



view **i**mages anywhere

VIA

Users' Guide

1mage Software Inc.
July 2015

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Revision History

Date	Description
August 2007	Version 2.0
January 2009	Circulation Supported
March 2012	Search All Supported
July 2015	Workflow Supported

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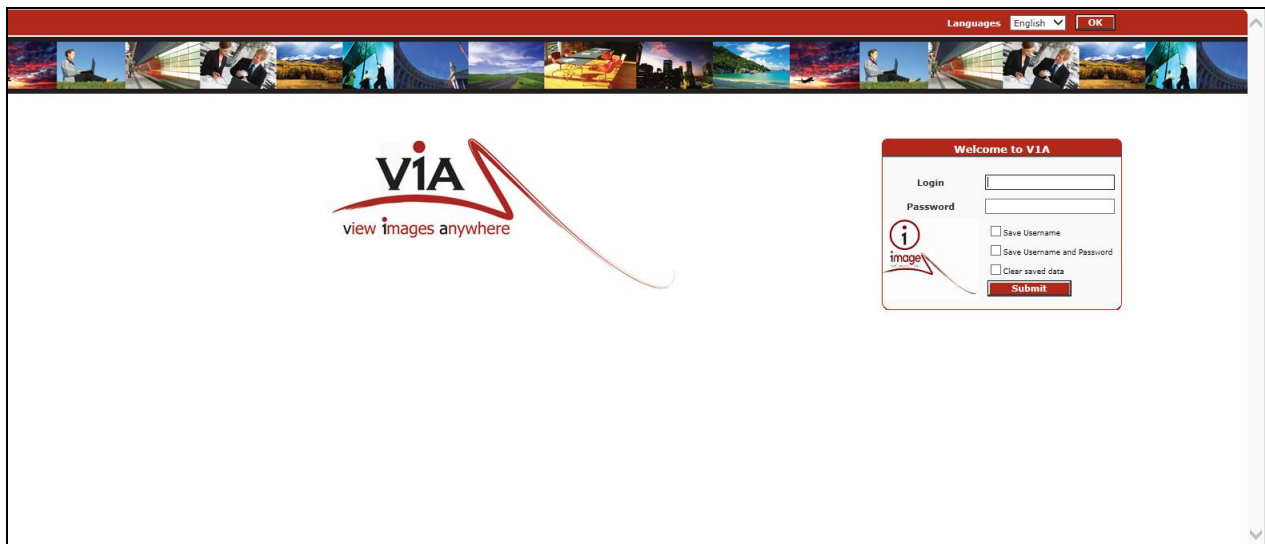
Overview

V1A (View Images Anywhere) is a user-friendly browser based application that runs in Internet Explorer, Mozilla and Firefox. It is a Web 2.0 application using AJAX technology and operates similarly on Windows, Macintosh, and Linux PCs. This technology allows quick retrieval and display of data and corresponding documents from a centralized document management system.

The following is provided as an overview of the functions of V1A. This operations guide is based on operating V1A in Microsoft Internet Explorer on Windows 7. V1A may react slightly differently on Linux and/or Macintosh desktops running FireFox.

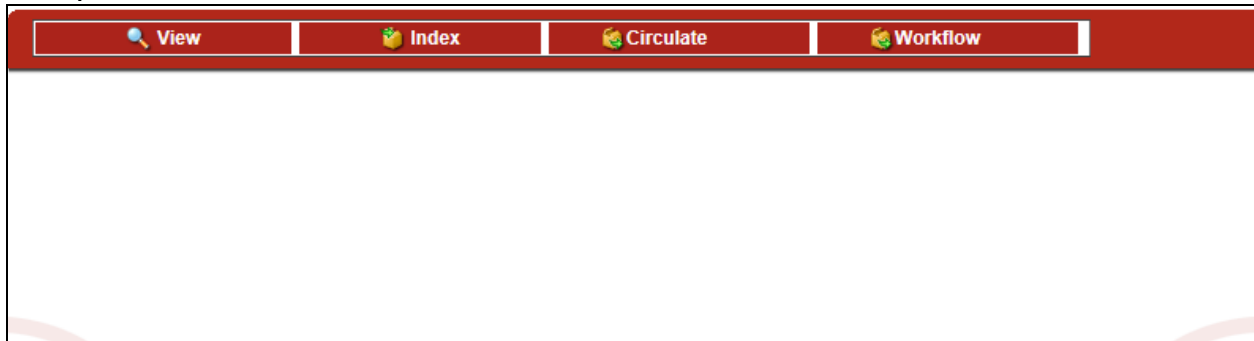
V1A is easy to use and is intuitive in its operation. The first screen is the "Welcome to V1A" log on screen. You must log on and provide an authorized password to use the application. In addition you can change the languages of the static words by simply selecting the language from the list on the log on screen (top right).

Once you make your choice click OK and begin the log on process. Your login and password control the functions that you will be able to perform as well as the documents and files you can view.



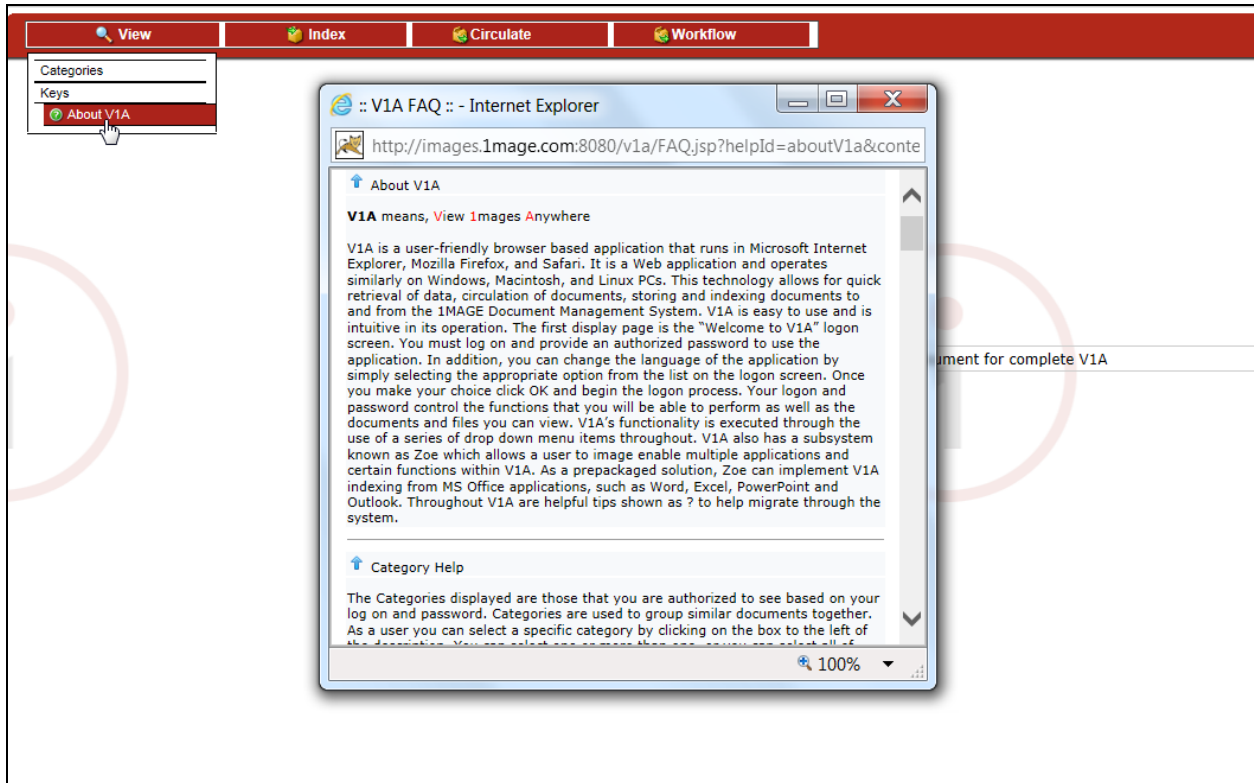
Once logged on, you will be presented with the system main menu bar (below). From this menu bar you must select from one of the drop down menu items. User may select to view,

index, circulate and utilize workflow for their documents.



Help

To learn about V1A we have made it simple by positioning help throughout the screens as shown by the green question mark. In order to view the instructions, simply click on the ? and you will be presented with an introduction to V1A and help on how to use the screen. If you have a pop-up blocker on your PC you may have to shut it off or hold down the CTRL key to retrieve the pop-up (Help) information.



