How To Install ProDoc (CU*Answers ASP)

Installing ProDoc for the CU*Answers ASP environment

INTRODUCTION

This booklet was created to assist CU*Answers clients with the installation of the ProDoc software within the CU*Answers ASP environment. This booklet is not intended for use by eDoc ASP, in-house, or FM/hosted environments.

CONTENTS

GETTING READY

WORKSTATION REQUIREMENTS

Please ensure that prior to the installation that you are logged into the workstation as a user with local administrator privileges. Without local administrator privileges you will not be able to install or configure the ASP Client version of ProDoc. To obtain administrator privileges, please contact your IT support provider.

> *What does "local administrator privileges" mean? Permissions are typically granted per user on workstations. The user must have the ability to install programs and modify files on the workstation to install ProDoc. The user does not need authority over the network (domain) to install the software.*

Make sure that the workstation meets the minimum hardware requirements for running CU*BASE GOLD and ProDoc, and that the workstation has network connectivity. Performance cannot be guaranteed on workstations that do not meet the minimum hardware requirements. If this workstation utilizes a signature pad or scanner, please ensure that there are ports available.

> *Unsure of what the latest hardware requirements for CU*BASE GOLD are? Visit the Best Practices webpage below to find out!*
>
> *http://cuanswers.com/client_pm_bp_network.php*

If any previous versions of the ProDoc are installed, it is strongly recommend that it be uninstalled before proceeding.

REQUIRED SOFTWARE

Adobe Acrobat Reader 8.0 or higher is required to utilize the iDoc Vault website. If you do not have Adobe Acrobat Reader 8.0 or higher, please visit http://www.adobe.com/ to download and install the latest version.

INSTALLING PRODOC

FINDING THE ISWEEP APPLIANCE

All software needed to install ProDoc and its components are available on the iSweep appliance. Every branch has an iSweep on-site. To find the installation software, you will need to browse to the iSweep appliance at your branch.

> *If you do not know the IP address or hostname of your iSweep appliance, please contact a member of the CU*Answers Network Services Team to obtain this information.*

To browse to your iSweep, click on the Windows "Start" button and type "\\" followed by the IP address of your iSweep into the "Search programs and files" text box. For instance, if the IP address of the iSweep is 10.150.0.69, you would type "\\10.150.0.69" (without quotes). Press enter.

Open the "RDI" directory, and then open the "RDI Installation" directory. This directory contains all the installation files needed to install and configure ProDoc.

INSTALL THE PRODOC APPLICATION

Double click on "1 – ProDoc Install.exe" to begin the installation.
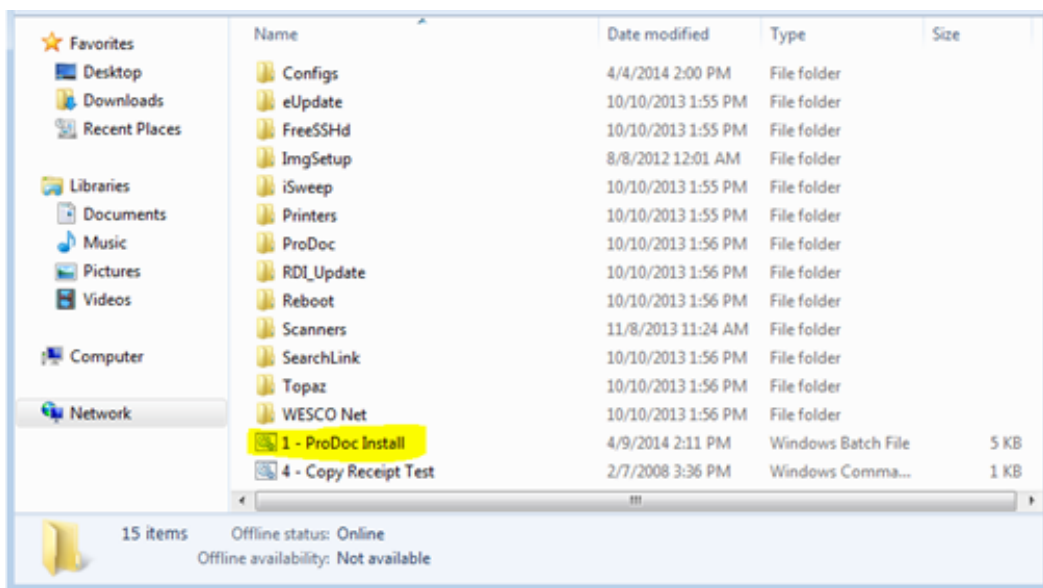

