



# **AIM+<sup>®</sup> 7.3**

Release Notes

August 19, 2018

**stewart<sup>®</sup>**

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# Table of Contents

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<b>AIM+ 7.3 Release Notes</b> .....	<b>1</b>
<b>Admin Tool</b> .....	<b>2</b>
Enabling SureClose Documents to Display in AIM+ .....	2
Part I: Enabling SureClose Documents to Display in the Documents Module .....	3
Part II: Configuring a SureClose Corporation in the Admin Tool .....	4
<b>Integrations</b> .....	<b>5</b>
SureClose Advantage.....	5
SureClose Placeholders in AIM+ Files .....	6
Customizing the Documents Screen View.....	8
IMPORTANT: Selecting a Template of SureClose in AIM+.....	9
Sending Documents from AIM+ to SureClose .....	10
Drag and Drop Documents from AIM+ into Available SureClose Placeholders .....	11
Drag and Drop Documents into Placeholders with One or More Files .....	12
Drag and Drop Documents from Consolidated Sets.....	12
Viewing SureClose Documents in AIM+ .....	13
Saving SureClose Documents from AIM+ .....	14
Emailing SureClose Documents from AIM+ .....	15
Opening a Secure Email from AIM+ .....	16
<b>Defects</b> .....	<b>18</b>
<b>Additional Information</b> .....	<b>19</b>
Accessing AIM+.....	19
Training.....	19
Technical Support.....	19

# AIM+ 7.3 Release Notes

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AIM+ 7.3 includes additional functionality, enhancements, and defect corrections. This document provides users with a brief explanation of what was fixed, and an introduction to new features and functionality implemented with this release.

**Deployment Date: August 19, 2018**

# Admin Tool

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## Enabling SureClose Documents to Display in AIM+

In AIM+ 7.3, you now have the ability to drag and drop documents from AIM+ to a SureClose Placeholder. You can also insert documents from your computer into a SureClose Placeholder through AIM+. Also, you can view all the SureClose documents against the order in AIM+. In addition, you can attach documents into an AIM+ email, and can save documents through AIM+.

To use these features, there are two prerequisites. These prerequisites do not need to be completed in any particular order, but must both be enabled to see the new SureClose features on the *Documents* screen in AIM+:

- [Part I](#): Select the new check box, Enable SureClose Document Display in the Admin Tool.
- [Part II](#): From the Admin Tool, you must configure the SureClose Corporation.

If you have access to the Admin Tool, use the steps below to give users in your company the ability to drag and drop, view and attach documents into SureClose Placeholders from AIM+.

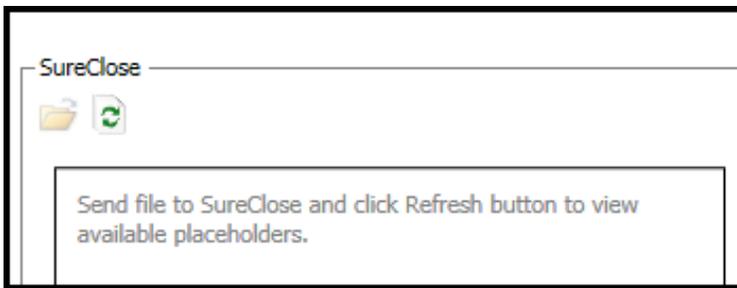
If you do not have access to the Admin Tool, contact your Administrator.

By completing the setup steps below for Part I and Part II, two new features display on the Documents screen of AIM+:

- A new tab, **SureClose Documents**.



- A new drag and drop grid, **SureClose**, for dropping in documents to Available SureClose Placeholders.



### Note

If you do not turn on these features in the *Admin Tool*, you will not see any change to the *Documents* screen in AIM+.

## Part I: Enabling SureClose Documents to Display in the Documents Module

Use the *Admin Tool* to enable SureClose documents to display in AIM+. By clicking the check box, **Enable SureClose Document Display**, you will be able to drag and drop documents from AIM+ into a SureClose Placeholder. You can also view SureClose documents from AIM+.

The screenshot shows the 'Edit Company' dialog box with the 'Company Detail' tab selected. The 'Name' field contains 'AimCompany', 'Company ID' is '1', and 'Company Code' is '00001'. The 'Agent Type' is 'Affiliated'. The 'License Code' field contains 'PEOT -- DWWJ -- LKQY -- EEOR -- RCSD -- WHXY' and 'Licenses' is '50'. The 'File Auto Close' dropdown is set to 'Settlement Agent Premium Disbursement'. The 'Enable SureClose Document Display' checkbox is checked and highlighted with a red box. Other checked options include 'Enable CPL', 'Enable SPARC', 'Enable Third Party Payee for Title Premium', 'Enable Abstract Received', 'Show Certification Language on HUD', 'Enable Save as Word feature', and 'Enable Creation of Final Closing Disclosure'. Unchecked options include 'Enable Policy Filtering by States', 'Enable File Search by Branch only', 'Enable Primary Party Check', 'Enable User Branch Access Filter', 'Enable Stewart Access Policy', and 'Enable Resware Directing Source'. 'OK' and 'Cancel' buttons are at the bottom right.

### Steps

1. From the *Admin Tool*, click **Security** to expand the folders.
2. Click the **Companies** folder.
3. From the *Companies* screen, click to select the company to edit.
4. Click **Edit Company**. The *Company Detail* pop-up displays.
5. From the *Company Detail* pop-up, select the check box, **Enable SureClose Document Display**.
6. With the **Enable SureClose Document Display** check box selected, click **OK**.
7. Complete [Part II](#) instructions, to **configure a SureClose Corporation**.



### Note

With a SureClose Corporation setup, and the Enable SureClose Document Display check box selected, you will see the new tab, and drag and drop box on the Documents screen of AIM+. You will not see or have access to these features if you do not complete both the configuration of a SureClose Corporation and the Enable SureClose Document Display check box selected.

## Part II: Configuring a SureClose Corporation in the Admin Tool

In addition to selecting the **Enable SureClose Document Display** check box in *Company Detail*, you also need to configure the SureClose Corporation. The steps in [Part I](#) and below will display the new SureClose features, viewable on the *Documents* screen in AIM+.