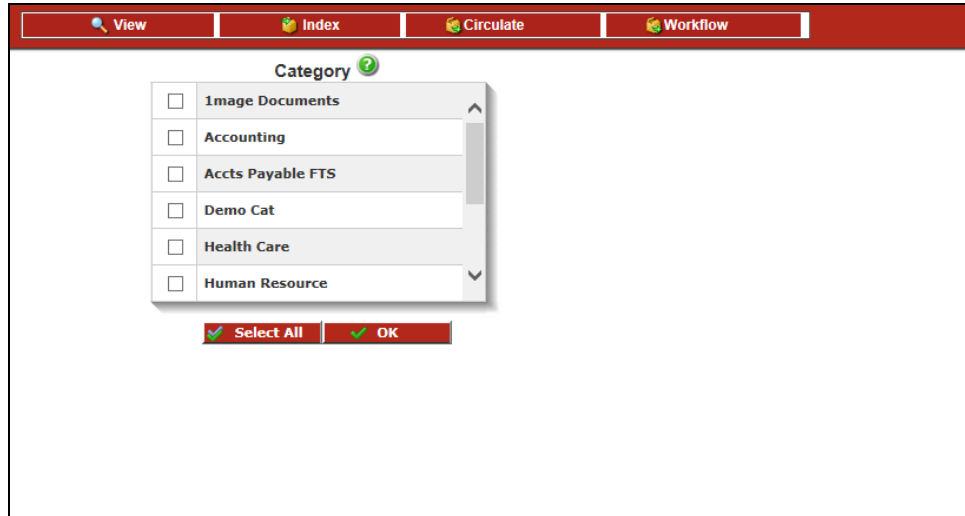
At the bottom of the 'About V1A' pop-up window you can identify the Version number and Date of the V1A application.

Searching For Documents

The main menu bar offers "View" choices which are: Categories, Keys or Help.

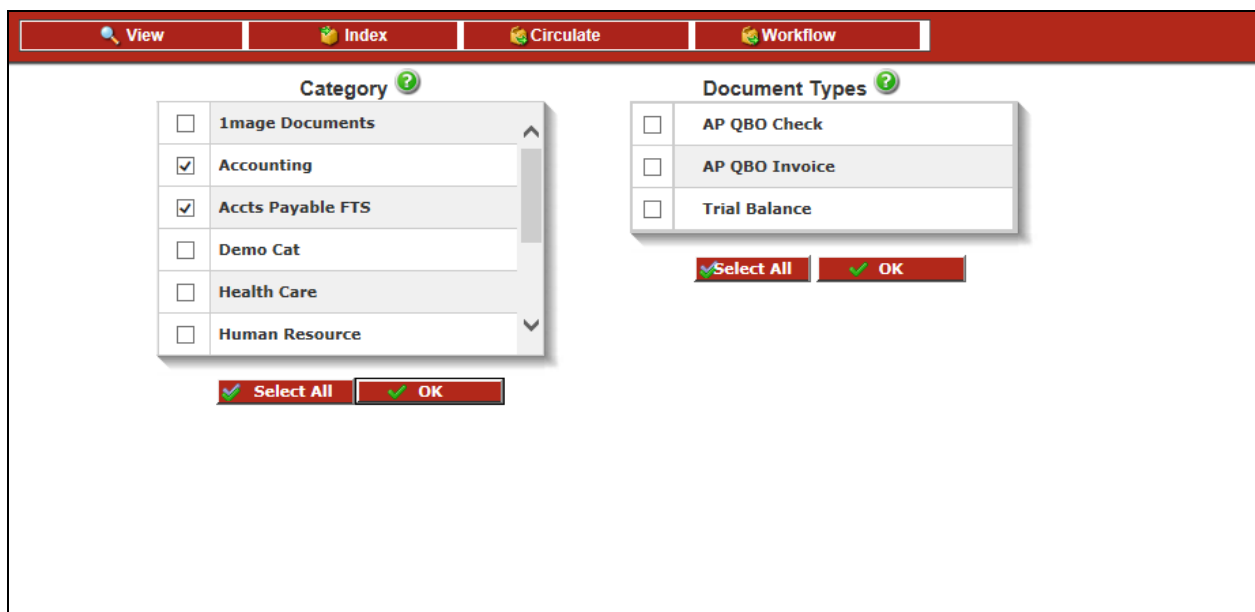
Category Screen

When you select Category, the following screen appears displaying categories your login authorizes. You may have to scroll down to see all that are available. You can select one by clicking in the corresponding box next to the Category name or you can select several, or all. To select all, simply click on the "Select All" button. Once you have selected the Category, you can retrieve the document types associated with your selection by clicking on the "OK" button.



Document Type Screen

Once you have made your selection in Category and clicked on OK, the associated document types will appear. Select the Document Type(s) you would like to see, click OK. If you want all click on the "Select All" and "OK" buttons.



Key Screen

The key screen has three inquiry options located on it. A user can utilize the Search All inquiry, Specific Key inquiry or Text Search (if enabled) inquiry.

Search All

By entering a character string in the Search All field, 1MAGE will bring back all authorized documents where that character string matches ANY key value for any index key. Ranges, cross references nor validations will work for this field. These searches will bring back a larger hitlist for the user to choose their desired document. For a narrower search, utilize the specific key search.

Keys

On the Keys display you must enter indexes associated with the specific documents that you wish to view; either the entire index value or partial. For example if the index was George Washington, the user can enter George OR Washington, but not Wash to retrieve the document. We call these data elements, "keys" or "indexes" associated with the actual documents.

The blue 'breadcrumbs' will show the user what category and document type have been selected. For multiple selections, the word 'multiple' will display. Should you want to return to either the category or document types screen, you may select either hyperlink.

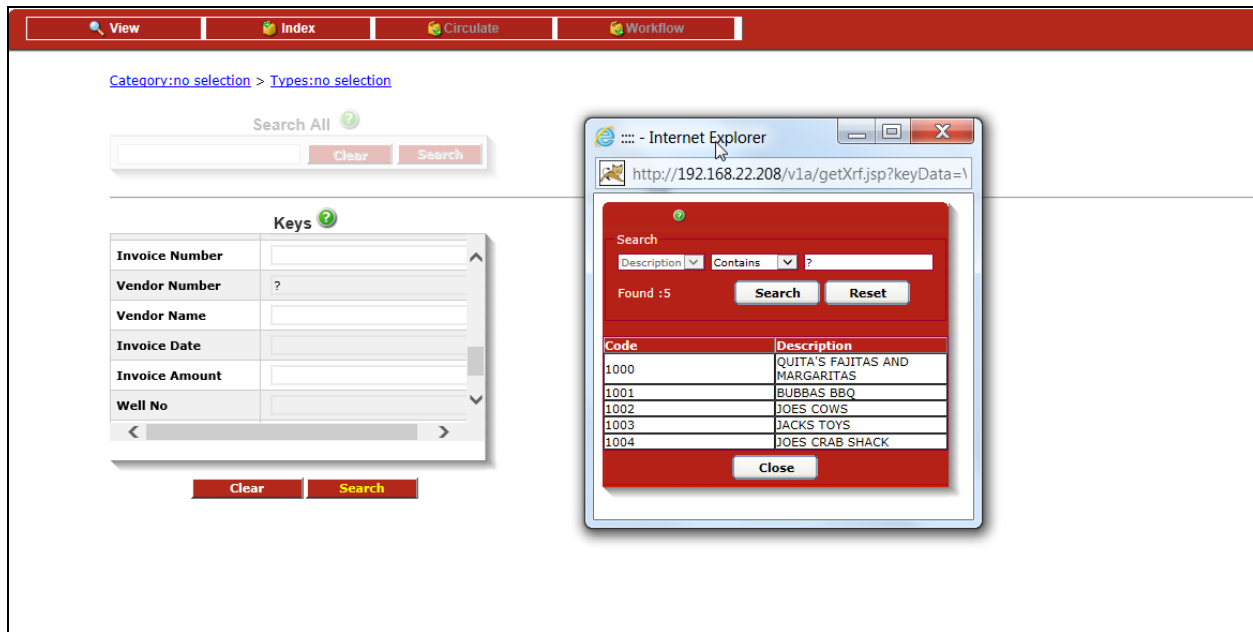
The screenshot displays the 1MAGE search interface. At the top, there is a red navigation bar with four tabs: 'View', 'Index', 'Circulate', and 'Workflow'. Below the navigation bar, the breadcrumb path is shown as 'Category:Accounts Payable > Types:VINV'. The main search area is divided into two sections by a horizontal line. The top section is titled 'Search All' with a green question mark icon. It contains a text input field, a 'Clear' button, and a 'Search' button. The bottom section is titled 'Keys' with a green question mark icon. It contains a table with six rows, each with a label and an input field: 'Invoice Number', 'Vendor Number', 'Vendor Name', 'Invoice Date', 'Invoice Amount', and 'Index Date'. Below the table are 'Clear' and 'Search' buttons. The word 'OR' is centered between the two search sections.

Cross Reference Search

If the field has a cross reference file associated (inquire with your system administrator), you may enter a ? in the field if you don't know the exact index or key to your documents.

By entering a ? in the field you will be presented with a pop-up window (example below) that will provide you with a list of available keys. From this list, simply select the one you want by clicking on it and V1A will populate the key field automatically.

