

MORvision

DocMagic Interface Guide

Version 1.0

The screenshot shows the MORvision Control application window. The title bar reads "MORvision Control". The menu bar includes "File", "Edit", "Options", "View", "Maintenance", "Utilities", and "Help". The toolbar contains icons for "New", "Open", "Find", "Filter", "Memos", "Status", "Lock", "Help", and "Exit". The main window is divided into a left sidebar with navigation options and a central data table.

Loan Shortcuts	Loan ID	Attachment	Loan	Buyer Name
Prequal	1418650840		CVCF15	JULIA A
	ANGEL		CVCF30	LEETT
	ARCHER		KHCCCF	CHAR
	1418650675		CVCF30	GARY
	1418650709		CVCF20	TOM
	1418650451		CVCF30	ALB
	0403197809		FTCF30	DIA
	1418650758		CVCF30	JUA
	1418650469		CVCF15	RICH
	1418650444		CVCF15	GLEN
	1418650907		CVCF30	BILL B
	1418650220		CVCF15	ALEX B
	070439		KHCCCF	JEREMY
	1418650600		CVCF25	TERRY B
	0403310626		FTCF30	CHENOA
	1418650139		CVCF30	ELIZABE
	1418650766		CVCF30	TRACY D
	1418650873		CVCF20	JERRY G
	1418650519		CVCF30	GWEND
	1418650436		CVCF20	RALPH
	1418650287		CVCF30	LINDA
	1418650782		CVCF30	DOY
	CREECH		CVCF30	DON
	0403394596		FTCF30	BILL
	0403250038		FL53F	ROB
Underwriting Plug...	1418650352		CVCF30	CHA
Credit Bureau Plu...	1418650386		CVCF20	TRE
	1418650501		CVCF30	ZELL



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Revision History

2007-04-12	<input type="checkbox"/> Initial Revision
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This document provides information regarding clients using Dynatek's MORVision platform.

1. Background

1.1. Interface

- ❑ Custom Plug-in to seamlessly process transactions using DocMagic Direct webservice.

1.2. Account

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

1.3. Plan Management

- ❑ Plan management is performed through either DocMagic Online or DSI's Account Administration system

2. MORVision -Accessing DocMagic Services

2.1. Creating the MORVision Plug-In for DocMagic

In MORVision,



Figure 2-1

Select **Plug-In Wizard** from the **Utilities** menu.

