



1ACCESS Quick Guide

July 2021

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Getting started

About this Guide

This guide is composed of four main sections:

Getting Started, 1Access Basics, 1Access Inquiry, and 1Access Indexing.

The navigating and viewing material discussed in 1Access Basics is common to both the inquiry and indexing interfaces.

	<p>In this guide, some screen captures of buttons and drop down menus have been enhanced to improve their printing and on-line viewing qualities. Specifically, screen captures illustrating menu and toolbars were manipulated so that all their elements appeared to be in active mode at the same time. In actual use, these elements might never be active at the same time as in the combinations shown.</p>
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Requirements

Minimum requirements to run 1Access software

- PC running Windows XP, 7, 8.1 or Linux Desktop
- At least 1Gb of RAM
- Ethernet card
- Java Runtime, current version
- Adobe® Reader® or Adobe® Acrobat® Standard or Professional

To fax document images:

- 1FAX from 1Image Software Inc.

To email attachments of document images:

- 1FAX which supports server-based emailing
- 1MAIL basic server based emailing client
- Any third party email utility program that uses a print driver

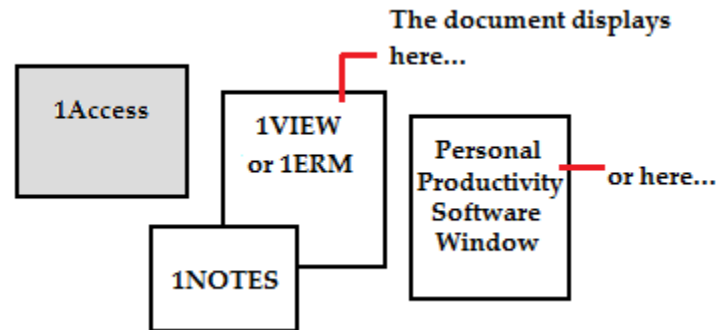
Some background about 1Access

A comprehensive application

1Access is a *comprehensive* application that you can use from Windows, Macintosh and Linux desktops to both *index* document images and content document files and to *inquire* on image, content documents, Text (Reports), and templated 1ERM (Enterprise Report Management) files. You can view (both in the original format and in the converted PDF format) print, fax, and email these documents without leaving the 1Access program.

In certain situations the user can select documents to be converted to PDF format. Convertible formats include TIF, PCL and text files. If the conversion utility is not installed on the 1MAGE server this option is not available.

Although 1Access is a standalone application, it also works hand in hand with the with the 1VIEW and 1ERM viewers, with the 1NOTE annotation utility, and with proprietary applications like MS Word, Excel and Adobe.



- 1VIEW displays scanned or faxed images (.tif file formats) and templated 1ERM data.
- 1ERM displays untemplated 1ERM (text/report) data.
- Proprietary software applications display content document files (otherwise known as **“Other” files**) sent from Windows Explorer to 1Access for indexing. 1Access can index these type documents through its Browse and Index function.
- 1NOTE displays as a narrative note companion to 1VIEW, to 1ERM, and to content document files during inquiry.

Indexing with 1Access

To index document images, open a batch or queue of unindexed images in 1VIEW and then associate indexing data with each image. Index single or multi-page documents or locate a previously indexed image and add an unindexed image to it as an additional page.

Use 1Access, Windows Explorer and the Browse function of 1Access to index content document files created in proprietary applications like Microsoft Word, Excel or Adobe. 1Access opens a copy of the file in the application in which it was created when you retrieve it.

Text or ASCII documents associated with 1ERM templates are never manually indexed. Instead, these documents—typically reports—are auto-indexed through 1MAGE process packet management.

Append a note to an image or content document file at indexing time using the inquiry session interface; during inquiry, use 1NOTES, the 1MAGE narrative note companion, to attach additional notes. Note: Because 1ERM files are auto-indexed, you can only append notes during inquiry.

Inquiring with 1Access

To inquire on a document, present 1Access with your search criteria and then it creates a hit list of files whose indexes match your search criteria. From this

list of documents, gather any number or kind of images into virtual folders **that you create “on the fly” for your inquiry.**

Depending on the class of document to which they belong, the images that comprise these virtual folders display in 1VIEW, 1ERM, or in a proprietary application window. (See table below)

Class of document	Viewer Name
1ERM document	1ERM
Image	1VIEW
Other	In the window of the application in which it was created (if the application is resident on the PC).
Templated 1ERM	1VIEW

1Access Basics

Navigating

Before you begin using 1Access inquiry or indexing, be sure that you are comfortable navigating 1Access.

Menu bars, Toolbars, and the “Previous” and “Next” buttons are elements that are common to both indexing and inquiry sessions and provide access to different forms. These forms may be navigated in an identical manner in both session interfaces.

Forms

1Access uses three separate forms to organize document image information in both indexing and inquiry sessions. These forms are Categories, Types and Keys. In an Inquiry session, these forms allow users to make their queries as broad or as specific as they wish.

In an indexing session these forms allow users to index their documents using pre-established types and keys. The following section provides a brief discussion of how to navigate 1Access using these forms.

Categories

Categories contain groupings of one or more type codes. A type code may be present in one or more Categories.

To

Do this

Select a category	<ul style="list-style-type: none"> Place the mouse pointer on your chosen category and click.
-------------------	--

To	Do this
	<ul style="list-style-type: none"> • Use the up or down arrow (↑ or ↓) to move the highlight. • Type the first letter of the item you wish to select. If more than one category begins with the same letter, continue entering the same letter until your choice is highlighted.
Move from Categories to Types	<ul style="list-style-type: none"> • Double click a single category. • Click the Next button. • Press Alt + e. • Highlight category and hit the 'Enter/Return' key.

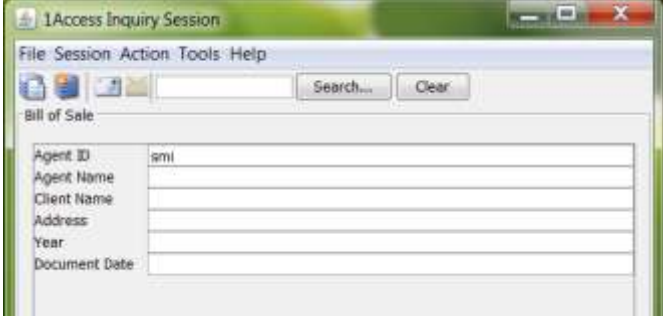
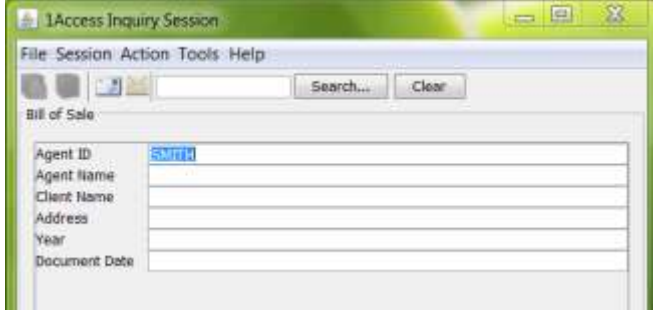
Types

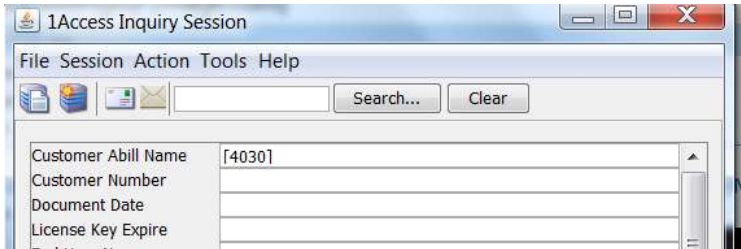
Individual documents are organized into document types. The types form reveals all of the defined types for the selected category(s).

To	Do this
Select a single document type	<ul style="list-style-type: none"> • Place the mouse pointer on your chosen type and click. • Use the up or down arrow (↑ or ↓) to move the highlight. • Type the first letter of item you wish to select. If more than one document type begins with the same letter, continue entering the letter until your choice is highlighted.
<i>Inquiry session only</i> Select several types	<ul style="list-style-type: none"> • Hold down Ctrl while selectively clicking on individual items. • To de-select one item, click a second time to remove the highlight (while still holding down Ctrl). • To select a range, click the first item, depress Shift, and click the last item.
<i>Inquiry session only</i> Select all types	<ul style="list-style-type: none"> • Press Ctrl+ a. • Right click your mouse and chose 'select all'.
Move from types to keys	<ul style="list-style-type: none"> • Double click a single type. • Select a type and click the Next button. • Select a type and press Alt + e for Next

Keys

Keys are predefined fields used to uniquely identify a specific document.

To	Do this
<p>Populate an active field</p>	<ul style="list-style-type: none"> Type your entry and press Enter; your entry will display in uppercase when you exit the field.  <p>Figure 1</p>  <p>Figure 2</p>
<p>Move from one field to another</p>	<ul style="list-style-type: none"> Press the up or down arrow (↑ or ↓). Press Tab. Click in another field.
<p>Date Fields</p>	<ul style="list-style-type: none"> Use the shortcut 't' in a date field, to populate 'today's date'. If you enter the month and date and go to the next field, it will assume the current year. For example, 0311 would translate into 03/11/15 in a date field.

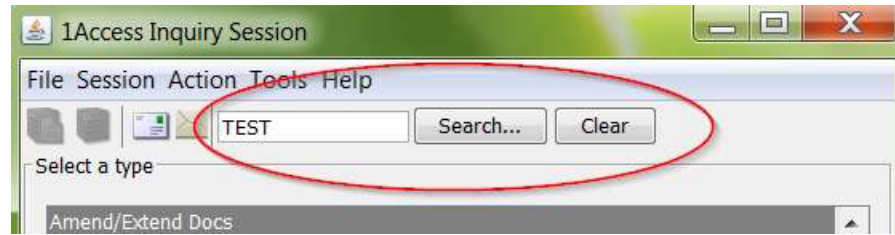
To	Do this
<p><i>Inquiry session only</i> Inquire on a range of key data (for any numeric <i>without</i> a decimal point)</p>	<p>Separate each data element with a colon, for example, 1000:3065.</p> <p>If you have defined a date key using a conversion formula such as D2/ or D4/, 1IMAGE displays a slash to separate each element, defaults to the current year if no year is provided, and displays either two or four digits when representing the year.</p> <p>If you are entering a range of dates within the current year, use a month and day designator and omit the year; if you are entering a range of dates for prior years, use the year designator as well. For example, if the conversion is D/2 and no year is provided, 0101:0131 becomes 01/01/<yy current year>:01/31/<yy current year>; if the conversion is D/4 and the years are provided, 010115:013115 becomes 01/01/2015:01/31/2015.</p>
<p><i>Inquiry session only</i> Inquire on several data elements at the same time</p>	<p>Separate each data element with a comma; for example, 068913,468297 or Washington, Lincoln or CO, MA. Do not enter a space after the comma. 1Access returns results on any data element it finds.</p>
<p><i>Inquiry session only</i> Inquire on a single data element made up of more than one character string</p>	<p>Separate each string with a space; for example, Abraham Lincoln. Both strings must be found for 1Access to return results. If only Abraham was searched, any document with Abraham as an index key would appear in the hitlist.</p>
<p><i>Inquiry session only</i> Inquire on an image master number (if known)</p>	<p>Enter the image master ID in between brackets in any index key field. If you have permission, the image will appear. For example: [4030]</p>  <p>The screenshot shows a window titled "1Access Inquiry Session" with a menu bar (File, Session, Action, Tools, Help) and a toolbar with icons for file operations and a search field. The search field contains the text "[4030]". Below the search field are several input fields with labels: "Customer Abill Name", "Customer Number", "Document Date", and "License Key Expire".</p>

Search All

Search All allows a user to inquire based on a single character string. The hitlist is populated with all documents where the character string matches the index data, regardless of the category, type or index field.

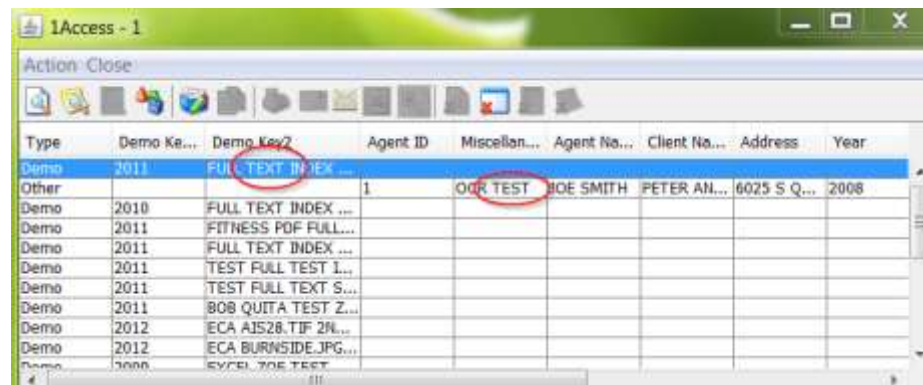
Follow these steps:

1. Enter a character string and select search to execute.



Note: There is no key validation or ranges accepted for this field.

2. This will return a hitlist where the character string of data matches ANY index key field.




3. Retrieve any document from the hitlist to view.

Using key validation and cross-referencing to populate your index keys

To help you define your index keys in inquiring or indexing, 1Access uses key validation and inverted cross-referencing.

Important

Key validation and cross-referencing are *only* available if:
 Your 1IMAGE Administrator has set up *both* validation and cross-reference files in 1ADMIN or IM100.
 You have enabled Key Validation in 1Access Inquiry Tools



Key validation is a simple data comparison activity. When key validation is enabled, 1Access passes index key data to 1IMAGE and 1IMAGE determines if the data that it is passed matches the model that is defined.

For example, if the defined model is “6N” (six numeric characters), and 1Access passes “1900070” to 1IMAGE, 1IMAGE passes the message “<key data>failed validation” back to 1Access because 1900070 is 7N rather than 6N.

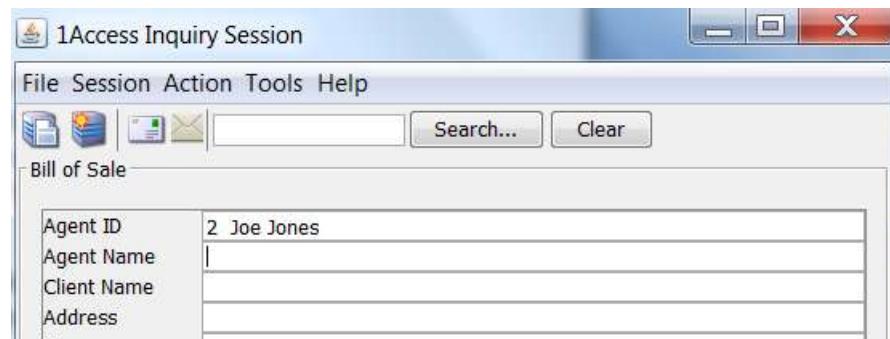
Inverted cross-referencing is a feature that allows you to employ a lookup table to **help you when you don’t remember a name, its spelling, or its code**. Inverted cross-referencing is a feature that is only available if Validation XREF establishes file or programmatic cross-referencing in Key Code Maintenance (IM100S).

Remember that inverted cross-referencing is only as reliable as is the data in the file it calls. This means that if a list of vendors is *two months old*, cross-referencing will not find the name of the vendor who came on board *one week ago*. When using cross-referencing, be sure to implement a procedure that ensures up-to-date, consistent, record maintenance.

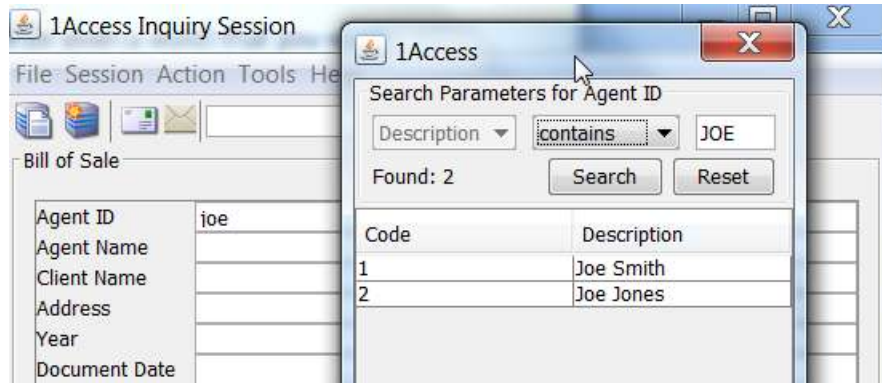
When you want to refine your search

Sometimes you can use a small piece of information, like a single word, to refine your search for an index key. If cross-referencing is defined in IM100, when you supply a word in an index key field, 1Access either will populate the field or will display a list of codes whose descriptions contain the word.

For example, if you enter Jones in the field and Jones occurs only *once* in a cross-reference file, 1Access will populate the field with Joe Jones.



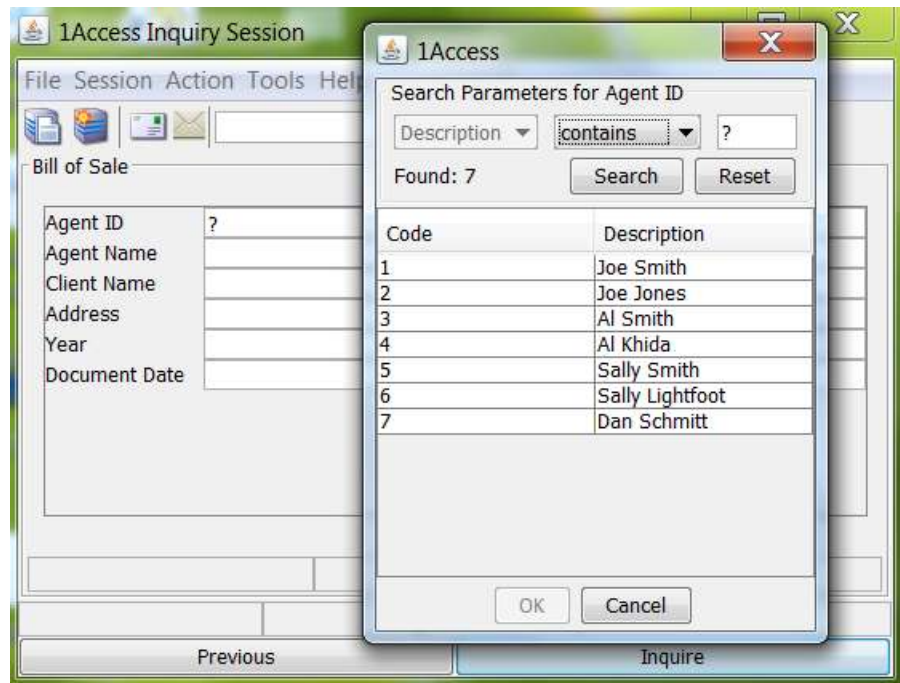
On the other hand, if you enter Joe, 1Access displays *two* search parameters for you to select from because Joe occurs two times in the cross-reference file.



When you need a "look-up" table

Sometimes you can't remember a name (or even a *word*) that you want to use to populate an index key field, but you might say to yourself, "I'll recognize it when I see it." In that case, initiate a 1Access search for *all* records in a particular Cross-reference file.

1. Enter a question mark (?) in the index key field and press Enter. A Search Parameters window displays every record it finds.



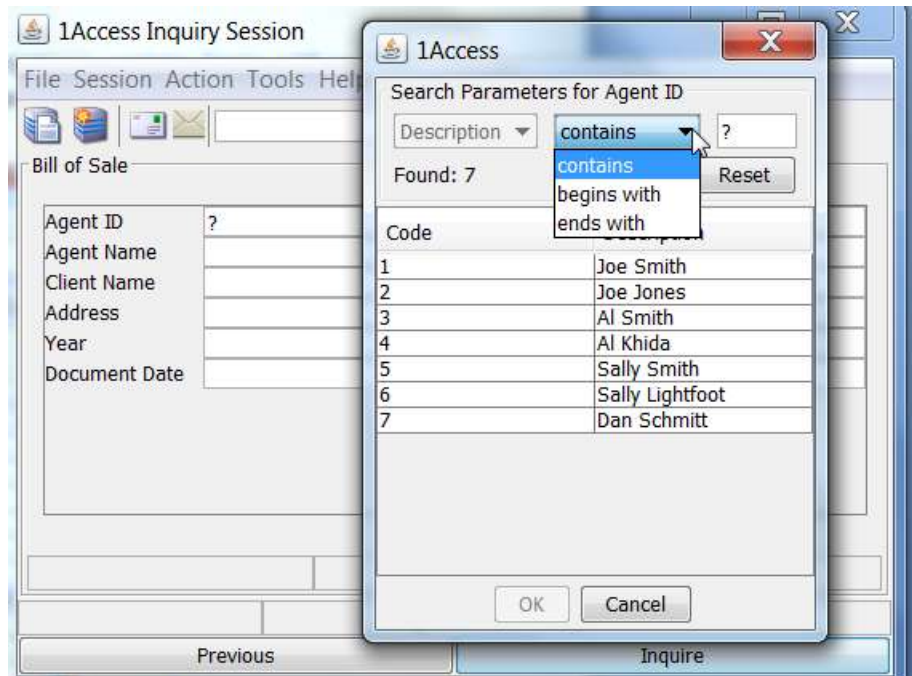
Do the following:

Use the drop down list to select *contains*, *begins with* or *ends with*. (If you do not make a selection, 1Access behaves as if you selected *contains*.)

