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ImageDepot Enterprise Archive Suite 3.1

eVision Item Research User Guide

Provided by:
League Item Processing Center

Developed by:



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AFS Publication Number PCT-EVUG-02072003

Printed in the USA

02/03

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Introduction




Welcome to the *eVision* Item Research Guide, a member of the *ImageDepot Enterprise Archive Suite* of software. *Advanced Financial Solutions* offers a thin client for research over the Internet, called the *eVision Client*. Any java-enabled web browser can be used to perform item queries, browse results, view front or back images, print results, and view transactions in a statement style format.

Be aware that the information in this guide may not precisely match the information you see on your PC, as every Institution's software has been installed and customized based on their own preferences. This document is intended as a guide only, and will provide the basic functionality required to navigate through the screens and functions associated with this program.



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Who This Book is For

This book is an end-user reference manual. It is for anyone responsible for:

- Conducting research over the Internet using the *eVision Client* software.

How This Book is Organized

- “Chapter One: eVision Item Research Basics” covers logging into eVision, building queries, managing query results and printing.
- “Chapter Two: Troubleshooting” covers troubleshooting problems.

Conventions Used in This Book

To promote faster recognition, this book uses the following conventions:

- Menu names and functions, dialog box elements, and button names appear in **special bold** type:
TYPE IN the **User** and **Password** information provided to you by LIPC.
- A vertical bar (|) appears between menu-function combinations:
SELECT **File |Print** from the browser’s main menu.
- Program, Desktop shortcut, Window, and Dialog Box names appear in *italic* type:
The *Query Definition* screen will appear, and you can begin a new search.
- Keystrokes or keystroke combinations appear in small caps style:
LEFT-CLICK once to place the cursor inside of the window.
- Text of special importance – tips, notes, cautions, and warnings – are surrounded by a shaded background:

Note: The information contained in the following screens may not be identical to the information displayed on your screen.



eVision Client Workstation Requirements

Following are the requirements for the *eVision Client* software:

- Windows 98 or higher.
- Internet Explorer 4.01 or higher.
- Netscape Navigator 4.5 or higher.
- Pentium II processor or higher.
- 32 megabytes of ram (memory) or higher.



Chapter 1: eVision Client Research Basics



Getting Started with the eVision Client

The *eVision Client* environment consists of an integrated set of windows, menus, and toolbars that allow you to retrieve and work with archived data as efficiently as possible. To begin working with the *eVision Client*, you must first connect to a research database

Logging into the Database

Open your preferred Internet Browser and select the following link to access the the *eVision Client* login screen: www.molipc.org

Username:

Password:

Group:

> Ready

Warning: Applet Window

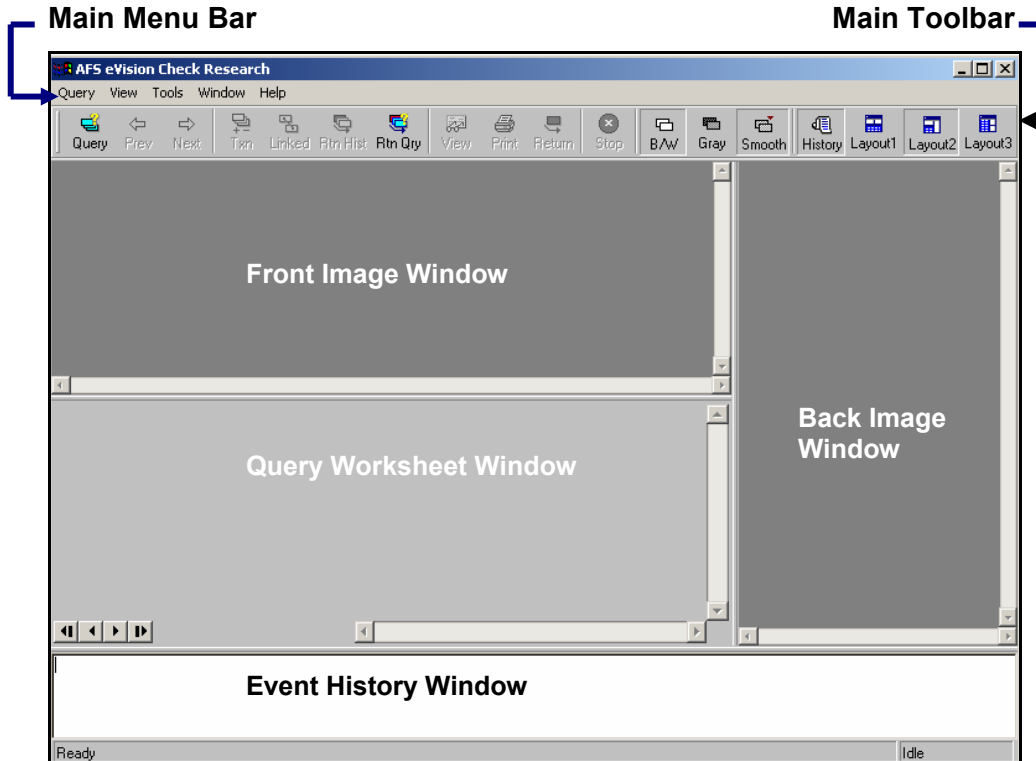
TYPE IN the **Username** and **Password** information provided to you by LIPC, and LEFT-CLICK on **Submit**.



If you receive an error while attempting to login, contact your Computer Support Personnel.

After a successful login, the *AFS eVision Check Research* window will appear, and will be used as the starting point for all research that is performed.

