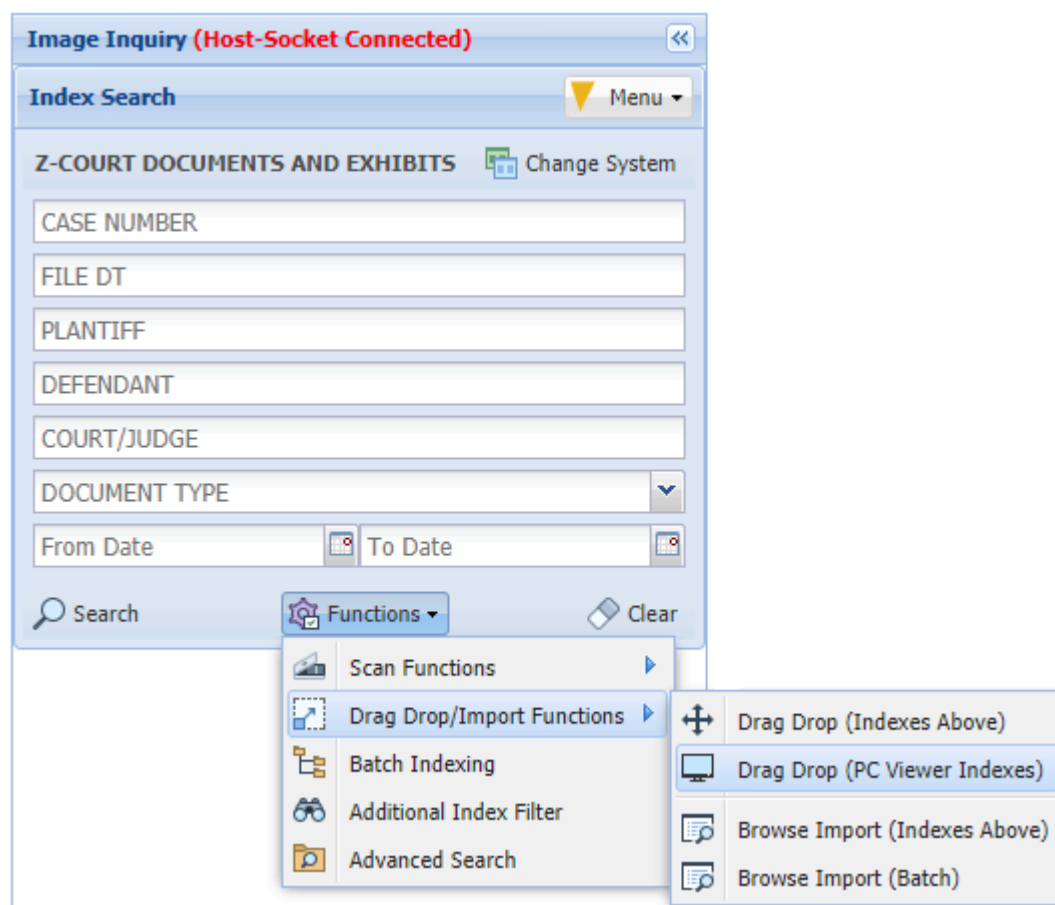
The newly imported will now be available for inquiry.
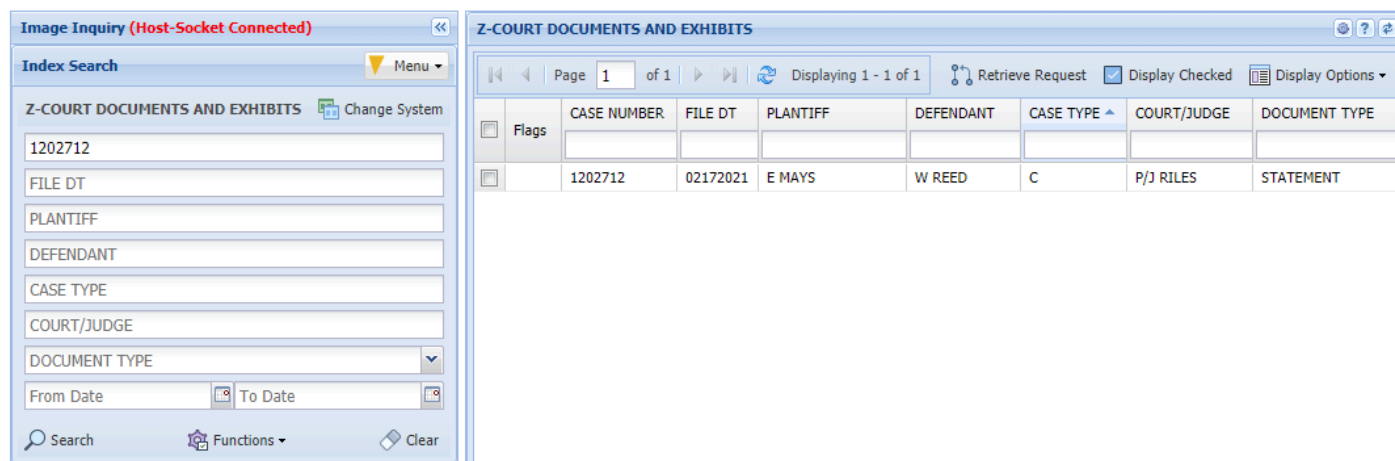
8.24. Quick View

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**.

Z-COURT DOCUMENTS AND EXHIBITS

◄◄ ◄	Page	1	of 1	►	►►	↻	Displaying 1 - 161 of 161

	Flags	CASE NUMBER ▼	FILE DATE	PLAINTIFF	D
☐					
☐		01231976		O LANE	P
☐		012356			
☐		012376			
☐		012376			
☐		012376			
☐		012376	P		
☐		012376	P1		
☐		012376	P2		
☐		012376	P3		
☐		020120			
☐		020121			
☐		020121			
☐		021521	021521		
☐		021521	021521		
☐		021521	NONOTES		
☐		021521	NOTES		
☐	N	021521	021521		
☐	N S	02182021	02182021		
☐		02182021	02182021		
☐		02222021			
☐		02232021	02232021		
☐		02232021	02232021		
☐		02232021	02232021		
☐		02232021	02232021		
☐		02232021	02232021		
☐	N	02232021	02232021		
☐		030221	03022021		
☐		030221	03022021		

Context menu:
- ↑ Sort Ascending
- ↓ Sort Descending
- ▦ Columns ▶
- Group by this field
- ☐ Show in groups

Columns submenu:
- ☐ SYSTRAN
- ☑ CASE NUMBER
- ☑ FILE DATE
- ☑ PLAINTIFF
- ☑ DEFENDANT
- ☑ CASE TYPE
- ☑ COURT/JUDGE
- ☑ DOCUMENT TYPE
- ☐ TYPE
- ☐ PATH
- ☐ FILE
- ☐ CREATE-DATE
- ☐ VIEW-DATE
- ☐ PAGES
- ☐ DELETE
- ☐ NOTES
- ☐ SIGNATURES
- ☐ ROUTE
- ☐ WORKBASKET USER
- ☐ CREATED BY USER
- ☐ CHECKED OUT
- ☐ RAW DOCUMENT TYPE
- ☑ 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.
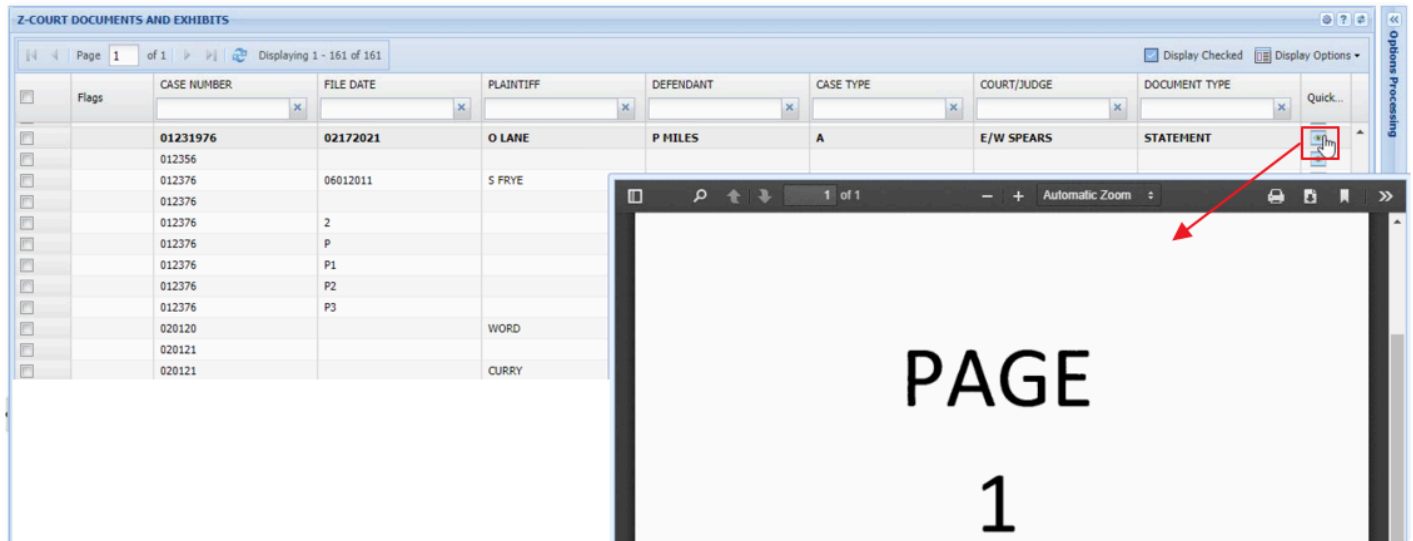
> ✱ For third party file types that are not inherently handled via the browser display, the system will automatically download the file for the user to open.

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.

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

1. Display an image in One Look.

2. Select [Add Redaction] to display the image in the RVI PC Viewer.
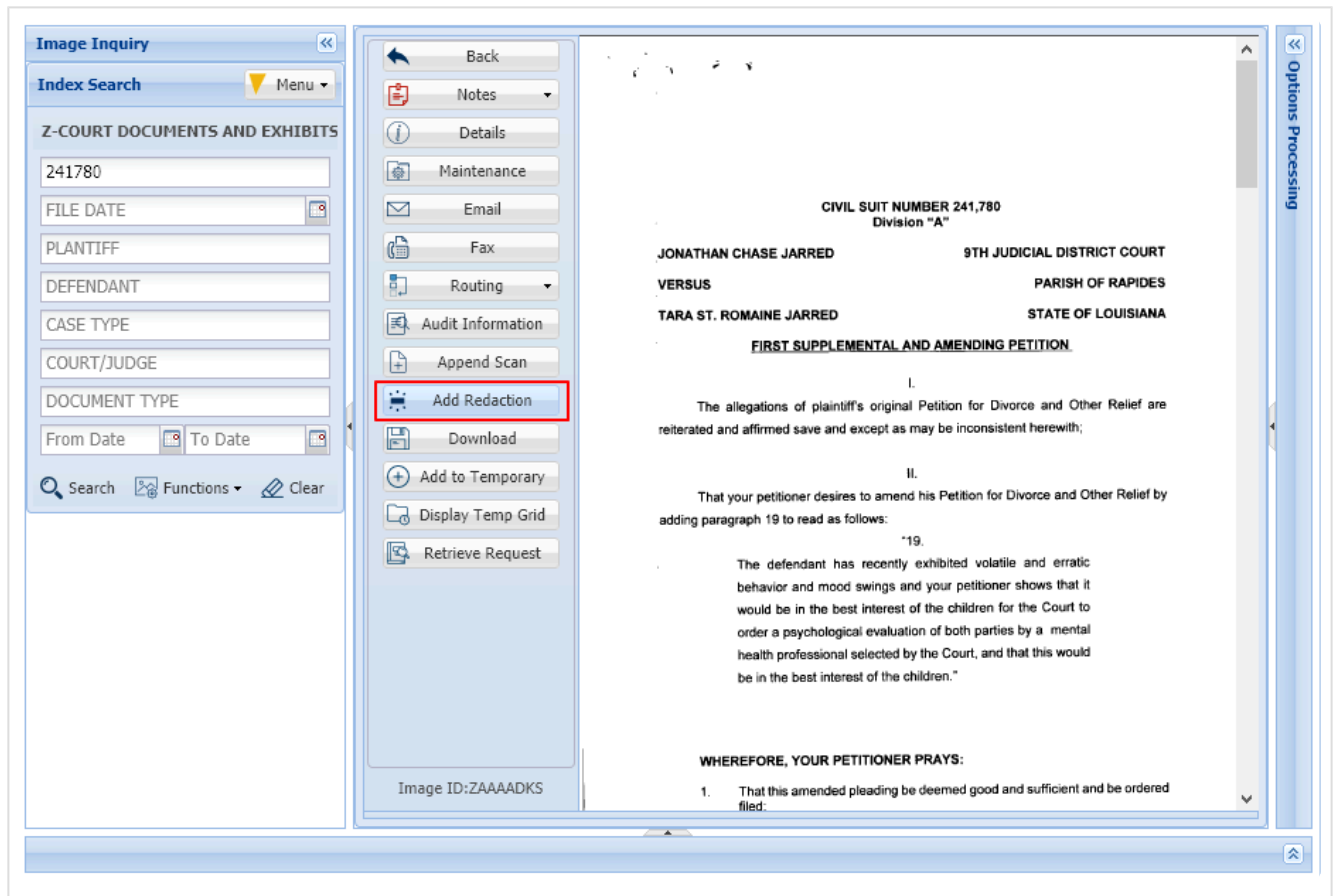
3. Click the redaction button in the RVI PC Viewer

4. Draw your redaction box around the area(s) you want to redact. (*See **Redaction Adjustment** section below for details on moving or deleting redaction.*)

5. Click Accept when you are finished.
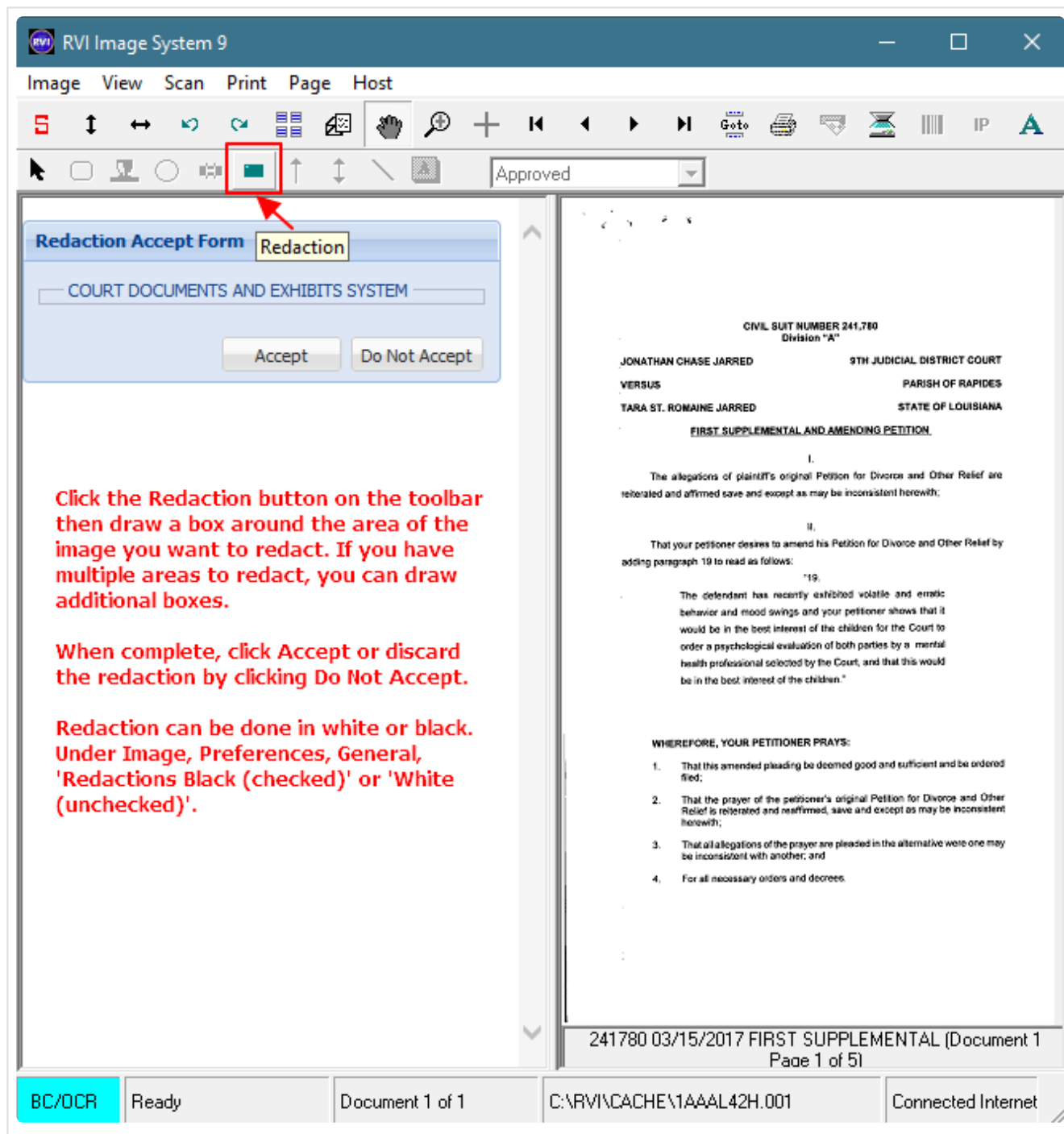
> ⚠ Wait until the viewer completely clears the image to ensure the redaction process is complete.

Redaction Adjustment:

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

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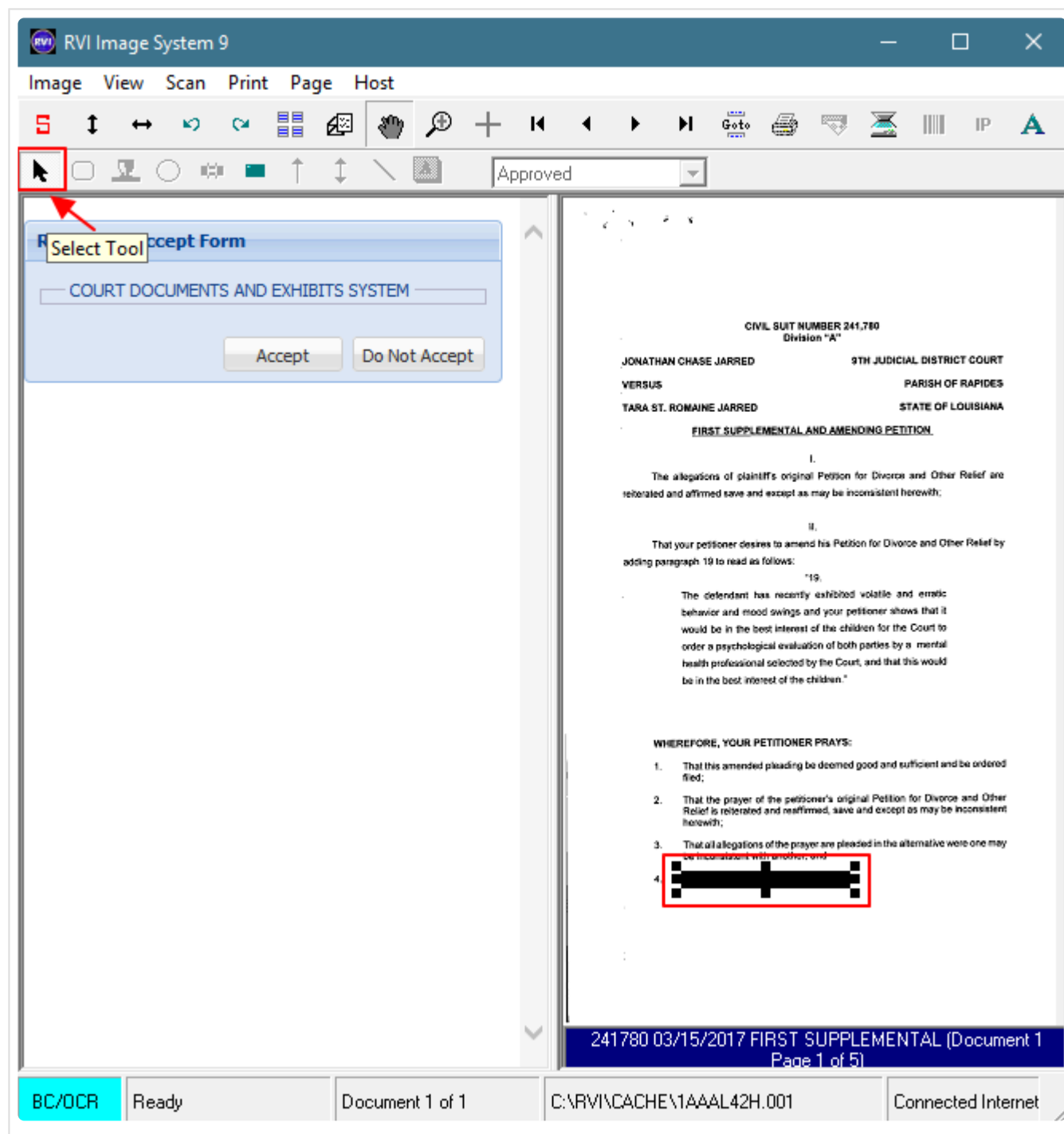
8.26. Routing

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.*)

Once a document is routed:

