

21.03

Imaging Solutions Software Release

Beta	Online	In-House
03/01/21	03/28/21	03/28/21

What is this release?

This release is the 21.03 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 March 28th, 2021.

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 March 28th, 2021.

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

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ProDOC



Text Message Notifications

You can now send text messages to your members using ProDOC and eDOCSignature. This gives your credit union the ability to electronically talk to every generation of your members through eSign. If you're interested in signing up for this service, please browse to <https://edoclogic.com/product/sms-notifications/> and sign up in the store.

Signer Information

Force signer to use the name below as signature.

Include Applicant Use personal data verification

Role: Applicant Name: [dropdown] Signature boxes to include:
 Applicant Signature
 Applicant Date
 Applicant Initials
 test
 SigBox9

Auth Code: B56A eMail: [dropdown]

Notification Type: Email Online Banking Signing Room Text (SMS) Notification Phone: [(123)456-7890]

Include Co-Applicant Use personal data verification

Role: Co-Applicant Name: [dropdown] Signature boxes to include:
 Co-Applicant Signature
 Co-Applicant Date

Auth Code: 2999 eMail: [dropdown]

Notification Type: Email Online Banking Signing Room Text (SMS)

Generate Authorization Codes Done Cancel



Forms and Packages Filtering

Narrow your search by typing! With this feature you can easily start typing the name of the form or package (packages do not apply for online or online enhanced clients) with which you want to work. No need to scroll through a long list of names to find what you are looking for.

ProDOC - Signature Capture(DETTERMAN)

Form Name: Just [dropdown] Page 1 of 2 Scan Pe

Account: [input]
Suffix: [input]
SSN: [input]
First_Name: [input]
Last_Name: [input]
Closed_Date: [input]
Open_Date: [input]
*Required

Applicant is applying

Your account number: [input]

APPLICANT

Full Name: [input]
SSN: [input]
Birth Date: [input]
ADDRESS: [input]

Add this document to package:

Just [dropdown]
Create New
Just Start Typing

ProDOC - Continued



Add & Remove Form Elements

Easily remove form elements from your forms with a click of button! With this new feature, your credit union no longer needs to have duplicate form templates for “Scan” and “Create” forms. When removing form elements, ProDOC moves index values from the document to the left-hand column.

The screenshot shows the ProDOC interface for editing a form. At the top, there is a menu bar with buttons: Scan Page, Scan Options..., Add Fillable Field, Import File, and Remove Form Elements. The main area contains a form with the following text and fields:

hereby authorize Demo Company to initiate automatic deposits to my account at the financial institution named below. I also authorize Demo Company to make withdrawals from this account in the event that a credit entry is made in error.

Further, I agree not to hold Demo Company responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.

Credit Union Account Information

Members CU Account Number: *Account

Members Name: First_Name Last_Name

Members SSN: *SSN

Members Phone Number: Phone Number

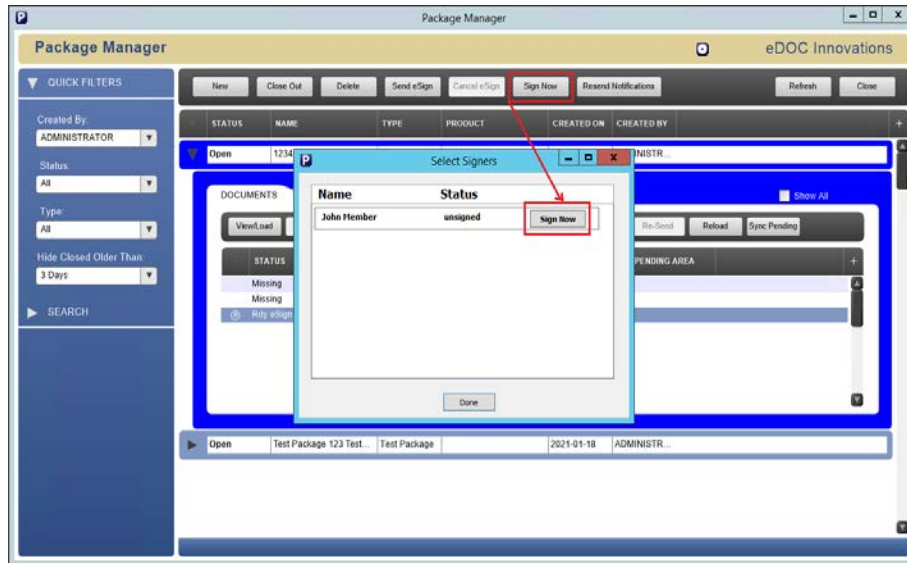
A red arrow points from the 'Remove Form Elements' button in the menu to the '*Account' field in the form.



