

17.05

Imaging Solutions Software Release

Beta	Online	In-House
n/a	May 28, 2017	May 28, 2017

What is this release?

This release is the 17.05 Imaging Solutions release for online, enhanced online, and in-house release managed clients. Some features do not apply to all three types of clients. Refer to the symbols within the document for details.

How do I get this release?



In-House Managed Clients: Imaging Solutions will be contacting you to schedule the update of your system for this release starting May 28.












Have an in-house imaging server, but are not a Release Managed client? Sign up for Release Management today and we will waive the fee for the first year! Other options are also available. Contact Imaging Solutions for details at imaging@cuanswers.com.



Enhanced Online/Online Clients: Imaging Solutions will deploy your release on May 28.

If you have any questions please email us at imaging@cuanswers.com.

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Updates for All Imaging Clients



Added Support for Chrome CU*Spy Reports and Statements from CU*BASE

Currently members can view statements using any supported browser, but staff accessing statements or reports from CU*BASE needed to view these items using Internet Explorer. With this release Chrome can also be used to view reports and statements accessed from CU*BASE.



Additional Imaging Enhancements

We have additionally optimized the storage of images (including receipts scanned at the drive-thru line) to streamline them to reduce storage space and speed retrieval. This feature expands upon optimization currently occurring with photo IDs provided by a member. All of this saves us space and helps us manage costs, saving you money!

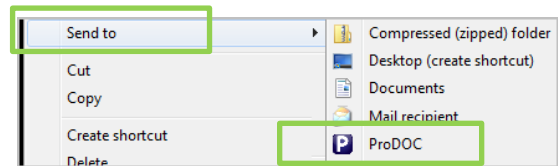
ProDOC



Enhanced ProDOC Now Allows Import of Digital Images



Now you can use enhanced ProDOC to import more types of digital images, such as documents saved to your computer (in accordance with your warranty). To import the documents, use the new "Import File" button on the top of the ProDOC software. A browser will appear allowing you to select the file. Or right click on the file and use "Send to" and then the new "ProDOC" selection.



Both methods will present the document in ProDOC so you can save it to your vault.

Vault Manager



Status Event Emails for Vault Manager

Vault Manager displays files and services requiring your attention so that you can monitor the flow of data to your eDocument vault. Now instead of going into Vault Manager to view if items need attention, you will be able to set up event emails to notify you if there is a status that needs review. Think of it as a new feature where the phone rings, instead of you picking of the phone and seeing if there is a reason to make a call.

When the release is implemented, CU*Answers Imaging Account Executives will assist you with setting up these new Event Notifications, available in the Scheduled Jobs section of Vault Manager.



Automated Updates of Loan Closed Dates on Closed Loans

If your records retention schedule says you should purge loan-related documents after the loan has been closed for xx years, in order to do that the documents in your archive need to be flagged with the date when the loan was actually paid off and closed. Currently the

documents in your archive are not aware of the loan's status on CU*BASE unless someone manually goes in and updates the index.

New with this release, we are adding a process that will automatically update your closed loan records. The process is two-fold. Every night the system will take a file from CU*BASE and (based on data in the file) update the closed date on the loans stored in your vault. Then using your records management schedule the documents can be moved to a "closed loan" table or purged from the system.

The update of the loan closed date will begin with the implementation of the release. An Imaging Solutions Account Executive will assist you with setting up the purge in Vault Manager.

*Interested in assistance with your records retention strategy? The CU*Answers Records and Information Management Consulting team can help Contact Marilyn Boyd CRA at extension 112 for more information.*

eDOC eSignature



eDOC eSignature is Now Powered by eDOC Innovations' New Native eSignature Product

eDOC eSignature is a remote-signature product that integrates the solution right into the credit union workflow through ProDOC and ProDOC Packages. Documents can be flagged for signature and then sent and returned back into the archive without ever touching paper. With this product, in-branch or out-of-branch signatures can be captured. Currently the vendors integrated into ProDOC Packages for eSign are Sertifi and DocuSign.

With the 17.05 release Imaging Solutions software release, we are adding the highly-anticipated support of eDOC Innovations' new native signature solution. Packages users can now use this native platform integrated into Packages.

If you do not currently use eSign or are looking to make a change, eDOC's native integration is now available and may be a good option for you.

If you currently use Sertifi or DocuSign, you may continue to do so for the time being. In the future, support for these vendors will incur fees. Contact eDOC Innovations for more information.