FINASTRA

LaserPro Conductor

User Guide

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About This Guide

Purpose

LaserPro Conductor is a document management product that enables users to:

- Manage loan document packages sent from LaserPro
- Review and edit individual documents in a document package
- Add and edit signers
- Reorder documents based on your institution's requirements

The LaserPro Conductor User Guide introduces the LaserPro Conductor product and contains basic information on how to manage loan document packages. The User Guide is designed as both a learning aid and a reference guide for the LaserPro Conductor product.

Use this guide with version 22.2.0 or greater of the LaserPro software and our other related products.

Audience

The *LaserPro Conductor User Guide* is written for financial institutions using LaserPro Conductor in conjunction with LaserPro. Users of this guide need a solid working knowledge of, and experience with:

- Basic to intermediate computer functions, such as mouse and keyboard navigation and printer setup
- Microsoft Windows
- Setting up lending software for your institution
- Familiarity with compliance issues

Chapter Contents

Chapter	Description
Getting Started	Provides steps to register for LaserPro Conductor through Total Lending Home.
LaserPro Conductor Screens	Provides a description of the screens in LaserPro Conductor, along with the functionality of the fields, buttons, and drop-down available on the LaserPro Conductor screens.
Managing Document Packages	Processes on how to add, remove, and rearrange document. This chapter also outlines how to add and reply to comments on documents in the document package.
Managing Signers	Processes to add, delete, and reorganize signers.

LaserPro Conductor Contact Information

Type	Location	Contact
Technical and product usage information about software operation	Finastra Customer Success Community and Online Case Management	https://support.finastra.com/ Phone: 800-274-7287
See current information about software updates	Finastra Customer Success Community	https://support.finastra.com/
Confirm license information or request information about additional products or modules	Sales	800-274-7280, extension 0 (Ask operator for sales representative for your state)
View online information on products, company	Finastra website	http://www.finastra.com

Getting Started

About LaserPro Conductor

LaserPro Conductor is a Document Management tool that allows your Document Specialists to finalize loan document packages before printing documents for signature or sending the documents to your eSign vendor for an eSignature. LaserPro Conductor allows you to review loan documents, edit signers, and add and reorder a document package imported from LaserPro. By providing a user interface for managing document packages, the review process becomes streamlined and more efficient.

LaserPro Conductor is a "Software as a Service" (SaaS) solution that allows Finastra to provide continuous delivery without costly implementation. More importantly, it allows Finastra to provide timely enhancements based on user feedback.

Registering for LaserPro Conductor

Microsoft Azure Account

Your organization must have a Microsoft Azure account. Your Azure Active Directory provides single sign-on access and identity credentials for your LaserPro Conductor users.

For more information on establishing or maintaining an Azure account, see Knowledge Article 000072388 - Total Lending: Best Practices for Setup of Azure Account & Azure Active Directory in the Finastra Customer Success Community

Finastra Total Lending Account

Your organization must have a Finastra Total-Lending account. Total-Lending is a cloud-based platform that provides a common infrastructure for integration of Finastra lending products, third-party solutions, and Azure Active Directory.

For more information about registering for a Total Lending account, see Knowledge Article 000054616 – Register for a Total Lending account and services.

IMPORTANT! You are required to select the Digital Signing Integration checkbox on the Registration screen to register LaserPro Conductor.

OpenPath Installed and the TotalLendingAccess Gateway Setup

Your organization must have OpenPath 21.4.10 or greater installed and have obtained a certificate for the TotalLendingAccessGateway.

OpenPath is required for LaserPro upload to LaserPro Conductor. You can download the OpenPath installation program and the OpenPath TotalLendingAccess Gateway Guide from Support Center, under Lending & Compliance > LaserPro > LaserPro > Software Downloads and click on OpenPath.

Configuration Portal Vendor and User Set Up

After registering your Total Lending account, you will need to connect Digital Signing with your institution's eSign Vendor account. After connecting to the vendor account, you can set up user access to LaserPro Conductor either individually or grant permission for your entire organization. You can start using LaserPro Conductor once your eSign vendor and users are set up. See the Total Lending Digital Signing Integration Setup Guide in Support Center for more information.

1. Select one of the following sites:
   - To perform user acceptance testing (UAT), use the LaserPro Conductor test site: https://configuration.test.total-lending.com.
   - For the live production environment use the LaserPro Conductor production site: https://configuration.total-lending.com.
2. If prompted, select the Consent on behalf of my organization checkbox and click **Accept**.
3. Select the **Digital Signing Integration** checkbox.
4. Click on the **Vendors** icon on the left-hand side of the screen.
5. Click on **Vendor Configuration**.
6. Select **Digital Signing** from the **Business Domain** drop-down.
7. Allow user access to your eSign vendor using one of the following:
   - Consent to your eSign vendor – Use this button to set up users individually.
   - Admin Consent to your eSign vendor – Use this button to set up all users in the organization.
8. Sign into the eSign vendor's site and complete the vendor registration process. The new profile will appear in the Profiles section of the Vendor Configuration screen after the registration is complete.

