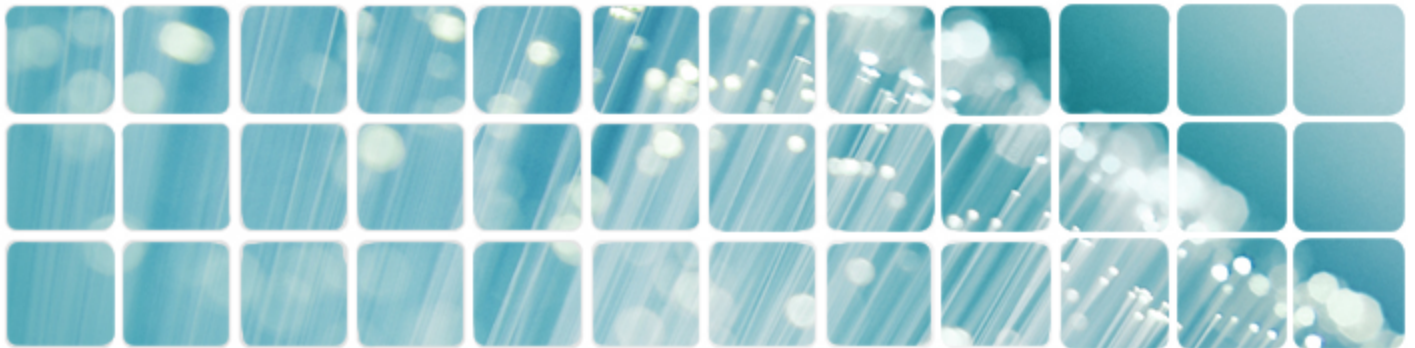


# CSG InView™ User's Guide

**Release Date: Release 2 2013**



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# Updated Information

CSG has updated this guide as follows for Release 2 2013.

## Customer Letters GUI and Operations Enhancements

| Topic                                  | Description                                                                                                                                                                      |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Run an Advanced Search</a> | <ul style="list-style-type: none"><li>Added a <b>Folders</b> field to the <b>Advanced Search</b> pane.</li></ul>                                                                 |
| <a href="#">Run a Basic Search</a>     | <ul style="list-style-type: none"><li>Added a <b>Document Type</b> field to the <b>Basic Search</b> pane, which allows you to search for letters, statements, or both.</li></ul> |

## Enhance InView Product Features

| Topic                                  | Description                                                                                                                        |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Create a Hold</a>          | <ul style="list-style-type: none"><li>Added a <b>Dynamic Hold</b> check box on the <a href="#">Hold Management</a> pane.</li></ul> |
| <a href="#">Selected Criteria Pane</a> | <ul style="list-style-type: none"><li>Added the <b>Selected Criteria</b> pane.</li></ul>                                           |

# Document Conventions

This guide uses the following typographical conventions to help you distinguish different types of information.

**Figure 1. Table of Document Conventions**

| Item                                                                  | How Item Appears                                                                            | Examples                                                                                                                                                                     |
|-----------------------------------------------------------------------|---------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Names of keyboard keys, including function keys                       | All capital letters.                                                                        | the TAB key<br>the DELETE key<br>the F3 key                                                                                                                                  |
| Names of buttons, fields, windows, screens, and other online elements | Bold, with capitalization matching the online element.                                      | the <b>Account Information</b> window<br>the <b>Monthly Rate</b> field<br>the <b>Edit Memo</b> dialog box<br>the <b>OK</b> button                                            |
| Acronyms and glossary terms                                           | Click the term to view the definition. This functionality appears only in the HTML version. | UDF                                                                                                                                                                          |
| Words defined in running text; words used for emphasis.               | Italicized.                                                                                 | <i>Reference pages</i> are pages that contain frequently used objects.<br>You <i>must</i> enter your ID before entering your password.                                       |
| Document titles                                                       | Italicized.                                                                                 | <i>CSG Business Parameters Guide</i>                                                                                                                                         |
| Variable                                                              | The variable is surrounded by angle brackets.                                               | For clients using CSG's Message Manager to activate correlation IDs, insert the following: Corrid=< <b>123456</b> >, where < <b>123456</b> > represents your correlation ID. |
| XML requests and responses                                            | Capitalization matches the actual XML request or response element name.                     | UpdatePredictionInteraction<br>AddPredictionInteractionResponse                                                                                                              |
| Table and column names                                                | Capitalization matches the actual table and column names.                                   | SBB_BASE<br>NUM_TO_ITEMS                                                                                                                                                     |

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# 1. InView

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## InView Overview

CSG InView is an enhanced archive solution that provides a single data repository for short- and long-term document archival. InView consists of a hosted Web application that electronically stores, retrieves, and prints documents exactly as they appear to your customers. The application replaces the former CD-ROM process. InView incorporates numerous features, including enhanced search capabilities at the document level, document downloading in .zip file or consolidated PDF format, and extended document retention.

## System Requirements

InView requires you to have access to a computer with the following minimum requirements:

- Internet access
- Microsoft Internet Explorer 5.5 or later; however, currently InView does not support Internet Explorer 10
- Adobe's Acrobat Reader 4.0 or later

## Security

Inview shares the DirectNet security policy, which is as follows.

DirectNet is a customer-service and administrative tool that provides CSG clients Web access to OSC data and reports to track production jobs from print through delivery to the USPS. At CSG, we understand the importance of client security. Protecting your confidential information is our number one priority. CSG maintains strict security standards designed to ensure a secure exchange of information with our clients.

The physical infrastructure is constructed with an industry standard, two-tier, De-Militarized Zone (DMZ) infrastructure as follows:

- A firewall restricts Internet access to allow only SSL traffic to authorized resources in CSG's DMZ.
- CSG's DMZ is a separate network from CSG's internal production network. CSG has established the following criteria to provide two major exclusions from this network:
  - CSG allows no business logic or personal consumer data for CSG applications to be permanently stored on any device in this DMZ network.
  - CSG carefully screens connections from devices on the DMZ network that communicate to devices on CSG's internal production network.
- CSG encrypts all transactions between the client's Internet browser and DirectNet with 128 bit encryption and SSL using Verisign Global Server IDs to prevent unauthorized access of sensitive information.

**Note:** You can request additional data about configuration of these devices and adherence to vendor recommendations. For security precautions, CSG withholds this information from this document.

