



Secure Document Exchange

Users Guide

Proprietary and Confidential

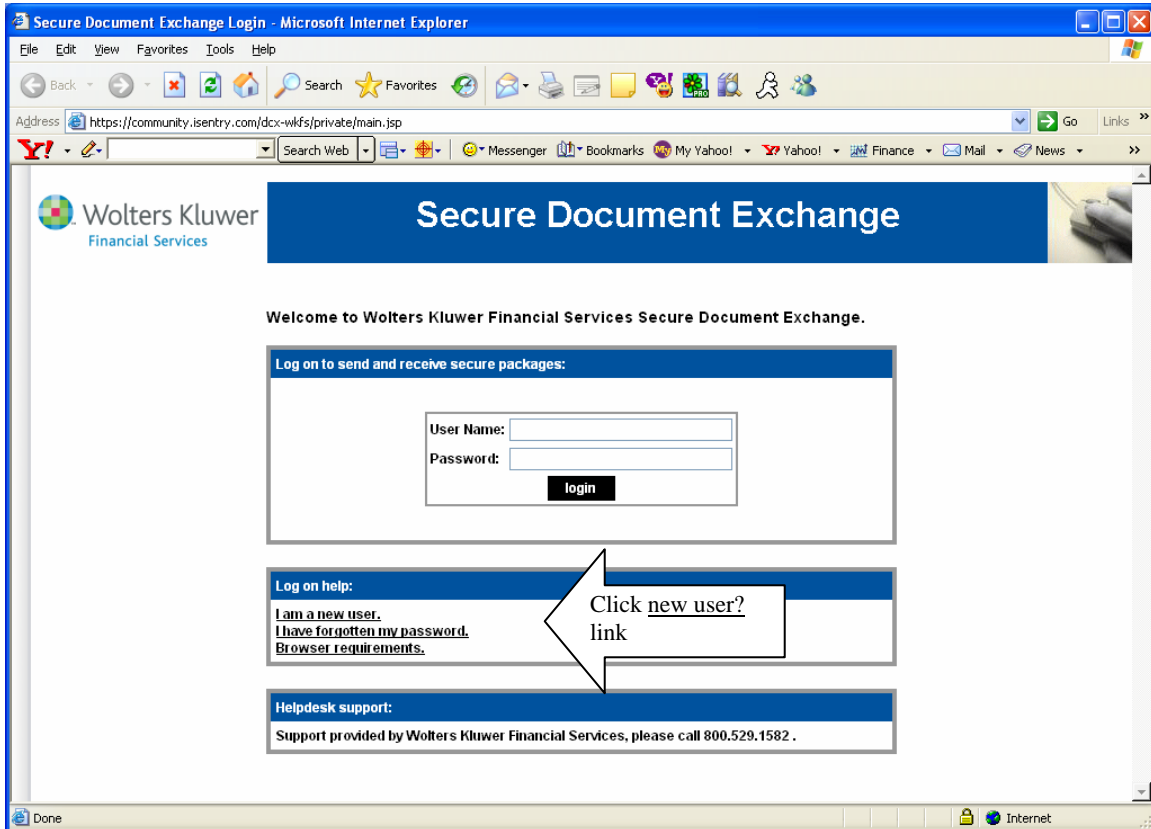
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New User Registration:

SDX utilizes either a single or a multi-step registration process, comprising the following phases:

1. From the following URL, <https://sdx.secure-dx.com> click the [new user?](#) Link Note: The actual link may differ depending on the specific site being accessed.



- Users are required to fill in a Self Signup form.
 - The exact Four digit PIN number and Birth Date entered here will be needed to complete your 2nd and final step of the registration.
 - This info is also needed in the future to authenticate you in requesting Password Resets and other Help Desk related issues.

Secure Document Exchange Self Signup - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: https://community.isentry.com/dcx-wkfs/registration/Signup

Wolters Kluwer Financial Services

Secure Document Exchange

Self Signup

Save User Guide

Complete all fields

Welcome to the Secure Document Exchange self-signup page.
Please fill in the form below and click the "Save" button.

Note that you will need the email address of a Wolters Kluwer Financial Services employee registered with the system to approve your request.
Please make a note of the Four Digit PIN you choose - you will need to enter this and your Birth Date correctly to complete registration on approval.

Email Address: ktip@yahoo.com
You will need to be able to receive email from wolterskluwer@secure-dx.com to complete this process.

Referral Contact Email Address: gevans@vmp.com

Your name: Kevin V Test
(First, Middle Initial, Last)

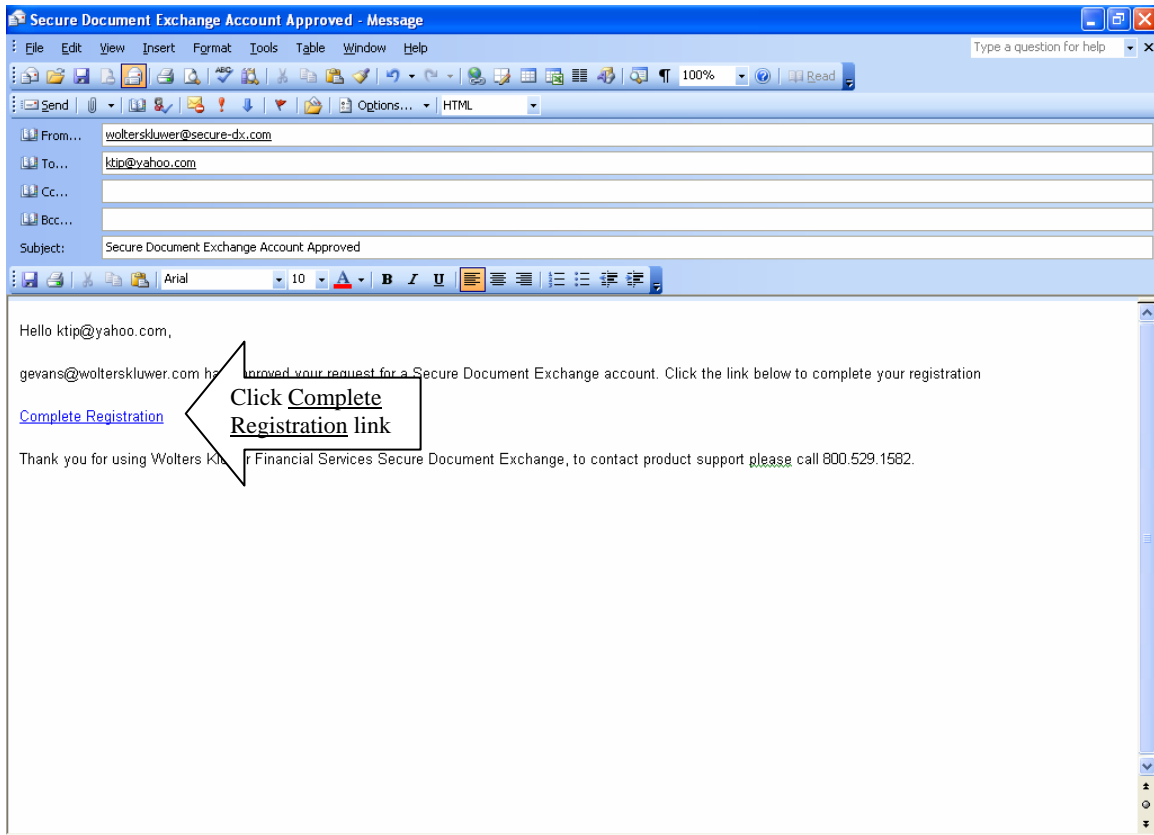
Four digit PIN number: ****

Birth date (month/day): 04 / 01

Contact Tel Number: 866-420-9066

Employers Name: VMP

3. You will receive an email containing a link to [Complete Registration](#) and click on the link to move to the next step.



4. Fill in the Complete Registration form.
 - Select and Re-enter your password
 - The Four digit PIN number and Birth Date MUST match what you provided in the 2nd step of the registration process.

Verify Details - Microsoft Internet Explorer

Address: <https://community.isentry.com/dcx-wkfs/ri/CS?c=U%2BMPZZkT6m41RF%2BFqilFA%3D%3D>

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Secure Document Exchange

Complete Registration

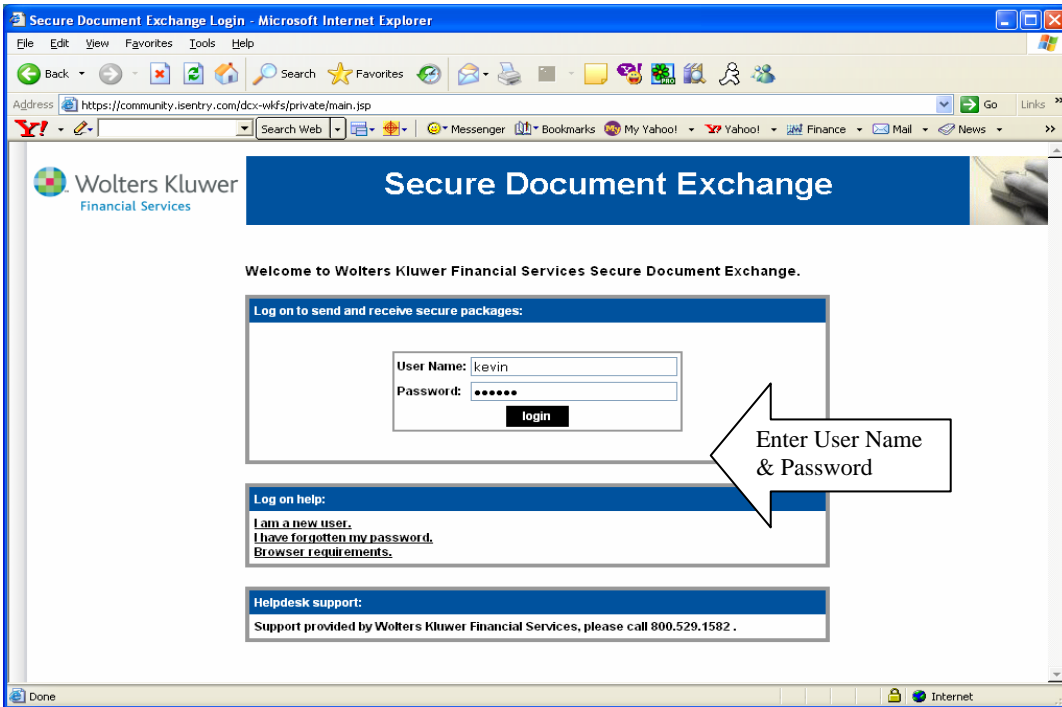
Save User Guide

Welcome to the final step of the self-signup process.
To complete your registration, please fill in the information below and click the Save button.

