Pages

The Pages selection is used to enter the fields needed to design a new page for a document or to make changes on an existing page/document on the system. Designing the individual pages is the first step in creating a document to be used on the system. (**Note:** All pages need to be made into a document even if just one page. The exception to this is the "receipt" page type for laser receipt backgrounds. Only the page needs to be designed.) The maximum number of pages allowed on the system at one time is 999.

After making the selection, the system displays the pages currently on the system.

System Settings - Pages

NAME	ID
1 Muskogee Welcome Letter	117
15292 pg2	677
15293 pg1	676
15293 pg3	678
1STC014 Mem App & Agree	600
1STC014p2 Taxpayer Ident & BkW	602
1STC071 Elec Serv Agree p1	603
1STC071 Elec Serv Agree p2	604
1STC071 Elec Serv Agree p3	605
1STC14B Comm Mem App & Agree	615
1STC14B2 Taxpayer Ident & BkWt	599
1STCT44A Acct Disc Rate Supp	606
1STT44B1 Agree & Disc p1	607
1STT44B2 Agree & Disc p2	608
1STT44B3 Agree & Disc p3	609
1STT44B4 Agree & Disc p4	610
1STT44B5 Agree & Disc p5	611
1STT44B6 Agree & Disc p6	612
1STT44B7 Agree & Disc p7	613
1STT44B8 Agree & Disc p8	614
1STT44TSA Truth in Savings	619
1Test	146
82045 Fond Du Lac p 3	453
82045 Fond Du Lac p1	451
82045 Fond du Lac p2	452

Figure 1

This window can be used to create a new page, make changes to an existing page or delete a page that is no longer used.

Add Page

To add a new page, click on the Add icon on the ribbon.

Figure 2

To create a new blank page, enter the information and make selections from the drop down lists, when applicable.

Name: Enter a descriptive name for the new page being created.

Type: Select the type of page being created. The selections are:

Address Change ***	Loan Document
Adverse Action ***	Loan Extension
ARM Initial Notice ***	Membership ***
ARM Rate Change Notice ***	Notice of Right to Cancel
Arta (third party software) ***	Open End Plan ***
Certificate ***	Receipts ***
Collection (notice) ***	Safe Deposit Box (Form) ***
Courtesy Pay ***	Safe Deposit Box Notice ***
Debt Protection ***	Stop Payment ***
Loan Application	Subsequent Action ***

*** Laser format only.

Format: Select the appropriate format for this page for printing. The options for this field are:
> Dot Matrix **
> Laser

**Note: Dot Matrix formats (for Okidata printers) are only available for new pages for the following types:

Loan Document	Loan Application
Loan Extension	Notice of Right to Cancel

The **Length and Lines per Inch** fields are for **Dot Matrix** forms only.

Length: Enter the appropriate length of the form in inches.