Once you have the key, simply click on the "Search" button at the bottom of the Key list. You may start over by clicking on the "Clear" button. This will erase all your choices and require you to start the Key selection over.

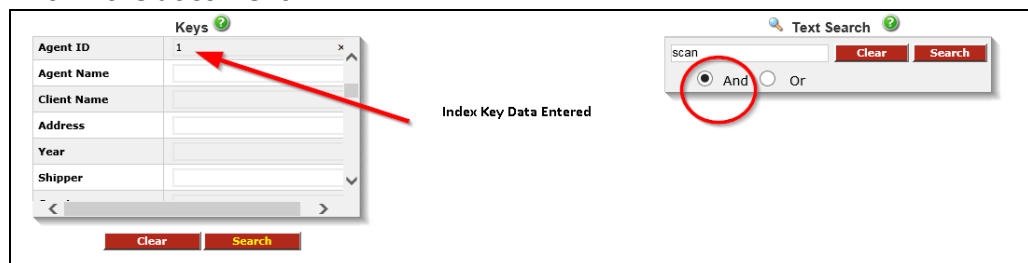


When you click on the Search button the hitlist will be displayed; this is a list of the documents that match the indexes you executed the search on.

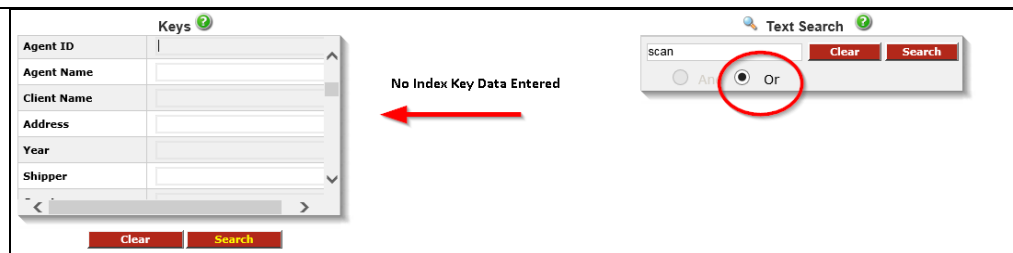
Text Search/1SEARCH

If 1SEARCH is enabled for your system, you can search for documents based on the text WITHIN the document and the Text Search box is populated. This feature is turned on/off per Document Type and must be enabled before scanning and indexing the document. You can search for your document two different ways utilizing the Text Search.

- By selecting the 'AND' radio button you are requesting that the search is performed on the document type, index key data AND the character string within the document.



- By selecting the 'OR' radio button you are requesting that the document have either the document type and index key data OR the character string within the document. By not providing any index key data the default will be 'OR'.



Helpful search tips:

- ▶ **AND Connector**
Use the AND connector in a search request to connect two expressions, both of which must be found in any document retrieved. For example:
apple pie and poached pear would retrieve any document that contains both phrases.
- ▶ **OR Connector**
Use the OR connector in a search request to connect two expressions, at least one of which must be found in any document retrieved. For example,
apple pie or poached pear would retrieve any document that contained apple pie, poached pear, or both.
- ▶ **W/N Connector**
Use the W/N connector in a search request to specify that one word or phrase must occur within N words of the other. For example,
apple w/5 pear would retrieve any document that contained apple within 5 words of pear.

The following are examples of search requests using W/N:

(apple or pear) w/5 banana

(apple w/5 banana) w/10 pear

(apple and banana) w/10 pear

- ▶ **NOT and NOT W/N**
Use NOT in front of any search expression to reverse its meaning. This allows you to exclude documents from a search. Example:
apple sauce and not pear

NOT standing alone can be the start of a search request. For example,

not pear would retrieve all documents that did not contain *pear*.

If NOT is not the first connector in a request, you need to use either AND or OR with NOT:

apple or not pear

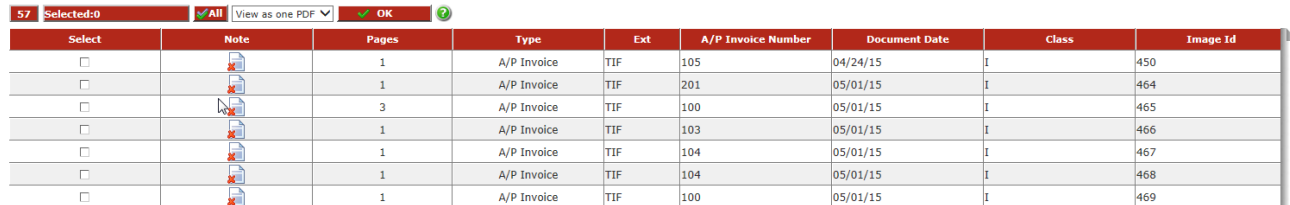
not (apple w/5 pear)

The NOT W/ ("not within") operator allows you to search for a word or phrase not in association with another word or phrase. Example:

apple not w/20 pear

Navigating the Hitlist


A hitlist is generated based on the search criteria the user enters. The list displays all images that match the search and their indexes as well as notes (if available), the number of pages, file extension, class of file and image master ID.

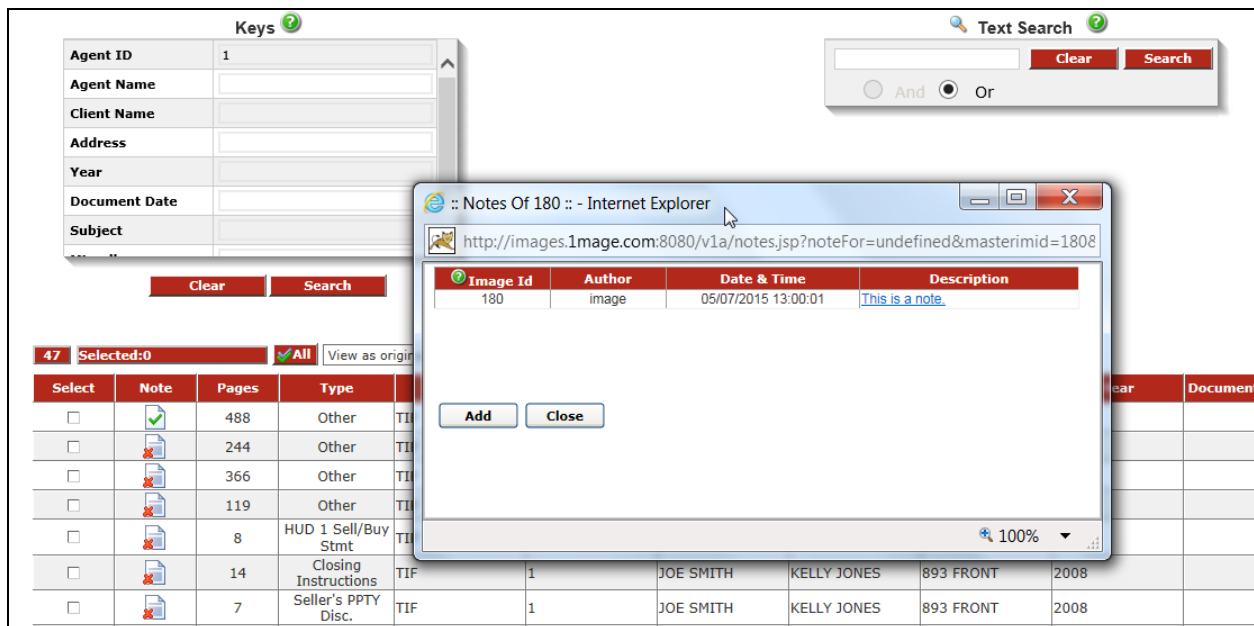


Select	Note	Pages	Type	Ext	A/P Invoice Number	Document Date	Class	Image Id
<input type="checkbox"/>		1	A/P Invoice	TIF	105	04/24/15	I	450
<input type="checkbox"/>		1	A/P Invoice	TIF	201	05/01/15	I	464
<input type="checkbox"/>		3	A/P Invoice	TIF	100	05/01/15	I	465
<input type="checkbox"/>		1	A/P Invoice	TIF	103	05/01/15	I	466
<input type="checkbox"/>		1	A/P Invoice	TIF	104	05/01/15	I	467
<input type="checkbox"/>		1	A/P Invoice	TIF	104	05/01/15	I	468
<input type="checkbox"/>		1	A/P Invoice	TIF	100	05/01/15	I	469

Each row is a separate image and each column represents information about that image.

Notes

If there is a note associated, the icon will appear as . By selecting the icon, the notes window will appear. You can view or add a note by selecting the 'Add' button. The note is date and time stamped along with the author of the note. You can also sort the data within the note window by simply clicking of the header on the top of the column you want sorted. When finished just click on the "Close" button, or X out the window.



The screenshot shows the application interface with several windows open. The 'Keys' window is in the background, showing fields for Agent ID, Agent Name, Client Name, Address, Year, Document Date, and Subject. The 'Text Search' window is also visible, with a search bar and 'Clear' and 'Search' buttons. The 'Notes Of 180' window is the primary focus, displaying a table with the following data:

Image Id	Author	Date & Time	Description
180	image	05/07/2015 13:00:01	This is a note.

