



MaTi

Mapping Tool

Compatible Releases:

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Introduction

Overview

The Mapping Tool, or MaTi, is robot software offered as part of the Strategy Suite of products. MaTi allows users to upload data quickly and easily from spreadsheets into Strategy. MaTi uses McCracken-maintained templates designed to map and upload data into many areas of the system. Whether its data updates like replacing a Servicer code on select loans, or adding new financial statement records, MaTi streamlines the data entry process eliminating duplicate data entry.

MaTi has four main features to accomplish a data upload.

Uploading

Users can upload files from both their local computer as well as from a shared network drive.

Templates

McCracken creates and maintains the Mapping Tool templates. Each template is designed to upload information into the system related to a specific topic. See the System Administration section for a listing of all available templates.

Validation

The templates recognize all the same edits as the user interface screens for entering the information to insure data integrity. Once data has been uploaded and mapped into the Template, Strategy validates the data, marking the data that does not meet the system requirements built into the template. Strategy provides tools to quickly correct any errors and complete the upload process.

Maps

Once a spreadsheet is mapped to a template, the relationship of the spreadsheet location and the associated template location is saved. The next time you upload a spreadsheet in the same format as a previously mapped spreadsheet, the upload tool will recognize the format, and suggest a map. Selecting the suggested mapping will upload the data to the template using the saved mapping.

Strategy's MaTi



Widget Prior to Release 20



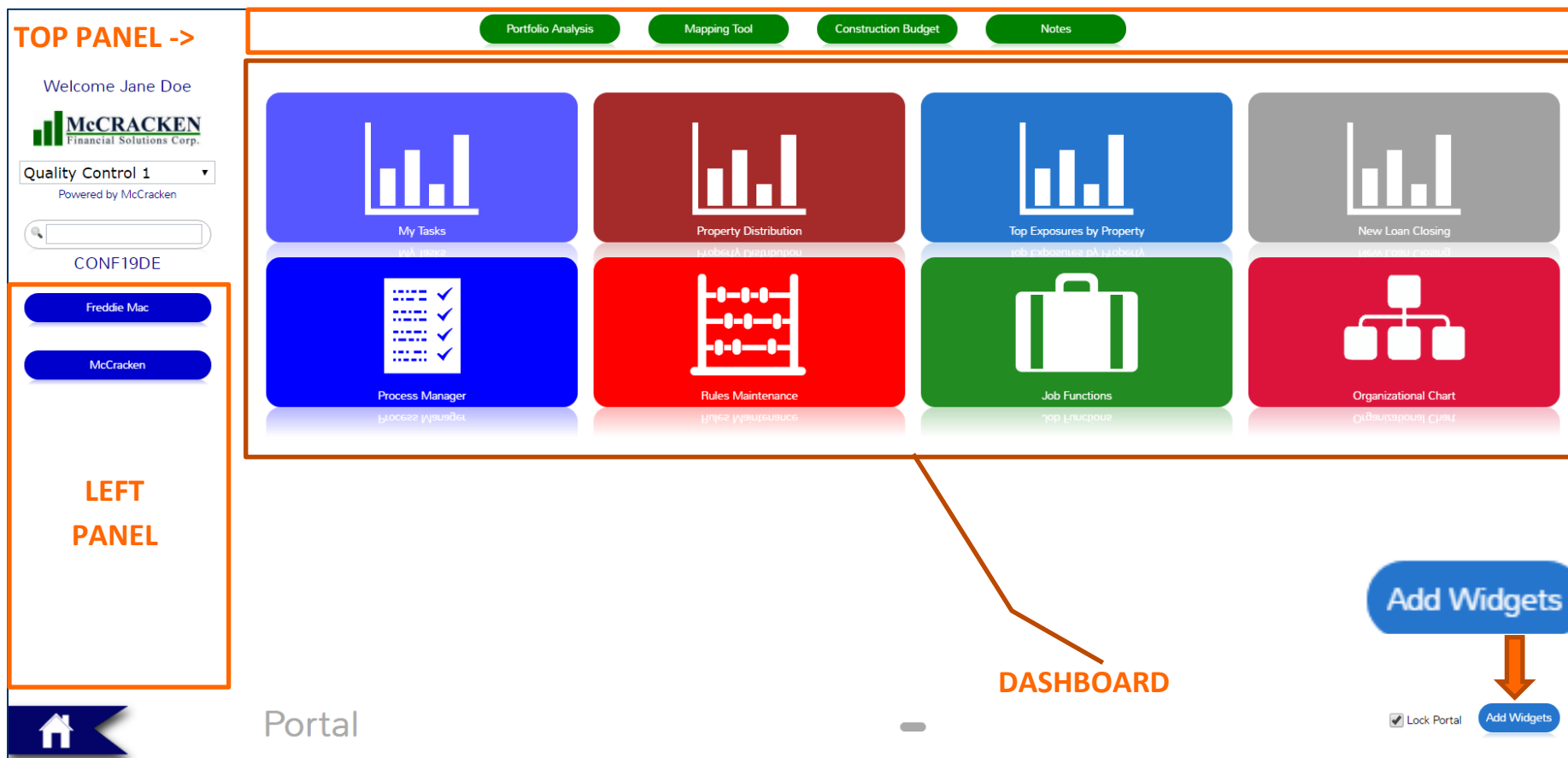
Widget at Release 20

MaTi is available in Strategy's Portal.

In 2018, the Mapping Tool was renamed MaTi. In Release 20, the widget was changed to read MaTi not Mapping Tool. Throughout this manual, the terms Mapping Tool and MaTi will be used interchangeably.

Adding the Mapping Tool (MaTi) to your Portal

MaTi, or the Mapping Tool, is available from the Add Widgets option on the Portal Dashboard.



The screenshot displays the Portal Dashboard interface. On the left is the **LEFT PANEL**, which includes a welcome message for Jane Doe, the McCracken logo, a 'Quality Control 1' dropdown menu, a search bar, and user buttons for 'Freddie Mac' and 'McCracken'. The top of the dashboard features a **TOP PANEL** with tabs for 'Portfolio Analysis', 'Mapping Tool', 'Construction Budget', and 'Notes'. The main area contains eight widgets: 'My Tasks', 'Property Distribution', 'Top Exposures by Property', 'New Loan Closing', 'Process Manager', 'Rules Maintenance', 'Job Functions', and 'Organizational Chart'. An orange arrow points from the 'Mapping Tool' tab to the 'Add Widgets' button in the bottom right corner. The 'Add Widgets' button is a blue pill-shaped button with the text 'Add Widgets'. Below it is a checkbox for 'Lock Portal' and another 'Add Widgets' button. The word 'DASHBOARD' is written in orange text below the arrow.

Clicking 'Add Widgets' opens the Add Widgets window within the Portal Dashboard.

Notes BuildRite Financial Statements Appraisal Portfolio Analysis Strategy Reports Rules Maintenance Process Manager Security

Welcome Strategy User

McCRACKEN
Business Analyst
Powered by McCracken

Search: R2ODOC

Freddie Mac
Loan Information
McCracken
Process Metrics
Tools
Utilities
Environmental

Widget Search: Ma

Finance Maturing Loans Org Chart (All Managers) Process Manager

MaTi

This Application Widget provides authorized users access to the Mapping Tool. Users with appropriate authority can access the tool to perform template driven data uploads and exports. Strategy Security is required to be able to access this tool and its individual templates.

Widget is currently on your dashboard

Add to Dashboard Add to Left Panel Add to Top Panel


Lock Portal Return to Portal

FIGURE 1-THE ADD WIDGETS PAGE OPENS WITHIN THE PORTAL DASHBOARD.

Search for Mapping tool using the Widget Search button.

Select where you wish the Mapping Tool widget to appear in your Portal. Options appear below the widget in green, Add to Dashboard, Add to Left Panel, Add to Top Panel.

MaTi



MaTi

Widget is currently on your dashboard

Add to Dashboard
Add to Left Panel
Add to Top Panel

This Application Widget provides authorized users access to the Mapping Tool. Users with appropriate authority can access the tool to perform template driven data uploads and exports. Strategy Security is required to be able to access this tool and its individual templates.

Use Return to Portal or the Home button to leave the Add Widgets page.

The Mapping Tool widget appears on your Portal with a ‘NEW Sticker’. The sticker will remain until you log out of the Portal. The next time you log in the “New Sticker” will be gone.

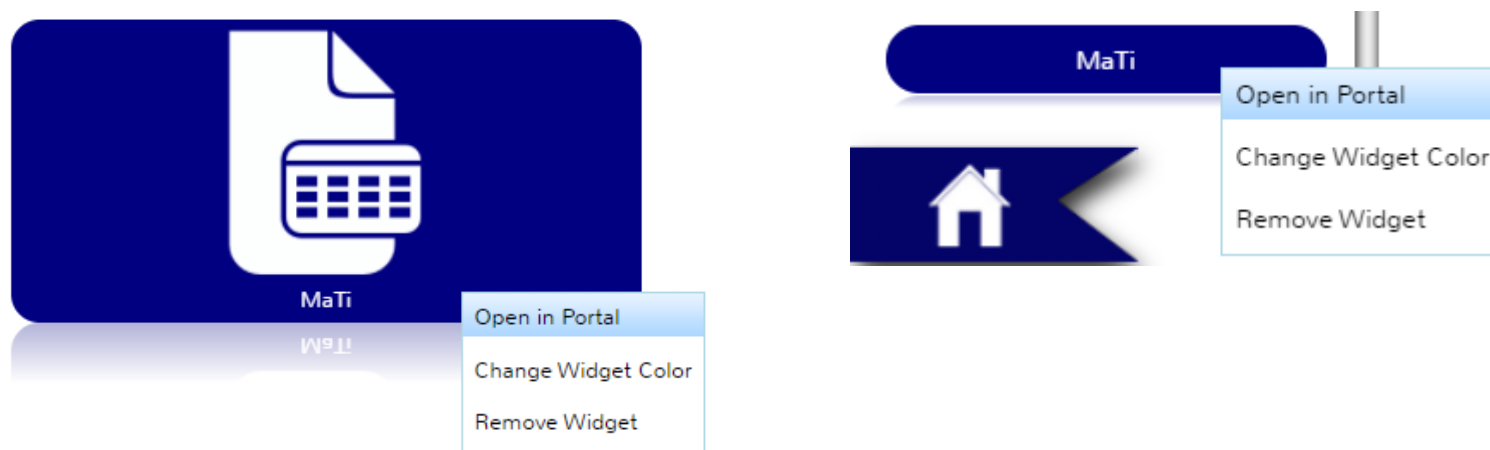


When widgets are added to the Left Panel or Top Panel, they appear as oblong ovals.

Accessing the Mapping Tool

To access MaTi, select the Mapping Tool widget from the Portal. As of Release 20, MaTi will default to open in a new window to provide maximum work area. Users who wish to work within the Portal to continue to have access to the top and left panels while working can do so by right clicking and selecting Open in Portal.

Release 20



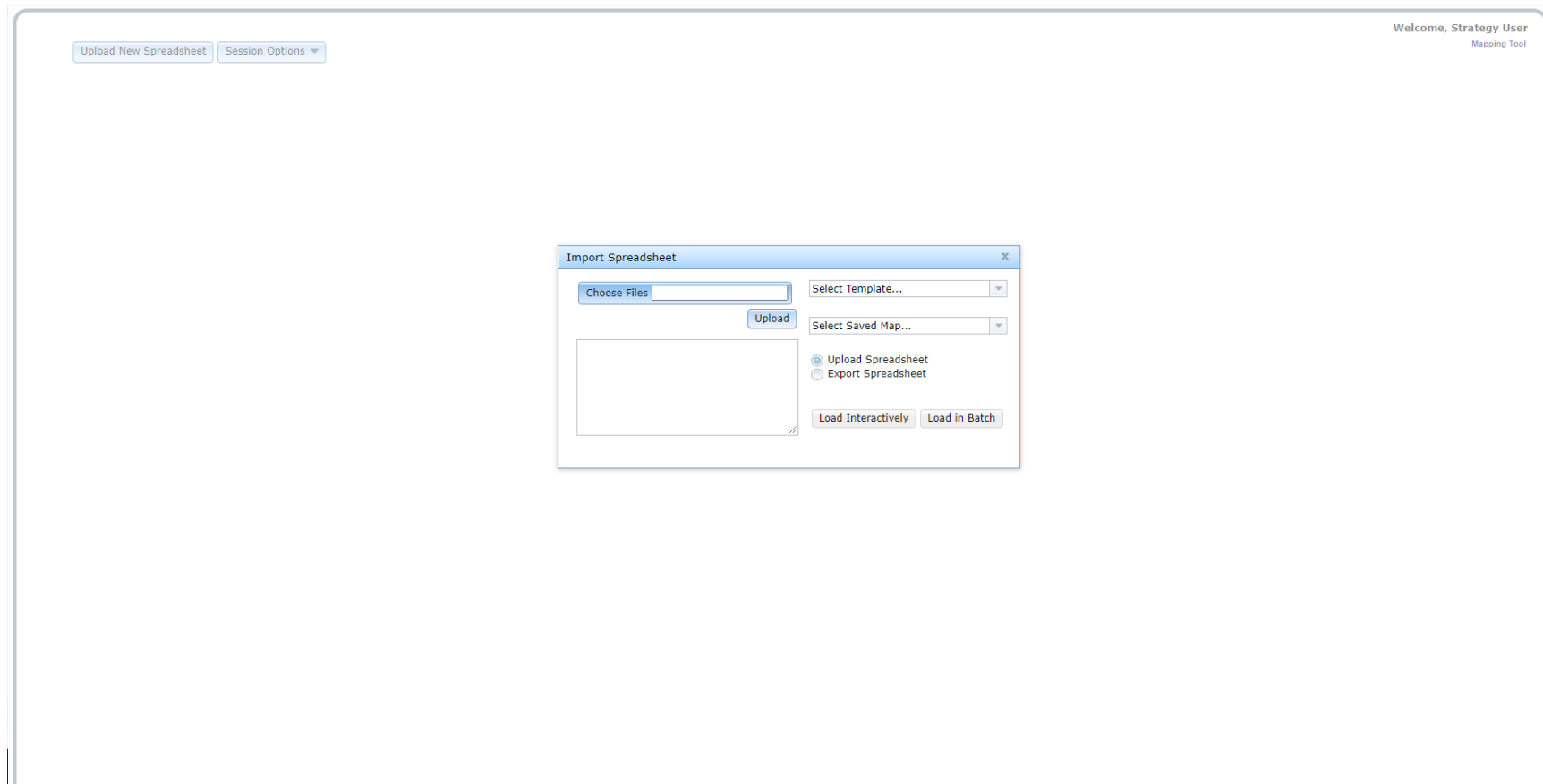
Prior to Release 20

We recommend that you right click on the widget and select 'Open in New Window' for maximum work area.



