

# 2.1

## Imaging Solutions Software Release

Beta	Online	In-House
July 13 <sup>th</sup> 2015	July 27 <sup>th</sup> & 28 <sup>th</sup> 2015	July 27 <sup>th</sup> - August 31 <sup>st</sup> 2015

### What is this release?

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This release is the 2015 summer release for online and in-house release managed clients. Some features may not apply to both. Refer to the symbols within the document for details.

### How do I get this release?

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**In-House Managed Clients:** Imaging Solutions will be contacting you to schedule the update of your system for this release.







**Online Clients:** Imaging Solutions will deploy your release on July 27th and 28th with some credit unions going each day. You will be notified of your day prior to the release.

If you have any questions please email us at [imaging@cuanswers.com](mailto:imaging@cuanswers.com).

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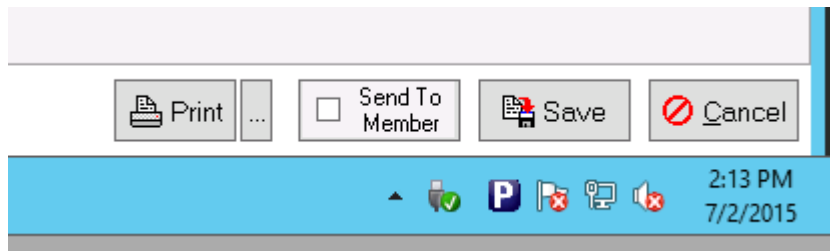
ProDOC

ProDOC is a user application that creates, captures, and scans documents, allows insertion of index data either automatically or manually, allows for document signing, and saves documents to the 2020iDOC system. Special features are available for processing receipts or forms. Forms also can be saved in a Pending status to be opened and worked on later or shared with other users. ProDOC also provides document-package management and electronic (web-based) signing functions.

  Send Receipts and Forms Directly from ProDOC to a Member's My Virtual StrongBox

My Virtual StrongBox allows members to save critical documents to an “online safe” that they access from a single sign-on link embedded directly in **It's Me 247** online banking. What has been missing is the ability for credit unions to print receipts and loan forms directly to this space.

This new feature allows a credit union to click a “Send to Member” button in ProDOC and send a receipt or form directly to a member's StrongBox, where the member can manage the retention of those documents. Much like retailers emailing receipts, you can now get in the document-transfer business with your member through this simple, secure transfer of documents.



This new feature puts your credit union in the document-transfer business! Now you can exchange documents with members by simply hitting a button in ProDOC to send any receipt or form to a member's Virtual StrongBox. Once there, they manage it, not you!

*Remember! CU\*Answers is paying for the standard version of My Virtual StrongBox for every credit union in the network, so there's no reason not to get started now!*

You can also sign up for the Premium version to get even more out of this relationship and even create a new revenue stream as members upgrade their storage space.

**In-house clients:** Any form or document you print to ProDOC such as membership forms can also be sent to the member's My Virtual StrongBox using this method.



More information on My Virtual StrongBox can be found on the web page devoted to this product. Check out <http://www.cuanswers.com/products/imaging-solutions/my-virtual-strongbox> for a brochure, case study document, and features list.



## New Indicator Makes It Easy to Sort for Just Your Members' Receipts

Currently when you search for a member's receipt by account number only, you may also find shared branch receipts with the same account number in the results.

Let's look at this example. Mary Member's account is 1234 with Local CU and Sam Shared has account number 1234 with Other CU. If Sam Shared uses the shared branching features from Local CU, it is currently possible for a teller to see both Mary's and Sam's receipts when searching for account 1234.

With this release we have added new shared branching indicators that will prevent a teller from accidentally viewing shared branch receipts when searching for a local account. Only the receipts of your members will be visible. Shared branch receipts will still be available to tellers by doing a search explicitly for shared branch receipts.

Following with the example shown above, if tellers from Mary Member's credit union search for account 1234, they will now only see Mary's receipts.

### How this works:

Starting with the 2.1 Imaging Solutions software release, we are adding a suffix to the account number on all shared branch receipts.

- *Example 1:* "CU-201/CE" would append "SB-201" to the member number
- *Example 2:* "CO-OP Shared Branching" would append "XX" to the member number

Now when you search for account number 1234, you would NOT also get account number 1234-SB-201 or 1234-XX.