Sign Now – Just got faster!

In the past, Sign Now from packages had a delay as the documents moved through the system to be sent for eSign. Now when your staff click “Sign Now” the documents are instantly uploaded to the eDOCsSignature website and prepared for signing.

Don’t forget, this feature isn’t just meant to have your members sign from a tablet. Your staff could start eSigning their documents right from the packages screen.

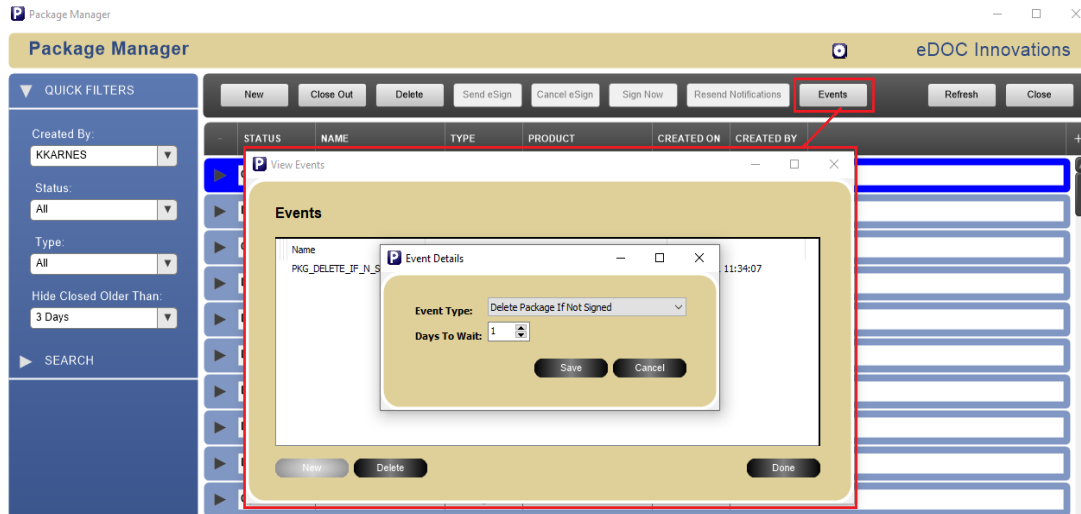


ProDOC - Continued



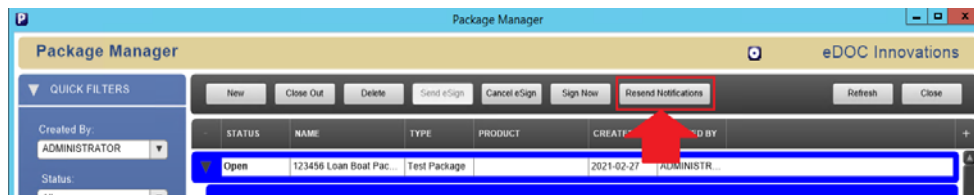
Packages Events

You can now set events in ProDOC Packages to resend eSign notifications, notify staff if documents are not signed, and delete an eSign package if documents are not signed by a time frame of your choosing.



Packages Resend Notifications

With the new “Resend Notifications” button in Package Manager, you can resend eSign notifications to your members. This saves you the step of logging into the eDOCSignature website to resend notifications.



ProDOC Now Uses your Default Web Browser



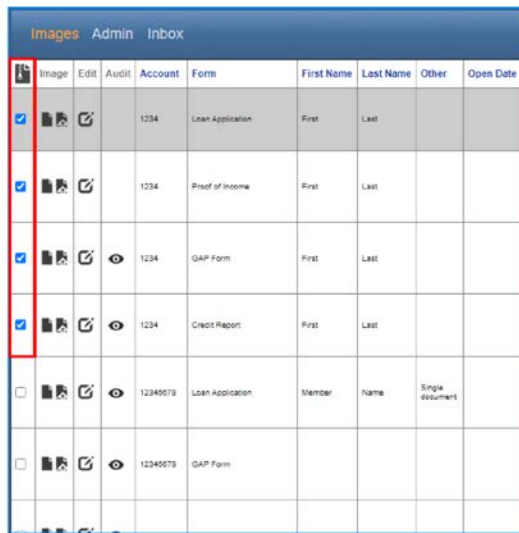
Prior to this release, ProDOC would specifically call Internet Explorer. Now, it will check to see which web browser is set as your default and open Document Signing Status/Send Document for eSign using your default web browser.