Clicking the widget or selecting 'Open in New Window' from the right mouse window opens the Mapping Tool application.

Note: See the section on [Security](#) to review who can access the application. Users must have access to the Mapping Tool, Mapping Tool Main, and the specific template being used to upload data, and have Write access to the area of the system where you are uploading information.



2-MAT1 OPENS IN NEW WINDOW BY DEFAULT AT RELEASE 20. RIGHT MOUSE OPTION PRIOR TO RELEASE 20.

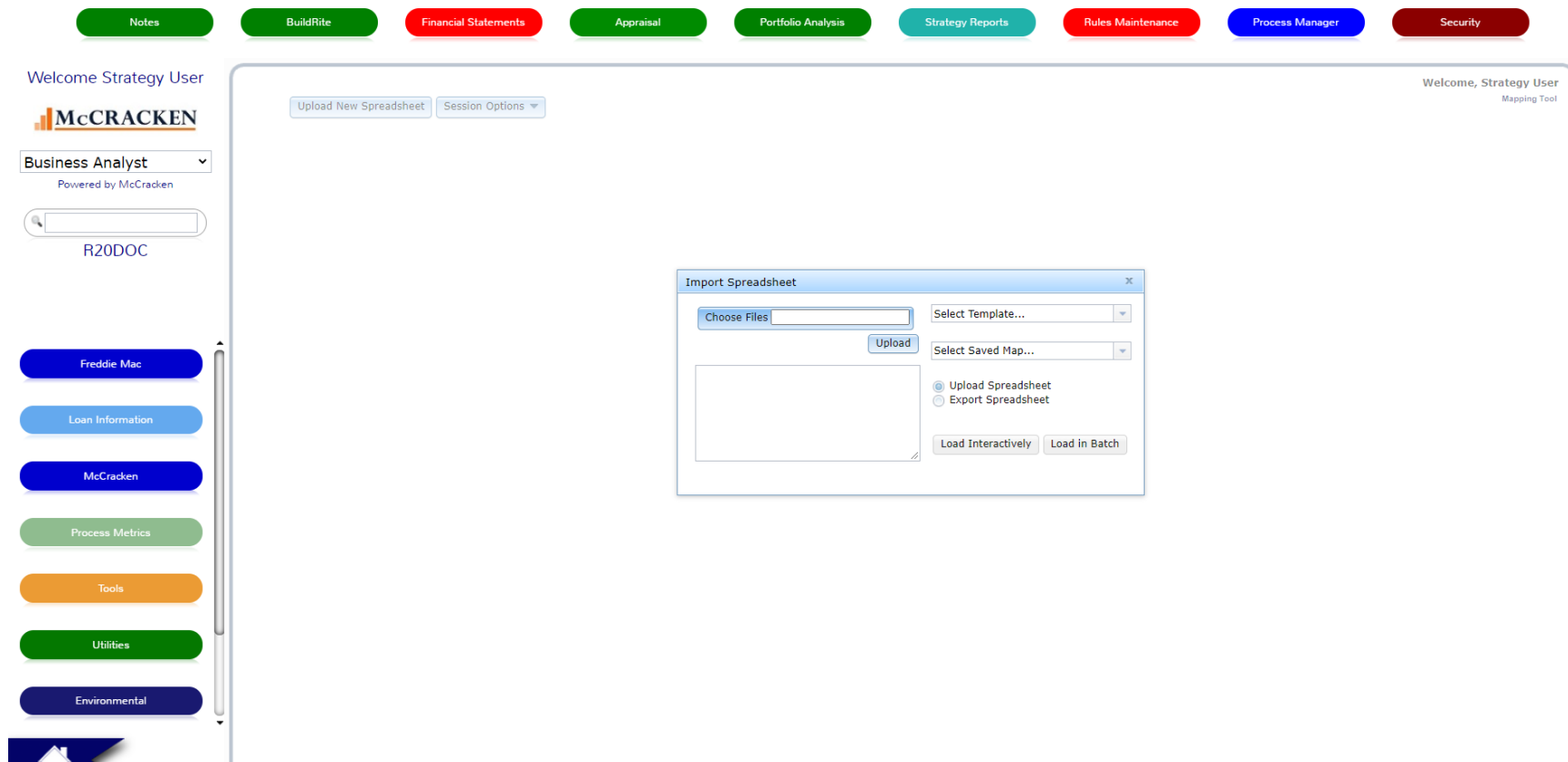


FIGURE 3-MATi OPENED IN THE DASHBOARD USING THE RIGHT MOUSE OPTION AT RELEASE 20. USERS HAVE ACCESS TO THE TOP AND LEFT PANELS. HOME BUTTON AVAILABLE TO RETURN TO PORTAL.

Upon opening the application, the Import Spreadsheet window displays.

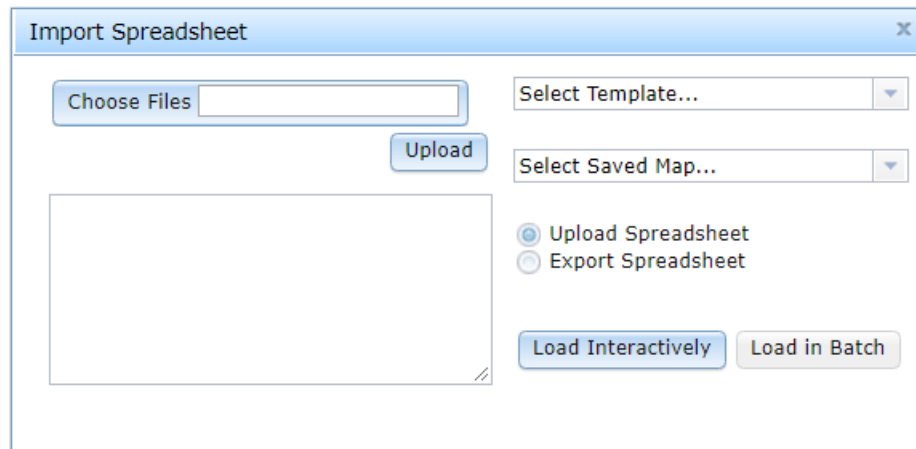


FIGURE 4-MAPPING TOOL OPENS WITH THE IMPORT SPREADSHEET PRESENTED.

Uploading a File for the First Time

To upload a file for the first time:

1. Click in the **Choose File** field.

This will open Windows Explorer in Open mode, shown below, where a user can search their local hard drive or network.

1. Locate your file, highlight it, and click open.

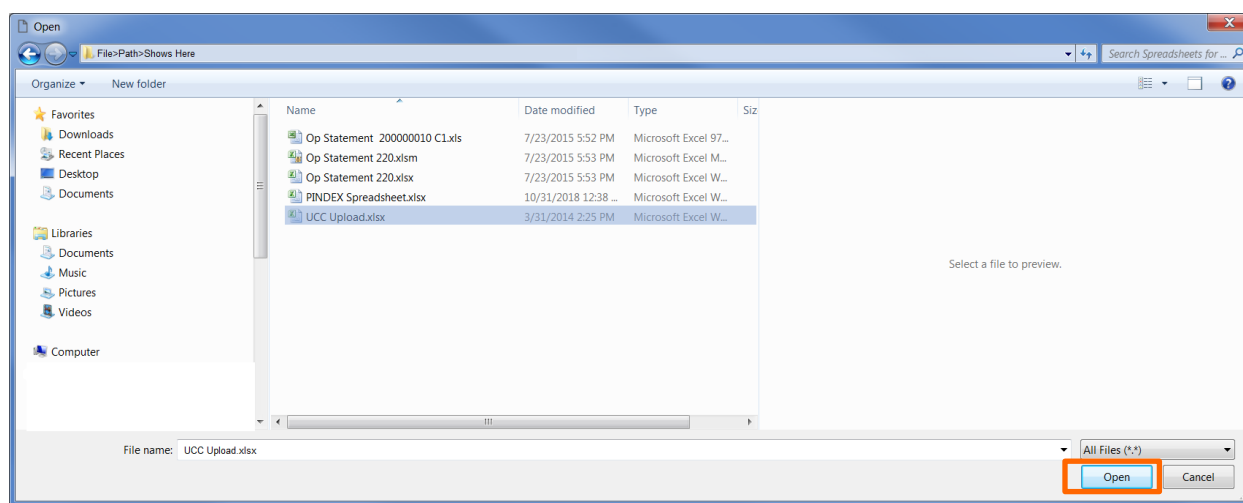


FIGURE 5-WINDOWS EXPLORER IN OPEN MODE. USE THIS WINDOW TO LOCATE AND SELECT YOUR FILE FOR UPLOAD.

NOTE: Mapping Tool supports spreadsheets saved as.xlsx file types.

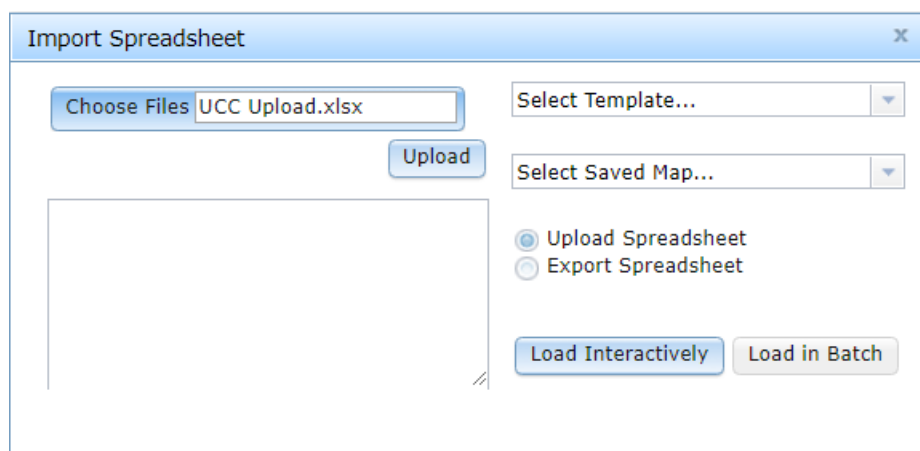


FIGURE 6-THE SELECTED FILE NAME APPEARS IN THE CHOOSE FILES FIELD.

2. Click the Upload button.

Import Spreadsheet

Choose Files

Select Template...

Upload

Select Saved Map...

begin to Upload files:

UCC Upload.xlsx, 18909

Uploaded file UCC Upload.xlsx to

/opt/IBM/WebSphere/AppServer/profile

s/AppSrv11/installedApps/localhostNod

e11Cell/MWS_MTEAR_19D.1.0iAPI_WA

S8.5.5.ear/MWS_MT.war/uploads/UCC

Upload.xlsxUpload complete.

☒ Upload Spreadsheet
☐ Export Spreadsheet

Load Interactively

Load in Batch

FIGURE 7-STATUS OF UPLOAD APPEARS BELOW THE CHOOSE FILES FIELD. SHOWS UPLOAD COMPLETE.

