

CheetahDocs

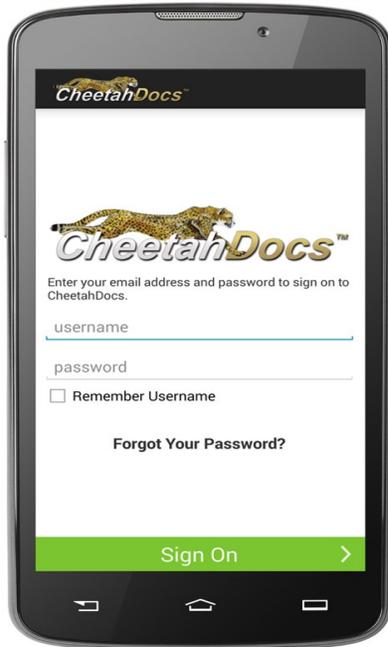
Mobile Application User Guide

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Logging In To CheetahDocs

To log into the CheetahDocs application on a supported mobile device, perform the following steps:

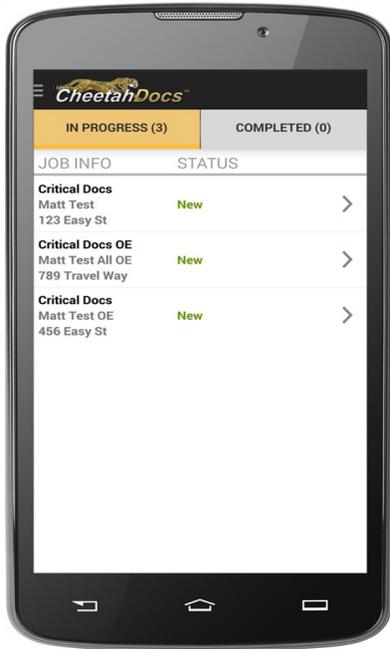


- 1 Open the CheetahDocs application. The login page appears.

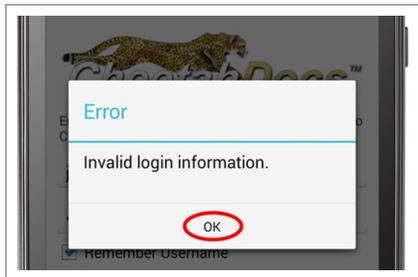


- 2 Type a valid email address into the username field (the username is always an email address that has been set up by a CheetahDocs Administrator).
- 3 (Optional) Select the "Remember Username" checkbox to enable CheetahDocs to store and display the email address in the username field upon subsequent visits.
- 4 Type a valid password into the password field (like the username, the password has already been set up by a CheetahDocs Administrator and has been provided).

Tap "Sign On" at the bottom of the page.



5 The Job Queue page appears upon successful login.



6 On the other hand, if an invalid username and/or password is entered, then an Error pop-up message appears.

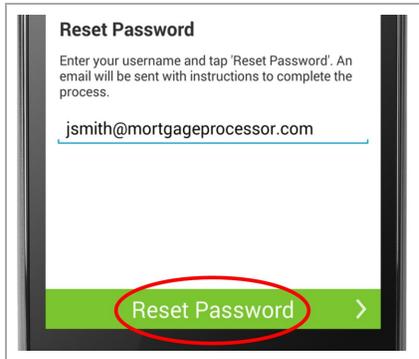
Tap OK and continue attempting login until successful.

Resetting Your Password

To reset a forgotten password in CheetahDocs, perform the following steps:

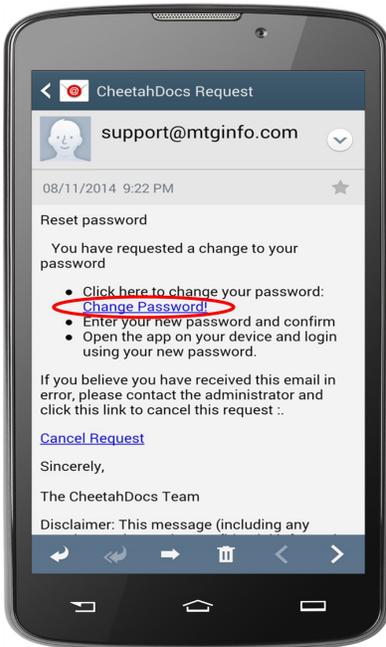


1 Tap "Forgot Your Password?" on the Login page.

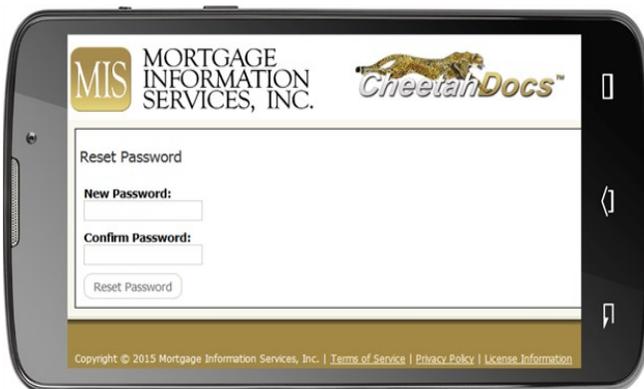


2 If the previous step is done with a valid email address already typed into the username field, then this email address will be pre-populated into the "Enter your username..." field on the Reset Password page that follows (otherwise, type a valid email address into this field).