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

To work with items routed to your workbasket, select Menu, [WorkBasket](#) to access your workbasket.
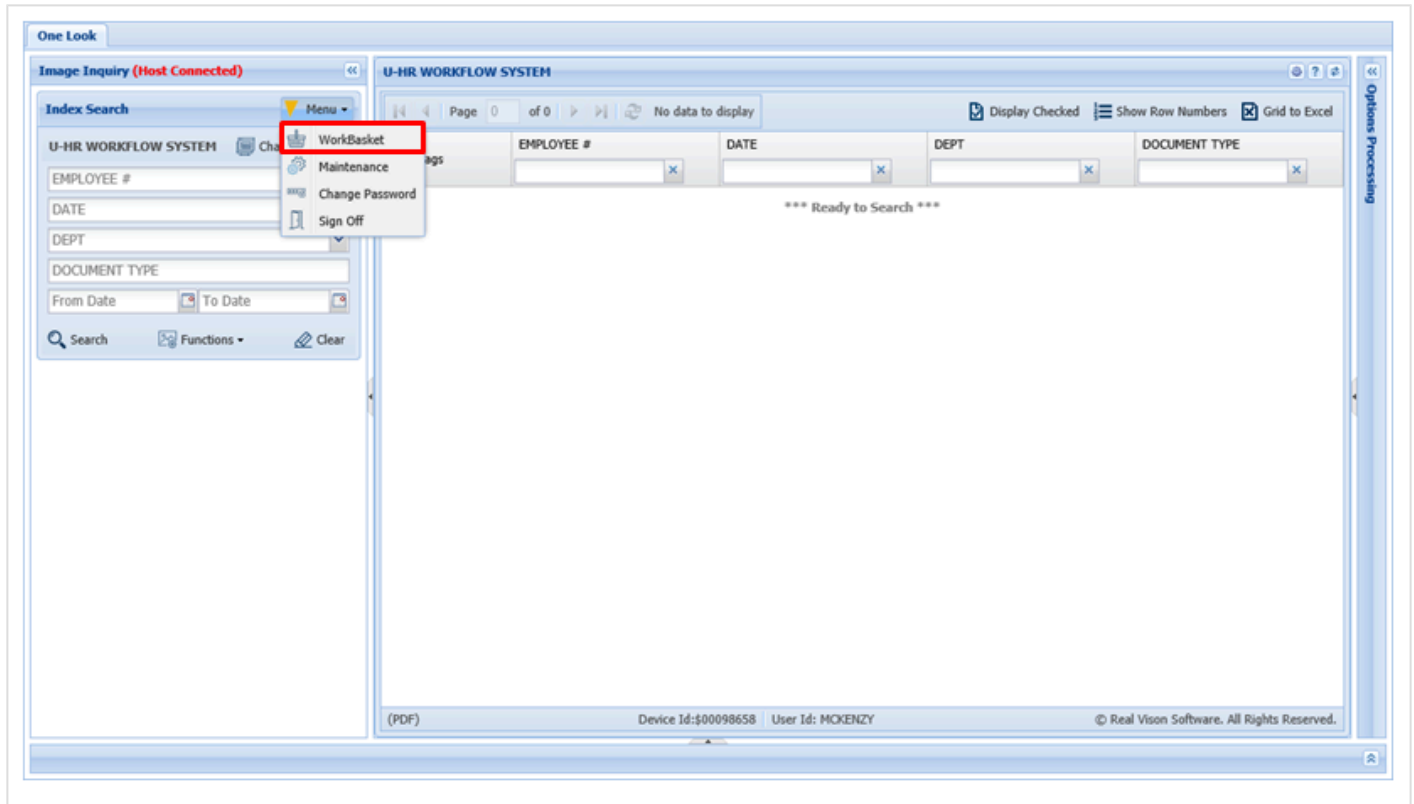
8.27. Scan

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 HERE 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.*

2. Select the [Functions ▼] button.

3. Select the [Scan Functions ▶] button.

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

! One Look requires the **RVI PC Viewer** (*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.
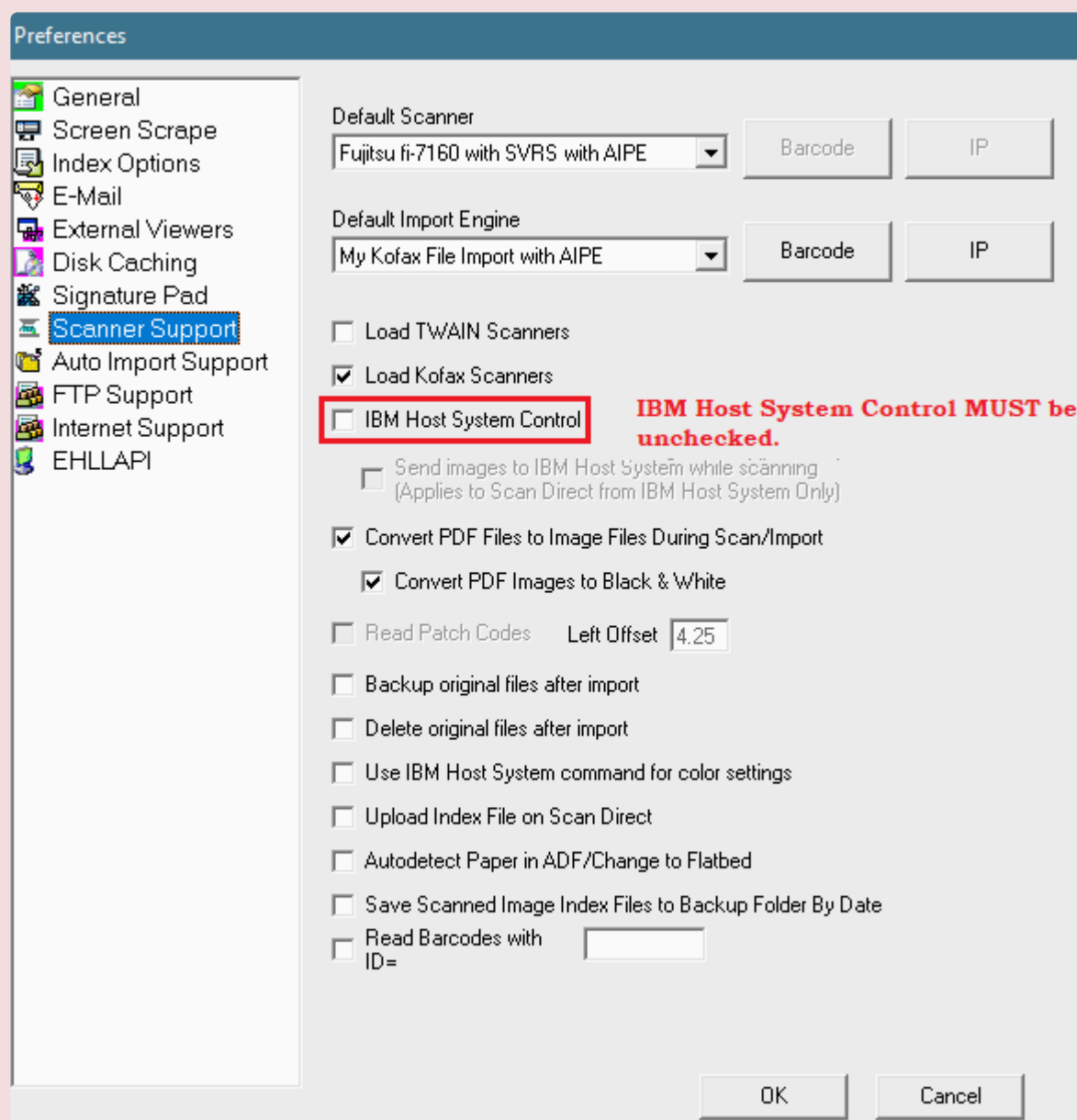
8.27.1. Scan Using Indexes Above (Twain Scanner)

✱ **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 Setup RVI Communications Server for further instructions.
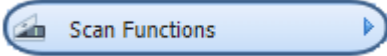
1. Type the desired index values into the index search window. (**You MUST supply at least one index.**)

Image Inquiry (Host-Socket Connected) «

Index Search ▼ Menu ▾

Z-COURT DOCUMENTS AND EXHIBITS 🖳 Change System

010941

01/12/2022

JEAN SMITH

LARRY WILLS

MISC

DIRE/001

MOTION ▾

From Date | To Date

☐ Show Deleted Records

🔍 Search | 🏠 Functions ▾ | ◇ Clear

Scan Functions ▶	🔲 Scan Using Indexes Above(Twain Scanner)
Drag Drop/Import Functions ▶	🔲 Scan Using Indexes Above
Batch Indexing	👤 Scan Using A Profile
Additional Index Filter	⬆ Upload Scanned Documents
Advanced Search	

For Twain Scanning without the RVI PC Viewer, the RVI Communications Server (RVI PC Socket) must be running in the system tray, OneLook must show the socket is connected, and the RVI PC Viewer must be closed (if installed).

If you are running the Host Socket on the IBMi as well as the RVI Communications Server (RVI PC Socket) in the system tray, OneLook will show Host-Socket Connected.

If only the RVI Communications Server (RVI PC Socket) is running, OneLook will show Socket Connected or PC Socket Connected.

2. Select the 🏠 **Functions ▾** button.

3. Select the 📷 **Scan Functions** ▶ button.

4. Choose **Scan Using Indexes Above (Twain Scanner)**.
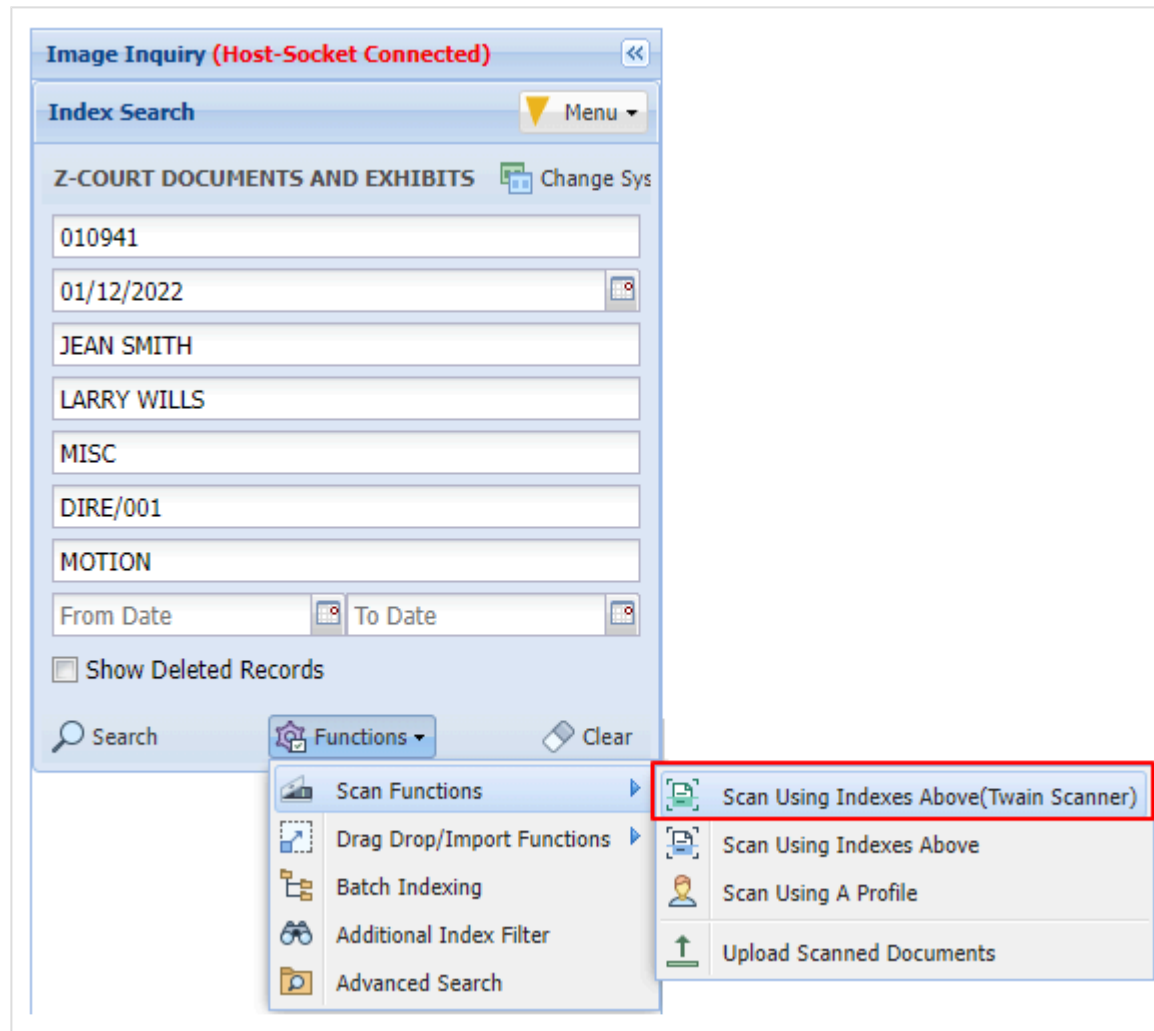
The twain interface (*specific to the make/model of the scanner*) will pop up.
If the twain interface does not automatically pop up, verify the twain device is specified in the RVI Communications Server setup.

Once the scan option is selected from the twain interface, the image will be displayed inside the One Look browser interface.
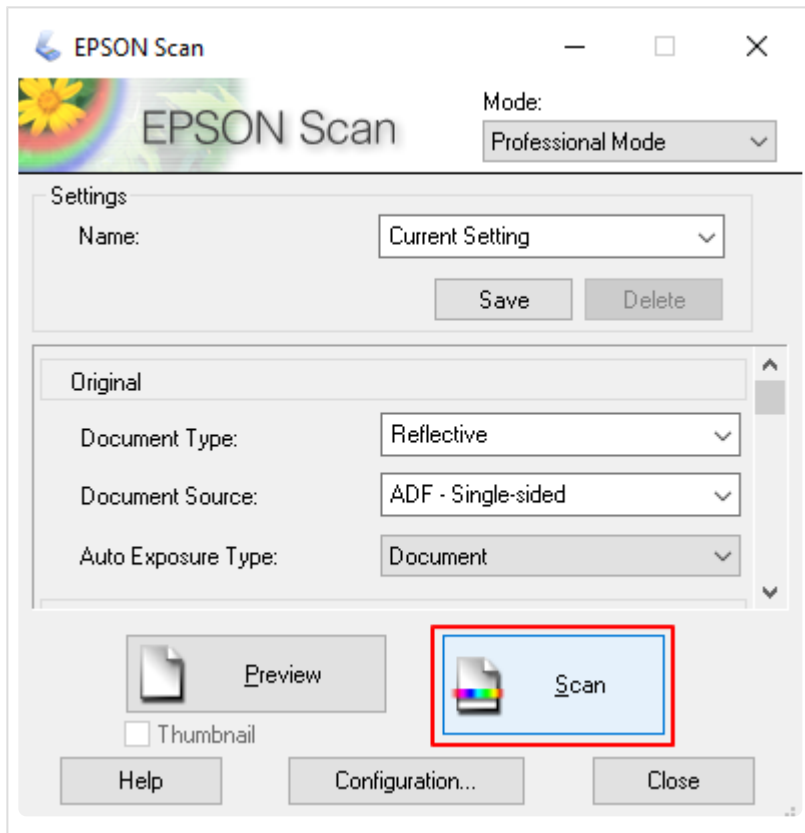
5. Select Accept to save the scan or Cancel to reject the scan.
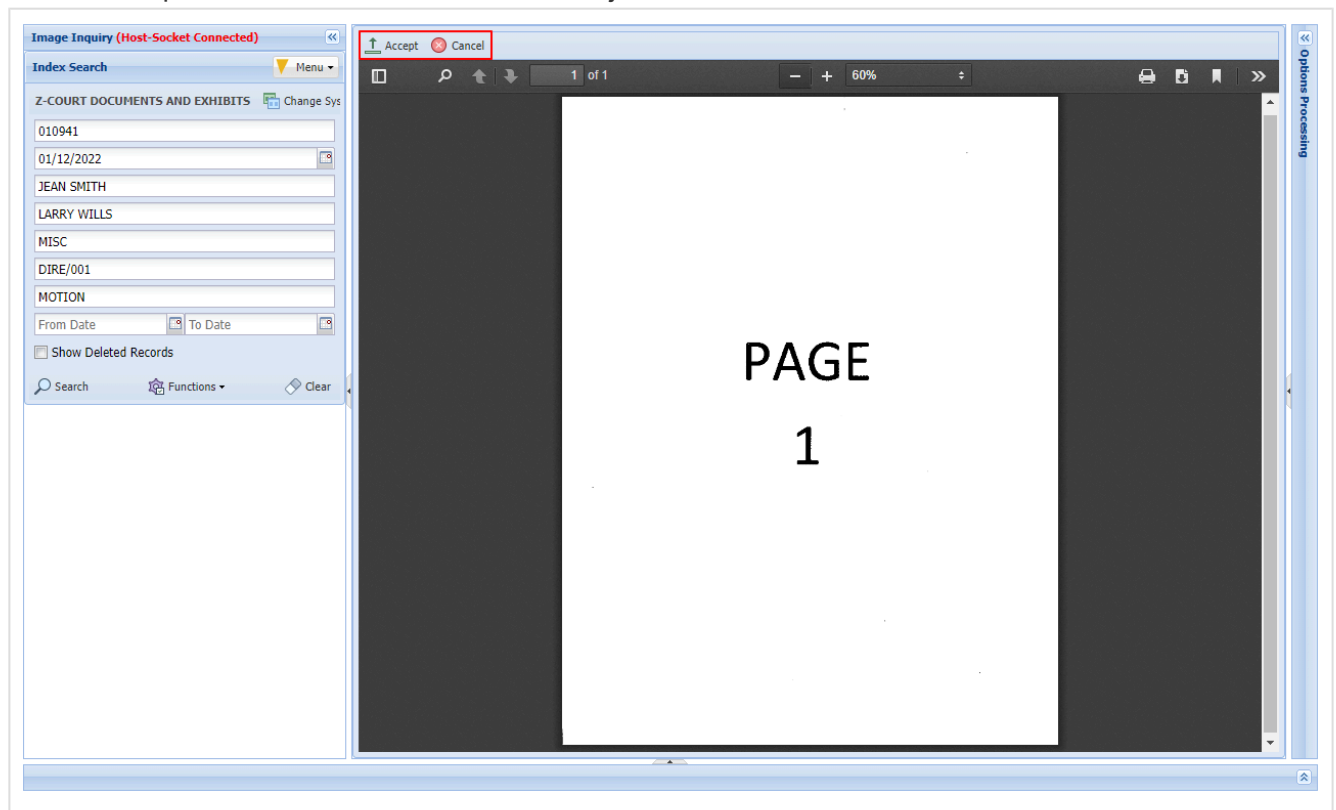
⚠ If you receive the following error, the Twain setup is not being recognized.
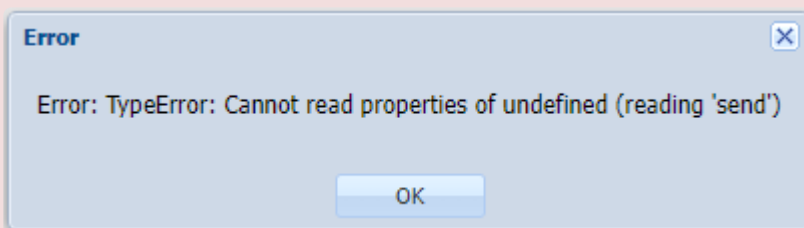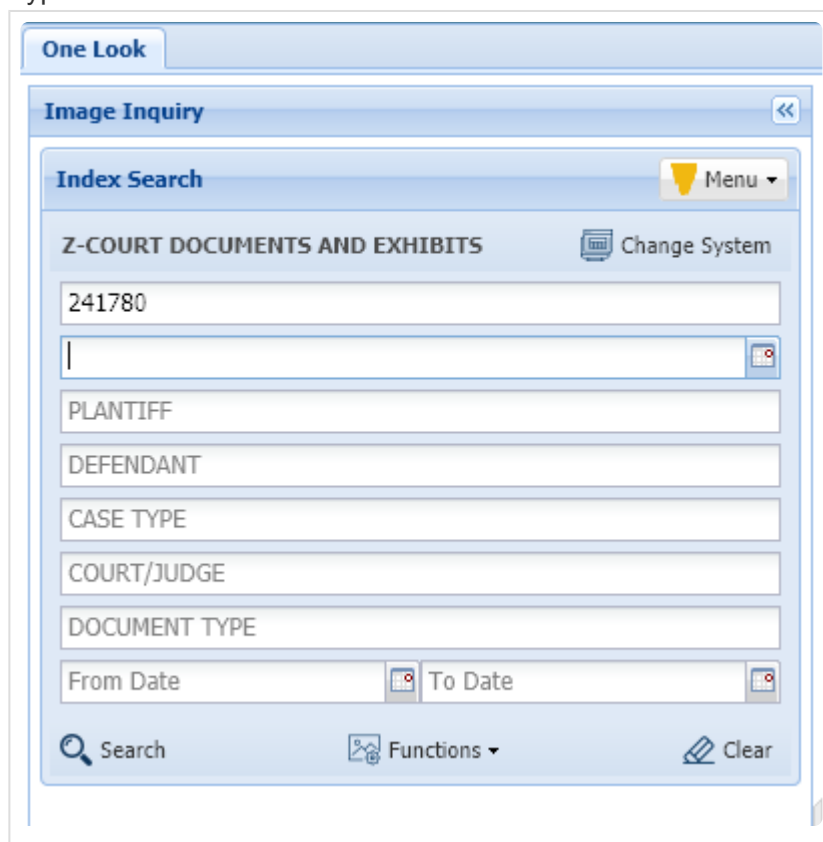
The error is due to one or more of the following:
• Twain Driver is not installed
• RVI Communication Server is not installed/running in the System Tray on the pc.
• A Twain Device is not specified in the RVI Communication Server.

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.

