vMEDIA 101

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The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

Overview of Today's MMS

o Setup, installation and VLM

o Scanning documents to vMedia
- o How to save documents to vMedia
- o Modifying unsaved scan sets

o Viewing stored electronic media
- o Searching, sorting and viewing
- o Printing, editing and exporting

o Send to vMedia

o Print to vMedia

o 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

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.

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Vertican License Manager

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

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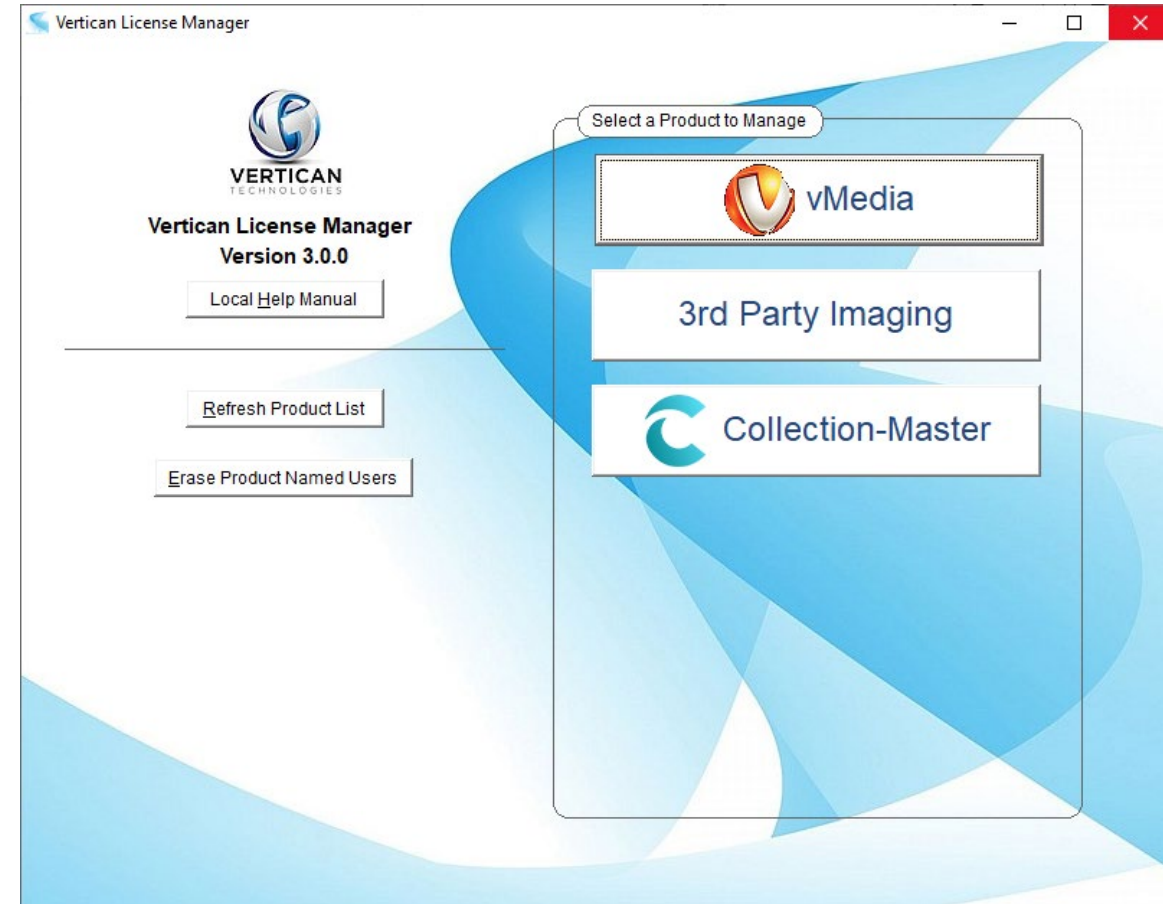
Vertican License Manager