2.1.1. Specifying the Process Type

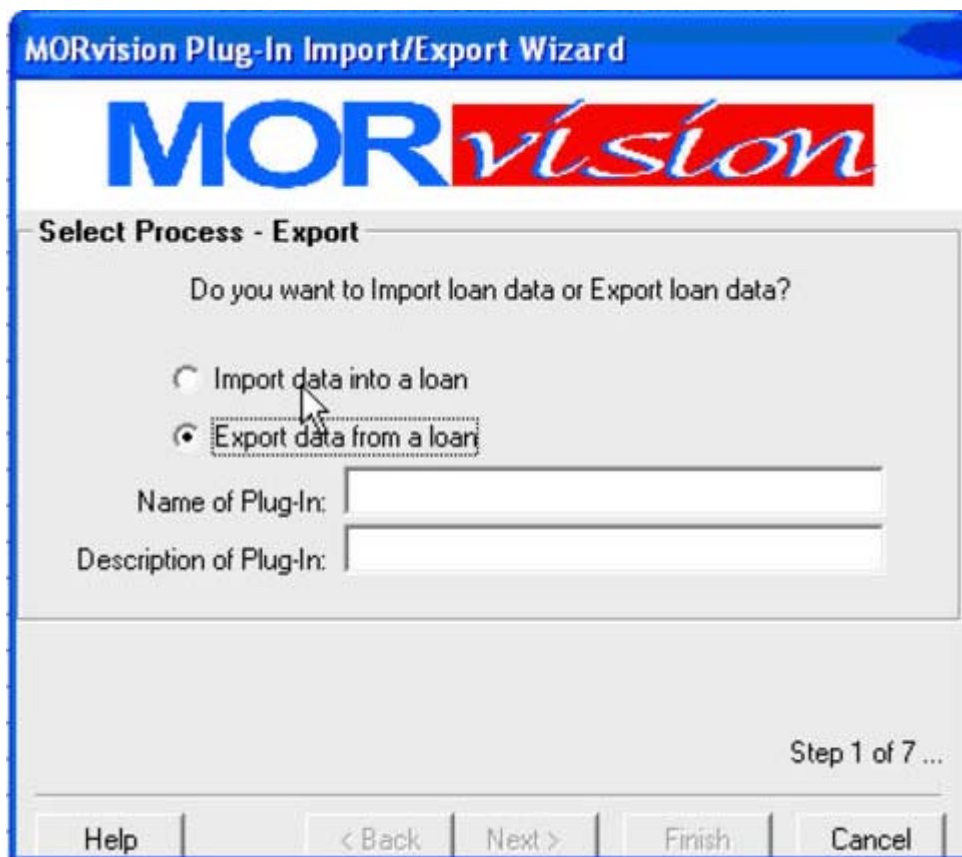


Figure 2-2

Enter a Name and Description for the Plug-In, such as DocMagic and DocMagic Interface respectively. Click **Next** to continue.

2.1.2. Specifying the Data Definition

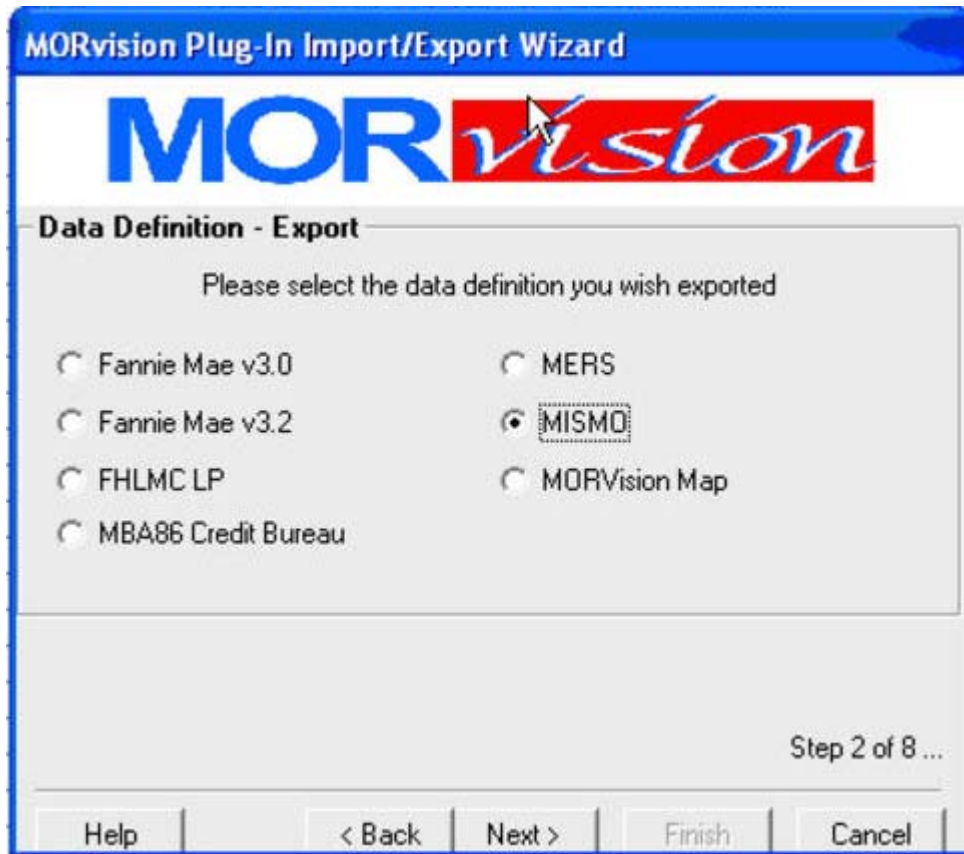


Figure 2-3

From the **Data Definition – Export** screen, choose **MISMO**.

