



SureClose[®] Product Line 4.5

Release Notes

March 18, 2016

stewart[®]

Real partners. Real possibilities.[™]

Table of Contents

Overview	3
Post-Installation Considerations	3
Features and Functionality	5
New in This Release.....	5
Stewart Online/my.sureclose.com Password Expiry Alert	6
Stewart Online: Document View Activity History Log	8
Unlock Account: Verification Email Process.....	9
Unlock Account: User Message Updates for Login.....	12
Document Filed Notification by Role Accepts HTML Formatting	14
Stewart Online Guest Document Upload	15
Zix Secure Email Tab Removal from Stewart Online	16
Zix Secure Email Tab Removal from SureClose Advantage	18
Secure Email Portal Updates	20
Color Update On Login Screens	22
Additional Information.....	23
Training.....	23
Technical Support.....	23

Overview

SureClose Advantage 4.5 includes enhanced login access security, product enhancements, and defect corrections. This document provides a brief explanation of what has been updated, as well as an introduction to new features implemented within this release.

For more information about any of the new features, refer to SureClose Advantage Online Help and search for the specific topic.

Deployment Date: March 18, 2016

Post-Installation Considerations

After the new version has been deployed and prior to logging in, it is recommended that you complete the following post-installation tasks:

Delete Temporary Internet Files

Delete Cookies

Deleting Temporary Internet Files

(MS Article ID: 260897)

The **Temporary Internet Files** (or cache) folder contains web page content that is stored on your hard disk for quick viewing. This cache permits Internet or MSN[®] Explorer to download only the content that has changed since you last viewed a web page instead of downloading all the content for the page every time it is displayed.

Administrators can customize **Temporary Internet File** settings to prevent modifications. Contact your System Administrator if you cannot access the **Internet Options** dialog box or the **General** tab.

Steps

1. Close **Internet Explorer[®]** and any instances of **Windows[®] Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Files**. The Delete Files dialog box displays.
4. If available, select the **Delete All Offline Content** check box and then click **OK**. A confirmation message displays asking if you are sure you want to complete the delete process.
5. To confirm, click **OK**.



Note

Be patient when performing this task. If the *Temporary Internet Files* folder contains a significant amount of web page content, then this process may take several minutes to complete.

Deleting Cookie Files

(MS Article ID: 278835)

Files starting with the word *Cookie* may remain in the Temporary Internet Files folder even after opting to delete them. You can delete these files; however, it is recommended that you make a backup copy of cookies prior to deleting them because these files may contain information for a customized web page or login information for a website that you do not want to lose. If needed, contact your System Administrator for assistance or refer to *MS Article ID: 221523*.

Steps

1. Close **Internet Explorer** and any instances of **Windows Explorer**.
2. From the **Start** menu, point to **Control Panel** and then select **Internet Options**. The Internet Options dialog box displays.
3. On the **General** tab, locate **Temporary Internet Files** and then click **Delete Cookies**. The Delete Cookies dialog box displays. A confirmation message displays asking if you are sure you want to complete the delete process.
4. To confirm, click **OK**.

Features and Functionality

This section introduces new features and functionality added to SureClose Advantage 4.5.

New in This Release

Stewart Online & SureClose Advantage 4.5

The Stewart Online and SureClose application **Password Reset** process has been updated to restrict users with expired account passwords from logging into both platforms. Refer to [Stewart Online/my.sureclose.com Password Expiry Alert](#) for more information.

The **Document History Log** has been made consistent on both SureClose Advantage and Stewart Online to maintain the document view activity details. Refer to [Stewart Online: Document View Activity History Log](#) for more information.

The SureClose Advantage and Stewart Online **User login access** and **Access activity logging** has been enhanced by clear and accurate user messages for users who get their accounts locked due to repeated invalid attempts. Refer to [User Message Updates for Login](#) for more information.

In SureClose application guest user accounts permissions for documents upload and management have been removed to avoid potential mistakes by such users. Refer to [Stewart Online Guest Document Upload](#) for more information.

The Secure Message tab on both SureClose Advantage and Stewart Online platforms has been modified for better user experience. Refer to [Zix Secure Email Tab Removal from Stewart Online](#) for more information.

Stewart Online users' Secure Email utility has been enhanced now and current secure email system is being ported to ZixCorp portal. Refer to [Secure Email Portal Updates](#) for more information.