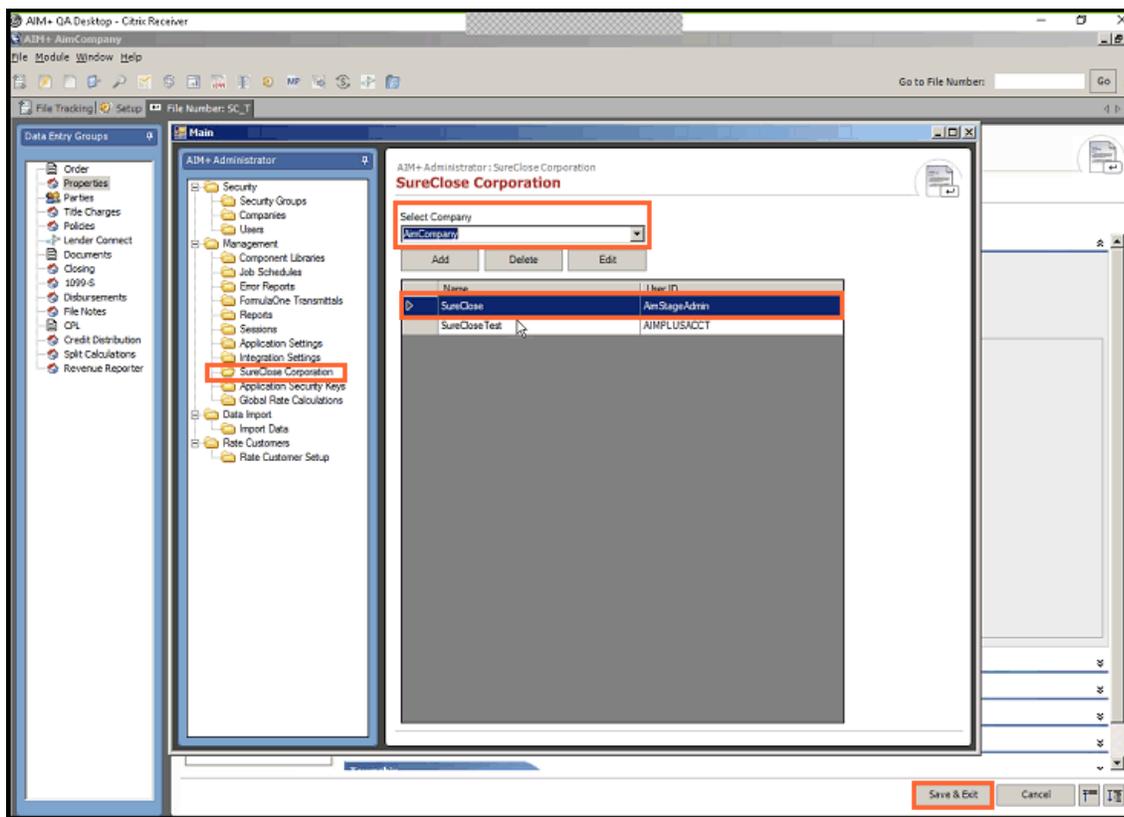


### Note

Sites using SureClose should already have this configuration set up.

### Steps

1. From the *Admin Tool*, click **Management** to expand the folders.
2. Click **SureClose Corporation**. The *SureClose Corporation* screen displays.
3. Use the *Select Company* drop-down to select the company to edit. The SureClose Corporations set up for the selected company display.
4. Select the **SureClose Corporation**.



By selecting the **Enable SureClose Document Display** check box, and configuring a **SureClose Corporation**, the new SureClose features display on the *Documents* screen. For more information on how to use the new SureClose features, refer to the section below, [SureClose Advantage](#).



### Note

If no SureClose Corporations are set up for the company, you can add a SureClose Corporation to set up.

# Integrations

## SureClose Advantage

In this release of AIM+ 7.3, you can view or insert documents from your computer into SureClose Placeholders using AIM+. You can also attach documents in AIM+ or files on your computer into emails sent from AIM+.



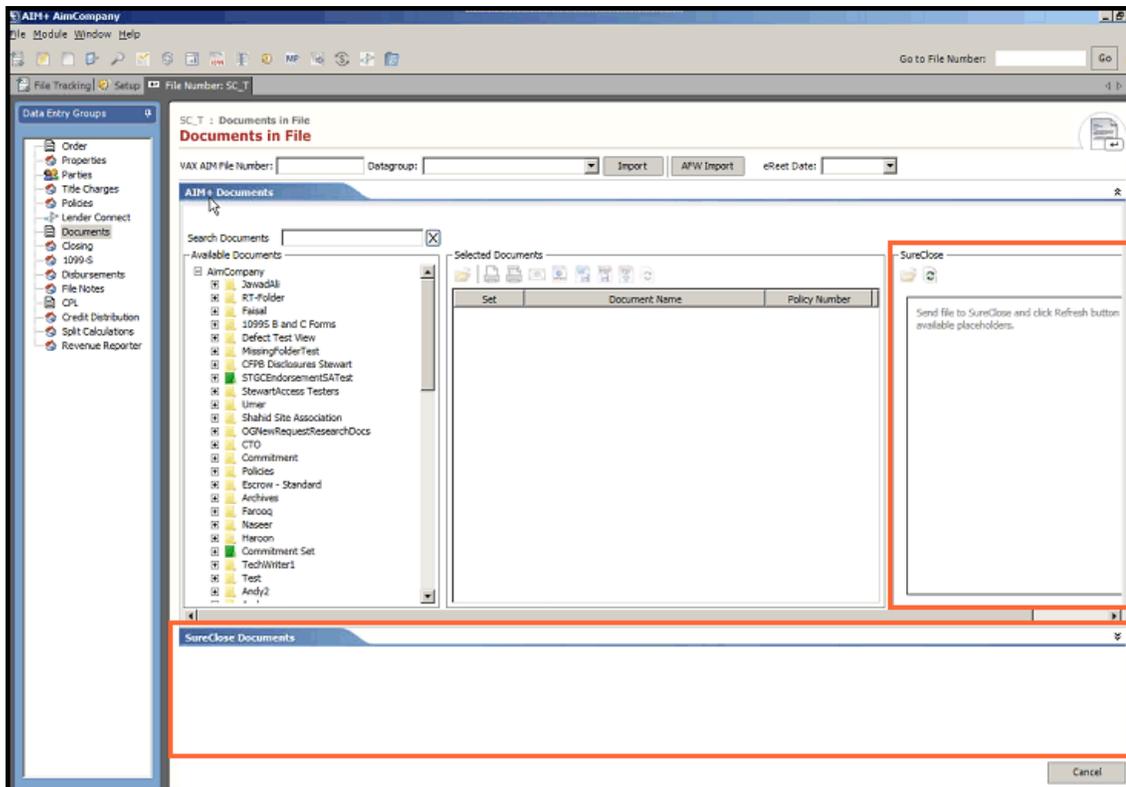
### Note

To view or use these new SureClose features, they must be enabled in the Admin Tool. You will not see any difference to the Documents screen in AIM+ if you do not turn on these features in the Admin Tool. If you do not have access to the Admin Tool and would like to use these SureClose integration features, contact your Administrator.