2.1.3. Specifying the MISMO Data Set

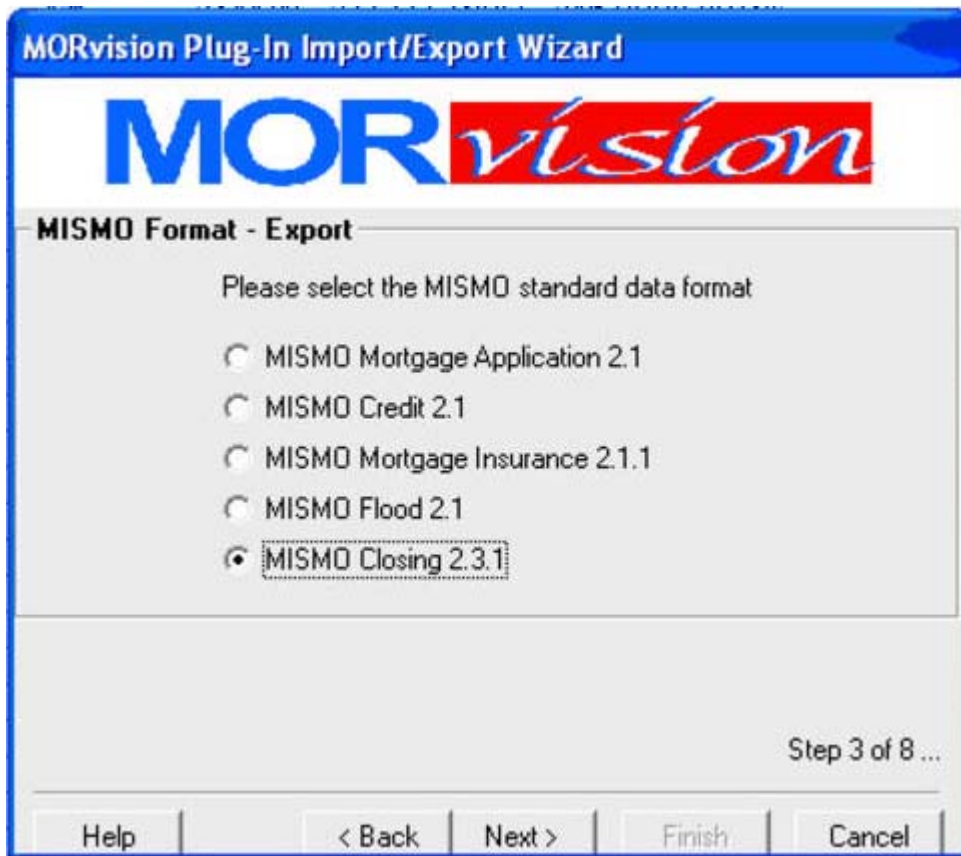


Figure 2-4

Select **MISMO Closing 2.3.1** as the standard data format to be used.

2.1.4. Specifying the Transport

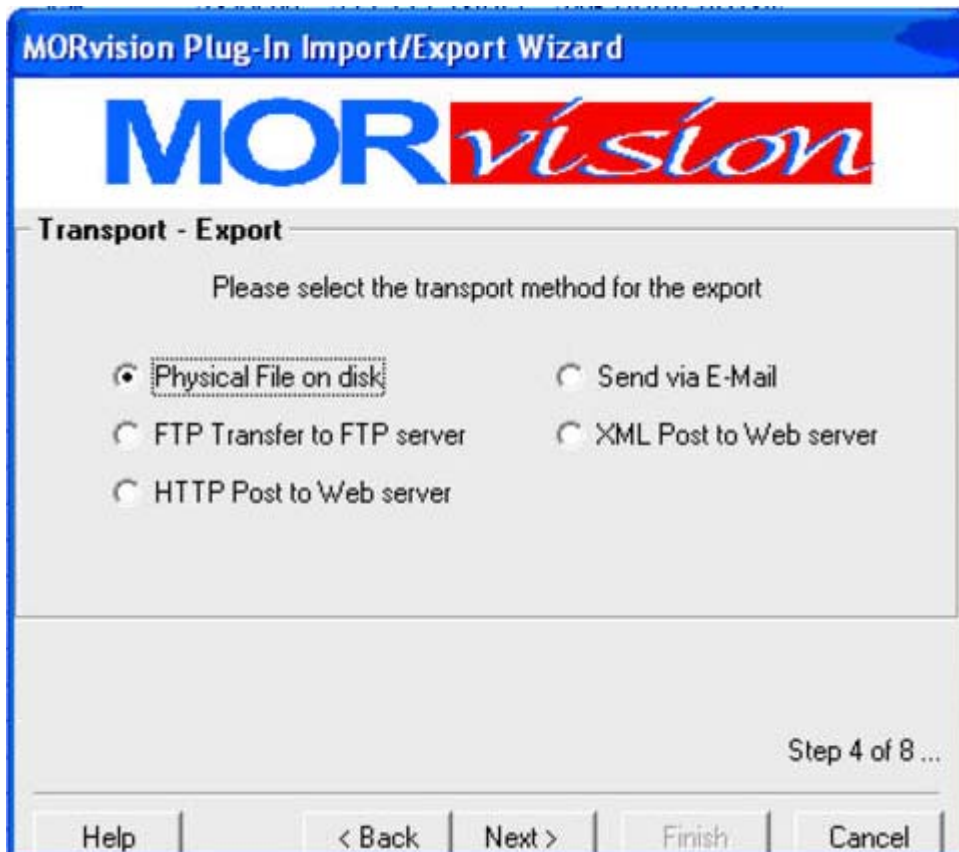


Figure 2-5

For the **Transport**, choose **Physical File on disk**. Click **Next** to continue.