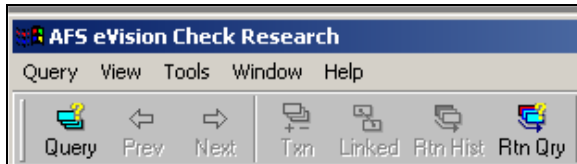
The *AFS eVision Check Research* window consists of the following major components:



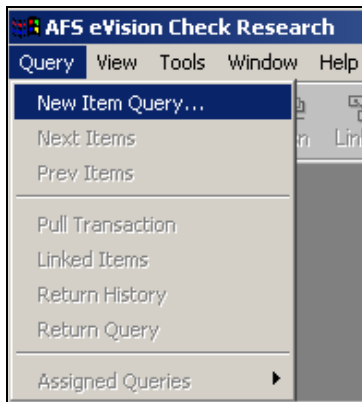


Building Item Queries

To begin building a new query, either LEFT-CLICK on the **Query** button located on the **Main** toolbar,

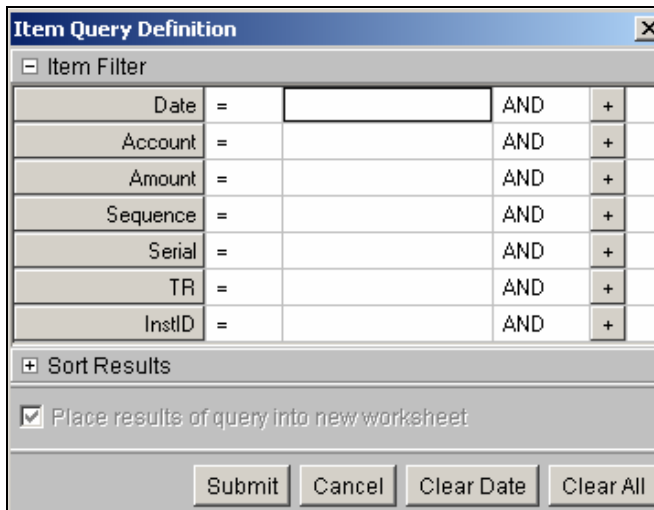


or SELECT **Query | New Query** from the **Main** menu.



Note: The information contained in the following screens may not be identical to the information displayed on your screen.

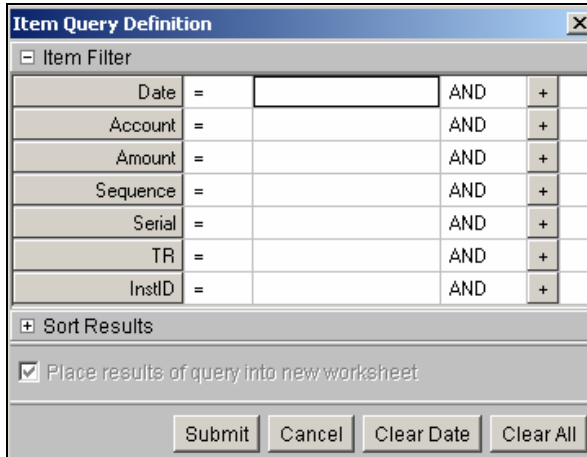
The *Query Definition* screen will appear.



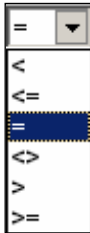


The *Query Definition* screen is used to build and launch item queries, and consists of several components. The components and their use in constructing item queries are described below.

Query Fields - All available search fields are listed in this section of the *Item Filter* screen, including the **Combo List** boxes and **Query Field Value** boxes.



Combo List box - The **Combo List** box is a drop-down menu with a list of available mathematical operands. To acquire the list, LEFT-CLICK once on the drop-down arrow.



Available operands are: (Less Than <), (Less Than or Equal To <=), (Equal To =), (Not Equal To <>), (Greater Than >), (Greater Than or Equal To >=).

Query Field Value box - The **Query Field Value** box is a long, white box beside each field name that is used to ENTER the search information into.



To ENTER information into a **Query Field Value** box, place the mouse pointer inside the box and LEFT-CLICK once in order to acquire a cursor, then TYPE IN the search information.



Date Query Field Value box - The **Date Query Field Value** box is used to Enter or SELECT a process **Date**, and contains two small arrows and a large arrow.

[-] Item Filter				
Date	=		AND	+

In order to SELECT or ENTER a **Date**, first choose the correct mathematical operand from the **Combo List** box, and then perform one of the following:

Either LEFT-CLICK once inside of the **Query Field Value** box to acquire a cursor, and then TYPE IN the **Date**;

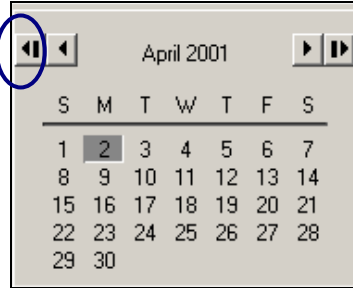
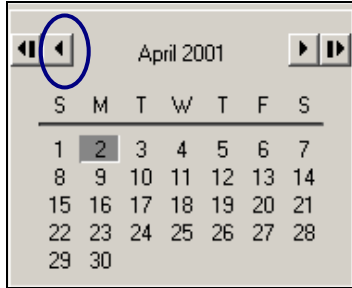
Item Query Definition [X]				
[-] Item Filter				
Date	=	01/07/	AND	+

(Once a **Date** has been SELECTED or ENTERED, you can then use the small arrows to change the month, day or year by one increment per MOUSE-CLICK).

or use the large drop-down arrow to display a calendar from which you can SELECT a **Date**.

