

VMEDIA 101

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vMedia

 **The Mastermind Series**

Presented by  **VERTICAN**
TECHNOLOGIES

Overview of Today's MMS

- Setup, installation and VLM
- Scanning documents to vMedia
 - How to save documents to vMedia
 - Modifying unsaved scan sets
- Viewing stored electronic media
 - Searching, sorting and viewing
 - Printing, editing and exporting
- Send to vMedia
- Print to vMedia
- Spectrum Importer



Installation

- Download vMedia_Install.exe from the vPortal
 - Login – My Vertican – My Products – vMedia – View License Details
 - <https://vportal.vertican.com/MyVertican/ProdInfo.aspx?p=vMedia>

The screenshot shows the MyVertican web application interface. The top navigation bar includes 'Go To Corporate Site', 'Dashboard', 'vStore', 'Help', 'My Vertican', and 'VT'. The left sidebar contains navigation links for 'My Incidents', 'My Invoices', 'My Products', 'My Services', 'My Agreements', 'My Wallet', and 'My SOWs'. The main content area is titled 'Product Info' and displays detailed information for vMedia. A table shows the product name 'vMedia', start date '7/13/2016 12:00:01 AM', expiration date '7/31/2199 11:59:59 PM', and subscription type 'Monthly - Active'. Below this, a table lists user tiers and their counts: Administrator (20), Power User (10), Scanner (3), Standard (9), Viewer (10), and Remote Client (1). The total number of units is 53. Under the 'Software Download' section, there are links for 'Download vMedia' (circled in red), 'Download Software Installation Instructions', 'View Change Log', and 'Download Release Notes'. The file version is 2.9.1.0, size is 199732456 Bytes, and the date created is 10/22/2020. The last version downloaded is 2.9.1.0.

Product	Start Date	Expiration Date	Subscription Type
vMedia	7/13/2016 12:00:01 AM	7/31/2199 11:59:59 PM	Monthly - Active

Tier Name:	Number of Units:	
Administrator	20	Add Users
Power User	10	
Scanner	3	Extend Subscription Length
Standard	9	
Viewer	10	Cancel Subscription
Remote Client	1	
Total:	53	

Software Download:

Download vMedia
File version: 2.9.1.0 Size: 199732456 Bytes Date created: 10/22/2020

Download Software Installation Instructions

View Change Log

Download Release Notes

Last Version Downloaded: 2.9.1.0

Installation

Run the installer from the downloaded location to install the Server component of vMedia.

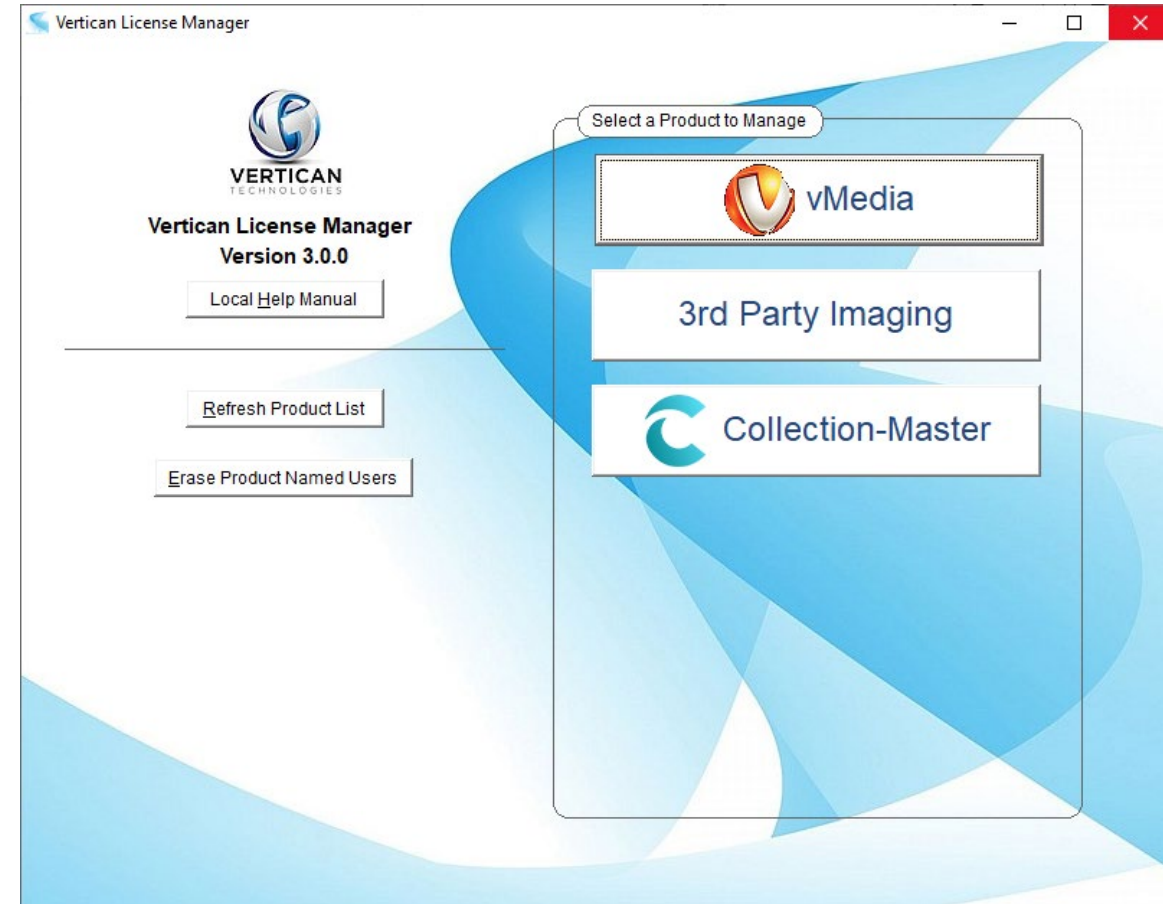
- The main vMedia installation must be installed in a location accessible to all workstation machines.

Run Workstation_Setup.exe on each workstation machine

- Workstation_Setup.exe is contained in the folder where you installed the Server component of vMedia.

Vertican License Manager

- Run LicenseManager.exe (Vertican License Manager)
 - LicenseManager.exe is contained in the folder where you installed the Server component of vMedia



Vertican License Manager

- Assign Tier Levels to users via their Windows username
 - Select the vMedia button in the Licensing Manager
 - Enter your vPortal login information
 - Add or Manage users that can access vMedia and set their tier level

Vertican License Manager

File Edit Help

Registration Information

Company Name: **x-Image-Master Development** Company ID: **5448387488**

Product Name: **vMedia SQL Edition** Last Successful Communication with the License Server: **04/12/2022 02:06:40 PM**

Licenses Expire: **08/31/2199**

Path: **\\WT-Drives01.vertican.com\Drive_FUMASTER**

Left-click header to sort column Help Right-click header to filter records

Tag	Status	User Name	Full Name	Current Tier	New Tier
<input type="checkbox"/>	Active	/REMOTE_CLIENT		REMOTE_CLIENT	
<input type="checkbox"/>	Active	jon.walker		ADMINISTRATOR	
<input type="checkbox"/>	Active	Hugo.Alvarez		ADMINISTRATOR	
<input type="checkbox"/>	Active	bcavallaro		ADMINISTRATOR	
<input type="checkbox"/>	Active	Susan.greene		POWER_USER	
<input type="checkbox"/>	Active	Irasely.Oquendo		ADMINISTRATOR	
<input type="checkbox"/>	Active	joe		POWER_USER	
<input type="checkbox"/>	Active	renee.waddell		ADMINISTRATOR	

Tag All UnTag All Add New User Selected User Options

Tier	Total	Assigned	Available
VIEWER	10	1	9
STANDARD	9	0	9
SCANNER	3	0	3
POWER_USER	10	3	7
ADMINISTRATOR	20	9	11
REMOTE_CLIENT	1	1	0

Tagged User Group Control

Assign to Tier Change Status Delete

Save Exit

Setup



vMedia comes pre-installed with a Collection-Master Paperless database



You can set up any number of databases with full control over the structure of each database



vMedia supports FoxPro as well as SQL Server databases

FoxPro .dbf files require no additional setup but SQL Server databases enable additional features in vMedia

DB Config

- You can create your own database
 - Prefix
 - Database Description
 - SQL Server Info or DBF info

Create new vMedia Database

vMedia Database Prefix (1-6 characters):


Database Description:


SQL Server


Server or Instance Name:

Database Container Name:

Full Path to:

Index DBF: F:\MASTER\ 

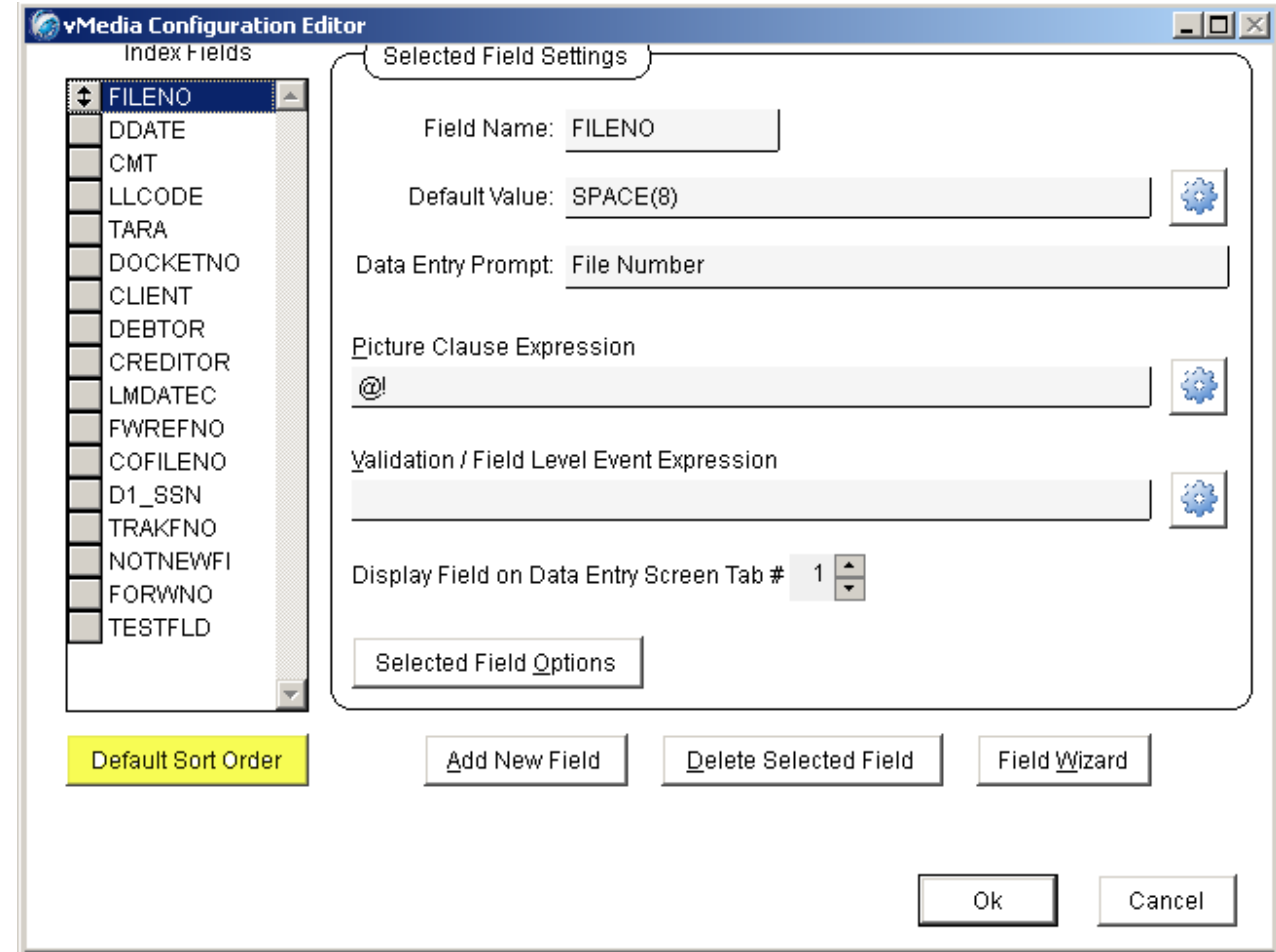
Images: 

