

iDocVAULT Quick Help Guide

The purpose of this document is to give a quick guide on how to use basic features of CU*Spy Images, CU*Spy Statements, and CU*Spy reports.

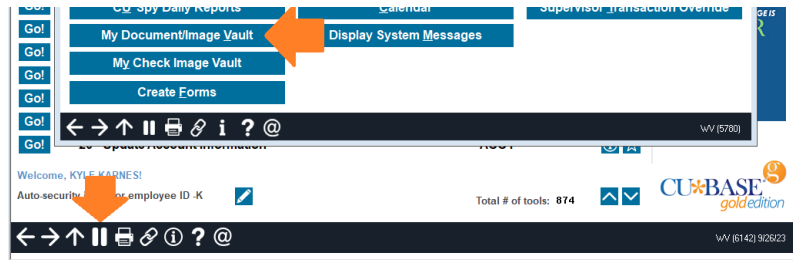
Table of Contents

CU*Spy Images.....	2
Manually Search for a Document.....	2
Search for a Documents using SmartLinks in CU*BASE	3
Document Actions.....	3
Navigation Panel	4
CU*Spy Reports.....	5
Search for Reports.....	5
Creating a Saved Search	6
Combining Reports.....	6
CU*Spy Statements.....	7
Searching Statements	7
Combining Statements.....	8

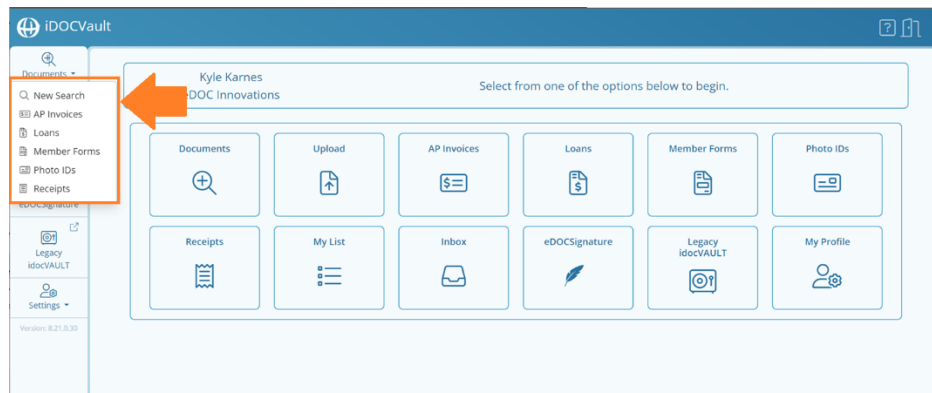
CU*Spy Images

Manually Search for a Document

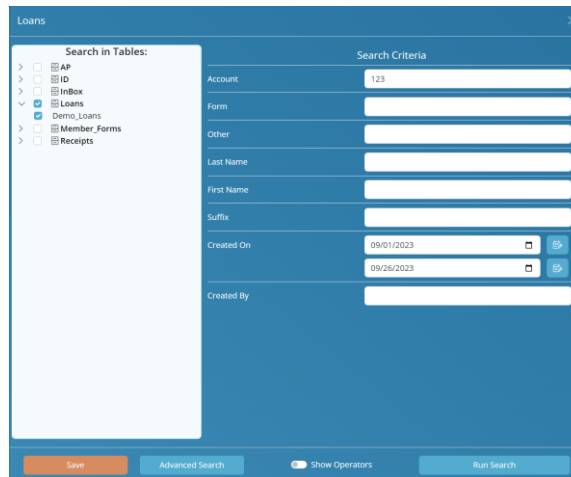
1. In the timeout menu in CU*BASE, click “My Document/Image Vault”



2. After iDocVAULT opens in your default browser, click “Documents” and select a premade search like “AP Invoices”, “Loans”, “Member Forms”, “Photo IDs”, or “Receipts”. You can also make your own search by selecting “New Search”



3. After selecting a search, enter your search criteria and click “Run Search”. In the example below, we typed “123” in the “Account” field. You can search for multiple items at the same time to further refine your search. An example would be account number “123” and Created On “09/01/2023 – 09/26/2023”.