**IMPORTANT:** SureClose Placeholders need to be set up in SureClose first, before displaying in the SureClose grid.

With these SureClose integration features enabled, two new additions display on the Documents screen in AIM+:

- A new drag and drop box, **SureClose** – This box displays SureClose Placeholders that are available for dragging and dropping documents from AIM+ into SureClose Placeholders. You can also add documents from your computer into a SureClose Placeholder using the Folder icon under this box.
- A new tab, **SureClose Documents** – This tab displays documents that have been filed in SureClose or have been uploaded from AIM+.



## SureClose Placeholders in AIM+ Files

A new **SureClose** grid, and **SureClose Documents** tab have been added to the *Documents* screen in AIM+. The SureClose grid displays Available SureClose Placeholders that you can add documents to. The SureClose Documents tab displays SureClose documents that you can save or email using AIM+ email. You can also add documents from your computer to a placeholder using the SureClose grid.



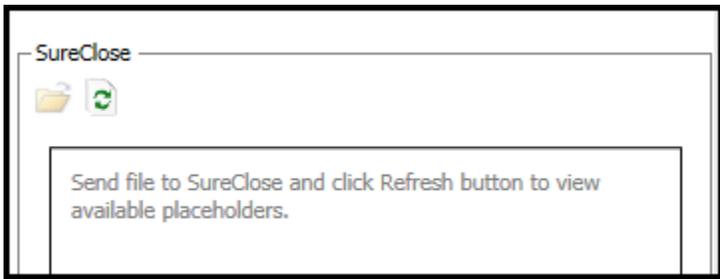
### Note

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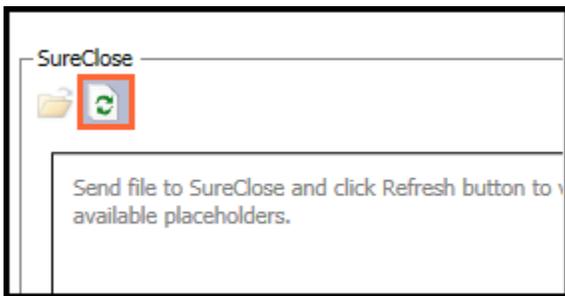
SureClose Placeholders that display in the SureClose grid in AIM+ must first be created in SureClose Advantage.

## SureClose Grid

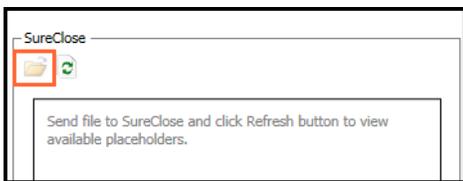
The new SureClose grid displays available SureClose Placeholders for adding documents to. The documents added into these SureClose Placeholders from AIM+ are also viewable in SureClose Advantage.



Under the *SureClose grid*, click the **Refresh Placeholders List** button to view the SureClose Placeholders that are available to add documents to in AIM+. This is useful if the file was recently sent to SureClose or additional placeholders have been added in SureClose. The documents added to these SureClose Placeholders are also viewable in SureClose Advantage.



Use the **Open** button to add documents from your computer to any of the Available Placeholders in the SureClose grid.



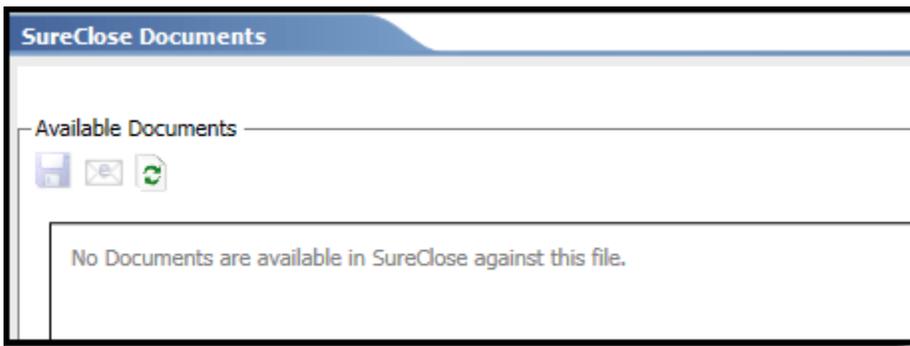
## SureClose Documents Tab

The SureClose Documents tab is an expandable/collapsible tab that displays documents you have uploaded to SureClose against Available Placeholders, or from your computer directly into AIM+.



Click to expand the tab, and use any of the additional features:

- **Save** – Save uploaded documents from the SureClose Documents tab to a folder on your computer. You can select more than one document at a time to save onto your computer.
- **Email** – Select a document listed under the *SureClose Documents* tab. Then click the **Email** button to attach the selected document to an AIM+ email template. You can select more than one document at a time to an AIM+ email template.
- **Refresh Documents List** – Click the **Refresh Documents List** button after uploading documents to make sure the most recently updated copy is available for emailing or sending to a SureClose Placeholder within AIM+.



### Note

The buttons, **Save**, and **Email**, become enabled after a document is uploaded to the SureClose Documents tab. You can click the **Refresh Documents List** button at any time to view more documents that might be available in SureClose for this file.