Click "Next" to begin the installation wizard. Accept the license agreement and click "Next."

Leave the information as-is for the "Company Name" and "Serial Number." Make sure that "Anyone who uses this computer" is selected and click "Next."

> *If the "Company Name" and "Serial Number" fields are blank, ensure that you are logged into the workstation with local administrative privileges and restart the setup program.*
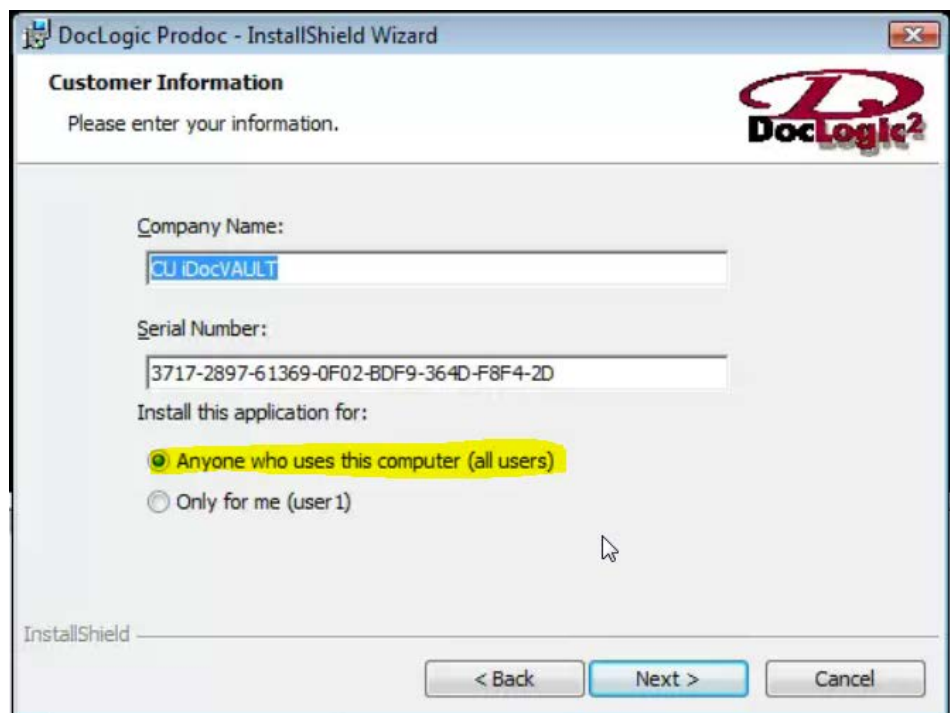
Leave all options on the "Network Location \ SQL Host" screen at their default settings. Click "Next."
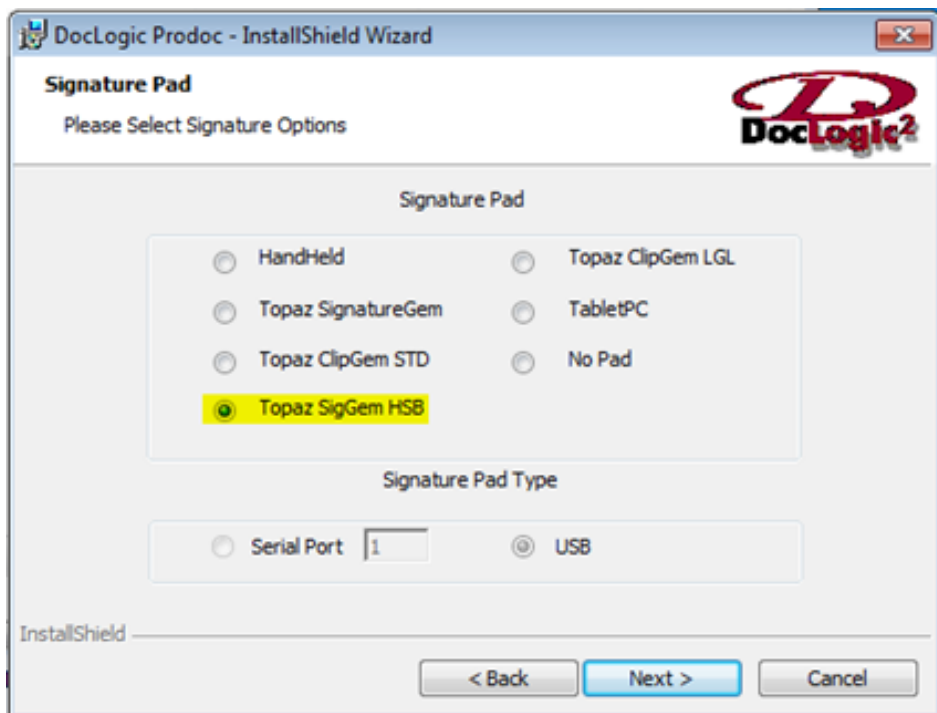
If this workstation has a signature pad attached, select "Topaz SigGem HSB." If this workstation does not have a signature pad, select "No Pad." Click "Next."

