



May 2019 Release Notes

May 2019 Release Notes

Release (May 10, 2019) 19.5.1.0

Capsilon IQ Platform & DV Desktop	4
Automated Document Recognition	4
Q2 2019 Standard Origination and Servicing ADR Learnset 2.1.1.0	4
Release Highlights	4
New and Improved Capabilities	4
Scope	4
Enhancements in the Learnset	4
New Documents Added to the Learnset	4
Enhancements to Recognition Accuracy for Existing Documents	4
Other Notes	5
Compatibility	5
Configuration	5
Automated Document Recognition (ADR)	6
Release Highlights	6
Compatibility	6
Configuration	6
Automated Data Extraction	7
Standard ADE Learnset 3.0.0.0	7
Release Highlights	7
Compatibility	7
Configuration	7
Automated Data Extraction (ADE)	8
Release Highlights	8
Compatibility	8
Configuration	8
Annotation Placeholder Detection (APD)	9
Release Highlights	9
Compatibility	9
Configuration	9
Document Management	10
Desktop	10
IQ Apps	11
Document Submission Widget	11
Release Highlights	11

New and Improved Capabilities	11
Add Messages to Thread Submissions	11
Turn On/Off Message Mode	11
Compatibility	12
Configuration	12
Signing Request App	13
Release Highlights	13
New and Improved Capabilities	13
Apply a Stacking Order to a SR	13
Compatibility	13
Configuration	13
Thread Container	14
Release Highlights	14
New and Improved Capabilities	14
Data Audit	14
Displayed Borrower Name and Property Address	14
Compatibility	14
Configuration	15
Folder Container	16
Release Highlights	16
New and Improved Capabilities	16
Group Cabinets by Office	16
Show a Workspace Name	16
Compatibility	16
Configuration	16
Integration Services	18
LOS Integration	18
LIS2 Ecompass	18
Release Highlights	18
New and Improved Capabilities	18
Improvements to Custom Forms of LIS2 in SmartClient	18
Auto-invitation of Participants to Threads	18
Compatibility	19
Configuration	19
LIS3 Bluesage	20
Release Highlights	20
New and Improved Capabilities	20
Propagation of New Uploads via Threads	20
Tool for Moving Events from Error Queue to Request Queue	20
Compatibility	20
Configuration	20
Data Management	21
Release Highlights	21
New and Improved Capabilities	21
Data Management Core	21
Compatibility	21
Configuration	21

Platform Management	22
Release Highlights	22
New and Improved Capabilities	22
New Privilege for Queue Managers	22
Suppress Thread Invitation Email	23
Compatibility	23
Configuration	23
Customer Health	24
Resolved Issues	24

Capsilon IQ Platform & DV Desktop

Automated Document Recognition

Q2 2019 Standard Origination and Servicing ADR Learnset 2.1.1.0

This release provides a new Q2 2019 Standard Origination and Servicing ADR Learnset 2.1.1.0.

Release Highlights

- Improved document recognition accuracy for Income Analyzer documents.
- Added support for the following new document types:
 - Assignment Of Mortgage Recorded
 - Security Instrument Recorded

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 2.1.1.0 (hereafter referred to as "Learnset").

The learnset augments the documents contained in the Q1 2019 Standard Origination And Servicing ADR Learnset version 2.1.0.0. and recognizes 2 new document types.

Enhancements in the Learnset

The Learnset contains 328 document types, which includes 11 document types for integration with partners/ Capsilon applications and one "Recycle Bin" document type, which are not supported for ADR.

New Documents Added to the Learnset

The following new document types are recognized by this learnset:

Sr. No.	Document Type Description	Document Category
1	Assignment Of Mortgage Recorded	Closing
2	Security Instrument Recorded	Closing

Enhancements to Recognition Accuracy for Existing Documents

This learnset has enhanced recognition accuracy and document bucket accuracy for the following documents:

Sr. No.	Document Type Description
1	Appraisal
2	Assignment Of Mortgage
3	Bank Statement
4	Paystub
5	Tax Returns
6	Verbal Verification Of Employment
7	Verification Of Employment

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.
- This learnset should be deployed along with ADR build 10.5.6.0.
- This learnset should not be used with ADR build 9.x and previous ADR builds.

