Contents

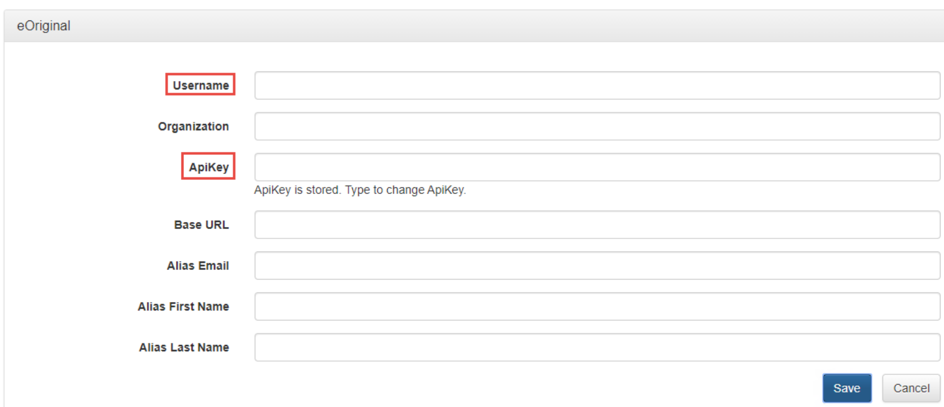
EDOCS CHANGES

Presenter App Changes

- Corrected a random Fatal Error which occur when the Presenter App lost connectivity to eDocs and would fail to reconnect.
- The signer's popup shows when any signer has initiated signing vs when Begin Signing is clicked.
    - The popup shows all point of sale signers instead of only showing buyer signers.

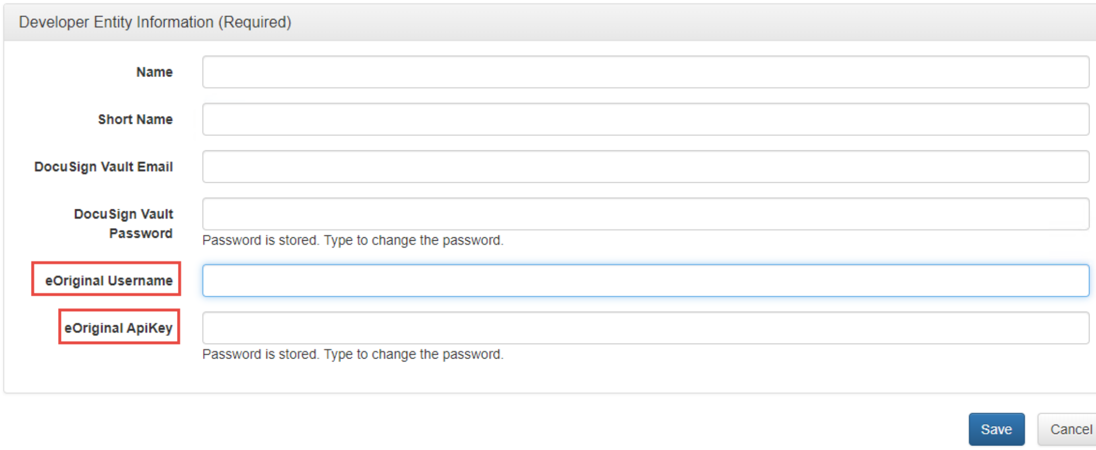
CP App Changes

- Document status updates as the contract is being signed.
- On the Search tab
    - Contract Type and Presenter are now displayed.
    - Corrected document list not updated after multiple account searches.
- Improved CP Application performance with large data.
- Fixed issue where voiding a document would not work if the document was deleted in Image Quest.



Back Office Changes

- The eOriginal configuration page has been updated to include the API user and API key for the parent vault.
- The developer entities page has been updated to include the API user and the API key for the child vaults.

