**USA DIGITAL** SOLUTIONS INC.

# Impact Online

## Version 3.1.15

# Site and User Administration

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# Introduction

Impact Online v3.1.15 is the latest release for use with the Impact/SQL Title and Escrow software suite. Impact Online is a web-based application that allows clients to open orders and to view critical escrow file information, including documents and escrow status, from anywhere, through the convenience of a web browser. Additionally, Impact Online allows external clients to enter new orders via the web. The application is directly integrated with the Impact/SQL Title and Escrow software suite, so all information shown is up-to-date. Impact Online v3.1.15 requires the Impact/SQL database to be on version 7.5.4 or higher. Impact Online is compatible with Internet Explorer 6.0.

This manual, <u>Impact Online – Site and User Administration</u>, provides the hosting company's administrative staff with the information needed to manage their Impact Online site, and administer user accounts. Site Administration will be discussed first, and then User Administration will be explained.

The URL for the web site will be established by the Company.

When USA Digital Solutions, Inc. initially sets up the Impact Online web site, they will configure an Administrator account, with rights to Site Administration and User Administration, and will provide the login and password information to the appropriate personnel.

The Site Administrator will login into the web site, via the Login Screen, with the Administrator account. The Impact Online Login Screen is presented here. Enter the Administrator Username and Password, then click on the **Login** button.
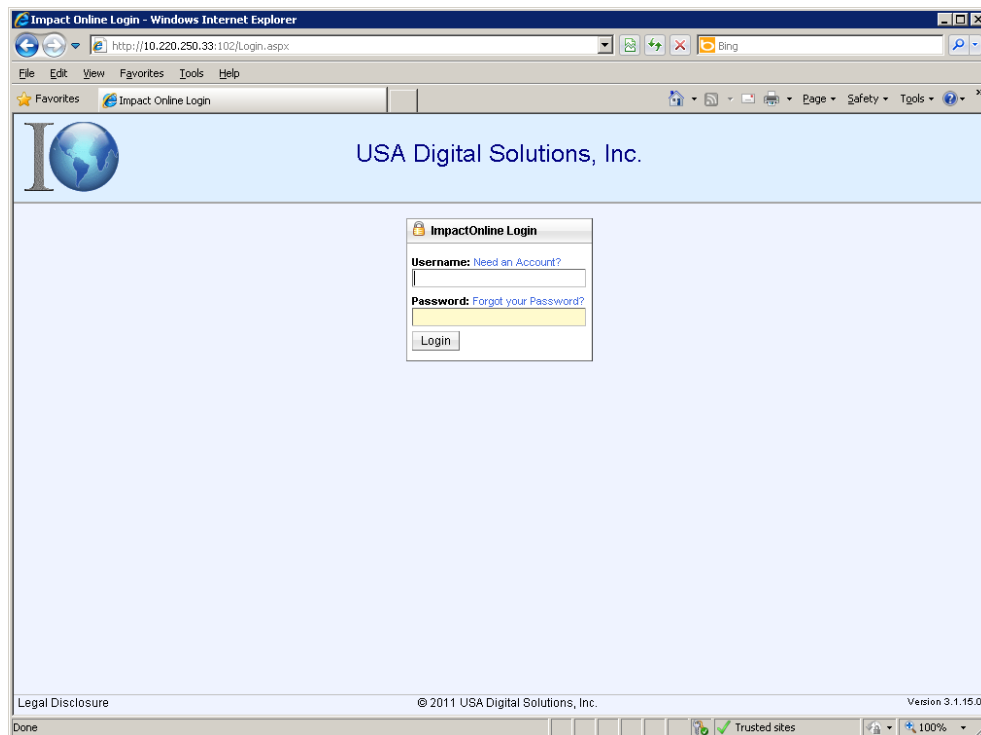
# Site Administration

Upon login, assuming the user has full administrative permissions, the user will see six tabs across the top of the web page: **My Home**, **Order Entry**, **My Account**, **User Administration, Site Administration** and **My Portals**.  The selected tab's label will be highlighted.

Site administration is done through the Site Administration page of the Impact Online web site. Click on the Site Administration page to select it.  It is used to configure system-wide options which, in some cases, may override user level permissions.  Access to the Site Administration page is controlled by user permissions. The screen shot below presents the Site Administration page.  There are three primary areas of administrative control: **Site**, **System** and **Integration**, each of which is on a separate tab.

