Imaging Solutions Software Release

18.06

Beta	Online	In-House
n/a	**June 10, 2018**	**June 10, 2018**

What is this release?

This release is the 18.06 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 June 11.

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 June 10.

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

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May 24, 2018

ProDOC

Members Use "It's Me 247" to Access Forms for Remote Signing

Currently you can send forms through eSignature, and the system sends an email to the member that provides a link to the form they need to sign remotely. Members can also be provided an authorization code to provide an additional layer of security. Now with this release, you can also send members to the **It's Me 247** Secure Message Center to access the link to sign the form. This provides even tighter security and increased peace of mind for your members, as they must use their online banking login credentials to access the form.

You initiate the notification that the form is available via online banking by selecting the *Notification Type* of *Online Banking Signing Room* at the bottom of the Signer Information screen. If online signing is selected, then a *Notification Account* is also required.)

The member receives notification via email and once they log into online banking, they will see the new Virtual Closing Room launching room entry page (shown to the right) alerting them that they have a form(s) to sign.
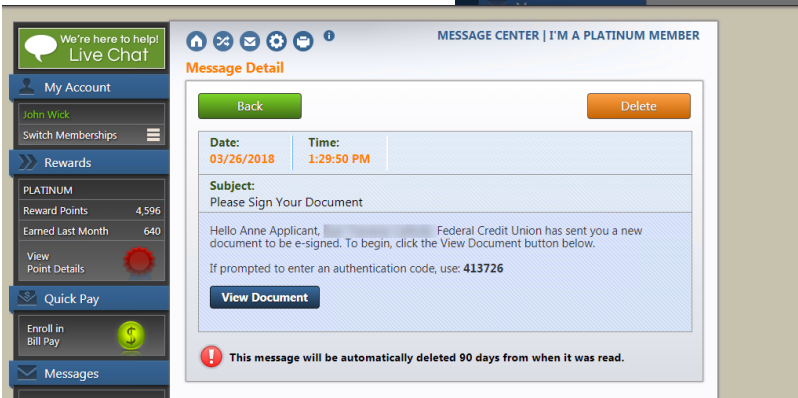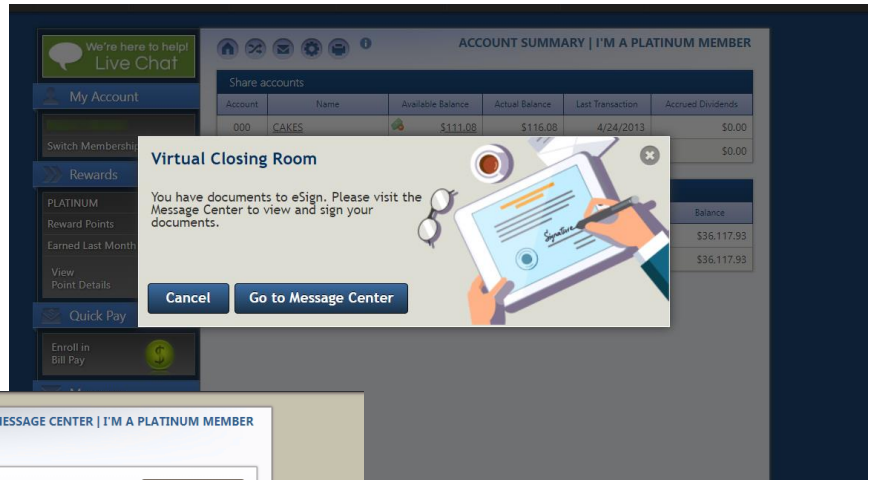
The member clicks "Go to Message Center" and accesses the secure Message Center message (shown below). The member clicks "View Document" to access their form to sign it. The rest of the remote signing process continues as usual.

In a day when members are told never to click on a link in an email, this new toolkit lets you still give security-conscious members access to their forms, when and where they have time to sign them.

Now Designate the Name to Sign Your eSign Documents

Currently there is no way to designate what name the member must use to eSign their documents.

Now when preparing a document for eSign you can check the new "Force user to use this name below as signature" box to force the signer to use the name designated by the credit union staff on the Signer information screen.