- 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

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

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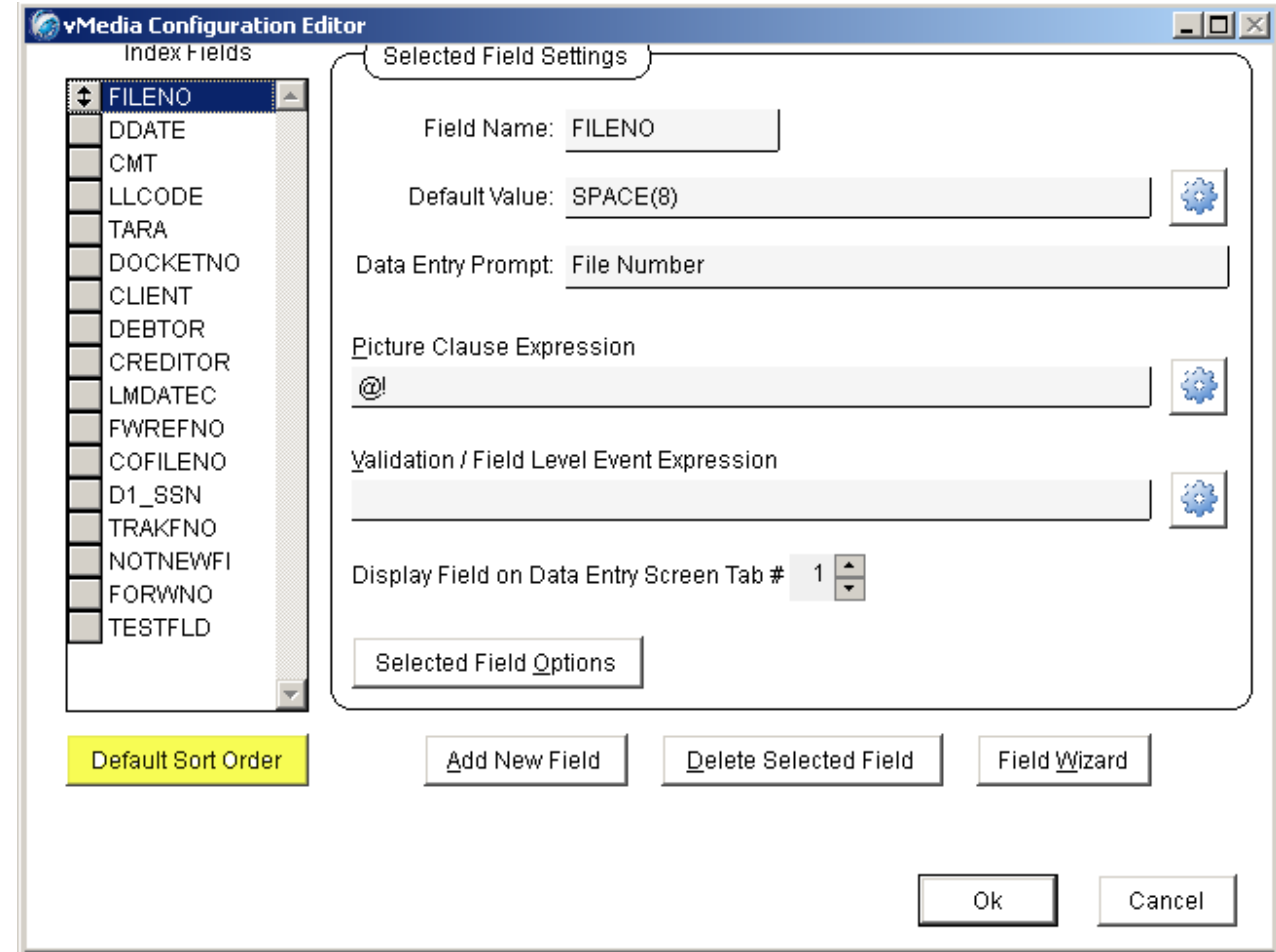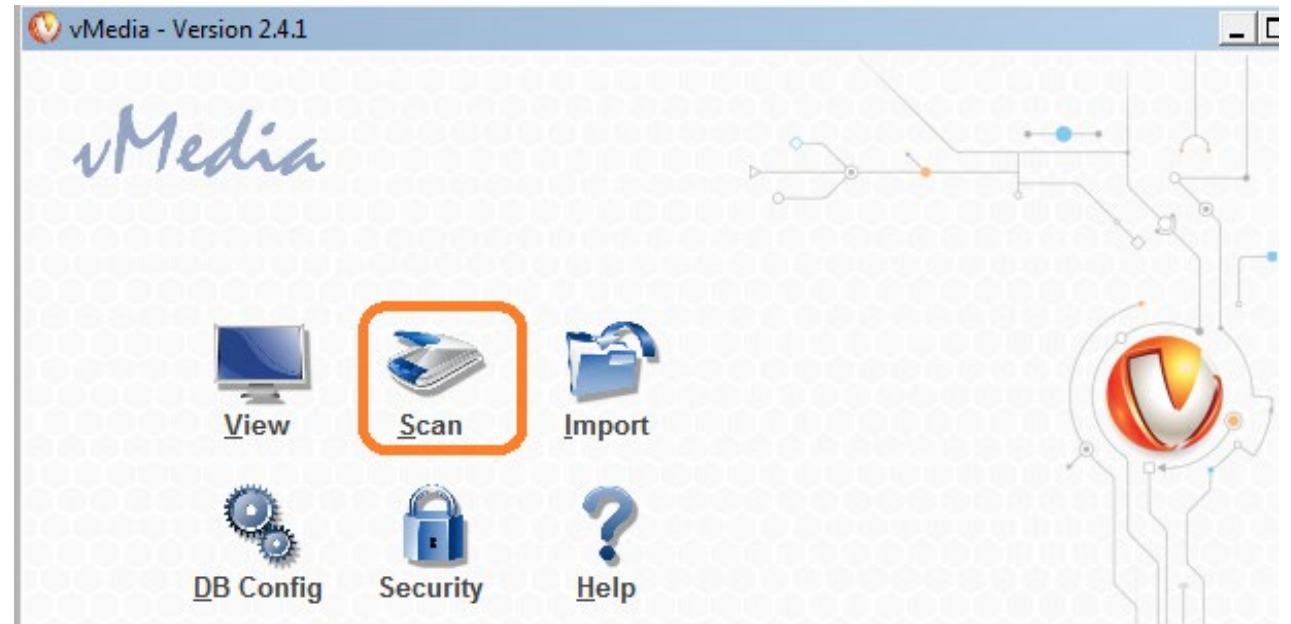
- You can define the fields in your database
  - Field Name
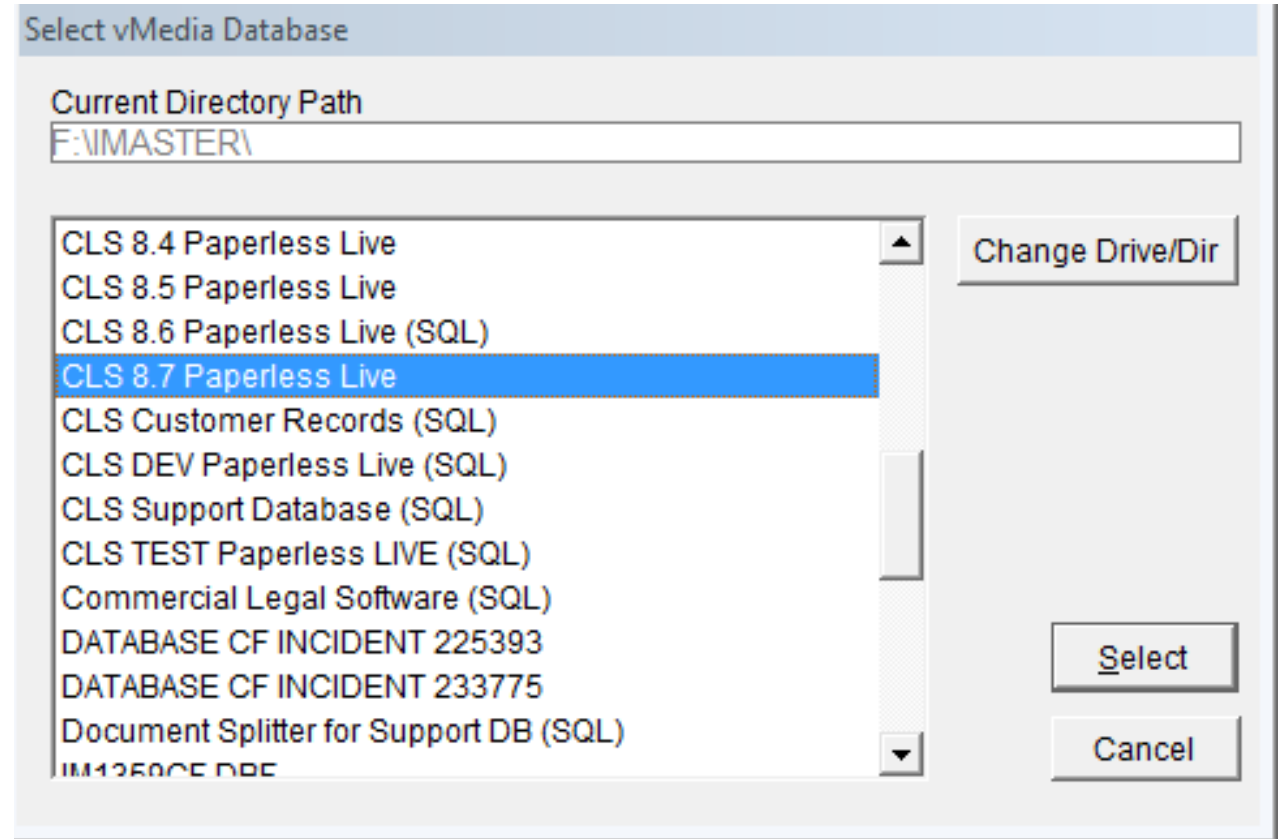 - Default Value
  - Data Entry Prompt

Scanning To vMedia

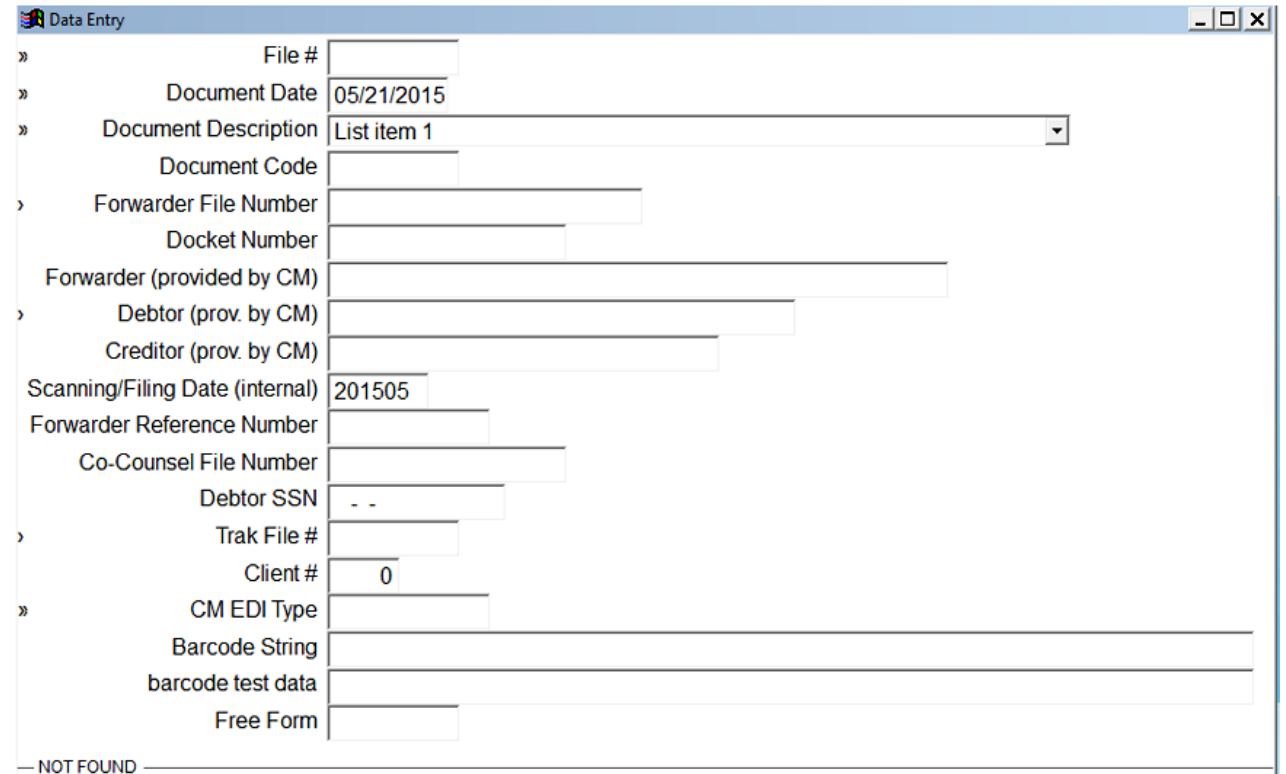- Login to vMedia. Select the **Scan** icon.