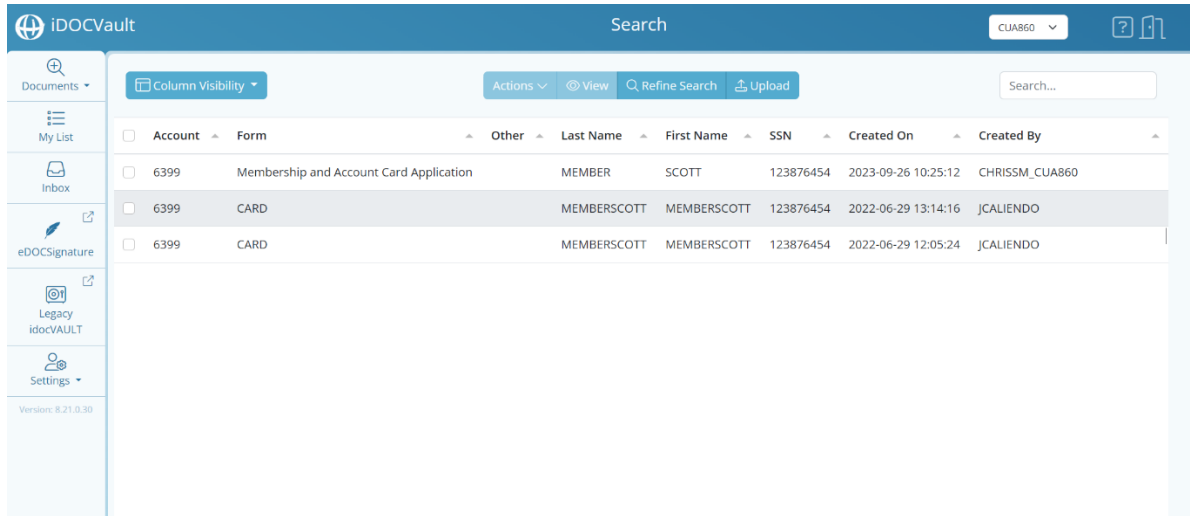


Search in Tables:	Search Criteria
<input type="checkbox"/> AP	Account: 123
<input type="checkbox"/> ID	Form:
<input type="checkbox"/> Inbox	Other:
<input checked="" type="checkbox"/> Loans	Last Name:
<input checked="" type="checkbox"/> Diemo_Loans	First Name:
<input type="checkbox"/> Member_Forms	Suffix:
<input type="checkbox"/> Receipts	Created On: 09/01/2023 - 09/26/2023
	Created By:

Search for a Documents using SmartLinks in CU*BASE

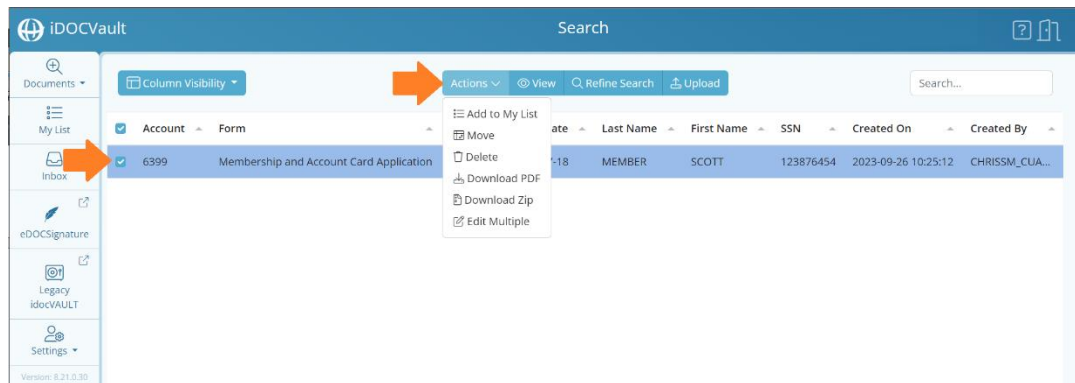
1. In CU*BASE, click the view “View e-Document” button from lending, membership, or accounts payable screens to launch iDocVAULT to view your documents.

This will automatically search for the documents requested. If you need to adjust your search, click “Refine Search” and enter new criteria or “Documents” and start a new search.