   Note: Your institution needs to set up an account with your eSign vendor if your institution does not have a current account with the vendor.

You can now access LaserPro Conductor using the following link: https://conductor.total-lending.com/

Configuration Portal Roles and Permissions

Once you have configured your vendors and users, you can tailor your users' experience by assigning roles and permissions. See the Total Lending Platform Quick Reference Configuration Portal Roles in the Finastra Success Community by following these steps:

1. Log in to the Finastra Success Community website.
2. Click the Solutions tab.
3. Under Lending & Compliance Americas, select LaserPro.
4. Select LaserPro Conductor.
5. Click the Product Documentation link.

LaserPro Conductor Screens

About the LaserPro Conductor Screens

LaserPro Conductor has three screens you use during the document review process, the Dashboard screen, the Document Comparison screen, and the Document Editor screen. The Dashboard is what you see when first opening LaserPro Conductor. The Dashboard displays a list of and provides access to the document packages that need to be processed. The Document Editor screen displays after you select a document package to review. You can edit the document packages from the Document Editor screen.

Dashboard

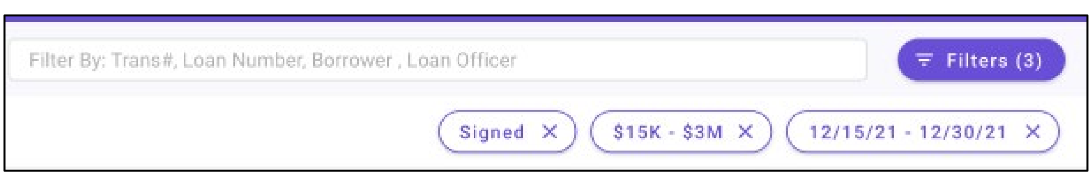
The Dashboard has the help menu, a list of document packages, and search functions. My Queue is where you can see what document packages need to be reviewed and sent for eSignature, the status, and the person assigned the document package.

The following menus are available in the upper right-hand corner of the Dashboard screen:

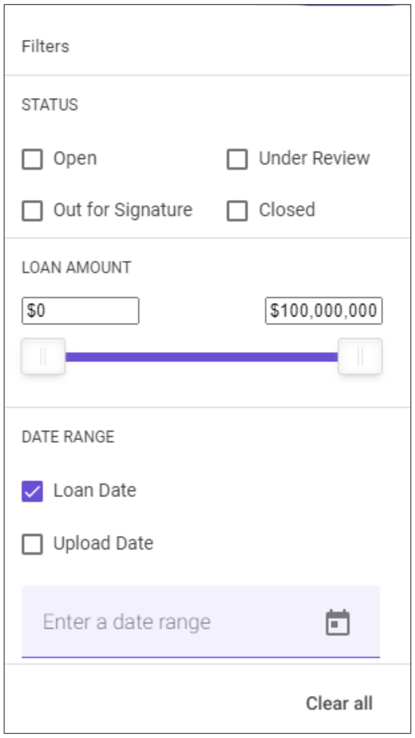
Icon	Name	Description
	Help	The Help button allows you to easily access support information for LaserPro Conductor. The How Can I Help? menu selections are: • **Release Notes**: Selecting Release Notes opens a pop-up window with a list of all published release notes. To open a PDF version of the LaserPro Conductor release notes, click the ellipses next to the release notes you wish to view and select **View**. The release notes will open in a separate tab in your browser. • **Documentation**: Link to user documentation to support LaserPro Conductor. • **About** – Displays the Finastra and PDFTron disclaimers.
	User	Clicking the user button displays your name, email address, and the Logout button in a pop-up window.

Search and Filter

You can search for specific document packages on the Dashboard. The Filter By field is in the upper right-hand corner of My Queue and lets you enter specific search parameters (e.g., transaction number, loan number, etc.). Search results display in My Queue as you type, allowing you to search using partial information.



You can sort document packages using the **Filters** button. Clicking the **Filters** button opens a pop-up window where you can sort the **Status**, **Loan Amount**, and/or **Date Range** columns to display document packages. The filters you select appear under the **Filter By** field. Click the **X** next to the filter or the **Clear all** button on the Filters pop-up window to remove filters.



My Queue

The columns in My Queue display information unique to the document packages. Some of the information in the document package is imported from LaserPro and is not editable, such as Loan Number and Trans #. You can access the document packages by clicking the link in the Trans # column. You can sort the items in the queue in ascending or descending order by clicking the arrow next to the column name.

The **Actions** button is disabled until checkboxes are selected. Once activated, you can update the Status, assign the selected packages to a specific user, and delete the selected document packages.

Column name	Description
Check boxes	Select multiple document packages at the same time.
Trans #	The LaserPro transaction number of the document package and a link to the document package.
Loan Number	Loan number assigned by your institution in LaserPro.
Borrower	Name of the primary borrower as captured by LaserPro. Additional borrowers are only visible when you access the document.