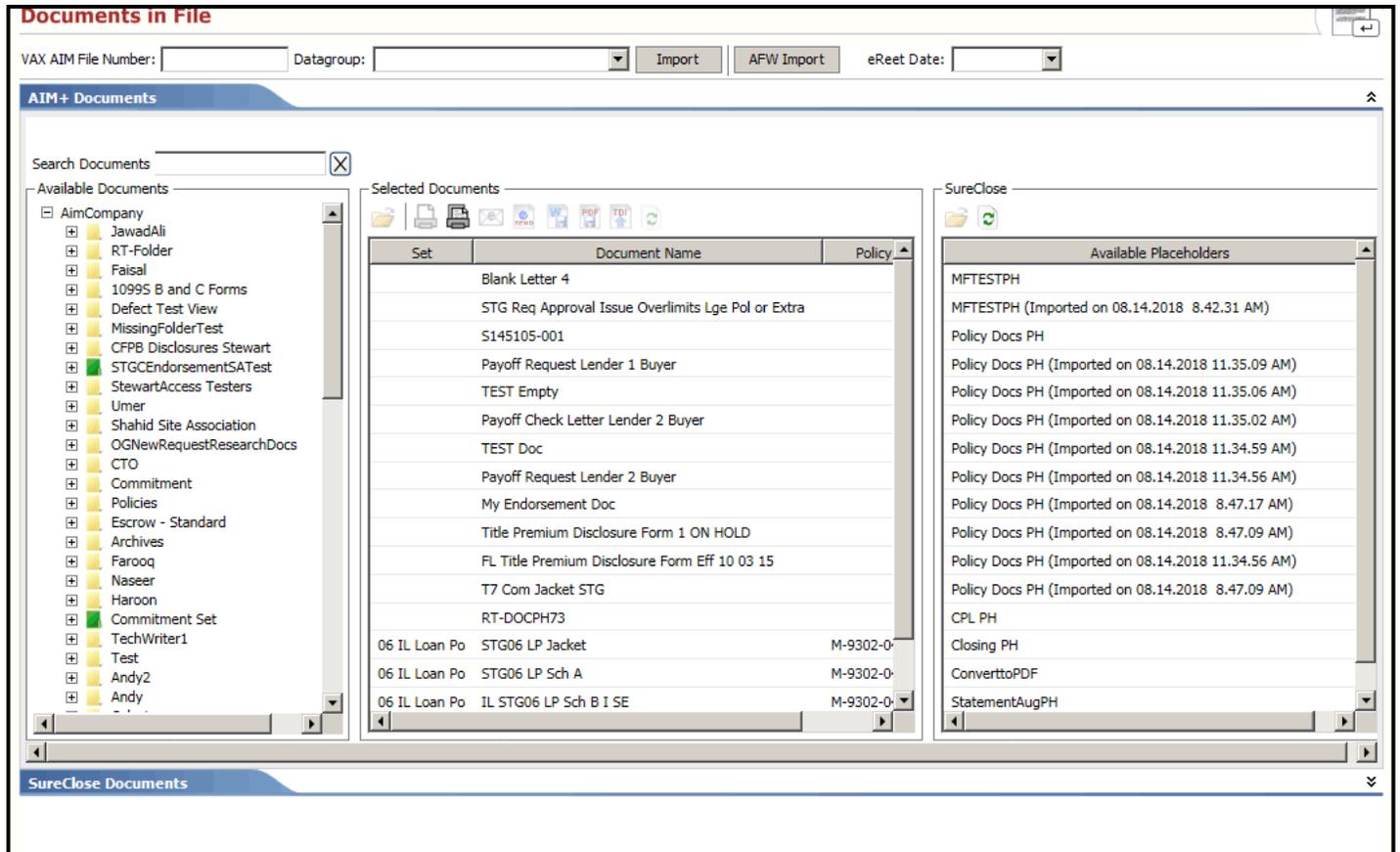
Documents that are uploaded to in SureClose Advantage (to Placeholders that are already available in AIM+) will also display in the SureClose Documents tab. If you add a document from your computer to a SureClose Placeholder (in SureClose), simply click the **Refresh Documents List** button in AIM+ to update the list of Available Documents. Placeholders added against the newly uploaded files in SureClose also display in the Available Placeholders section of the SureClose grid.

## Customizing the Documents Screen View

Several options have been added to help you customize the view of your Documents screen, with the SureClose features enabled.

**Collapse or expand, left or right** – Expand or collapse sections of the *Documents* screen from left or right. Simply hover your cursor over the line that divides one or more sections of the Documents screen to activate the double arrows icon . Click, hold and drag the double arrows to customize (expand or collapse) your workspace on the Documents screen.

**New Scroll bars** – A horizontal scroll bar, located above the *SureClose Documents* tab, has been added for better visibility. Vertical and horizontal scroll bars have also been added to the *Available Documents* section.



The screenshot displays the 'Documents in File' interface. At the top, there are input fields for 'VAX AIM File Number', 'Datagroup', and 'eReet Date', along with 'Import' and 'AFW Import' buttons. Below this is the 'AIM+ Documents' section, which includes a search bar and a tree view of 'Available Documents' under 'AimCompany'. The 'Selected Documents' table is shown below, with columns for 'Set', 'Document Name', and 'Policy'. The 'SureClose' section on the right contains a list of 'Available Placeholders' with their respective import dates and times.

Set	Document Name	Policy
	Blank Letter 4	
	STG Req Approval Issue Overlimits Lge Pol or Extra	
	S145105-001	
	Payoff Request Lender 1 Buyer	
	TEST Empty	
	Payoff Check Letter Lender 2 Buyer	
	TEST Doc	
	Payoff Request Lender 2 Buyer	
	My Endorsement Doc	
	Title Premium Disclosure Form 1 ON HOLD	
	FL Title Premium Disclosure Form Eff 10 03 15	
	T7 Com Jacket STG	
	RT-DOCPH73	
06 IL Loan Po	STG06 LP Jacket	M-9302-0
06 IL Loan Po	STG06 LP Sch A	M-9302-0
06 IL Loan Po	IL STG06 LP Sch B I SE	M-9302-0

Available Placeholders
MFTESTPH
MFTESTPH (Imported on 08.14.2018 8.42.31 AM)
Policy Docs PH
Policy Docs PH (Imported on 08.14.2018 11.35.09 AM)
Policy Docs PH (Imported on 08.14.2018 11.35.06 AM)
Policy Docs PH (Imported on 08.14.2018 11.35.02 AM)
Policy Docs PH (Imported on 08.14.2018 11.34.59 AM)
Policy Docs PH (Imported on 08.14.2018 11.34.56 AM)
Policy Docs PH (Imported on 08.14.2018 8.47.17 AM)
Policy Docs PH (Imported on 08.14.2018 8.47.09 AM)
Policy Docs PH (Imported on 08.14.2018 11.34.56 AM)
Policy Docs PH (Imported on 08.14.2018 8.47.09 AM)
CPL PH
Closing PH
ConverttoPDF
StatementAugPH



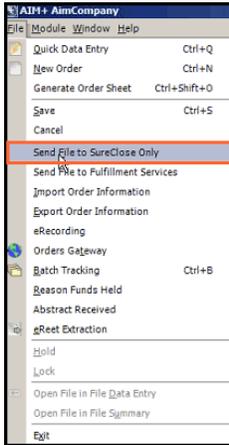
SureClose Placeholders that display in the SureClose grid in AIM+ must first be created in SureClose Advantage.