Stewart Online/my.sureclose.com Password Expiry Alert

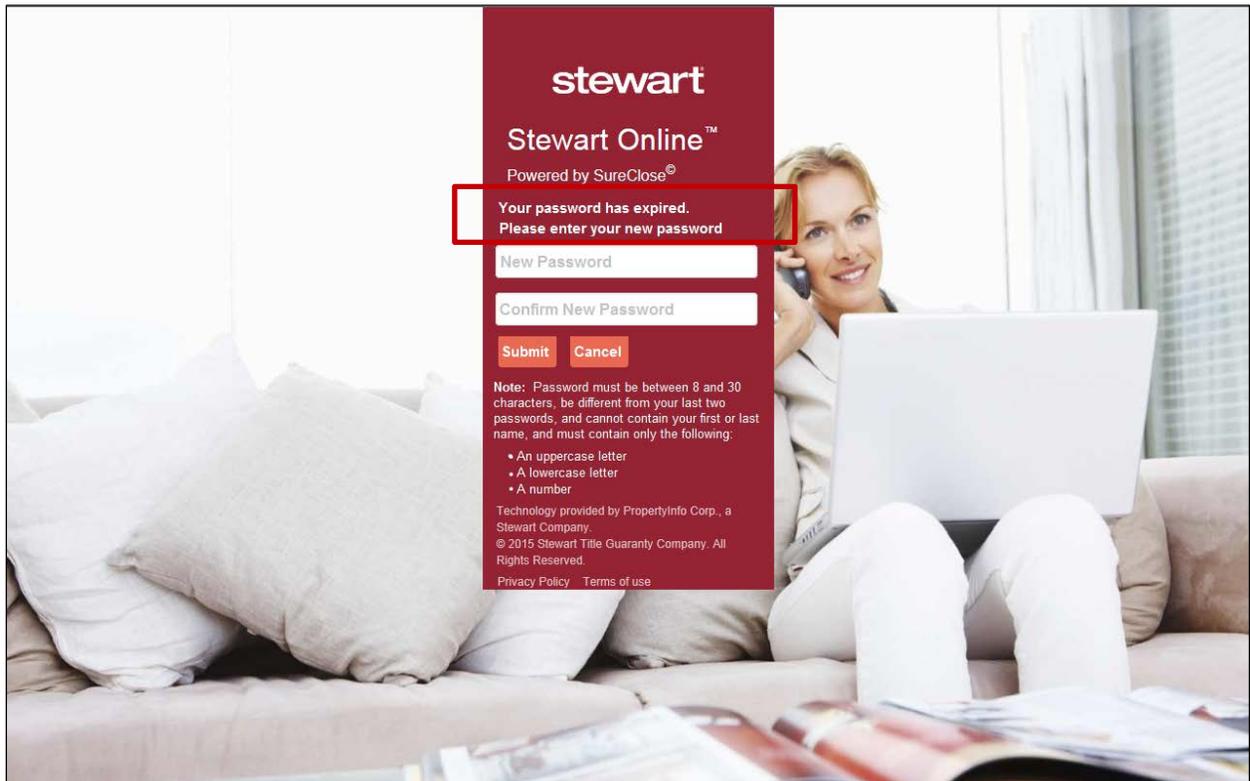
The Stewart Online and SureClose application both will redirect the users to **Password Reset** page if the user attempts to login to an account with an expired password. This was not consistent with Stewart Online previously as it used to successfully login users with expired passwords, and take users to the **My SetUp** page for resetting the user password.

Now from both platforms, all users with expired password for their respective accounts will be redirected to the Password Reset page with an alert message informing about their account password expiry.

The new passwords must be set with following guidelines:

- Password must be between 8 and 30 characters
- Password must be different from the last two passwords
- Password cannot contain user's first or last name
- Password must contain at least one uppercase, one lower case letter and one number
- Password cannot contain any special character

Stewart Online now redirects users to **Password Reset** page, and also displays the user message about password expiry.



The SureClose application Password Reset page also displays the user message about password expiry.

The screenshot shows the SureClose application interface. At the top right, the SureClose logo and navigation links "Contact Us | Logout" are visible. A yellow navigation bar contains "Welcome | Listings Search | About". The main content area is titled "Welcome!" and includes a "Please login to view Documents" section. A map of the United States is displayed in the center. On the right side, a red-bordered box highlights a message: "Your password has expired. Please enter your new password". Below this message is a form with two input fields: "New Password" and "Confirm New Password", and two buttons: "Submit" and "Cancel". A "Note" section specifies password requirements: "Password must be between 8 and 30 characters, be different from your last two passwords, cannot contain your first or last name, and must contain only the following:" followed by a list: "• An uppercase letter", "• A lowercase letter", and "• A number". Below the note are logos for Adobe Reader, Java, and Microsoft Internet Explorer. At the bottom, a footer contains the text: "Technology provided by PropertyInfo Corp., a Stewart Company. © 2012 Stewart Title Guaranty Company. All rights reserved. Privacy Policy | Terms of Use | 15.09.15.1111".

Stewart Online: Document View Activity History Log

The **Document History Log** has been made consistent on both **SureClose Advantage** and **Stewart Online** to maintain the document view activity details.

Prior to this update, this log was maintained in SureClose Advantage only, which could be viewed on the **Documents** page of a file. Users simply click a document, select a placeholder, and click the **History** button to display the activity history log.

In **SureClose Advantage 4.5**, both platforms (SureClose Advantage and Stewart Online) maintain the date on which the document was viewed, as well as the SureClose User ID of the user who accessed the document and performed what actions. The history log detail also displays the SureClose Placeholder Name to which the document is attached, along with the document format type.

The screenshot displays the Stewart Online interface for viewing document activity history. The top navigation bar includes 'Current File: Test File - Nshah, 1980 Post Oak Blvd, ... (C)' and 'Current User: Mr. Naeem Shah'. A sidebar on the left lists 'Recent Files' and navigation options like 'HOME', 'FILES', 'MESSAGES', 'CONTACTS', 'CALENDAR', and 'ADMIN'. The main content area features search filters for 'From Date' (02/29/2016), 'To Date' (03/01/2016), and 'Operation' (Viewed). Below the filters is a table of activity logs with columns for Date, User, Activities, and Information. A red box highlights the following entry:

Date	User	Activities	Information
03/01/2016 04:53:48 AM	shah2, 13086	Document Viewed	test doc mar1 16 Kkala.jpg.jpg viewed by StewartOnline user:13086 shah2
03/01/2016 05:21:23 AM	shah2, 13086	Document Viewed	doc.placeholder3 Lighthouse.pdf.pdf viewed by StewartOnline user:13086 shah2



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topics available under the section labeled, [Viewing File History](#).

