



# ProDOC<sup>TM</sup>

## User Guide



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## TRADEMARKS

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## PRODUCT OVERVIEW

Welcome to ProDOC, eDOC Innovations' workflow management system that automates the capture of an institution's documents. ProDOC is eDOC Innovations' solution to capture, scan, create and save documents that are then stored in the DocLogic database. ProDOC is intended for teller-line or point-of-sale applications and includes features that automatically extract index data from captured files and allows data entered to be added to the document image. Using an electronic signature pad, customer signatures can be applied to the document and the document can be printed using either the original file from a processing system or the image generated within ProDOC.

**ProDOC Receipts** is an integrated document capture solution. It works as a stand-alone module or can be Packaged with ProDOC Forms.

**ProDOC Forms**, also available as a stand-alone module, allows for the design and capture of institution-specific fillable and signable forms.

**ProDOC Packages** creates institution-specific virtual file cabinets and verifies that all documents within the workflow are fully present and compliant prior to completion. ProDOC Forms is a prerequisite for ProDOC Packages.

**eDOCsSignature** send documents electronically for remote signature, making the electronic paperless documentation process faster and easier. eDOC Signature requires ProDOC Forms and ProDOC Packages.

## SIGN IN

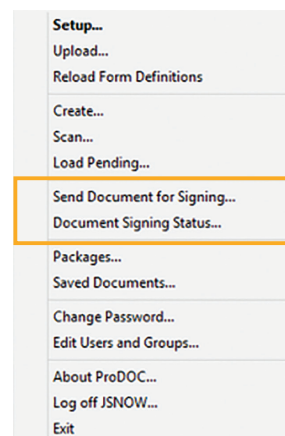
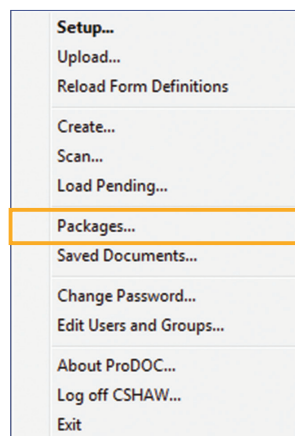
If using the Microsoft Active Directory service, the program will automatically launch. Otherwise, click on the **P** icon to launch the program. Sign in with user name and password.

## MAIN MENU

When signed into ProDOC, this **P** icon appears in the lower right-hand corner system tray where the time and date appear.

Right-click the ProDOC icon to access the ProDOC main menu. The pop-up menu displays ProDOC's function abilities. All of these options may not be available when a user signs in as these options are dependent on the purchased modules and the individual user permissions. If any option is not visual (grayed out), the user does not have the privileges for that function.

**If using eDOCsSignature with ProDOC**, you will now have two extra submenu options, **Send Document for Signing**, and **Document Signing Status**. If using eDOCsSignature with ProDOC, see section **Initiating eDOCsSignature**, page 18, and **Accessing Returned Signed and Completed Documents** page 22. See the complete eDOCsSignature Remote Signing Manual in the ProDOC section in our Client Center.



## MAIN MENU OVERVIEW

**Setup** allows the configuration of ProDOC.

**Upload** checks the backup folder for any files and uploads those files to the holding area.

**Reload Form Definitions** reloads settings and form definitions from the central ProDOC.def file. This function is used after editing form definitions to refresh the local copy of form information without restarting ProDOC.

**Create** produces a document using a stored template.

**Scan** creates a document by scanning pages.

**Load Pending** loads a document stored in one of the pending areas.

**Packages** opens the Package Manager to view the status of packages and associated documents.

**Saved Documents** opens the View Saved Documents window which allows the user to view and print saved documents for the previous seven days on the computer the documents were created on.

**Change Password** allows the logged in user to change their password.

**Users and Groups** are administrative tasks that allow for the edit of available permissions to users and groups.

**About ProDOC** displays the ProDOC splash screen which includes License Name, Expiration Date, Product Version and Compile Date. This information is needed when making a support call to eDOC Innovations.

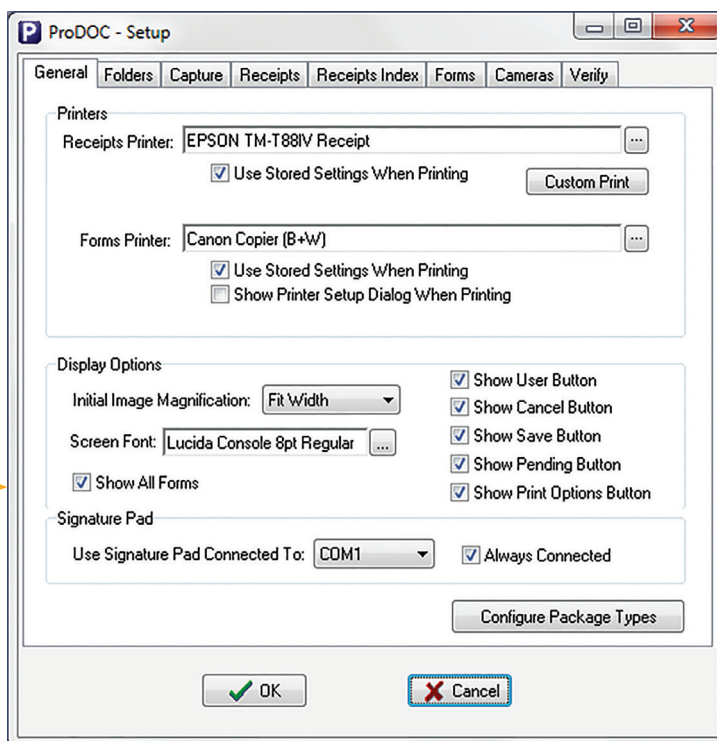
**Log off [current user]** logs-off current user and opens the login window for a new user to login.

**Exit** closes ProDOC. eDOC Innovations recommends exiting the application every evening before logging off the computer.

### Setup

Clicking on **Setup** from the Main Menu will open the Setup window. The setup button allows for the configuration of ProDOC. This screen may show additional tabs which will depend on the user's permissions - but it always will show a **General tab**. If additional tabs are available, refer to the **ProDOC Administrator Guide** to learn more about those tabs.

**Show All Forms** allows all users to select any form regardless of what is included in their Effective Permissions.



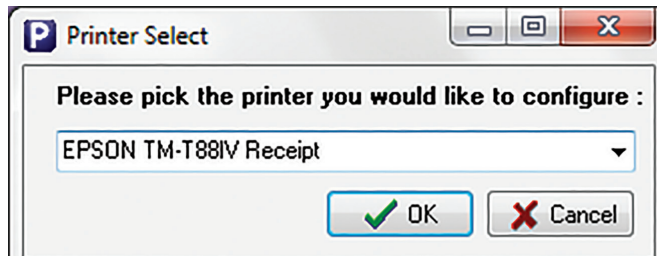
**Use Stored Settings When Printing** uses previously saved setting for printing. Clicking **Custom Print** opens the **Custom Print Commands** window (and will toggle back to Standard Print). Refer to the Administrator Guide for more on this option.

**Show Printer Setup Dialog When Printing** displays Print Setup window upon printing.

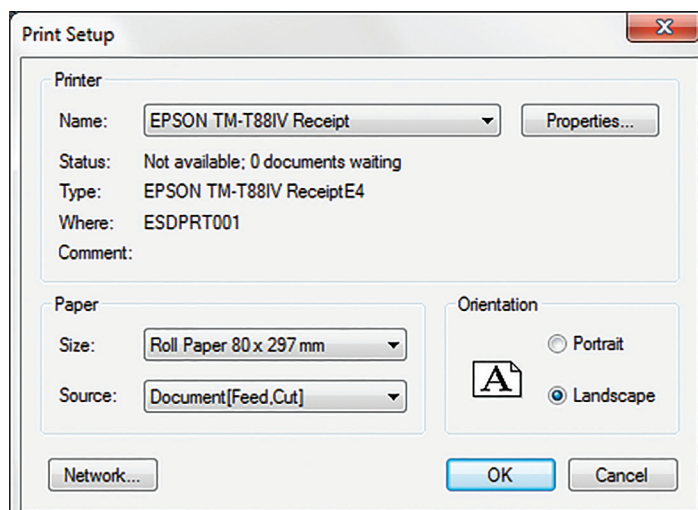
The **Show... Buttons** are set by an administrator. Refer to the administrator before changing any of these settings.

## General Tab

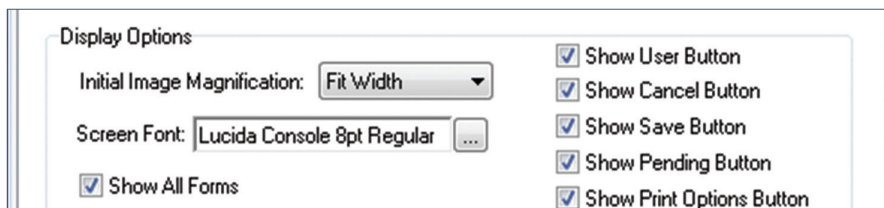
The **General tab** is where users can configure the receipt and form printers that documents will physically print to. Clicking on the Receipts and/or Forms **Printer ellipsis button** will display the dropdown where a user can choose any printer that is installed on their computer.



Select the printer. The **Print Setup** window will open to allow a user to set up additional information, such as paper size, source, and orientation. Click **OK** to store these settings.



The **Display Options** change the look of the receipt. If any of the **Show... Buttons** are not checked, these options will not be available for use. The **Screen Font** option will change the look and size of the font in the document. These options are set by the administrator. Refer to the administrator before changing any of these settings.



If a **Signature Pad** is connected to the computer, more often than not, it will be set to **COM1** from the dropdown box and the **Always Connected** box will be checked. If a signature pad is not connected to the computer, the **Use Signature Pad Connected To:** will be set to **No pad**.

The image shows two examples of the 'Signature Pad' configuration window. In the first, the dropdown menu is set to 'COM1' and the 'Always Connected' checkbox is checked. In the second, the dropdown menu is set to 'No pad' and the 'Always Connected' checkbox is unchecked.

**Configure Package Types** is an interface that makes changes to packages and is an administrative task. For more information refer to the **ProDOC Administrator Guide**.

A rectangular button with the text 'Configure Package Types' centered on it.

### Upload

**Upload** checks ProDOC's backup system on the computer to see if any files are there. If files are there, **Upload** will send them to the server. Upload is for instances where network activity has been dropped or the user has worked off line. ProDOC will send the item for processing once the Upload button has been selected or ProDOC is exited. When files are uploading, a progress bar will display indicating the status of the files.

### Reload Form Definitions

**Reload Form Definitions** reloads the settings on the computer from the central ProDOC .def file on the server, which houses every configuration and setting for every form. **Reload Form Definitions** refreshes the local copy of files without restarting ProDOC. The administrator will advise when to perform this function.

### Create

Create produces a document using a stored template. Clicking on **Create** opens the **Document Selector** window where users can pick a document from the configured forms (unique to their institution).

The 'Document Selector' dialog box contains the following elements:
 

- Label: 'Print data received. Choose form type:'
- Form type dropdown: 'Receipt' (with a close 'x' button and a dropdown arrow)
- Label: 'Package:'
- Package dropdown: 'NEW PACKAGE 2021-05-05 143557ADC9' (with a close 'x' button and a dropdown arrow)
- Section: **Time Frame**
  - Radio buttons:  120 Days,  No Limit
- Section: **Users**
  - Radio buttons:  Current User,  All
- Buttons: 'OK' and 'Cancel'

### Scan

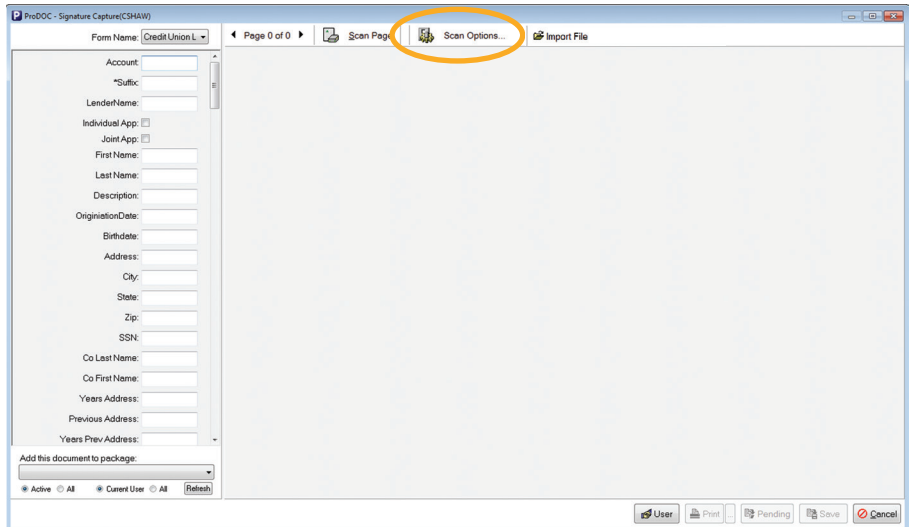
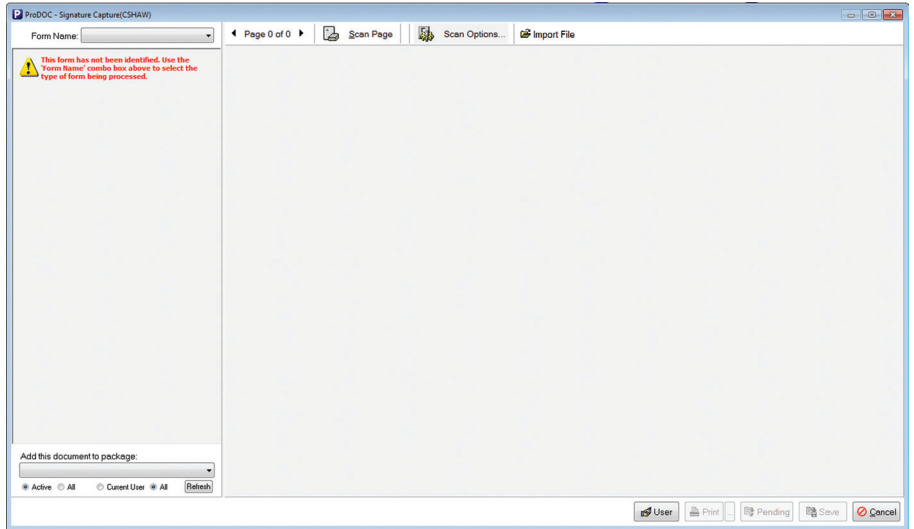
Right-click the ProDOC icon and choose Scan from the pop-up menu.

**Scan** opens the **Signature Capture** window where scanning is performed. This window will open with a warning that the user must identify a "Form Name" in the box above.

Choosing a **Form Name** from the dropdown will open data fields in the left column. The data fields listed will depend on the type of form selected. As much information as known should be entered into these boxes.

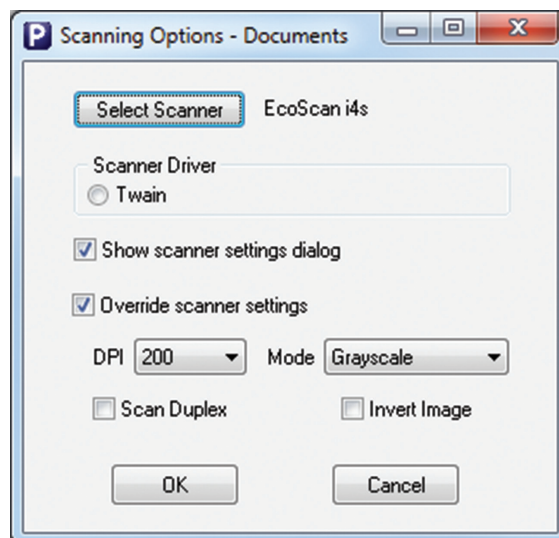
Any document, such as driver's license, insurance card, etc., can be scanned into ProDOC. Documents can be scanned as an additional page of a captured form or as an independent document.

If the new documents being scanned are part of an existing package, be sure to select the package from the **Add the document to package** section. (This function requires Packages add-on).



Click **Scan Options**. This opens the Scanning Options window.

Click **Select Scanner** to display a list of installed scanners.





The **Twain** driver is used for scanning document.

The **Show scanner setting dialog** will open the settings dialog box upon clicking OK.

**Override scanner settings** will take the settings specified in that dialog and make them the default settings when scanning with the selected scanner.

**DPI** stands for Dots Per Inch and is the resolution of the scan output. The higher the DPI the bigger the file will be. eDOC Innovations recommends the following DPIs.

