



April 2019 Release Notes

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Capsilon IQ Platform & DV Desktop

Automated Document Recognition

Q2 2019 Standard Origination ADR Learnset 4.4.3.0

This release provides a new Q2 2019 Standard Origination ADR Learnset 4.4.3.0.

Release Highlights

- Added new documents to the learnset.
- Improved recognition accuracy.
- Resolved support cases (see the list of resolved issues [below](#))

New and Improved Capabilities

Scope

This document provides an overview of the changes to Capsilon's Automated Document Recognition (hereafter referred to as "ADR") by the Q2 2019 Standard Origination ADR Learnset version 4.4.3.0 (hereafter referred to as "Learnset").

The Q2 2019 Standard Origination ADR Learnset version 4.4.3.0 learnset is built on the top of Q1 2019 Standard Origination ADR Learnset version 4.4.2.0.

Enhancements in the Learnset

The Learnset contains [328 document types](#), which includes 12 document types for integration with partners/ Capsilon applications and one "Recycle Bin" document type, which are not supported for ADR.

Support for document hint for the state specific document types.

New Variations of State Specific Documents Added to the Learnset

1. CA Bureau of Real Estate Disclosure
2. CA Machine Copies Notice
3. CA Department Of Real Estate Disclosure

Improved Accuracy

Accuracy was improved for the following documents:

1. Paystub
2. First Payment Letter

Other Notes

1. Spanish language versions of the Closing Disclosure, Loan Application, Loan Estimate and SSA Form 89 are not supported for Automated Document Extraction.
2. The learnset is expected to recognize only the specific Spanish document variations that are learned by Capsilon. Additional versions that may be identified during customer validation in production will be considered in a subsequent release.
3. If a Spanish document has a barcode, then the barcode encoded value is expected to be in English.
4. The default auto tagging feature is not supported for Spanish language versions of the documents.
5. Splitting of consecutive document sets based on file boundary and default auto splitting feature will be supported for the Spanish language versions in this learnset.
6. Splitting of consecutive document sets based on file boundary and default auto splitting feature is continued to be supported in this learnset. This default auto splitting feature is not available for the following documents, and consecutive sets of these documents will be merged:
 - a. Bank Statement
 - b. CFPB Home Loan Toolkit
 - c. CHARMS
 - d. Credit Report
 - e. FACTA Credit Score Disclosure
 - f. Preliminary Title Commitment
 - g. Purchase Agreement
 - h. Settlement Cost Booklet
 - i. Tax Returns

Note: Splitting of consecutive document sets based on file boundary takes precedence over this merging behaviour.

7. Spanish documents like CHARMS contain pages from the Loan Estimate and Closing Disclosure. These pages may get recognized as Loan Estimate or Closing Disclosure respectively. This will be resolved in a subsequent release.
8. The learnset continues to support document section names for the Tax Returns, Security Instrument Rider and IRS 1099 so that the user does not need to add section names manually.
9. Existing customers should consider the changes between this learnset and their existing learnset and update their stacking orders accordingly.

Compatibility

- This learnset is compatible with ADR build 10.5.0.0 onwards.
- In order to support the document section name, ADR build 10.5.0.0 and onwards is required.
- This learnset should not be used with ADR build 9.x and previous ADR builds.
- For the applicant association feature, use platform version 18.4.0.0 onwards..

Configuration

#	Component	Version
1	Standard Origination ADR Learnset	4.4.3.0

Q2 2019 Standard Origination ADR Learnset 4.4.3.1

This release introduces Standard Origination ADR Learnset 4.4.3.1.

Release Highlights

- This learnset is built for customers that do not want the default auto-tagging and section name features.

New and Improved Capabilities

Scope

This document provides an overview of the changes to Capsilon's Automated Document Recognition (hereafter referred to as "ADR") by the Q2 2019 Standard Origination ADR Learnset version 4.4.3.1 (hereafter referred to as "Learnset").

The Q2 2019 Standard Origination ADR Learnset version 4.4.3.1 learnset is built on the top of Q2 2019 Standard Origination ADR Learnset version 4.4.3.0. This learnset does not support default auto-tagging and document section name features in ADR.

