

# 23.05

# Imaging Solutions Software Release

Beta	Online	In-House
3/27/2023	5/07/2023	05/07/2023

## What is this release?

This release is the 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 7th, 2023.

*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](mailto:imaging@cuanswers.com).*



**Enhanced Online/Online Clients:** Imaging Solutions will deploy your release on May 7th, 2023. Any added features can be purchased in the store at [store.cuanswers.com](http://store.cuanswers.com).

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## ProDOC

### My Signature

With the most recent update to ProDOC, your staff can now right-click on a signature box and add their signature without a signature pad making signing as credit union staff much easier! This can be used with signatures, initials, check boxes, and dates.

Simply “right-click” on a signature field and select “Complete by Current User”. This will add the ProDOC user full name, username, timestamp, and network MAC address.

Authorized Signature (Primary):  : 

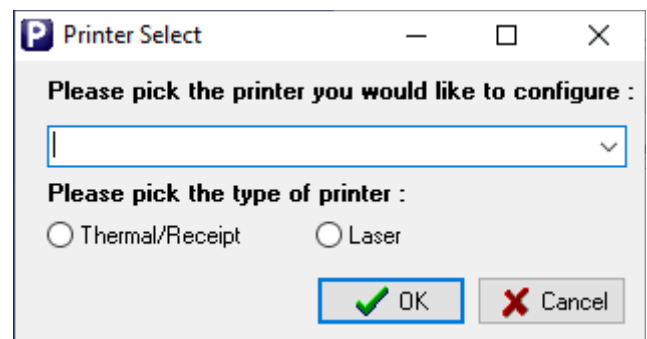
Authorized Signature (Joint):  :  Date: 

03/27/2023

**Please attach a voided check or deposit slip and return this form to the Payroll Department.**

### Printing Receipts to a Laser Printer

In the past, we have been unable to print receipts with a watermark on a laser printer. That has been corrected with this version of ProDOC. When setting up the receipt printer, there will be a prompt to select if you’re printing to a “Thermal/Receipt” or “Laser” printer.



## Request a Document

### Request a Document Directly from CU\*Base

Ever get to the point where you are ready to create a loan, only to find you are missing just one piece of documentation? Now it is even easier to request that proof of insurance or photo ID you are missing when you are completing a loan application. New buttons *built directly into the CU\*BASE LOS loan application screens* make it a snap to open a web interface, request the document via verified email or text message from the membership, and upload it for your records!

Simply click the new **Request a Doc** button on the *Loan Application: Personal Information* (shown above) or the *Employer Income* screens to launch the window below.

Request up to ten different documents and click **Send**. The member will receive a message or email with a link that will launch an interface like the one you use for eDOC Signature that will walk your member through the process of uploading the document. You even receive an email when the task is done so you know that it is waiting for you!

*In addition, View and Scan links already available on existing CU\*BASE screens are added to the same loan application screens. Use them to view and scan these loan documents your members just sent you! This feature will be activated when the release is implemented for Imaging clients. Not an Imaging client? You will be directed to the CU\*Answers store page when accessing this feature*  
<https://store.cuanswers.com/product/request-a-document/>