Unlock Account: Verification Email Process

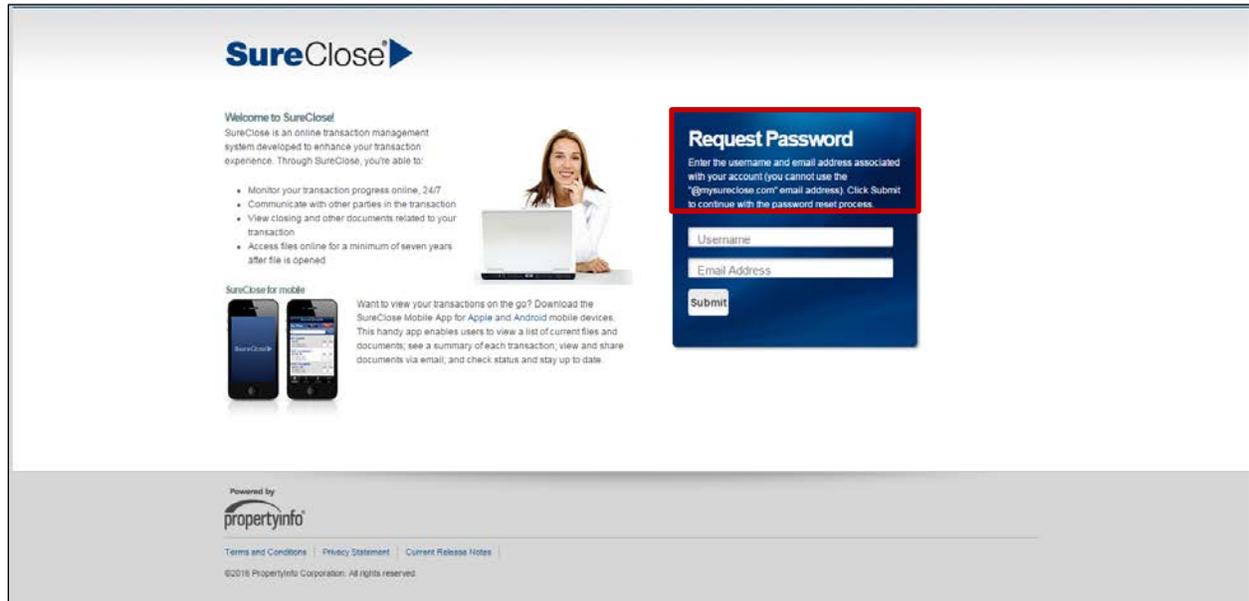
SureClose users can now initiate a self-unlock process for their Login accounts in the case that passwords have expired, or more than 3 login attempts fail.

This process has been updated to make it consistent across the Stewart applications platform. The instructions for each step during this process have been revised to help users get through self-unlock process effortlessly, in three simple steps:

1. Request Submission
2. Acknowledgment Email
3. Password Reset

To keep the process secure, each self-unlock request is limited to a **60 minute validity** time window. If the user re-submits a self-unlock request during this time frame, the same validation token is resent through a new email. The users are redirected to the **Request Password** page to re-initiate the request if the validity window expired. The page highlights the alert for an expired session in red and the users can restart by a new password reset request.

The steps below walk you through the updated Self-Unlock process:



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topics available under the section labeled, [Accessing And Log In](#).

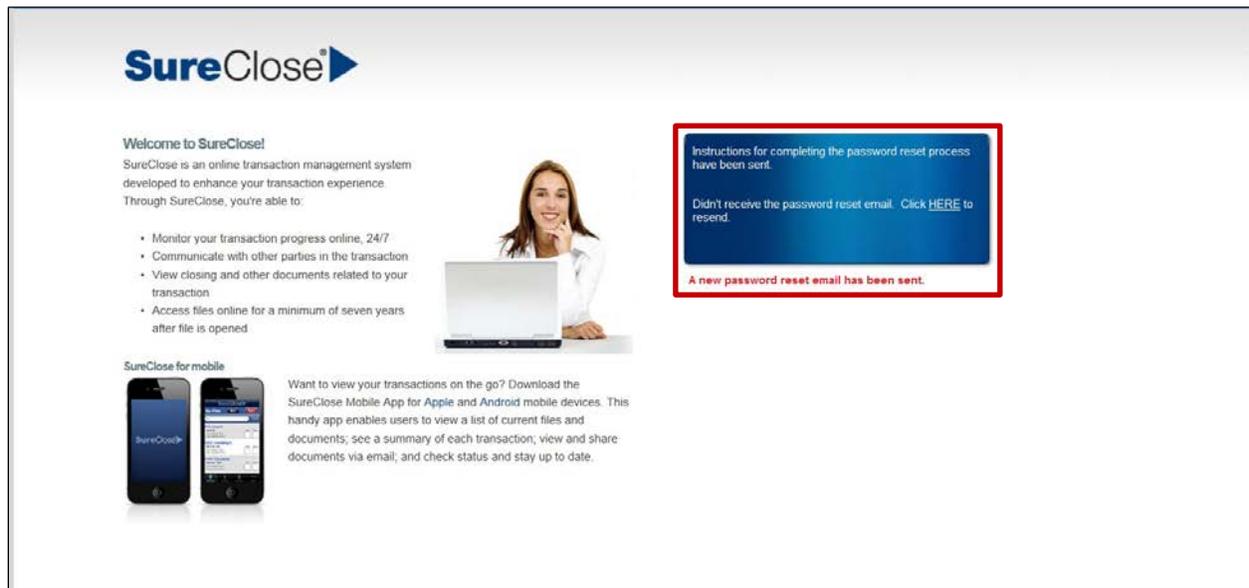
Steps

1. From the **SureClose Login** page, click the **Request Password** link.
2. Enter your Username and Email Address associated to SureClose account.
3. Click **Submit** button.