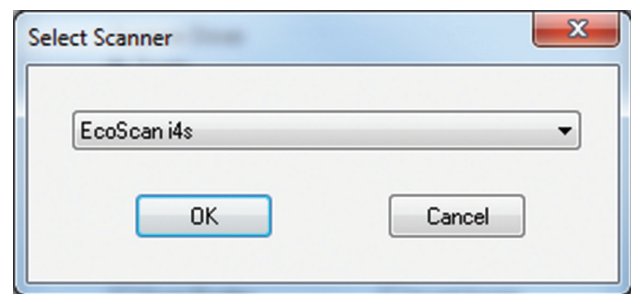
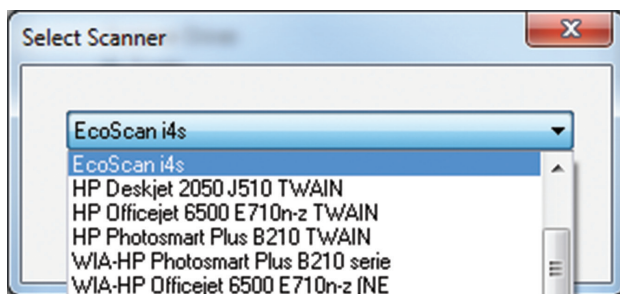
Color Scans	100 DPI
Grayscale Scans	150 DPI
Black and White Scans	200 DPI

**Mode** offers scan color options: Black and White, Grayscale or Color

**Scan Duplex** will scan the front and back of document (Duplex scanner required).

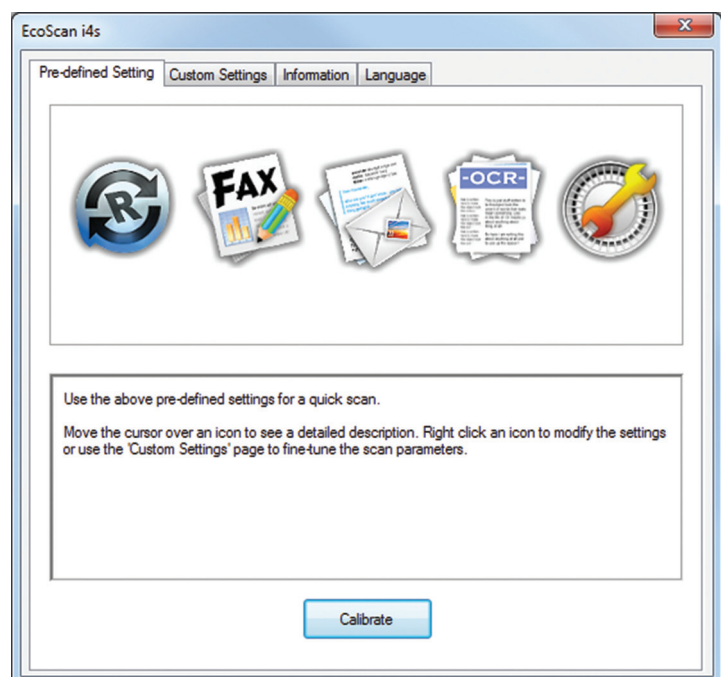
**Invert Image** will flip the image vertically if it was scanned in upside down.

Choose the scanner from the dropdown window. Click okay to save settings or click cancel to return to the previous screen.

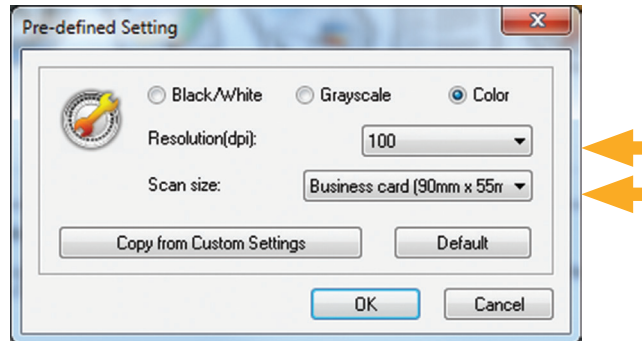


To begin scanning, click the scan page button. This will open the scanner interface of the scanner selected in the previous step. Each scanner will have its own settings page. Refer to the scanner's user manual for explanation and use of settings.

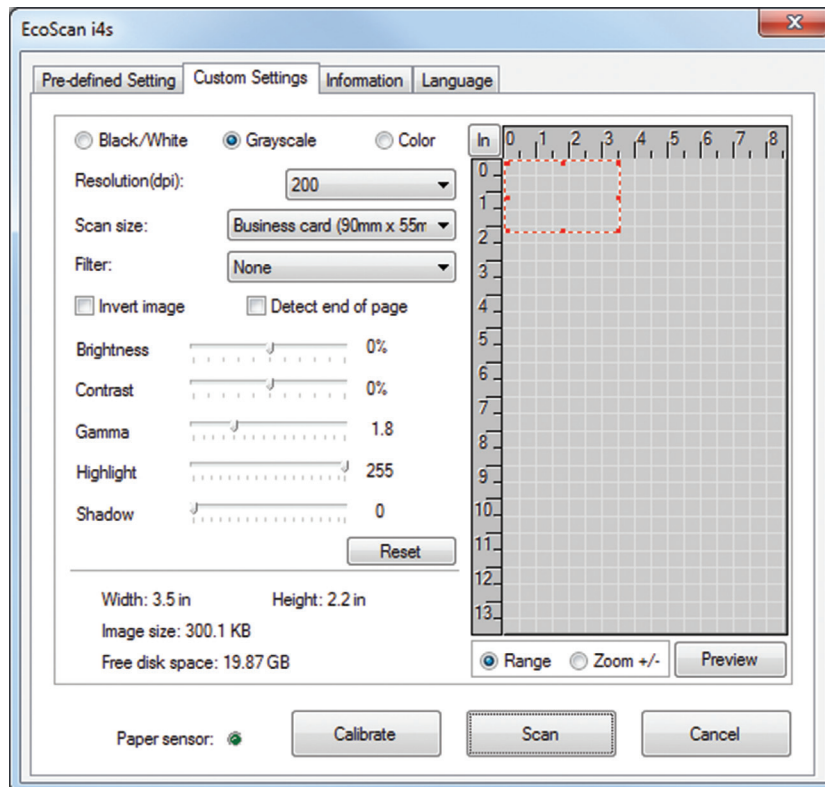
The figure to the right is the scanner interface for the EcoScan i4s scanner. The R with the arrows around it repeats the last scan. The other buttons can be customized per user on each computer. Right clicking the image opens a dialog to change the default settings for the button. Highlighting the mouse over any of the buttons without clicking will show the current settings for that button.



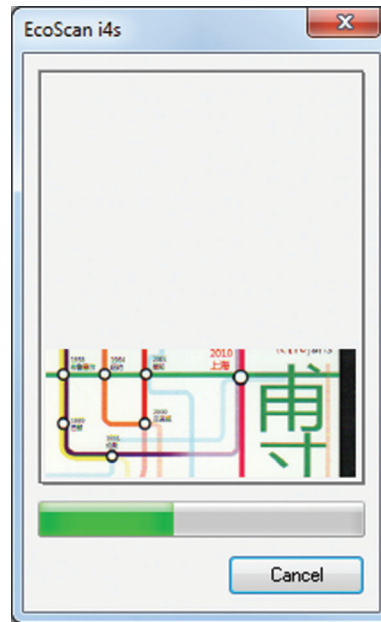
eDOC Innovations recommended settings for business card size documents (such as IDs) are color or grayscale using 100 DPI and **Business card** in the **Scan Size**.



Custom settings also can be used. If the **Override scanner settings** option was checked in the **Scanning Options** window, those settings will be used as default. Settings not specified in the default settings will be the last settings used. eDOC Innovations does not initialize any settings except for the ones in the override box and only if the check box is used.



Once **Scan** is selected, the scanning window will open as it is scanning the page.



When the scan is complete, the document will appear in the **Signature Capture** window. The data fields also can be filled in at this time. The buttons that appears at the top of the window allow the user to modify the newly scanned document.

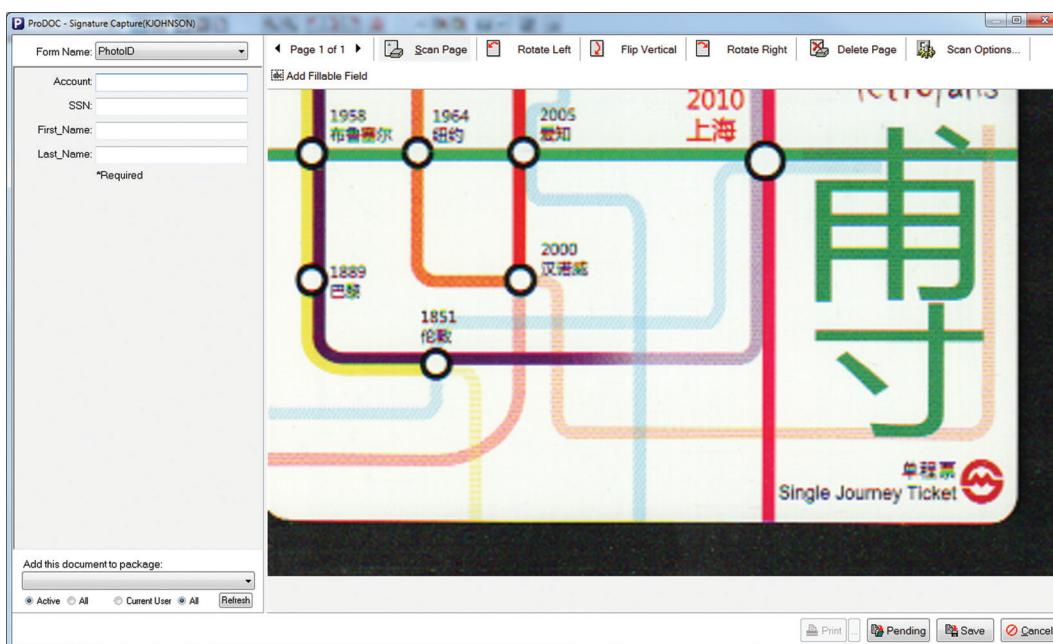
**Rotate Left** will rotate the document to the left.

**Flip Vertical** will flip the document 180 degrees.

**Rotate Right** will rotate the document to the right.

**Delete Page** will delete the page on the screen so it can be rescanned or removed.

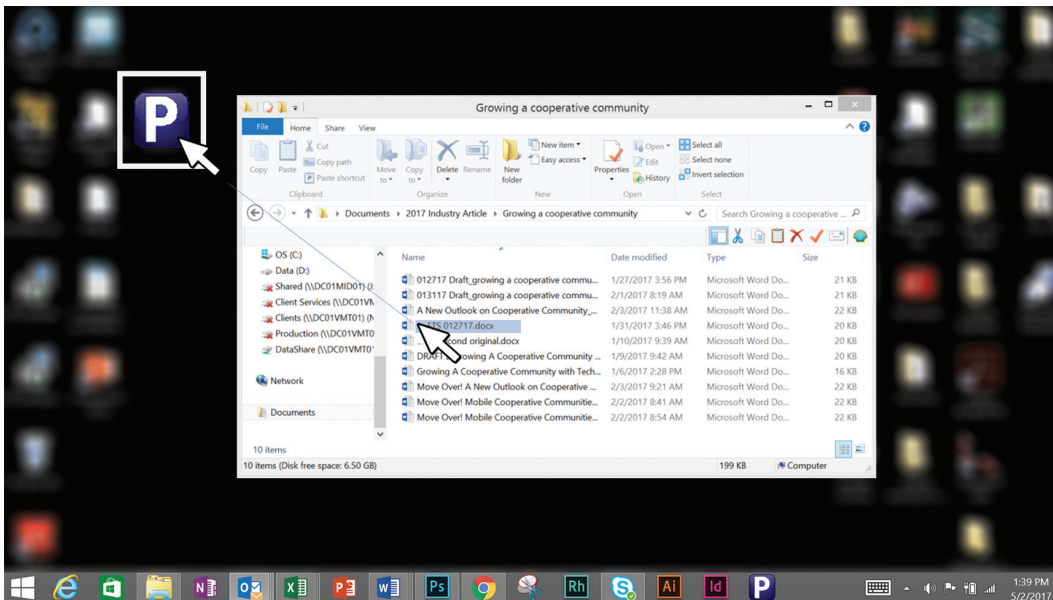
The **Add Fillable Field** option will allow the user to add a field to type text into the newly scanned document (see **Fillable Forms**).



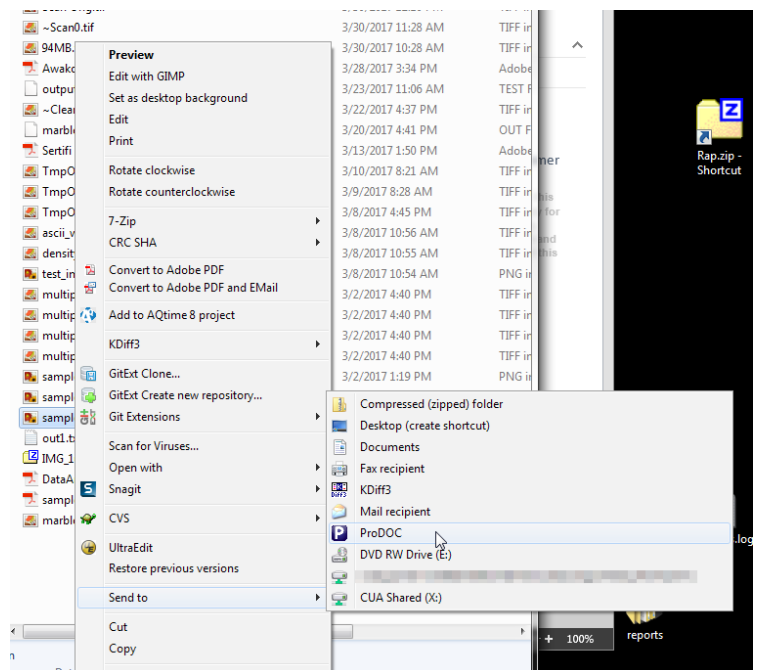
### Import File

In addition to scanning images, you also may import file from other applications directly into ProDOC from your file system or from inside the ProDOC (TIFF, .png, .gif, .jpeg, .bmp, and .pdf formats supported). Following are three ways to import files into ProDOC.

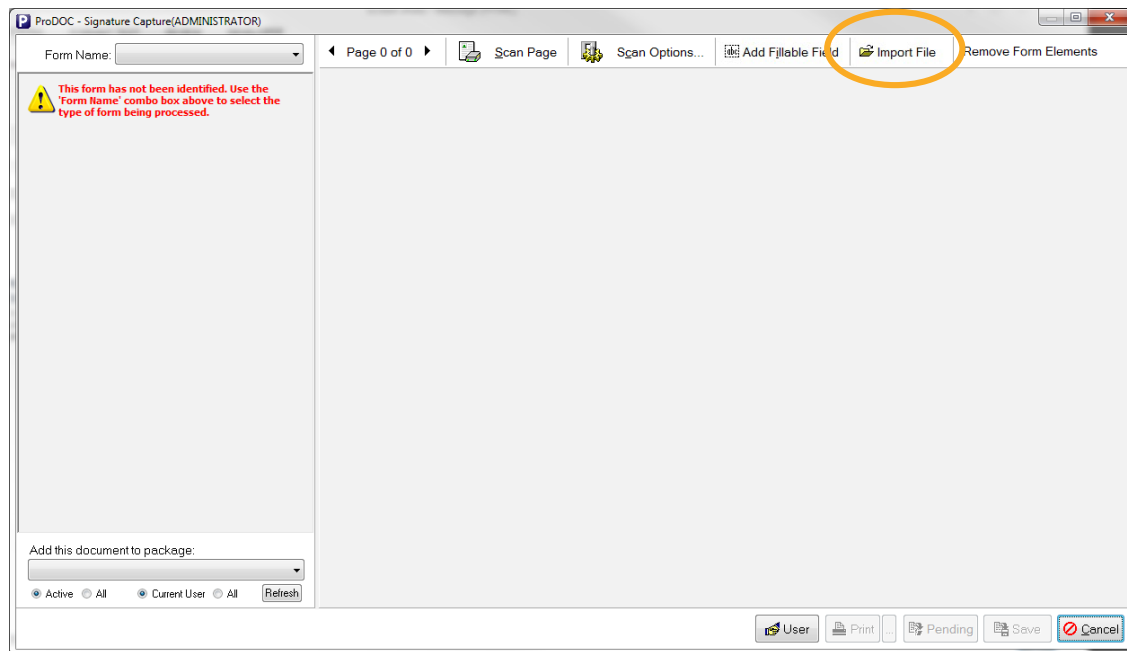
1. Drag a document directly into your ProDOC icon and it will open ProDOC and display the document automatically!



2. Locate and highlight the document you wish to import into ProDOC. Right click on your mouse to open the action pane and select **Send to**. From the submenu, choose **ProDOC**. This will open ProDOC and display the document.