## Site
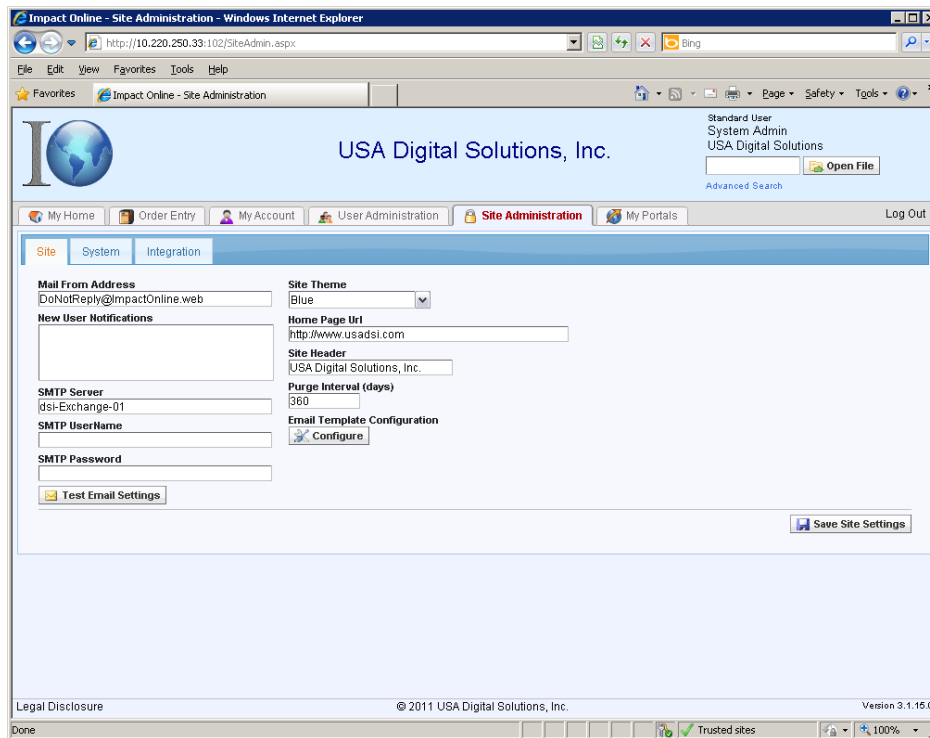


The left side of the Site tab contains fields into which information is entered to manage email communications from Impact Online to users.  There are four fields in the section:

- **Mail From Address** – this is the address shown as the sender for email communications from Impact Online to users.  For example, if a password is forgotten and a temporary one is requested, this will be the "From" address the user sees when they get the email with their new password.

- **New User Notifications** –Email addresses of internal personnel who should be notified when an account is requested through the web site; assuming "Enable Account Request" is turned on.

- **SMTP Server** – the name of the SMTP server to be utilized by Impact Online, for sending email is entered in this field.  No slashes are required, just the server name.

- **SMTP UserName** – enter the username Impact Online's email routine should use to connect to the SMTP server, if required.

- **SMTP Password –** enter the password Impact Online's email routine should use in conjunction with the SMTP UserName, if required. The account should be set to not have expiring passwords, or constant maintenance of this field will be required.

Once the fields are complete, clicking on the **Test Email Settings** button will trigger the sending of an email to the user that clicked on the button. If the test is successful, the user will get a popup altering him/her that the test succeeded. If the settings are not successful, the user will get an error message and a descriptive explanation as to why the test failed.

There are currently three generic **Site Themes**, or color schemes: Blue, Gray and Green. If the client wishes for another theme to be created, to more closely match their corporate color scheme, USA DSI will do so, for a fee.

The logo on the top left of the screen is managed by placement of a logo file into the appropriate location for the web site files. USA DSI will take care of that at configuration.

The navigation options section of the Site tab contains fields used to manage the users' experience on the Impact Online site. There are three fields in the section:

- **Home Page URL** – enter the Company's web site's home page URL into this field. If linking to an external site, enter URL as HTTP://www...etc. If linking to a page on the site, enter "..\" followed by the name of the page.

- **Site Header** – enter the text (normally the Company's name) into this field. It will appear at the top of each main page on the Impact Online site.

- **Purge Interval (days)** – this is a numeric only field that describes the number of days that a file will remain on a user's Watch List from the date the file was closed.