- Select the template corresponding to the data in the spreadsheet using the Select Template dropdown. The example is demonstrating the upload of UCC data. We are selecting UCC from the drop-down.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1		state	county	city	filing type	filed against	original file			current filing		Lien position	Document frequency	Location of UCC						
2	UTLNN	UTFSTA	UTFCOU	UTFCITY	UTFTYPE	UTFIRA	UTDBTN	UTCREG	original filing date	UTCREG	current filing date	UTLPROP	UTLLEN	UTFREQU	UTDOC	UTLOC	review date	cont prep date	refiling date	UTDN
3		107329	CO	ELP	S	Fixture Filing	WOODLAN	20032011	1/31/2003	20032011	1/31/2003	1	1	5Y			7/31/2006	7/31/2006	1/31/2007	
4		109534	IL	COO	S	Fixture Filing	BIT HOLDI	18113442	10/28/2002	18113442	10/28/2002	1	1	5Y			4/28/2014	4/28/2014	10/28/2014	
5		109546	TV	DAL	S	Fixture Filing	JOSEY-TRI	03-000635	10/28/2002	03-000635	10/28/2002	1	1	5Y			4/28/2007	4/28/2007	10/28/2007	
6		109581	IL	LAK	S	Fixture Filing	HERBERT	16046673	10/30/2002	6046673	10/30/2002	1	1	5Y			4/30/2007	4/30/2007	10/30/2007	
7		109729	DE	ARL	S	Fixture Filing	JBG/ROSSI	2270815	10/28/2002	2270815	10/28/2002	1	1	5Y			4/28/2007	4/28/2007	10/28/2007	
8	10978000	CA	CLA	S	Fixture Filing	EQUUS LA	03105601		4/11/2003	03105601	4/11/2003	1	1	5Y			10/11/2007	10/11/2007	4/11/2008	
9		109801	CA	SNC	C	Fixture Filing	NEXUS EQ	13750957	6/23/1997	16531197	10/10/2002	1	1	5Y			12/23/2007	12/23/2007	6/23/2008	
10		109810	TX	SNC	S	Fixture Filing	NEXUS EQ	98016603	1/15/1998	02269020	9/26/2002	1	1	5Y			7/15/2007	7/15/2007	1/15/2008	
11		109820	GA	COB	C	Fixture Filing	TOWN CEI	03320030	4/21/2003	03320030	4/21/2003	1	1	5Y			10/21/2007	10/21/2007	4/21/2008	
12		109834	GA	COB	C	Fixture Filing	TOWN CEI	2003-009C	4/21/2003	2003-009C	4/21/2003	1	1	5Y			10/21/2007	10/21/2007	4/21/2008	
13		109844	NV	CLA	S	Fixture Filing	SCOTT INC	20030102	4/14/2003	20030102	4/14/2003	1	1	5Y			10/11/2007	10/11/2007	4/11/2008	
14		109864	IL	COO	S	Fixture Filing	LASALLE N	3751607	10/16/1997	5517125	7/3/2002	1	1	5Y			4/16/2007	4/16/2007	10/16/2007	
15		109878	FL	PAL	S	Fixture Filing	SGB INVE	98000001	1/22/1998	20020214	9/12/2002	1	1	5Y			7/22/2007	7/22/2007	1/22/2008	
16		109886	WA	SNO	C	Fixture Filing	ARTHUR W	98033001	3/30/1998	20021204	12/4/2002	1	1	5Y			9/30/2007	9/30/2007	3/30/2008	
17		109903	WA	SNO	S	Fixture Filing	ARTHUR W	98-089-02	3/30/1998	2002-339-	12/4/2002	1	1	5Y			9/3/2007	9/3/2007	3/3/2008	
18		109933	CA	ORA	S	Fixture Filing	CABALLER	98098606	4/7/1998	02351091	12/13/2002	1	1	5Y			10/7/2007	10/7/2007	4/7/2008	
19		109937	CA	SNC	S	Fixture Filing	CARIBBEA	98147602	5/26/1998	03029C06	1/28/2003	1	1	5Y			11/26/2007	11/26/2007	5/26/2008	
20		109958	AZ	MAR	C	Fixture Filing	OLD COLO	01020656	6/16/1998	01020656	6/16/1998	1	1	5Y			6/16/2016	6/17/2016	6/16/2016	
21		109961	FL	INR	S	Fixture Filing	PORT EVE	98000017	8/3/1998	20030397	5/14/2003	1	1	5Y			2/3/2008	2/3/2008	8/3/2008	
22		109966	UT	GND	S	Fixture Filing	CANYONL	98-612151	7/17/1998	12267320	4/3/2003	1	1	5Y			1/17/2008	1/17/2008	7/17/2008	
23		109975	IL	COO	S	Fixture Filing	WEGLARZ	3872812	6/29/1998	6690319	3/13/2003	1	1	5Y			12/29/2007	12/29/2007	6/29/2008	
24		109993	TX	DAL	S	Fixture Filing	ATRIUM C	98196997	10/1/1998	03-003623	7/30/2003	1	1	5Y			4/1/2008	4/1/2008	10/1/2008	
25		110005	FL	POL	S	Fixture Filing	RUTHVEN	98000022	10/5/1998	20030400	7/8/2003	1	1	5Y			4/5/2008	4/5/2008	10/5/2008	
26		110026	FL	POL	C	Fixture Filing	RUTHVEN	0	10/6/1998	0	10/6/1998	1	1	5Y			4/6/2003	4/6/2003	10/6/2003	
27		110027	CO	BOU	S	Fixture Filing	RED BUSH	19982068	11/6/1998	20032073	7/9/2003	1	1	5Y			5/6/2008	5/6/2008	11/6/2008	

FIGURE 8-SCREEN SHOT OF THE SPREADSHEET CONTAINING UCC INFO FOR UPLOAD.

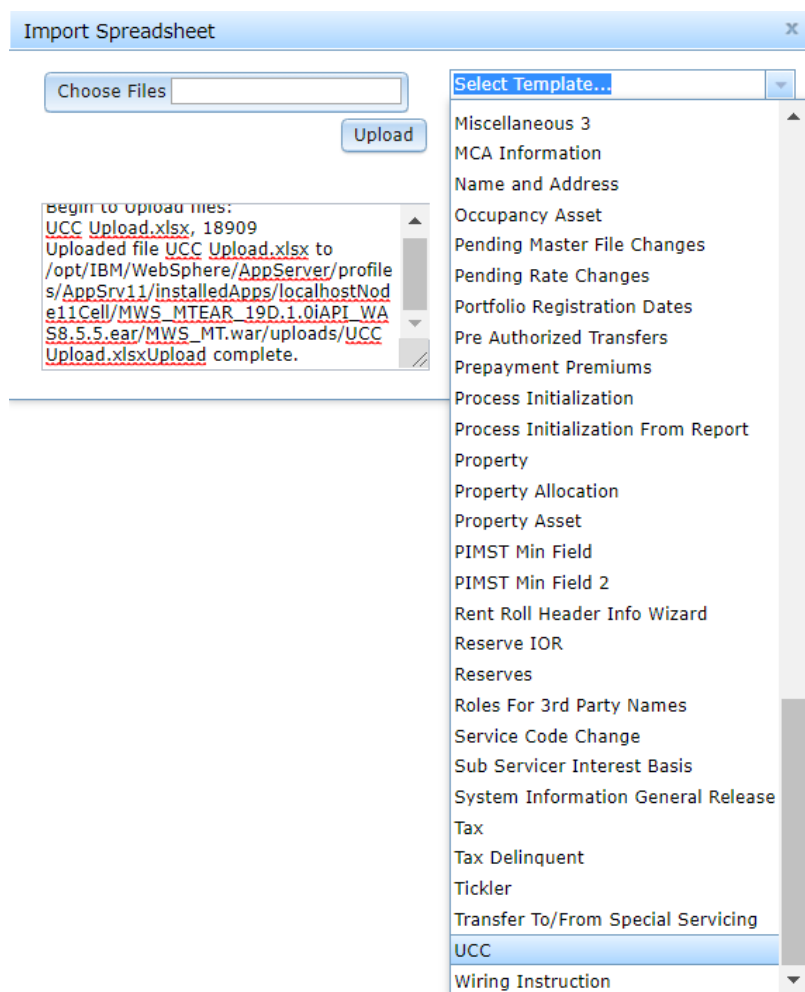


FIGURE 9-USE THE SELECT TEMPLATE DROP-DOWN TO CHOOSE THE APPROPRIATE TEMPLATE FOR DATA BEING UPLOADED.

The first time you upload a spreadsheet into the Mapping Tool there will be no Saved Map to use. The Upload button is active.

4. Click 'Load Interactively'. The Mapping Tool page opens to the Mapping Page with the spreadsheet uploaded on the left and the template available on the right.

Working on the Mapping page.

9
10

Upload New Spreadsheet
Session Options

Welcome, Jane Doe

Mapping Tool

UCC Template

2

Column A

Column B

Column C

Column D

Column E

Column F

Column G

<input type="checkbox"/> Row 1		state	county	city	filing type	filed against	
<input checked="" type="checkbox"/> Row 2	UTLNN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA	UTDBTN
<input checked="" type="checkbox"/> Row 3	107329	CO	ELP		S	Fixture Filing	WOODLAND PARADIS
<input checked="" type="checkbox"/> Row 4	109534	IL	COO		S	Fixture Filing	BIT HOLDINGS THIRTI
<input checked="" type="checkbox"/> Row 5	109546	TV	DAL	Houston	S	Fixture Filing	JOSEY-TRINITY MILLS
<input checked="" type="checkbox"/> Row 6	109581	IL	LAK		S	Fixture Filing	HERBERT J. KENDALL
<input checked="" type="checkbox"/> Row 7	109729	DE	ARL		S	Fixture Filing	JBG/ROSSLYN GATEW
<input checked="" type="checkbox"/> Row 8	10978000	CA	CLA		S	Fixture Filing	EQUUS LAS VEGAS A
<input checked="" type="checkbox"/> Row 9	109801	CA	SNC	1	C	Fixture Filing	NEXUS EQUITY II LLC
<input checked="" type="checkbox"/> Row 10	109810	TX	SNC		S	Fixture Filing	NEXUS EQUITY II LLC
<input checked="" type="checkbox"/> Row 11	109820	GA	COB		C	Fixture Filing	TOWN CENTER PARTI
<input checked="" type="checkbox"/> Row 12	109834	GA	COB		C	Fixture Filing	TOWN CENTER PARTI
<input checked="" type="checkbox"/> Row 13	109844	NV	CLA		S	Fixture Filing	SCOTT INDUSTRIAL I
<input checked="" type="checkbox"/> Row 14	109864	IL	COO		S	Fixture Filing	LASALLE NATIONAL T
<input checked="" type="checkbox"/> Row 15	109878	FL	PAL		S	Fixture Filing	SGB INVESTMENTS II
<input checked="" type="checkbox"/> Row 16	109886	WA	SNO		C	Fixture Filing	ARTHUR W. & MARIAI
<input checked="" type="checkbox"/> Row 17	109903	WA	SNO		S	Fixture Filing	ARTHUR W. & MARIAI
<input checked="" type="checkbox"/> Row 18	109933	CA	ORA		S	Fixture Filing	CABALLERO BOULEVA
<input checked="" type="checkbox"/> Row 19	109937	CA	SNC		S	Fixture Filing	CARIBBEAN/GENEVA
<input checked="" type="checkbox"/> Row 20	109958	AZ	MAR		C	Fixture Filing	OLD COLONY FINANC

6
7
8

Check All

Uncheck All

3
4

LOAN NUMBER

SEQ #

STATE

COUNTY

CITY

FILING TYPE

FILE

Row 1							
Row 2							
Row 3							
Row 4							
Row 5							
Row 6							
Row 7							
Row 8							
Row 9			5				
Row 10							
Row 11							
Row 12							
Row 13							
Row 14							
Row 15							
Row 16							
Row 17							
Row 18							
Row 19							
Row 20							

Clear Data

Save Mapping

Validate

FIGURE 10- MAPPING SCREEN AFTER UPLOAD OF NEW FILE FORMAT, NO MAPPING APPLIED.

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TABLE 1- MAPPING PAGE FEATURES EXPLAINED.

Item	Feature	Details
1	Spreadsheet Data/Spreadsheet Grid	Displays the data from the uploaded spreadsheet in the left side, or Spreadsheet Grid of the Mapping Page.
2	Include Row checkbox	Check boxes indicate whether the data in the row should be included in the transfer. (Row 1 is not checked so the column labels entered in that row will not be transferred.) Only checked rows move to the template. Use the buttons to Check All and Uncheck All rows at once.
3	Blue Bordered Columns	Located on the Template Grid on the right, the blue border indicates required fields. Data must reside in the columns with blue borders for each row in the template.
4	Update Checkboxes	The blue checkboxes shown in the template or right side of the screen indicate that the field is available for update.
5.	Template Grid	The Template Grid represents the Strategy fields supported for upload. This can represent data from one or more files.
6.	Clear Data	The Clear Data button will remove any mapped data from the right side of the Mapping window.
7.	Save Mapping	The Save Mapping button displays when the spreadsheet has not been loaded into the right side of the Mapping page using a previously defined mapping. This button allows you to save the mapping on the screen for future use. See the section on Save Mapping/Edit Mapping later in this document for available options.
8.	Validate	The Validate option runs the edit programs and indicates any data problems prior to submitting the data to Strategy.
9.	Upload New Spreadsheet	The 'Upload New Spreadsheet' button allows you to abandon the current spreadsheet and reload a new one. The button reopens the Upload Spreadsheet window.
10.	Session Options	There are several options related to mapping a spreadsheet into the system and performing the upload. See the section on Session Options later in this document.

Mapping Data – Rows and Columns

When mapping a new spreadsheet to the template, the data can be mapped by dropping and dragging data into the template.

Column to Column Mapping

Clicking a column header in the left side or “Spreadsheet Grid” of the mapping page selects the data in that column for all rows in the spreadsheet. The column header turns white to show selection. You can then click a column header or row header in the right side or “Template Grid” of the mapping page to map the data in the template.