"Bundle" Multiple Forms for Remote eSigning with eDS Packages

Currently if the loan has multiple forms the member needs to sign remotely, they get multiple emails. Beginning with this release, the eDS Package feature will automatically be implemented, allowing you to group multiple forms in a "bundle" and send them for eSigning at the same time.

A new "Add to eDS package" will appear at the top of the *Signer Information* screen allowing you to group documents together in a "package." After the last form is generated, check "Last Document," and send as usual.

The member will receive one email notification, either with the link to sign forms or a message to go to the Secure Online Message Center (new with this release) to remotely sign the forms.   When the member clicks the link, a new interface presents all their forms in a list and allows them to review the forms once they are signed.

Search ProDOC for Pending Documents and Pending Documents in Packages

With this release ProDOC you can filter your search results in the Pending area to search not only for single documents but for pending documents in packages as well. Use the new "Filter Results" box.

It's Much Easier to Review and Update Package Indexes

Currently updating indexes for documents in a package is a manual process requiring to you open each document to verify the package contains the correct documents.

With this release, you can easily view all document indexes in a package and update them with a click of a button. This re-indexing feature has been added to the "Close Out" process, making it easy to review your indexes again before closing a package.

If a document is missing an index (for example an index that was not available when the package was created, such as suffix), click "Copy Package Values to Checked Documents." A confirmation window is provided to allow you to accept or reject the change.

(See image on next page.)

	STATUS	FORM	Account	First_Name	Last_Name	Open_Date	SSN	Suffix	+
		Package Indexes	123	John	Doe	05/04/2018	123456789	123	
☐	Saved	Short Form Application	123	John	Doe	05/04/2018	123456789	123	
☐	Saved	LOWS Loan Officer Worksheet	123	John	Doe	05/04/2018	123456789	123	
☐	Saved	NADA - CREATE	123	John	Doe	05/04/2018	123456789	123	
☐	Saved	PhotoID	123	John	Doe		123456789		
☐	Saved	Co-Signer Agreement	123	John	Doe	05/04/2018	123456789	123	
☐	Saved	Badge ID Test	123	John	Doe	05/04/2018	123456789		

CU*Spy Images

View Multiple Documents at the Same Time in idocVAULT

Currently you can only view images in idocVAULT in the right pane which restricts you to viewing only one image at a time. With this release we have added two new icons in the left panel that let you select whether to view the image in the right pane (the current method) or to pop out the image in a separate window (a new feature!). Now you can view multiple forms at the same time and more easily view the entire image.

iDocLnk

iDocLnk Now Supports GMT

Currently you must configure idocLnk to allow log in after daylight savings time. Now, iDocLnk will automatically adjust the time by using GMT. This is one less task to remember and eliminates idocVAULT login issues for staff during time changes.

Vault Manager

Tracking Added to My Virtual Strong Box (MVSB) Uploader and eSignDOC

Vault Manager will now track MVSB Uploader and eSignDOC to ensure these processes are running correctly. All errors will be reported to Vault Manager for follow up with alerts set up by the credit union.

Alerts Added to Orphaned Files and Database Entries

Currently you need to manually check the history of the Vault Manager to find orphaned files or database entries. Now Vault Manager will alert staff (by email or text message) when orphaned files and database entries are found.

Software Versions

Below are the versions currently in use with this release:

2020DOC	7.3.1.28
CBR Processor	7.0.0.12
ConState	7.3.1.26
DFCViewer	7.3.1.14
Doclib / Doclib Config	2.2.1.10
Document Server	7.3.1.21
eDOC-It Virtual Printer	8.1.1.8
EsignDoc	7.3.1.54
iDocLnk	7.4.0.2
IntelliSweep	7.3.1.9
IntelliSweepAdmin.exe	7.3.1.9
Job Management Service	1.1.0.11
MVSBUploader	7.3.1.5
MySQL	5.5.59
MySQLConfig	8.3.0.2
PHP	5.6.34
ProDOC	7.3.5.50
RAP	8.2.0.19
scripts/iDocVault - ASP	7.3.2.4
Security Manager	7.3.1.18
SrchLnk	7.1.0.4
Upgrader	7.3.1.2
Vault Manager	1.1.2.2

For additional details on version changes please contact Imaging Solutions.