4. When your account is locked due to three invalid login attempts, the following message is displays: *"Instructions for completing the password reset process have been sent. Didn't receive the password reset email. Click [HERE](#) to resend."*

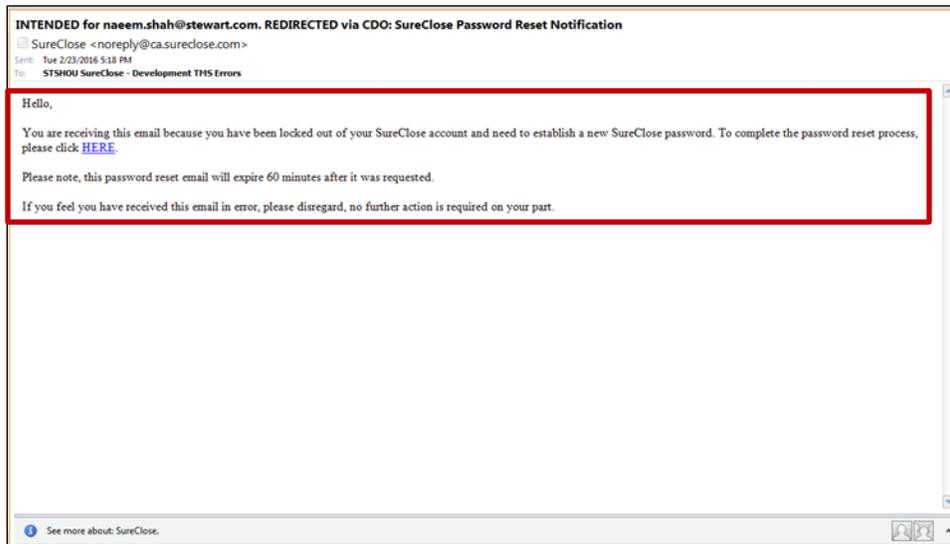


5. Click the **HERE** link to display the following alert: *"A new password reset email has been sent."*



6. When your account is locked due to login attempts with invalid/expired passwords then the current page prompts you to check your email for a link to reset your password.

- From your Password Reset Notification email, click the **HERE** link. You will be redirected to the Request Password page to reset your password.



- Enter your new password phrase.
- Click **Submit**.

The image shows a screenshot of the SureClose website. On the left, there is a "Welcome to SureClose!" section with a list of features: "Monitor your transaction progress online, 24/7", "Communicate with other parties in the transaction", "View closing and other documents related to your transaction", and "Access files online for a minimum of seven years after file is opened". Below this is a "SureClose for mobile" section with images of mobile devices and text: "Want to view your transactions on the go? Download the SureClose Mobile App for Apple and Android mobile devices. This handy app enables users to view a list of current files and documents; see a summary of each transaction; view and share documents via email; and check status and stay up to date." In the center, there is a photo of a woman sitting at a desk with a laptop. On the right, there is a blue "Request Password" form with input fields for "Username" and "Email Address", and a "Submit" button. A red box at the bottom of the form contains the text: "Your session is expired. Please try again."



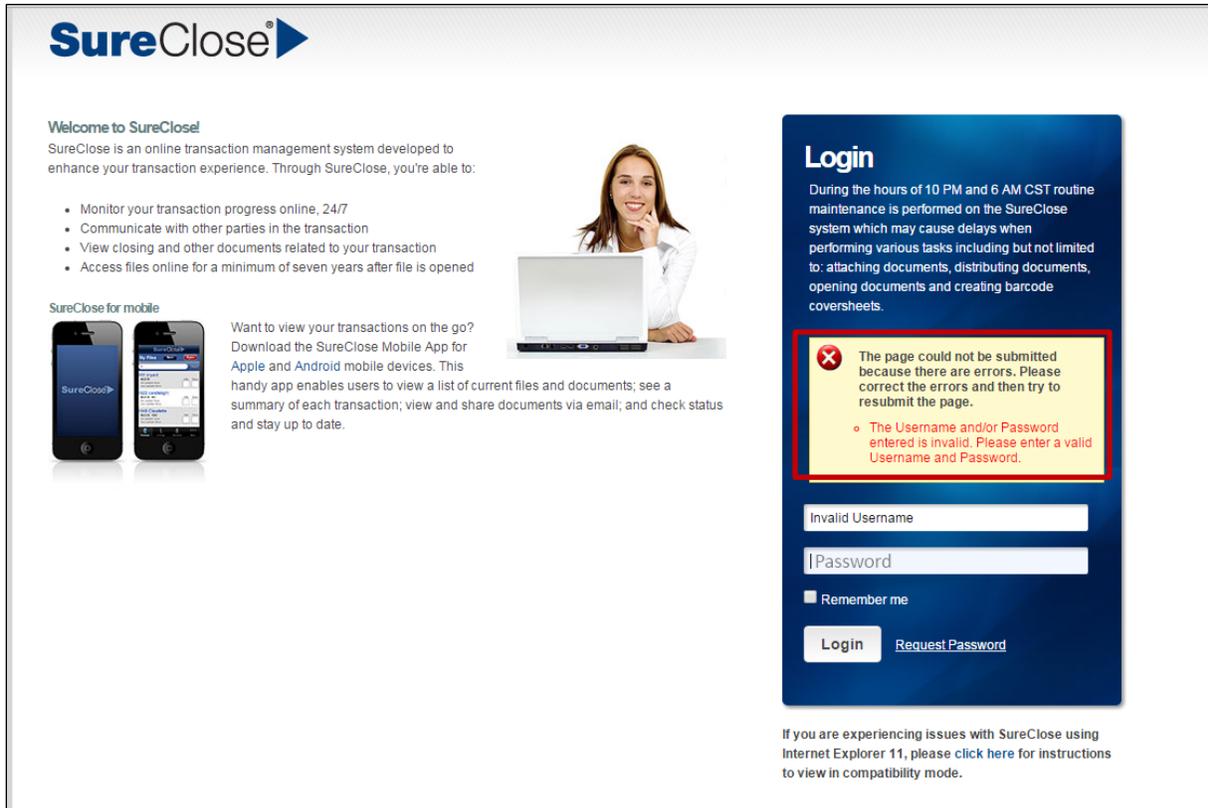
The password reset email link remains valid for only 60 minutes. If the time is passed then the user is redirected to Request Password page with a highlighted session expiry alert on page.