Column name	Description
Loan $	Amount of the loan as captured in LaserPro.
Loan Date	The date of the loan as defined by LaserPro
Loan Officer	Name of the loan officer as captured by LaserPro.
Status	Document Package statuses include: • Open – document package is ready to assign to a document specialist. • Under Review – the package is assigned to a document specialist and the review is in progress. • Out For Signature – the review is complete, and the document package was sent to the eSign vendor. • Closed – Signatures are complete, or no further action is required.
Assignee	User assigned to the package.
Upload Date	Date the document package is received from LaserPro.

Document Comparison

Click the Document Comparison button on the Dashboard to open the Document Comparison tool. The Document Comparison tool allows you to view two documents, typically an original and an updated version, to compare the documents for discrepancies and to verify the changes. Documents must be in PDF format.

Buttons and Icons	Description
Select Document (One and Two)	Select the documents you want to compare. The documents are uploaded from your desktop.
Compare Documents	Slide to compare the two documents. Differences are highlighted and displayed in the Comments panel.
Zoom	Zoom in and out. Select or enter set values, fit to page, fit to width, and switch to marquee view.
	Pan scrolling.
	Select content in the document. Allows you to edit content in the documents and add comments to the selection. Changes are automatically saved.
Search	Search for content in both documents. Search results are highlighted and listed in the right-hand panel.

Buttons and Icons	Description
Comments	List of the text differences between the two documents.

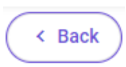
Document Editor

After you select the document package you need to review, the Document Editor screen appears. The Document Editor screen displays the first document in the package. Documents appear in the order they are imported from LaserPro.

The Document Editor screen has three sections, the Toolbar, Document View, and drop-down menus.

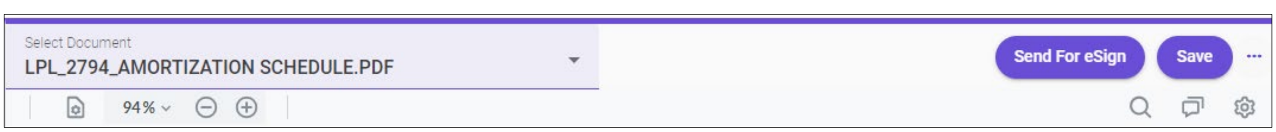
Toolbar

The Toolbar contains the following buttons and icons:

Buttons and Icons	Description
Back 	Returns you to the Dashboard screen.
Panel view 	Displays thumbnails of the documents in the package and a page view of the selected document.
Grid View 	Shows the documents in a grid view. You can re-order, add, delete, and exclude documents for eSign in grid view.

Document View

In the Document Editor screen, you can control how the document is displayed, search, print, download, and add comments. The Document View shows the currently selected document, not the entire package.



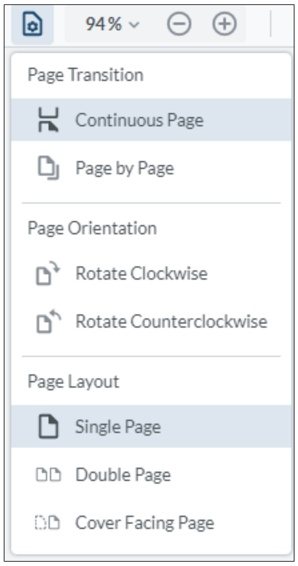
The following controls are available in Document View:

Function	Description
Select Document	Select a document to display in the viewer. You can also select a document using the thumbnails on the left-hand side of the screen.
View Controls	Change how the document displays.

Function	Description
Zoom	Zoom in and out. Select or enter set values, fit to page, fit to width, and switch to marquee view.
Send For eSign	Send the loan documents to your eSign vendor. ***Note:*** If you are using LaserPro Conductor for eSign, you need to configure your eSign vendor in General System Setup. See the General System Setup guide in the Finastra Customer Success Community for more information.
Save	Save changes you make to the document package. The Save button is only enabled after you make changes to the document package.
Ellipses	Click the ellipses to select one of the following: **Download Package** – Download the document package. **Print Package** – Print the document package. A window opens asking you want to include non-eSign documents. **Publish Package** - If your organization has opted to integrate with our open API eSignable Document Packages select this option to send the package to your designated Third party system. This is disabled by default.
Search	Search in the selected document. You can filter the search results by selecting the Case sensitive or the Whole word checkbox. The results are highlighted, and the page number displayed.
Comments	Search the comments added to the document. This only searches the document displayed, not the entire package.
Menu	Select to display the document in full screen, print, download, and switch between dark and light mode.

View Controls

The View Controls drop-down, shown below, allows you to choose how the document is displayed and change the scroll settings.



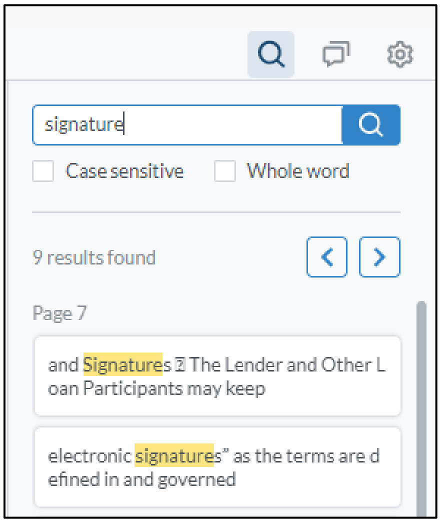
View Controls Options Description

Menu	Option	Description
Page Transition	**Continuous**	Continuously scroll through the document package
	Page by Page	Scrolling takes you to the next page.
Page Orientation	**Rotate Clockwise** **Rotate Counterclockwise**	Rotate the document in view.
Page Layout	**Single Page**	Displays one page in the Document View section.
	Double Page	Displays two pages in the Document View section.
	Cover Facing Page	The cover is one single page/single sheet, and page one of the document package is on the right-hand side.