If the workstation is processing loans and your CU utilizes PCL loan form printing, you will need to check the "PCL Support" box and click "Next".
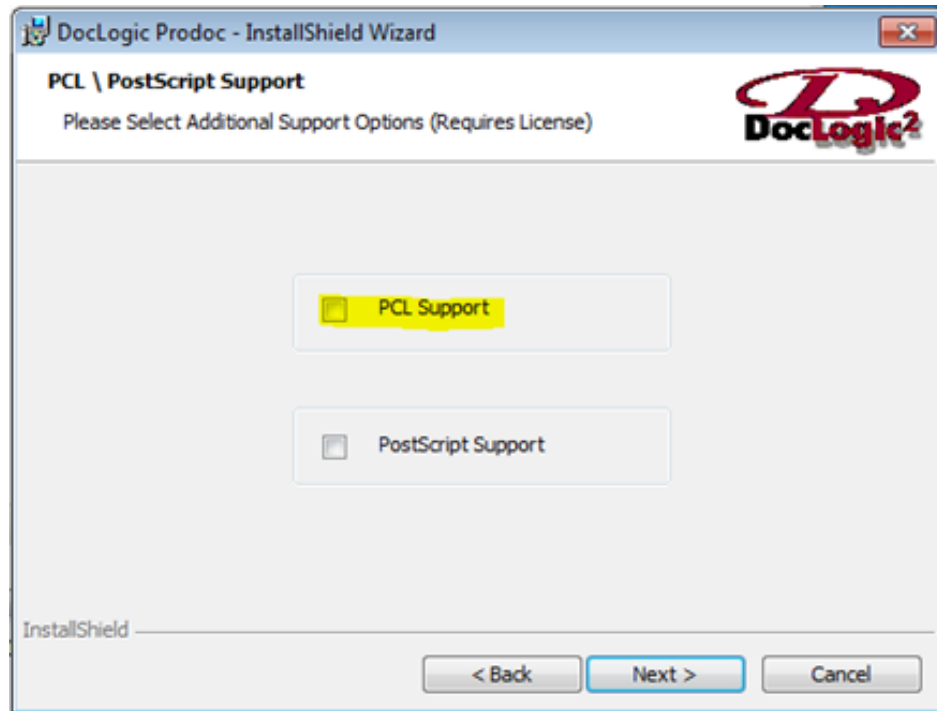
Click "Install." ProDoc will run through the installation. When prompted, click "Finish" to exit the wizard and return to the installation directory.
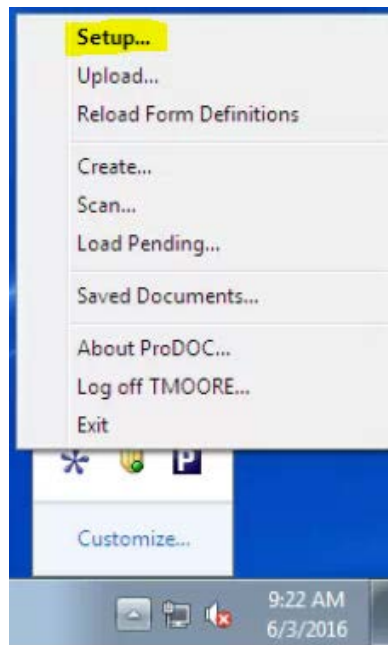
SETTING UP A RECEIPT PRINTER