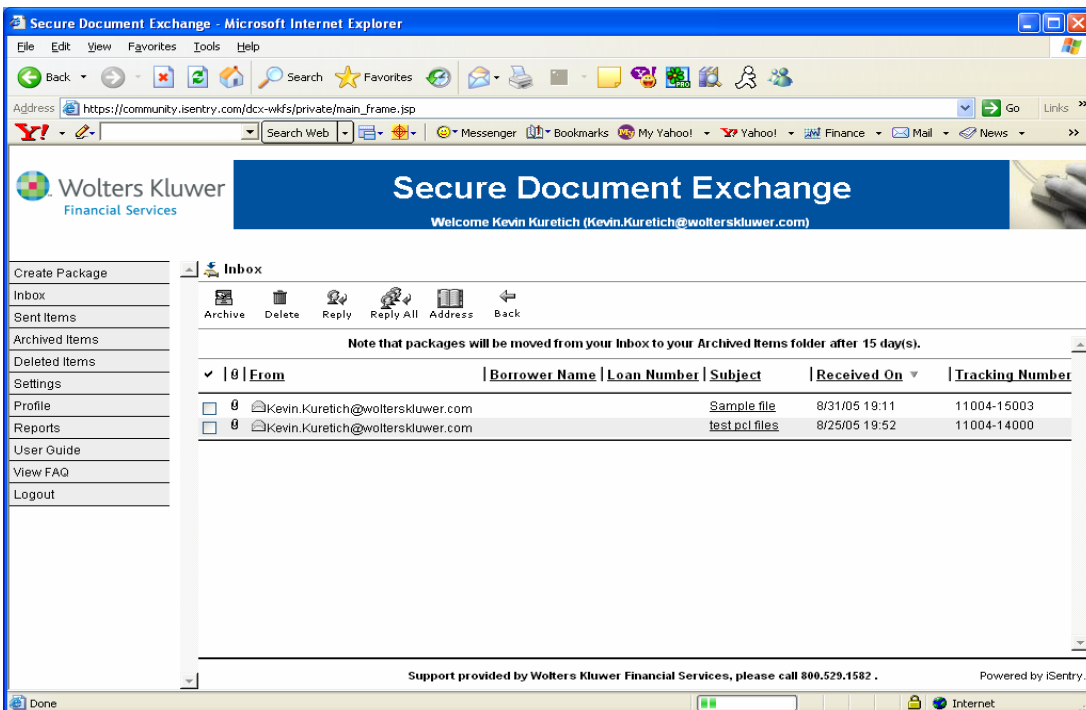
Username:	<input type="text" value="krip12@yahoo.com"/>
Select a password:	<input type="password" value="....."/>
Re-enter your password:	<input type="password" value="....."/>
Password hint:	<input type="text" value="favorite football team"/>
Four digit PIN number:	<input type="text" value="...."/>
Birth date (month/day):	<input type="text" value="01"/> / <input type="text" value="14"/>

Complete all fields

- After you have completed the 4th and final step of the registration, you may begin to log in using your User Name (Email Address) and the Password selected.



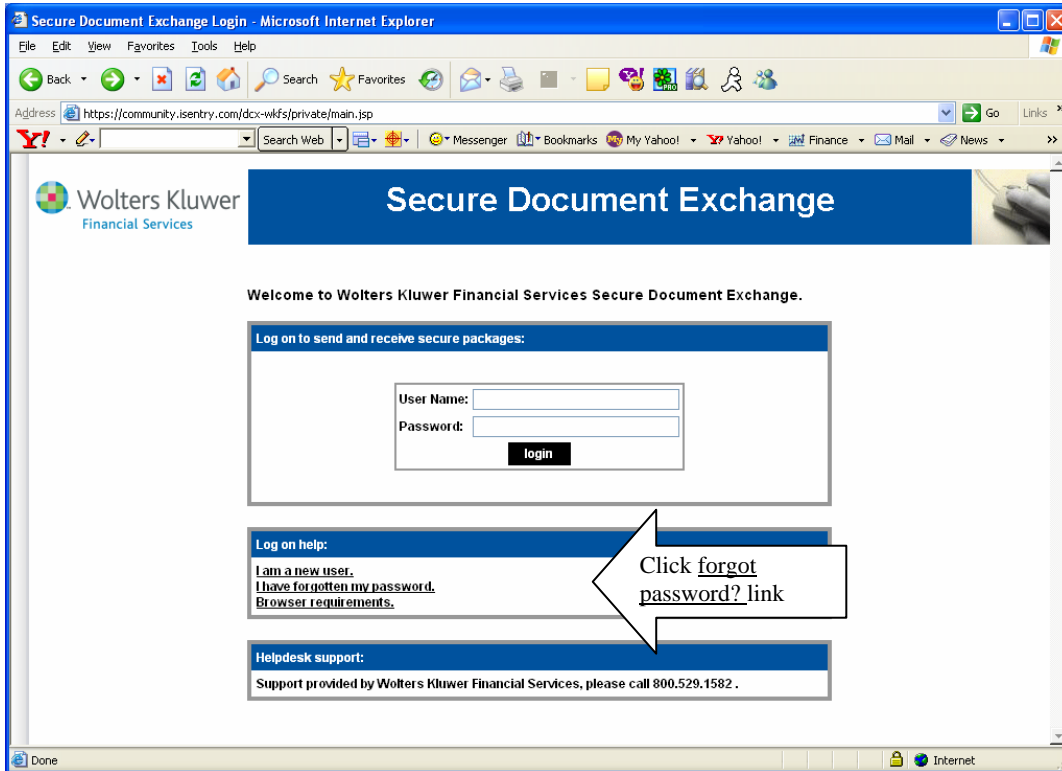
- Your Inbox will appear after a successful log in.



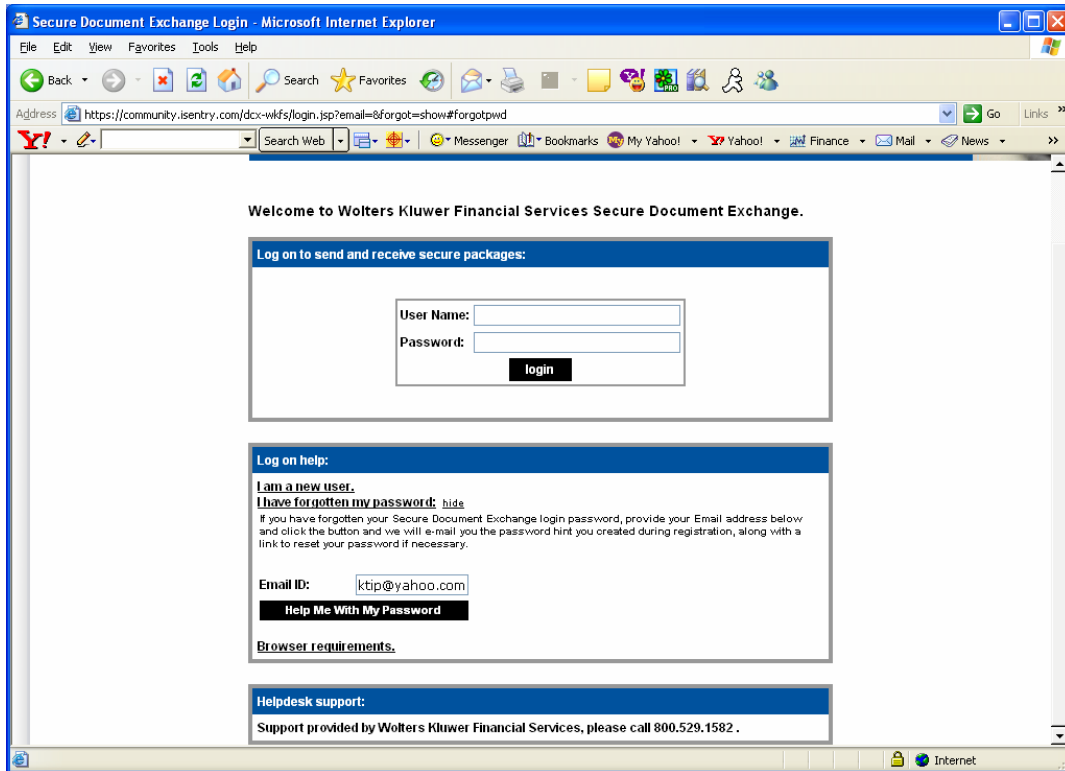
Forgot Password:

If you forget your password:

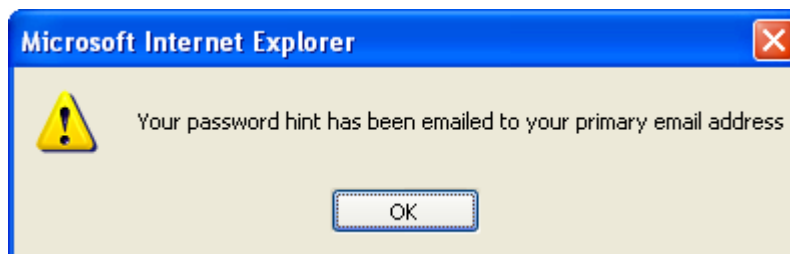
1. Click on the 'forgot password?' link on the log in page.