If you have further security questions, please contact the SSC.

## Request an Internal InView User Account

The following information to request an internal InView user account is for Internal CSG users only. If you are an internal user, contact your CSG representative to obtain user access and [user account approval](#).

To use InView, you must have DirectNet access. Register a user account by creating a PRO request using the **DirectNet User Request** form.

After you submit the completed **DirectNet User Request** form, it goes through a single-stage approval process.

The request is approved, disapproved, or returned to requestor. An email is generated notifying the requestor of the current status as follows:

- **Approve** = Sends an email to the next person or group in the approval process
- **Disapprove** = Cancels the request and removes the request from all work queues; generates an email to the requestor
- **Return to Requestor** = Changes the status to **Draft** and sends an email to the requestor

1. Log onto PRO.
2. Open the **Create** menu, and click **Online Forms > Access or Security Authorization** to open the **All Forms** page.
3. Click **DirectNet User Request** to open the **DirectNet User Request** form.



4. Select the applicable user type. The **User Information** area appears. You can add up to 20 users. If there are more than 20 users, attach an addendum or submit an additional **DirectNet User Request** form.
5. Click **Add Access Rights to List** to open a dialog box containing options to set the access rights.
6. Complete the form, and click **Submit**.

Figure 2. DirectNet User Request Form

DirectNet User Request

Submit an ITSM ticket to reactivate an Inactive User.  
Allow 3 business days for your request to be completed.

REQUEST INFORMATION

Please contact Bob Deming at 402-964-1494 for details on usage of this form.

Create Date: 5/10/2013

Last Submit Date:

Request #:

Form Status: **Draft**

Submitted By: Kristin Gill

Form #:

Originated By:

Submitter Phone: 402-963-8360

Originator Phone:

User Type:

☐ Internal ☐ External

DIRECTNET INFORMATION

Action:

☐ New User ☐ Add Access (Existing User) ☐ Remove User ☐ Remove Access (Existing User)

Requested Impl. Date:

Environments:

☐ CAT ☐ Production ☐ Test

Instances:

☐ All ☐ FLA3 ☐ SPC4 ☐ SPC8 ☐ SPCQ ☐ STG2

☐ Florida ☐ SPC1 ☐ SPC5 ☐ SPC9 ☐ SPCX ☐ STG3

☐ Omaha ☐ SPC2 ☐ SPC5|FLA2 ☐ SPCH ☐ SPCY ☐ TEX2

☐ Texas ☐ SPC3 ☐ SPC6 ☐ SPCK ☐ STG1 ☐ TEX3

☐ FLA2 ☐ SPC3|FLA2 ☐ SPC7 ☐ SPCM

The "All" Database Instance is a combined Instance of production databases and will not provide access to each individual instance, these must be selected seperately.

Access Rights:

[Add Access Rights to List](#)

Folders/SysPrin:

Only the Folder(s) is required for Internal Users requiring Production Statements access

Text Replacement System:

Entry Level:

☐ Corporate  
☐ System  
☐ Principle  
☐ Agent  
☒ None

Access Level:

☐ Category View  
☐ Entity View  
☐ TRS Approval  
☐ TRS Copy  
☐ TRS Entry

ADDENDA (THERE IS A 50 MB SIZE LIMIT FOR THE ENTIRE FORM)

There are no Addenda to display.

Creator

Create Date

Type

Attachment

Add Addendum

Help

SIGNATURES

This form must be approved by the following people or groups before the requested action can be implemented.

System Generated (Employee listed in 'Approve By' field)

Detailed Signature History

Date

Action

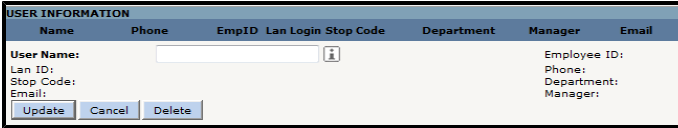
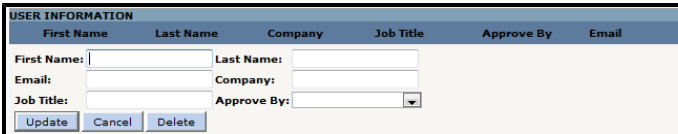
Signer

Signed For

Please complete this form and then click the submit button. The user will be notified by email to acknowledge their understanding of the responsibilities and obligations required of them.

Submit

**Figure 3. DirectNet User Request Form Item Descriptions**

| Item                 | Required | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Submitted By</b>  |          | Shows the name of the person submitting the form. This field automatically populates with the name of the user who is logged onto PRO. By resting your pointer on the information icon, detailed information about the person appears in a pop-up box.                                                                                                                                                                                                                                                                                                                                                        |
| <b>Originated By</b> |          | Shows the name of the person originating the request.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>User Type</b>     |          | <p>Shows the type of user requesting the form. Valid values are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Internal</b></li> <li>• <b>External</b></li> </ul> <p><b>Note:</b> Selecting <b>Internal</b> or <b>External</b> determines what fields are available in the <b>User Information</b> area. This area appears when you select user type.</p> <p>Figure 4. Internal User</p>  <p>Figure 5. External User</p>  |

| User Information - Internal |  |                                                                                                                                                                                               |
|-----------------------------|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>User Name</b>            |  | Shows the name of the person requesting DirectNet access. External users are required to enter the following fields: <b>First Name, Last Name, Email, Company, Job Title, and Approve By.</b> |
| <b>User Phone</b>           |  | Shows the requestor's phone number.                                                                                                                                                           |
| <b>Employee ID</b>          |  | Shows the requestor's employee ID number. This field automatically populates when the user name is entered.                                                                                   |
| <b>LAN ID</b>               |  | Shows the requestor's LAN ID. This field automatically populates when the user name is entered.                                                                                               |