Enter a character string in the parameter field. The parameter field is not case *sensitive*—you can use either upper or lower case when you search. A *character string* is a sequence of letters or numbers—not necessarily a word—that occurs next to each other and may be manipulated as a group.

1. Click Search or press Enter.

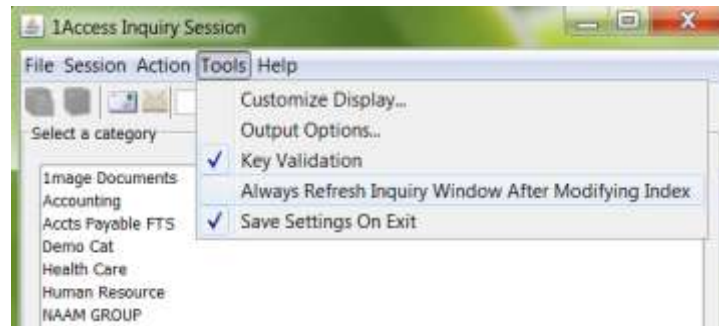
1Access displays all codes whose descriptions *contain*, *begin with* or *end with* the string you entered. If your search was unsuccessful, click Reset to re-display and try again.



2. Scroll the Search Parameters list. To populate the index key field, either select a code and click OK or double-click your selection.

When you want to reuse your Inquiry

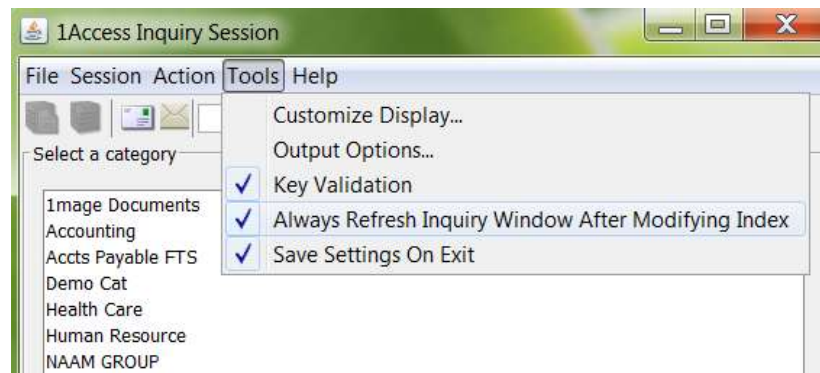
Once you have the inquiry results you want, you may wish to reuse the inquiry results to modify index work on more than one document. By default, the "Always Refresh Inquiry Window After Modifying Index" is not checked and the Inquiry results window closes each time index information for a document image has been modified.



This means that you must re-enter the same inquiry information again in order to reopen the Inquiry results window and select the next document image. This can be cumbersome if there are multiple documents that can be derived from the same inquiry and need to be modified.

The “Always Refresh Inquiry Window After Modifying Index” option has been added to keep the Inquiry results window active and to refresh the information displayed in this window as needed after index information has been modified.

To enable “Always Refresh Inquiry Window After Modifying Index” click this option from the Options menu. A check displays next to this item indicating that the “Always Refresh Inquiry Window After Modifying Index” option is enabled.



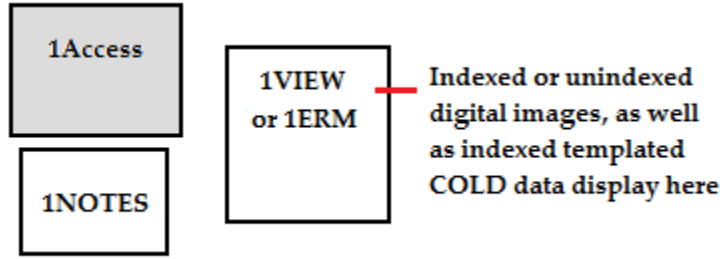
Viewing

Images stored in the 1IMAGE database may be viewed using either 1View, 1ERM, or in a proprietary application window. The view that is used depends on the class of document image being viewed.

Document image and templated 1ERM files

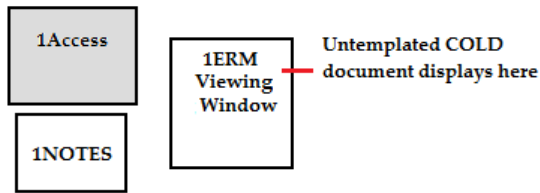
Both indexed and *unindexed* document images, as well as templated 1ERM images, display in the 1VIEW viewing window. You can move,

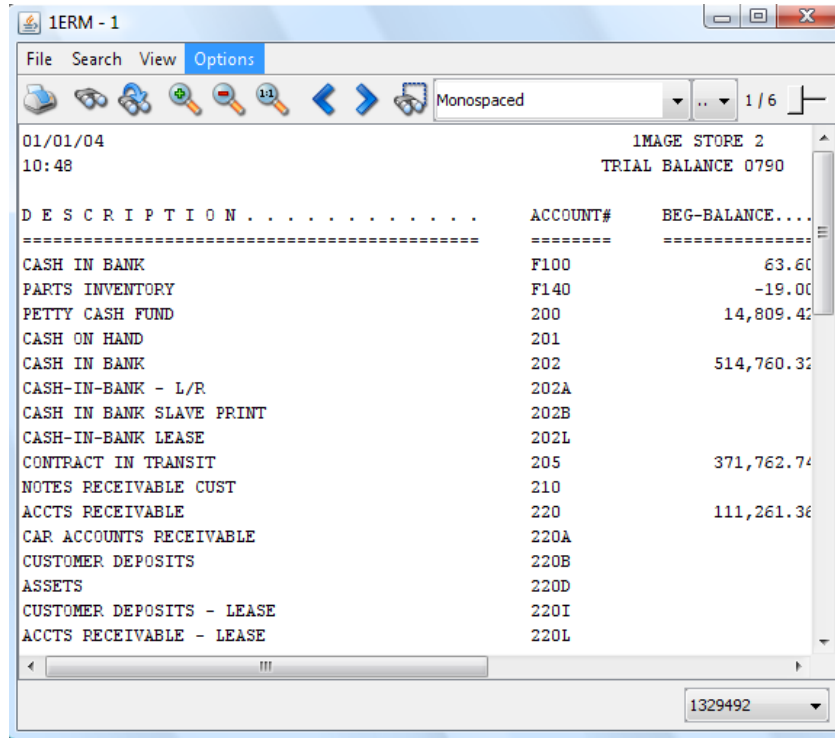
rotate, or magnify the images you see in 1VIEW. All document images and templated 1ERM files belong to Class "I" (Image).

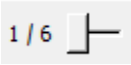



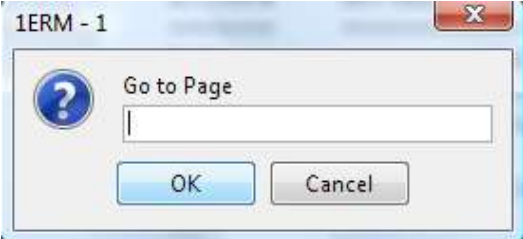

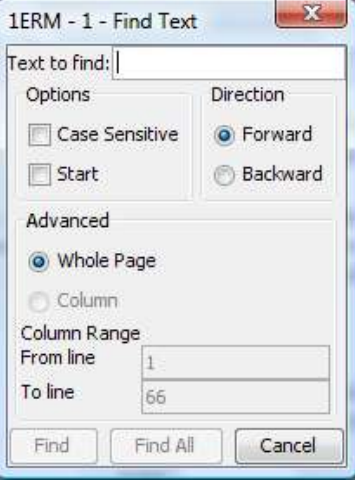

1ERM documents


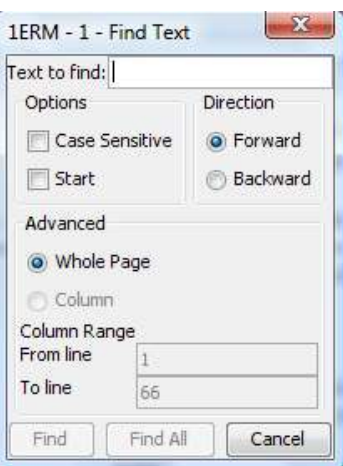
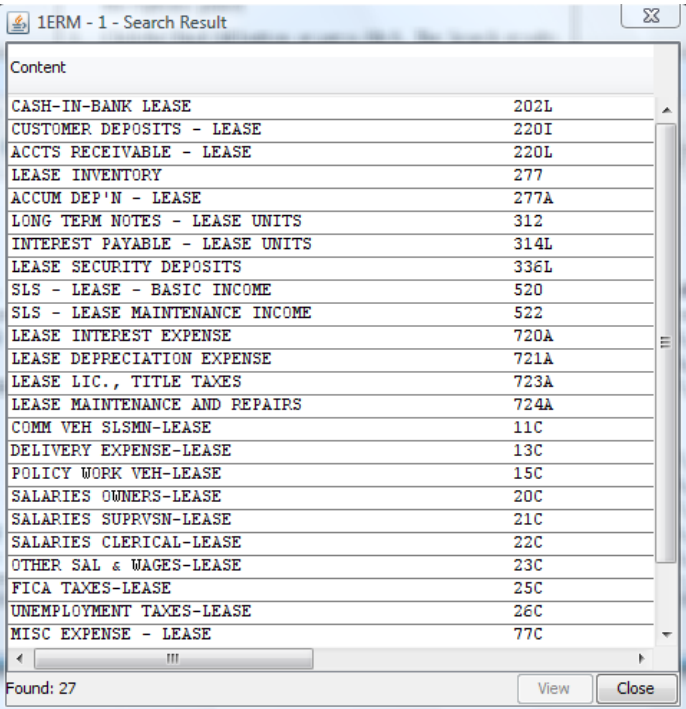
ASCII or 1ERM documents—such as general ledger and payroll reports, transaction histories, customer invoices, statements and purchase orders—that are automatically captured and indexed, display in a 1ERM viewing window when you retrieve them. 1ERM document files belong to Class "C" (1ERM).

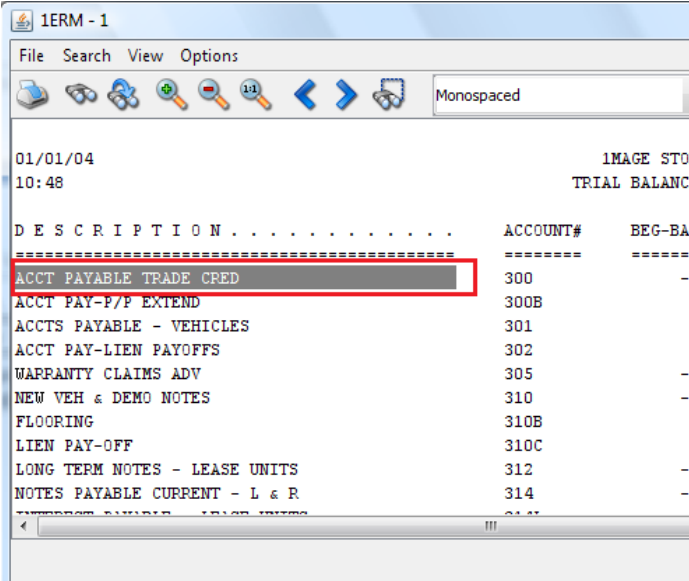

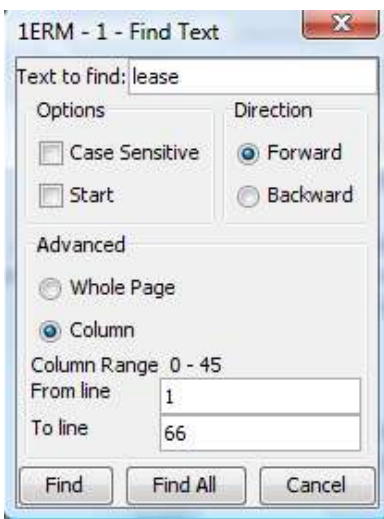


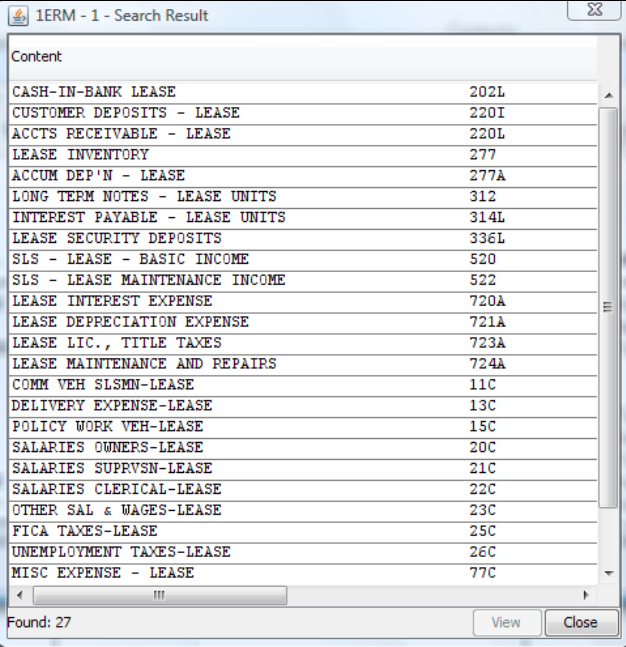


To	Do this
Move to a new page	 <p>To move forward or backward a page at a time Click the sidebar once either in front of the selection bar or behind the selection bar or use the 'page up/page down' buttons. To move forward or backward more than a page at a time slide the selection bar to the right or to the left.</p>

To	Do this
Go to a specific page	<p>Click the 'Go to Page' icon. </p> <p>The Go to page window displays. Enter a page number and press Enter or click OK.</p> 
Search the entire document for a character string and display it occurrence by occurrence	<p>Click the Find button . The 1ERM Find Text dialog box displays.</p> 
<p>Note This search is <i>not</i> case-sensitive.</p>	<ol style="list-style-type: none"> 1. At Text to find, type a character string. 2. Select Case Sensitive and/or Search from start of file from the Options panel. 3. Select whether to search Forward or Backward from the Direction panel. 4. Click Find. The search proceeds—by your choice—either forward or backward, the highlight stopping at the first occurrence of the character string. 5. To find next occurrence of the character string, click the Find Again button .

To	Do this
Generate a list of character string occurrences	<p>Click the Find button . The 1ERM Find Text dialog box displays.</p>  <p>1. At Text to find, type a character string.</p> <p>2. Select Case Sensitive and/or Search from start of file from the Options panel.</p> <p>3. Click the Find <u>A</u>ll button or press Alt A. The Search results screen will display.</p> 

To	Do this
Conduct a search of text within a defined column range.	<ol style="list-style-type: none"><li data-bbox="646 241 1177 273">1. Highlight the column you wish to search in. <li data-bbox="646 913 1307 987">2. Click the Find button . The 1ERM Find Text dialog box displays. <li data-bbox="646 1533 1112 1564">3. At Text to find, type a character string.<li data-bbox="646 1585 1323 1648">4. Select Case Sensitive and/or Search from start of file from the Options panel.<li data-bbox="646 1669 1258 1701">5. The Column in the Advanced panel will be selected.<li data-bbox="646 1711 1128 1743">6. Enter the lines you wish to be searched.<li data-bbox="646 1753 1258 1785">7. Click Find All. The Search results screen will display.

To	Do this
	

Content document files

Content document files belong to Class “O” (Other). Class “O” image master are linked to files that will be opened by their native applications. Probably the most common content document files that you will retrieve using 1Access will be those you created in Microsoft Excel, Microsoft Word, or Adobe. 1Access, however, treats many other types of files—such as those created in Microsoft PowerPoint, Lotus ScreenCam, Adobe Acrobat, or Adobe PhotoShop—as content document files too.

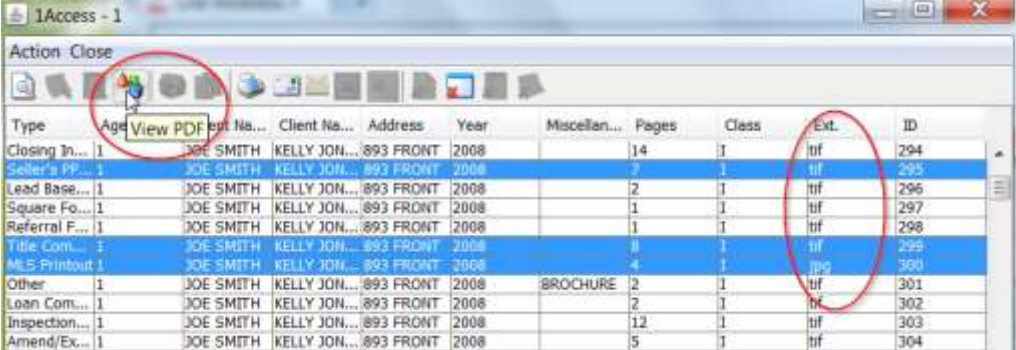
Note: Retrieval of content files currently available only on 1Access running on Windows.

When you retrieve a content document file, 1Access caches the file in IMAGEHOME/IMAGE.URL on your image server and calls the program **with which the file’s** extension is associated on your PC. If Word is loaded on your PC and is associated with a .docx extension, then when 1Access is used to inquire on a document that was created in MSWord, the document will open in Word.

If no program is associated with the file extension, or if the source application is not resident on your PC, the file will be cached but not opened. This situation might occur if someone else created and

indexed the file and you did not have the source application loaded on your PC when you attempted to view it.

When converting a document from its original format to pdf format you must have previously downloaded Adobe Reader to your desktop to view the pdf. Multiple documents can be selected to be converted to pdf format and they will open together as a single pdf document. Files types that can be converted to pdf include: .tif, .jpg, .pdf, .txt, ghosted COLD and COLD. If you combine non-compatible file types, an error message is placed in the combined pdf as a page filler.



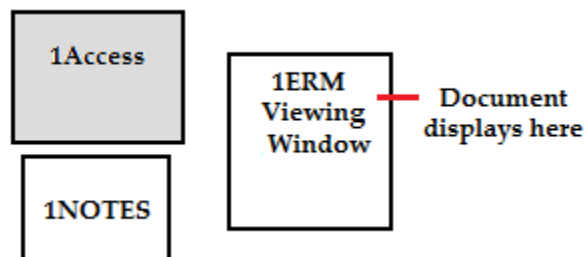
Type	Age	View PDF	Ext Na...	Client Na...	Address	Year	Miscellan...	Pages	Class	Ext.	ID
Closing In...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		14	I	tif	294
Seller's PP...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		7	I	tif	295
Lead Base...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		2	I	tif	296
Square Fo...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		1	I	tif	297
Referral F...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		1	I	tif	298
Title Com...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		8	I	tif	299
M.S. Printout	1			JOE SMITH	KELLY JON... 893 FRONT	2008		4	I	jpg	300
Other	1			JOE SMITH	KELLY JON... 893 FRONT	2008	BROCHURE	2	I	tif	301
Loan Com...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		2	I	tif	302
Inspection...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		12	I	tif	303
Amend/Ex...	1			JOE SMITH	KELLY JON... 893 FRONT	2008		5	I	tif	304

Notes

You can append a note to an image or a content document file during indexing and then use 1NOTES, the 1Access annotation companion, to read the note or to append additional notes during inquiry.

Note: Because 1ERM and templated files are *auto*-indexed, you can only append notes during inquiry.

Below 1ERM needs to change


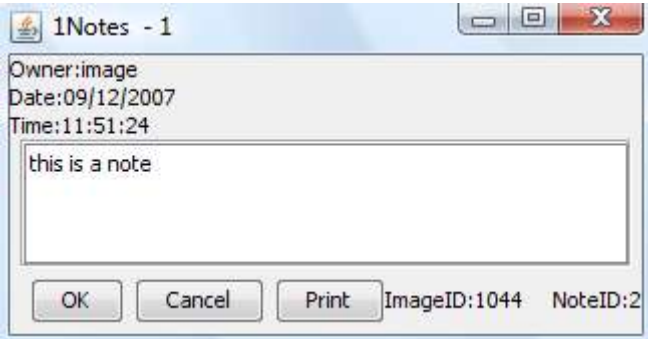


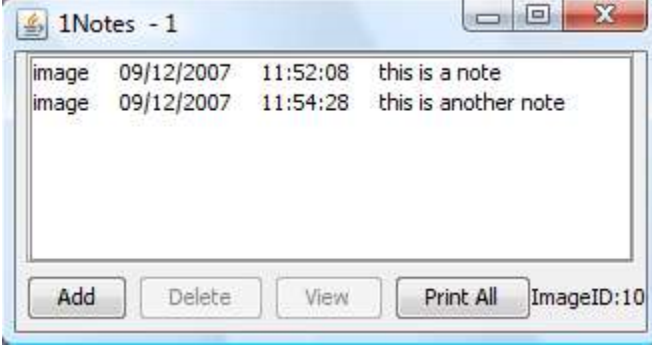
- 1NOTES will not display if the 1NOTES tag is set to "N(o)" in IM295, Defaults Value Maintenance.
- 1NOTES only opens if a single document is selected for viewing in 1VIEW or 1ERM.
- 1NOTES can be displayed without its associated document

image by clicking the  button or pressing F5.

