

Using R/View for CD-ROM Retrieval of CU*SPY Member Statements and Reports

In 2002 CU*Answers changed its CD ROM statement and report archival and retrieval system, formerly Magellan's SpyView/CS, to a new system by **Tronitech**—a familiar name to many credit unions as your microfiche processor. This was the first step in a whole new era of data retrieval and long-term data storage for CU*Answers and our clients.

Tronitech is a national player in the business of data retention and has been a long term CU*Answers partner for meeting client microfiche needs. Their CD ROM statement retrieval system, called **R/View**, addresses every concern credit unions have expressed with the previous product, at an equivalent price.

R/View System Features

- The CD is created from the monthly fiche file CU*Answers transmits to Tronitech. Each CD contains the viewing software - no software or data files need to be installed on a PC in order to view or print statements or reports. Upgrades, if any, to the R/View software are automatically included on the CD, so you never need to install anything.
- The entire CD, including the viewing software and the statement or report files, can be copied onto a shared network drive for viewing in a network environment. (See Page 3 for more details.) Network printing is also supported.
- CU*Answers pays for the software licensing fees. There are no initial startup costs to you, and will be no annual maintenance charges for future software upgrades. You only pay a per-page fee for the statements/reports and a flat fee for each CD created. (See Page 2 for details on pricing.)
- Statement CDs will be produced and mailed to you once each quarter. Report CDs will be produced and mailed once each month.

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Specifications

Hardware Requirements

These specifications represent the minimum configuration for retrieving documents from a Tronitech CD-ROM.

- PC running Microsoft Windows 3.1 or above
- 16 Mb RAM
- CD-ROM drive
- Laser or bubblejet printer (dot matrix not supported), either standalone or network.
- Because of the time required to search through files, faster CPU speed will result in more efficient retrieval time.

Pricing

- Production of statements or reports: \$0.01 per page
- Cost for each CD: \$25 per CD used
- Additional copies are available for \$25 per CD and must be ordered in advance.

IMPORTANT NOTE REGARDING STATEMENT BACKUP

If you do not plan to copy your CDs to a network location that is routinely backed up, it is essential that you determine a disaster recovery plan in case the CD is damaged or destroyed. Extra copies of each quarter's CD can be ordered in advance but cannot be produced as a standalone CD after the initial CD burn. Therefore, we recommend you either copy the contents of the CD to a backup location (see below) or purchase at least two copies of the CD each quarter. Contact Patty Dora (ext. 136 or pdora@cuanswers.com) for details.

Using R/View Files On a Network

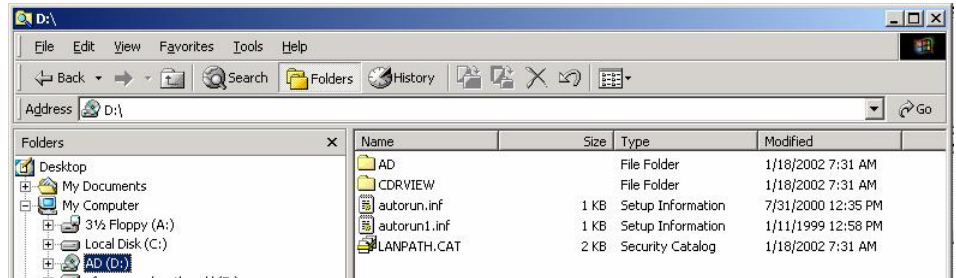
Use these steps if you wish to make archived documents available for everyone on your network, or to make a backup copy of the CD. (These instructions are for Windows 98; specific steps may be slightly different for other versions of Windows.)

Copying the Files

Use these steps to copy the contents of a CD to a shared location.

1. Insert the CD into the CD-ROM drive. If R/View launches automatically, close it.

1. Launch Windows Explorer, then select your CD drive icon.



2. From the **E**dit menu, choose **S**elect **A**ll.

3. From the **E**dit menu, choose **C**opy.

4. Navigate to the shared network drive. With that drive or main folder selected, choose **F**ile, **N**ew, **F**older. Type a name for the new folder that matches the name on the CD (for example, “1st Qtr 2002 Statements”) and press Enter.