Hovering over a column heading in the Template Grid of the Mapping Page displays the field name. If the field is bordered in blue, the field is a required field and the column must contain data for each row in the Template Grid of the Mapping Tool.

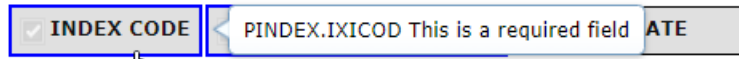


FIGURE 11-HOVER TEXT PROVIDES THE FIELD NAME FOR THE COLUMN.

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
Row 1							
Row 2	UTLNN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA	UTDBTN
Row 3	107329	CO	ELP		S	Fixture Filing	WOODLAND PARADIS
Row 4	109534	IL	COO		S	Fixture Filing	BIT HOLDINGS THIRTY
Row 5	109546	TV	DAL	Houston	S	Fixture Filing	JOSEY-TRINITY MILLS
Row 6	109581	IL	LAK		S	Fixture Filing	HERBERT J. KENDALL
Row 7	109729	DE	ARL		S	Fixture Filing	JBG/ROSSLYN GATEWAY
Row 8	10978000	CA	CLA		S	Fixture Filing	EQUUS LAS VEGAS A
Row 9	109801	CA	SNC		C	Fixture Filing	NEXUS EQUITY II LLC
Row 10	109810	TX	SNC		S	Fixture Filing	NEXUS EQUITY II LLC
Row 11	109820	GA	COB		C	Fixture Filing	TOWN CENTER PARTN
Row 12	109834	GA	COB		C	Fixture Filing	TOWN CENTER PARTN
Row 13	109844	NV	CLA		S	Fixture Filing	SCOTT INDUSTRIAL L
Row 14	109864	IL	COO		S	Fixture Filing	LASALLE NATIONAL T
Row 15	109878	FL	PAL		S	Fixture Filing	SGB INVESTMENTS II
Row 16	109886	WA	SNO		C	Fixture Filing	ARTHUR W. & MARIAI
Row 17	109903	WA	SNO		S	Fixture Filing	ARTHUR W. & MARIAI
Row 18	109933	CA	ORA		S	Fixture Filing	CABALLERO BOULEVA
Row 19	109937	CA	SNC		S	Fixture Filing	CARIBBEAN/GENEVA
Row 20	109958	AZ	MAR		C	Fixture Filing	OLD COLONY FINANC

FIGURE 12-IN THIS EXAMPLE COLUMN A IN THE 'SPREADSHEET GRID(SS)' OF THE MAPPING PAGE WAS MAPPED TO COLUMN A OF THE 'TEMPLATE GRID (TS)'. THE VALUE IN COLUMN A, ROW 2 (SS) MAPS TO COLUMN A, ROW 2 (TS), COLUMN A, ROW 3 (SS) TO COLUMN A, ROW 3 (TS) AND SO ON.

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
Row 1	Column1	state	county	city	filing type	filed against	Column2
Row 2	UTLNN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA	UTDBTN
Row 3	107329	CO	ELP		S	Fixture Filing	WOODLAND PARADIS
Row 4	109534	IL	COO		S	Fixture Filing	BIT HOLDINGS THIRTY
Row 5	109546	TV	DAL	Houston	S	Fixture Filing	JOSEY-TRINITY MILLS
Row 6	109581	IL	LAK		S	Fixture Filing	HERBERT J. KENDALL
Row 7	109729	DE	ARL		S	Fixture Filing	JBG/ROSSLYN GATEWAY
Row 8	109801	CA	SNC		C	Fixture Filing	NEXUS EQUITY II LLC
Row 9	109810	TX	SNC		S	Fixture Filing	NEXUS EQUITY II LLC
Row 10	109820	GA	COB		C	Fixture Filing	TOWN CENTER PARTN
Row 11	109834	GA	COB		C	Fixture Filing	TOWN CENTER PARTN
Row 12	109844	NV	CLA		S	Fixture Filing	SCOTT INDUSTRIAL L
Row 13	109864	IL	COO		S	Fixture Filing	LASALLE NATIONAL T
Row 14	109878	FL	PAL		S	Fixture Filing	SGB INVESTMENTS II
Row 15	109886	WA	SNO		C	Fixture Filing	ARTHUR W. & MARIAI
Row 16	109903	WA	SNO		S	Fixture Filing	ARTHUR W. & MARIAI
Row 17	109933	CA	ORA		S	Fixture Filing	CABALLERO BOULEVA
Row 18	109937	CA	SNC		S	Fixture Filing	CARIBBEAN/GENEVA
Row 19	109958	AZ	MAR		C	Fixture Filing	OLD COLONY FINANC
Row 20	109961	FL	INR		S	Fixture Filing	PORT EVERGLADES R

FIGURE 13-THIS SHOWS THE UCC SPREADSHEET ABOVE, MAPPED COLUMN BY COLUMN INTO THE TEMPLATE.

Row to Row Mapping

Clicking a row header in the left side or “Spreadsheet Grid” of the mapping page selects the data in that row for all columns in the spreadsheet.

The row header turns white to show selection. You can then click a row header or column header in the right side or “Template Grid” of the mapping page to map the data in the template.

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
Row 1		state	county	city	filing type	filed against	
Row 2	UTLNN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA	UTDBTN
Row 3	107329	CO	ELP		S	Fixture Filing	WOODLAND PARADISE
Row 4	109534	IL	COO		S	Fixture Filing	BIT HOLDINGS THIRTI
Row 5	109546	TV	DAL	Houston	S	Fixture Filing	JOSEY-TRINITY MILLS
Row 6	109581	IL	LAK		S	Fixture Filing	HERBERT J. KENDALL
Row 7	109729	DE	ARL		S	Fixture Filing	JBG/ROSSLYN GATEW
Row 8	10978000	CA	CLA		S	Fixture Filing	EQUUS LAS VEGAS A
Row 9	109801	CA	SNC		C	Fixture Filing	NEXUS EQUITY II LLC
Row 10	109810	TX	SNC		S	Fixture Filing	NEXUS EQUITY II LLC
Row 11	109820	GA	COB		C	Fixture Filing	TOWN CENTER PARTI
Row 12	109834	GA	COB		C	Fixture Filing	TOWN CENTER PARTI
Row 13	109844	NV	CLA		S	Fixture Filing	SCOTT INDUSTRIAL L
Row 14	109864	IL	COO		S	Fixture Filing	LASALLE NATIONAL T
Row 15	109878	FL	PAL		S	Fixture Filing	SGB INVESTMENTS II
Row 16	109886	WA	SNO		C	Fixture Filing	ARTHUR W. & MARIAI
Row 17	109903	WA	SNO		S	Fixture Filing	ARTHUR W. & MARIAI
Row 18	109933	CA	ORA		S	Fixture Filing	CABALLERO BOULEV
Row 19	109937	CA	SNC		S	Fixture Filing	CARIBBEAN/GENEVA
Row 20	109958	AZ	MAR		C	Fixture Filing	OLD COLONY FINAN

	LOAN NUMBER	SEQ #	STATE	COUNTY	CITY	FILING TYPE	FILE
Row 1							
Row 2							
Row 3	107329	CO	ELP		S	Fixture Filing	WOODL
Row 4							
Row 5							
Row 6							
Row 7							
Row 8							
Row 9							
Row 10							
Row 11							
Row 12							
Row 13							
Row 14							
Row 15							
Row 16							
Row 17							
Row 18							
Row 19							
Row 20							

FIGURE 14-IN THIS EXAMPLE ROW3 IN THE 'SPREADSHEET GRID(SG)' OF THE MAPPING PAGE WAS MAPPED TO ROW 3 OF THE 'TEMPLATE GRID (TG)'. THE VALUE IN ROW 3, COLUMN A, (SG) MAPS TO ROW 3, COLUMN A, (TG), ROW 3, COLUMN B (SG) TO ROW 3, COLUMN B (TG) AND SO ON.

Using Row to Column Mapping to Upload Index Rates and Effective Dates

[Upload New Spreadsheet](#)
[Session Options](#)

Index Rate Template

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
<input type="checkbox"/> Row 1	Index	1D	1M	2M	3M	6M	1Y
<input checked="" type="checkbox"/> Row 2	Date	20131005	20131005	20131005	20131005	20131005	20131005
<input checked="" type="checkbox"/> Row 3	Rate	1.86	2.7	3.77	1.1000000000000001	1.24	1.25

	INDEX CODE	INDEX RATE EFF DATE	INDEX RATE
Row 1			
Row 2			
Row 3			

[Check All](#)
[Uncheck All](#)

[Clear Data](#)
[Save Mapping](#)
[Validate](#)

FIGURE 16-INDEX RATES IDENTIFIED BY EFFECTIVE DATE IN COLUMNS

In Figure 16, the spreadsheet is formatted with the Index Codes in Row 1, the Effective Dates in Row 2, and the Rate in Row 3. The Mapping Tool template organizes the data in rows by Index Code and Effective Date. The easiest way to move the data is to use the Row to Column Formatting.

1. Click Row 1 in the Spreadsheet Grid and the Index Code header in the Template Grid.
2. Click Row 2 in the Spreadsheet Grid and the Index Rate header in the Template Grid.
3. Click Row 3 in the Spreadsheet Grid and the Index Rate Effective Date header in the Template Grid.

The Mapping Tool moved the values correctly: Index in Row 1, Column A from the spreadsheet to Row 1, Column A in the Template Grid, 1D in Row 1, Column B from the spreadsheet to Row 2 Column A in the Template Grid and 1M in Row 1, Column C, to Row 3, Column A in the Template Grid, and so on....

We don't want to upload the field labels so click the Row Header for Row 1 in the Template Grid to remove the data before uploading

[Upload New Spreadsheet](#)
[Session Options](#)

Index Rate Template

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
<input checked="" type="checkbox"/> Row 1	Index	1D	1M	2M	3M	6M	1Y
<input checked="" type="checkbox"/> Row 2	Date	20131005	20131005	20131005	20131005	20131005	20131005
<input checked="" type="checkbox"/> Row 3	Rate	1.86	2.7	3.77	1.1000000000000001	1.24	1.25

	INDEX CODE	INDEX RATE EFF DATE	INDEX RATE
Row 1			
Row 2	1D	20131005	1.86
Row 3	1M	20131005	2.7

FIGURE 17- EACH ROW IN THE SPREADSHEET GRID OF THE MAPPING PAGE IS MAPPED TO THE COLUMNS IN THE INDEX RATE TEMPLATE.

Here is another Index Spreadsheet Uploaded using a Column to Column mapping.

	Column A	Column B	Column C
<input type="checkbox"/> Row 1	Index Code	Effective Date	Rate
<input checked="" type="checkbox"/> Row 2	1D	20131005	1.86
<input checked="" type="checkbox"/> Row 3	1M	20131005	2.70
<input checked="" type="checkbox"/> Row 4	2M	20131005	3.77
<input checked="" type="checkbox"/> Row 5	3M	20131005	1.10
<input checked="" type="checkbox"/> Row 6	6M	20131005	1.24
<input checked="" type="checkbox"/> Row 7	1Y	20131005	1.25
<input checked="" type="checkbox"/> Row 8	LD	20131005	1.1100000000000001
<input checked="" type="checkbox"/> Row 9	AA	20131005	1.04
<input checked="" type="checkbox"/> Row 10	CD	20131005	1.1299999999999999
<input checked="" type="checkbox"/> Row 11	CM	20131005	1.05
<input checked="" type="checkbox"/> Row 12	1T	20131005	1.33
<input checked="" type="checkbox"/> Row 13	2T	20131005	1.89
<input checked="" type="checkbox"/> Row 14	3T	20131005	2.4700000000000002
<input checked="" type="checkbox"/> Row 15	5T	20131005	3.39

	INDEX CODE	INDEX RATE EFF DATE	INDEX RATE
Row 1			
Row 2	1D	20131005	1.86
Row 3	1M	20131005	2.70
Row 4	2M	20131005	3.77
Row 5	3M	20131005	1.10
Row 6	6M	20131005	1.24
Row 7	1Y	20131005	1.25
Row 8	LD	20131005	1.1100000000000001
Row 9	AA	20131005	1.04
Row 10	CD	20131005	1.1299999999999999
Row 11	CM	20131005	1.05
Row 12	1T	20131005	1.33
Row 13	2T	20131005	1.89
Row 14	3T	20131005	2.4700000000000002
Row 15	5T	20131005	3.39

FIGURE 18- THIS VERSION OF AN INDEX UPLOAD SHOWS COLUMN TO COLUMN MAPPING.

Eliminate Transfer of Data

Note that no data transferred to the Index Rate Template in Row 1. This is because the Row 1 Checkbox in the Spreadsheet Grid is unchecked indicating that the Row should not be transferred.

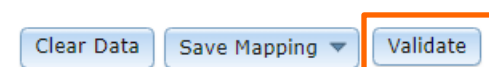
You can eliminate the transfer of any row when transferring columns by clearing the check box for the row.

Clearing Data from the Template Grid

If a Column, Row, or Cell in the Template Grid of the Mapping Page is clicked and no data was selected in the Spreadsheet Grid to transfer, the data in the selection in the Template Grid of the Mapping Page will be removed.