- 1NOTES does not open automatically for content documents that open in proprietary windows.



To	Do this
Add another note	8. Click the Add button. The cursor displays in the notes area and your login displays in the Owner field. 1IMAGE records the system Date and Time the note was created. 
	9. Type the note. 

To	Do this
	<p>10. Click OK when you have finished entering the note. Click Cancel to exit 1NOTES without saving changes. Click Print to print the note.</p> <p>The note's author (Owner), the system date and time, and the first line of each note displays. Maximize the 1NOTES window to display all characters of the first line of each note.</p>  <p>Click the Delete button to delete the highlighted note. After you exit 1NOTES Inquiry, a note is archived and may no longer be edited or deleted; this is your only opportunity to edit or delete it.</p>
<p>To display previously entered notes</p>	<p>11. After 1NOTES displays, use the scroll bar to page forward or backward until you locate the note you want.</p> <p>12. Click a note to select it and press Enter.</p> <p>13. The full text of the selected note displays in the notes area. Remember, you may not edit a previously entered note.</p> <p>14. Click the Back button or press Enter to return to the 1NOTES list window.</p>

Printing

Choosing the origin of your printing function

1Access permits you to choose where you want your print functions to originate. This means that you may choose to print from locally defined printers or from server defined printers. Since these options are *not* mutually exclusive, you may choose to print from *either*. (Both options are enabled, by default, at installation.)


Note When both server and local printing are enabled, server-based printing takes precedence.

For selection of printer, page range, and number of copies when you are printing, server-based printing displays the 1Print window and local-based printing displays the Windows default print window. You may print from either an indexing or an inquiry session.

To select the origin of your printing

Go to Tools | Output Options. The Options dialog box displays. Select Local, Network, or *both* Local and Network.



	<p>We recommend that you enable <i>both</i> printer options if you want print capability for <i>all</i> classes of documents. *</p> <p>Use this option When you want to print this class of document</p>	
	Local	<p>I Image</p> <p>G Templated 1ERM</p>
	Server	<p>C 1ERM</p>
	<p>* 1Access does not manage the printing of content documents (Class O)</p>	

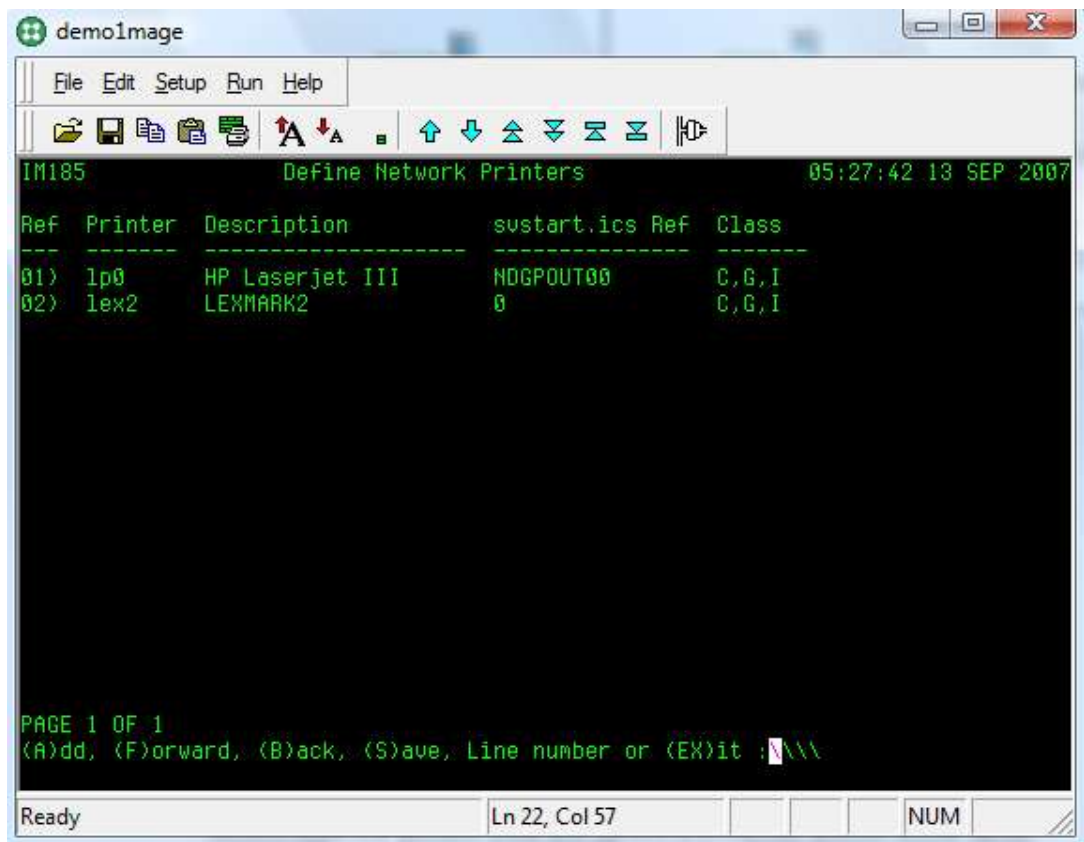
About server-based printing

Printer	Local
	<input checked="" type="checkbox"/> Server

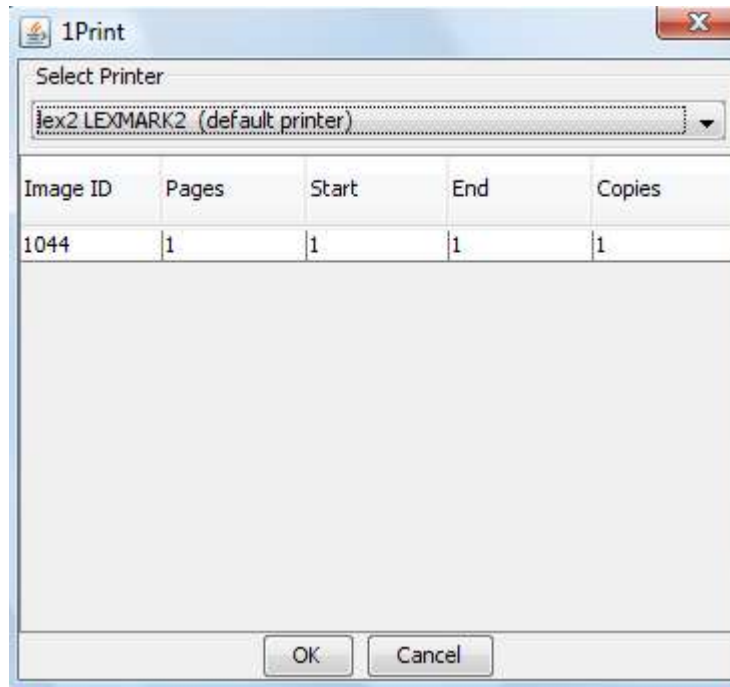
Server-based printing originates from printers that are defined on the image server as network printers.

System administrators use the 1IMAGE Maintenance function, IM185, to define these printers.

Note The same printers may also be defined as *local* printers in Start | Settings | Printers.



Notice that the printer you see defined in IM185 above is the same printer that displays in the 1Print window that follows.



To print using 1Print, populate the following fields:

Printer The default printer name displays. Use the drop down list to change the printer selection. If no printer names display in 1Print, no printers have been defined on the image server.

Page Range and copies By default, 1Print prints *every* page of *every* image you select. If you have selected one image and want to print only selected pages Place the cursor in Start Page or End Page and enter the page numbers you want to print. By default, 1Print prints one copy of all pages in the page range; to print additional copies, enter the number of copies you would like to print.

Image ID	Pages	Start Page	End Page	Copies
1266	3	1	3	1

If you have selected more than one image and want to print only selected pages Place the cursor in Start Page or End Page for each image and enter the page numbers you want to print. By default, 1Print prints one copy of all pages in the page range; to print additional copies, enter the number of copies you would like to print.

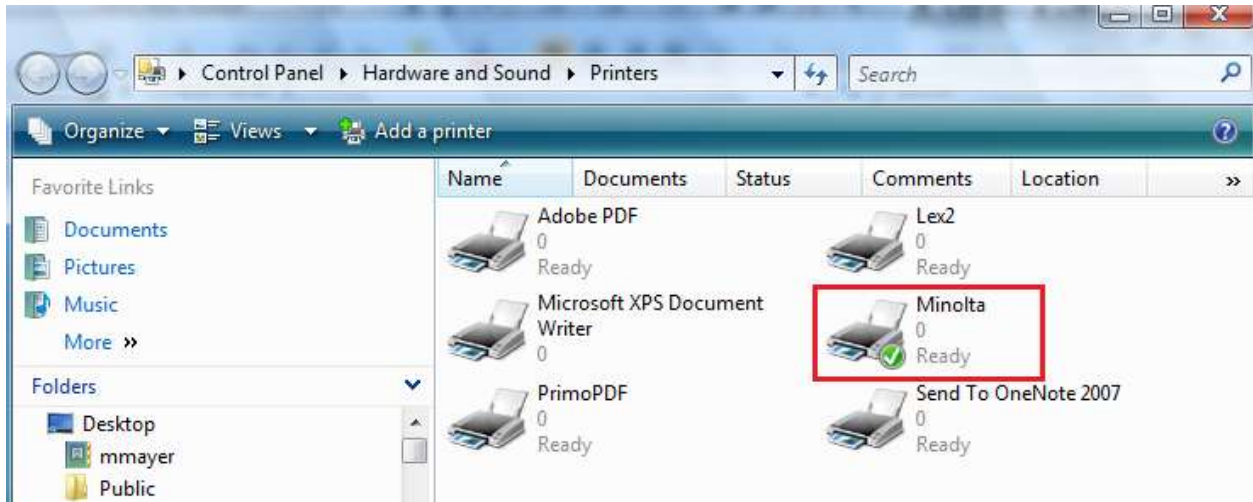
Image ID	Pages	Start Page	End Page	Copies
1266	3	1	3	1
1267	4	1	4	1

About local-based printing

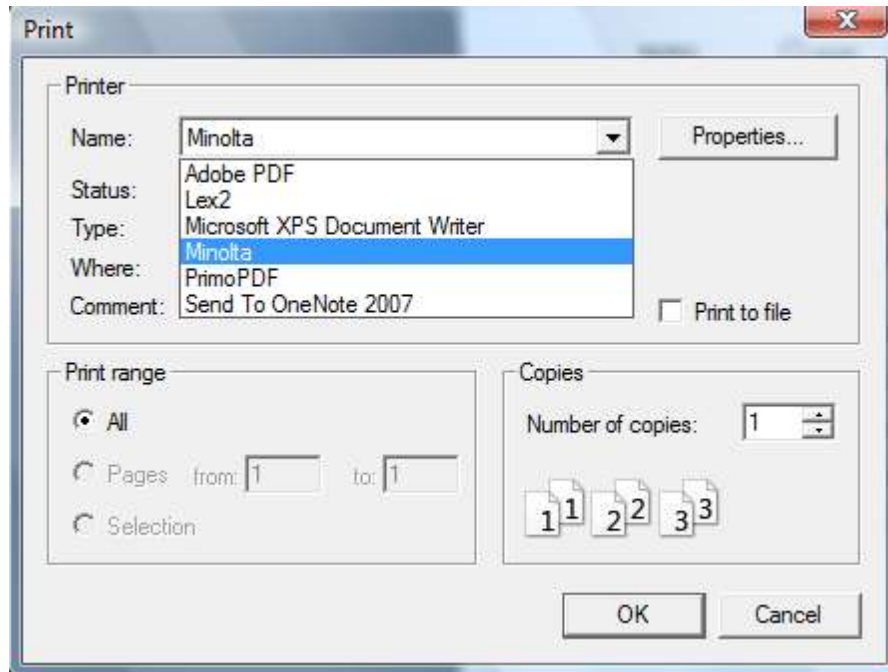
Printer	<input checked="" type="checkbox"/> Local
	<input type="checkbox"/> Server

Local-based printing is that which originates from printers defined on your PC. Sometimes these printers are directly attached to your PC and sometimes these printers are defined on other servers but shared as network printers.

Notice that the six printers defined as local printers in the example below, are also those that display in the Printer list of the Windows print window. In this example, Minolta is set as the default printer.



The same printers are also listed in the Printer list of the Windows Print window.



To print, populate the Windows Print window or your application’s proprietary print window.

How to print



If you have enabled both Local and Server-based printing in 1Access, *and* if you have printers defined on both the image server and your PC, 1Access will display 1Print when you print through the toolbar button and Windows Print window when you print through the 1VIEW print button.

From Inquiry

To print document images, templated 1ERM documents, and 1ERM documents

Note 1ERM documents may only be printed when server-based printing is enabled.

1. Select a document in the list area of the Inquiry window and click the print icon on the toolbar.
2. View the document and click the 1VIEW Print button (Classes I and G) or click the toolbar print icon (Class C).

To print a content document file (Class O)

Note You may only open one content document file at a time.

3. View the document. The source application will open if it is resident on your PC.

4. Use the print capabilities of the source application to print the document.

This means, for example, that if your content document opens in Microsoft Word, you would use File | Print to call the Word application's proprietary print window and to print the document.

From Indexing

To print unindexed document images

5. Select a batch. The first unindexed image displays in 1VIEW.
6. Do one of the following to print the image you see in 1VIEW:



If you want to print to your locally-defined *default* printer, place the focus in 1VIEW, and type Ctrl + P.

If you want to select a printer that is *not* your default printer, click the Print button in the 1VIEW window to display the Windows Print window.

Faxing

Choosing the origin of your faxing function

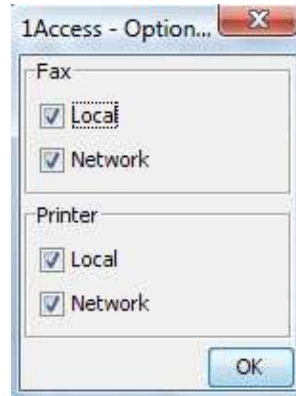
1Access permits you to choose where you want your fax functions to originate: from a fax modem installed on your PC, or from a fax modem installed on the image server. Since these options are *not* mutually exclusive, you may enable *both* options. For all platforms, both options are enabled, *by default*, at installation.

Note When both server and local faxing are enabled, server-based faxing takes precedence.

Server-based faxing displays the 1FAX window and local-based faxing displays the Windows default *print* window.

To select the origin of your fax

Go to Tools | Output Options. The Options dialog box displays. Select Local, Network, or *both* Local and Network.



Faxing from your PC

You may fax indexed and unindexed documents from your PC if a fax modem, a phone line, and 1FAX is installed.

1. Click the Print button in the 1VIEW window to display the Windows Print window.



2. Choose the Fax printer from the Printer list.

Faxing from the image server

You may fax indexed documents and fax cover sheets from the image server if a fax modem and faxing software are installed on the server.

Note You may only fax 1ERM documents if you enable server-based faxing.

1. Select a document or documents from the hit list of the inquiry window.
2. Do one of the following:
 - Click the fax button on the toolbar.
 - Select Action | Fax

The 1Access-1FAX window displays.

The screenshot shows the 1Fax window with the following fields and controls:

- Customer Information:** Customer Code (with a help icon), Customer Name, Fax Number, and Recipient.
- From:** A text input field.
- Subject:** A text input field.
- Select Cover Sheet:** A dropdown menu showing "1 DEFAULT COVER SHEET (default)".
- Table:** A table with columns: Image ID, Pages, Start, End, and Copies. The first row contains the values: 1044, 1, 1, 1, 1.
- Buttons:** Edit Memo, OK, and Cancel.

1. Configure your fax.

Code If you have set up fax phone codes in Fax-Phone Code Maintenance (IM135), you may use the cross-reference list box to select a code. The Name, Fax, and Recipient fields are automatically populated after you make your selection.

If you do not have codes set up, or if this fax is to be sent to someone whose name has not been coded, leave this field blank and populate the Name, Fax, and Recipient fields.

The data you enter will be used for a "one time" fax transmission.

Name Type a company name.

Fax Type an area code and telephone number. You may use a hyphen or parentheses to separate groups of numbers if you wish.

Depending on the requirements of your current phone system, you may need to preface the telephone number with a prefix for an outside line, a local line, or a long distance line.

If you use more than one prefix in your system, Enter the prefix here.

If you use only one prefix for all your fax numbers Enter the prefix in System Parameters Maintenance, Fax prefix (IM140).

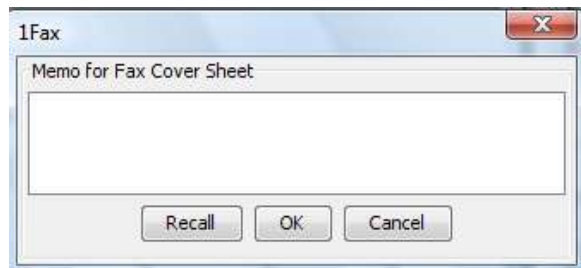
Use a comma (,) to program pauses into the fax number; for example: 9,1,9999999999.

Note: If sending a fax to an e-mail address then **enter the recipient's e-mail** address here instead of a fax number. This feature is only available on specific 1FAX packages. Contact your 1IMAGE account representative for more information on this feature.

- Recipient Type the name of the individual to whom the fax is directed.
- From Name Type the name of the person sending the fax
- Subject Type a description of the nature of the fax transmission.
- Fax Cover Sheet The Default Cover Sheet you set up in Fax Cover Sheet Maintenance (IM280) will be used for your fax transmission unless you select another cover sheet from the drop down list.
- Memo Click the Edit Memo button to display the 1Access-Fax Memo window. Type in your message, or paste text from your clipboard, and click OK.

Click the Recall Last button to populate the text area with the content of the *last* memo you sent from the current 1Access session.

Note All memo text is deleted when the Fax Memo session is exited.



- Page Range Single image
By default, 1Access faxes all pages of the selected image.

Image ID	Pages	Start	End	Copies
1044	1	1	1	1

If you have selected one image and want to fax only selected pages, Place the cursor in Start Page or End Page and enter the page numbers you want to fax.

Multiple images

By default, 1Access 1FAX sends *all* pages of *all* images selected.

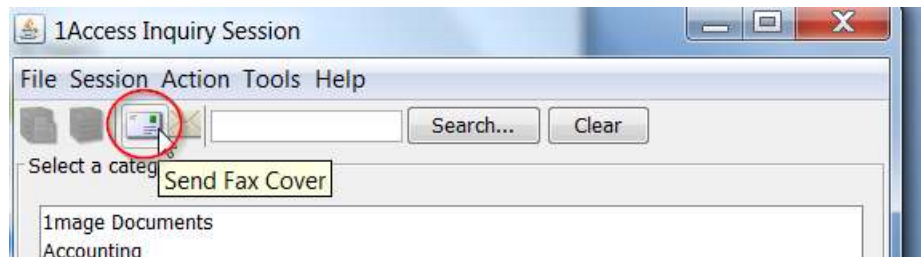
If you have selected more than one image and want to fax only selected pages Double-click on the image record. Place the cursor in Start Page or End Page and enter the page numbers that you want to fax for each image


2. Click OK to send the fax.

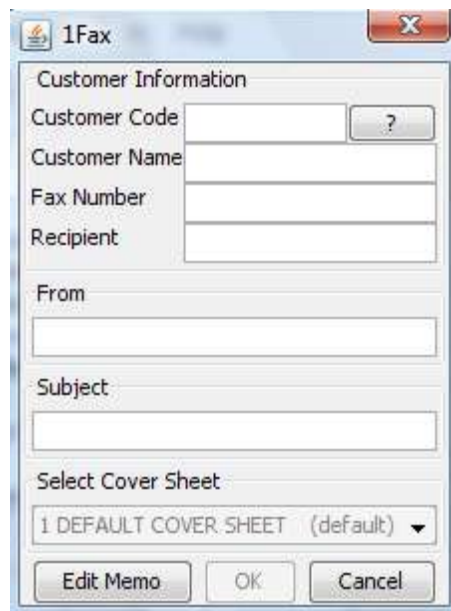
Faxing a cover sheet without an accompanying image

If 1FAX is installed on the image server, you may send a Fax Cover Sheet without an accompanying image.

1. Do one of the following from the main screen:



- Click the Fax Cover Sheet toolbar button 
 - Press Ctrl + F
 - Select Action | Send Fax Cover
2. The 1Access-1FAX window displays. Populate the fields as if you were faxing an image.