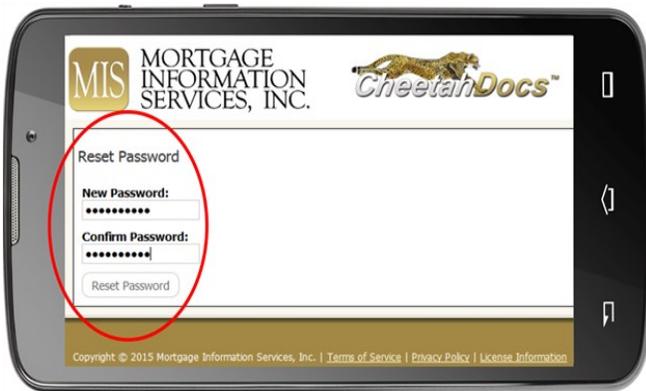
Tap "Reset Password" at the bottom of the page.



3 This sends a "CheetahDocs Request" email message to the specified email address Inbox shortly thereafter. Open the email once it is received. It contains a hyperlink to click in order to continue resetting the password.

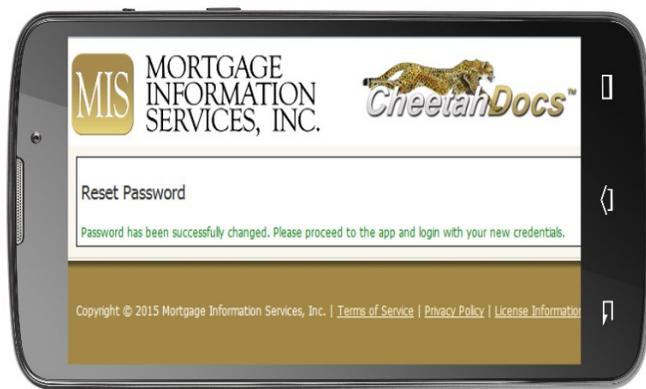


4 A separate Internet browser window opens and the CheetahDocs Reset Password web page appears.



- 5** Type the same, new valid password into both the "New Password:" and "Confirm Password:" fields.

Tap the Reset Password button.



- 6** If successful, the Reset Password web page refreshes and a message indicates the password has been reset.

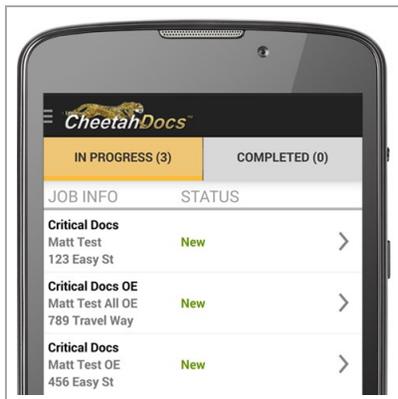
- 7** Close the Internet browser and return to the CheetahDocs application login page.

- 8** Repeat the [login steps](#).

The CheetahDocs Job Queue

This section briefly describes the CheetahDocs Job Queue, its screen layout and available functions.

About the Job Queue

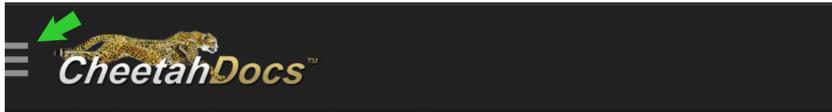


Once logged into the CheetahDocs application, the first page which appears is referred to as the Job Queue. A "job" in CheetahDocs is defined as a specific appointment during which signed and notarized borrower mortgage application documents need to be captured. This is an example of the Job Queue page.

Job Queue Layout and Functions

The Job Queue's layout consists of a header (which appears the same on every CheetahDocs application page) and a main portion of the page:

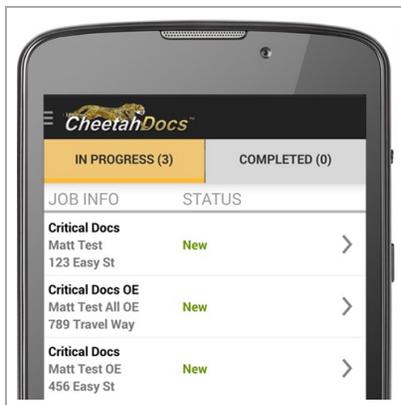
- The header contains the CheetahDocs application logo and, to the left of the logo, the Main Menu button (indicated by the green arrow below):



Refer to the [Main Menu](#) section for a description of all of the CheetahDocs Main Menu options.

- The main portion of the Job Queue page contains the two CheetahDocs job queues: "In Progress" and "Completed."

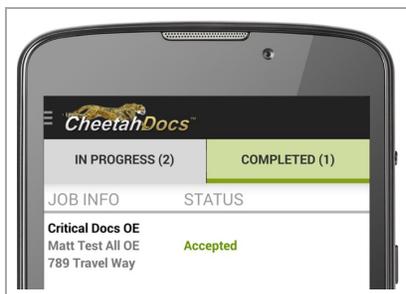
Each of the job queues contains a grid with two columns: "JOB INFO" AND "STATUS." The "JOB INFO" column contains the Job Name (in bold text) as well as the borrower's Name and the subject property's Street Address. The "STATUS" column contains one of the following values, depending on the queue. Here are descriptions of each of the job queues:



The "In Progress" job queue contains mortgage application document capture jobs that are either not yet started or partially-completed.