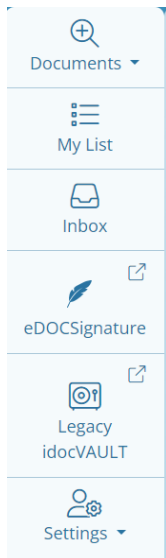
Document Actions

1. Select a document and click “Actions”



2. Users have the ability to complete the following actions if they have permissions.
 - Add to My List - Adds document(s) to My List.
 - Move - Moves document(s) to another table. (Admin required)
 - Delete - Deletes document form the system. (Admin required)
 - Download PDF / Download Zip - Download the document(s) into a single PDF or Zip file.
 - Edit Multiple - Edits multiple indexes for documents at the same time. (Admin required)

Navigation Panel



Documents button – Search for documents.

My List – Place searched document in a list to be downloaded or viewed at a later time.

Inbox – This is a location for all eDOCSignature documents sent for eSign that do not have tables or indexes associated to them. Documents here should be temporary.

eDOCSignature – Jump out to eDOCSignature to view documents sent for eSign.

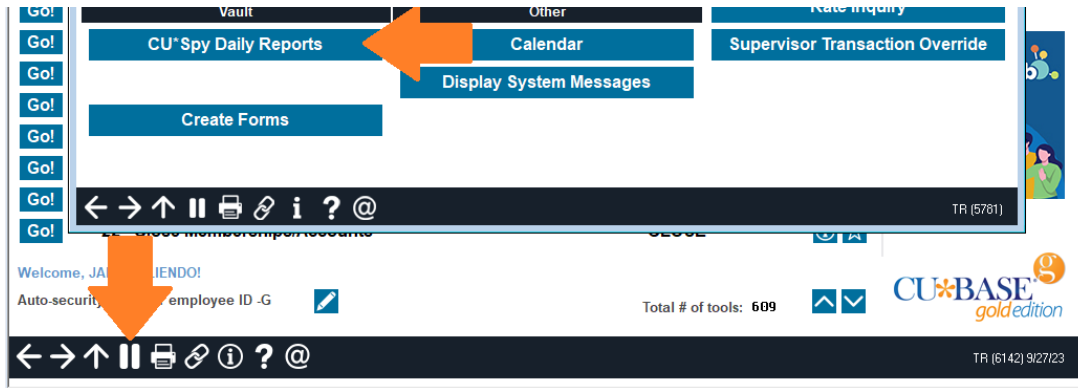
Legacy IdocVAULT – Open the previous vault and view documents.

Settings – Admin settings associated to the user.