2.1.5. Specifying the File Name and Location

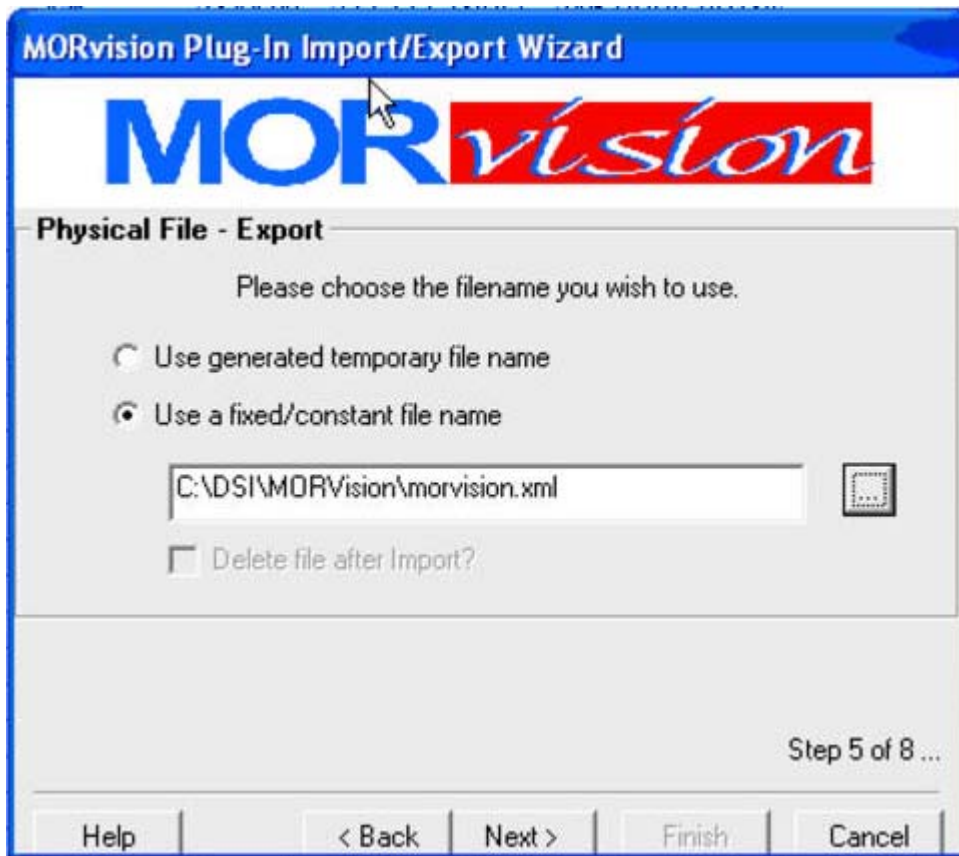


Figure 2-6

For the export to work, DocMagic requires the extension to be “.xml”. On the **Physical File** screen, set the location and filename for the export file. Select the **Use a fixed/constant file name** option. Click **Next** to continue.

2.1.6. Specifying the Program to Run



Figure 2-7

Since DocMagic Online is a web-based application, there is no program to run. Click **Next** to continue.