Emailing with 1MAIL

1Access allows users to email documents through the server based email client, 1MAIL. Server settings are set by the administrator in 1ADMIN.

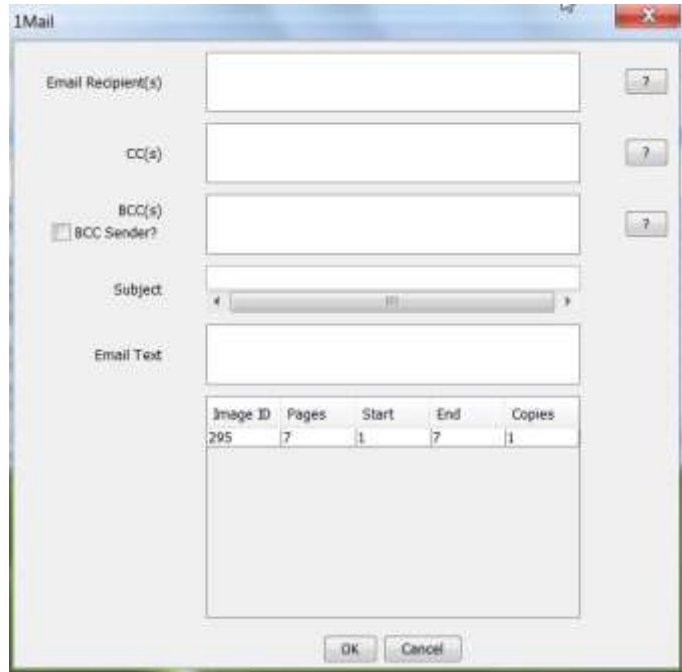


Follow these steps to email document(s) to an email address:

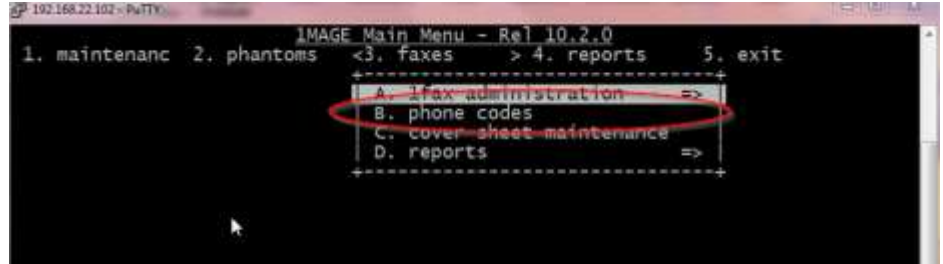
1. From the hitlist, select the image(s) you want to email and click the 1MAIL icon.

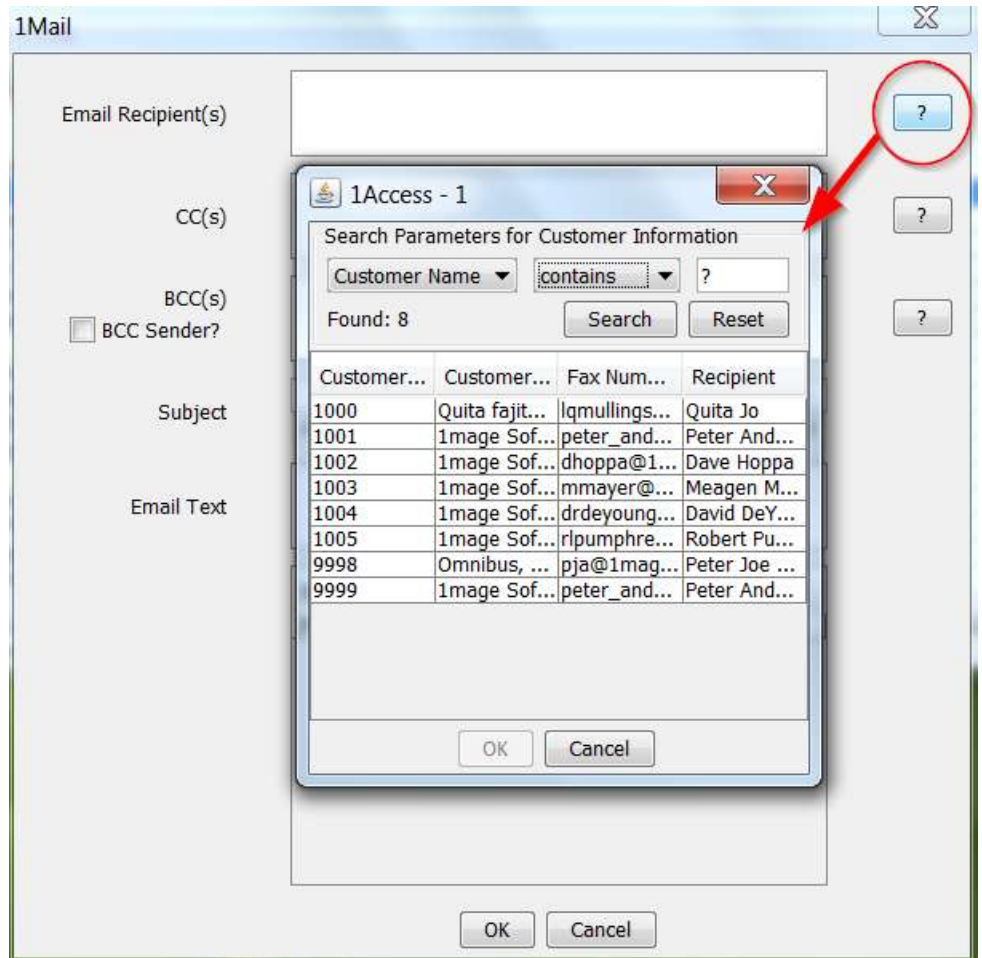


2. Populate the fields with the appropriate data; email recipients is the only required field. The images' ID, pages and number of copies sent will be shown at the bottom of the screen.



Users can use the '?' button to access a directory; directory is setup by 1IMAGE administrator in the 'Phone Code' sub-menu. User selects contact from list (or multiple by holding down CTRL) and selects 'OK'.

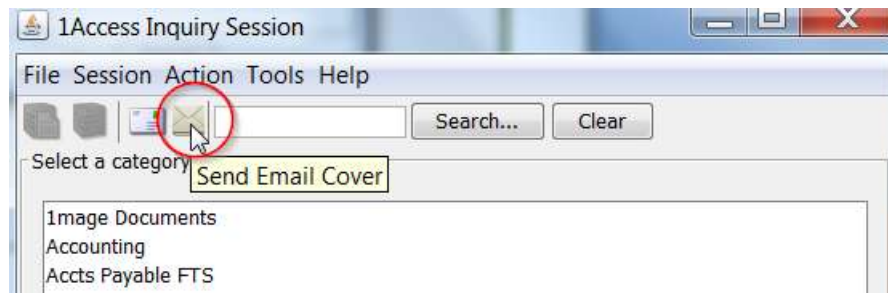





Emailing a cover sheet without an accompanying image

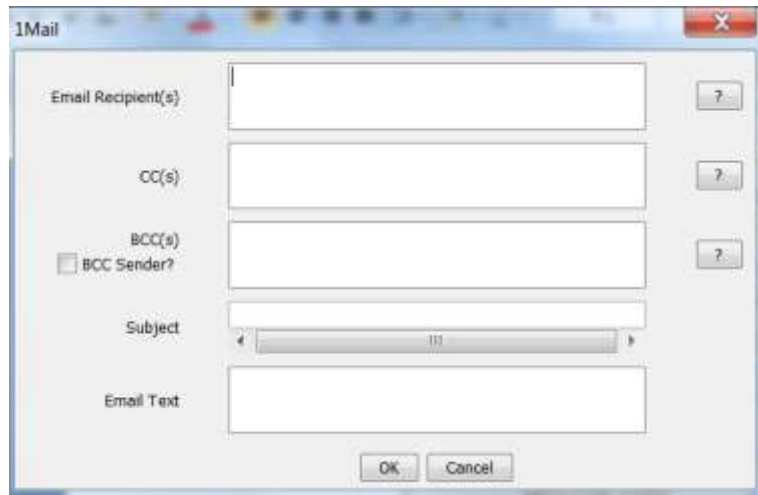
You may send a Email Cover Sheet without an accompanying image.

Do one of the following from the main screen:



- Click the Email Cover Sheet toolbar button 
- Press Ctrl + M
- Select Action | Send Email Cover

Once selected, a pop-up box will appear. Fill out the appropriate fields and select ok.



Finding your 1Access release number

To find your 1Access version number for troubleshooting purposes, go to Help | About 1Access. The About 1Access window displays the version of 1Access that you are currently using and the hostname or IP address of the Image Server to which you are connecting.



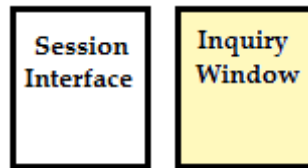
1Access Inquiry

By default, 1MAGE gives *all* 1Access users access to an *inquiry* session.

Before any document may be saved on the image server, it must be indexed (either manually or automatically) using a *unique* combination of type and index keys that belong only to it. When you look for the document using the *same combination* of data elements, that document will be the *only* document that you retrieve.

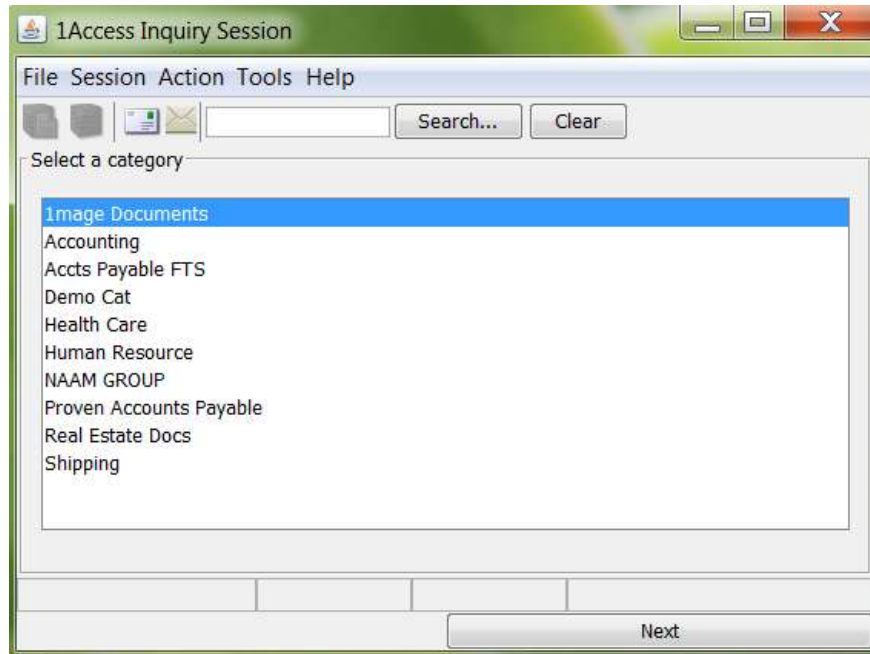
Most of the time, though, you won't be able to provide every indexing element; instead, you'll probably use a smaller number of more general elements. The tradeoff is that the fewer data elements you provide, the more images 1Access will identify as probable matches to your inquiry. Be assured, however, that as your familiarity with 1Access and your archived images grows, you will become increasingly adept at providing a practical combination of data elements that will yield the smallest possible number of probable matches.

1Access *Inquiry* uses two windows: a session interface and an Inquiry window. Enter your search criteria into the session interface and create your virtual folder from the “hit list” displayed in the Inquiry window.



The inquiry session interface

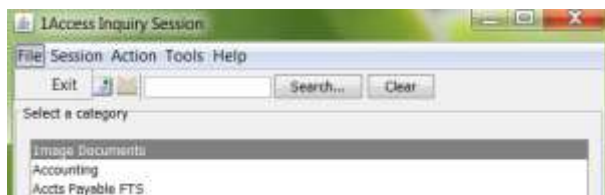
The 1Access inquiry session interface displays the following elements: a menu bar, a toolbar, and a status bar at the bottom of the interface. It also contains a Previous and a Next button that allows navigation between the three inquiry forms.



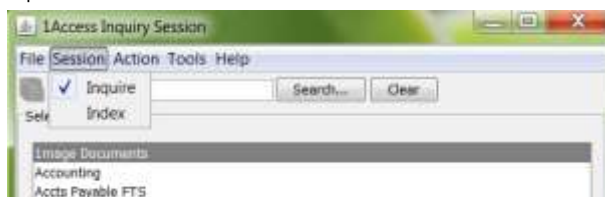
Menu bar

The inquiry menu bar displays six menu options: File, Session, Action, View, Options, and Help.

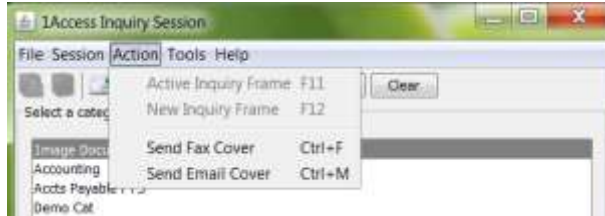
File Use File to exit 1Access.



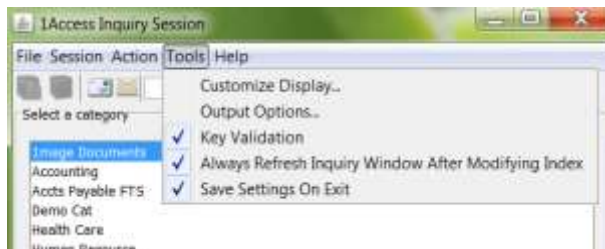
Session Use Session to toggle between an inquiry session and an indexing session. You must have indexing privileges to see the indexing option enabled.



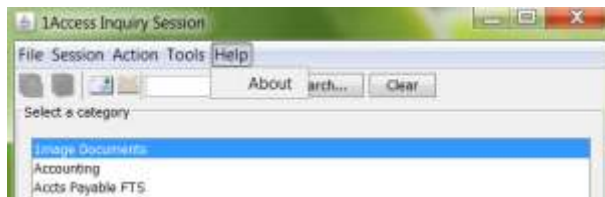
- A**ction Use Action to display qualified images in either the active inquiry window or in a new inquiry window. If faxing/emailing is available on your platform, use Action to send a fax/email cover sheet without an accompanying image.



- T**ools Use Tools to Customize display, to select local and/or server faxing and printing (Output Options), to toggle Key Validation, to toggle the Refresh Inquiry Option, and to save settings on exit.



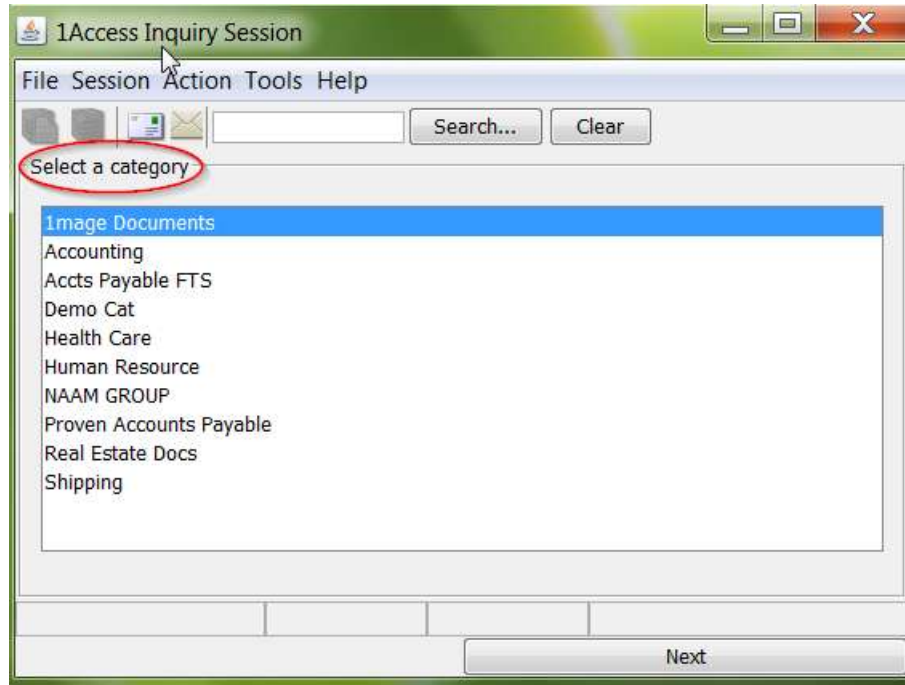
- H**elp Use Help to view Help topics and the 1Access release level.



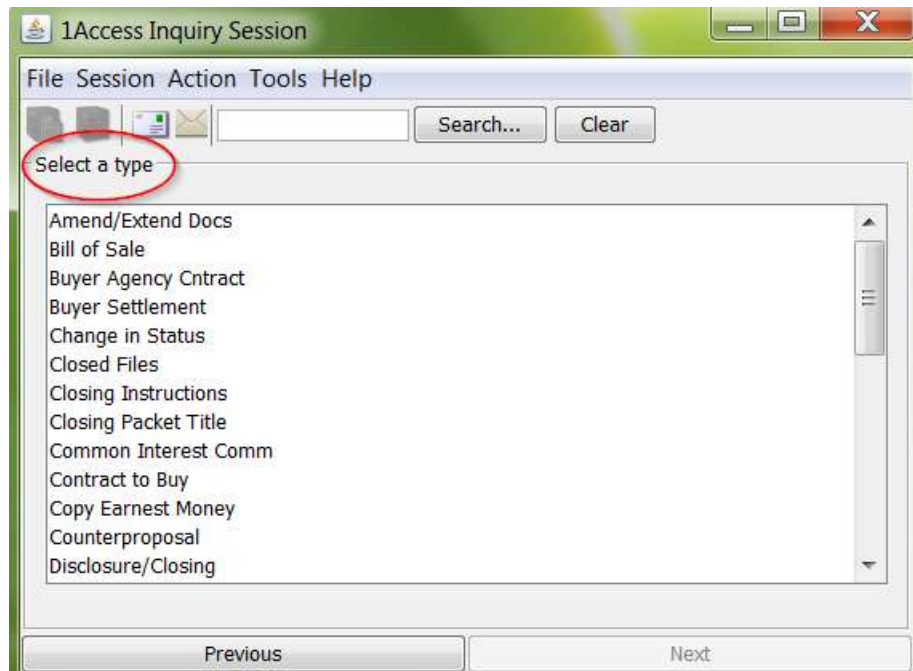
Forms

1Access inquiry has three Forms: one for Categories, one for Types, and one for Keys. These forms are accessed using the Previous and Next keys.

By design, no categories are selected when you open a 1Access inquiry session; depending on the nature of your search, you may select one category, several categories, or all categories.

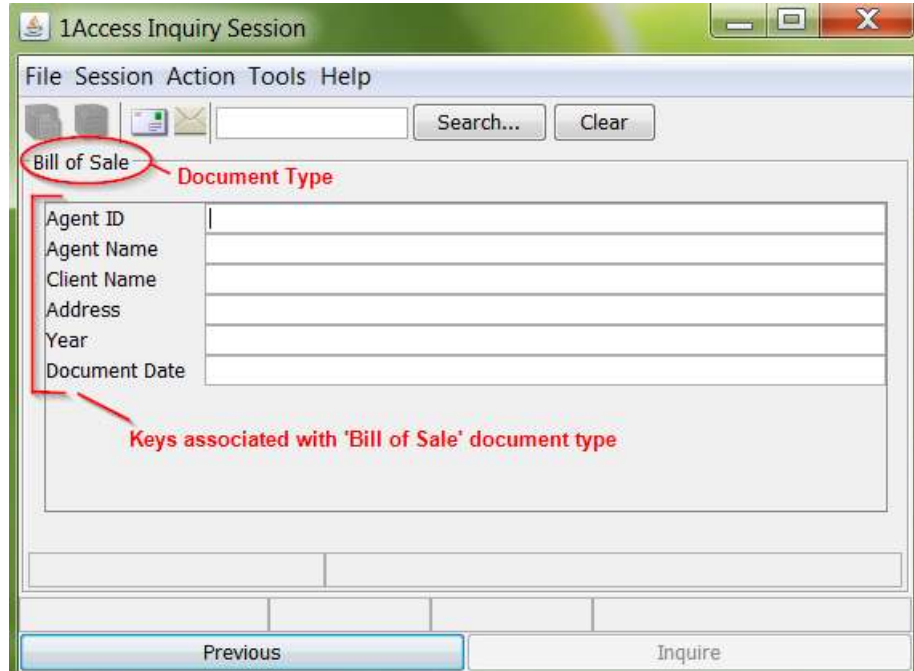


When you open the Types form, only the document types associated with the categories that you selected will display. In an inquiry session, you may select more than one document type at a time.



All keys associated with the selected categories and types display on the Keys form. The associated index key area displays all index keys associated with the document type or types you selected.

