ArchView

Viewing Reports, Statements, Tax Forms and Images on CD/DVD

INTRODUCTION

CU*Answers, in collaboration with eDOC Innovations, is pleased to present ArchView, our own custom-designed software for viewing archived reports, statements, and other archived items on CD/DVD. ArchView offers even faster turnaround, greater security and flexibility for future expansion, and an easy-to-learn user interface.

This booklet describes how to use ArchView to view reports, member statements, tax forms, and images (such as receipts and photo IDs) that have been archived on CD/DVD.

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SYSTEM REQUIREMENTS AND INSTALLATION

HARDWARE REQUIREMENTS

These specifications represent the minimum configuration for retrieving documents from an ArchView archive CD/DVD.

- PC running Microsoft Windows XP or above
- Microsoft .NET 4.0 Framework (see below for installation instructions)
- 512 Mb RAM
- CD/DVD drive
- Because of the time required to search through files, faster CPU speed will result in more efficient retrieval time.
- In order to view statements, Adobe Acrobat Reader must be installed.

INSTALLATION

Each ArchView CD/DVD contains the viewer software needed to view and print reports and statements. ArchView does require that your PC be running Microsoft .NET 4.0 Framework. If your PC does not already have this software (or you do not know if it does), it is easy to install. Simply go to www.microsoft.com and search for .NET Framework. You will need to install at minimum the 4.0 version.

If you do not have a high-speed Internet connection, contact Media Operations (800-327-3478 ext. 132, or mediaoperations@cuanswers.com) for information on how to obtain these files for free.

Once the .NET upgrade is complete, you may proceed to open your first ArchView data CD.

BACKING UP YOUR ARCHIVE DATA

It is essential that you determine a disaster recovery plan in case your CD/DVD is damaged or destroyed. Extra copies of each quarter's CD/DVD can be ordered in advance but cannot be produced as a standalone CD/DVD after the initial CD/DVD burn.

Therefore, we recommend you either copy the contents of the CD/DVD to a secure backup location, burn a copy to another CD/DVD (if you have a CD/DVD burner), or purchase at least two copies of the CD/DVD each quarter. Contact Media Operations for details.

PASSWORD PROTECTION FOR YOUR CDS

To protect your valuable member data as it is in transit from eDOC Innovations to your credit union, and to allow you to control who on your staff can view archived items, each CD/DVD you receive will be password protected.

A letter will be mailed separately to your credit union CEO explaining what the password will be. The same password is used for all CD/DVDs produced while that password is in effect.

The passwords will be changed on a yearly basis by CU*Archives. You will be informed of the new password before your credit union receives them. Passwords are randomly generated and meet strong password criteria: 8 characters in length, consisting of at least one uppercase letter, lowercase letter, and numeric digit.

Remember: Passwords should never be posted in a visible location or stored with the CDs. Just remember to keep good records of which CDs go with each year's password so that you can view CDs from previous years.

GETTING STARTED

OPENING ARCHVIEW

1. Insert the CD/DVD into the CD/DVD drive on your computer. If your CD/DVD drive has the auto-run option turned on, the software will launch automatically.

   > *If auto-run is turned off, click Start, then Run, then use the Browse button to select the file named **ArchiveViewer.exe** on the CD/DVD drive (usually D:\ArchiveViewer.exe). Click OK to launch the program.*