2. Enter your Email ID, and we will e-mail you the password hint you created during registration. You may choose either 'Reset Password' or 'Send Hint'.



3. If you select 'Send Hint', an email with the hint will be sent to your registered email address.

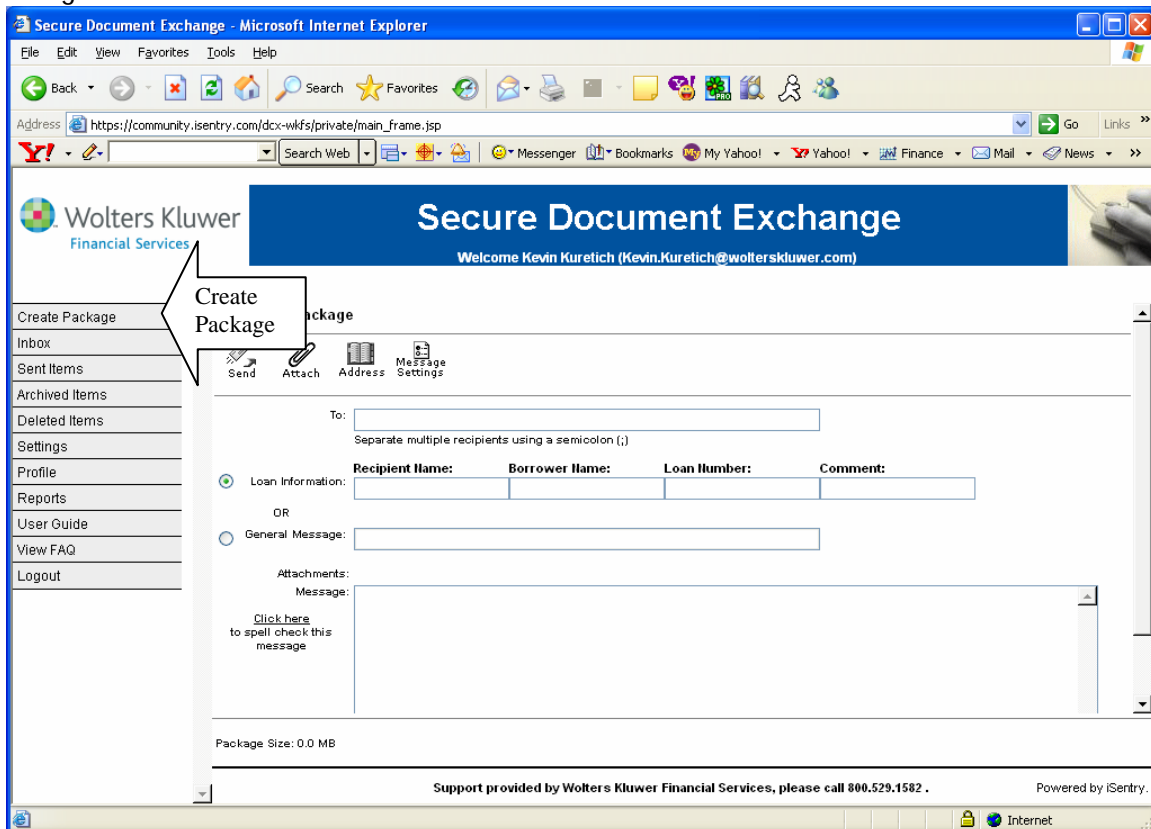




- If you select 'Reset Password', an email with a random temporary password will be sent to your registered email address.





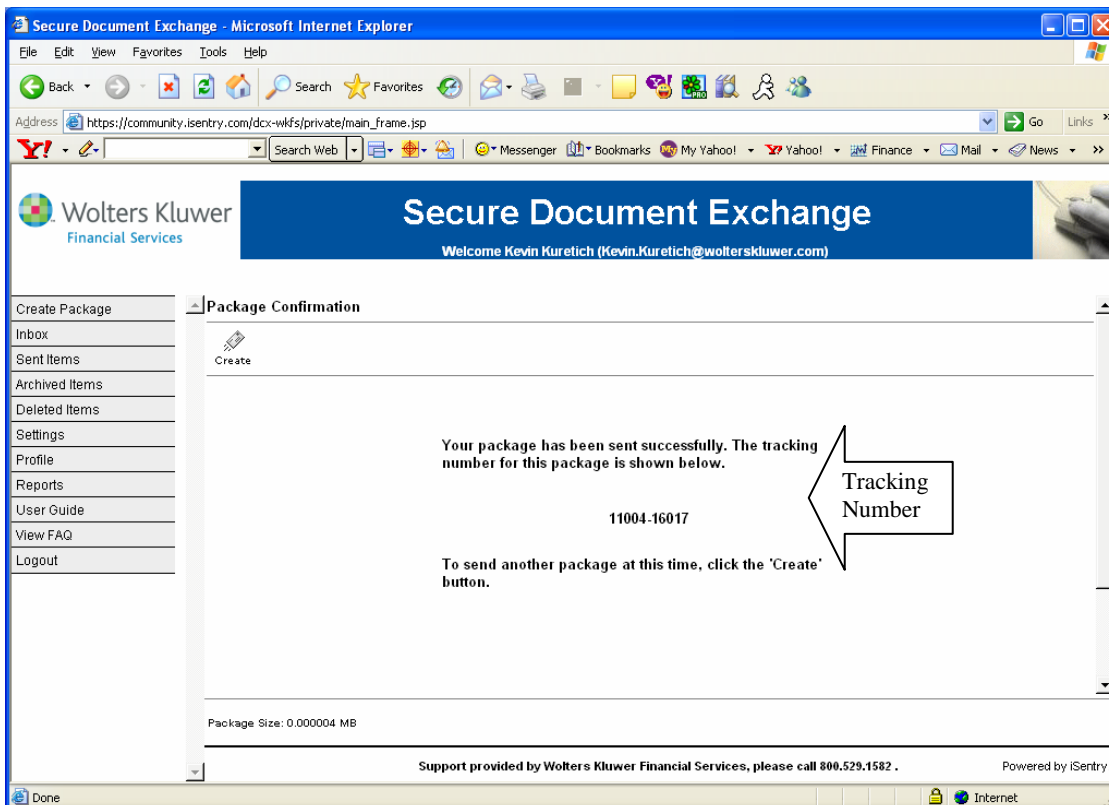
Create a Message:

To create a package, please click on the Create Package link on the left hand navigation side bar.



- Click on the To text box and fill in the recipient email address(es), or
 - Click on the 'Address' button , choose the address(es) from your personal address book and click 'Send To' button 
- Choose the Loan Information section and fill in the package 'Loan Number', 'Borrower Last' and Redraw Number fields. Please note that your input becomes the content for the Subject field for the message, or

- a. Choose the General Message section, click in the General Message text box and type in subject line text. Again, please note that your input becomes the content for the Subject field for the message.
3. Click in the Messages text box, and type the text of the message.
4. To add an attachment/file, click the Attach button  choose the file you wish to attach to the message. You may [View](#) or [Remove](#) the file by clicking on the appropriate link.
5. Click the Send button  when you are ready send the message.
6. You will be presented with a Package Confirmation screen which also contains the sent message Tracking Number. The message will now also be in your Sent Items folder.



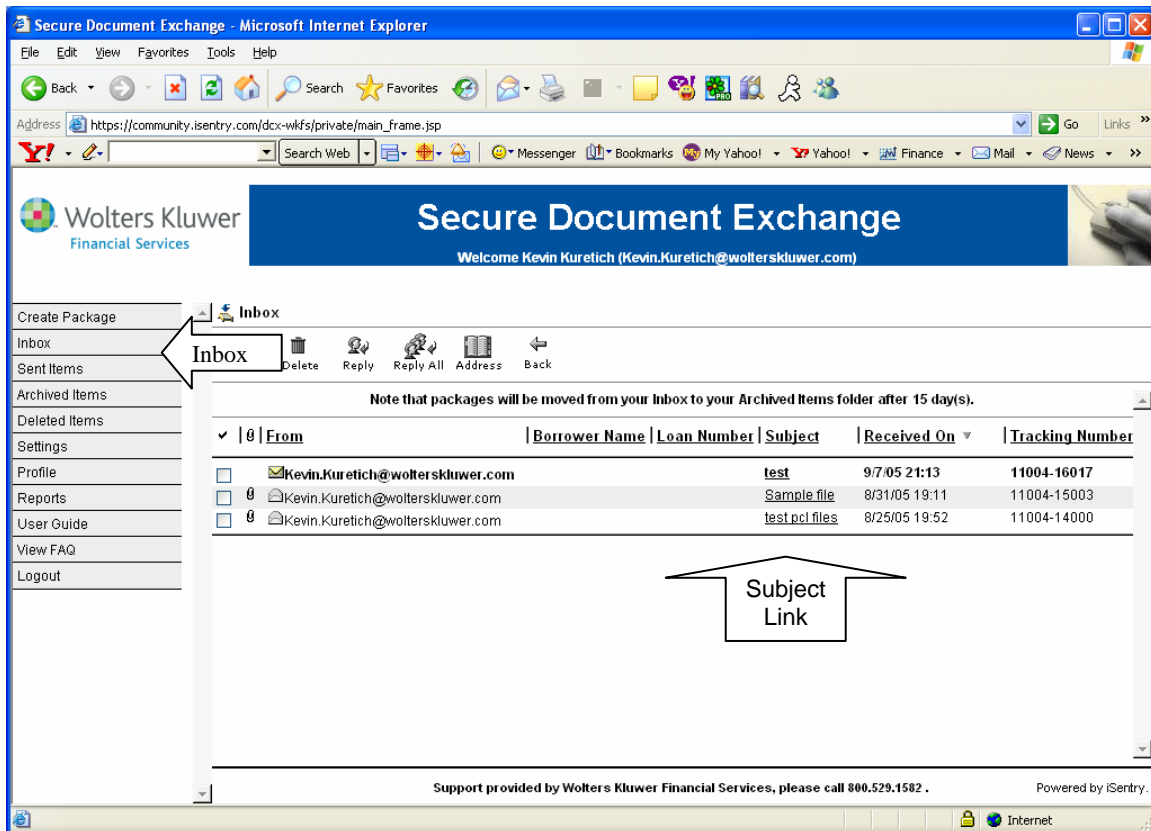
Reading Messages

From the Inbox, Sent Items, Archived Items and Deleted Items folders, you can open all messages received or sent by you.