INSTALLING A RECEIPT PRINTER

For assistance with installing printers, please refer to the documentation available at http://cuanswers.com/client_reference.php.

GENERAL PRODOC PRINTER SETTINGS

It is important to note that ProDoc selects printers based on the name of that printer. This is why it's important that the printer is named "RDI_Receipt" (case does not matter). If the receipt printer is not named "RDI_Receipt," printing issues may occur with ProDoc.

To configure a printer within ProDoc, make sure that ProDoc is signed in. Right-click the ProDoc icon in the system tray (near the time) and select "Setup."


Ensure that box for "Use Stored Settings When Printing" is selected. Click the "…" to the right of the "Receipts Printer" line.
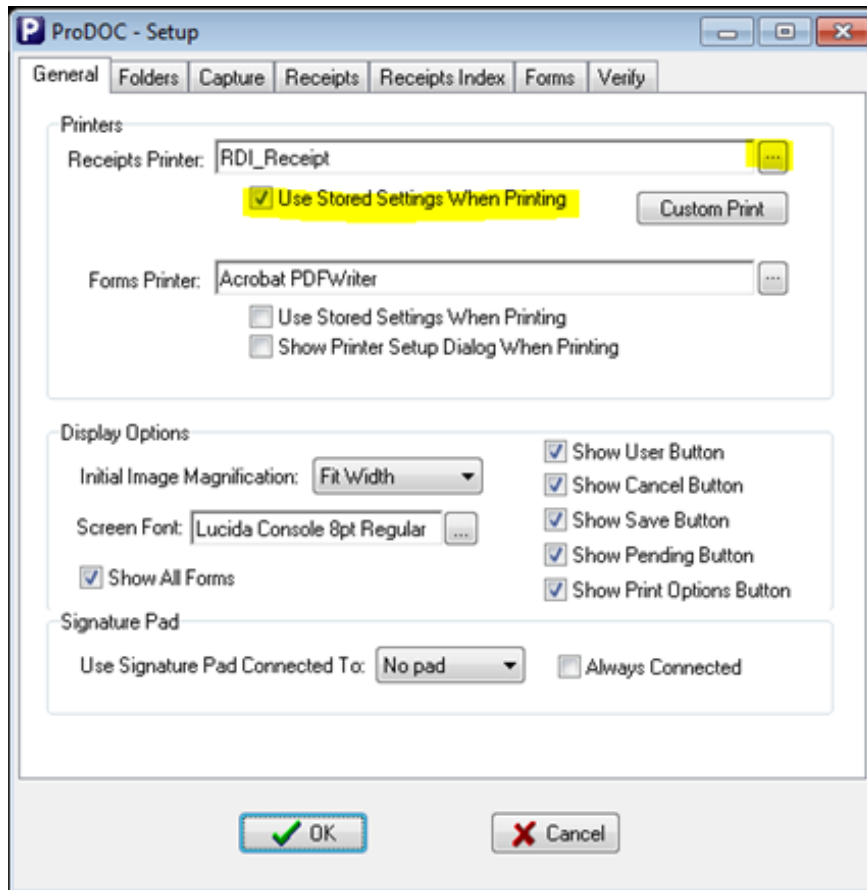
CARSWELL THERMAL PRINTER SETTINGS