## IMPORTANT: Selecting a Template of SureClose in AIM+

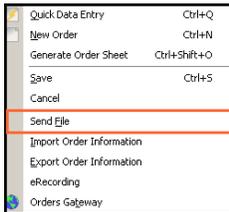
After setup in the Admin Tool is complete, and *before* you use the new SureClose features, you must first send a file to SureClose from AIM+. Follow the steps below to send a file to SureClose from AIM+.

### Steps

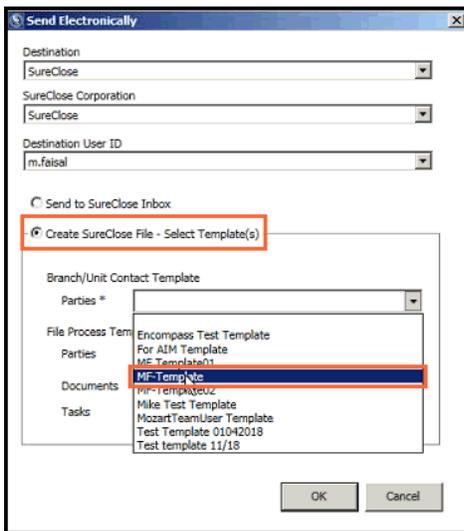
1. With the desired file open in AIM+, use the **File** drop-down to select **Send File to SureClose Only**. The *Send Electronically* pop-up displays.



Independent Agency users: please select **Send File** from the *File* drop-down menu.

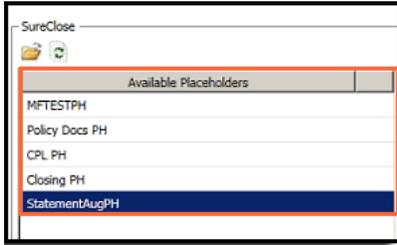


2. From the *Send Electronically* pop-up, click the radio button **Create SureClose File – Select Template(s)**.
3. From the *Parties* drop-down, select the Template that has a SureClose Corporation added, and that gives Full Access on this template.



4. Click **OK** to continue. A pop-up message displays, confirming the template was successfully sent to SureClose.
5. Click **OK**. SureClose will display Placeholders to AIM+ that contain the template sent in Step #3 above.

- From the *Documents* screen, click the **Refresh Placeholders List** button on the new SureClose grid. Available Placeholders display in the grid that contain the template you sent to SureClose.



**Note**

Templates must be set up in SureClose. Be sure that the Template you use has been setup with Full Access with corporation.

## Sending Documents from AIM+ to SureClose

Use the **Open** button under the *SureClose* grid to add documents from your computer to any of the Available Placeholders in the SureClose grid.



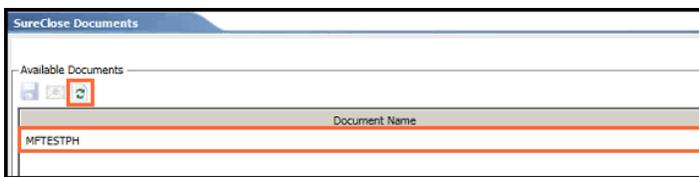
**Note**

The **Open** button is disabled until this grid is populated with Available Placeholders and any Placeholder is selected. If you attempt to attach a file type that is not currently supported, a yellow message displays, confirming the error.



## Steps

- After selecting a template of SureClose, with Available Placeholders displayed in the SureClose grid, select a Placeholder.
- Under the *SureClose* grid, click the **Open** button.
- Locate the file on your computer or network drive that you want to attach to the Placeholder (.pdf, .xlsx, .docx, or .pptx file types *only*).
- Click **Open**. A yellow message displays, confirming the document was successfully transmitted (added to the Placeholder).
- From the *Documents* screen, the document uploaded displays under the **SureClose Documents** tab, under *Available Documents*. You can also click the **Refresh Documents List** button under this tab to view uploaded, available documents.





## Note

Do not upload, or drag & drop Excel, Word and PPT documents from AIM+ to a placeholder that is configured for conversion of documents to PDF. PDF documents work best for such placeholders.

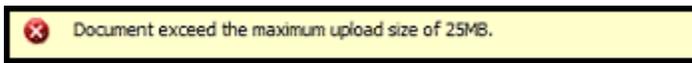
## Drag and Drop Documents from AIM+ into Available SureClose Placeholders

You can quickly drag and drop documents from your computer, or desktop into Available SureClose Placeholders.



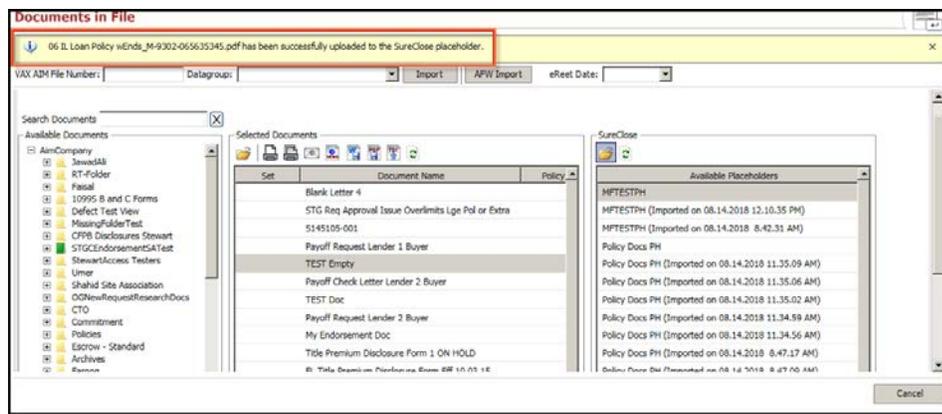
## Note

The maximum file size of documents added to placeholders using the drag and drop feature cannot exceed 25MB. If you attempt to drag and drop or add a document that is larger than 25MB, a yellow message displays. When uploading a document, the document cannot exceed 25MB.