| Item                               | Required | Description                                                                                                                                                                                                                   |
|------------------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Stop Code</b>                   |          | Shows the requestor's stop code. This field automatically populates when the user name is entered.                                                                                                                            |
| <b>Department</b>                  |          | Shows the department with which the requestor is associated. This field automatically populates when the user name is entered.                                                                                                |
| <b>Email</b>                       |          | Shows the requestor's email address. This field automatically populates when the user name is entered.                                                                                                                        |
| <b>Manager</b>                     |          | Shows the name of the requestor's manager. This field automatically populates when the user name is entered.                                                                                                                  |
| <b>User Information - External</b> |          |                                                                                                                                                                                                                               |
| <b>First Name</b>                  |          | Identifies the user's first name.                                                                                                                                                                                             |
| <b>Last Name</b>                   |          | Identifies the user's last name.                                                                                                                                                                                              |
| <b>Email</b>                       |          | Identifies the user's email address.                                                                                                                                                                                          |
| <b>Company</b>                     |          | Identifies the user's company name.                                                                                                                                                                                           |
| <b>Job Title</b>                   |          | Identifies the user's job title.                                                                                                                                                                                              |
| <b>Approve By</b>                  |          | Identifies the approver.                                                                                                                                                                                                      |
|                                    |          |                                                                                                                                                                                                                               |
| <b>Action</b>                      |          | <p>Determines what action is being requested. Valid values are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Add New User</b></li> <li>• <b>Add/Change Access/User</b></li> <li>• <b>Remove User</b></li> </ul> |
| <b>Requested Impl. Date</b>        | No       | Determines when the request is completed. Use this field only when the completion date is further than five days from the date of submission.                                                                                 |
| <b>Environments</b>                |          | Determines the environments to which the user has access.                                                                                                                                                                     |
| <b>Instances</b>                   |          | Determines the instances to which the user has access.                                                                                                                                                                        |

| Item                           | Required | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Access Rights</b>           |          | <p>Shows to which DirectNet applications the requestor wants access. The following are the four types of access:</p> <ul style="list-style-type: none"> <li>• Basic (InView Basic) - Allows you to search for and view statement images. It does not allow you to export statement images or perform extended holds.</li> <li>• Advanced (InView Advanced) - Allows you to search for and view statement images and export statement images. It does not allow you to perform extended holds.</li> <li>• Extended Hold (InView Extd Hold) - Allows you to search for and view statement images, export statement images, and execute extended holds on selected accounts.</li> </ul> <p><b>Note:</b> There is a cost associated to putting statements on extended hold.</p> <ul style="list-style-type: none"> <li>• Single Sign On (InView Statements) - This gives you access to Inview through DirectNet, which allows you to access the application through DirectNet.</li> </ul> |
| <b>Folders/Sys-Prin</b>        |          | Identifies the specific folders and Sys/Prins within checkers to which a user requires access. You must complete this field if you want access to the <b>Checkers Request View</b> , or the access request can be rejected.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Text Replacement System</b> | No       | Shows the text replacement system options. You can choose an entry level and an access level.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Addenda</b>                 |          | Use this area to attach an addendum if you want to request access for more than 20 users.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

## User Account Approval

Contact your CSG representative to obtain user access. Turnaround times vary based on variables such as the size of the request or resources available. However, CSG completes all change requests within five business days of receiving the approved request.

## Log On to InView

You request access to CSG InView from your CSG representative. After CSG grants you access, you receive your InView user ID and password credentials.

### TIPS

- You can access InView directly from DirectNet. You must specify that you want the *InView statements* access level through DirectNet when you request access to InView. To access InView through DirectNet, open DirectNet and select **Applications > Application Quick Links > InView Statements**.
  - Your InView password is the same as your DirectNet password. If you update your DirectNet password, it automatically updates your InView password and vice versa.
  - Click the **Logout** link that appears on the CSG home page to log off InView. InView logs you off automatically every 15 minutes.
1. Open Internet Explorer.
  2. Type the InView URL in the address bar to open the Log In pane.
  3. Type your user name and password.
  4. Click **Log In** to open the InView home page.

Figure 6. InView Home Page

CSG InView<sup>SM</sup>  
INTERNATIONAL

Welcome Kristin! (INV2) [Logout](#) [My Preferences](#)

▼ Basic Search

Account Number:  
Equals

Cycle Date Range:  
Beginning: 04/06/2013  
Ending: 04/13/2013

Phone Numbers:

Selection

► Address Search

► Advanced Search

OK Clear

Hold Management

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[Terms & Conditions](#) | [Contact Us](#) | [Help](#)

**Figure 7. InView Home Page Item Descriptions**

| Item                 | Description                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Header Links</b>  | Use the links on any page's header to log off InView and view your account's preferences.                                                                                                                                                                                                                                                                                                                                                        |
| <b>Selection Tab</b> | <p>Click this tab to open or hide the following search panes:</p> <ul style="list-style-type: none"><li>• <a href="#">Basic Search</a></li><li>• <a href="#">Address Search</a></li><li>• <a href="#">Advanced Search</a></li></ul> <p>The <b>Hold Management</b> button appears on the <b>Selection</b> tab only if you have <a href="#">extended hold</a> user access rights, which give you the ability to <a href="#">create a hold</a>.</p> |
| <b>Footer Links</b>  | Use the links on any page's footer to access helpful information and to contact CSG.                                                                                                                                                                                                                                                                                                                                                             |

## Forgot Your Password

Complete the following steps if you forget your password.

1. [Access the InView application](#).
2. Click the **Forgot Password** link on the Log In pane to open the **Forgot Password** pane.
3. Type your user name or email address.
4. Click **Submit**; the following message appears: **Thank you. An email will be sent containing your password within the next few minutes.**
5. Click **Ok** to close the message and return to the Log In pane.
6. Open the email that contains your password and the following message: **This is a system-generated message. Please do not respond. Your DirectNet password is: <password>.**
7. Return to InView, and type your user name and password.

Figure 8. Forgot Password Pane

A red rectangular panel with rounded corners and a thin white border. At the top left, the text "Forgot Password" is displayed in white, with "Forgot Password" repeated in a smaller, lighter font below it. To the right is the "CSG INTERNATIONAL" logo in white. The main text in the center reads: "We will email your password to the email address we have on record. Enter your username or email address in the area provided below and press the Submit button." Below this text are two input fields. The first is labeled "Username:" and the second is labeled "Email Address:". Between these two fields is the word "Or". At the bottom right of the panel are two buttons: "Submit" and "Cancel", both with a gradient and a slight shadow.

## Change Your Password

There are three times when you need to change your password:

- When you log on to Inview or DirectNet for the first time (they share the same password)
- When your password expires
- When you want to change your password

Rules for creating passwords are as follows:

- You must change your password every 60 days.
- Passwords must be a minimum of 8 characters in length. At least 1 character must be a numeric character and at least 3 characters must be alpha characters.
- Special characters and blanks are allowed.
- You cannot use your user ID as your password.
- You cannot use your user ID reversed as your password.