Permanent Media: 

Ok Cancel

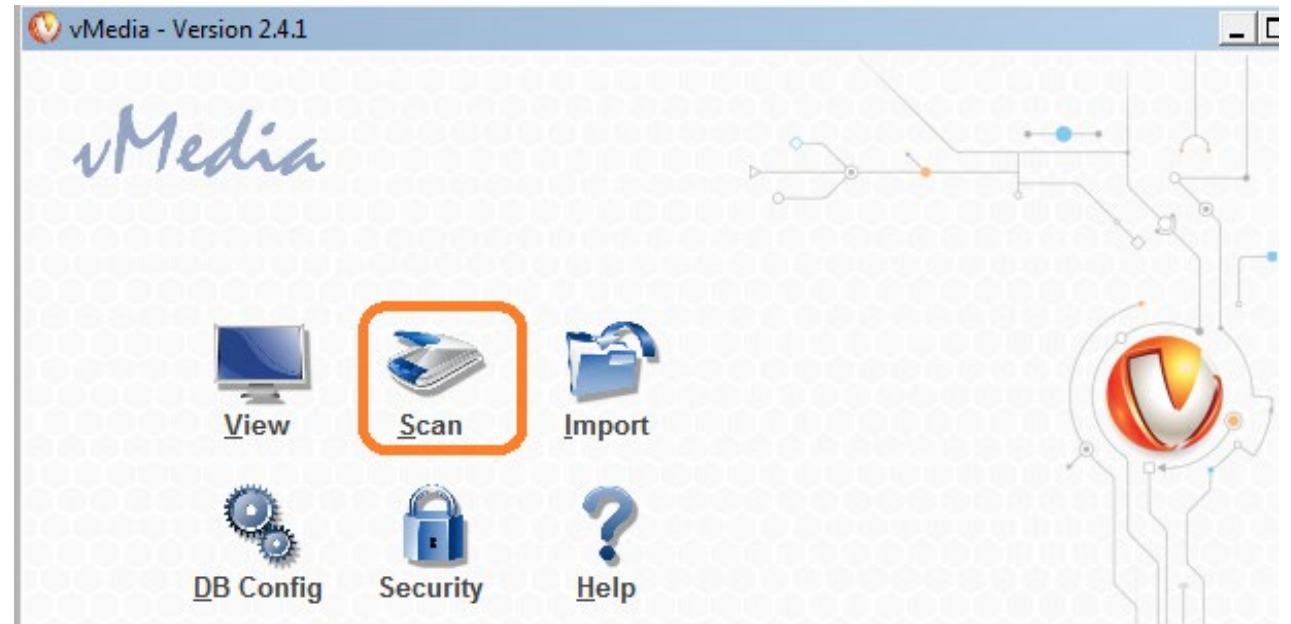
DB Config

- You can define the fields in your database
 - Field Name
 - Default Value
 - Data Entry Prompt



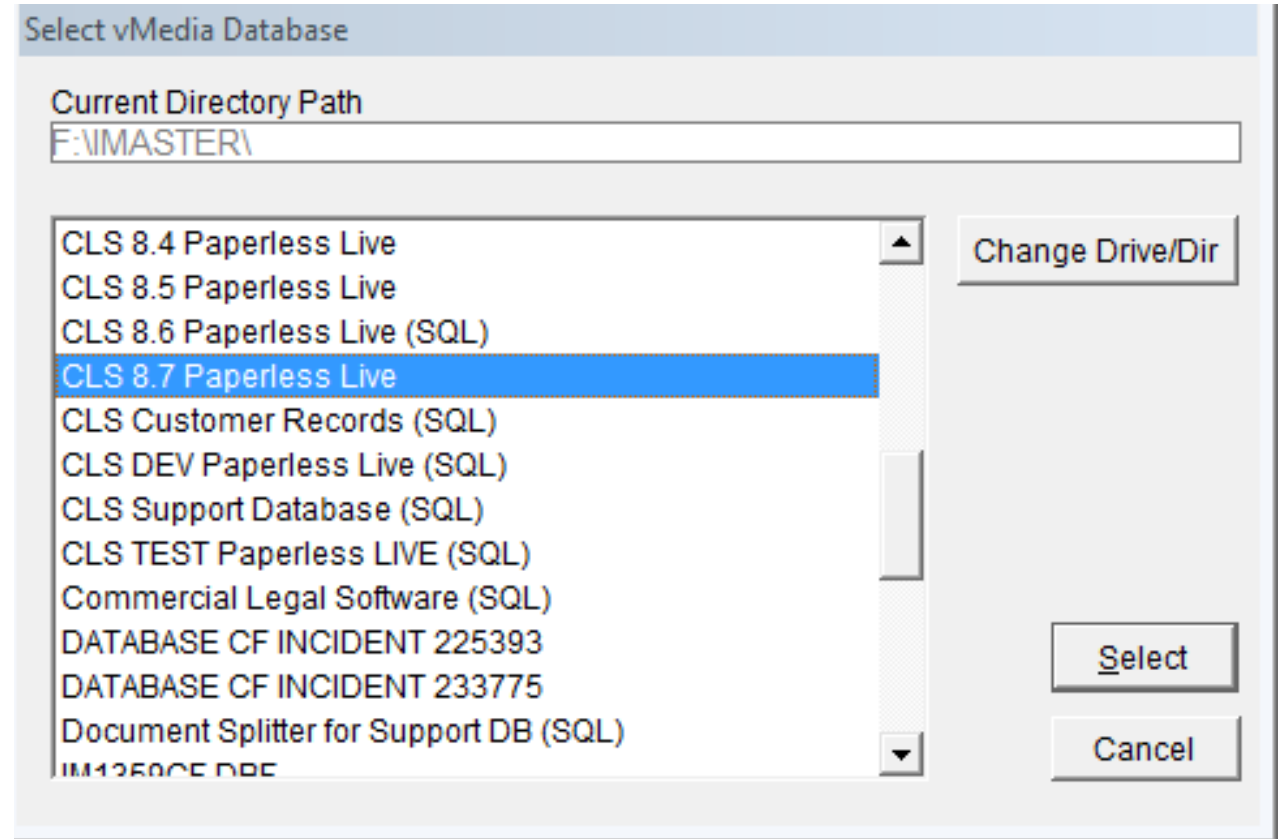
Scanning To vMedia

- Login to vMedia. Select the **Scan** icon.



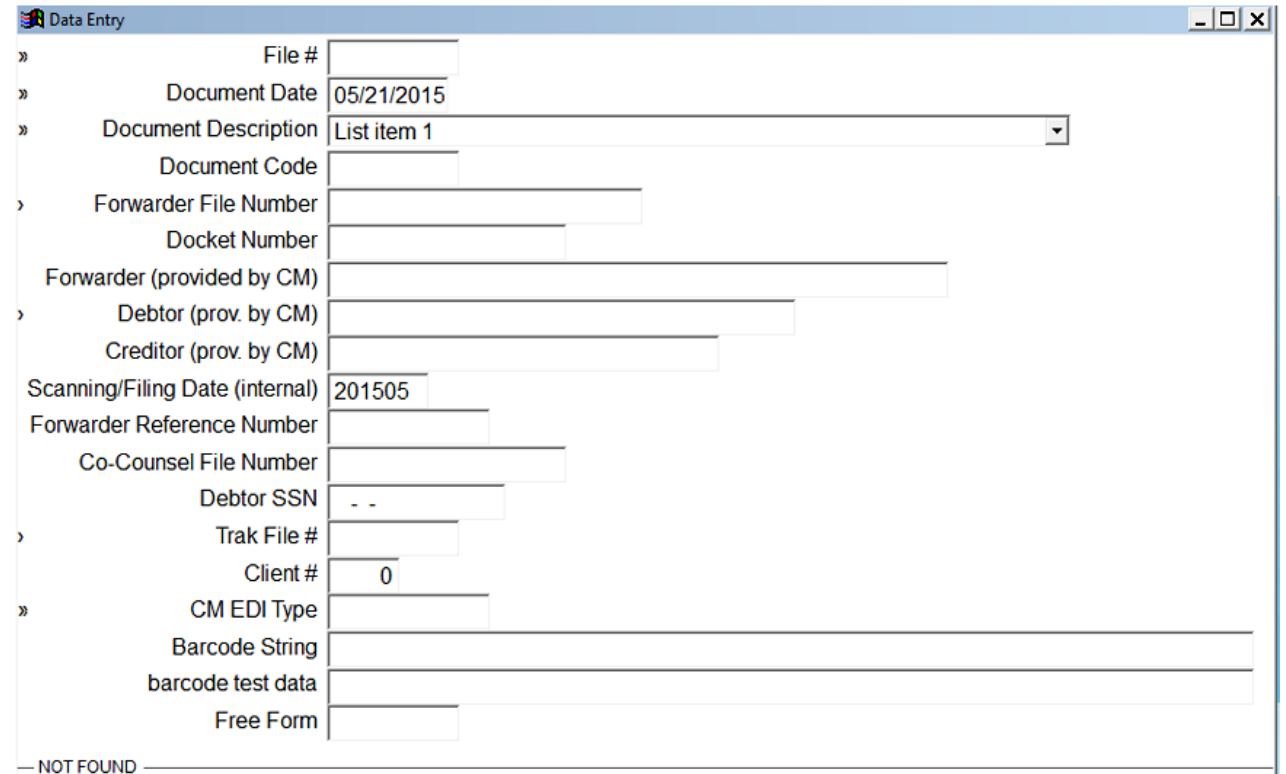
Scanning To vMedia

- Select the desired vMedia database.