If you are using an Epson thermal receipt printer with the Carswell module, first ensure that the "RDI_Receipt" printer is selected in the drop down at the top of the "Print Setup" window. Ensure that "Landscape" is selected, and that the "Source" is set to "Automatically Select." Click "OK" twice.
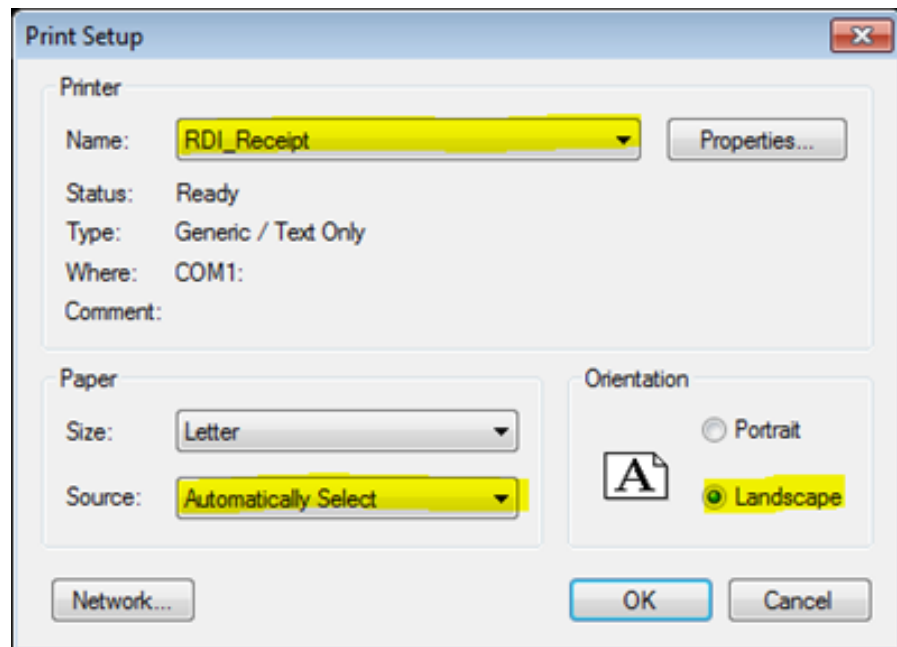
EPSON TM-T88IV (USB) SETTINGS