2.1.7. Completing the Plug-in Wizard

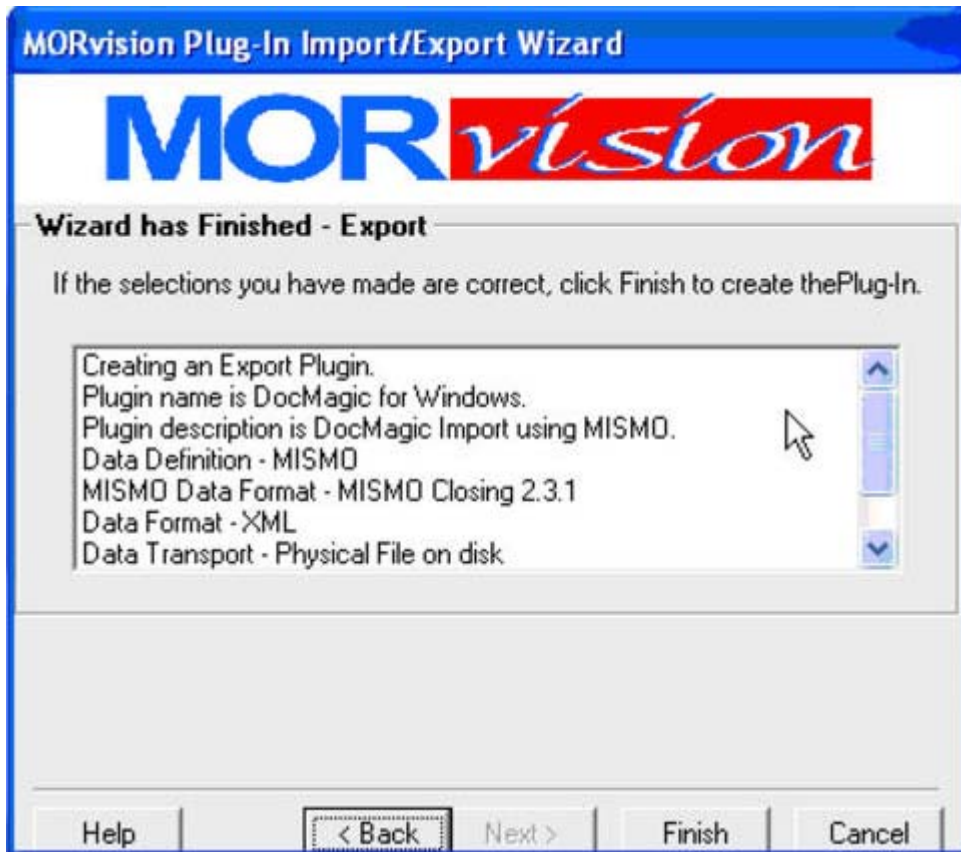


Figure 2-8

Click **Finish** to complete the Plug-in Wizard. The Plug-in will be created under the My Plug-Ins sidebar within MORVision.

Once complete, right-click on the Plug-In and select **Edit Macro Wizard**. Replace the contents of the macro with the content of the script file (DocMagicDirectWithPlanCode.sba).

2.2. Requesting DocMagic Service

To use the plug-in, right-click on the **DocMagic** icon and choose **Run Job**.

2.2.1. First Time Configuration

The first time the plug-in is run, you will be presented with the following Configuration dialog:

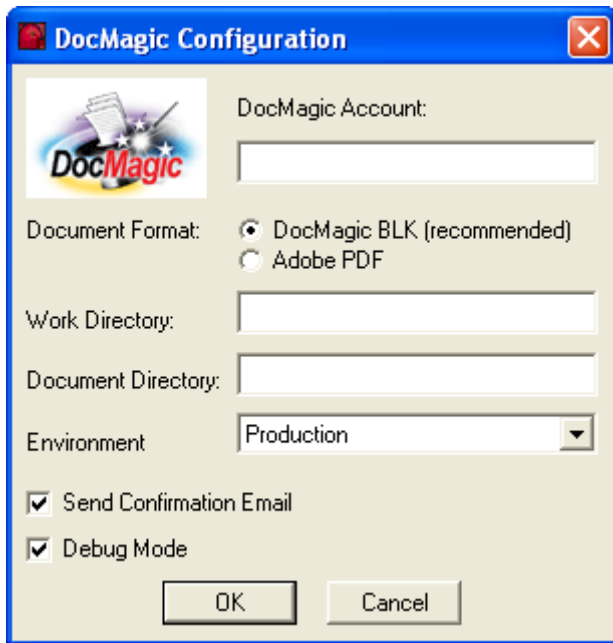


Figure 2-9

It will then prompt for the DocMagic Username and Password.