The **Email Template Configuration** button will open a screen of that name, on which the **Default** template will be identified. Clicking on the Default link will open an **Email Template** screen, as shown below, on which the email subject line can be customized as well as the email body. There are two fields that can be inserted into the subject line: **CurrentDateTime** and **FileNumber**.
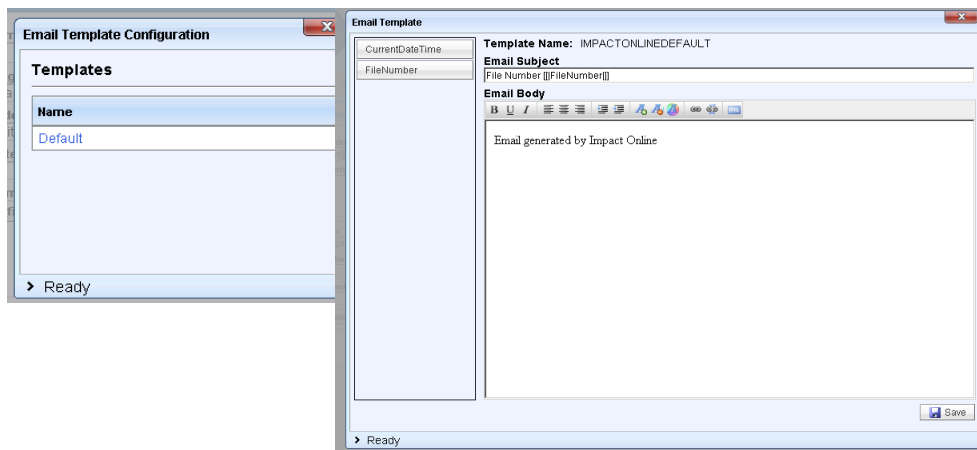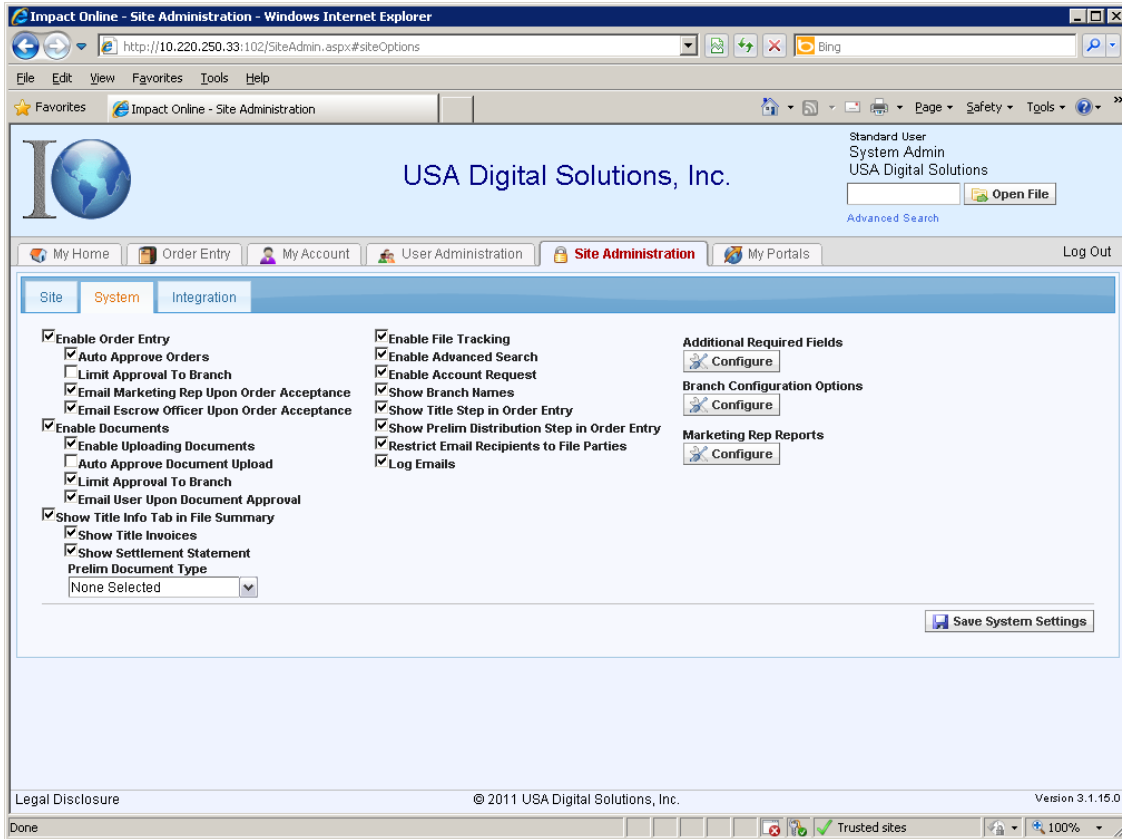


Click on the Save button when editing of the template is complete, to save changes made.

Click on the Save Site Settings button to save any changes made to the Site tab fields.

# System

The System tab contains a listing of the options that can be enabled to customize the Impact Online environment.



There are a series of check boxes which are used to enable or disable the various options, which will be detailed below. Simply clicking on the check box in front of the option enables (checked) or disables (unchecked) the option.

## Enable Order Entry

Turning on this option will allow users to enter data, and edit data, on orders they wish to place with the Company. This is a primary function of Impact Online, so will most often be enabled. There are three sub-options under **Enable Order Entry**. The sub-options are:

- **Auto Approve Orders** – when this option is turned on, orders entered by users will automatically be accepted and a file number will be granted to them. When the option is turned on, on the System tab, the Administrator will be warned that all currently pending orders will be approved, if the change to the option setting is saved. This option is not typically enabled, so the Company can review orders before accepting them, to avoid duplicates.

- **Limit Approval to Branch** – when this option is turned on, the internal users will be limited to approving orders in their assigned branch only. Users with 099 Title or 999 Accounting Branch rights will not be restricted by this option.

- **Email Marketing Rep Upon Order Acceptance** – turning this option on will result in email notifications going to the Marketing Representative linked to an order, when the order is accepted either automatically or manually.

- **Email Escrow Officer Upon Order Acceptance** – turning this option on will result in email notifications going to the Escrow Officer linked to an order, when the order is accepted either automatically or manually.