Possible "STATUS" values are:

- New - The job is new to the job queue and is not yet started
- Incomplete - The job has been started but additional documents/pages need to be captured and delivered
- Rejected - The job has been rejected based on quality review and needs to be fixed and reuploaded



The "Completed" job queue contains capture jobs that have already been uploaded and/or approved.

Possible "STATUS" values are:

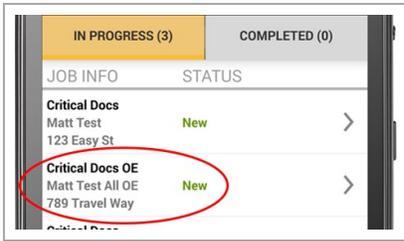
- Delivered Awaiting Review - The job has been uploaded to the secure central server and needs to be reviewed for quality
- Accepted - The job has been reviewed and completed

CheetahDocs Jobs

CheetahDocs Jobs are described in detail in this section.

Selecting a New Job from the Job Queue

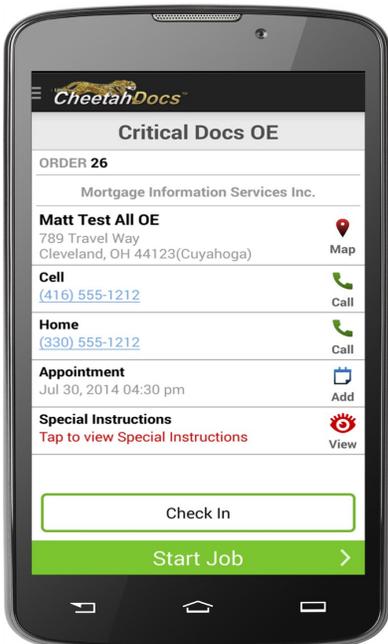
To begin working on a new ("STATUS" = New) job contained in the "In Progress" job queue, perform the following steps:



1 Tap the New job's row in the "In Progress" job queue.

2 The selected job's details page appears (see below for an image and description).

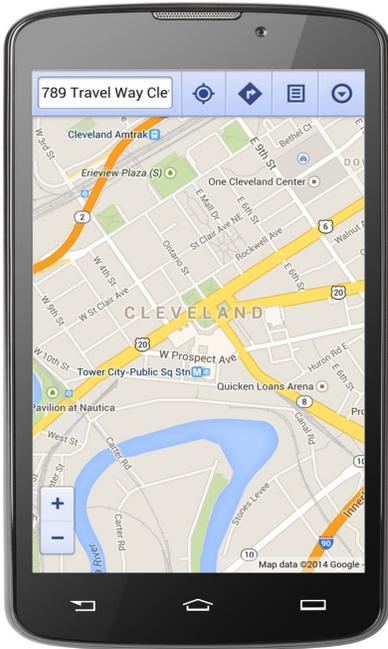
Job Details Page Layout and Functions



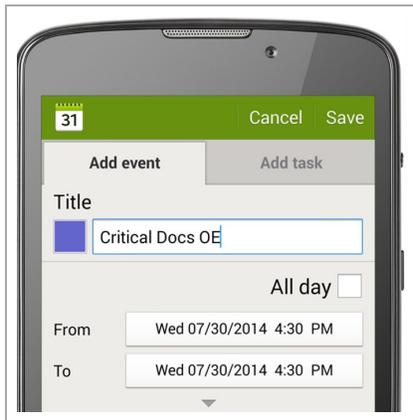
A specific mortgage application document capture job begins from its Job details page. The main portion of the Job details page consists of the following information and functions:

- Job Name (center-justified in bold text)
- Job Number - The job's system-generated unique identifier
- (Borrower) Name and (subject property) Address information - The Borrower's Name (in bold text), (subject property) Street Address, City, State, ZIP Code and County (in parentheses) along with a [Map button](#)
- (Borrower) Phone Number(s) - The Borrower's mobile, home and/or work telephone number(s) along with a Call button for each that dials the number using the mobile device's phone
- Appointment - The information about the mortgage application document collection appointment currently scheduled with the Borrower along with an [Add button](#)
- Special Instructions - Any notes or points of emphasis that need to be communicated in writing about the job (tap the [View button](#) to display the special instructions)

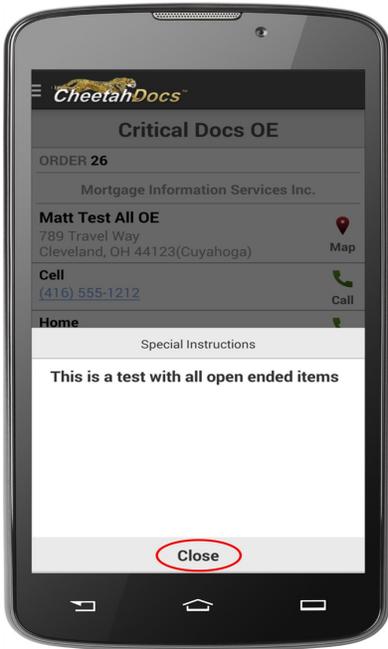
SPECIAL NOTES ABOUT SOME OF THE JOB DETAILS PAGE FUNCTIONS:



Tap the Map button to open a separate Internet browser window showing the subject property's GPS location on a map.



Tap the Add button in the Appointment function to create an event in the mobile device's calendar application that can be edited and saved.



Tap the View button in the Special Instructions function to display the special instructions.

