2020iDOC Administrator Guide

Administrative Features

INTRODUCTION

This book will cover the administrative features of 2020*i*DOC including changing a password, adding a new user, and deleting a user.

CONTENTS

Revision date: June 26, 2009

For an updated copy of this booklet, check out the Reference Materials page of our website:
http://www.cuanswers.com/client_reference.php

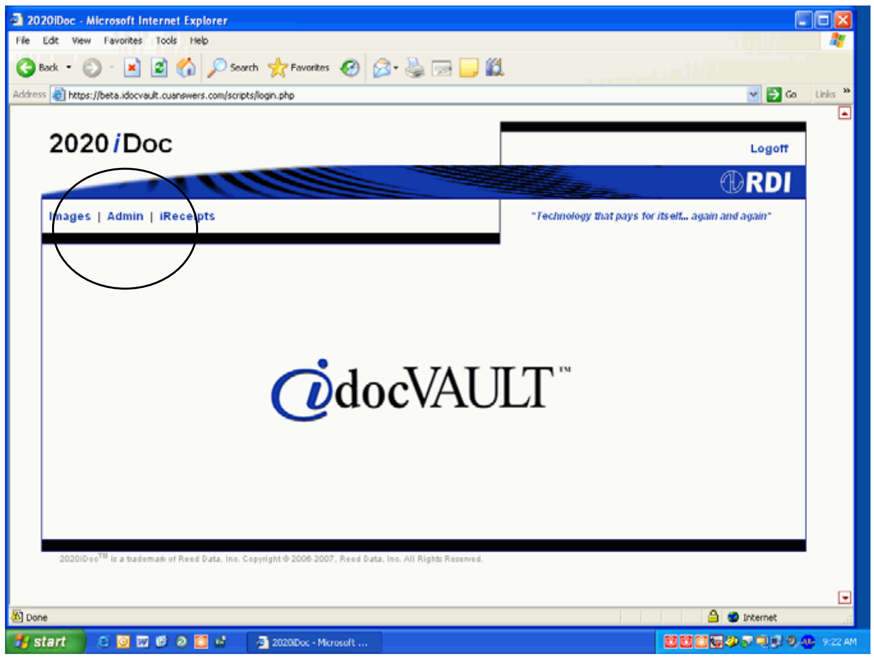
ENTERING THE 2020iDOC BROWSER WINDOW

In order to do all of the activities in this manual, the administrator must first log into the 2020*i*DOC browser window and click on the Admin link.