5. Right-click on the new folder just created, and choose **P**aste.

Creating a Desktop Shortcut

To make it easier for staff to access archived files, you may wish to create shortcuts on the PC’s desktop (or other location). Repeat the steps on each PC that will be used to access archived documents from the network drive. (NOTE: A separate shortcut is required for each CD that was copied to the shared location.)

1. Launch Windows Explorer.

2. Navigate to the shared location of the CD files (open the folder created in Step 5 above) and open the **CDRVIEW** folder.

3. Right-click on the file **Rview.exe** and drag it to the PC’s desktop (or other desired location). When you let go of the mouse, a menu will appear. Choose **Create Shortcut(s) here**.

OR

Right-click on the file **Rview.exe**. Choose **Create Shortcut**. A new file will be created called **Shortcut to Rview.exe**. Drag this to the PC’s desktop (or other location).

4. Right-click on the shortcut and choose **Rename**. Type a name that describes the files in that folder (such as “1st Qtr 2002 Statements”) and press Enter.

To view archived documents, simply double-click the shortcut and proceed with the same procedures used for viewing from the CD.

Viewing and Printing a Statement

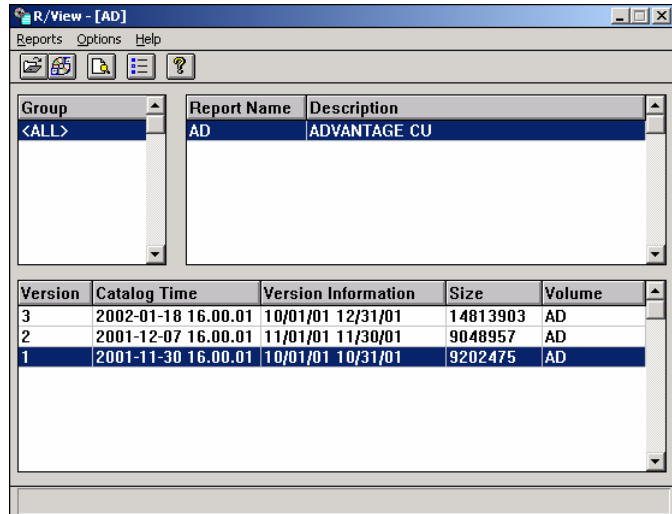
Use these instructions to quickly view a specific member's statement using R/View. See Page 8 for details on using other R/View features to work with your statements. (Viewing reports is covered starting on Page 6.)

1. Insert the CD into your CD-ROM drive.

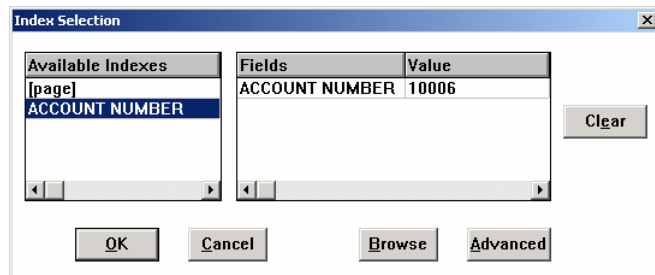
Depending on how your PC is set up, the R/View program may start automatically in a few seconds. If it does not, click the **Start** button, select **Run** and type the following (for the D, substitute the drive letter that represents your CD drive) and click OK:

D:\CDRVIEW\Rview.exe

2. The first dialog box shows a list of statements contained on the CD. Select a statement period by double-clicking one of the items in the list at the bottom.




3. Next, the Index Selection dialog box will appear. From here you may search for any statement by page number or account number. (See Page 8 for more information on other features available in this dialog box.)



To go directly to a member's statement, select **ACCOUNT NUMBER** under "Available Indexes," then enter the account number under "Value" and click OK to search for that statement.