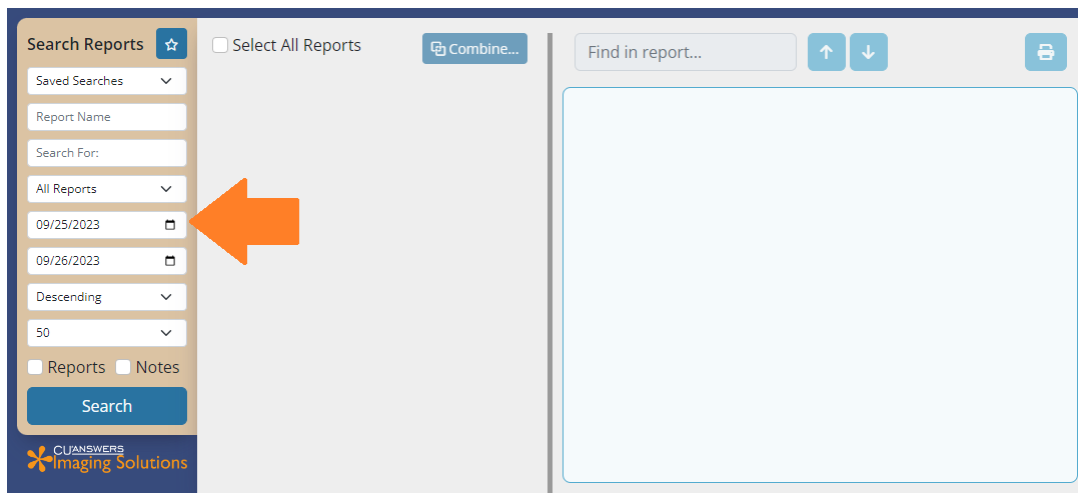
CU*Spy Reports

Search for Reports

1. In the timeout menu in CU*Base, click “CU*Spy Daily Reports”

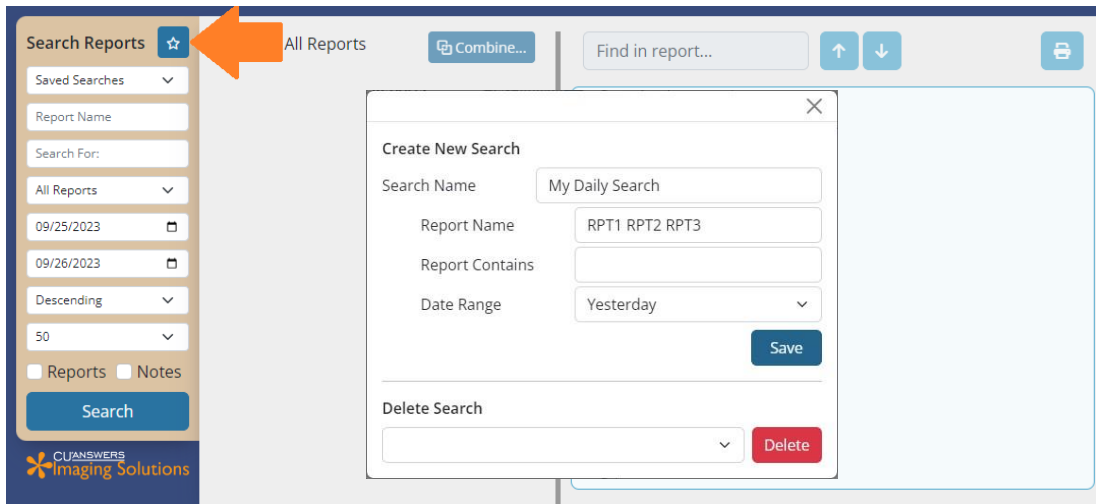


2. In the left-hand pane, enter the report name or text you want to search for. The “All Reports” drop-down can be used to filter by specific report categories. Set your date range and click “Search”.



Creating a Saved Search

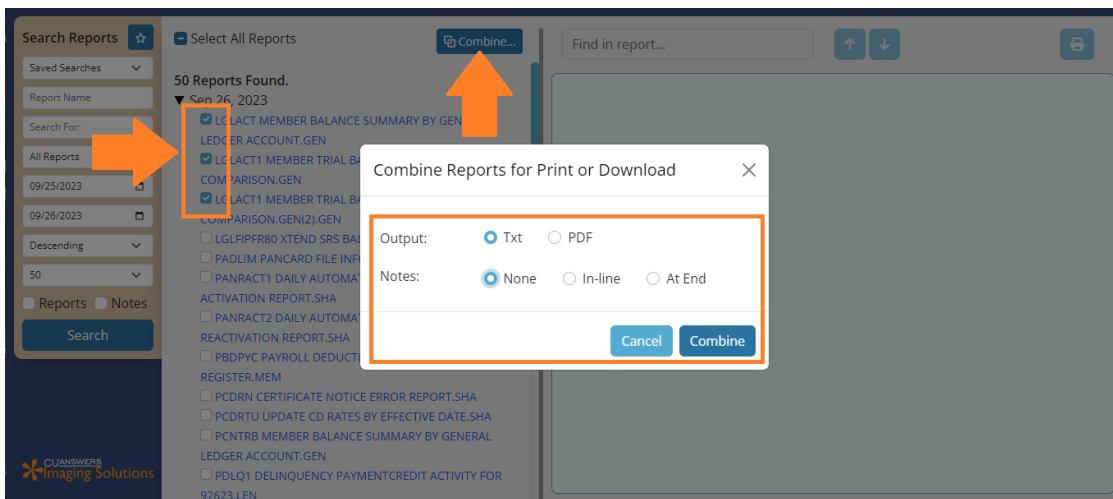
1. Click the star icon to bring up the Saved Search interface.



2. In the “Search Name” box, type the name you’d like to assign your search.
3. In the “Report Name” field, type the name/code for the report(s) you’d like to include in your saved search. For multiple report names, separate them by spaces. In this example, we’re searching for reports RPT1, RPT2, and RPT3.
4. In the “Report Contains” field, optionally enter text the report(s) contain.
5. Set your date range and click “Save”.
6. Your saved search will now be available to select from the main screen in the “Saved Searches” drop-down for future use.

