

Quick reference guide

Lockbox CD-DVD O.A.S.I.S.

Optical archive system index service

Application Disk

1. Before you can view a monthly Lockbox CD, you must insure that Truist O.A.S.I.S. Application Disk has been installed on each computer needing to view monthly data. This Application Disk is enclosed.
2. Load the Application Disk and follow the steps on the screen.
3. You will be prompted to respond to the License Agreement. Click on **I Agree** to continue.
4. The software will default to a folder location for the application. You may leave this as the location or change it and click **Next**.
5. Confirm the installation by clicking **Next**. Once the message has displayed that the installation is complete, click **Close**.
6. Note that a Truist O.A.S.I.S. icon is now on your desktop.
7. You must now set your data storage location. This location is where your monthly data will be extracted, stored, and ready for viewing each month.
8. To set the data storage location, click on the Truist O.A.S.I.S. icon on your desktop. The application will take a minute to open and you will be asked to set your data storage location. Browse to a location that you want to place the data store. Click **Make New Folder** and name the folder such that you will retain this information for future data loading and searching. We suggest "Lockbox Monthly Data".
9. You may now remove the Application Disk. Retain it in a safe place for loading to additional computers.

Monthly CD/DVD

1. Insert the monthly CD/DVD into your disk drive.
2. If auto run is enabled, you will be presented with an "exe" or Zip file. If auto run is disabled, you will need to go to the CD drive on your desktop to run the file load.
3. Double click on the "exe" file.
4. Select/Browse to the data storage location that you chose in Step 8 above and click **OK**. The file will be unzipped.
5. A password field is presented for your 16-digit decryption password, which was provided to you previously via a secure email. Enter your password and click **OK**. Retain this password for future use with each monthly CD/DVD.
6. Double click the Truist O.A.S.I.S. icon on your desktop. Go to Start/Load CD/DVD.
7. Select the month or months that you want to load, click the Mount check box, and then **Submit**.
8. Once the data has been loaded/mounted, you are ready to begin your research.
9. Click **Archive Search** on the toolbar and enter search criteria. If you have multiple months loaded to your data store, you can search across those multiple months.
10. Once your search criteria have been entered, all items meeting your criteria will present in the Results tab.
11. To view images of the items, click on either the first icon to view the single image highlighted or the second icon to view all the images for that transaction.
12. To print the item, click the checkbox labeled Use Windows Default. The image will be displayed in Windows Picture and Fax Viewer, or a similar viewer application, and can be printed using the Print Icon in the bottom of the pane.

Lockbox: CD-DVD O.A.S.I.S.

For more information

If you need further assistance, contact Treasury Management Client support at treasuryclientservices@truish.com or **800-774-8179**. Representatives are available from 8 am to 8 pm ET, Monday through Friday on bank business days.