Note: if Enable Order Entry is not already enabled, and any of the sub-options is enabled, Enable Order Entry will be enabled; contrarily, if Enable Order Entry is unchecked (switching from enabled to disabled), any sub-options previously selected will be disabled.

## Enable Documents

Turning on this option will turn on the document management function of Impact Online – permitting documents to be uploaded from Impact to Impact Online, and then for them to be viewed by Impact Online users.  This is also a primary function of Impact Online, so will most often be enabled.  There are three sub-options under **Enable Documents**.  The sub-options are:

- **Enable Uploading Documents** – turning on this option will permit non-Impact (outside) users to upload documents to Impact Online (this is distinct from the uploading of docs from Impact).

- **Auto Approve Document Upload** – when this option is turned on, documents that are uploaded by outside users will automatically be accepted and will be viewable via Impact Online.  When the option is turn on, on the Site Administration screen, the Administrator will be warned that all currently pending documents (awaiting approval) will be approved, if the change to the option setting is saved.  This option is normally not enabled, so the Company can review documents before they are exposed to the public.

- **Limit Approval to Branch** – when this option is turned on, the internal users will be limited to approving documents in their assigned branch only.  Users with 099 Title or 999 Accounting Branch rights will not be restricted by this option.

- **Email User Upon Document Approval** – turning this option on will result in email notifications going to the person who posted the document, when the document is approved for viewing on Impact Online.

Note: if Enable Documents is not already enabled, and any of the sub-options is enabled, Enable Documents will be enabled; contrarily, if Enable Documents is unchecked (switching from enabled to disabled), any sub-options previously selected will be disabled.

## Show Title Info Tab in File Summary

This option will permit some additional information to be presented to the clients.  These would generally be used if the Company is using the Sub-Escrow functionality of Impact/SQL.  The sub-options are:

- **Show Title Invoices** – this option will let invoices generated in the Title module be viewed by clients.

- **Show Settlement Statement** – this option will let the sub-escrow statement be viewed by clients.

- **Prelim Document Type** – a selection is made, of the available entries, to label the prelim or commitment documents as such.

## Enable File Tracking

The **Enable File Tracking** option will permit outside users to see the File Tracking information recorded in Impact/SQL, for the files on their Watch List.  There are no sub-options for this setting, it is simply on or off.

## Enable Advanced Search

The **Enable Advanced Search** option will turn on a more robust search function within Impact Online, along the style of a "Google" search, rather than the basic search by File Number.  This will enable an outside user to locate a file by entering a name of a party to a file, or an address, for example, if they don't know the file number.  An outside user will only see search results of files to which they are a party. There are no sub-options for this setting, it is simply on or off.

## Enable Account Request

The **Enable Account Request** option will permit outside users to request the establishment of an Impact Online account, on their own, from the Impact Online Login screen.  Note the **Need An Account?** link, on the login screen shot shown earlier…that is an indication this option is turned on.  When this option is turned on, and a user selects the link, they are presented with a screen that collects information from the potential user and sends it to Impact Online Administrators, who will confirm or deny the request.  Upon confirmation an email will be sent to the party that requested the account, with login information.

## Show Branch Names

The **Show Branch Names** option, if <u>unchecked</u> will show the Branch Address (rather than the branch name) in Branch dropdowns in Order Entry and on the My Account page.  The branch names and addresses are managed within the Impact/SQL Branch setup function.

## Show Title Step in Order Entry

This option will include a section in the order entry wizard that permits the user to select the Company title officer to be assigned to the order or enter information on an external title officer and title company.

## Show Prelim Distribution Step in Order Entry

This option will include a section, of two screens, in the order entry wizard that lets the user enter information on who should receive copies of the prelim, CC&R's and other docs, and how they are to be delivered.

## Restrict Email Recipients to File Parties

This option will only let email recipients to be picked from a list of email addresses linked to parties to the file.  The user will not be able to add addressees (other than off the list presented) to email being sent out of Impact Online.

## Log Emails

This option will keep a log of emails sent out of Impact Online, by file.  The log can be viewed from the File Tracking screen.

On the right side of the **System** tab, there are three **Configure** buttons, the purpose of each is described below.

