

# **Fiserv UniFi Pro Mortgage System DocMagic Interface Guide**

Version 1.0



Document Systems, Inc.  
20501 South Avalon blvd., Suite B  
Carson, CA 90746  
(800) 649-1362  
<http://www.docmagic.com>  
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This document provides information regarding clients using Fiserv's *UniFi PRO Mortgage System* platform.

## **1. Background**

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### **1.1. Interface**

- ❑ Seamless DocMagic Direct integration.

### **1.2. Account**

- ❑ Before utilizing this interface, the client must have an account with DSI.

### **1.3. Plan Management**

- ❑ Plan management is performed through DSI's Account Administration system

### **1.4. Software Requirements**

- ❑ UniFi PRO Mortgage System Version 5.2 and above
- ❑ UniFi PRO's semiannual 07A Update Release
- ❑ Latest UniFi PRO System "CB" Engine Update
- ❑ Latest UniFi PRO System Fiserv Remote Document Provider Update

## 2. Configuring DocMagic Services

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### 2.1. Abbreviated Installation Steps

#### 2.1.1. UniFi PRO System “CB” Engine Update

The latest UniFi PRO System “CB” Engine Update is required and must first be applied. The update is located on the Internet under the Technical Support folder. If the “CB” Engine Update is not available, contact your Fiserv Representative.

#### 2.1.2. Dependency Updates

The latest dependencies with UniFi PRO updates and software are required. The update is located on the Internet under the Technical Support folder. If the appropriate software requirements and updates are not available, contact your Fiserv Representative.

- a. Database dependencies
- b. The 07A Update Release
- c. Communication server

#### 2.1.3. Remote Document Provider Update

The latest UniFi PRO System Fiserv Remote Document Provider Update for your selected connection must be installed next. The Fiserv Remote Document Provider interface utilizes the user-defined bureau number range of 80-99. Available bureau numbers in this range shall automatically display upon running of this update and allow selection. Future updates for this interface shall begin with “CBRD” and be followed by the letter “I”, indicating HTTPS connectivity. The remaining three digits reflect the latest update/version number.

An example of a Fiserv Remote Document Provider update is:

CBRDIxxx (where RDI reflects Remote Document Interface and xxx reflects the latest update/version number)

Complete instructions for applying system updates are found in the UniFi PRO Mortgage Application Administration Guide, Utilities chapter.

#### 2.1.4. Document Interface Configuration

Configure document interface pre-installation communicator – Remote Documents Interface Setup Screen. The pre-installation setup must run on the communication server computer.

#### 2.1.5. Document Vendor Designation

Designate document vendor number - Remote Documents Interface Setup Screen. The vendor number setup must be run on the communication server computer.

#### 2.1.6. Interface Configuration

Configure Interface - Vendor Communication Parameters Screen.

#### 2.1.7. Product Customization

Customize the base products delivered with this interface or create custom products using the Vendor Product Parameters screen.

### 2.1.8. Employee Setup

Setup the employees using the Employee Interface Data screen. Complete instructions for applying employee interface data can be found in the UniFi PRO Mortgage Application Administration Guide.

### 2.1.9. Connectivity Validation

Test your connection after the installation and configuration.

This completes your installation process.

## 2.2. *Remote Documents Interface Setup*

From the **System Admin** node on the Navigation Tree, select **RDI Installation**. On the Document Vendor Interface Installation screen (CBRDOC01), specify the UniFi Vendor Number. This is 81 for DocMagic. The Vendor Communication and Vendor Product Parameters are preset for DocMagic.

### 2.2.1. Vendor Products

The Vendor Product code is used to convey data that is required by DocMagic. This information is not viewable in the order screen but is applied to the submission from a loan product level. From the **System Admin** node on the Navigation Tree, select **Vendor Product Setup**.

The screenshot shows the 'Vendor Product Parameters' configuration screen. Key fields include: 'Active' (checked), 'UniFi Vendor Number' (081), 'Vendor Name' (Doc\_Magic), 'UniFi Inquiry Number' (008), 'Service Type' (Vendor Product), 'Product Code' (CONV), 'Product Name' (Conventional Fixed Rate), 'CNA Type1' (00), 'Type2' (00), 'CNA Default' (000000), 'Repository' (dropdown), 'Report/Timer Type' (Infile/second selected), and 'Interface Parameters To Modify' (dropdown). A 'Link to Products' button is also visible.