2. The entry screen will appear, along with the login box. The entry screen for reports is shown below:

   The Entry Screen
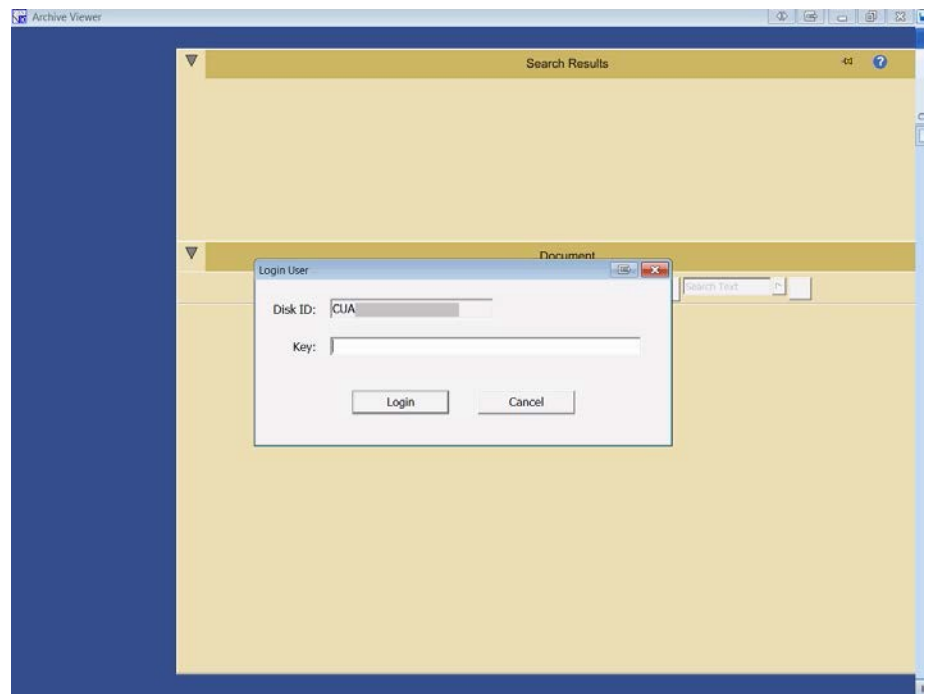
3. Please type in the password provided to your credit union. (See Page 2 for more information about this password.)
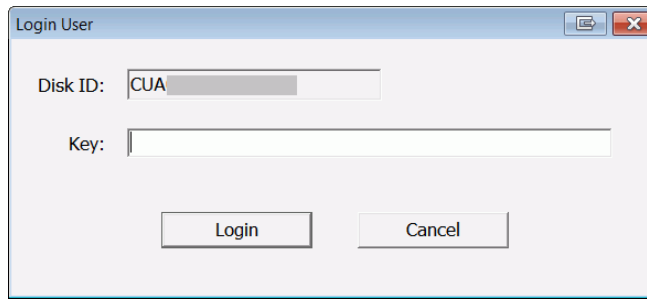
4. Click OK and the main Search screen will appear (shown below). Depending on your CD/DVD, different search criteria will appear on the screen.

PERFORMING A SEARCH

Use the following method to search for any type of archived item, including reports, statements, or images (such as receipts).

1. Enter your search criteria in the fields provided.

   - Search fields vary and are determined by the way the item is indexed. For that reason, for example, receipts have different search fields than reports.