The Learnset contains 328 document types, which includes 12 document types for integration with partners/ Capsilon applications and one "Recycle Bin" document type, which are not supported for ADR.

The purpose of this release is to disable the default auto-tagging and document section name features support which was enabled in Q2 2019 Standard Origination ADR Learnset version 4.4.3.0. There are no other changes in the learnset.

Other Notes

Existing customers should consider the changes between this learnset and their existing learnset and update their stacking orders accordingly.

Compatibility

- This learnset is compatible with ADR build 10.5.0.0 onwards.
- In order to support the document section name, ADR build 10.5.0.0 and onwards is required.
- This learnset should not be used with ADR build 9.x and previous ADR builds.
- For the applicant association feature, use platform version 18.4.0.0 onwards.

Configuration

#	Component	Version
1	Standard Origination ADR Learnset	4.4.3.1

Automated Document Recognition (ADR)

Release Highlights

- ADR service is enhanced to ensure that mail items do not get bypassed without indexing/classification.
- Resolved support cases (see the list of resolved issues [below](#))

Compatibility

- DocVelocity 10.0 onwards
- Bulk Scan & MailItem Flow - DocVelocity 18.2 onwards
- Auto-tagging - DocVelocity 10.3.2.0 onwards
- BARCODE_ONLY mode - BDS - 1.2.4.0 onwards
- Multi-template support in ADR - DocVelocity 18.3.0 onwards
- Standard Origination ADR Learnset 4.0.0.0 onwards
- Standard Origination and Servicing ADR Learnset 2.0.0.0 onwards
- Standard Reverse Mortgage Learnset 2.0.0.0 onwards
- Section Names
 - Standard Origination ADR Learnset 4.3.0.0 and onwards
 - DocVelocity 18.3.0.0 onwards

Component Dependencies:

This build should be deployed with Standard Origination ADR Learnset 4.1.0.0 onwards or Standard Origination and Servicing ADR Learnset 2.0.0.0 onwards or Standard Reverse Mortgage Learnset 2.0.0.0 onwards.

Configuration

#	Component	Version
1	ADR	10.5.5.0

Automated Data Extraction

Release Highlights

- Improved extraction of Borrower/Co-borrower signature fields.
- Fixed bugs identified on payloads. See the list of resolved issues [below](#)

Compatibility

- DocVelocity 10.0 and above.
- The feature of using tag information during extraction is supported on DV version 10.3.7.0 onwards.
- Standard ADE Learnset 1.5.0.0 and above. (On learnsets older than Standard ADE Learnset 2.2.0.0, snippet and value extraction accuracy may degrade.)

Configuration

#	Component	Version
1	ADE	5.1.1.0

Annotation Placeholder Detection (APD)

This release introduces introduces the Annotation Placeholder Detection service.

Release Highlights

The APD service will be used for the following:

- Detect blank spots on pages for annotation of barcodes.
- Add information related to barcodes and pages to the Page Barcode Registry (MySQL DB).

Compatibility

- DocVelocity 19.4.2.0 onwards.

Configuration

#	Component	Version
1	APD	1.0.1.0

Document Management

Desktop

Release Highlights

This release introduces:

- Updated system requirements.
- Changed context menu behavior when multiple documents are selected.
- Changed the maximum length of the "Specific Documents" field in the Batch Delivery Template.
- Added the option "Get all pages automatically in Sort Mode" to desktop cache settings.
- Made stacking order filtering configurable.
- "File These Documents" check box is not available for users without File/Sort privilege.
- Fixed multiple issues related to PDF library.
- Resolved support cases (see the list of resolved issues [below](#))

New and Improved Capabilities

Updated System Requirements

The requirements for machines that can run Desktop are updated as follows:

- Memory: 6 GB of RAM minimum (8 GB RAM preferred)
- Processor: Quad-Core i5 processor 3.5Ghz or faster
- Storage: at least 3 GB of free space for documents caching

Changed Context Menu Behavior for Multiple Document Selection

The context menu did not work properly, when users selected documents from multiple groups and tried to perform various actions via the context menu. To resolve these issues, rules for context menu actions behavior for multiple document selection have been changed in view and sort mode.