Below the table are 'Add' and 'Close' buttons. The background hitlist table is partially visible, showing columns for Select, Note, Pages, Type, Ext, A/P Invoice Number, Document Date, Class, and Image Id.

The Note heading bar contains the image number (image ID) of the actual document that the note belongs to, so when minimized you can tell which note belongs to which image ID in the corresponding hitlist.

You can open as many notes as you desire, simply by clicking on the notes icon, however you will need to close them by clicking on close or X out each individual window.

Pages

If you wish to view certain pages of a multipage document, select the document, and the pages field will become editable. Enter the pages you wish to view.

Select	Note	Pages	Type	Ext	Agent ID
<input checked="" type="checkbox"/>		1-488	Other	TIF	1

Selecting Documents

By clicking the box in the left column, you will select the image. You can select as many as you desire, then select an option from the drop down menu to execute the action. Please be aware of the EXT column as some document types may not be able to be combined/converted to a PDF.

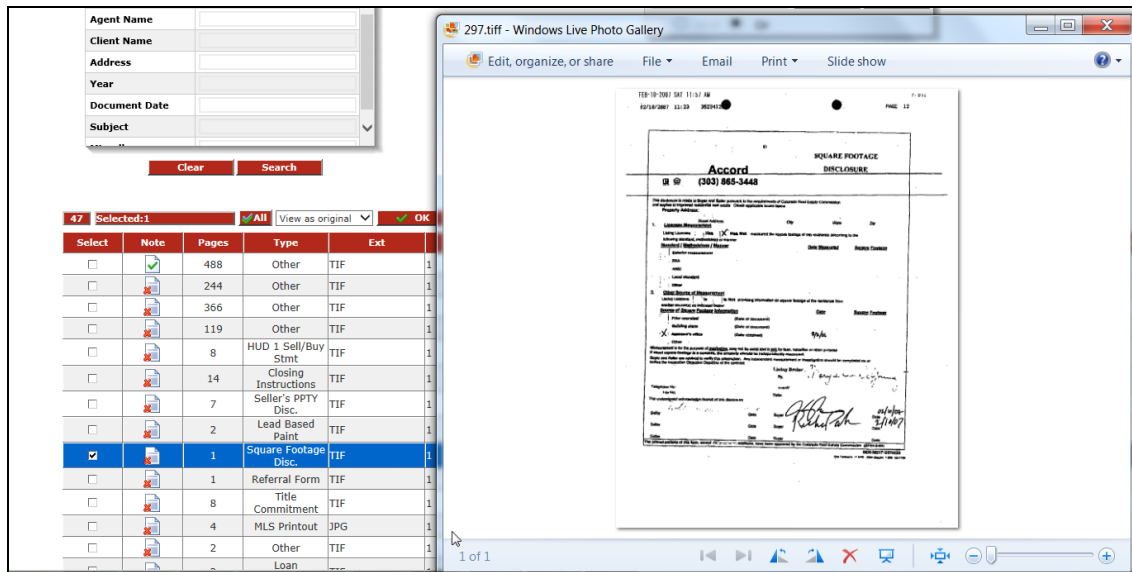
You have multiple options in the drop down menu; "View as original", "View as PDF", "View as one PDF", circulate (if enabled) and workflow (if enabled). You may need to hold down the Ctrl button to allow for multiple pop-ups of the view windows. Ensure your browser's settings allow for pop-ups.

Select	Note	Pages	Type	Ext	Agent ID	Agent Name	Client Name
<input checked="" type="checkbox"/>		1-488	Other	TIF	1	JOE SMITH	PETER ANDERSON
<input type="checkbox"/>		244	Other	TIF	1	JOE SMITH	PETER ANDERSON
<input type="checkbox"/>		366	Other	TIF	1	JOE SMITH	PETER ANDERSON
<input type="checkbox"/>		119	Other	TIF	1	JOE SMITH	MIX ANDERSON
<input type="checkbox"/>		8	HUD 1 Sell/Buy Stmt	TIF	1	JOE SMITH	KELLY JONES
<input type="checkbox"/>		14	Closing Instructions Seller's PPTY	TIF	1	JOE SMITH	KELLY JONES

View as Original

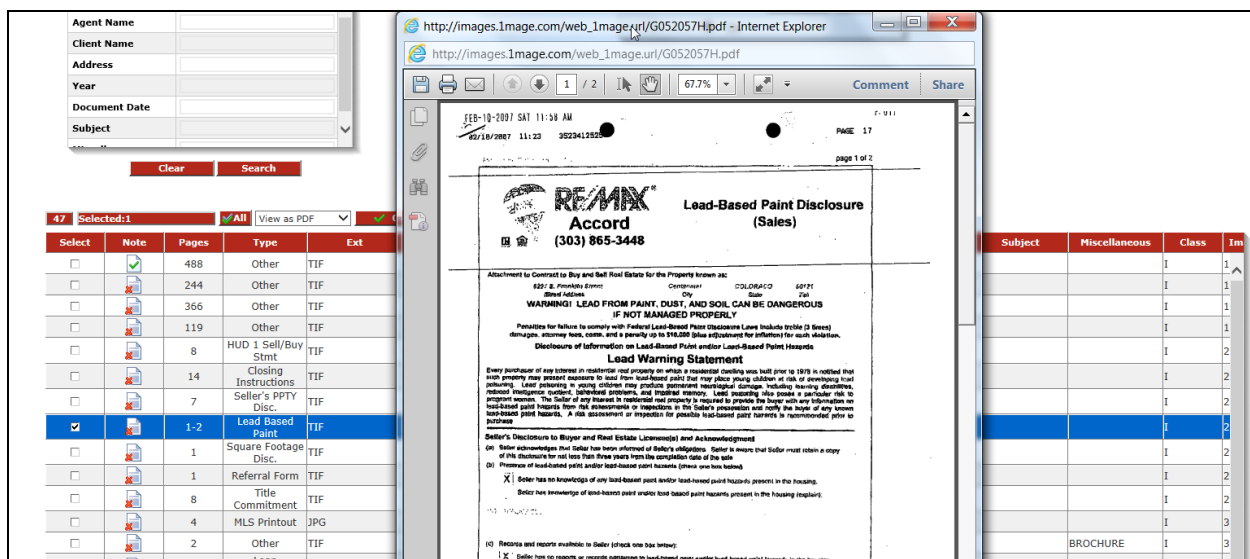
You must have the program/viewer on your PC for the image to display in its original form, ie: Adobe Reader, Adobe Photoshop, Microsoft Word, etc . If the saved file is a PDF, you must select 'View as Original' to view it.

Once V1A presents the selected document to your viewer, it is under the control of the viewer application available on your PC. Should you make any changes to the document, you will have to re-index the new document. You cannot override the current version.



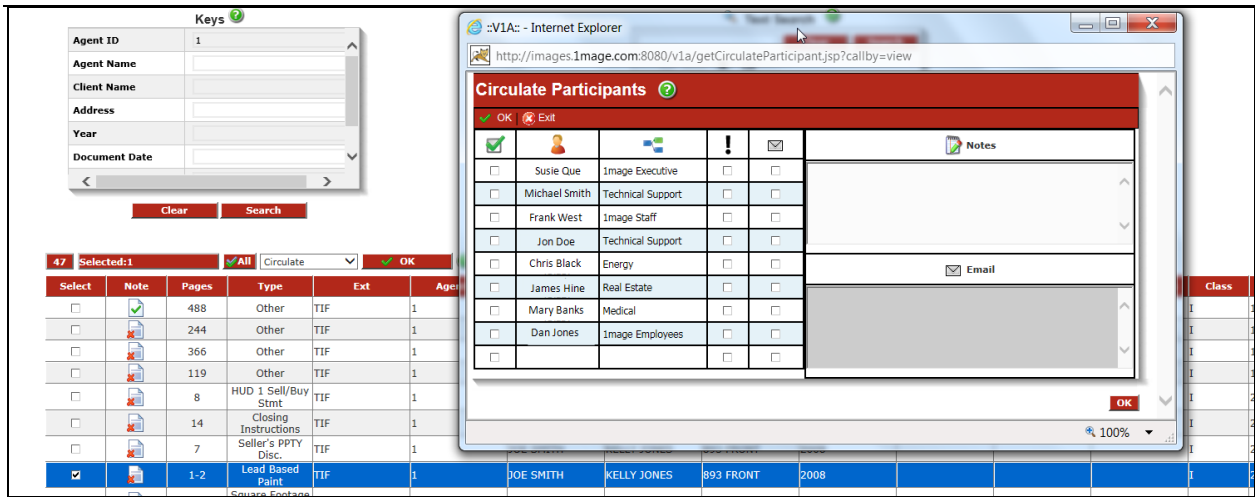
View as PDF/View as one PDF

You will need a PDF viewer on your PC to view any image in PDF format. Once displayed you can email and print the document by using the commands in the Reader viewer. (See Adobe Reader specifications). Should you wish to combine multiple files into a single PDF select the 'View as one PDF'. Convertible file types into a pdf include: tif, .jpg, .pdf, .txt and COLD.