Unlock Account: User Message Updates for Login

To enhance the SureClose user login experience, alerts and user messages have been rephrased to make users more informed as they are logging into their accounts.

Now the SureClose login page alerts users each time they try to login with invalid credentials with a clear count of reattempts left before locking their accounts.

Previously the user message simply informed about invalid user credentials:



The screenshot displays the SureClose website interface. On the left, there is a 'Welcome to SureClose!' section with a list of features and a 'SureClose for mobile' section with images of mobile devices. In the center, a woman is shown sitting at a desk with a laptop. On the right, the 'Login' section is highlighted, featuring a blue background and a white error message box with a red border. The error message states: 'The page could not be submitted because there are errors. Please correct the errors and then try to resubmit the page.' Below this, it lists the error: 'The Username and/or Password entered is invalid. Please enter a valid Username and Password.' The login form includes fields for 'Invalid Username' and 'Password', a 'Remember me' checkbox, and 'Login' and 'Request Password' buttons. At the bottom of the login section, there is a note about Internet Explorer 11 compatibility.

SureClose

Welcome to SureClose!
SureClose is an online transaction management system developed to enhance your transaction experience. Through SureClose, you're able to:

- Monitor your transaction progress online, 24/7
- Communicate with other parties in the transaction
- View closing and other documents related to your transaction
- Access files online for a minimum of seven years after file is opened

SureClose for mobile
Want to view your transactions on the go? Download the SureClose Mobile App for Apple and Android mobile devices. This handy app enables users to view a list of current files and documents; see a summary of each transaction; view and share documents via email; and check status and stay up to date.

Login
During the hours of 10 PM and 6 AM CST routine maintenance is performed on the SureClose system which may cause delays when performing various tasks including but not limited to: attaching documents, distributing documents, opening documents and creating barcode coversheets.

✘ The page could not be submitted because there are errors. Please correct the errors and then try to resubmit the page.

- The Username and/or Password entered is invalid. Please enter a valid Username and Password.

Invalid Username

Password

Remember me

Login [Request Password](#)

If you are experiencing issues with SureClose using Internet Explorer 11, please [click here](#) for instructions to view in compatibility mode.

Now the user message informs after first invalid login attempt, like this:

SureClose

Welcome to SureClose!
SureClose is an online transaction management system developed to enhance your transaction experience. Through SureClose, you're able to:

- Monitor your transaction progress online, 24/7
- Communicate with other parties in the transaction
- View closing and other documents related to your transaction
- Access files online for a minimum of seven years after file is opened

SureClose for mobile
Want to view your transactions on the go? Download the SureClose Mobile App for Apple and Android mobile devices. This handy app enables users to view a list of current files and documents; see a summary of each transaction; view and share documents via email; and check status and stay up to date.

Login
During the hours of 10 PM and 6 AM CST routine maintenance is performed on the SureClose system which may cause delays when performing various tasks including but not limited to: attaching documents, distributing documents, opening documents and creating barcode coversheets.

Error Message:
✘ The page could not be submitted because there are errors. Please correct the errors and then try to resubmit the page.
• The Username and/or Password entered is invalid. You have 2 more attempts to log in before the account is locked.

Username: kroy2016
Password: [Redacted]
 Remember me
 [Request Password](#)

If you are experiencing issues with SureClose using Internet Explorer 11, please [click here](#) for instructions

The second invalid login attempt message is updated as shown below:

SureClose

Welcome to SureClose!
SureClose is an online transaction management system developed to enhance your transaction experience. Through SureClose, you're able to:

- Monitor your transaction progress online, 24/7
- Communicate with other parties in the transaction
- View closing and other documents related to your transaction
- Access files online for a minimum of seven years after file is opened

SureClose for mobile
Want to view your transactions on the go? Download the SureClose Mobile App for Apple and Android mobile devices. This handy app enables users to view a list of current files and documents; see a summary of each transaction; view and share documents via email; and check status and stay up to date.

Login
During the hours of 10 PM and 6 AM CST routine maintenance is performed on the SureClose system which may cause delays when performing various tasks including but not limited to: attaching documents, distributing documents, opening documents and creating barcode coversheets.

Error Message:
✘ The page could not be submitted because there are errors. Please correct the errors and then try to resubmit the page.
• The Username and/or Password entered is invalid. You have 1 more attempt to log in before the account is locked.

Username: kroy2016
Password: [Redacted]
 Remember me
 [Request Password](#)

If you are experiencing issues with SureClose using Internet Explorer 11, please [click here](#) for instructions

After the third invalid login attempt the user message is updated as shown below:



Note

The verbiage in the login disable email has also been updated indicating 3 consecutive invalid login attempts made by the user.