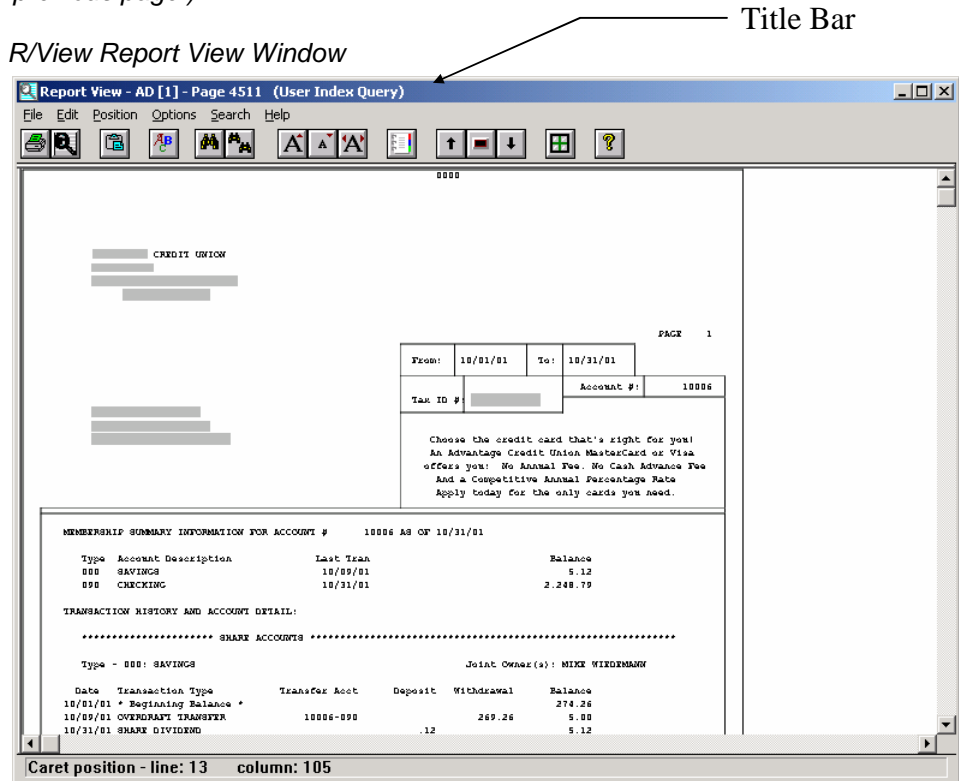
- NOTE: You **DO NOT** need to enter leading spaces or zeros. For account number 1273, simply type 1273 in the "Value" field. When you click OK, the first account that begins with those four digits will be displayed first.




If this is not the right statement, click the *Next Index Entry*  button until the correct statement is displayed before proceeding to the next step.

The first page of the statement will be displayed on the Report View screen (shown below). Before printing, you must verify how many pages are actually in this statement.

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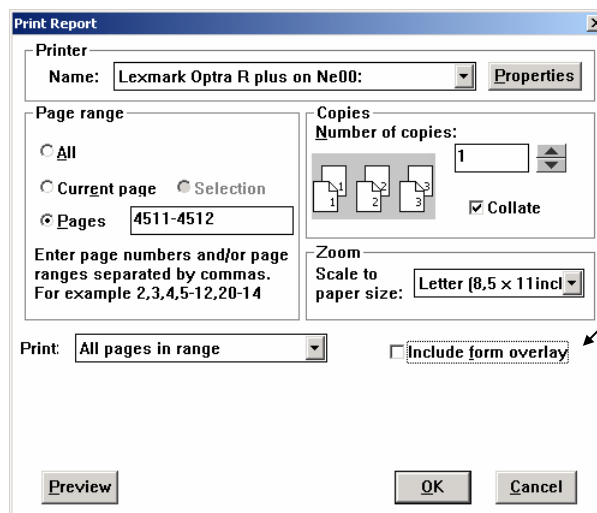


4. Click the *Select Index Type* button  until the Title Bar reads **(Page Index)**.
5. Click the *Next Index Entry* button  to move through the statement file one page at a time. Make a note of the page numbers shown in the title bar for this member's statement.
6. To print the statement, click the *Print* button  to display the Print Report dialog box:

Choose **Pages** and enter the range of pages in the box provided.

- For example, if you need to print a two-page statement that begins on page 4511, enter **4511-4512** as the page range.

Make any other changes to the Print dialog box as appropriate, then click OK to print the statement.



If the statement has more than one page, it is recommended that you de-select the *Include form overlay* option. See Page 10 for more information.