Lines per Inch: 6 lines per inch
> 8 lines per inch

To add new fields to be included with the page, click on the **green plus sign** on the right side of the window. The system displays.
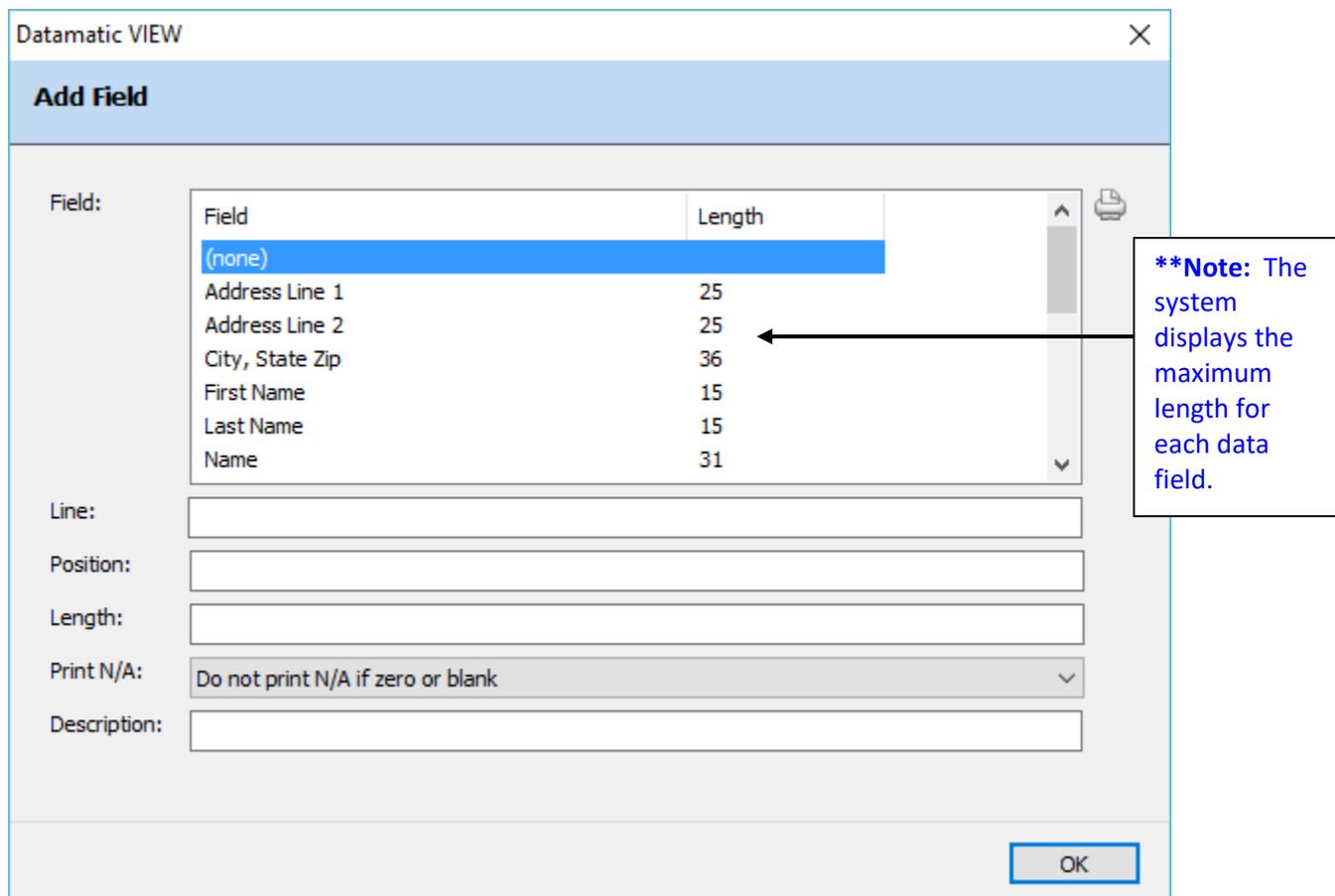

**Note: The system displays the maximum length for each data field.

Figure 3

All of the available fields for the "Page Type" selected will be listed in the **"Field"** section. Different "Page Types" will display different fields that can be used. Use the up and down arrow keys or the scroll

bar to scroll through the options. **Use a ruler to measure the page for the Line Number and the starting Position for each field required. Dot Matrix formats use either 6 or 8 lines per inch vertically and 10 characters per inch horizontally. Laser formats use 300 positions per inch both vertically and horizontally.** After selecting a data field, enter the following information:

Line: Enter the Line number (vertically) for the information to be printed.

Position: Enter the starting Position number (horizontally) for the information to be printed.

Length: Enter the Length (number of possible characters) of the field being used.

Print N/A: Enter the appropriate value for this option. The value selected will dictate whether or not N/A (not applicable) prints in place of a field. If there is not a printed output value, it will print either nothing or N/A depending on the option selected.

The selections are: Do not print N/A if zero or blank
                        Print N/A if zero or blank

   If **"Do not print N/A if zero or blank"** is selected for this field, the output value will be "blank", if no data was entered in the loan document setup.

   Example: For example, some loans may have a Filing Fee and some may not. When no Filing Fee amount is entered on the loan document window, nothing will print in the space indicated by the Position and Line for the Filing Fee data field.

   If **"Print N/A if zero or blank"** is selected for this field, N/A will print if the printed output value is blank.

   Example: For example, some loans may have a Filing Fee and some may not. When no Filing Fee is entered in the loan document window, N/A will automatically print in the space indicated by the Position and Line for the Filing Fee data field.

Description: This is used to add small amounts of additional information that are not on the form itself. Select "none" for the data field and enter the description to be printed on the document in this space. The description entered will print all of the time.