Complete the following steps to change a password.

1. Click **My Preferences** to open the [My Preferences](#) pane.
2. Type your old password.
3. Type your new password.
4. Type your new password again to confirm it.
5. Click **Save**.

Figure 9. Change Password Pane

A red dialog box titled "Change Password" with the CSG International logo. It contains three input fields: "Old Password:", "New Password:", and "Confirm New Password:". At the bottom are "Save" and "Cancel" buttons.

Change Password CSG INTERNATIONAL

Old Password:

New Password:

Confirm New Password:

Save Cancel

## My Preferences Pane

Use this pane to view your user preferences, including access level, and to [change your password](#).

Figure 10. My Preferences Pane

A red dialog box titled "My Preferences" with the CSG International logo. It displays user information: "First Name: Kristin", "Last Name: Gill", and "All Customers Available". It also shows "Access Level: Extd Hold", "Rows per Page: 25" (with a dropdown arrow), and "Instance: INV2" (with a dropdown arrow). At the bottom are a link for "Change Password" and a "Close" button.

My Preferences CSG INTERNATIONAL

First Name: Kristin

Last Name: Gill

All Customers Available

Access Level: Extd Hold

Rows per Page: 25 ▼

Instance: INV2 ▼

[Change Password](#) Close

Figure 11. My Preferences Pane Item Descriptions

| Item       | Description               |
|------------|---------------------------|
| First Name | Contains your first name. |
| Last Name  | Contains your last name.  |






| Item                   | Description                                                                        |
|------------------------|------------------------------------------------------------------------------------|
| <b>Access Level</b>    | Identifies your access level.                                                      |
| <b>Rows per Page</b>   | Identifies the amount of rows per page you see in <a href="#">search results</a> . |
| <b>Instance</b>        | Identifies the instance of InView you see.                                         |
| <b>Change Password</b> | Click this link to <a href="#">change your password</a> .                          |
| <b>Close</b>           | Click this button to close the pane.                                               |

## User Access Levels

There are three levels of user access available in CSG InView: basic, advanced and extended hold.

If you have multiple security levels defined to you, InView always uses privileges and access tied to the highest security level.

**Figure 12. User Access Levels**

| User Level | Description                                                                                                                                             | Export Access                                                                                                                                                                                   | Hold Management Access |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Basic      | This level allows you to search and display statement images. It does not allow you to export statement images or perform extended holds.               | Access to export <a href="#">search results</a> in Excel, Word, and CSV.<br>                                | No                     |
| Advanced   | This level allows you to search and display statement images and export statement images. It does not allow you to perform extended holds.              | Access to save as a zip file, merge selected items into a PDF file, and export in Excel, Word, and CSV.<br> | No                     |
| Extd Hold  | (Extended Hold) This level allows you to search and display statement images, export statement images, and execute extended holds on selected accounts. | Access to save as a zip file, merge selected items into a PDF file, and export in Excel, Word, and CSV.<br> | <a href="#">Yes</a>    |

## 2. Search Functionality

This chapter contains the following sections:

|                                     |    |
|-------------------------------------|----|
| Search Functionality Overview ..... | 12 |
| Sequential Searches .....           | 13 |
| Run a Basic Search .....            | 13 |
| Run an Address Search .....         | 14 |
| Run an Advanced Search .....        | 15 |
| Search Results .....                | 17 |
| Export Data .....                   | 19 |
| Advanced Export Data Options .....  | 20 |

### Search Functionality Overview

CSG InView provides you the following three types of document searches:

- [Basic](#)
- [Address](#)
- [Advanced](#)

These search panes work together to perform a *sequential search*; **OK** and **Clear** buttons appear at the bottom of each search pane. Click **OK** to submit a search, and click **Clear** to clear the search criteria. A [Hold Management](#) button can also appear, based on your [user access level](#).

Figure 13. Search Panes

The screenshot shows a software interface with a red background. At the top, there are three tabs: 'Basic Search' (selected), 'Address Search', and 'Advanced Search'. Below the tabs, there is a 'Legal/Extd Hold:' dropdown menu. Underneath that is a 'Sys Print:' label followed by a list box containing the following items: 1000-0100, 1000-0200, 1000-0700, 1000-1900, 1000-2000, 1000-2100, and 1000-2200. At the bottom of the interface, there are three buttons: 'OK', 'Clear', and 'Hold Management'.

## Sequential Searches

CSG InView lets you perform a series of searches to identify the desired accounts. For example, if you want to locate accounts from a specific cycle date located in a specific postal code, you run a basic search to generate a list of accounts for the specific cycle date. Then you run an address search using the postal code to identify those accounts within the selected cycle. After you set criteria for both searches, the data grid displays only accounts from the desired cycle date and postal code.

## Run a Basic Search

A basic search allows you to search for documents and images based on an account number, cycle date, and phone number.

### TIPS

- You can use one or more search types to run a [sequential search](#). To perform a search like this, enter information into any combination of search fields on any of the search panes, and click **OK** to view searches matching all set criteria.
1. [Log on to InView](#), and click the **Basic Search** pane to view the basic search fields.
  2. Complete the fields as described in the following table.
  3. Click **OK** to view your [search results](#).

Figure 14. Basic Search Pane

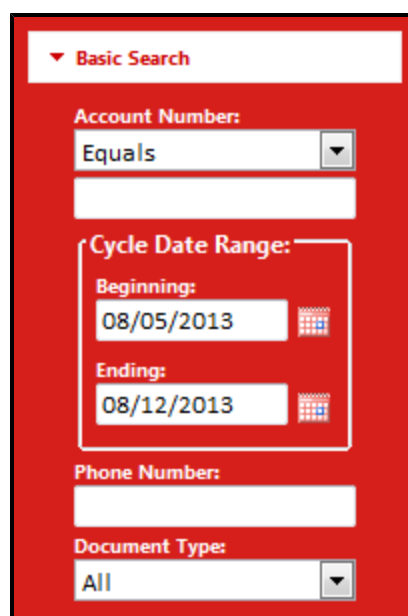
The image shows a 'Basic Search' pane with a red header. It contains several search fields: 'Account Number' with a dropdown menu set to 'Equals' and an empty text box below it; 'Cycle Date Range' with 'Beginning' and 'Ending' date pickers (showing 08/05/2013 and 08/12/2013 respectively); 'Phone Number' with an empty text box; and 'Document Type' with a dropdown menu set to 'All'.