Any Special Instructions attached to a job are EXTREMELY important and they MUST be viewed before starting a job. If the Special Instructions have not been viewed before tapping “Start Job,” then they appear onscreen at that moment.

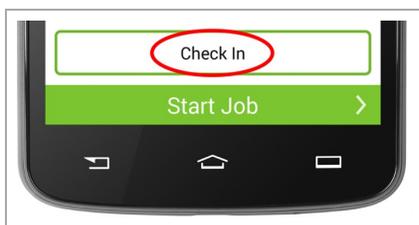
Tap Close to hide the Special Instructions and return to the Job details page.

Checking In and Beginning a Job

Using the Job details page to begin the capture job is a two-step process. The two steps are:

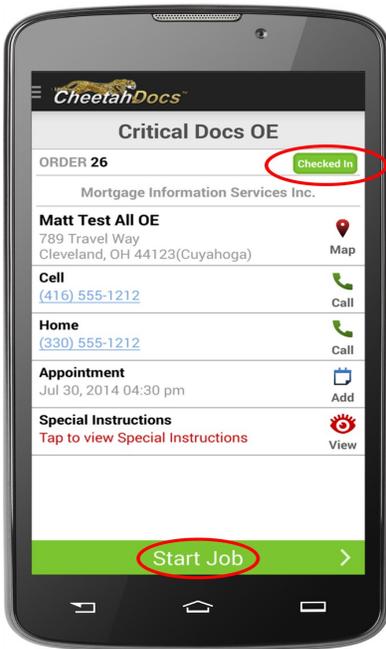
- "Checking in" to verify that the current location is the correct location of the appointment
- Starting the job

To check in on a job, perform the following steps:



- 1 Tap the "Check In" button near the bottom of the Job details page.

- 2 A green "Checked In" indicator appears in the upper right corner of the Job details page.

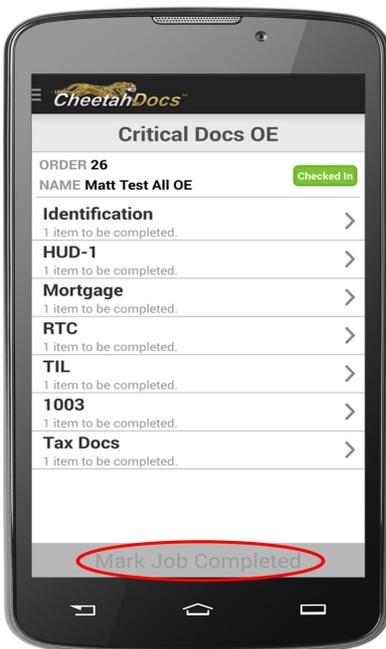


Doing this saves and transmits the mobile device's current GPS location to the secure central server. This current GPS location is automatically compared with the exact location of the job's scheduled appointment in order to confirm that the current location is correct. Some additional important checking-in procedures are:

- Location services must be enabled on the mobile device before checking in (so the device's current location AND time-of-day can be communicated to the central server)
- Check-in must be done upon arrival at the appointment location and immediately prior to entering the appointment facility ontime (do not check in any earlier or later than this)

Tap "Start Job" at the bottom of the page to begin the job.

Perform the following steps after tapping "Start Job:"



- 1 The documents list page for the selected job is displayed. The "Mark Job Completed" function at the bottom of the page is inactive until all job documents are captured and uploaded (or "delivered") to the secure central server.
- 2 Review the main portion of the page consisting of the following:
 - Job Name (center-justified in bold text)
 - Job Number - The job's system-generated unique identifier
 - Name - The Borrower's Name (in bold text)
 - The list of documents that comprise the job appears directly below the Borrower Name field. Each document's Title and Status is shown. If capture of a specific document in the list has not yet been started, then its Status (shown below the document's Title) indicates "(#) item to be completed."
- 3 Tap a document Title to proceed.

Capturing Document Page Images

To begin capturing a specific document in the list as part of completing the job, perform the following steps after tapping a document Title:



- 1 The selected document's page appears.

NOTE: The "Deliver and Continue" function at the bottom of the page is inactive until all document pages are captured.

- 2 Review the main portion of the document page which consists of the following information and functions:

- Job Name (center-justified in bold text)
- Job Number - The job's system-generated unique identifier
- (Borrower) Name - The Borrower's Name (in bold text)
- Document Title (center-justified in bold text)
- The list of individual pages that comprise the whole document appears directly below the Document Title field. Each page's Title is shown along with an image (camera) icon.

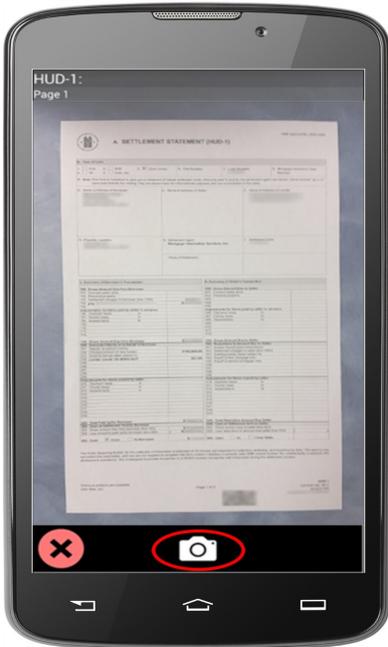
When using CheetahDocs to capture page images for a mortgage document, there are generally two possible situations:

- Documents having a variable number of pages from job to job
- Documents always having the same number of predefined pages

Specific procedures for both situations are described in the following sections.