1. Click on the 2020*i*DOC icon on your desktop to open the 2020*i*DOC browser window.

2. Click on Admin.

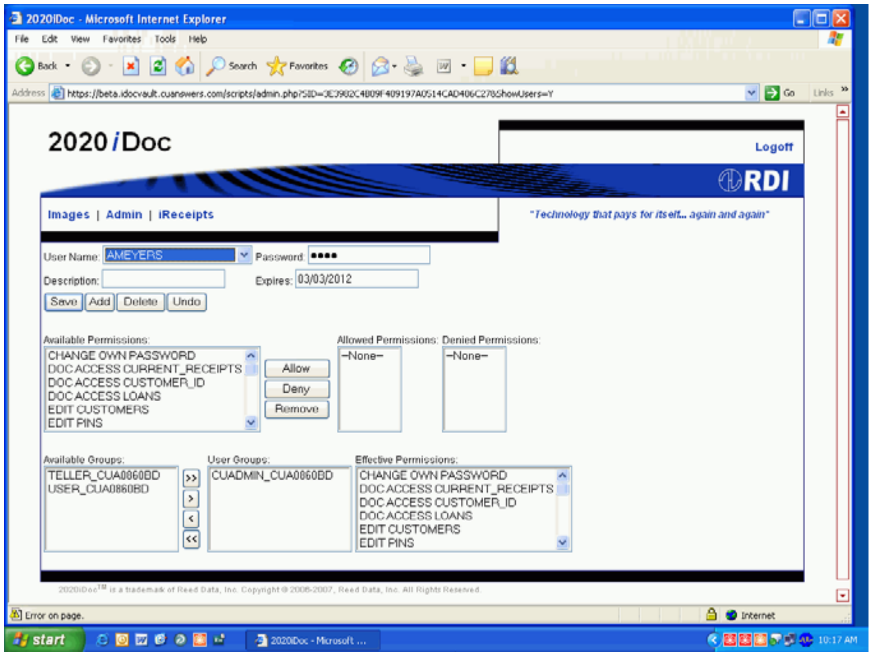
2020iDOC Screen



3. You are now in the Administrator view of this screen.

> *Users who are not in the Admin group can only change their passwords when they click on Admin from this screen.*

Administrator Page in the 2020iDOC browser window



CHANGING THE ADMINISTRATOR PASSWORD

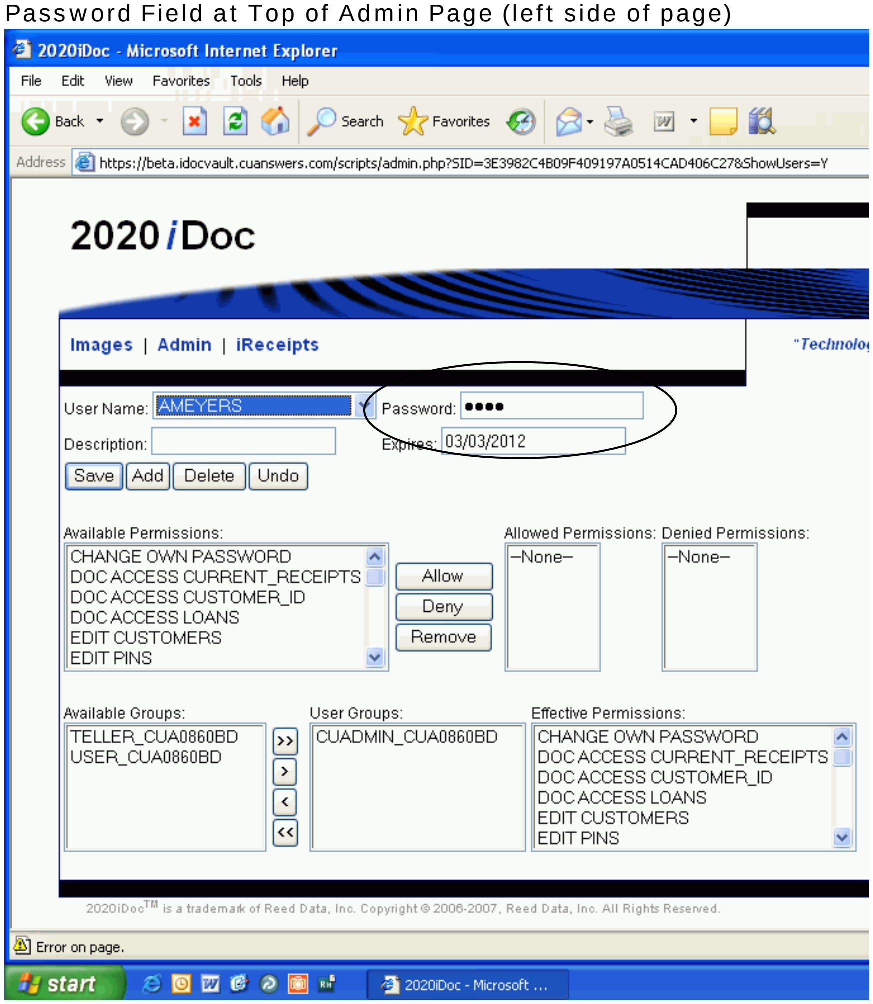
To change your password, simply type in a new password in the Password field and click save. Tellers are asked to confirm their change, but administrators are not asked for confirmation so take care to type the correct password in this field.