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.

Scanning To vMedia

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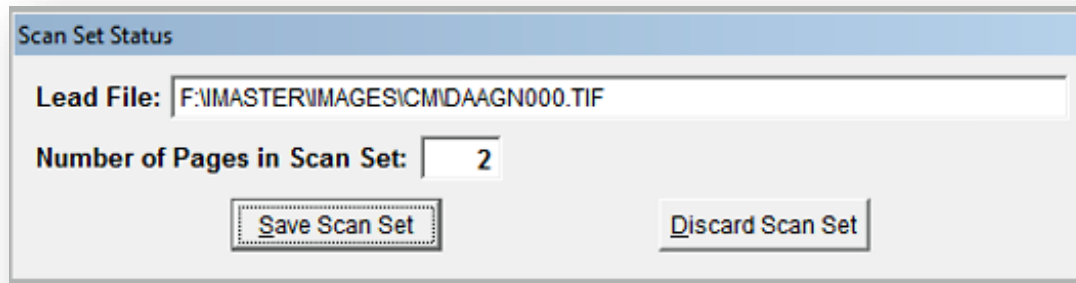 - Multi-Page Scanning Mode
  - Fully Automated Scanning

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

Start Scanning

Insert Pages to be Scanned
Into the Document Feeder

Ok   Cancel

☑ Use Automatic Document Feeder

☑ Multi-Page Scanning Mode

☐ Fully Automated Scanning

☐ Scan in Full Color
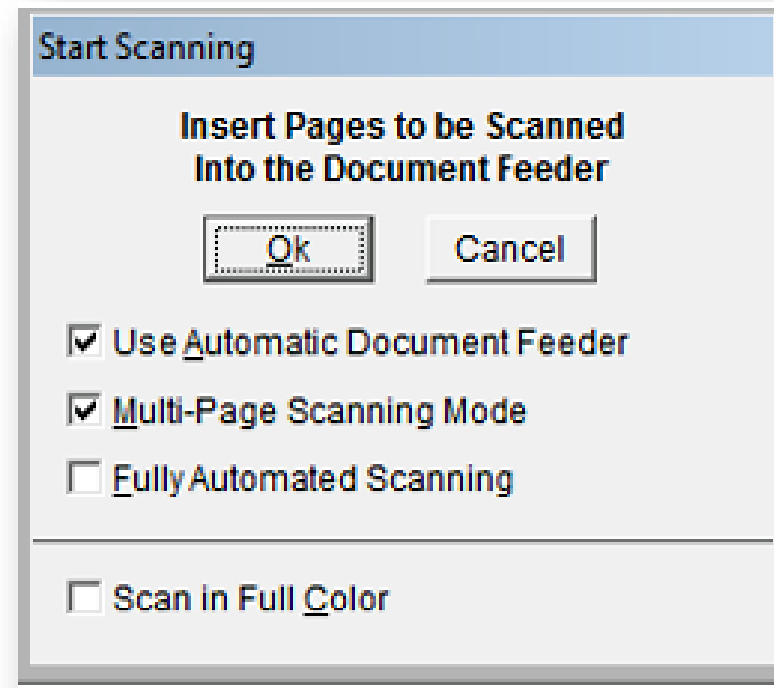
Multi/Single Page Scanning Mode
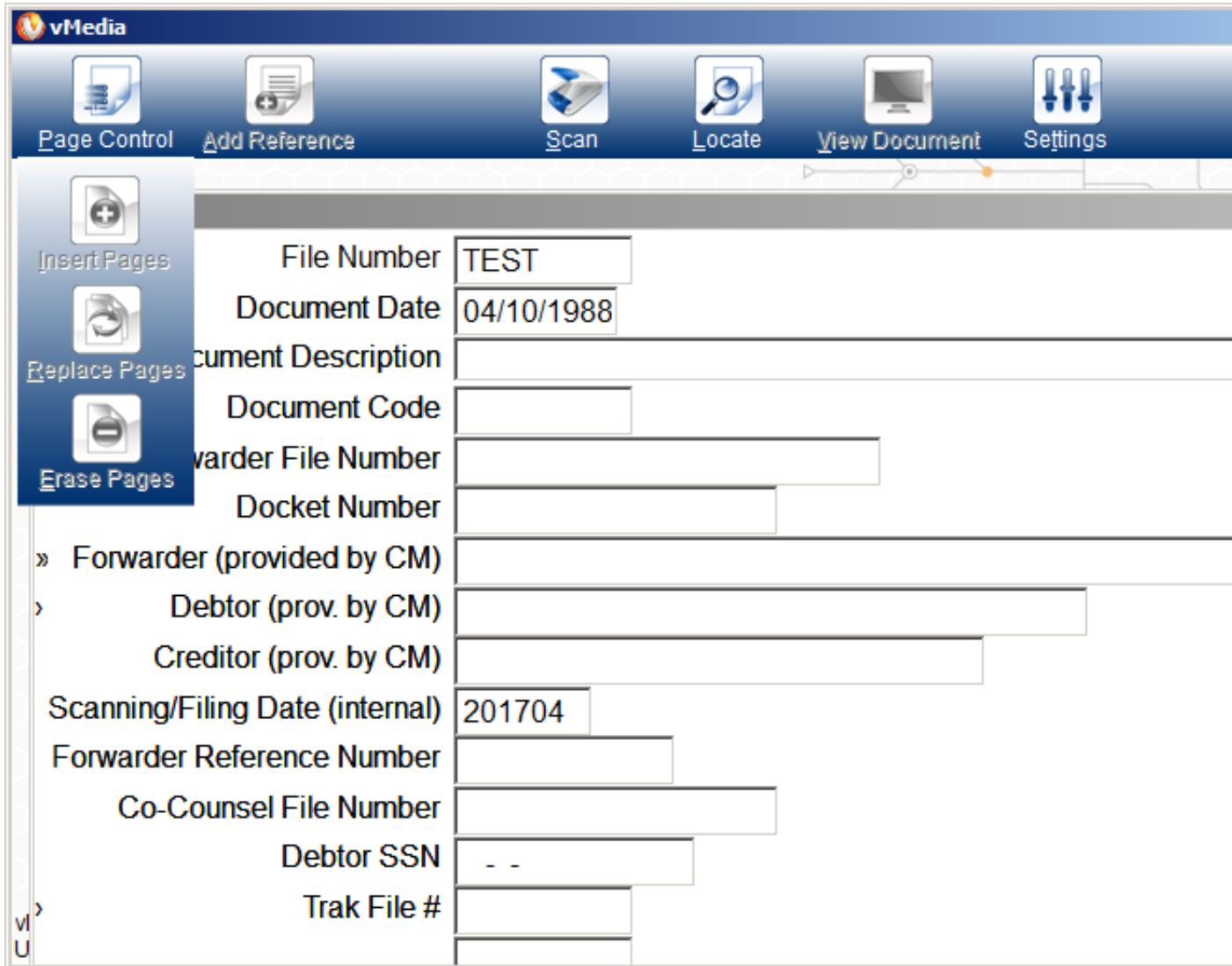
Multi-page Scanning Mode:
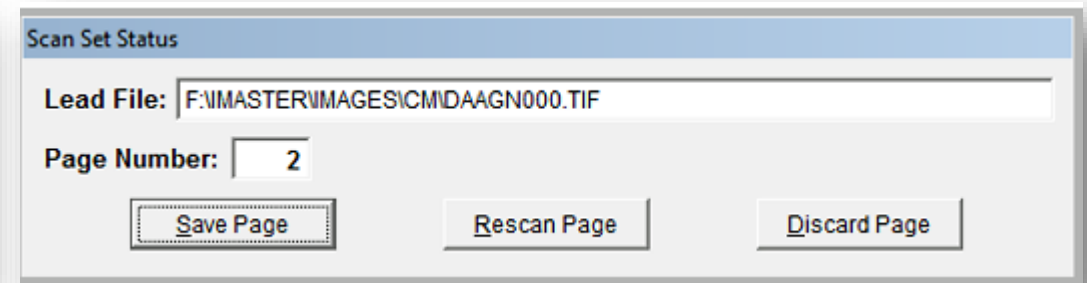
Single-page Scanning Mode:

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

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Modifying Unsaved Scan Sets

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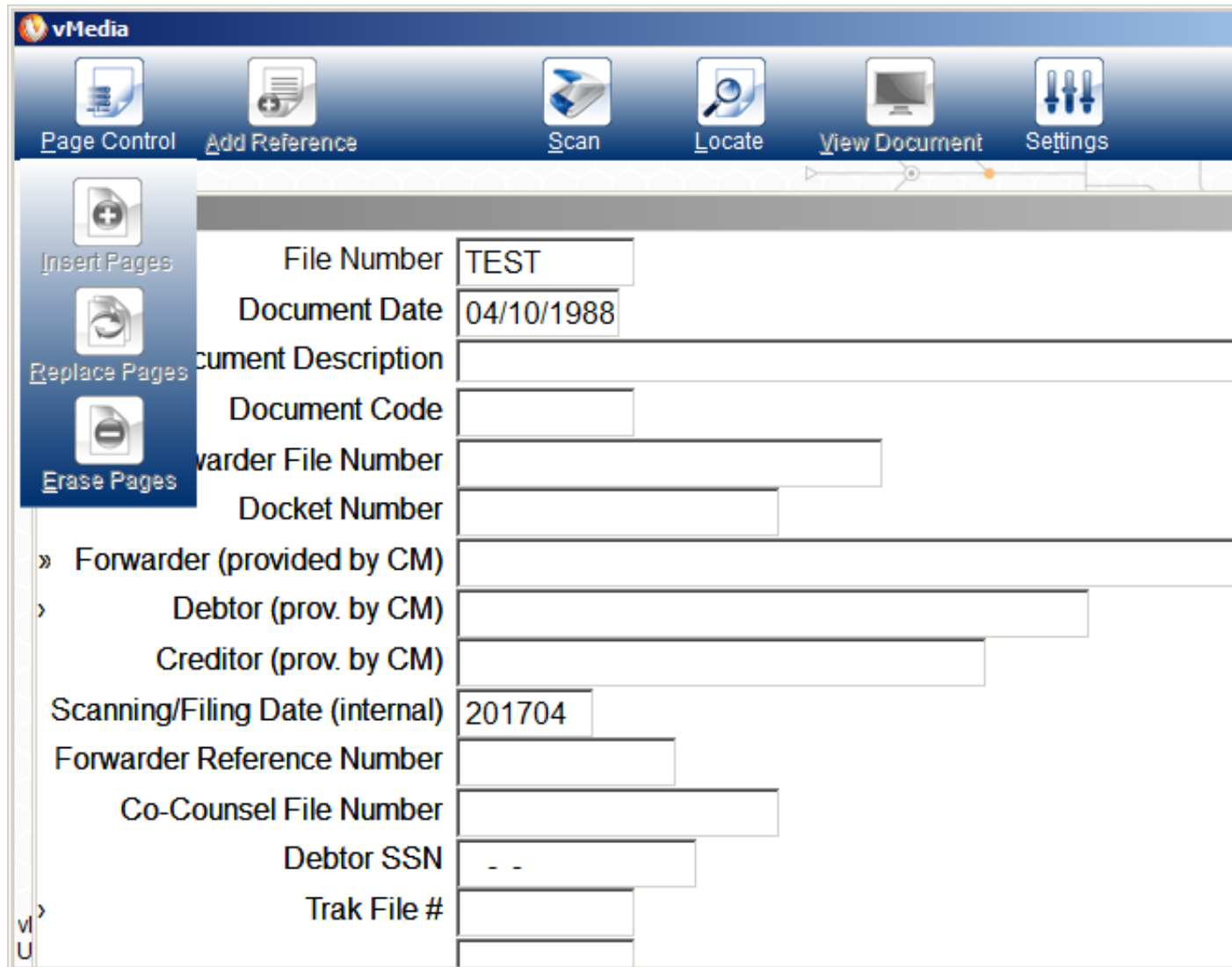
Modifying a Saved Scan Set

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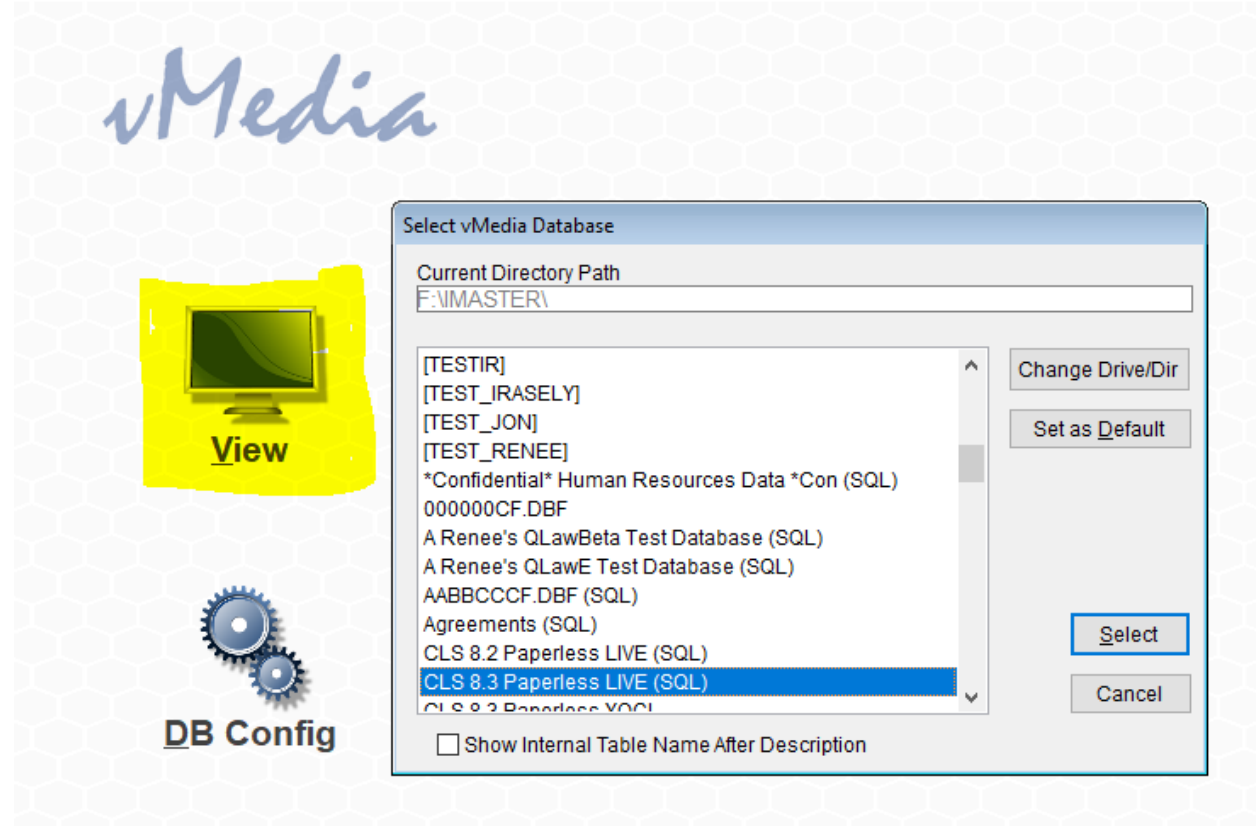 - Scan
  - View Document

