

23.10


Imaging Solutions Software Release

Beta	Online	In-House
08/15/2023	10/08/2023	10/08/2023



What is this release?

The Imaging Solutions release is 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 for your system starting October 8th, 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.

  **Enhanced Online/Online Clients:** Imaging Solutions will deploy your release on October 8th, 2023. Any added features can be purchased in the store at store.cuanswers.com.

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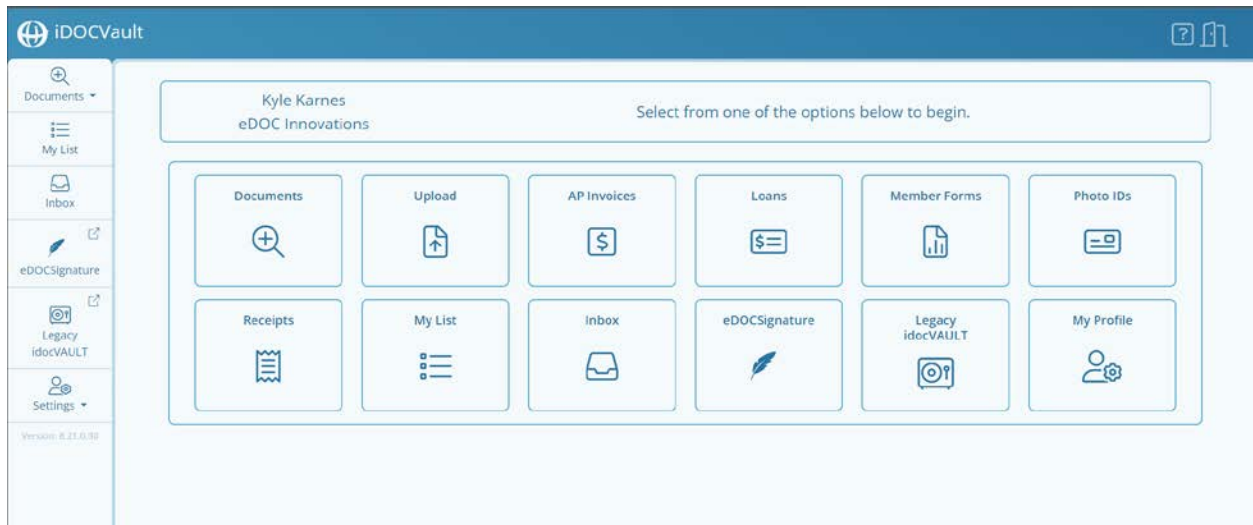
iDocVAULT

Official Release of iDocVAULT 2.0

Take advantage of the updated look and features of iDocVAULT. View documents easier and faster with its brand-new architecture. Also, take advantage of these features:

- Download a PDF or zip file of multiple selected documents.
- Add multiple documents to a list for easy viewing, printing, or downloading.
- Create custom searches for your credit union or by user.
- Link to eDOCSignature.
- Ability to show/hide column visibility.