Item Query Definition [X]																																																					
[-] Item Filter																																																					
Date	=	04/02/2001	AND	+																																																	
Account	=																																																				
Amount	=																																																				
Sequence	=																																																				
Serial	=																																																				
TR	=																																																				
InstID	=																																																				
<table border="1"> <tr> <td colspan="7">April 2001</td> </tr> <tr> <td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td> </tr> <tr> <td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td> </tr> <tr> <td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td> </tr> <tr> <td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td> </tr> <tr> <td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td> </tr> <tr> <td>29</td><td>30</td><td></td><td></td><td></td><td></td><td></td> </tr> </table>					April 2001							S	M	T	W	T	F	S	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
April 2001																																																					
S	M	T	W	T	F	S																																															
1	2	3	4	5	6	7																																															
8	9	10	11	12	13	14																																															
15	16	17	18	19	20	21																																															
22	23	24	25	26	27	28																																															
29	30																																																				
+ Sort Results																																																					
<input checked="" type="checkbox"/> Place results of query into new worksheet																																																					
<input type="button" value="Submit"/> <input type="button" value="Cancel"/> <input type="button" value="Clear Date"/> <input type="button" value="Clear All"/>																																																					

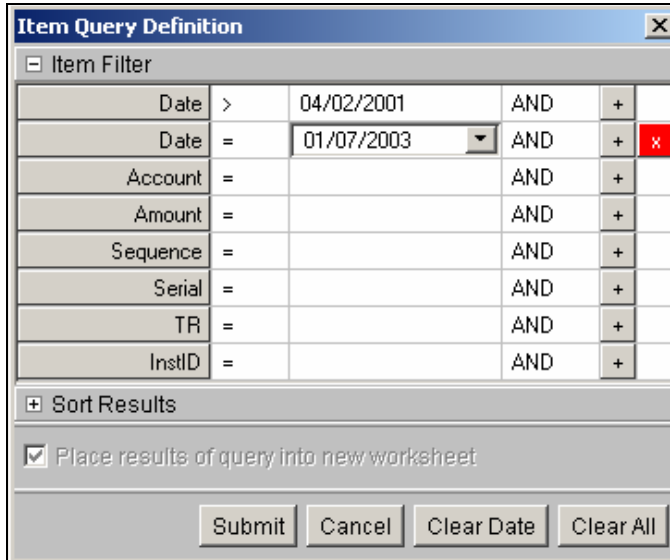
The arrows pointing left and right at the top of the calendar are for scrolling backward or forward by months or by years.



Scroll back or forward by month.

Scroll back or forward by year.

AND Control box - There will be occasions when it is necessary to search for a range of a particular field, such as a range of **Dates** or a range of **Amounts**.



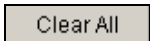
To set up a range, first **SELECT** the appropriate mathematical operand from the **Combo List** box, and then Left-Click on the + button. This will add another **Combo List** box and **Query Field Value** box below the select field, and allow you to **ENTER** the starting and ending ranges for a particular field. Left-Click on the red X to delete the additional field.



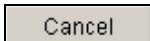
Submit button - will submit the current query.



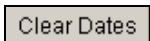
Clear All button - If you make a mistake while ENTERING any of the information for a query, you can SELECT the **Clear All** button at the bottom of the screen, and this will clear all of the entries in the query fields so that you can start over.



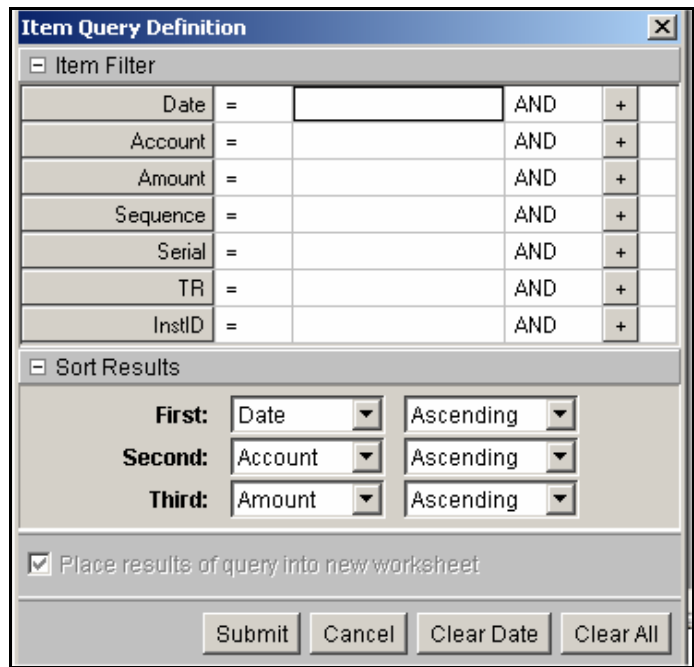
Cancel button - SELECT the **Cancel** button to cancel a query, which will also close the *Query Definition* screen.



Clear Dates button - Use the **Clear Dates** button to clear the entries in the **Date** fields.



Sort Results - To sort the results of a query, use the **Sort Results** option. You can sort any of the available fields listed on the *Query Definition* screen. Prior to submitting a query, LEFT-CLICK on the drop-down arrow beside the **First:** option to sort by a single field, and use the **Second:** option to sort by a second field within the first. The **Third:** option lets you sort a field within the second and first option.



For example, if you are going to perform a query for several items over a range of **Accounts**, then it might help to sort the results by **Account**. (You could then sort the **Amounts** as a secondary field within **Accounts** by SELECTING **Amount** from the **Second:** field).



Submitting a Query

Once you have ENTERED all of the information for the desired query, SELECT the **Submit** button to execute the query.

A dialog box with a grey background. At the top, there is a checked checkbox followed by the text "Place results of query into new worksheet". Below this, there are four buttons: "Submit", "Cancel", "Clear Date", and "Clear All".

<input checked="" type="checkbox"/> Place results of query into new worksheet			
Submit	Cancel	Clear Date	Clear All

After a few seconds, the query results will be returned to your PC, or you will receive an error that the operation could not be performed. Check your syntax in case of an error, and try to resubmit the query. If errors persist, contact your Computer Support Personnel.