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
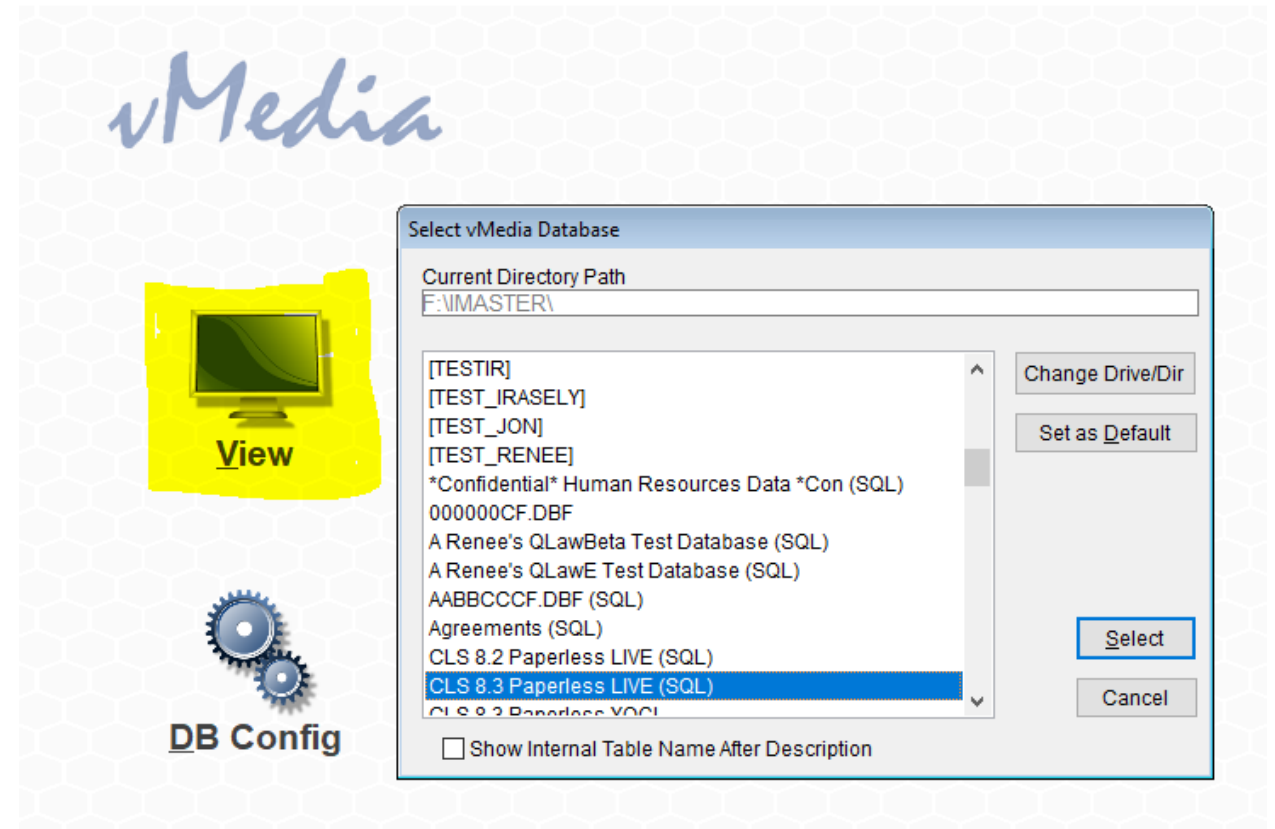- Erasing pages from an Existing Scan Set

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Viewing Stored Electronic Media

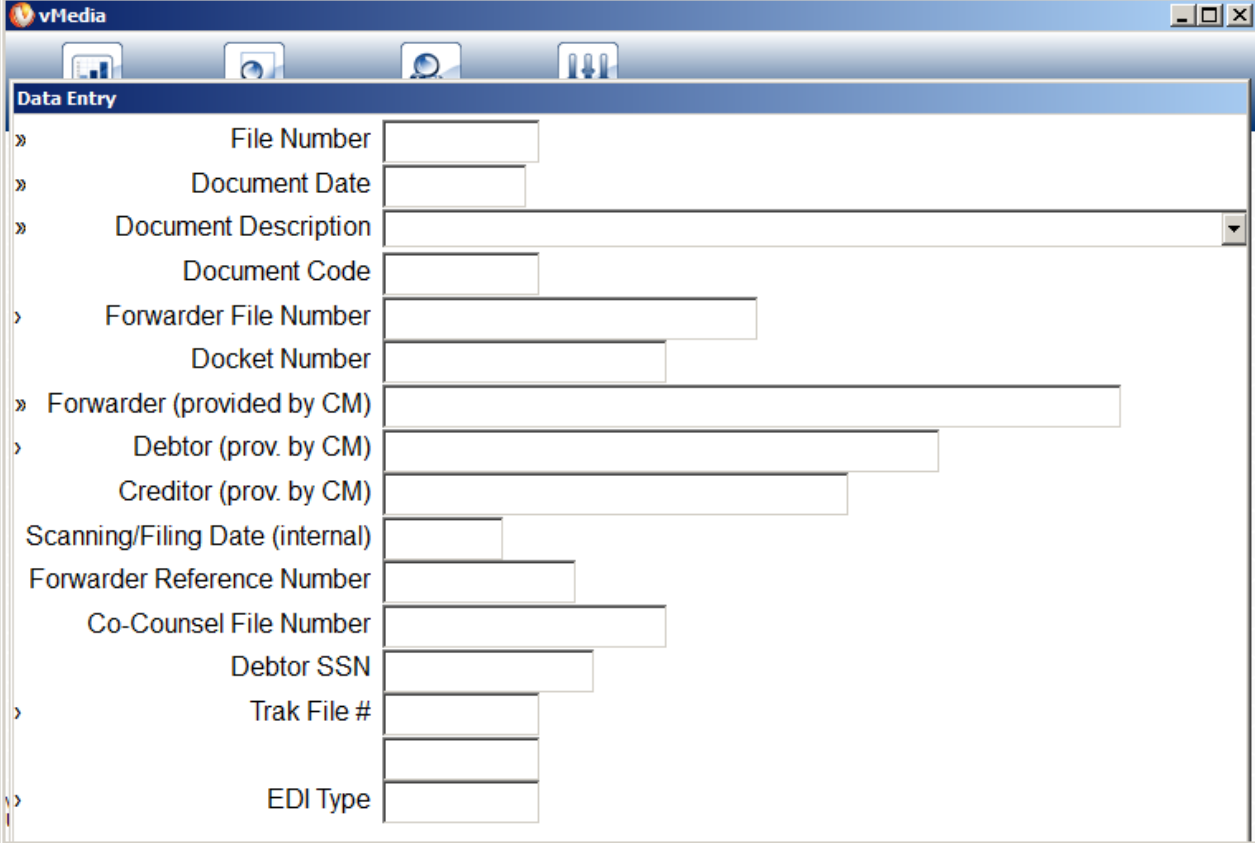Open the Viewing Module to search for and view Media

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
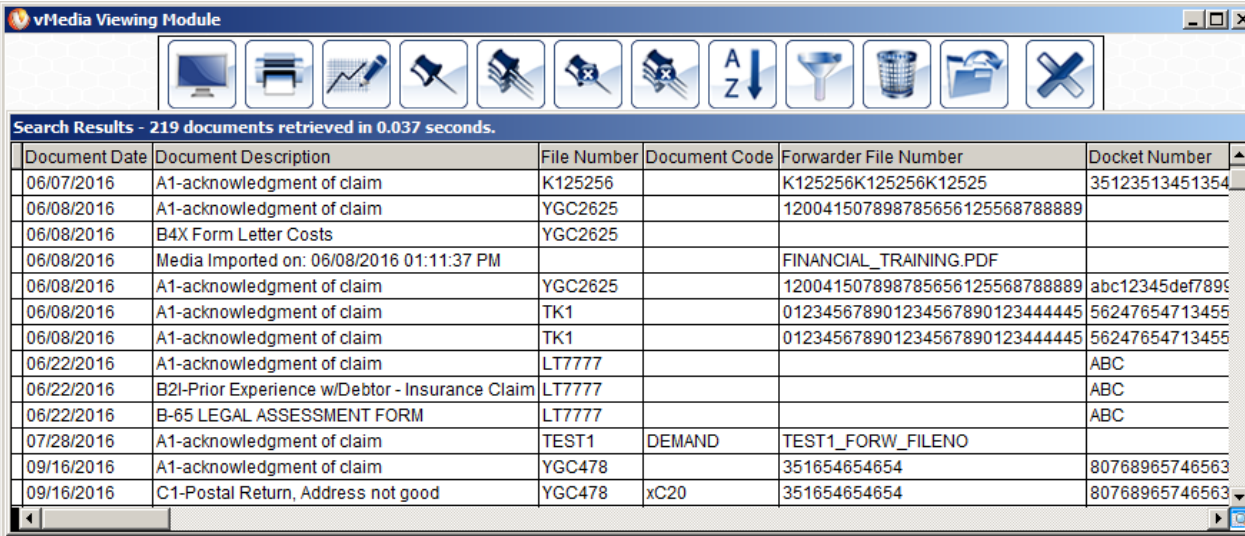
Working with Stored Electronic Media

- Search Results will appear

- Results can be sorted or filtered

- What you can do:
  - View
  - Print
  - Edit
  - Delete
  - Export

Spectrum Exporter

o Define path to export to

o Choose whether to create zip file

o Create your own expression using metadata

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Spectrum Exporter

o Combine, export individually, or convert

o Filter which documents to export

Send to vMedia

o Store any type of media supported by Windows.

o **Send to vMedia** icon.

o File will open in the default program.

