LPS Desktop Training for Vendors / Attorneys

Training Catalog

2011

http://training.lpsdesktop.com
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Accelerate your Knowledge of LPS Desktop with eLearning any time of the day or night or register for a live training session with one of LPS Desktop Training Specialists. Leverage the different features to find the resources you need to create a customized learning plan:

- SEARCH & LEARN™
- MY PLAN
- MY PROGRESS
- CATALOG
- Instructor Led Training

https://lps.skillport.com/skillportfe/login.action

LPS Desktop® Training & Documentation Team

Our specialists, which include technical writers, instructional designers, eLearning developers and trainers, work hard to develop and deliver a variety of comprehensive learning delivery solutions.

Our delivery solutions include Web-Based Training (WBT), Simulations, eBriefs, Instructor Led Training (ILT), online User Guides and more.

We here at LPS Desktop® make every effort to help you maximize your employees’ potential and effectiveness, as well as elevate and improve business operations. In addition, LPS can assess, design, develop and deliver training programs designed specifically for your business, or to augment your existing training programs.

Our goal is to build a long-term foundation for learning beyond the implementation period.

Contact Information

Phone: 904.360.4100
Email: DesktopTraining@lpsvcs.com
Web: http://training.lpsdesktop.com

PowerCell®

As LPS’ customer contact center, PowerCell® provides technical and application assistance to customers. As true business partners of the companies they serve, PowerCell® consultants are cognizant of information that could impact their customers, proactively communicate this information and are experts in the areas they support.

Contact Information:

Phone: 904.854.5462
email: PM.Support@lpsvcs.com
IM.Support@lpsvcs.com
LPS Desktop’s electronic invoice management solution (formerly known as NewInvoice™) saves time and eliminates errors by automating every aspect of the invoice process, from bill presentment and processing to post-payment activities. Online, real-time submission of invoices and reconciliation of payments eliminates errors and speeds up the payment process. The solution allows Vendors to submit invoices electronically, attach image receipts, checks and photographs per client requirements, virtually eliminating lost invoices and supporting documentation.

Integrated with other LPS products:
- Process Management – LPS Desktop
- Document Management – LPS ECM
Invoice Management Web Based Training Material

IM Overview for Vendors
This course is designed to give Vendors an introductory overview of LPS Desktop Invoice Management common features such as: accessing Invoice Management, using eMessages and the search option, accessing various reports, and the functionality of the user guides. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 15 min.

Invoice Management Monthly Billing
This course will introduce learners to the monthly billing process for Invoice Management. Upon completion of this module, learners will be able to: recognize the need to access the monthly invoice and remit payment in a timely fashion; reconcile your records with the online billing reports and inquire about any discrepancy; send the payment to the appropriate address with the necessary information; and resolve any payment problem that may occur. Target Audience: All IM Vendors; Prerequisites: None; Expected Duration: 10 min.

Invoice Management Automated Clearing House (ACH) Training
This course will introduce you to the functionality available in the first phase of the ACH implementation including activating and deactivating accounts, changing account information and impacted reports. Target Audience: IM Vendors with ACH Functionality; Prerequisites: None; Expected Duration: 10 min.

Invoice Management Import Tools
This course will introduce you to using Import Tools to send multiple invoices to Invoice Management rather than entering them manually, one at a time. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 15 minutes

Invoice Management IPA Vendor
This course will introduce you to the process required to create and submit a request for Investor Pre-Approval (IPA). Upon completion of this module, learners will be able to: create an Investor Pre-Approval request; add documentation to an IPA request via fax and upload; edit an IPA request; run IPA Reports; and resolve IPA Requests. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 10 min.

IM Module I: Vendor Overview
This module is designed to provide you with additional practice to further develop mastery with basic navigation and features that were introduced in the Invoice Management Overview WBT. This module includes a basic overview of the Vendor Home page. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 10 min.