**Main Search Screen (Search Fields Will Vary)**
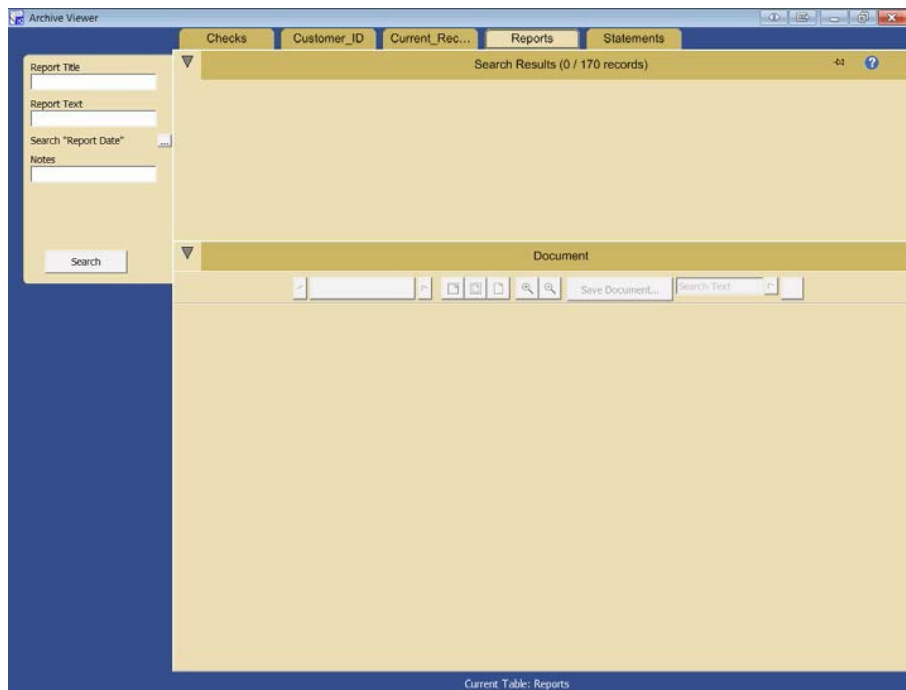
Search Tips

- Items that can be searched for include indexed items, such as short report names, account numbers, member names, and any word in a report description. For example, for reports, when searching on "Title," enter the short report name or any word in the title.
- Search terms are not case sensitive.
- Boolean characters such as "AND" are not supported within a Search item. However, when searching for an item, you can use multiple search fields such as both the report name and date fields.
- For reports only: Use the Text field to search for text within the body of the report.
- Leave the search fields blank to view all items of that type that appear on the CD, with the exception of statements. You cannot view all statements at one time; instead, enter a specific account number to view only that member's statement.
- See Page 8 for a discussion on date-range searches.

2. Once you have selected your search criteria, click the Search button.

3. Search results will appear at the top of the screen in the **Search Results** section. The number of items found will appear at the top of this listing.

Search Results Shown
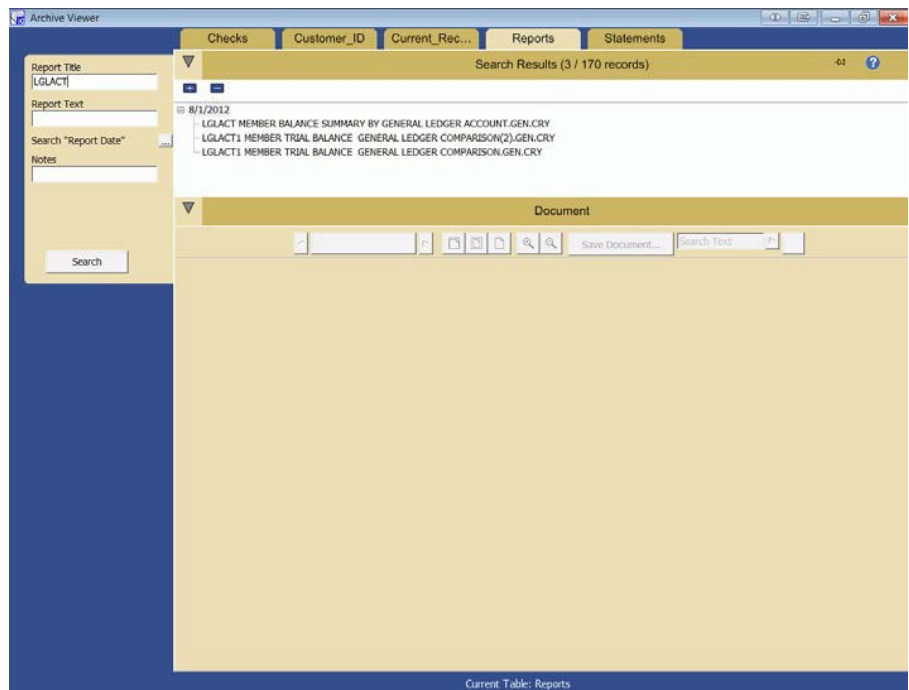
4. Double click an item on the list and the item (such as a report or receipt) will appear in the **Document** section at the bottom of the screen.