Figure 15. Basic Search Pane Item Descriptions

| Item           | Description                                                                                                                                                                              |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account Number | Contains account number information. You can search for partial account numbers based on the beginning, ending, or portion of the number using the <b>Account Number</b> Qualifier list. |
| Beginning      | Identifies the beginning date of the cycle date range by which you want to search.                                                                                                       |
| Ending         | Identifies the ending date of the cycle date range by which you want to search.                                                                                                          |
| Phone Number   | Contains the phone number.                                                                                                                                                               |
| Document Type  | Contains the document type. This field allows you to search for letters, statements, or both. The default value is <b>All</b> .                                                          |

## Run an Address Search

An address search allows you to search for documents and images based on the account name and address, including the street, city, state, and postal code. You can enter data in any combination of the search fields.

### TIPS

- You can use one or more search types to run a [sequential search](#). To perform a search like this, enter information into any combination of search fields on any of the search panes, and click **OK** to view searches matching all set criteria.

1. [Log on to InView](#), and click the **Address Search** pane to view the address search fields.
2. Complete the fields as described in the following table.
3. Click **OK** to view your [search results](#).

Figure 16. Address Search Pane



Figure 17. Address Search Pane Item Descriptions

| Item            | Description                                                                                                                                                |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>     | Contains a client name. This field searches for any part of the name you enter. For example, if you type “john,” the search results bring back Johnston.   |
| <b>Address</b>  | Contains address information. You can search by partial address based on the beginning, ending, or portion of the address using the Qualifier list.        |
| <b>City</b>     | Contains city information. You can search by partial city name based on the beginning, ending, or portion of the name using the Qualifier list.            |
| <b>State</b>    | Contains the state name.                                                                                                                                   |
| <b>Zip Code</b> | Contains postal code information. You can search by partial postal code based on the beginning, ending, or portion of the number using the Qualifier list. |

## Run an Advanced Search

An advanced search allows you to search for documents and images based on a customer number (Sys/Prin) or accounts associated with a legal or extended [hold](#).

### TIPS

- You can use one or more search types to run a [sequential search](#). To perform a search like this, enter information into any combination of search fields on any of the search panes, and click **OK** to view searches matching all set criteria.
1. [Log on to InView](#), and click the **Advanced Search** pane to view the address search fields.
  2. Complete the fields as described in the following table.
  3. Click **OK** to view your [search results](#). You can [export your results](#) at this time.

Figure 18. Advanced Search Pane

The screenshot shows the 'Advanced Search' pane with a red header. It contains three search fields:

- Legal/Extd Hold:** A dropdown menu with a downward arrow.
- Sys Prin:** A list box containing the following values: 0001-0001, 1000-0030, 1000-0040, 1000-0100, 1000-0200, 1000-0700, 1000-0800, 1000-0900, 1000-1000, 1000-1100, 1000-1200, and 1000-1300.
- Folders:** A list box containing the following values: 1000PLTRS, 1000PLTRSCP5, 1000TLTRS, 1000TLTRSCP5, 12345678901234567, and 4000P0010.

Figure 19. Advanced Search Pane Item Descriptions

| Item                   | Description                                                                                                               |
|------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Legal/Extd Hold</b> | Contains the names of legal and extended holds by which you can search.                                                   |
| <b>Sys Prin</b>        | Contains a list of Sys/Prin numbers. Type a number into the <b>Sys Prin</b> field to go to a specific number in the list. |
| <b>Folders</b>         | Contains a list of folders you have security permissions to access. You can select one or more folders.                   |

## Search Results

When you [submit a search request](#), a list of accounts that meet your search criteria appears. Multiple columns of information appear in a grid format for each account.

### TIPS

















- You can sort data on the results grid by clicking the column headers.
- You can resize columns by clicking and dragging the column headers.
- Results appear in pages. The number of accounts per page can be adjusted from 25 to 100 on the **My Preferences** pane.
- Large-volume results are divided into groups of 10,000. To display the next or previous group of 10,000 accounts, click the **Prev** or **Next** button.
- The total number of accounts/pages in the results grid appears in the lower-right corner of the grid.
- You can filter the results grid to display accounts with specific attributes. Click the **Filter** icon  on any column where it is available, and select the filter type (**EqualTo**, **LessThan**, etc.). When you apply a filter, the results grid refreshes and displays only accounts that meet that specification. To remove a filter, click the **Filter** icon and select **NoFilter**.


Figure 20. Results

Drag a column header and drop it here to group by that column

| View                                                                                | Client                                                                              | Cycle Date                                                                          | Original Expiration Date                                                            | Extended Hold Date                                                                  | Account                                                                               | Phone                                                                                 | Subscriber                                                                            |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
|  |  |  |  |  |  |  |  |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000022                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 701<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000030                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 702<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000048                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 703<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000055                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 704<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000063                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 705<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000071                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 706<br>QUINCY, IL 62301293199                      |
|  | 80256000                                                                            | 4/8/2013                                                                            | 4/8/2018                                                                            |                                                                                     | 8025600070000089                                                                      | 2177777777                                                                            | TEST GUTHRIE<br>415 HAMPSHIRE ST # 707<br>QUINCY, IL 62301293199                      |
|                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                     |                                                                                       |                                                                                       | TEST GUTHRIE                                                                          |