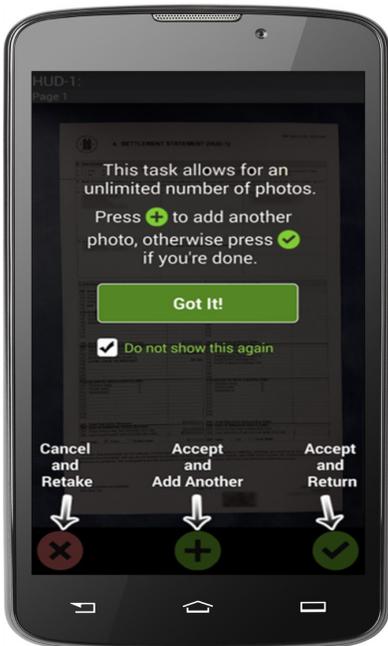
Image Capture Procedures - Variable-Page Documents

Most documents to be captured using CheetahDocs have a variable number of pages to capture as images. For these, beginning with the first page of the document, perform the following steps to capture all of the document's page images from the CheetahDocs document page:



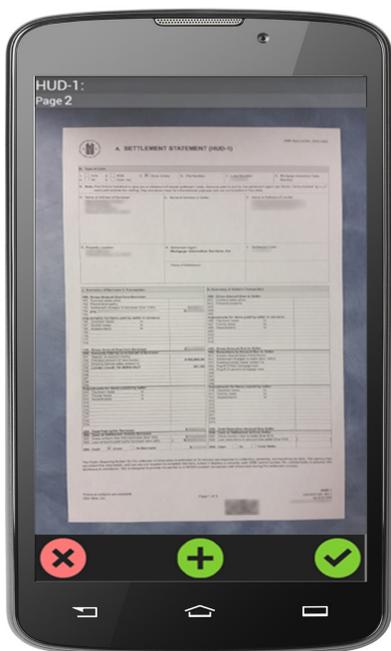
- 1 Focus the actual page in the device's camera viewfinder and tap the page's Title to begin capturing an image of that page. This activates the CheetahDocs camera function in "Preview" mode.

Tap the camera button to capture the image.



- 2 If this is the very first time the CheetahDocs camera function is being used to take a picture, then before the document image is presented onscreen, a "help overlay" screen appears describing the different functions available after taking a picture.

Tap the "Got It!" button when ready to resume taking pictures (before tapping the "Got It!" button, de-select the "Do not show this again" checkbox to avoid this overlay screen in the future).



- 3 The camera captures and displays the image of the document page.

NOTE: The document and page Title remain at the top left and the document page occupies most of the remainder of the screen. At the bottom, there is an accept-and-return (to the document page) button to the right, an accept-and-add-another-page button at center and a delete button to the left (to retake the image if needed, tap the delete button and repeat the above step).

- 4 Tap the accept-and-return button to save the page's image and return to the CheetahDocs document page.

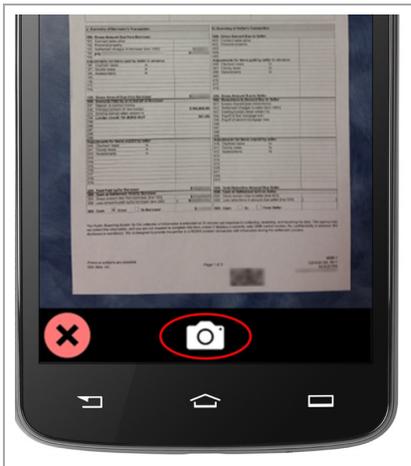
OR

Tap the accept-and-add-another-page button to save the page's image and automatically proceed to the camera's "Preview" mode for the document's next page.

- 5 Repeat the above steps as needed until all of the document's page images have been captured.

Image Capture Procedures - Predefined-Page Documents

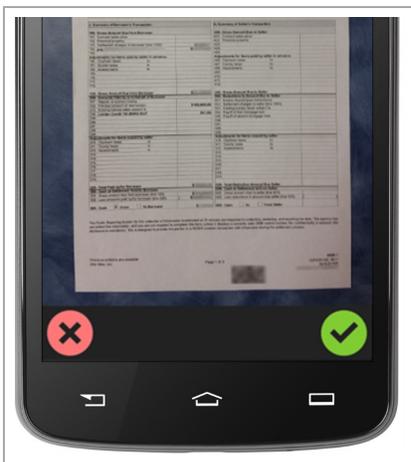
Some documents always have a predefined number of pages to capture as images. For these, beginning with the first page of the document to be imaged, perform the following steps to capture all of the document's page images from the CheetahDocs document page:



- 1 Focus the actual page in the device's camera viewfinder and tap the page's Title to begin capturing an image of that page. This activates the CheetahDocs camera function in "Preview" mode.

The document and page Title appears at the top left. The camera view occupies most of the remainder of the screen along with (at the bottom) a capture (camera) button at center and a delete button to the left.

Tap the camera button to capture the image.