- NOTE: The navigation bar at the top of the Document area varies according to the type of image.
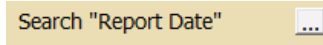
Document Selected
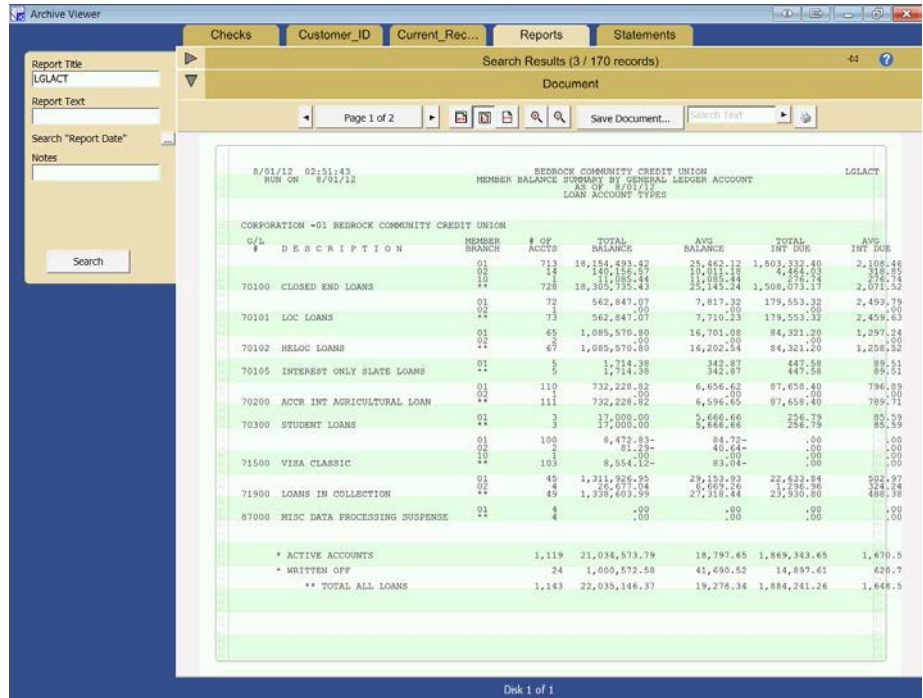
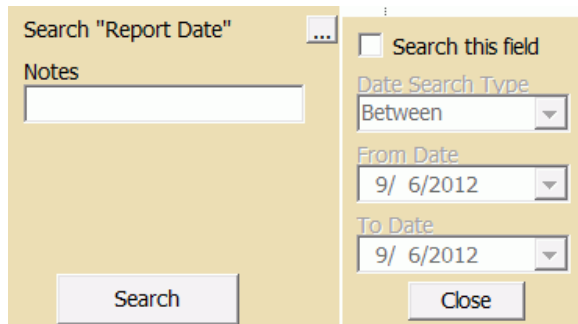*To return to the report listing to select a different report, click "Search Results."*

PERFORMING A SEARCH ON A DATE OR DATE RANGE

The following directions cover searching using a date or date range field.

1. In order to search for a date or date range, click the ellipsis button next to a date field to view a pop-up selection box.


2. The date search fields will appear.

3. Check the box that reads, "Search this field."

    - **Important: You must check this box for the date search to be used.** Once this box is checked, the date fields will become active and allow the selection of dates.

4. Select a Date Search Type. These include Between, On, Before, and After.

5. Enter your date range.

6. Click Close.

7. When you return, this field will now have an X next to it to indicate that a date has been selected.
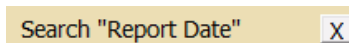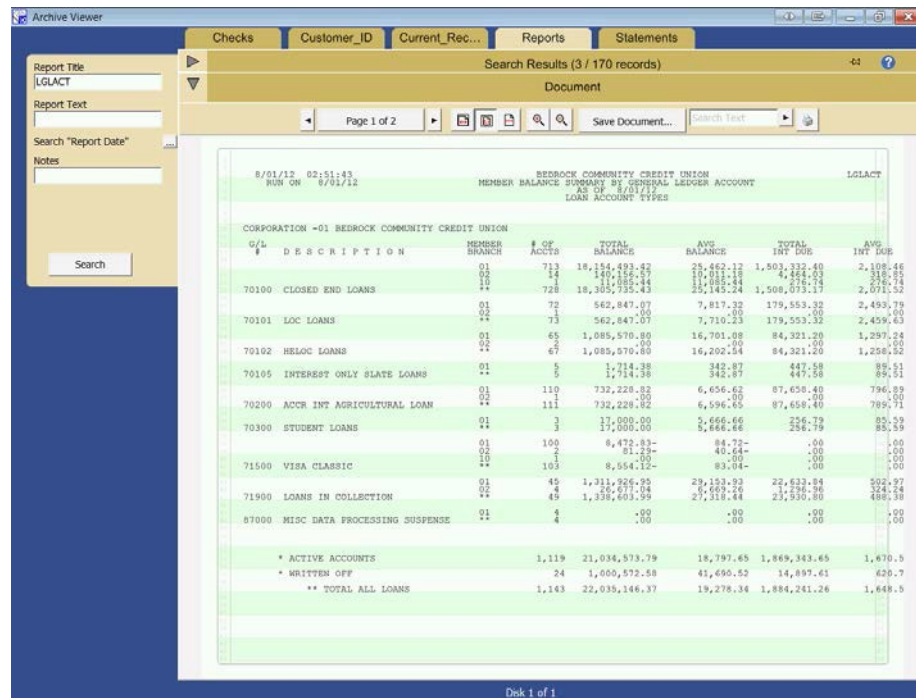