1 2 3 4 5 6 7 8 9 10 ... Page size: 25 10000 items in 500 pages

Figure 21. Results Item Descriptions

| Item                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Export Options</b>           | <p>Identifies the options you have to export document images and results grid data. The options that are available are based on your <a href="#">user access level</a>. You <a href="#">can export selected document</a> images individually or grouped into a single PDF. You can export results grid data to an Excel, Word, or comma-delimited file. Valid values are as follows:</p> <ul style="list-style-type: none"> <li>• Zip</li> <li>• PDF</li> <li>• Excel</li> <li>• Word</li> <li>• CSV</li> </ul>                                                                                                                                                                                          |
| <b>Check Box</b>                | <p>Choose specific files to <a href="#">export to Zip or merged PDF files</a> or place on <a href="#">hold</a> by selecting the corresponding check boxes.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>View</b>                     | <p>Click this link to open the selected document to the right of your search results. When a document is open, you have the following formatting options:</p> <div style="text-align: center;">  </div> <ul style="list-style-type: none"> <li>• Expand/Contract = Click the <b>Expand/Contract</b> arrow icon to display or hide the open document.</li> <li>• Resize = You can resize an open document on your screen. Rest your pointer over the grid/image divider to change your pointer to a double-sided arrow. Press and hold the left mouse button and drag the divider to the desired position.</li> </ul> |
| <b>Client</b>                   | Identifies the client Sys/Prin.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Cycle Date</b>               | Identifies the cycle date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Original Expiration Date</b> | Identifies the original expiration date.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <b>Extended Hold Date</b>       | Identifies the extended hold date if a hold exists.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Account</b>                  | Contains the account number.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <b>Phone</b>                    | Contains the phone number.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <b>Subscriber</b>               | Contains client information including name and address.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |



## Export Data

You have permission to export selected document images into CSV, Excel, or Word documents, regardless of your [user access level](#). Advanced and extended hold users have the [additional functionality to export](#) selected document images into a Zip file or combined PDF file.

### TIPS

- You cannot use the check box to select specific account data to export with CSV, Excel, or Word exports. The system exports all results data on the grid.

### Export Results to a CSV File

Complete the following steps to export your [search results](#) to a CSV file.

### TIPS

- Some of the fields can appear to truncate in the CSV file, but no information is missing. For example, if the account number is truncated, click in the cell you want to view to access the full number.
  - A CSV file contains the following columns: **View, Client, Cycle Date, Original Expiration Date, Extended Hold Date, Account, Phone, and Subscriber.**
1. [Run a search.](#)
  2. Click the **CSV** icon on the results pane; a **File Download** dialog box appears asking whether you want to open or save the file.
  3. Click **Open** to open the CSV file.

### Export Results to an Excel File

Complete the following steps to export your [search results](#) to an Excel file.

### TIPS

- Some of the fields can appear to truncate in the Excel file, but no information is missing. For example, if the account number is truncated, click in the cell you want to view to access the full number.
  - An Excel file contains the following columns: **FALSE, View, Client, Cycle Date, Original Expiration Date, Extended Hold Date, Account, Phone, and Subscriber.**
1. [Run a search.](#)
  2. Click the **Excel** icon on the results pane; a **File Download** dialog box appears asking whether you want to open or save the file.
  3. Click **Open** to open the Excel file.

### Export Results to a Word File

Complete the following steps to export your [search results](#) to a Word file.

### TIPS

- A Word file contains the following columns: **False, View, Client, Cycle Date, Original Expiration Date, Extended Hold Date, Account, Phone, and Subscriber.**
1. [Run a search.](#)
  2. Click the **Word** icon on the results pane; a **File Download** dialog box appears asking whether you want to open or save the file.
  3. Click **Open** to open the Word file.

Figure 22. Example Export - Word File

| False | View | Client   | Cycle Date | Original Expiration Date | Extended Hold Date | Account          | Phone      | Subscriber                                                                |
|-------|------|----------|------------|--------------------------|--------------------|------------------|------------|---------------------------------------------------------------------------|
| False |      | 80264000 | 4/12/2013  | 10/12/2017               |                    | 8026400090010401 | 7678687678 | FHGFHGFH JKL<br>3411 COMSTOCK AVE APT G105<br>BELLEVUE, NE 68123139411    |
| False |      | 80264000 | 4/12/2013  | 10/12/2017               |                    | 8026400090010427 | 4029638615 | LUNB02 LUNB02<br>2210 S 142ND CT APT 10<br>OMAHA, NE 68144226210          |
| False |      | 80264000 | 4/13/2013  | 10/13/2017               |                    | 8026400090010435 | 1111111111 | JHA JS<br>510 N FILLMORE ST # 787<br>PAPILLION, NE 68046435710            |
| False |      | 80264000 | 4/13/2013  | 10/13/2017               |                    | 8026400090010443 | 9009878097 | TR ASOS<br>13411 NICHOLAS ST # 3<br>OMAHA, NE 68154528411                 |
| False |      | 80264000 | 4/12/2013  | 10/12/2017               |                    | 8026400090010450 | 6483456665 | RENEW OFFER NON<br>3411 COMSTOCK AVE APT A117<br>BELLEVUE, NE 68123139411 |

## Advanced Export Data Options

[Advanced and extended hold users](#) have the additional functionality to export selected document images into a Zip file or combined PDF file.

### Export Results to a Zip File

Complete the following steps to export your [search results](#) to a Zip file.

#### TIPS

- The link (also known as a *claim ticket*) that CSG sends you in an email works only once. If you try to click it a second time, you get the following error message: **An error has occurred. Please sign into InView and resubmit your request.** If you want to save the files, you must save them to your hard drive the first time you open the Zip file.
1. [Run a search.](#)
  2. Select one or more check boxes for the accounts you want to export.

3. Click the **Zip File** icon on the results pane; the following message appears: **Your request is being processed. You will receive an email with instructions for downloading your Zip when processing is complete.**
4. Access your email, and click the link provided; a **File Download** dialog box appears asking whether you want to open or save the file.
5. Click **Open** to open the Zip file folder.
6. Click to open the individual PDF files.