Scanning To vMedia

- The vMedia *Scanning Module* main window opens.
- Index fields can be entered pre or post scanning.
- Scan sets can be modified prior to filing.



The screenshot shows a window titled "Data Entry" with the following fields and values:

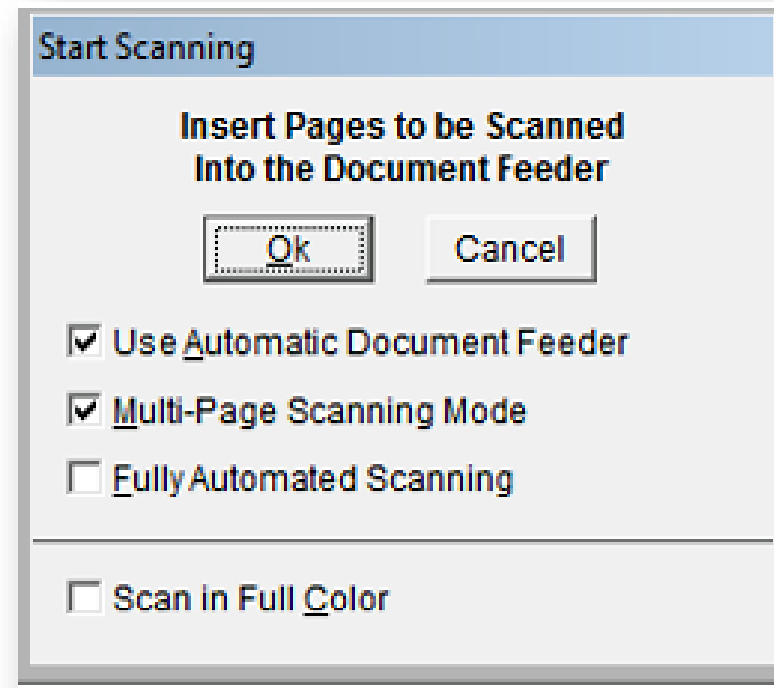
File #	
Document Date	05/21/2015
Document Description	List item 1
Document Code	
Forwarder File Number	
Docket Number	
Forwarder (provided by CM)	
Debtor (prov. by CM)	
Creditor (prov. by CM)	
Scanning/Filing Date (internal)	201505
Forwarder Reference Number	
Co-Counsel File Number	
Debtor SSN	- -
Trak File #	
Client #	0
CM EDI Type	
Barcode String	
barcode test data	
Free Form	

NOT FOUND

Scanning To vMedia

- The Start Scanning dialog box opens.
 - Select one or all options:
 - Automatic Document Feeder (ADF)
 - Multi-Page Scanning Mode
 - Fully Automated Scanning

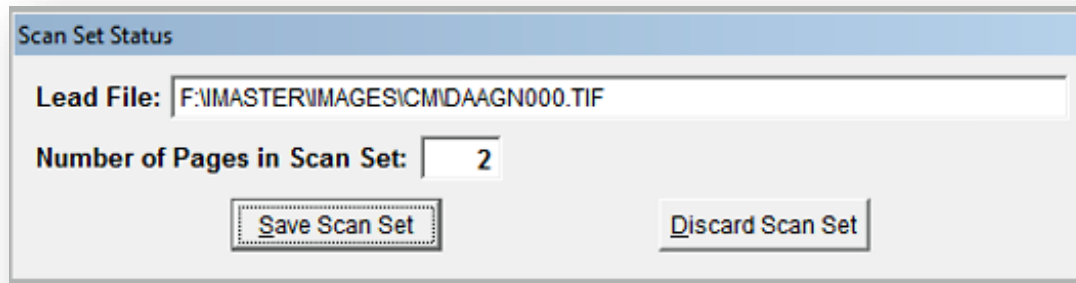
Reference your scanner manufacturer manual for recommended page amount per scan set



Multi/Single Page Scanning Mode

Multi-page Scanning Mode:

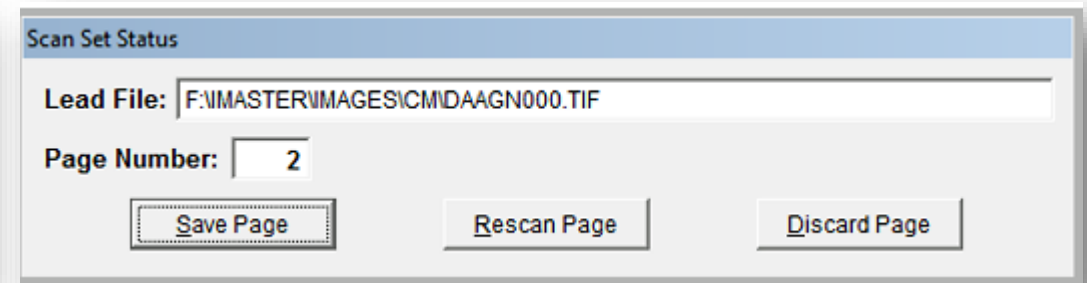
Single-page Scanning Mode:



Scan Set Status

Lead File: F:\MASTER\IMAGES\ICM\DAAGN000.TIF

Number of Pages in Scan Set:



Scan Set Status

Lead File: F:\MASTER\IMAGES\ICM\DAAGN000.TIF

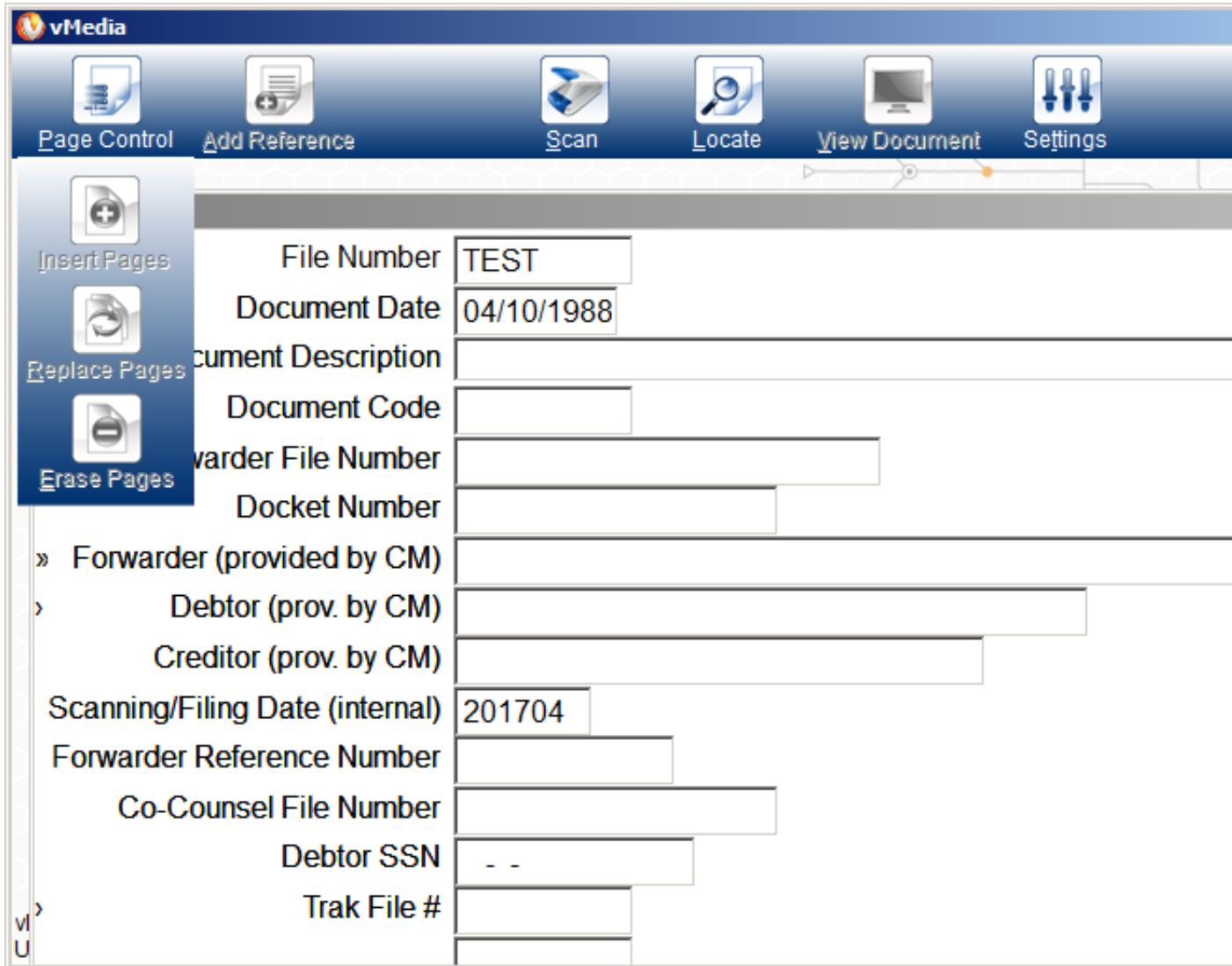
Page Number:

Scan Set Stats include
the batch number.