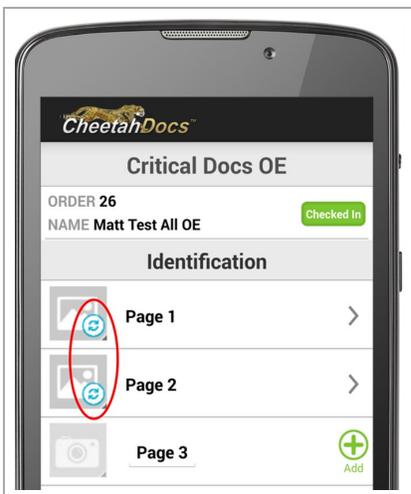


- 2 The camera captures and displays the image of the document page.

The document and page Title remain at the top left and the document page occupies most of the remainder of the screen. At the bottom, there is an accept button to the right and a delete button to the left (to retake the image if needed, tap the delete button and repeat the above step).

- 3 Tap the accept button to save the page's image and automatically proceed to the camera's "Preview" mode for the document's next page.

- 4 Repeat the above steps until all of the document's page images have been captured.



After capturing all a document's required page images, the document page may look something like this.

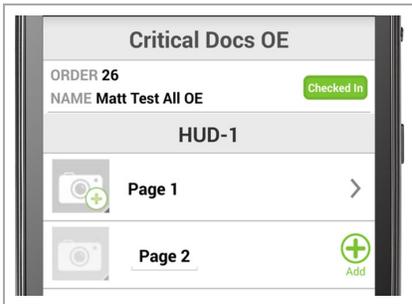
NOTE: The blue-and-white "retake" icon appears at the lower-right of the thumbnail for captured document pages. To retake the picture of any document page, simply tap the page Title again and repeat the picture-taking using the camera.

Finishing Document Page Image Capture and Uploading the Job

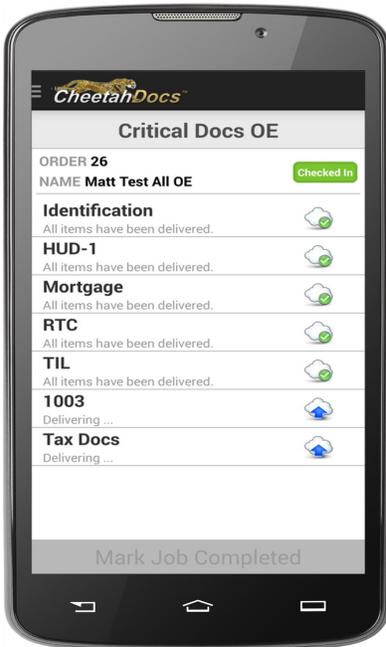
To complete all remaining document page image capture activities:



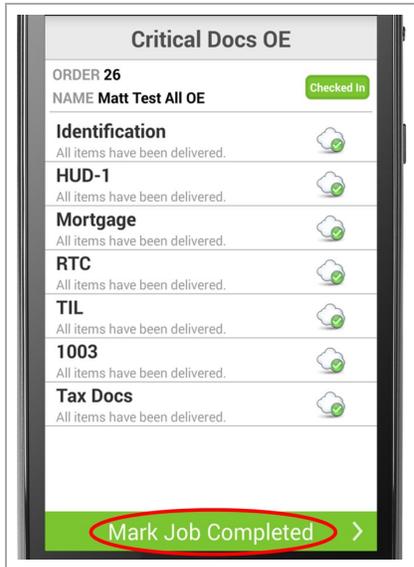
- 1 Once all pages of the current document have been captured, tap the "Deliver and Continue" button at the bottom of the document page.



- 2 The document page images are uploaded (or "delivered") to the secure central server while the next document's page appears.

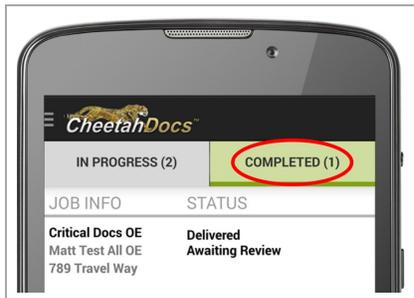


- 3 Repeat the process of selecting a page and taking its picture for all pages of all job documents from there. As the job's documents are captured and delivered, the Job details page may look like this, showing the status of the job's documents in terms of which ones have been completed and delivered and which ones are presently being uploaded (or are not yet started).

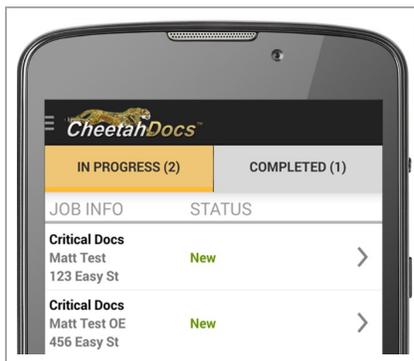


4 After all of the job's documents have been captured and delivered, review the Job details page.

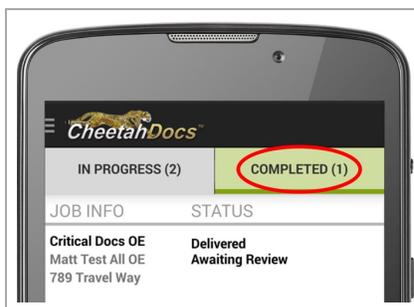
Tap "Mark Job Completed" to complete the job and return to the Job details page (doing this also automatically notifies Quality Assurance that the job is ready to be reviewed).