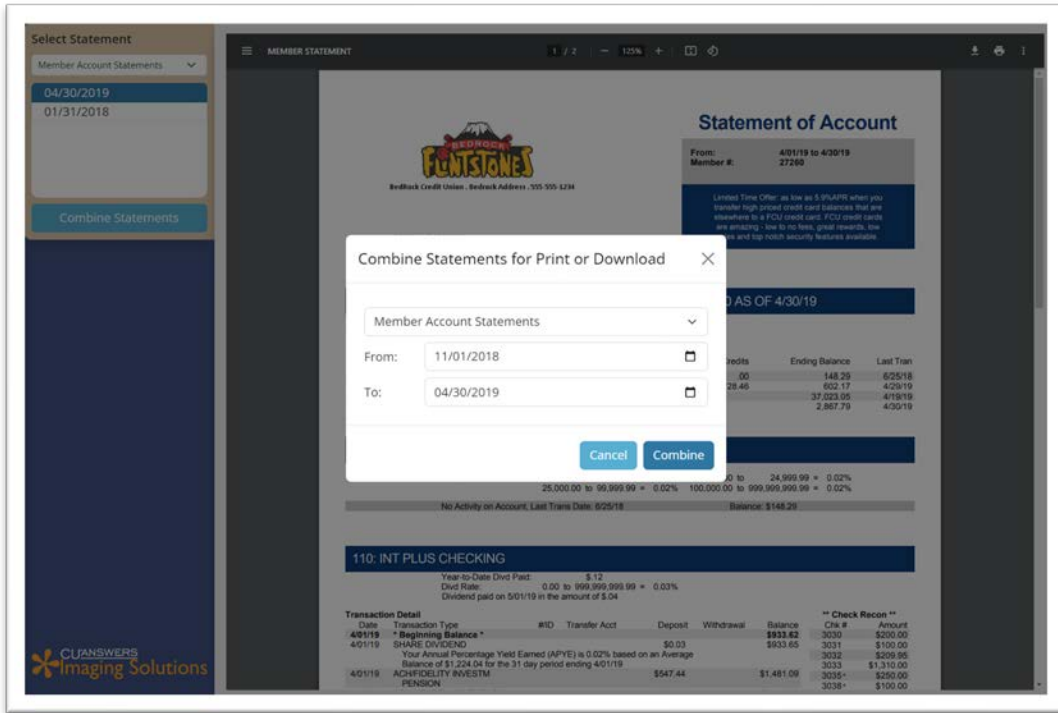
Help your staff get started with this user guide → [iDocVAULT Quick Help Guide](#)






CU*Spy Statements and Reports

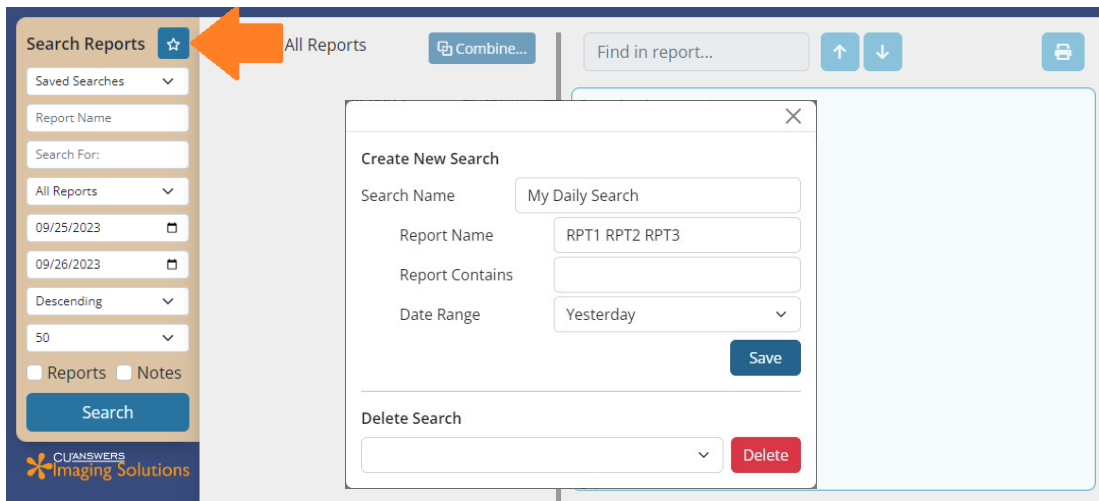
CU*Spy Statements – Combine Statements

CU*Spy Statements also got an update and the brand-new ability to combine statements. No need to select each statement and click print when printing multiple months. Now simply click the “Combine Statements” button, select your date range, and click Combine.



   CU*Spy Reports – Create Favorite Searches

CU*Spy Reports got a facelift and now supports creating your very own favorite searches. This is a great way to make searching your daily reports easier. To create your own custom search, click the star icon and following the instructions on the screen.