Configuration

#	Component	Version
1	Standard Origination and Servicing ADR Learnset	2.1.1.0

Automated Document Recognition (ADR)

Release Highlights

- ADR service is enhanced to recognize recorded and unrecorded documents separately.

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
- DocVelocity 19.4.2.0 onwards

Configuration

#	Component	Version
1	ADR	10.5.6.0

Automated Data Extraction

Standard ADE Learnset 3.0.0.0

This release introduces a new Standard ADE Learnset (3.0.0.0).

Release Highlights

- Trained new fields from the following documents:
 - IRS W-2
 - Verbal Verification of Employment
 - Verification of Employment
- Improved the Paystub document template to improve overall accuracy.

Compatibility

- The learnset is compatible with most recent ADE build 5.2.0.0
- Scrubber Value Extractor: 4.3.0.0

Component Dependencies:

This learnset must be deployed along with:

- ADE build above 5.1.0.0
- Learnset: standard-2.9.0.0.zip
- Scrubber Value Extractor: DocVelocity 18.4.0.0 (ADE 4.3.0.0 and Scrubber DLL 4.3.0.0)
- Scrubber Config file

Configuration

#	Component	Version
1	Standard ADE Learnset	3.0.0.0
2	Scrubber Config	2.0.3.41

Automated Data Extraction (ADE)

Release Highlights

- If multiple copies of a document are present on a single page, data will be extracted from a single best copy. This improvement of extraction is implemented for the IRS W-2 document.
- Improved data extraction from the Paystub document (specifically extraction of earnings, period date range, etc).
- Provided support for text extraction on gray patch areas. Text from gray patch areas was not extracted previously.
- Fixed issue that caused a crash during data extraction from the Security Instrument document.

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	5.2.0.0

Annotation Placeholder Detection (APD)

This release addresses an issue in the Annotation Placeholder Detection service.

Release Highlights

- Fixed issue where database insertions failed when the content being inserted contained a single quote.

Compatibility

- DocVelocity 19.4.2.0 onwards.

Configuration

#	Component	Version
1	APD	1.0.2.0

Document Management

Desktop

Important:

The removal of the Data Points and Data Sets tabs from the desktop application, which was previously scheduled for release 19.5.1.0, is postponed till release 19.5.2.0.

IQ Apps

Document Submission Widget

Release Highlights

- The Document Submission Widget now allows users to enter messages when submitting documents to a thread in the IQ browser application (hereinafter referred to as IQ Web¹).
- Provided the ability to turn on/off message mode via configuration.

New and Improved Capabilities

Add Messages to Thread Submissions

- To provide messages for thread submissions, users need to open a thread and click “New Submission”. This opens the 'New Submission' window where users can enter the text of the message in the appropriate field.

New Submission [Close]

Subject*

Message

Attention

Settlement Agent (Settlement Agent) [Dropdown] Sending on behalf of another party

Attached documents Use Automated Document Recognition File documents

Drop files or [browse](#)

CANCEL SUBMIT

¹ The title of the IQ browser application depends on the user type: “IQ Web” for site users or “IQ Portal” for guest users.

Turn On/Off Message Mode

The "messagesMode" parameter is added to the integration script of the Document Submission Widget to turn on/off messaging.