Validate

	C	Fixture
	S	Fixture
	S	Fixture
	S	Fixture
	C	Fixture



Once you have completed your data mapping, the Validate button in the lower right hand corner of the Mapping Page checks the data to be imported from the spreadsheet against the edits required for the data being entered. Clicking the Validate button runs the edits.

- **Data Types** - ensures that fields match basic formatting rules set by the Mapping tool (numerical fields only contain numbers, dates are valid, etc.)
- **Business Rule Violations** - ensures that the data is consistent with the account itself (maturity date comes after start date, fields that are *Yes/No* fields in Strategy can only be a *Yes* or *No*, etc.)

If the program is unable to validate data in the cell because a business rule has been violated or data types are inconsistent with what is required for the field, the template updates with several visual cues.

- If there are errors.
 - the cells that need attention are highlighted in Red
 - View Errors button appears at bottom of page
 - An Error Message appears “Data did not pass validation: business rule violation” or “data type violation”.
- Cells bordered in green represent data to be updated with the mapped data.**
- Cells bordered in black represent new data records.

NOTE:** When updating existing records using the Mapping Tool, if a record being updated includes blank fields from the spreadsheet mapped to the template, the subsequent validation and upload will overwrite any mapped fields in the existing record with the data mapped, including blanks. If you are mapping by row or column, please check your mapped data carefully when updating.

	✓ LOAN NUMBER	✓ SEQ #	✓ STATE	✓ COUNTY	✓ CITY	✓ FILING TYPE	✓ FILE
Row 1							
Row 2							
Row 3	107329	1	CO	ELP		S	Fixture
Row 4	109534	1	IL	COO		S	Fixture
Row 5	109546	1	TV	DAL	Houston	S	Fixture
Row 6	109581	1	IL	LAK		S	Fixture
Row 7	109729	1	DE	ARL		S	Fixture
Row 8	10978000	1	CA	CLA		S	Fixture
Row 9	109801	1	CA	SNC		C	Fixture
Row 10	109810	1	TX	SNC		S	Fixture
Row 11	109820	1	GA	COB		C	Fixture
Row 12	109834	1	GA	COB		C	Fixture
Row 13	109844	1	NV	CLA		S	Fixture
Row 14	109864	1	IL	COO		S	Fixture
Row 15	109878	1	FL	PAL		S	Fixture
Row 16	109886	1	WA	SNO		C	Fixture
Row 17	109903	1	WA	SNO		S	Fixture
Row 18	109933	1	CA	ORA		S	Fixture

✖ Data did not pass validation: business rule violation [View Errors](#) [Clear Data](#) [Save Mapping](#) [Validate](#)

FIGURE 19-AFTER VALIDATION THE TEMPLATE GRID OF THE MAPPING PAGE UPDATES WITH VISUAL CUES.

View Errors Button

The View Errors button brings up the Rule Violations window. This window shows the Row and Column the error appears, the field value and what the violation is.

Rule Violations			
Row	Column	Field Value	Violation
5	C	TV	UTFSTA must exist in PINFO (US)
8	A	10978000	Loan number does not exist in PMASTR
Export Errors to Spreadsheet			

FIGURE 20-RULE VIOLATION WINDOW LISTS OUT ALL THE RULE VIOLATIONS FOUND DURING VALIDATION.

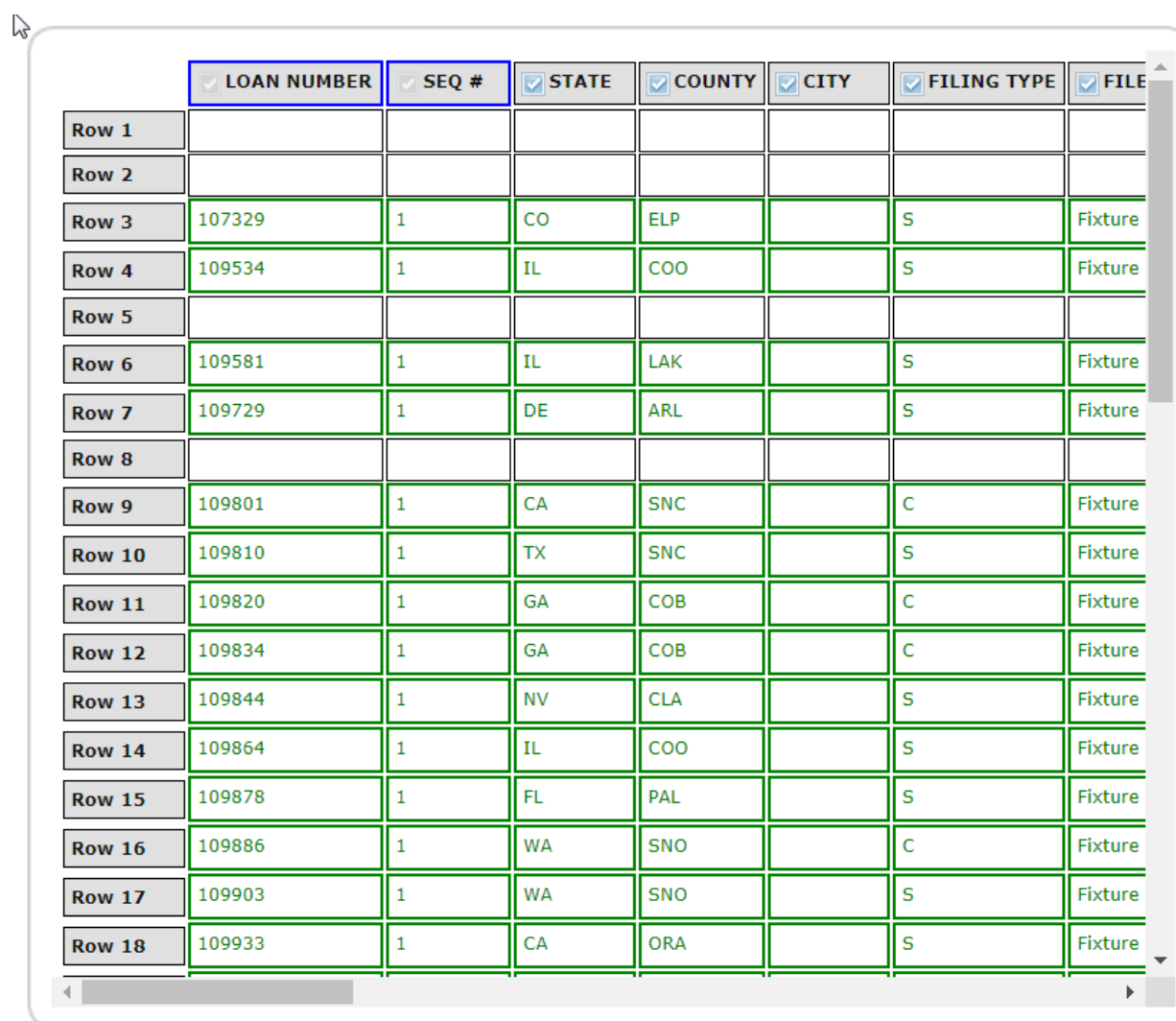
Users have the option of correcting the errors and re validating the data, or in the case where there are multiple errors in a large upload, or errors cannot easily be confirmed and corrected, using the Export Errors to Spreadsheet button provided in the Rule Violation window.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	LOAN NUMBER	SEQ #	STATE	COUNTY	CITY	FILING TYPE	FILED AGAINST	DEBTOR NAME	ORIG REG #	ORIG FILING DATE	CURRENT REG	CURRENT FILING DATE	PROP #	LIEN POSITION
2	109546	1	TV	DAL	Houston	S	Fixture Filing		03-0006359420	10/28/2002	03-0006359420	10/28/2002	1	
3	10978000	1	CA	CLA		S	Fixture Filing		0310560124	04/11/2003	0310560124	04/11/2003	1	
4														
5														

FIGURE 21-EXPORT ERRORS TO SPREADSHEET DOWNLOADS THE RECORD FOR EACH ERROR FOUND.

The Export Errors to Spreadsheet creates a spreadsheet using the selected template and exports the entire record for each Rule Violation found.

Strategy removes the records with errors from the Template Grid of the Mapping Page, and they are no longer available to submit for upload.



	<input checked="" type="checkbox"/> LOAN NUMBER	<input checked="" type="checkbox"/> SEQ #	<input checked="" type="checkbox"/> STATE	<input checked="" type="checkbox"/> COUNTY	<input checked="" type="checkbox"/> CITY	<input checked="" type="checkbox"/> FILING TYPE	<input checked="" type="checkbox"/> FILE
Row 1							
Row 2							
Row 3	107329	1	CO	ELP		S	Fixture
Row 4	109534	1	IL	COO		S	Fixture
Row 5							
Row 6	109581	1	IL	LAK		S	Fixture
Row 7	109729	1	DE	ARL		S	Fixture
Row 8							
Row 9	109801	1	CA	SNC		C	Fixture
Row 10	109810	1	TX	SNC		S	Fixture
Row 11	109820	1	GA	COB		C	Fixture
Row 12	109834	1	GA	COB		C	Fixture
Row 13	109844	1	NV	CLA		S	Fixture
Row 14	109864	1	IL	COO		S	Fixture
Row 15	109878	1	FL	PAL		S	Fixture
Row 16	109886	1	WA	SNO		C	Fixture
Row 17	109903	1	WA	SNO		S	Fixture
Row 18	109933	1	CA	ORA		S	Fixture

FIGURE 22-ROWS 5 AND 8 WERE REMOVED FROM THE MAPPING TEMPLATE WHEN THE EXPORT ERRORS TO SPREADSHEET BUTTON WAS USED.

Errors downloaded to the spreadsheet, can be corrected in the spreadsheet. The users then save the changes and upload the records using the same Mapping Tool template (the spreadsheet is already in the right format for that template) to complete the task.

Select Alternative to Assist with Data Correction

If a Rule Violation is due to a missing value in System Information (PINFO), Strategy provides a Select Alternative option to select the appropriate value.

	✓ LOAN NUMBER	✓ SEQ #	✓ STATE	✓ COUNTY	✓ CITY	✓ FILING TYPE	✓ FILE
Row 1							
Row 2							
Row 3	107329	1	CO	ELP		S	Fixture
Row 4	109534	1	IL	COO		S	Fixture
Row 5	109546	1	TV				Fixture
Row 6	109581	1	IL	IAK		S	Fixture
Row 7	109729	1	DE			S	Fixture
Row 8	10978000	1	CA	CLA		S	Fixture
Row 9	109801	1	CA	SNC		C	Fixture
Row 10	109810	1	TX	SNC		S	Fixture

FIGURE 23 - PINFO VALUES FOR THE DROP DOWN ARE AVAILABLE FROM THE TEMPLATE GRID FOR QUICK CORRECTIONS.

In Figure 23, the 'State' value of 'TV' is rejected. We can click on the Red cell, and use the drop down menu provided to select the correct value. Strategy will accept a code or its associated description as correct in the window. Once all errors have been removed or corrected, click the Validate button again.

	<input checked="" type="checkbox"/> LOAN NUMBER	<input checked="" type="checkbox"/> SEQ #	<input checked="" type="checkbox"/> STATE	<input checked="" type="checkbox"/> COUNTY	<input checked="" type="checkbox"/> CITY	<input checked="" type="checkbox"/> FILING TYPE	<input checked="" type="checkbox"/> FILE
Row 1							
Row 2							
Row 3	107329	1	CO	ELP		S	Fixture
Row 4	109534	1	IL	COO		S	Fixture
Row 5	109546	1	TEXAS	DAL	Houston	S	Fixture
Row 6	109581	1	IL	LAKE		S	Fixture
Row 7	109729	1	DE				Fixture
Row 8	10978000	1	CA				Fixture
Row 9	109801	1	CA				Fixture
Row 10	109810	1	TX				Fixture
Row 11	109820	1	GA				Fixture
Row 12	109834	1	GA				Fixture
Row 13	109844	1	NV				Fixture
Row 14	109864	1	IL				Fixture
Row 15	109878	1	FL				Fixture
Row 16	109886	1	WA				Fixture
Row 17	109903	1	WA				Fixture
Row 18	109933	1	CA				Fixture

Select Alternative...
 NEW HAMPSHIRE AND MASSACHUSETTS
 NORTH CAROLINA
 NORTH DAKOTA
 NORTHWEST TERRITORIES
 NOVA SCOTIA
 NUNAVUT
 OHIO
 OKLAHOMA
 ONTARIO
 OREGON
 PENNSYLVANIA
 PRINCE EDWARD ISLAND
 PUERTO RICO
 QUEBEC
 RHODE ISLAND
 SASKATCHEWAN
 SOUTH CAROLINA
 SOUTH DAKOTA
 TENNESSEE
 TEXAS

FIGURE 24-SELECT ALTERNATIVE WILL ALLOW YOU TO UPDATE SYSTEM INFO VALUES IN THE TEMPLATE.

Submit for Upload

Once data has been successfully validated the users are presented with the Submit to Strategy window.

- Clicking Submit will update and/or add all mapped records. Confirmation appears to the left of the Clear Data button.
- Clicking Cancel does not submit the data to Strategy, a message appears to the left of the Clear Data button.

Submit to Strategy ✕

Data successfully validated! Submit to Strategy?

Green records will be updated, black records will be added.