Inbox:

To read incoming messages, click the Inbox link on the left navigation bar.

- An open envelope  indicates a read message.
- A closed envelope  indicates an unread message.
- To open a specific message, click its Subject link.



Note that packages will be moved from your Inbox to your Archived Items folder after 15 day(s).

	From	Borrower Name	Loan Number	Subject	Received On	Tracking Number
<input type="checkbox"/>	Kevin.Kuretech@wolterskluwer.com			test	9/7/05 21:13	11004-16017
<input type="checkbox"/>	Kevin.Kuretech@wolterskluwer.com			Sample file	8/31/05 19:11	11004-15003
<input type="checkbox"/>	Kevin.Kuretech@wolterskluwer.com			test.pcl files	8/25/05 19:52	11004-14000

Subject Link

To open a specific message, click its Subject link.

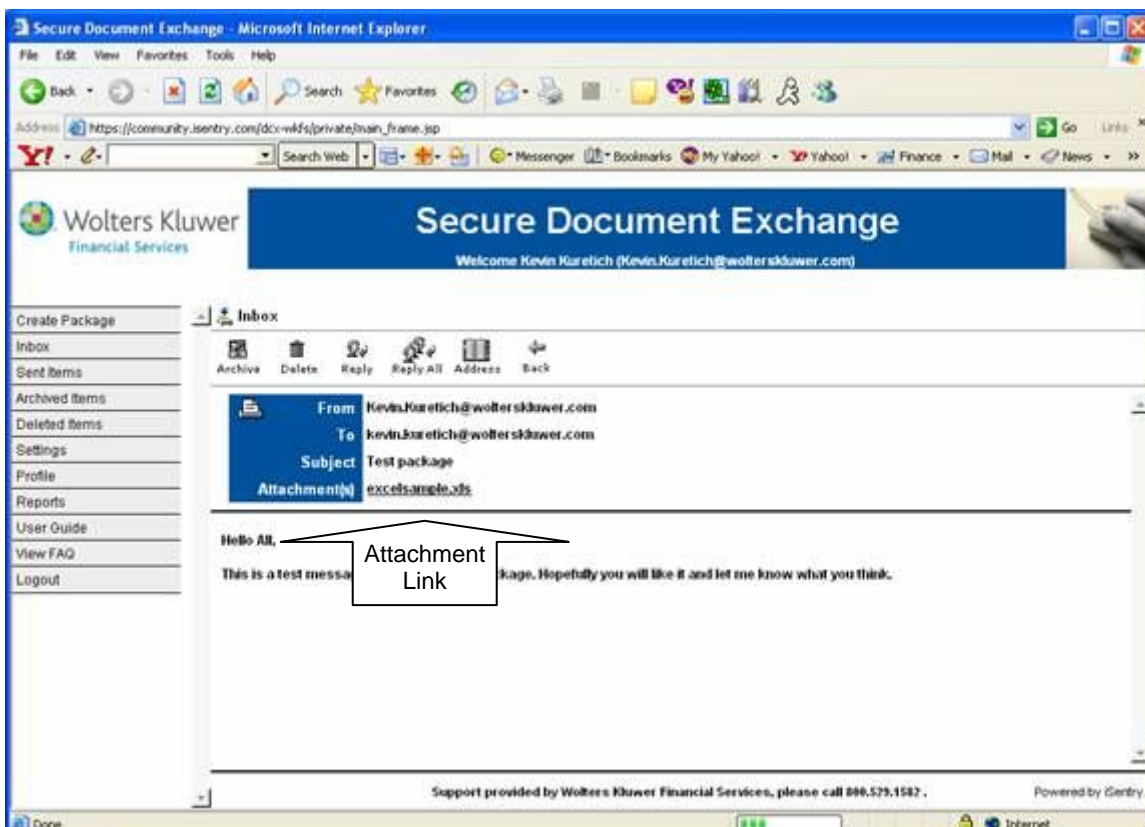
Click the Sent Items, Archived Items or Deleted Items links on the left navigation bar to see messages in the respective folders.

Viewing Attached Files:

To view a file attached to a message:

In the message, click the name of the attached file, next to Attachment(s) in the header section of the message. A dialog box appears.

You can view the file from its current location without downloading it. Alternatively you can save the attachment into a selected folder.




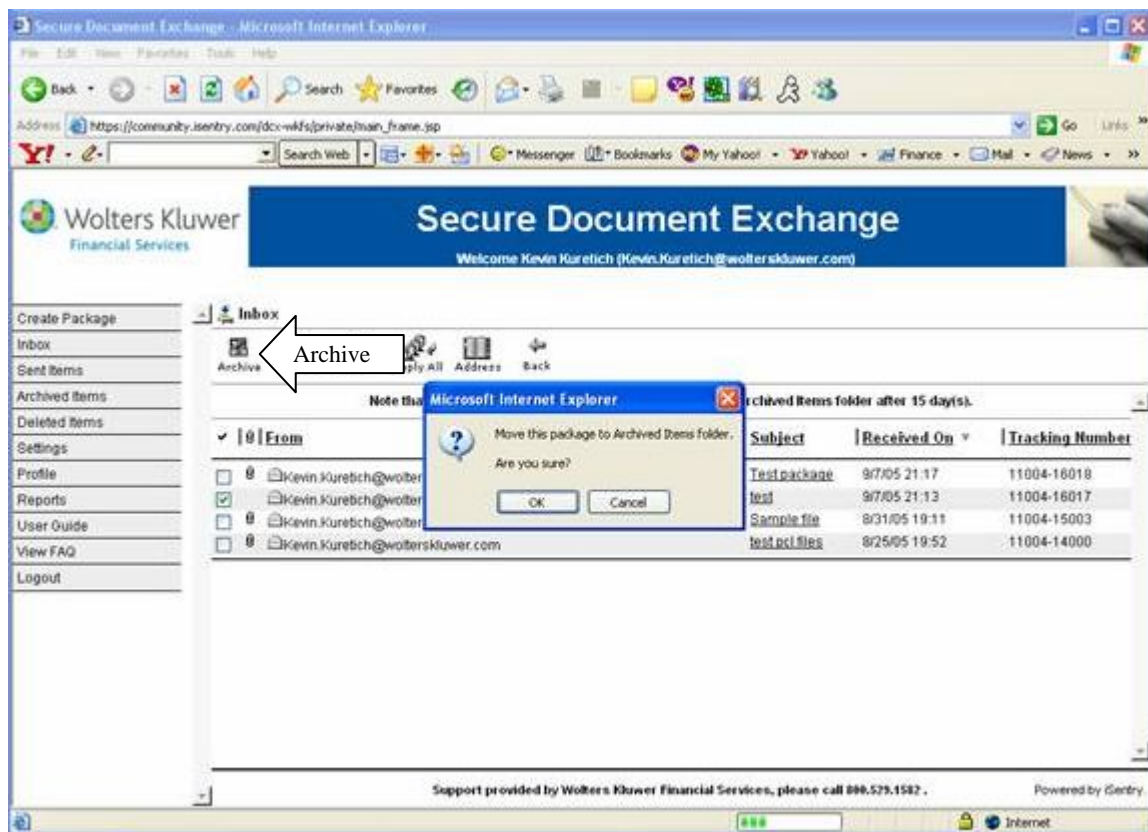
For more information on how to Archive, Delete, Recall or Reply to message refer to Working with Messages

Working with Messages

Archiving Messages

To move messages from your Inbox, Sent Items and Deleted Items folders to your Archived Items folder:

1. Click the Inbox, Sent Items, or Deleted Items link from the left navigation bar and select the message(s) you want to Archive.
 - To select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
 - To select or deselect all messages, click the icon.
2. Click the Archive button . You will be presented with a confirmation pop-up box.
 - Click the OK button if you want to move the selected messages to your Archived Items folder.
 - Click the Cancel button if you do not wish to move the message(s) to your Archived Items folder.