Modifying Scan Sets

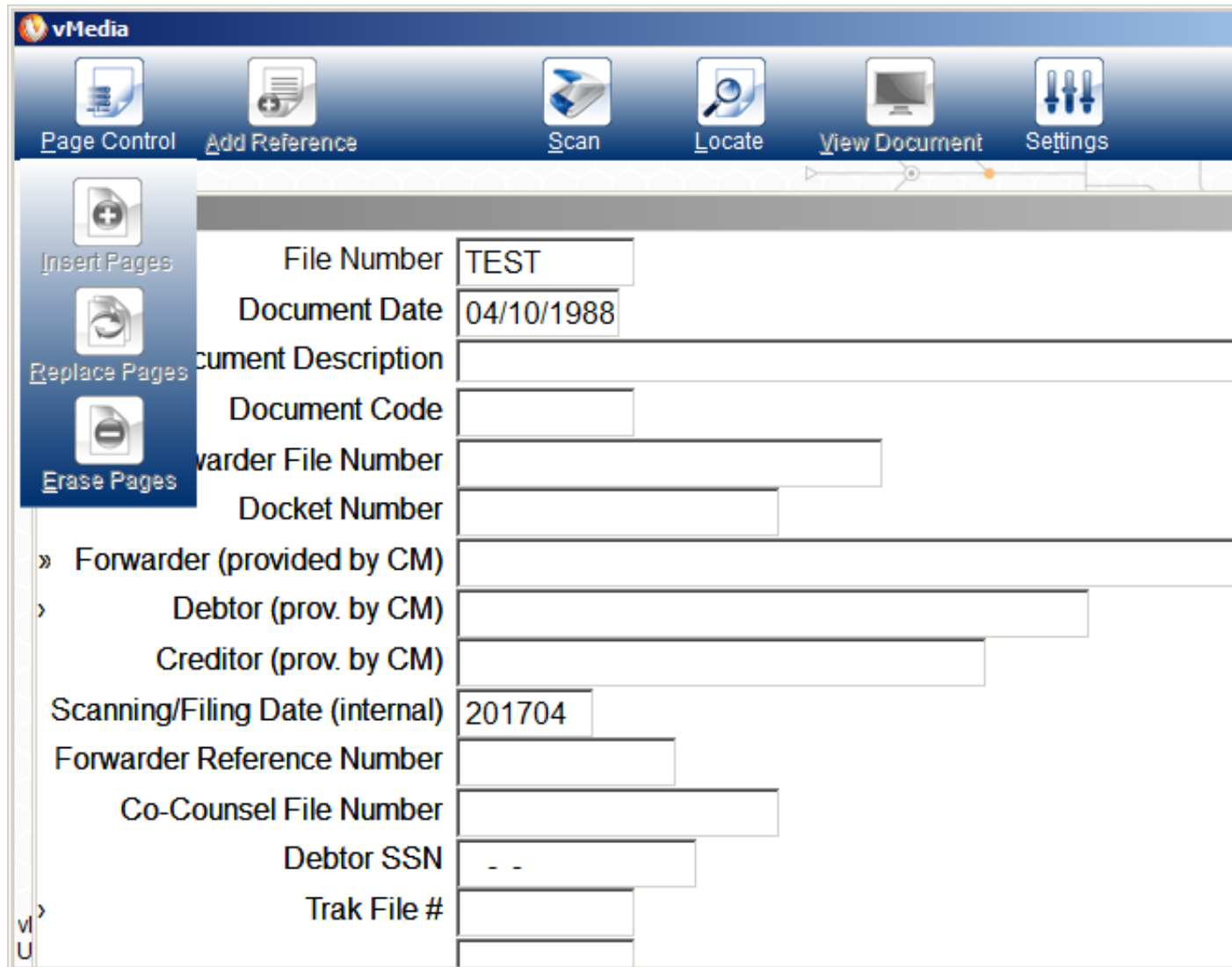
There are three distinct procedures for modifying a scan set:

- Modification of an Unsaved Scan Set
- Modification of a Saved Scan Set
- Modification of a Saved Scan Set when an Unsaved Set exists



Modifying Unsaved Scan Sets

- The following buttons are enabled when an unfiled scan set exist:
 - Scan
 - Erase Page
 - View Document



Modifying a Saved Scan Set

- Icons enabled when modifying a Saved Scan Set
 - Erase Page
 - Add a Reference
 - Scan
 - View Document

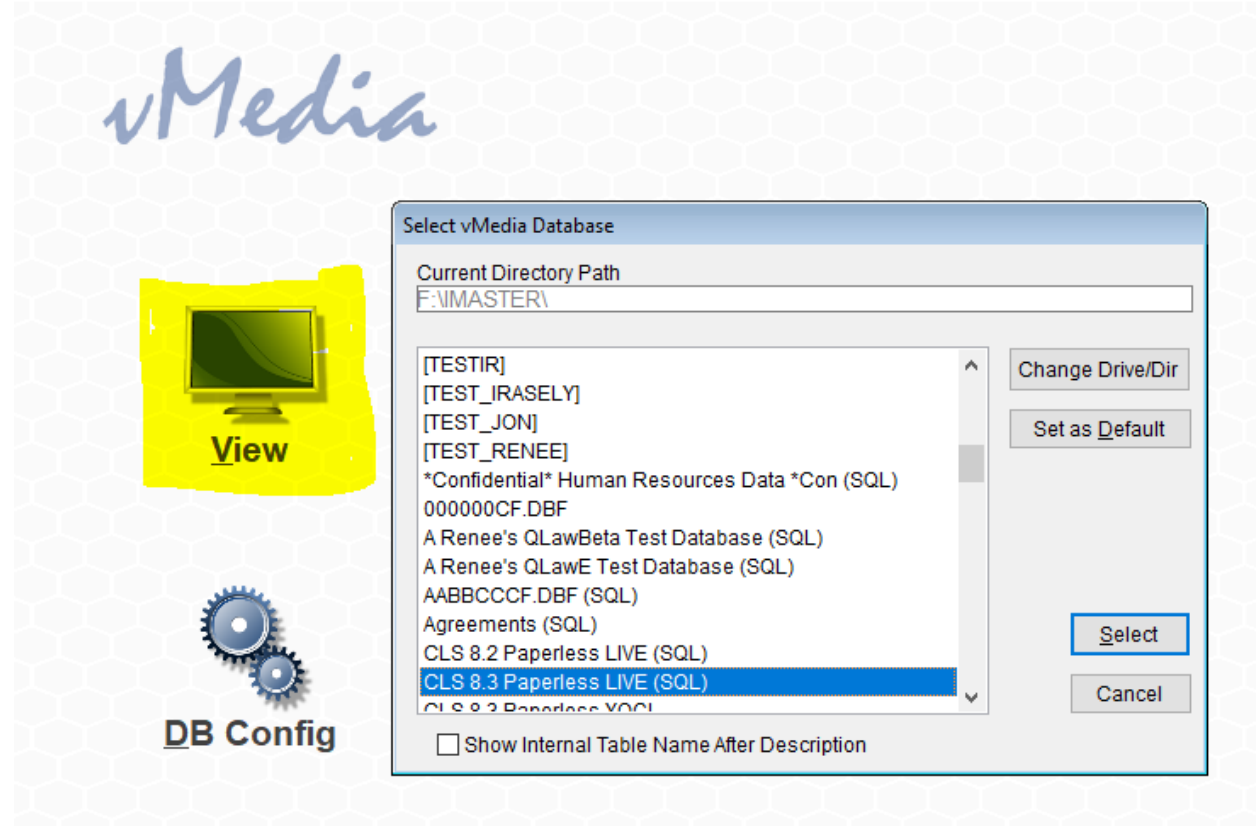
Modifying An Existing Scan Set

Three options for modifying an Existing Scan Set:

- Inserting pages to an Existing Scan Set
- Replacing pages in an Existing Scan Set
- Erasing pages from an Existing Scan Set

