

OSI_Bisys TotalPlus Installation

Installation:

Downloadable files from the FTP Site:

ftp://ftp:delmarcc.com

user name: u36679490-TPlusPRO **(for Professional Encompass Users)**

user name: u36679490-TPlusCEBE **(for Custom or Bankers Encompass Users)**

password: 1234567

Exportit50EInstall.exe –

- [] Save to a Temp folder and run this install on the server or on each workstation that will be using the interface. The install will create a \DMCC\Exportit50e folder.

CreateConfigFile.exe –

- [] Save and run this file from the \DMCC\Exportit50e folder.

[If the Login to Encompass gives you an error when you click on the settings button, do the following.]

Exportit50e.exe.config –

- [] Save into the \DMCC\Exportit50e folder.

Interface MGrTotalPlus STD Layout and Requirements.xls –

This is the OSI data dictionary including the Encompass fields.

[Encompass Professional Users Only. If you are using Encompass Custom or Bankers version skip to the next section]

TotalPlus Professional Encompass.esf (Export-its Totalplus mapping file)

- [] Save into the \DMCC\Exportit50e folder.

TotalPlus Professional.BAS – (Export-its VB conditional statement formulas)

- [] Save into the \DMCC\Exportit50e folder.

Export-it will add an Icon to the Desktop. Click on the icon and open the Export-it program.

- [] Click on FILE and select the TotalPlus Professional Encompass.esf.
 - [] Enter you Encompass Login information into the box in the lower left side of the window.
 - [] Click on the Setup button.
 - [] On the Source Folder Tab select the folder(s) where you loan files reside.
 - [] Click on the Output Format Tab.
 - [] On the bottom of the window in the Run Script line click on the Browse button.
 - [] Select the \DMCC\Exportit50E\TotalPlus Professional.Bas file.
 - [] Click on the Destination Tab.
 - [] On the bottom of the window in the File Name line click on the Browse button and select the folder where the OSI interface will be looking for the source file.
 - [] Click on Save.
- [] On the Main menu click on the “Run Quick Search When Loading” checkbox.
- [] Click on the Exit button. The next time you open the program the Quick search window will open.

TotalPlus.HTM – (new custom Encompass screen)

- [] Save into the \Program Files\Encompass\Documents\Forms folder on the Server and all workstations.

- [] In order to add the new screen the menu file needs to be updated. This file may be updated by Ellie Mae when they update the program. If this happens the menu file will need to be restored and the screen will once again appear. The screen and data will be lost, only the screen name on the menu file.
- [] Please email the following file to mike@delmarcc.com and we will add the new screen name. Then when it is emailed back just save it to the following folder and overwrite the existing file. Be sure to first backup the original file.

\program files\encompass\documents\EMInputFormList.XML

[Encompass Custom or Bankers Users Only]

TotalPlus CEBE Encompass.esf (Export-its Totalplus mapping file)

- [] Save into the \DMCC\Exportit50e folder.

TotalPlus CEBE.BAS – (Export-its VB conditional statement formulas)

- [] Save into the \DMCC\Exportit50e folder.

TotalPlus_CEBE.empkg – (new custom Encompass screen and custom fields)

- [] Save into the \DMCC\Exportit50e folder.
- [] Open the Encompass Input Form Builder.
- [] Click on TOOLS and select Package Import Wizard.
- [] Browse to the \DMCC\Exportit50E folder and select the TotalPlus_CEBE.empkg.

Export-it will add an Icon to the Desktop. Click on the icon and open the Export-it program.

- [] Click on FILE and select the TotalPlus CEBE Encompass.esf.

- [] Enter you Encompass Login information into the box in the lower left side of the window.
- [] Click on the Setup button.
- [] On the Source Folder Tab select the folder(s) where you loan files reside.
- [] Click on the Output Format Tab.
- [] On the bottom of the window in the Run Script line click on the Browse button.
- [] Select the \DMCC\Exportit50E\TotalPlus_CEBE.Bas file.
- [] Click on the Destination Tab.
- [] On the bottom of the window in the File Name line click on the Browse button and select the folder where the OSI interface will be looking for the source file.
- [] Click on Save.

- [] On the Main menu click on the “Run Quick Search When Loading” checkbox.

- [] Click on the Exit button. The next time you open the program the Quick search window will open.

Daily Operation:

Open Export-it

Enter one of the following to search for:

Loan Number

First Name

Last Name

Origination From / To

Lender Name

Select the Match Type

Click on the OK Button

When the list of matches show up, select the file(s) that you would like to process.

Export Button.

If you get a message "A file named: ... already exists. Click on the Yes Button.

Export-it is not complete and the TotalPlus file is now stored in the target folder.

Open and run the OSI interface.