Circulate

Circulation is an added feature and may be turned off, check with your administrator for details. If you wish to circulate a single or multiple documents, select the document(s) and use the drop down 'Circulate', select OK.

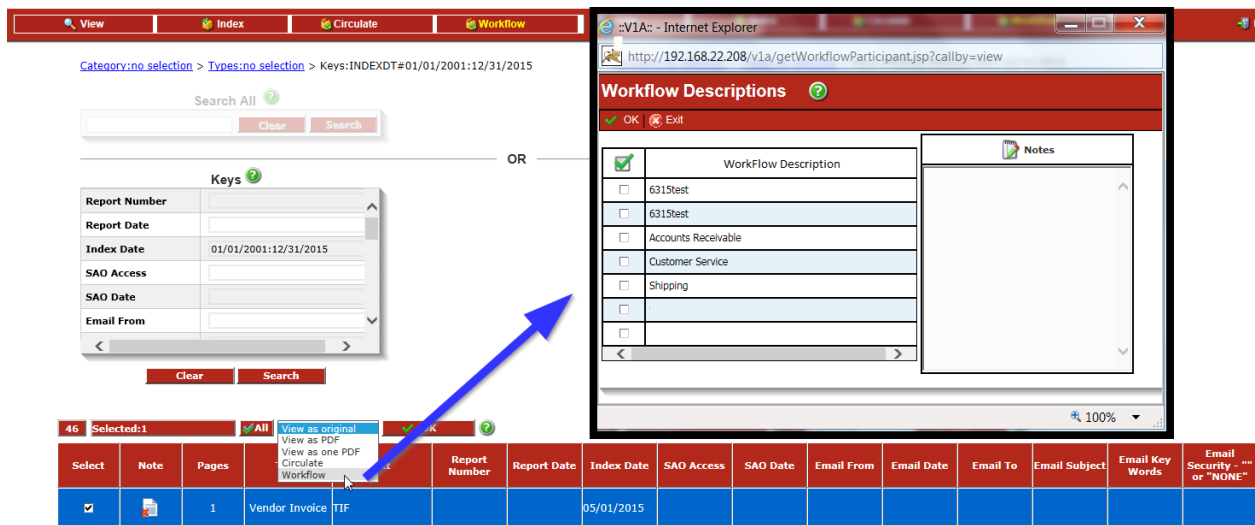


Select the contact(s) you wish the documents to be circulated to. You can also choose to have the circulation item to have a high importance by selecting the box in the ! column. This will be sent to their Circulation Inbox. Should you wish to have a notification email sent in addition, select the box in the email icon column. The Notes and Email text boxes are optional; the note will be added to the document(s)'s permanent note file and the email text will be sent in the body of the email. Clicking the OK button on the bottom right will execute the circulation.

Workflow

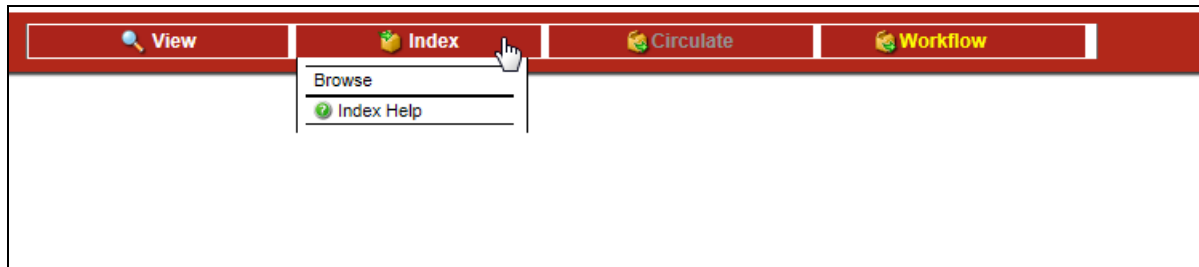
Workflow is an optional feature and may be turned off, check with your administrator for details. Workflow will allow users to send document(s) into previously created workflow routes. If you wish to initiate a single or multiple documents in a route, select the document(s) and use the drop down 'Workflow', select OK.

Select the workflow you wish to drop the selected document(s) into. Enter a note if desired; the note will be added to the document(s)'s permanent note file. Select 'OK' on the toolbar to complete the initiation.



Indexing a Document

Once logged on, you will be presented with the system main menu bar. From this menu bar you must select from one of the drop down menu items. If you want to send a local document to the image server you must have been given rights to do so by your system Administrator. If you have not been given rights your Index/Browse menu item will not be activated.



By selecting the Browse item on the drop down menu you will be presented with a display that will require you to choose a category or multiple categories to assign to the file you want to save to the image server. Multiple choices of Categories are permitted.

Once you have selected the Category or multiple Categories the system will present to you a list of approved Document types that are assigned to these Categories.

The Document type list will appear on your display. From this list you must select ONE document type that will be assigned to the file you wish to save on the server.

In the example below you can see that all the Categories were select and then ONE Document Type was selected. When you are satisfied with your selection, click on the OK button.

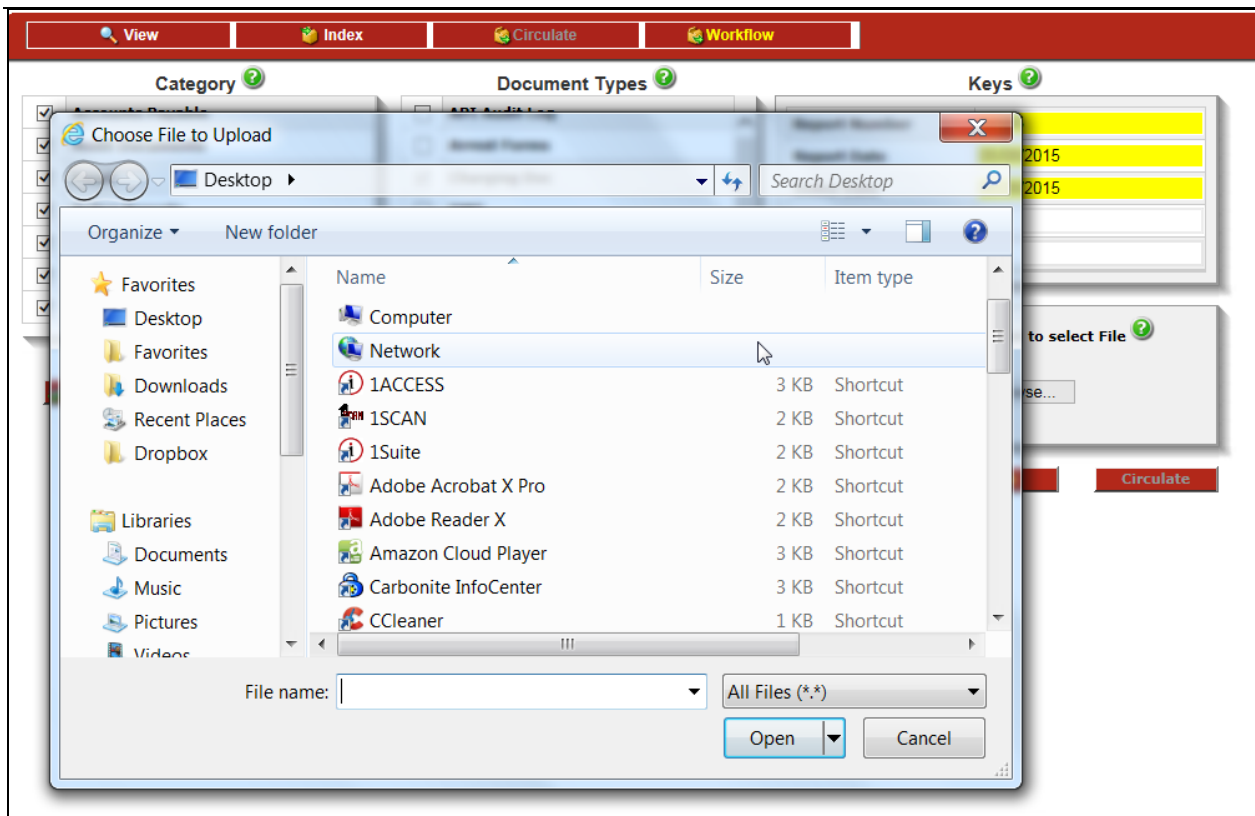
The screenshot shows a software interface with a red header bar containing four tabs: 'View', 'Index', 'Circulate', and 'Workflow'. Below the header, there are two main panels. The left panel is titled 'Category' and contains a list of seven items, each with a checked checkbox: 'Accounts Payable', 'Audit Documents', 'Email', 'Police Reports', 'Test Category', 'Test Meagan', and 'Well Files'. The right panel is titled 'Document Types' and contains a list of seven items, each with an unchecked checkbox: 'API Audit Log', 'Arrest Forms', 'Charging Doc', 'DWI', 'Email', 'Offense Report', and 'Test Type'. Below these panels are three buttons: 'Deselect All', 'OK', and 'OK'.