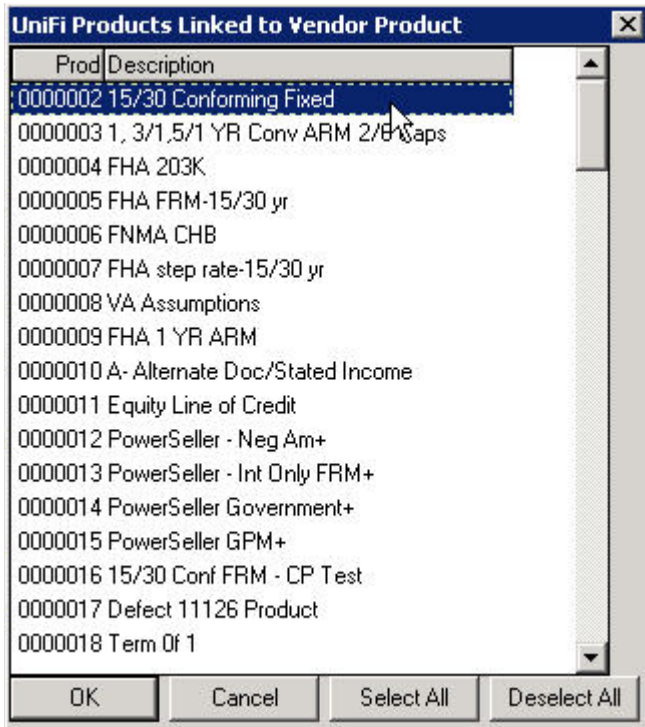
Figure 1

Click the New Record icon. Select the **Vendor Product** option from the Service Type dropdown.

In the **Product Code** field, enter the DocMagic **Plan Code**. In the **Product Name** field, enter a brief description for the Loan Product.

### 2.2.2. Link Vendor Products to UniFi Products

Once the Vendor Product has been defined, click the **Link to Products** button to display the **UniFi Products Linked to Vendor Products** dialog. This dialog will allow you to link the UniFi PRO products to the corresponding Vendor Products. *Note: This button will only be active on those records with a Service Type of **Vendor Product**.*



**Figure 2**

Select the appropriate UniFi PRO product(s) and click **OK** when finished.

### 3. Accessing DocMagic Services

#### 3.1. Remote Document Interface Request

From the **Processing** node on the Navigation Tree, select **Fiserv RDI**. The **Remote Document Interface Request Screen** allows you to order document packages and/or services from DocMagic. The browser will display all requests that have been made.



The screenshot displays the 'Remote Document Interface' window. At the top, there are tabs for 'Request' and 'Response'. Below the tabs is a table with the following data:

Nbr	Company	Doc. Package	Status	Date Requested	Time Requested	Date Received	Time Received
041	Doc_Magic	300	Received	07/06/2007	9:36 AM	07/06/2007	9:38 AM
040	Doc_Magic	200	Received	07/03/2007	3:02 PM	07/03/2007	4:37 PM
039	Doc_Magic	300	Received	06/28/2007	9:33 PM	06/28/2007	9:35 PM
038	Doc_Magic	300	Received	06/26/2007	5:07 PM	06/26/2007	5:08 PM
037	Doc_Magic	300	Received	06/26/2007	2:14 PM	06/26/2007	2:16 PM
036	Doc_Magic	300	Received	06/19/2007	12:46 PM	06/19/2007	12:48 PM

Below the table is a form for creating a new request. The form includes the following fields and buttons:

- Status: PENDING
- UniFi Vendor Number: 081 (with a dropdown arrow icon)
- Product Code: 100 (with a dropdown arrow icon)
- Add On Service Code: In-Hou (with a dropdown arrow icon)
- 3rd Party Email Address: (empty field with a dropdown arrow icon)
- Place Pending Orders button
- Retrieve Response button
- View Documents button

Figure 3

1. From the request screen, click the **New** icon, , to create a new request. The system will pre-fill the UniFi Vendor Number, Name, and Service Type based on the Interface Vendor Setup.
2. Select the **Product Code** and **Add On Service Code**.
3. Optionally, you can add the 3<sup>rd</sup> Party Email Address to have a copy of the documents sent to another party.
4. Click the **Save** icon, , to save your changes to this screen.
5. Once saved, click the **Place Pending Orders** button to submit the request to DocMagic.

