

20.06

Imaging Solutions Software Release

Beta	Online	In-House
05/10/2020	06/28/20	06/28/20

What is this release?

This release is the 20.06 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 28th, 2020.

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 28th, 2020.

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

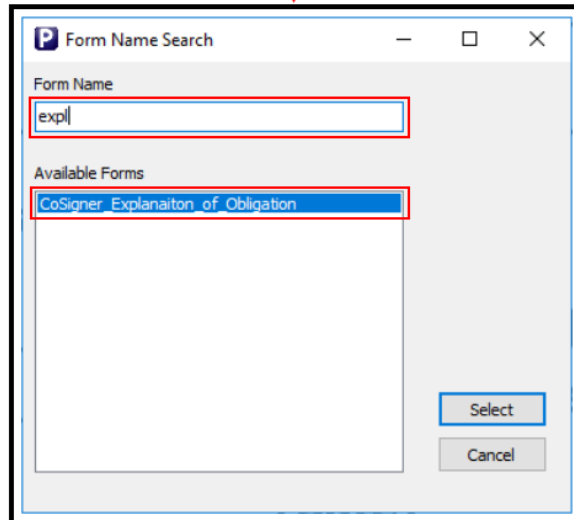
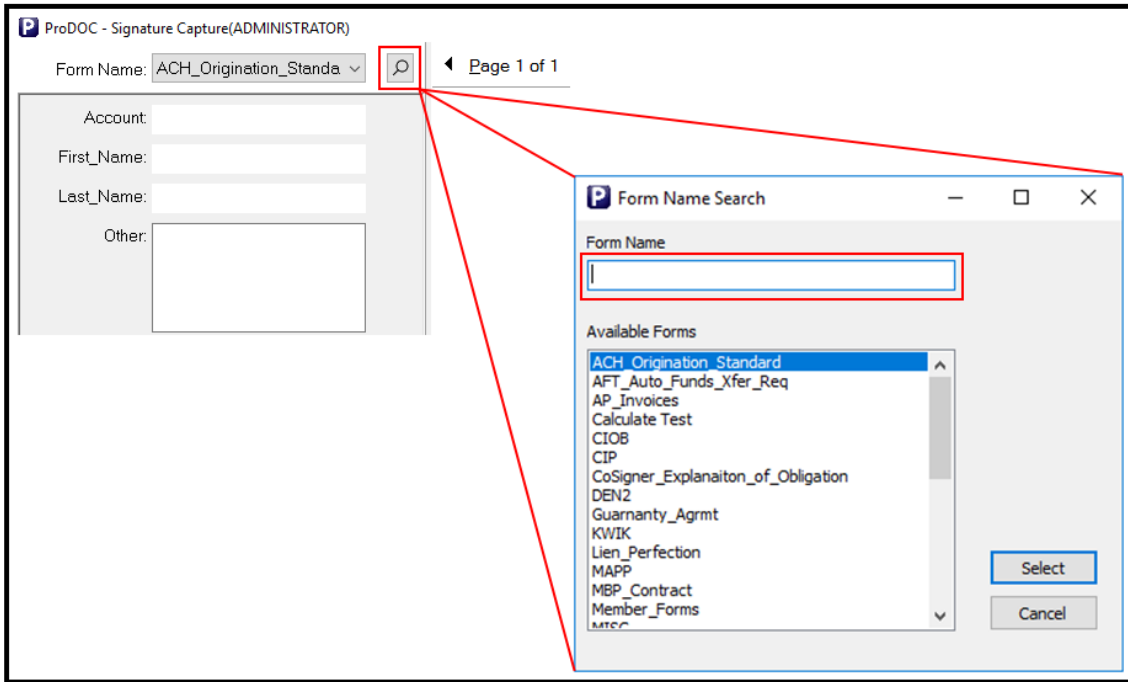
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Searching for Forms Just Got Easier!

Here is a feature that everyone will like! To make it easier to find your forms, there is now a search button next to the Form Name drop-down list. Click it to view all available forms and then filter your results using any part of the form name. This will help save your staff time when looking for specific forms!