The actions listed below are enabled if at least one of the selected documents accepts these actions. However, the context menu actions do not apply to all selected documents, but only to those for which they are allowed.

- "Open/Print PDF"
- "Save Document(s) as PDF..."
- "Save Source Document(s)..."
- "Export Data Points..."
- "Merge"
- "Cut"
- "Recycle Selection"
- "Delete Permanently"

Extended the "Specific Documents" field in the Batch Delivery Template

A stacking order with about 1500 items was truncated in the "Specific Documents" field in the batch delivery template. To fix this issue, the maximum length of the "Specific Documents" field in the batch delivery template was extended to include 100000 characters.

New Cache Option "Get all pages automatically in Sort Mode"

The option "Get all pages automatically in Sort Mode" is added to desktop cache settings to address the issue with slowness when Sort Mode was opened in folders with a large amount of documents.

This option allows users to switch on/off automatic download of all pages in sort mode. The new check box is not available in cache settings during installation, it can only be used when Desktop is installed.

Cache Settings

Get all pages automatically in Sort Mode

Use page caching

Maximum Cache Size (Hard Disk) (500 .. 10000) 2000 MB

Page cache will be located on drive C: (13496 MB is free)

Clear cache when quitting Desktop

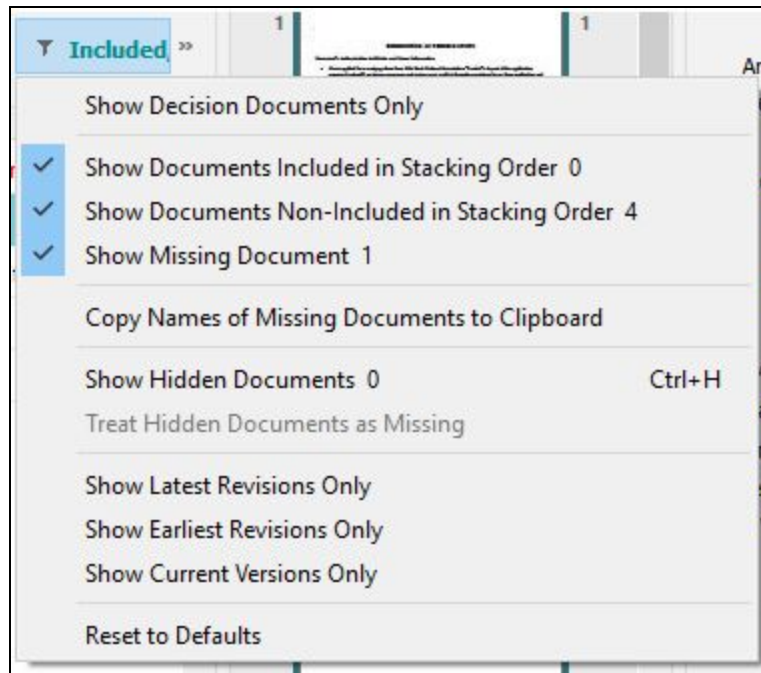
Note: When Maximum Cache Size is reached, oldest items will be removed first.

OK Cancel

Configurable filter "Show Documents Included in Stacking Order"

The filter "Show Documents Included in Stacking Order" is made configurable by adding a site preference "alwaysShowOnlyDocsIncludedInSO" that can be enabled or disabled in site subscription settings.

- If the new site preference is enabled for a site, the "Show Documents Included in Stacking Order" filter will be turned on by default when a stacking order is selected. If the user changes filters and then closes the folder, filter settings will be reset to default.
- If the site preference is disabled, filters will work as they did before 19.1.2: by default all stacking order options will be checked. If the user changes filters and closes the folder, their filtering preferences will be remembered.



“File These Documents” Option Depends on File/Sort Privilege

Users without the Sort/File mail item privilege will not be able to see the “File These Documents” check box in the Upload screen.

Note: The “File These Documents” checkbox is still available in the thread interface for users with the View privilege only.