7. When done, close the Report Display window, then close the main R/View window and remove the CD.

Viewing and Printing a Report

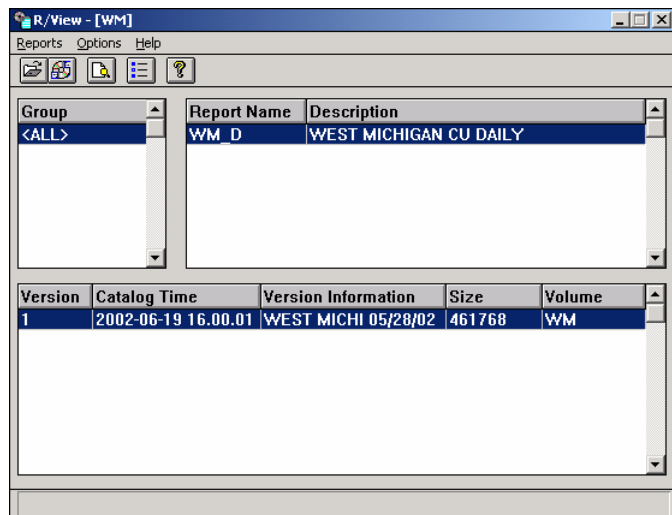
Use these instructions to quickly view a report using R/View. See Page 8 for details on using other R/View features to work with your reports. (Viewing statements is covered starting on Page 4.)

1. Insert the CD into your CD-ROM drive.

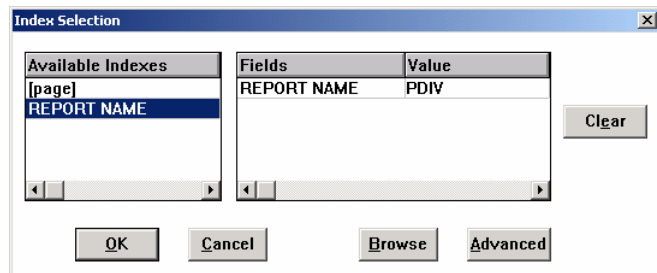
Depending on how your PC is set up, the R/View program may start automatically in a few seconds. If it does not, click the **Start** button, select **Run** and type the following (for the D, substitute the drive letter that represents your CD drive) and click OK:

D:\CDRVIEW\Rview.exe

2. The first dialog box shows the report file(s) contained on the CD. Select a report file by double-clicking one of the items in the list at the bottom.




3. Next, the Index Selection dialog box will appear. From here you may search for any report by name or page number. (See Page 8 for more information on other features available in this dialog box.)



To go directly to a report, select **REPORT NAME** under “Available Indexes,” then enter all or a portion of the report name under “Value” and click OK to search for that report.

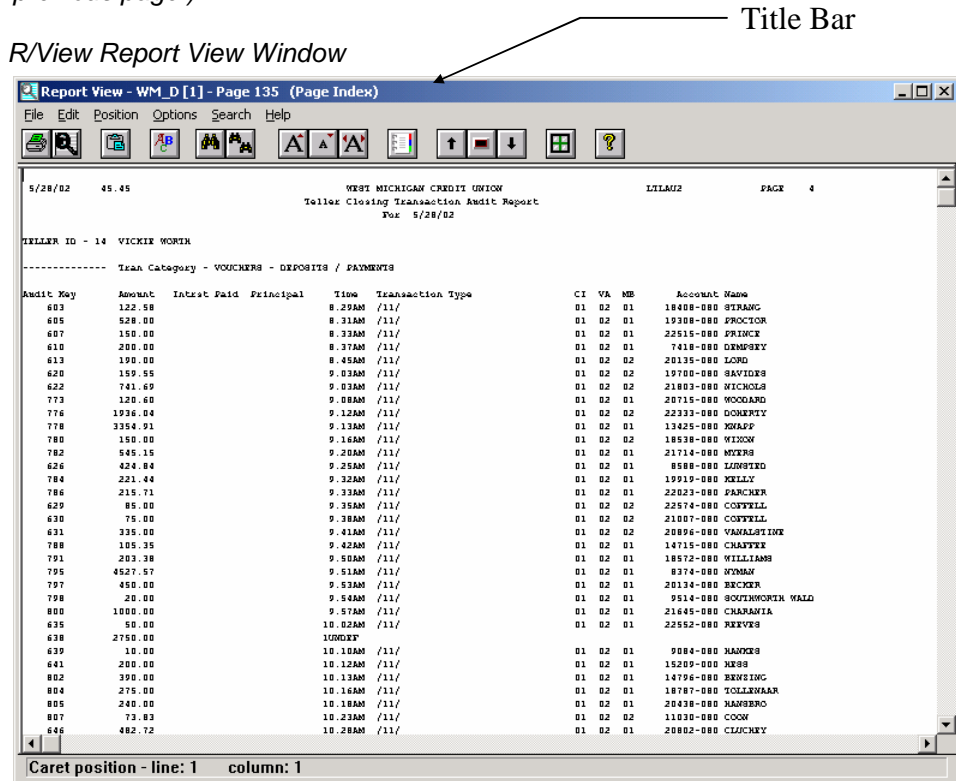
NOTE: The report name is the name that appears in the upper right corner near the page number, such as PDIVMR2 or LGLACT1, etc.