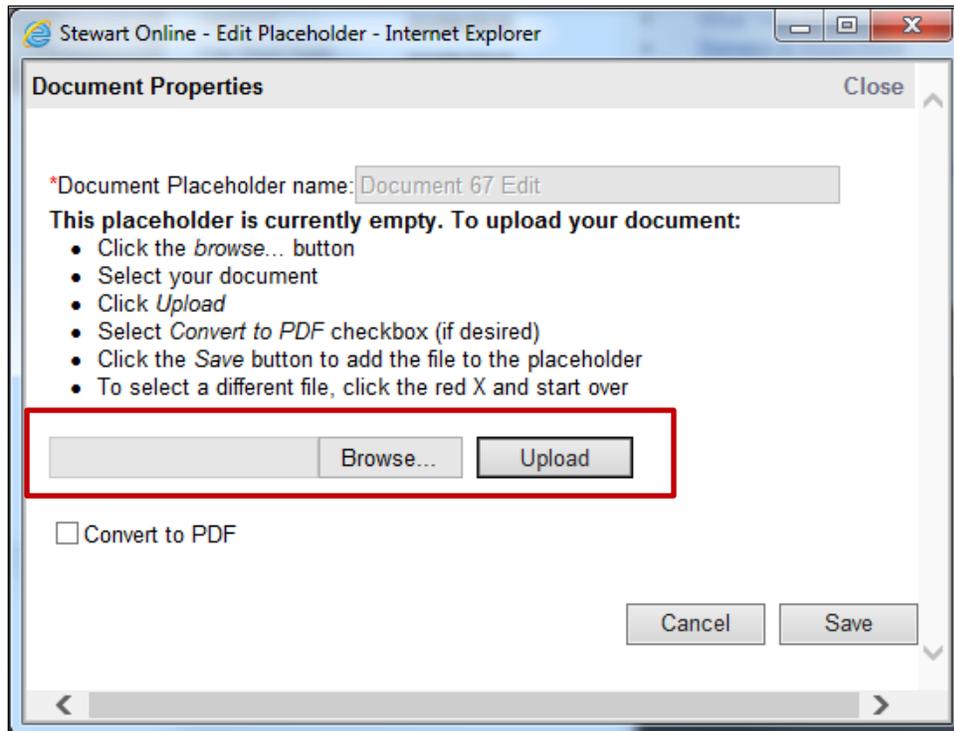
Document Filed Notification by Role Accepts HTML Formatting

The **Document Notification by Role** will now accept HTML formatting. Previously, an error message was received upon saving if HTML tags were present in the Notification.

Stewart Online Guest Document Upload

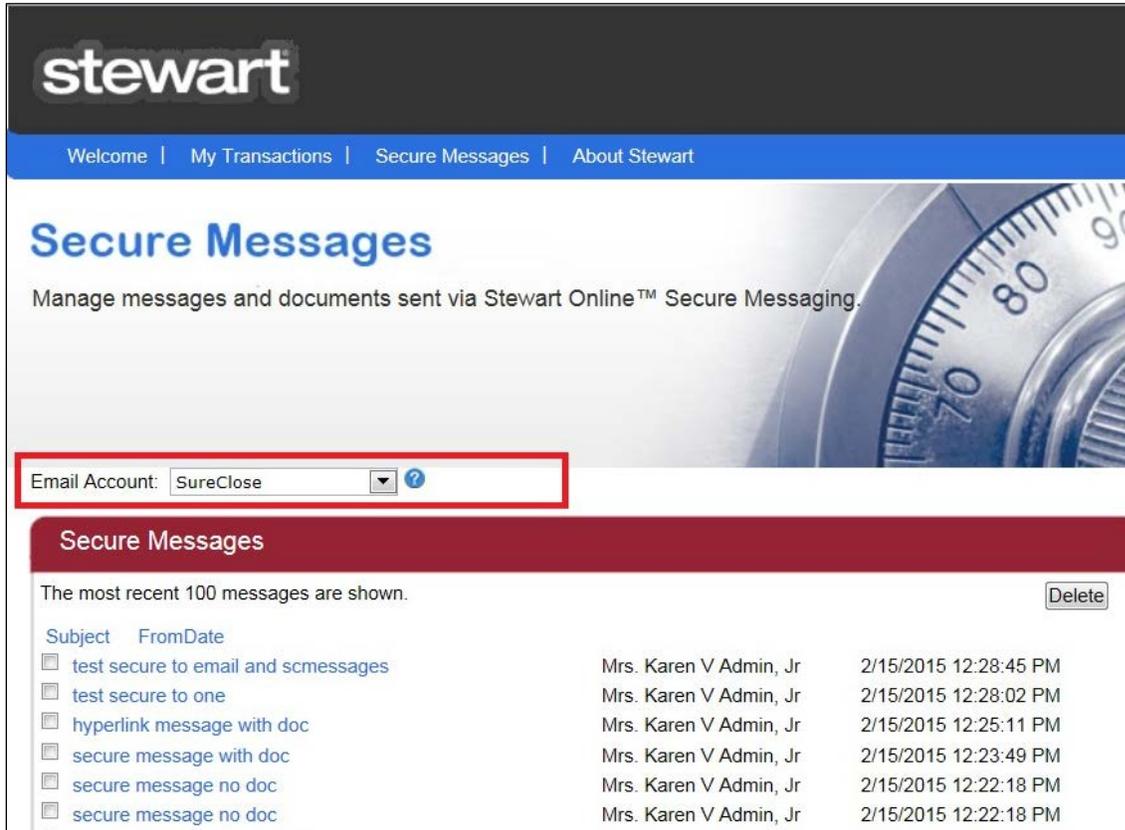
The **Guest User** with document upload permissions no longer has the ability to set placeholder permissions via *Stewart Online*.