Combining Reports

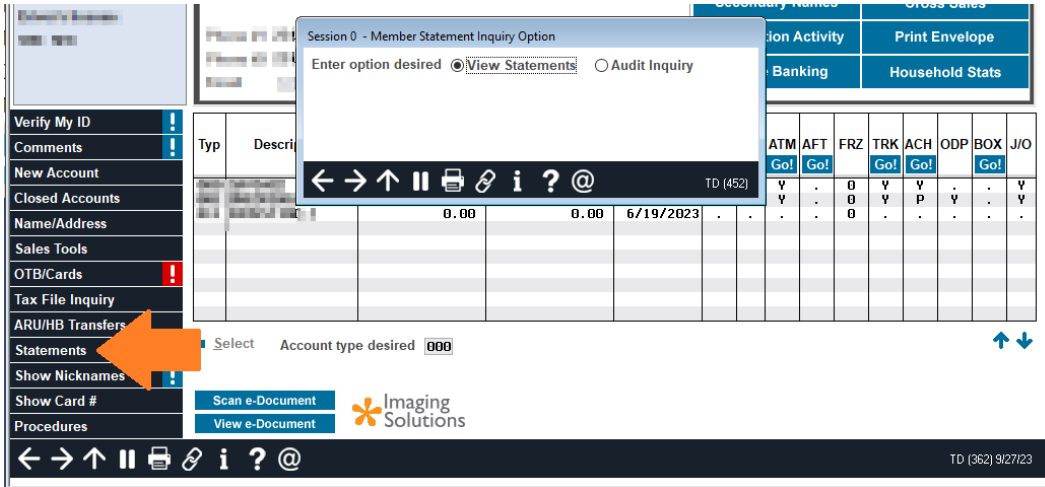
1. After performing a search, click the checkbox next to each report you’d like to combine.
2. Click the “Combine...” button to bring up the report combining interface.
3. Select if you’d like your combined report to be in text or PDF format.
4. If any notations have been made on the reports, select if and where you’d like them to display.



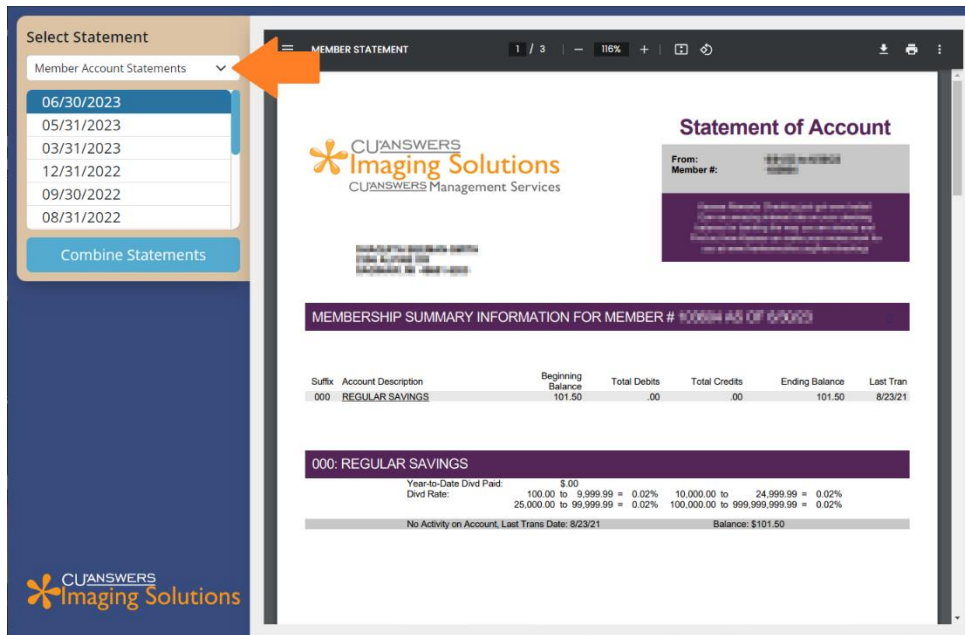
CU*Spy Statements

Searching Statements

1. In Member Inquiry in CU*BASE, click the “Statements” button along the left-hand column.
2. Press Enter when the menu pops up to select “View Statements”.



3. Select the type of statement you'd like to view from the drop-down menu.
4. All available dates for that statement type will populate in the scrollable list below. Click on a date to view the statement.



Combining Statements

1. From the main statements screen, click the “Combine Statements” button.
2. Select the type of statements you’d like to combine from the drop-down list.
3. Set your date range and click “Combine”.