8. If you later return and uncheck "Search this date," the date range will no longer be used for the search and the ellipsis will reappear next to the date field.
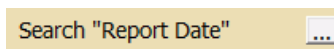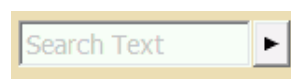
REPORTS

The Report Viewer Screen (Reports)

The bar at the top of the Document section allows you to perform a search within the report and change the page of the report you are viewing. It allows you to save and print the selected report.


SEARCHING FOR TEXT IN A REPORT

To locate a specific word, phrase, or number on any page of the report, enter the text (or number) in the "Search text" box. Then click the arrow next to the box. This will search for the text only within the report you are viewing.


All instances of the text will appear highlighted in the report.

NOTE: To search for text or a number in all reports on the CD, use the Report Text field.
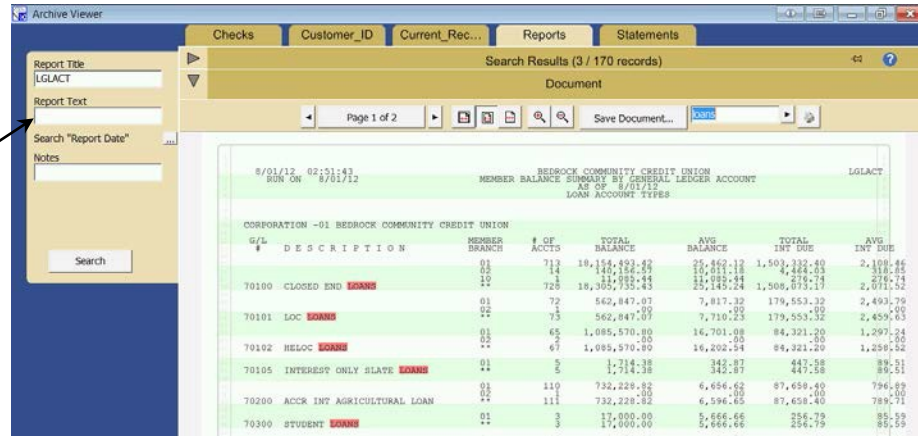
VIEWING A REPORT

Use the forward and backward arrows to scroll through pages of the report. If you plan on printing a copy of the report, note the page number that appears between these buttons so that you may print only the pages you need.
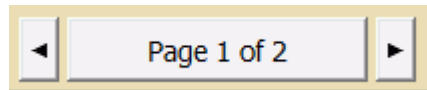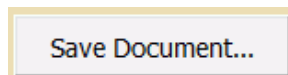

To magnify the view, use the plus and minus magnifying-glass buttons.

SAVING A REPORT

To save a report to your C:\ drive, use the "Save Document" button.
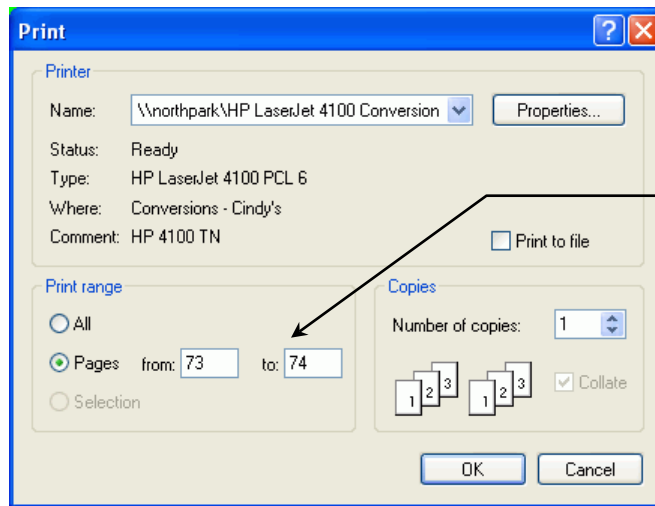

You can then navigate to the location on your computer or network where you want to save the report.

