

# 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.

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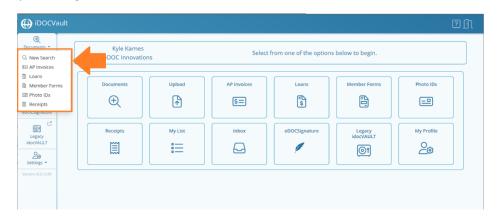
# CU\*Spy Images

### Manually Search for a Document

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

	CU Spy Daily Reports		Galenual	Supervisor Iransa	GEIS
Go!	My Document/Image <u>V</u> ault	ζ	Display System <u>M</u> essages		R
Go!	My Check Image Vault		-		
Go! Go!	Create <u>F</u> orms				
Go!	·→↑∥ 🖶 & i ?	@			WV (5780)
Go!					
Welcome, Ki Auto-security	remployee ID -K		Total # e	of tools: 874	CU*BASE
       	` 📙 🗗 🔗 🛈 ? @				WV (6142) 9/26/

2. After iDocVAULT opens in your default broswer, 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"



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".

Loans				
Search in Tables:			eria	
>	Account	123		
✓ ✓ ELoans ✓ Demo_Loans	Form			
> B Member_Forms > Receipts	Other			
	Last Name			
	First Name			
	Suffix			
	Created On	09/01/202	з 🗖	
		09/26/202	3 🗖	
	Created By			
Save Advance		Show Operators		



## 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.

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Documents •	6	Column Visibi	ility 👻	Actions ~	© View Q Re	fine Search 🗘 U	pload		Search	
Hy List		Account 🔺	Form	Other 🔺	Last Name 🔺	First Name 🔺	SSN 🔶	Created On 🔺	Created By	^
		6399	Membership and Account Card Application		MEMBER	SCOTT	123876454	2023-09-26 10:25:12	CHRISSM_CUA860	
		6399	CARD		MEMBERSCOTT	MEMBERSCOTT	123876454	2022-06-29 13:14:16	JCALIENDO	
eDOCSignature		6399	CARD		MEMBERSCOTT	MEMBERSCOTT	123876454	2022-06-29 12:05:24	JCALIENDO	
©1 []										
Legacy idocVAULT										
Settings -										
Version: 8.21.0.30										

#### **Document Actions**

1. Select a document and click "Actions"

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⊕ Documents ▼	Colun	nn Visibility 👻			Actions ∨ ⊚ Vie	±w Q1	Refine Search	£	Upload		Search.	
My List	Accou	int – Form			I Add to My List I Move	ate 🔺	Last Name		First Name 🔺	SSN 🔶	Created On 🗠	Created By 🔶
eDOCSignature	6399	Membe	rship and Account Card Ap	plication	Delete	-18	MEMBER		SCOTT	123876454	2023-09-26 10:25:12	CHRISSM_CUA,
Legacy idocVAULT												
Settings - Version: 8.21.0.30												

- 2. Users have the ability to complete the following actions if they haver permissions.
  - Add to My List Adds document(s) to My List.
  - Move Moves document(s) to another table. (Admin required)
  - o Delete Deletes document form the system. (Admin required)
  - Download PDF / Download Zip Download the document(s) into a single PDF or Zip file.
  - o 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"

GO!	Vault	Other		Nate inq	uny	
Go!	CU*Spy Daily Reports 🛛 ┥	Calendar	Supervis	sor Transa	ction Override	₹
Go!		Display System Messages				<b>D</b> •
Go!	Create Forms					
Go!	Citate Forma					
Go!						
Go!	←→↑ II 🖶 & i ? @				TR (5781)	
Go!		0200	-			
Welcom Auto-sec		Total #	of tools: 609	<u>~</u> ~	CU*BAS	E <sup>9</sup> edition
$\leftrightarrow$	·↑ II 🖶 & û ? @				TR (614	2) 9/27/23

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".