Enable "Send To" option

o Open send to vMedia, click on gear :

o Select "Enable vMedia in the Send To Context Menu"
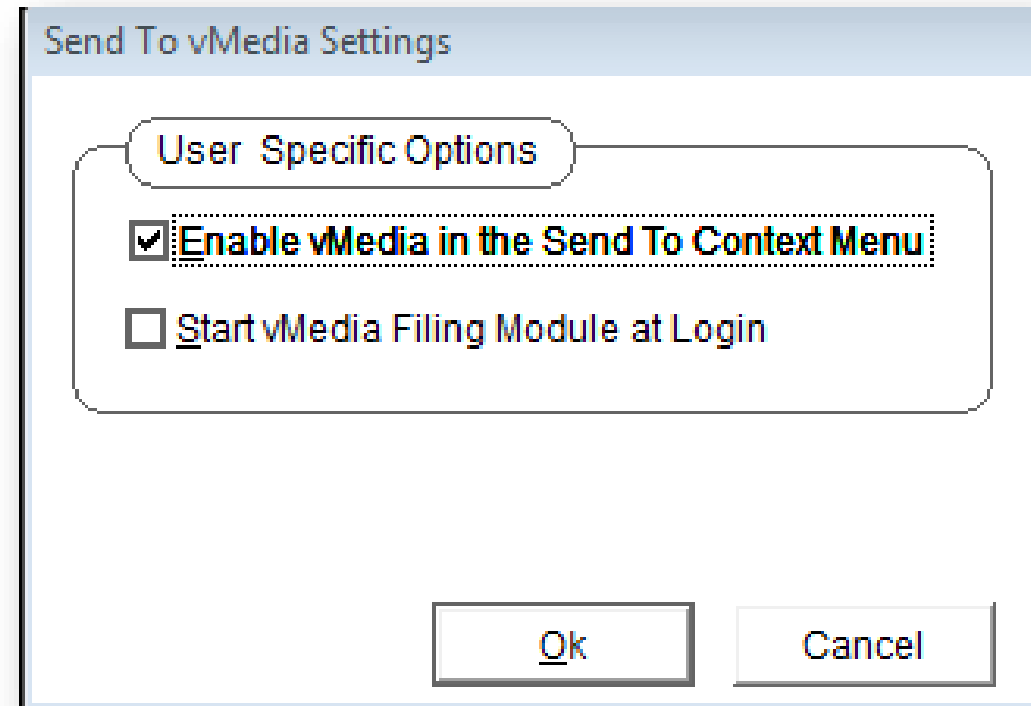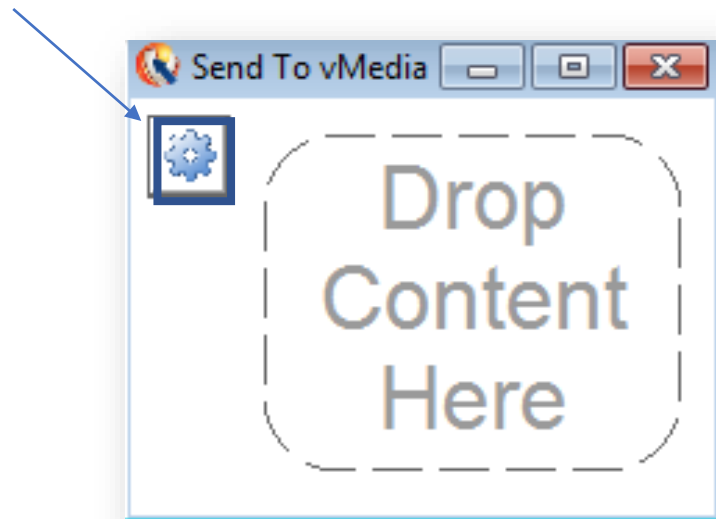
Using Send to vMedia

o Two methods to save files to vMedia
- Drag-and-drop
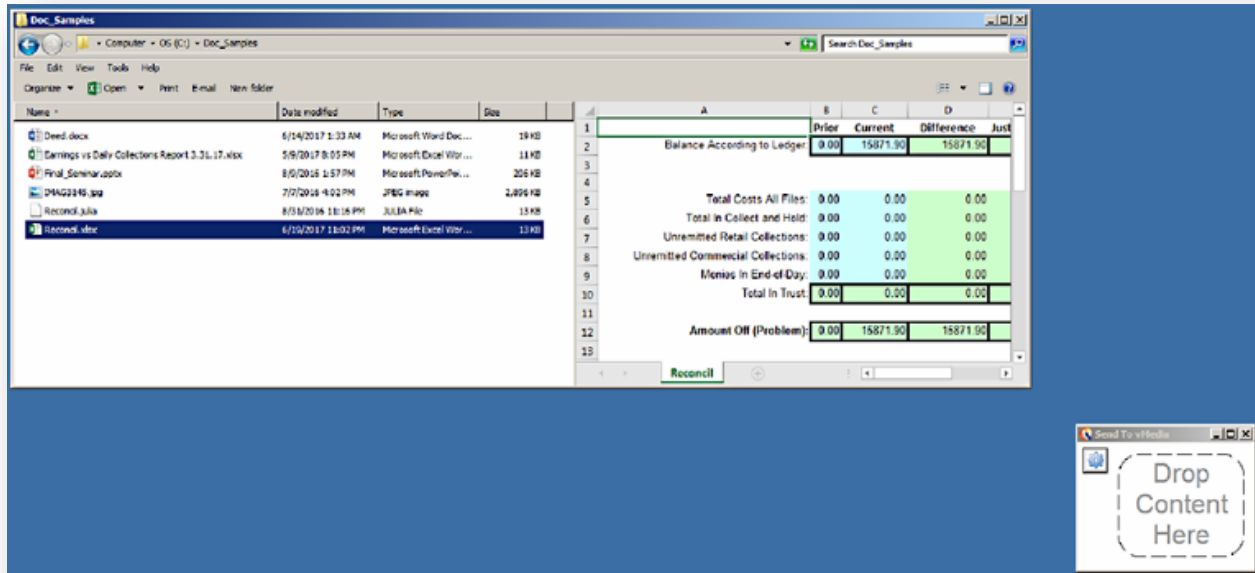
o Via the right-click context menu
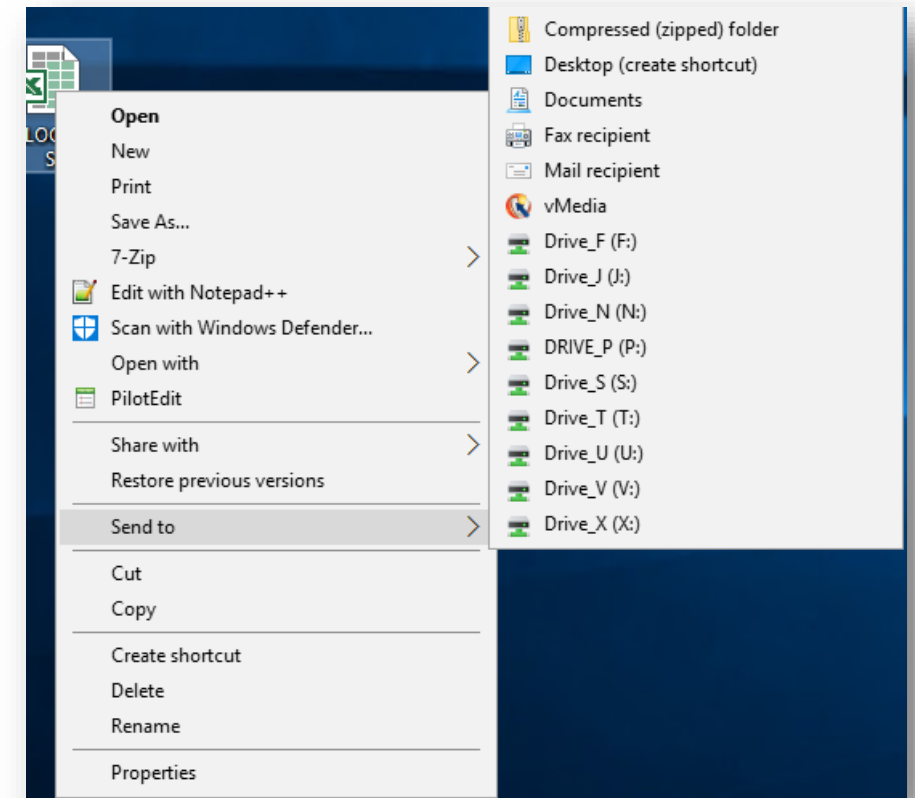
Send to vMedia

