

eDoc Viewer White Paper 24.1



PRODUCT NAME

eDoc Viewer

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PRODUCT DESCRIPTION

Plugin to automatically call a document in a separate (non-efolder) window for review, from a button on any custom form and/or via a business rule.

Quickly access an eFolder document from a custom input form button or drop-down menu without having to navigate through the eFolder itself. Additionally, the document window can stay up even when the eFolder and the loan itself are closed out. Quickly build custom lists of conditions and documents in a separate window and add them all at once with a single click of a button. Quickly search conditions and eFolder documents while adding them via the native dropdown as opposed to tirelessly scrolling to find the document/condition needed.

Product Version:	24.1
LOS System(s):	Encompass Banker
Product Components:	KM.eDocViewer_v24.1.x, API, Custom Fields
Requirements:	Set custom fields to use within Business Rules
Dependencies:	<u>See Addendum</u>

HOW-TO

The eDoc viewer comes with a custom form from KensieMae that provides quick access to demonstrate how this tool can be used on a custom input form. Both technologies are demonstrated here. The older technology shows a reference to a quick PDF viewer. The new technology launches the entry as if the eFolder bucket had been opened in the eFolder.

* eDoc Viewer *



eFolder Doc Viewer

Select a document placeholder in the eFolder to view the attachments

Document Bucket (Doc with attachments only will be shown)

1

▼

Do not display empty docs [CX.KM.IGNOREEMPTYDOCS]

2

Yes

▼

Bulk Add Docs [CX.KM.EFOLDERDOCADD]

3

Bulk Add Conditions [CX.KM.EFOLDERCONDADD]