If this is not the right report, click the *Next Index Entry*  button until the correct statement is displayed before proceeding to the next step.

The first page of the report will be displayed on the Report View screen (shown below). Before printing, you must verify how many pages are actually in this report.

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- Click the *Select Index Type* button  until the Title Bar reads **(Page Index)**.
- Click the *Next Index Entry* button  to move through the report file one page at a time. Make a note of the page numbers shown in the title bar for this report.
- To print the report, click the *Print* button  to display the Print Report dialog box:

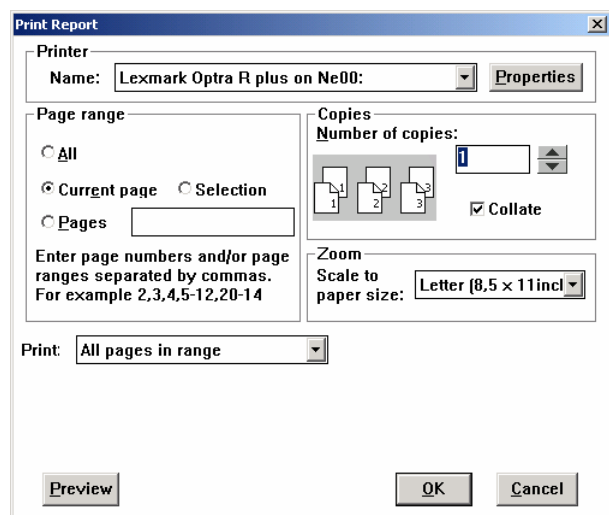
Choose **C**urrent page to print only the page currently displayed.

OR

Choose **P**ages and enter the range of pages in the box provided.

- For example, if you need to print a two-page report that begins on page 4511, enter **4511-4512** as the page range.

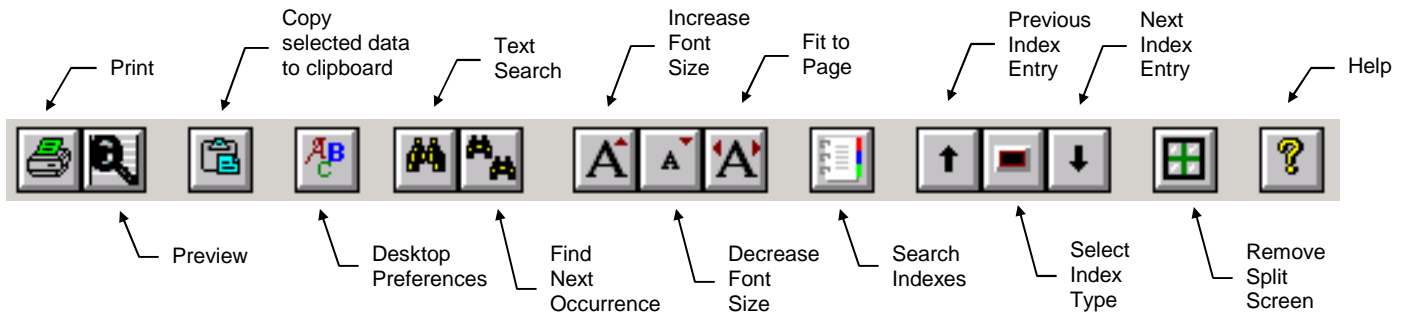
Make any other changes to the Print dialog box as appropriate, then click OK to print the report.