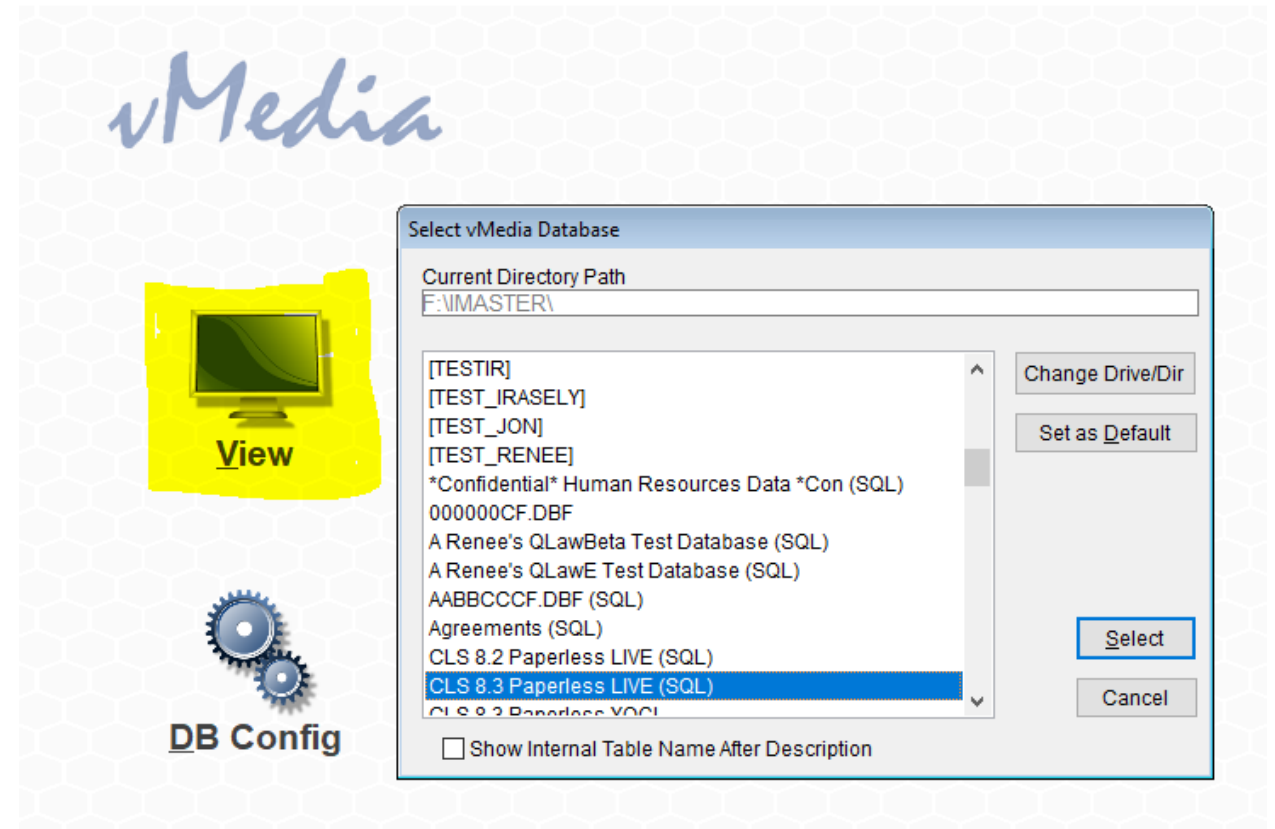
Viewing Stored Electronic Media

Open the Viewing Module to search for and view Media



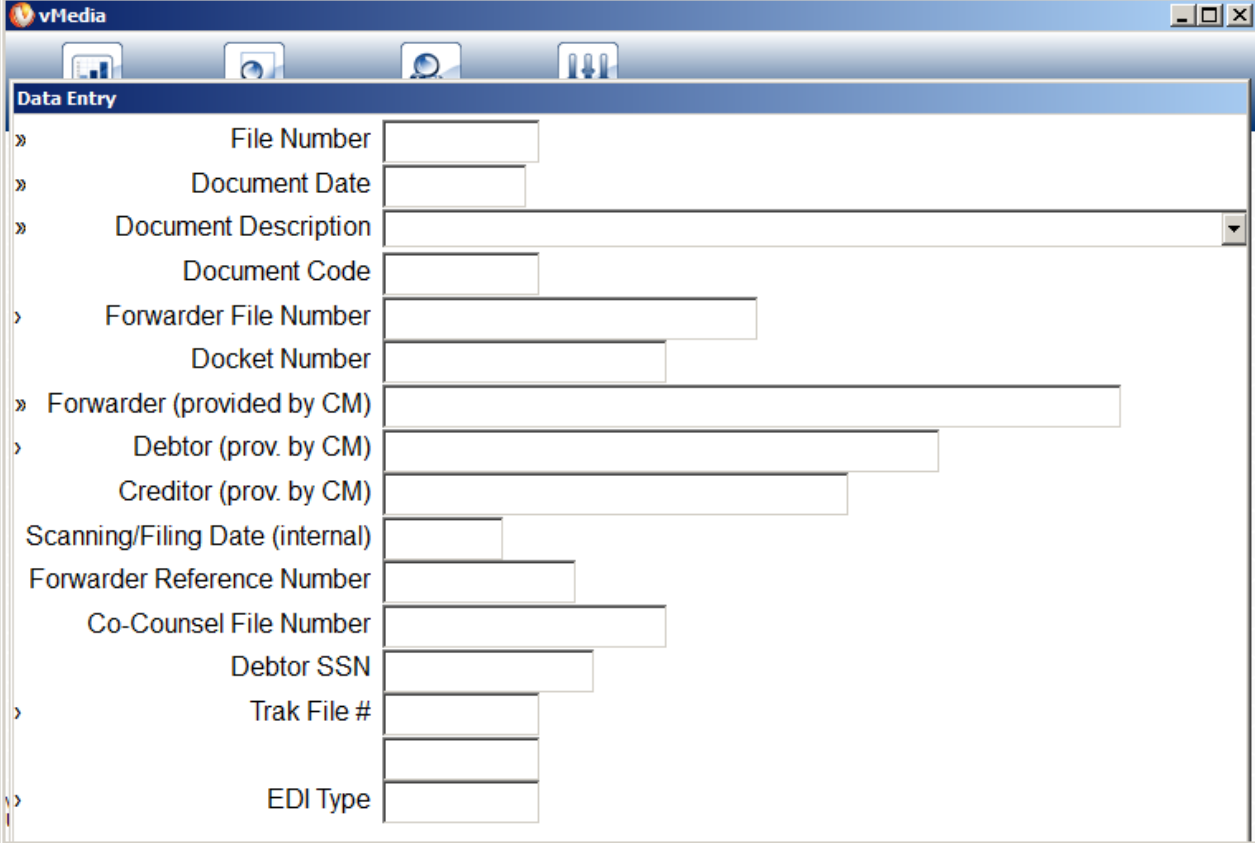
Viewing Stored Electronic Media

Open the Viewing Module to Search for and View Media



Searching Stored Electronic Media

- The data entry screen will open up.
- You can search for media based on any of the index fields you defined in your database

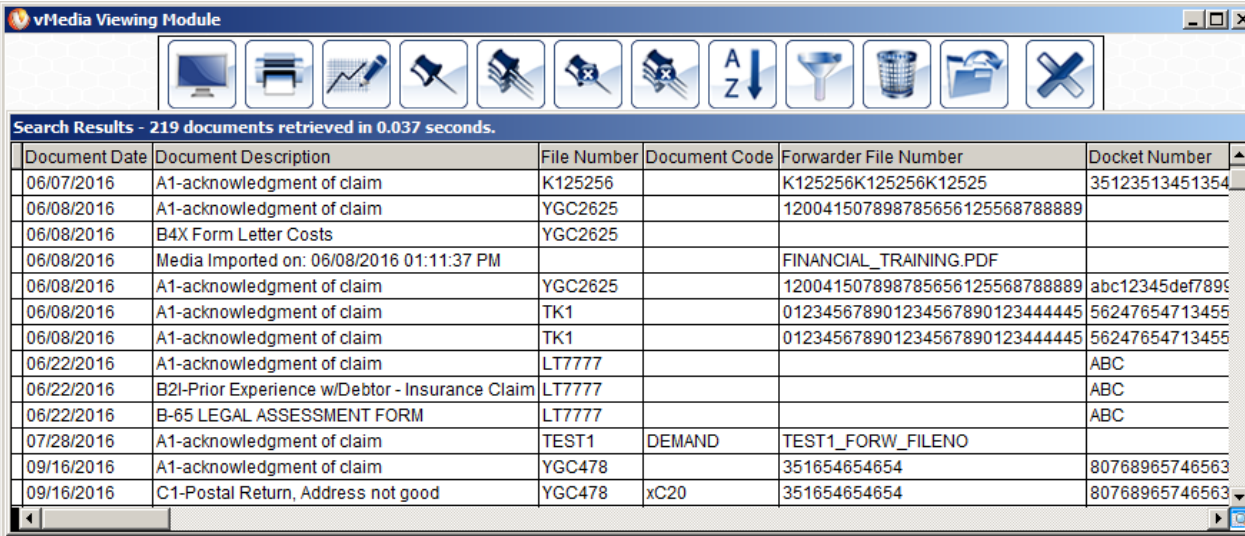


The screenshot shows a software window titled "vMedia" with a "Data Entry" tab. The window contains a list of search fields, each with a corresponding input box. The fields are:

»	File Number	<input type="text"/>
»	Document Date	<input type="text"/>
»	Document Description	<input type="text"/>
	Document Code	<input type="text"/>
>	Forwarder File Number	<input type="text"/>
	Docket Number	<input type="text"/>
»	Forwarder (provided by CM)	<input type="text"/>
>	Debtor (prov. by CM)	<input type="text"/>
	Creditor (prov. by CM)	<input type="text"/>
	Scanning/Filing Date (internal)	<input type="text"/>
	Forwarder Reference Number	<input type="text"/>
	Co-Counsel File Number	<input type="text"/>
	Debtor SSN	<input type="text"/>
>	Trak File #	<input type="text"/>
		<input type="text"/>
>	EDI Type	<input type="text"/>

Working with Stored Electronic Media

- Search Results will appear
- Results can be sorted or filtered
- What you can do:
 - View
 - Print
 - Edit
 - Delete
 - Export



The screenshot shows the vMedia Viewing Module interface. At the top, there is a toolbar with icons for viewing, printing, editing, deleting, and exporting. Below the toolbar, a status bar indicates "Search Results - 219 documents retrieved in 0.037 seconds." The main area contains a table with the following columns: Document Date, Document Description, File Number, Document Code, Forwarder File Number, and Docket Number.

Document Date	Document Description	File Number	Document Code	Forwarder File Number	Docket Number
06/07/2016	A1-acknowledgment of claim	K125256		K125256K125256K12525	35123513451354
06/08/2016	A1-acknowledgment of claim	YGC2625		120041507898785656125568788889	
06/08/2016	B4X Form Letter Costs	YGC2625			
06/08/2016	Media Imported on: 06/08/2016 01:11:37 PM			FINANCIAL_TRAINING.PDF	
06/08/2016	A1-acknowledgment of claim	YGC2625		120041507898785656125568788889	abc12345def789
06/08/2016	A1-acknowledgment of claim	TK1		012345678901234567890123444445	56247654713455
06/08/2016	A1-acknowledgment of claim	TK1		012345678901234567890123444445	56247654713455
06/22/2016	A1-acknowledgment of claim	LT7777			ABC
06/22/2016	B2I-Prior Experience w/Debtor - Insurance Claim	LT7777			ABC
06/22/2016	B-65 LEGAL ASSESSMENT FORM	LT7777			ABC
07/28/2016	A1-acknowledgment of claim	TEST1	DEMAND	TEST1_FORW_FILENO	
09/16/2016	A1-acknowledgment of claim	YGC478		351654654654	80768965746563
09/16/2016	C1-Postal Return, Address not good	YGC478	xC20	351654654654	80768965746563

Spectrum Exporter

- Define path to export to
- Choose whether to create zip file
- Create your own expression using metadata

The screenshot shows the 'Spectrum Media Exporter' dialog box. At the top, it says 'Export Media Objects and Documents in a wide variety of formats.' Below this is a 'Select Profile:' dropdown menu set to 'DEFAULT'. The main area is titled 'Location' and contains two radio button options: 'Export to Path, Starting at Location:' (selected) with a text field containing 'c:\imaster\export\spectrum\' and a folder icon, and 'Export to Compressed (ZIP) File:' with an empty text field and a folder icon. Below the second option is a text field for 'Password for Compressed File (optional)'. The next section is 'Exported Media File Name Expression' with a text field containing 'TRIM(FILENO)+"_" + TRIM(CMT)+"_" + DTOS(DDATE)' and a gear icon. Below that is a checked checkbox 'Create or Append to Processing Log File:' with a text field containing 'EXPORT_Spectrum_Log.Txt' and a folder icon. At the bottom, there are three tabs: 'Output' (selected), 'Export Options', and 'Manifest'. Below the tabs is a 'Processing Object:' text field. At the very bottom are three buttons: 'Save Profile', 'Export Media', and 'Cancel'.

Spectrum Exporter

- Combine, export individually, or convert
- Filter which documents to export

The screenshot shows the 'Spectrum Media Exporter' dialog box. At the top, it says 'Export Media Objects and Documents in a wide variety of formats.' Below this is a 'Select Profile:' dropdown menu set to 'DEFAULT'. The main area is divided into two sections: 'Format Conversion' and 'Filter'. The 'Format Conversion' section has two sub-sections: 'Serialized Documents' and 'Non-Serialized TIF,PDF,DOC Documents'. Under 'Serialized Documents', there are three radio button options: 'Combine Pages, Retain Original Format' (selected), 'Export Each Page Individually, Retain Original Format', and 'Combine Pages, Convert to:' followed by a dropdown menu. Under 'Non-Serialized TIF,PDF,DOC Documents', there are two radio button options: 'Retain Original Format' (selected) and 'Convert to:' followed by a dropdown menu. The 'Filter' section has three radio button options: 'Export all Tagged Media Objects' (selected), 'Exclude all Non-Document Media Objects', and 'Only Export Media Objects with the Following Comma Delimited Extensions:' followed by a text input field. At the bottom, there are three tabs: 'Output', 'Export Options' (which is active), and 'Manifest'. Below the tabs is a 'Processing Object:' text field. At the very bottom, there are three buttons: 'Save Profile', 'Export Media', and 'Cancel'.