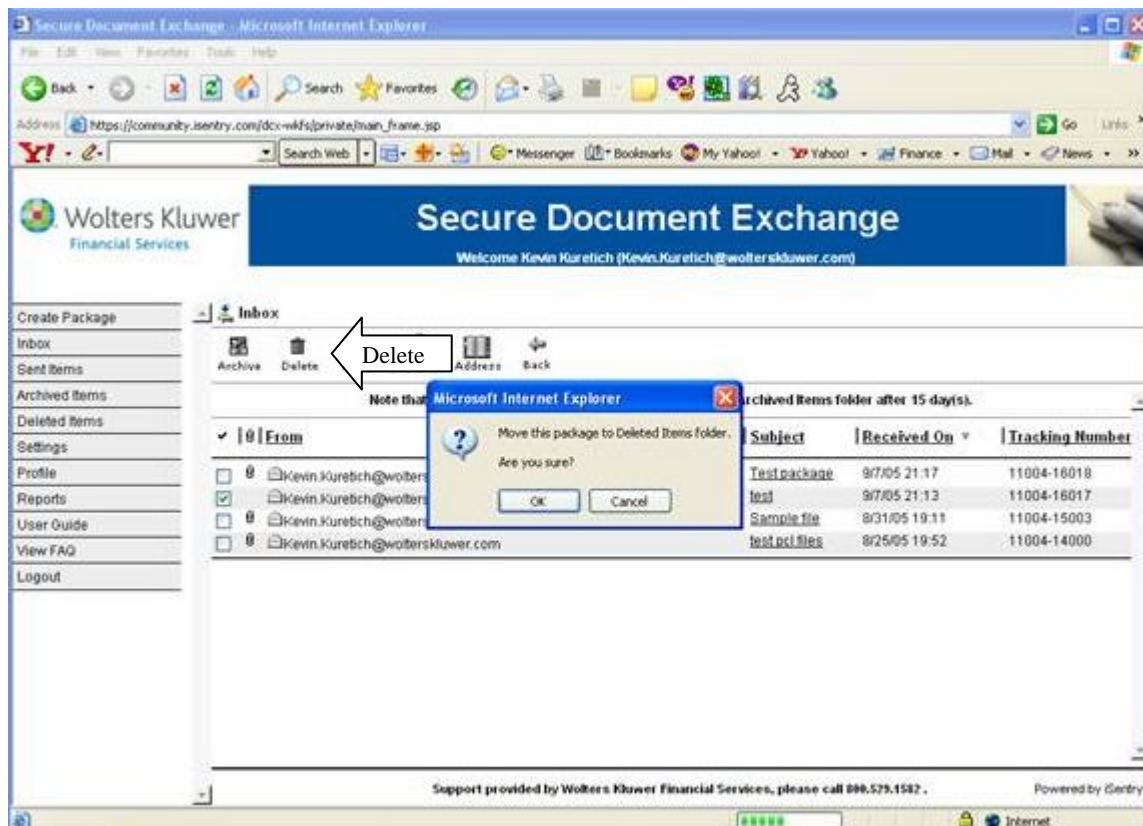
Deleting Messages

You can *temporarily* delete messages from the Inbox, Sent Items and Archived Items folders and move them to your Deleted Items folder.


To delete messages from the Inbox or other folders (except the Deleted Items folder):

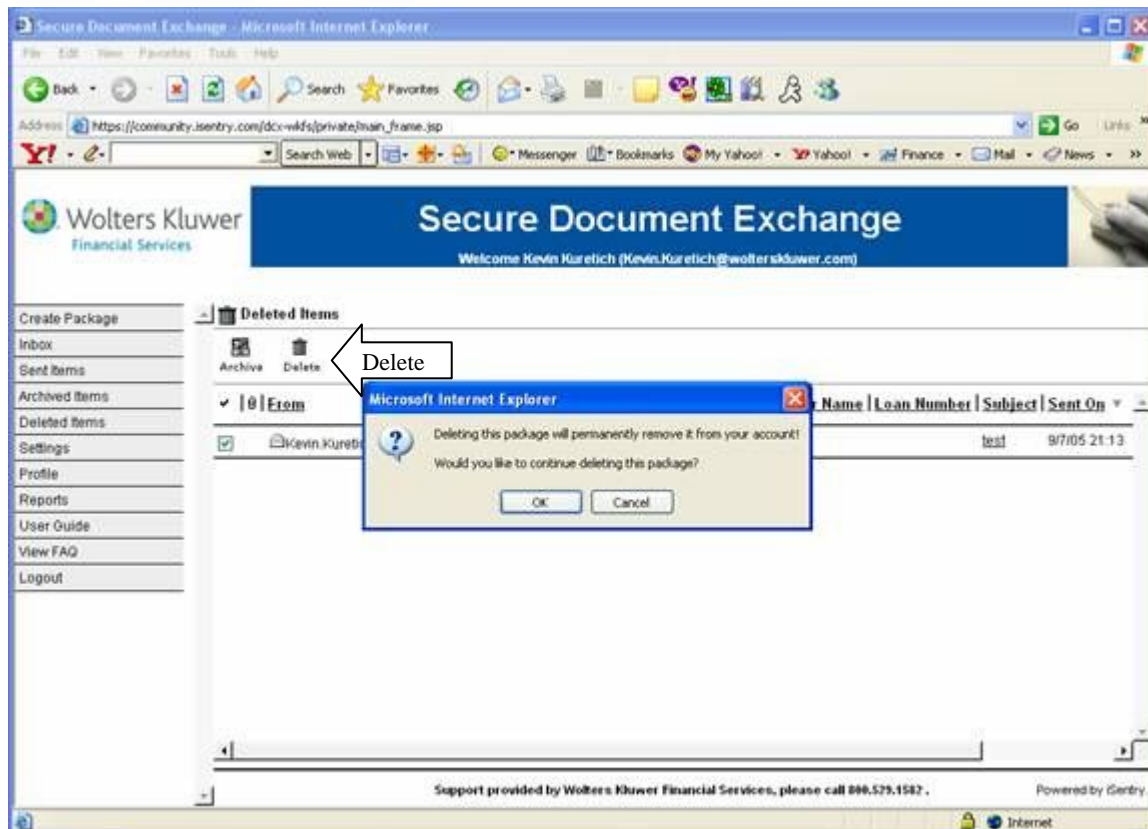
3. Click the Inbox, Sent Items, or Archived Items link from the left navigation bar and select the message(s) you want to delete.
 - To select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
 - To select or deselect all messages, click the icon.

4. Click the Delete button . You will be presented with a confirmation pop-up box.
 - Click the OK button if you want to move the selected messages to your Deleted Items folder.
 - Click the Cancel button if you do not wish to move the message(s) to your Deleted Items folder.





To *permanently* remove deleted messages:

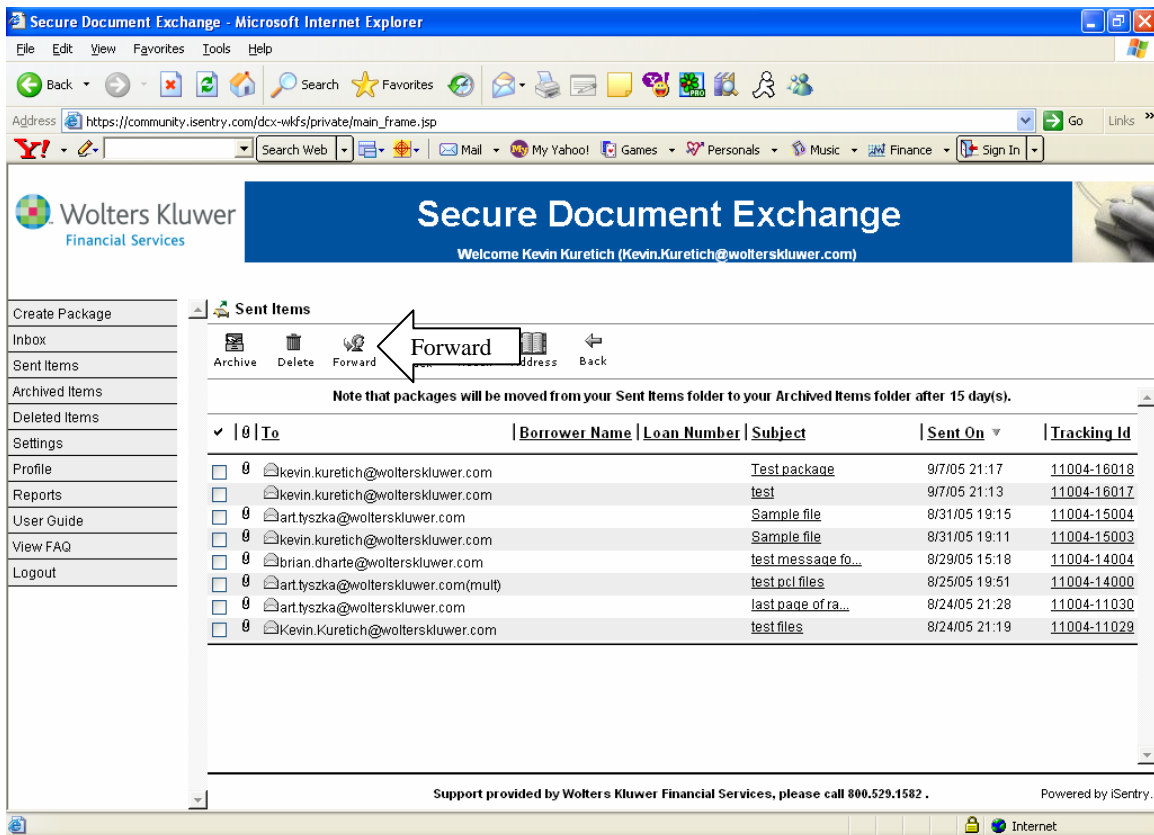
1. Click the Deleted Items link from the left navigation bar and select the message(s) you want to permanently delete.
 - To select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
 - To select or deselect all messages, click the icon.
2. Click the Delete button . You will be presented with a confirmation pop-up box.
 - Click the OK button if you want to permanently remove the selected messages from your account.
 - Click the Cancel button if you do not wish to permanently remove the message(s) from your account.





Forward Message


To forward a package you previously sent, click on the 'Sent Items' link on the left navigation bar.:


1. Choose the message(s) you intend to forward:
 - To select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
 - To select or deselect all messages, click the  icon.
2. Click the Forward button  and you will be taken to the Create Package - Forward screen.



<input type="checkbox"/>	To	Borrower Name	Loan Number	Subject	Sent On	Tracking Id
<input type="checkbox"/>	kevin.kuretech@wolterskluwer.com			Test package	9/7/05 21:17	11004-16018
<input type="checkbox"/>	kevin.kuretech@wolterskluwer.com			test	9/7/05 21:13	11004-16017
<input type="checkbox"/>	art.tyszka@wolterskluwer.com			Sample file	8/31/05 19:15	11004-15004
<input type="checkbox"/>	kevin.kuretech@wolterskluwer.com			Sample file	8/31/05 19:11	11004-15003
<input type="checkbox"/>	brian.dharte@wolterskluwer.com			test message fo...	8/29/05 15:18	11004-14004
<input type="checkbox"/>	art.tyszka@wolterskluwer.com (mult)			test pcl files	8/25/05 19:51	11004-14000
<input type="checkbox"/>	art.tyszka@wolterskluwer.com			last page of ra...	8/24/05 21:28	11004-11030
<input type="checkbox"/>	Kevin.Kuretech@wolterskluwer.com			test files	8/24/05 21:19	11004-11029

3. Click on the To text box and fill in the Forward recipient email address(es), or
 - a. Click on the 'Address' button , choose the address(es) from your personal address book and click 'Send To' button 
4. To change or add to the Subject box content, click in the Subject text box and type in the new subject line text.
5. To change or add to the Message text box content, click in the Messages text box, and type in the new text of the message.