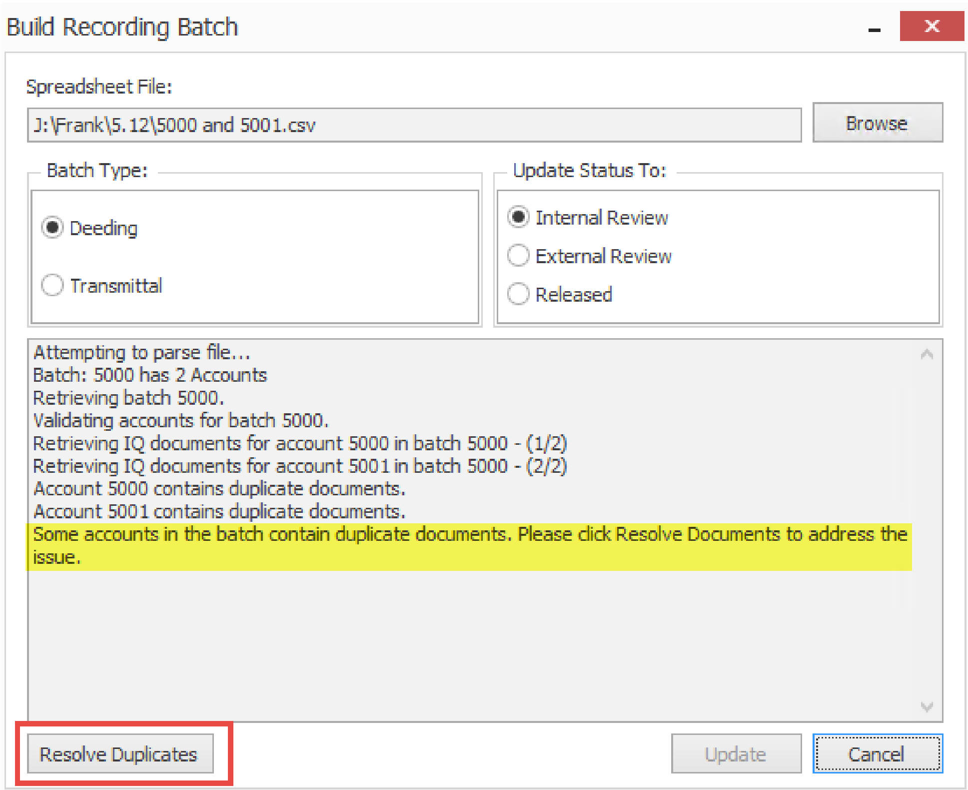


eProposal *

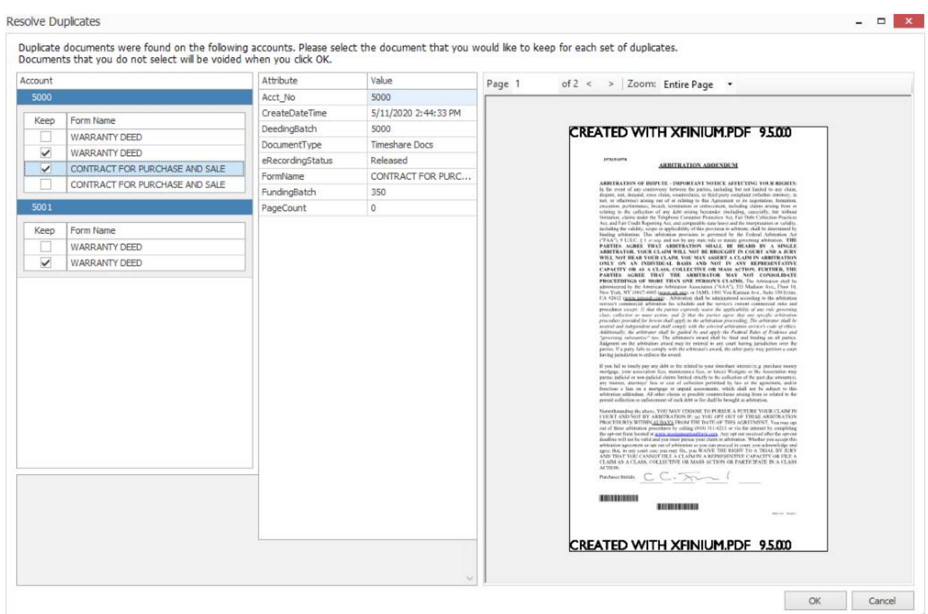
- EProposal documents are added to eDocs and Image Quest upon creation.
- Updated eDocs API to add eProposal documents to eDocs and Image Quest before contract is created in eDocs
- When paper deals are completed through eProposal, the documents are now added to IQ.
- eProposal documents supports revision in IQ before the eDocs account is created.
- eProposal documents supports replacement documents in eDocs and IQ after eDocs account is created.