5 In the meantime, CheetahDocs moves the job into the "Completed" job queue while it awaits review.



To move on to the next job, or to return to the job queues for any reason, tap Assignments in the [Main Menu](#). The Job Queue page appears with the "In Progress" job queue pre-selected.

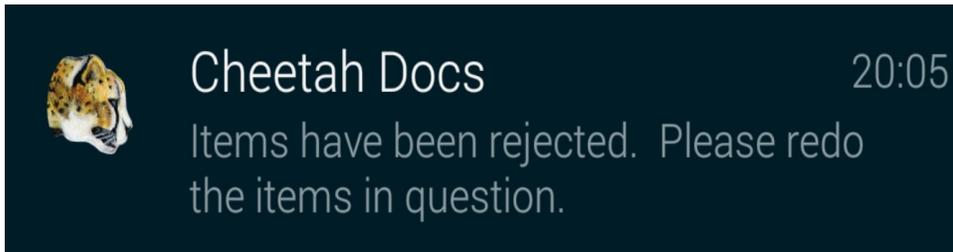


Alternatively, tap the "Completed" job queue to view the completed job(s) by Name and Status. Jobs that have just been delivered (uploaded) to the secure central server have a Status of "Delivered Awaiting Review."

Quality Review of Uploaded Jobs and Handling Rejections

The Completed job queue is monitored regularly by the Quality Assurance team. When a delivered job appears in this queue, the following happens:

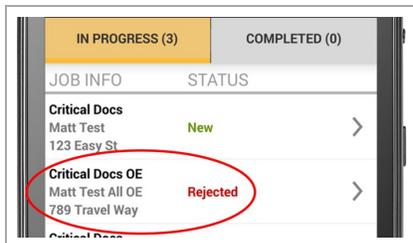
- 1 A Quality Assurance team member will open it and review all of its document page images to ensure they all are the correct page and are legible.
- 2 Quality Assurance either accepts (by marking as "Accepted") or rejects (by marking as "Rejected") each document page image. Accepted images do not need any further revision (nor can any accepted image be re-uploaded from CheetahDocs). However, any rejected images are returned to the CheetahDocs application for retake. When this happens, a notification may appear on the device. It may look something like this:



To handle job rejections, perform the following steps:

- 1 If already logged into CheetahDocs when this notification appears, then simply tap the Assignments [Main Menu](#) option to refresh the work queues. Otherwise, open CheetahDocs and log in to begin fixing the rejections.

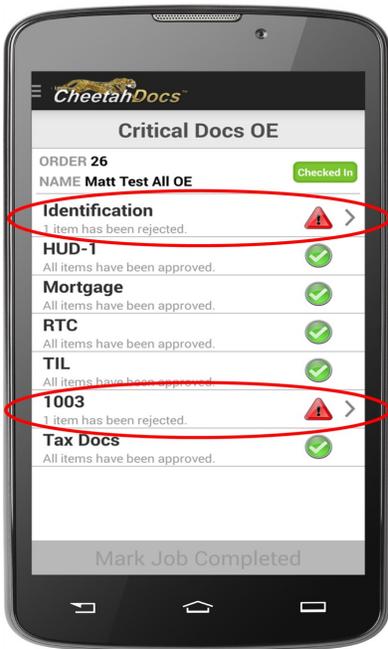
NOTE: Tapping the rejection notification message should also open CheetahDocs to the Login page.



- 2 When a job is rejected, it appears in the "In Progress" job queue with a Status of "Rejected." Tap the "Rejected" job queue item to continue.



- 3 The Job Details page appears. Tap "Resume Job" to begin fixing the job.

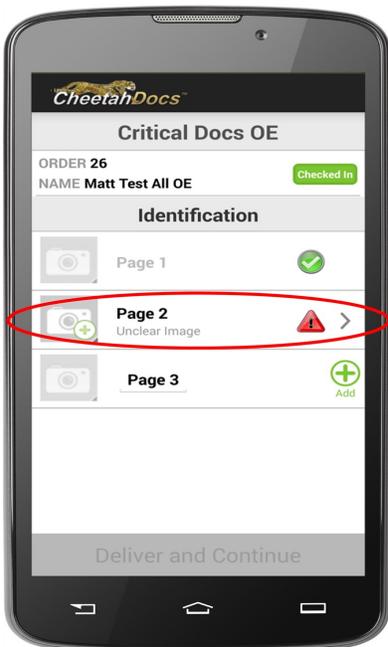


4 The documents list page appears.

Any rejected job documents require attention. Documents having one or more of their pages rejected by Quality Assurance are indicated by an alert icon - an exclamation point surrounded by a red triangle. Any other documents have been accepted (where the icon is a checkmark surrounded by a green circle) and do not require any further action. In the above example, two of the job's documents (Identification and 1003) have been rejected. Beneath each rejected document's Title, the number of items (pages) that need their pictures retaken is indicated in a status message ("n item(s) has (have) been rejected.").

Tap the first document with rejections in the list.

5 Its document page appears.



Individual rejected pages are shown with the same alert icon from the documents list (previous) page. Also, beneath the rejected page's Title there is a "reason code" entered by Quality Assurance which briefly explains the reason why the page image was rejected.

Possible reasons are:

- Unclear Image
- Wrong Page
- Missing Signature/Date
- Specific Color Ink Required (i.e. black or blue)
- Missing Notary Stamp

Tap the rejected page to activate the CheetahDocs camera function and retake the page's picture. Once the new captured image of the page is acceptable, tap the "Accept and Return" button in the camera function.