- The filing window will appear:

- Conflict Resolution:

Print to vMedia

o Appears as a virtual printer in Microsoft Windows.

o Any application that can print to a Windows printer can utilize Print to vMedia.

o Converts the paper document into an electronic file.
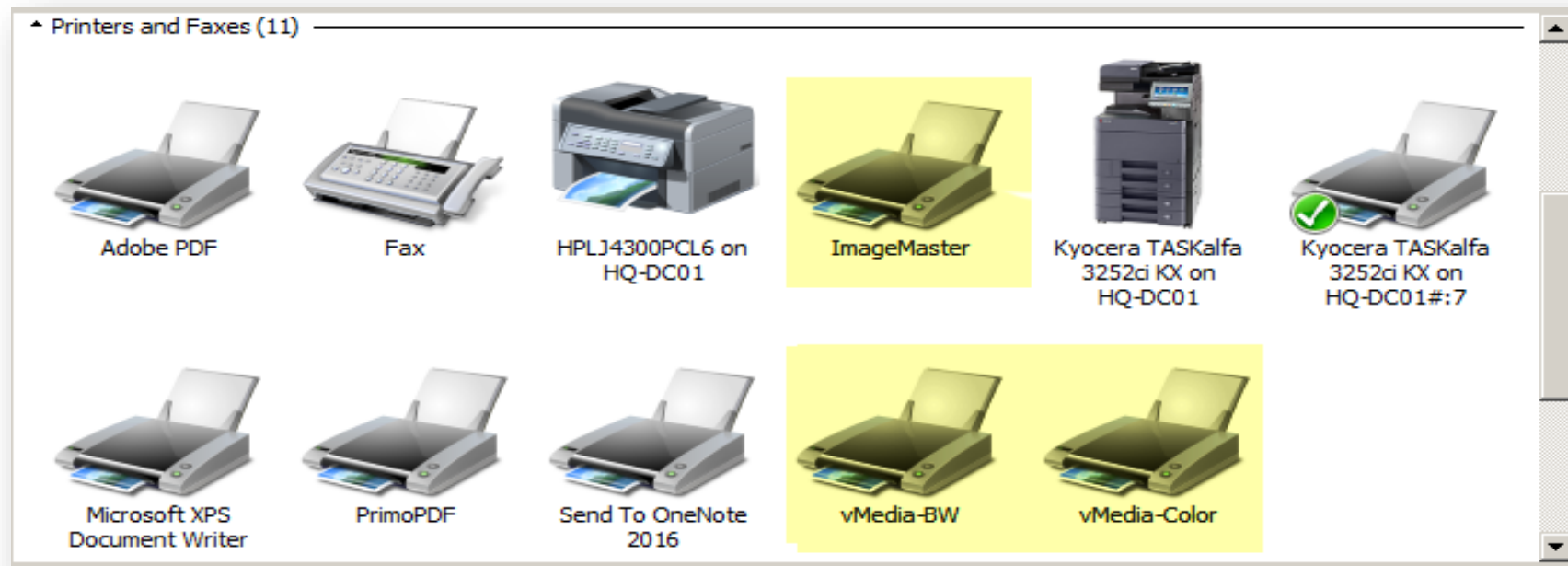
How To Use Print To vMedia

o Ability to choose vMedia printer from most Windows-based applications.

o Choose the desired database.

o Windows will keep printer in memory.

o Automatically select user's default database.

Spectrum Importer

o vMedia SQL is required

o Files must be in at least one subfolder of the base import path

Import/Export Module

Bulk Document Import

Note: Bulk document import types 1-3 have been deprecated.

4. vParser

5. Spectrum

6. Frederick Hanna

7. Streaming Pages

8. future use

9. Media Importer

Spectrum Media Importer

This importer scans a folder structure for documents and imports them using index information from the file name and folder structure.

Select Profile: Ben

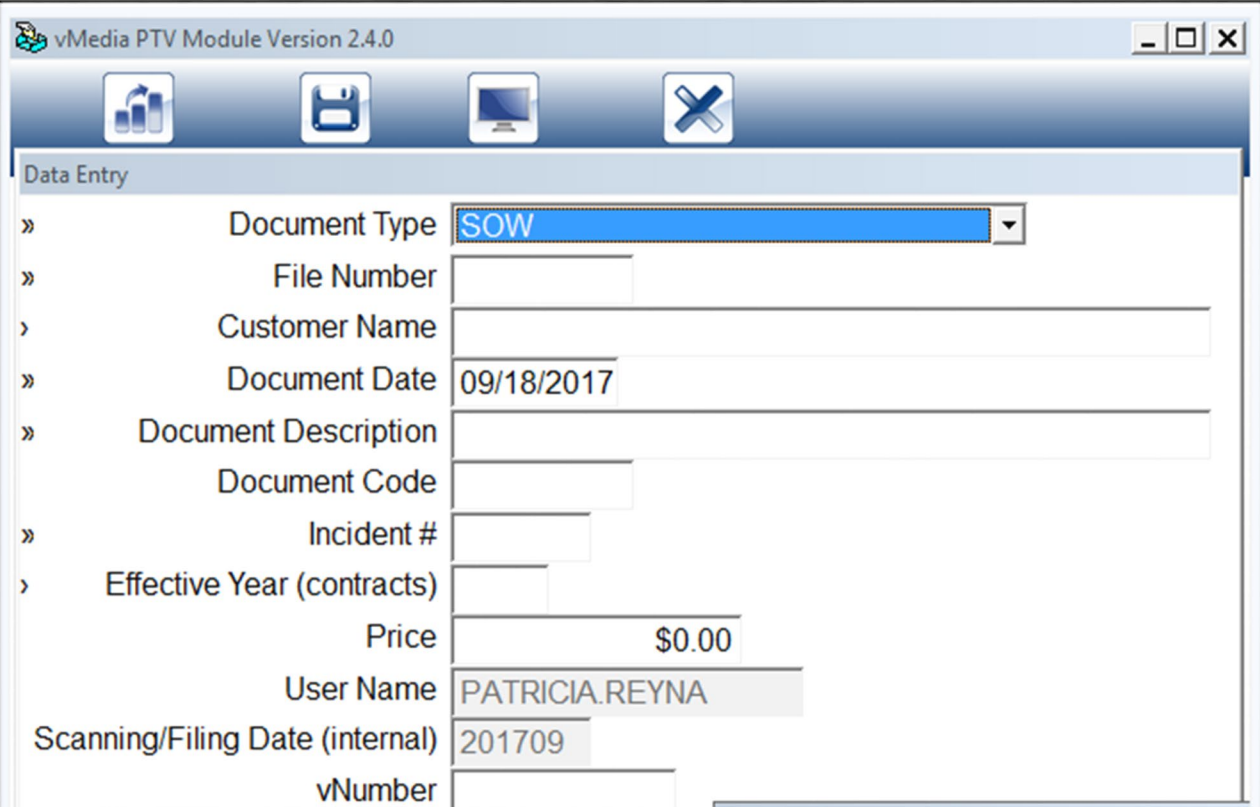Location of Files to Import

N:\USERS\BCAVALLARO\VMEDIA\

Destination Path:

F:\MASTER\IMAGES\CLS086\20220412\BCavallaro\17\

Source File Index Control

Output Control

Processing File:

Save Profile   Import Documents   Close

Spectrum Importer

o Subfolder name may be used for indexing

o Filename may be used for indexing

o Create your own custom expressions

Spectrum Importer

o Copy, move or transform files

o Decide what to do with files that don't match your validation criteria

o Define the destination file location and name
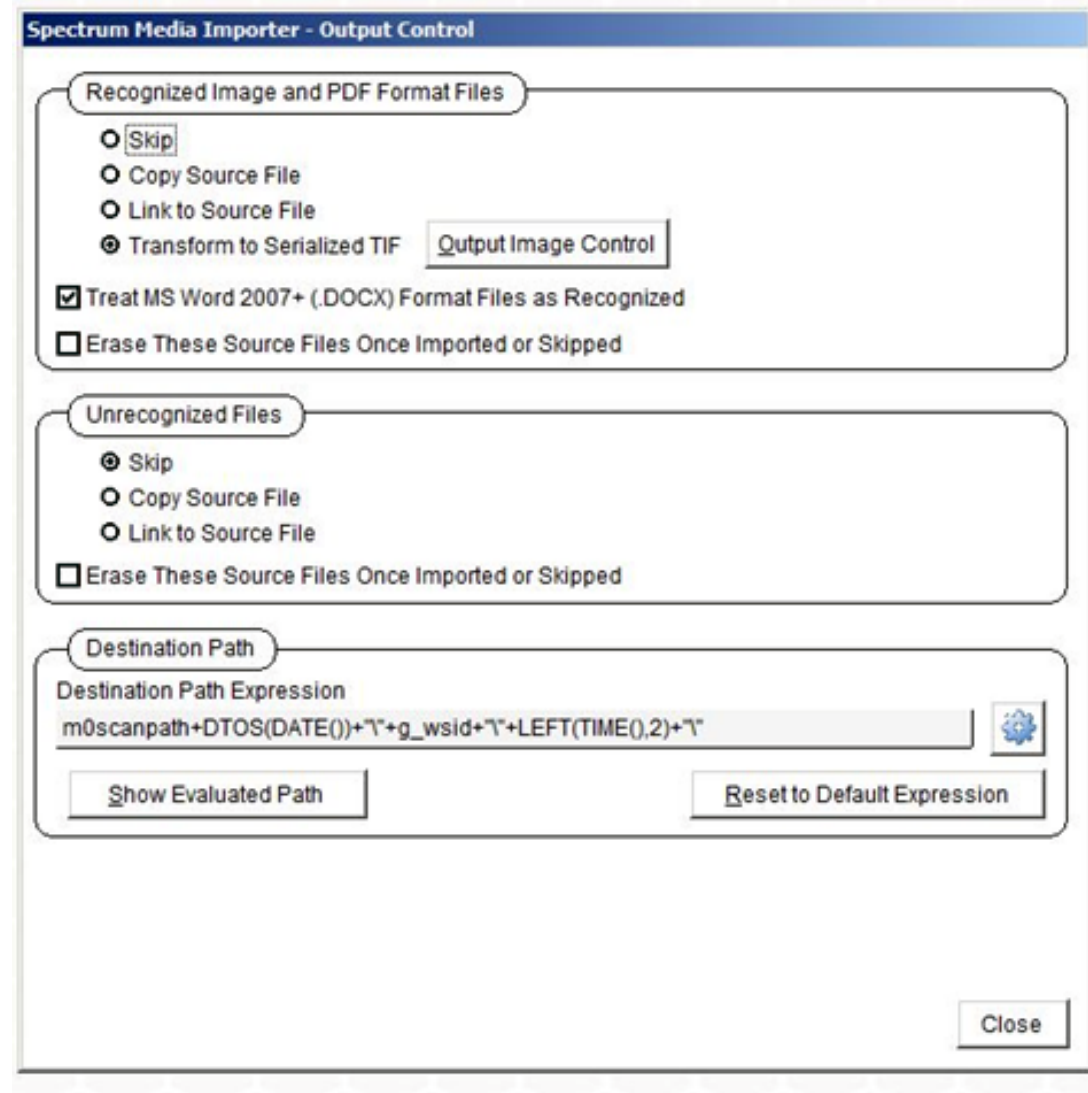
Spectrum Importer - Example

o I Create a folder C:\vmedia

o There is one folder inside that folder, vmtest

o There is one file inside that folder, TESTBEN.PDF

o I click Import Documents on the Spectrum Importer Screen

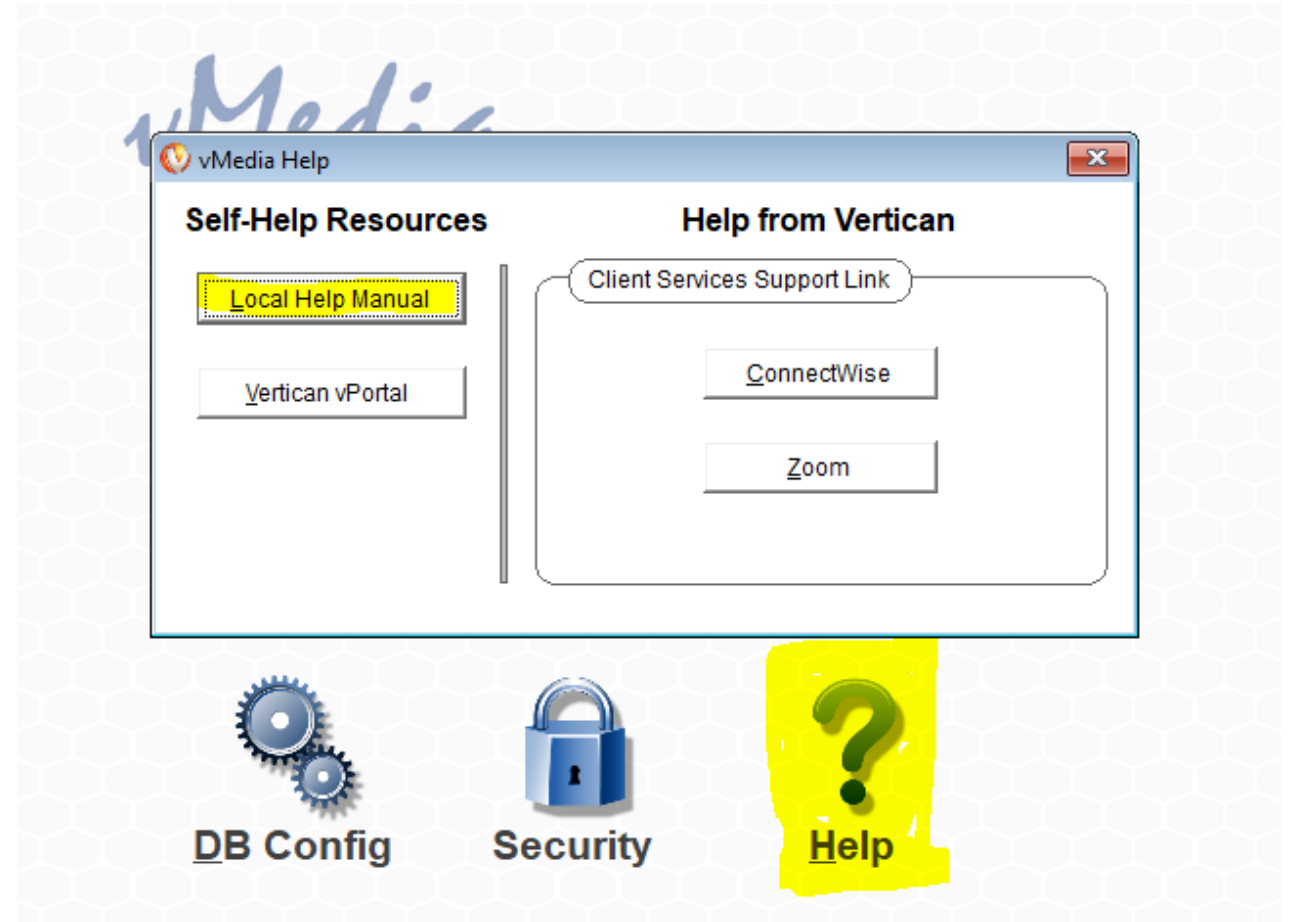o My document has been added to the database

Resources

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

vMedia 3.0

o Integration with Q-LawE documents section & Print to vMedia supported for Q-Law/Q-LawE

o Full support for SQL Server databases

o 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

o Better user access logs and ability to lock users out of vMedia to perform upgrades

o vDiagnostics program to help Vertican support find issues quicker

o Expanded lapsed license window to 28 days, after which you have 1 admin user forever

o Vertican In-App Marketing Messaging Service

Questions?

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