Search

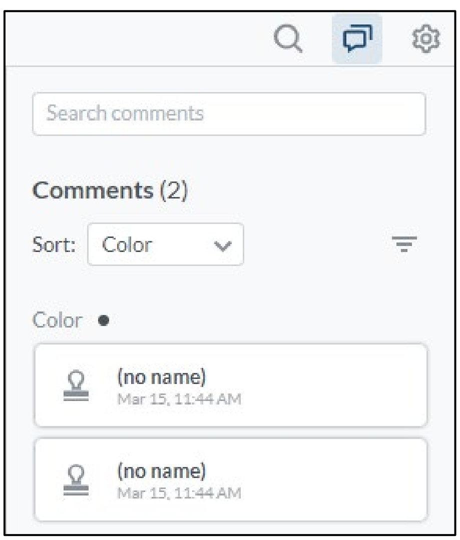
You can search for key terms in the document and filter the search results by selecting the **Case sensitive** or the **Whole word** checkbox. The highlighted results with the page number appear below the **Search** field. You can use the arrows to navigate to the page with the search term.

Note: You can only search the currently displayed document, not the entire package.



Comment Search

You can search for comments in the document. Selecting the comment icon opens a panel displaying comments added at the document level.



Click **Sort** and choose one of the following options to filter and sort the comments:

Option	Description
Position	Default selection. Location of the comment on the document currently displayed.

Option	Description
Created Date	Date the comment was added to the document.
Modified Date	Date the comment was edited or a response was received.
Status	Statuses of the comments include: • **Accepted** • **Rejected** • **Cancelled** • **Completed** • **None (default)** • **Marked** • **Unmarked** Comments appear in alphabetical order based on the current status.
Author	The person that added the comment.
Type	Indicates the type of comment using a comment bubble (added comment) or stamp (signature) icons.
Color	Colors determined by your financial institution.

Thumbnail Panel

The Thumbnail Panel on the left side of the Document Editor screen displays the individual documents in the document package in the order they were received from LaserPro.

You can manage the documents in the package using the controls available in the Thumbnail Panel.

Option	Description
Add Documents	Clicking the Add Documents button opens Windows File Explorer. Select a file from your computer and click Open to add a document to the package. Files must be in PDF format.
Ellipses	Opens a drop-down menu with the following selections: • **Delete** – remove a file form the document package • **Exclude in eSign** – document will not be sent with the eSign package but remains in the document package in LaserPro Conductor • **Convert to Docx** – converts the PDF file into a Word .dotx file for editing • **Enable Edit** – Edit the document in the Document View section of the Document Editor screen.

Your Tools

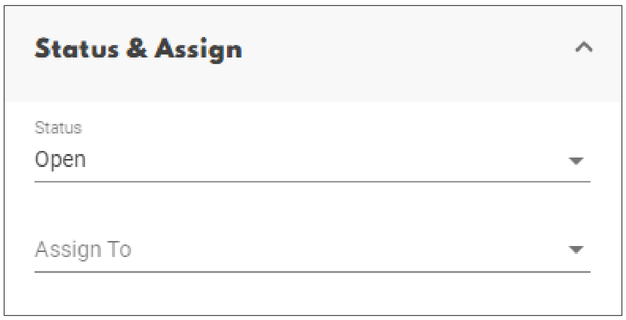
Your Tools contains the menus and tools used during the document editing and review processes.

Packaging

The Packaging tab includes the tools used when editing a document package.

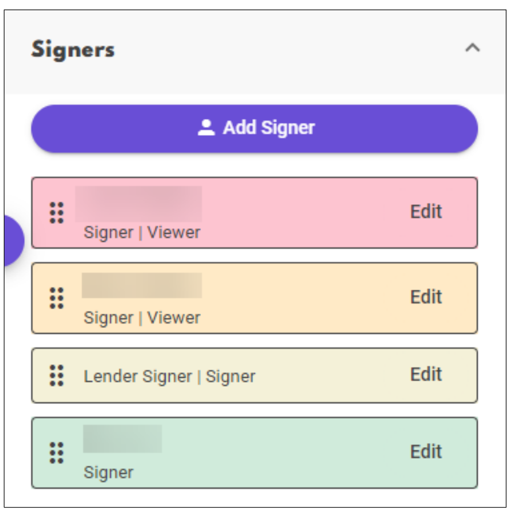
Status & Assign

The **Status & Assign** menu allows you to change the status (**Open**, **Under Review**, **Out For Signature**, **Closed**) and assign the document package to another user.