## iDocVAULT 2.0

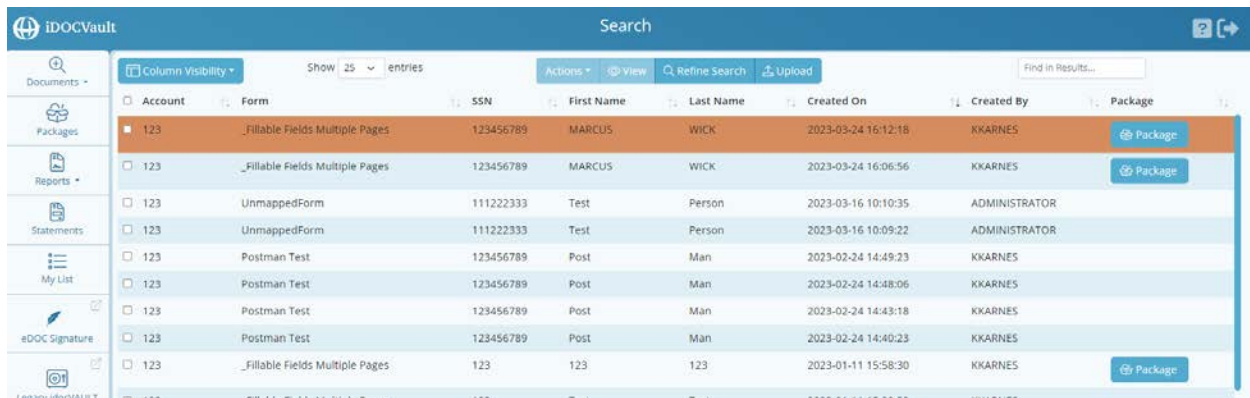
### iDocVAULT 2.0 (Active Beta)

We are happy to announce a new way to view documents, statements, and reports! iDocVAULT 2.0 will be released as an active beta and run alongside the current iDocVAULT to give everyone the chance to get comfortable and make their staff aware of the changes.

Viewing documents is easier than ever allowing new features like...

- Download a PDF or zip file of multiple selected documents.
- Add multiple documents to a list for easy viewing, printing, or downloading.
- When viewing a document and easily click and see the whole package in the browser.
- Create custom searches for your credit union or by user.
- Link to eDOCSignature.
- Combine statements for print and download.
- Ability to show/hide column visibility.

As part of the release, we will be placing a new iDocVAULT 2.0 Desktop shortcut allowing your staff to test using the new iDocVAULT.






The screenshot displays the iDocVAULT 2.0 web interface. At the top, there is a search bar and navigation options. Below, a table lists documents with columns for Account, Form, SSN, First Name, Last Name, Created On, Created By, and Package. The first two rows are highlighted in orange, indicating they are selected. A 'Package' button is visible next to each row.

Account	Form	SSN	First Name	Last Name	Created On	Created By	Package
123	_Fillable Fields Multiple Pages	123456789	MARCUS	WICK	2023-03-24 16:12:18	KKARNES	
123	_Fillable Fields Multiple Pages	123456789	MARCUS	WICK	2023-03-24 16:06:56	KKARNES	
123	UnmappedForm	111222333	Test	Person	2023-03-16 10:10:35	ADMINISTRATOR	
123	UnmappedForm	111222333	Test	Person	2023-03-16 10:09:22	ADMINISTRATOR	
123	Postman Test	123456789	Post	Man	2023-02-24 14:49:23	KKARNES	
123	Postman Test	123456789	Post	Man	2023-02-24 14:48:06	KKARNES	
123	Postman Test	123456789	Post	Man	2023-02-24 14:43:18	KKARNES	
123	Postman Test	123456789	Post	Man	2023-02-24 14:40:23	KKARNES	
123	_Fillable Fields Multiple Pages	123	123	123	2023-01-11 15:58:30	KKARNES	

For additional information please reference the iDocVAULT User Guide -

<https://edochelp.com/assets/docs/Documentation/iDocVault%20Guide%2003272023.pdf>

## Security Features

   Updates to MySQL and PHP  
Important security updates for MySQL and PHP.

## Software Versions

Below are the versions currently in use with this release:

<b>Product</b>	<b>New Version</b>
2020DOC	7.19.0.1
AutoImportCon	7.19.0.1
AutoRenamer	7.18.0.0
CentralizedSettings	1.1.2
Document Server	7.20.0.2
iDocVault 2.0	8.20.1.13
IS-API	1.2.2
Job Management Service	1.1.0.17
MySQLConfig	8.19.0.4
ProDOC	7.19.0.9
RAP	8.20.0.23
RAP_Doc	8.20.0.8
RAP_Pkg	8.20.0.3
RAP_Rpt	8.20.0.2
RAP_Sta	8.20.0.3
ReceiptsApp	1.0.0.12
RequestedDocs	1.1.10
RIP	8.21.0.0
Security Manager	7.20.0.0