“Sign Now” Signing Allows You to Send to a Web Browser or Tablet

With the Enterprise tier of eDOCSignature, you can now take advantage of the new “Sign Now” feature. Sign Now allows you to send your documents directly from ProDOC to a web browser on a PC, tablet, or phone to obtain your member’s signature. This is especially handy if a signature pad is unavailable, or even as a replacement for signature pads entirely.

If you are interested in upgrading your eDOCSignature tier or discuss branding and marketing options for your signing interface, please reach out to the eDOC helpdesk at 1-800-425-7766, Option #2.

Note: ProDOC Packages still uses existing document routing methods and will take a little longer when using Sign Now packages.

The image shows two screenshots from the eDOCSignature application. The top screenshot is a 'Signer Information' dialog box. It contains several sections: 'Add to eDS package' with a dropdown menu and a 'Last Document' checkbox; 'Force signer to use the name below as signature' checkbox; 'Include Applicant' section with a checked checkbox and a table for role, name, and email; 'Signature boxes to include' section with a list of checkboxes for 'Closed-End Applicant Signature', 'Closed-End Applicant Date', 'Open-End Applicant Signature', and 'Open-End Applicant Date'; and 'Notification Type' set to 'Email'. At the bottom are buttons for 'Generate Authorization Codes', 'Sign Now' (highlighted with a red box and an arrow), 'Done', and 'Cancel'.

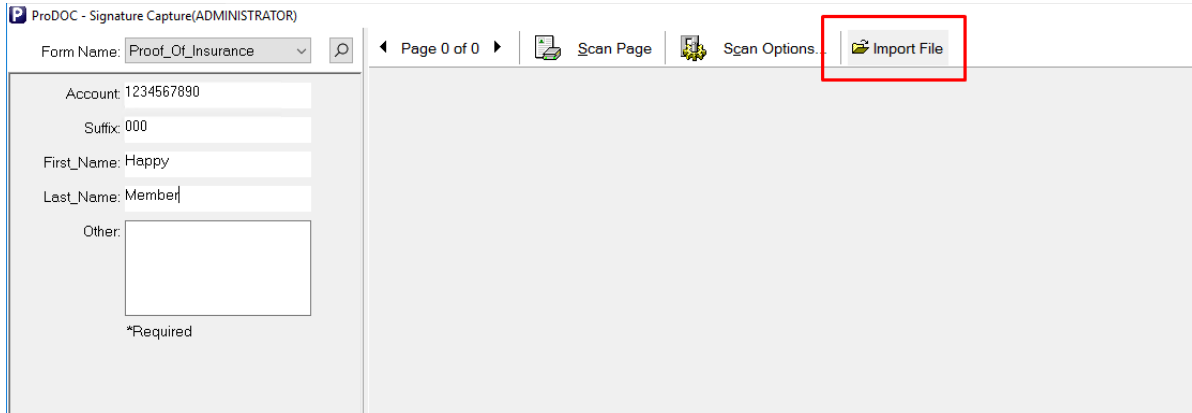
The bottom screenshot is a web browser window showing the 'SIGN DOCUMENTS' interface. The page title is 'SIGN DOCUMENTS' and the URL is 'edocsignature.edoclogic.com/Signing/index.php'. The main content is titled 'EXPLANATION OF PERSONAL OBLIGATION' and contains instructions for signing. It includes 'Section A: CLOSED-END CREDIT' with fields for customer name, credit union name, date, and total payments. Below this are two signature lines: one with a 'TAP TO SIGN' button (highlighted with a red box) and another with a 'TAP TO DATE' button (also highlighted with a red box). At the bottom are 'Cancel' and 'Next' buttons.