If you are using an Epson TM-T88IV thermal receipt printer with a USB connection, first ensure that the "RDI_Receipt" printer is selected in the drop down at the top of the "Print Setup" window. Ensure that "Landscape" is selected, that the "Size" is "80 x 297mm" and that the "Source" is set to "Form[Partial Cut]." Click "OK" twice.
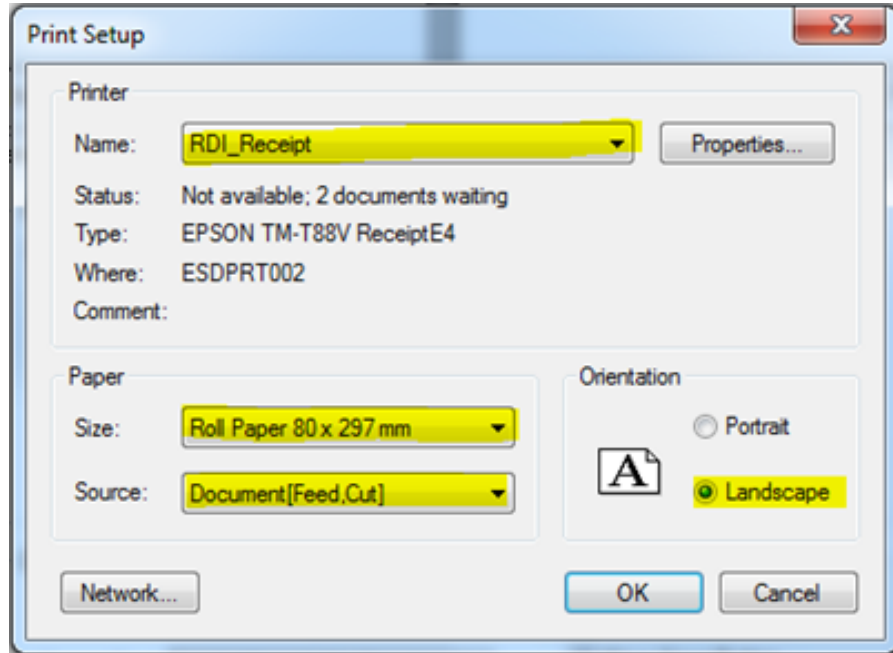
CREATING A PRINT SESSION

From your web browser, navigate to http://updates.cubase.org, select your credit union from the drop-down list, and click "Select!"
On the top-right under the "CU*BASE Tools" header, click "Create GOLD Printer".
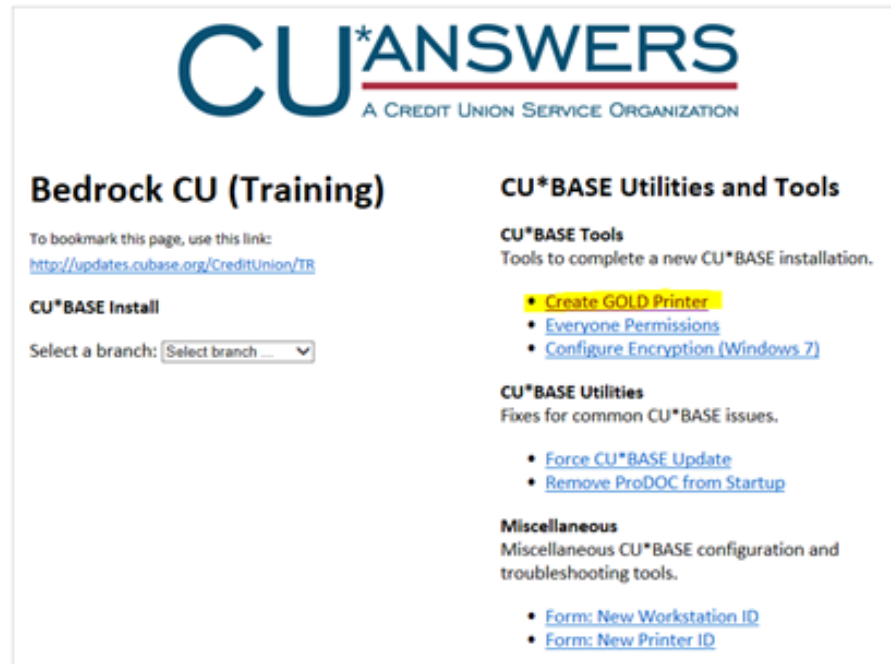
From the drop down list, select the print session type needed (See Below):
eReceipt will be "ProDoc Receipt (Program Files)"
eLoan will be "ProDoc Loan (Program Files)"
Check or General will be "Other Laser Printer"

Enter the GOLD ID of this workstations print session in the "Printer ID" field. "Click the Enable Session Encrption?" Box, Click "OK", then "Create."