PRINTING A REPORT

After locating the report page(s) you wish to print, click the print button (shown below).

The standard Print screen will appear, allowing you to print the report.

BE CAREFUL: If you do not specify a range of pages, the entire report will be printed.

MEMBER STATEMENTS

You must enter an account number to view a member's statement.

1. Enter an account number in the Account field.

2. Click Search to view a listing of statements for that account.

3. Select a date in the Search Results area to view the statement below in the Document area.

The Report Viewer (Statement)
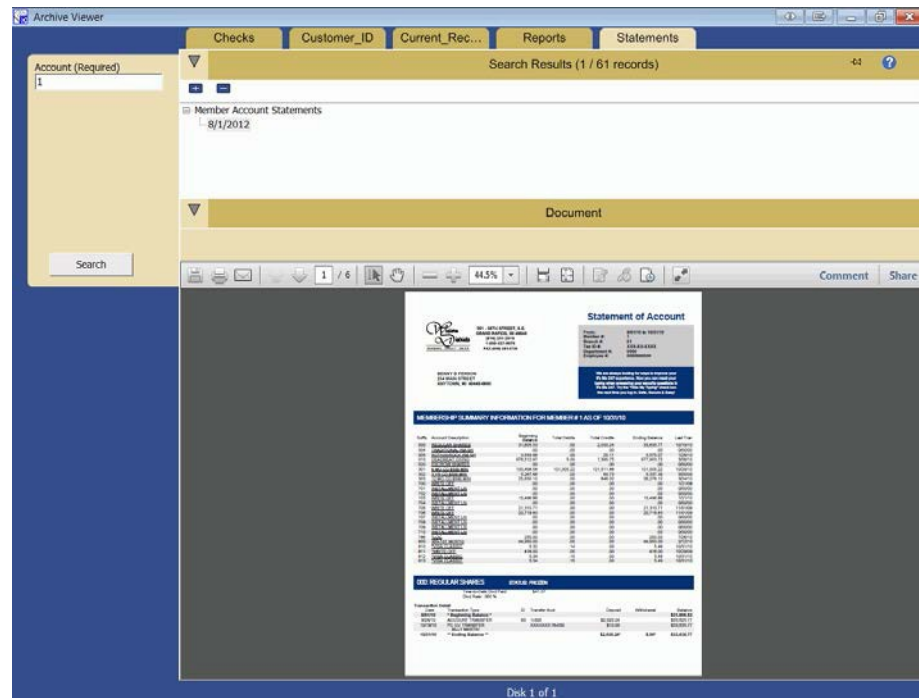
VIEWING STATEMENTS

The statement view includes the standard Adobe toolbar. For this reason, you must have Adobe Acrobat Reader installed on your computer to view statements.


Click the page-down arrow to view additional pages in the statement. The plus and minus buttons magnify and shrink the view.

PRINTING STATEMENT PAGES

After locating the statement page(s) you wish to print, click the button with a printer icon to print individual pages of the statement file.