   Example: If an "X" is to be placed in a box every time the form prints then select "none" for the data field. An "X" would be entered in the Description field. This would cause an "X" to be printed in the start position and line number indicated.

   Example: If the words "$15.00 Late Fee" are to be printed every time the form prints then select "none" for the data field. The words "$15.00 Late Fee" would be entered in the Description field. This would cause "$15.00 Late Fee" to be printed in the start position and line number indicated.

For the Credit Union Defined fields, enter the data field (Credit Union Defined Field 1, Credit Union Defined Field 2, etc.). The system will print the information entered on the User Defined window in Loan Paper. A description can be entered in the Description field for reference only, if desired. Select OK, when finished entering the information for the field.

The system displays the information for the mapped data field.

Figure 4

To add more fields, click on the **green plus sign** on the right side of the window. Add the information for the next field in the same manner as the first field was added.

> **TIPS:** A faster and easier way to add numerous fields to a page is to only fill in one field when initially adding the page (or none) then use the "Edit Page" selection to add the remaining fields. Right click on the page then select "Edit Page" from the drop down list.
>
> A "Dot Matrix" form requires that at least one field be added when adding a new page. A "Laser" form does not require a field to be added when adding a new page. This is by design.

> If changes need to be made to a field that was already added, highlight the field and press enter or double click on the field. A window will be displayed to make the changes. Select OK, when finished with the changes.

The system displays.

Figure 5

Continue adding the fields in the same manner until all of the fields have been entered **OR** use the "Edit Page" selection to add the remaining fields as described in the first TIP on the previous page.

When all of the fields have been added, or after adding one of the fields, select the **Save** button. The new page is now displayed on the Pages window as the next available page number.

Right click on one of the page numbers under [Main Ribbon > System Settings > Pages] and the system displays.
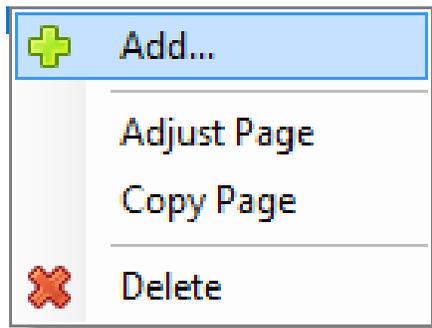
Add Page - This is used to add a new page to the system.

Adjust Page - This is used to adjust <u>all</u> of the existing lines of print fields for a specific page in the direction selected and by the number of lines or positions entered in the adjustment field.
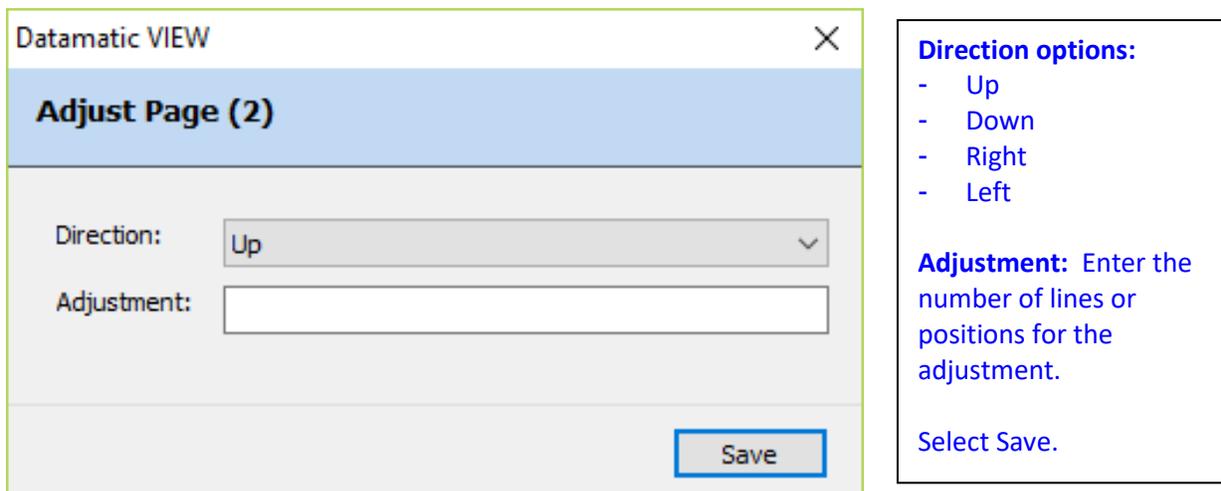

Direction options:
- Up
- Down
- Right
- Left

Adjustment: Enter the number of lines or positions for the adjustment.