SETTING UP A SIGNATURE PAD

INSTALL THE DRIVER

First make sure that the signature pad is not attached to the workstation. If it is, unplug it.
If the pad was connected during the installation of ProDoc, errors may occur. You will need to disconnect the pad, uninstall ProDoc, then reinstall ProDoc. Reconnect the pad after the installation has completed to reinstall the proper driver.

From the "RDI Installation" directory on the iSweep, browse to the "Topaz" directory. Run the sigplus 4.4.0.22.exe file. Select the correct model for your signature pad.

After the installation has completed, plug the Signature pad into the workstation. Windows will automatically finish installing the driver for the scanner.
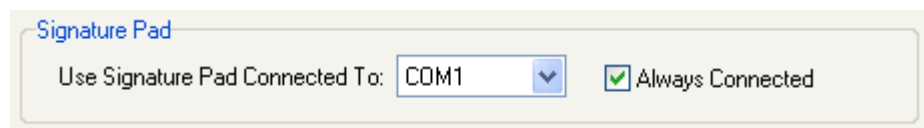
Configure Device

To configure ProDoc to use the pad, make sure that ProDoc is signed in. Right-click the ProDoc icon in the system tray (near the time) and select "Setup."
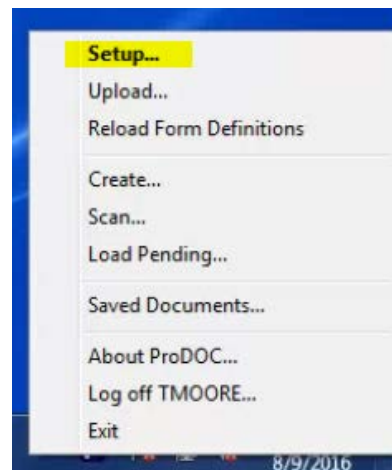
At the bottom of the "Setup" window is the "Signature Pad" section. Ensure that "COM1" is selected and that "Always Connected" is checked.

> *If you do not see the "Signature Pad" section in the setup, you do not have the proper authority within ProDoc. A ProDoc administrator will need to sign into ProDoc to change this setting.*

SETTING UP A SCANNER

INSTALL THE DRIVER

First make sure that the scanner is not attached to the workstation. If it is, unplug it.

From the "RDI Installation" directory on the iSweep, browse to the "Scanners" directory. Select the appropriate model and run the installation program. Use the defaults for the installation.

After the installation has completed, plug the scanner into the workstation. Windows will automatically finish installing the driver for the scanner.
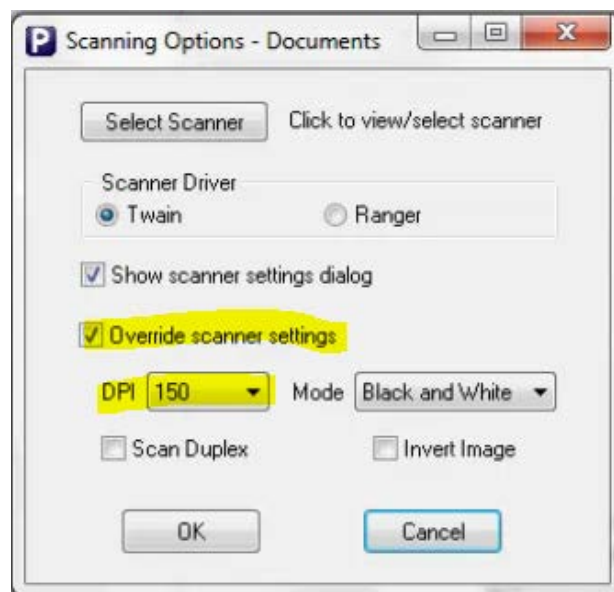
SELECT THE SCANNER