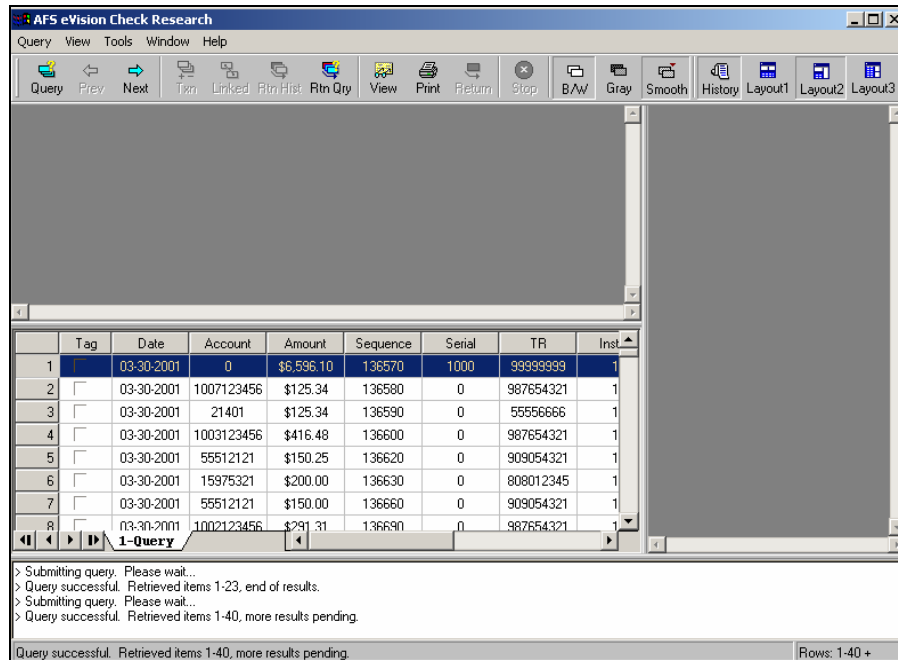


Managing the Query Results

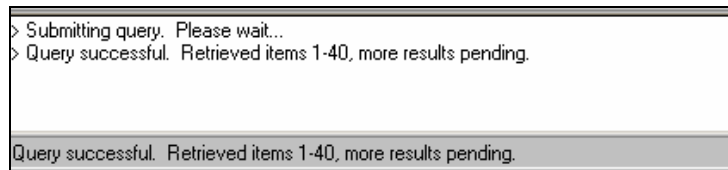
The following section will assist you with navigating through the query results, including viewing and printing images, and transaction research if it is available.

Retrieving Items

After a successful query has been performed, the results will be loaded into the *Query Worksheet*. The number of items that get returned at one time is a configurable option that is set by your Institution's Administrative staff. The default setting is 40 items at one time. (This is done for performance reasons, and the number of retrieved items could vary). If your query returns more than the default setting, you will need to use the **Next** button on the **Main** toolbar to access the next set of items.



At the bottom of the *eVision Check Research* screen there is an *Event History* window that keeps track of recent activity.



Notice the text message that reads: **Query Successful. Retrieved items 1-40 – More results pending.** This means that there are currently 40 items available to be viewed, and that there are more items waiting to be retrieved.



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Use the **Next** and **Prev** options on the **Main** toolbar to view the next set of items, or to return to the previous set of items.



Viewing Images

In order to view an image, you must HIGHLIGHT the item in the worksheet that you wish to view, and then SELECT the **View** button on the **Main** toolbar.



This tells the program to fetch the requested images for the highlighted item.

The screenshot displays the AFS eVision Check Research application. The main window shows a deposit ticket for Jack Smith at Buckeye Bank, dated 9-1-2000. The ticket includes a table for currency and coin, a sub-total of \$50.00, and a total deposit of \$120.00. To the right is a 'PROPERLY ENDORSE ALL ITEMS' section with a grid for checks and a cash count section.

Tag	Date	Account	Amount	Sequence	Serial	TR	Inst
1	03-30-2001	1008123456	\$100.00	136640	0	987654321	1
2	03-30-2001	15975321	\$100.00	137100	0	808012345	1
3	04-02-2001	1008123456	\$100.00	133720	1008	987654321	0
4	04-02-2001	1008123456	\$100.00	135090	1008	987654321	0
5	04-02-2001	1003123456	\$100.00	135350	0	987654321	1
6	04-02-2001	1005123456	\$100.00	135370	0	987654321	1
7	04-02-2001	1002123456	\$100.00	135390	0	987654321	1
8	04-02-2001	1001123456	\$100.00	135410	0	987654321	1

Below the table, a status bar shows: > Image successfully loaded (Front)
> Querying for transaction items. Please wait...
> Query successful. Retrieved items 1-3, end of results.
> Submitting query. Please wait...
> Query successful. Retrieved items 1-23, end of results.
Query successful. Retrieved items 1-23, end of results. Rows: 1-23

Once the images have been retrieved, you can use the following options to enhance or manipulate the viewing environment.



Changing the Image Layout

To change the way the images are displayed in the *AFS eVision Check Research* window, choose from the three **Layout** buttons on the **Main** toolbar.



Layout 1 allows you to see more of the *Query Worksheet*, but makes the images a bit smaller. If you have a large monitor, this would be the preferred layout.

Tag	Date	Account	BankNum	Serial	Amount	Sequence	TrnCode	TR
1	02-12-2001	1001123456	0	0	\$11,375.00	136100	20	987654321
2	02-12-2001	21602	0	0	\$175.00	136110	0	5556611
3	02-12-2001	8523698	0	0	\$200.00	136120	1005	707054321
4	02-12-2001	15975321	0	0	\$150.00	136130	1036	808012345
5	02-12-2001	55512121	0	0	\$10,000.00	136140	1006	909054321
6	02-12-2001	1011123456	0	1004	\$1,200.00	136150	0	987654321
7	02-12-2001	1004123456	0	0	\$161.21	136160	20	987654321

Layout 2 is the default setting. The images are a bit larger, but less worksheet viewing area is available.