## Steps

1. With Available Placeholders displayed in the SureClose grid, click the **Open** button.
2. Locate the file on your computer or network drive that you want to attach to the Placeholder (.pdf, .xls, .xlsx, .doc, .docx, .ppt or .pptx file types *only*).
3. Select the file with your cursor, drag and drop the file into the desired Placeholder, under *Available Placeholders*.



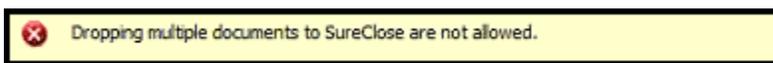
4. A yellow message displays at the top of the screen, confirming the file (with file name) has been successfully added to the Placeholder. In addition, an auto-refresh occurs, which also displays the document under the SureClose Documents tab, under *Available Documents*.

You can also drag and drop documents from your desktop into Available Placeholders under the SureClose grid. Simply click the file on your desktop, drag and drop it into the SureClose grid in AIM+.



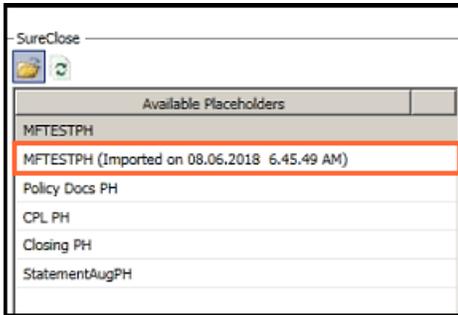
## Note

At this time, you can only drag and drop **one file** at a time into the SureClose grid. If you attempt to drag and drop more than one document, a yellow message displays, confirming the error.

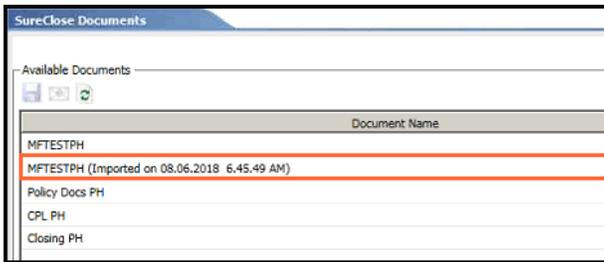


## Drag and Drop Documents into Placeholders with One or More Files

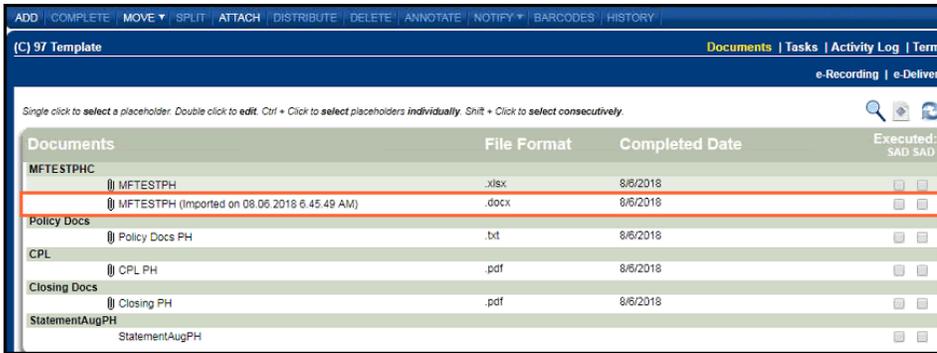
If you drag and drop a document into an Available Placeholder that already has one or more documents in it, a timestamp displays beside the document name of the most recently added document.



This timestamp will also display beside the file name, under *Available Documents*.



The file name and added timestamp also displays within SureClose Advantage.



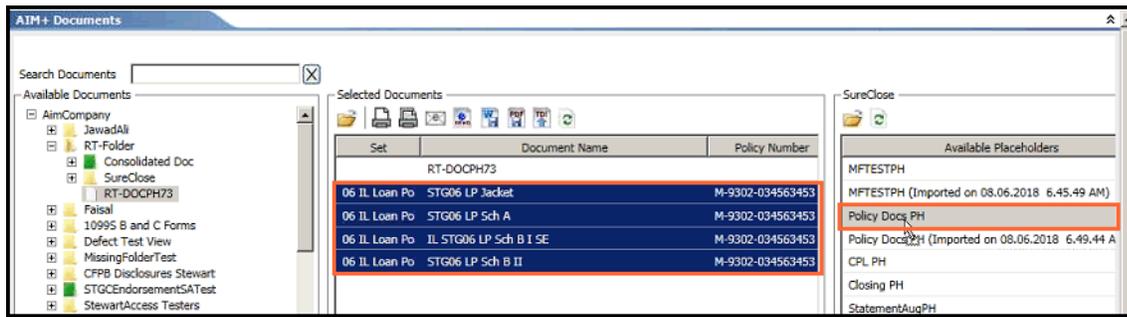
## Drag and Drop Documents from Consolidated Sets

While in this release of AIM+ 7.3, you can only drag and drop one document at a time into an Available Placeholder, consolidated sets (being bundled together) are an exception.

### Steps

1. On the Documents screen, from the *Available Documents* menu, select a document set. The consolidated set displays in the *Selected Documents* grid.
2. Click to select the set, drag and drop into the *Available Placeholder*, under the SureClose grid.
3. Locate the file on your computer or network drive that you want to attach to the Placeholder (.pdf, .xls, .xlsx, .doc, .docx, .ppt or .pptx file types *only*).

- Select the file with your cursor, drag and drop the file into the desired Placeholder, under *Available Placeholders*.



### Note

At this time, you cannot directly drag and drop documents from the Available Documents menu on the left side of the screen to placeholders in the SureClose grid. If you attempt to drag and drop documents from this area to a placeholder in the SureClose grid, a yellow message displays.



## Viewing SureClose Documents in AIM+

Once SureClose Placeholders are viewable in the SureClose grid, and SureClose documents have been uploaded to AIM+ or documents are uploaded from SureClose for the same file, you can view these documents in the **SureClose Documents** tab of the *Documents* screen.

### Steps

- From the *Documents* screen, expand the **SureClose Documents** tab. The list of Available Documents displays.
- From the *Available Documents* list, double-click a document to view it.