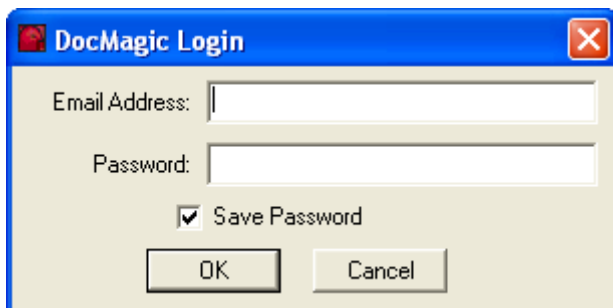


Figure 2-10

3. Submitting files to DocMagic

When the plug-in is launched, the following DocMagic Process Options dialog will appear:

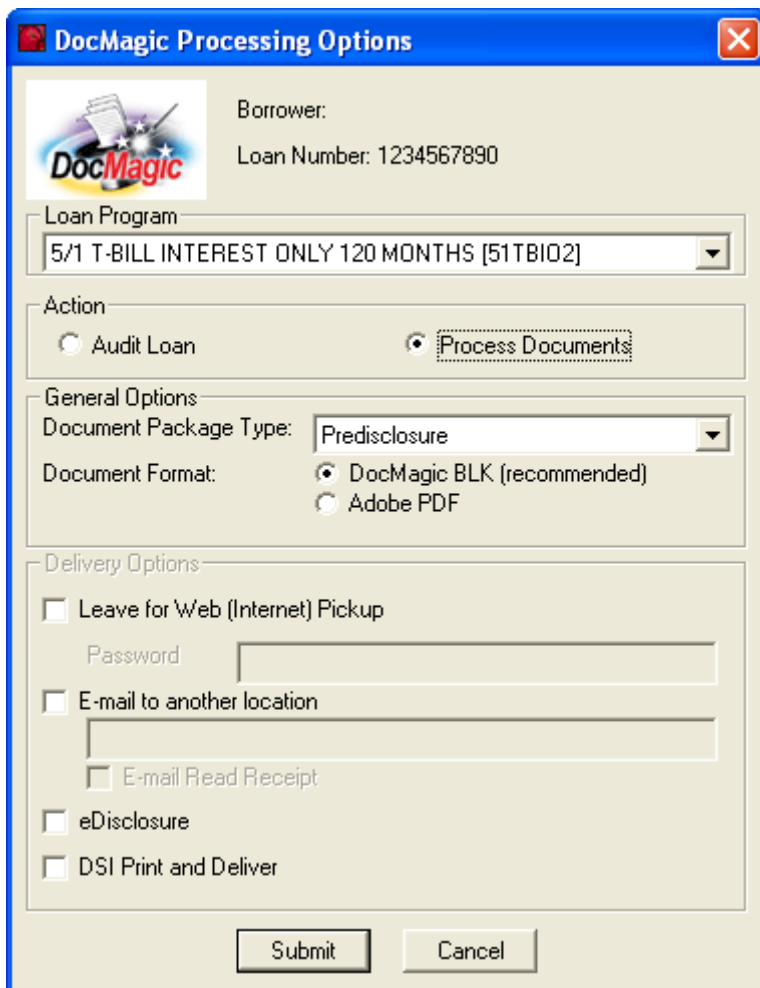


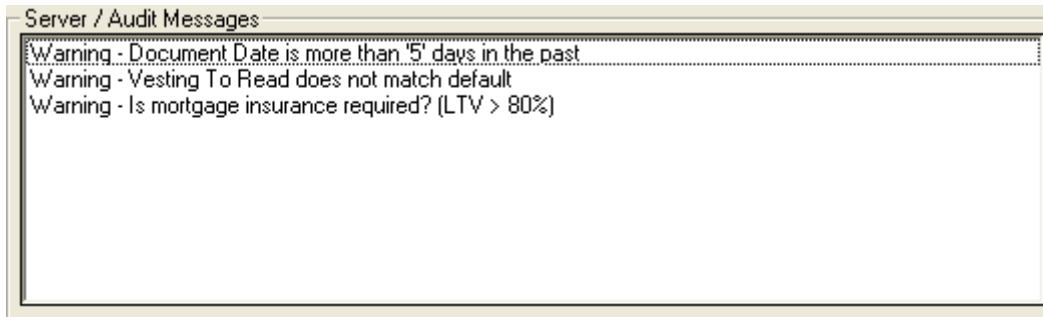
Figure 3-1

3.1. *Selecting the Loan Program*

From the drop-down box, select the appropriate Loan Program from the list. The Plan items represent all of the Loan Programs presently assigned to your DocMagic Account.

3.2. *Audit Loan Information*

DocMagic's Goof-Proof Audit system instantly analyzes all loan-specific data for accuracy. With over 500 standard data validation and loan type-specific audits and unlimited potential for custom user-defined audits, DocMagic's Goof-Proof Audit system will insure that documents have all of the necessary information. DocMagic's Goof-Proof Audit system is completely customizable. Audits can be implemented on many different levels of the process. Audits on a document level can halt the processing of an individual document and report the problem to the user while audits implemented on a package level can halt the production of the entire loan document package.