Submit Cancel

Row 15	109878	1	FL	PAL		S	Fixture
Row 16	109886	1	WA	SNO		C	Fixture
Row 17	109903	1	WA	SNO		S	Fixture
Row 18	109933	1	CA	ORA		S	Fixture

✓ 46 Record(s) successfully exported to Strategy. [Clear Data](#) [Edit UCC 2 Mapping](#) [Validate](#)

FIGURE 25-CLICKING SUBMIT IN THE SUBMIT TO STRATEGY WINDOW EXPORTS THE UPLOADED INFORMATION TO STRATEGY. CONFIRMATION APPEARS TO THE LEFT OF THE CLEAR DATA BUTTON.

Row 15	109878	1	FL	PAL		S	Fixture
Row 16	109886	1	WA	SNO		C	Fixture
Row 17	109903	1	WA	SNO		S	Fixture
Row 18	109933	1	CA	ORA		S	Fixture

✓ Data passed validation but was not submitted to Strategy [Clear Data](#) [Edit UCC 2 Mapping](#) [Validate](#)

FIGURE 26-CLICKING CANCEL IN THE SUBMIT TO STRATEGY WINDOW DOES NOT EXPORT DATA TO STRATEGY, MESSAGE TO THE LEFT OF THE CLEAR DATA BUTTON SIGNIFIES THAT THE DATA VALIDATED CORRECTLY BUT WAS NOT UPLOADED.

Clear Data

The 'Clear Data' button removes all field values mapped to the Template Grid. If you use a saved mapping and you want to remap the data in the Spreadsheet Grid, use the Clear Data button to remove all values from the Template Grid before remapping the data. You can move a single row or column in the Template Grid by clicking the column header in the Template Grid, with there being no active selection in the Spreadsheet Grid.

Save the Mapping for Future Use

Map Tracking

Strategy tracks each data transfer in memory so that the user can create a saved mapping to use with future spreadsheets with the same data and format. MaTi uses two types of tracking: Column level and Cell level.

Column level tracking keeps track of higher level data movement. For example the transfer of Column A on the Spreadsheet Grid is moved to the "Loan Number" column on the Template Grid, this column mapping will be saved in memory so that user can then choose to save this column assignment for future use. Each time the mapping is used Column A will move to the Loan Number column. Cell mapping stores the placement of each individual cell as coordinates.

MaTi makes this distinction to account for a wide range of applications for this product. For example if a Rent Roll mapping is being created, the number of rows may vary greatly for each iteration and therefore a cell mapping may not prove particularly useful as only the cells in the initial mapping will be stored. Column mapping by contrast, when used in the future is not specific enough to know not to include header rows or totals, but will handle any number of rows regardless of the size of the grid for the user to create the initial mapping.

NOTE: MaTi does not save individual cell movements as column assignments as this may lead to conflicts. For example, if at user moves the cell in row 1 column c to the template grid, only the cell assignment will be stored, a column mapping cannot be created from this information.

Saving Your Mapping

Once you have completed your mapping you can save it for future use. Strategy recognizes a spreadsheet's layout by comparing the number of columns as well as the type of data contained within the columns.

If you receive spreadsheets consistently using the same format, users can map the data once and save the mapping and skip the mapping exercise in the future. This is accomplished using the **Save Mapping** button shown below.

UCC Template

Column A Column B Column C Column D Column E Column F Column G

Row 1 state county city filing type filed against

Row 2 UTLLN UTFSTA UTFCDU UTFCY UTTYPE UTFA UTDBTN

Row 3 107329 CO ELP S Fixture Filing WOODLAND PARADIS

Row 4 109534 IL COO S Fixture Filing BIT HOLDINGS THIRI

Row 5 109546 TV DAL Houston S Fixture Filing JOSEY-TRINITY MILLS

Row 6 109581 IL LAK S Fixture Filing HERBERT J. KENDALL

Row 7 109729 DE ARL S Fixture Filing JBG/ROSSLYN GATEW

Row 8 10978000 CA CLA S Fixture Filing EQUUS LAS VEGAS A

Row 9 109801 CA SNC C Fixture Filing NEXUS EQUITY II LLC

Row 10 109810 TX SNC S Fixture Filing NEXUS EQUITY II LLC

Row 11 109820 GA COB C Fixture Filing TOWN CENTER PARTI

Row 12 109834 GA COB C Fixture Filing TOWN CENTER PARTI

Row 13 109844 NV CLA S Fixture Filing SCOTT INDUSTRIAL I

Row 14 109864 IL COO S Fixture Filing LASALLE NATIONAL T

Row 15 109878 FL PAL S Fixture Filing SGB INVESTMENTS II

Row 16 109886 WA SNO C Fixture Filing ARTHUR W. & MARIAI

Row 17 109903 WA SNO S Fixture Filing ARTHUR W. & MARIAI

Row 18 109933 CA ORA S Fixture Filing CABALLERO BOULEV

Row 19 109937 CA SNC S Fixture Filing CARIBBEAN/GENEVA

Row 20 109958 AZ MAR C Fixture Filing OLD COLONY FINANC

LOAN NUMBER SEQ # STATE COUNTY CITY FILING TYPE FILE

Row 1

Row 2

Row 3 107329 1 CO ELP S Fixture

Row 4 109534 1 IL COO S Fixture

Row 5

Row 6 109581 1 IL LAK S Fixture

Row 7 109729 1 DE ARL S Fixture

Row 8

Row 9 109801 1 CA SNC C Fixture

Row 10 109810 1 TX SNC S Fixture

Row 11 109820 1 GA COB C Fixture

Row 12 109834 1 GA COB C Fixture

Row 13 109844 1 NV CLA S Fixture

Row 14 109864 1 IL COO S Fixture

Row 15 109878 1 FL PAL S Fixture

Row 16 109886 1 WA SNO C Fixture

Row 17 109903 1 WA SNO S Fixture

Row 18 109933 1 CA ORA S Fixture

Row 19 109937 1 CA SNC S Fixture

Row 20 109958 1 AZ MAR C Fixture

Check All Uncheck All

This spreadsheet matched a saved format. A mapping record has not been set for this format. Current template selection matches saved value.

Clear Data Save Mapping Validate

Save Column Assignments Save Cell Assignments

FIGURE 27-THE SAVE MAPPING BUTTON PROVIDES TWO OPTIONS. SAVE COLUMN ASSIGNMENT OR SAVE CELL ASSIGNMENT.

- Click on the **Save Mapping** button in the bottom right of the window.
- Click on the **Save Column Assignments** button or the **Save Cell Assignments**, depending on what better fits the mapping you are saving.

Please note that when mapping column assignments, the MaTi will not remove rows like headers or totals, they will have to be deleted manually by unchecking the Row Header in the Spreadsheet grid.

Additionally, when mapping from cell to cell, the exact cell to cell mapping is saved. If you are using the same mapping for spreadsheets that contain additional rows or columns, information in the additional rows or columns are not mapped to the template.

Uploading a Spreadsheet Previously Mapped

As noted earlier, Strategy recognizes a spreadsheet's layout by comparing the number of columns as well as the type of data contained within the columns. When you upload a spreadsheet with the same type of information as a saved mapping you can select the Mapping from the Select Saved Map drop down.

Import Spreadsheet

Choose Files UCC

Upload

Select Saved Map...

Begin to Upload files:
 UCC Upload.xlsx, 18909
 Uploaded file UCC Upload.xlsx to
 /opt/IBM/WebSphere/AppServer/profile
 s/AppSrv11/installedApps/localhostNod
 e11Cell/MWS_MTEAR_19D.1.0iAPI_WA
 S8.5.5.ear/MWS_MT.war/uploads/UCC
 Upload.xlsxUpload complete Begin to

☒ Upload Spreadsheet
☐ Export Spreadsheet

Load Interactively Load in Batch

FIGURE 28-USE THE SELECT SAVED MAPPING TO CHOOSE A SAVED MAPPING

Updating an Existing Saved Mapping

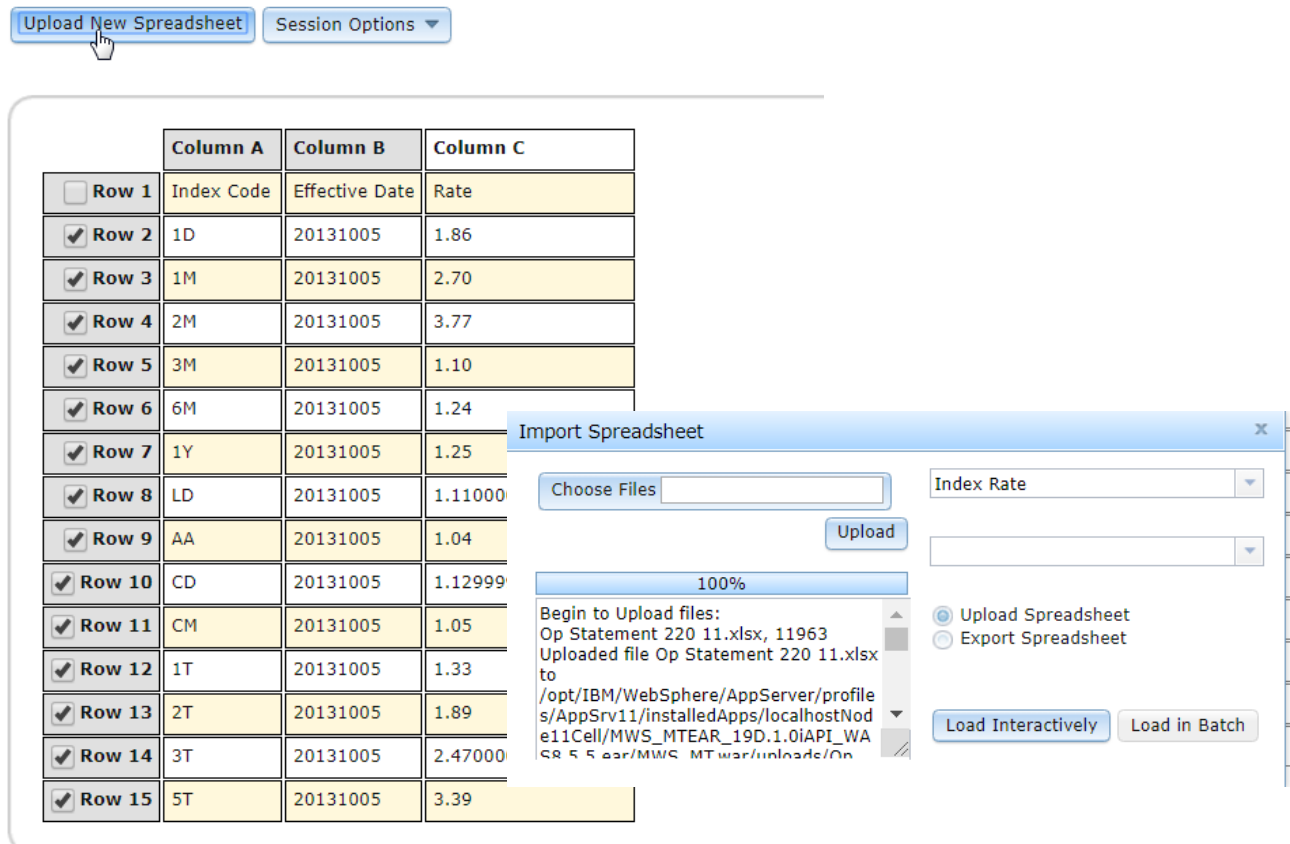
If you are working with a Mapping previously saved the Save Mapping button will read Edit <Map Name>. The following options will be available based on the following conditions.

Condition	Button Reads...	Options Available from the Save/Edit button	Action
Mapping done without using a saved mapping.	Save Mapping Save Mapping ▾	• Save Column Assignments	• Mapping saved using column by column mapping
		• Save Cell Assignments	• Mapping saved using cell by cell mapping
Save Mapping Selected, user is not the owner	Edit <MAP NAME> Edit UCC 2 Mapping ▾	• Update Assignments (button disabled)	• Not available, user can not alter a mapping they do not own.
		• Save New Column Assignments	• New mapping saved using column by column mapping
		• Save New Cell Assignments	• New mapping saved using a cell by cell mapping
Saved Mapping Selected, user is owner	Edit <MAP NAME> Edit UCC 2 Mapping ▾	• Update Assignments	• Mapping saved with any changes to previous assignments
		• Save New Column Assignments	• New mapping saved using column by column mapping
		• Save New Cell Assignments	• New mapping saved using a cell by cell mapping

Other Mapping Page Features

Upload New Spreadsheet

This button in the upper left hand corner of the Mapping Page allows users to select another spreadsheet to work with in the Mapping Page. Clicking the button opens the Import Spreadsheet window. Click in the Choose File field to select a new spreadsheet to work with.



The screenshot shows the Mapping Page interface. At the top, there are two buttons: "Upload New Spreadsheet" and "Session Options". A mouse cursor is pointing at the "Upload New Spreadsheet" button. Below the buttons is a table with columns "Column A", "Column B", and "Column C". The table contains 15 rows, with the first row being the header and the remaining 14 rows being data rows. The data rows are numbered "Row 1" through "Row 15". The "Index Code" column contains values like "1D", "1M", "2M", "3M", "6M", "1Y", "LD", "AA", "CD", "CM", "1T", "2T", "3T", "5T". The "Effective Date" column contains the value "20131005" for all rows. The "Rate" column contains values like "1.86", "2.70", "3.77", "1.10", "1.24", "1.25", "1.11000", "1.04", "1.12999", "1.05", "1.33", "1.89", "2.47000", "3.39".