- **Additional Required Fields** - when the Configure button below this heading is clicked, a listing of fields that can be made mandatory, in addition to those that Impact Online mandates by default, is presented for the administrator to select from, as shown to the right. Click on the **Save Options** button after making the desired changes to the required field listing. Closing the screen with the "X" in the upper right corner will NOT save changes.
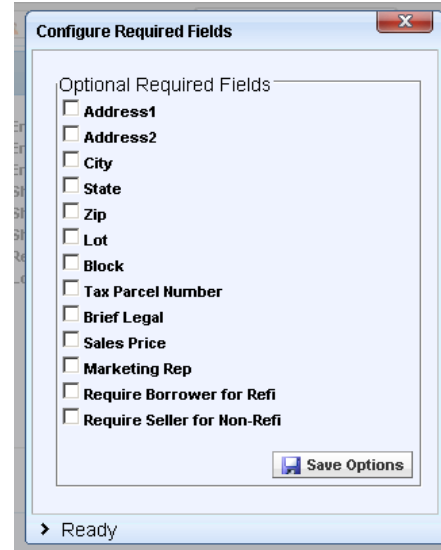
- **Branch Configuration Options** – when the Configure button below this heading is clicked, a listing of the existing branches, of the Escrow branch type in the Impact/SQL database, is presented. Fields are provided into which **Alternate Branch Names** can be entered – for use in cases where the name in Impact/SQL is not the name that the clients are familiar with. A checkbox is used to indicate that the alternate names should be presented in Impact Online. Click on the **Save Options** button after making the desired changes to the required field listing. Closing the screen with the "X" in the upper right corner will NOT save changes.
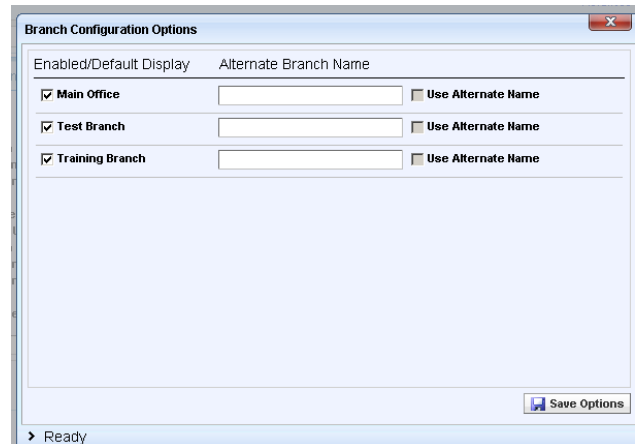
- **Marketing Rep Reports** – when the Configure button below this heading is clicked, a screen will present that will list any existing reports that have been added to the system, and a **Create New Report** button is used to add another report to the Marketing Rep Report Menu. The Add Report screen needs the report menu name (Description) and the name of the Crystal Report file name of the report itself (prepared by DSI, and installed on the Impact Online server).
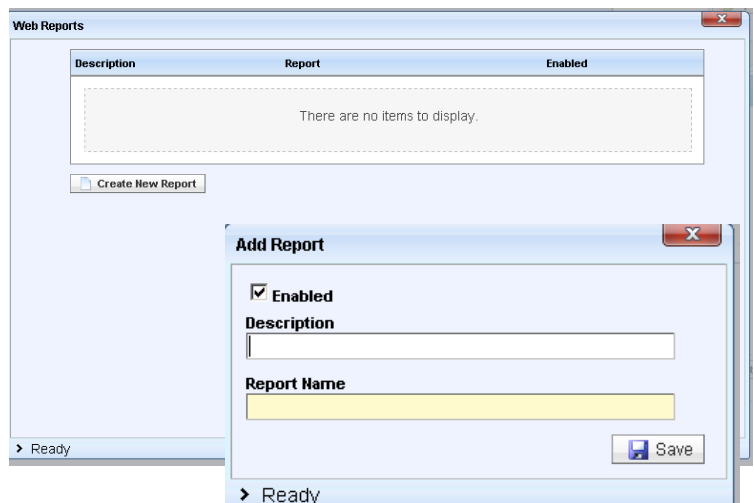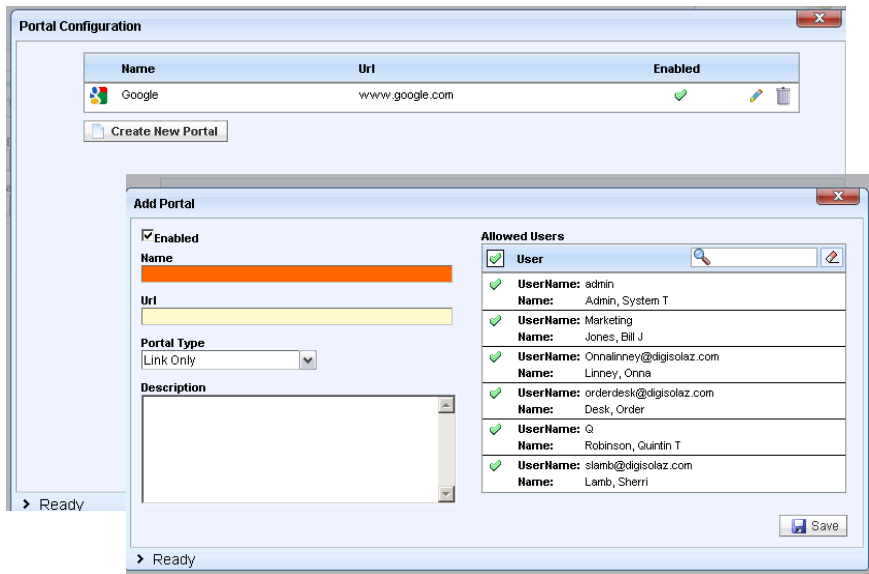
# Integration