Fixed Technical Issues Related to PDF Library

Fixed multiple issues (crashes, data lost) during upload, sorting and export of the documents that were caused by issues in PDFium (PDF library) by upgrading PDFium library, using new PDFium API and refactoring existing code.

Compatibility

Desktop is compatible with Cloud Services 19.4.2.0.

Configuration

#	Component	Version
1	Desktop	19.4.2.13

IQ Apps

Received Mail App

Release Highlights

- The release introduces the Received Mail App that allows viewing received mail items and related documents.
- The new app is integrated into the IQ Web¹ as a tab of a selected folder.

New and Improved Capabilities

The Received Mail App allows site users to perform the following:

- View the list of documents inside a mail item (MI).
- Open selected documents.
- Search for MI by various criteria.
- Search for documents inside the MI
- Show additional MI details.
- Upload documents

The screenshot shows the IQ Web interface. On the left is a blue sidebar with the IQ Web logo and navigation options: Filed Docs, Received Mail (selected), Borrower Thread (Lo...), Closing, and Audit. The main area is titled 'Received Mail' and shows a list of 12 mail items. The top item is 'No Subject' from 'FX170753@allsubscriptionsloan.acceptan...' dated Jan 4, 2019, with '1 Doc, 5 Pgs'. Below it is another 'No Subject' item from 'John Doe, John' dated Dec 15, 2017, with '1 Doc, 4 Pgs'. A third item is partially visible. The right pane shows a document viewer for a 'Loan Application' (Pages 5) with 'Page 1 of 5' displayed. The top of the interface shows account information: FX170636 • 1611060778 • John Borrower • \$80,000.00 | Received Mail, and workspace settings: General Workspace, easyLoans, and JD.

¹ Browser application that allows site users to access and work with loan folders and documents, queues, inboxes, and so on.

Compatibility

- This update must be deployed on top of platform version 19.4.1.x.

Configuration

#	Component	Version
1	Received Mail App	19.4.2.1

Signing Request App

Release Highlights

The Signing Request App is integrated into the IQ Web as a “Signing Table” and provides the ability to download a signing request package and a single document.

New and Improved Capabilities

The Signing Request App can be used for the following:

- Download a barcoded closing package using the Signing Request App.
- Download a barcoded individual document from the closing package.
- Attach a signed document to its corresponding source in the signing request.
- Display the status of uploaded documents
- Filter documents based on package type and received date.

Compatibility

- This update must be deployed on top of platform version 19.4.2.x.