*This new programming also disables shared branching for online viewing by members.*



## Sertifi eSign Integration Now Supported by ProDOC

Currently the only vendor integrated into ProDOC Packages for eSign is DocuSign.

With the 2.1 Imaging Solutions software release, we are adding the highly anticipated support for Sertifi eSign Integration. Packages users can now use the Sertifi eSign platform integrated into Packages.

If you currently use DocuSign, you may continue to do so without change. If you do not currently use eSign or are looking to make a change, Sertifi eSign integration is now available and may be a good option for you.



More information on Sertifi eSign can be found at <http://www.sertifi.com/>.

## eDOC eSignature

eDOC eSignature is a remote-signature product that integrates the solution right into the credit union workflow through ProDOC and ProDOC Packages. Documents can be flagged for signature and then sent and returned back into the archive without ever touching paper. With this product, in-branch or out-of-branch signatures can be captured.



### NEW! Sertifi eSign Integration with eDOC Signature

As mentioned in the “ProDOC” section previously, we are introducing Sertifi eSign integration with this release. *Refer to the “ProDOC” section of this document for more details.*



### Retrieve Status on Just One Selected Package

With this release we have added a new feature that decreases the amount of time it takes to refresh statuses for documents in a particular ProDOC Package. Now you have the added option to retrieve document statuses, recipient statuses, and tab statuses for a specific Package that you select versus refreshing statuses for all Packages by default.



### Native eDOC Innovations eSignature Solution for iPad Signing

Introducing a new eDOC eSignature iPad app from eDOC Innovations! This native electronic signing app uses ProDOC Packages to facilitate in-branch signing on iPads or remotely on iPads if used with the Member Document Portal. All you need to do is create the Package and make it available for signing, then access it via the app or Member Document Portal. The eDOC eSignature iPad app is available for download in the Apple App Store and designed for iOS devices. The eDOC eSignature web pages, however, can be accessed via other tablet devices or computers with signature capabilities (i.e. a mouse or touch screen).

Contact Imaging Solutions at [imaging@cuanswers.com](mailto:imaging@cuanswers.com) to learn more about the specific requirements of this feature. This feature is *only available for in-house clients*.

## Vault Manager

Vault Manager displays files and services requiring your attention so that you can monitor the flow of data to your eDocument vault.



### iSweep Update to Vault Manager Reporting

With this release, changes have been made to the reporting thresholds for Vault Manager. This means fewer warnings for inconsequential events so you can focus on what is important.

Online clients: As part of your online services, Imaging Solutions already monitors Vault Manager for information about your iSweep services.

## Staff Browser Interface

idocVAULT is a web-based viewer for retrieval of images, statements, and reports that are in your imaging system.



### idocVAULT Now Has Note Indicator When Viewing Reports

If a report has notes, a summary of notes and links to those notes are displayed at the top of the report. Summary of pages with notes at top of report and the links to the reports in the hit list results are highlighted.



### Support for Internet Explorer 11 and Safari iOS Web Browsers Now Included for iDOC Vault

With this release we have added support for the Internet Explorer 11 and Safari iOS web browsers.



### PHP Support Update for v5.4.41 Now Included for iDOC Vault

This release now supports the latest version 5.4.x of PHP.

If you are an in-house client and need help upgrading your PHP version, Contact Imaging Solutions at [imaging@cuanswers.com](mailto:imaging@cuanswers.com) for information about our Release Management services.

## Reports



### 2020COLD Reports Now Has Note Indicator When Viewing Reports

2020COLD Reports is a desktop application for organizing, searching, viewing, and annotating report documents.

New with this release is the note indicator feature when viewing reports online (via idocVAULT or 2020iDOC). *Refer to the “Staff Browser Interface” section for more details.*

## Database and User Management



### 2020DOC PDF Selection Setting Available

2020DOC is a desktop application that enables the creation, editing, storage, and retrieval of electronic documents in the eDOC system.

New with this release is a “PDFViewer” setting to allow selection between PDF viewers.

## Active Directory Integration



### Microsoft Active Directory Integration for Automatic User Authentication and Management

With this feature now users that you create in Active Directory and add to groups will be automatically authenticated and added to any groups in the below applications if a like named group exists.

New Microsoft Active Directory automatic user authentication for these applications:

- 2020COLD Reports
- 2020DOC

- iDOC Vault
- ProDOC
- Security Manager
- Statements