- When done, close the Report Display window, then close the main R/View window and remove the CD.

Using Other R/View Features


The R/View Toolbar



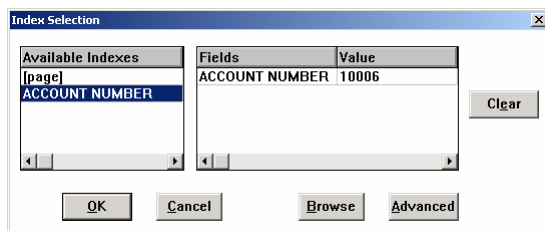
Changing the Display

- To change the font used to display and print the document, click the *Desktop Preferences* button  and choose the desired font.
 - ✎ IMPORTANT: For best printing results, use a True Type or Open Type font (with the **Tt** or **O** symbol in front of the font name). This font type is also needed if you wish to use the *Fit to Page* feature.
- To change the text size, click the *Increase Font Size* or *Decrease Font Size* buttons  . This is helpful if you wish to view more of the document on the screen, or need to make the document fit better on the printed page.
- To view the entire page on the screen, click the *Fit to Page* button .
 - ✎ IMPORTANT: This feature will work only for True Type or Open Type fonts (with the **Tt** or **O** symbol in front of the font name).

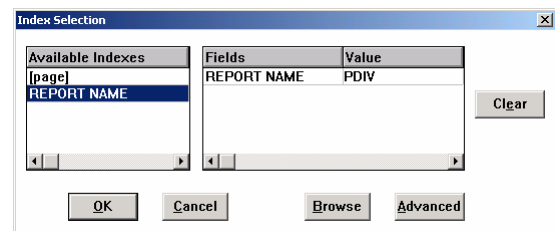
Using Search Indexes

The Search Index window can be displayed at any time by clicking the *Search Indexes* button , and will appear automatically when you first access your R/View CD. This window is used to specify how the document should be displayed and to locate a specific statement or report quickly.

For statements:



For reports:



Statement Search Tips

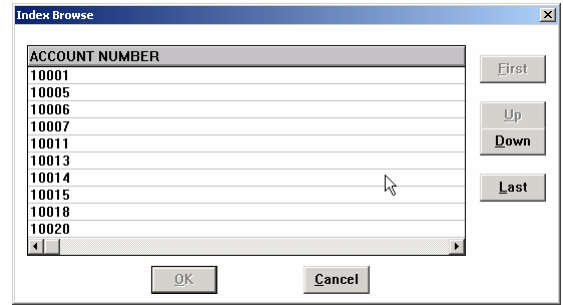
- To search for a specific account, select **ACCOUNT NUMBER** under “Available Indexes,” then enter the account number under “Value.” Click OK to search for that statement.
 - ⇒ You DO NOT need to enter leading spaces or zeros. For account number 1273, simply type 1273 in the “Value” field.

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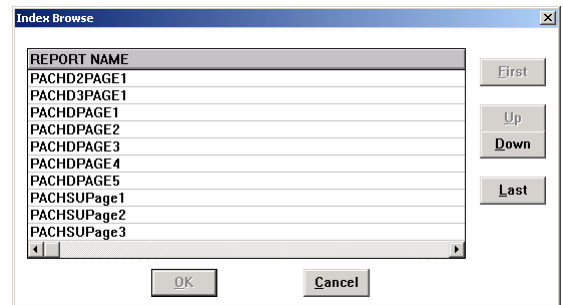
⇒ The search will look for any account numbers that start with the digits you entered. Therefore, if you enter 1273, R/View will go to account number 1273, then 12731, then 1273123, etc., as you click the *Next* button in the report display (see below for more information on the behavior of these buttons).

