

21.10

Imaging Solutions Software Release

Beta	Online	In-House
08/23/21	10/10/21	10/10/21

What is this release?

This release is the 21.10 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 October 9th, 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 October 9th, 2021..

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

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iDocVAULT



Update Multiple Indexes

In the past, users updated indexes one at a time. With the new update multiple index feature, staff will be able to search and select multiple documents and update all their indexes with a click of a button.

In-House: Tick the checkbox next to each document you want to update, then right-click and choose “**Edit Selected**”, select, and type the index values you’d like to update, then click *Save*.

The screenshot shows the iDocVAULT In-House interface. A table lists documents with columns: Account, Suffix, Form, First Name, Last Name, and SSN. Two documents are selected with checkboxes. A sidebar on the left titled "EDIT DOCUMENT FIELDS" shows "Records Selected: 2" and a list of fields with checkboxes. The "Account" field is checked and highlighted with a red box. A "Caution" message states: "Selected fields below will replace saved values in all the selected documents."

Account	Suffix	Form	First Name	Last Name	SSN
222222	002	Misc Loan Form	Happy	Member	654987321
<input checked="" type="checkbox"/> 123456	002	Misc Loan Form	Happy	Member	654987321
<input checked="" type="checkbox"/> 123456	002	Calculate Test	Happy	Member	654987321

Online: Select “**Update Indexes**” along the top, enter your search criteria, tick the checkboxes next to the documents you’d like to update, click the edit icon, select, and type the index values you’d like to update, then click *Save*.

The screenshot shows the iDocVAULT Online interface. A table lists documents with columns: Image, Account, Form, First Name, Last Name, Other, Open Date, Suffix, SSN, and Descr. Two documents are selected with checkboxes. A top navigation bar includes "Update Indexes" which is highlighted with a red box. A sidebar on the right titled "Edit Indexes" shows "Records Selected: 2" and a list of fields with checkboxes. The "Account" field is checked and highlighted with a red box. A "Caution" message states: "Selected fields below will replace saved values in all the selected documents."

Image	Account	Form	First Name	Last Name	Other	Open Date	Suffix	SSN	Descr
<input type="checkbox"/>	222222	Misc Loan Form	Happy	Member			002	654987321	
<input checked="" type="checkbox"/>	123456	Misc Loan Form	Happy	Member			002	654987321	
<input checked="" type="checkbox"/>	123456	Calculate Test	Happy	Member			002	654987321	

eDOCSignature



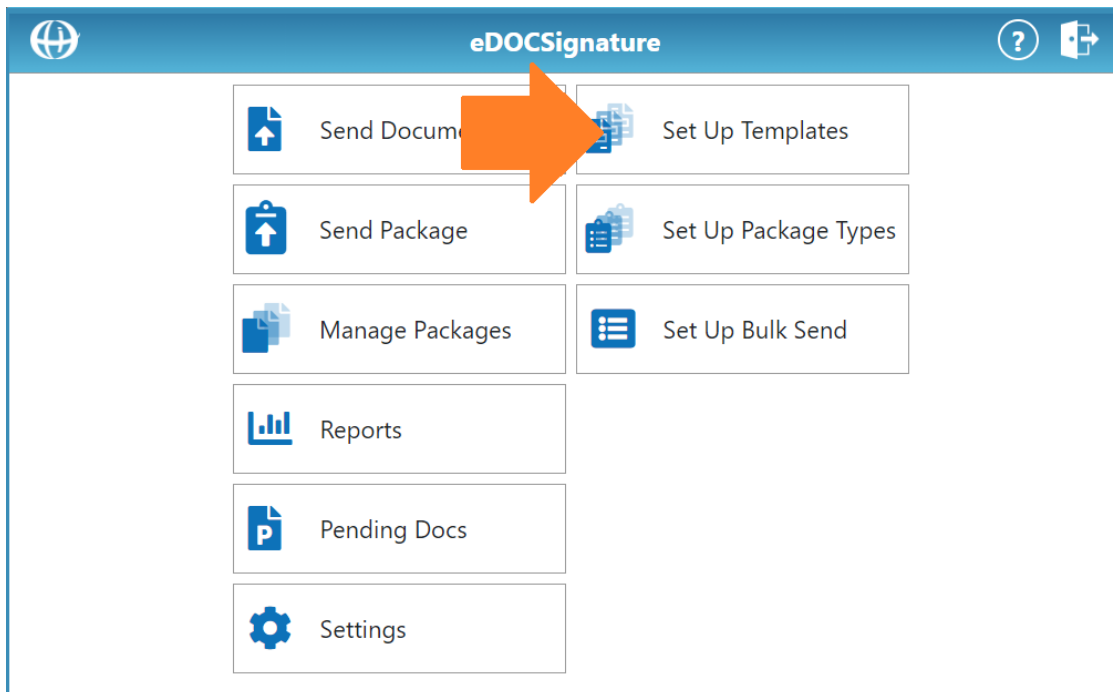
Create Form Templates

New to our Enhanced Online Clients, we are happy to release the “Create Form Templates” feature in eDOCSignature. Your credit union now can upload a document and draw signatures, dates, and text boxes that your members are required to fill through the esign process.

This feature is very similar to the “Send Document” feature. Although now, you can save the document so it can be reused with out drawing the boxes each time.