6 The document page reappears.

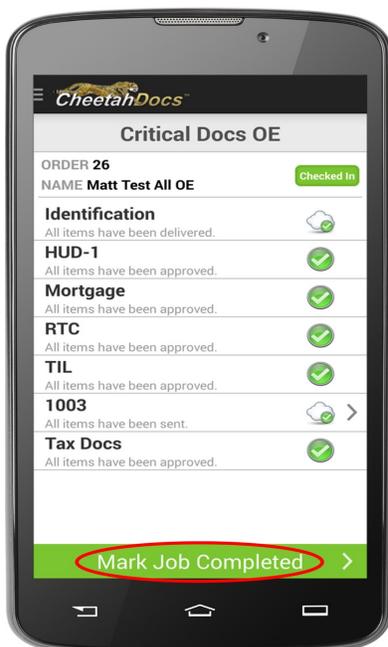
NOTE: After the retake, on the document page the alert icon has disappeared and has been replaced with the re-take icon next to the specific page just re-taken. Re-take the image again if necessary before delivering the corrected document page image(s).

Retake the picture(s) of any other document page that has been rejected by Quality Assurance and tap "Deliver and Continue."



7 If another of the job's documents has rejected pages, then its document page appears next.

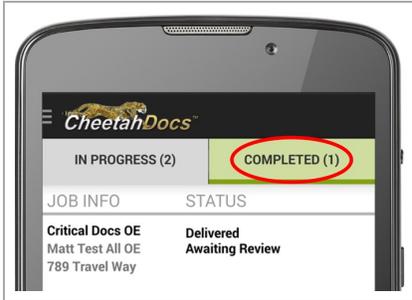
Repeat the steps of selecting the rejected page, retaking its picture and tapping "Deliver and Continue."



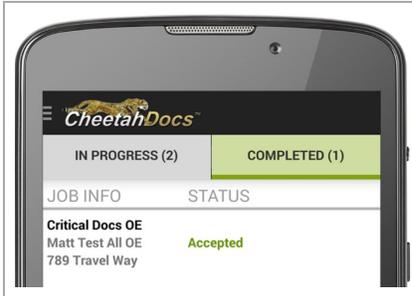
8 After all required document pages have been retaken successfully, the documents list page reappears.

All retaken document page images are automatically reuploaded to the secure central server. From the above example, the "All items have been (delivered or sent)." status message beneath the Identification and 1003 documents indicates this.

Tap "Mark Job Completed."



- 9 The Completed job queue page appears and once again the job is here with a Status of "Delivered Awaiting Review."

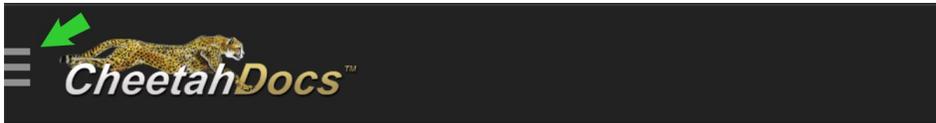


From there, the Quality Assurance team will review all of the job's previously-rejected document page images. Presuming they are all acceptable, Quality Assurance accepts them and the job's Status in the Completed queue is now "Accepted."

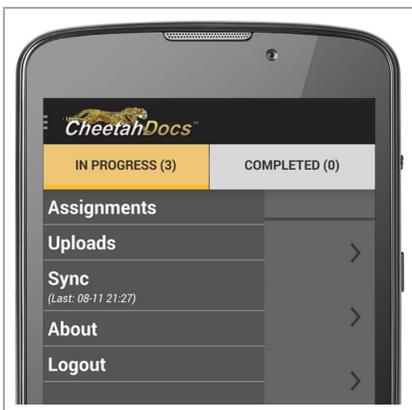
NOTE: Accepted jobs are removed from the Completed job queue after 24 hours.

The CheetahDocs Main Menu

The CheetahDocs Main Menu button is located to the left of the CheetahDocs logo in the header section of the application (indicated by the green arrow below):

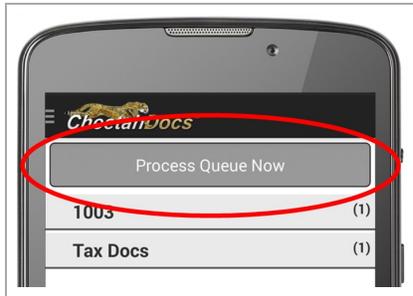


Tap the Main Menu button to display the Main Menu onscreen.



The available Main Menu options are (tap each option to perform the operation described):

- Assignments - Opens/refreshes the Job Queue page
- [Uploads](#) (click hyperlink or see below for more information)
- Sync - Refreshes the "In Progress" and "Completed" job queues on the Job Queue page to reflect progress since the previous synchronization (the date/time of the most recent synchronization is shown in parentheses below the Sync option)
- About - Shows the installed version of the CheetahDocs application and identifies the mobile device currently in use
- Logout - Logs the user out of CheetahDocs and displays the login page



Uploads

The Uploads Main Menu option opens the Uploads page which displays the titles and page image counts (in parentheses) of any captured documents to be uploaded to the secure central server.

Tap the "Process Queue Now" button to upload any captured documents listed here.



If no uploads are currently in progress, then the Uploads page indicates this.

When the Main Menu is displayed, tap anywhere off the menu to close the Main Menu without selecting any of the options.