> *This password is used as a login to both the 2020iDOC browser window and to ProDOC.*

1. Enter the 2020*i*DOC browser window. See first section in this book.

2. Type in a new password in the Password field.

Password Field at Top of Admin Page (left side of page)



3. Click Save.

4. Close the browser window or click Logoff to exit this screen. If you need to add or delete users or change their permissions, stay on this screen.

ADDING AND DELETING A USER

As an administrator user, you will need to add delete users from the 2020*i*DOC system.

ADDING A USER

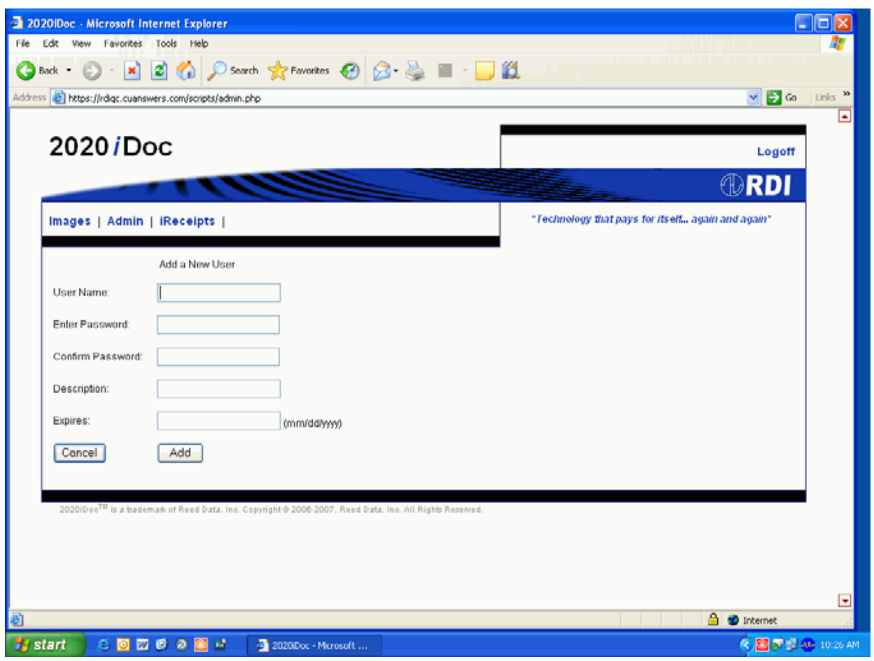
You may need to add new users to 2020*i*DOC.

> *This gives the user a login to both the 2020iDOC browser window and also to ProDOC.*

1.) To learn how to enter the Admin screen go to page 2.

2.) From the Admin screen, click Add. You will see the following screen.

The Add a New User Screen



3.) Enter information in the fields.

- Enter the User Name, Password and Confirm the password.
- Enter the Description. This is only used by the Administrator User to identify the user. A good rule of thumb is to type the full name of the user here.

- It is not necessary to enter a date in the Expires field. A default date will be entered for you.

4.) Click Add.