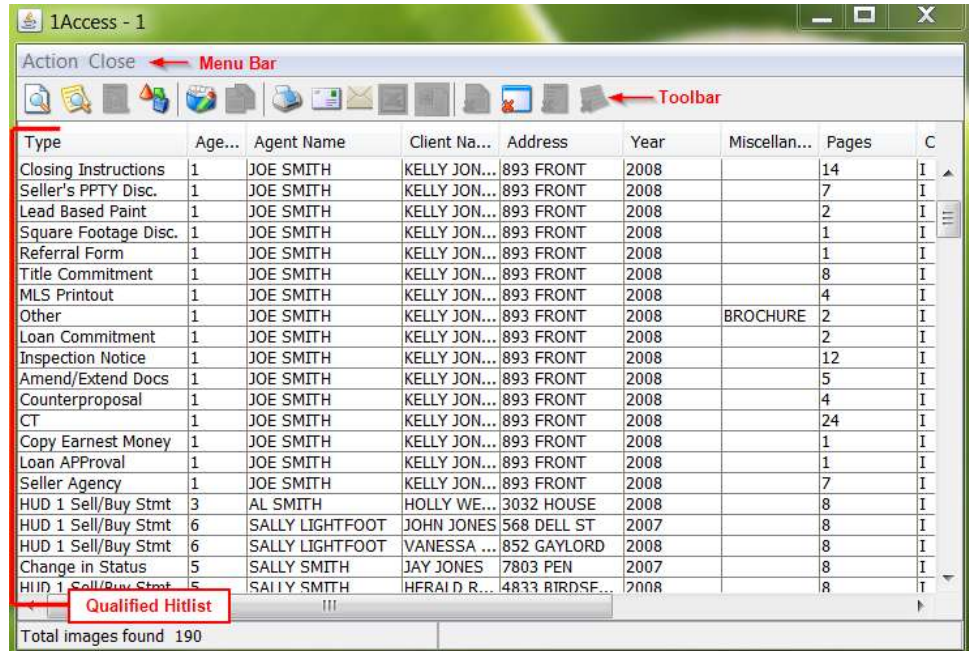
Note: When a single document type is selected, the name of the type displays on the form just above the first index key. If more than one type is selected, this area remains blank.



The Inquiry window

Use the list in the Inquiry window to select a *specific* document image to view, print, fax, email or modify.

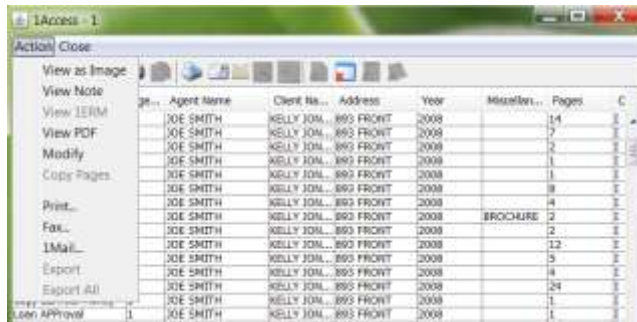
The Inquiry window displays the following elements: a menu bar, a toolbar, and a qualified hitlist. If the list of documents exceeds the space available, a vertical scrollbar displays.



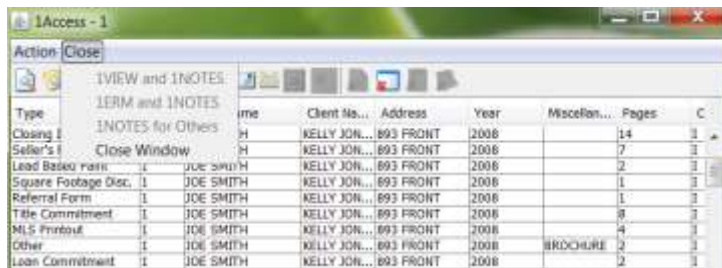
Menu bar

The menu bar displays two menu options: Action and Close.

Action Use Action to view an image or note, to view a templated image as 1ERM, to view PDFs, to modify an image, copy pages or to print, fax (if faxing is installed) or email.

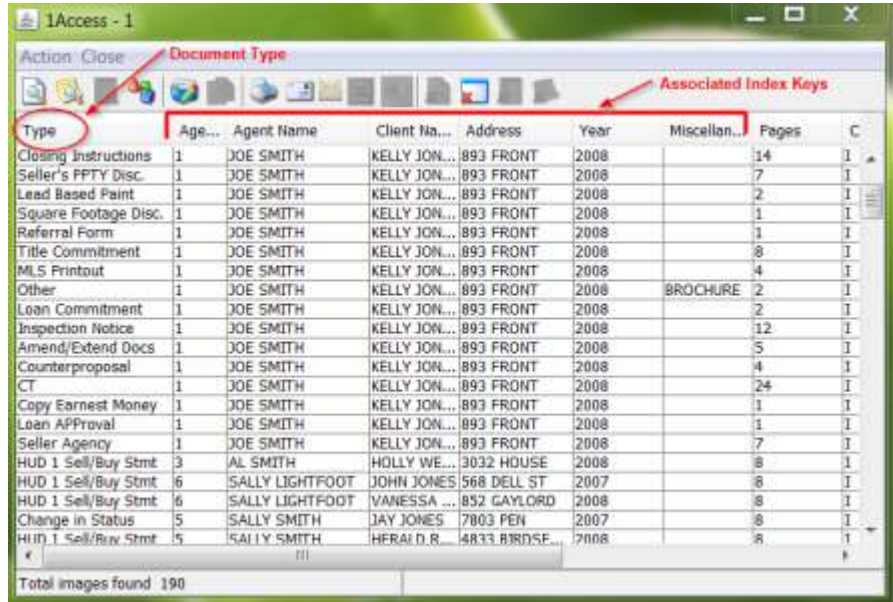


Close Use Close to close 1VIEW and 1NOTES, 1ERM and 1NOTES, 1NOTES for Others, or close window.



Qualified Hitlist

The qualified hitlist displays the document type in the first column, and the Master ID, number of pages, class of document, and extension in the last four columns. Any index keys associated with the selected document type(s) comprise the intervening columns (the columns are compressed in the example below).



To navigate the hitlist, do one of the following:

To

Do this

Select one item in the list	Click on any cell in your chosen row to select it.																					
	<table border="1"> <thead> <tr> <th>Type</th> <th>Document C...</th> <th>File Type</th> <th>File Description</th> <th>File Size</th> <th>Indexed D...</th> <th>Pages</th> </tr> </thead> <tbody> <tr> <td>Demo Types</td> <td>0</td> <td>DOC</td> <td>UNITED STATES CONSTITUTION</td> <td>96,256</td> <td>10/19/2005</td> <td>1</td> </tr> <tr> <td>Demo Types</td> <td>0</td> <td>PDF</td> <td>WINCLIENT INSTALLATION M...</td> <td>344,314</td> <td>10/19/2005</td> <td>1</td> </tr> </tbody> </table>	Type	Document C...	File Type	File Description	File Size	Indexed D...	Pages	Demo Types	0	DOC	UNITED STATES CONSTITUTION	96,256	10/19/2005	1	Demo Types	0	PDF	WINCLIENT INSTALLATION M...	344,314	10/19/2005	1
Type	Document C...	File Type	File Description	File Size	Indexed D...	Pages																
Demo Types	0	DOC	UNITED STATES CONSTITUTION	96,256	10/19/2005	1																
Demo Types	0	PDF	WINCLIENT INSTALLATION M...	344,314	10/19/2005	1																
	To de-select, click the selection a second time to remove the highlight.																					

To Do this

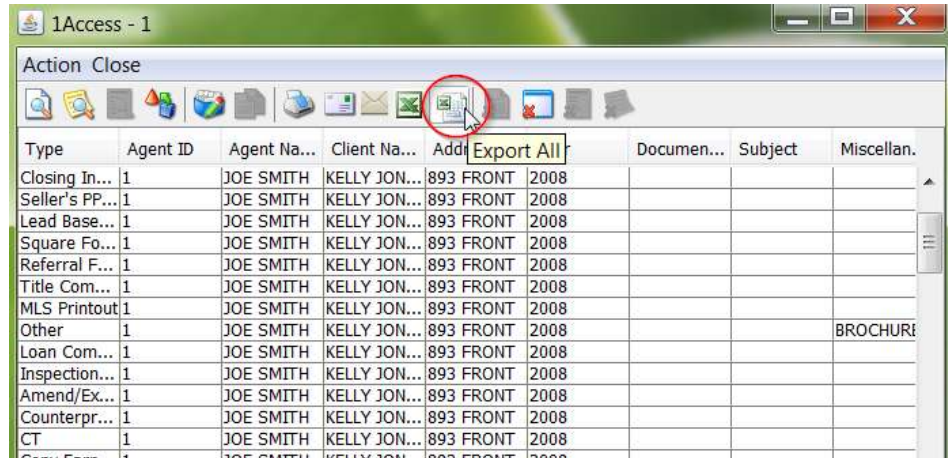
<p>Select more than one item in the list</p>	<p>Hold down CTRL while selectively clicking on individual items.</p> <table border="1" data-bbox="479 304 1334 472"> <thead> <tr> <th>Type</th> <th>Document C...</th> <th>File Type</th> <th>File Description</th> <th>File Size</th> <th>Indexed D...</th> <th>Pages</th> </tr> </thead> <tbody> <tr> <td>Demo Types</td> <td>O</td> <td>DOC</td> <td>UNITED STATES CONSTITUTION</td> <td>96,256</td> <td>10/19/2005</td> <td>1</td> </tr> <tr> <td>Demo Types</td> <td>O</td> <td>PDF</td> <td>WINCLIENT INSTALLATION M...</td> <td>344,314</td> <td>10/19/2005</td> <td>1</td> </tr> <tr> <td>Demo Types</td> <td>O</td> <td>HTM</td> <td>CLOCK HTML</td> <td>7,112</td> <td>10/19/2005</td> <td>1</td> </tr> <tr> <td>Demo Types</td> <td>O</td> <td>MPEG</td> <td>BILL GATES MOVIE</td> <td>1,716,681</td> <td>10/19/2005</td> <td>1</td> </tr> <tr> <td>Demo Types</td> <td>O</td> <td>WAV</td> <td>BUGLE CALL - REVEILLE</td> <td>206,457</td> <td>10/19/2005</td> <td>1</td> </tr> </tbody> </table> <p>Or SHIFT if you want to select a consecutive group of images.</p> <table border="1" data-bbox="479 556 1334 787"> <thead> <tr> <th>Type</th> <th>Agent ID</th> <th>Agent Na...</th> <th>Client Na...</th> <th>Address</th> <th>Year</th> <th>Documen...</th> <th>Subject</th> <th>Misce</th> </tr> </thead> <tbody> <tr> <td>Closing Instructions</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Seller's PPTY Disc.</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Lead Based Point</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Square Footage Disc.</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Referral Form</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Title Commitment</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>MLS Printout</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Other</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td>BROC</td> </tr> <tr> <td>Loan Commitment</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Inspection Notice</td> <td>1</td> <td>JOE SMITH</td> <td>KELLY JON...</td> <td>893 FRONT</td> <td>2008</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>To de-select, click the selection a second time to remove the highlight.</p>	Type	Document C...	File Type	File Description	File Size	Indexed D...	Pages	Demo Types	O	DOC	UNITED STATES CONSTITUTION	96,256	10/19/2005	1	Demo Types	O	PDF	WINCLIENT INSTALLATION M...	344,314	10/19/2005	1	Demo Types	O	HTM	CLOCK HTML	7,112	10/19/2005	1	Demo Types	O	MPEG	BILL GATES MOVIE	1,716,681	10/19/2005	1	Demo Types	O	WAV	BUGLE CALL - REVEILLE	206,457	10/19/2005	1	Type	Agent ID	Agent Na...	Client Na...	Address	Year	Documen...	Subject	Misce	Closing Instructions	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Seller's PPTY Disc.	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Lead Based Point	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Square Footage Disc.	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Referral Form	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Title Commitment	1	JOE SMITH	KELLY JON...	893 FRONT	2008				MLS Printout	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Other	1	JOE SMITH	KELLY JON...	893 FRONT	2008			BROC	Loan Commitment	1	JOE SMITH	KELLY JON...	893 FRONT	2008				Inspection Notice	1	JOE SMITH	KELLY JON...	893 FRONT	2008			
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<p>Move a column to a new location</p>	<p>Click the header of the column you want to move and drag the header to its new location.</p>																																																																																																																																													
<p>Move a single image/row to a new location</p>	<p>Select single line item with mouse and move item up or down to new location. This image will be viewed in this new order when combined with other images or exported.</p>																																																																																																																																													
<p>Sort columns</p>	<p>Click the column heading to sort in ascending or descending order.</p>																																																																																																																																													

Exporting the Hitlist Data

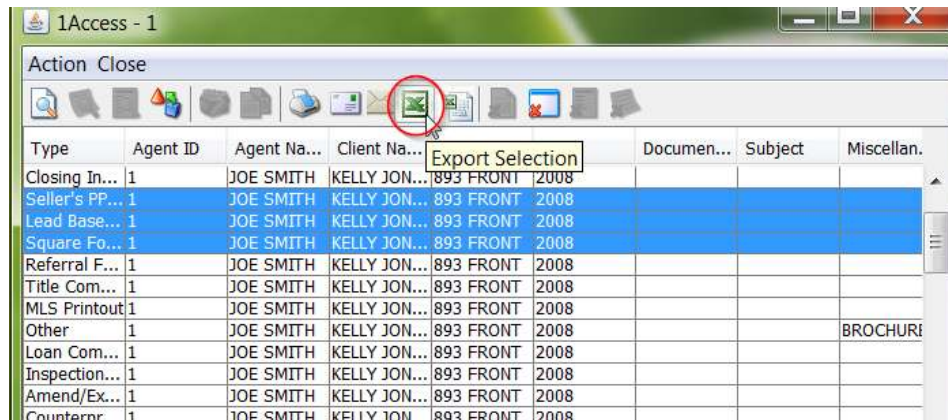
Should a user want to export the data for further processing, the user can choose the entire hitlist or select individual files to be exported into Microsoft Excel.

Note User may only export if columns have not be rearranged. Icons will become greyed out once rearranging has occurred.

Exporting entire Hitlist: Once the hitlist is displayed, use the icon 'Export All' to send to Excel; user will have to save the Excel file before viewing the spreadsheet.

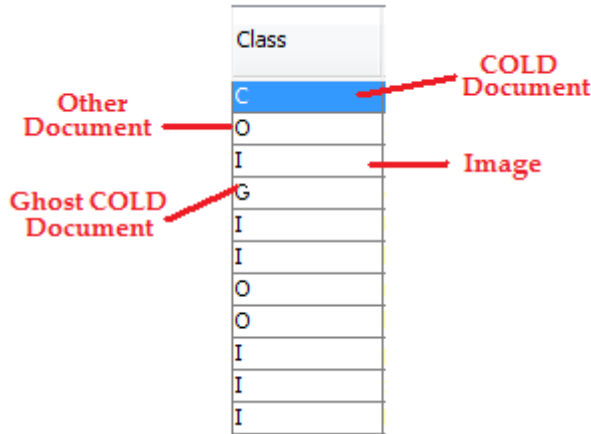


Exporting Selection: Select the file(s) you wish to export, use the icon 'Export Selection' to send to Excel; user will have to save the Excel file before viewing the spreadsheet.



Identifying the class of archived documents

1Access displays abbreviations for four classes of archived documents in the qualified hitlist: images (I), 1ERM documents (C), templated 1ERM documents (G), and Other or digital content (O) documents.



Each class of document will open in its appropriate viewer.

Class of document	Viewer Name
1ERM document	1ERM
Image	1VIEW
Other	In the window of the application in which it was created (if the application is resident on the PC).
Templated 1ERM	1VIEW

Initiating an inquiry

To initiate a 1Access inquiry

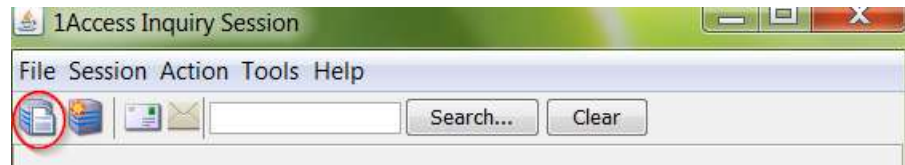
See also 1Access Basics, Navigating 1Access

Use the Search all function to perform a search by entering a character string of data to produce the hitlist.

OR

1. In a 1Access inquiry session, select one or more Categories and go to the Types form. Select only those categories whose associated document types are ones that you want to view.
2. Select one or more document Types and go to the Keys form. Again, select only document types that match your search criteria.
3. In the Keys form, populate at least one of the index key fields associated with your chosen type(s) and do one of the following:
 - Press F11

- Press Tab to move the cursor through the index key fields
- Return/Enter will initiate an inquiry
- Select Action | Active Inquiry Frame
- Click the Current Search Window button



1Access populates an Inquiry window with a list of digital, 1ERM, templated, or content documents that match the Type and Key criteria you provide.

1. Select one or more documents, keeping in mind that:

You can open document image (I) files and templated 1ERM (G) files at the same time and they will display together in 1VIEW.

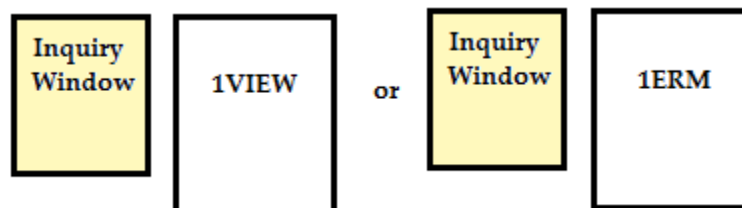
You *cannot* view 1ERM documents with any other class of documents except other 1ERM documents. However, you can accomplish this combination by converting the selection to pdf and then displaying them in the Adobe Reader all as a single pdf.

You can open only one content document (Class O) at a time.

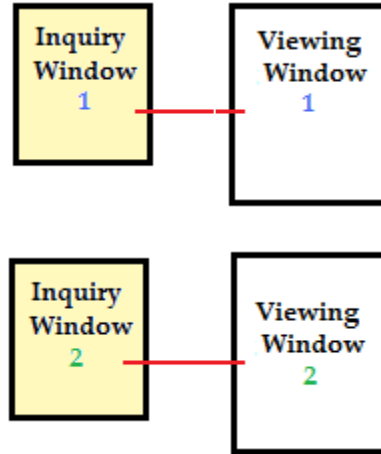
Hint If you want to compare content documents or 1ERM documents with document images and templated 1ERM documents, open a new Inquiry window.

Using active and new windows

1Access observes a one-to-one association between an inquiry window and a viewing window. This association means that for each Inquiry window that is open, there may be one 1VIEW or one 1ERM window open. (1VIEW for digital images or templated 1ERM and 1ERM for ASCII data.)

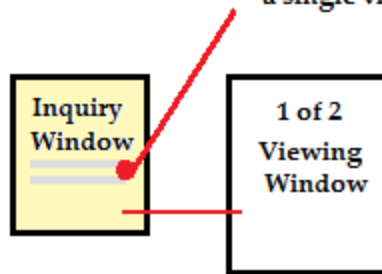


1Access identifies each Inquiry and viewing window by number.

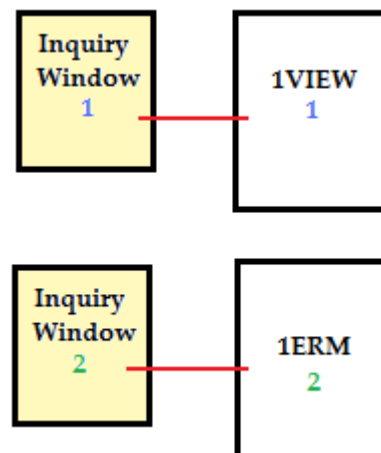


If you open an Inquiry window and select more than one 1ERM item, all 1ERM reports appear in a single 1ERM window. Similarly, if you select more than one digital image, all images appear in a single 1VIEW window. The items will appear as if they were multiple pages of a single document.

When the two items selected here are compatible, both will display in a single viewing window as sequential pages



When you want to compare documents as if they were laid out side-by-side on your desktop, create two inquiry windows. You can even retrieve a different class of document from each inquiry window, as in the example below.



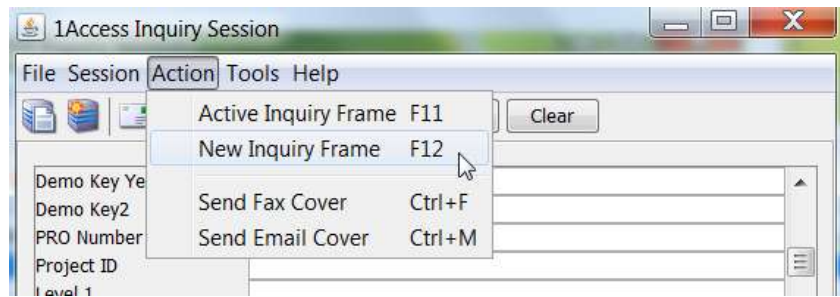
When to use a single inquiry window

If you don't need to visually compare images, employ only *one* inquiry window.