Tag	Date	Account	BankNum	Serial	Amount	Sequence
1	02-12-2001	1001123456	0	0	\$11,375.00	136100
2	02-12-2001	21602	0	0	\$175.00	136110
3	02-12-2001	8523698	0	0	\$200.00	136120
4	02-12-2001	15975321	0	0	\$150.00	136130
5	02-12-2001	55512121	0	0	\$10,000.00	136140
6	02-12-2001	1011123456	0	1004	\$1,200.00	136150



Layout 3 places both images to the right of the worksheet.

	Tag	Date	Account	BankNum	Serial
1	<input type="checkbox"/>	02-12-2001	1001123456	0	0
2	<input type="checkbox"/>	02-12-2001	21602	0	0
3	<input type="checkbox"/>	02-12-2001	8523698	0	0
4	<input type="checkbox"/>	02-12-2001	15975321	0	0
5	<input type="checkbox"/>	02-12-2001	55512121	0	0
6	<input type="checkbox"/>	02-12-2001	1011123456	0	100
7	<input type="checkbox"/>	02-12-2001	1004123456	0	0
8	<input type="checkbox"/>	02-12-2001	21401	0	0
9	<input type="checkbox"/>	02-12-2001	1003123456	0	101
10	<input type="checkbox"/>	02-12-2001	1007123456	0	0
11	<input type="checkbox"/>	02-12-2001	21602	0	0
12	<input type="checkbox"/>	02-12-2001	15975321	0	0
13	<input type="checkbox"/>	02-12-2001	1011123456	0	100
14	<input type="checkbox"/>	02-12-2001	1005123456	0	0

The interface shows a deposit slip with the following details:

- DATE: 02-12-2001
- ACCOUNT: 1001123456
- AMOUNT: 1,137.61
- DEPOSIT TICKET: 1001123456
- ACCOUNT: 1001123456
- AMOUNT: 1,137.61
- DEPOSIT TICKET: 1001123456

The MICR line at the bottom of the slip reads: @R976543210 #1001123456*

Any Layout settings that are modified are not saved, and must be re-applied each time you login to the eVision Client program.



Smoothing an Image

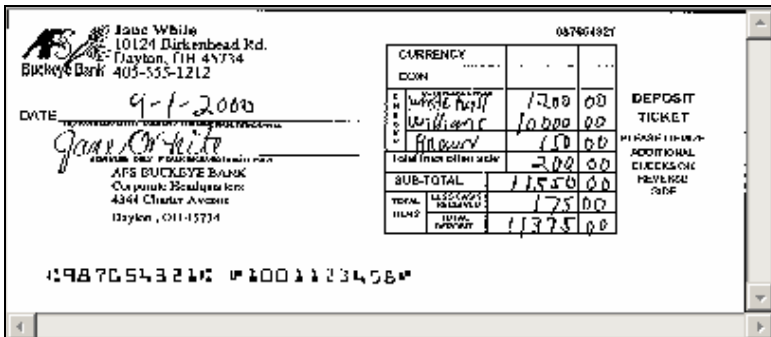
Use the **Smooth** button on the **Main** toolbar in order to enhance the sharpness of an image while viewing.



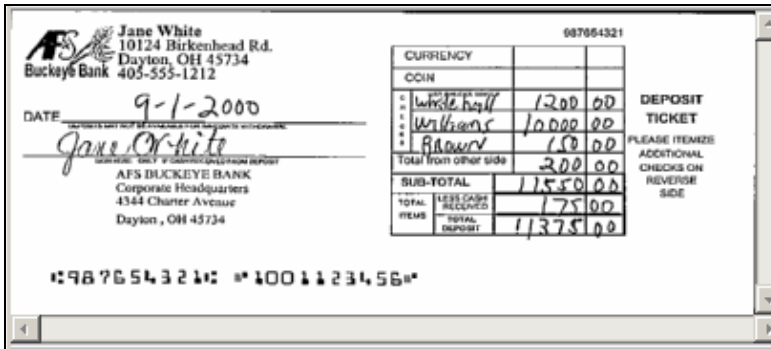
Note: A 'smoothed' image will still print in its original form. Smooth is for viewing purposes only.

In the examples below, notice the difference in the way the images look after applying the **Smooth** option.

Before applying the **Smooth** option.



After applying the **Smooth** option.



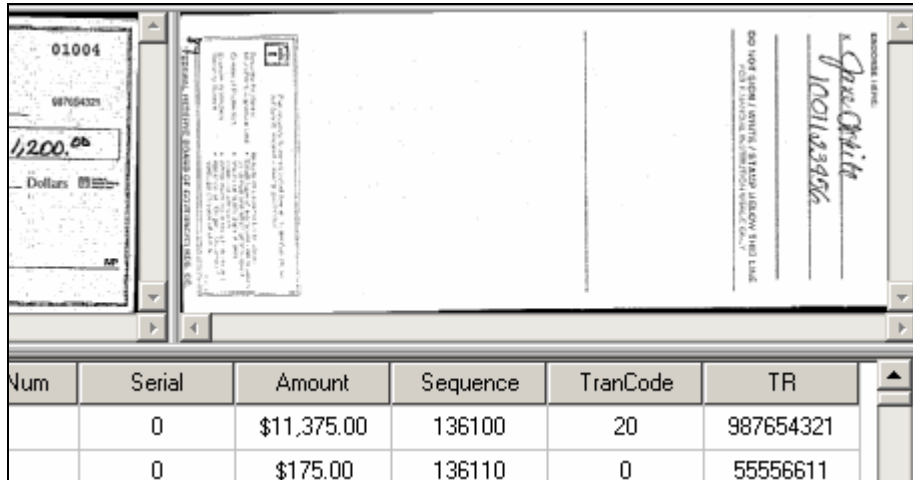
The **Smooth** option works with black and white images, as well as gray-scale images.