Signers

The **Signers** menu allows you to add, edit, and reorder signers. See the Managing Signers section for steps.



Envelope Editor

The Envelope Editor only visible when DocuSign is your eSign vendor. LaserPro imports the information in the Envelope Editor based on the settings designated in General System Setup. See the General System Setup Guide in the Finastra Customer Success Community for more information about DocuSign setup.

Field	Description
Template Name	Name of the template as defined by your DocuSign account.

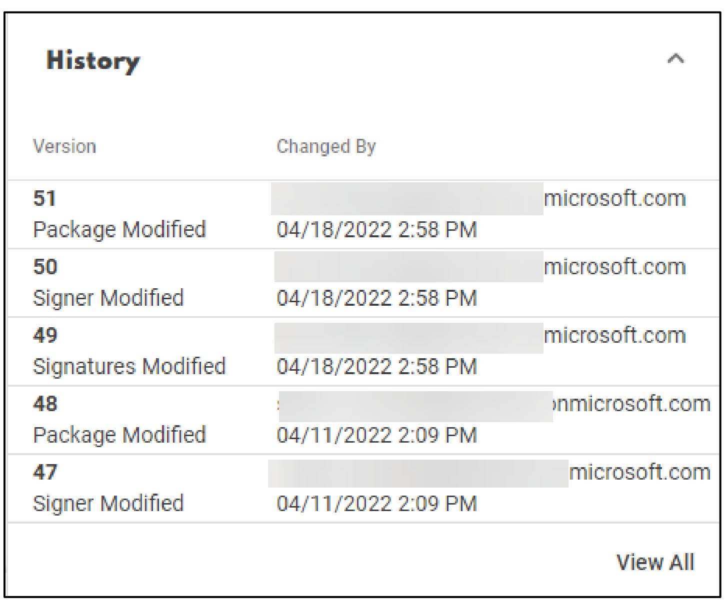
Field	Description
Send on Behalf of	Select the email address of the person sending the document package on behalf of your financial institution (e.g., the associated loan officer)
Package Manager Email	Enter the email address of the lender required to sign the document package.

Comments

The **Comments** menu allows you to manage the comments made at the package level. The Comments menu does not display comments on individual documents. You can view the comments and replies, add and delete comments, and reply to other user comments.

History

The **History** menu allows you to view the revisions of the document package. The information displayed in the menu on the Document Editor screen includes the version number, type of change, the user who made the change, and the date and time of the change. Click **View All** to open a pop-up window with more information on the historical changes. The pop-up window displays all the change history the drop-down menu displays with the addition of the date the change was made. You can sort the information by using the arrows next to the column names.



Checklists

The Checklists tab includes the checklists created by your LaserPro Conductor Administrator. Checklists are open ended and can be created for specific roles and duties such as quality control and loan officer checklists.

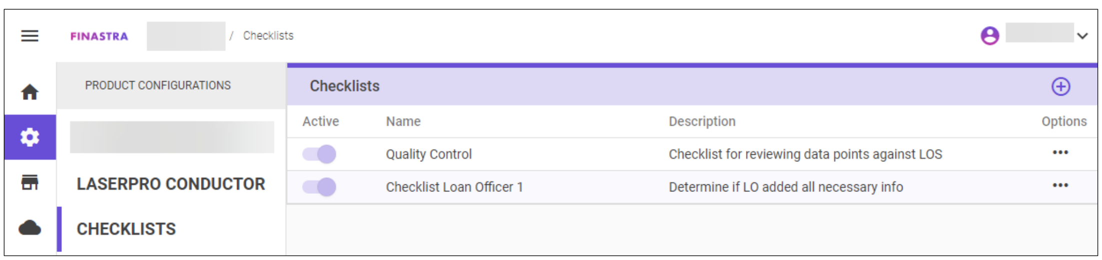
Once checklists are created and enabled by your administrator, the checklists display under the **Checklist** tab in **Your Tools** on the Document Editor screen. Users can select the appropriate checklist to complete based on the requirements outlined by your institution.