Compatibility

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

Configuration

#	Component	Version
1	Document Submission Widget	19.5.1.7

Signing Request App

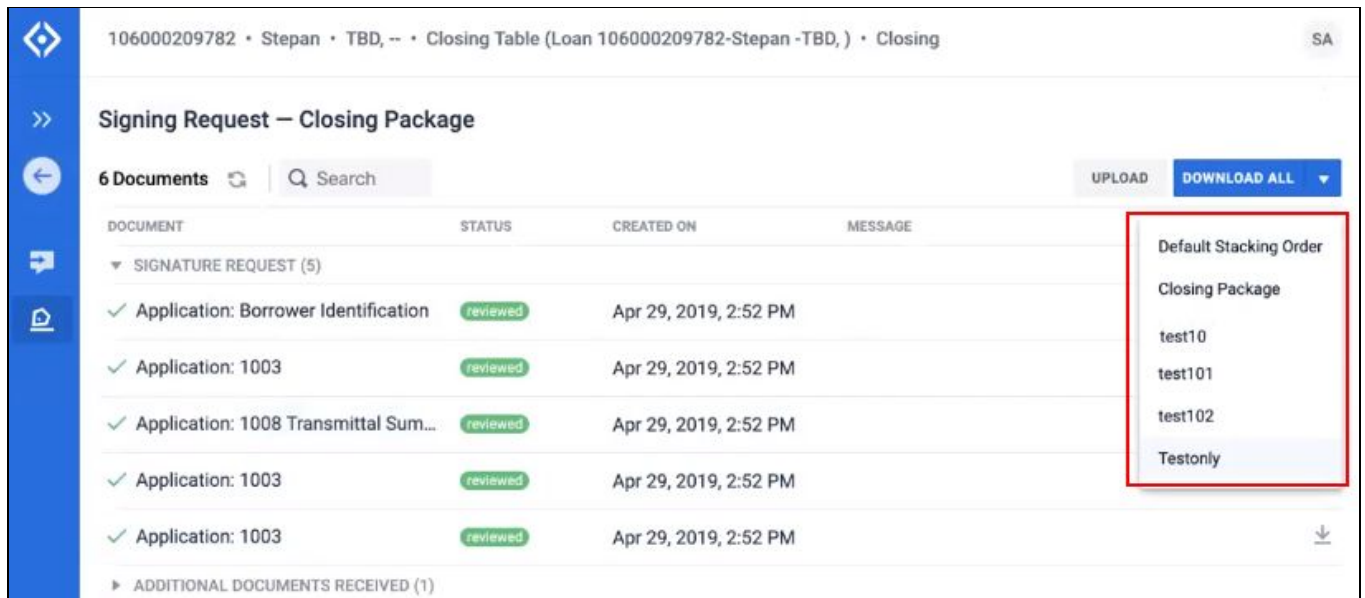
Release Highlights

- Provided the ability to apply a stacking order a package of documents associated with a particular signing request.
- Provided the ability to download a package of documents associated with a particular signing request as a single PDF instead of a ZIP archive.
- Redesigned email templates for manual signing including:
 - Email notification to Settlement Agent for new Signing Request
 - Email notification to Settlement Agent for updated Signing Request
 - Email notification to Funding Review upload to Signing Request

New and Improved Capabilities

Apply a Stacking Order to a SR

Users can choose a stacking order that should be applied to documents downloaded from a signing request. The list of stacking orders can be expanded by clicking the arrow on the “Download All” button.



Compatibility

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

Configuration

#	Component	Version
1	Signing Request App	19.5.1.11

Thread Container

Release Highlights

- Embedded Data Audit into the IQ Web.
- Added the borrower name and property address.

New and Improved Capabilities

Data Audit

The Data Audit application is integrated into the IQ Web and displayed as a tab in the left panel of the thread screen, allowing users to select a data set and view/compare data points across many sources.


The screenshot shows the IQ Web interface. The top navigation bar includes the IQ Web logo, the user ID '1611060778', the borrower name 'John Borrower', and the status 'Closing'. The sidebar on the left contains the following items: 'DOBROVOLSKY_WS', 'Document Audit', 'Thread Application', 'Data Audit' (highlighted), and 'Signing Table'. The main content area displays a 'Select Dataset to edit' dialog with the following table:

NAME	LAST MODIFIED
LOAN DATA	not created CREATE
LOAN DATA2	not created CREATE
LOAN DATA	not created CREATE
LOAN DATA	not created CREATE

At the bottom of the dialog is a [START EDITING](#) button.

Displayed Borrower Name and Property Address

The Borrower Name and Property Address columns are added to the Portals tab.