- To look at the entire statement file, one page at a time, select **[page]** under “Available Indexes” and click OK.
- To look at a specific page in the statement file, select **[page]** under “Available Indexes,” enter the desired page number under “Value” then click OK.
- To browse through a list of similar account numbers, select **ACCOUNT NUMBER** under “Available Indexes,” then enter the account number under “Value.” Click **Browse**. A list will appear showing all account numbers that start with those digits. Simply double-click on the account number you want. (Use the “Down” button to scroll through the list.)



Report Search Tips



- To search for a specific report, select **REPORT NAME** under “Available Indexes,” then enter the report name under “Value.” Click OK to search for the first occurrence of that report on the CD.
 - ⇒ The report name is the name that appears in the upper right corner near the page number, such as PDIVMR2 or LGLACT1, etc.
 - ⇒ The search will look for any reports that start with the text you entered. Therefore, if you enter PDIV, R/View will go to report PDIVMR1, then PDIVMR2, etc., as you click the *Next* button in the report display (see Page 10 for more information on the behavior of these buttons).
- To look at the entire report file, one page at a time, select **[page]** under “Available Indexes” and click OK.
- To look at a specific page in the report file, select **[page]** under “Available Indexes,” enter the desired page number under “Value” then click OK. (This might be helpful if you’ve already printed a certain page and want to go directly back to that page again.)
- To browse through a list of similar reports, select **REPORT NAME** under “Available Indexes,” then enter the report name under “Value.” Click **Browse**. A list will appear showing all reports that start with those characters. Simply double-click on the report you want. (Use the “Down” button to scroll through the list.)





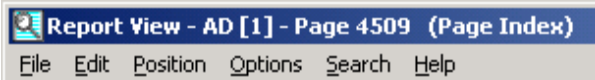
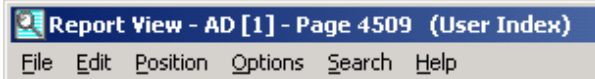
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Scrolling Through the Statement or Report File

The behavior of the *Previous Index Entry*  and *Next Index Entry*  buttons and the **PageUp** and **PageDown** keys on the keyboard will depend on the **Index Type** currently in use.

There are three different index types. Click the *Select Index Type* button  to switch between types (notice the indicator in the Title Bar showing the current index type).

- **User Index Query** - In this mode, the Previous and Next buttons will move to the first page of the previous or next statement/report that matches the value you entered. This mode is used automatically when you have entered an account number or report name in the Index Selection window, or when you use the Browse feature.

- **Page Index** - In this mode, the Previous and Next buttons will move to the previous or next page within the file. This mode is used automatically when you have selected the “[page]” option in the Index Selection window without entering an actual page number.

- **User Index** - In this mode, the Previous and Next buttons will move to the first page of the previous or next statement or report in the file. This type is used automatically when you select the ACCOUNT NUMBER or REPORT NAME option in the Index Selection window without entering an actual account number or report name.


About the Statement Overlay

When viewing member statements, to make the first page of the statement easier to read, you can choose to display it with or without the overlay (boxes).

- To display (or hide) the overlay from the screen, from the **Options** menu, choose **Show form overlay**.
- To include (or omit) the overlay from the printed output, select or deselect the *Include form overlay* flag in the Print dialog box. (NOTE: This feature may not appear for all printer types.)

CU*TIP: Remember that the overlay is designed to fit only on the first page of a statement. If you want to print a multi-page statement using the overlay, print the first page of the statement separately with the *Include form overlay* flag checked, then print subsequent pages with the flag turned off.



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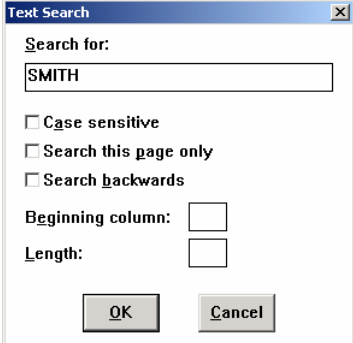
Searching for Text

R/View includes a Text Search feature which lets you look for a specific block of text or numbers within a statement or report page. For example, if you are unsure of an account number, the Text Search feature may be helpful to locate a member's name or Social Security/Tax ID # within the statement file. For reports, you could use this feature to look for a specific dollar amount or G/L account number.