### 3.2. Remote Document Interface Response

The **Remote Document Interface Response** screen provides specific data in response to the remote document package request. The Viewing and Printing of the stored data does not occur within UniFi PRO Mortgage, but rather the data is stored in the database for retrieval and viewing. Viewing and Printing are functions of your external programs for PDF and HTML files.

Nbr	Company	Doc. Package	Status	Date Received	Time Received	Emp Code
042	Doc_Magic	100	PENDING			dlemish
041	Doc_Magic	300	Received	07/06/2007	9:38 AM	cathy
040	Doc_Magic	200	Received	07/03/2007	4:37 PM	dlemish

Nbr	Code	Condition	Message
1	Server		Worksheet Opened
2	Server		Worksheet Processed
3	Debug		Process Response Finish : Fri Jul 06 06:39:29 P

Vendor Ref #

Message Code

Message Type

View Documents

Message

Figure 4

When a specific order is selected, the results from DocMagic's Goof-Proof Audit System are shown in tabular format below the order list. DocMagic's Goof-Proof Audit system instantly detects problems with incoming data and organizes any issues into warning and fatal error messages. When an Audit message is selected, the details will be displayed in the **Message Code**, **Message Type**, and **Message** fields.

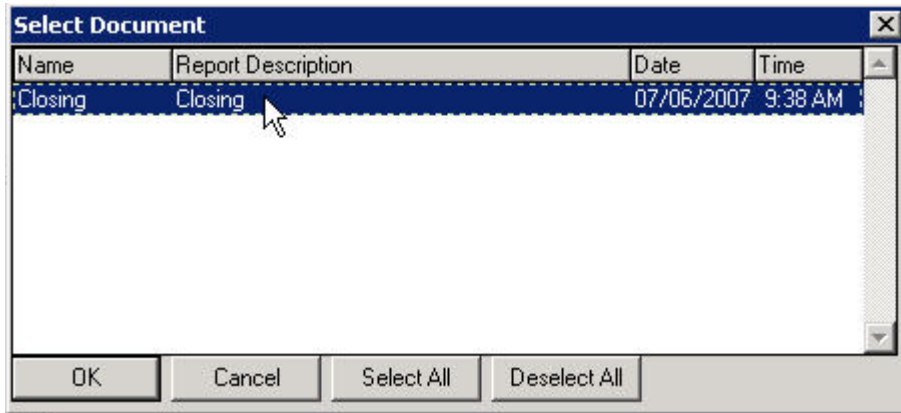
#### Warning

These errors indicate that the information entered in the reported field differs from the information DocMagic expects to see. This audit is only to tell you that DocMagic has found something in your worksheet that is not normal and will not prevent you from processing.

#### Fatal

Fatal errors stop processing until the problem is remedied. These errors **MUST** be corrected before DocMagic will allow you to continue to the document processing stage of the program. These errors indicate an item in the worksheet that is critical to successful loan document production.

If the request was processed successfully, the **View Documents** button will be enabled. When clicked, the **Select Document** dialog will be displayed.



**Figure 5**

Presently, the DocMagic documents are returned as a complete set, so the list will contain either **Predisclosure** or **Closing**. The default document format is Adobe's Portable Document Format (PDF). Select the document item and click **OK** to view the package using the external PDF Reader program.

## 4. Company Information

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Fiserv Lending Solutions  
901 International Pkwy, Suite 100  
Lake Mary, FL 32746-4711  
(800) 872-7882  
www.fiservlendingsolutions.com

### 4.1. Product Information

*“Fiserv Lending Solutions, an operating group of Fiserv, Inc., is a single-source provider of end-to-end automotive finance and real-estate lending solutions for banks, thrifts, credit unions, mortgage companies, and captive finance companies. Fiserv software, technologies and services support the full range of information processing and transactions necessary for effective life-of-loan management.*

*UniFi PRO is an enterprise loan origination system using workflow and document management, rules-based event management, automated work queues, and data verification to help you make more intelligent decisions and improve efficiency during traditional and electronic mortgage loan processing.”*