The **Integration** tab, under **Site Administration**, is used to manage information on external document storage integrations that may be utilized with the Impact Online installation and to configure any portal links that are to be presented on the users' **My Portals** tab.
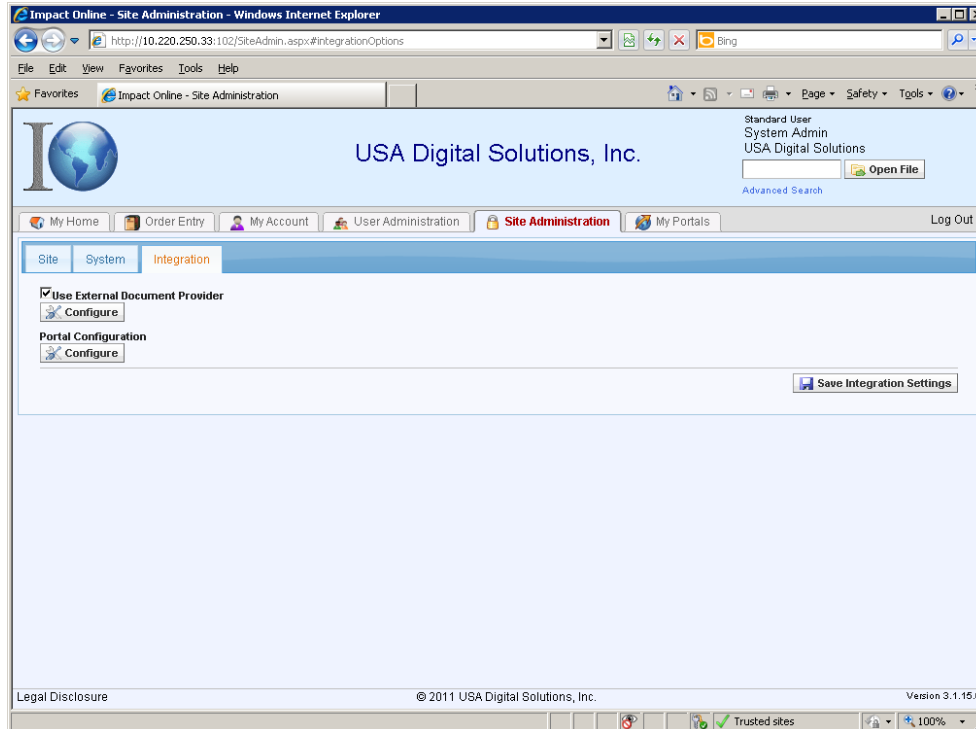


Clicking on the checkbox in front of the **Use External Document Provider** option will trigger a **Configure** button to appear. Clicking on it will present a screen on which an integration to an external document provider can be selected. Presently, **ePaperless File** is the only such integration that exists for use with Impact Online. This option will replace the traditional Impact Online document management functionality with that of an external document management system (currently ePaperless File is accommodated), still within the Impact Online framework. An ePaperless File customer can select this option to combine the functionality of ePaperless File with that of Impact Online, to provide for a single client interface – rather than the client being forced to use Impact Online to open orders and then, separately, go to an ePaperless File web site to view documents.

- Clicking on the **Portal Configuration** button will bring up a screen through which links can be configured for use on the **My Portals** tab. The **Create New Portal** button is used to bring up a screen on which the **Name** of the portal is provided, the **URL** for the site is entered, whether the Portal Type is a **Link Only** or whether credentials must be passed (which would be entered in the **Description** box) and the Impact Online users that should have access to the portal are identified. Click on the Save button to save changes made. Closing the screen with the "X" in the upper right corner will NOT save changes.

Use the **Save Integration Settings** to save any changes made on the **Integration** (and **System** and **Site**) tab. Exiting the Site Administration tab, without clicking on the Save Settings button on whichever tab you are on (Site, System or Integration) will abandon all unsaved changes. You will **<u>not</u>** be warned that changes have not been saved.