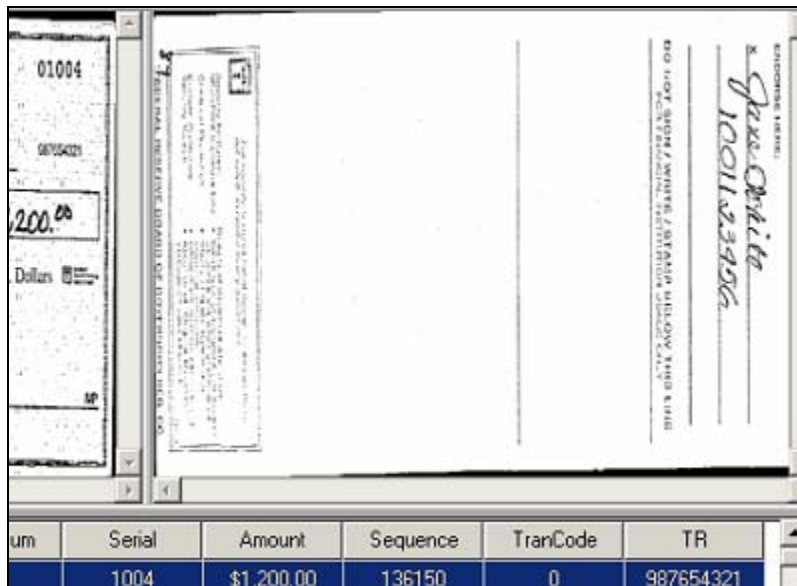
The **Smooth** option must be re-applied each time you login to the *eVision Client* program.

Zooming an Image

At times it may be necessary to enlarge an image, especially a back image, in order to see the small print.



To enlarge an image, simply place the mouse pointer over the bottom border of the image window, (both borders will need to be adjusted), LEFT-CLICK and HOLD the button down, and then DRAG the border downward to make the image window larger. (CLICK AND DRAG). Do the same with the side border of the image.



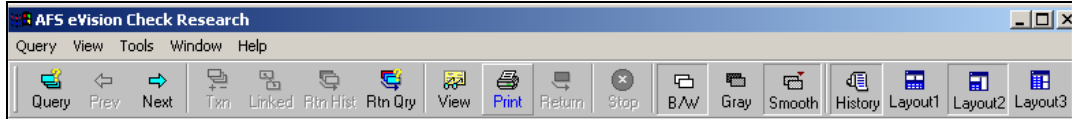
DRAG the borders back to their original positions to correct the window size.

Printing

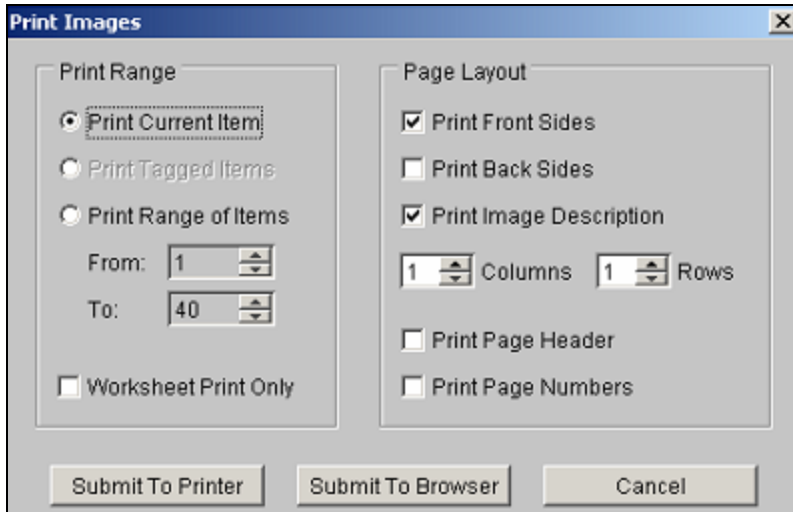
The following section will assist you with printing from the *eVision Client*.

Printing Items

To print an item or items from the *eVision Client*, LEFT-CLICK on the **Print** button located on the **Main** toolbar.



The *Print Images* screen will appear, allowing you to format the print first.



Print Range

The **Print Range** section contains the following configuration options:

Print Current Item - Will print the currently highlighted item in the worksheet.

Print Tagged Items - Will print the tagged items in the worksheet. This option is grayed out unless there are items tagged to be printed.

	Tag	Date	Account	BankNum	Serial
1	<input checked="" type="checkbox"/>	02-12-2001	1001123456	0	0
2	<input type="checkbox"/>	02-12-2001	21602	0	0
3	<input checked="" type="checkbox"/>	02-12-2001	8523698	0	0
4	<input type="checkbox"/>	02-12-2001	15975221	0	0



Print Range of Items - Will print a range of items based on the row numbers ENTERED into the From and To boxes.

	Tag	Date	<input checked="" type="radio"/> Print Range of Items From: <input type="text" value="1"/> To: <input type="text" value="4"/>
1	<input type="checkbox"/>	02-12-2001	
2	<input type="checkbox"/>	02-12-2001	

Worksheet Print Only - Will print the entire worksheet in a spreadsheet format.