Audits should be performed until it is time to actually draw the documents. No DSI charges are incurred when audits are done, so to avoid charges for loans that don't close, a process request should only be used when the documents are needed. Audits are triggered by setting the **Action** to **Audit Loan**.

3.2.1. Audit Severity

DocMagic's Goof-Proof Audit system instantly detects problems with incoming data and organizes any issues into warning and fatal error messages.

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.

3.2.2. Additional Audit Results

When the WebSheet is audited, the following items are generated:

- APR/Payment Schedule
- Amortization Schedule
- Section 32 Computation
- State High Cost Analysis
- Fannie Mae Test
- Impound Account Analysis

3.3. *Document Processing*

Once all of the necessary data has been entered and the Audit process has been successful, it is time to process the Document Package. When a request is made (based on the package type), a set of documents are created and delivered in the requested file format. Set the request **Action** to **Process Documents**.

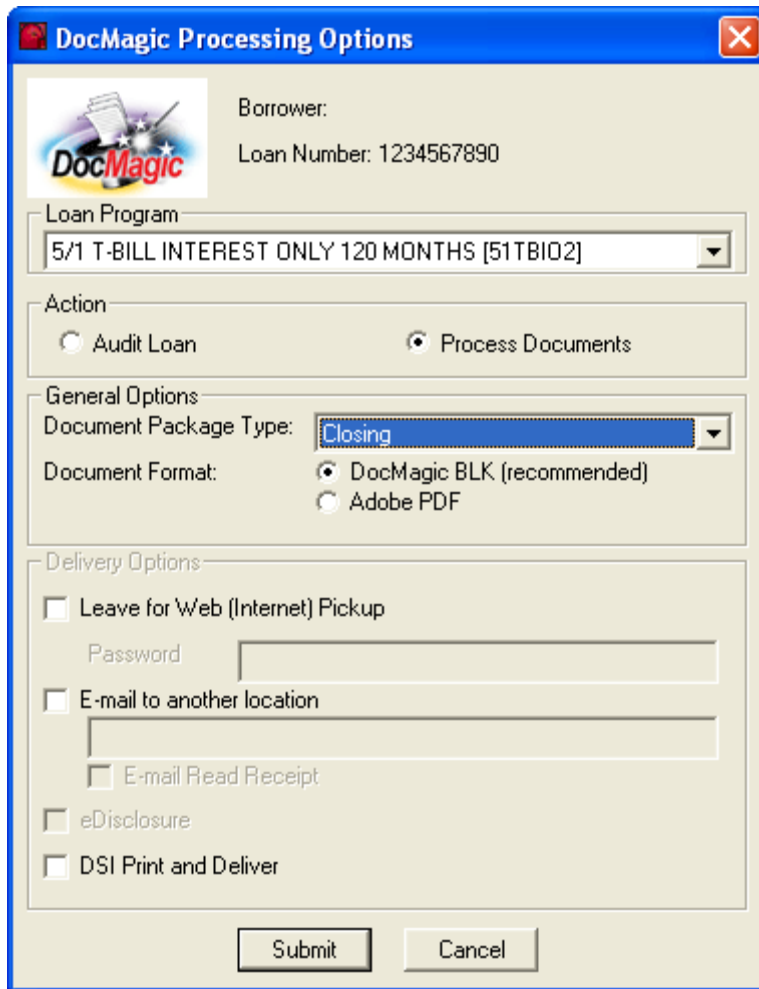


Figure 3-2

3.3.1. Document Package Type

DocMagic Online provides for the processing of 4 distinct Document Packages:

1. Loan Application
2. Closing
3. Predisclosure
4. Servicing Transfer

3.3.2. Document File Format

Two formats are available for these package types:

1. DocMagic Blockument (BLK) – Recommended
2. Adobe Portable Document Format (PDF)

3.3.3. Delivery Options

Email Service

Notifies a 3rd party via email at the time the documents are prepared. For a nominal fee, the set of documents can also be emailed to a specified email address.

DSI to Print and Deliver

Our In-house Production Department boasts the fastest turnaround time available anywhere. Documents can be produced in-house and delivered directly using the information provided. For a nominal fee, DSI can print the documents and deliver them to a person and address provided.