2. Select the **Functions** button.

3. Select the **Scan Functions ▶** button.

4. Choose **Scan Using Indexes Above**.
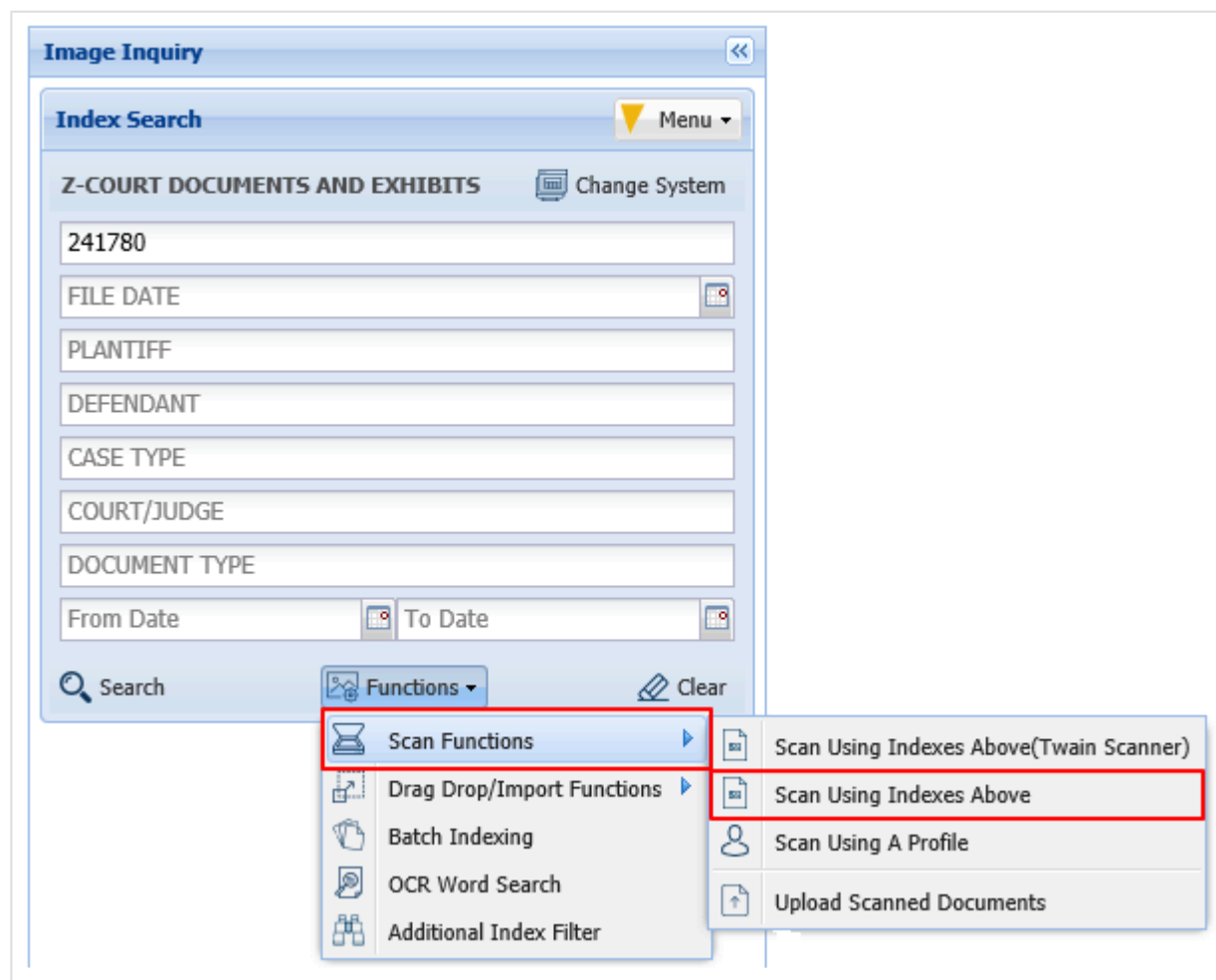
> ❗ The RVI PC viewer must be **open** and **connected** to the scanner.

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 Setup a Scan Station for instructions.

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

1. Select the **Functions ▾** button.

2. Select the [Scan Functions ▶] button.

3. Choose **Scan Using A Profile**.
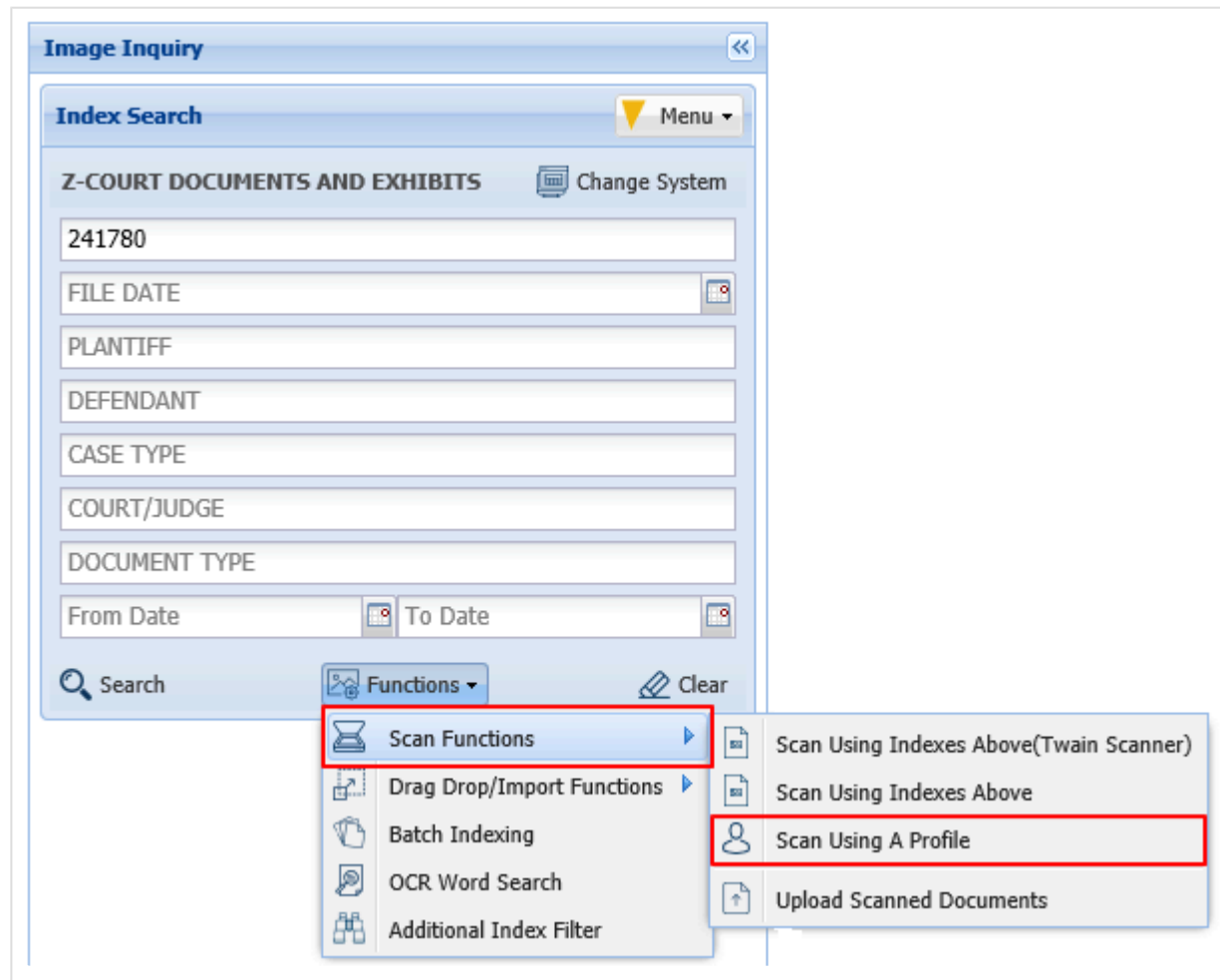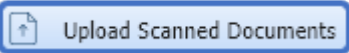
4. Choose a scan profile from the list of available profiles.
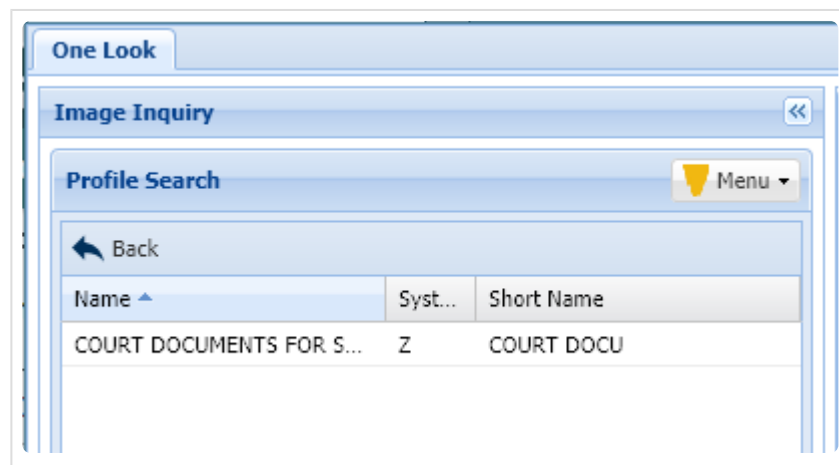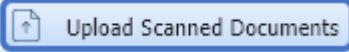
> ❗ The RVI PC viewer must be **open** and **connected** to the scanner.

8.27.4. 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

> ❗ One Look requires the **RVI PC Viewer** for send to rvi.
>
> The RVI PC Viewer must be **Connected: IBM DATA QUEUES** [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.
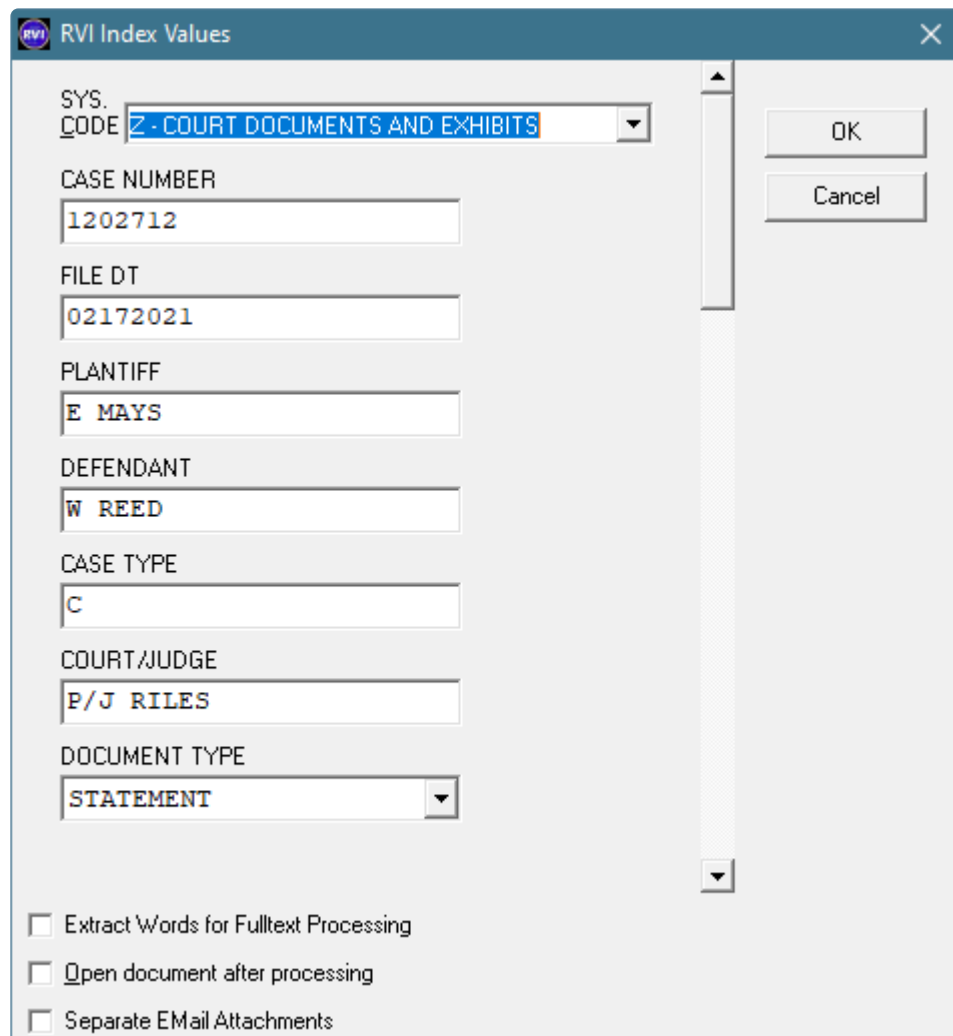
1. Open the RVI PC viewer (<u>RVI.EXE</u>) and One Look browser.

From within a Microsoft Office application:

2. Select **Send To RVI**.

✻ If Send To RVI is not available in your Microsoft application, install the RVI Office Add-In included in the RVI PC Viewer installation.

3. Index the file then click OK.

4. Verify the [BC/OCR] 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.

The newly imported will now be available for inquiry.

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.

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**.

> ✱ If you do not see the **TYPE** column, click the arrow in the top right corner of an existing column. Select **Columns**, *enable* **TYPE**.
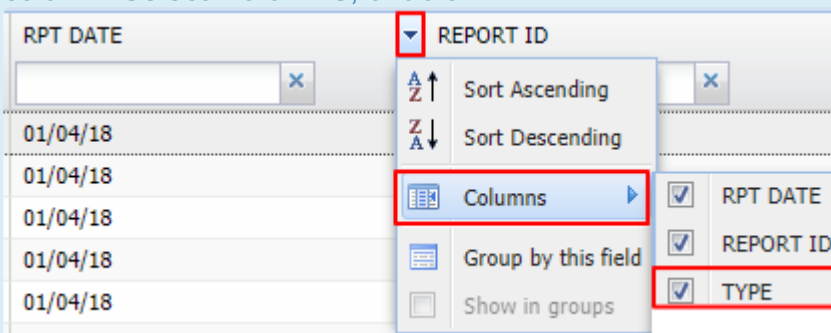
The search criteria can be narrowed down to only show Spool reports (Type = SPOOL) by using the [Additional Index Filter](#) option Reports Image Types.
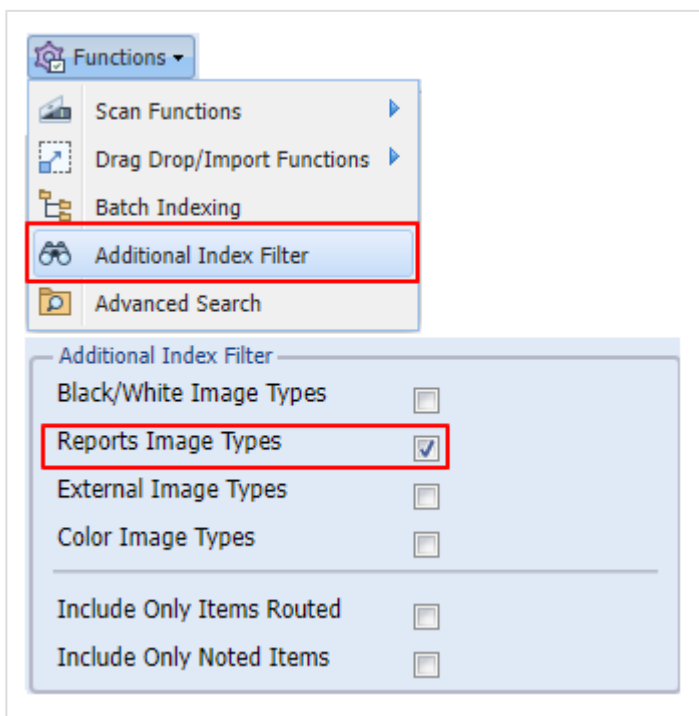
8.30.1. Display
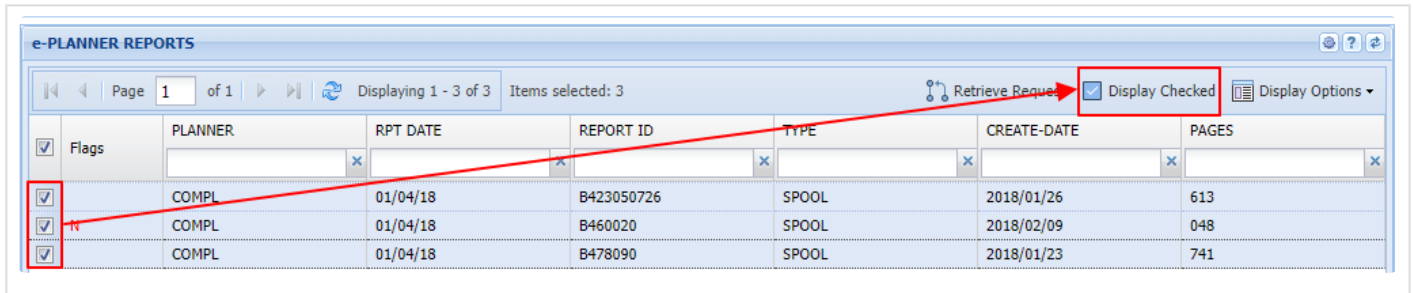
Spool files will be displayed in the right window pane in PDF format.

Example of a Spool file displayed using Google Chrome PDF display.

Example of a Spool file displayed using Microsoft Edge PDF display.

For viewing large spool files, RVI recommends enabling Display AS400 Spool Format.
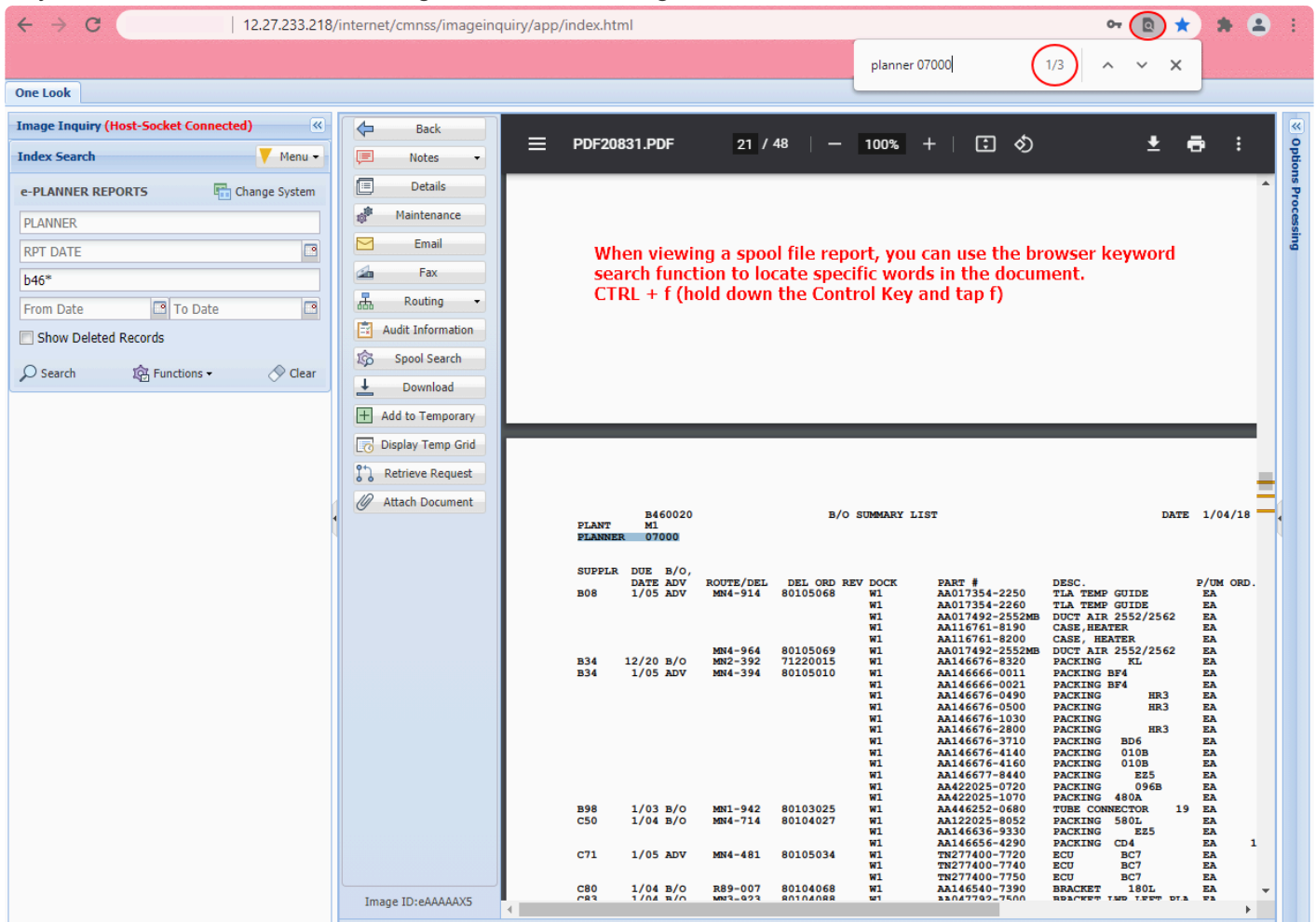
Multiple spool files can be viewed simultaneously by placing a check mark next to the record then click **Display Checked**.