IM Module II: Creating an Invoice
This module is designed to provide learners with the knowledge to successfully create an invoice to be delivered to a Servicer for reimbursement of services rendered. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 10 min.
IM Module III: Servicer Review
This module is designed to provide learners with the knowledge to submit an invoice to a servicer; respond to line item discrepancies; and respond to inquiries made by a Servicer concerning an invoice. This module also includes a review of the various invoice statuses involved in processing an invoice. 
Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 10 min

IM Module IV: Vendor Reports
This module is designed to provide learners with the knowledge to determine the use of commonly used Invoice Management Vendor reports using the Online User Guide and respond to a final bill deadline issued by the Servicer. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 5 min.

IM Module V: eMessages
This module is designed to provide learners with the knowledge and skills required to use the communications utility called eMessages. Target Audience: IM Vendors; Prerequisites: None; Expected Duration: 10 min.

Invoice Management Instructor Led Training (ILT)

Core Curriculum

IM Vendor Core Curriculum
This course is designed for users new to LPS Desktop Invoice Management or for existing users who need a refresher. This course covers how Vendors create and submit invoices, reviewing invoices returned from Servicers and using reports and eMessages. Target Audience: New & Existing IM Vendors; Prerequisites: Invoice Management Overview for Vendors and Monthly Billing (WBTs); Expected Duration: 3 hours

IM Vendor Administration
This course is designed for users new to LPS Desktop Invoice Management or for existing users who need a refresher. This course looks at the functions an Invoice Management Administrator would perform. Topics include managing new and existing users, commonly used Admin reports and changing the Vendor mailing address. Users are strongly encouraged to view the Web Based Trainings (WBTs) prior to the session to have the full training experience. Target Audience: New & Existing IM Vendors; Prerequisites: Invoice Management Overview for Vendors (WBT); Expected Duration: 1 hour, 45 min.

IM Vendor Import
This course is designed for users new to LPS Desktop Invoice Management or for existing users who need a refresher. This course guides users through the process of importing invoices through the Vendor Import application. Target Audience: Existing IM Vendors importing invoices in bulk; Prerequisites: Must have worked with LPS representative to create the files that will be used for the import process; Expected Duration: 1 hour, 15 min.

Enhancement Courses

IM Enhancement Release
This course is a question and answer session for existing users to answer any questions the Vendors may have regarding release enhancements described in the release notes. Target Audience: Existing IM Vendors; Prerequisites: None; Expected Duration: 1 hour
IM Application Certification
This certification is available for new and existing firms who use Invoice Management to create and track invoices. Obtaining an Invoice Management certification provides firms with subject matter expertise required to successfully manage invoices. Certification is achieved by successfully passing the certification exam. Note: If you would like to go through training prior to taking the certification exam, you can register for either of the following courses:

- IM Modules I-V (WBTs)
- IM Vendor Core Curriculum (ILT)

Target Audience: New & Existing IM Vendors; Prerequisites: None; Expected Duration: 1 hour
Ensure that you are operating at maximum efficiency with LPS Desktop’s workflow and process management solutions (formerly known as NewTrak™). Process workflow is configurable from the user level using rule-based functionality. Optimize your business by directing and delivering relevant information, images and services, all from one secure, real-time platform. Reconciliation of third-party information is streamlined utilizing a single, Web-based access point to connect third-party contacts with LPS Desktop. This means quicker processing and cost savings, while virtually eliminating the risk of error.

Integrated with other LPS products:

- Process Management—LPS Desktop
- Document Management—LPS ECM
- Invoice Management—LPS Desktop
Process Management Web Based Training Material

**WBTs (Web Based Training)**

**LPS Desktop Basics**
This course will familiarize LPS Desktop users with how to access LPS Desktop; navigate within LPS Desktop; customize the interface by creating shortcuts to available tools; and use the online User Guide to research additional features. **Target Audience:** All LPS Desktop Users; **Prerequisites:** None; **Expected Duration:** 15 min.

