

8

Documentation: Tricks of the Trade

Electronic Document Management Tools

TIP #1: We Don't Currently Have an Electronic Vault? What Can I Read to Learn More?

Are you still considering which vault to choose for your credit union. Want to read more about your choices? Look no further than the “Electronic Document Solutions” brochure shown to the right. In it you will find side-by-side comparisons of the three vault choices to help you determine which is the right choice for your credit union’s electronic documents strategy.

Find this document at edocs.cuanswers.com or in the e-Documents section of the Special Interest Docs Page.

TIP #2: Where Can I Find All the Documentation on e-Documents?

Find all the documents listed in this brochure and more on the **CU*Answers eDocuments Strategies website**.

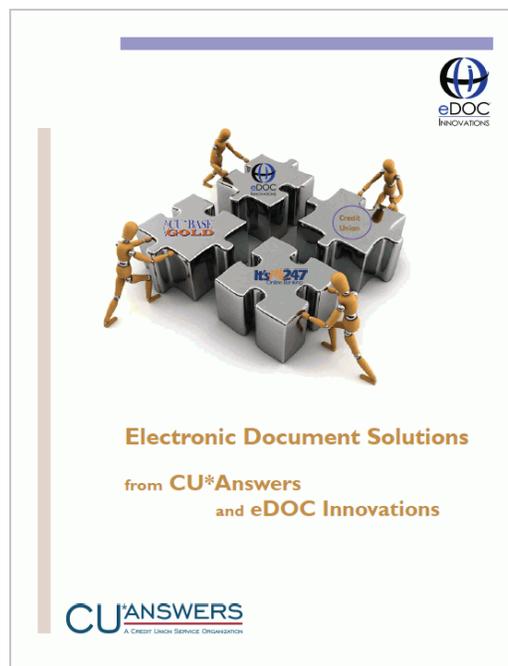
<http://edocs.cuanswers.com>.

Also check out the **e-Documents: Electronic Documents Strategies and Solution** section on the Special Interest Publications page. Learn more online via “I am a Client > Docs & Information > Special Interest Docs.”

http://www.cuanswers.com/client_special_interest.php#e

Read the “Going Green” publication to learn more about planning for a more paperless environment.

e-Document Strategies
CU*ANSWERS Management Services



Are you part of the 33% of credit unions without a vault? Check out this document to find out which electronic document vault is right for your credit union.

TIP #3: What Does it Mean to “Go Paperless?” Where Can I Learn More?

Is your credit union considering eliminating the amount of paper it uses, but needing an expert opinion on how to get started?

The “Going Green: Best Practices for Eliminating Paper” brochure discusses many frequently-asked questions on this subject. This introduction to the subject discusses the process of “going green” from many different angles, giving the reader new insight the complexities of this subject.

Find this document at edocs.cuanswers.com or in the e-Documents section of the Special Interest Docs Page.

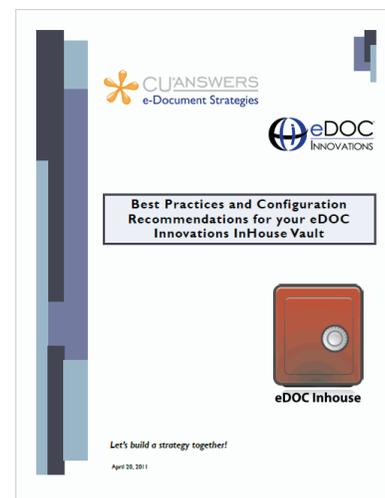
TIP #4: Where Can I Read More About In-House Vault Best Practices and Configuration Recommendations?

Maybe you are not sure you need to read this document—Isn't the whole reason for buying an in-house solution so you can have it your way?

Fair questions with a simple answer. eDOC Innovations is indeed the expert on configuring your system, but they will turn to you for direction on how you want it configured. So what should you tell them?

That's where these recommendations come in. eDOC Innovations and CU*Answers eDocument Strategies Team have partnered to communicate what we know will work well to integrate an eDOC Innovations in-house system with CU*BASE. Use this document as a recommendation for best practices based on the experience of our experts.

Find this publication on the e-Documents website at <http://edocs.cuanswers.com>. Or check the "e-Documents" section of the Special Interest Docs page (direct URL on front page).

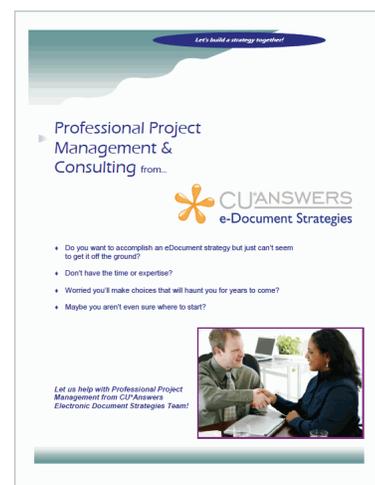


TIP #5: Where Can I Go for Answers to More Specific Questions That Relate to Just My Credit Union's e-Document Needs?

Maybe these publications are helpful, but what you really need is someone to sit down with you and answer questions you have that are specific to your credit union's e-documents strategy.

In this case, you may also want to read the "Professional Project Management & Consulting" publication shown to the right. This document outlines a service offered by our CU*Answers e-document strategy specialists. Maybe you want someone to manage your e-document strategy implementation. Maybe you fell off track and need some assistance moving forward. Or maybe you just want occasional assistance. Read this document to learn more about your options.

Find this publication on the e-Documents website at <http://edocs.cuanswers.com>. Or check the "e-Documents" section of the Special Interest Docs page (direct URL on front page).



CU*ANSWERS
A CREDIT UNION SERVICE ORGANIZATION

6000 28th Street, SE
Grand Rapids, Michigan 49546
<http://www.cuanswers.com> 616-285-5711