Select Save.

Figure 6

Copy Page - This is used to copy an existing page to a new page being added under [Main Ribbon > System Settings > Pages]. This can be useful when a new page being added is exactly like or similar to an existing page on the system. The data fields are carried forward to the new page. ****Note:** The "Copy Page" option is only for laser forms.

After selecting "Copy Page", the page is copied and is titled "Copy of xxxxxxxxxxx". The system also assigns the next available page number. The copied page can be edited, as well as, a new page "Name" can be entered.

Delete Page - This is used to delete a page that is no longer needed. After selecting a page to be removed, a window is displayed asking "Are you sure you want to remove 'xxxxxxxxxxxxx'?". Select the appropriate answer of "yes" or "no".

Import instructions

To import definitions that have been previously exported in order to create a new page, select the **"Import"** link in the bottom left corner of the window.

The system imports the Name, Laser Format and mapped fields to the new page being created. See example below.

Figure 7

**Note: If the page is being imported, the exported page can be put in the Datamatic folder on C:Drive (C:\Datamatic) or another directory chosen by the credit union.

Also, the import page selection can only be used for laser forms. For Dot Matrix users, the selection of new page will need to be used.

If applicable, change the Name for the new page. Then select the appropriate Type for the new page. If changes need to be made to the mapped fields, make the appropriate changes. Select the Save button, when finished.

After selecting an existing page **(Laser)** to make changes, the system displays.

Note: The "Export Page" button is used to export the definitions so that they can be imported (see Figure 2) to a new page. The exported definitions will be placed in the Datamatic folder on C:Drive. (C:\Datamatic.)
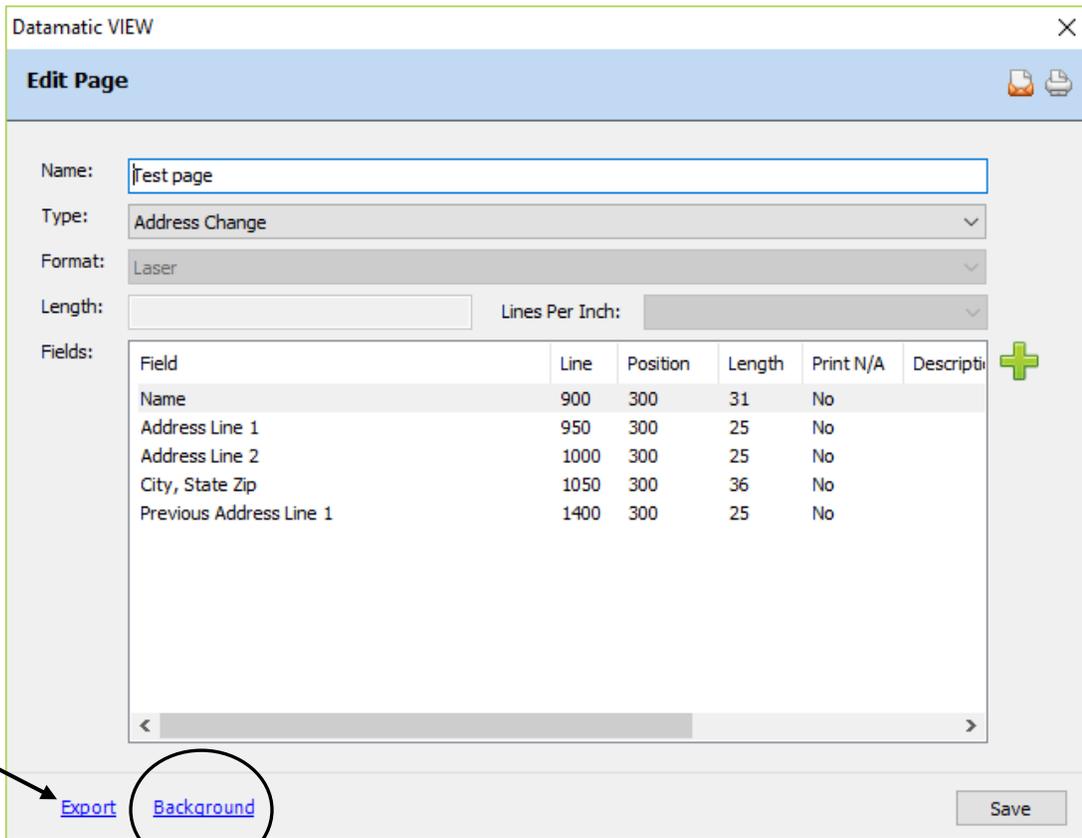
Datamatic VIEW						×