Print Report Screen

BE CAREFUL: If you do not specify a range of pages, the <u>entire</u> statement will be printed!
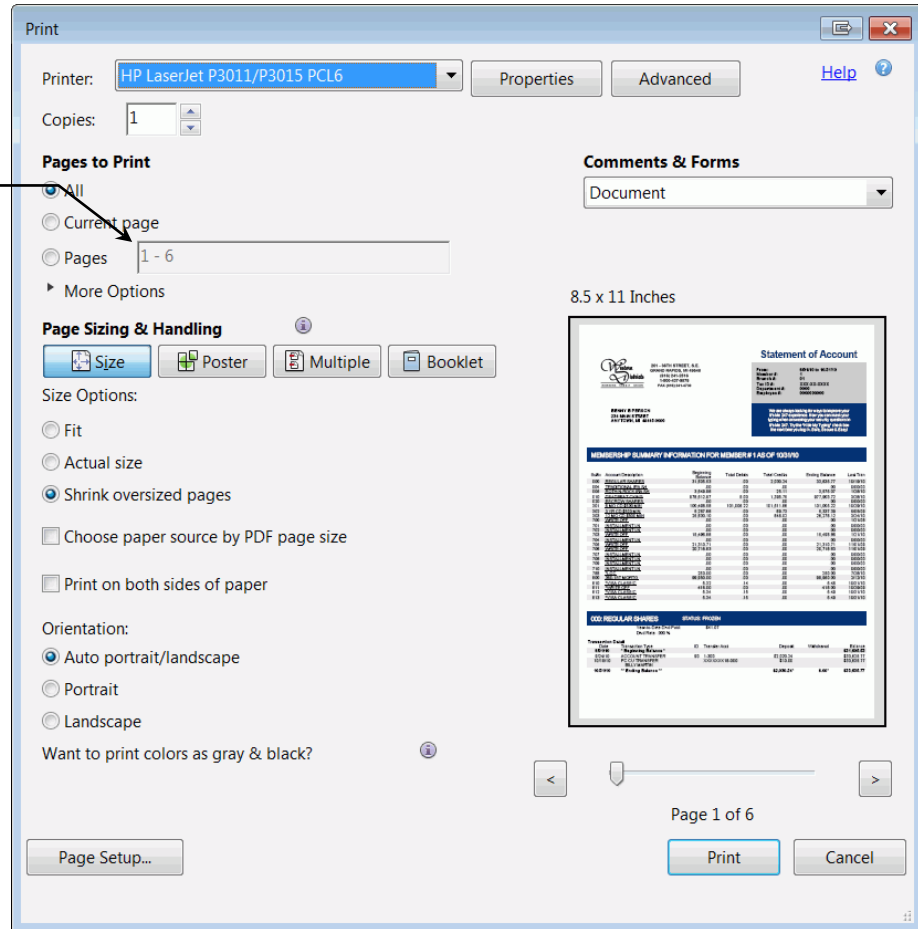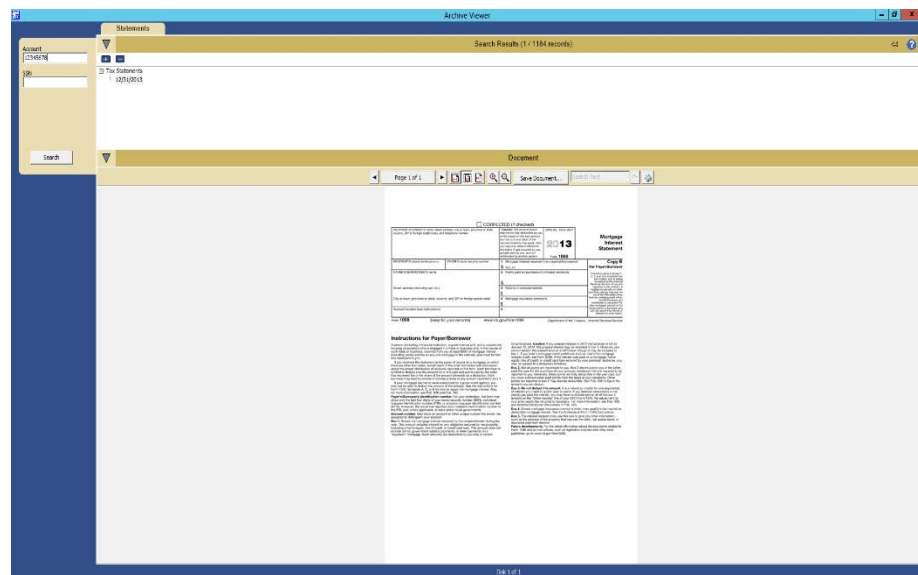
Tax Forms

You must enter an account number or social security number to view a tax form.

1. Enter an account number in the Account field or a social security number in the SSN field.
   - Don't include hyphens or spaces when entering social security or account numbers.
   - Note: 1098 tax form account numbers include the suffix of the account.