3. If you are already in ProDOC, click on **Import File**. This will open your file systems. Browse to the document you want to import and double click on it.



When the import is complete, the document will appear in the **Signature Capture** window where the data fields can be filled in at this time. The buttons that appears at the top of the window allow the user to modify the newly imported document.

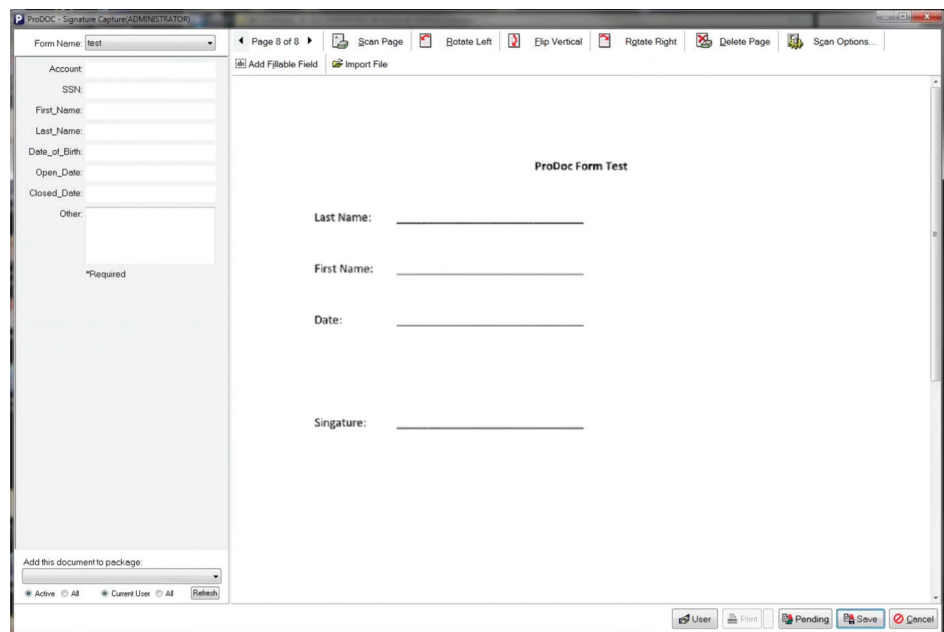
**Rotate Left** will rotate the document to the left.

**Flip Vertical** will flip the document 180 degrees.

**Rotate Right** will rotate the document to the right.

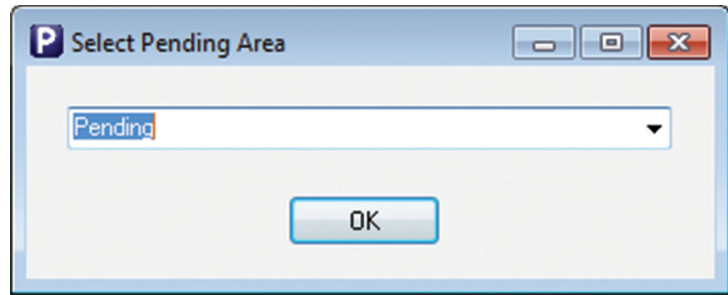
**Delete Page** will delete the page on the screen so it can be rescanned or removed.

The **Add Fillable Field** option will allow the user to add a field to type text into the newly scanned document (see **Fillable Forms**).



### Load Pending

If the computer only has one pending area specified, this window will not open. If there are multiple pending areas, this window will allow the user to choose the area from the dropdown where the documents are stored. Select the **Pending Area** and click OK. This will open the **Load Pending Document** window.

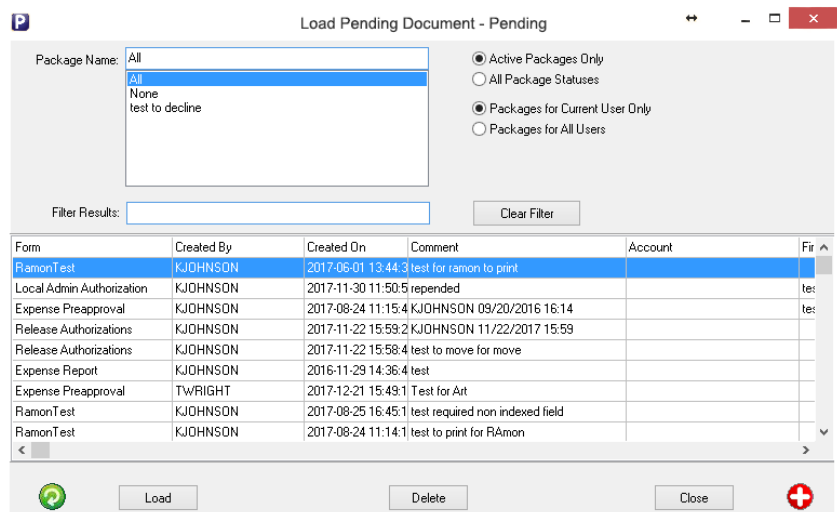


The package name has an “All” category, allowing you to search throughout all packages. Your search can include data from form, created by, created on, comment, and account fields. In the Filter Results box, type your search criteria. The results filter as you type. Matches for the text are displayed Filter Results. This feature is turned Off by default. Contact an [eDOC Client Development Team Representative](#) to make your Pending searches quick and easy.

Double click or highlight the item and click on **Load**. This opens the document in its current status in the **Signature Capture** window.

**Delete** will remove the highlighted document from the **Load Pending Document** window. In the **Confirm** window, click Yes to continue or No to cancel.

**Close** exits the Load Pending function.



 **Refresh**  
Clicking on this symbol will refresh the document on the screen.

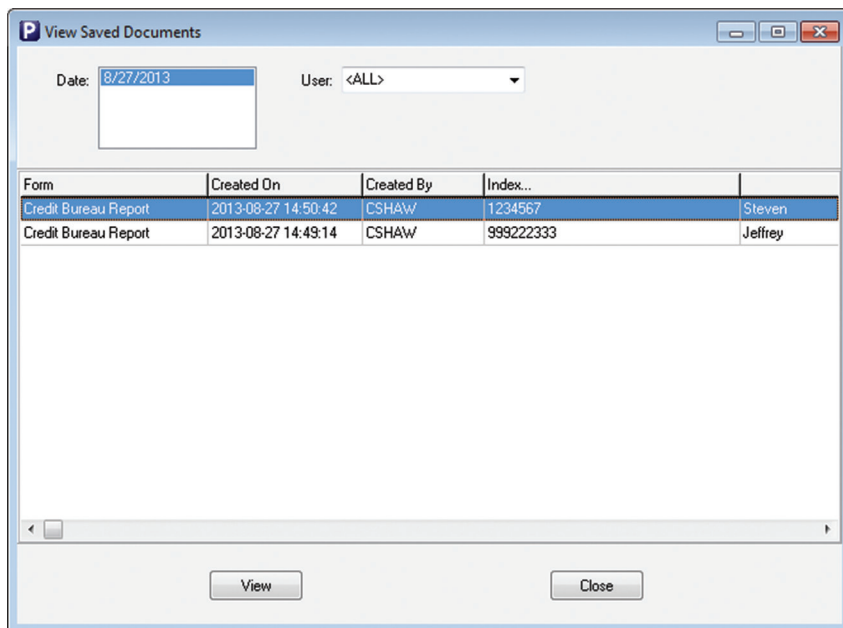
 **Rebuild**  
Clicking on this symbol will rebuild the entire list of documents.

### Packages

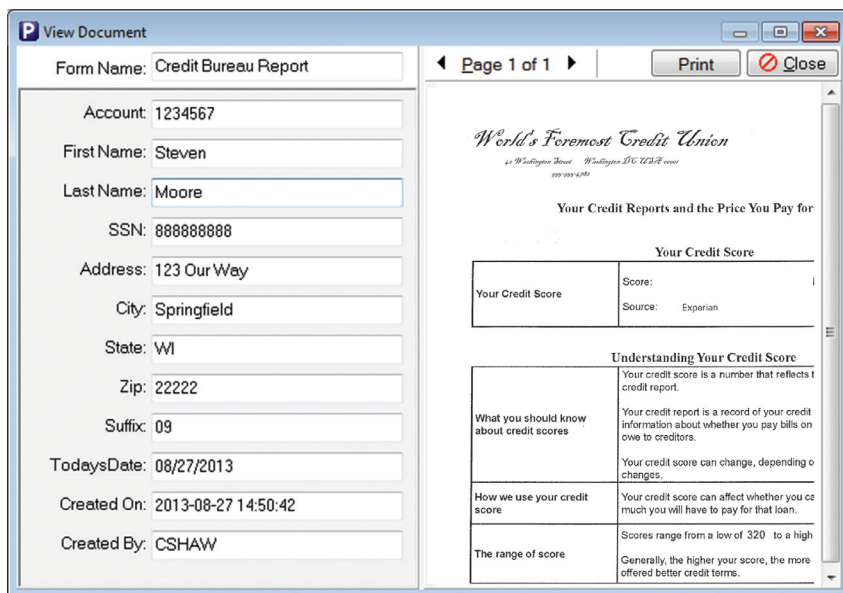
Packages is an add-on ProDOC feature that defines sets of documents used in a business process and facilitates the exchange of data between those documents. This helps users complete the process successfully by guiding the user through the creation of required and optional documents, reducing the work necessary to complete the documents because data filled in one document automatically transfers to subsequent documents. This also allows the user to see the status of all documents pertaining to the process in one location. Packages also supports interfaces with third-party tools to provide advanced services, such as electronic document signing. More information on how to navigate in packages is presented later in this manual, or the user can refer to the **ProDOC Administrator Guide**.

### Saved Documents

**Saved Documents** opens the **View Saved Documents** window which allows the user to view and print saved documents from the previous seven days (or whatever number is specified in the configuration file) on the computer they were created on.

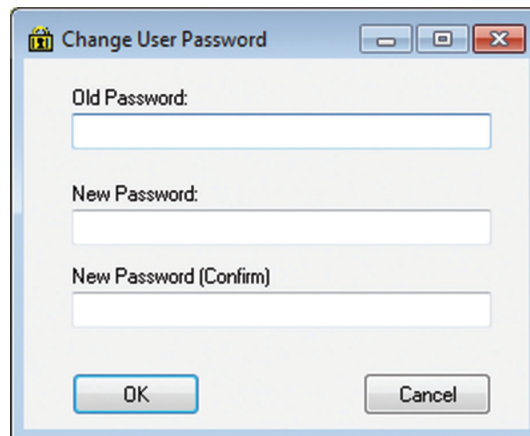


Double-clicking on a form or highlighting a form and selecting **View** opens the **View Document** window which displays the selected document and its corresponding index information.



### Change Password

**Change Password** opens the **Change User Password** window to allow the logged-in user to change their password.



## *Users and Groups*

**Users and Groups** are administrative tasks that allow users to add, modify or delete users and groups and their associated permissions. Refer to the **ProDOC Administrator Guide** for more information on how to use this function.

## *About ProDOC*

**About ProDOC** opens the program's splash screen which includes License Name, Expiration Date, Product Version and Compile Date. This is important information to have when making a support call to eDOC Innovations.



## *Log off*

**Log off** logs-off the current user and opens the login window for a new user to login.

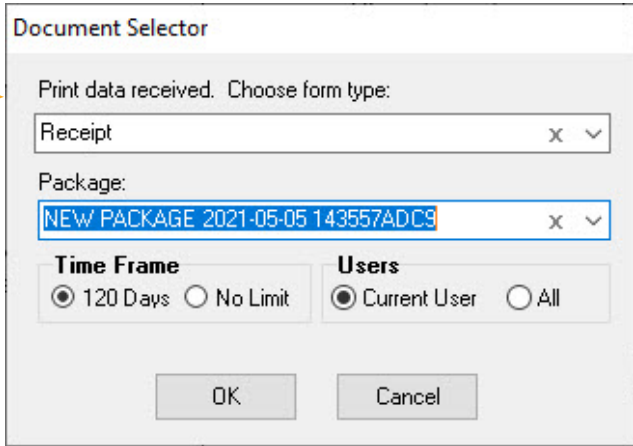
## *Exit*

**Exit** closes ProDOC. eDOC Innovations recommends exiting the application every evening before logging off the computer.



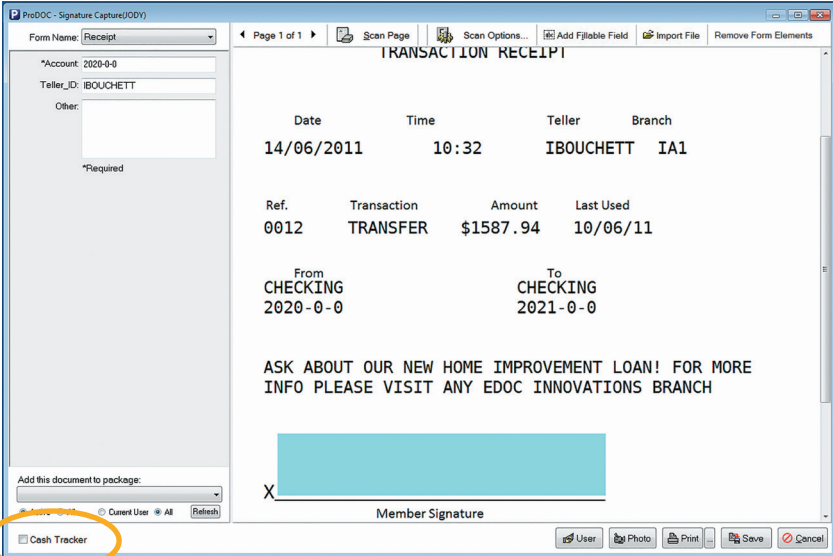
## RECEIPT CAPTURE

ProDOC works by consistently monitoring a path on the computer for files sent from the core processor. To begin a Receipt Capture, the receipt must first be generated in the core data processor and print or output to ProDOC. As long as the user is signed into ProDOC, this will open the **Document Selector** window. Select the form in the **Print data received. Choose form type:** dropdown. Choose **Package** if available (or **None**) and click **OK**.



The **Document Selector** dialog box is shown. It has a title bar with the text "Document Selector". Below the title bar, there is a label "Print data received. Choose form type:" followed by a dropdown menu containing the word "Receipt". Below that is a label "Package:" followed by a dropdown menu containing the text "NEW PACKAGE 2021-05-05 143557ADC9". There are two sections: "Time Frame" with radio buttons for "120 Days" (selected) and "No Limit"; and "Users" with radio buttons for "Current User" (selected) and "All". At the bottom are "OK" and "Cancel" buttons. A yellow arrow points to the "Print data received. Choose form type:" label.

This will open the document in the **Signature Capture** window. If the computer is configured to "select form after display" then this window will not display and the user will be taken directly to the Signature Capture window.

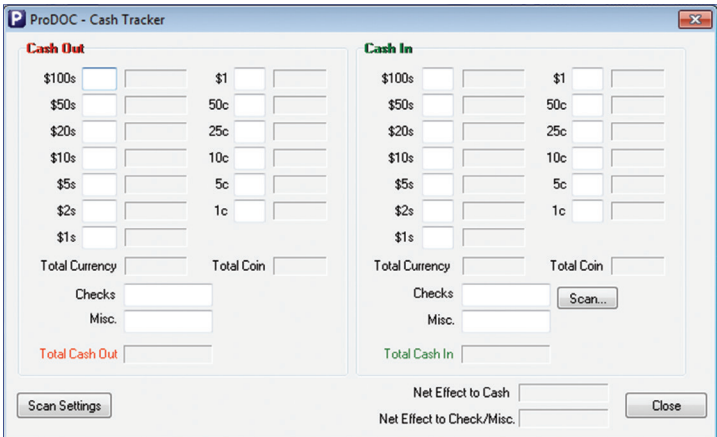


The **Signature Capture** window is shown. The title bar reads "ProDOC - Signature Capture(000)". The window is split into two panes. The left pane has a "Form Name:" dropdown set to "Receipt" and a "Teller\_ID:" field with "IBOUCHETT". The right pane displays a "TRANSACTION RECEIPT" with the following details: Date: 14/06/2011, Time: 10:32, Teller: IBOUCHETT, Branch: IA1. Below this is a table with columns "Ref.", "Transaction", "Amount", and "Last Used", containing one row: "0012", "TRANSFER", "\$1587.94", "10/06/11". Further down, it shows "From CHECKING 2020-0-0" and "To CHECKING 2021-0-0". A promotional message reads: "ASK ABOUT OUR NEW HOME IMPROVEMENT LOAN! FOR MORE INFO PLEASE VISIT ANY EDOC INNOVATIONS BRANCH". At the bottom, there is a "Member Signature" field with a blue box and a signature icon. At the bottom left, there is a "Cash Tracker" checkbox which is circled in orange. The bottom right has "User", "Photo", "Print", "Save", and "Cancel" buttons.