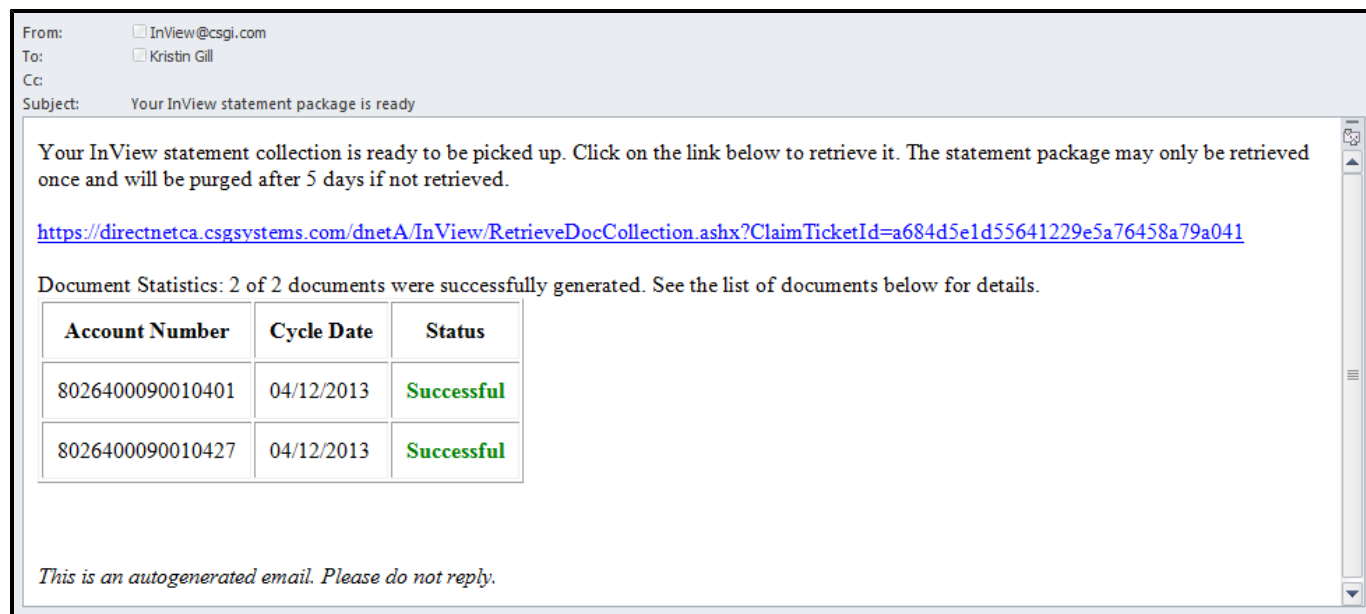
### Export Results to a Merged PDF File

Complete the following steps to export your [search results](#) to a merged PDF file.

#### TIPS

- The link (also known as a *claim ticket*) that CSG sends you in an email works only once. If you try to click it a second time, you get the following error message: **An error has occurred. Please sign into InView and resubmit your request.**
1. [Run a search.](#)
  2. Select one or more check boxes for the accounts you want to export.
  3. Click the **PDF** icon on the results pane; the following message appears: **Your request is being processed. You will receive an email with instructions for downloading your PDF when processing is complete.**
  4. Access your email, and click the link provided; a **File Download** dialog box appears asking whether you want to open or save the file.
  5. Click **Open** to open the PDF.

Figure 23. Email Example with Link



## 3. Holds Management

This chapter contains the following sections:

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| Create a Hold .....             | 22 |
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### Holds Management Overview

The retention period for documents stored in CSG InView is based on a contractual agreement with CSG. The retention period is typically five years. InView allows you to extend the retention period for selected documents. Expanding the retention period for selected documents is referred to as an *extended hold*. CSG triggers a billing counter when documents are placed on an extended hold. The system triggers additional billing counters based on the length of the extended hold. You must have [extended hold user access](#) to use holds management features.

### Create a Hold

Complete the following steps to create a hold.

#### TIPS

- A statement can exist in more than one hold. The statement remains on hold until the furthest future hold date associated with it.
1. Perform a [search](#).
  2. Select the accounts you want to put on hold.
  3. Click **Hold Management** to open the [Hold Management](#) pane.
  4. Select **Create New Hold** in the **Hold** field.
  5. Select **Add Selected Rows to Hold** to add the rows you selected to your new hold in the **Action** field.

6. Set a date when your hold expires in the **Retain Until** field. You can select a defined retention date or choose for the hold to be [permanent](#) or [dynamic](#).
7. Click **Apply**; you receive an email confirmation of the hold name, retention date, hold action (selected rows, entire set, etc.), and document count.

## Hold Management Pane

You use hold management functionality to [create](#), [update](#), and [delete](#) extended holds. You can view the accounts associated with an extended hold by using an [advanced search](#).

**Figure 24. Hold Management Pane**

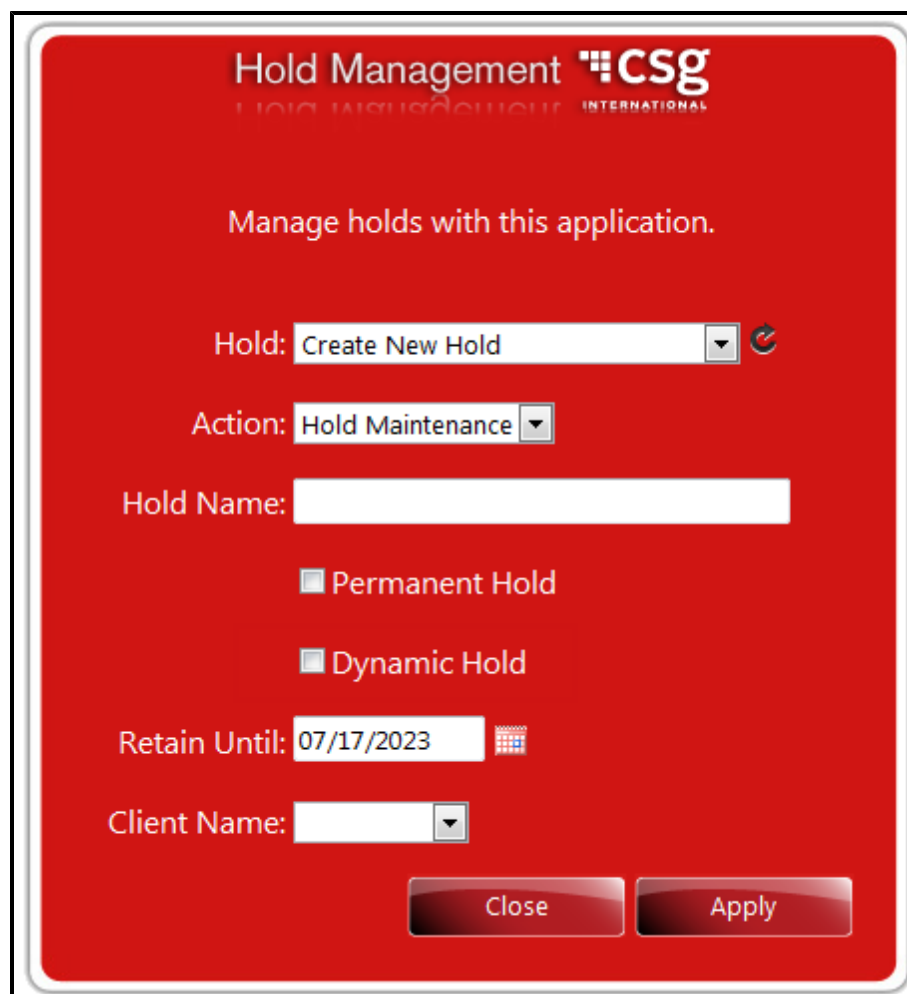
The image shows a 'Hold Management' dialog box with a red background and white text. At the top, it says 'Hold Management' and 'CSG INTERNATIONAL'. Below this, it says 'Manage holds with this application.' The form contains several fields: 'Hold:' with a dropdown menu showing 'Create New Hold' and a refresh icon; 'Action:' with a dropdown menu showing 'Hold Maintenance'; 'Hold Name:' with a text input field; two checkboxes for 'Permanent Hold' and 'Dynamic Hold'; 'Retain Until:' with a date input field showing '07/17/2023' and a calendar icon; and 'Client Name:' with a dropdown menu. At the bottom, there are two buttons: 'Close' and 'Apply'.