2. Click Search to view a listing of tax forms for that account or SSN.

3. Select a date in the Search Results area to view the tax form below in the Document area.

The Report Viewer (Tax Forms)

VIEWING Tax Forms

The tax forms view includes the standard Adobe toolbar. For this reason, you must have Adobe Acrobat Reader installed on your computer to view statements.
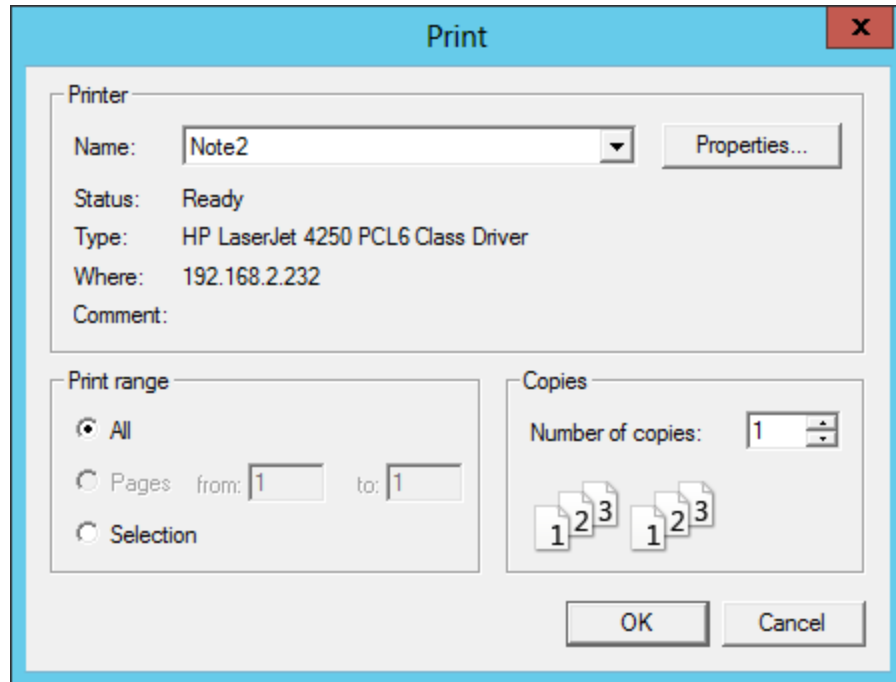

Click the page-down arrow to view additional pages in the statement. The plus and minus buttons magnify and shrink the view.
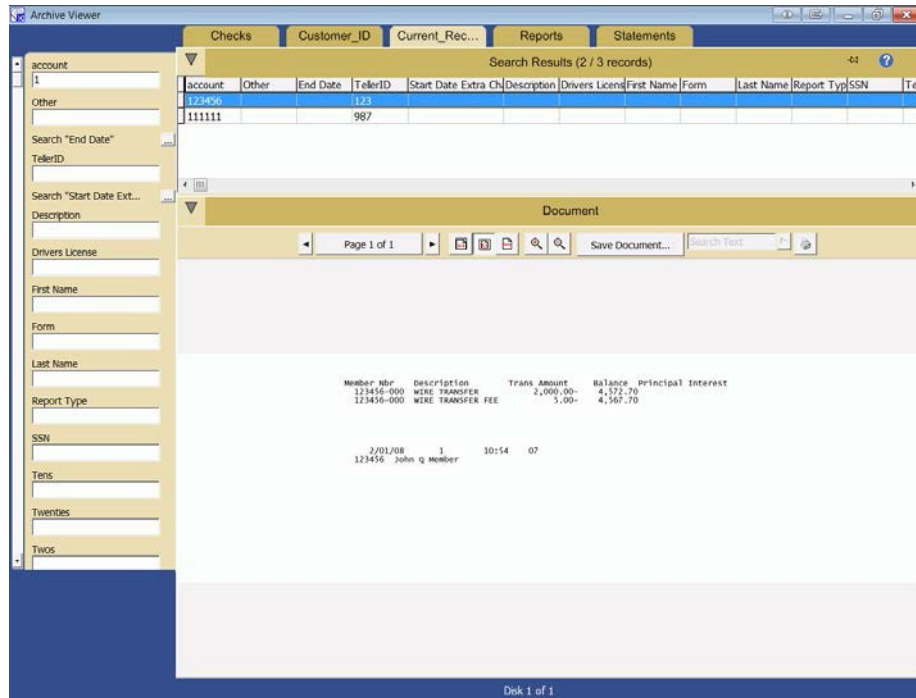
PRINTING Tax Forms

After locating the tax forms page(s) you wish to print, click the button with a printer icon to print individual pages of the tax forms.

Print Report Screen

IMAGES (PHOTO IDS AND RECEIPTS)

Images such as photo IDs and receipts use the same search features and toolbar as reports.

Refer to the Reports section on Page 9 for more details on searching for, viewing, saving, and printing images.