**PM Read Only Access**
This course will familiarize Process Management read-only access users with how to navigate both LPS Desktop and the Process Management; search for loans; use queue filters; and customize the interface by creating shortcuts to available tools. **Target Audience:** All PM Users; **Prerequisites:** None; **Expected Duration:** 20 min.

**PM Overview**
This course will familiarize Process Management users with how to navigate within Process Management; search for loans; and customize the interface by creating shortcuts to available tools. **Target Audience:** All PM Users; **Prerequisites:** LPS Desktop Basics; **Expected Duration:** 20 min.

**PM Intercoms**
This course will familiarize Process Management users with how to create and view secure messages for Servicer-Attorney communication. **Target Audience:** All PM Users; **Prerequisites:** PM Overview; **Expected Duration:** 15 min.

**PM Work Groups**
This course will familiarize Process Management users with how to access their daily workflow and complete assigned events (or Steps). **Target Audience:** All PM Users; **Prerequisites:** PM Overview; **Expected Duration:** 10 min.

**PM Issues**
This course will familiarize Process Management users with how to flag a loan due to an issue that does not stop the processing of the file. **Target Audience:** All PM Users; **Prerequisites:** PM Overview; **Expected Duration:** 20 min.

**PM Holds**
This course will familiarize Process Management users with how to place a hold on a process to stop the legal action on the file. **Target Audience:** All PM Users; **Prerequisites:** PM Overview; **Expected Duration:** 20 min.

**ALAs (Asynchronous Learning Activity)**

**PM Pull-In Steps**
This activity will familiarize Process Management users with how to add additional events (or Steps) to a timeline for one-off situations. **Target Audience:** All PM Users; **Prerequisites:** None; **Expected Duration:** 5 min.

**PM Read Only Intercoms**
This activity will familiarize Process Management users with how to view communication (or Intercoms) as a user with Intercom Read-Only Access. **Target Audience:** All PM Users; **Prerequisites:** PM Overview; **Expected Duration:** 5 min.
PM Tasks
This activity will familiarize Process Management users with setting task reminders.
Target Audience: All PM Users; Prerequisites: PM Overview; Expected Duration: 5 min.

PM Add Prior Hold
This activity will familiarize Process Management users with how to carve out time via a Hold after the time period has elapsed.
Target Audience: All PM Users; Prerequisites: PM Overview; Expected Duration: 5 min.

PM Viewing IM from PM
This activity will familiarize Process Management users with how to view invoices via Process Management if they are also Invoice Management users. Target Audience: All PM Users Who Are Also IM Users; Prerequisites: WBT: PM Overview or PM Read Only Access; Expected Duration: 5 min.

Process Management Instructor Led Training (ILT)

Learning Bites

PM Processes
This course is designed for new users to Process Management or existing users who need a refresher. Learners will have hands-on experience while covering the following subjects: completing events (Steps); adding documents to files; and requesting additional documentation and signature required documentation from the Servicer. The session focuses on efficiency and the benefits of Process Management. Users are strongly encouraged to view the Web Based Trainings (WBTs) prior to the session to have the full training experience. Target Audience: All PM Users; Prerequisites: WBT: LPS Desktop Basics and Process Management Overview; Expected Duration: 1 hour

PM Workflow Management
This course is designed for new users to Process Management or existing users who need a refresher. Learners will have hands-on experience while covering the following subjects: accessing daily work and sending secure messages. The session focuses on efficiency and the benefits of Process Management. Users are strongly encouraged to view the Web Based Trainings (WBTs) prior to the session to have the full training experience. Target Audience: All PM Users; Prerequisites: WBT: LPS Desktop Basics and Process Management Overview; Expected Duration: 1 hour

