

MAC Sub-Committee Minutes

Sub-Committee:	Portal Enhancements	
Date/Time of Meeting:	October 21-22, 2019	
Committee Chair:	Terry Clay, Hudson Advisors	
MAC Director:		
McCracken Representatives: *Notes Submitted by:	Kate Drawert	
Attendees:	Name	Company
Various Conference Attendees		

Meeting Minutes:

Day 1- October 21st

- Terry Clay, Hudson Advisors, is seeking input from everyone – you don't have to be a member of the sub committee
- Currently only 10 customers are represented on the Portal subcommittee – skewed if only certain customer participate
- Previously the committee was focused on prioritizing the existing enhancements list - Future focus on new enhancements
- What do you want to see?
 - Reserve disbursement widget
 - Create a Reserve disbursement widget (TJ had a prototype for this)
 - Integrate Borrower Inquiry and Inspections, Process Manager
 - Request can be kicked off in Borrower Inquiry
 - Approval process similar to functionality in Budget
 - Automate the creation of Strategy Transactions
 - Rules/Trigger to monitor Reserve Balances
 - Trigger functionality
 - Release 17.8 – customers would need to request it to be turn on
 - 48 canned triggers but can add to it
 - Works with rules engine
 - Is there a plan to move CS module to the Portal?
 - Yes this is the long term plan but there is an interim plan to just have Strategy accessed through the web first
 - Emails Ability
 - Email generated when a task is generated – we did this with Budget
 - Individual preference for those that don't want to work out of the Portal
 - We would need requirements on this
 - Widget Shape
 - Can widgets be made square – we did this is past – code probably still there
 - SOFR Change
 - Mapping Tool for ARM module so updates can be made in bulk

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- Interim release will handle SOFR requirements
- Widget Test Color
 - Ability to change the color of the text on a Widget if you use a light color for the Widget
- Hide the side bar to maximize the what you see
 - This happens when you open a widget within the Portal – not in a new window
 - In R20, there will be a new default, when a widget is opened it will be opened in a new window to optimize view
- More Mapping Tools
 - Customer can see what is pending on the Work in Process list posted on the website
- Job Status Widget
 - Need more visibility into pending jobs
- How are other customers utilizing the Portal
 - Platform to share ideas

Day 2 – October 22nd

- Terry Clay would like to have future calls focus on specific requests to discuss requirements – shift focus off current jobs
- BASEL Custom screen (custom for Wells)
 - Needs enhancements
- Modifications
 - Current widget built for IRP
 - Need to capture additional data for regulatory requirements
 - Types of modifications
 - Minor vs. material
 - History since a loan can be modified more than once
- New functionality on the MFS website to post questions
 - Vehicle to share ideas
- McCracken University
 - Use as a platform for customer to share their ideas or how they use Portal

Follow-Up

Customers:

McCracken:

Meetings are the 3rd Tuesday each month at 3:00 pm ET.

Next meeting: December 17th