# User Administration

The **User Administration** page, selected by clicking on the tab labeled User Administration (visible only if the logged in user has **Add New Users** rights), is used for User Administration.  Once selected, the page presented displays information on all users, in alphabetic order of **User Name**, as shown below.
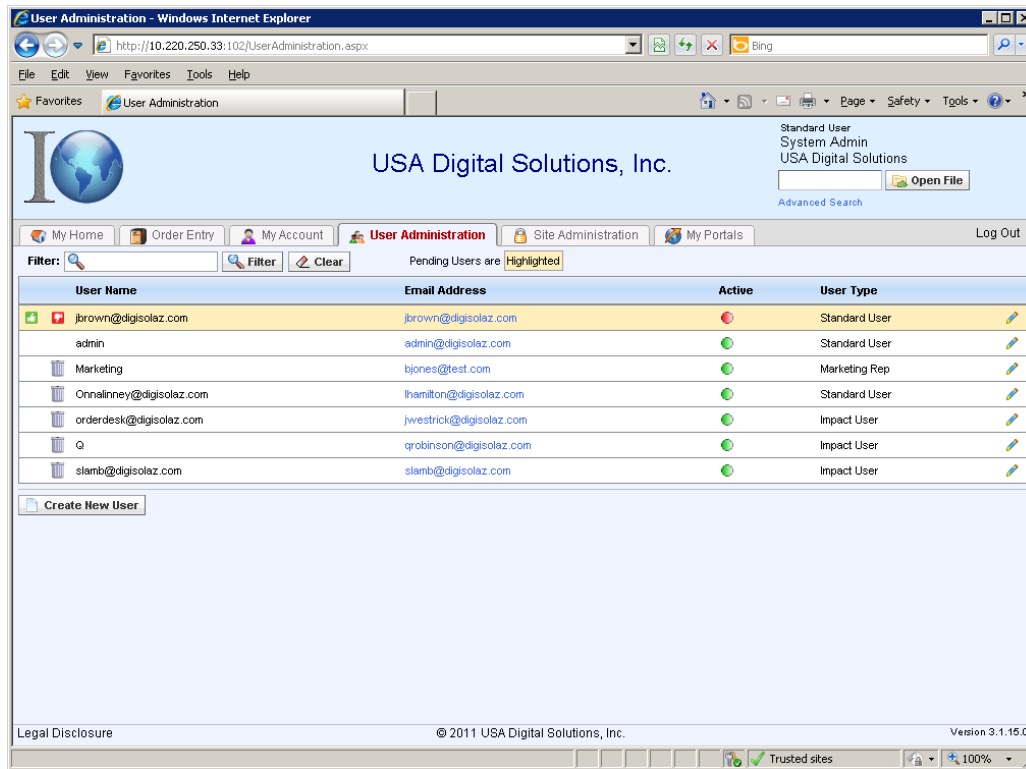


The Filter function above the user listing can be used to quickly locate a user.  Simply enter a portion of the user name and click on the Filter icon.  Use the Clear icon to reset the filter to blank.

In front of existing accounts, the trashcan icon is used to delete a user.  The administrator will be prompted to confirm that they want to delete the selected user.

The edit icon, to the right of each user, is used to open up the Edit User screen (discussed below).

## Activating Users

If the system is configured to allow people to request an account, and people have used the **Need an Account?** function, they will appear as **Pending Users**, are highlighted and will appear at the top of the listing – to alert the Administrator that there are users to be approved or declined. There are Approve and Deny icons in front of pending user entries and they are used to approve or deny the user.  Before that decision is made, the user's information should be reviewed for validity and to ensure it is not a duplicate request.  In addition, the user's permissions should be set before a user is approved.  User information can be accessed with the edit icon to the right of each user record.  When the Approve icon is used, the user will receive an email notification, with a temporary password to be used along with their email address, to log into Impact Online.  They will be entered into the listing in alphabetic order.

# Create New User/Edit User

The **Create User** ( Create New User button) and **Edit User** screens are essentially the same screens. They have different screen labels, and the Edit version of the screens presents a **Change Password** link.

The **Change Password** link will bring up a screen from which a randomly generated password will be emailed to the selected user, with instructions to the user to login with the temporary password and change the password to one of their choosing. The email address used will be that in the **Email Address** field on the **Edit User** screen. The **Change Password** link, when used by the user, will cause a popup to be displayed with three required fields: **Current Password**, **New Password** and **Re Enter New Password**. If the **Current Password** entered by the user does not match their existing password, a message will be displayed stating that fact. If the **New Password** does not match the **Re Enter New Password** entry, a message will be displayed stating that fact. If the validations pass, the new password will be saved and will be ready for immediate use.

## Required Fields

Required fields are highlighted on the **Create User** screen.

The **User Name** is a required field, and must be unique to the database. Normally, this will be an email address. The **First Name** and **Last Name** fields are required. The **Email** field is required, and must be unique to the database. The Email field is validated to confirm it contains an "@" sign and a "." (period). The **Phone**, **Address 1**, **City**, **State** and **Zip Code** fields are also required.

The User Type field is used to identify if a user is one of three types. Permissions vary by type, as will be explained below. The types are:
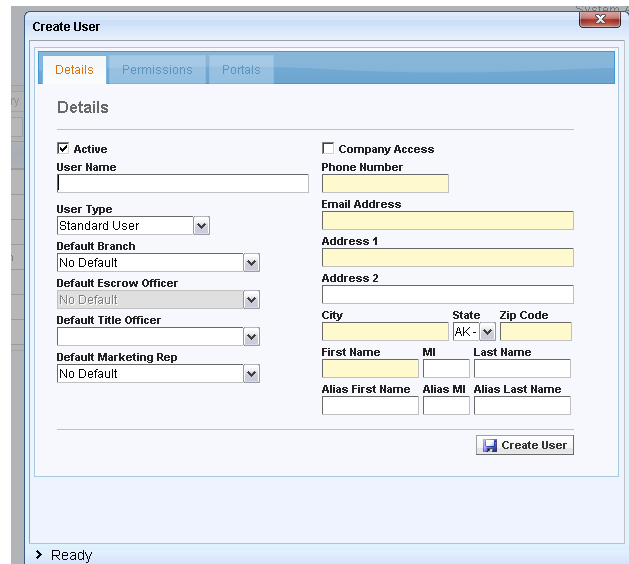
**Standard User** – outside client

**Impact User** – Company employee that accesses Impact Online. When selected, the listing of Impact users will be presented, from the database, and the link to the Impact user should be made.