Worksheet Print Only

AFS eVision Check Research							
Date	Account	BankNum	Serial	Amount	Sequence	TranCode	TR
02-12-2001	1001123456	0	0	\$11,375.00	136100	20	987654321
02-12-2001	21602	0	0	\$175.00	136110	0	55556611
02-12-2001	8523698	0	0	\$200.00	136120	1006	707054321
02-12-2001	15975321	0	0	\$150.00	136130	1036	808012345
02-12-2001	55512121	0	0	\$10,000.00	136140	1006	909054321
02-12-2001	1011123456	0	1004	\$1,200.00	136150	0	987654321
02-12-2001	1004123456	0	0	\$161.21	136160	20	987654321
02-12-2001	21401	0	0	\$111.21	136170	0	55556666

Page Layout

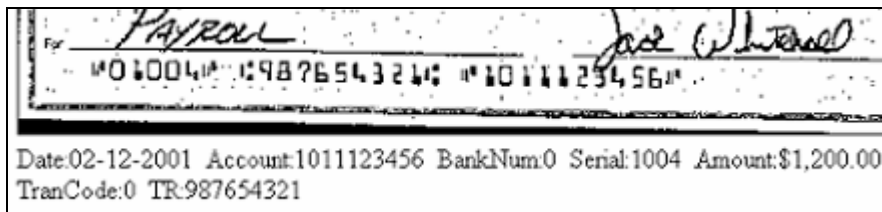
The **Page Layout** section contains the following configuration options:

Print Front Sides - Will print just a front image.

Print Back Sides - Will print just a back image.

CHECK them both to print front and back images.

Print Image Description - Will print the available field information under the image.



Columns / Rows - Will allow you to print large images or small images.



For example, if you wanted to print a large front and back image on one sheet of paper, (front image on top and back image under the front), you would set the **Columns** to '1', and the **Rows** to '2'.

Page Layout

Print Front Sides

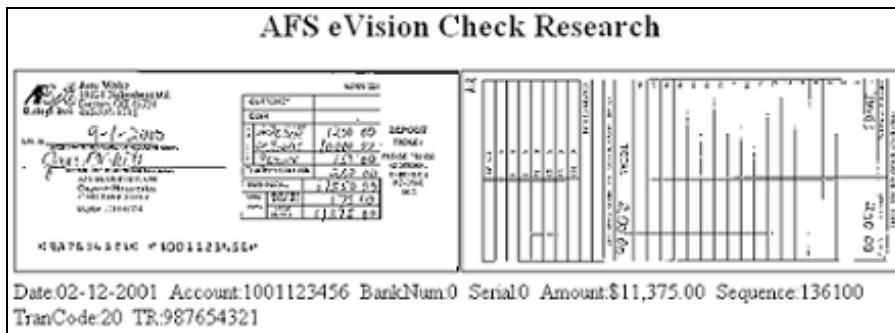
Print Back Sides

Print Image Description

1 Columns 2 Rows

Large images will stretch across the entire width of the printed page.

If the **Columns** are set to '2', smaller images will be printed side by side. The more **Columns** that are designated, the smaller the images will become.



Tip: You can comfortably fit 5 front images and 5 back images side-by-side on one printed page, including a header and a footer. (2 Columns and 5 Rows).

Print Page Header - Will place a pre-defined header at the top of each printed page. Page headers are configured by LIPC.

Print Page Numbers - Will place the page number on each printed page.

Print Page Header

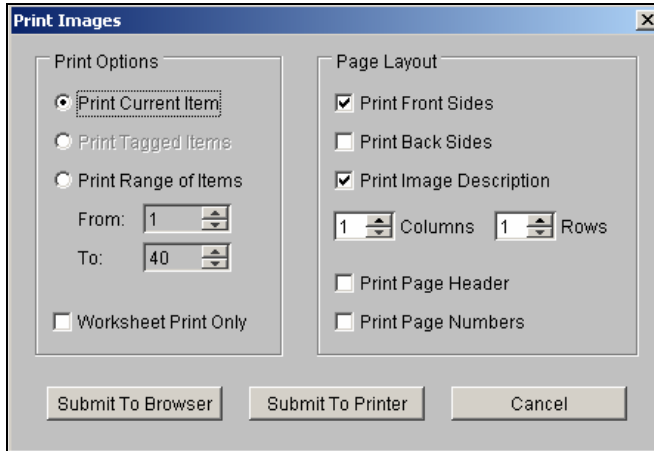
Print Page Numbers

Note: If submit print directly to a printer, the defined columns and rows will be reflected. If submitted to the browser, Internet Explorer will decide the number of rows in a page.



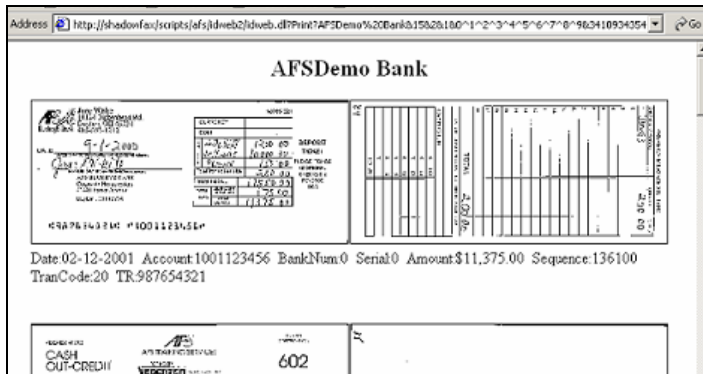
Previewing the Print

Once you have all of the options in place that you wish to print with, LEFT-CLICK on the **Submit To Browser** button on the *Print Images* screen in order to preview the printout.

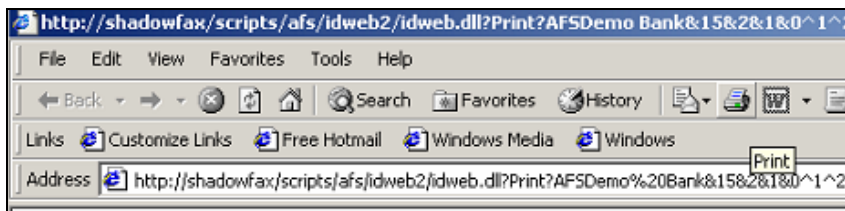


(SELECT the **Cancel** button to close the *Print Images* window and cancel the print).