When you click on OK, the below index keys screen will appear. The Keys display is the index keys that you must assign to your local file.

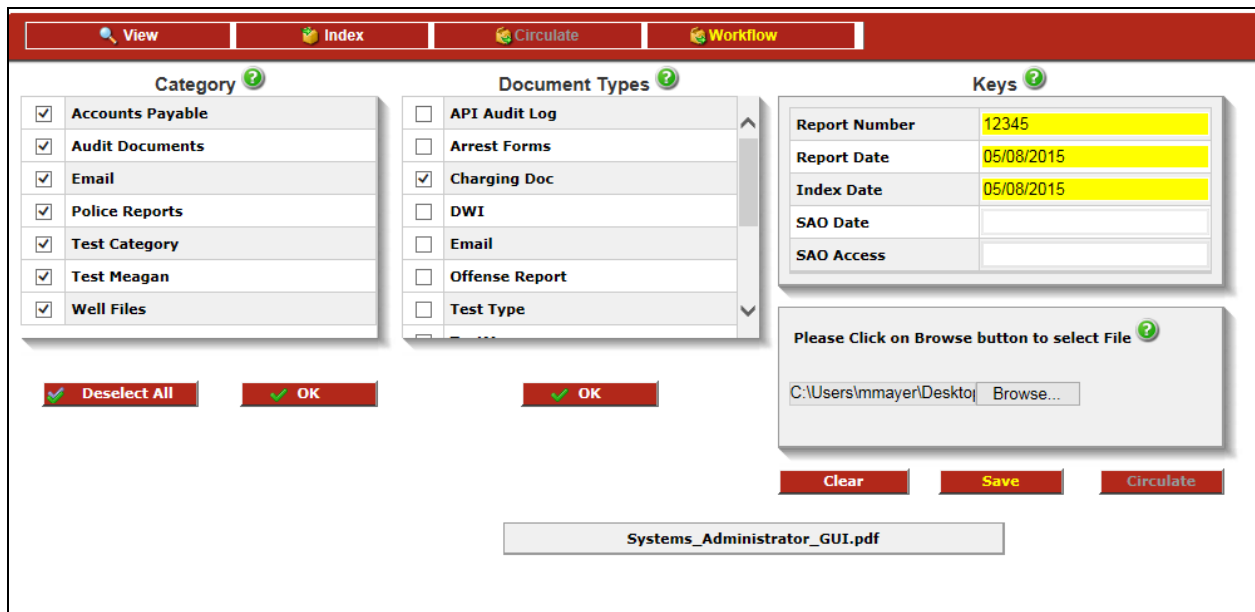
The data entry area that is highlighted in yellow are required fields. The non-highlighted data fields are optional so you may not want to enter those fields. The more information you provide, the more ways there are to search for it.

The screenshot shows the same software interface as the previous one, but now with a third panel titled 'Keys' on the right. This panel contains five fields: 'Report Number' (value: 12345), 'Report Date' (value: 05/08/2015), 'Index Date' (value: 05/08/2015), 'SAO Date' (empty), and 'SAO Access' (empty). The first three fields are highlighted in yellow. Below the 'Keys' panel is a 'Please Click on Browse button to select File' message and a 'Browse...' button. At the bottom of the interface are three buttons: 'Clear', 'Save', and 'Circulate'.

Once you have entered all the index data fields, select the document from your local directories by selecting 'Browse'.



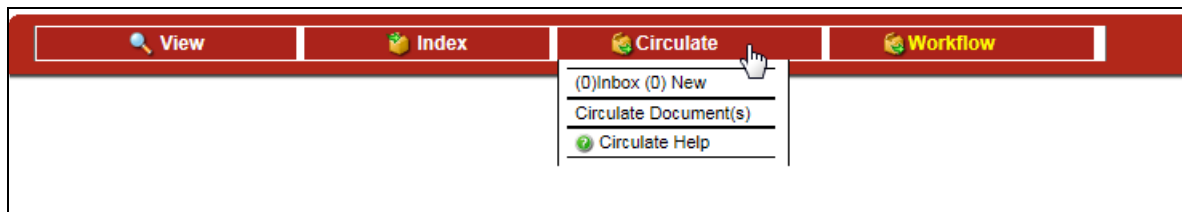
The name of the file will appear in the area next to the Browse button and on the display window on the V1A. If this is the file that meets the indexing criteria that you have defined you may save it to the image server by selecting Save. REMEMBER all the data fields highlighted in yellow MUST be completed before the file can be saved to the image server.



When you have completed the indexing and selected the Save button a message will appear on the display that says **“File uploaded successfully”**. This means that the process of copying a local file to the image server has been successfully categorized, document typed, and indexed on the image server. When completed that file is available to be viewed from V1A or any other image server client that has access rights associated with the file.

Circulate a Document

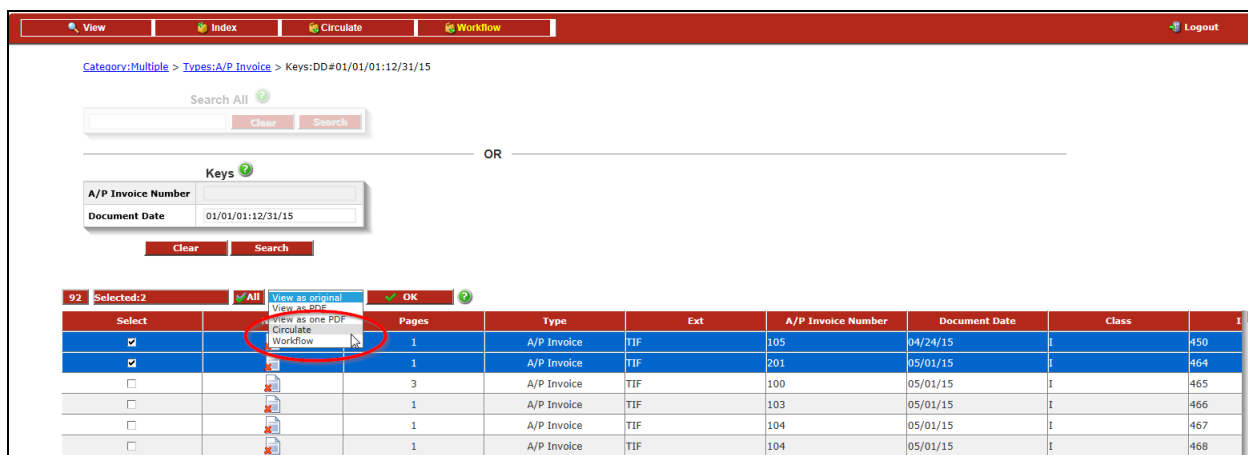
Circulation allows users to circulate a document(s) throughout an organization, perhaps for approval or even just to draw attention to a specific document. You are able to attach a note or send an notification email along with the document(s). Think of this as an ad-hoc workflow as it has no roles, routes or rules. This feature is optional and therefore maybe greyed out on the menu bar, contact your system administrator for information.



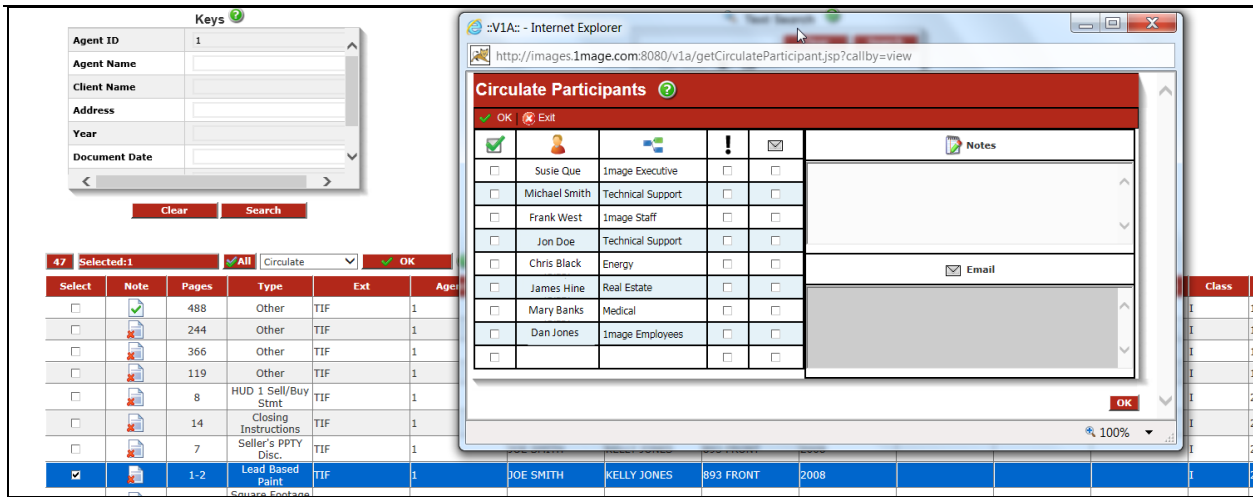
From the drop-down Circulate menu, you have 3 options; You can view your inbox, initiate a document to be circulated or get help with Circulate.