Creating and Editing Checklists

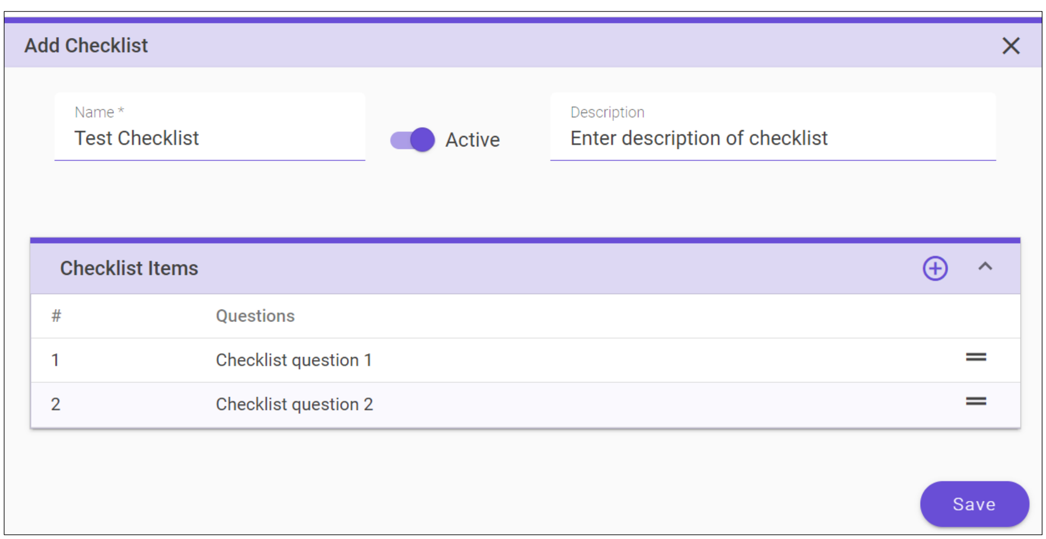
Anyone assigned to the Administrator Role in the Total Lending Platform can create checklists for your financial institution. For more information about assigning roles in Total Lending, see the Total Lending Platform Quick Reference Configuration Portal Roles in the Finastra Success Community.

1. Login to https://configuration.test.total-lending.com/.
2. Click the Product Configurations icon.

3. Click **LASERPRO CONDUCTOR** and then click **CHECKLISTS**.



4. Click the plus icon to create a new checklist. The Add Checklist section appears.

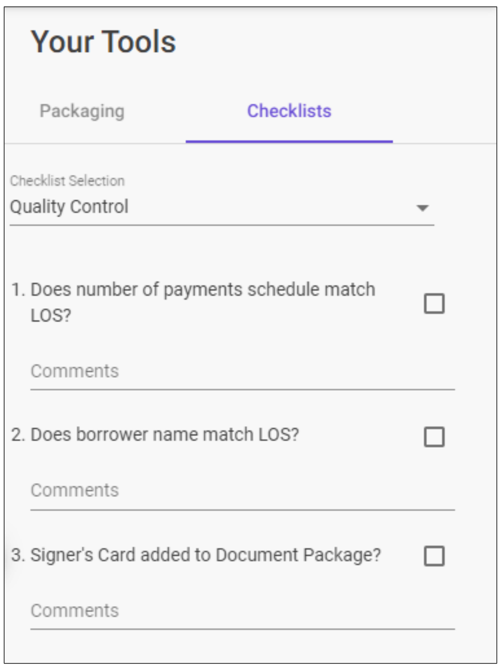


5. Enter a name (required) and description for your checklist.

6. In the Checklist Items section, click the plus icon to add new checklist questions. A free-form field is enabled for you to enter your checklist items.
7. When you are finished adding checklist items, click **Save**. New checklists are active by default. Toggle the **Active** button to disable the checklist. The new checklist will appear on the **Checklists** section in Configuration Portal.
8. To edit a checklist, click the ellipses in the **Options** column next to the checklist you want to edit. Click **Save** after completing your edits.

Using Checklists in the Document Editor

1. Click the **Checklists** tab in the **Your Tools** menu.
2. Select the checklist to use from the **Checklist Selection** drop-down.
3. Complete the checklist according to the requirements outlined by your institution.



Managing Document Packages

Document packages upload to LaserPro Conductor after being processed in LaserPro. The document package appears in My Queue with a corresponding transaction number.

Adding a Document

LaserPro Conductor makes it easy to add documents to a document package. When adding a document, the file must be in PDF format.

1. Click **Add Documents**. File Explorer opens, where you can select the document you want to upload to the document package.
2. Select the document to add from your computer and click **Open**.

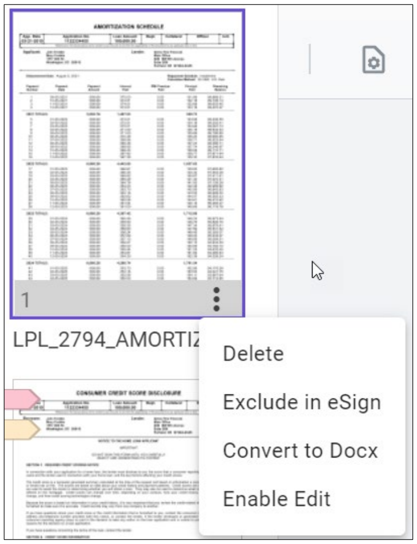
Note: The document is added to the end of the package. See Rearrange Documents for steps on how to change the order of the documents in the package.

Removing Documents

You can delete a document from a document package or exclude a document from the panel view or the grid view.

To delete a document from a document package:

1. Click the ellipses on the document thumbnail and select **Delete**.



2. Click **YES, I'M SURE** to remove the document from the package.
3. If you do not want to delete the document, click **NO, KEEP DOCUMENT,** or click the **X** in the upper right-hand corner.

Rearrange Documents

You can rearrange the documents in the package using the thumbnails in the panel or grid views.

1. Click the thumbnail of the document you want to move.
2. Drag the document to the new location. The page numbers will update automatically.
3. Click **Save**.