### Cash Tracker

The **Cash Tracker** window will open if it has been selected from the **Setup | Receipt** tab by an administrator. The default setting for opening Cash Tracker is determined by the institution at setup, but a user can force Cash Tracker to open on demand by checking the Cash Tracker box in the **Signature Capture** window.

The Cash Tracker is an electronic calculator that can be used as a research tool to track money brought in and taken out at the teller line and works in addition to a register tape. The information will append to the receipt without being visual on the receipt or the screen and will allow users to search the database later if needed.



The **ProDOC - Cash Tracker** window is shown. It has a title bar with "P ProDOC - Cash Tracker". The window is divided into two main sections: "Cash Out" on the left and "Cash In" on the right. Each section has input fields for various denominations: \$100s, \$50s, \$20s, \$10s, \$5s, \$2s, \$1s, and Total Currency. Below these are fields for "Checks" and "Misc.". The "Cash Out" section also has a "Total Cash Out" field. The "Cash In" section has a "Total Cash In" field and a "Scan..." button. At the bottom, there are fields for "Net Effect to Cash" and "Net Effect to Check/Misc.", along with "Scan Settings" and "Close" buttons.

To close the Cash Tracker window, click **Close**.

## FORM CAPTURE

Once a document is created and sent to ProDOC, the form capture window will open.

Any document that can be physically printed can be printed to the ProDOC virtual printer. This printer sends files to the same path as the core host. Once ProDOC processes the information, the **Document Selector** window will open. Choose the form type from the **Form Name** dropdown, or click the search icon and type the name. Once the location is chosen, the **Signature Capture** window will open where the user can populate the index fields. Once the required account field is filled, any information associated with that account will auto fill into the index fields (First Name, Last Name, SSN).

Some data processors may automatically fill in some or all of the data. This creates searchable index data.

ProDOC - Signature Capture(ERIC.BURZ)

Form Name:

Page 1 of 3 | Scan Page | Scan Options... | Add Fillable Field | Import File

Remove Form Elements

Account: \_\_\_\_\_  
 SSN: \_\_\_\_\_  
 First\_Name: \_\_\_\_\_  
 Last\_Name: \_\_\_\_\_  
 Other:   
 \*Required

OTHER INCOME MONTHLY AMOUNT OTHER INCOME MONTHLY AMOUNT

PREVIOUS EMPLOYER YEARS PREVIOUS EMPLOYER YEARS

NEAREST RELATIVE (NOT LIVING WITH YOU)  
 NAME ADDRESS PHONE RELATIONSHIP

OWN  RENT MY RESIDENCE VALUE OF HOME  OWN  RENT MY RESIDENCE VALUE OF HOME

HOUSING PAYMENT MORTGAGE CO. HOUSING PAYMENT MORTGAGE CO.

CREDIT INSURANCE: Credit insurance is available for a nominal cost for this loan. If you are interested in credit insurance please check below:  
 Credit Disability  Yes  No Initials \_\_\_\_\_ Single Credit Life  Yes  No Initials \_\_\_\_\_ Joint Credit Life  Yes  No Initials \_\_\_\_\_

This statement is submitted to obtain credit and I (We) certify that all information herein is true and complete. I (We) also authorize the Credit Union to verify or obtain further information the Credit Union may deem necessary concerning my (our) credit standing. If this application is approved and a Visa card(s) issued, the undersigned applicant(s) by signing, using or permitting another to use the Visa card(s) agree(s) that the applicant(s) will be bound by the terms and conditions accompanying the Visa card(s) and all amendments. My (our) signature(s) represent(s) acknowledgement of receipt and agreement to the terms and conditions of the Visa Credit Card Agreement and Disclosures.

APPLICANT'S SIGNATURE DATE CO-APPLICANT'S SIGNATURE DATE  
 X \_\_\_\_\_ X \_\_\_\_\_

By signing this contract, you agree that this Credit Union has a security interest, pledge, in all present or future shares and deposit with us. To the extent in which you have a right to withdraw those sums for your personal use, the Credit Union may transfer from any deposit accounts to your Visa account if you are delinquent or otherwise in default. In addition, collateral securing your other loans with the Credit Union account(s) will also secure credit extended under this agreement. If you withdraw all your shares, you are no longer a member of the Credit Union, and you may not receive any more advances under this agreement.

APPLICANT'S SIGNATURE DATE CO-APPLICANT'S SIGNATURE DATE  
 X \_\_\_\_\_ X \_\_\_\_\_

DATE  APPROVED  DENIED AMOUNT \$ \_\_\_\_\_ SIGNATURE OF LOAN OFFICER(S) \_\_\_\_\_

©2011 CU Solutions Group RVCU 042611

Photo User Print ... Pending eSign Send To Member Save Cancel

Make sure all data in the index match the information on the form.

If the document requires a signature and the signer is present, the user could have the document signed now. Once the signature is appended, the index fields on the left are locked and marked as complete. However, if information in the index fields did need to be changed after the signature was appended and the index fields were locked, by left clicking on the signature box and then right clicking, a **Retry** button will appear. Clicking on **Retry** will erase the signature and unlock the fields on the left. The customer's signature then would need to be recollected.

## FILLABLE FORMS

Fillable Forms are created by the administrator. These forms allow the user to populate information into a document by filling in the index fields. Not all documents will have this ability. As a user becomes more familiar with their system, they will also become more familiar with what forms have been set up as fillable.

Right-click ProDOC and select **Create**. The **Document Selector** will open. Select the document.

Fillable fields that have been configured on the form can be typed in directly on the form. Only indexed information that has been configured as fillable fields will show on the right screen. Fill out index information on the left for document retrieval after the document has been saved. If the account number has no fillable field in the form, it will not show up on the form but will be required before saving.

### Signature Capture Buttons

**User** will allow someone else to sign into ProDOC to save as that user.

**Photo** will take a picture through the security cameras at the institution. Currently, eDOC Innovations only supports Digital Sprite security cameras.

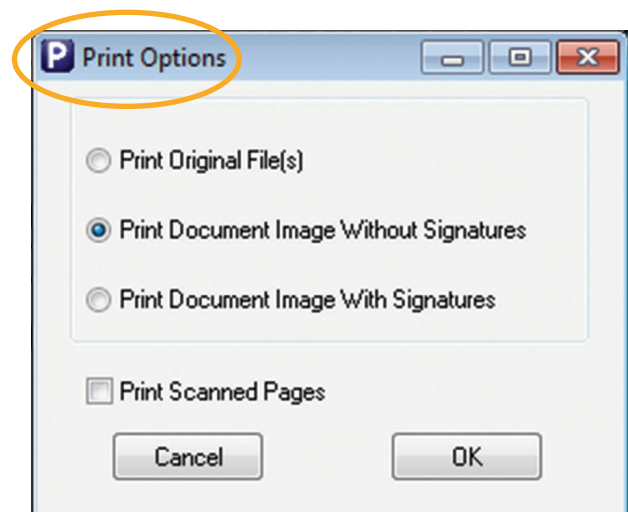
**Print** will physically prints a copy of the document. Clicking on the ellipsis next to print will open the **Print Options** window. Select options and click OK.

**Pending** will allow the user to store the document in an unfinished state for later retrieval. The document can then be retrieved and completed by another user and saved to the archive.

**eSign** will open the **Signer Information** window (see eDOC Signature section).

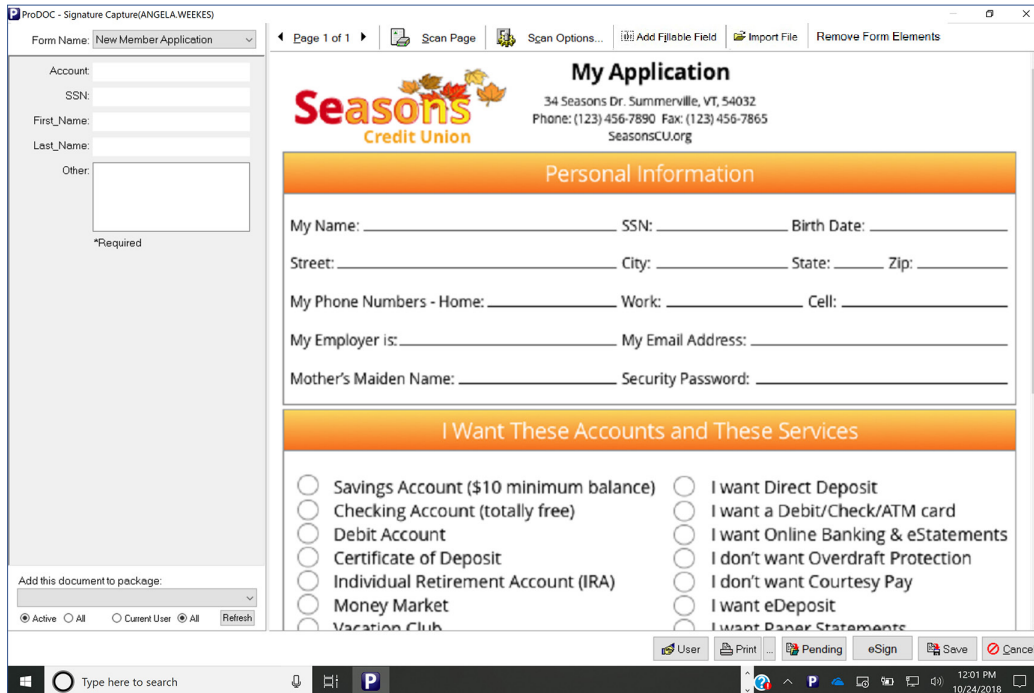
**Save** will save the document.

**Cancel** will cancel the document.

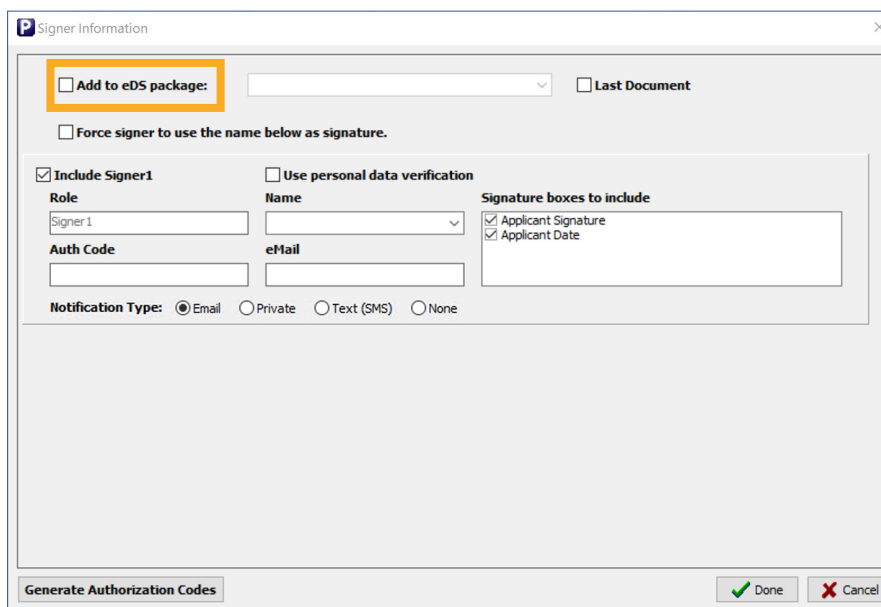


### Add Forms to eDOCSignature Packages

You can add a form to an eDOCSignature package and auto-populate the signer roles. From the Capture screen, add the information and select **eSign**.



The **Signer Information** window appears. Check the box to add the forms to an eDS package.



Select your package from the drop-down list.

The screenshot shows the "Signer Information" dialog box. The "Add to eDS package:" dropdown menu is open, displaying a list of packages: "eDOC Innovations Inc Nov 2 09/27/2018", "My Test", "New Member Application-Winter 912018" (which is highlighted), "PAM - ConState VII 10/09/2018", and "PAM - ConState VIII". Below the dropdown, the "Include Signer1" checkbox is checked. The "Name" field is set to "Signer1". The "Auth Code" field is empty. The "Notification Type" is set to "Email". The "Signature boxes to include" section has "Applicant Signature" and "Applicant Date" checked. At the bottom, there are "Generate Authorization Codes", "Done", and "Cancel" buttons.

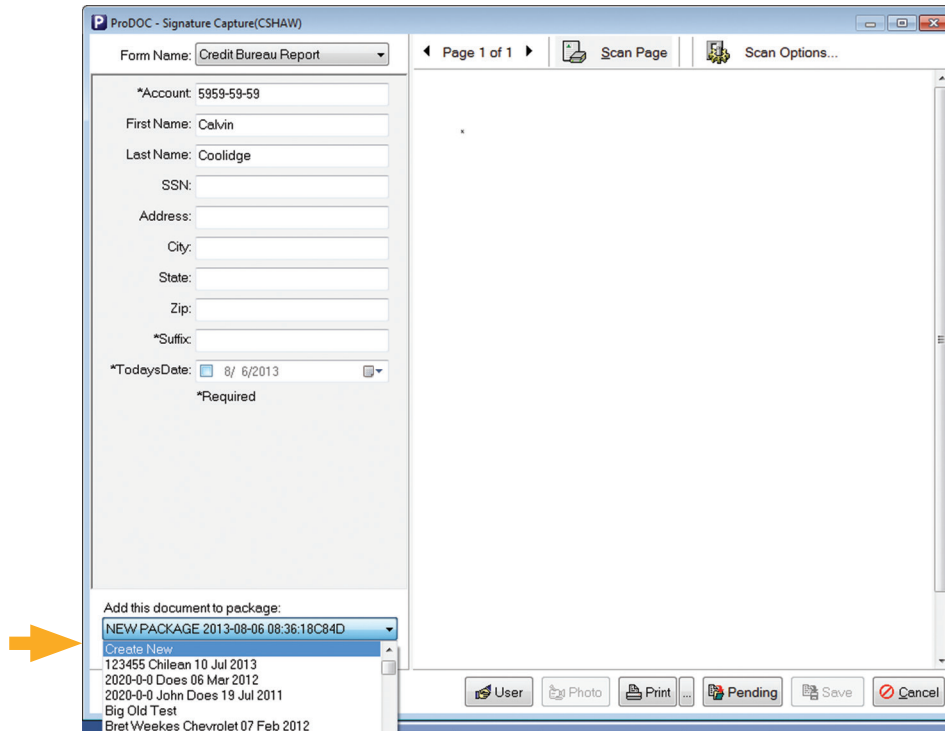
ProDOC auto-populates the signer information from the eDOCsSignature package.

The screenshot shows the "Signer Information" dialog box with the "Add to eDS package:" dropdown menu set to "New Member Application-Winter 912018". The "Include Signer1" checkbox is checked. The "Name" field is set to "Sally Summer". The "Auth Code" field is set to "1234". The "eMail" field is set to "ssummer@seasonscu.com". The "Notification Type" is set to "Email". The "Signature boxes to include" section has "Applicant Signature" and "Applicant Date" checked. At the bottom, there are "Generate Authorization Codes", "Done", and "Cancel" buttons.

## NAVIGATING PRODOC PACKAGES

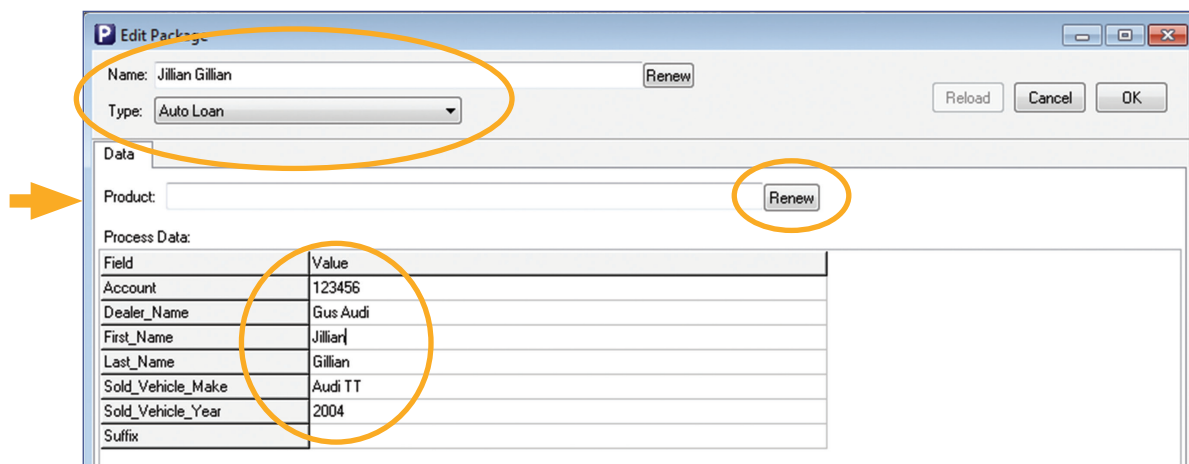
### Create a Package

Virtually print forms from the host data processing system. When the form loads into ProDOC, the user will need to select **Create New** from the **Add Document to Package** found at the bottom-left of the ProDOC screen.