Search Reports 😭	Select All Reports @ Combine	e Find in report	↑ <b>↓</b>	8
Saved Searches 🗸 🗸				
Report Name				
Search For:				
All Reports 🗸				
09/25/2023				
09/26/2023				
Descending 🗸				
50 🗸				
🗌 Reports 📄 Notes				
Search				



### Creating a Saved Search

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

Search Report	s 😭	All Reports	G Combine	Find in	report		V	8
Saved Searches	~	<b>•</b>	r					
Report Name						×		
Search For:			Create New Search					
All Reports	~		Search Name	My Daily Searc	h			
09/25/2023			Report Name	RPT1 RPT	2 RPT3			
09/26/2023			Report Contains					
Descending	~		Date Range	Yesterday	4	~		
50	~					Save		
Reports	Notes							
Search			Delete Search					
CUANSWERS Imaging So	lutions				~	Delete		

- 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.

Search Reports 😭	Select All Reports  Find in report  Find in report
Saved Searches 🗸 🗸	50 Reports Found.
Report Name	▼ Sen 26, 2023
Search For:	C LC LACT MEMBER BALANCE SUMMARY BY GEN
All Reports	LE LACTI MEMBER TRIAL BI Combine Reports for Print or Download
09/25/2023 1	COM ARISON.GEN
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50 🗸	PANERAD FLE INF
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Search	REACTIVATION REPORT.SHA
	PBDPVC PAYROLL DEDUCT
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	PCNTRB MEMBER BALANCE SUMMARY BY GENERAL
CU'ANSWERS	LEDGER ACCOUNT.GEN
Kelmaging Solutions	PDLQ1 DELINQUENCY PAYMENTCREDIT ACTIVITY FOR     92623.LEN



# 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".

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1000 1000	Session 0 - Member Statement Inquiry Option	ion Activity	Print Envelope
	Enter option desired  View Statements  Audit Inquiry	Banking	Household Stats
Verify My ID	Typ Descri		
New Account	с с с с с с с с с с с с с с с с с с с	Go! Go!	Go!         Go!           Y         Y         Y         Y
Closed Accounts	Construction of the Constr	Ý . 0	Y P Y . Y
Name/Address	0.00 0.00 6/19/2023	0	· · · · ·
Sales Tools			
OTB/Cards			
Tax File Inquiry			
ARU/HB Transfers			
Statements	Select Account type desired 000		<b>↑</b> ↓
Show Nicknames			
Show Card #	Scan e-Document Honging		
Procedures	View e-Document 7 Solutions		
← → ↑ Ⅱ 🖶	'i?@		TD (362) 9/27/23

- 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.

Select Statement		1/3 – 1	6% +   [	I め		± 6	
Member Account Statements							
06/30/2023							
05/31/2023				Stateme	nt of Acco	ount	- 88
03/31/2023		lutions		rom:	STORN STREET		- 88
12/31/2022	CUANSWERS Manager	iucions	м	lember #:	expedit		- 88
09/30/2022	CO <u>ARGNERS</u> Planager	nent services		Verse Streets	Continued at some		- 12
08/31/2022				-			
Combine Statements	Table Science (10) Table Science (10) TableScience (10)			Station in the second second			н
	Suffix Account Description	Balance	Total Debits	Total Credits	Ending Balance	Last Tran	
	000 REGULAR SAVINGS	101.50	.00	.00	101.50	8/23/21	
	000: REGULAR SAVINGS Year-to-Date Dive				1		L
	Divd Rate:	100.00 to 9,999.9 25,000.00 to 99,999.9	9 = 0.02% 1 9 = 0.02% 10	10,000.00 to 2 00,000.00 to 999,99	4,999.99 = 0.02% 9,999.99 = 0.02%		
1	No Activity on Acc	ount, Last Trans Date: 8/23/21		Balance: \$1	01.50		
CUANSWERS Imaging Solutions							Ŧ
	4 June 200						



# **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".

Select Statement	≡ MEMBER STATEMENT 1 / 3   - 116% + 1 5 Ø) ± 🖶 :
Member Account Statements 🗸 🗸	
06/30/2023	
05/31/2023	ment of Account
03/31/2023	Combine Statements for Print or Download X
12/31/2022	100
09/30/2022	Rewards Checking just got even better!
08/31/2022	Member Account Statements
Combine Statements	From: 01/01/2023
	To: 06/30/2023
	Cancel Combine adits Ending Balance Last Tran
Himaging Solutions	000: REGULAR SAVINGS Year-to-Date Divid Paid: \$00 Divid Rate: 100.00 b 9.999.99 = 0.02% 10.000.00 b 24,999.99 = 0.02% +