8.30.2. Keyword Search

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

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.
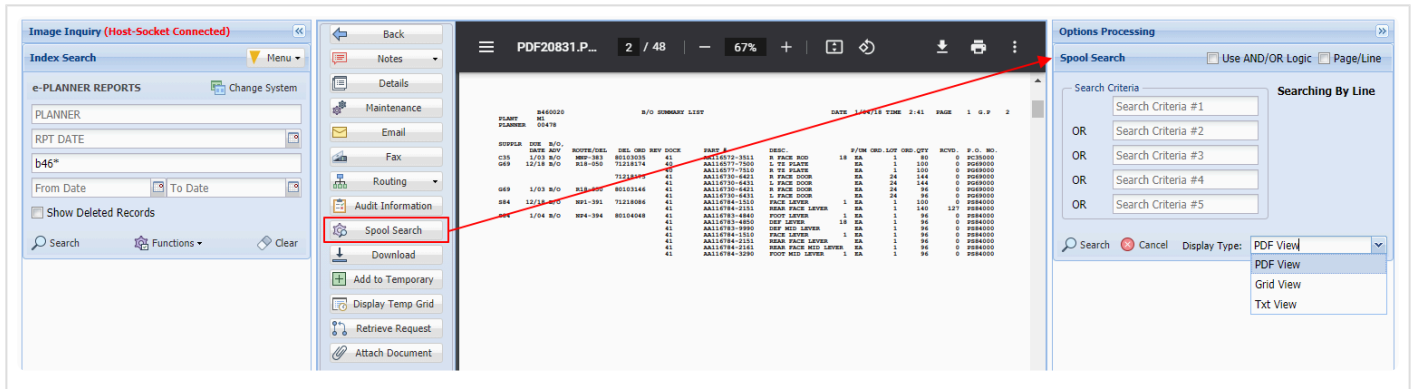
PDF View:

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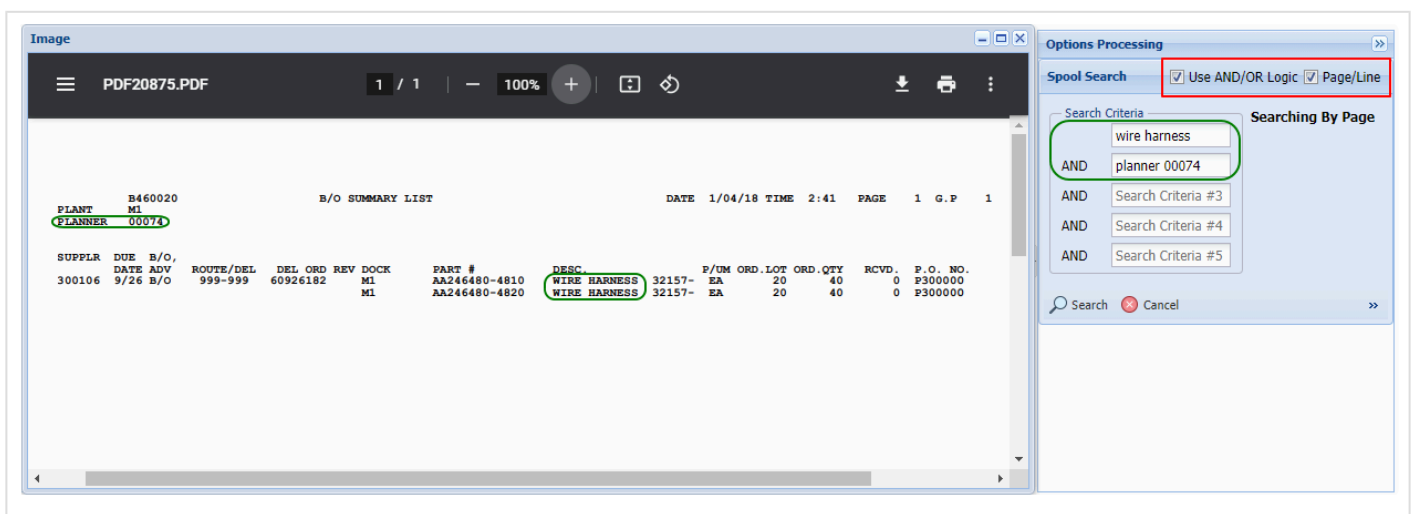
Grid View:

Example: Display Type of **Grid View** using the **OR** logic and **Line** results.
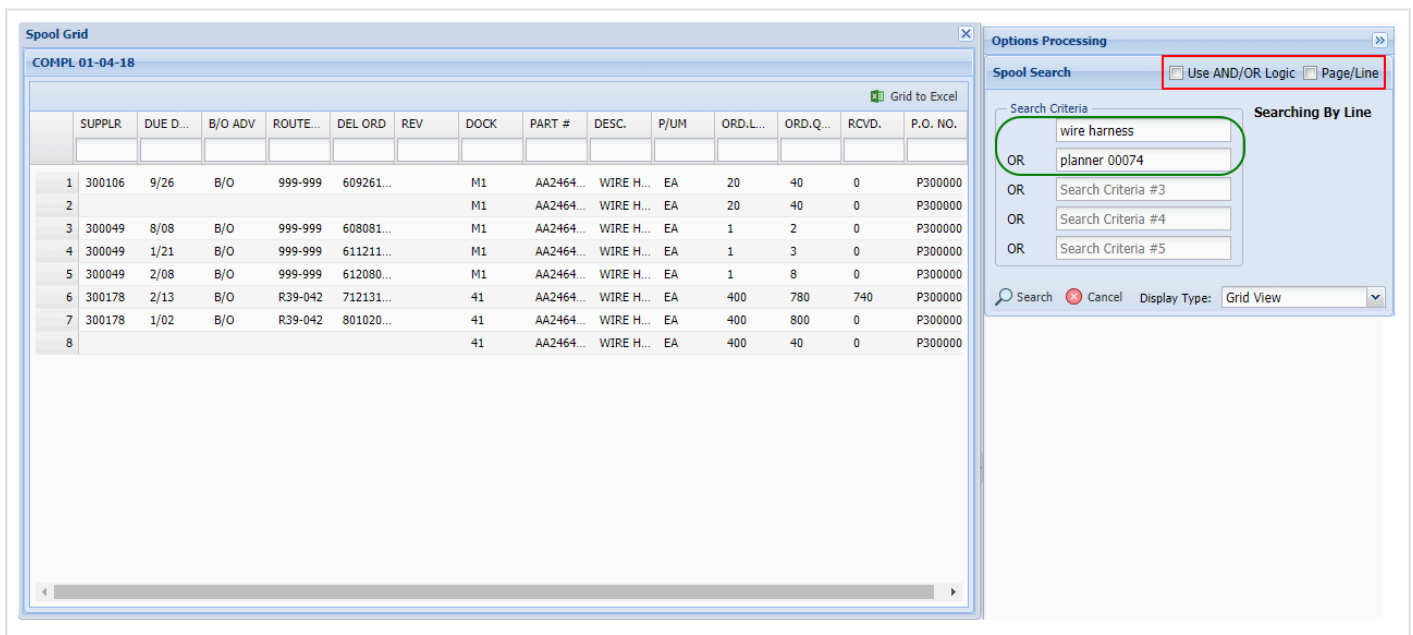
To watch a video on building a grid CLICK HERE.

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: *ANY         Profile: BRANCH

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

 Use lines 006 007 000 as heading lines

 Extract up to 15 columns from the selected lines as follows:
    Str End       Str End       Str End       Str End       Str End
 01 009 015    02 017 037    03 038 065    04 064 072    05 000 000
 06 000 000    07 000 000    08 000 000    09 000 000    10 000 000
 11 000 000    12 000 000    13 000 000    14 000 000    15 000 000

 Optional specifications:
   Include lines if:
   Pos 009 of detail line is EQ/NE NE to the value *BLANKS
     And/Or (AN/OR) __   (Optional)              *BLANKS = a blank
   Pos 000 of detail line is EQ/NE EQ to the value
                                                 *BLANKS = a blank
 Delete Code: _ (D to Delete)
 F3 =Exit                    F12 =Cancel                  Enter =Continue