When to use multiple inquiry windows

When you need to visually compare documents —like an invoice and a purchase order—side by side, employ *multiple* inquiry windows. Each Inquiry window opens its own viewing window.





1. Enter Keys and create 'hit list' of desired criteria
2. Do one of the following:
 - Select Action | New Inquiry Window.




- Click on 
- Press F12.

Closing your windows

You may leave the Inquiry window *open* after you close the viewing and notes windows, or you may *close* the Inquiry window along with the viewing and note windows.

To	Click this button	Or choose this command
Close all open Inquiry, viewing and note windows.		C <u>l</u> ose Close Inquiry <inquiry number>
Close 1VIEW and 1NOTES(if 1NOTES is open)		C <u>l</u> ose 1 <u>V</u> IEW and Notes
Close 1ERM and 1NOTES (if 1NOTES is open)		C <u>l</u> ose 1 <u>E</u> RM and Notes
Close 1NOTES for Others		C <u>l</u> ose 1 <u>N</u> OTES for Others* * 1NOTES does not open automatically when you open the source application.

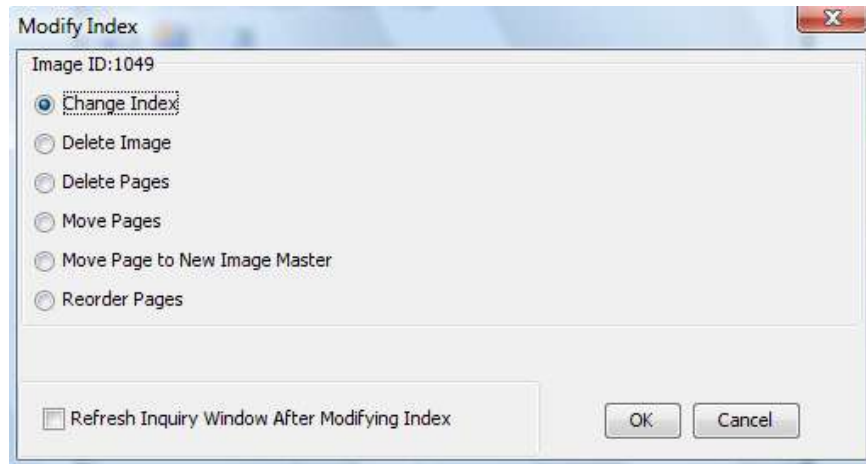
Modifying index data, deleting and rearranging pages

1. Locate the image and highlight it in the qualified hitlist.
2. Do one of the following to display the Modify Image window; the image will open simultaneously:
 - Click the Mod button on the Inquiry window toolbar, 
 - Select Action | Modify from the inquiry window menu.

If the tags CLIENT.MODIFY = Y and CLIENT.DELETE = N, this window will display:



If the tags CLIENT.MODIFY = Y and CLIENT.DELETE = Y, this window will display:



Note: The reorder pages option is enabled only when multi-page document images are selected.

To change an index


If you change an index key that is acting as a translate key, data that is derived may also change. Depending on the configuration that your

system administrator set for the OVERRIDE.TRANS tag in IM295 (Default Value Maintenance), the derived data may or not be changed.

If the OVERRIDE.TRANS tag is not set, 1Access changes the derived values without displaying a message box requesting a confirmation. If the OVERRIDE.TRANS tag is set to N(o), 1Access will make the derived values inactive (“grayed” out).

In the example below, PRO number was changed from “1900072” to “1900070.” Because OVERRIDE.TRANS was Y(es), Shipper changed from 12 to 16; in this example, however, Consignee did not change because both PRO numbers were tied to the same Consignee.

When you change the translate key, PRO #, this	becomes this																				
<table border="1"> <tr><td>PRO #</td><td>1900072</td></tr> <tr><td>Tracking Number</td><td>5000</td></tr> <tr><td>Consignee</td><td>20 SUNCO PRODUCTS</td></tr> <tr><td>Shipper</td><td>12 N2 PHAIL PALLETS</td></tr> <tr><td>Date</td><td>01/01/2000</td></tr> </table>	PRO #	1900072	Tracking Number	5000	Consignee	20 SUNCO PRODUCTS	Shipper	12 N2 PHAIL PALLETS	Date	01/01/2000	<table border="1"> <tr><td>PRO #</td><td>1900070</td></tr> <tr><td>Tracking Number</td><td>5000</td></tr> <tr><td>Consignee</td><td>20 SUNCO PRODUCTS</td></tr> <tr><td>Shipper</td><td>16 LAKES PRECISION</td></tr> <tr><td>Date</td><td>01/01/2000</td></tr> </table>	PRO #	1900070	Tracking Number	5000	Consignee	20 SUNCO PRODUCTS	Shipper	16 LAKES PRECISION	Date	01/01/2000
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Shipper	16 LAKES PRECISION																				
Date	01/01/2000																				

	To change an index, the CLIENT.INDEX and CLIENT.MODIFY tags must be set to Y(es) for your login.
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Use this command to modify the document type and associated index keys; for Images, 1ERM, Templated 1ERM, and other documents (Classes I, C, G, O)

The ‘Change Index’ radio button is selected by default when the window opens. Press Enter or click OK to close the window and open a modifying session.

The index keys currently associated with the image you see in your viewing window display.

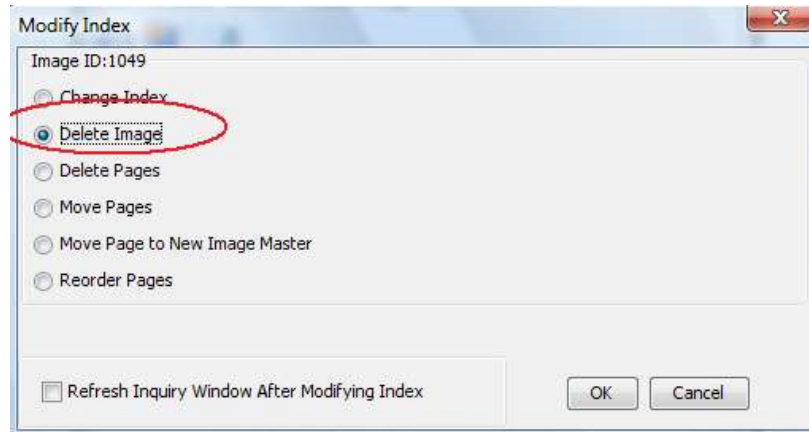
1. Change the document type and index keys as permitted and as needed.
2. Click Continue to save the change(s). All windows close and the Inquiry session re-displays (if the ‘Refresh inquiry window after modifying index’ box is checked).

To delete an image

	To delete an image, the CLIENT.INDEX, CLIENT.MODIFY, and CLIENT.DELETE tags must be set to Y(es) for your login.
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Use this command to delete the image master; for Images, 1ERM, Templated 1ERM, and other documents (Classes I, C, G, O)

1. Select the Delete Image radio button and press Enter or click OK.



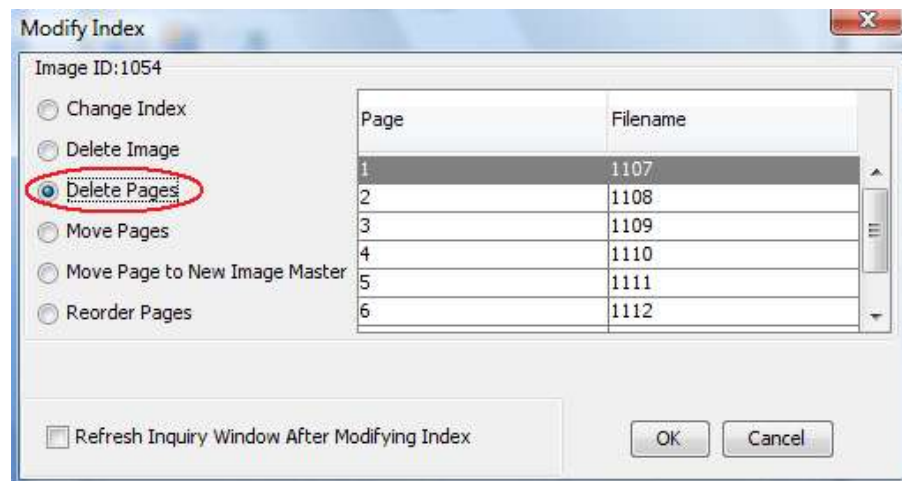
Note: This option is only available in index mode.

To delete pages

	To delete pages, the CLIENT.INDEX, CLIENT.MODIFY, and CLIENT.DELETE tags must be set to Y(es) for your login.
---	---

Use this command to delete selected pages of multi-page document images; for Images (Class I)


1. Select the Delete Pages radio button and press Enter or click OK. The Delete Pages window displays.



2. Determine which page you want to delete. Highlight the page number and press Enter or click OK. All windows close and the Inquiry session re-displays (if the 'Refresh inquiry window after modifying index' box is checked)..

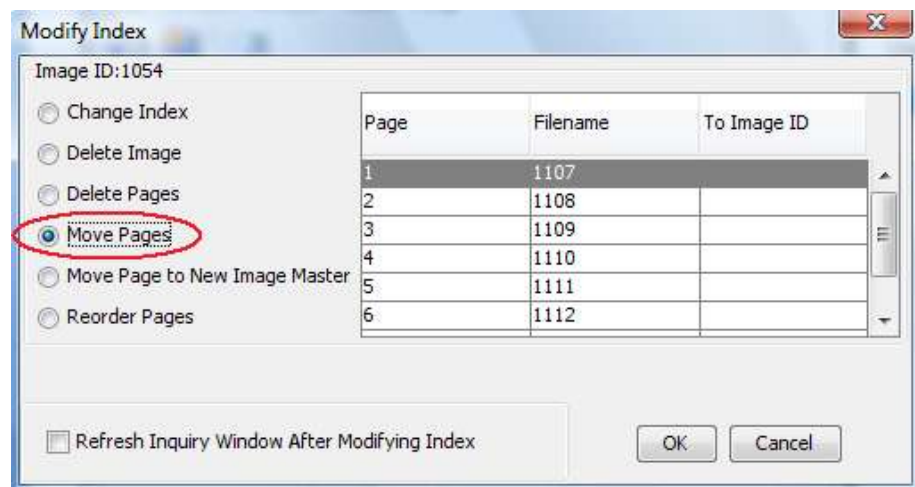
If you delete all pages, the Image Master is deleted. To exit Modify Image without deleting pages, press Cancel.

To move pages

	To move pages, the CLIENT.INDEX and CLIENT.MODIFY tags must be set to Y(es) for your login.
---	---

Use this command to move selected pages of a multi-page document to another document image. Before you begin, you must determine the ID of the receiving image; for Images (Class I)


1. Select the Move Pages radio button. Press Enter or click OK. The Move Pages window displays.



2. Enter the Image ID of the receiving page and press Enter or click OK. All windows close and the Inquiry session re-displays (if the 'Refresh inquiry window after modifying index' box is checked).

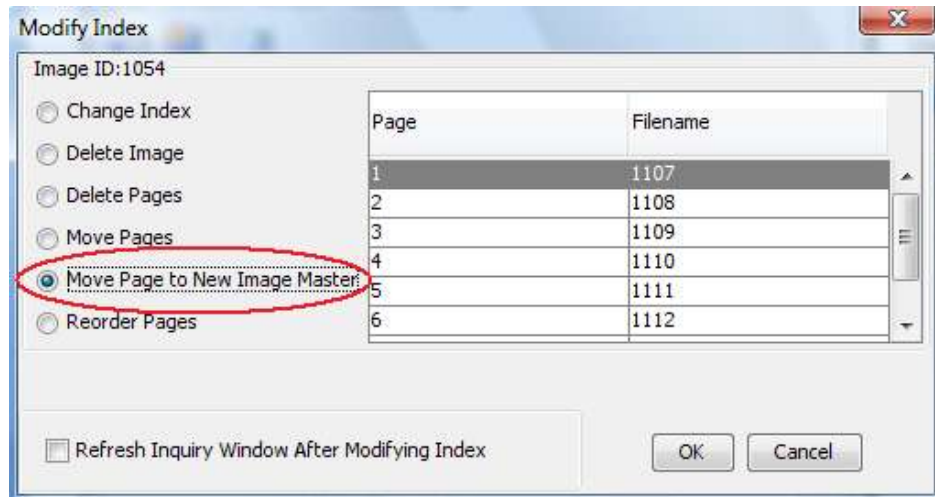
If you move all pages, the Image Master is deleted. To exit Modify Image without moving pages, press Cancel.

To move pages to new image master

	To move pages, the CLIENT.INDEX and CLIENT.MODIFY tags must be set to Y(es) for your login.
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Use this command to create a new image master and to move selected pages of a multi-page document to it; for Images (Class I)

1. Select the Move Pages to New Image Master radio button. Press Enter or click OK. The Move Pages to New Index window displays.



1. Determine which page you want to move to a new image master. Highlight the page and press Enter or click OK.
2. The Creating New Index session displays. Referencing the image in 1VIEW, select a Document type and populate its associated index keys. Press Enter or click Continue. All windows close and the Inquiry session re-displays (if the 'Refresh inquiry window after modifying index' box is checked).
3. To exit Modify Image without deleting pages, press Cancel.

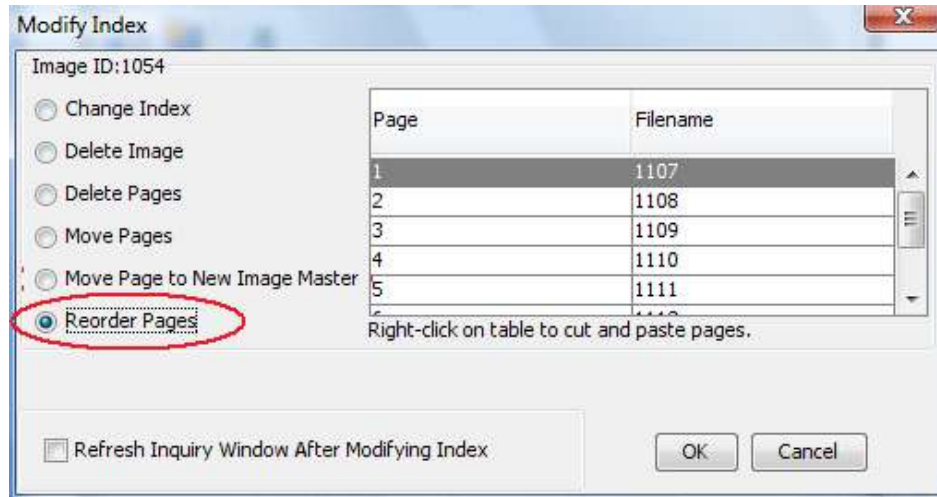
To reorder pages in an existing image master

	To Reorder pages, the CLIENT.INDEX and CLIENT.MODIFY tags must be set to Y(es) for your login.
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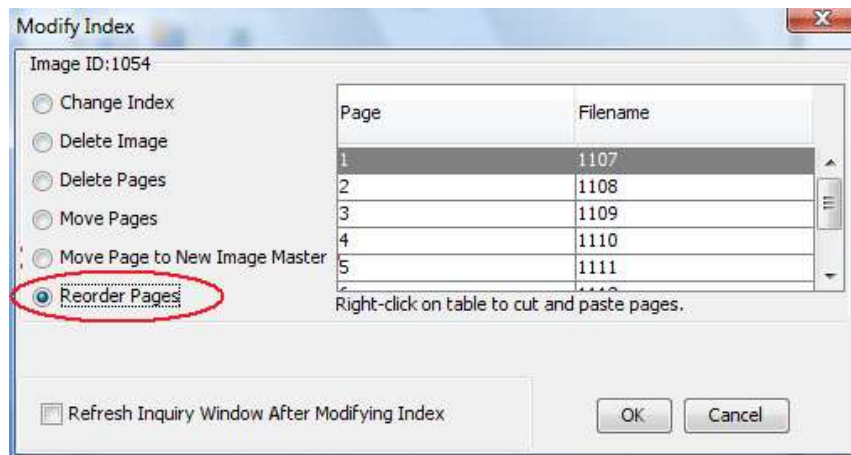
Use this command to reorder pages within an existing image master.

Reorder pages allows a valid 1IMAGE user to change the order of pages within an existing image master. This feature provides greater flexibility for document management. A page within an existing image master can be cut from its current page sequence location, then pasted to another location. The user is allowed to cut and paste pages only within an image master. Pages cannot be cut and pasted to separate image masters.

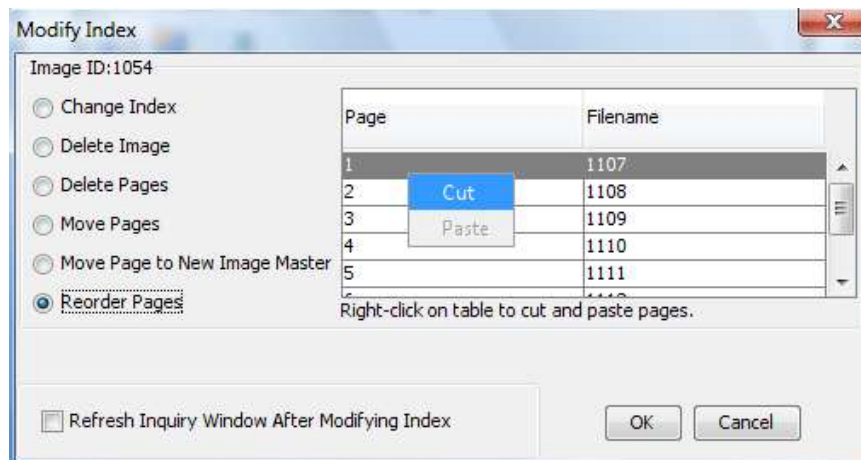
1. Select the Reorder Pages radio button. The Reorder Pages table displays in the grid area.



2. Select the page to be moved.

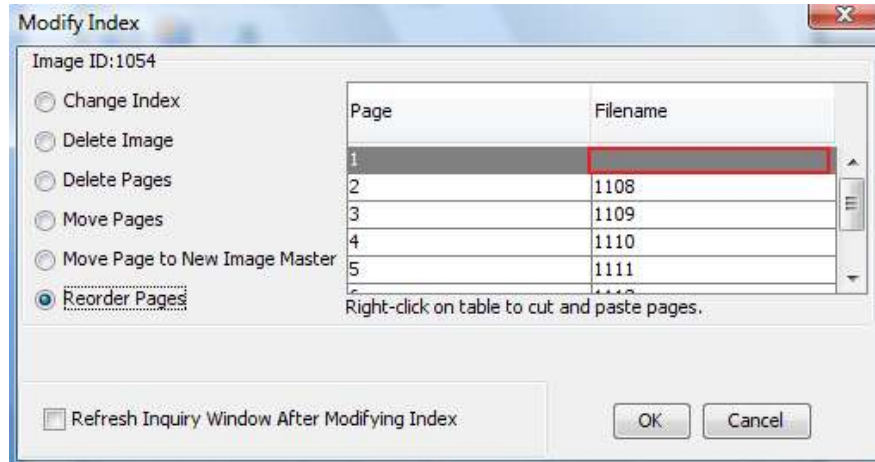


3. Click the right mouse button. A pop up menu box displays next to the Reorder Pages window. The "Cut" option is highlighted.

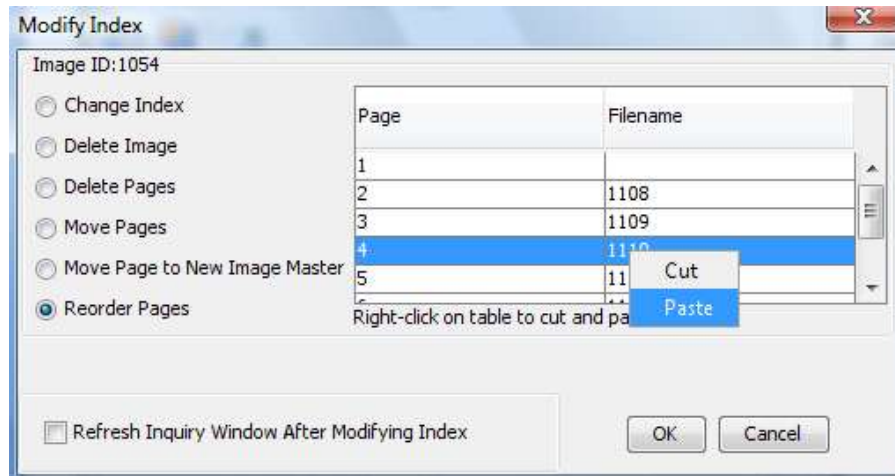


Note: The Paste option is not available until after an image has been cut.