6. To add an attachment/file, click the Attach button  choose the file you wish to attach to the message. You may [View](#) or [Remove](#) the file by clicking on the appropriate link.

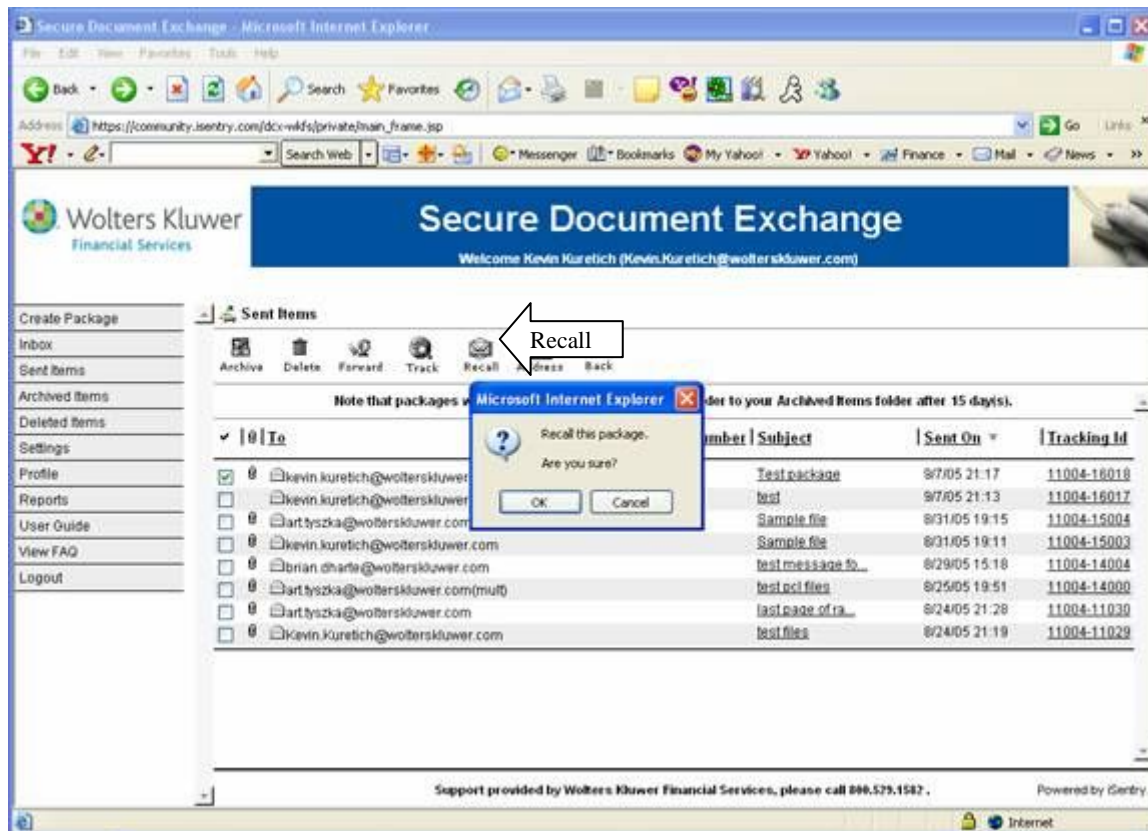
7. Click the Send button  when you are ready send the message.

8. The message will now be in your Sent Items folder.

Recalling a Message


To Recall a sent message before all recipients have viewed the message:

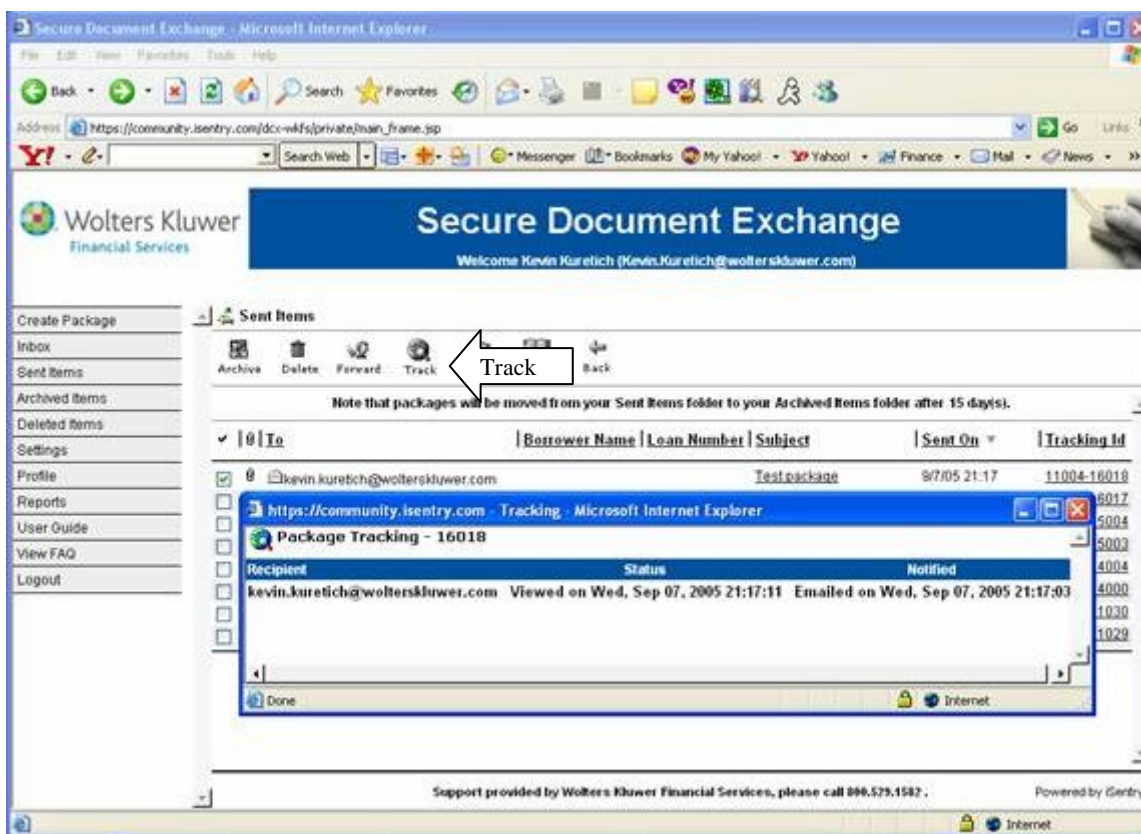
1. Click the Sent Items link from the left navigation bar and select the message(s) you want to recall.
 - To select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
 - To select or deselect all messages, click the icon.
2. Click the Recall button . You will be presented with a confirmation pop-up box.
 - Click the OK button if you want to recall the selected messages.
 - Click the Cancel button if you do not wish to recall the message(s).
3. The Recalled message(s) will be indicated by the  symbol in the To column.



Tracking a Message

To Track the status of a sent message(s):

4. Click the Sent Items or Archived Items link from the left navigation bar and select the message you want to Track.
 - Select a single message, click its checkbox.
 - To deselect a message, click its selected checkbox.
5. Click the Track button  and you will be presented with a Package Tracking pop-up box for the selected message.
6. The message tracking detail includes:
 - Message Recipients
 - Message Status - Waiting, Received, Deleted, Archived, Purged, Recalled or Received/Recalled (the sender has recalled the message but at least one recipient has viewed the package)
 - Notification Date



Sent Message Settings

To modify the Sent Message Settings (e.g. formatting, number of views, and read receipts), click the Settings link on the left navigation bar.

Message Formatting

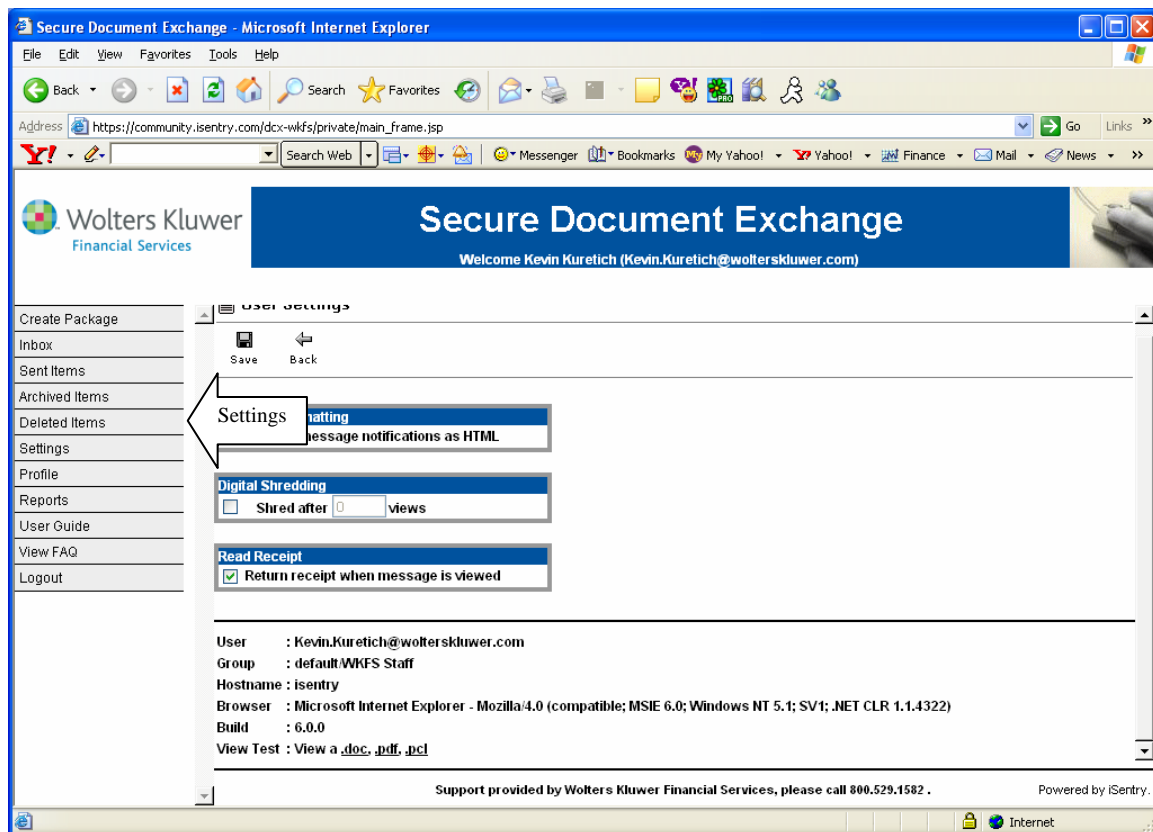
To send message notifications to recipients in HTML, thus allowing for branded notifications, click the checkbox preceding 'Send message notification as HTML'.