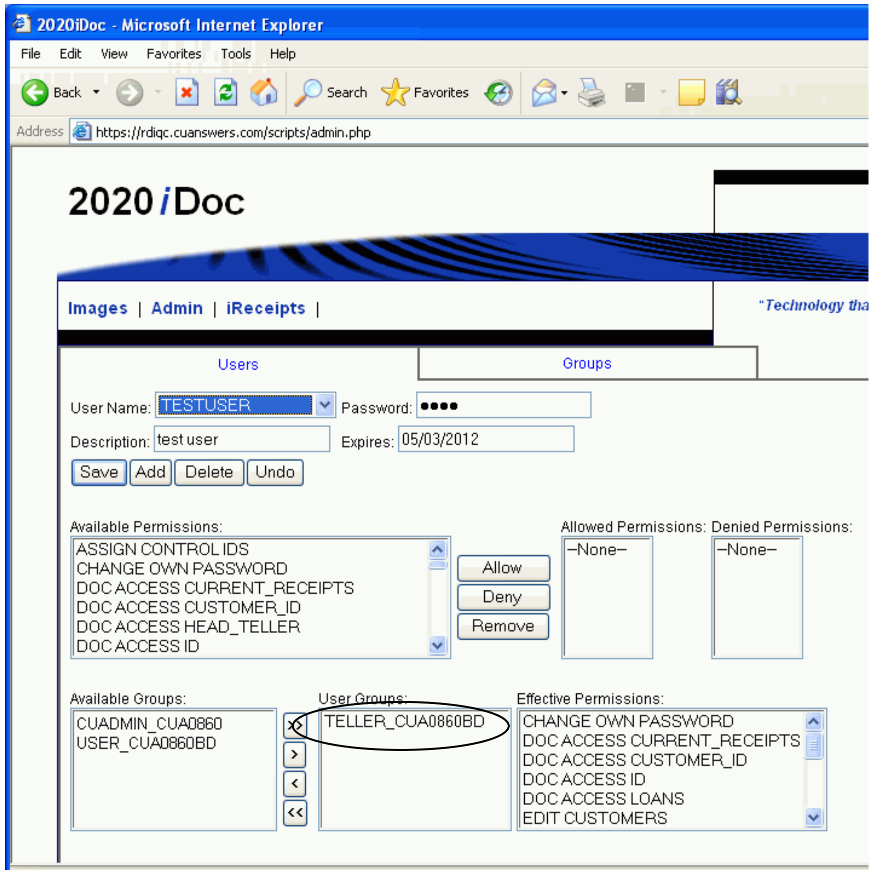
5.) Now it is time to add the user to a group.

There are three levels of users that you can add to the system. Below is a chart with the types of users you can add and the reasons for creating a user at each level.

Group	*Description*
CUAdmin	This group is used for only Administrative Users and is designed to be used by only a few people at each credit union. You have been assigned to this group. A user in this group has the ability to add and delete users and to change users' permissions. This user can search for items in the 2020*i*DOC browser window. This user can also log into ProDOC to create receipts, scan photo IDs and produce any other forms created using ProDOC.
Teller	This group is designed to be used by tellers. This user can search for items in the 2020*i*DOC™ browser window. This user can also log into ProDOC to create receipts, scan photo IDs, and produce any other forms created using ProDOC.
User	This group is designed to be used by non-tellers such as loan officers that may need access to 2020*i*DOC. This user can search for items in the 2020*i*DOC browser window. This user can also log into ProDOC to create receipts, scan photo IDs, and produce any other forms created using ProDOC. Use this group if you intend on giving the user different permissions than a teller. (You will generally add users to either the CUAdmin or Teller groups.)

6.) Select a group from the list and click .

Adding a User to a Group (left section of screen shown)



> *This user in the image below has been added to the Teller group. At a later date this user could be added the CUAdmin group instead if additional permissions are needed.*

7.) Click Save.

8.) The user is now able to log into both the 2020*i*DOC browser window and also to ProDOC.