MA    B                                                        06/052
```

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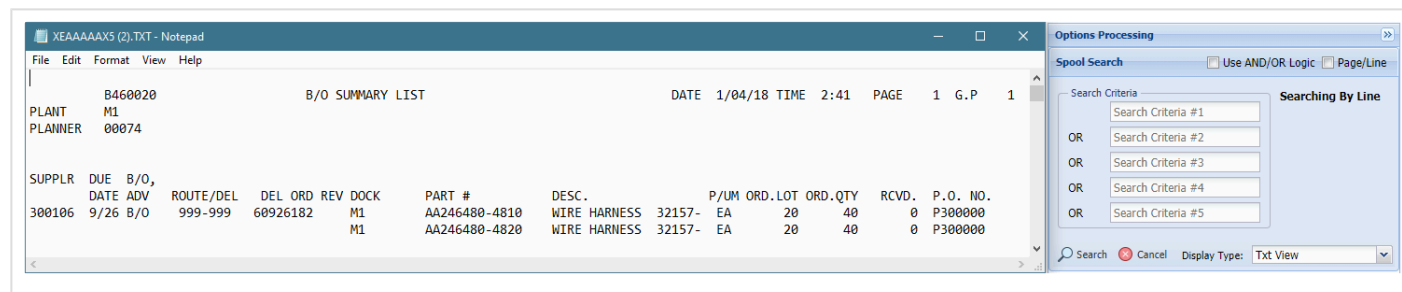
8.31. Stapling

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:

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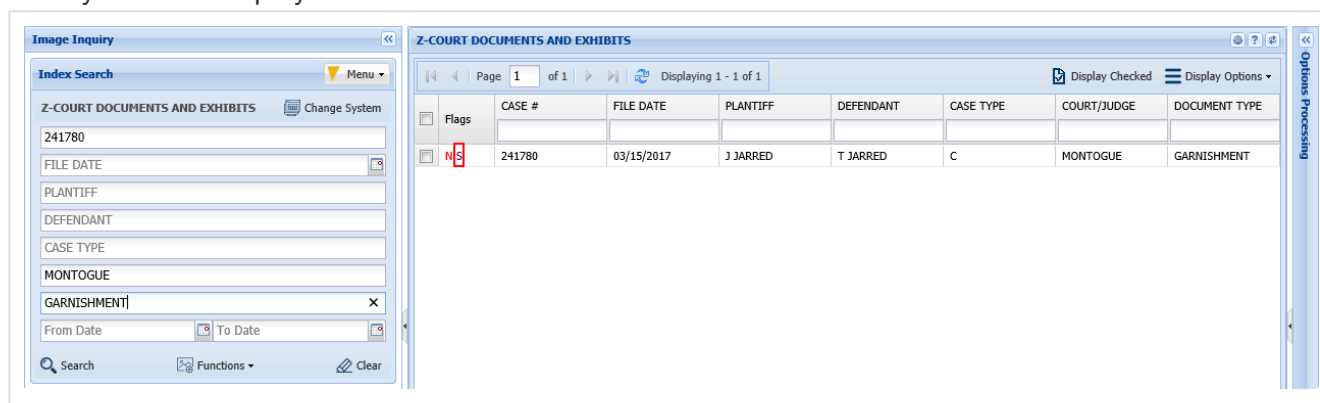
- The button will be available.

- Click the Stapling button to see a list of the documents that are stapled to the primary document. Double click the record to view the stapled documents.
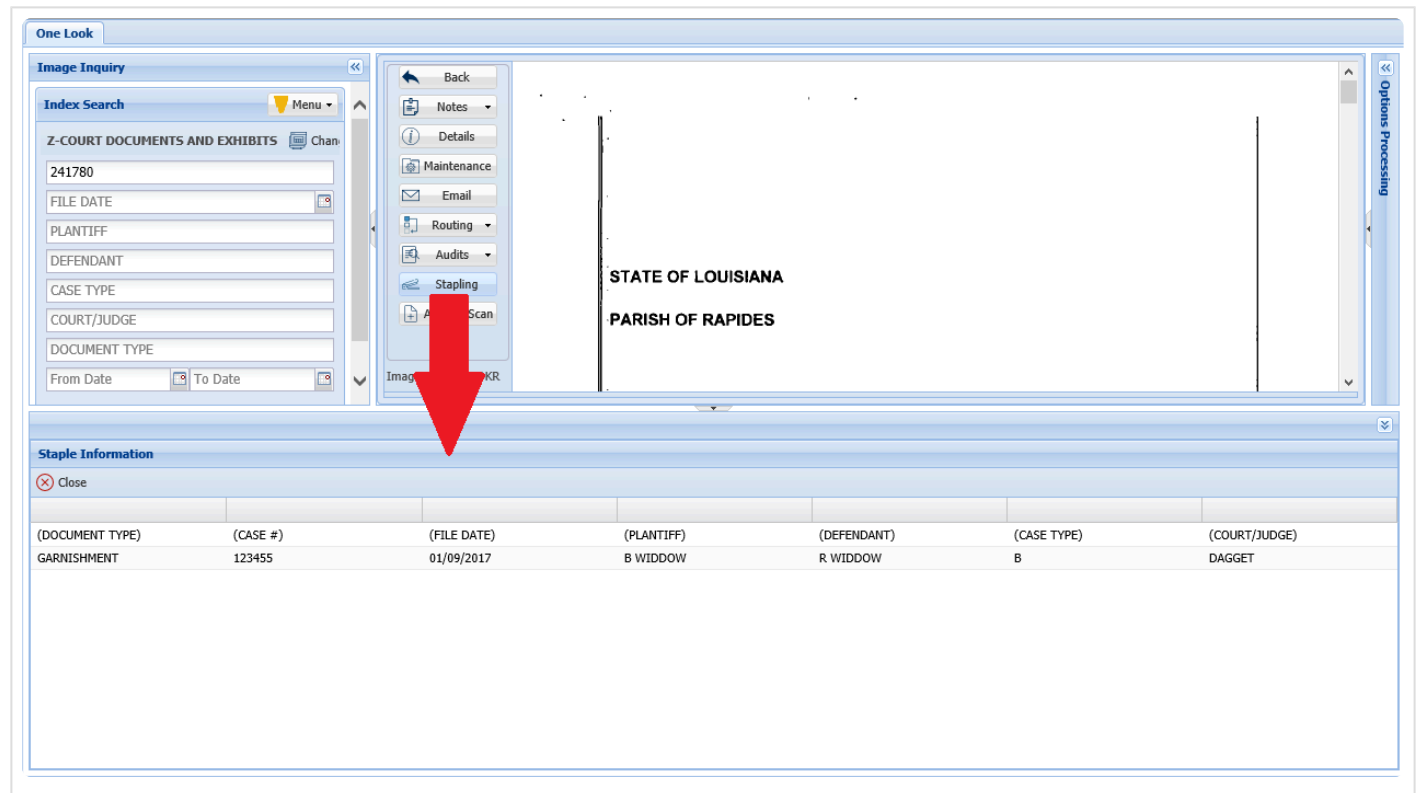
> * For further details on Automatic Stapling and the setup requirements, refer to Chapter 18 (Auto-Stapling) in the RVI 90 IBMi User Manual.

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

To watch a video on this topic CLICK HERE

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

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

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

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**.

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

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

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

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

Right-mouse click the record you want to add to the stapled bundle. Select Add to Staple Grid.

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

6. Select Display Options / **Display Staple Grid**.
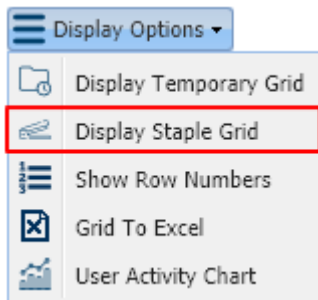
7. Select **Finalize Staple** to add the new document to the existing bundle.

Manual Staple Grid

	(COURT DOCUMENTS AN...	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
Primary (Seq 1)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
Secondary (Seq 2)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
Secondary (Seq 3)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME
Secondary (Seq 4)	Z	011319	04/24/2019	K ILES	O PAUL	E	W TIME

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

Staple Information

(DOCUMENT TYPE)	(CASE #)	(FILE DATE)	(PLANTIFF)	(DEFENDANT)	(CASE TYPE)	(COURT/JUDGE)
JUDGEMENT	011319	04/24/2019	K ILES	O PAUL	E	W TIME
ORDER	011319	04/24/2019	K ILES	O PAUL	E	W TIME
PIC	011319	04/24/2019	K ILES	O PAUL	E	W TIME

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**.

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

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

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

4. Select Finalize Staple.

The reorganization of the records is now complete!

8.31.3. 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**.

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

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

4. Select **Remove Record**.

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

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

8.31.4. 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**.

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

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

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

4. Select **Remove Record**.

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

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

Option 2:

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

Option 3:

Display an image within One Look, select 'Add to Temporary' button.
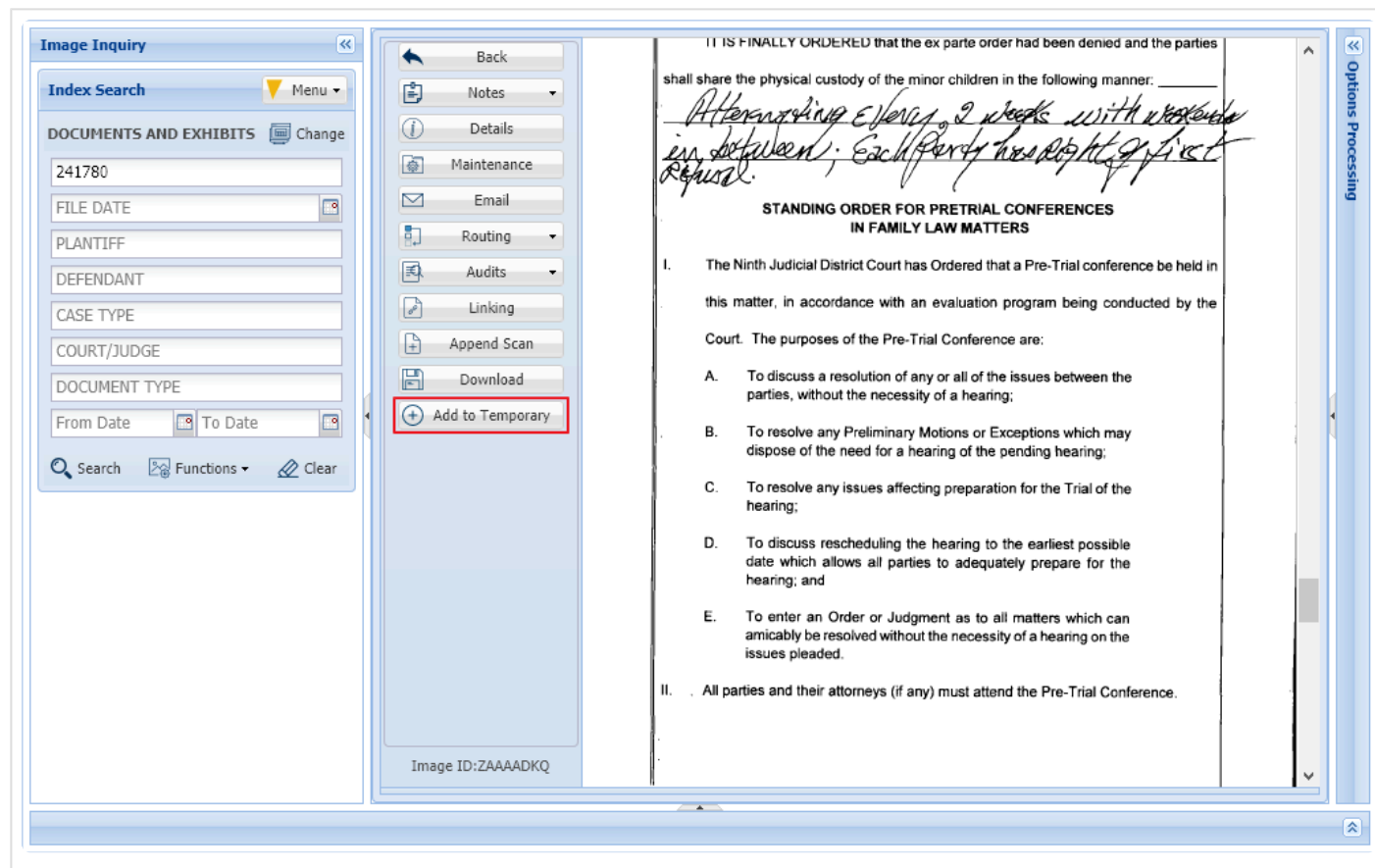
The Temporary Grid can be displayed by selecting Display Options, Display Temporary Grid from the top right-hand corner of the One Look window OR display a document from any system and select Display Temp Grid from the left side functions.

Temporary Grid Features:

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

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

selecting Remove Record.

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

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

8.33. Versioning

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

The **Version Document** button is available when viewing Type **O** documents such as Microsoft Office and PDF files.
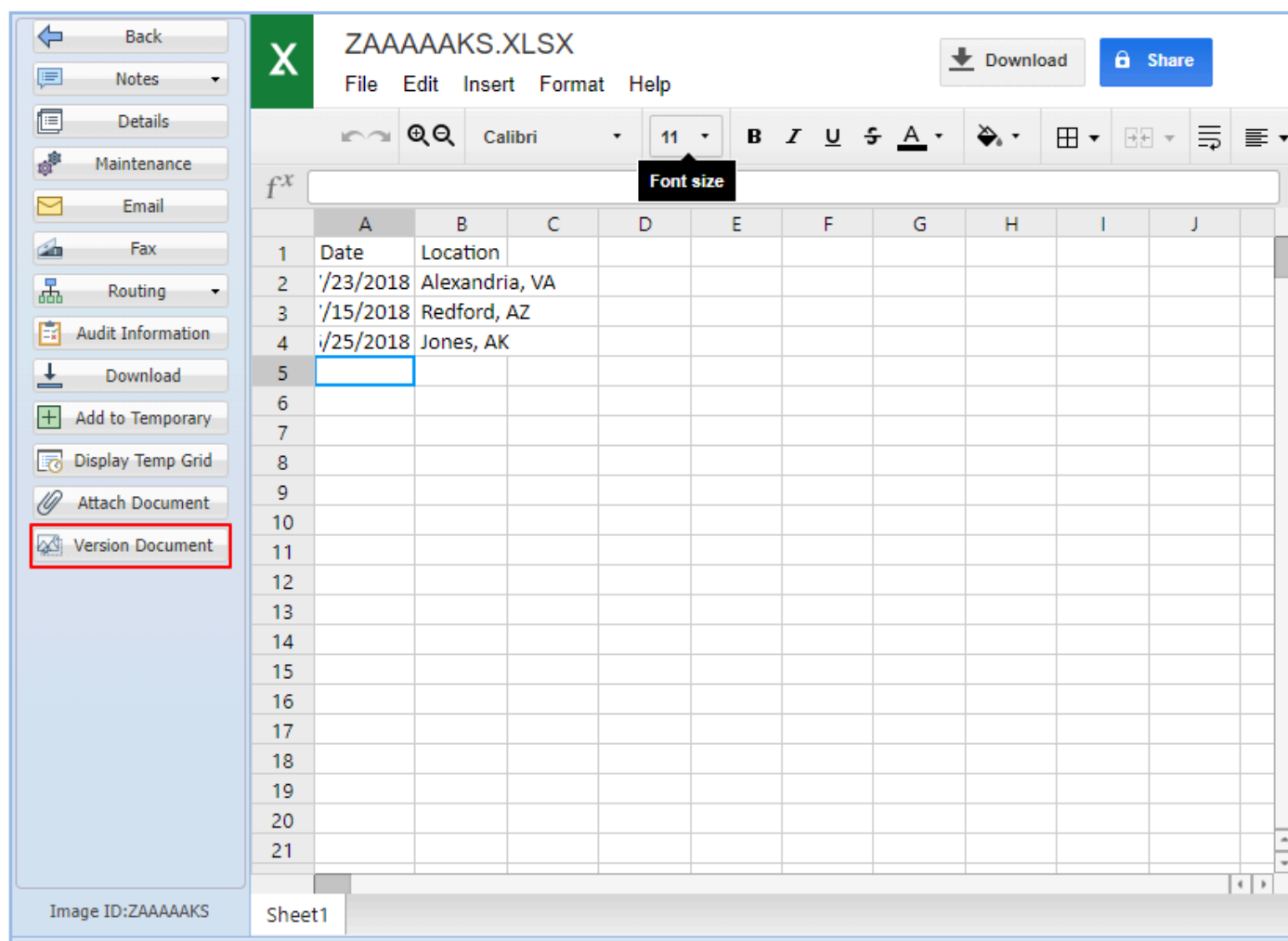
Once the **Version Document** button is clicked, a pop up box will appear allowing the user to click **Browse** to navigate to the new version.

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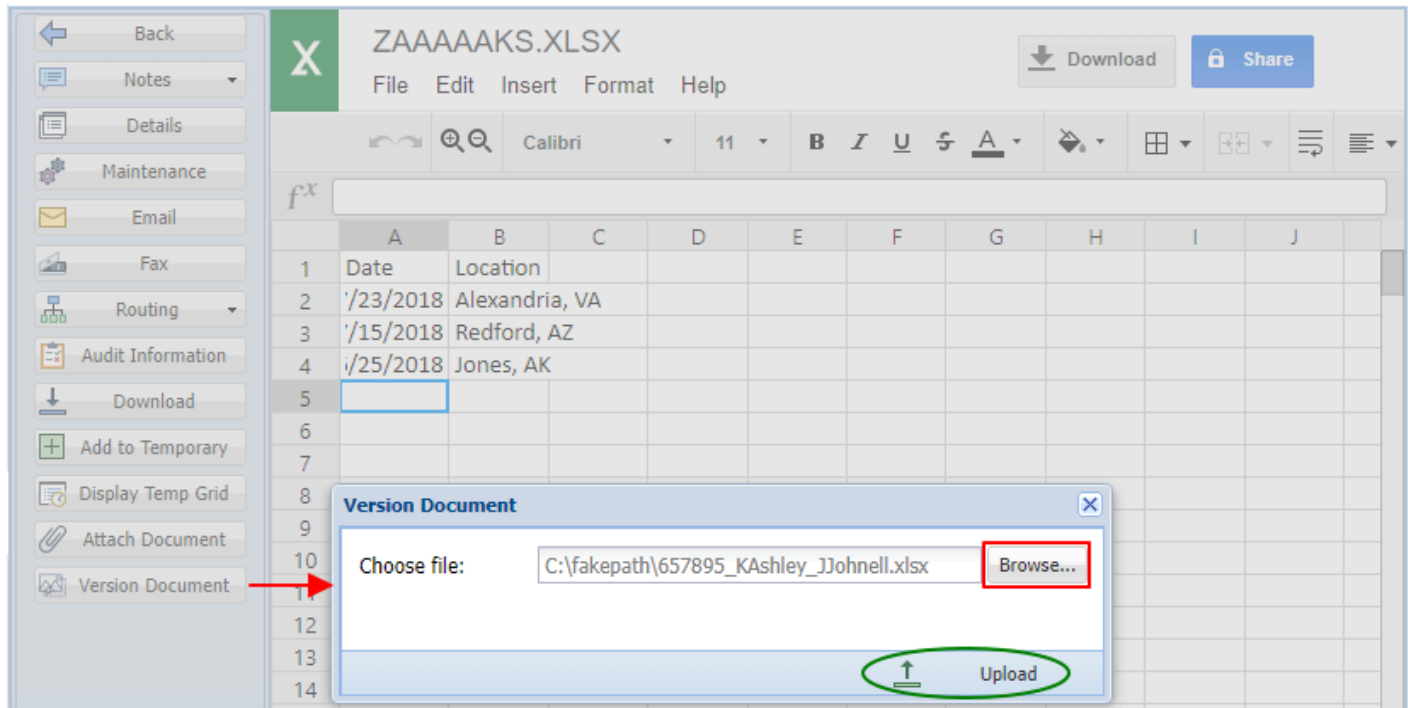
Once the upload is complete, refresh the subfile list. A **V** will appear under the Flags column to identify any versioned documents.

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

8.34. View

To watch a video on this topic CLICK HERE.

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

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

specific date ranges based on creation date. If no index is required, the user can select the

button to view ALL images in the system code.

To set the number of records per page, click the **Settings** icon in the top right corner of the screen.
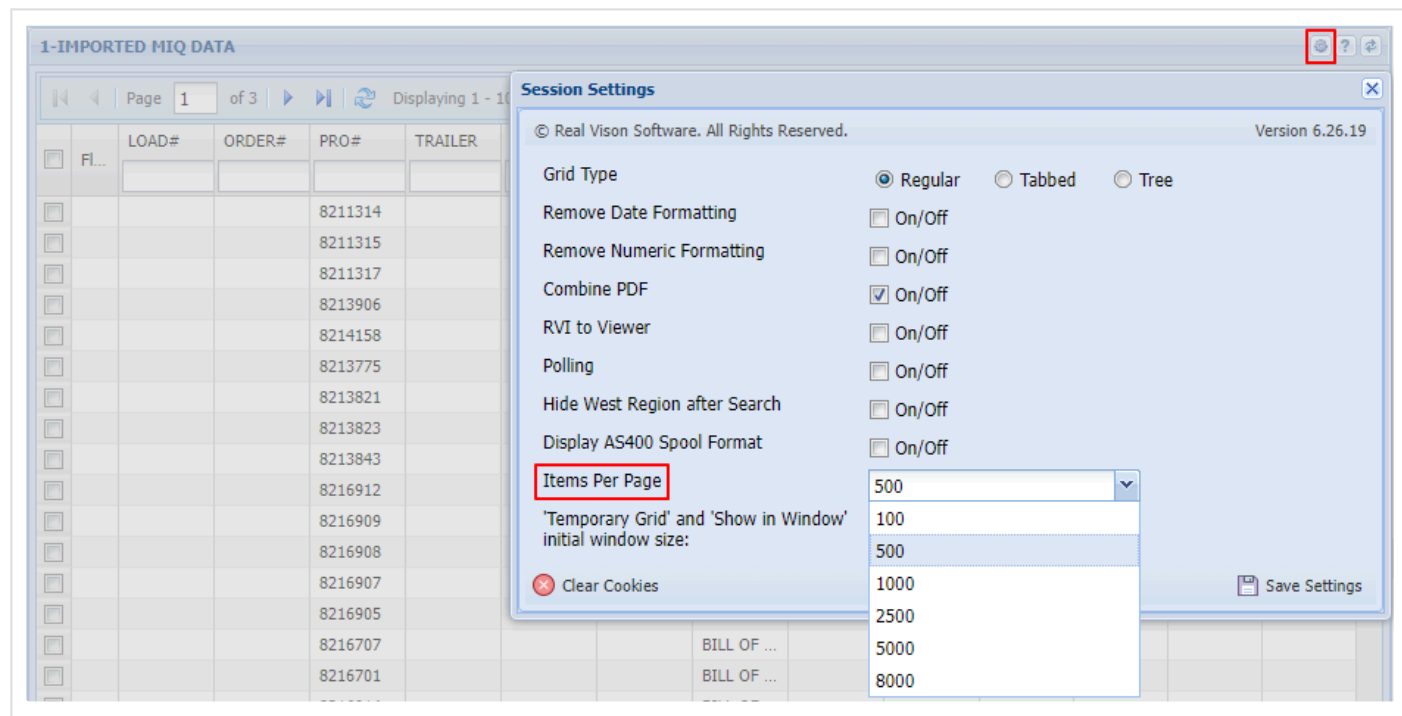
Use filtering to limit the number of records. For each index column displayed, there is a space to filter the total items displayed in the sub file list. For example, if in the DOCUMENT TYPE column the user entered PETITION, the sub file list results would only show those items with PETITION in the DOCUMENT TYPE field.

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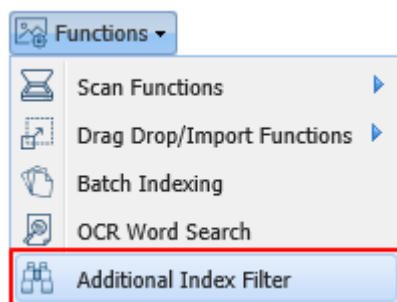
2. Double click the image to be viewed or select multiple check boxes for the items you want to display then click the Display Checked button. When Display Checked is used, the user will have the Combine PDF button to temporarily combine and display images (not Office documents) as a single PDF. The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

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

> ❗ By default, One Look displays images as PDF. Customers needing to view OEM documents (ie. Word, Outlook, Excel, Videos) or wanting to view scanned images in their original file format will need to install the **RVI PC Viewer** then set their session settings to RVI to Viewer.
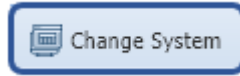
Move between systems by using the **Change System** button located in the top right corner of the Index Search window.

8.35. Workflow

See **WorkBasket**

9. CUSTOM FUNCTIONS

Contact [Real Vision Software](#) to discuss custom functions.

9.1. Signature Capture

Contact [Real Vision Software](#) to discuss One Look Signature Capture setup.

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

9.2. Z-Options

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.

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.

! 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 Custom Menus 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 CLICK HERE.

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

Parameter Definitions used in Web Calls

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

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

Examples By Function

VIEW

View Call – user chooses image system code and enters indexes:
http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisys&deltyp=p&

View Call – pass in image system code and user enters indexes:
Example below is image system code Z
http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvikeys&isys=Z&deltyp=p&

View Call – pass in image system code and indexes:
Example below is image system code Z, Index 7 = APP
http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisubf&isys=Z&i7=APP&deltyp=p&

Direct View By System/Transaction and hide URL (fields ABAACD and ABAANB from file RVILIB/RVABREP):
Example below is system/transaction 1AAADNM7
http://ipaddress:port/pgms/rvimain.pgm?rqstyp=callrviweb&pgm=doc003qwet&aaas=1AAADNM7&

SCAN

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

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

Example below is a color scan

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvisyssc1&scolor=Y&

Scan (*color or black & white*) – pass in image system code and user enters indexes:

Example below is a color scan to image system code A, Index 1 = TESTSCAN, Index 2 = SCANTEST

http://ipaddress:port/pgms/
rvimain.pgm?rqstyp=rvisyssc3&isys=A&I1=TESTSCAN&I2=SCANTEST&scolor=Y&

Scan Using Scanning Profile – user selects scan profile name from a list:

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan00&

Scan Using Scanning Profile – pass in the scan profile name:

Example below is scan profile BTC

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvwscan01&selbox=BTC&

UPLOAD

Upload Scanned Images:

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

BATCH INDEXING

Batch Index – user chooses image system code:

http://ipaddress:port/pgms/rvimain.pgm?rqstyp=rvbchwr0&

IMPORT DRAG DROP

Import Drag Drop – user chooses image system code:

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

Import Drag Drop – pass in system code:

Example below is image system code Q

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

12. SYSTEM FILE LAYOUT

For a PDF of the RVABREP System File Layout, click HERE.

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 Real Vision Software 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.
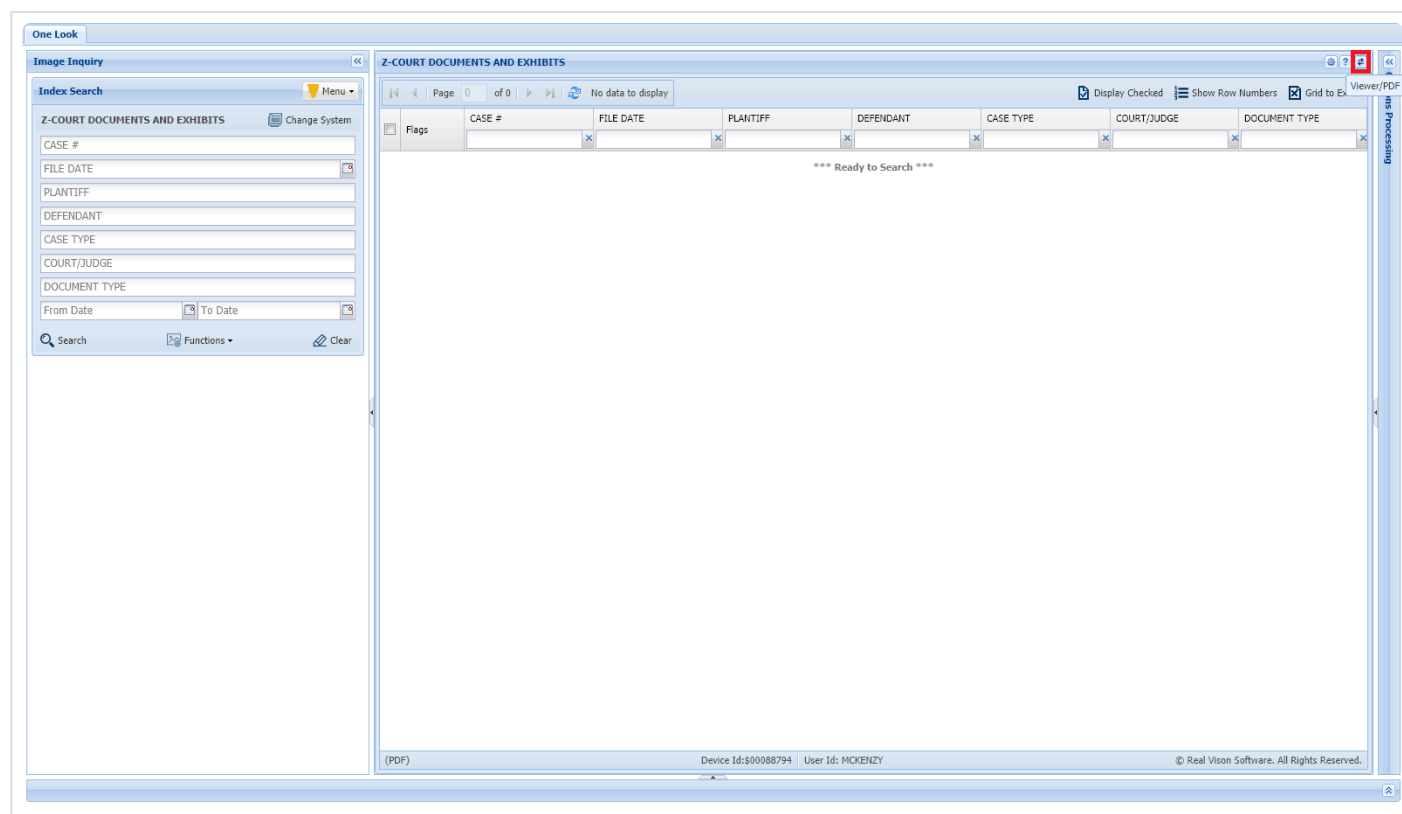
Microsoft Office Documents

The user will get a prompt in the browser to open the file.
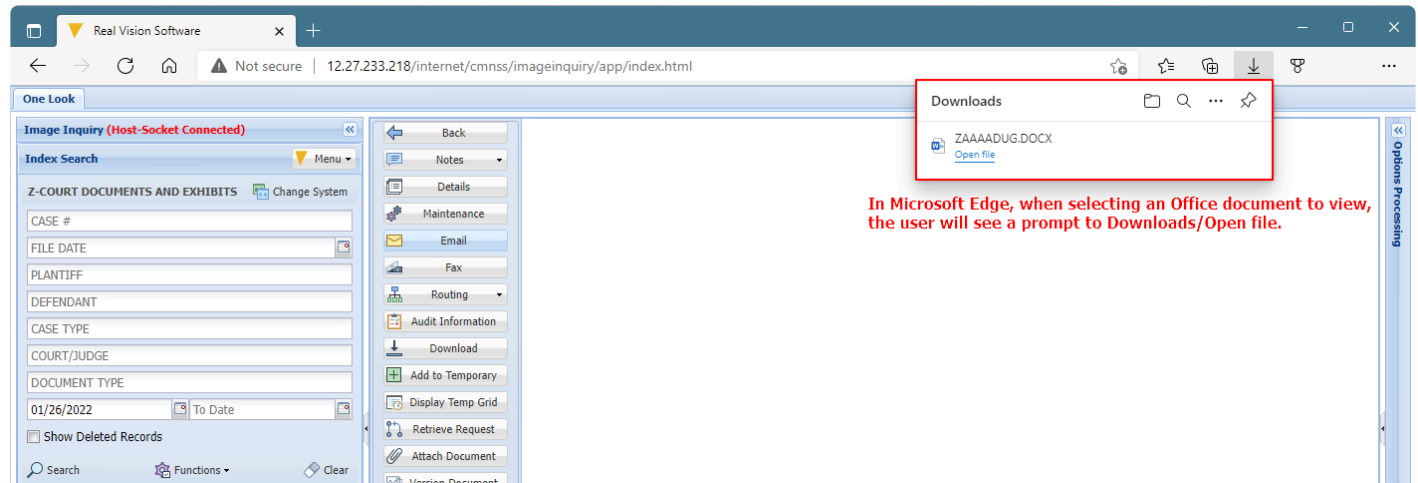
To bypass the prompt to open the file in Google Chrome, see No Preview Available for instructions on how to setup Google Chrome to view Office documents.
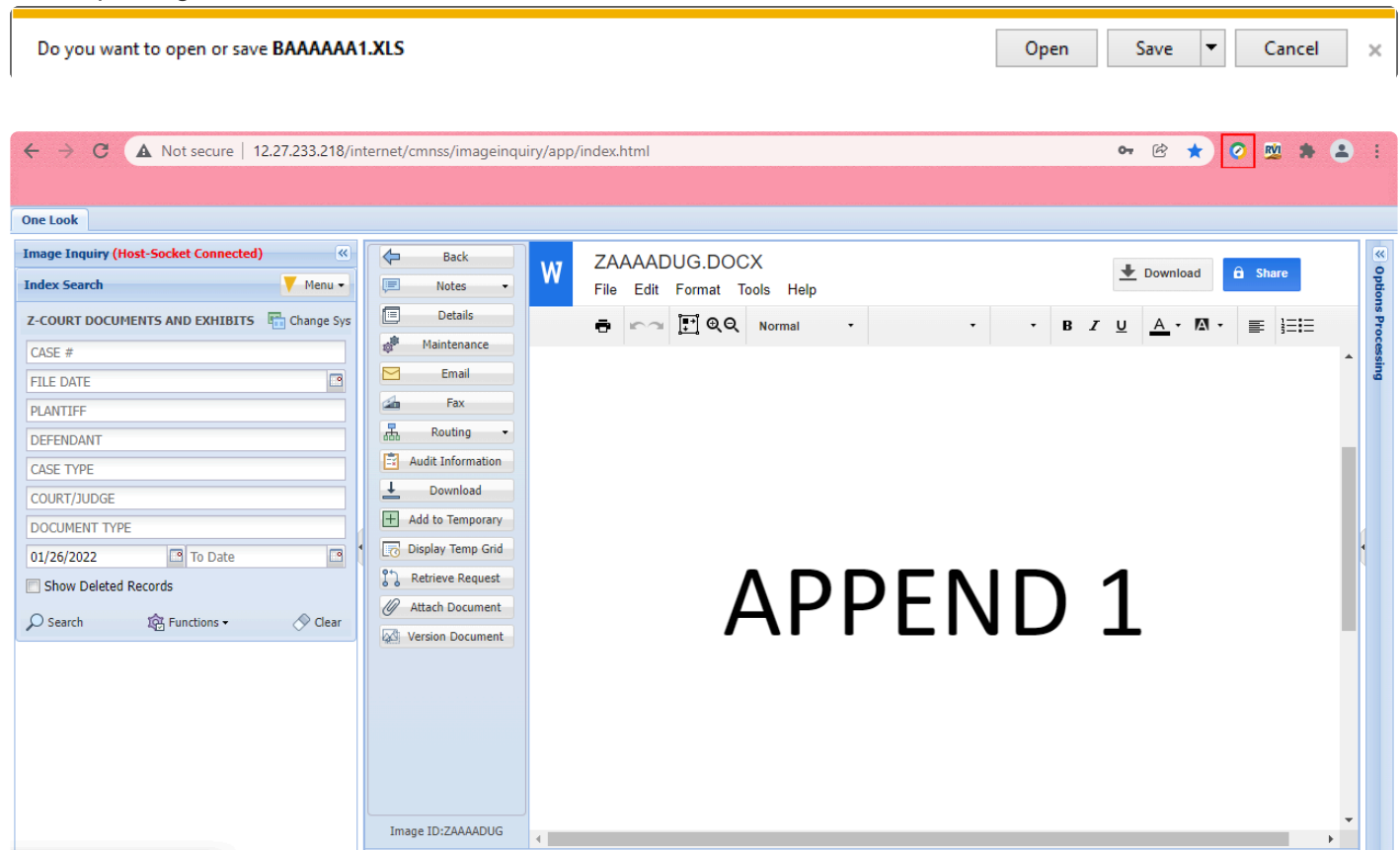
13.2. Index Search Window is Grayed Out

When the option processing window is in maintenance mode, the index search window will be grayed out.
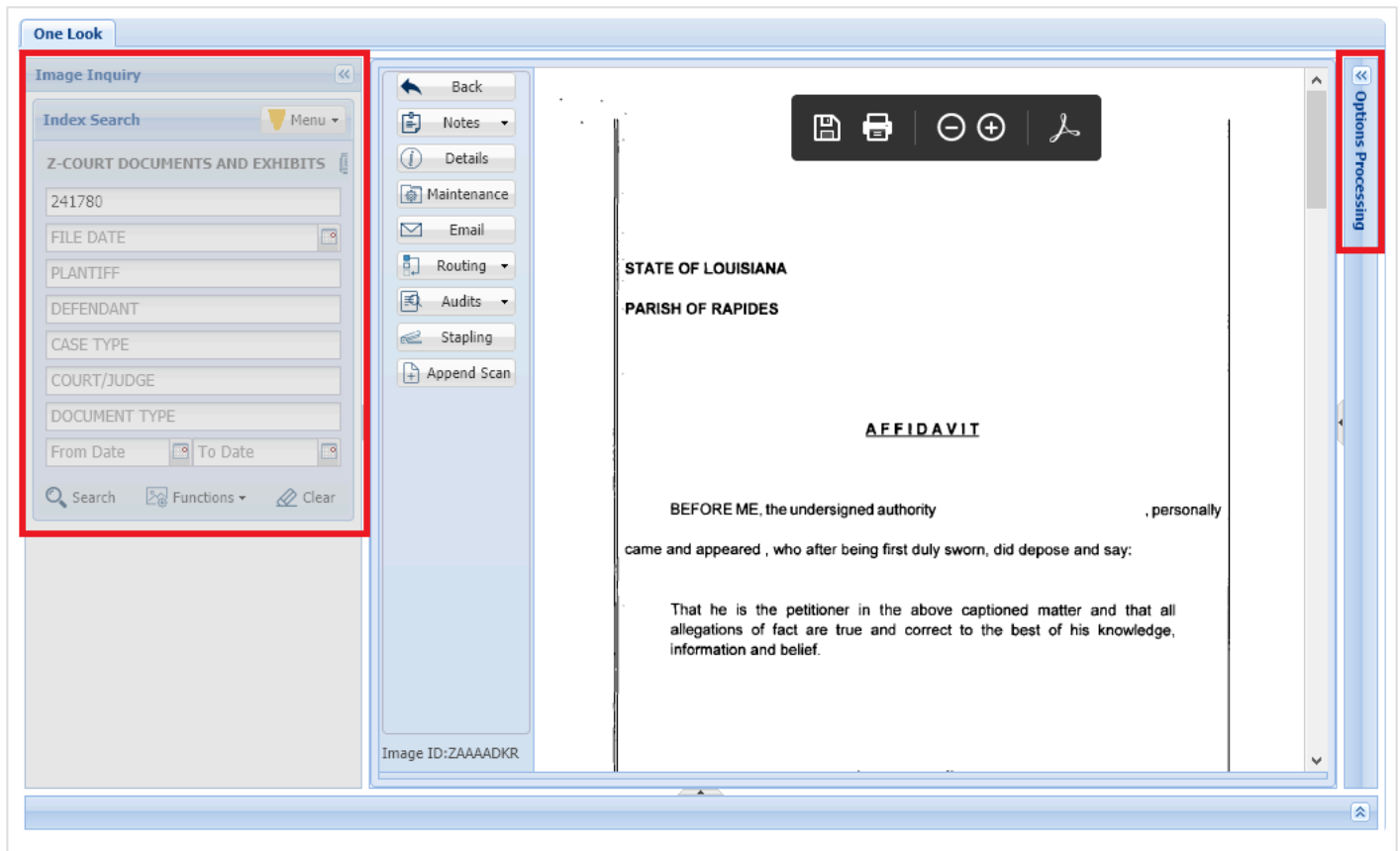
Expand the option processing window if it's not open already. Cancel out of the maintenance window. Now you will be able utilize the index search window.
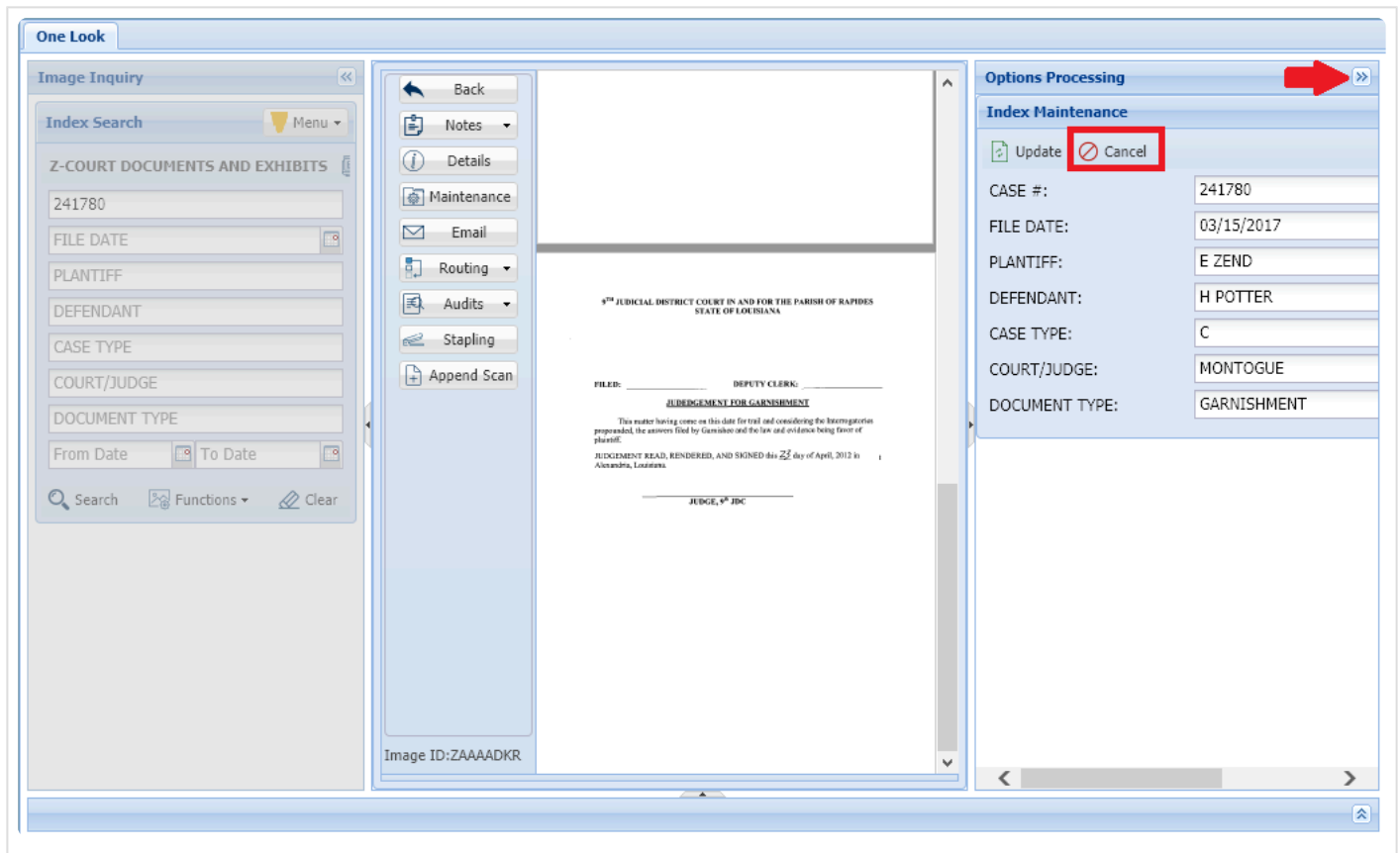
13.3. Accept / Reject Screen Not Appearing After Scan

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.
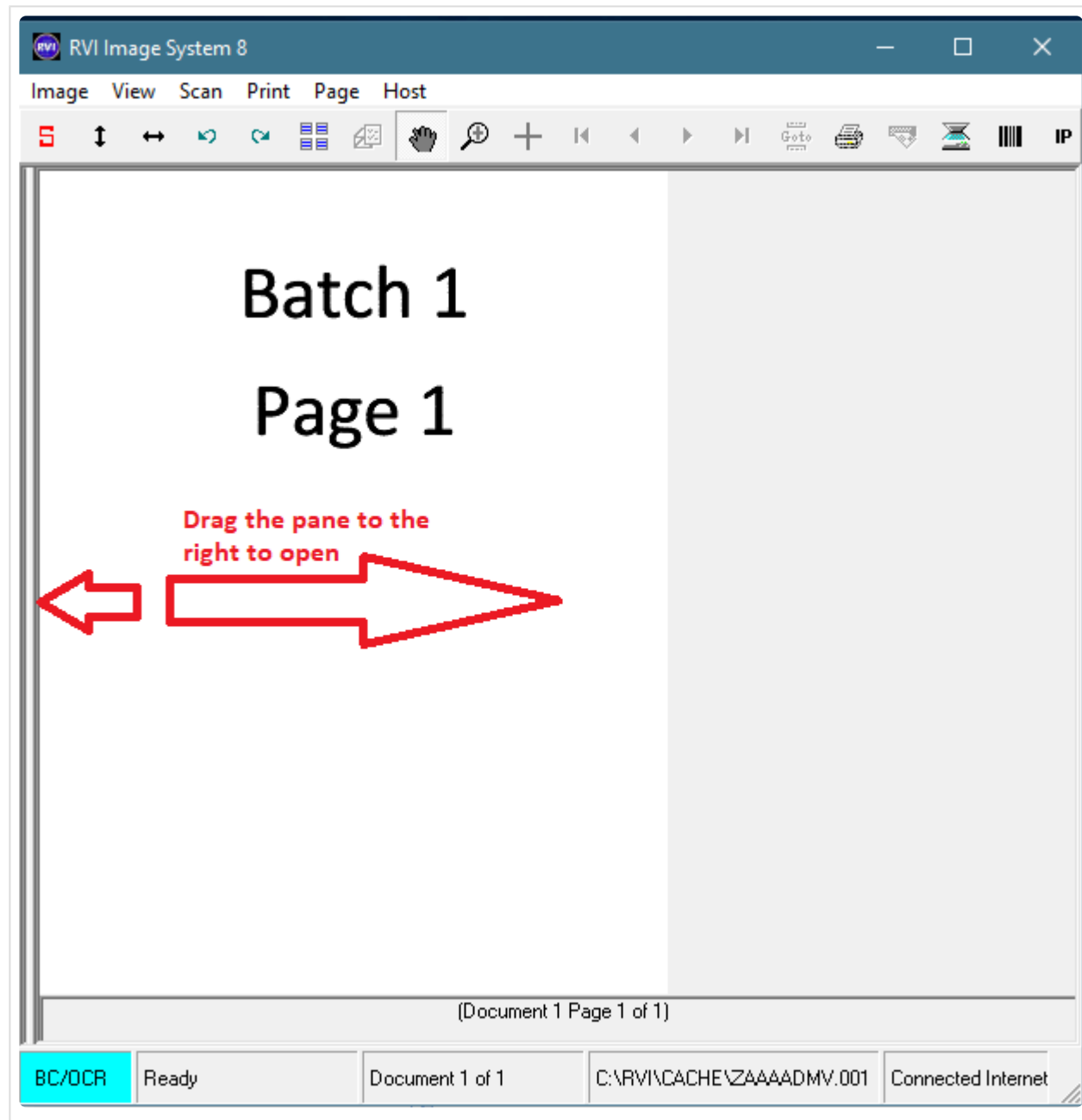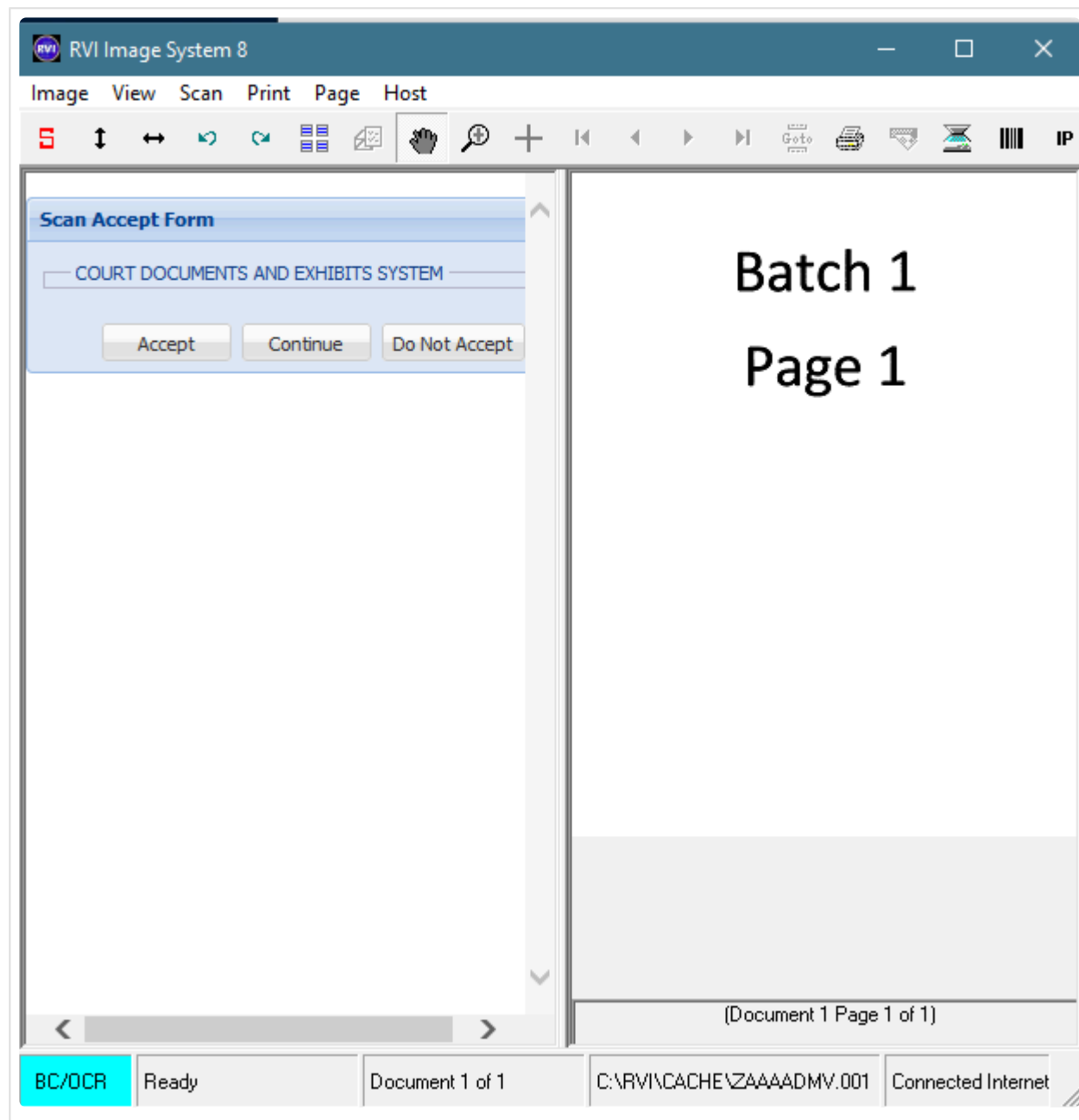
13.4. IE Prompting to Save and Open PDF

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.
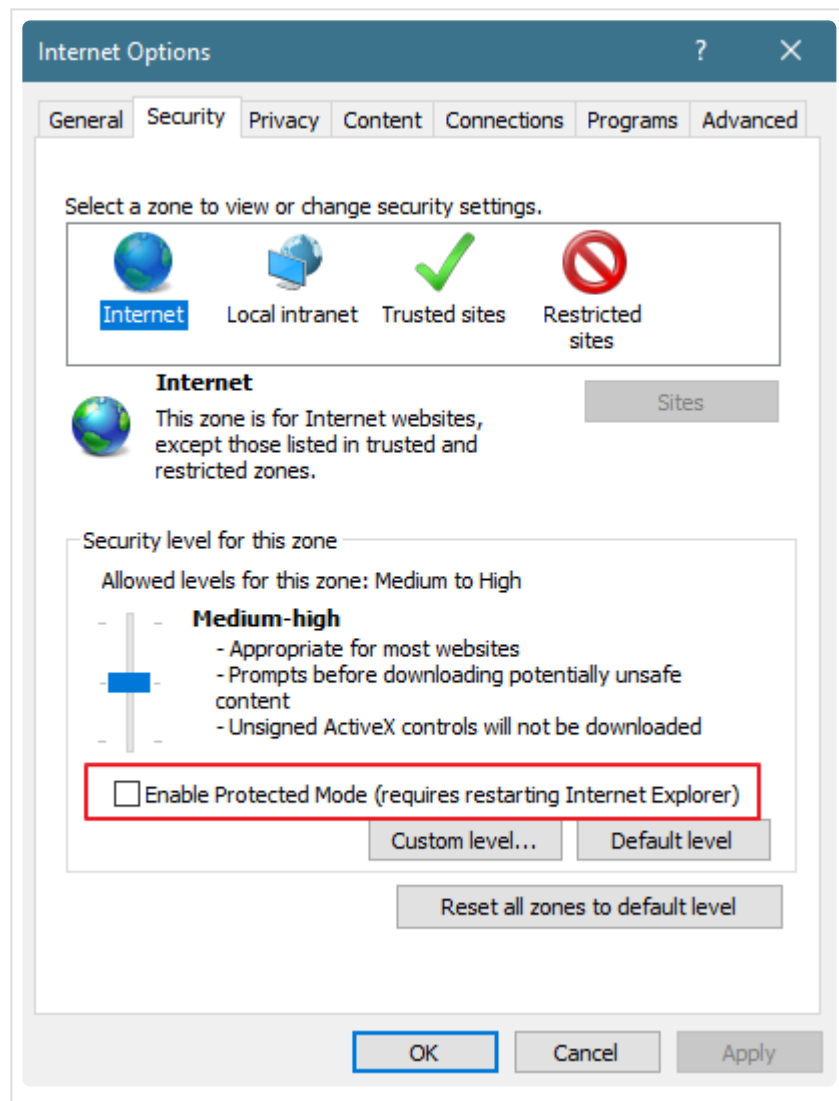
13.5. Open or Save RVIMAINXML.PHP

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:
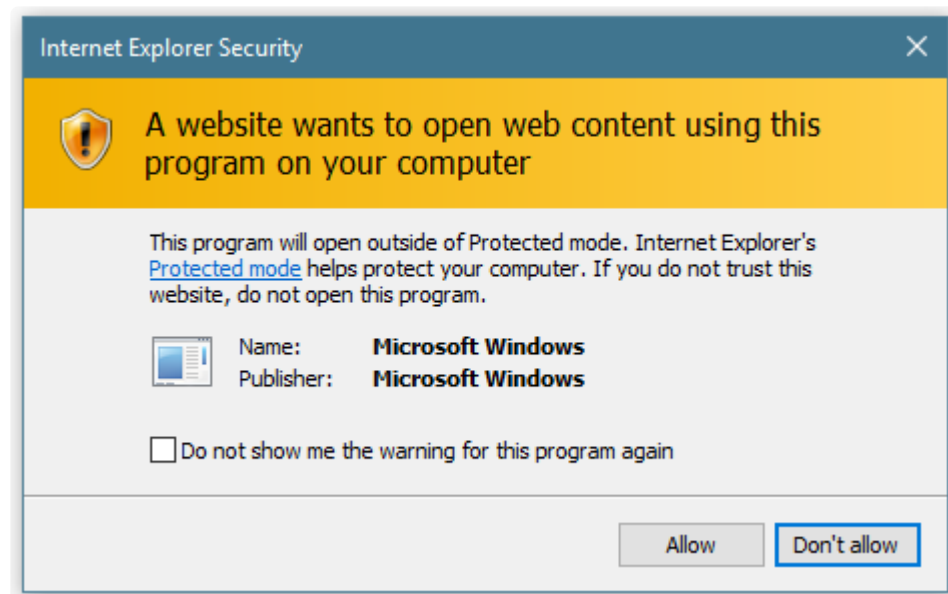
Google Chrome users should not receive these types of messages. Chrome has a built in plugin to view PDFs.
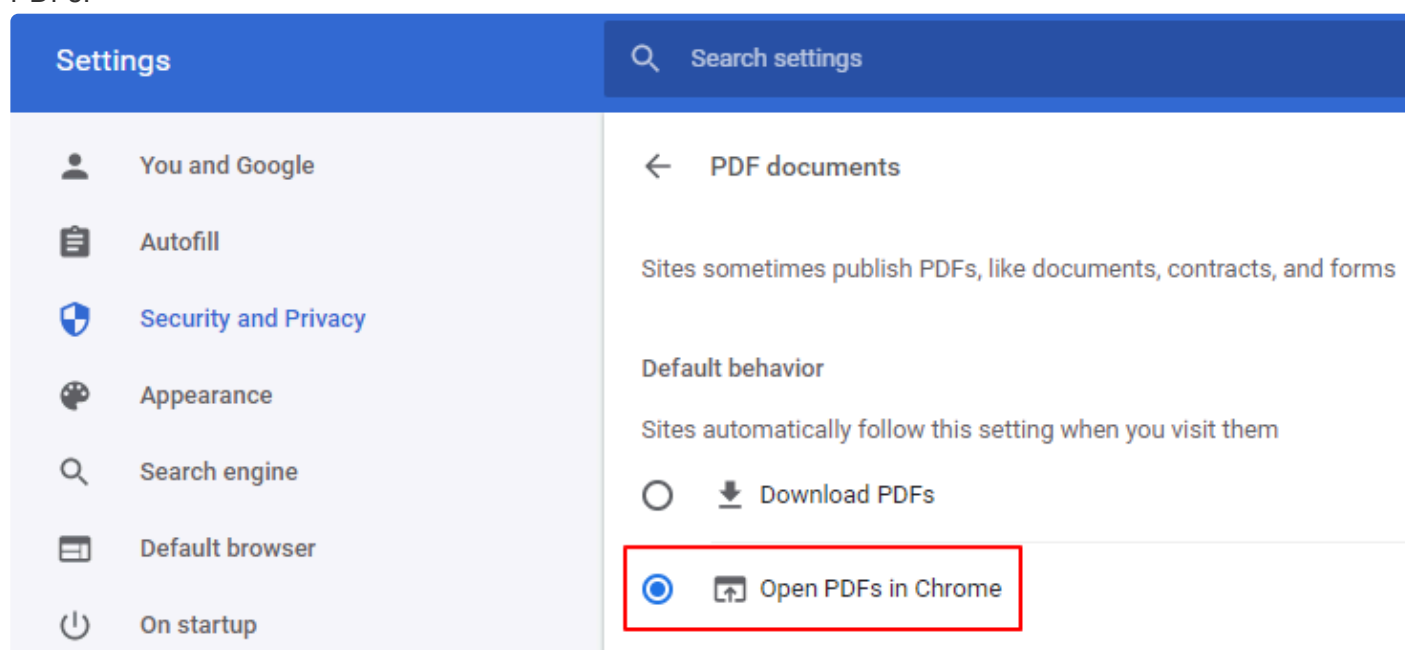
13.6. No Preview Available

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

To Resolve the Message:

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

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

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