The **Edit Package** window will open and auto-populate any information already entered into the ProDOC **Signature Capture** window (Account, First/Last name, etc.). Verify all required data are correct. Enter **Product** details, if required, based on the institution's use of the Product field. Click **OK**.

The **Renew** button will reset package or product information to the default settings.



This will populate package data to the **Add this Document to Package** seen at the bottom-left of the ProDOC screen. Collect any signatures in person that are necessary. When ready, complete the document by choosing **Save, Print, Pending, eSign. Cancel** will cancel the document and delete any changes.

ProDOC - Signature Capture(CSHAW)
Page 1 of 1
Scan Page
Scan Options...

Form Name: Credit Union Note and Disclosu

Account: 123456

SSN:  

First Name: Jillian

Last Name: Gillian

Other:  

\*Required

**ADD THIS DOCUMENT TO PACKAGE**

Add this document to package:

Jillian Gillian

Active
 All
 Current User
 All

Refresh

eDOC INNOVATIONS		RETAIL INSTALLMENT CONTRACT - CONSUMER PAPER																																					
SECURITY AGREEMENT AND FEDERAL DISCLOSURE STATEMENT																																							
Buyer's Name and Address (Labeled "You")		Seller's Name and Address (Seller and Assignee Labeled "Creditor")																																					
123 Anytown Street Maple Creek, WI 53001		456 Main Road Northgate, Vermont 05401																																					
<b>ANNUAL PERCENTAGE RATE</b>	Finance Charge	Amount Financed	Total Payments	Total Sale Price																																			
7.6	\$ 50	\$ 102,005.09	\$ 122,638.20	\$ 128,005.09																																			
Year Model		Col No.	Make of Motor Vehicle	Body Type	Serial Number																																		
2011 08 30-40000		3	ALFA	COUPE	40000110000000000000																																		
<p><b>ITEMIZATION OF AMOUNT FINANCED</b></p> <table style="width: 100%; font-size: 8px;"> <tr> <td>Cash Price (including any Sales Tax)</td> <td style="text-align: right;">\$ 126,956.44</td> </tr> <tr> <td>DOWN PAYMENT</td> <td style="text-align: right;">\$ 25,000</td> </tr> <tr> <td>A. Cash Down Payment</td> <td style="text-align: right;">\$ 25,000</td> </tr> <tr> <td>B. Trade-In</td> <td style="text-align: right;">\$ 20,000</td> </tr> <tr> <td>C. Trade-In Depreciation</td> <td style="text-align: right;">\$ 20,000</td> </tr> <tr> <td colspan="2">UNPAID BALANCE OF CASH PRICE (if more than 1)</td> <td style="text-align: right;">\$ 116,956.44</td> </tr> <tr> <td colspan="2">A. NET UNPAID BALANCE PRIOR ACCT</td> <td style="text-align: right;">\$ 0</td> </tr> <tr> <td colspan="2">AMOUNTS PAID TO OTHER ON YOUR BEHALF</td> <td style="text-align: right;">\$ 228</td> </tr> <tr> <td>A. For Credit Life</td> <td style="text-align: right;">\$ 228</td> <td></td> </tr> <tr> <td>B. For Credit Disability</td> <td style="text-align: right;">\$ 0</td> <td></td> </tr> <tr> <td>C. For Automobile Repair</td> <td style="text-align: right;">\$ 0</td> <td></td> </tr> <tr> <td>TOTAL PAID TO OTHERS</td> <td style="text-align: right;">\$ 228</td> <td></td> </tr> <tr> <td><b>AMOUNT FINANCED</b></td> <td style="text-align: right;"><b>\$ 117,684.20</b></td> <td></td> </tr> </table>						Cash Price (including any Sales Tax)	\$ 126,956.44	DOWN PAYMENT	\$ 25,000	A. Cash Down Payment	\$ 25,000	B. Trade-In	\$ 20,000	C. Trade-In Depreciation	\$ 20,000	UNPAID BALANCE OF CASH PRICE (if more than 1)		\$ 116,956.44	A. NET UNPAID BALANCE PRIOR ACCT		\$ 0	AMOUNTS PAID TO OTHER ON YOUR BEHALF		\$ 228	A. For Credit Life	\$ 228		B. For Credit Disability	\$ 0		C. For Automobile Repair	\$ 0		TOTAL PAID TO OTHERS	\$ 228		<b>AMOUNT FINANCED</b>	<b>\$ 117,684.20</b>	
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TOTAL PAID TO OTHERS	\$ 228																																						
<b>AMOUNT FINANCED</b>	<b>\$ 117,684.20</b>																																						

**Promise to Pay.** Instead of paying the cash price, you purchase goods and services as provided in this Contract and will pay Creditor the Total of Payments shown above. Finance Charges begin on date of sale, unless delivery of goods or performance of services is more than 10 days thereafter. Payments begin one month after Finance Charges begin. You may pay more at any time. After final due date, or on any judgment, you will pay Finance Charges at the Annual Percentage Rate, until fully paid. Each person signing as Buyer is personally liable for the entire amount due.

**CREDIT INFORMATION MARKETING.** (a) Creditor may investigate your credit worthiness (including obtaining credit reports and verifying employment information). Creditor may use any credit report obtained in connection with making this sale for subsequent credit offers. Creditor may share with its affiliates any information regarding you or your application, acceptance, or credit experience with Creditor. However, you may request that this information not be shared with affiliates by notifying Creditor by mail or phone at the location shown above or on your billing statement. (b) From time to time you may receive a loan by mail offer from the Creditor. If this offer is in the form of a check, you may destroy it if you wish. If you do not wish to receive such offers, part (b) of the paragraph should be struck.

**APPLICABLE LAW.** This Contract is made under Utah Law. Creditor may sell to anyone it chooses, and assignee will have the same rights as Creditor.

**NOTICE: IF YOU PAY THIS LOAN OR SALE ON CREDIT PARTIALLY OR IN FULL BEFORE ITS DUE DATE, THE AMOUNT OF INTEREST YOU PAY WILL BE GREATER THAN THE AMOUNT OF INTEREST YOU WOULD PAY FOR A SIMPLE INTEREST LOAN OF THE SAME PRINCIPAL AMOUNT.**

**BY SIGNING BELOW, YOU HAVE READ, UNDERSTAND AND AGREE TO THE TERMS AND CONDITIONS IN THIS DOCUMENT, INCLUDING THE ARBITRATION PROVISIONS THAT PROVIDE, AMONG OTHER THINGS, THAT EITHER YOU OR CREDITOR MAY REQUIRE THAT CERTAIN DISPUTES BETWEEN YOU AND CREDITOR BE SUBMITTED TO BINDING ARBITRATION. IF YOU OR CREDITOR SELECT TO USE ARBITRATION BOTH YOU AND CREDITOR WILL HAVE WAIVED YOUR AND CREDITOR'S RIGHT TO TRIAL BY JURY OR JUDGE. THE DISPUTE WILL BE DECIDED BY AN ARBITRATOR AND THE DECISION OF THE ARBITRATOR WILL BE FINAL. ARBITRATION WILL BE CONDUCTED PURSUANT TO THE RULES OF THE NATIONAL ARBITRATION FORUM.**

Buyers agree they received a copy of this Contract that was completely read to and approved by them prior to signing.

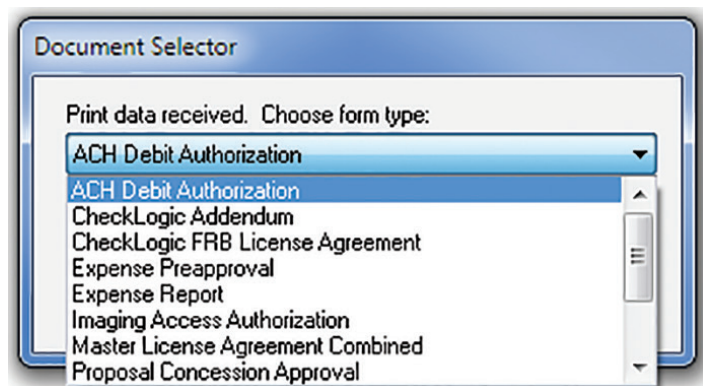
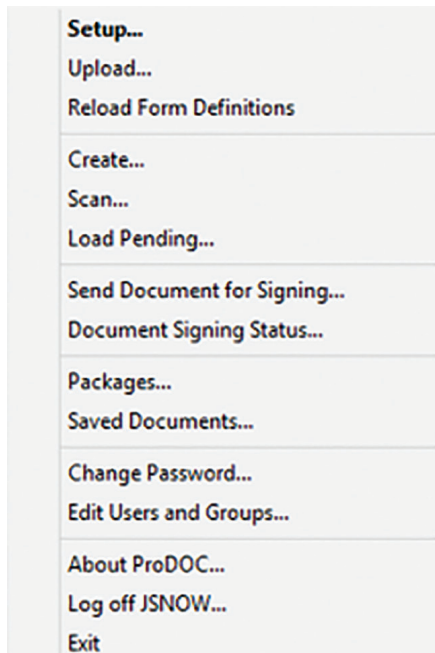
Seller: \_\_\_\_\_ Date: \_\_\_\_\_  
 By: \_\_\_\_\_ Buyer #1: \_\_\_\_\_  
 (Name and Title) Buyer #2: \_\_\_\_\_

Copyright: ProDoc, Inc. All rights reserved.

User Photo Print ... Pending eSign Save Cancel

## INITIATING eSIGN

To begin the process of sending a document out for eSign, capture or create a new document in ProDOC. To capture a document, print the document to the ProDOC Printer that is configured on your workstation. To create a new document from a template, right-click on the ProDOC icon in your systems tray (usually at the bottom of the screen next to the clock) and click on **Create**. The **Document Selector** menu appears. Click on the drop-down list and select the document you want to eSign.



Right-click on the **P** to open ProDOC's menu of options.



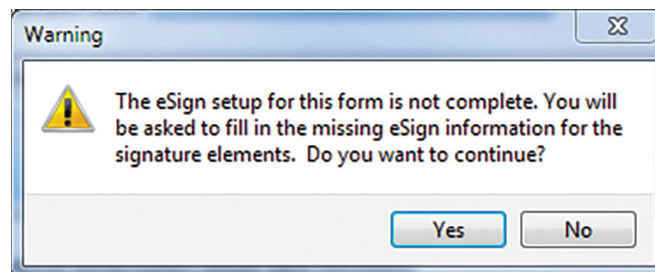
When the document opens, add any fillable fields and index information and click on **eSign**.

The screenshot shows the ProDOC - Signature Capture application window. The title bar reads "ProDOC - Signature Capture". The interface includes a sidebar on the left with fields for "Form Name" (testexpense), "Total Amount Requested" (0.00), "Check Number Reimbursed", "Date Reimbursed", and "Today's Date" (3/25/2016). The main area displays a "Pre-Authorization Expense Form" with the following fields:

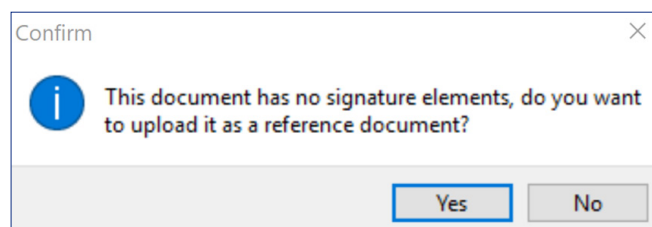
- Date: Report Date
- Employee Name: First Name, Last Name
- Expense Description and/or Client Name: Expense Description or Client Name
- Expense Authorization Details (Best estimates):
  - Airfare: Airfare, Mileage: Mileage
  - Hotel (i.e. # of Days \* \$125): Hotel
  - Food (i.e. # of Days \* \$75): Food
  - Incidental Expense (i.e. # of Days \* \$25): Incident
  - Rental Car (i.e. # of Days \* \$150): Rental
- Month in which travel will occur: Month to Travel

At the bottom of the window, there is a toolbar with buttons for "User", "Print", "Pending", "eSign" (highlighted in orange), "Save", and "Cancel".

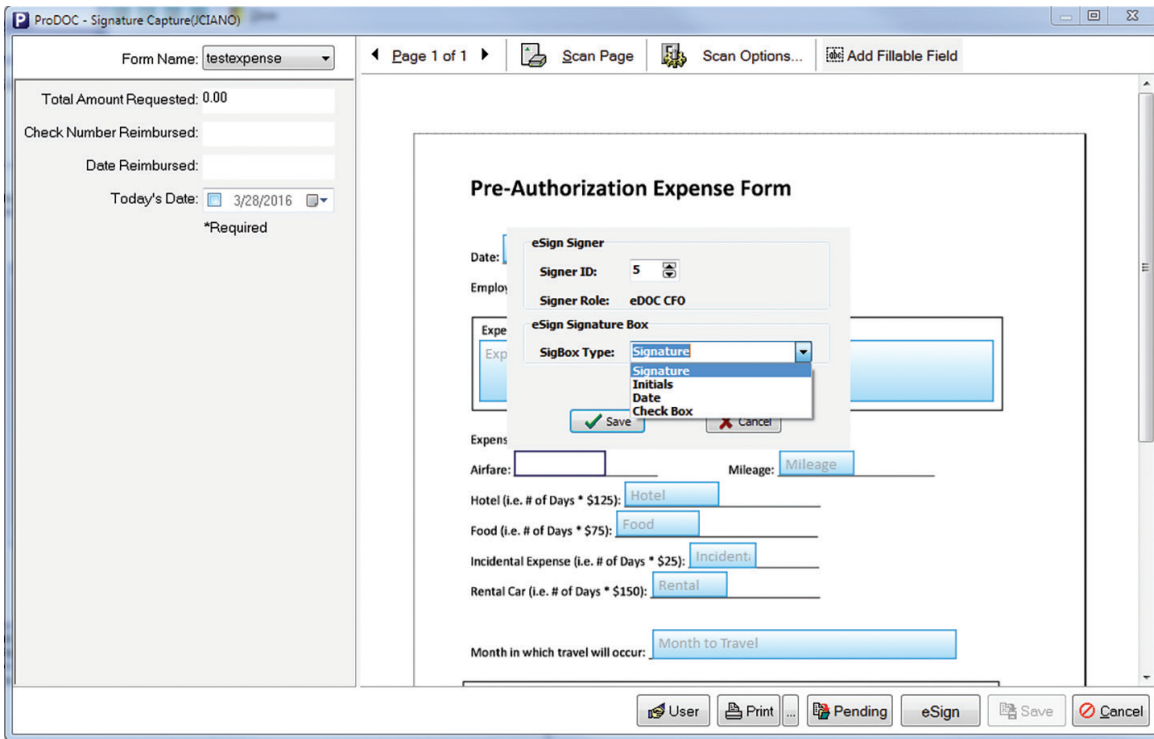
If the eSign setup for this form is not complete, this warning will open asking you to fill in the missing eSign information (signature elements). Click **Yes** to open the **eSign Signer** window. Click **No** to close this window and return to the captured form.



If the eSign button is clicked and the document has not been set up with signature elements, the following will prompt the user asking if they want to upload the document as a reference document to be sent with the package as additional information.

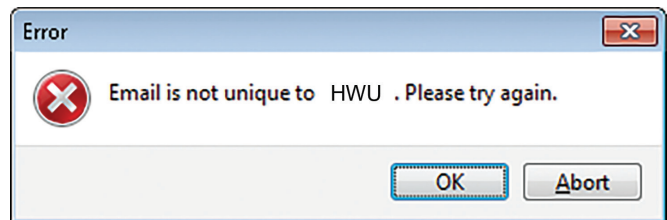


To set up the document for eSign, select the **Signer ID**, which will populate with a preselected **Signer Role**. From the drop-down list, select the **SigBox Type** (Signature, Date, etc.) Click on **Save** to save this information or **Cancel** to exit the window and return to the document.



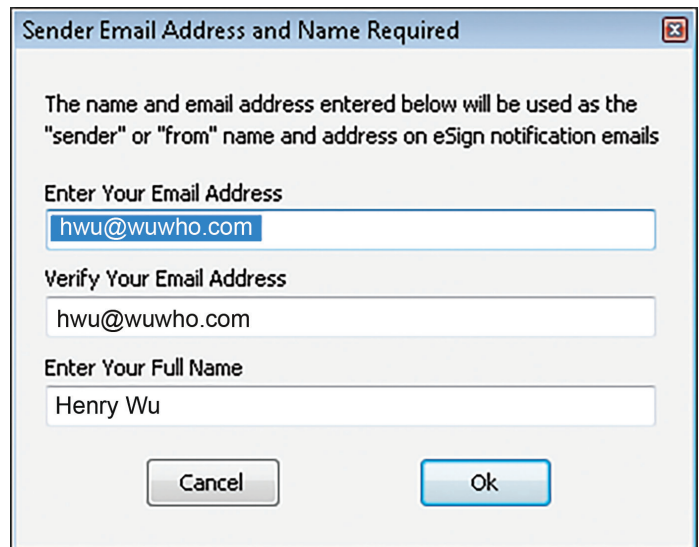
If you get this error, it means you will need to create a unique email address for the sender in your local vault.