PM Actions
This course is designed for new users to Process Management or existing users who need a refresher. Learners will have hands-on experience while covering the following subjects: changing the due date of an event (Step) when more time is needed; placing a hold on a process to stop the legal action on the file; flagging a loan due to an issue that does not stop the processing of the file; and submitting fees and costs quotes. The session focuses on efficiency and the benefits of Process Management. Users are strongly encouraged to view the Web Based Trainings (WBTs) prior to the session to have the full training experience. Target Audience: All PM Users; Prerequisites: WBT: LPS Desktop Basics and Process Management Overview; Expected Duration: 1 hour
Core Curriculum

PM Attorney Core Curriculum
This course will familiarize new Process Management users with the benefits and overall functionality of Process Management. Learners will have hands-on experience while covering the following subjects: accessing daily work and completing events (Steps); adding additional processes to a file; sending secure messages and adding comments to files; requesting due date extensions; and flagging files. Users are strongly encouraged to view the Web Based Trainings (WBTs) prior to the session to have the full training experience.

Target Audience: New PM Attorneys; Prerequisites: WBT: LPS Desktop Basics and PM Overview; Expected Duration: 4 hours 20 min.

PM Work Group Administration (Attorney)
This course will familiarize Administrative users of PM with how to create Work Groups, how to maintain those Work Groups, how to view Work Group maintenance reports, as well as creating Master Work Groups. Users are strongly encouraged to first complete the PM Core Curriculum prior to attending this session.

Target Audience: New PM Attorneys; Prerequisites: WBT: PM Core Curriculum; Expected Duration: 1 hour, 15 min.

Enhancement Courses

PM Enhancement Release
This course will familiarize existing users of Process Management with the release enhancements to provide additional clarification beyond the Release Notes.

Target Audience: Existing PM Attorneys; Prerequisites: PM Attorney Core Curriculum; Expected Duration: 1 hour

A la Carte

PM Attorney Performance Report (APR) Overview
This course will familiarize Process Management users with the report that rates the performance of attorney firms.

Target Audience: PM Attorneys; Prerequisites: WBT: PM Attorney Core Curriculum; Expected Duration: 2 hours, 30 min.

PM Attorney Expectations Document (AED) Overview
This course will familiarize Process Management users with how to interpret the Attorney Expectations Document drafted by Services.

Target Audience: PM Attorneys; Prerequisites: WBT: PM Attorney Core Curriculum; Expected Duration: 1 hour

Administrative Courses

PM User Account and Work Group Administration (Attorney)
This course will familiarize Administrative users of Process Management with how to create new users for your office, as well as how to manage any existing users. This session then demonstrates how to create Work Groups, how to maintain those Work Groups, how to view Work Group maintenance reports, as well as creating Master Work Groups. Users are strongly encouraged to first complete the PM Core Curriculum prior to attending this session.

Target Audience: New PM Attorneys; Prerequisites: WBT: PM Core Curriculum; Expected Duration: 1 hour, 45 min.

PM User Account Administration (Attorney)
This course will familiarize Administrative users of Process Management with how to manage any existing users. Users are strongly encouraged to first complete the PM Core Curriculum prior to attending this session.

Target Audience: New PM Attorneys; Prerequisites: WBT: PM Core Curriculum; Expected Duration: 45 min.
As an extension of Enhanced MSP, LPS Business Intelligence (BI) gives users the ability to query, analyze, format, graph and distribute information tailored to unique business needs. Users can store and schedule delivery of current and historical reports as needed, customize dashboard views to meet end users’ information needs, analyze summarized data and historical trends with query and graphical formatting capabilities and integrate Magnifide BI with existing desktop applications and business processes to maximize performance.
**Business Intelligence Web-Based Training (WBT)**

**Introduction to Business Intelligence**
This brief course will provide users with an introduction to the basic functionality of Business Intelligence, including searching for, running and viewing reports. Upon completion of this module, learners will be able to: access Business Intelligence; navigate within InfoView; search for a report; manually run and view a report; and schedule a report. **Target Audience:** ALL BI Users; **Prerequisites:** None; **Expected Duration:** 15 minutes