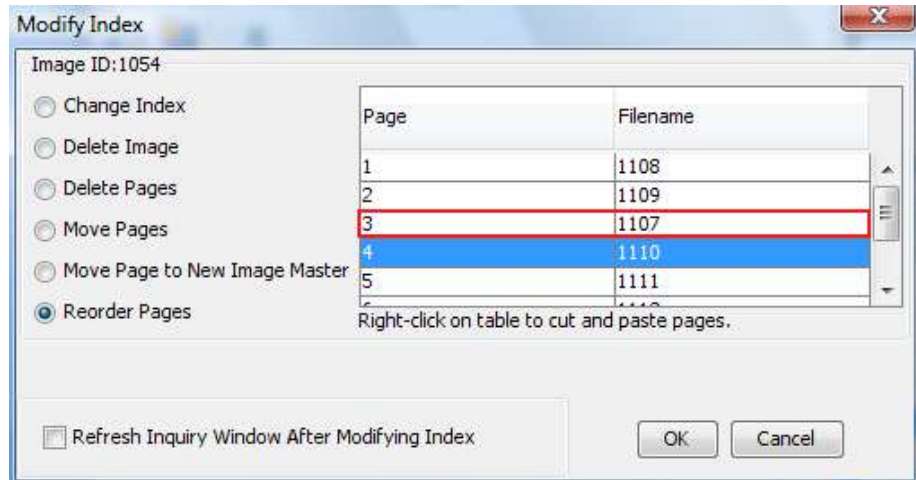
4. Click the “Cut” option. The selected page Filename field becomes blank.



5. Select the new location where the page is to be moved. Highlight the page that is to follow the moved page and click the right mouse button. A pop up menu box displays next to the Reorder Pages window with the Paste option enabled and highlighted.



6. Click Paste. The moved page is pasted before the selected page. The Filename remains the same.



7. Click OK. To exit Reorder Pages without reordering pages, press Cancel.

1Access Indexing

1Access users can *index* if the 1MAGE administrator has set the Index tag to (Yes) for that user.

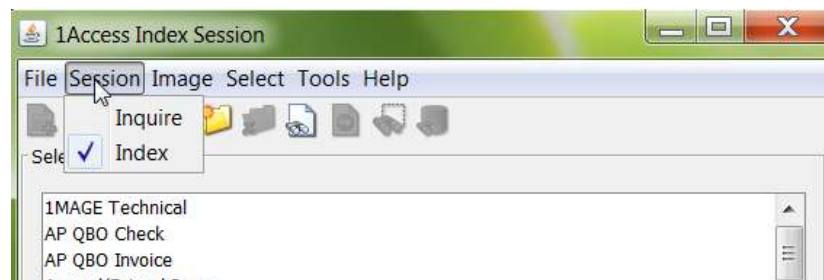
(See 1MAGE System Administration Manual, 1Access Tags)

Before a document image or content document is saved on the image server, it must be manually indexed using a *unique* combination of type and index keys that belong only to it. As a result, when you look for it using the *same combination* of data elements, that document will be the *only* document that you retrieve.

1Access Indexing uses only a session interface.

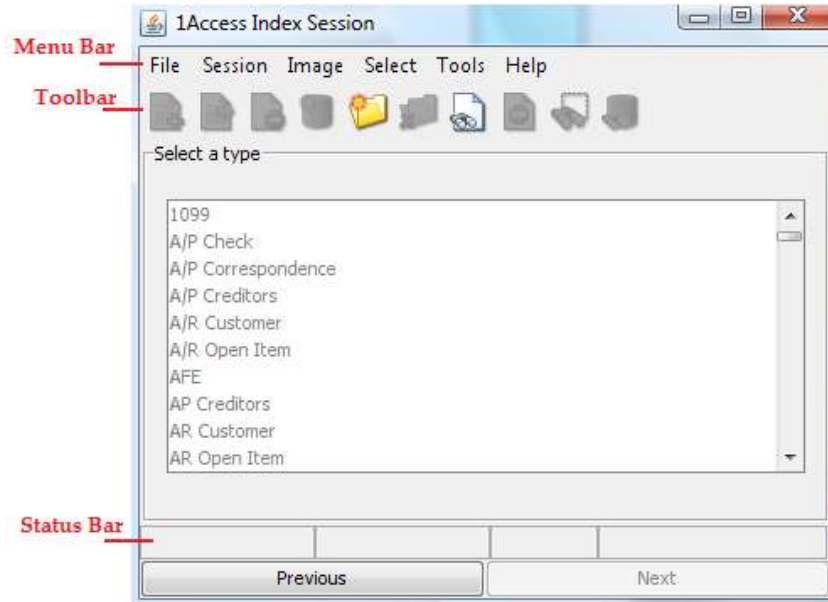


To access the indexing session- Select 'Index' from the drop-down Session Menu.



The index session interface

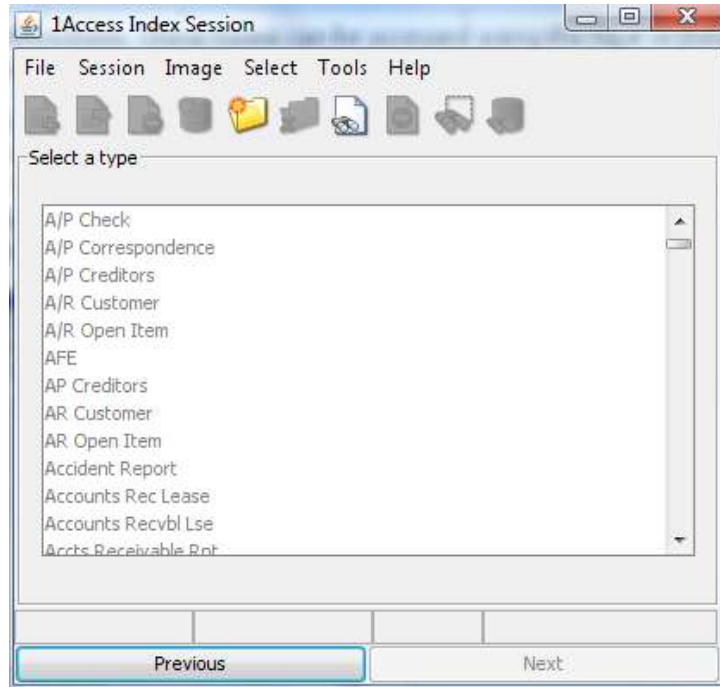
The 1Access indexing session interface displays the following elements: a menu bar, a toolbar, and a status bar at the bottom of the interface.



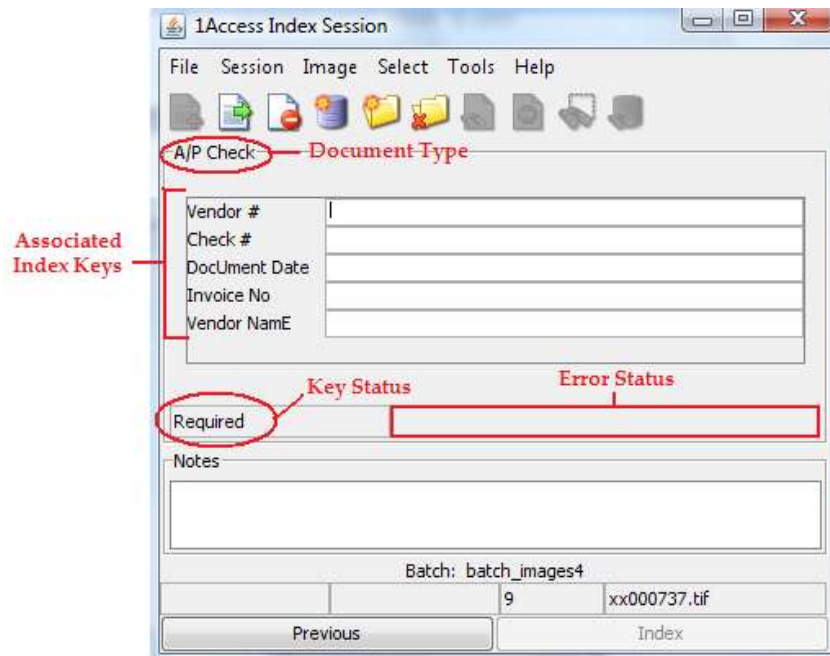
The three Indexing forms

1Access indexing has three forms: a Categories form, a Types form, and a Keys form. These forms can be accessed using the Next or Previous buttons.

By design, 1Access Indexing opens in the Types form and displays all document types. If you wish to limit the number of document types that display, return to the Categories form and limit your selected categories before you begin indexing. In 1Access indexing, you may choose only one document type.



All keys associated with the type you selected display on the Keys form. The name of the document type displays on the form just above the first index key. The key status bar alerts you when an index key is required; it also displays an error message if your data entry has failed Key Validation. This status bar display may be toggled off using Tools | Customize Display...

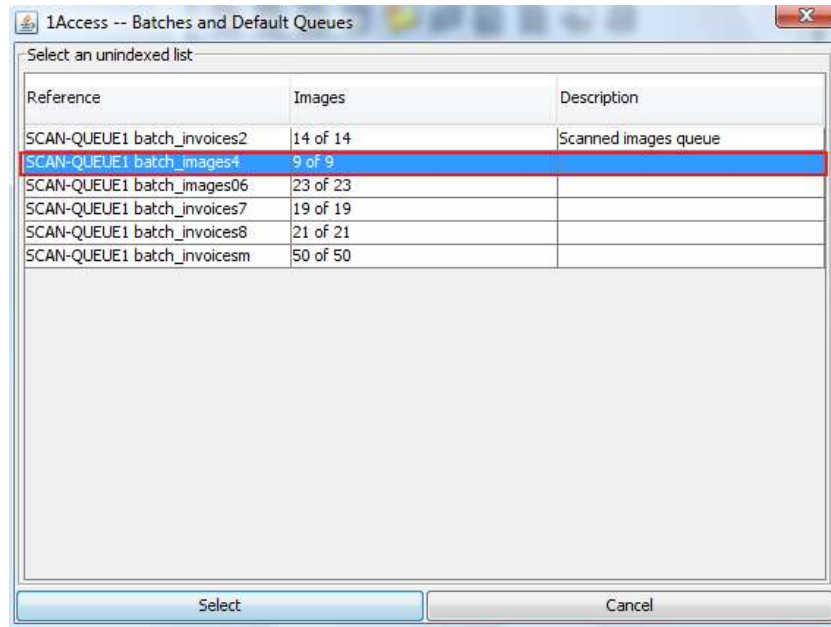


Indexing a Scanned Document

1. Once in the 'Indexing Session'- Click on the 'Select New Unindexed List... ' icon to select batch you wish to index.



2. Select a batch or queue of un-indexed images. Once selected 1View will automatically launch and display the first image.




3. Look at the un-indexed image in your 1VIEW window, and do one of the following:

- Provide index information (Go to step 4)

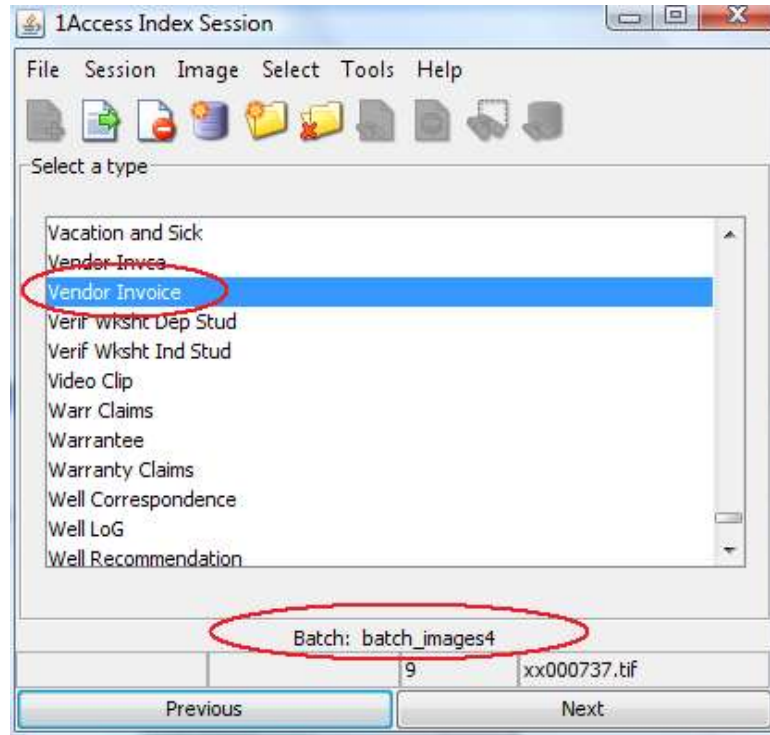
- Add the image to another 

- Skip the image 

- Delete the image 

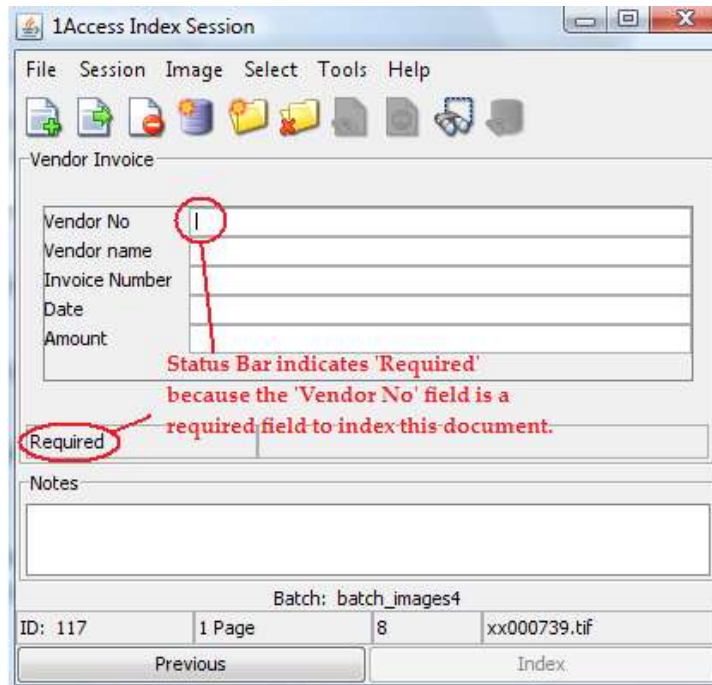
4. Select the correct document type from the Types list, and click

Next or press Alt+e. *Note: You might have to double click in the 'type' window to select your document type.*



The Keys form displays.

5. Populate all required keys. The word "Required" displays in the Key Status Bar when the cursor is in a required index key field. The status bar will be empty if field is not required.



As soon as all required keys are populated, the Index button becomes active, but continue populating the remaining keys, if possible, because they were set up to provide additional ways to *inquire* on an image.

6. To index the image, do one of the following:

If all required keys are populated and the Index button is active, either click on the Index button or press Alt + x (Index); the image is filed, the Image Master ID displays in the Status bar and the next unindexed image displays in 1VIEW.

If all keys are populated and the Index button has focus, either press Enter or press Alt + x (Index); the image is filed, the Image Master ID displays in the Status bar, and the next unindexed image displays in 1VIEW.

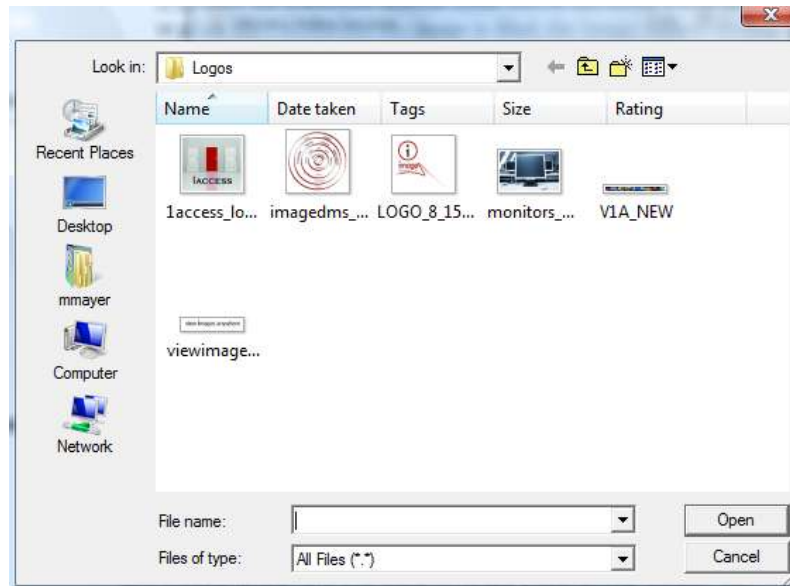
Browsing to Index a Document

With 1Access you are able to 'browse to index' document from your local PC.

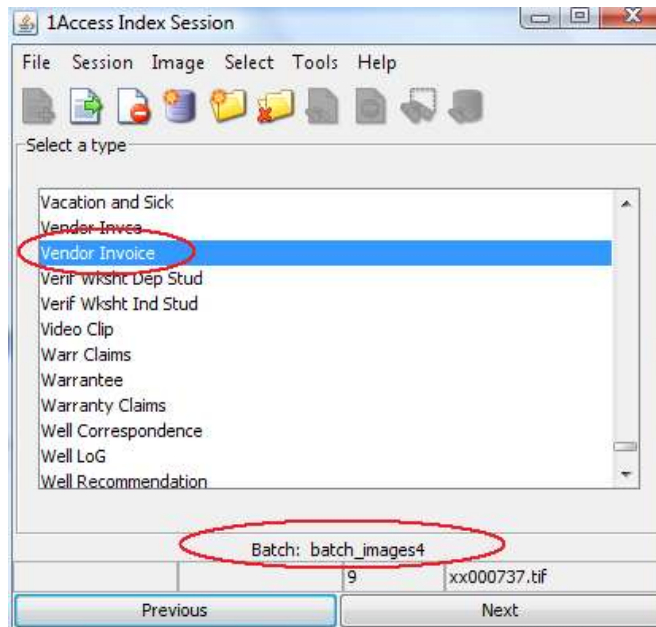
1. Once in the 'index session'... Click the 'New File...' icon.



2. You are presented with a browse window from your local PC. Select the document you'd like to index.

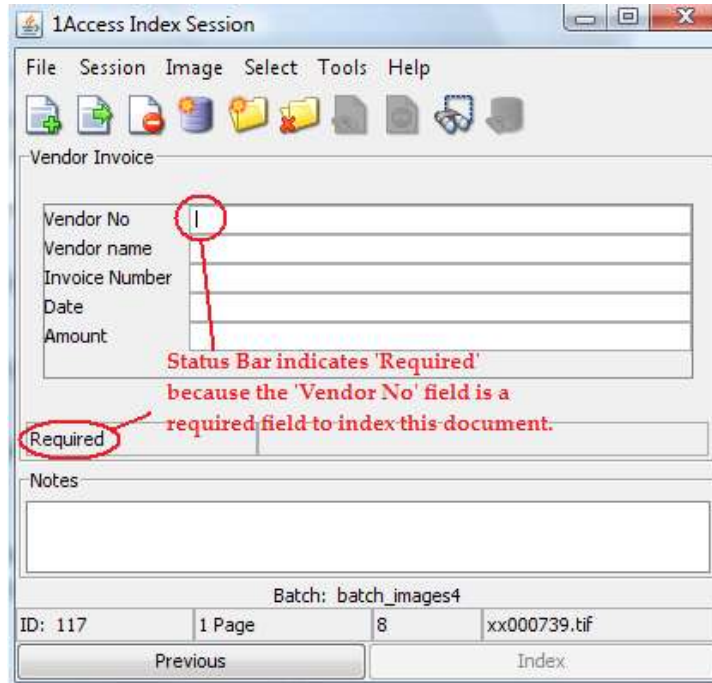


3. Select the type of document.



The Keys form displays.

4. **Populate all required keys.** The word “Required” displays in the Key Status Bar when the cursor is in a required index key field. The status bar will be empty if field is not required.



As soon as all required keys are populated, the Index button becomes active, but continue populating the remaining keys, if possible, because they were set up to provide additional ways to *inquire* on an image.

5. To index the image, do one of the following:

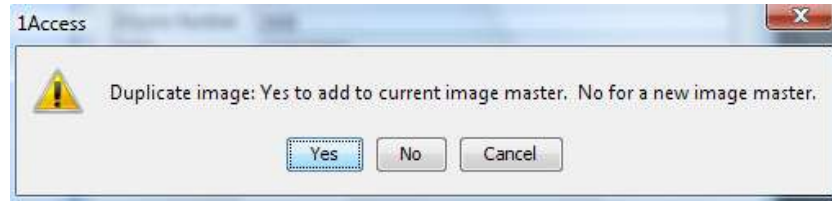
If all required keys are populated and the Index button is active, either click on the Index button or press Alt + x (Index); the image is filed, the Image Master ID displays in the Status bar and the next un-indexed image displays in 1VIEW.

If all keys are populated and the Index button has focus, either press Enter or press Alt + x (Index); the image is filed, the Image Master ID displays in the Status bar, and the next un-indexed image displays in 1VIEW.