ERECORDING CHANGES

- For Orange County, human names are now submitted to the county as FirstName, MiddleName, and LastName.
  - If the name has four or more words, then the human name will be sent as OrganizationName.
    - Ex. John A Smith II will be sent as the OrganizationName
- For Horry County, lines appearing on the first page of a submitted account have been removed.
- Failing to update IQ on submissions no longer continually submits the account to the county.
- The method to resolve duplicate documents has been modified for the Build Recording Batch plugin. This is to make the workflow more user friendly and delete the eDocs version of the document if the paper version of the document has been selected to keep.
  - Whenever an account in a batch has duplicate accounts, a Resolve Duplicates button will appear.



- After Resolved Duplicates is clicked, a new window will show for each account that has duplicate documents.
- The user can click a document to view the attributes and image of the document.
- To keep the document, mark the document to be kept.
- After clicking OK, all duplicates that are not marked to be kept will be voided.



- Clicking Cancel will not save any changes that are made in the window.
- After all duplicates are resolved, the user is taken back to the Build Recording Batch plugin, and the user can click Update without having to browse to the batch again.

TECHNICAL NOTES

- The upgrade will update the eDocs County table, if the existing table does not have an expected StateName (expected name example is “Florida” not the abbreviation “FL”) the table will not be updated and a new table Backup_County will be created with the existing data. After upgrade verify the information in the county table.
- API calls made to eOriginal now use the API user and API key instead of the integration user.

API User Configuration Steps:

The steps to create the new API User are detailed below.
Important: an API user must be created for the parent vault and each child vault.

To create a new API User:

1. Log into Command Center using a user account that’s assigned to the Org Administrator group

(you can verify this assignment via Command Center/Preferences/Users).

2. Navigate to Command Center/Preferences/API Users

Note: If the API Users link is not visible under the Preferences section, please contact Informa.

3. Select the “Add User” link

4. Fill in the required Account Information section

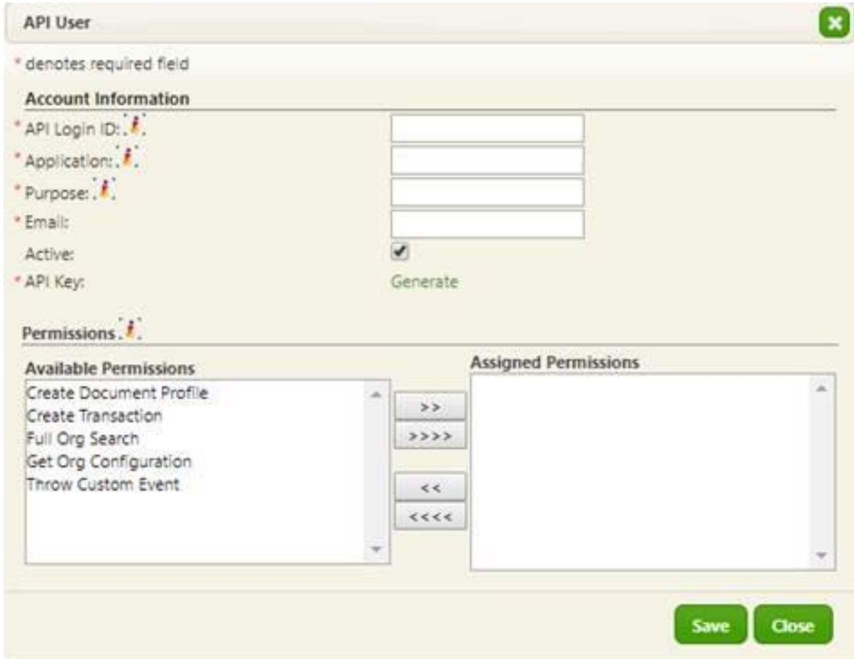
- Note that the “Application” & “Purpose” fields are populated as the API User’s first & last name within the eOriginal Transaction & Document Audit Trails – these fields should be populated as follows:

- API Login ID = API Username
- Note: the new API User cannot use an API Login ID that matches the existing/previous integration user account used.
- Note: that the API Login ID value will be populated as the API User’s first name under participant info in the document and transaction event logs.

- Application = %Your Application Name%
- Note: the “Application” field value should be the name of your submitting/integrated application

- Purpose = “Integration User”
- Note: The “Purpose” field value is populated as the API User’s last name under the participant info in the document and transaction event logs.

- Email = populate a system email address or distro for the submitting application (do not supply an individual user email address)



5. Assign the following permissions to the API User:

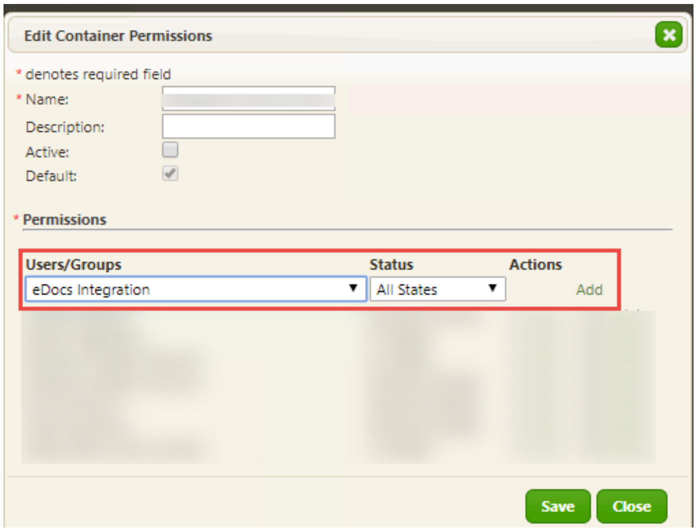
    - Create Document Profile
    - Create Transaction
    - Full Org Search
    - Get Org Configuration
    - Throw Custom Event

    Important: Please confirm that you've assigned only the permissions list above. No additional permissions should be assigned at this time.

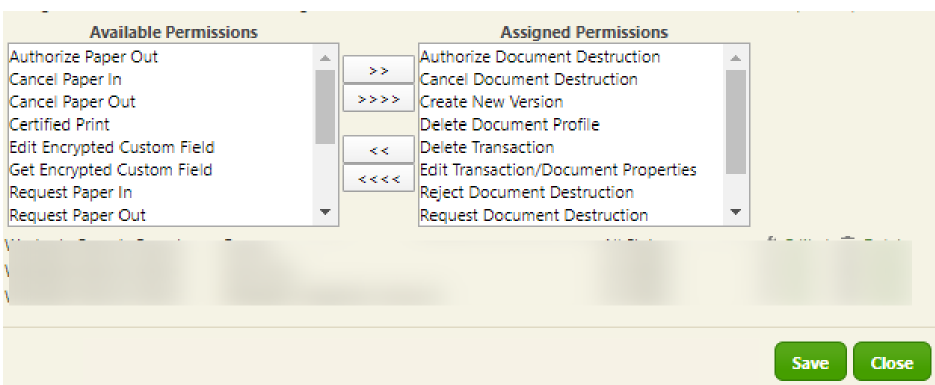
6. Click the "Generate" link next to the API Key reference. This is the API Key that you'll need to pass within the apiKey parameter of the eoLogin API call.