To use the scanner with ProDoc, first make sure that ProDoc is signed in. Right-click the ProDoc icon in the system tray (near the time) and select "Scan."
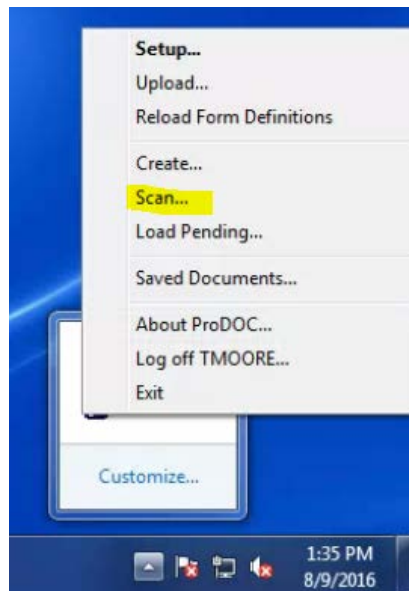
At the top of the scan window, click "Scan Options."
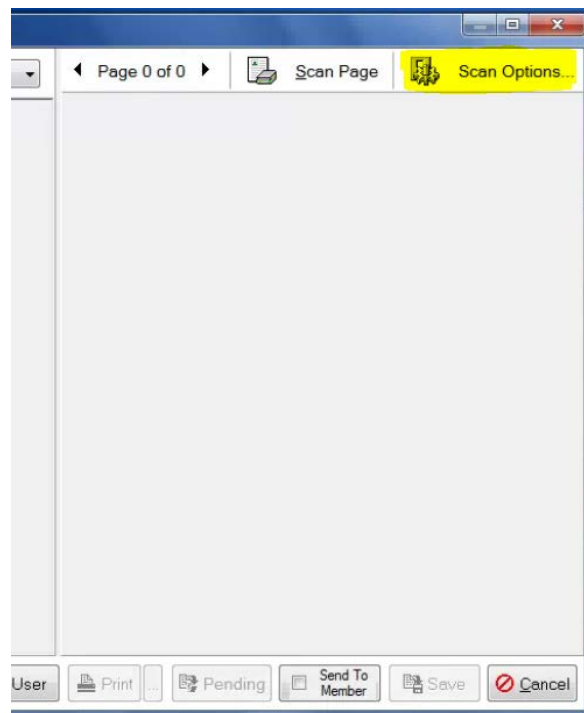
Ensure that "Override scanner settings" is checked and the "DPI" is set to "150." Click "Select scanner" then click "TwainPro."

Select the appropriate scanner from the list of available scanners. If you do not see your scanner listed, ensure that the scanner is plugged in and that driver installation completed successfully. Click "OK" twice to return to the scan window.

CALIBRATE THE SCANNER

The scanner came with a black and white sheet of cut paper. This paper is the calibration sheet and will be needed to calibrate the scanner.

The scanner will need to be calibrated once per installation. If the scanner is disconnected from a workstation then reconnected, it will need to be recalibrated again.

At the top of the scan window, click "Scan Page."

The screen that opens will vary based on the model scanner you have. Locate and click the "Calibrate" button. Feed the calibration sheet into the scanner with the black stripe facing down and the arrows facing into the scanner. Click the "Calibrate" button again to calibrate the device.

The calibration sheet will be pulled back and forth through the scanner several times. A confirmation of a successful calibration will appear on screen. Click "OK" until you are back to your desktop.

> *Unfortunately, due to the varying models of scanners available, we cannot provide exact instructions and screen shots for every model. Please refer to the documentation that came with your scanner for more in-depth instructions.*

WHAT NEXT?

CONGRATULATIONS!

You have successfully installed and configured ProDoc for the CU*Answers ASP environment!

If you have any issues after completing this document, please immediately contact a member of the CU*Answers Network Services Team for support. You can reach CU*Answers Network Services at 800-327-3478, option 3, or by email at helpdesk@cuanswers.com.

This document does not cover installation or configuration of related software or hardware, such as CU*BASE GOLD or thermal printers. Please refer to the "Docs And Information" pages at cuanswers.com for up-to-date documentation on these items.

> *Can't find the document you need? Contact the CU*Answers Client Services department or the CU*Answers Network Services Team for assistance.*