1. Click the *Text Search* button .

 **HINT:** If you wish to search from the top of the file, first click the *Search Indexes*  button, choose [page] and click OK.


2. In the Text Search dialog box, enter the text you wish to find. For example, you could enter a member's last name, or a SSN (be sure to include the dashes). For dollar amounts, include any commas and decimals that appear on the report.




The image shows a 'Text Search' dialog box with the following fields and options:

- Search for: SMITH
- Case sensitive
- Search this page only
- Search backwards
- Beginning column:
- Length:
- Buttons: OK, Cancel

3. Click OK to begin the search. The first occurrence will be highlighted.

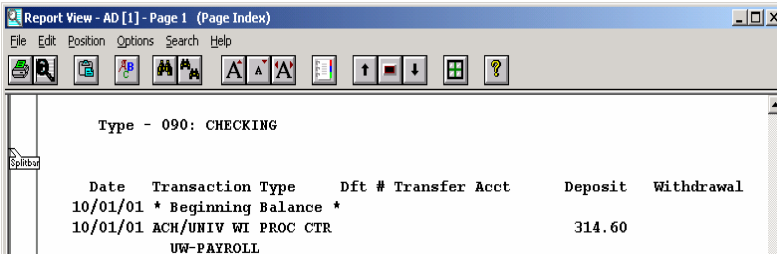
4. To continue searching, click the *Find Next Occurrence*  button. Repeat until the desired item is displayed.

HINT: Click the Help  button for more information about using these and other advanced R/View features. Remember that not all features described in Help will be applicable for your member statements or reports.

Using a Split Screen

If you are viewing a statement or report using a large font, the Splitbar feature can be helpful to keep one side of the screen stationary while scrolling the other side.

1. Point the mouse at the extreme left or top edge of the report view window until the "Splitbar" notation appears.



The image shows a 'Report View - AD [1] - Page 1 (Page Index)' window with a split screen. The left pane shows a table with the following data:


Date	Transaction Type	Dft #	Transfer Acct	Deposit	Withdrawal
10/01/01	* Beginning Balance *				
10/01/01	ACH/UNIV WI PROC CTR			314.60	
	UW-PAYROLL				

2. Drag the Splitbar to the middle of the window and release. Scroll bars will appear for both segments of the screen and can be used independently to view two different parts of the document simultaneously.

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Type - 090: CHECKING						
Date	Transaction Type	Dft	Withdrawal	Balance	** Draft Recon *	Amount
10/01/01	* Beginning Balance *			12,531.39	2021	6,000.0
10/01/01	ACH/UNIV WI PROC CTR			12,845.99	2022	72.0
	UW-PAYROLL				2023	20.0
10/01/01	ACH/EMPLOYEE TRUST FU			18,391.56	2024	144.0
	ANNUITIES				2025	200.0
10/01/01	CHECK 021436005	20	6,000.00	12,391.56	2026	610.0
10/02/01	CHECKING DEPOSIT			12,591.56	2027	2,439.6
10/02/01	CHECK 023106998	20	2,000.00	10,591.56	2030*	.8
10/02/01	CHECK 021726358	20	610.00	9,981.56	2031	2,000.0
10/02/01	CHECK 027873210	20	20.00	9,961.56	2032	34.3
10/05/01	CHECK 021062704	20	72.00	9,889.56	2033	10.9
10/09/01	CHECK 021461956	20	10.99	9,878.57	2034	7.4
10/09/01	CHECK 021496879	20	.86	9,877.71	2036*	25.0
10/11/01	CHECK 021125018	20	2,439.69	7,438.02	2037	14.4
10/11/01	CHECK 021082386	20	144.00	7,294.02	2038	153.2
10/12/01	CHECK 021525343	20	200.00	7,094.02	2039	42.1
10/15/01	CHECKING DEPOSIT			8,094.02	2042*	610.0
10/15/01	CHECK 021104123	20	34.33	8,059.69		
10/15/01	CHECK 021049745	20	25.00	8,034.69		
10/15/01	CHECK 021171610	20	7.40	8,027.29		
10/23/01	CHECK 021822608	20	153.22	7,874.07		

3. To remove the split, click the *Reset Split Screen*  button.