Deleting a User

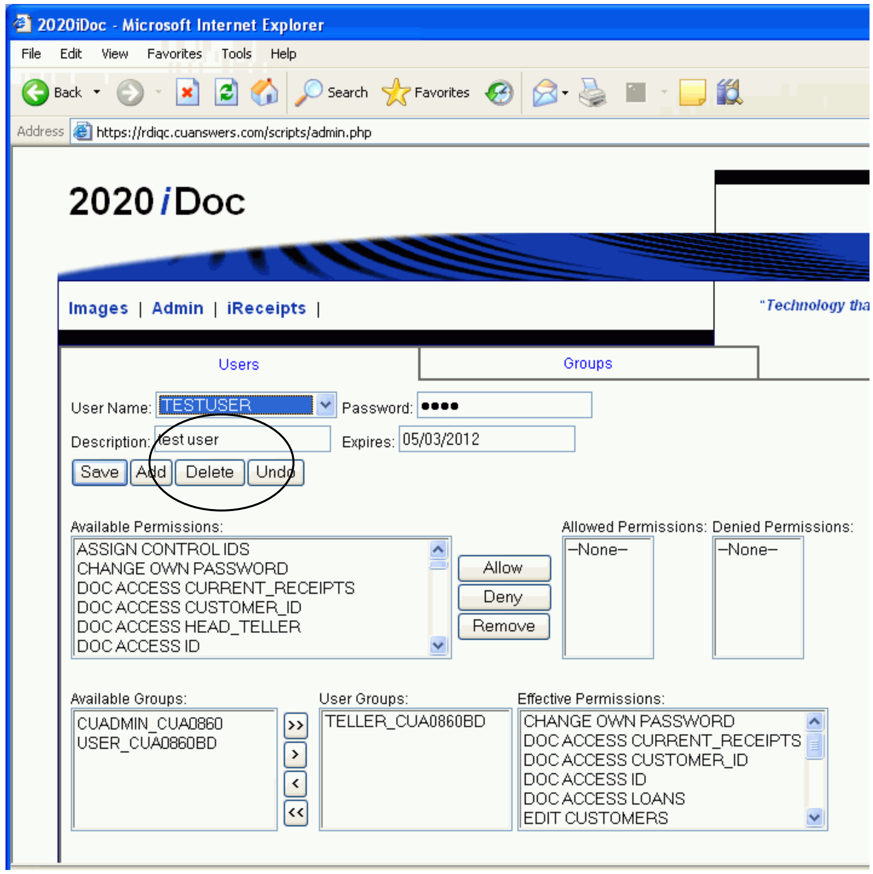
You may need to delete a user when they are no longer working for your credit union or if they no longer need access to ProDOC and the 2020*i*DOC browser window.

1.) To learn how to enter the Admin screen go to page 2.

2.) From the Admin screen, select the user from the User Name drop-down menu.

3.) Click Delete.

Deleting a User (left section of window shown)



4.) Click OK.

5.) The user is now deleted and cannot log into the 2020*i*DOC browser window or ProDOC.

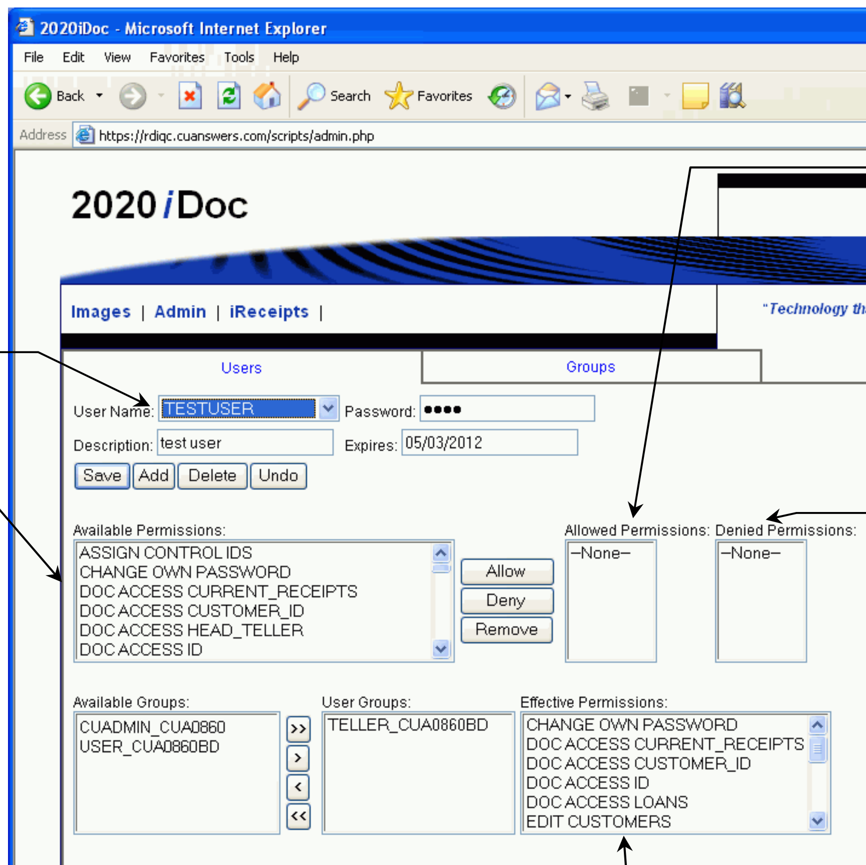
CHANGING USER PERMISSIONS

Generally you will not need to adjust a user's permissions since changing the users group designation will generally cover permission changes that are needed. If you do need to add or delete permissions, you can do this from the Admin screen.