Message Viewing Limit

To limit the number of instances that a message is viewed, click the checkbox preceding 'Shred after' and enter the applicable number of viewing instances in the Shred after text box.

Read Receipt

To receive notification each time a recipient has viewed a Sent message, click the checkbox preceding 'Return receipt when message is viewed'.




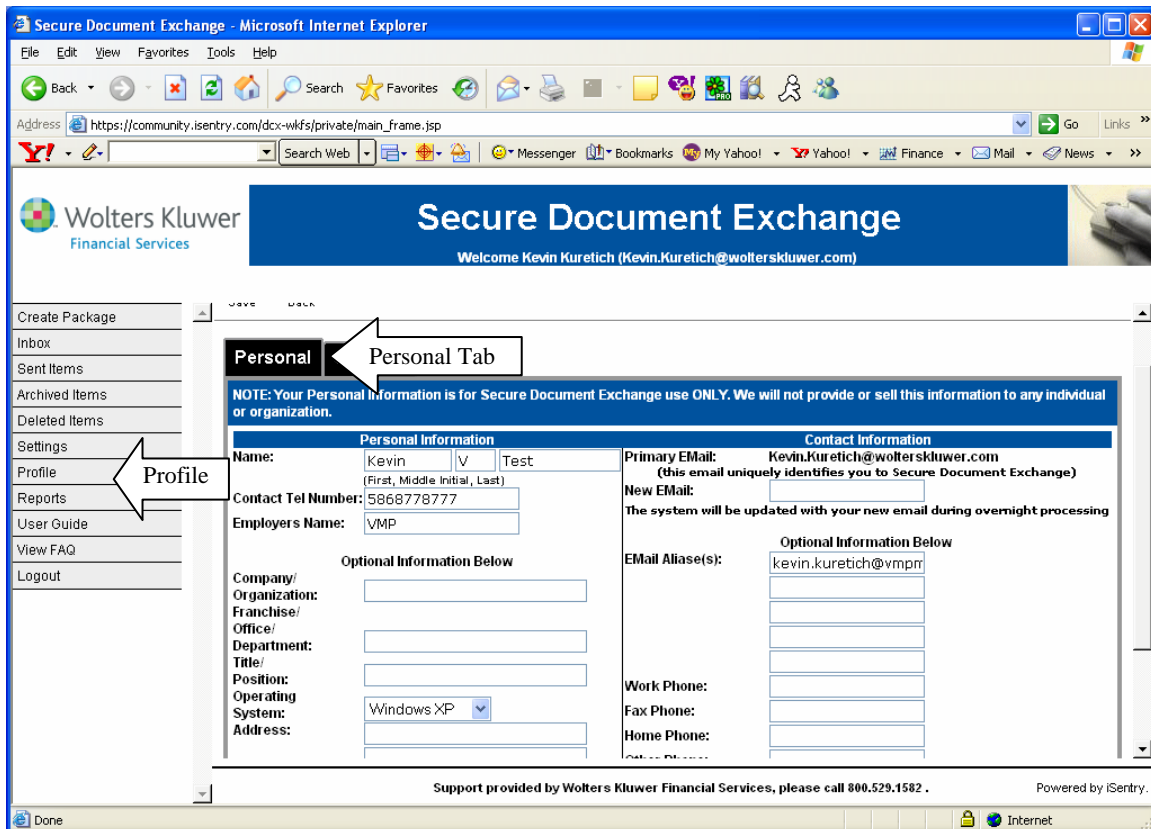
User Profile

To modify the User Profile (e.g. contact information, password reset), click the Profile link on the left navigation bar.

Personal Information

To change/update your contact information (e.g. phone numbers, address and email aliases) click on the Personal tab and enter the applicable text box for the information

to be modified, enter the correct text and click on the Save button .



Secure Document Exchange - Microsoft Internet Explorer

Address: https://community.isentry.com/dcx-wkfs/private/main_frame.jsp

Wolters Kluwer Financial Services

Secure Document Exchange

Welcome Kevin Kuretech (Kevin.Kuretech@wolterskluwer.com)

Create Package

Inbox

Sent Items

Archived Items

Deleted Items

Settings

Profile

Reports

User Guide

View FAQ

Logout

Personal Personal Tab

NOTE: Your Personal Information is for Secure Document Exchange use ONLY. We will not provide or sell this information to any individual or organization.

Personal Information	Contact Information
Name: Kevin V Test (First, Middle Initial, Last)	Primary Email: Kevin.Kuretech@wolterskluwer.com (this email uniquely identifies you to Secure Document Exchange)
Contact Tel Number: 5868778777	New Email: <input type="text"/>
Employers Name: VMP	The system will be updated with your new email during overnight processing
Optional Information Below	
Company/Organization: <input type="text"/>	Email Alias(s): kevin.kuretech@vmpm
Franchise/Office/Department: <input type="text"/>	<input type="text"/>
Title: <input type="text"/>	<input type="text"/>
Position: <input type="text"/>	Work Phone: <input type="text"/>
Operating System: Windows XP	Fax Phone: <input type="text"/>
Address: <input type="text"/>	Home Phone: <input type="text"/>


Support provided by Wolters Kluwer Financial Services, please call 800.529.1582 . Powered by iSentry.

Password Reset


To change your Password, click the Security tab.

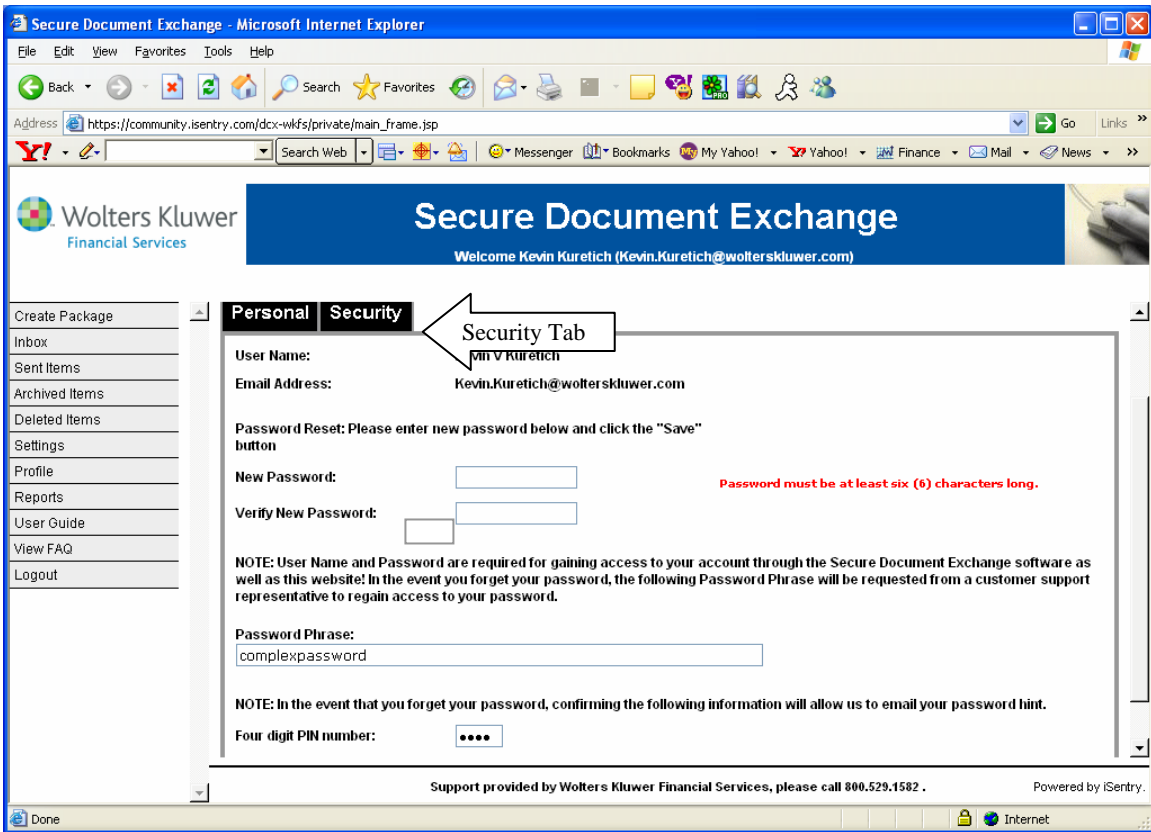
You have two text boxes which must be filled in. Please note that your password must be at least six (6) characters long:

- Enter your New Password
- Verify our New Password

After entering your new password information click on the Save button  and you will receive a confirmation pop-up box of your saved activity.