CU*Spy Reports – Supports Printing Inline Notes

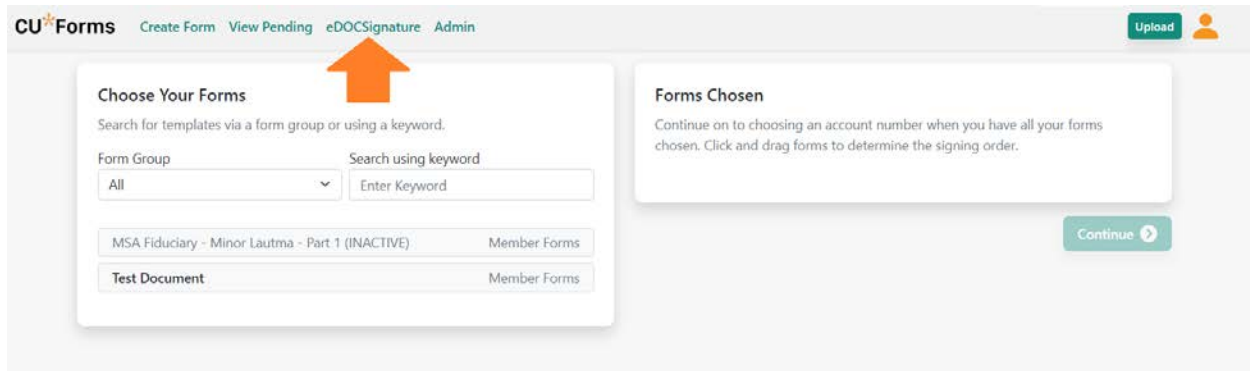
When combining reports to text or PDF, notes can be selected to print inline. This is great if you want your note reflected right where it was created. In the past, notes were printed on the last page.

29	41	442,457.54	10,791.04	2,716.30	66.30
30	66	490,570.25	7,432.88	3,024.23	45.82
31	1	4,141.97	4,141.97	20.83	20.83
33	43	305,349.01	7,101.13	1,440.51	33.50
34	37	316,399.57	8,551.33	978.14	26.43
35	38	254,955.39	6,709.35	1,831.33	48.19
36	54	456,611.24	8,455.76	2,509.75	46.47
37	94	681,122.42	7,245.98	5,872.85	62.47
38	67	539,390.68	8,050.60	2,129.78	31.78
40	35	306,684.38	8,762.41	1,402.63	40.07
NOTE: KYLEK () 10-02-2023					
306,684.38 was a transaction that needed be reversed due to an GL mistake					
41	28	211,476.72	7,552.74	1,297.69	46.34
42	33	290,218.21	8,794.49	1,015.25	30.76
43	21	166,906.20	7,947.91	533.63	25.41

CU*Forms

Jump to eDOCSignature

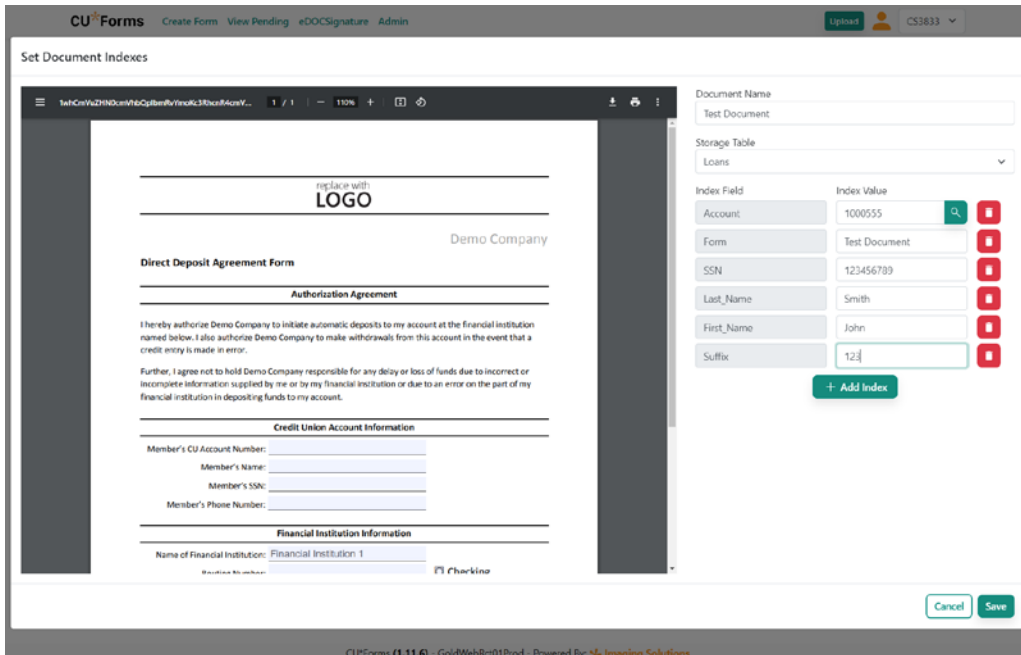
Users can now jump to eDOCSignature right from CU*Forms. Simply click “eDOCSignature” in the top menu and a new browser tab will open showing your current eDOCSignature packages.