3.3.4. Additional Services

In addition to generating the document set, DSI offers the following services that can be added at time of process.

eDisclosure

For the “Predisclosure” package type, if one or more borrower emails are defined, the **Send Borrower eDisclosure** option becomes enabled. If checked, an email invitation will be sent to all borrower emails. This email will provide the borrower a link to DSI’s eDisclosure system to view their Predisclosure documents online.

Web Pickup

When the **Leave for Web (Internet) Pickup** option is selected, this enables a set of documents for remote retrieval and notifies a third party via email. In addition, the WebPickup provides for applying a password to the set for additional security through the Security section.

3.3.5. Processing Results

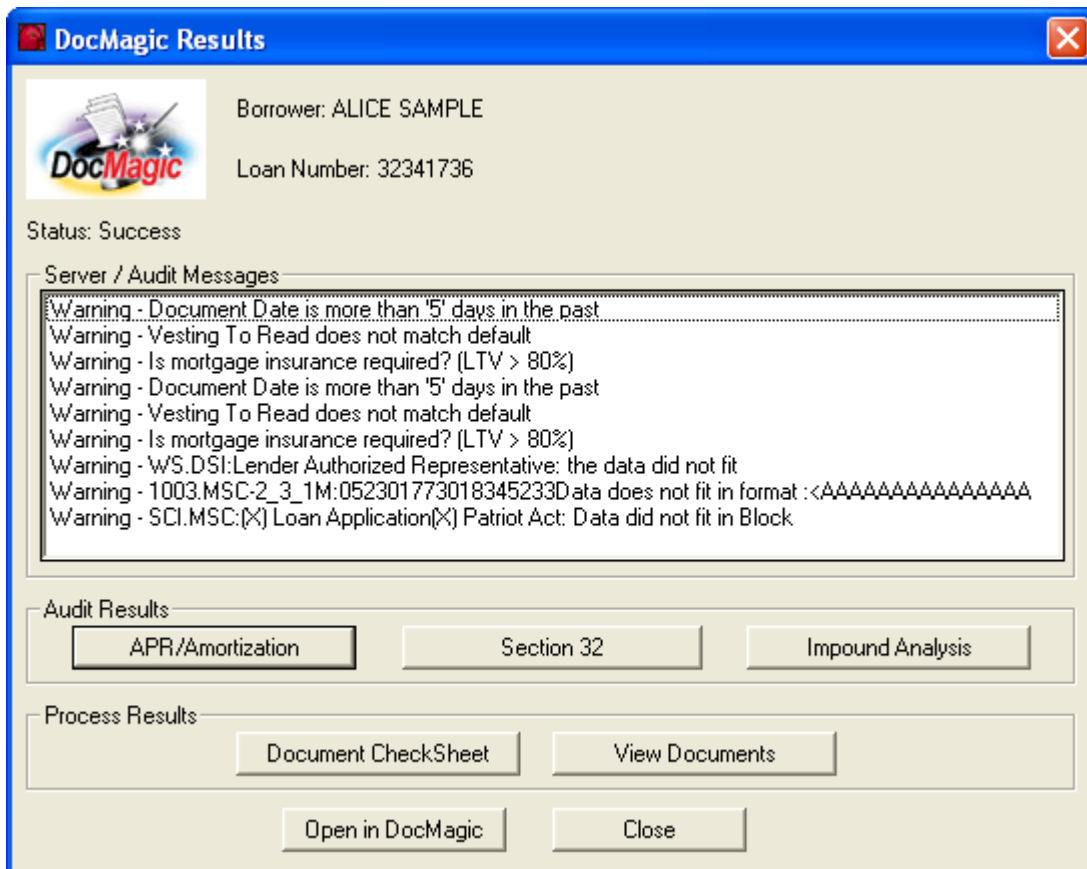


Figure 3-3

In addition to the information that is returned as part of the Audit, upon success, the **Document CheckSheet** and **View Documents** buttons will become enabled.

3.3.6. Using DocMagic Online

At anytime, the **Open in DocMagic** button can be used to open the file in DocMagic Online.

4. Company Information

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4.1. Product Information

“Dynatek’s MORvision™ technology suite is the most advanced and flexible mortgage software available. In addition to making loan processing and closing faster and more efficient, MORvision™ helps you:

- Service multiple business channels (Wholesale, Retail, HELOC, etc.) through one integrated system.*
- Streamline your processes and improve data integrity.*
- Ensure compliance amid ever-changing legislation.*
- Connect to third-party services directly from your MORvision system.*
- Support your specific needs through easy-to-use customization tools.*
- Enhance your current processes – not change them.”*