Overlaid on the bottom right of the table is the "Import Spreadsheet" dialog box. It has a "Choose Files" button, an "Index Rate" dropdown menu, and an "Upload" button. Below these is a progress bar showing "100%". The dialog box also contains a text area with the following text: "Begin to Upload files: Op Statement 220 11.xlsx, 11963 Uploaded file Op Statement 220 11.xlsx to /opt/IBM/WebSphere/AppServer/profile s/AppSrv11/installedApps/localhostNod e11Cell/MWS_MTEAR_19D.1.0iAPI_WA SR 5 5 epr/MWS_MTEAR/unloads/On". At the bottom of the dialog box, there are two radio buttons: "Upload Spreadsheet" (selected) and "Export Spreadsheet". There are also two buttons: "Load Interactively" and "Load in Batch".

FIGURE 29-THE UPLOAD NEW SPREADSHEET ALLOWS USERS TO SELECT ANOTHER SPREADSHEET TO WORK WITH.

Upload New Spreadsheet

Session Options

UCC Template

	Column A	Column B	Column C	Column D	Column E	Column F	Column G
<input type="checkbox"/> Row 1		state	county	city	filing type	filed against	
<input checked="" type="checkbox"/> Row 2	UTLNN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA	UTDBTN
<input checked="" type="checkbox"/> Row 3	107329	CO	ELP		S	Fixture Filing	WOODLAND PARADIS
<input checked="" type="checkbox"/> Row 4	109534	IL	COO		S	Fixture Filing	BIT HOLDINGS THIRT
<input checked="" type="checkbox"/> Row 5	109546	TV	DAL	Houston	S	Fixture Filing	JOSEY-TRINITY MILLS
<input checked="" type="checkbox"/> Row 6	109581	IL	LAK		S	Fixture Filing	HERBERT J. KENDALL
<input checked="" type="checkbox"/> Row 7	109729	DE	ARL		S	Fixture Filing	JBG/ROSSLYN GATEW
<input checked="" type="checkbox"/> Row 8	10978000	CA	CLA		S	Fixture Filing	EQUUS LAS VEGAS A
<input checked="" type="checkbox"/> Row 9	109801	CA	SNC		C	Fixture Filing	NEXUS EQUITY II LLC
<input checked="" type="checkbox"/> Row 10	109810	TX	SNC		S	Fixture Filing	NEXUS EQUITY II LLC
<input checked="" type="checkbox"/> Row 11	109820	GA	COB		C	Fixture Filing	TOWN CENTER PART
<input checked="" type="checkbox"/> Row 12	109834	GA	COB		C	Fixture Filing	TOWN CENTER PART
<input checked="" type="checkbox"/> Row 13	109844	NV	CLA		S	Fixture Filing	SCOTT INDUSTRIAL I
<input checked="" type="checkbox"/> Row 14	109864	IL	COO		S	Fixture Filing	LASALLE NATIONAL T
<input checked="" type="checkbox"/> Row 15	109878	FL	PAL		S	Fixture Filing	SGB INVESTMENTS II
<input checked="" type="checkbox"/> Row 16	109886	WA	SNO		C	Fixture Filing	ARTHUR W. & MARIAI
<input checked="" type="checkbox"/> Row 17	109903	WA	SNO		S	Fixture Filing	ARTHUR W. & MARIAI
<input checked="" type="checkbox"/> Row 18	109933	CA	ORA		S	Fixture Filing	CABALLERO BOULEV
<input checked="" type="checkbox"/> Row 19	109937	CA	SNC		S	Fixture Filing	CARIBBEAN/GENEVA
<input checked="" type="checkbox"/> Row 20	109958	AZ	MAR		C	Fixture Filing	OLD COLONY FINANC

	LOAN NUMBER	SEQ #	STATE	COUNTY	CITY	FILING TYPE	FILE
Row 1							
Row 2	UTLNN	UTLIEN	UTFSTA	UTFCOU	UTFCTY	UTTYPE	UTFA
Row 3	107329	1	CO	ELP		S	Fixture
Row 4	109534	1	IL	COO		S	Fixture
Row 5	109546	1	TV	DAL	Houston	S	Fixture
Row 6	109581	1	IL	LAK		S	Fixture
Row 7	109729	1	DE	ARL		S	Fixture
Row 8	10978000	1	CA	CLA		S	Fixture
Row 9	109801	1	CA	SNC		C	Fixture
Row 10	109810	1	TX	SNC		S	Fixture
Row 11	109820	1	GA	COB		C	Fixture
Row 12	109834	1	GA	COB		C	Fixture
Row 13	109844	1	NV	CLA		S	Fixture
Row 14	109864	1	IL	COO		S	Fixture
Row 15	109878	1	FL	PAL		S	Fixture
Row 16	109886	1	WA	SNO		C	Fixture
Row 17	109903	1	WA	SNO		S	Fixture
Row 18	109933	1	CA	ORA		S	Fixture
Row 19	109937	1	CA	SNC		S	Fixture
Row 20	109958	1	AZ	MAR		C	Fixture

Check All

Uncheck All

This spreadsheet matched a saved format. Current mapping selection, UCC 2 Mapping, matches saved value. Current template selection matches saved value.

Clear Data

Edit UCC 2 Mapping

Validate

This spreadsheet matched a saved format. Current mapping selection, UCC 2 Mapping, matches saved value. Current template selection matches saved value.

FIGURE 30-WHEN SELECTING A SAVED MAPPING - UPON ENTRY TO THE MAPPING PAGE, THE TEMPLATE GRID IS PREFILLED WITH THE DATA BASED ON THE SAVED MAPPING DATA. A MESSAGE AT THE BOTTOM SAYS THAT THE SPREADSHEET MATCHED A SAVED MAPPING, WHAT THE CURRENT MAPPING SELECTION.

If you load a spreadsheet to a template but do not select a Mapping, MaTi will let you know that the spreadsheet uploaded matched a saved format. Users can use the Upload New Spreadsheet to select a Saved Mapping instead of mapping the data by hand.

This spreadsheet matched a saved format. A mapping record has not been set for this format. Current template selection matches saved value.

Session Options

The **Session Options** button displays a dropdown menu that provides additional options, which allow the user to work with the spreadsheet data in a variety of ways.

Upload New Spreadsheet Session Options ▼

	Column A	Column B
<input type="checkbox"/> Row 1	BBBNKDAT	
<input checked="" type="checkbox"/> Row 2	12/01/2020	
<input checked="" type="checkbox"/> Row 3	12/02/2020	
<input checked="" type="checkbox"/> Row 4	12/03/2020	

Check All Uncheck All

Run Day End

Automatic Collateral Search

☒ Enabled
☐ Disabled

File Set Selection

☐ Day End
☒ Real-time

Sheet Selection

Sheet1 ▼

Mapping Selection

▼

Automatic Collateral Search.

For the templates where the data is applicable to a property on a loan, the Mapping Tool can automatically search for the collateral associated with the loan.

This functionality is enabled by default, but can be turned off by clicking the **Session Options** drop-down menu in the upper left corner of the window.

When Automatic Collateral Search is Enabled, the **Collateral Name** column will automatically fill when the **Loan Number** is entered into the row as shown in the following *Figure*.

	LOAN NUMBER	PROPERTY NUMBER	COLLATERAL NAME	TENANT NAME	LESSEE NAME	TER
Row 1	500000002	1	Marketplace at Hilltop	Arthur Anderson	25000	436
Row 2	500000005	1	Carlyle Place	Touche Ross	10000	162
Row 3			Carlyle Place			
Row 4			Aynsley Place			
Row 5			Billerica Mall			
Row 6			Gloucester Executive Suites			
Row 7			Natick Mall			
Row 7			Natick Mall			

If more than one **Collateral** exists for the property, the dropdown menu will allow the appropriate **Collateral** to be selected.

File Set Selection

Users have the option to submit the uploaded information to Strategy real-time or in day-end. If the user wishes to run the submit during day-end, they would go to the 'Session Options' button and click the radio button for 'Day End' prior to validating data. When the Submit to Strategy window appears and the user clicks 'Submit', the data is copied to work files identical to the files being updated. The data will be moved from the work files to the actual files when the day-end programs run.

Sheet Selection.

If the uploaded spreadsheet contains multiple sheets, users can select the spreadsheet from the *Session Options* dropdown menu.

Mapping Selection

Users can use the Mapping Selection drop down to select a previously saved mapping and the Mapping Tool will prefill or refill the Template Grid of the Mapping Page using the selected mapping.

Session Options ▾

Run Day End

Automatic Collateral Search

☒ Enabled
☐ Disabled

File Set Selection

☐ Day End
☒ Real-time

Sheet Selection

Sheet1 ▾

Sheet1
Sheet2
Sheet3

FIGURE 32 - SELECT THE APPROPRIATE SHEET WITHIN THE CHOSEN SPREADSHEET USING THE SESSION OPTIONS, SHEET SELECTION DROP DOWN.

Session Options ▾

Run Day End

Automatic Collateral Search

☒ Enabled
☐ Disabled

File Set Selection

☐ Day End
☒ Real-time

Sheet Selection

Sheet1 ▾

Mapping Selection

Inspection Data ▾

FIGURE 31-SELECT A NEW OR DIFFERENT PREDEFINED MAPPING USING THE MAPPING SELECTION PROVIDED ON THE SESSIONS OPTION MENU.

System Administration

Security

Security for the Mapping Tool is maintained through the Strategy application.

Use the Strategy Tools menu to access Security Maintenance.

Tools > Maintenance > Security > Security Maintenance.

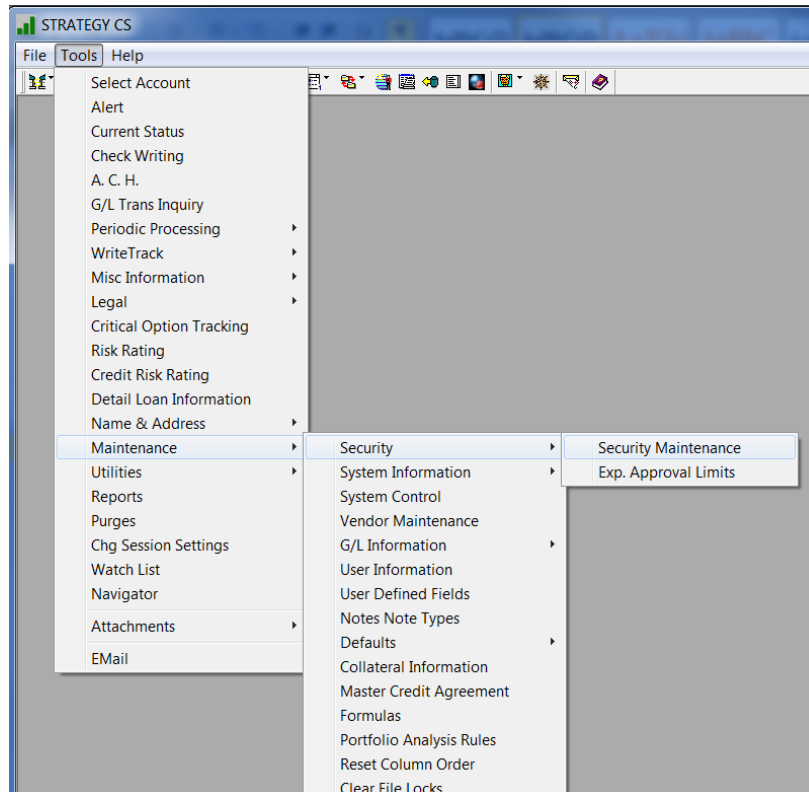


FIGURE 33- STRATEGY TOOLS MENU - USE TO ACCESS SECURITY MAINTENANCE

Selecting Security Maintenance opens the Strategy Security Setup window.