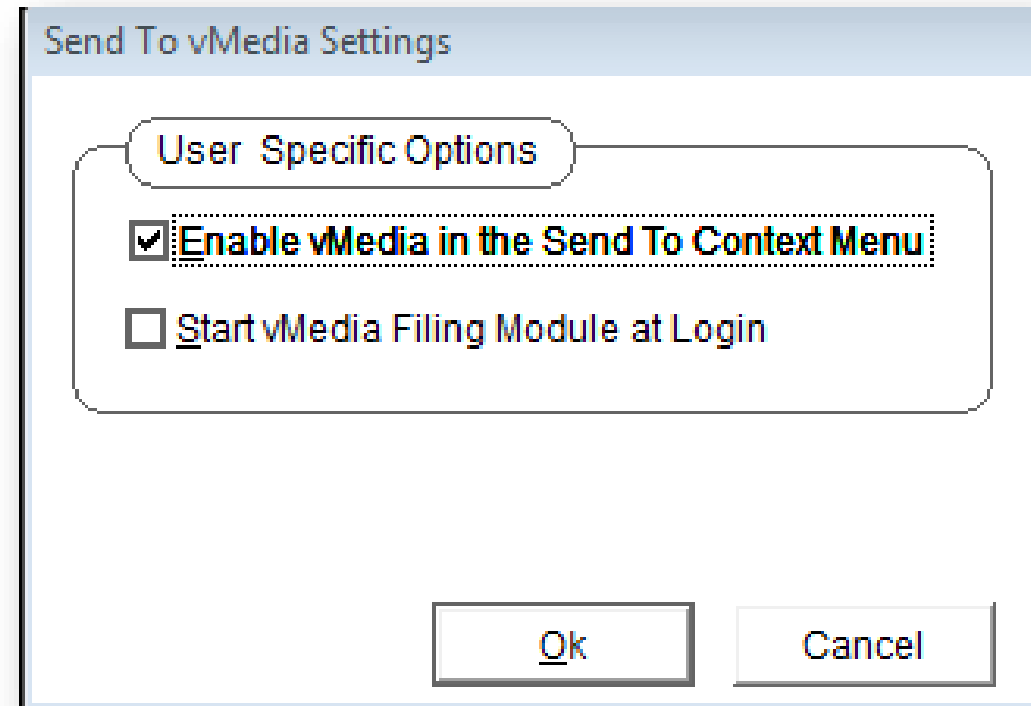
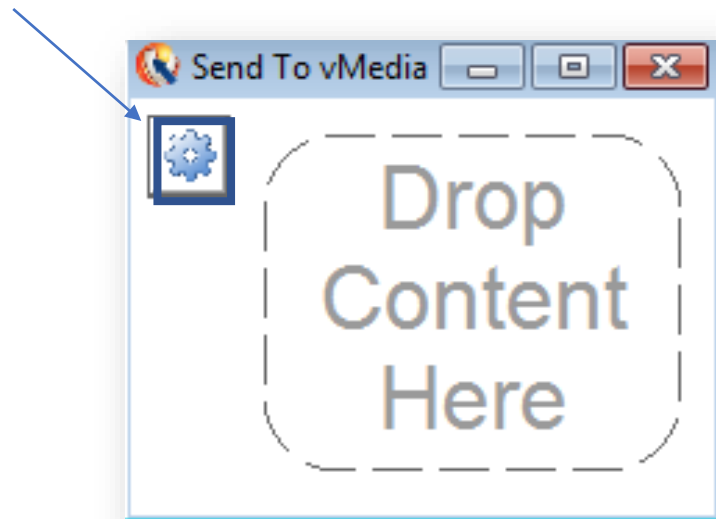
Send to vMedia

- Store any type of media supported by Windows.
- ***Send to vMedia*** icon.
- File will open in the default program.



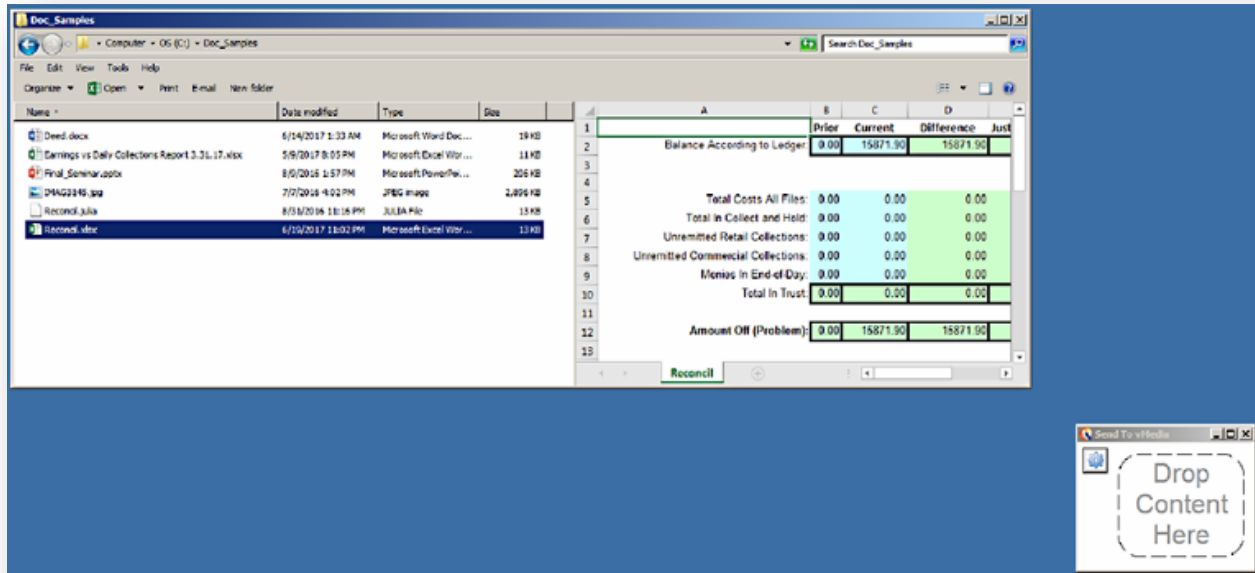
Enable “Send To” option

- Open send to vMedia, click on gear :
- Select “Enable vMedia in the Send To Context Menu”

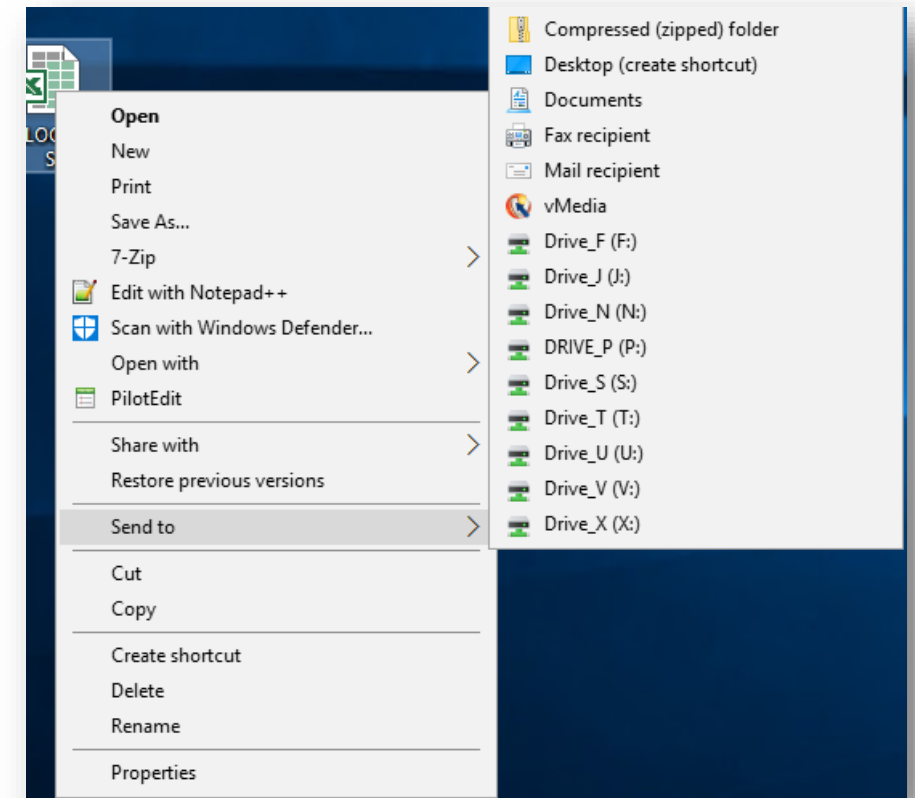


Using Send to vMedia

- Two methods to save files to vMedia
 - Drag-and-drop



- Via the right-click context menu



Send to vMedia

- The filing window will appear:

vMedia Send to vMedia version 8.1.2.1

Change Database Save View Document Close

Data Entry

File Number

Document Date 06/19/2017

Document Description

Document Code

Forwarder File Number

Docket Number

Forwarder (provided by CM)

Debtor (prov. by CM)

Creditor (prov. by CM)

Scanning/Filing Date (internal) 201706

Forwarder Reference Number

Debtor SSN

Primary Secondary

NOT FOUND

- Conflict Resolution:

Media Reference Already Exists

Re-Enter Filing Information

Save Duplicate Separately

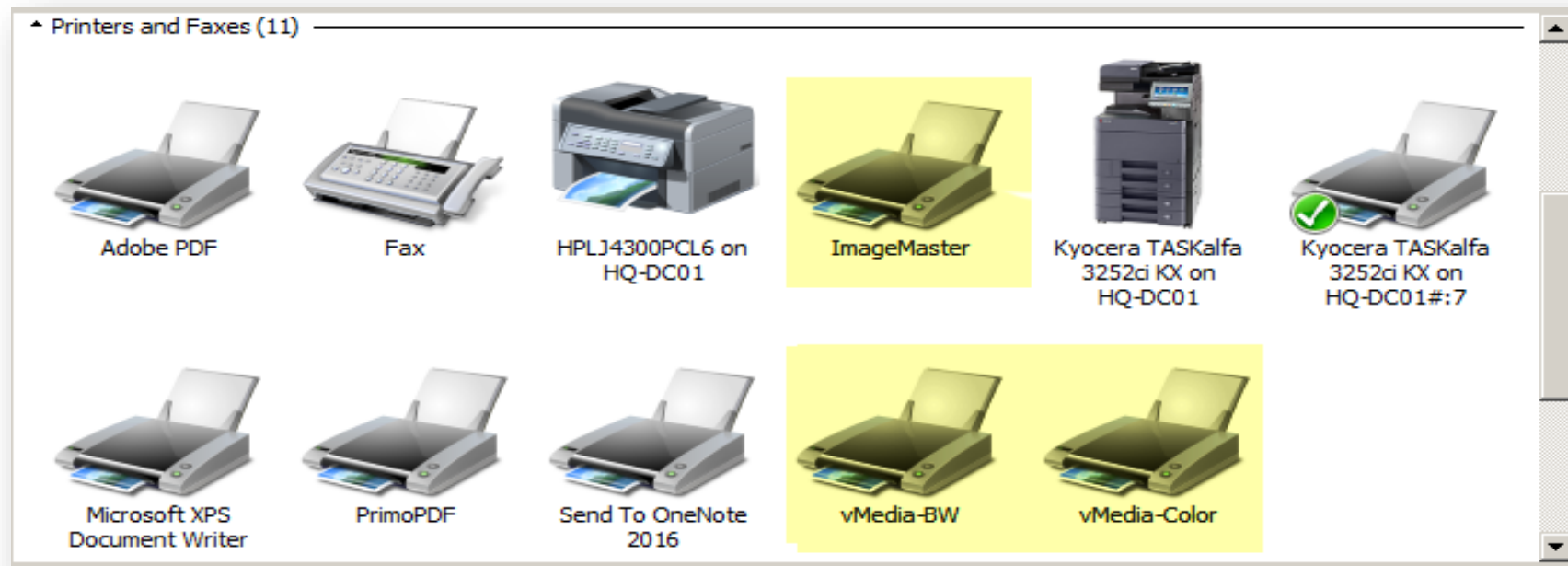
Append to Existing Document

Replace Existing Media

Discard and Cancel

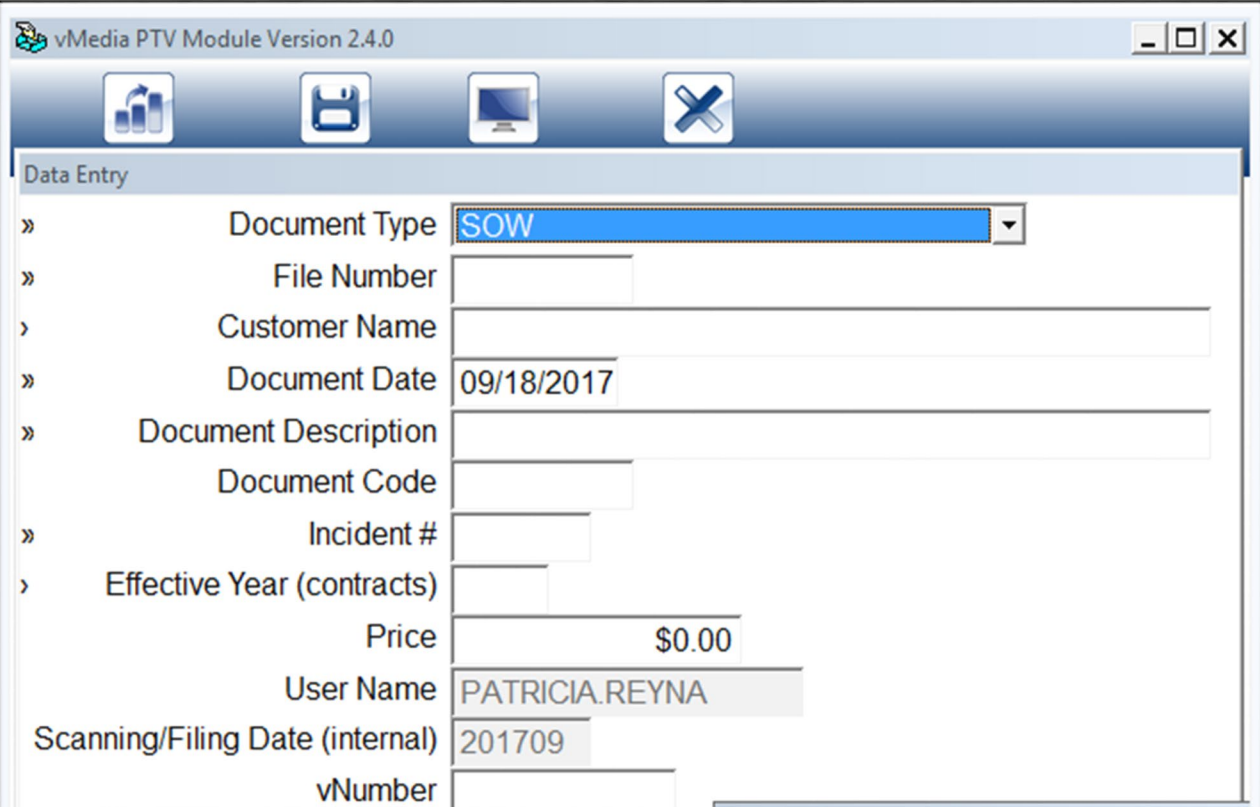
Print to vMedia

- Appears as a virtual printer in Microsoft Windows.
- Any application that can print to a Windows printer can utilize Print to vMedia.
- Converts the paper document into an electronic file.



How To Use Print To vMedia

- Ability to choose vMedia printer from most Windows-based applications.
- Choose the desired database.
- Windows will keep printer in memory.
- Automatically select user's default database.

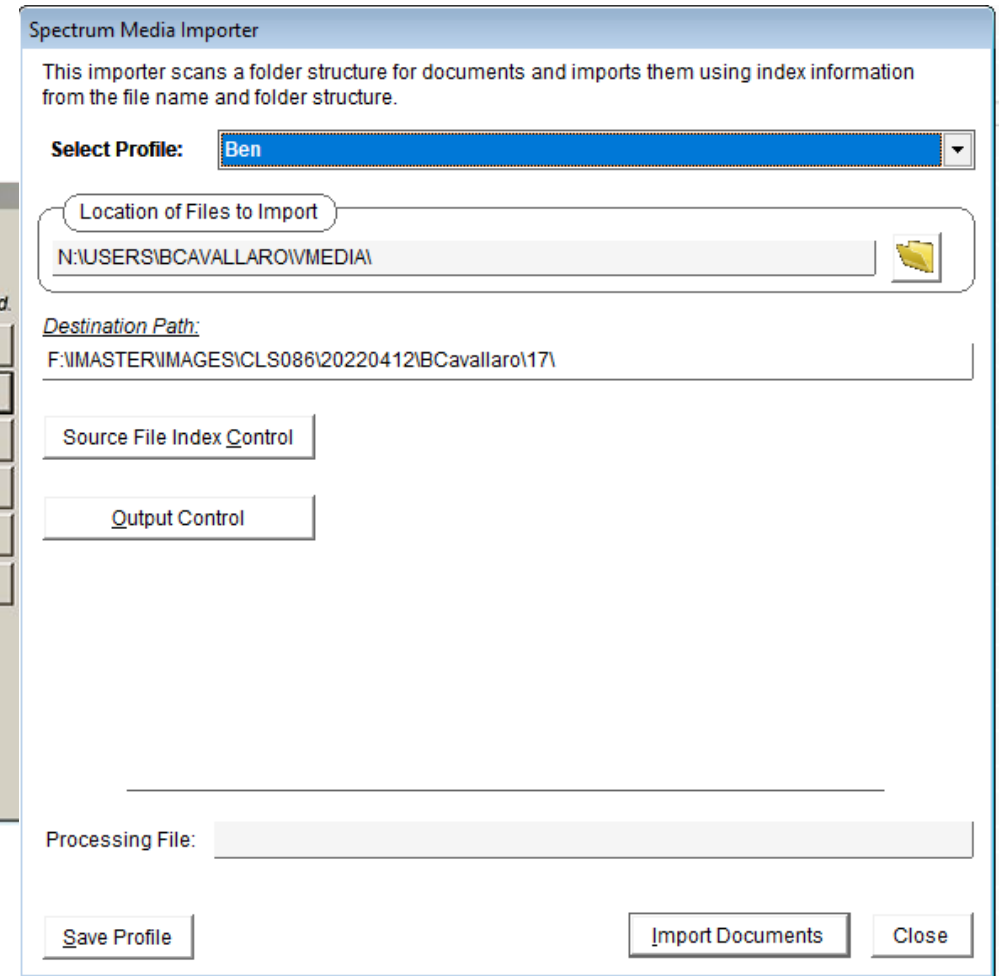


The screenshot shows a Windows application window titled "vMedia PTV Module Version 2.4.0". The window contains a "Data Entry" form with the following fields and values:

Field	Value
Document Type	SOW
File Number	
Customer Name	
Document Date	09/18/2017
Document Description	
Document Code	
Incident #	
Effective Year (contracts)	
Price	\$0.00
User Name	PATRICIA.REYNA
Scanning/Filing Date (internal)	201709
vNumber	

Spectrum Importer

- vMedia SQL is required
- Files must be in at least one subfolder of the base import path



Spectrum Importer

- Subfolder name may be used for indexing
- Filename may be used for indexing
- Create your own custom expressions

Spectrum Document Importer - Index Control

Indexing Control Expressions

Primary Index Key
fileno WITH pRelPath

Primary Index Key
S fileno=pRelPath

Secondary Index Key
T cmt=pFileName

Processing Variables Quick Reference:
pFileName=File Name (Including Extension) of file being imported.
pPath=Complete path to the file being imported.
pRelPath=The relative path to the file being imported excluding the starting path.
pFileDate=Last Modified Date of file being imported.