```
main.js - Notepad

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

4. Change this.officedocs = "Y"; to:
   // this.officedocs = "Y"

5. From an IBMi command line type:
   UPDDTA RVIMGWPF

6. Set RCFEXT: to DOCX *(or the appropriate Office file extension)* then page down to access the record.

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

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

  RCFATT: Y
```
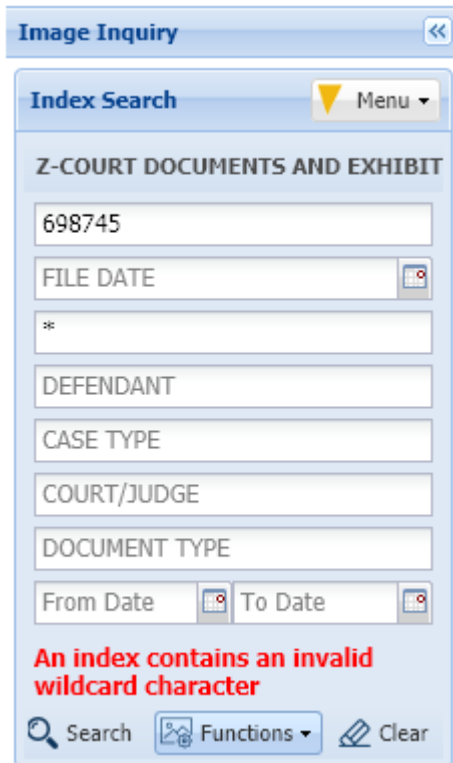
7. Set RCFATT: to **Y**

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

Google Chrome users should download the [Office Editing for Docs, Sheets, & Slides](#) plug-in.

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.

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 Authority


   Object . . . . . . . . . . . . . :     /cgibin
   Type . . . . . . . . . . . . . . :     DIR
   Owner  . . . . . . . . . . . . . :     MONTY
   Primary group  . . . . . . . . . :     *NONE
   Authorization list . . . . . . . :     *NONE


   Type options, press Enter.
     1=Add user    2=Change user authority    4=Remove user


                        Data      --Object Authorities--
   Opt   User         Authority  Exist  Mgt  Alter  Ref

    _    _____    _____
    _    *PUBLIC       *RWX        X      X     X     X
```