If you create a duplicate index

If an image has a duplicate index, one of the following will take place.
(See System Administrator Manual, Tags)

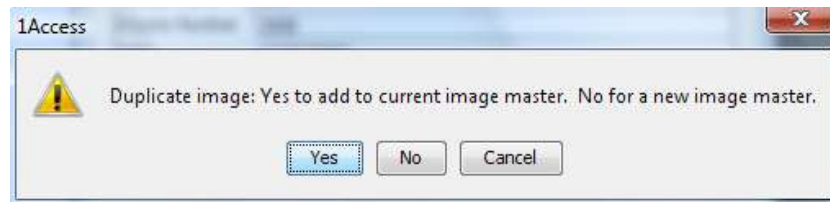
If the INDEX.OPTION1 tag is set to Y or if no INDEX.OPTION1 tag is set, the following message displays asking if you want to add the image as a page to a current image or if you want to create a new Image Master; Yes defaults.



Do one of the following:

- Press Enter or click on Yes to add the page to an existing **image; the existing image's ID displays in the Status bar** along with the number of pages that comprise the image.
- Click on No to create a new Image Master; the new Image Master ID displays in the Status bar
- Click on Cancel to return to the Keys form.

If the INDEX.OPTION1 tag is set to N, the following message displays asking if you want to add the image as a page to an current image or if you want to create a new Image Master; No defaults.



Do one of the following:

- Press Enter or click on No to create a new Image Master; the new Image Master ID displays in the Status bar
- Click on Yes to add the page to an existing image; the **existing image's ID displays in the Status bar along with the** number of pages that comprise the image.
- Click on Cancel to return to the Keys form.

Facilitating the indexing process

Examine your business processes to see if you can use scan time preparation, translated keys, type persistence, or data persistence when you index your images.

Scan time preparation

Use a combination of 1SCAN pre-indexing with specific 1IMAGE key definitions to kick off a process—known as Auto-Indexing—which may decrease or eliminate manual indexing.

A document image is auto-indexed if:

- The image was pre-indexed with a document type and up to three index keys.
- **All the “required” keys are provided; these keys will either be written to the data (.dat) file or derived from keys written to the data file during pre-indexing.**
- **All the “required” keys are set to persist. The user enters the required key data for the first image of the batch. All the remaining images in that batch will be indexed with this key data.**

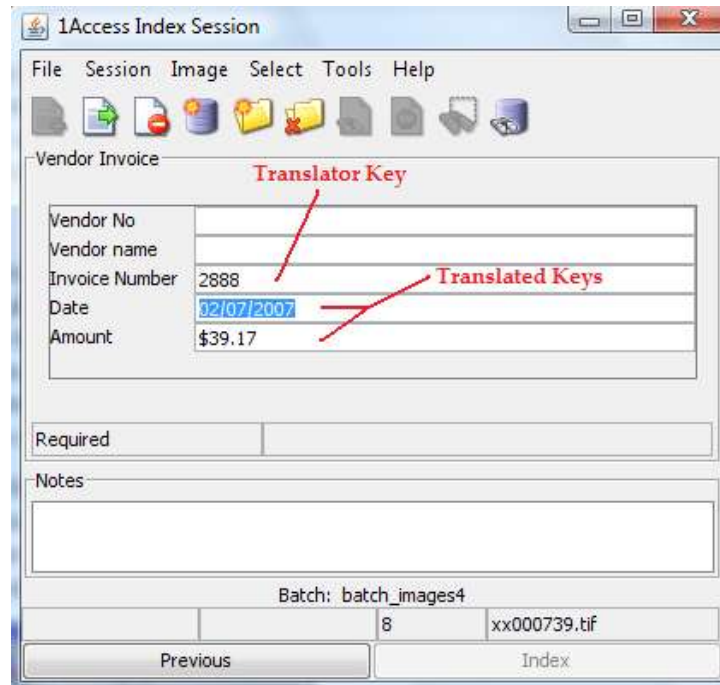
In the case of a duplicate image, if the INDEX.OPTION1 tag is not set or is set to Y(es), Auto-Index adds the image to the first duplicate found. If the INDEX.OPTION1 tag is set to N(o), Auto-Index creates a new Image Master. If required key data is not found in the data file, the Auto-Index process is halted so that you can manually index the image.

You can also speed up the indexing process by identifying multi-page documents at scan time. (1SCAN writes a *A to the data file of images which are to be added as additional pages to a preceding document.) When the Auto-Index process encounters a data file *with* a *A, it adds the corresponding image as an additional page to the indexed image; when it encounters a data file *without* a *A, it halts auto-indexing.

Translate keys

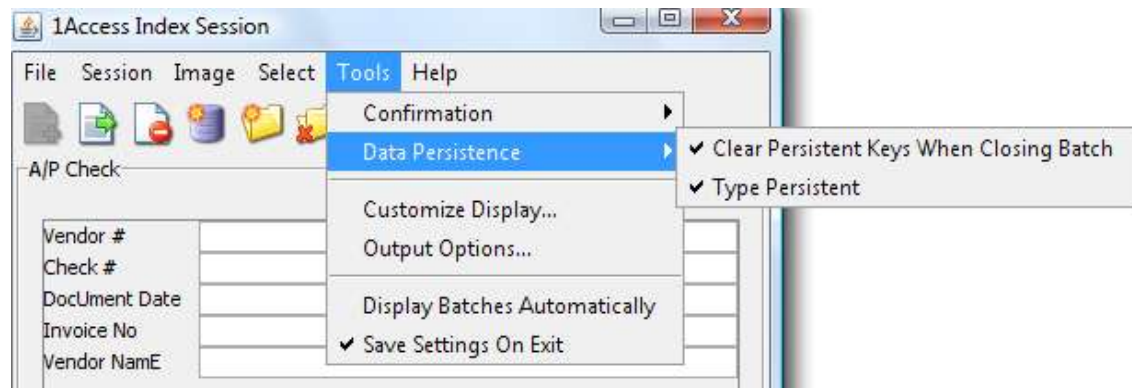
If your existing software is integrated with 1IMAGE software at the database level, one key may act as a translator for another key. As soon as a translator key is populated and validated, a translated key(s) will populate at the *bottom* of the list of index keys. The Image Administrator must define Translate Keys in IM100 if you wish to use this capability.

The keys in the example below (in addition to having been translated or derived from the LOB database based on entry of the Invoice number) have also been translated to display the name value associated with the Date and Amount.



Data persistence

Data persistence may be enabled for either type or key.



For Type

You may choose to have a document type persist because you will be indexing multiple quantities of the *same* type of document and do not want to select a new document type after each indexing event. Type persistence is enabled at installation but may be disabled and re-enabled at any time.

When type persistence is *enabled*, the *Keys* form continues to display after each indexing event until you select a new document type. When type persistence is *disabled*, the *Types* form displays after each indexing event, thereby permitting you to select a new document type for each unindexed image.

- Go to Tools/Data Persistence and click on Type persistent to enable the option.

For Key(s)

Data *persists* (that is, it *automatically populates a field*) for an index key associated with a document type if the key's Persist flag is set to Yes in Type Code Maintenance by the 1IMAGE administrator.

Document Types

99.D6-5-4-3
A INDEX NON REQ KEYS
A INVOICE
A ORDER TYPE
A.INVOICE2
A/P GL TRANSACTIONS
A/P GL TRANSACTIONS
A/P GL TRANSACTIONS
A/P INVOICES

Clear Save Delete

Type Code Full Text

Description

1FORM Overlay

PC Code List

User Defined

Storage Parameters

Aging Days Archive Eligible

Life cycle Groom Eligible

Keys

Code	S/C	Description	R	P	Pre
A.INVNO	S	A INVOICE NO	Y	Y	N
A.CUSTNO	S	A CUSTNO	Y	Y	1
A.VENDORNM	S	A VENDOR NAME	Y	Y	2
AMOUNT	S	AMOUNT	N	N	N
ADDRESS	S	ADDRESS	Y	N	3

Key Code Simplex Complex

Depending on the manner in which documents present themselves for indexing, you may wish to clear data before you index a new image.

Clear persistent data for a single indexing event

- Select Tools | Clear Persistent Data
- Press F7

Clear persistent keys when closing the batch

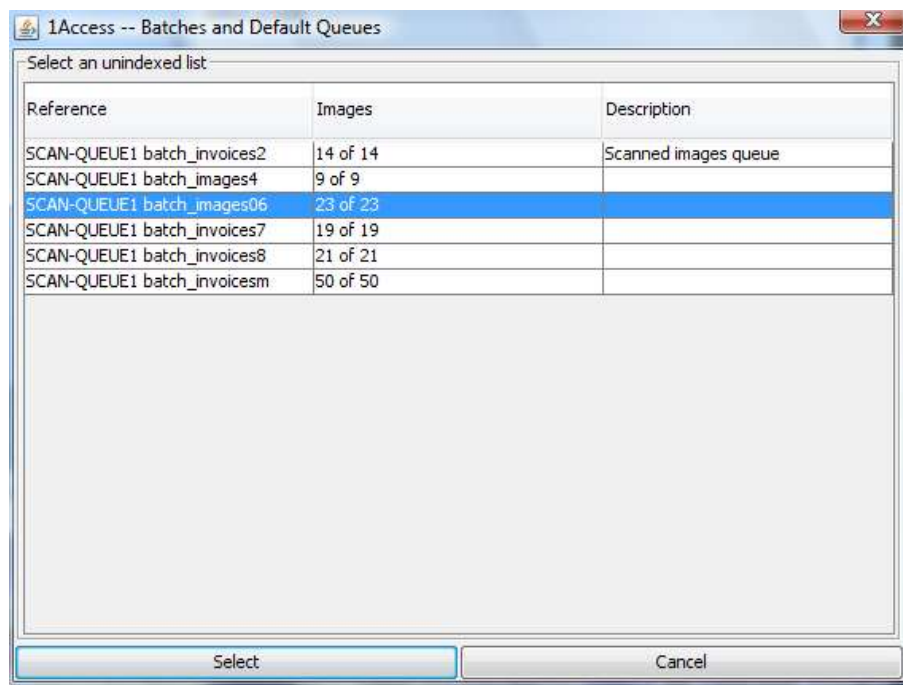
Enable Clear Persistent Keys When Closing Batch if you wish to remove persistent data before opening a new batch of unindexed images. This

feature is helpful if you recognize each scanned batch as a unique “packet” of documents. In a situation like this, you may want data (like job number and date) to persist for all pages in a packet until you finish indexing the packet and are ready to move on to another packet (batch).

- Go to Tools | Data Persistence | Clear Persistent Keys When Closing Batch and click... to enable the option.

Batches and queues

The 1Access Batches and Default Queues window displays unindexed images in batches or in queues.



Images will be sorted into queues and batches depending on the Indexing Option set by your Image System Administrator.

When you open a batch of images, the Status bar displays the name of the batch you are indexing, the number of images that remain in the batch or queue, and the name of the .tif image currently showing in 1VIEW. Once you begin indexing, the Status bar also displays the Image Master ID of the last referenced image, and the number of pages belonging to that ID.

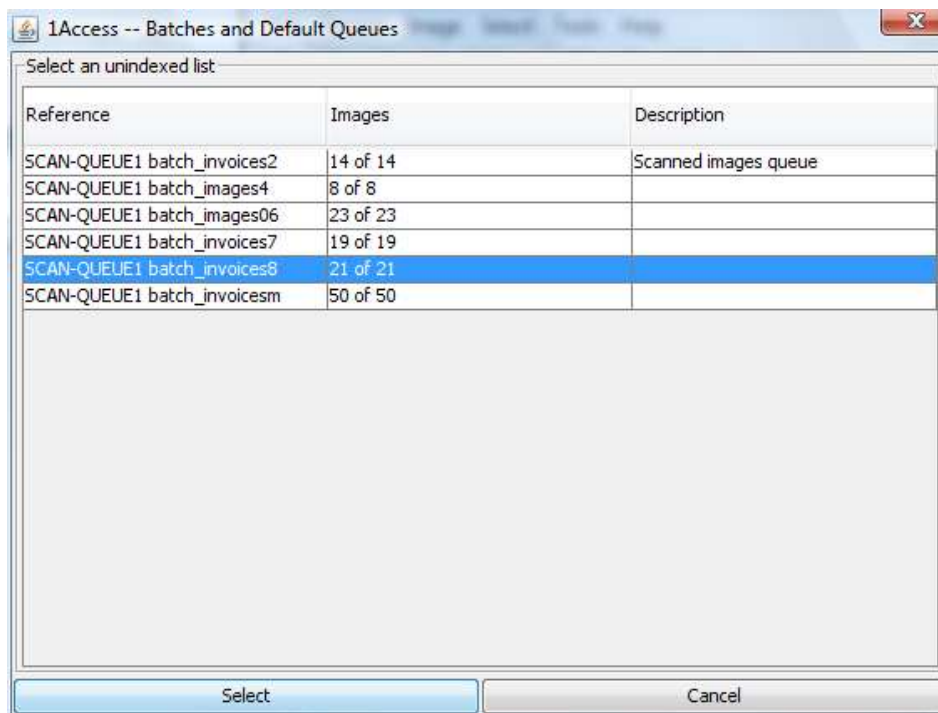
To open a batch or queue

1. Display the Batches and Default Queues window. Do one of the following:

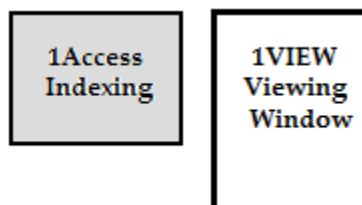
- Click the Select new batch or queue button.



- Press F8
2. Select a batch or queue of images. Do one of the following:
 - Double click on a Batch or queue name
 - Highlight a name and then click on Select or press Enter



1Access retrieves the batch or queue, the 1Access indexing interface displays, and the first unindexed image appears in a 1VIEW window. 1Access removes each image from the batch or queue and displays it in 1VIEW.



If you want to exit the 1Access-Batches and Default Queues window without selecting a batch or queue, either click the Cancel button or click the Close button at the far right of the title bar.

To close the batch

To close your current batch of images when you want to stop indexing or want to open a different batch of images, do one of the following:

- Click the Close Current Batch button

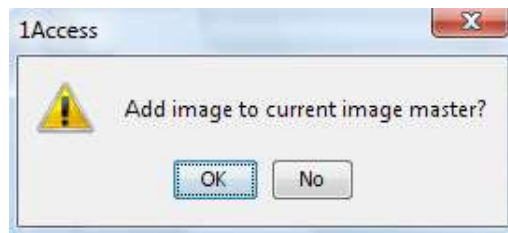


- Press F9

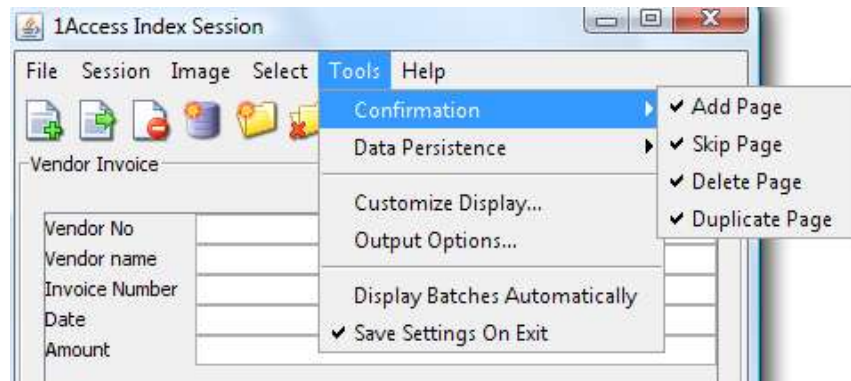
Adding, skipping, and deleting images

To display a confirmation message

At installation, messages, like the example below, which confirm Add page, Skip, and Delete, display by default. You can selectively turn off this request for confirmation.

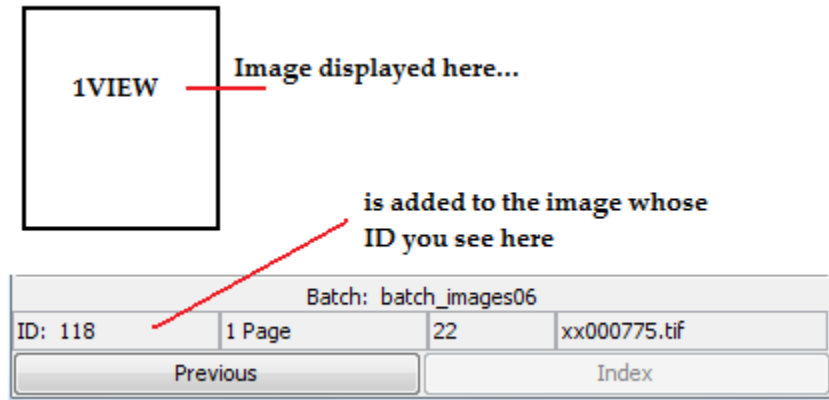



- Go to Tools/Confirmation and click on Add Page, Skip, or Delete to remove the check mark and turn off the message.




To create multi-page images

Use 1Access to create multi-page images by adding the unindexed image that displays in the 1VIEW window to the indexed image whose Image Master ID displays in the Status bar.




1. To add pages to indexed images, use Review or Locate to find the *indexed* image and display its Image Master ID in the Status bar.
2. Use one of the following to create a multi-page document image:
 - Click the  button (Add image) when in the Types or Keys form
 - Select Image | Add Page
 - Press F4

 BTW	<p>When multi-page documents are identified in 1SCAN, a *A is written to their .dat file. During the indexing process, the Auto-Index process reads each .dat file looking for a *A. When it encounters a data file <i>without</i> a *A, it stops and waits for you to index the image; when it encounters a data file <i>with</i> a *A, it adds that image, as an additional page, to the image just indexed.</p>
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To skip images

Do one of the following to send an image to the Skip Queue:

- Click the  button (Skip current image) in the Types or Keys form
- Select Image | Skip
- Press F5

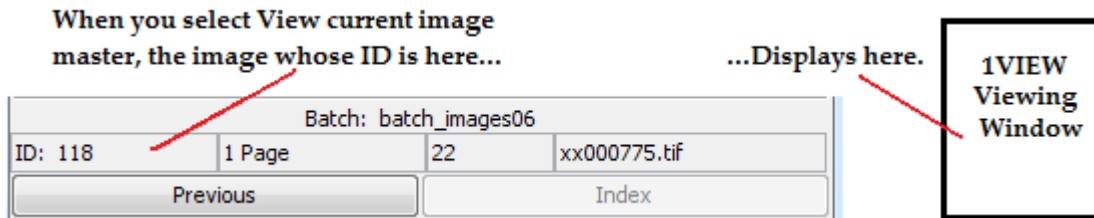
To delete images

Do one of the following to send an image to the Delete Queue:


- Click the  button (Delete current image) in the Types or Keys form
- Select **I**mage | **D**elete
- Press F6

Reviewing the last referenced image

1Access easily lets you review your last referenced image. This is the image whose Image Master ID displays in the left corner of the Status bar. Sometimes this ID will belong to the image you just indexed and sometimes it will belong to an image that you indexed long before and reviewed using the Locate function.




Use one of the following to view the current image master:

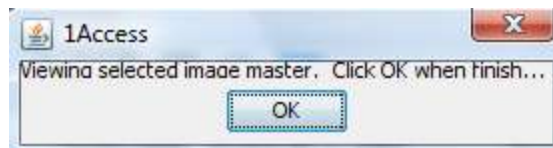
- Click the  button (View current image master) in the Types or Keys form
- Select **I**mage | **C**urrent ImageMaster
- Press F2

Locating indexed images

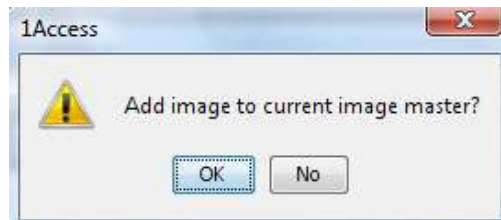
When you wish to inquire on an indexed document because you're curious or because you want to add an unindexed image to one already indexed, you must first provide inquiry data, like document type and index keys, and then use the Locate Image function.

1. Select a document type and go to Keys.
2. Populate as many index keys as you can; remember that the more keys you provide, the narrower your search becomes.
3. Do one of the following to initiate an inquiry:
 - Click the  button (Locate images) in the Types or Keys form

- Select Action | Active Inquiry Frame ...
 - Press F3
4. Select one image from the inquiry list; the View, Add and Close buttons become active.
5. Do one of the following:
- View selected image master; click on the View button. The Status bar displays the Image Master ID of the image you selected from the inquiry list, and the image displays in 1VIEW. The following message box displays. After you press Enter or click OK, the unindexed image in your batch is once again visible in 1VIEW.



- Add current page to selected image master; click on the add button. The index key fields disappear and the cursor displays in the Note area. Enter a note if you wish and then press Continue. The following message box displays.



- Click on Yes or press Enter. The Status bar displays the Image Master ID of the image you selected from the inquiry list and the next un-indexed image in your batch is added to that image master. Click No to cancel the action and re-display the index key fields.
6. Close Inquiry Window Click on the Close button to retire the inquiry window and return to the 1Access interface.