Initiating a Document into Circulation

There are a few ways to initiate the circulation process, all in which originate from the hitlist. You can access the hitlist from either the Circulate>Circulate Document(s)> Categories/Keys method or from the traditional View>Categories/Keys option. Once you have identified your search keys, executed the search, you are presented with the hitlist where you will select the documents you wish to circulate.



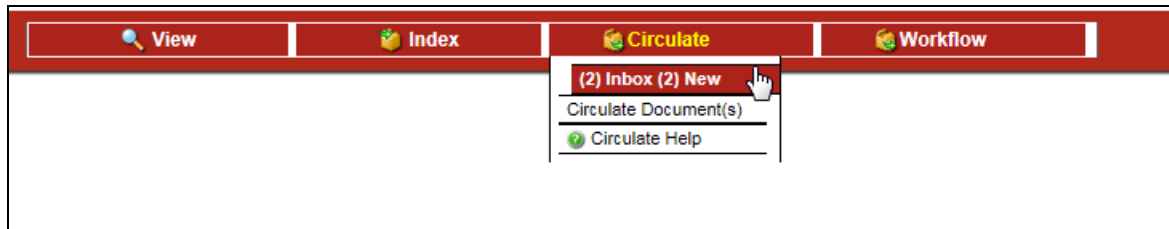
Once documents are selected use the drop down menu to select 'Circulate'. The Circulate pop-up window appears.



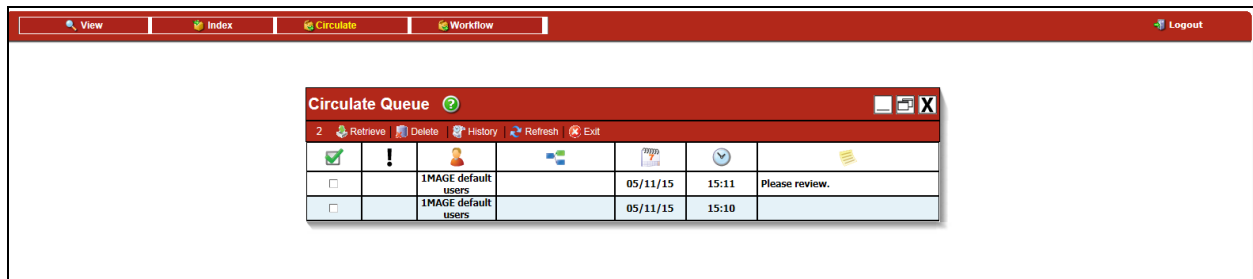
Select the contact(s) you wish the documents to be circulated to. You can also choose to have the circulation item to have a high importance by selecting the box in the ! column. This will be sent to their Circulation Inbox. Should you wish to have a notification email sent in addition, select the box in the email icon column. The Notes and Email text boxes are optional; the note will be added to the document(s)'s permanent note file and the email text will be sent in the body of the email. Clicking the OK button on the bottom right will execute the circulation.

Circulate Inbox

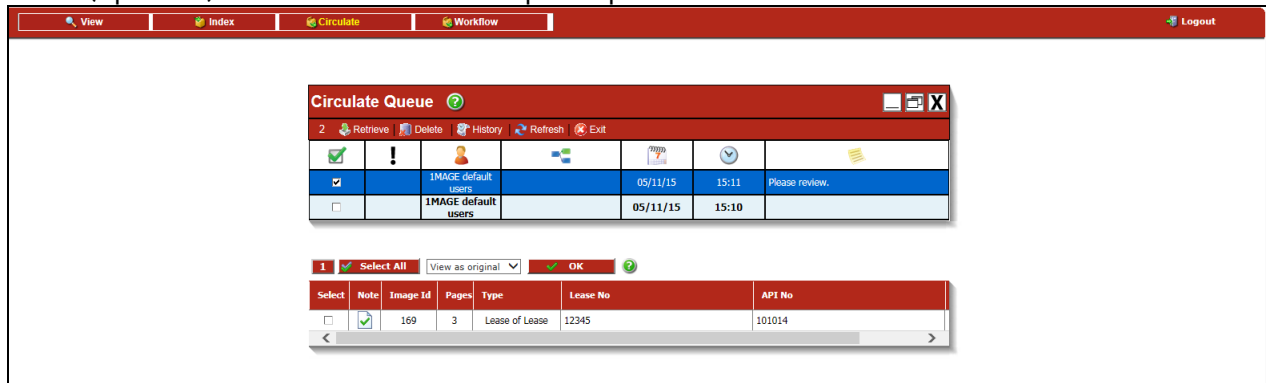
To review the documents that have been circulated to you, select 'Inbox' from the drop down Circulate menu.



Your inbox will appear with all items that have been circulated to you. In the grid you'll be able to see if it was of high importance (!), who sent it, what organization they belong to (optional), what day it was sent, what time it was sent and any note they have associated. To view the documents they circulated to you, select the line item and select 'Retrieve' from the toolbar in the Circulate Queue window. You may only retrieve ONE item at a time.



Once retrieved, the hitlist of the document(s) will appear below the Queue window. The user may now view the image or circulate it by selecting their option from the drop down list. Should you want to respond to the sender, you would need to select the circulate option, add notes (optional) and select them as the participant.

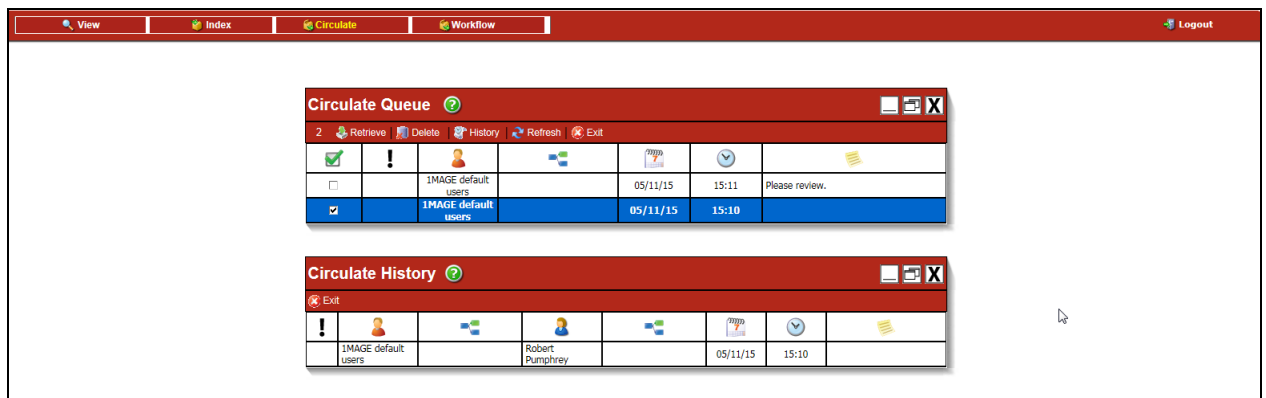


Deleting Circulated Items

Select your inbox from the Circulate Menu; select the item you wish to delete and click the 'Delete' button from the toolbar on the Circulate Queue window. This will just delete the item from your inbox, the images will still remain on the 1MAGE server.

Reviewing History of Circulated Items

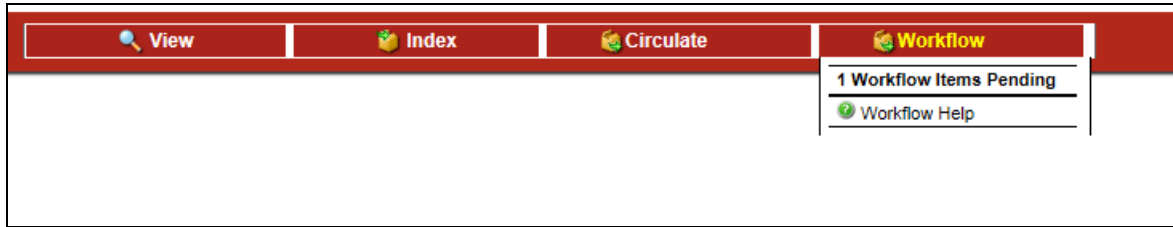
To review the path of the circulated item in your inbox, select the item in the inbox and click the 'History' button from the toolbar on the Circulate Queue window. The history window will populate below. It will display if this same item has a high importance, the sender, sender's organization, recipient, recipient's organization, the day it was sent, the time it was sent and if any note was attached.