Source File Concatenation

Enable Source File Concatenation

Source File Concatenation Template Expression

File Name Processing Order

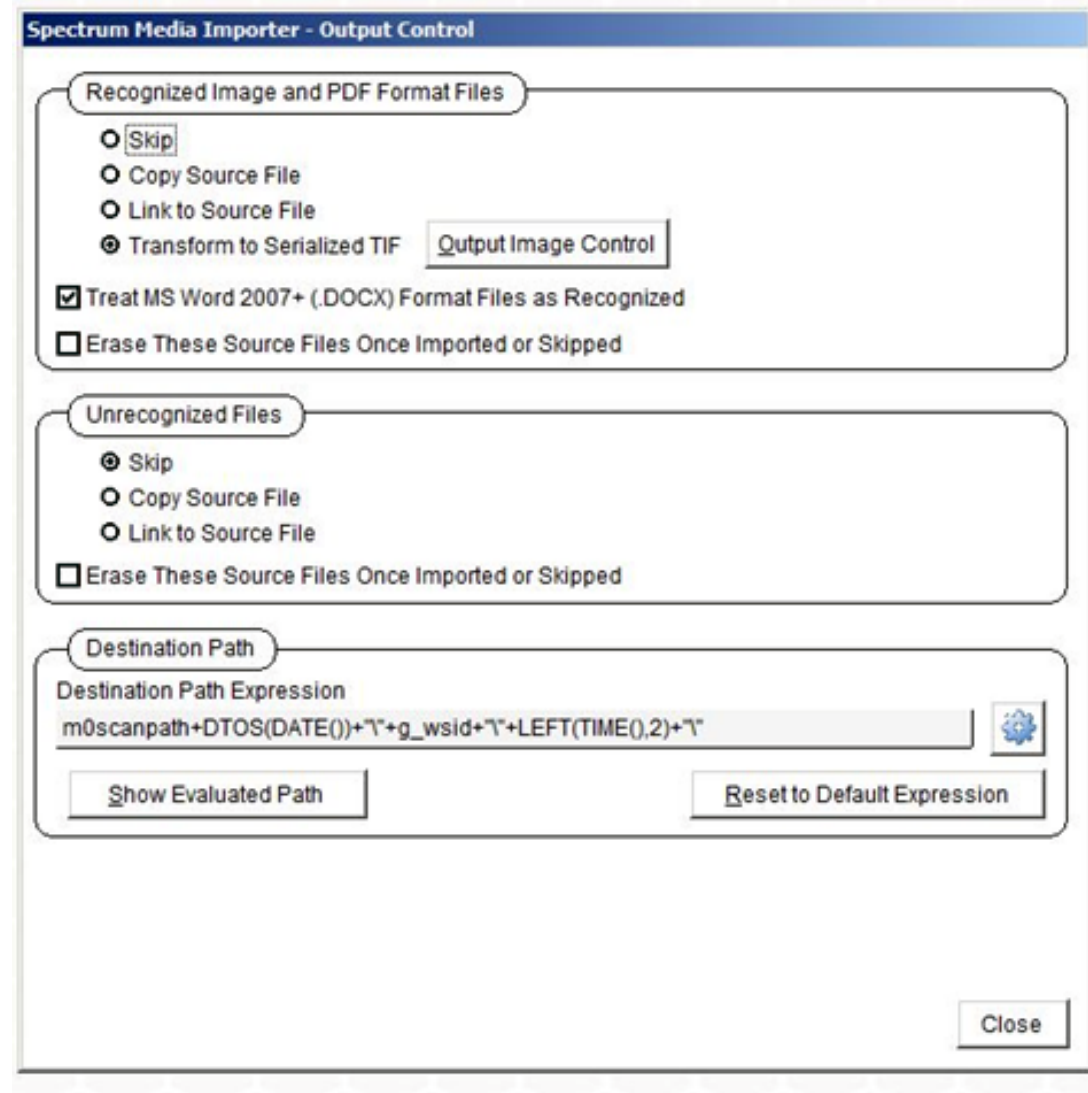
Natural / Windows Explorer Order

ASCII Left to Right Order

Close

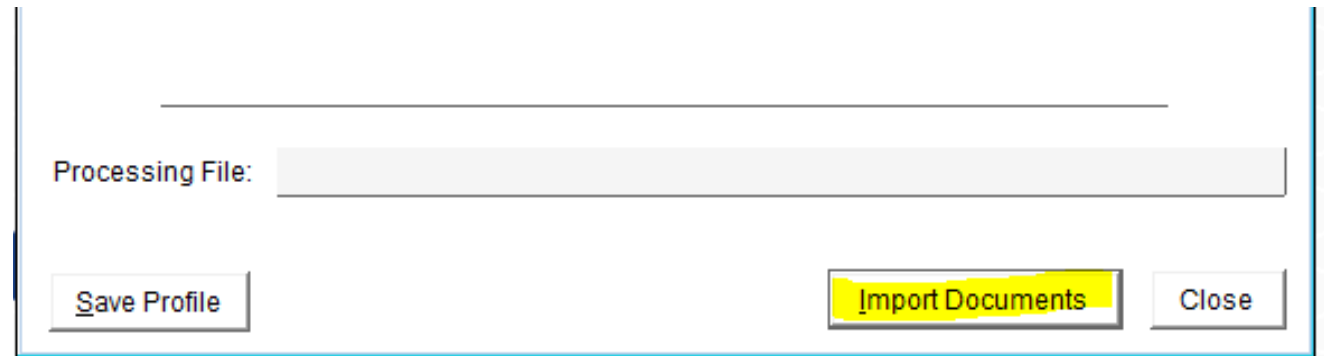
Spectrum Importer

- Copy, move or transform files
- Decide what to do with files that don't match your validation criteria
- Define the destination file location and name



Spectrum Importer - Example

- I Create a folder C:\vmedia
- There is one folder inside that folder, vmtest
- There is one file inside that folder, TESTBEN.PDF
- I click Import Documents on the Spectrum Importer Screen
- My document has been added to the database

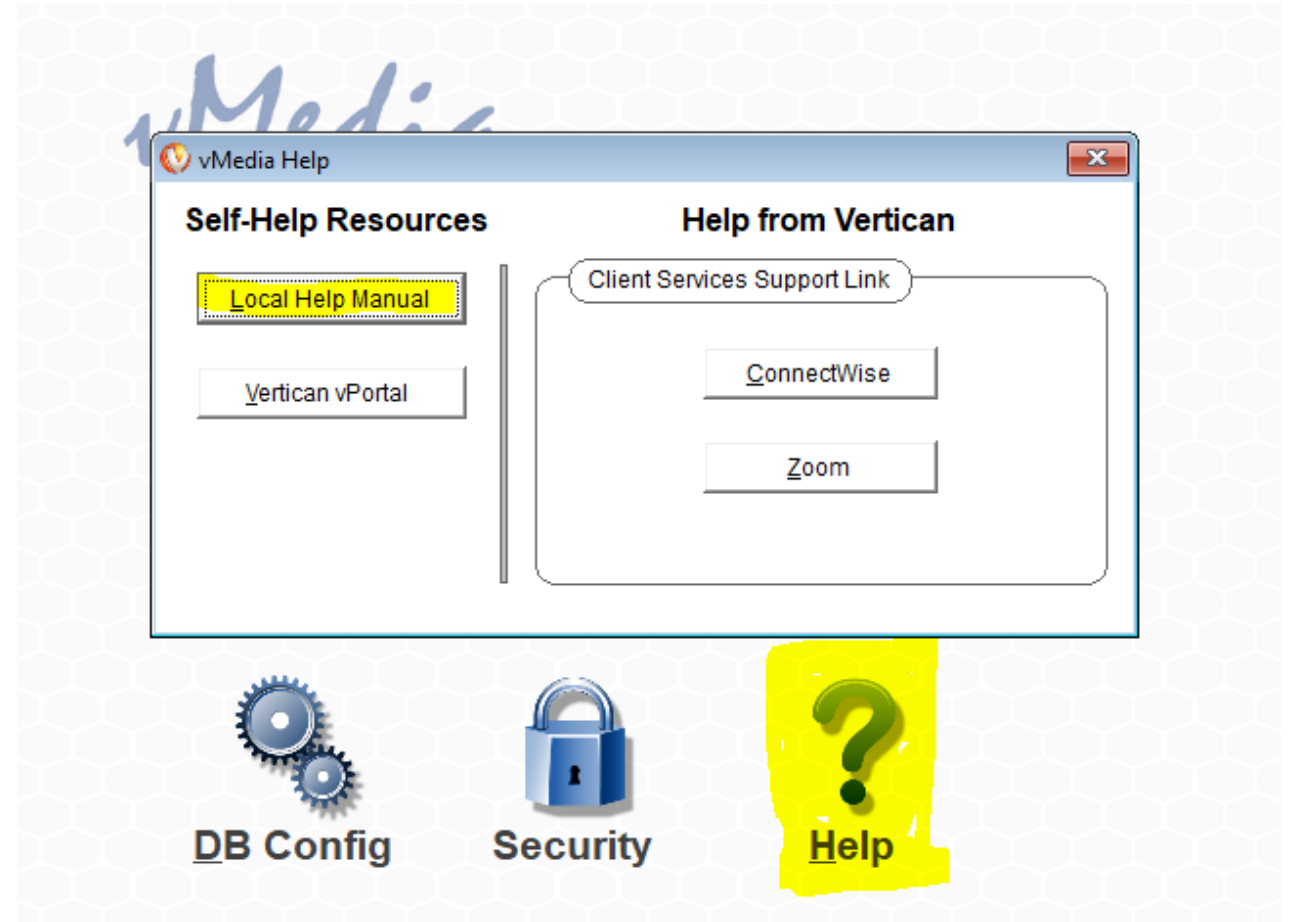


The screenshot shows a search results table with a toolbar above it. The toolbar contains icons for monitor, printer, chart, pushpin, hand, magnifying glass, A-Z, funnel, trash, folder, and close. The table header is 'SQL Server Search Results - 2 documents retrieved in 0.023 seconds.' The table has columns: Tag, File Number Test, Document Date, Document Description, Document Code, Forwarder File Number, and Docket Number For. The first row is highlighted in yellow and contains the following data:

Tag	File Number Test	Document Date	Document Description	Document Code	Forwarder File Number	Docket Number For
<input type="checkbox"/>	VMTEST	2019-03-04	TESTBEN.PDF			

Resources

- vMedia Help Manual
 - Available on the vPortal:
<https://vportal.vertican.com/Help/VME>
 - Comes with vMedia (see image to the right)



vMedia 3.0

- Integration with Q-LawE documents section & Print to vMedia supported for Q-Law/Q-LawE
- Full support for SQL Server databases
- SQL User Access: Allows your firm to connect to SQL Server using one or more SQL Server user accounts instead of using the user's Windows Account providing much better access security
- Better user access logs and ability to lock users out of vMedia to perform upgrades
- vDiagnostics program to help Vertican support find issues quicker
- Expanded lapsed license window to 28 days, after which you have 1 admin user forever
- Vertican In-App Marketing Messaging Service

Questions?

- Ask Now!
- E-Mail me at Ben.Cavallaro@vertican.com