For additional information on how to create a template -

https://edochelp.com/eDOCSignature/Setup_Templates/Set_Up_Templates.htm



Create Packages of Templates

Not only can you create new templates, with this release create a package of templates to send to a member. A credit card package would be a good example. You can bundle an application signing template, a disclosure template, and a requested template to get the members proof of income all in one easy click. You find this option next to “Set Up Templates” in eDOCSignature.

For additional information on how to create a package -

https://edochelp.com/eDOCSignature/Setup_Package_Types/Set_Up_Package_Types.htm

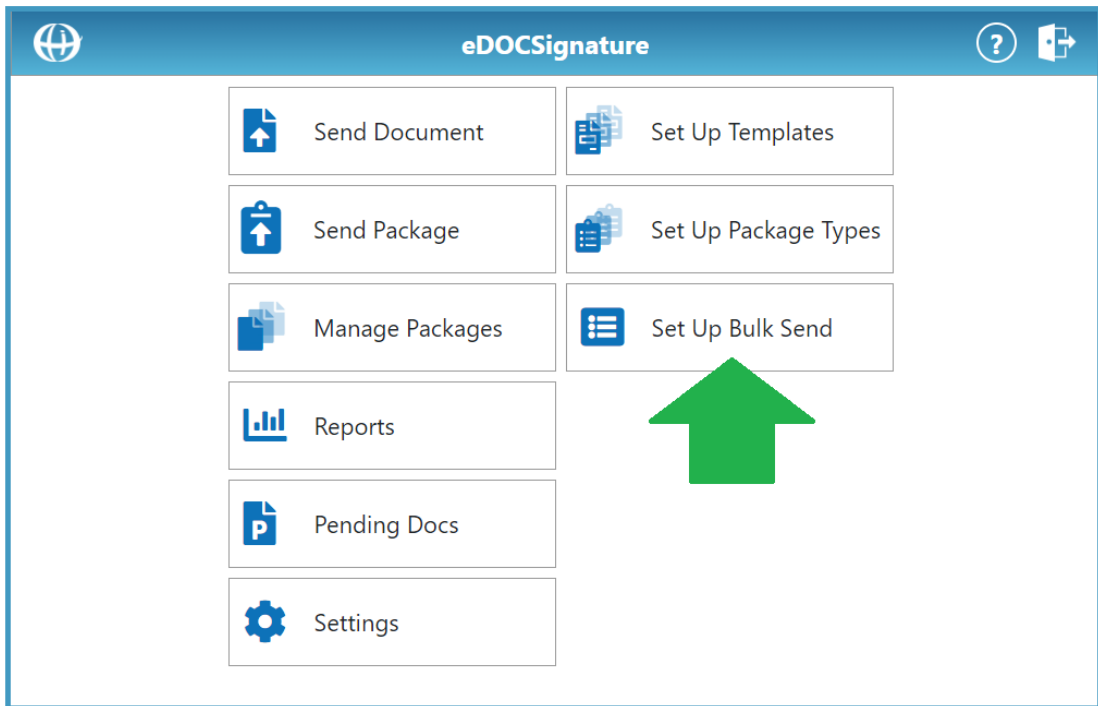


Bulk eSign

We are happy to introduce the way to bulk send an eSign Template a group of members. You can now create a Skip-A-Pay template, as an example, and send it to a list of members. This can be done from the eDOCSignature website.

For additional information on how to use the bulk send feature -

https://edochelp.com/eDOCSignature/Setup_Bulk_Send/Set_Up_Bulk_Send.htm



Xpress Teller



Photo ID Cleanup

With our New Xpress Teller Photo ID Cleanup tool, you can zoom, rotate, and crop an ID that may not have been originally saved properly. Once changes are made, a new copy of the ID is saved to iDOCVault and will be used the next time the ID is viewed.

Simply click “Edit” on the Xpress Photo ID Verify Screen. When the new Image Cleanup tool opens in your default browser, simply adjust the image so the ID is only visible. When complete click

The screenshot shows the Xpress Teller interface for account verification. The account number is 61907 and the user is Steve Sample. Personal details include birthdate (Apr 23, 1993), gender (M), and age (28). The drivers license number is D111 047 444 555 with code word "BUBBLES". An Oregon ID card is displayed, and an "Image Cleanup" tool is overlaid on it. The tool includes a zoom slider, rotate 90° and 5° options, and a crop tool. The ID card details are as follows:

Type	Comment
000	CLP: IND SCL/Dis 02
000	8/16/18 Reversed BP

Image Cleanup

Zoom: [Slider]

Rotate 90°: [Icons]

Rotate 5°: [Icons]

Crop: [Icon]

Buttons: Reset, Confirm

OREGON IDENTIFICATION CARD

USA

AL NO: A123478 LIMITED-TERM

1,2 BLENHEIM ROBERT RICHARD UNDER THE MARION STREET OVERPASS, RIGHT

SALEM, OR, 97301

4b EXP: 08/03/2016 13 SEX: M

4a ISS: 04/01/2016 16 HGT: 06'-03"

10 FIRST: ZL0000082 17 WT: 180 lb

5 DOB: 07/04/1975 14 EYES: BRO

9 CLASS: Not a License to Drive

12 REST: NONE

ProDOC



New ProDOC Installer

The Online Imaging ProDOC installer is getting updated to be fully unattended. That means no license agreements or clicking *Next*. This will allow for a faster installation process and the ability to run the installer remotely.

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.