 FOLDERS PORTALS QUEUES INBOXES				
3 Items Q Search				
LOAN NUMBER	BORROWER NAME	PROPERTY ADDRESS	TYPE	TITLE
▼ RECENT (3)				
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Appraisal	Appraisal
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Origination	Origination
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Audit	Audit
▼ ALL (3)				
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Origination	Origination
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Appraisal	Appraisal
T100099-002	Alice Firstimer	3726 Poplar St, Dawson, County, IA, 50066	Audit	Audit

Compatibility

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

Configuration

#	Component	Version
1	Thread Container	1.0.6.13

Folder Container

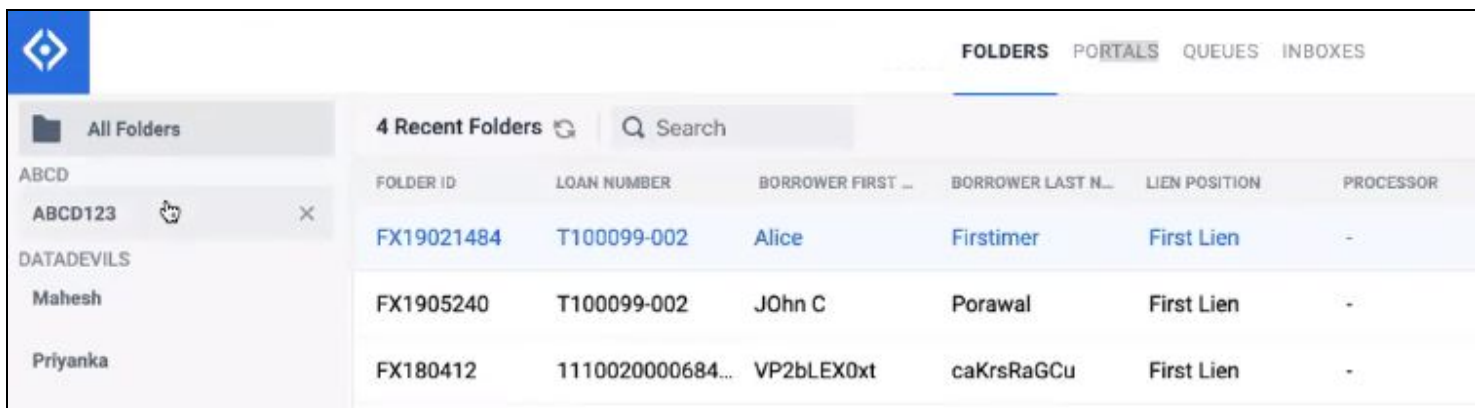
Release Highlights

- Provided the ability to group opened cabinets by office.
- Added a workspace name above the application list..

New and Improved Capabilities

Group Cabinets by Office

A panel is added for viewing offices and cabinets on the Folders tab in the IQ Web. If there are cabinets created for an office, they will be listed below that office in the left panel.



Show a Workspace Name

The name of the workspace selected in the currently opened folder is shown at the top of the left panel on the folder screen.



Compatibility

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

Configuration

#	Component	Version
1	Folder Container	1.0.4.6

Integration Services

LOS Integration

LIS2 Ecompass

Release Highlights

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

- Improved custom forms of LIS2 in SmartClient.
- Provided the ability for LIS2 to automatically invite participants to threads based on configuration.

New and Improved Capabilities

Improvements to Custom Forms of LIS2 in SmartClient

- The custom forms in SmartClient are renamed as follows:
 - "IQ - Launch Folder" is renamed to "IQ - Launch Desktop" for desktop application users and "IQ - Launch Web" for browser application users correspondingly:
 - "IQ - Launch Desktop" opens the current loan in IQ Desktop.
 - "IQ - Launch Web" opens the current loan in IQ Web.
 - "IQ - Launch Thread" is renamed to "IQ - Launch Portal".
 - "DV mirroring tool" is renamed to "IQ - Mirror loan".
- The buttons on the custom forms are named consistently:
 - The "IQ - Launch Desktop" form contains the "Launch IQ Desktop" button.
 - The "IQ - Launch Web" form contains the "Launch IQ Web" button.
 - The "IQ - Launch Portal" form contains the "Launch IQ Portal" button.
 - The "IQ - Mirror loan" form contains the "Mirror current loan" button.
- Debug information is removed from the IQ - Launch Desktop and IQ - Launch Web forms and transferred to a new form "IQ - Debug Information". The "Show Debug Information" button is removed..
- The "Capsilon IQ" logo is added to all custom forms including: IQ - Launch Desktop, IQ - Launch Web, IQ - Launch Portal, IQ - Retrieve FNM 3.2 file, IQ - Mirror loan and IQ - Debug Information.