    - **Important:** Save the apiKey as this is needed to configure eDocs eOriginal configuration and developer entity configuration.

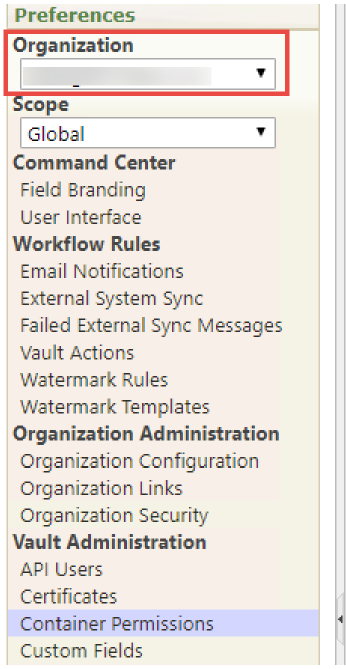
7. Container permissions must be set for each API user for the parent vault and all child vaults.
    - Login as the parent vault.
    - Under Preferences, go to Container Permissions. Edit the current container permission.
    - Under Users/Groups, select the API user that was created and click Add.



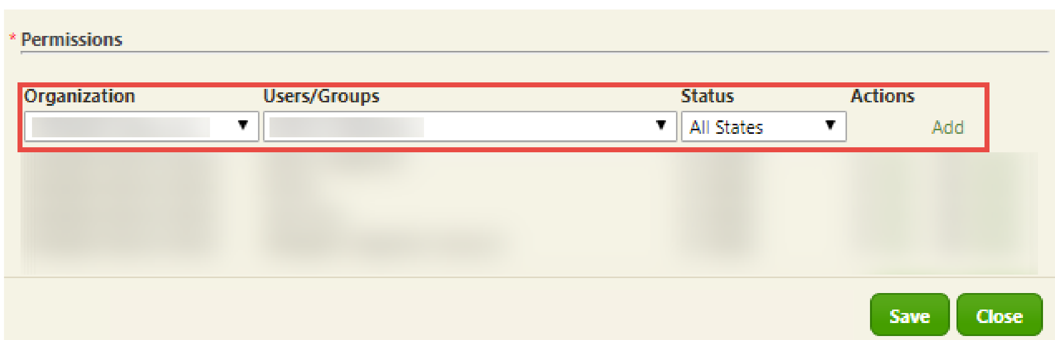
- Add the following permissions and click Save:
    - Authorize Document Destruction
    - Cancel Document Destruction
    - Create New Version
    - Delete Document Profile
    - Delete Transaction
    - Edit Transaction/Document Properties
    - Reject Document Destruction
    - Request Document Destruction
    - Retrieve Document
    - View Transaction/Document Properties



- To set container permissions for each child, login to the parent vault, go to Preferences. From the Organization dropdown, choose the child vault that needs container permissions added, then click Container Permissions.



- Edit the existing container permission.
- Change the Organization dropdown to the **parent vault**, select the API user under Users/Groups, and click Add.



- Add the following container permissions and click Save.
    - Authorize Document Destruction
    - Cancel Document Destruction
    - Create New Version
    - Delete Document Profile
    - Delete Transaction
    - Edit Transaction/Document Properties
    - Reject Document Destruction
    - Request Document Destruction
    - Retrieve Document
    - View Transaction/Document Properties
- **Note: The parent vault's API user must be added to each child's container permissions to vault documents.**

*Only available for organizations that have eProposal