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:

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

       90. Sign off

Selection or command
===> █
```

```
PCSTSK                          iSeries Access Tasks

Select one of the following:

  User Tasks
        1. Copy PC document to database
        2. Copy database to PC document
        3. Work with documents in folders
        4. Work with folders
        5. iSeries Access Organizer

  Administrator Tasks
       20. Work with iSeries Access administrators
       21. Enroll iSeries Access users
       22. Configure PC connections
       23. Work with line description query status
       24. Start servers for iSeries Access clients

Selection or command
===> █
```

You will then see the following screen:

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.
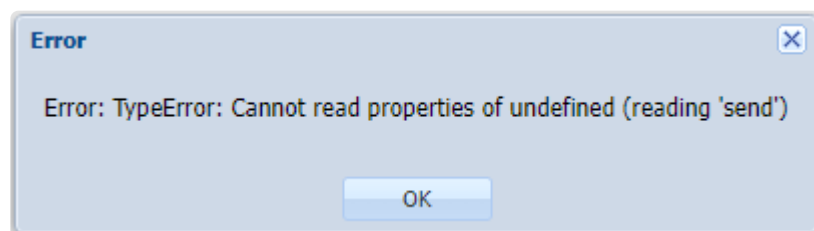
The error is due to one or more of the following:

• 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.
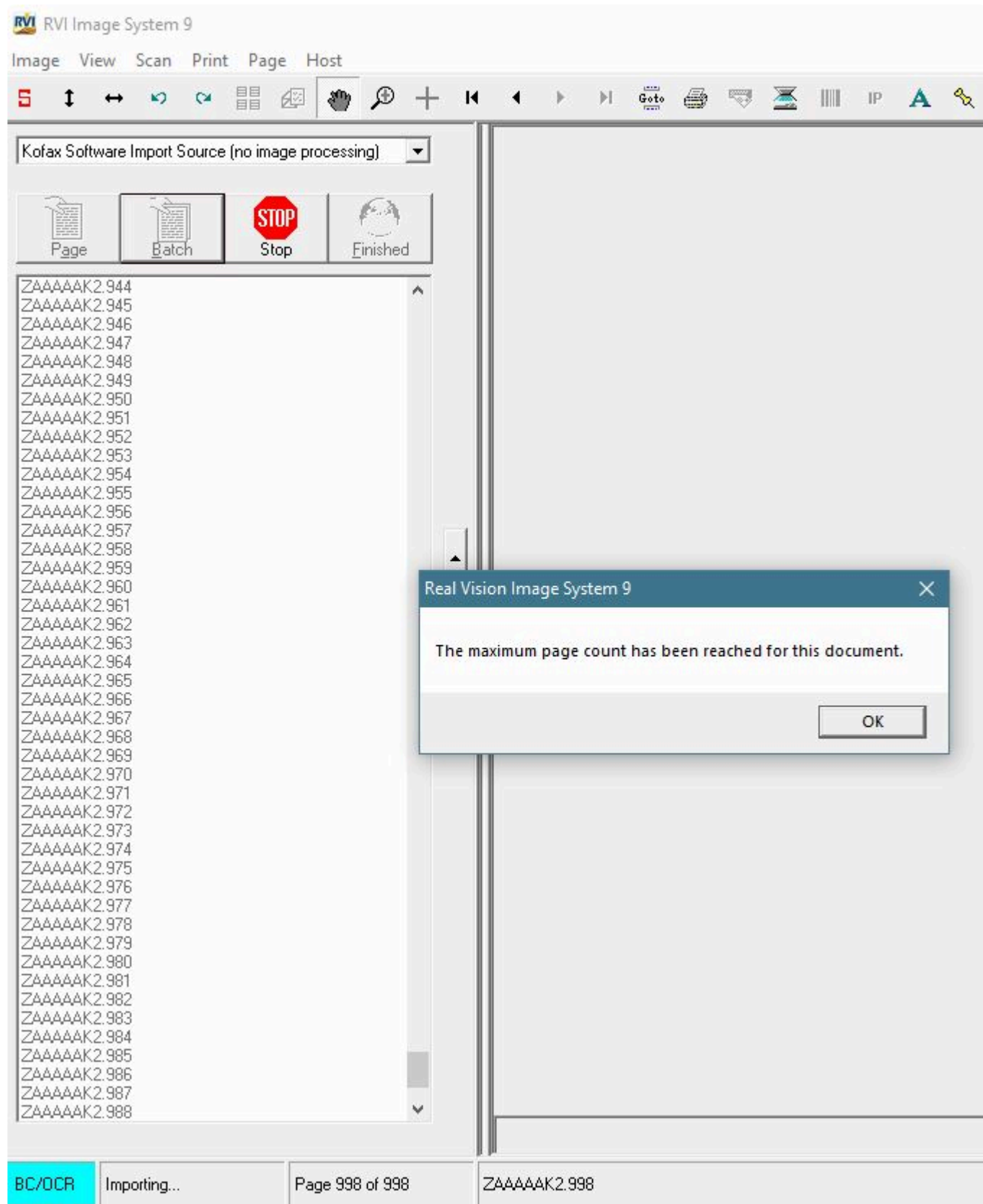
If more than 998 pages are needed, create a new record with the additional pages then staple it to the original 998 page record. Another option is to create a PDF of all the pages then import the PDF.

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 RVI PC viewer 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 **Real Vision Software**, Support, Support Resources, Login *rvi4579*, Version 9.0.
2. Select RVI PC Installation Version 9.x.
3. Extract the .zip file to the PC hard drive.
4. Open **RVI9x** 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.
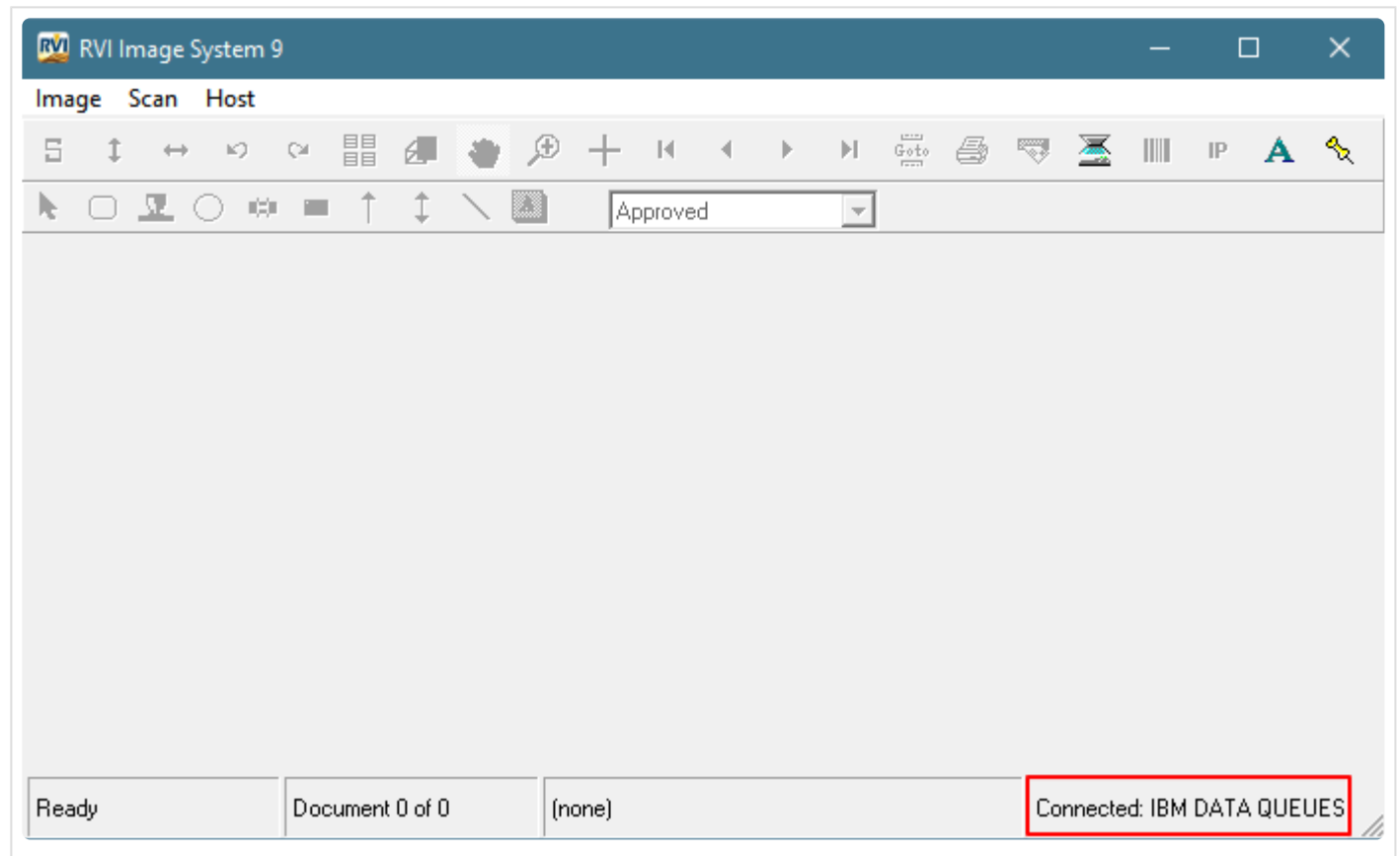
To establish the RVI PC viewer to One Look connection, set the EHLLAPI value to **IBM DATA QUEUES**. For a full set of instructions on setting up the socket connection and the RVI PC Viewer, refer to Setup/ Maintain IBMi Host Socket

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

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.

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
                                                             RVAWCNFFM/SCRN1

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

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

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


  F3 =Exit
```

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

   3. Spool File Menu.      8. Maintenance Menu.         13. Import External Documents.

   4. Color Menu.           9. Document Tab Menu.        14. System Operator Menu.

   5. Fax/E-Mail Menu.     10. OCR Menu.                 15. Customer Specific Menu.



     F3 =Exit             Help Available                      90 =Signoff
    Selection or command
    ===> WRKLNK 'WWW'

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


 MA    C                               A                            20/007
```

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

```
                        Work with Object Links

    Directory  . . . . :   /

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

    Opt    Object link              Type       Attribute    Text
    5_     WWW                       DIR


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

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

```
                        Work with Object Links

    Directory  . . . . :   /WWW

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

    Opt    Object link              Type       Attribute    Text
    __     PCWEB                     DIR
    __     RICHTEST                  DIR
    __     RICHWEBS                  DIR
    __     RVIECS                    DIR
    __     RVISECURE                 DIR
    __     RVISSL1                   DIR
    5_     RVIWEB                    DIR
    __     RVIWEBRC                  DIR
    __     RVIWEBSSL                 DIR
                                                                  More...
    Parameters or command
    ===>
    F3=Exit    F4=Prompt    F5=Refresh    F9=Retrieve    F12=Cancel    F17=Position to
    F22=Display entire field          F23=More options
```

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

```
                        Work with Object Links

 Directory  . . . . :    /www/RVIWEB


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


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






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

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

```
                        Work with Object Links

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

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

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






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

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

```
Browse : /www/RVIWEB/conf/httpd.conf
Record :          1    of         99 by  14          Column :     1      59 by  79
Control :  _

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

Identify RVI Webserver IP Address

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

15.1.5. Configure IBMi Email Server

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

   2. Scanning Menu.      7. Optical Menu.            12. Screen Scrape Menu.

   3. Spool File Menu.    8. Maintenance Menu.        13. Import External Documents.

   4. Color Menu.         9. Document Tab Menu.       14. System Operator Menu.

   5. Fax/E-Mail Menu.   10. OCR Menu.                15. Customer Specific Menu.



      F3 =Exit              Help Available                    90 =Signoff
    Selection or command
    ===> 6
```

3. Select 5: Rubber Stamp Action Codes

```
                 REAL VISION IMAGE MANAGEMENT MENU



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

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

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

```
Routing Action Codes Maintenance Screen            (c)Copyright RVI 1992, 1999
                                                              IMMSTFM/FORMAT1

              This Program Allows You To Maintain Routing Action Codes.


   To View A List Of All Action Codes On File, Leave The Action Code Blank And
                                Press Enter.




                            Action Code:    _

                     Available Action Codes Are 0 - 9





   F3 =Exit                                              Enter =Continue

MA    B                                                              14/047
```

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

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



            Action Code:   5

            Description:   CANCELLED

            Additional Information Required?:    _    (Y/N)




                                        Delete Code:   _   (D=Delete)




   F3 =Exit                 F12 =Cancel                    Enter =Continue
 MA    B                                                            09/036
```

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

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




 Page Up =Previous Page                              Page Down =Next Page
 F3 =Exit                    F12 =Cancel               Enter =Continue
MA    B                                                            08/004
```

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

15.1.7. CALL MVC013 or MVC013D

MVC013: Scan to PC

The parameters are described below.

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

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

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

For multi-page batch or multi-page barcode scans, Index 7 can also be optionally structured as follows:
Positions 1-4, #999, where 999 is the number of pages per image.
Positions 5-12, **Routing profile**
Positions 13-20, **Barcode profile**
Positions 21-30, **Document type**

MVC013D: Scan Direct

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

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

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

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

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

```
MAIN                              OS/400 Main Menu

Select one of the following:


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

        90. Sign off


Selection or command
===>
```

```
PCSTSK                         iSeries Access Tasks

Select one of the following:

  User Tasks
         1. Copy PC document to database
         2. Copy database to PC document
         3. Work with documents in folders
         4. Work with folders
         5. iSeries Access Organizer

  Administrator Tasks
        20. Work with iSeries Access administrators
        21. Enroll iSeries Access users
        22. Configure PC connections
        23. Work with line description query status
        24. Start servers for iSeries Access clients