iDocVAULT

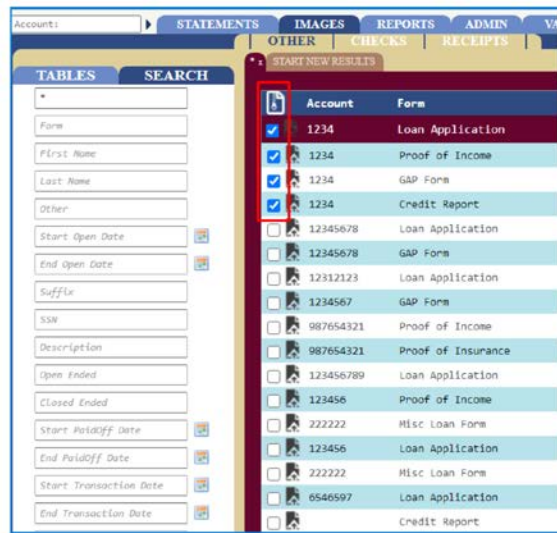


Download Multiple Files in a Zip

Save time by downloading multiple documents in iDocVAULT! Tick the checkbox next to each document you want, then click the zipped document icon at the top of the column and your browser will download a zip file containing all selected forms.



Online/Enhanced Vault

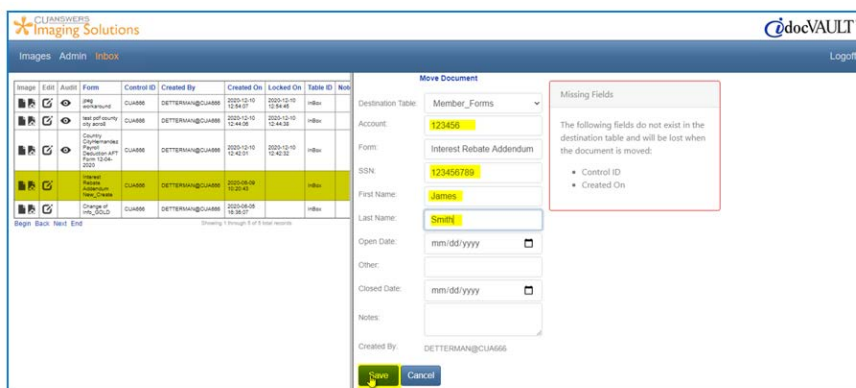


In-House Vault



Enhanced InBox Permissions

The InBox is now easier to manage! Previously, re-indexing and moving documents out of the InBox required admin permission. With this release, any authenticated staff member can move their signed document from the InBox to the desired destination tables and update its indexes.



eDOCSignature



eDOCSignature Target Tables

Bypass the InBox completely! With this feature, you now have more control on where your eSign documents get placed after being signed. Select the table and enter the document indexes right before sending the document out for signature. This will save your staff lots of time by not having to move documents from the InBox.

The screenshot shows a web application interface titled "Edit Index Definitions". At the top, there is a navigation menu with tabs for Profile, Users, Groups, Signers, Disclosures, Indices, Tags, Roles, eDOC-It, and Events. The "Indices" tab is currently selected. Below the navigation, there are "Delete" and "Save" buttons. The main content area displays an "Index Definition" dropdown menu set to "Loans". Below this, there are five "Field Name" labels, each followed by a text input field and a trash icon. The input fields contain the following text: "Last_Name", "First_Name", "Account", "Suffix", and "SSN".

Software Versions

Product	New Version
2020DOC	7.11.0.1
2020DOC Install	7.11.0.1
DFC Viewer	7.11.0.0
Document Server	7.11.0.2
EsignDOC	7.10.0.0
Imaging API	1.3.4
Forms Manager	0.1.4
IntelliSweep	7.12.0.0
IntelliSweep Admin	7.11.0.0
ISAPI/Gateway	7.10.0.2
ISAPI/Web Portal	7.10.0.1
iDocVAULT-Inhouse Pages	8.11.0.2
iDocVAULT-ASP Pages	7.4.0.23
MySQL Config	8.12.0.6
ProDOC	7.11.0.13
ProDOC Install	7.11.0.13
PHP	7.4.15
RAP	8.11.0.6
Security Manager	7.11.0.2
Statements	7.10.0.2
Statements Install	7.10.0.2
Upgrader	7.3.1.3

For additional details on version changes please contact Imaging Solutions.