Clicking **OK** will open the **Sender Email Address and Name Required** window.



In the **Sender Email Address and Name Required** window, enter the name and address of the sender (the from name) that will appear on the eSign notification emails.

Click **OK** to proceed to the **Signer Information** window.



In the **Signer Information** window, enter the information for each person who will be receiving documents to be signed via eDOC Signature. Signer 1 will always be included. Check or uncheck the **Include Signer** on the left for signers who do or do not need to sign electronically.

For each signer, in the **Notification Type** area, use the radio buttons to select a notification type. You can choose from **Email**, **Private** (private signing rooms must be configured for your institution), **Text (SMS)**, or **None**. If you choose Text (SMS), in the **Notification Phone** field that appears, enter the signer's cell phone number.

**Note:** Text Notifications are a paid feature that must be enabled for your institution. For more information about Text Notifications, contact the eDOC Sales Team.

Check **Force signer to use the name below a signature** to ensure the signer's signature will match the name designated in the name field. When the signer goes to sign their signature to the document, the signer will be forced to use this name and not an abbreviated version.

**Email validation** option: when enabled, ProDOC checks the signer email against the nine standard email extensions (.com, .net, .org, .info, .us, .edu, .biz, .gov, .mil.) If an email address doesn't contain one of these extensions, and is a valid email format, this confirmation will display:

Clicking on **Generate Authorization Code** will randomly select a six-digit authorization code for signers and automatically update the code in the **Auth Code** box. Your organization will decide how you want to distribute authorization codes: via an automatic email or a personal phone call. If a personal phone call is your organization's preference, the automatic email function can be shut off.

If the **Use personal data verification** box is checked, the signer's identity will be verified by a third-party service. To sign up for this service, contact an [eDOC Client Development Team Representative](#).

ProDOC also allows users to upload reference documents. To make the sending process easy, the reference document should be added to the package last. If reference documents have been added to the package, the **for reference only** box should be checked in the Signer Information window.

Signer Information

Force signer to use the name below as signature.

Include Signer1

Role

Auth Code

Use personal data verification

Name

eMail

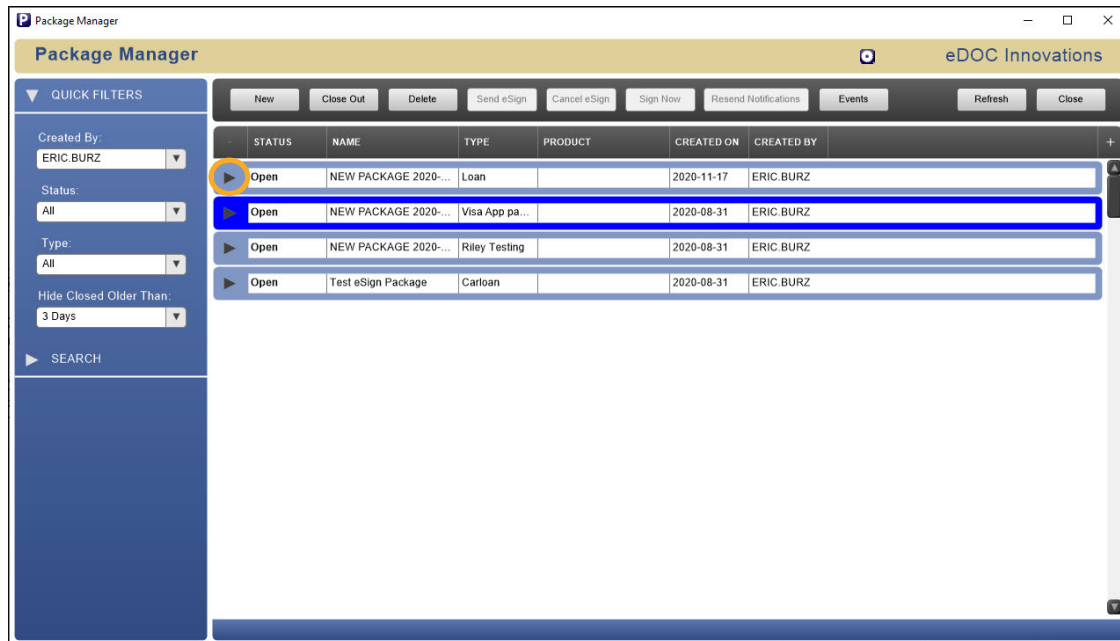
Signature boxes to include

for reference only

Click **Done**. A new package has been created. Subsequent forms now can be added to this and other packages. To access the **Package Manager**, click on the **Packages** option in the **Main Menu**.

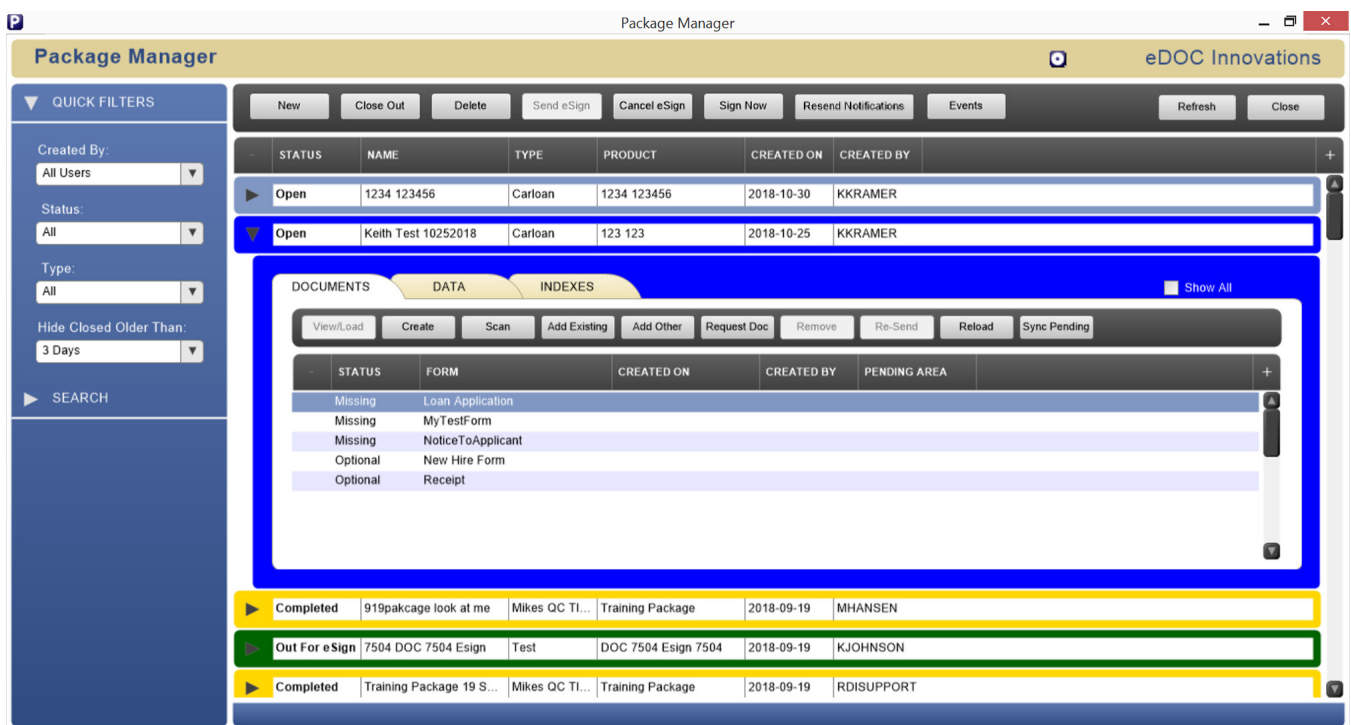
The newly created package will appear at the top of the **Package Manager** window for the user who created it.

Click on ► to expand the package to view the list of forms for this package type.

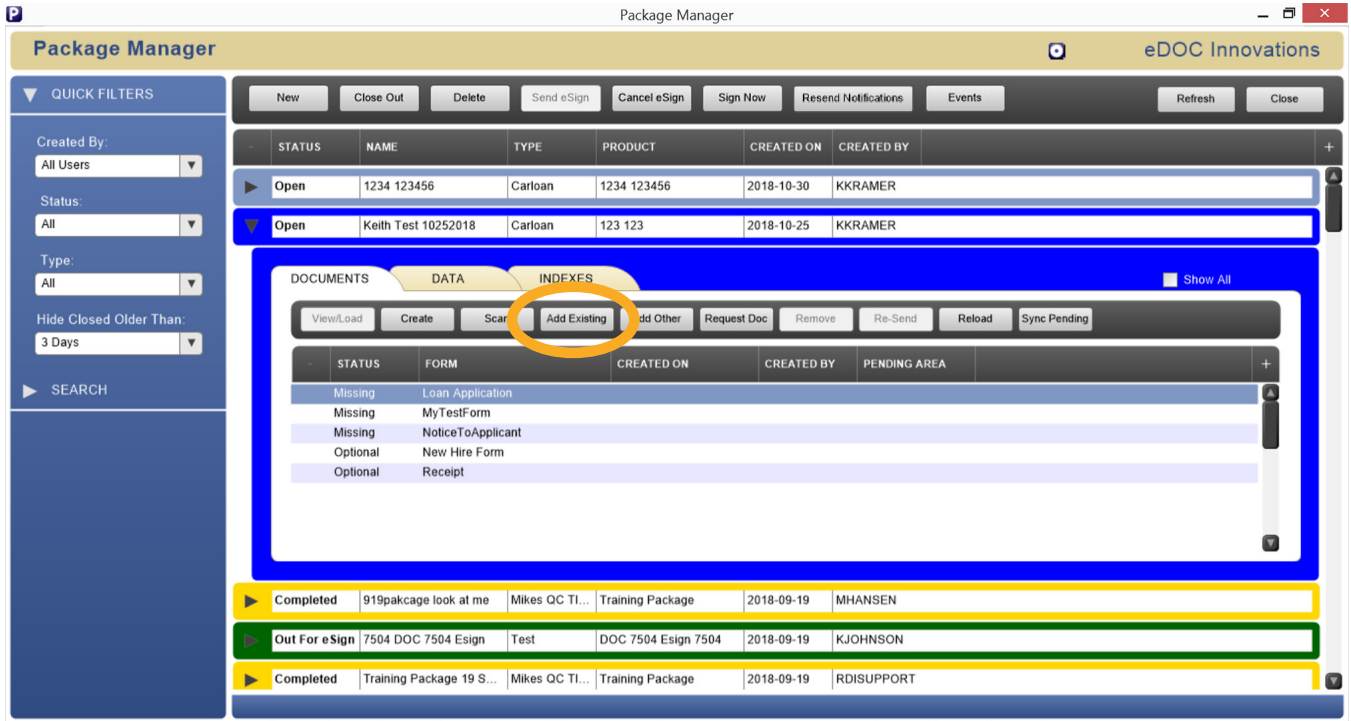


Continue adding forms to the package. Add the required **Missing** documents in the lists. **Optional** forms may be needed for some packages and not others.

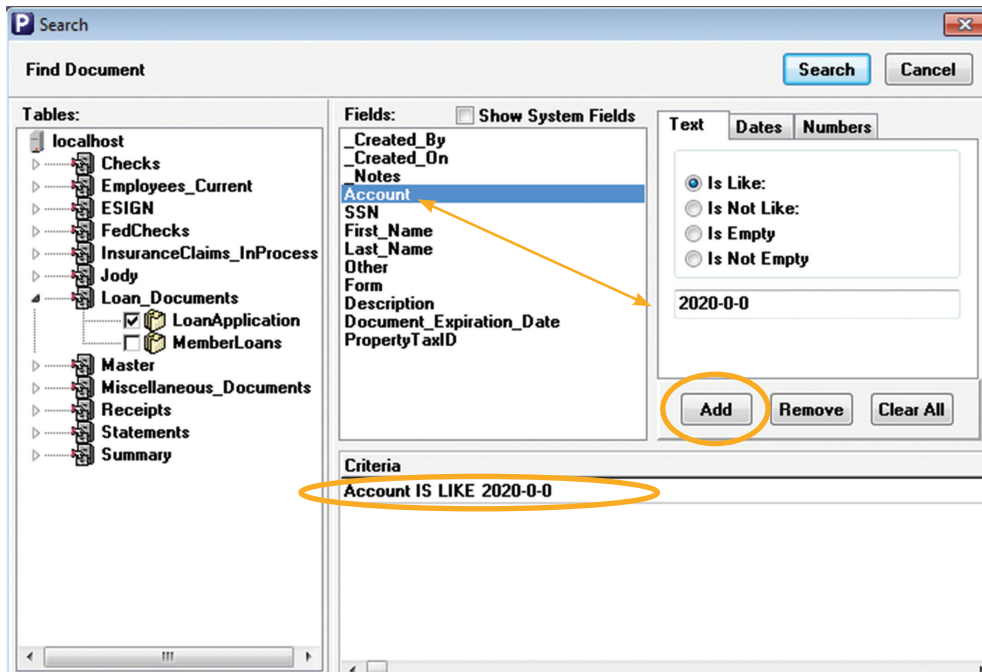
To add a form that is not in the package, click the **Add Other** button to open the **Document Selector** window. This will include the additional documents not in the original list. Use the **Scan** or **Create** button to add documents already in the list.



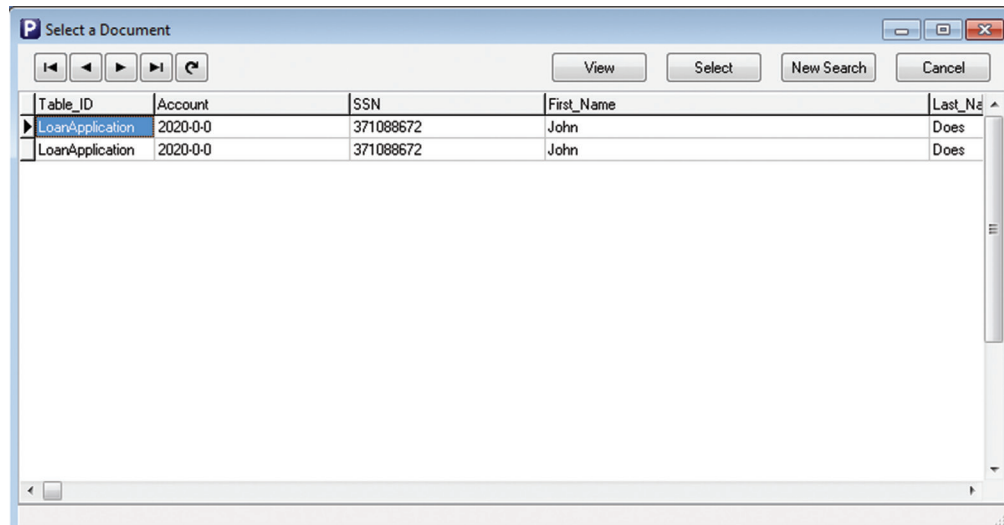
If there is an existing form in the database that is needed in the package, select **Add Existing** and query the DocLogic database. This will allow a user to associate the document with the package.