Increased PDF Import Compatibility, Easier to Import a PDF

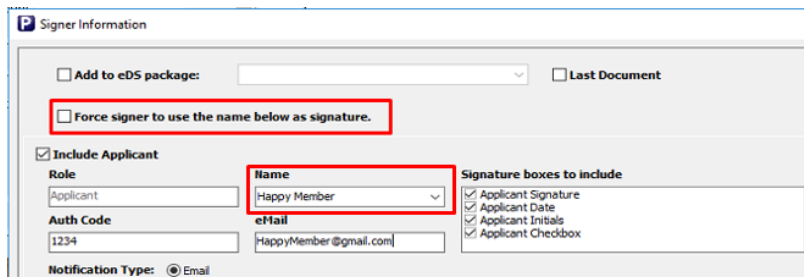
In the past, if a PDF contained certain elements, had write protection enabled, or was password protected, the import would fail with an error.

Overall support for PDF documents is greatly increased. Additionally, if a PDF is write-protected or password-protected, you will simply be prompted for the password upon import, rather than getting an error.



Force Signer Names via eSign and Save a Step!

By default, ProDOC allows you to optionally force a signer to use the name below the signature, as shown below.



With this release, ProDOC can now force signer names for every document sent for eSign! Once enabled, ProDOC will always make the signer use the name as typed in the Name field. The checkbox to enable/disable will no longer appear on a per-document basis.

If your credit union is interested, contact eDOC support at 1-800-425-7766, Option #2.



eSign Email Domain Validation

ProDOC can now prevent using an email domain unless it is on the allowed list. This helps against accidentally typing the incorrect email domain. The default allowed domains are as follows: .com, .net, .org, .info, .biz, .gov, .us, .mil, and .edu.

To add additional domains contact eDOC support at 1-800-425-7766, Option #2.

ArchView (Archive Viewer)



Receive eStatement Discs in Your Custom Colors

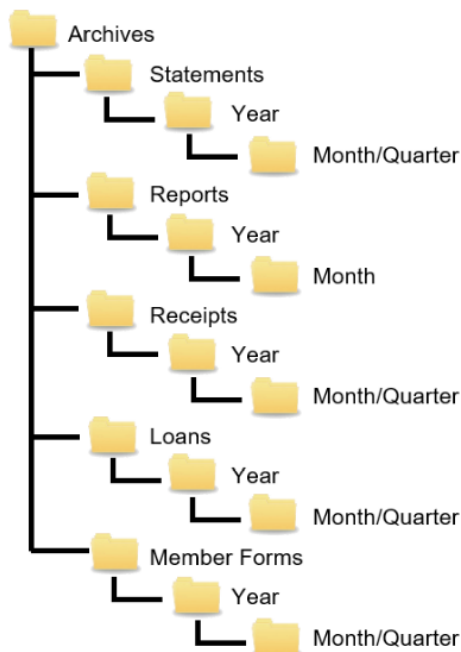
If you are signed up for [eStatement Accent Colors](#), ArchView will now honor these custom accent colors when creating archive discs. Now your archives will match your in-house vault and/or CU*Spy!



Custom Folder Naming Puts You in the Driver's Seat

Whether you are creating your own archive discs or CU*Answers is creating them for you, you can now copy the archives to meaningful folder names of your choosing. When copying the contents of archive discs to a network drive, the viewer no longer requires its folder be named the same as the original storage media (ex: CUA000200501). Now, you are free to rename the storage folder with a naming convention that meets the needs of your credit union.

An example folder structure for storing archives on a network drive is as follows:



Additionally, you can adapt your old archive folders to the new format. The folder name (ex: CUA000200501) can be copied to the archive.ini file that exists within each folder. Once it has been added, you may rename the folder. The information can be added using the following format.

[Info]