Selection or command
===>
```

You will then see the following screen:

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 RVI 90 IBMi User Manual 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
B	View Previous Version
C	Call Back Reminders
D	Delete from Routing Queue
E	Email Image
F	Fax Image
G	Packages
H	Approval History
I	Include Page
J	Stamp Signature
K	Approve/Disapprove
L	Disable Right Mouse On Web
M	Move Image From Workbasket
N	Notepad
P	Print Image
Q	View and Re-Index
R	Routing Profile
S	Scan Documents
T	Suspended Records
U	Route User
V	View Image
X	Image Information
Z	Custom Options
c	Change Priority
d	Allow Deletion in Index Maint
e	PC Viewer Email
k	Approve/Disapprove History
m	Manual Restage
n	Auto Notes on Web

p	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
x	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.
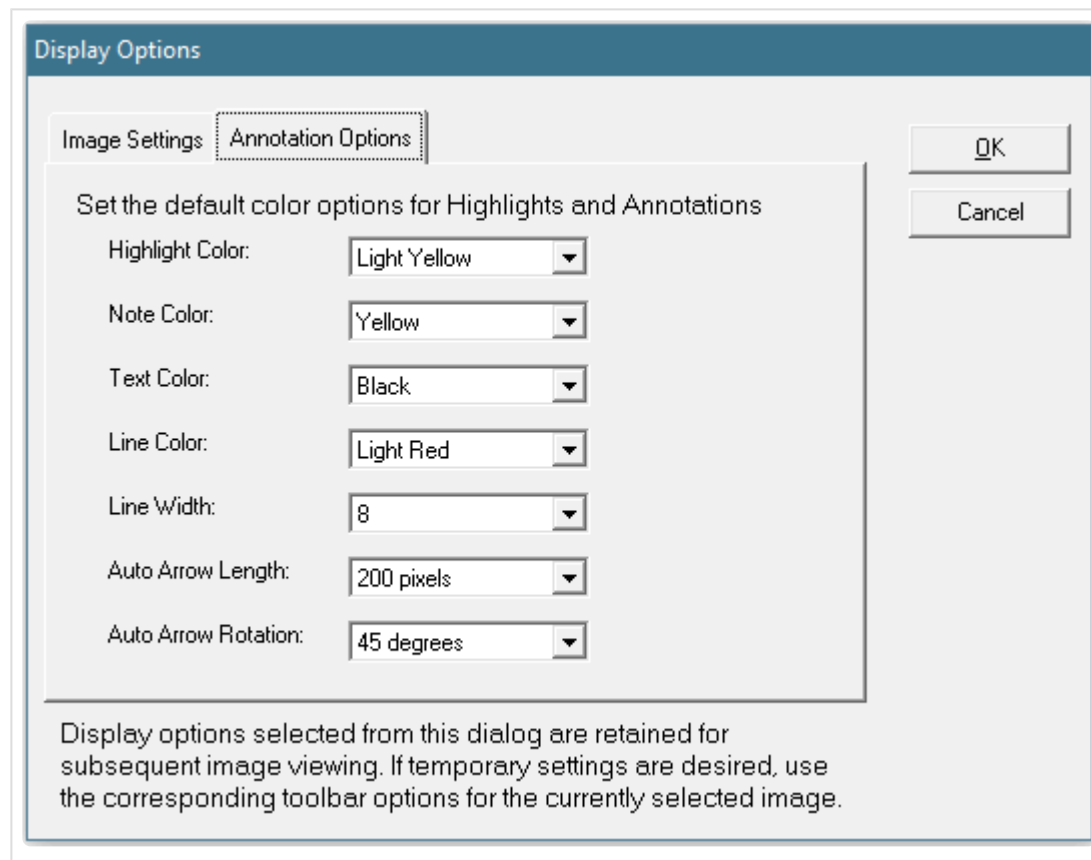
15.1.11. Setup a Scan Profile

Setup for Scan Profiles is done from the IBM i green screen. Refer to Chapter 4 (Option 16) in the RVI 90 IBMi User Manual 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 EHLLAPI 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.
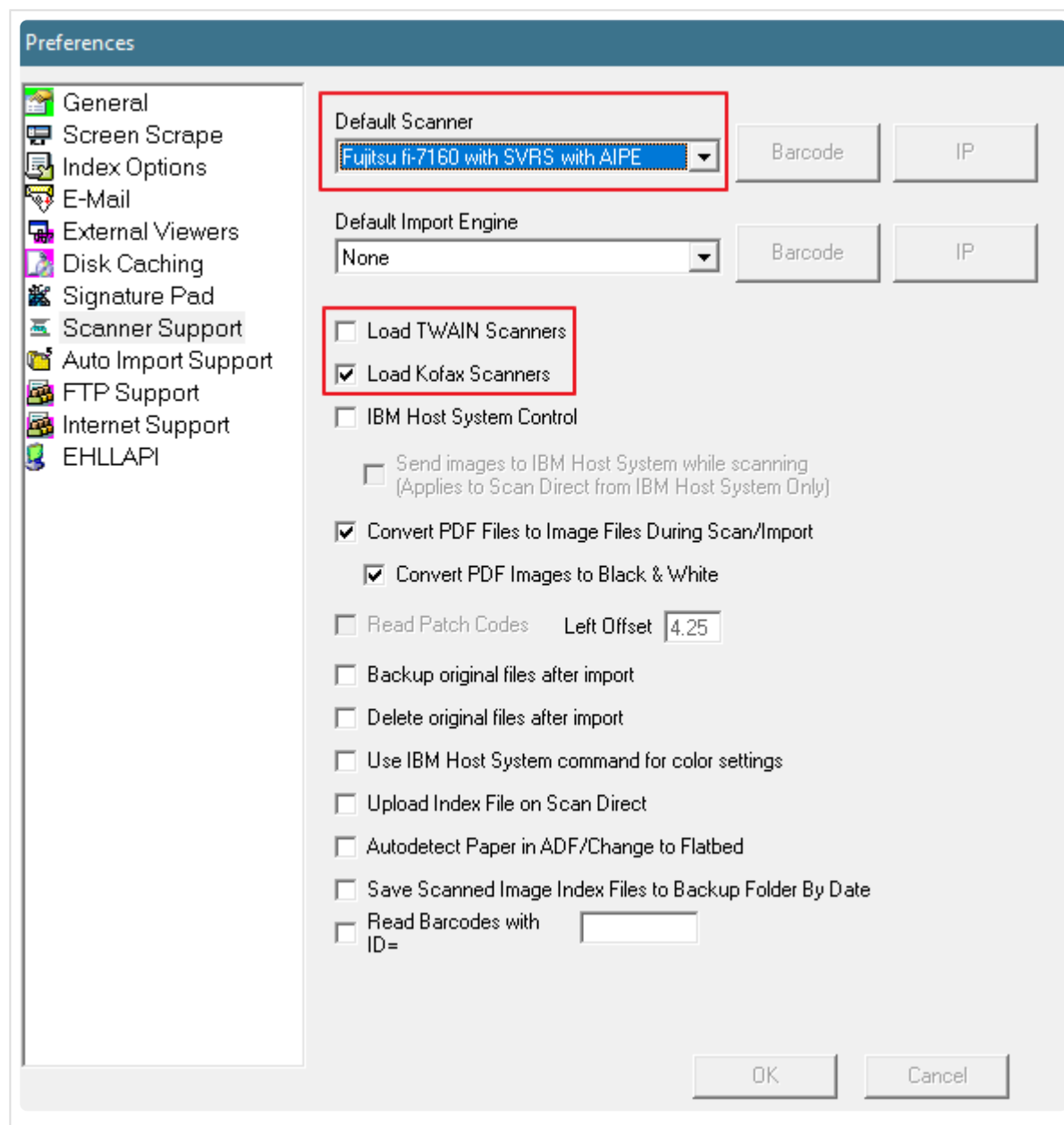
The list of scanners is based on the drivers installed on the pc. If you do not see your scanner listed, verify Windows recognizes the scanner in Device Manager.

Once the scanner is setup in the RVI PC Viewer, you are ready to scan from OneLook using the Scan Using Indexes Above Scan Using A Profile 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 Originator Email Address Maintenance          (c) Copyright 2003, RVI


Skip To User ID: _____

O User ID    User Name            Email Address














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

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

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

Sk
        RVI Originator Email Address Maintenance     (c) Copyright 2003, RVI
O
_
            User ID. . .   SCANNER
_
_           Name . . . .   SCANNER WORKSTATION
_
_           E-Mail Addr.   SCANNER@REALVISIONSOFTWARE.COM
_
_
_                 F3/F12=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.
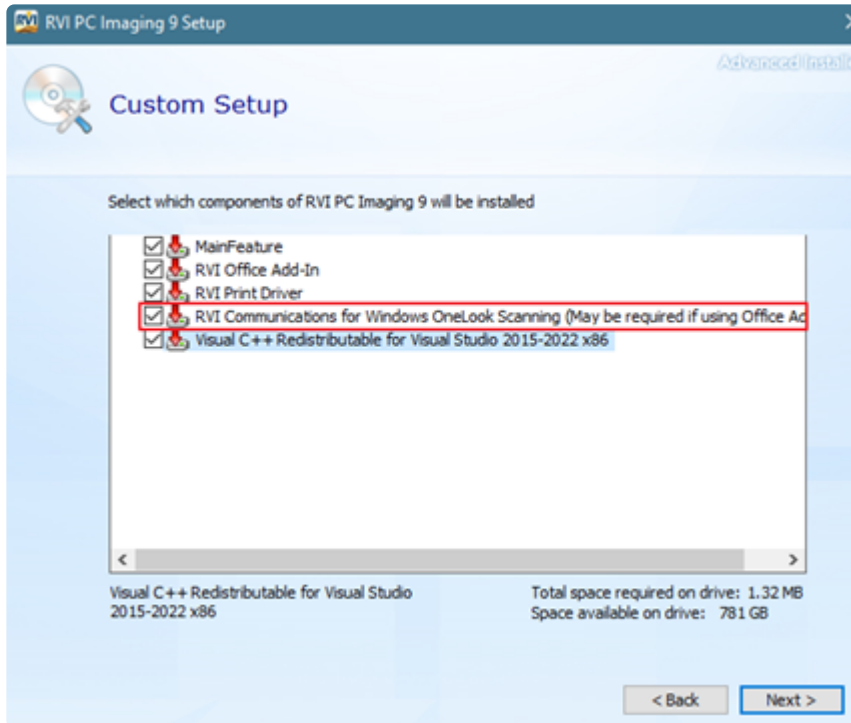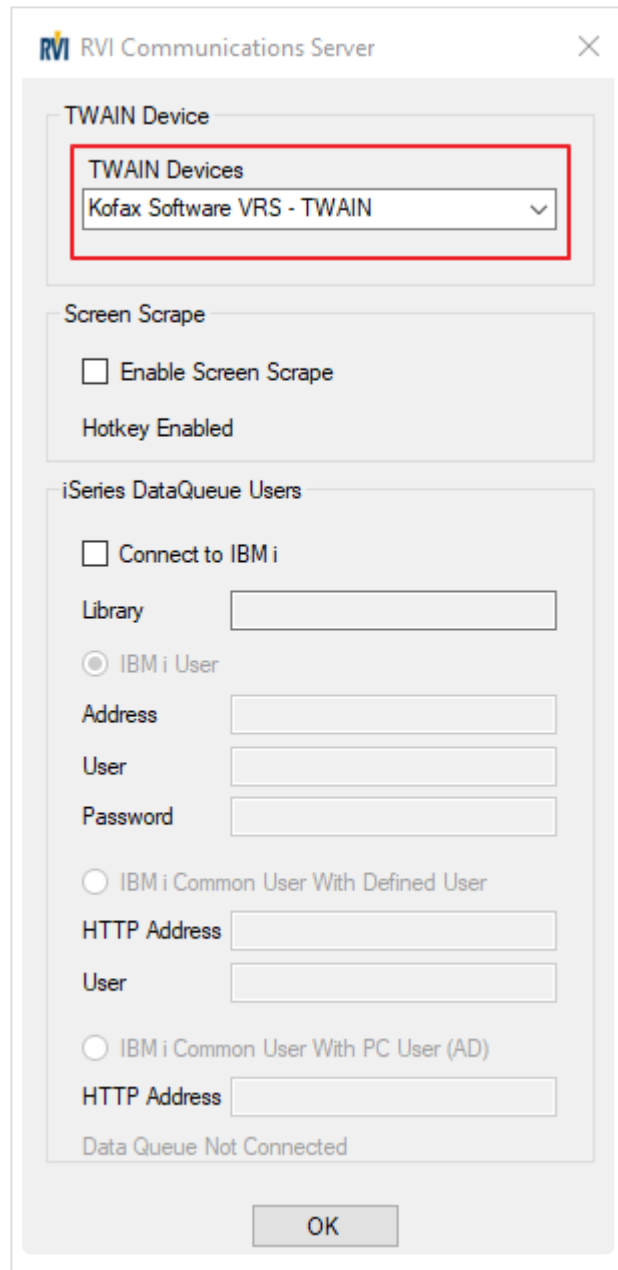
Once the communications server is installed, it will load in the pc system tray. It is recommended that you add RVI Communications Server to Windows startup applications.

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.

15.1.16. Setup SSL Configuration for IBMi

The HTTP SSL configuration is outlined in:
HTTP SSL

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.*

  - 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 >

```
System Control File Maintenance Screen          (c)Copyright RVI 1992, 1999
                                                        SYS005FM/FORMAT1

            This Program Allows You To Maintain Control File Information.


            To View A List Of All Control File Information Currently On File,
                    Leave The Screen Blank And Press Enter.




                        Control File Record:   SOCKPORT


                Use F5 For A Descriptive Setup Of Parameters By Function.

            Use F6 To Search The Standard Control File Descriptions By Keyword.




        F3 =Exit  F5 =Setup By Function   F1 =Help   F7 =*Z Parms   Enter =Continue
        F6 =Keyword Search
```

- Use the default port or specify the desired port number in the Description field
- Press < Enter >

```
System Control File Maintenance Screen          (c)Copyright RVI 1992, 1999
                                                        SYS005FM/FORMAT2
    Control File Record:   SOCKPORT




                Description:   8888
```

2. Start the HOST Socket

- **CALL RVSTRSOCK**
  If the socket is running, you will see the job under WRKACTJOB

```
Parameters or command
===> WRKACTJOB SBS(QBASE) JOB(RVISOCKET)
```

```
                          Work with Active Jobs

CPU %:      .0     Elapsed time:    00:00:00     Active jobs:    236


Type options, press Enter.
  2=Change   3=Hold   4=End    5=Work with    6=Release    7=Display message
  8=Work with spooled files    13=Disconnect ...
                          Current
Opt  Subsystem/Job  User        Type  CPU % Function        Status
__    RVISOCKET     MONTY       BCH      .0  CMD-RUNJVA      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 [RVI Support](#) 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 RVI 1992, 1999
                                                           CRTRVIFM/CNT100D4

                  Your Device Name:   QPADEV0001

               Device / User:    MCKENZY_____
               Mapping Types:    F  (D,Y,F,H,S,N,U,T,1,2,3)
            Spool File Viewer:   N  (Y=GUI Viewer,
                                     N=Green Screen,
                                     P=PDF Format,
                                     T=Text)
              Image Viewer:      F
      DataQue to Socket Using Onelook, No Polling, Scanning To Viewer
            Default Printer:     _____
                Delete Code:     _  (D=Delete)


          Press F1 For Mapping Types And Image Viewer Codes Explanation
```

Now when One Look browser is opened, in the top left corner, you should see (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 Setup RVICLOUD EHLLAPI. 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

- Click **OK**
  ◦ 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.

```
This PC  >  OS (C:)  >  RVI

*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
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**
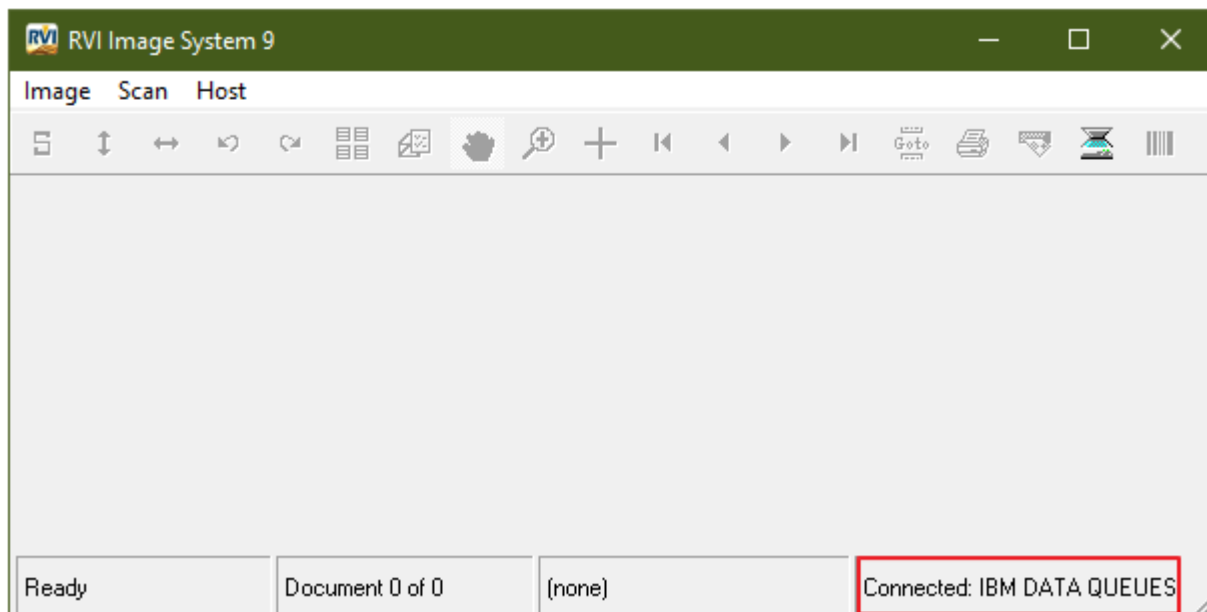
15.1.18. Setup RVICLOUD EHLLAPI

> **!** 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 Setup/Maintain IBMi Host Socket topic.

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.
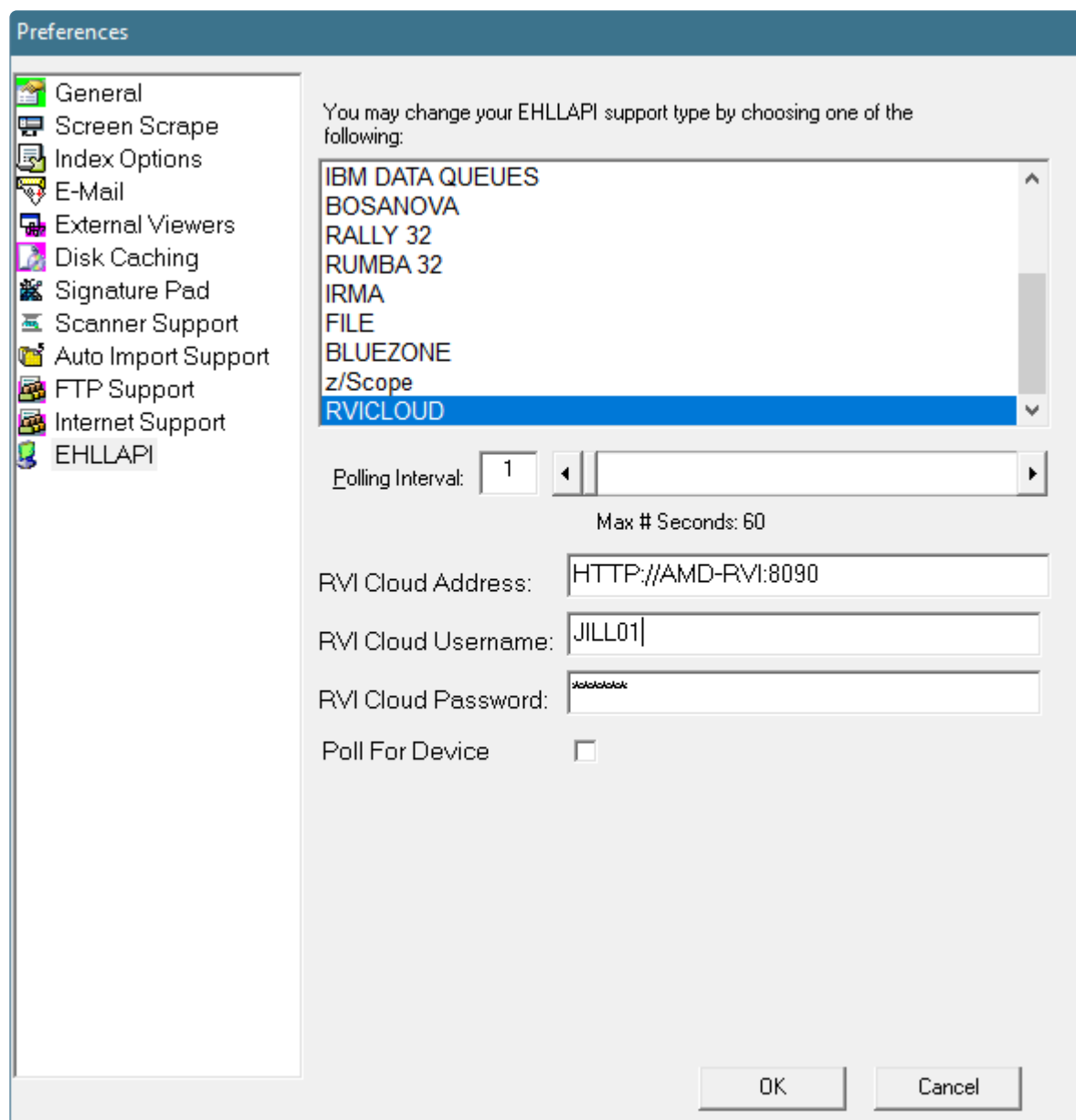
15.1.19. Setup a Common User Swap

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.
   3.  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.
  Selection or Command                          90 =Signoff
  ===> 17_
```

- Put an **X** next to Common Onelook User Swap

```
User-Specific Parameters                    (c)Copyright RVI 1992, 1999
                                                       RVUS1FM/FORMAT0

            X=Select
              _    Image Security By User
              _    Option Security By User
              _    Index Level Security By User
              _    Internet User Profiles
              _    Internet User Access (Customer Security)
              _    Routing Pop-A-Queues
              _    Screen Scrape Indexing Pop-A-Baskets
              _    Routing Workbasket Access
              _    Routing Destinations
              _    User Index Maintenance Restrictions
                   Run Parameters
              X    Common Onelook User Swap
              _    Twain Scanning Users
              _    Remove A User
```

- Press **F10** to Add User

```
Common OneLook User Swap        (c)Copyright RVI 1992, 1999
                                        RVCUO1FM/SFLCTL
 X=Select
 Position To:  _____
 X Common Usr Description                    Actual User
 _ LEN         COMMON ONELOOK USER SWAP      MONTY




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

- Enter the Common User ID (*the id must be a valid IBMi user id*) and Description.

```
Common OneLook User Swap        (c)Copyright RVI 1992, 1999
                                        RVCUO1FM/SFLCTL
 X=Select
 Position To:  _____
 X Common Usr Description                    Actual User
 _ LEN         COMMON ONELOOK USER SWAP      MONTY

             User-Specific Parameters
        Common User:   ARSCAN____
        Description:   ACCOUNTS RECEIVABLE SCANNER___

        F3 =Exit                   Enter =Continue
                                                            Bottom
 F3 =E                                        ue
```

- Press **F10** to Add Next Entry.

```
Common OneLook User Swap                        (c)Copyright RVI 1992, 1999
 Common User . . . .: ARSCAN      ACCOUNTS RECEIVABLE SCANNER RVCUO2FM/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
 Opt Sequence     Actual User




















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

- Enter a valid Onelook user id.

```
Common OneLook User Swap                        (c)Copyright RVI 1992, 1999
                                                          RVCUO2FM/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                          (c)Copyright RVI 1992, 1999
 Common User . . . .: ARSCAN     ACCOUNTS RECEIVABLE SCANNER RVCUO2FM/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**
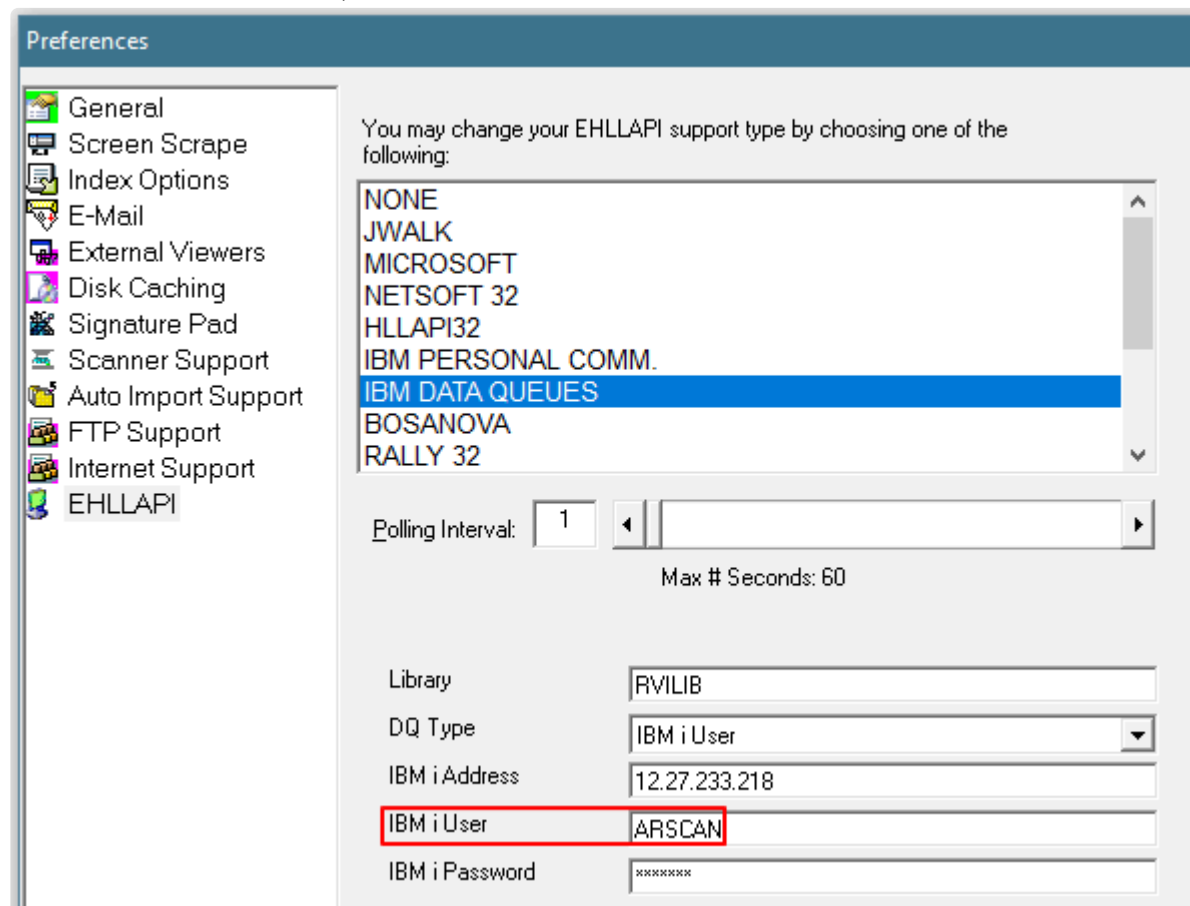
Now mulitple users can login to One Look on a single scan station without changing the IBMi User ID inside the RVI viewer.

15.2. Contact Real Vision Software

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