Configuration

#	Component	Version
1	Signing Request App	19.4.2.24

Document Submission Widget

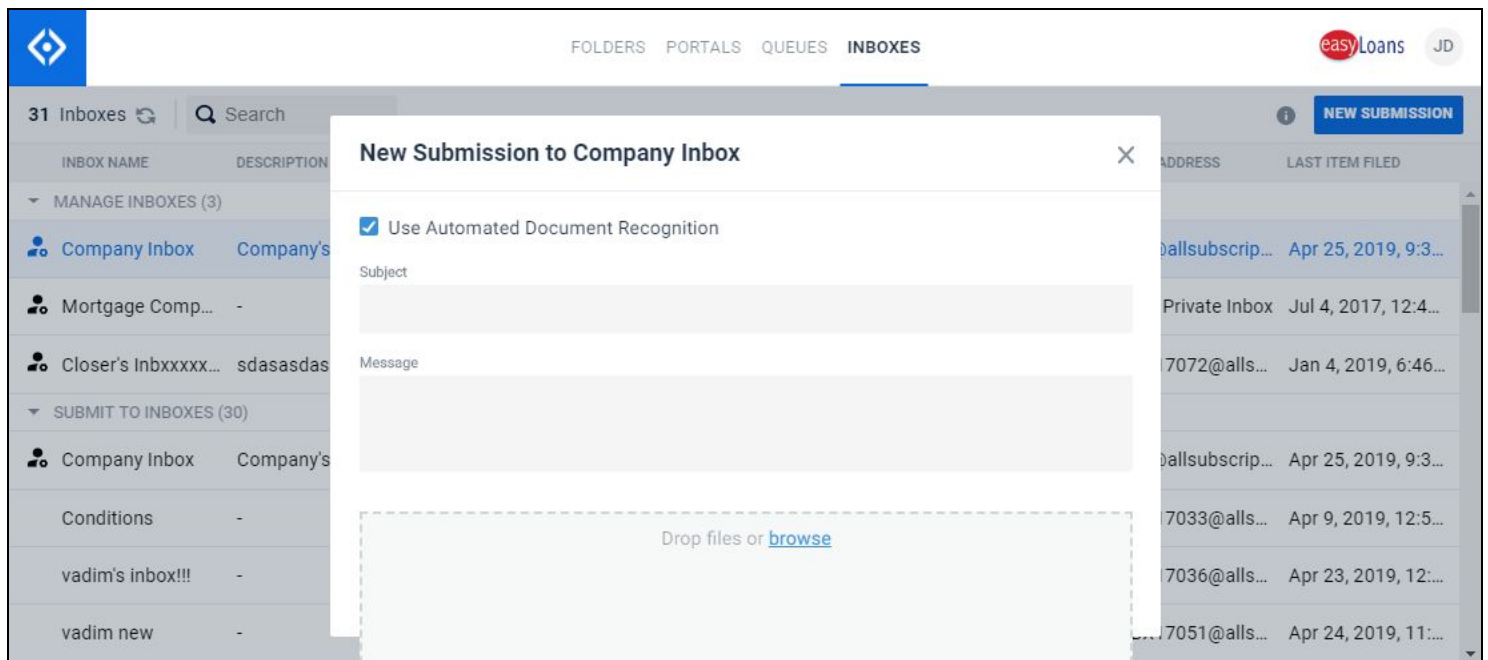
Release Highlights

- The Document Submission Widget now allows users to submit documents to inboxes in the IQ Web.
- Provided the ability to show/hide the File Documents option in the submission widget via configuration.

New and Improved Capabilities

Submit to Inboxes

- In the Inbox tab, users can see all inboxes where documents that allow submissions and inboxes where the user is a manager.
- To upload documents to an inbox, users need to select that inbox in the list and click “New Submission”.
- This button is only available if the user is an inbox manager of the selected inbox.
- Clicking the “New Submission” button opens the upload window where documents can be added by browsing or dragging.



Show/Hide “File Documents” Option

The "showFileDocuments" parameter is added to the integration script of the Document Submission Widget to show/hide the following the 'File documents' check box in the Upload Documents window.

Compatibility

- This update must be deployed on top of platform version 19.4.1.x.

Configuration

#	Component	Version
1	Document Submission Widget	19.4.2.1

Document Reader App

Release Highlights

Provided the ability to retrieve a new version of the Document Reader from the server.

New and Improved Capabilities

A new mechanism is implemented to resolve cache problems:

- When a new version the Document Reader is deployed, all changed files will be retrieved from the server.
- When the Document Reader is not updated, it will be retrieved from cache.

Compatibility

- This update must be deployed on top of platform version 19.4.2.x.

Configuration

#	Component	Version
1	Document Reader	19.4.2.7

Integration Services

LOS Integration

Release Highlights

As part of Bluesage and IQ integration, this release introduces the following changes:

- Processing of DocuTech documents.
- Support for unlinking the document from BSS if the document moves out of the filter list in IQ.
- Removed PII information from the dashboard and logs.

New and Improved Capabilities

Processing of DocuTech Documents.

DocuTech packages uploaded via BSS are ingested, processed, automatically routed, and named in their respective IQ loan folder.

Unlinking a Filtered Document from BSS

When a document which is part of the filtered document list is renamed to a document type which is not part of the filtered document list, then the document will be unlinked from BSS. No updates (content and properties) will be propagated to BSS for that document.

Compatibility

LIS 19.4.2.0 must be deployed along with:

- Cloud Services 19.4.2.0.

Configuration

#	Component	Version
1	LIS Service	19.4.2.0

Data Management

Release Highlights

- Supported applicant related fields association with respective collaborators for FNM 3.2 sources.
- Supported additional items in Income Type enumeration along with additional income patterns.