**Business Intelligence Getting Started with Self-Service Reporting**
This module will introduce you to the Self-Service Reporting features within Business Intelligence. Upon completion of this module, learners will be able to: access self-service reports; create reports; and perform basic reporting functions such as sorting, exporting, printing and converting data to tables and charts. **Target Audience:** ALL BI Users; **Prerequisites:** None; **Expected Duration:** 15 minutes

**Business Intelligence Instructor Led Training (ILT)**

Business Intelligence will be offering Instructor Led Training sessions starting late 2011. This advanced user course will provide users with a more in-depth view of the capabilities of LPS Desktop’s Self-Service Reporting tool.
DIS improves the speed, accuracy and cost of the data exchange between various client systems and the LPS Desktop Process Management and Invoice Management applications. DIS is a bi-directional XML Web-based tool for attorneys and other service providers that allows third-party applications and case management systems to interface directly with LPS Desktop, and eliminates manual data submission from multiple locations.
Data Integration Services Web-Based Training (WBT)

Data Integration Services Overview
This course will familiarize attorney Process Management users with the benefits of using Data Integration Services (DIS). DIS utilizes web services to link a firm’s Case Management System to Desktop Process Management. This integration creates many benefits including reducing duplicate data entry. Target Audience: Attorney PM Users and All DIS Users; Prerequisites: None; Expected Duration: 15 minutes
Learning & Resource Portal QRG

Logging In:
2. From the Welcome screen of the LPS Desktop Learning & Resource Portal, click Log in.
3. On the Login screen, type your User ID and Password.
4. Click Log In.
Note: If you are logging into the LPS Desktop Learning & Resource Portal for the first time, you might need to complete the following fields:
   - Security Question
   - Answer to Security Question
   - E-mail Address

Creating your Profile by Registering for the first time:
3. On the New User Registration screen, complete the following fields:
   - First Name
   - Last Name
   - Select Group
   - E-mail Address
   - Company Code
   - Comments
   - User ID
   - Password
   - Confirm Password
4. Click Submit. Note: Once you submit your registration form, you will be notified by e-mail with your Login ID and Password.

Note: In the Comments field please specify company/serviceer name and/or if you will be utilizing multiple LPS Desktop applications.

Searching for a Course using SEARCH&LEARN:
1. Locate the SEARCH&LEARN pane in the LPS Desktop Learning & Resource Portal and type a keyword or phrase in the Search for field.
2. Select a course category or All from the Category drop-down list.
3. Click Search. The search results appear in the Search Results section.
4. Examine the search results by performing one of the following:
   - Hovering your mouse over the course title, and clicking Show Details.
   - Clicking the View More link for that category.
5. To refine your search results further, type a keyword in the Search within results field and click Search (optional).

Updating your Profile:
1. Click the My Profile link in the upper-right corner of the LPS Desktop Learning & Resource Portal screen.
2. Under My Profile, click the Update Your User Profile link.
3. Under the Update Your User Profile screen change the values in the fields provided.
4. Click Update Profile.

Retrieving your User ID:
1. From the Welcome screen of the LPS Desktop Learning & Resource Portal, click Log in.
2. On the Login screen, click Forgot your user ID?
3. Type your e-mail address into the Email Address field that is registered in the LPS Desktop Learning & Resource Portal.
4. Click E-mail my user ID.

Resetting your Password Yourself:
1. From the Welcome screen of the LPS Desktop Learning & Resource Portal, click Log in.
2. Under Reset Password, type the answer to your security question.
3. Click Reset my password.
4. Enter the new password in the Enter your new password field, and then in the Confirm your new password field.