Edit a Document

There are two ways to edit documents in LaserPro Conductor; converting to a Microsoft Word file or editing in the Document View in LaserPro Conductor.

Convert to Docx

1. Select **Convert to Docx** from the ellipses on the document thumbnail. The converted document downloads to your computer as a Microsoft Word version of the document.
2. Edit as needed and save as a PDF.
3. Click Add **Documents** and upload the PDF file.

   Note: The Word file must be converted to PDF before uploading it to LaserPro Conductor. The file is added to the end of the package but does not replace the original document. The original document must be deleted manually.

Enable Edit

You can use the enable edit function to make changes to the document displayed in Document View without leaving LaserPro Conductor.

1. Select **Enable Edit** from the ellipses on the document thumbnail.

   Note: Enable Edit is only available for the currently displayed document.

2. Blue boxes surround the editable fields. Click one of the following icons:
   - Edit Icon - An edit pop-up window opens. You can change, bold, italicize, or underline the content
   - Delete Icon – Delete the content in the selected box. Once content is deleted it cannot be recovered.
3. After updating the content, click **Save**.
4. Once you are finished with your edits to the document, click the ellipses on the thumbnail and select **Save Edit**.

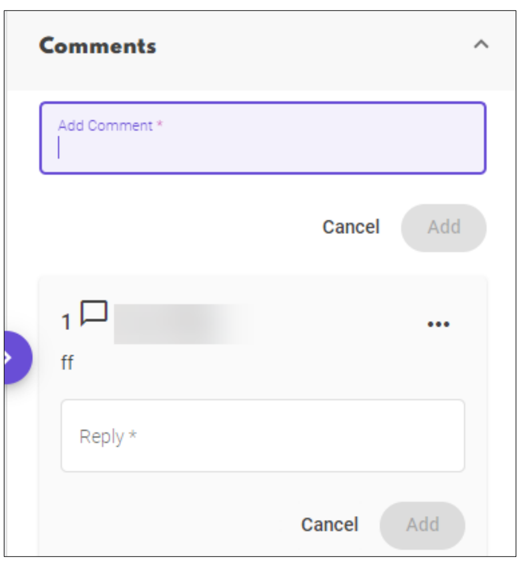
Comments

You can add comments to the document package or individual documents.

Comments at the Package Level

Add, reply, and delete comments in the document package using the Comments menu.

1. Click the arrow next to the Comments menu.
2. Enter your comment in the Comment field. The **Add** button is greyed out until a comment is entered.
3. Click **Add**. Your comment appears in the list of comments below in the order they were submitted.



4. To reply to a comment, click the **Reply** drop-down.
5. Enter your reply and click **Add**. Your reply will appear under the comment you are responding to.
6. To delete a comment, click the ellipses and select **Delete**.

Comments at the Document Level

Comments at the document level are managed in the Document View, where you can add and delete comments. Additionally, you can change the appearance of the comment bubbles, move the comments to different locations in the document, change the status of comments, and reply to comments.

To add a comment:

1. Right click to bring up the comment icon
2. Click the comment icon and click on where you want to add the comment. A pop-up window opens to add the comment.
3. Enter your comment in the free-form field and click **Save**.

To delete a comment:

1. Click on the comment bubble.
2. Click the trashcan icon.

Change the appearance of comment bubbles:

1. Click on the comment bubble.
2. Click the artist palette icon.
3. Select the desired color for the comment and use the slider to change the opacity of the comment bubble.

Change the status of a comment:

You can change the status of the comment to one of the following:

- Accepted
- Rejected
- Cancelled
- Completed
- None (default status)
- Marked
- Unmarked

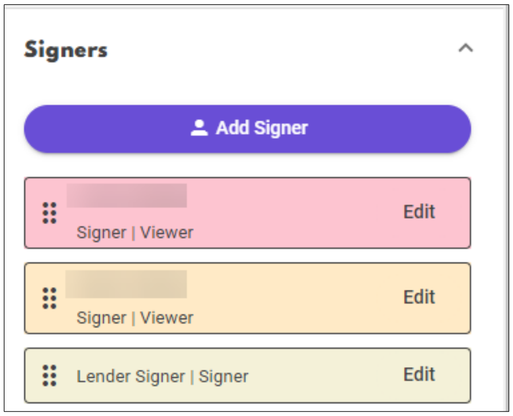
Reply to a comment:

1. Enter your reply in the Add reply field.
2. Click the send icon.

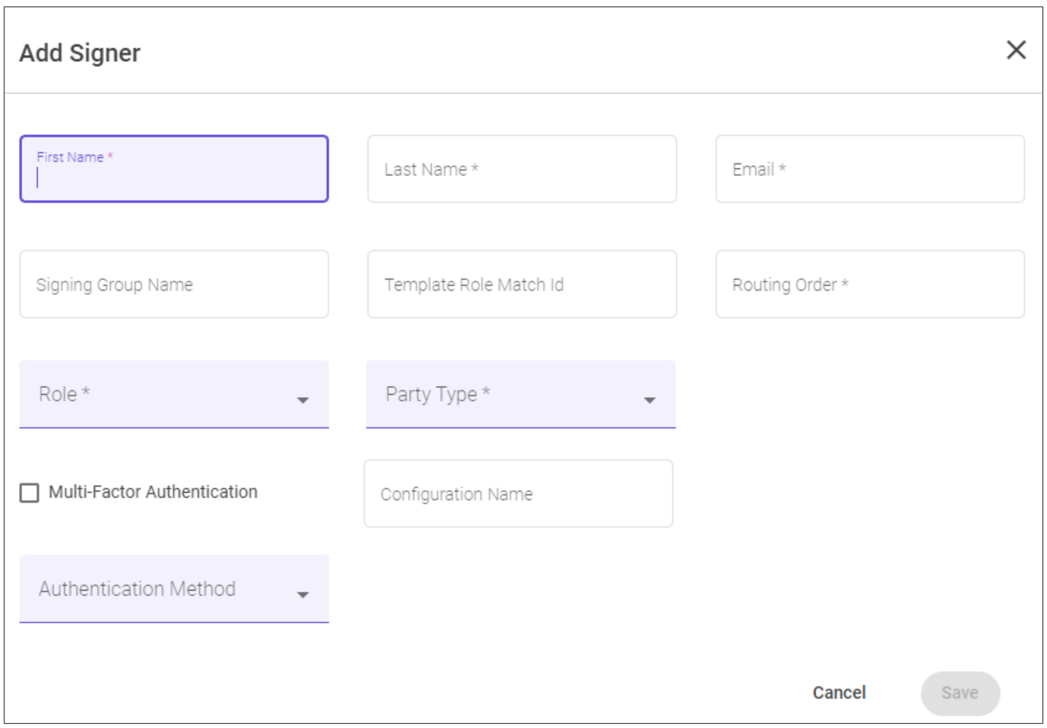
Adding and Editing Signers

You can add signers to the document in the document package if needed.

1. Select the document you want to add a signer to from the **Select Document** drop-down or by clicking the document thumbnail on the left-hand side.
2. Click **Add Signer** from the **Signers** menu on the right-hand side of the screen.



3. Complete the applicable fields in the Add Signer pop-up window:



Field	Description
First and Last Name	Required fields. The first and last name of the signer you are adding.
Email	Required field. The email address of the signer you are adding.
Signing Group Name	The name assigned to a group of signers when the Party Type is set to Signing Group. This field is only available when the Party Type is Signing Group.
Template Role Match ID	A unique ID that matches a role ID in the eSign vendor's system.

Field	Description
Routing Order	Required field that determines the order the loan documents are routed to the signer.
Role	Required field that assigns a role of **Signer** or **Viewer** to the signer you are adding.
Party Type	Required field used to identify the signer.
Multi-Factor Authentication	Selecting Multi-Factor Authentication enables a second Authentication Method drop-down. The options available in Authentication Method 2 do not include what was selected for the primary authentication method.
Authentication Method	Required field. Methods of verifying the identity of the recipient as defined by your eSign vendor.

4. After completing the fields in the **Add Signer** pop-up window, click **Apply**. The signer card for the new signer appears in the Signers menu on the right-hand side of the Document Editor screen.
5. To edit a signer, click **Edit** and update the fields as needed, then click **Apply**.
6. To add the signer to the document, drag the signer card to the document where you want to add the signature block.

Sending for eSign

1. Click **Send for eSign** when the package is ready to send to your eSign vendor.

   Note: The **Select Documents for eSign** pop-up window appears, showing all the documents in the package. Documents included in the eSign package are highlighted in purple.

2. Click the green checkbox to unselect documents.
3. Click **Select All** to select all the documents.
4. Click **Clear** to clear all the selected documents.
5. After confirming the applicable documents are included for eSign, click **Send**.

Finastra Support

Finastra support offers several options to help you get the most out of your software, including a self-service Case Management tool, and phone support.

Please visit the Finastra Customer Success Community at https://support.finastra.com to log in to our online self-service Case Management system. If you forgot your password, simply click the Forgot Password link. Once logged in, you have the ability to use the Finastra Customer Success Community to troubleshoot issues and find answers to questions.

If your financial institution is not currently using these tools and would like to, please contact Finastra support for assistance.

Note: The Financial Modernization Act of 1999, also known as the Gramm-Leach-Bliley Act or GLB Act, includes provisions to protect consumers' personal financial information held by financial institutions. Therefore, Finastra support cannot accept data or screen captures that contain personal financial information via email or fax. For information about secure file transfer methods, contact Finastra support.

The future of digital finance can start here.
Consider our planet before printing.

About Finastra
Finastra is a global provider of financial software applications and marketplaces, and launched the leading open platform for innovation, FusionFabric.cloud, in 2017. It serves institutions of all sizes, providing award-winning solutions and services across Lending, Payments, Treasury & Capital Markets and Universal Banking (digital, retail and commercial banking) for banks to support direct banking relationships and grow through indirect channels, such as embedded finance and Banking as a Service. Its pioneering approach and commitment to open finance and collaboration is why it is trusted by ~8,600 institutions, including 90 of the world's top 100 banks. For more information,
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