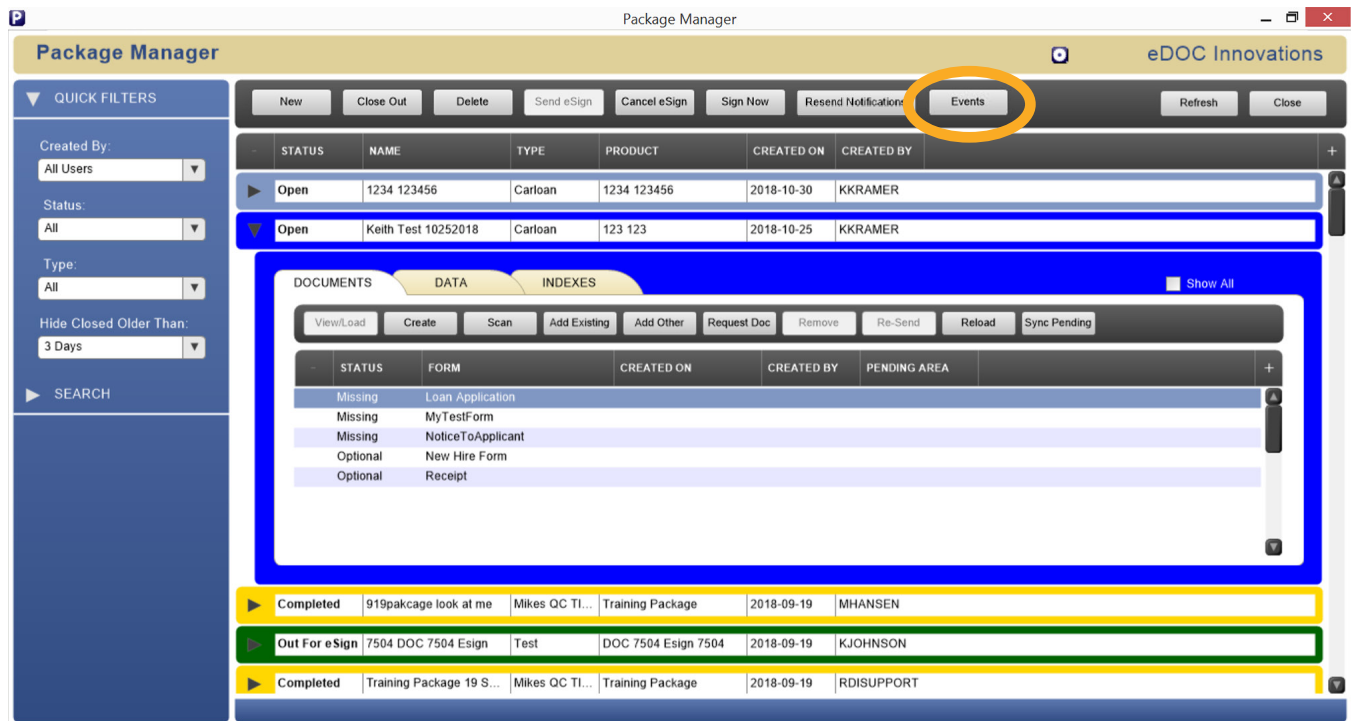
The **Add Existing** window will open the **Search/Find Document** window. Narrow the search by choosing a category in **Tables** and selecting **Fields**. In this example, the *Account* field was chosen and the account number was typed into the text box. Click **Add** to include information into the criteria box. Click **Search**.



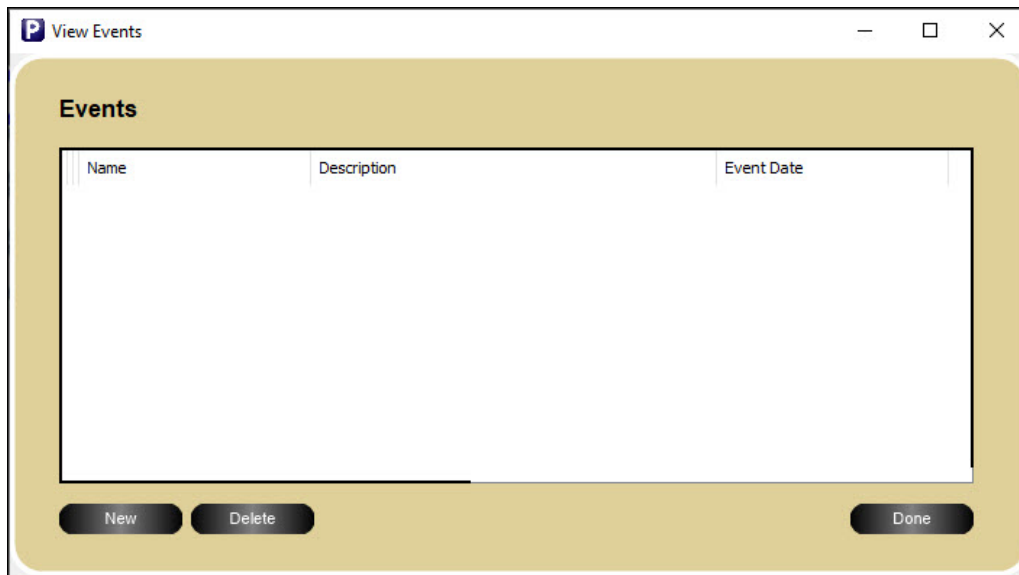
When the document is located, the **Select a Document** window will open. **View** the document or **Select** the document to add to the package. Clicking on **New Search** will open the **Find a Document** window where the user can re-search criteria.



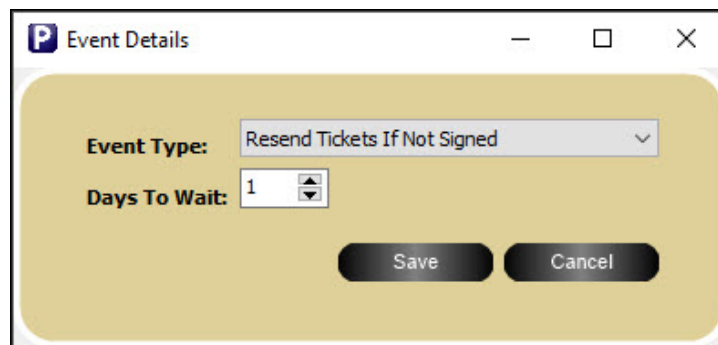
You can apply events to packages before they are sent out for signing. Events are actions that are automatically occur after a specified amount of time has passed. To add an event to the package, on the **Package Manager** window, click **Events**.



The **View Events** window appears.



To add a new event, click **New**. The **Event Details** window appears.



To add a new event, click **New**. In the window that appears, from the **Trigger Type** drop-down list, select an event type:

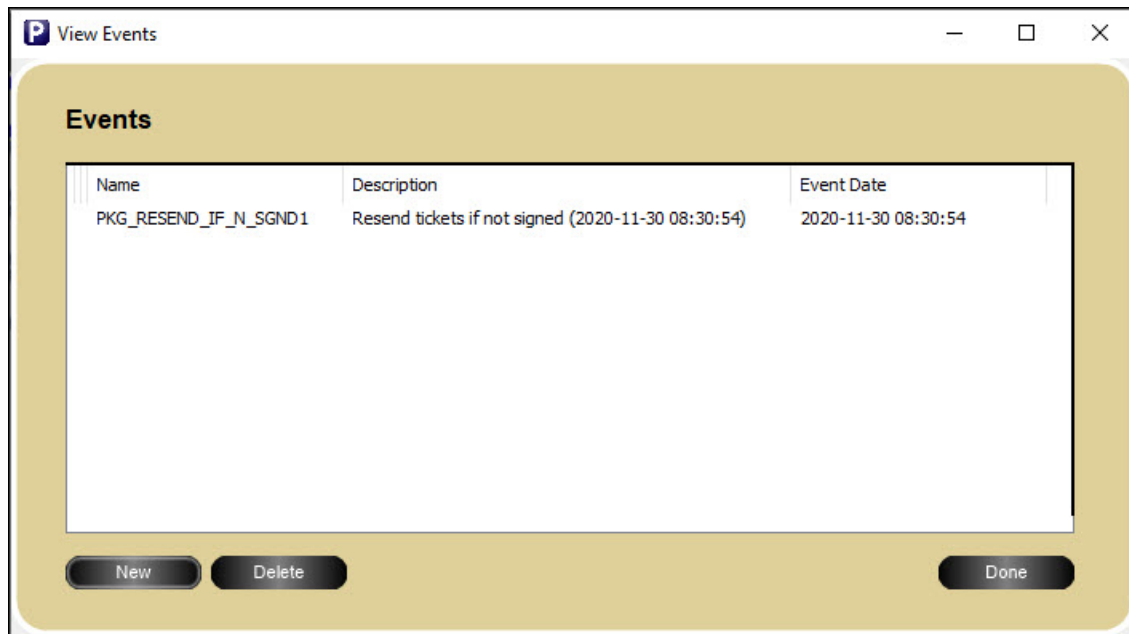
- **Resend Tickets If Not Signed** – Resends email notification to signer if not signed after the specified number of days.
- **Notify User If Not Signed** – Sends email notification to package creator if not signed after the specified number of days.
- **Delete Package If Not Signed** – Deletes package from the system if not signed after the specified number of days.

In the **Days to Wait** field, enter the number of days that must transpire before the event occurs.

When you are finished, click **Save**.



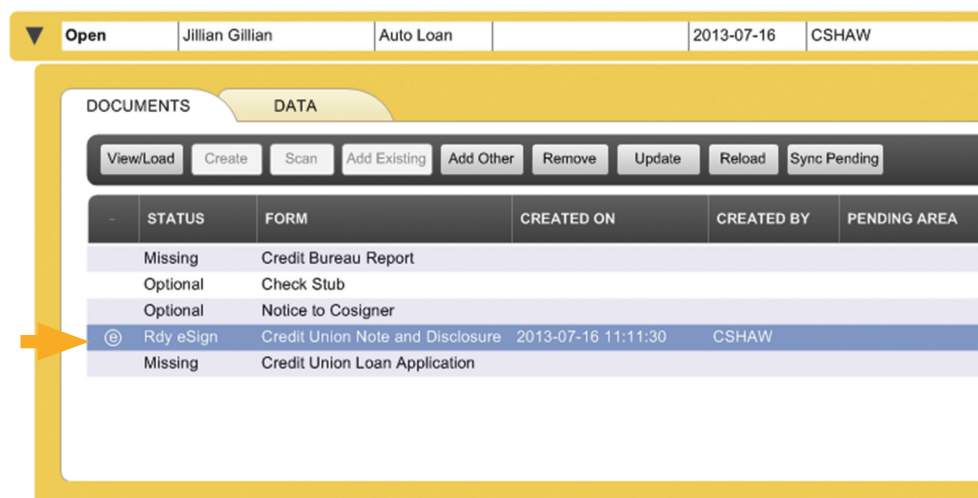
The event is added to the package and appears in your list of events on the **View Events** window.



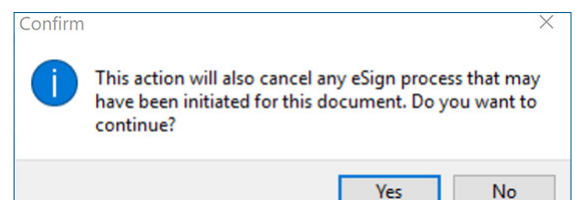
To add another event to the package, click **New** and follow the previous steps.

To delete an event from the package, select the event and click **Delete**. In the confirmation box that appears, click **Yes**. When you are finished adding events, click **Done** to return to the Package Manager screen.

Any document ready to be sent out for eSign or already out for eSign will have the symbol (e).



If you delete a document in a package, you will be prompted with a message that tells you that the eSign process will be canceled for that document.

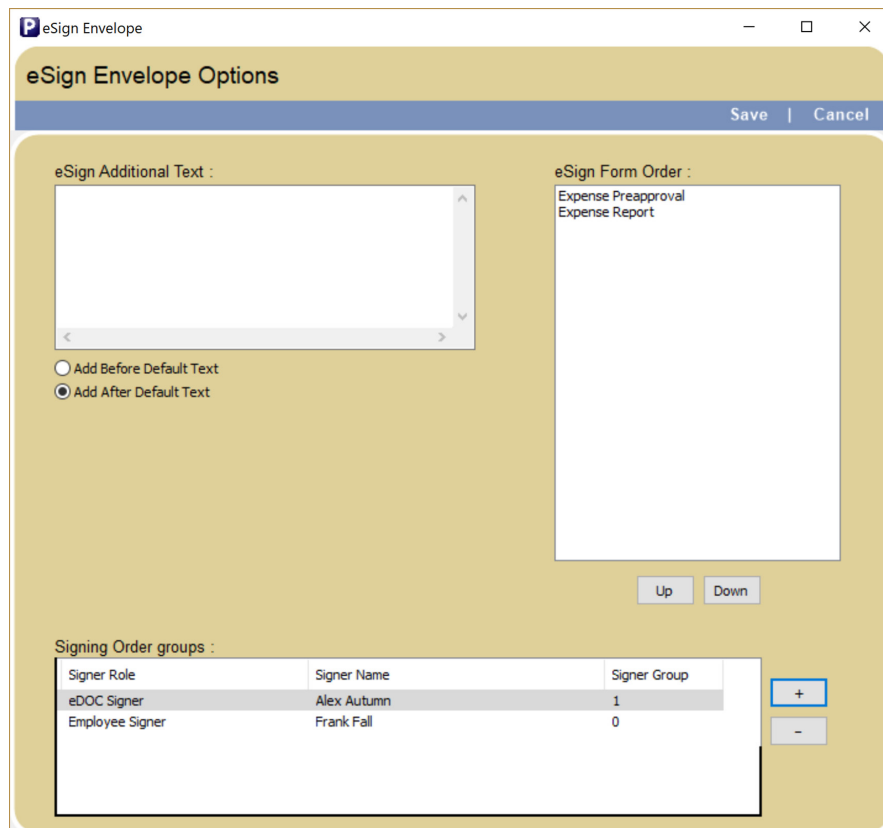
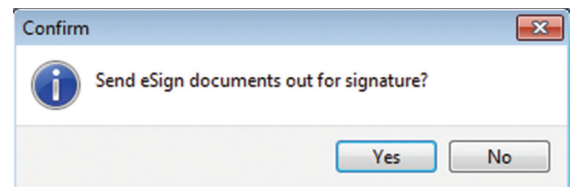


When all forms within a package are ready for eSign, highlight the package and select the **Send eSign** button at the top of the Package Manager screen.



A confirm window opens: **Send eSign documents out for signature?**

Click **Yes**. The **eSign Envelope Options** screen appears.



The email message sent to each signer can be personalized, and/or a default message can be used. The personalized message can be placed in the **eSign Additional Text** box.

Users can decide the order the forms will be sent by moving the forms up or down in the **eSign Form Order** window.

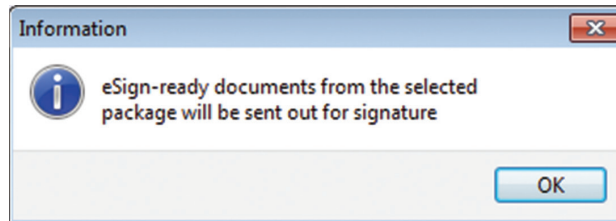
You can also assign the signing role and the order in which the documents will be signed by clicking on the plus and minus signs in the **Signing Order groups** area. In the example above, the Employee Signer, assigned “0”, will need to sign the documents before the eDOC Signer. The document this eDOC Signer will receive will already have the Employee Signer signature on it.

Click **Save** when finished.

An information window will open confirming that the document will be sent out for signature.

**Note:** *Emails are sent automatically every 1-5 minutes as a scheduled task.*

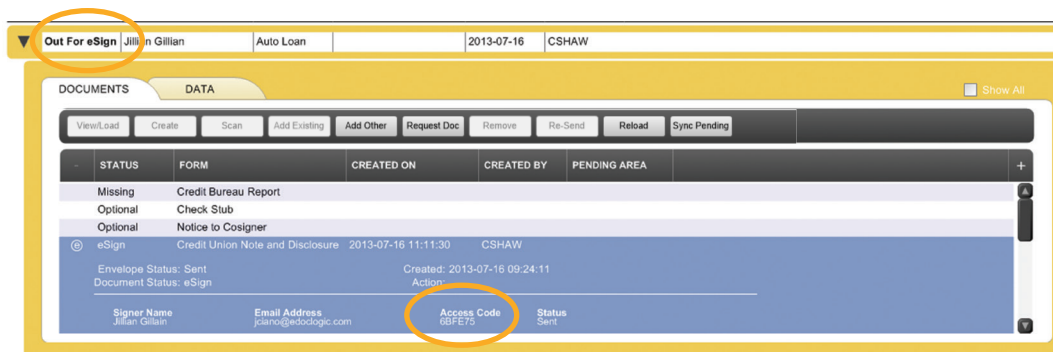
Click **OK**.



Contact the signer to give them their authorization code(s). Verify this is the correct individual before disclosing the code.

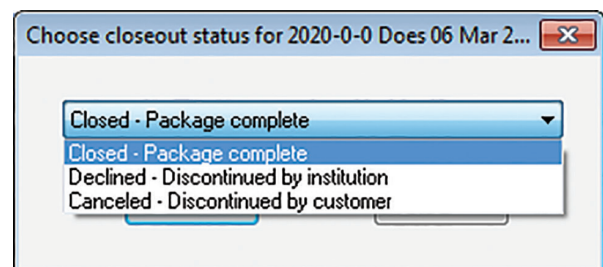
The package in **Package Manager** will change status to **Out for eSign** after the scheduled task has run. The **Access Code** seen in the figure below is also the authorization code. If a signer forgets their code, this is the easiest place to retrieve it.

Unless the institution has additional steps prior to closing out a Package, once all documents are completed and signed, the Package status should read closed.