The screenshot shows the CU*Forms application interface. At the top, there is a navigation bar with the following items: CU*Forms, Create Form, View Pending, eDOCSignature (highlighted with an orange arrow), and Admin. On the right side of the navigation bar, there is an 'Upload' button and a user profile icon. The main content area is divided into two panels. The left panel is titled 'Choose Your Forms' and contains a search bar with the text 'Search for templates via a form group or using a keyword.' Below the search bar, there is a 'Form Group' dropdown menu set to 'All' and a 'Search using keyword' input field with the placeholder text 'Enter Keyword'. Below these are two form templates listed: 'MSA Fiduciary - Minor Lautma - Part 1 (INACTIVE)' and 'Test Document', both categorized as 'Member Forms'. The right panel is titled 'Forms Chosen' and contains the text: 'Continue on to choosing an account number when you have all your forms chosen. Click and drag forms to determine the signing order.' At the bottom right of the right panel, there is a 'Continue' button with a right-pointing arrow.

Upload documents through CU*Forms

Upload supporting documents to your imaging archive right from CU*Forms. Click “Upload” in the header bar of CU*Forms and select the document you need to archive. It will prompt you to select a table and enter index information. If you know the account number, simply type it in the account field and click the magnifying glass. It will autofill the indexes with members information from CU*Base.



Native Receipts

Marketing Messages

Native Receipts now allows your credit union to insert marketing messages! Talk to your members in a whole new way with this feature. Insert pictures of your staff, suggestions for new products, news about local events, or QR codes taking them to your website. The power of this new feature is up to your credit union.



Sign up here → <https://store.cuanswers.com/product/native-receipts-marketing-messages/>

Learn more about Native Receipts here → <https://store.cuanswers.com/product/native-receipts/>

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:

Product	New Version
2020COLD	7.21.0.2
2020DOC	7.21.0.2
ArchiveISO	7.21.0.0
ArchiveJobControler	7.21.0.0
ArchiveViewer	7.21.0.0
AutoImportCon	7.21.0.1
AutoRenamer	7.21.0.1
CBR Processor	7.21.0.0
CentralizedSettings	1.1.7
CUForms	1.11.6
DFCViewer	7.21.0.0
Doclib	2.2.9.14
Document Server	7.21.0.2
EsignDoc	7.21.0.1
iDocLnk	7.21.0.1
iDocVault 2.0	8.21.0.30
Imaging API	1.5.1
IntelliSweep	7.21.0.6
IntelliSweepAdmin.exe	7.21.0.6
IS Adapter Service	1.2.1
IS-API	1.4.6
iSweep.exe	7.21.0.0

Product	New Version
iSweepAdmin.exe	7.21.0.0
Job Management Service	1.2.0
MVSBUploader	8.21.0.0
MySQLConfig	8.21.0.0
Native Receipts	1.1.0
ProDOC	7.21.0.7
RAP	8.21.0.14
RAP_CLM	8.21.0.1
RAP_Doc	8.22.0.1
RAP_IP	8.21.0.3
RAP_Pkg	8.21.0.3
RAP_RDC	8.21.0.3
RAP_Rpt	8.22.0.0
RAP_Sta	8.21.0.3
RequestedDocs	1.1.11
RIP	8.21.0.3
Security Manager	7.21.0.3
SrchLnk	8.21.0.0
Statements	7.21.0.2