

MGIC Automatic Document Upload setup in the Enterprise Lending Center by Mortgage Cadence

1. Access the Document Handling module in the ELC Administration

- Select the **Groups** tab.
- At the bottom of the **Document Groups** list, you will see **<New group>** displayed.
- Name the **<New group>**. In this case, use the name **AutoUpload**.

The screenshot shows the 'Document Handling' interface with the 'Groups' tab selected. The 'Document Groups' list is visible, and the '<New group>' entry at the bottom is highlighted with a red box and labeled with 'b'. The 'Document Types' list on the left includes items like '0000 - Spacer', '1-4 Family Rider', and '1003 - Loan Application'.

2. Move the documents into the newly created Document Group

Drag and drop the documents from the **Documents Type** list to the new **AutoUpload** Group that you created.

The screenshot shows the 'Document Handling' interface with the 'Groups' tab selected. The 'Document Types' list on the left has '1003 - Loan Application' highlighted in red. A red arrow points from this document to the 'AutoUpload' group in the 'Document Groups' list. Below the groups list, a table shows the document '1003 - Loan Ap...' has been moved to the 'AutoUpload' group.

Decription	Name	Category Name	Sort Order
1003 - Loan Ap...	MC1003	No Category	1

3. Navigate to the ACE Action Instances and Events tab.

- In the **Event Instances Properties** section, enter **Document_Handling_AutoUpload** in the **Instance Name** field.
- Check the **Active** box.
- In the **Event Admin Properties** section, navigate to the **Security Groups with Access** section and check the **MCAdministrators** box.

Event Instance Properties

Instance Name: Document_Handling_AutoUpload

Active:

System:

Instance Description: [Empty]

Actions Assigned

Action	Priority	Instance	Active/Inactive	Rule	Sync/Async
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Execution Location(s): Business Server Data Type(s): Loan Data

Allow Execution Method(s): Asynchronous,Synchronous Open

Event Admin Properties

Use Sub-menu: [Dropdown]

Security Groups with Access:

- IDC Group
- KRB Test
- Least Restrictive
- MCAdministrators
- MFA Group
- Most Restrictive
- Originator

Select All Unselect All

4. Navigate to the Document Handling Export

- Click the **Add** button.
- In the **Action Instance Properties** section, add the new **AutoUpload** name in the **Instance Name** field.
- Check the **Active** box.
- In the **Events Assigned** section, type in the new Event you created in Step 3 (Document_Handling_AutoUpload).

Action Instance Properties

Instance Name: AutoUpload

Active:

Executes on Scenarios:

Action Rule: [Empty] Priority: 500

Instance Description: [Empty]

Events Assigned

Module	Field	Active/Inactive	Event
Web Client		True	Document_Handling_AutoUpload

Execution Location(s): Business Server Data Type(s): Loan Data

Execution Method: Asynchronous

Add Remove

5. Make your selections in the **Action Admin Properties** section

- a. **Doc Groups** - select the document group you created in Step 1 (AutoUpload).
- b. **Export File Path** – enter the file path (SFTP) provided to you by MGIC.
- c. **Output** – select **Zip containing individual PDFs**.
- d. **Use SFTP** – select **Yes**.
- e. **Credentials** – select **Default**.
- f. **Server Name** – enter in the server path provided by MGIC.
- g. **Port** – enter 22.
- h. **User Name** – enter your user name provided by MGIC.
- i. **Password** – enter your password provided by MGIC.
- j. **Document Status** – check **Received** box.

The screenshot shows the 'Action Admin Properties' configuration window. It is divided into several sections:

- Doc Groups:** A list of document groups with 'AutoUpload' selected. A red letter 'a' points to this list.
- Export File Path:** A section with a 'File Path' text box containing '/home/qaelcdoc/inbound/loandocs' (pointed to by 'b'), an 'Output' section with 'Single PDF' and 'Zip containing individual PDFs' radio buttons (the latter is selected, pointed to by 'c'), and a 'Use SFTP' section with 'No' and 'Yes' radio buttons (the latter is selected, pointed to by 'd').
- Impersonation and File Access Information:** A section with 'Credentials' radio buttons for 'Default' (selected, pointed to by 'e') and 'Impersonate', a 'Domain' text box, a 'User Name' text box containing 'CompanyAdminUploadDoc' (pointed to by 'h'), and a 'Password' text box containing '*****' (pointed to by 'i'). There are also 'Server Name' (pointed to by 'f') and 'Port' (pointed to by 'g') text boxes.
- Export Documents with the following statuses:** A table with columns 'Selected' and 'Document Status'. The 'Received' row has a checked box in the 'Selected' column (pointed to by 'j'). Other rows include 'OK', 'Not OK', 'Final', and 'Not Received', all with unchecked boxes.

For advanced setup instructions, contact Mortgage Cadence Enterprise Lending Center Technical Support at 866-627-4411.

Contacts:

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