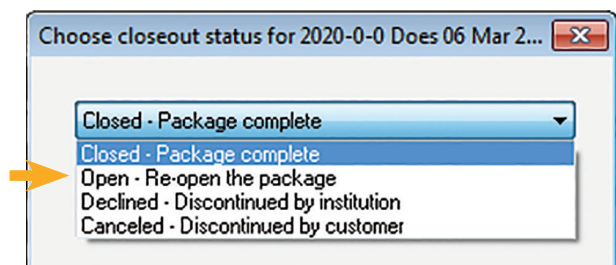
Clicking **Close Out** allows the user to close the current package with the selected status. If operating in remote mode, closing out a package will remove all associated documents from local storage.

If a customer wants to cancel the transaction at any time, the package can be canceled by highlighting the package and clicking on **Close Out**. Select **Canceled - Discontinued by customer**.



If the application is rejected by the institution, highlight the package and click **Close out** and select **Declined - Discontinued by institution**.

A package can be reopened by highlighting the package and clicking **Close Out** again. A confirmation window will open to ask if you are sure you want to change the status of a closed package? Click Yes. The Close Out window will reopen where the user can select **Open- Re-open the package**. The package will return to its status prior to closing, rejecting or canceling.



## ACCESSING RETURNED, SIGNED, AND, COMPLETED DOCUMENTS

Right-click on the ProDOC menu and select **Document Signing Status** to check the status of the documents. This will open to the **Manage Documents** page. The status of documents are color coded: Green means the document has been completed, yellow means the document is still out for eSign. Clicking on the colored bar will open a dropdown where you can access the document for review. Click on the icon to the left of the document's name.

**Setup...**

Upload...

Reload Form Definitions

---

**Create...**

Scan...

Load Pending...

---

Send Document for Signing...

Document Signing Status...

---

**Packages...**

Saved Documents...

---

Change Password...

Edit Users and Groups...

---

About ProDOC...

Log off JSNOW...

Exit

Package Results
?

Menu
Edit Search

	Package Name	Status	Created	Modified	Created By	
1	test 1122020	Out For eSign	12/01/2020	12/01/2020	EBURZ@QCSB	Edit
3	Eric T Loan Terms and Conditions 12	Completed	12/01/2020	12/01/2020	EBURZ@QCSB	Edit
1	request Test 11-24-2020	Waiting for Doc	11/24/2020	11/24/2020	EBURZ@QCSB	Edit
1	Loan Application	Out For eSign	11/19/2020	11/19/2020	EBURZ@QCSB	Edit
1	Loan Application	Out For eSign	11/18/2020	11/18/2020	EBURZ@QCSB	Edit
1	Application	Completed	11/10/2020	11/13/2020	EBURZ@QCSB	Edit
1	Application	Out For eSign	11/10/2020	11/10/2020	EBURZ@QCSB	Edit
1	IMG-2548 11-10-2020	Completed	11/10/2020	11/10/2020	EBURZ@QCSB	Edit
1	Fall Promotion	Out For eSign	11/09/2020	11/09/2020	EBURZ@QCSB	Edit
1	Testy Test Eric Test 11062020	Completed	11/06/2020	11/06/2020	EBURZ@QCSB	Edit

eDOC Signature Read: 4B421A337E448B8E4927C03A8F43  
Created: 03/28/2016 15:27:54 By: JCIANN@REED Locked: 03/29/2016 10:02:14

### Pre-Authorization Expense Form

Date: 3/28/16

Employee Name: Jane Winterhouse

Expense Description and/or Client Name

CU CONFERENCE

**Expense Authorization Details (Best estimates)**

Airfare: \$264.96 Mileage: \_\_\_\_\_

Hotel (i.e. # of Days \* \$125): 3 days @ \$325

Food (i.e. # of Days \* \$75): 3 days @ \$75

Incidental Expense (i.e. # of Days \* \$25): 3 days @ \$25 for taxis

Rental Car (i.e. # of Days \* \$150): \_\_\_\_\_

Month in which travel will occur: April 2016

Employee Signature

03/29/2016  
Date

Authorized Signature

03/29/2016  
Date

1197 Exchange Street, Suite 1, Middlebury Vermont 05753  
800.425.7766 edoecologic.com

Opening the document from the **Manage Document** page will provide the signed document and the timestamp of the signature in the upper left hand corner.

eDOC Signature Read: 1A770C37F9B746C2B04B779C102F38E  
Created: 03/28/2016 15:21:57 By: JCIANN@REED Locked: 03/28/2016 15:49:49

### Pre-Authorization Expense Form

Date: \_\_\_\_\_

Employee Name: \_\_\_\_\_

Expense Description and/or Client Name

\_\_\_\_\_

\_\_\_\_\_

**Expense Authorization Details (Best estimates)**

Another way to access audit information for documents sent out for eDOCSignature is via your idocVAULT. Log into idocVAULT and click the **Documents** or **Images** tab and search in the table where the document was stored. From the list, the signed document can be viewed by just clicking on it. To view the audit information with the signed document, click on the right arrow. This will change the view to the view you see below.

Account	Form	Suffix	Origination Date	SSN	First Name	Last Name
123456	Loan Application			987321654	lsweep download	trest
123	NoticeToApplicant			123456789	456	789
123	Loan Application			123456789	456	789
	View Document with Audit Data			123456789	KarlNewRequest	JohnsonTest
	Loan Application					
	MIKE_FORM_OF_DOOM					
	MIKE_FORM_OF_DOOM					
	MIKE_FORM_OF_DOOM					
222222	MIKE_FORM_OF_DOOM			8234938498374	1 time auth	last 1 time auth
123654789	MIKE_FORM_OF_DOOM					
	MIKE_FORM_OF_DOOM					
1212	MyTestForm			123121234	bedrock	union
1234567890	MIKE_FORM_OF_DOOM					
	MIKE_FORM_OF_DOOM					
1234567890	Loan Application	123		123456789	Signed	Keith
123456780	Loan Application			123456789	Unsigned	Kramer
	MIKE_FORM_OF_DOOM					
	MIKE_FORM_OF_DOOM					
	Banded					

From this screen, clicking on the arrow icon to the left will open the signed doc with no audit information. Clicking the icon to the right will open the signed doc with the audit information appended to the end of the document.

EmployerID	Last Name	First Name	Name	Expense	EPT	Date	Amount	Check Number	Check Date	Form	Created By	Created On
123456	Risk	Roger		0.00						Expense Report	LOGES	2016-03-25 11:20:36
	TestLast	Test2		0.00						Expense Report	KJOHNSON	2016-03-28 17:24:24
	test2	test		0.00						Expense	KJOHNSON	2016-03-16 14:47:58
	test	test		0.00						Expense	KJOHNSON	2016-03-28 14:39:20
	test	test		0.00						Expense	KJOHNSON	2016-03-16 13:10:28
	test	test		0.00						Expense	KJOHNSON	2016-03-16 17:35:18
	test	test		0.00						Expense	KJOHNSON	2016-03-16 16:14:25
	test	test		0.00						Expense	KJOHNSON	2016-03-16 15:14:25
	test	test		0.00						Expense	KJOHNSON	2016-03-16 15:08:25
	test	test		0.00						Expense	KJOHNSON	2016-03-16 14:27:52
	Piero	Mark		600.00						Expense	MFIERRO	2016-03-16 14:27:52
	Weekes	Bret		570.21						Expense	BWEEKES	2016-03-15 14:21:10
										Expense	BWEEKES	2016-03-15 09:34:58
										Expense Form	KJOHNSON	2016-03-14 13:41:40
										Expense Form	KJOHNSON	2016-03-11 23:23:08
100	TestJohnson	TestKarl		2016-01-01 00:00:00	100	100		2016-01-01 00:00:00		Expense Form	KJOHNSON	2016-03-10 20:31:02
	test	test		0.00						Expense Report	KJOHNSON	2016-03-10 15:15:02
	test	test		0.00						Expense Report	KJOHNSON	2016-03-07 12:08:20
	Johnson	Karl		50.00						Expense	KJOHNSON	2016-02-29 12:44:42
				0.00						Expense	KJOHNSON	2016-02-16 14:42:26
	test	test		0.00						Expense	KJOHNSON	2016-02-16 13:53:02
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
	test	test		0.00						Expense	KJOHNSON	2016-02-16 12:14:25
123456789	TestJohnson	TestKarl		2016-01-01 00:00:00	10.02	001		2016-01-01 00:00:00		Expense Report	KJOHNSON	2016-02-11 14:42:26
	Outlook	Bret		1234.00						Expense	BWEEKES	2016-02-10 15:15:10
	Weekes	iPhone		175.00						Expense	BWEEKES	2016-02-10 14:41:20

**eDOC Signature Document Signing Audit Information**

Doc ID: 7722678068041P-9A182P6438E5878-1  
 Package Name: Calculate Test\_CALCIBENDQ\_20181001\_138607  
 Form Name: Calculate Test  
 Created On: 10/01/2018 13:55:07  
 Created By: JCALIBENDQ@GOCJAKE

Sign Set ID: 1837390P-9064249P-830U8CA4780C60  
 Signer Name: Jane Calabro  
 Signer Email: jcalabro@prodoc.com  
 Auth Code Verified  
 Certificate Version: DEF AULT  
 EULA Version: 10-14-2016  
 Agreement Completed

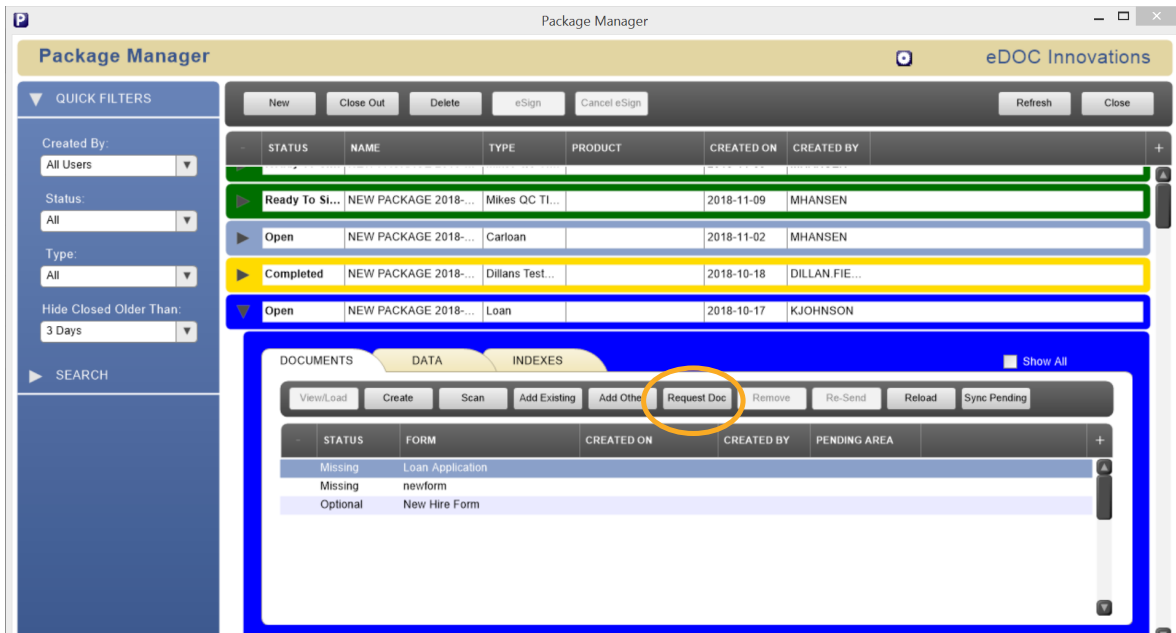
Signed Signature: "This is my Name"  
*This is my Name*  
 Signed Initials: "Timn"  
*Timn*

ID	Type	Clicked From	Clicked On	Value
1	Date	172.56.11.222	2018-10-01 14:05:09:021	
2	Signature	172.56.11.222	2018-10-01 14:05:10:362	
3	Initials	172.56.11.222	2018-10-01 14:05:11:082	
4	Check Box	Not Clicked		

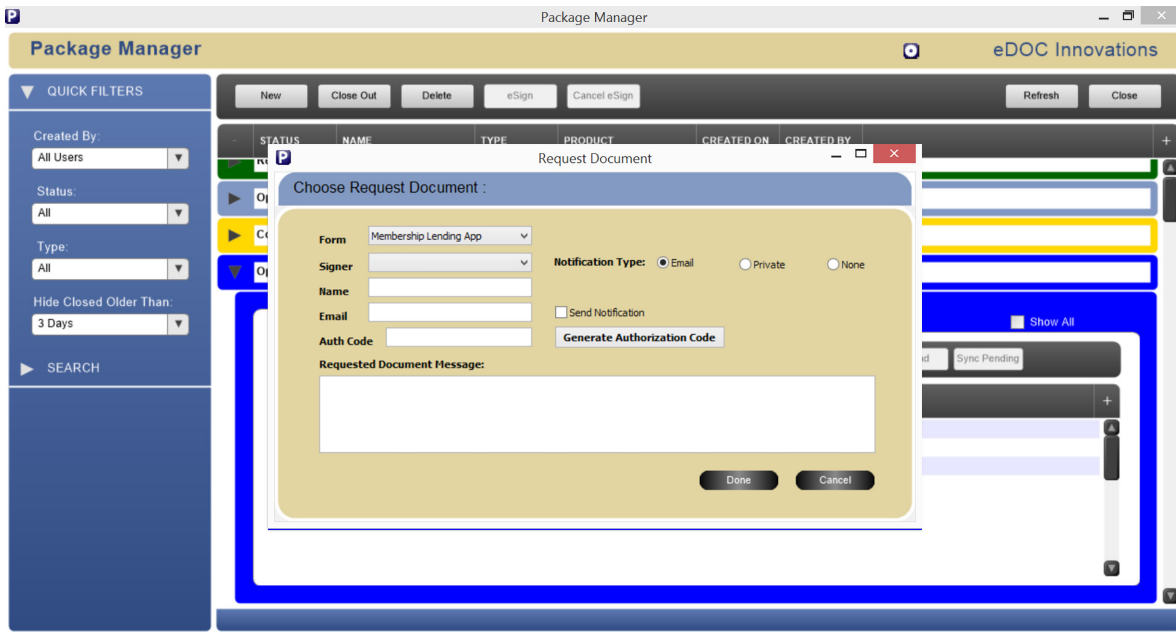
Locked On: 10/01/2018 14:05:13

*Request Doc*

To request a document from a signer, click the **Request Doc** button.



Fill in the information for the request and click **Done**. If the **Send Notification** box is unchecked, the request will be sent with the rest of the package. If you select this box, the request will be sent immediately.



The signer will receive a notification.

When the requested document is uploaded into the package, indexing for that package is automatically added to it.

**Request for Document**

Hello Angela Weekes,

eDOC Innovations Inc. has requested a document from you. To begin, click the "Upload Document" link below. You can securely upload your document from your computer, tablet, or other mobile device.

[Upload Document](#)

This message was sent to you by Angela Weekes using eDOCSignature® powered by eDOC innovations. If you do not want to submit your document electronically or have questions about the document or the digital transaction process, please contact Angela Weekes at [angela.weekes@edoclogic.com](mailto:angela.weekes@edoclogic.com).

**Do Not Share this Email or Authorization Codes**

This email contains a link that allows access to a document in the eDOCSignature® system. This document may contain your personal information. You should protect this email and any associated authorization codes as you would the information itself.

**About eDOCSignature**

Adopt an electronic signature solution that goes beyond the basics to capture the speed and

**View Document**

Form Name:

Account:

SSN:

First\_Name:

Last\_Name:

Other:

Created On:

Created By:

Items in yellow do not match package data

The package will show the requested document status as **Requested**. When the signer uploads their requested documentation, it will be added to the package and the status will change to **Saved**.

**Package Manager** eDOC Innovations

QUICK FILTERS

Created By:

Status:

Type:

Hide Closed Older Than:

SEARCH

Buttons: New, Close Out, Delete, eSign, Cancel eSign, Refresh, Close

STATUS	NAME	TYPE	PRODUCT	CREATED ON	CREATED BY
Ready to Sign	NEW PACKAGE 2018-...	MIRAS M...		2018-11-02	MHANSEN
Open	NEW PACKAGE 2018-...	Carloan		2018-11-02	MHANSEN
Completed	NEW PACKAGE 2018-...	Dillans Test...		2018-10-18	DILLAN FIE...
Open	NEW PACKAGE 2018-...	Loan		2018-10-17	KJOHNSON

DOCUMENTS DATA INDEXES Show All

Buttons: View/Load, Create, Scan, Add Existing, Add Other, Request Doc, Remove, Re-Send, Reload, Sync Pending

STATUS	FORM	CREATED ON	CREATED BY	PENDING AREA
Optional	New Hire Form			
Missing	newform			
Requested	Loan Application			

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