Tempo 25.2 Release Notes

Version 1

Release Date: March 8, 2025

SAGENT

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Release Summary

The following areas are impacted with this release.

Product	Description of Product
Core	Any functionality that is common to all modules, display at loan level, administration, and reporting

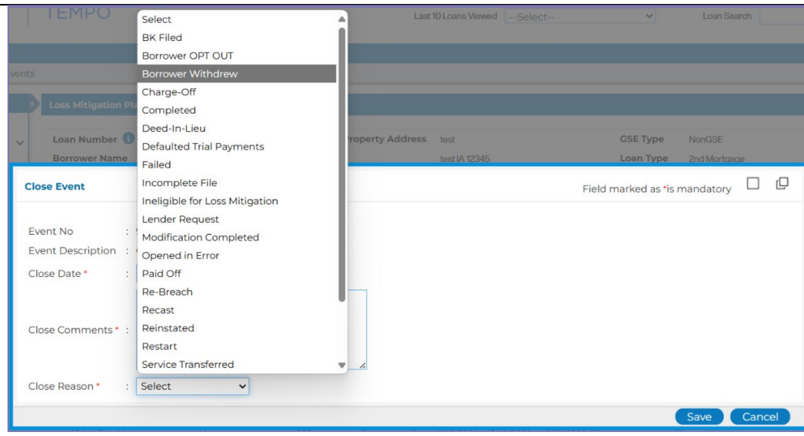
Please submit any questions or findings to Sagent at https://sagentsupport.service-now.com/csm.

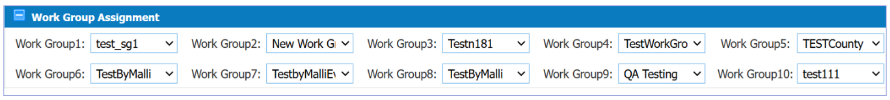
Dara Claims and Dara Loss Mitigation are add-on features. If interested, please contact your Sagent Customer Success Manager.

Core

Features

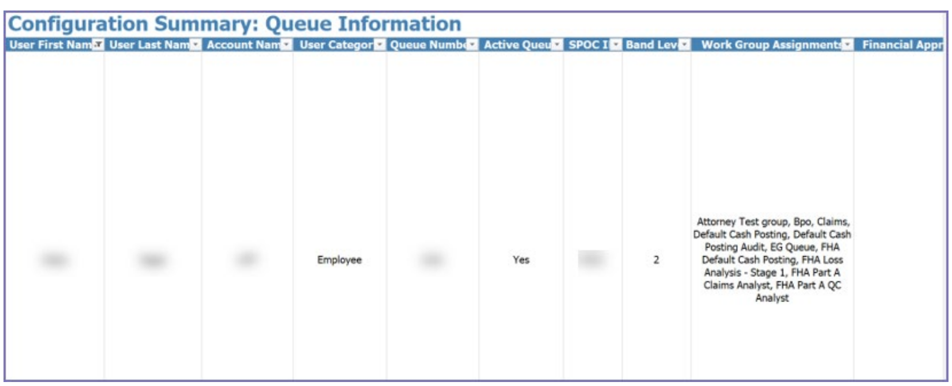
Feature 326763	Add/Update 'Close Reason' selections when Closing Event 999
Description	This enhancement provides users with more selections in order to better identify the reason for closing a referral. New **Close Reasons** are available for **Event 999** on the **Close Event** pop up screen. The reasons are listed in alphabetical order on the **Close Reason** drop down. Following are the new **Event 999 Close Reasons** added to the dropdown: • Borrower Withdrew • Ineligible for Loss Mitigation • Recast • Restart • VASP

	 The new **Event 999 Close Reasons** are also added under the **Bulk Milestone Tracking Template** on the **Read Me file** tab.
Testing Considerations	**Negative Testing:** Add or Update Close Reason upon closing Event 999 to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo. 2. Go to the Referral and to the Event Template. 3. Go to the Event 999 and close it. 4. The New/Updated Close Reasons: Recast, Restart, Borrower Withdrew, Ineligible for Loss Mitigation and VASP can be selected. 5. Select the New/Updated Close Reasons and verify the Referral closes successfully. 6. The New/Updated options are also added to the Bulk Milestone Template. 7. Complete the Bulk Milestone Template, referring to the ReadMe for guidance, and verify the Referral closes successfully.