New and Improved Capabilities

Data Management Core

- DataPointDefinition (CMDD):
 - Introduced an additional attribute "participantAssociation" for data point association with collaborators. This attribute is added to all the data fields that need to be associated with a collaborator.
 - Introduced 'PaidTimeOff' enumeration option for the 'IncomeType' field.

Note: There are no new fields supported in CMDD. As in the previous release, CMDD supports a total of 1108 fields.
- Ingestion Configurations²:
 - Updated FNM 3.2 ingestion configuration for all the applicant related data fields with new attributes introduced for data point association with collaborator.
 - Enhanced ADE Ingestion Transformation rule to support an additional income type and income type patterns.

Note: There are no new fields supported for ingestion. As in the previous release, ingestion supports total 1352 fields from ADE and FNM 3.2 sources.

Compatibility

This update should be deployed on top of 19.4.1.x.

Component Dependencies:

- MDM Configurations must be deployed on top of data management components released with v. 19.4.1.x.

Configuration

#	Component	Version
1	CMDD Configuration	19.4.2.0
2	Ingestion Configurations	19.4.2.0

² *Ingestion Configurations* are the actual data extraction configurations. CMDD is referred to create these configurations in terms of data fields naming conventions, data types, and data structure.

Platform Management

Release Highlights



- Admin log enhancements
- Granular privileges for queues
- Performance improvements in the barcodes tab
- Performance improvements in the document dictionary
- Added count to each tab of the site admin and fixed count issues
- Resolved support cases (see the list of resolved issues [below](#))

New and Improved Capabilities

Admin Log Enhancements

The admin log is improved to show the following changes:

- Create and delete barcodes
- Create and delete document dictionary entries
- Create and delete conditions
- Create and delete workflows
- Create and delete roles
- Create and delete partners
- Create and delete partner users
- Create and delete data in the guest portal
- Create and delete data in the address book
- Create and delete workspaces
- Create queues
- Create and delete inboxes

5 Changes Made  View By: YESTERDAY 		
ID	ITEM TYPE	IMPORTANT INFORMATION
LOG19042383	Inbox Added	Inbox Name: Company Inbox
LOG19042384	Inbox Added	Inbox Name: Company Inbox
LOG19042385	Inbox Added	Inbox Name: Company Inbox
LOG19042386	Inbox Added	Inbox Name: Company Inbox
LOG19042387	Inbox Added	Inbox Name: Company Inbox

Granular Privileges for Queues

Provided granular privileges allowing users to edit queues.

Barcodes Performance Improvements

- Added a search for barcode document types by document code and document type description.
- Added a search for barcode templates.
- Improved the edit barcode document type UI so that the UI opens quickly for a large number of document types.

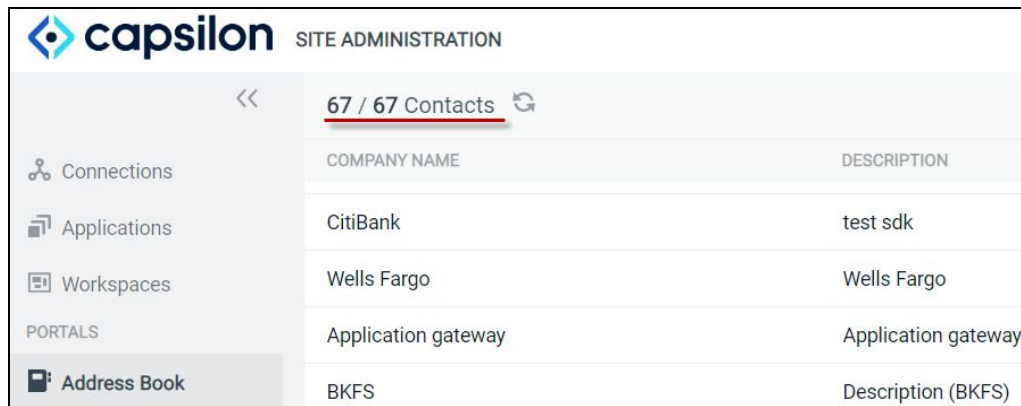
Document Dictionary Performances Improvements

Made changes to ensure that document dictionary list pages are loaded quickly:

- Added caching to the UI document dictionary service that will return objects from cache when the cache is valid.
- Updated the existing document dictionary API to provide cache timestamp that will be used for UI site caching and validating cache.
- Updated document dictionary list page to use UI side caching implemented in the service.
- Updated new/edit roles dialog to use document dictionary caching.
- Updated stacking order to use document dictionary caching.
- Update barcode document type mapping to use document dictionary caching.