Edit Page

Name: Test page

Type: Address Change

Format: Laser

Length: _____ Lines Per Inch: _____

Fields:

Field	Line	Position	Length	Print N/A	Descripti
Name	900	300	31	No	
Address Line 1	950	300	25	No	
Address Line 2	1000	300	25	No	
City, State Zip	1050	300	36	No	
Previous Address Line 1	1400	300	25	No	

Export   Background   Save

Figure 8

To "Edit" an existing field, highlight the field to make the changes and press enter or double click on the field.

The **"Background"** button allows the credit union to import the PCL background for the laser document into VIEW. Prior to using this import feature, the laser document background must first be received from the third party vendor and on the PC. See pages 11 - 13 for details on importing the background.

Documents supported for importing: Microsoft Word - "Print to File" documents
                                                                      Adobe Acrobat
                                                                      CUNA and CU League forms**

Contact Customer Support before purchasing CUNA Loanliner or CU League forms.

Note: Recommended driver – HP Laserjet 4L (300 dpi) when the document is created.

The system displays.

Note: The system displays the maximum length for each data field.

Figure 9

The field that was selected on the previous window is automatically highlighted and the information for that field is displayed.

In this example, the 1400 in the "Line" field is being changed to 1500.

Make the appropriate change(s) and select OK.

The system displays.

Figure 10

The field that was "edited" is automatically highlighted. More data fields can be edited, if needed. Select OK, when finished.

This option can also be used to "remove" a data field, if necessary. Highlight the field and press the delete key to remove a data field.

Note: This window can also be used to add a new data field to the page. Click on the **green plus sign on the right side of the window.

The **"Printer"** icon can be used to print out the definitions.

The **"Background"** link allows the credit union to import the PCL background for the laser document into VIEW. (See example on next few pages.) Prior to using this import feature, the laser document background must first be received from the third party vendor and on the PC.

Click on the **"Background"** link.

The C:\Datamatic window is displayed to select the PCL background to be imported. If the background is saved in another location, select the appropriate directory.
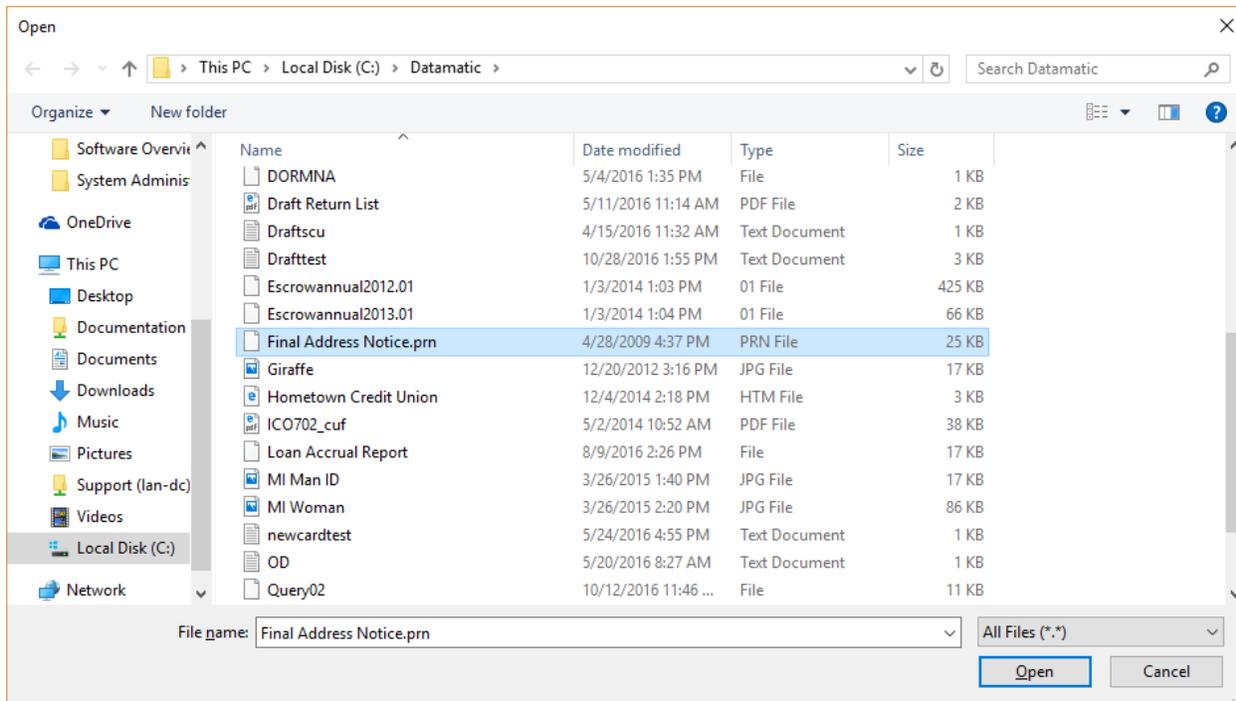
The system displays.