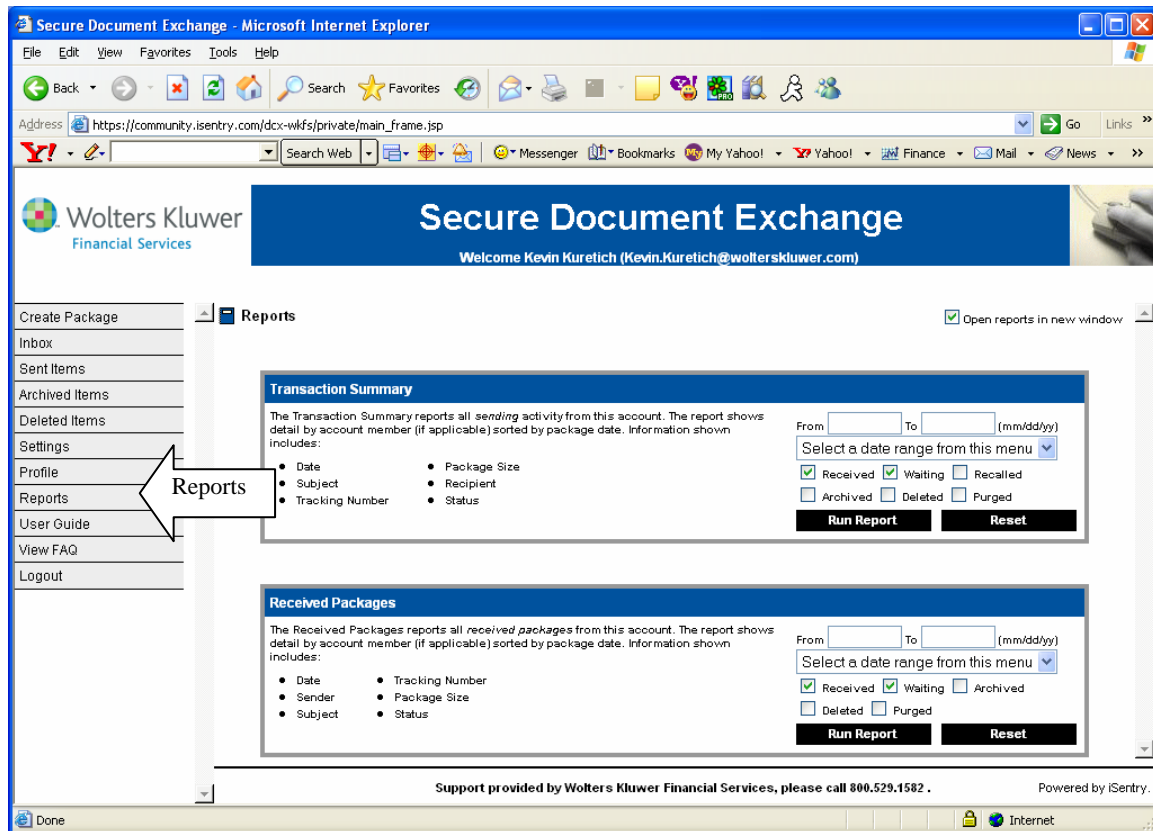
You may also add/modify your Password Phrase (password hint) by clicking on the Password Phrase text box and entering your new phrase.

After entering your new password information click on the Save button  and you will receive a confirmation pop-up box of your saved activity.



Reports

To get a summary report of messages sent or received, click the Reports link on the left navigation bar.

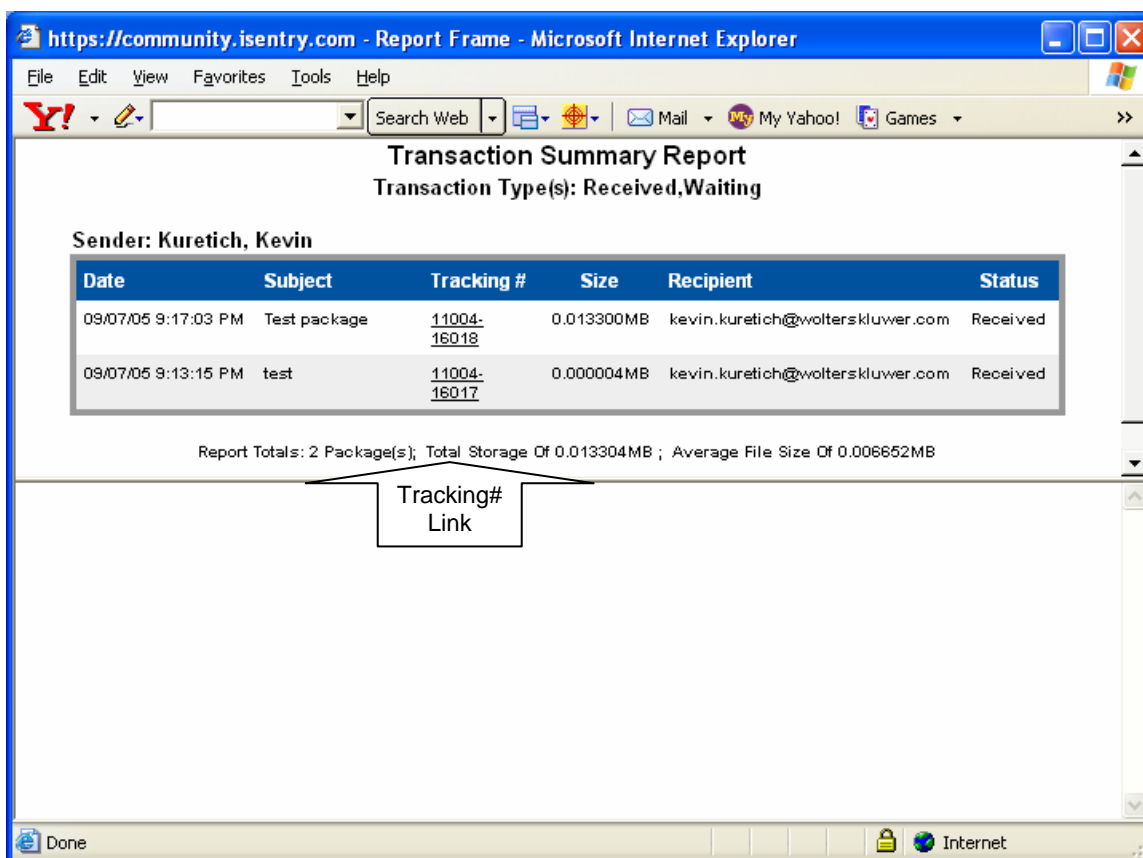


Transaction Summary Report

To retrieve a summary report of message sending activity:

1. Click on the From and To text boxes to enter the date ranges for the message information you would like to receive or
 - a. Choose **Today**, **This Week**, **This Month** or **This Year** from the 'Select a date range from this menu' drop-down box
2. Indicate the applicable message statuses that you would like to retrieve:
 - **Received** - at least one recipient has viewed the package
 - **Waiting** - no recipients have yet viewed the package
 - **Recalled** - the sender has recalled the package before any recipient viewed the package
 - **Archived** - the sender has moved the package to their archived folder
 - **Deleted** - the sender has moved the package to their deleted folder
 - **Purged** - the sender has purged the package from the system.
3. Click on the Run Report button and you will receive the report output.
4. You will be presented with a summary report (sample follows) which includes:
 - **Date** - the date on which the message/attachment was sent

- **Subject** - the subject line of the message
- **Tracking Number** - click on the [Tracking #](#) link for an individual message to open/view the message content.
- **Size** - the total size of the message/attachments. The size is determined by totaling the size of all attachments and the message body.
- **Recipient** - the email address of the recipient(s) of the message/attachment.
- **Status** - the status of the message/attachment



Received Packages Report

To retrieve a summary report of messages received or waiting to be received:

1. Click on the From and To text boxes to enter the date ranges for the message information you would like to receive or
 - a. Choose **Today**, **This Week**, **This Month** or **This year** from the 'Select a date range from this menu' drop-down box
2. Indicate the applicable message statuses that you would like to retrieve:
 - **Received** - at least one recipient has viewed the package
 - **Waiting** - no recipients have yet viewed the package
 - **Archived** - the sender has moved the package to their archived folder
 - **Deleted** - the sender has moved the package to their deleted folder
 - **Purged** - the sender has purged the package from the system.
3. Click on the Run Report button and you will receive the report output.
4. You will be presented with a summary report (sample follows) which includes:

- **Date** - the date on which the message/attachment was sent
- **Sender** - the primary email address of the User that created the secure package.
- **Subject** - the subject line of the message
- **Tracking Number** - click on the [Tracking #](#) link for an individual message to open/view the message content.
- **Size** - the total size of the message/attachments. The size is determined by totaling the size of all attachments and the message body.
- **Status** - the status of the message/attachment

https://community.isentry.com - Report Frame - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Transaction Summary Report

Transaction Type(s): Received,Waiting

Sender: Tyszka, Arthur

Date	Subject	Tracking #	Size	Recipient	Status
09/07/05 5:16:21 PM	Recipient Name=Tyszka:Borrower Name=McGuinness:Loan Number=6578786:Comment=RESPA Docs	11003-16016	0.030763MB	art.tyszka@wolterskluwer.com	Waiting
09/07/05 5:15:25 PM	Recipient Name=Tyszka:Borrower Name=Pawlowski:Loan Number=32654978:Comment=Closing Docs	11003-16015	0.030763MB	art.tyszka@wolterskluwer.com	Waiting
09/07/05 5:14:45 PM	Recipient Name=Tyszka:Borrower Name=Schuster:Loan Number=3224864654:Comment=HUD 1	11003-16014	0.512696MB	art.tyszka@wolterskluwer.com	Received
09/07/05 5:12:54 PM	Recipient Name=Tyszka:Borrower Name=Hartford:Loan Number=365126742:Comment=RESPA Package	11003-16013	1.101895MB	art.tyszka@wolterskluwer.com	Received

From art.tyszka@wolterskluwer.com
To art.tyszka@wolterskluwer.com
Borrower Name McGuinness
Loan Number 6578786
Subject RESPA Docs
Attachment(s) SecFundVMP(1004).doc

Internet