### Note

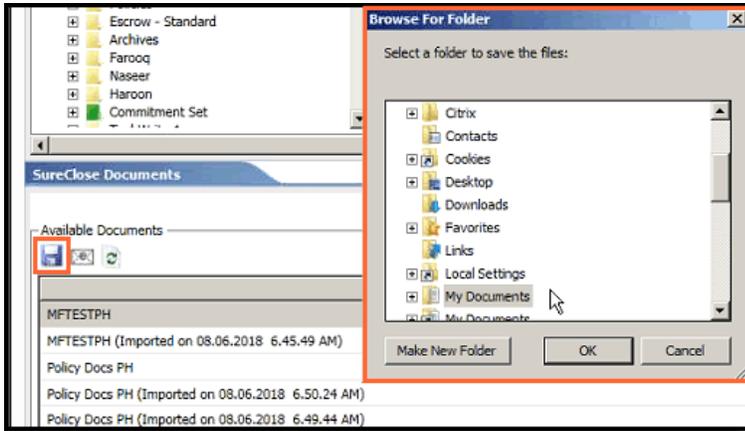
Documents can only be viewed from the Available Documents list of the SureClose Documents tab in AIM+. All the documents either uploaded from AIM+ or SureClose are visible here and these could be of any type. If you attempt to open a document in AIM+ and no default viewer application is configured, an error message displays on the AIM+ screen, stating that "Your document type (.xxx) is not supported and cannot be displayed. Please view a supported file type.". A Windows pop-up displays, asking you to select an alternative program to open the file type.

## Saving SureClose Documents from AIM+

You can save any document(s) listed under Available Documents in the SureClose Documents tab to your computer.

### Steps

1. From the *SureClose Documents* tab, under **Available Documents**, click on one or more documents you would like to save onto your computer. The *Save* button becomes enabled.
2. Click the **Save** button. The Browser for Folder pop-up displays.
3. From the Browser for Folder pop-up, locate the folder to save your documents.

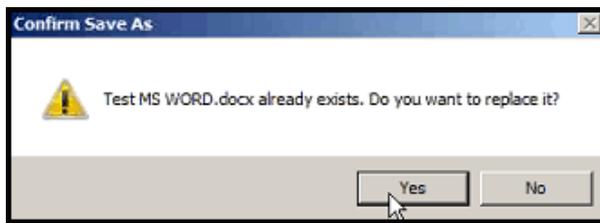


4. Click **OK** to save the document.



### Note

If you attempt to upload and save the same document name to the same location on your machine, a pop-up displays, asking if you want to replace the file.



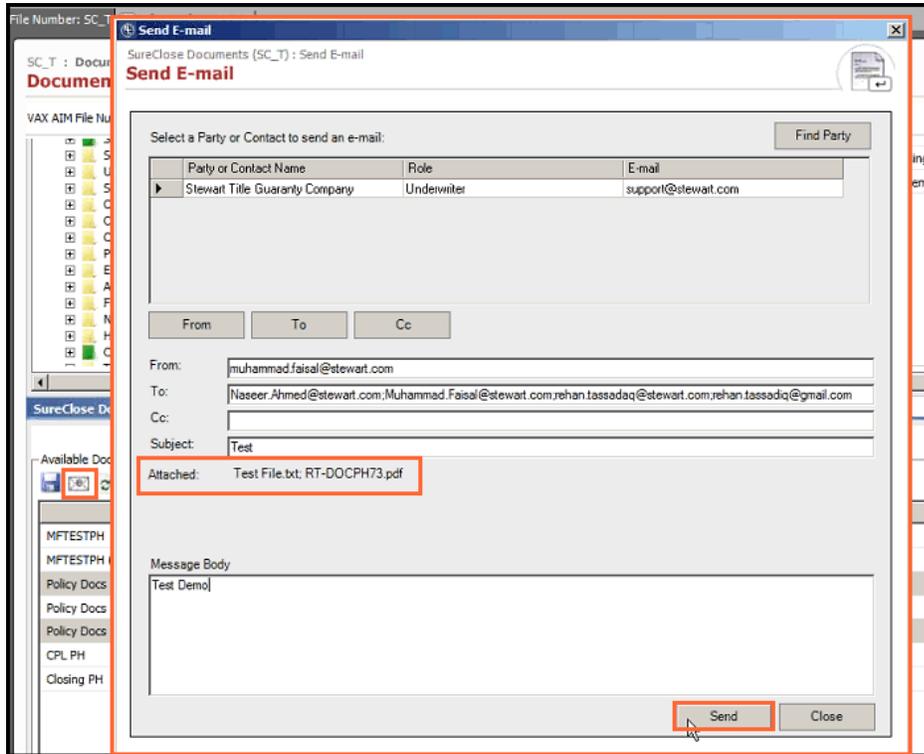
In addition, if you do not have permissions to save a document to a folder, the error message, **Access denied**, displays.

## Emailing SureClose Documents from AIM+

You can also attach one or more documents to a secure email, sent from AIM+.

### Steps

1. From the *SureClose Documents* tab, under **Available Documents**, click on one or more documents that you would like to email from AIM+. The *Email* button becomes enabled.
2. Click the **Email** button. The Send E-mail pop-up displays, with the selected document(s) attached, including the file format/file type.



3. Type in the remaining fields (To, Subject, and Message Body).
4. Click **Send**. A pop-up message displays, confirming the email was sent.



### Note

Multiple documents attached in a single email template are separated by a semi-colon.

The total file size of one or more document attachments cannot exceed **25MB**. If the document(s) you attached exceed the maximum size requirement, you will be unable to send the document(s) through the AIM+ secure email template.