**Marketing Rep** – Company employee in a Marketing Rep role. When selected the listing of Impact Marketing Reps will be presented, from the database, and the link to the appropriate entry should be made.

## Default Drop Down Boxes

The selections made in the dropdown boxes will be used during the order entry process, to set default values for the user's order. They can be changed at the time of order entry.

The **Default Branch** that should be assigned to the user (if an external user, the branch they are used to working with would be selected; if an internal user, the branch they work out of would be selected).

The **Default Branch** drives both the **Default Escrow Officer** and **Default Title Officer** textboxes. Those two drop down boxes will only show EO's and TO's available for the specified default branch, respectively.

The **Default Marketing Rep** dropdown will present all Marketing Reps in the database.

The **Company Access** feature allows you to grant all users working for a company access to all files that any of the users working for that company are a party to. When the checkbox is checked, a Company Name field will present for completion. The spelling of the company name must be consistent among all users that share it.

Once a user's information is entered, the **Create User** button at the lower right of the screen should be clicked. This will check that the user is unique to the database and will open up access to the Permissions and **Portals** tabs.

## Permissions

The **Permissions** tab will present different options depending on the **User Type** selected. If the User Type is changed, the **Save Details** button must be clicked before going to the Permissions tab, in order for the proper listing of permission options is presented.

Standard users will present with the following options they can be granted:

- **Order Entry –** this permits the user to enter orders via Impact Online.

- **Uploading Documents –** the user is permitted to upload documents to Impact Online.

Impact users will present the options above and the following additional options they can be granted:

- **Order Approval –** the user can approve orders entered into Impact. This permission would be granted to internal, Company users.

- **Adding New Users –** this permission will let the user add, edit and delete users.

- **Approve Documents –** the user can approve documents that have been uploaded. This would normally be granted to internal, Company users.

- **System Configuration –** the user can access, and utilize, the User Administration and Site Administration pages. A very limited number of users should have this permission.

Marketing Rep users will only have the following two options available to them:

- **Adding New Users –** this permission will let the user add, edit and delete users.

- **Uploading Documents –** the user is permitted to upload documents to Impact Online.

Check the appropriate permission(s) for the user and click on 💾 Save Permissions.
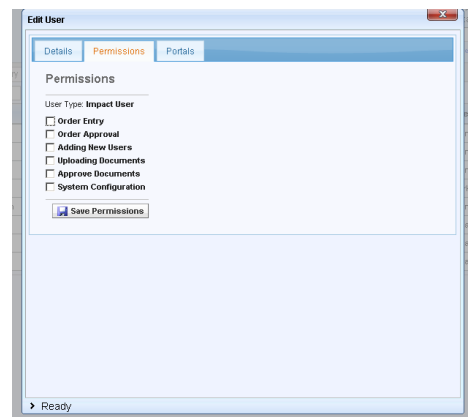
## Portals

The Portals tab will let the administrator grant permission to all Portals configured in Impact Online to the specific user. A ✓ green checkmark indicates permission granted, a white checkmark indicates permission denied.
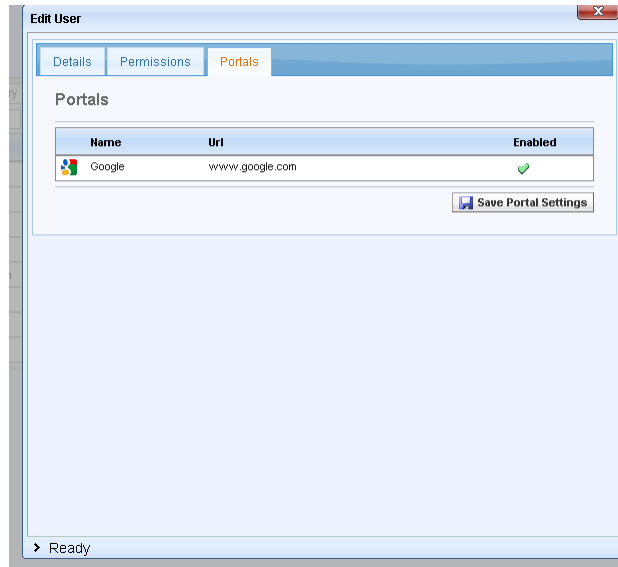


## Delete User

Clicking on the 🗑 Delete User icon, in front of a username on the main listing, will result in a prompt asking you to confirm you wish to permanently remove the highlighted user from the Impact Online system. Clicking on **Yes**, will remove the user.

# Other Documentation

Detailed instructions for Impact Online external users is provided in the Impact Online Version 3.1.5 External User's Manual and additional features for Internal users are discussed in the Impact Online Version 3.1.5 – User Manual Addendum for Internal Users.

# Support

Please contact USA Digital Solutions, Inc. at (602) 866-8199 x 2 or by email at Support@Digisolaz.com for support issues.