<table>
<tr><td>Feature 538389</td><td>Increase Work Group Queue Configuration from 4 available options to 10</td></tr>
<tr><td>Description</td><td>This enhancement improves efficiency by giving users the ability to access up to 10 work groups in their queue. Administrators can now configure up to 10 Work Groups on the Queue Creator screen. The Work Groups will be displayed in two rows and each row will have 5 workgroups.


Individual users will then have the option to select from a list of up to 10 work groups using the Select Work Group drop down within the Worklist Queue screen.

Canned Report:
In the Configuration Summary - Queue Information Canned Report, there will now be just one column/header for Work Group Assignments. When a user is assigned to multiple Work Groups, then each workgroup will be listed in that column and will be separated by a comma as shown below.


</td></tr>
<tr><td>Testing Considerations</td><td>Negative Testing:

Increase the size of the work group queue configuration to ensure no negative impact on the existing processes/flows.

Positive Testing:

1. Log in to Tempo.</td></tr>
</table>

	2. In the Shortcut Menu, navigate to Administration > User Set Up Builder > Queue Creator. 3. Under Queue Search, either enter a User's Queue Number or First Name and Last Name and click on Search. 4. Configure the Queue Assignment Criteria > Work Group Assignment section for the user to have 5+ Work Group Queues. 5. Go to Queue Management>Worklist Queue. 6. Verify the Work Groups configured in step 4 above are displayed within the Select Work Group drop down. 7. Confirm the Work Groups are pulling in the appropriate transactional items based on the Work Group Queue configurations.

Feature 496365	Prohibit Attorney Firms from Retiring Holds and Document Tracking Templates
Description	This feature provides functionality to prevent Attorney users from retiring **Holds** and **Document Tracking Templates**. Attorney users are restricted from clicking the Retire icons on the following screens. • **Document Tracking** screen – **Active Doc Tracking** tab. Attorneys are also not allowed to select the Document Tracking Templates or the Retire Document Template icon. • **Document Tracking> Doc Management** tab • **Holds** screen • **ECMS>Loan Documents** screen **Note:** This is applicable for any Role configured with the Attorney User profile.
Testing Considerations	**Negative Testing:** Add or update a Hold and Document Tracking to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo as an Attorney User. 2. Open a Hold or Document Tracking Template.

	3. Try to Retire the new Hold or Document Tracking Template. 4. Try to Retire any pre-existing Hold or Document Tracking Template opened by a Servicer.

Feature 535891	UI Enhancements for 25.2

Description	This feature introduces several enhancements to the Tempo UI to improve the user experience.
	
	• **Document Index Name Creation, Document Template Creation,** and **Document Template Mapping** sections have been moved to separate tabs under the **Document Management Creator** Screen.
	• Removed colons from the following screens:
	  o Loan Info screen - Attorney Info, Loan Info and Borrower Info, across all Loan and Referral level screens/shortcuts
	  o Borrower Info Screen
	  o Default Loan Info (DLI) Screen
	  o Financial Information - Payment Info Screen
	  o Asset Detail Screen
	In the **Administration>Configuration Builder>Comtag Creator** screen:
	  o All | A | B | C | , etc. have been removed from the top of the screen.
	  o A new **Quick** Search box and a **Clear** button are added above the columns.
	  o Users can search ALL the data fields within the Comtags screens by entering 3 consecutive characters and clicking on the search icon.
	  o Users can click the Clear button to remove the entries from the Search text box.
	• The system will remain on the **Event** screen when the user closes Event 918 on the Close Event popup screen.

Testing Considerations

Negative Testing:

Perform a normal function in the system to ensure no negative impact on the existing processes/flows. Review the screens for any colons.