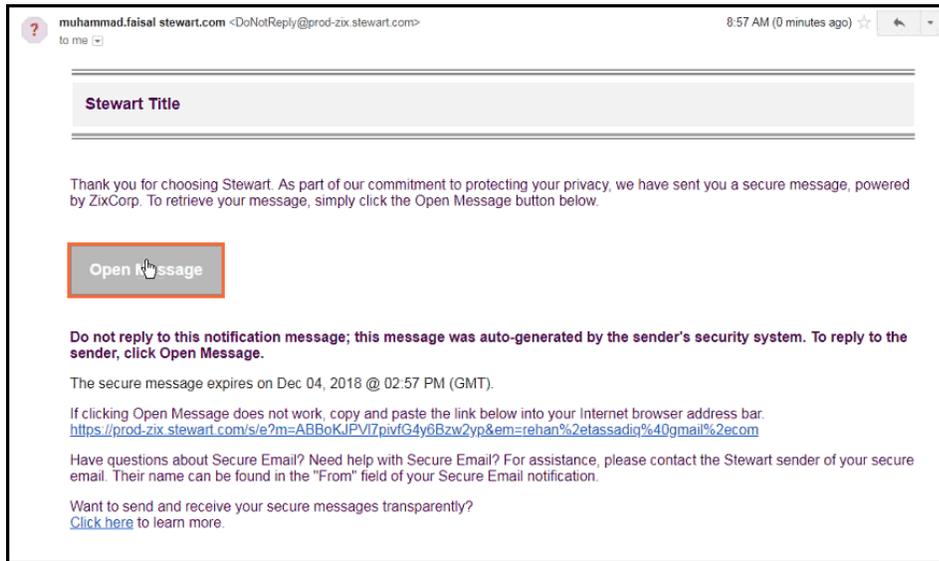
To increase the email attachment size, contact your Administrator. If your system is integrated with Outlook, the attachment size limit syncs with the allotted attachment size limit of your Outlook ASP system.

## Opening a Secure Email from AIM+

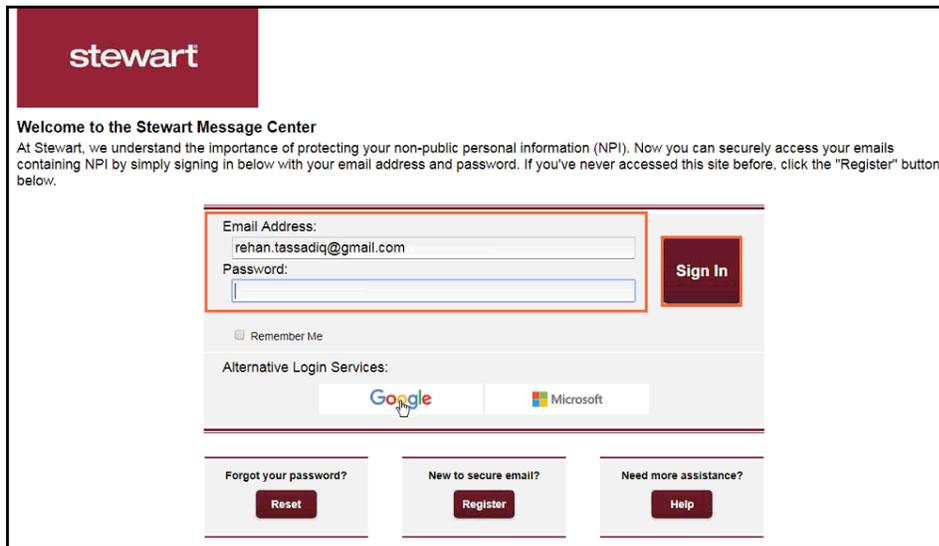
Emails sent to external email addresses (off the Stewart network) are secure. To open a secure email from an email inbox that is not on the Stewart network, follow the steps below:

### Steps

1. From your email inbox, click to open the email sent from AIM+.
2. From the email, click the **Open Message** button. The *Stewart Message Center* screen displays.

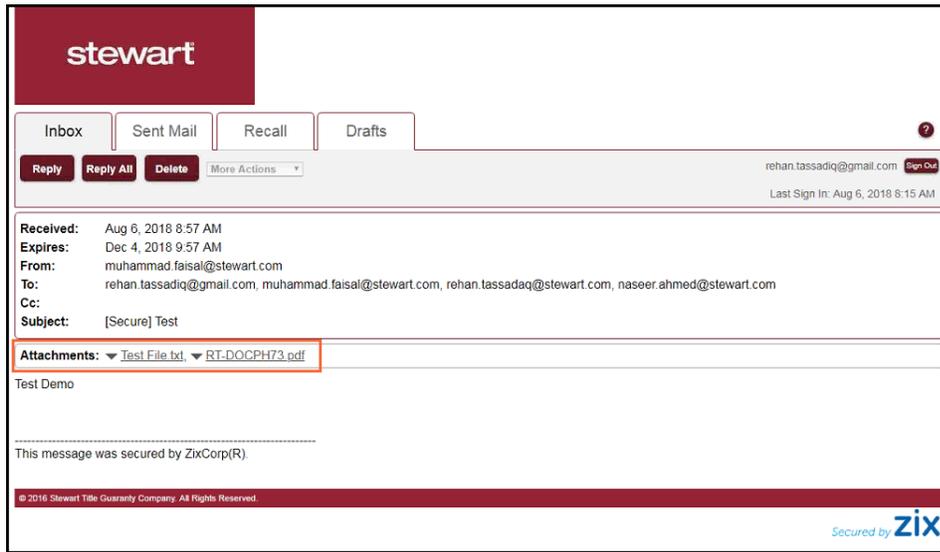


3. From the *Stewart Message Center* screen, enter in your network credentials.



4. Click the **Sign In** button. The *Stewart Inbox* displays.

5. From the *Stewart Inbox*, you can now access the secure email message content, including the SureClose documents attached.



# Defects

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The following defects were addressed in **AIM+ 7.3**:

## **Stewart Access**

- (TFS147176) Stewart Access serial numbers that begin with 0 (zero) no longer create while adjusting Endorsements, PPE and OPPE.

## **AIM+ Core**

- (TFS145116) No more UER when user hit F5 when editing signature line in Closing Statement.

# Additional Information

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## Accessing AIM+

You can access AIM+ one of two ways depending on your setup:

- *If you access AIM+ through the Citrix environment*, AIM+ is automatically updated to the latest version when you log in. If you are new to StewartWorkPlace or TitleWorkPlace, contact Customer Care at 1.855.330.2800 for assistance.
- *If you are using AIM+ in a Citrix environment*, maximize the Citrix screen and the AIM+ screen for best viewing results.

## Training

Through the AIM+ Help Contents, you can access an online library of interactive tutorials and quick reference cards by clicking the **Additional Learning Resources** link or navigate to the [AIM+ Training Center](#) page.

## Technical Support

For technical support, contact Stewart Customer Care Center at 1.877.800.3132 or [CustomerCare@stewart.com](mailto:CustomerCare@stewart.com).