1. Begin by entering the Admin area. See page 2. You will see the screen pictured below.
2. Select the user's name from the User drop-down menu.
3. Add, delete, and remove permissions by selecting the permission and then clicking the "Allow," "Deny", or "Remove" buttons.
4. Click Save to save the changes.

Below is an explanation of what the different areas of the screen.

Admin Screen (left half section of window shown)



Select the user from the User Name drop-down menu.

The **Available Permissions** area lists the permissions of the person currently logged in. In your case, these are your permissions, the permissions given to the CUADMIN group. These are the permissions you can Allow or Deny the selected user.

The **Allowed Permissions** area lists the permissions that you grant the user that are in addition to his or her Effective Permissions. Click the Allow button to move permissions into this area.

The **Denied Permissions** are lists the permissions that the selected user is not given. This overrides the Effective Permission list. Click the Deny button to move permissions into this area.

The **Effective Permission** list includes the permissions that the user received from being in his or her group. In this example these are the permissions granted to the TELLER group.

PERMISSIONS DEFINED

The following is a list of more commonly used permissions with their definitions. All of these permissions have been given to users in the Admin group.

Permission	*Explanation of Permission*
DOC Access XXXXX	Given to all users—allows for the viewing of specific tables.
Change own passwords	Given to all users—allows the user to change his or her password.
Edit Users	Admin only permission. Allows the user to edit user permissions.
View Audit Logs	Admin only permission. Allows the user to view audit logs.
ProDOC Add/Modify Forms	Admin only permission. Allows a user to create new forms or to modify existing ones. Requires the "ProDOC Change Settings" permission.
ProDOC Change Settings	Admin only permission. Allows a user to edit all settings in ProDOC Setup Dialog. With this permission, users may only edit printer and Signature Dialog settings which appear on the General tab.
ProDOC Delete Forms	Usually an Admin only permission. Allows a user to delete forms.
ProDOC Delete Pending	Allows a user to delete a document saved in the pending area.
ProDOC Forms XXXXX	This is used to filter the forms and is overridden by the "View All Forms" box in the Setup Dialog. The % is replaced with a Form Name—the actual permission would be "ProDOC Form Loan Application" or "ProDOC Form Customer ID." The ProDOC Forms %s priviledges are only for limiting the contents of the Form Name drop-down menu in ProDOC. This permission is more of a convenience item. It is intended to limit the number of forms a user might see in the list so that he or she only sees the forms he or she uses. This setting can be overridden by checking the "Show All Forms" box in the Setup dialog.
ProDOC Process Forms	Allows a user to create and save forms.
ProDOC Process Receipts	Allows a user to create and save receipts.

The following is a list of less commonly used permissions. Many of these permissions are not applicable until online statements through RDI (Reed Data, Inc.) are implemented. All of these permissions have been given to users in the CUAAdmin_CUA group.

Permission	*Explanation of Permission*
Edit Customers	Allows a user to edit email addresses, etc. for CU members.
Process Enrollments	Allows a user to edit the setup and import of notices into the system. In this context, these are notices, such as “Insufficient Funds” or “CD Maturity” that are normally sent to members.
Process Notices	Allows a user to run batch sends for notices.
Process Statements	Allows a user to process statements.
Send Emails	Allows a user to send emails.
Send Notices	Allows a user to run batch email sends for notices.
Setup Statements	Allows a user to setup statements.
View Customers	Allows a user to view member information, for example email addresses.
View Notices	Allows a user to view notices.
View Secure Statements	Allows a user to view statements and checks from “secured accounts.”
View Statements	Allows the user to view statements.