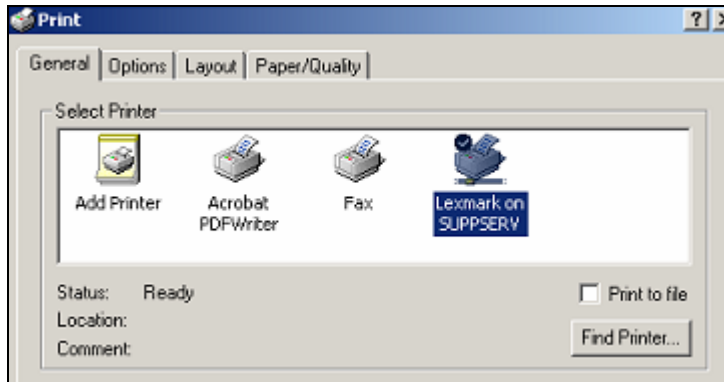
The preview will appear in your browser window, which will give you a chance to confirm your print settings prior to sending it to the printer.



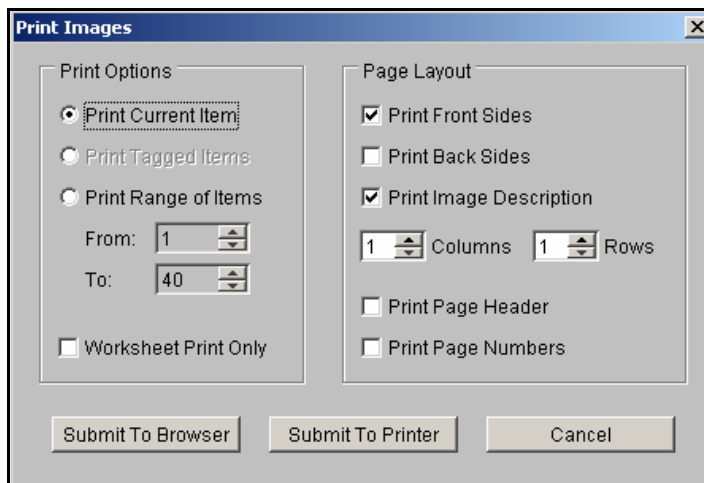
When you are satisfied with the print configuration, SELECT the **Print** option on your browser's toolbar.



SELECT the desired printer and any additional options you wish to print with, and then LEFT-CLICK on **Print**.



If you don't wish to preview the print first, you can SELECT the **Submit To Printer** option. This will send the print straight to your *Windows* default printer.



Warning: Submit to printer is designed to expedite a high volume print. If submitted directly to a printer, Java might have a problem talking to the specific printer drivers. To correct this, print to the browser first, then submit to the printer.



The Worksheet Context Menu

All worksheets contain a **Context** menu of options which is made available by RIGHT-CLICKING inside of the selected worksheet. The available options are:

View Check - Retrieves the images for the highlighted item.

Get Next Items - Retrieves the next set of items

Get Prev Items - Retrieves the previous set of items.

Pull Transaction - Pulls the items associated with the highlighted deposit slip. Not applicable.

Get Linked Items – Pulls linked items. Not applicable.

Get Return History – Pulls return history items. Not applicable.

Close Tab - Closes the currently selected tab or worksheet.

Close All Tabs - Closes all of the open tabs or worksheets.



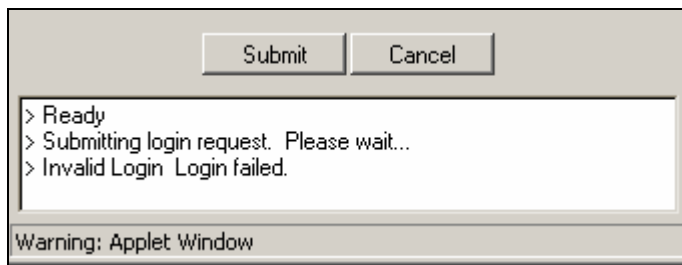
Chapter Two: TroubleShooting



Troubleshooting Problems

The following section covers some of the general problems that might occur while performing research with the *eVision Client* software. The first place to check if an error occurs is the *Event History* window at the bottom of the screen.

Logging into the Database



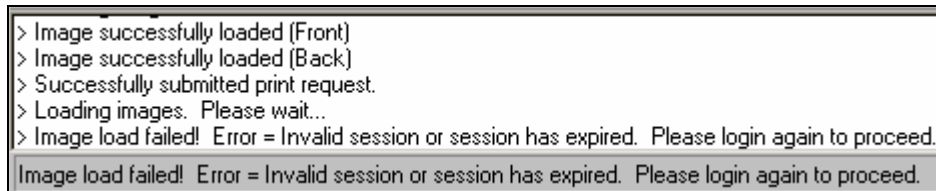
If you have problems logging in, check your syntax for errors, and remember that passwords are case sensitive. Contact your Support Personnel if problems persist.

Querying



If you receive the errors listed above after submitting a query, it means that you have exceeded the time-out limit for inactivity. You will have to close out of the program and login again. Contact your Support Personnel to find out what the time limit is for inactivity.

Viewing





If you receive the errors above while trying to view an image, it means you have exceeded the time-out limit for inactivity. You will have to close out of the program and login again. Contact your Support Personnel to find out what the time limit is for inactivity.

Printing



If you receive the errors above while trying to print an image, it means you have exceeded the time-out limit for inactivity. You will have to close out of the program and login again. Contact your Support Personnel to find out what the time limit is for inactivity.