Figure 11

This picture is for example only. The files in the Datamatic folder on C:drive (or another directory) will vary per credit union.

Select the correct PCL file to be added by either using the arrow keys to highlight the file then pressing enter or by double clicking on the file.

Note: If more than one laser document background needs to be imported, each must be done separately.

The system displays.

Datamatic VIEW

Edit Page

Name: Test page

Type: Address Change

Format: Laser

Length: Lines Per Inch:

Fields:

Field	Line	Position	Length	Print N/A	Descripti
Name	900	300	31	No	
Address Line 1	950	300	25	No	
Address Line 2	1000	300	25	No	
City, State Zip	1050	300	36	No	
Previous Address Line 1	1500	300	25	No	

Export   Background   Save

Figure 12

The system returns to the Edit Page window. When finished, be sure to select the **"Save"** button to save any changes done.

After selecting an existing page **(Dot Matrix)** to make changes, the system displays.

Datamatic VIEW ✕

Add Page

Name:	Test page2					
Type:	Loan Document					⌄
Format:	Dot Matrix					⌄
Length:	88		Lines Per Inch:	8 Lines per Inch		⌄

Fields:

Field	Line	Position	Length	Print N/A	Descripti
Account Number (Base / Check / Suffix)	10	4	10	No	
Name (First)	50	4	15	No	
Name (Last)	50	25	15	No	

Import

Save

Figure 13

Note: The **"Import" link is only available for laser forms.

To "Edit" an existing field, highlight the field to make the changes and press enter or double click on the field.

The system displays.

Note: The system displays the maximum length for each data field.

Figure 14

The field that was selected on the previous window is automatically highlighted and the information for that field is displayed.

In this example, the 4 in the "Position" field is going to be changed to 10.

Make the appropriate change(s) and select OK.

The system displays.

Figure 15

The field that was "edited" is automatically highlighted. More fields can be edited, if needed. Select OK when finished.

This option can also be used to "remove" a data field, if necessary. Highlight the field and press the delete key.

Note: This window can also be used to add a new data field to the page. Click on the **green plus sign on the right side of the window.

The **"Printer"** icon can be used to print out the definitions.

Select the Save button, when finished.

Note: The **"Export" link is only available for laser forms.
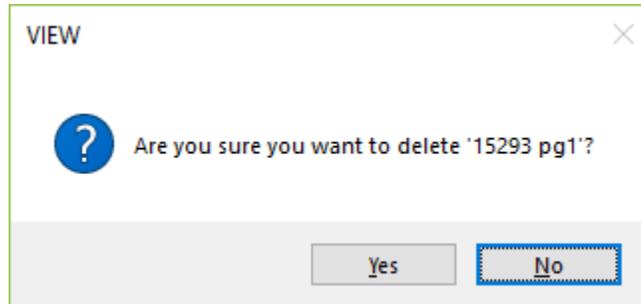
Edit Page

To edit an page, click on the Add icon on the ribbon.

Select the Save button, to save changes.

Delete Page

To delete a page, click on the delete icon on the ribbon.

To proceed with deleting the page, select yes. Otherwise, select no.