Positive Testing:

1. Log in to Tempo.
2. Review the Borrower Info, Default Loan Info, Financial Information, Asset Detail and the 'i' icon for colons.
3. Admin > Comtag Creator: verify the A|B|C| bar has been removed and a Search field has been added. Search for a Comtag Description.
4. Admin > Document Management Creator: verify the screen is now separated into 3 tabs. Verify the functionality of the 3 areas works as expected.
5. Find a Foreclosure loan that has Event 918 in the Event Template. Close Event 918. The User should remain in the Event screen and not be directed to Loan Info.

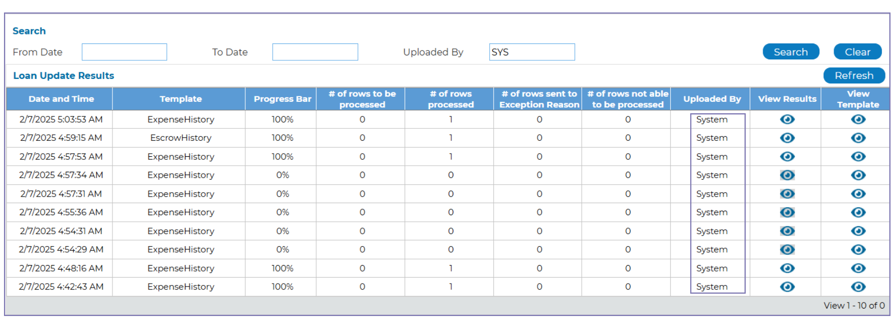
Feature 437962

Add ability to Search for 'System' Uploaded By in the Loan Updates Screen

Description

This enhancement improves search functionality by allowing users to search for a '**System'** username in the **Upload By** field within the **Data Management>Loan Updates** screen.

Users can also perform a search on the From Date and To Date field. The results will be displayed on the **Loan Updates Results** grid as shown below:



Search

From Date | To Date | Uploaded By: SYS | Search | Clear

Loan Update Results | Refresh

Date and Time	Template	Progress Bar	# of rows to be processed	# of rows processed	# of rows sent to Exception Reason	# of rows not able to be processed	Uploaded By	View Results	View Template
2/7/2025 5:03:53 AM	ExpenseHistory	100%	0	1	0	0	System		
2/7/2025 4:59:15 AM	EscrowHistory	100%	0	1	0	0	System		
2/7/2025 4:57:53 AM	ExpenseHistory	100%	0	1	0	0	System		
2/7/2025 4:57:34 AM	ExpenseHistory	0%	0	0	0	0	System		
2/7/2025 4:57:31 AM	ExpenseHistory	0%	0	0	0	0	System		
2/7/2025 4:55:36 AM	ExpenseHistory	0%	0	0	0	0	System		
2/7/2025 4:54:31 AM	ExpenseHistory	0%	0	0	0	0	System		
2/7/2025 4:54:29 AM	ExpenseHistory	0%	0	0	0	0	System		
2/7/2025 4:48:16 AM	ExpenseHistory	100%	0	1	0	0	System		
2/7/2025 4:42:43 AM	ExpenseHistory	100%	0	1	0	0	System		

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Testing Considerations	**Negative Testing:** Perform another standard Tempo function to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo. 2. Go to Data Management > Loan Updates. 3. Scroll down to the Search section. 4. Enter 'System' into the Uploaded By section and click Search. 5. If there are any templates loaded by 'System,' then they will appear on the Loan Updates Results grid.

Fixes

Fix 510375	DDF Configuration Summary Canned Report
Description	This project resolves an issue where the Transactional Trigger Details which are configured under the **DDF** were not showing on the Canned Report. Now the trigger details are visible on the **Canned Report> Configuration summary>DDF.**
Testing Considerations	**Negative Testing:** Perform a standard Tempo function to ensure no negative impact on the existing processes/flows. **Positive Testing:** 1. Log in to Tempo. 2. In the Shortcut Menu go to Reporting - Canned Reports. 3. Select the Report Name - Configuration Summary. 4. Select the Configuration Type of DDF and click on Run. 5. Verify the Transaction Triggers are visible/complete when comparing them to the Transaction Triggers configured under the Dynamic Data Field Creator - DDF Mappings.

Document History

This section details the history of the document at each version. It's good to know what has changed in each version and when it happened.

Version	Date	Changes
1	03/8/2025	N/A