Count Improvements

- Added offices and cabinets total count.
- Added inbox total count.
- Added queue total count.
- Fixed some important issues with incorrectly displayed total and currently loaded count of stacking orders, address book, and site users.



The screenshot shows the Capsilon Site Administration interface. On the left is a navigation menu with options: Connections, Applications, Workspaces, PORTALS, and Address Book (which is selected). The main content area shows a breadcrumb path: << 67 / 67 Contacts. Below this is a table with two columns: COMPANY NAME and DESCRIPTION. The table contains the following rows:

COMPANY NAME	DESCRIPTION
CitiBank	test sdk
Wells Fargo	Wells Fargo
Application gateway	Application gateway
BKFS	Description (BKFS)

Compatibility

- This update is compatible with Cloud Services 19.4.2.0.

Configuration

#	Component	Version
1	Site Admin	19.4.2.0

Customer Health

Resolved Issues

Zendesk ID	Description	Area
Ticket #30950 Ticket #30970	Added the "CA Department of Real Estate Disclosure" to the ADR learnset.	ADR Standard Origination and Servicing Learnset 4.4.3.0
Ticket #30944 Ticket #30973	Added the "A Machine Copies Notice" to the ADR learnset.	ADR Standard Origination and Servicing Learnset 4.4.3.0
Ticket #31052 Ticket #31067	Added the Ellie Mae disclosure "CA Housing Discrimination" to the ADR learnset.	ADR Standard Origination and Servicing Learnset 4.4.3.0
Ticket #33008	Improved accuracy for the "First Payment Letter" that was indexed as unknown.	ADR Standard Origination and Servicing Learnset 4.4.3.0
Ticket #34244	Some work items were marked 'Bypass' instead of going to ADR.	ADR Build
Ticket #31359	Fixed ADE auto-validation errors for Security Instrument document - Borrower Signature Indicator.	ADE
Ticket #33534	Fixed bugs identified on payloads where generation of ADE work items failed for some loans and the DV log recorded errors: <ul style="list-style-type: none"> Failed in execution of Data Extraction Session Application error in extraction of data Failed in execution of Data Extraction Session Failed in execution of Data Extraction Session 	ADE
Ticket #29033 Ticket #33243	Fixed issue with actions disabled in the context menu when documents from multiple groups were selected.s	Desktop
Ticket #32631	If the user copied document names from a stacking order in the "Document Selection Criteria" tab of a batch delivery template, the "Deliver Only These Specific Documents" box could hold all the documents in the stacking order and was truncated. The maximum length of the "Specific Documents" field in the batch delivery template is increased to 100000 characters.	Desktop
Ticket #31959	Fixed performance issue with Desktop slowness when sort mode was opened in folders with a large amount of documents.	Desktop
Ticket #34381 Ticket #34390 Ticket #34391 Ticket #34400 Ticket #34406 Ticket #34408 Ticket #34411 Ticket #34416 Ticket #34417 Ticket #34420 Ticket #34431 Ticket #34444	Stacking order filter settings are reset to default when a user closes the folder. Added a site preference allowing to always set the "Show Documents Included in Stacking Order" by default.	Desktop
Ticket #28917 Ticket #28963 Ticket #30682	Fixed issue with saving delivery packaging templates when the user made changes to the document selection criteria.	Site Admin
Ticket #31162	Fixed issue where users with a role configured for Queue Admin Access could not update queues.	Site Admin
Ticket #32793 Ticket #34023	Fixed address book and stacking counts that were incorrectly displayed and changed as the user scrolled to the bottom of the list.	Site Admin
Ticket #34042	Fixed issue where the Site User/Stacking Orders/Address book tabs did not display the total count with the currently loaded count.	Site Admin