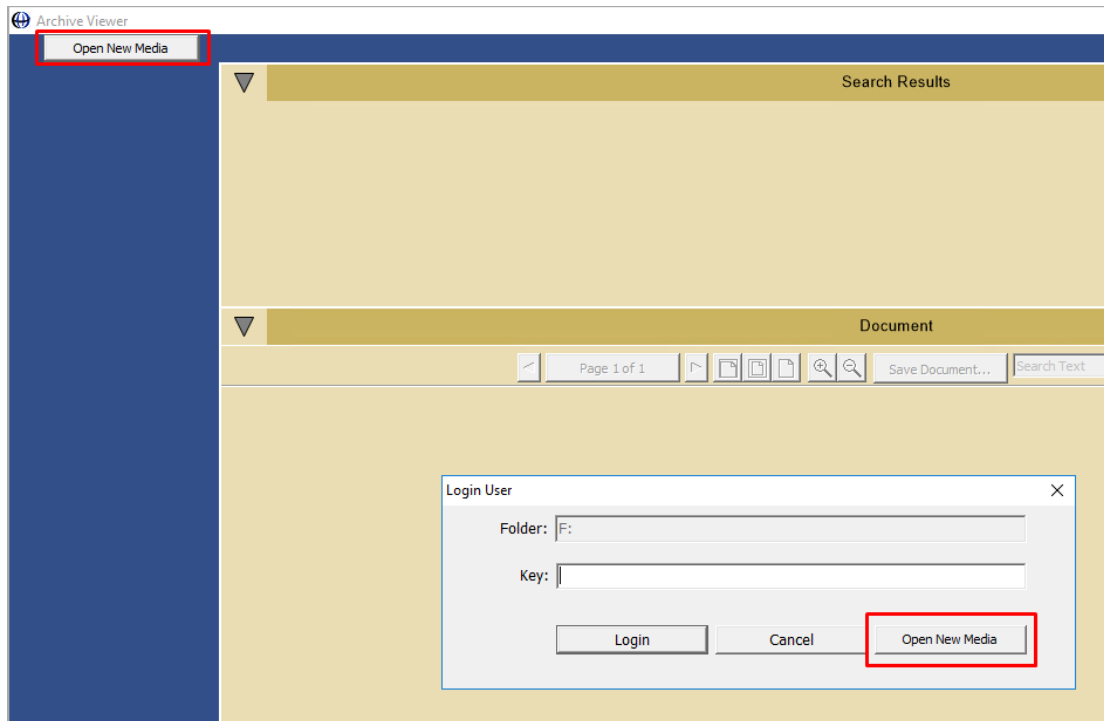
VolumeName=CUA000200501

Keep in mind, if you do this, you will not be able to use the old viewer anymore. You will need to use the new viewer.



Open New Media Button Keeps You in the Current Viewer Window

Another new feature to complement custom folder naming for ArchView is the Open New Media button, which allows you to browse to any archive folder on your network and open it using the current viewer window. This new feature allows you to more easily access various folders without having to relaunch the application repeatedly. Additionally, you can open older archive volumes that may otherwise require additional software installation to function in Windows 10.



iDocLnk



Now You Can Use Your Preferred Default Browser

iDocLnk facilitates the single sign-on to your iDOC Vault, bypassing the need to input a username and password. Previously, a web browser (typically Internet Explorer) had to be defined in the configuration across your whole organization. Now that configuration is removed and iDocLnk will honor whatever default browser is defined on the PC. This allows your staff to use their preferred browser. Imaging Solutions will reset this option during your 20.05 upgrade.

Software Versions

Below are the versions currently in use with this release:

Product	New Version
2020DOC	7.7.0.3
2020DOC Install	7.7.0.2
ArchiveISO	7.9.0.3
ArchiveJobController	7.9.0.3
ArchiveViewer	7.9.0.3
AutoImportCon	7.7.0.0
Doclib	2.2.5.4
Document Server	7.7.1.10
EsignDoc	7.7.0.1
iDocLnk	7.4.0.4
IntelliSweep	7.8.0.0
IntelliSweepAdmin.exe	7.8.0.0
ISAPI/Gateway	7.8.0.2
iSweep.exe	7.8.0.2
iSweepAdmin.exe	7.8.0.2
Member Document Portal	1.0.0.30
MySQL Sever	5.7.29
MySQLConfig	8.8.0.3
PHP	7.2.28
ProDOC	7.8.0.16
ProDOC MSI	7.8.0.5.1
RAP	8.8.0.2
RIP	8.8.0.0
scripts/iDocVault - In-House	8.9.0.2
Security Manager	7.8.0.4
SrchLnk	8.6.0.7

For additional details on version changes please contact Imaging Solutions.