Figure 25. Hold Management Pane Item Descriptions

| Item                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Hold</b>           | <p>Identifies the list of holds and the value <b>Create New Hold</b> to create a hold. Select a hold name from this list to edit hold information. The default value for this field is <b>Create New Hold</b>.</p> <p><b>Refresh</b> and <b>Trash</b> icons appear next to this field to refresh this pane or delete a hold.</p>                                                                                                                                                                                                                                      |
| <b>Action</b>         | <p>Identifies the action you want to perform for the hold. Valid values are as follows:</p> <ul style="list-style-type: none"> <li>• <b>Hold Maintenance</b> = Creates a name for the hold</li> <li>• <b>Add Selected Rows to Hold</b> = Adds rows you selected to the hold</li> <li>• <b>Add Entire Result Set to Hold</b> = Adds all results to the hold</li> <li>• <b>Remove Selected Rows from Hold</b> = Removes rows you selected from the hold</li> <li>• <b>Remove Entire Result Set from Hold</b> = Removes all results from the hold</li> </ul>             |
| <b>Hold Name</b>      | Identifies the hold name, up to 35 characters.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <b>Permanent Hold</b> | Select this check box to make the hold permanent. When you select this check box, the calendar icon is unavailable. The default hold date for a permanent hold is 12/31/2099.                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>Dynamic Hold</b>   | Select this check box to set <i>extend legal hold</i> for past or future cycle statements. A <i>dynamic hold</i> is a nightly process that checks for statements that match the criteria you select to create a hold on the appropriate documents. If your criteria extend to a future cycle date, the nightly process puts more statements on hold each night as it looks at what has cycled and sees if they fit the hold criteria. Additionally, a user can manually add records to their dynamic hold that might not necessarily fit the specified hold criteria. |
| <b>Retain Until</b>   | Identifies the end date until InView retains the hold. The default value for this field is 10 years in the future.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Client Name</b>    | <p>Contains the client name. Only internal users see this field. This is a required field for internal users.</p> <p>After you select a client name and create a hold, you cannot change the client name. You must delete the hold and create a new one if you want to select a new client name associated with a hold.</p>                                                                                                                                                                                                                                           |
| <b>Close</b>          | Click this button to close the pane.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Apply</b>          | Click this button to apply your changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

## Selected Criteria Pane

This pane opens next to the [Hold Management](#) pane.

Figure 26. Selected Criteria Pane



Figure 27. Selected Criteria Pane Item Descriptions

| Item              | Description                                                                                                                                                                                                                                                                                                                      |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Selected Criteria | Contains a list of data based on the criteria you select in the search panes. Click the <b>Hold Management</b> button, which can appear under the search panes if you have the appropriate security, to access this pane. Possible criteria includes, but is not limited to, cycle date range, document type, name, and address. |

## View a Hold

An advanced search allows you to search for documents and images based on a customer number (Sys/Prin) or accounts associated with a legal or extended hold.

### TIPS

- If the results are not appearing as you expected, check the fields in the other [search panes](#) to make sure they contain the appropriate information for your hold search. Click **Clear** to reset all fields to their default values.
1. [Log on to InView](#), and click the [Advanced Search](#) pane to view the address search fields.
  2. Select the hold you want to view in the **Legal/Extd Hold** field.

3. Click **OK** to view a list of hold [results](#).

## Edit a Hold

Complete the following steps to edit a hold.

1. [Log on to InView](#).
2. Click **Hold Management** under the [search panes](#) to open the [Hold Management](#) pane.
3. Select the hold you want to edit in the **Hold** field.
4. Modify any hold information, and click **Apply**.

## Add Items to a Hold

Complete the following steps to add items to a hold.

1. Perform a [search](#).
2. Select the accounts you want to add to the hold.
3. Click **Hold Management** to open the [Hold Management](#) pane.
4. Select the hold you want to modify in the **Hold** field.
5. Select **Add Selected Rows to Hold** in the **Action** field to add the rows you selected to your new hold . Select **Add Entire Result Set to Hold** to add all your search results to the hold, regardless of any selected items.
6. Click **Apply**; you receive a modified hold email confirmation.

## Delete Items from a Hold

Complete the following steps to delete items from a hold.

1. Perform an [advanced search](#) to access the hold from which you want to delete items.
2. Select the accounts you want to remove from the hold.
3. Click **Hold Management** to open the [Hold Management](#) pane.
4. Select the hold you want to modify in the **Hold** field.
5. Select **Remove Selected Rows from Hold** in the **Action** field to add the rows you selected to your new hold. Select **Remove Entire Result Set from Hold** to add all your search results to the hold, regardless of any selected items.
6. Click **Apply**; you receive a modified hold email confirmation.

## Delete a Hold

Complete the following steps to delete a hold.



1. [Log on to InView.](#)
2. Click **Hold Management** under the [search panes](#) to open the [Hold Management](#) pane.
3. Select the hold you want to delete in the **Hold** field.
4. Click the **Trash** icon to receive an email confirmation that the system has deleted the hold.

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