Workflow

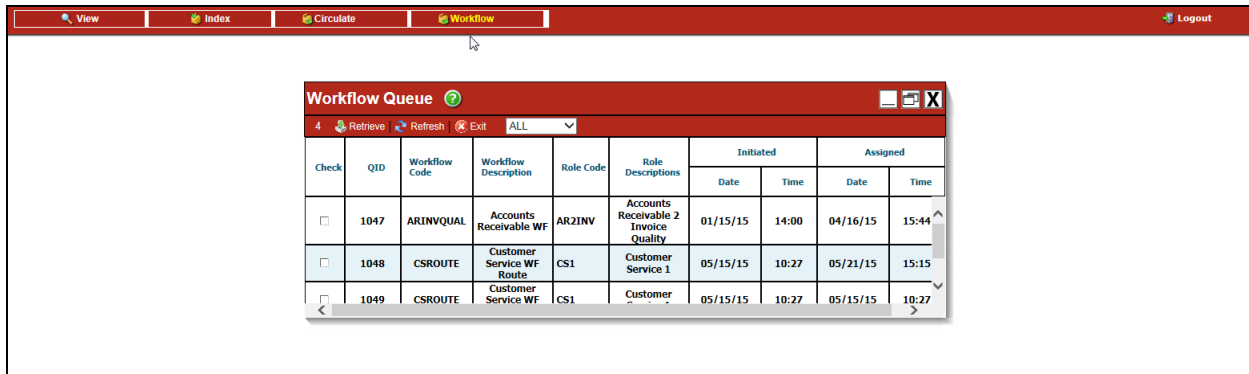
Workflow is an optional feature and may be greyed out on the menu, check with your administrator for details. Workflow allows users to send document(s) along an existing route which includes various 'stops/roles' along the way. These routes will have been previously built by a system administrator and at each stop/role the workflow item will have to be approved to continue to the next role. If it is rejected, the item will go back to the previous role for either

further information or a rejection of the entire item. A user may also wish to 'return' the item to the queue for someone in the same role to look into the item. On the Workflow drop-down menu, you have can view your inbox or access the help menu.

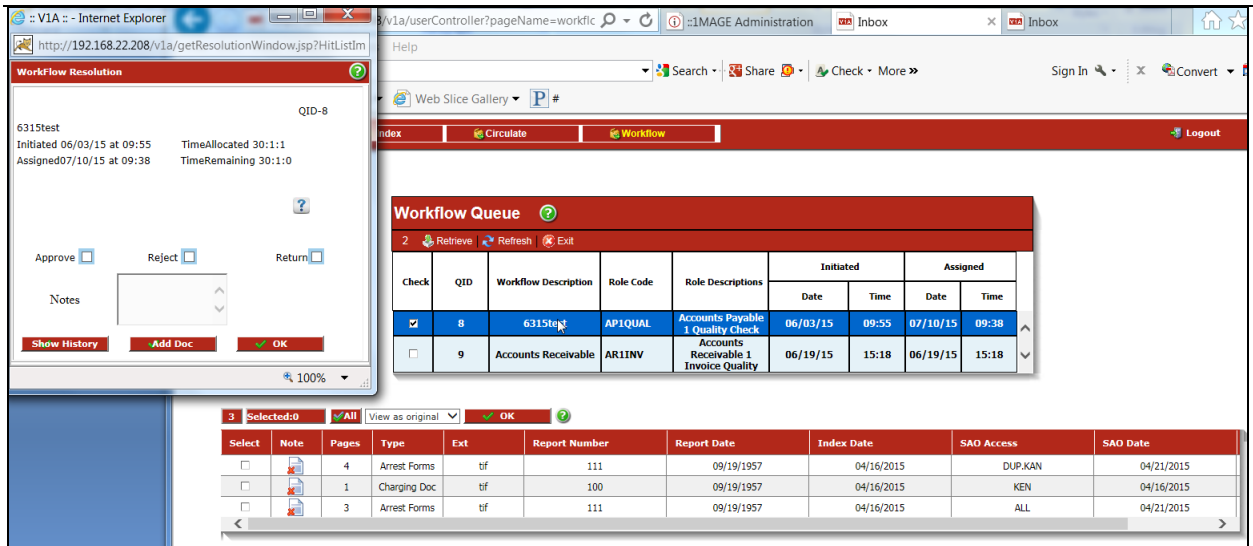


View Workflow Inbox

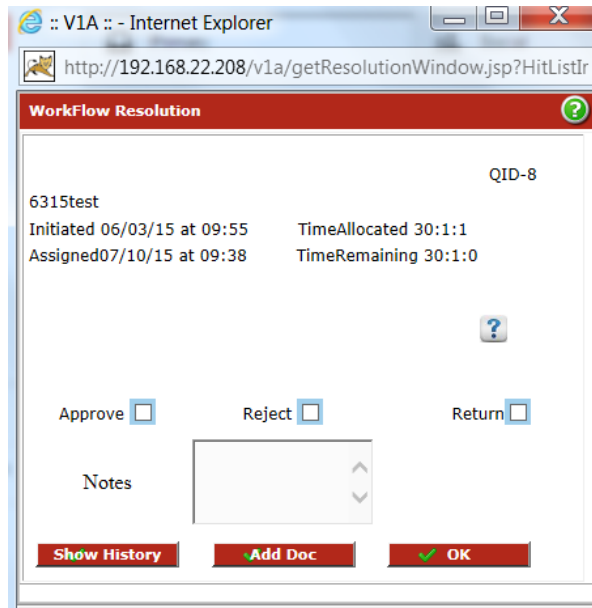
Select the '# Workflow Items Pending' from the Menu bar. The Workflow Queue window will appear, displaying all workflows available to you. Associated information is also displayed including; the ID of the workflow (unique to that individual item), the code/description of the Workflow Route the item is on, the code/description of the Role it currently is at (your role, since you are viewing it), when it was initiated and the when the last assignment was done.



To view the documents within the workflow, select the item from the Workflow Queue window and select Retrieve from the toolbar. You may only retrieve ONE item at a time. Once retrieved, the hitlist of the document(s) will appear below the Queue window as well as the resolution window. The user may now view the image(s) by selecting their option from the drop down list.



The user at this point can view the history of this item, add an additional document, approve, reject or return the item (with an optional note). The resolution window details the QID number, the workflow description, when the workflow was initiated, how much time is allocated at the current role, and time remaining.



Reviewing Workflow History

By clicking on the 'Show History' button in the resolution window, the window will expand to show details of the workflow item such as when and by whom an item was approved. To collapse the history view, select 'Hide History' at the top left of the grid.

Workflow Resolution

6315test
 Initiated 06/03/15 at 09:55 30:1:1 TimeAllocated
 Assigned 07/10/15 at 09:38 30:1:0 TimeRemaining

QID-8

Hide History

Workflow Queue

Workflow Description	Role	Status	Initiated		Assigned		Action				
			Date	Time	Date	Time	Date	Time	Next Role	User Name	Note Text
6315test	AP1QUAL	NEW	06/03/15	09:55	07/10/15	09:38	06/03/15	09:55	AP1QUAL	1IMAGE default user	-
6315test	AP1QUAL	UPDATE	06/03/15	09:55	07/10/15	09:38	07/10/15	09:38	AP1QUAL	1IMAGE default user	-

Approve Reject Return

Notes

Add Doc OK

Adding a Document to a Workflow

By clicking on the 'Add Doc' button in the resolution window, a V1A session will open and the user will be prompted to search for their desired documents.

View Index Circulate Workflow Logout

Please select either Index or View (Inquire) menu item from the Menubar.

The user can view or add the document to the retrieved workflow. Once 'Add to WF Route' is selected, a confirmation message appears and the user is brought back to the Workflow Inbox. To approve or reject, they must retrieve the workflow again.

46 Selected:0 All View as original View as PDF Add to WF Route OK

Select	Note	Pages	Type	Ext	Report Number	Report Date	Index Date
<input type="checkbox"/>		1	Vendor Invoice	TIF			05/01/2015

Approving, Rejecting or Returning a Workflow

In the resolution window, the user can decide to approve, reject or return the workflow item. If the user approves the workflow, the item will be sent to the next role or finalized if you are the final role. By rejecting the workflow, the item will go back to the previous role. You cannot reject an item if you are the first role. If you have retrieved the workflow and wish to neither approve nor reject the item, you may 'return' the workflow to the current role. This will allow

other users with the same role to review it or you may review the item at a later time. You may include a note with your selection; this note will appear in the workflow history.

SYSTEM REQUIREMENTS:

BROWSERS:

- Windows Internet Explorer
- Firefox for Macintosh
- Mozilla Firefox

DOCUMENT VIEWERS/APPLICATIONS: *these are required to enjoy the full use of V1A.*

- Adobe Reader or Adobe Acrobat
- Microsoft Image Viewer (tif) or other tif viewer
- Others: (Word, Excel, etc)