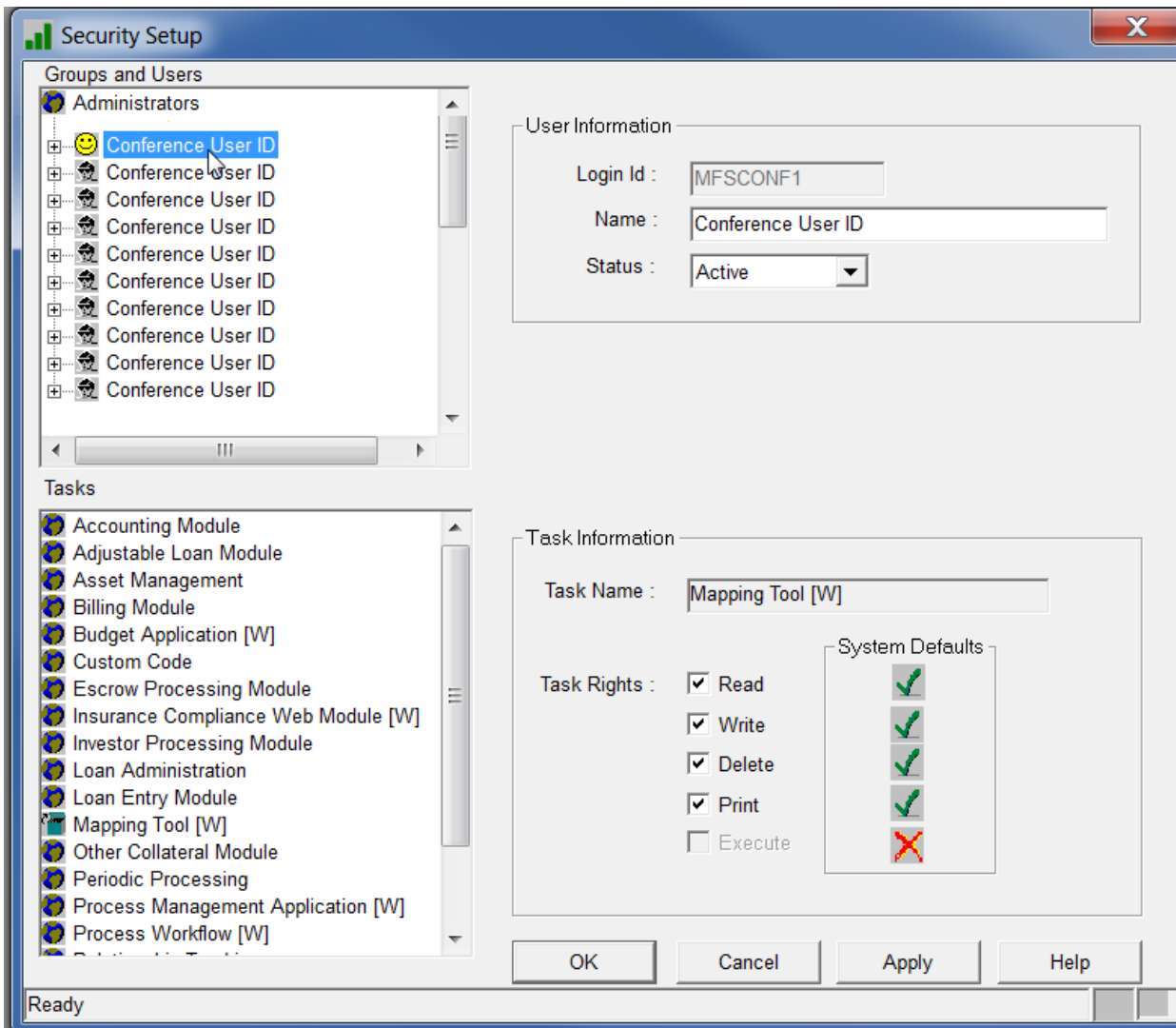


FIGURE 34-STRATEGY SECURITY SETUP WINDOW

Select the appropriate User Group or User

Select the user or user group you are assigning Mapping Tool rights. The active user will change to a Smiley Face Icon. If assigning or changing rights at the Group level you will be prompted to instruct Strategy on how or if security for the users in the group is updated.

Applying Security to use Mapping Tool (MaTi)

Mapping Tool appears as its own task group about two-thirds down the list of task groups, with no task groups expanded. (A Task group is represented by the globe icon when inactive, and as a green open box when active and expanded). Double clicking displays all the available Mapping Tool templates.

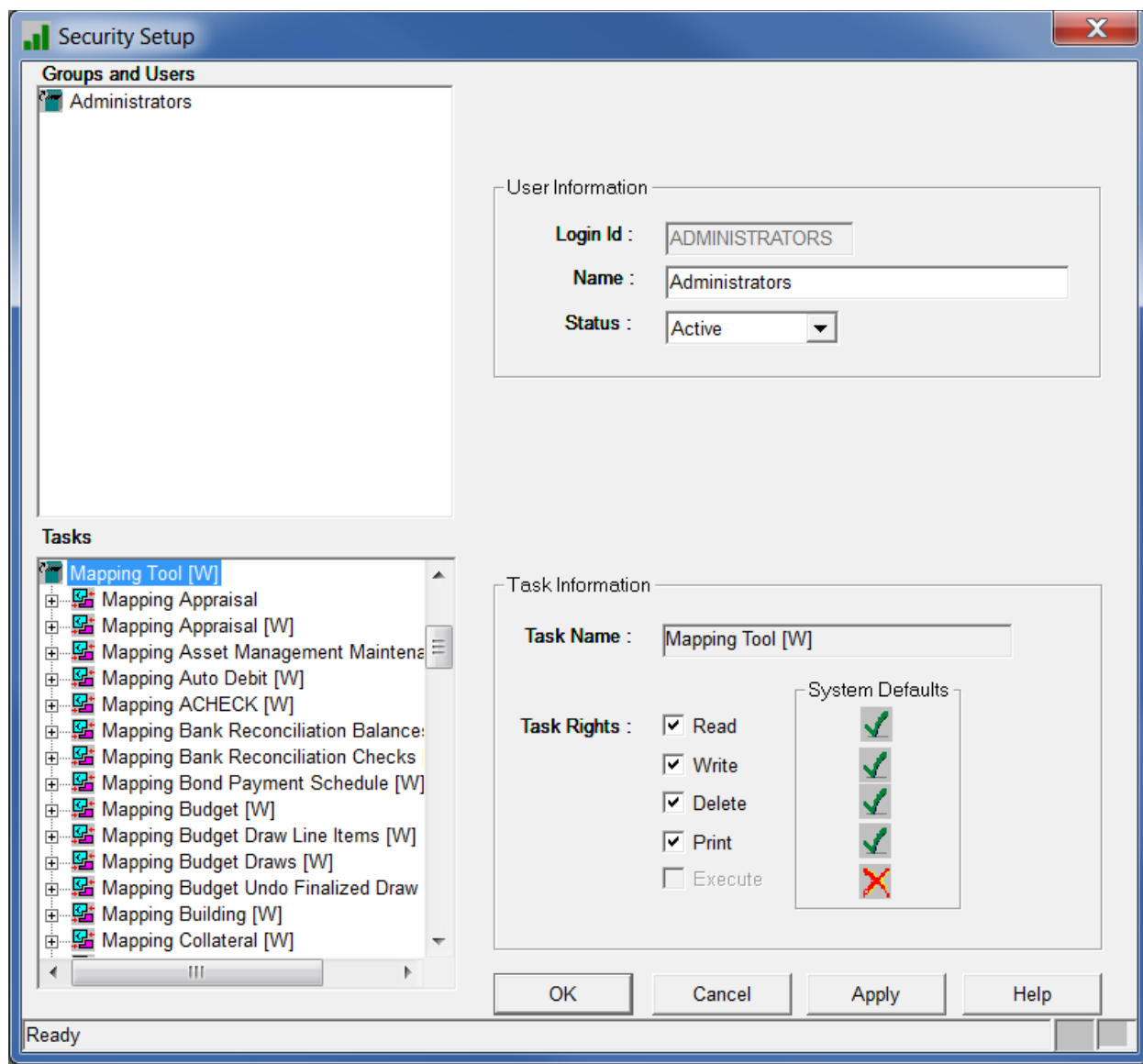


FIGURE 35-MAPPING TOOL [W] SECURITY EXPANDED SO SHOW TEMPLATE SECURITY.

Users must have access to the Mapping Tool task (150000), Mapping Tool Main (150200), and the selected template to update information in the database.

Default Security for Mapping Tool, Mapping Tool – Main, and each Mapping Tool template is Read, Write, Delete, Print.

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Templates Available at Release 20

Templates shown in *orange italics* are new in Release 20

Template Name	Insert (I)/ Update (U)	Files Updated by Template
<i>ACHECK Maintenance</i>	<i>U</i>	<i>PACHECK</i>
Additional MCA Info	U	PMCA2
Advance Tracking	U	PPSAFMTR
Advances	U	PPSAADV
Appraisal	U	PCAPPRAL PCAPPRAL2
<i>Bank Balance from Bank</i>	<i>U</i>	<i>PBANKBAL</i>
Bond Payment Schedule	U	PBPMTSCH
Budget	U	PBLINEITEM PBUDGET
Budget Draw Line Items	U	PDLINEID
Budget Draws	U	PBDRAWS PDLINEID
Budget Undo Finalized Draw	U	PBDRAWS
Building	U	PCBLDG PCBLDGCVR
Company Name Wiring Instructions	U	PNAMEWIRE
Credit Risk Rating	U	PBACCR
Critical Options	U	PCALL
DDA General Release	U	PBDDA

Template Name	Insert (I)/ Update (U)	Files Updated by Template
Deal Initialization	U	PPSAANXA
Deal/Investor Names	U	PPSADIN
Deal/Investor Vendor	U	PPASDIV PPSADIV PPSAIDV
Deferred Revenue	U	PDREV
Detailed Loan Info	U	PDTLN
Escrow Analysis Dates	U	PMASSTR PMASSTR5
<i>Financial Statements API</i>	<i>U</i>	POCCUPA POPDTLS POPMST
Financial Statements Web	U	POCCUPA POPDTLS POPMST
<i>Forbearance</i>	<i>U</i>	PMASSTR
Historical Loan Modification	U	PIRPXHLMLL
<i>HUD Section 8</i>	<i>U</i>	PHUDSEC8
<i>Incoming Wires</i>	<i>U</i>	PWIREIN
Index Rate	U	PINDEX
Inspection Asset	U	PINSPA
Inspection Asset Detail	U	PINDTLA

Template Name	Insert (I)/ Update (U)	Files Updated by Template
Insurance	U	PINSCV POESC
Insurance Agents and Companies	U	PINSCO
Interest Items	U	PINIM
Investor DDA	U	PINVES
Investor GL Accounts	U	PGLAC PINVES
Investor Master	U	PIMST
<i>Investor Master - GNMA Additional</i>	<i>U</i>	<i>PIMSTADL</i>
Investor Master Loan Level	U	PIMST PPSAIM
Investor Reporting Property	U	PPSAPROP
IO Strip Fee	U	PIOSTRP
IO Strip Fee Investor	U	PINVIOSTRP
IOR Rate	U	PIOEPL
IRP Loan Numbers	U	PIRPXRLOAN
Legal Documents	U	PLEGALD
Lien	U	PCLIEN
<i>Loan Entry All (Automated)</i> <i>Use with Loan Entry Spreadsheet</i>	<i>U</i>	<i>N Files</i>
Loan Entry Accrual	U	NACCRU
Loan Entry Adjustable Information	U	

Template Name	Insert (I)/ Update (U)	Files Updated by Template
		NARM
Loan Entry Balance	U	NRBL
Loan Entry Coverage Endorsements	U	NINSEND
Loan Entry Coverages	U	NINSCV
Loan Entry Deferred Revenue	U	NDREV
Loan Entry Insurance	U	NOESC
Loan Entry Investor Master	U	NIMST
Loan Entry Line of Insurance	U	NINSLIN
Loan Entry Master Part 1	U	NMASTR
Loan Entry Master Part 2	U	NMASTR
Loan Entry Master Part 3	U	NMASTR
Loan Entry Name and Address	U	NCIF
Loan Entry Property	U	NPROP
Loan Entry Reserves	U	NOESC NRBL
Loan Entry Reserves/Balance	U	NOESC NRBL
Loan Entry Tax	U	NTXDSC
Loan Master 2	U	PMAST2
Loan Master General Release	U	PMASTR
Loan Name	U	PCIF
MCA Information	U	

Template Name	Insert (I)/ Update (U)	Files Updated by Template
		PMCAIMST
Miscellaneous	U	PAAMISC
Miscellaneous 2	U	PAAMSC
Miscellaneous 3	U	PAAMISC3
Miscellaneous Other Vendors	U	PMSCVND
Name Address Role	U	PADDRESS PANAME PNAMADD PNAME PROLELOAN
Name and Address	U	PADDRESS PNAME PROLENAME
Occupancy Asset	U	POCCUPA
Outgoing Wire Fed Ref	U	PWIRE
<i>Pending Adjustable Loan Changes</i>	<i>U</i>	<i>PARMX</i>
Pending Master File Changes	U	PXMAST
Pending Rate Changes	U	PCHANGE PCHGINV
PIMST Min Field	U	PIMST PPSAIM
PIMST Min Field 2	U	PIMST PPSAIM
Portfolio Registration Dates	U	PPSAPRTFRD
Pre Authorized Transfers	U	

Template Name	Insert (I)/ Update (U)	Files Updated by Template
		PAUTPAYR
Prepayment Premiums	U	PPREPAY
Process Initialization From Report	U	PPMP
Property	U	PCCOLLCRE
Property Allocation	U	PPROP
Property Asset	U	PPROPA
<i>Rate Cap</i>	<i>U</i>	<i>PRACAMO</i>
Rent Roll Header Info Wizard	U	PLEASEA PRROLL PRROLLW
Reserve IOR	U	POESC
Reserves	U	PRBL
Roles For 3rd Party Names	U	PROLE3RD
Servicer Code Change	U	PMASSTR
Sub Servicer Interest Basis	U	PMASSTR4
System Information General Release	U	PINFO
Tax	U	PTAXDLQ PTXDSC
Tickler	U	PTIKLR
Transfer To/From Special Servicing	U	PPSATFER
UCC	U	PUCCT
Wiring Instruction	U	

Template Name	Insert (I)/ Update (U)	Files Updated by Template
		P3RDWIRE