Searching for a Course using the Catalog:
1. From the LPS Desktop Learning & Resource Portal screen, click CATALOG on the navigation pane.
2. Navigate down into the catalog structure to find the curricula folder that you are searching for and click the expand icon.
3. To view more information about a course, hover your mouse over the title and click the Show Details link that appears.

Registering for an Instructor Led Training (ILT) Session
1. Access a course by performing one of the following:
   - Browse the Catalog or search for the ILT session using SEARCH&LEARN.
   - If you have added an ILT session to MY PLAN, click MY PLAN on the navigation pane and navigate to the ILT session.
2. Register for an ILT session by performing one of the following:
   - Option 1: Select the title of the ILT session or click
Registering for WBT Module Session:
1. Access a course by performing one of the following:
   - Browse the Catalog or search for the WBT Module using SEARCH&LEARN.
   - If you have added the WBT Module to MY PLAN, click MY PLAN on the navigation pane and navigate to the course.
2. Register for a WBT Module session by performing one of the following:
   - Option 1: Select the title of the WBT Module session or click the WBT Module icon next to the name of the session.
   - Option 2: Select the Launch link next to the WBT Module session title. The WBT Module Session will launch.
3. If Option 1 is selected:
   - Add the course to your MY PLAN by clicking the Add to MY PLAN icon. By doing so, the course can be launched directly from your MY PLAN.
   - Launch the WBT by clicking the Launch icon or clicking the Launch link. The WBT will launch directly from this link.

Registering for an ILT Virtual Session:
1. Access a course by performing one of the following:
   - Browse the Catalog or search for the ILT session that offers an ILT Virtual session using SEARCH&LEARN.
   - If you have added an ILT Virtual session to MY PLAN, click MY PLAN on the navigation pane and navigate to the ILT Virtual session.
2. Register for an ILT Virtual session by performing one of the following options:
   - Option 1: Select the title of the ILT session or click the ILT icon next to the name of the session to open the session description.
   - Option 2: Select the Sessions link next to the ILT session title. The Course Detail screen displays.
3. If Option 1 is selected, follow steps 4-7. If Option 2 is selected, follow steps 5-7.
4. From the ILT Session Description screen, click the Launch icon. The Course Detail screen displays.
5. Under Sessions for this Course section, locate the ILT Virtual Session icon. Select the Session Number of this session. Note: You can also view the available session on the Session Calendar.
6. From the Course Detail screen that displays, click Enroll Me.
7. You are now registered in the selected session.

Playing a WBT Module online:
1. From the LPS Desktop Learning & Resource Portal, click MY PLAN on the navigation pane and navigate to the course.
2. Hover your mouse over the course title and click the Launch icon.

Launching an ILT Virtual Session:
1. Access the ILT Virtual session by performing one of the following:
   - Option 1: Click MY PLAN on the navigation pane and navigate to the ILT Virtual session.
   - Option 2: Click Instructor Led Training on the navigation pane and navigate to the ILT Virtual session.
2. If Option 1 is selected, follow steps 3-5. If Option 2 is selected, follow steps 6-7.
3. Hover your mouse over the title of the session that you want to launch and click the Launch link.
4. On the Course Details screen, click the URL link under the Session Details section to launch the course.
5. In the Participant Login screen, enter your name, email address, session password, and click Log In.
6. From the My ILT screen, under Instructor Led Training Sessions I Am Enrolled In section, select the ILT session to join, by clicking the link to the session.
7. Continue launching the session by following steps 4-5.

How to Join Our Mailing List:
3. On the Join Our Mailing List screen type your Full Name and Your email address, click Submit Form.
4. Under Your Interests, select the products that you would like to receive a Newsletter. Note: If you’d like updates from all the products, select All Products.
5. Enter Your Information into the following fields:
   - First Name
   - Last Name
   - Company Name
   - Job Title
   - Work Phone (optional)
   - Notes (optional)
6. Under Preferred email format select the format of the email.
7. Click Save Profile Changes.

Note: You will receive a notification email notifying you that you have been registered.