Auto-invitation of Participants to Threads

LIS can now automatically invite participants to a thread.

- LIS will invite participants only if the mirror folder and a thread for this folder exist, and both are known to the LIS.
- Invitation of participants is triggered by creation or update of a loan.
- LIS only adds new contacts and never removes them.
- An invitation is automatically sent when a new contact appears.
- Participants are configured in config.jobs.encompass.json based on their role.

"participants": [

```

{
  "partyName": "Settlement Agent party",
  "role" : "SettlementAgent",
  "personalMessage": "Hello, Settlement agent!",
  "trackingFieldName" : "CX.DV.SAPARTICIPANT"
},
{
  "partyName": "Closer party",
  "role" : "Closer",
  "personalMessage": "Hello, Closer",
  "trackingFieldName" : "CX.DV.CLPARTICIPANT"
}
]

```

Compatibility

- LIS2 19.5.1.0 requires DocVelocity 18.1.0.0 or higher.
- The corresponding DocVelocity Desktop version is 8.0.3.76 or higher.
- LIS2 19.5.1.0 needs version 18.1 of Encompass or higher.

Configuration

#	Component	Version
1	Encompass Plug-in	2.0.49

LIS3 Bluesage

Release Highlights

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

- Propagation of new thread uploads to BSS.
- Tool for moving events from the error queue to the request queue.

New and Improved Capabilities

Propagation of New Uploads via Threads

Any new document that appears in IQ Filed Docs after an upload via a thread to be propagated to BSS.

Tool for Moving Events from Error Queue to Request Queue

A tool is created to perform the following actions for a given site and application:

- Move events from one queue to another.
- Move events based on their event ID.
- Move all events of a context.
- Move events of the specified event type.
- Move all events.
- Purge specified events based on event ID.
- Purge all events of a context.
- Purge events of the specified event type.
- Purge all events.

Compatibility

- Cloud Services 19.5.1.0.

Configuration

#	Component	Version
1	LIS Service	19.5.1.0

Data Management

Release Highlights

- Supported applicant related fields association with respective collaborators for FNM 3.2 sources.

New and Improved Capabilities

Data Management Core

- DataPointDefinition (CMDD):
 - Note:* There are no new fields supported in CMDD. As in the previous release, CMDD supports a total of 1108 fields.
- Ingestion Configurations²:
 - Introduced additional attributes for data point association with collaborators for the Loan Application document.
 - Made configuration changes for association of Collaborator ID with data points based on SSN.
 - Note:* There are no new fields supported for ingestion. As in the previous release, ingestion supports a total of 1352 fields from ADE and FNM 3.2 sources.

Compatibility

This update should be deployed on top of 19.4.2.x.

Component Dependencies:

- MDM Configurations must be deployed on top of data management components released with v. 19.4.2.x.