4

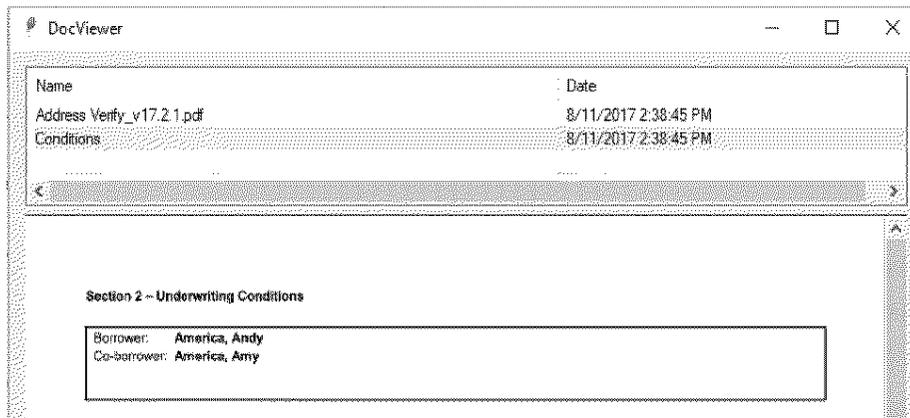
Needed Plugin: KM.eDocViewer



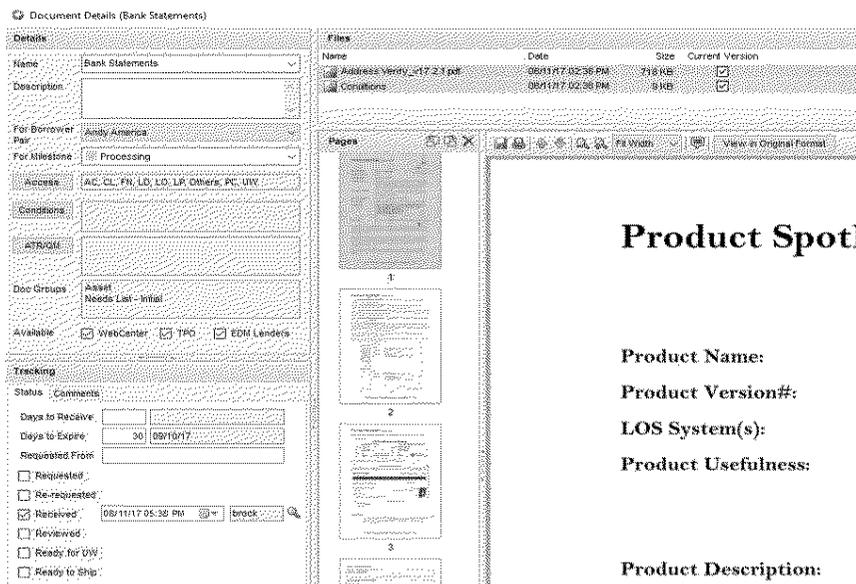


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1. Select a document and click View Old or View New
 - a. **View Old** will set field CX.VIEWDOCBUCKET which is the legacy approach and will open up the attachments found inside the selected or set eFolder document. The window uses adobe to render the attachments and will show all applicable attachments in one screen.



- b. **View New** Old will set field CX.KM.VIEWEFOLDERDOC which is the new approach of viewing attachments with this tool. This will open up the native eFolder document details window for any specified eFolder document that has current version attachments.



2. **CX.KM.IGNOREEMPTYDOCS** – When set to Y, it will suppress doc buckets that get called. When set to N or Empty, it will display the empty doc bucket when called.
3. **CX.KM.EFOLDERDOCADD** – Any change to this field will pull up the non-modal window in which a user can build a list of documents to add in bulk while working on the loan file.
4. **CX.KM.EFOLDERCONDADD** – Any change to this field will pull up the non-modal window in which a user can build a list of conditions to add in bulk while working on the loan file.





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Document and Condition Search

When adding a new document or condition, the details screen will now contain a magnifying glass to the right of the document name.

Users can use this to search the list of documents using a "contains" search instead of a "starts with".

Name	Description	Type
Appraisal		Settlement Service
Property: Appraisal		Needed

FAQ

- Below is an example of how each of the different methods, for viewing documents, could be used on a custom input form. *Note: As a best practice to clear the field you are trying to trigger it is included in the below example.

```

VB code for Button1's Click event
Find Edit Insert

Button1 Click
'Legacy Approach
Macro.SetField("CX.VIEWDOCBUCKET", "")
Macro.SetField("CX.VIEWDOCBUCKET", "Underwriting")

'eFolder Document Details Window
Macro.SetField("CX.KM.VIEWFOLDERDOC", "")
Macro.SetField("CX.KM.VIEWFOLDERDOC", "Underwriting")

```

- The Doc Viewer can be moved off-screen, have multiple window sessions open at once, and will remain open even if the loan is closed out. (This only applies to Legacy tech)
- The tool can be triggered to add an eFolder document to the eFolder if the document has yet to be added. To do this set CX.KM.VIEWFOLDERDOC field with the name of a valid eFolder document (must exist in settings) then a ~ followed by 'true'. Example "<ValideFolderDocument>~true"
- Launch the eDoc viewer from a field trigger rule with the below code.





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Legacy Technology:

Add/Edit Field Event

Activation

Activation Type: Field value modified

Trigger Field ID: 300

Description: Trans Details Credit Rpt Ref #

Criterion: Any change in field value

Action

Action Type: Run advanced code

Advanced Code:

```
ignoreValidationErrors
[CX.VIEWDOCBUCKET] = ""
[CX.VIEWDOCBUCKET] = "Credit Report"
```

New Technology:

Add/Edit Field Event

Activation

Activation Type: Field value modified

Trigger Field ID: 300

Description: Trans Details Credit Rpt Ref #

Criterion: Any change in field value

Action

Action Type: Run advanced code

Advanced Code:

```
ignoreValidationErrors
[CX.KM.VIEWFOLDERDOC] = ""
[CX.KM.VIEWFOLDERDOC] = "Credit Report"
```

(The first line's purpose is to clear out the field value to avoid override conflicts)





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ADDENDUM

Dependencies

- KM.PluginData.dll
- KM.PluginLauncher.dll
- MstHtmlEditor.dll
- KM.UserSetting
- API
- CustomFields:
 - CX.VIEWDOCBUCKET
 - CX.KM.EFOLDERDOCADD
 - CX.KM.IGNOREEMPTYDOCS
 - CX.KM.VIEWEFOLDERDOC
 - CX.KM.EFOLDERCONDADD