Configuration

#	Component	Version
1	CMDD Configuration	19.5.1.0
2	Ingestion Configurations	19.5.1.0

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

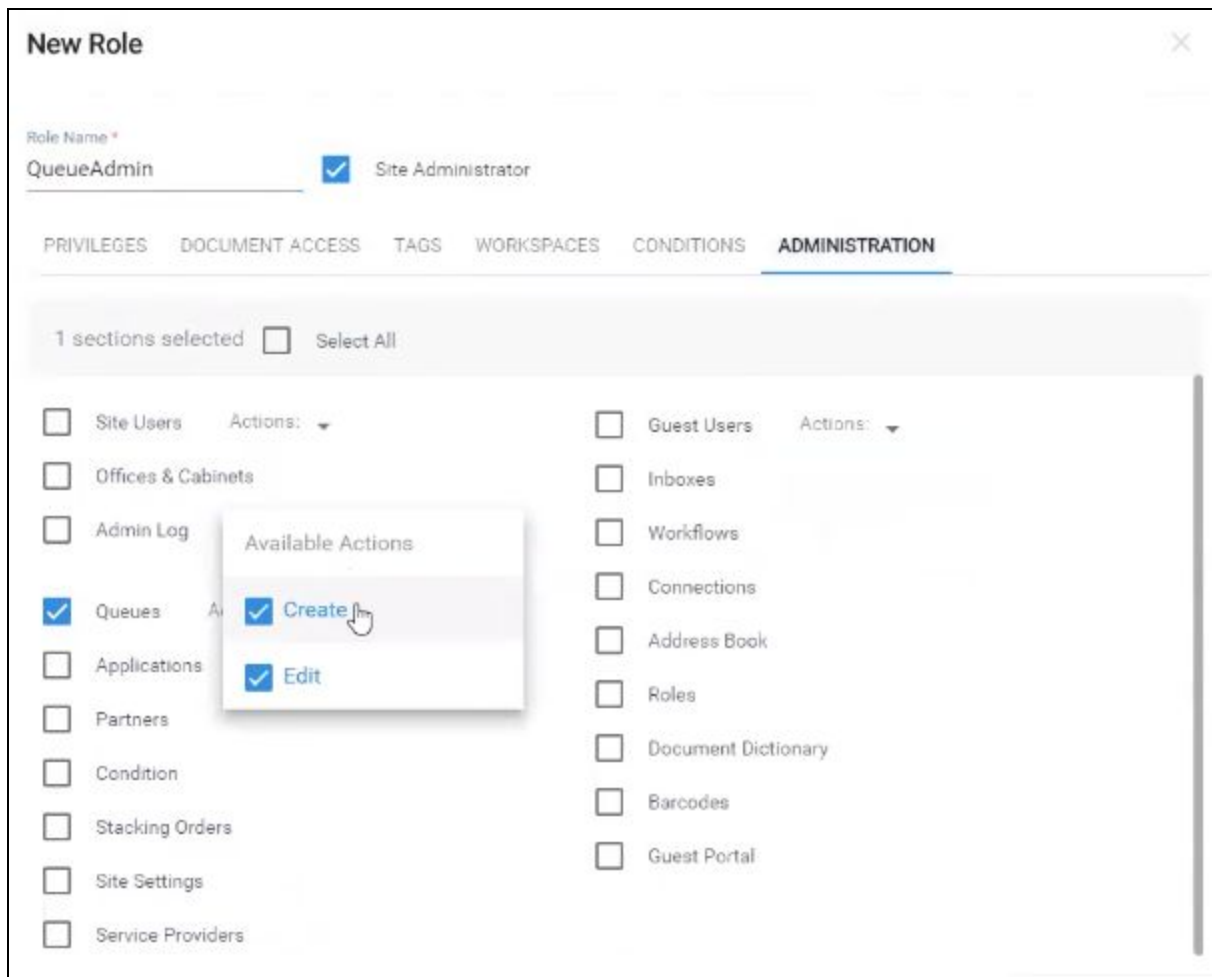
- Added a new privilege for queue management.
- Provided the ability to suppress a thread invitation email to participants based on configuration in the thread template.

New and Improved Capabilities

New Privilege for Queue Managers

Added a new privilege to delegate queue management (creation/editing) to a specific site administrator.

New Role/Edit Role -> Administration -> Queues -> Create/Edit.



Suppress Thread Invitation Email

The "suppressNotifications" configuration parameter in the thread template is introduced to suppress thread invitation emails for a thread party

Compatibility

- This update is compatible with Cloud Services 19.5.1.0.

Configuration

#	Component	Version
1	Site Admin	19.5.1.0

Customer Health

Resolved Issues

Zendesk ID	Description	Area
Ticket #29099 Ticket #29102	Fixed issue where to do a site-to-site transfer returned a network connection error after a database patch.	Document Management
N/A	Fixed several issues with additional documents present in the API output XML.	Document Management