Also, if a Guest User has **Full Control** access on a document placeholder, the user will be able to upload documents to placeholders (which was previously limited to View Only).



Zix Secure Email Tab Removal from Stewart Online

In both SureClose Advantage, and Stewart Online, the **Email Account** drop-down has been removed. This eliminates the ability to view **Zix Secure** email from SureClose Advantage and Stewart Online. Zix Secure email can only be viewed by logging in directly to the Zix Corp portal.



The screenshot shows the Stewart Online interface for Secure Messages. At the top, the Stewart logo is displayed. Below it is a navigation bar with links: Welcome | My Transactions | Secure Messages | About Stewart. The main heading is "Secure Messages" with the subtext "Manage messages and documents sent via Stewart Online™ Secure Messaging." Below this, there is a red-bordered box containing the "Email Account" dropdown menu, which is currently set to "SureClose". Below the dropdown is a "Secure Messages" section with a red header. It states "The most recent 100 messages are shown." and includes a "Delete" button. A table of messages follows, with columns for Subject, FromDate, and a date/time column.

Subject	FromDate	
<input type="checkbox"/> test secure to email and scmessages	Mrs. Karen V Admin, Jr	2/15/2015 12:28:45 PM
<input type="checkbox"/> test secure to one	Mrs. Karen V Admin, Jr	2/15/2015 12:28:02 PM
<input type="checkbox"/> hyperlink message with doc	Mrs. Karen V Admin, Jr	2/15/2015 12:25:11 PM
<input type="checkbox"/> secure message with doc	Mrs. Karen V Admin, Jr	2/15/2015 12:23:49 PM
<input type="checkbox"/> secure message no doc	Mrs. Karen V Admin, Jr	2/15/2015 12:22:18 PM
<input type="checkbox"/> secure message no doc	Mrs. Karen V Admin, Jr	2/15/2015 12:22:18 PM

With the elimination of Zix Secure Email from both SureClose Advantage and Stewart Online, the **Verified for Secure Messages** section has been eliminated as well.

My Setup

Prefix **Mr. & Mrs.** * First Name Email

Company Another linked company

Address

City houston

Bus Phone (713) 777-7777

Bus Fax (713) 456-2336

Email kchiodo@stewart.com

* *required*

* Last Name Contact

Line 2

US Zip State

Home Phone (719) 388-8888

Home Fax (713) 222-2222

Online: Login ID emailcontact

Password ●●●●●●●●

Confirm Password ●●●●●●●●

You can change your password at any time by adhering to the following guidelines:

- Minimum 8 characters, maximum 30 characters
- May only contain uppercase letters, lowercase letters and numbers and must contain at least one of each
- Cannot contain your First or Last name
- Cannot contain your Login ID
- Cannot contain the words 'admin', 'password' or 'null'
- Cannot contain spaces or special characters such as ~!@#\$\$%^&*()_-=+[]{}"/?><|\
- Must be different from last 2 passwords

Verified for Secure Messages *(Note: Unchecking will prevent access to the secure messages of that email account)*

kchiodo@stewart.com

Integrations:

Product Order Services

Login ID

Password

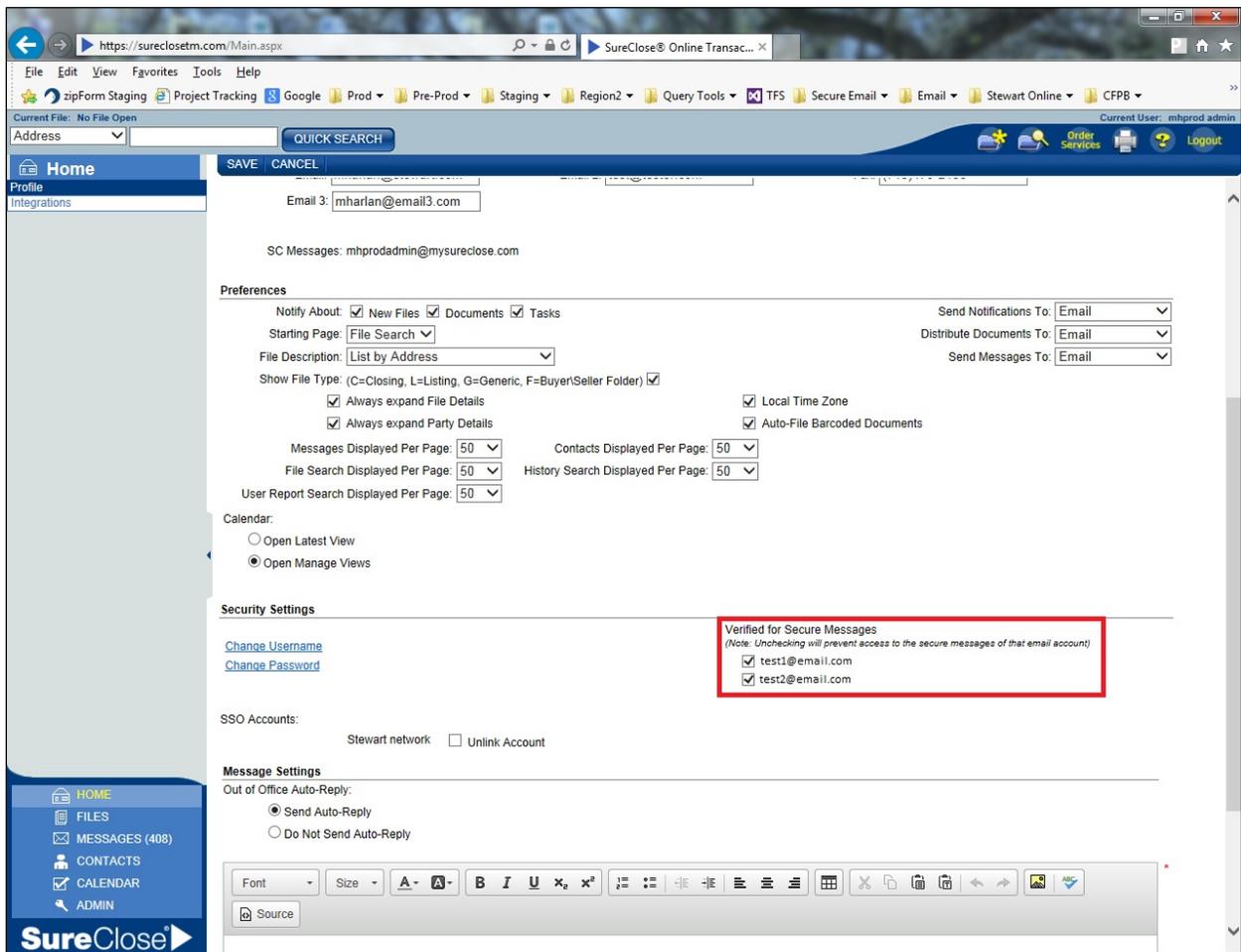
Confirm Password

Notification Preference: Check box to enable notification(s) relevant to you on all existing and future transactions

New File Access

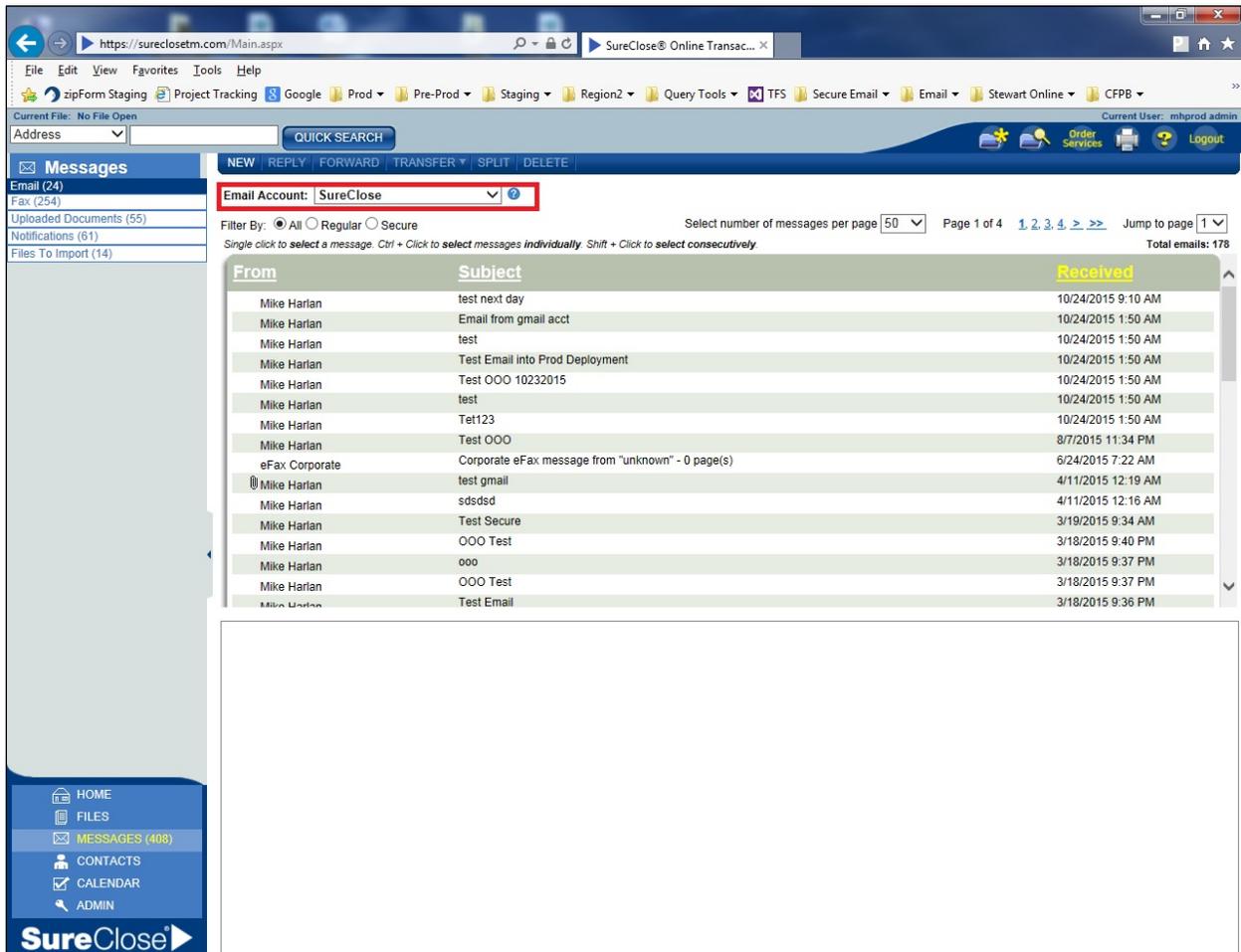
Zix Secure Email Tab Removal from SureClose Advantage

The **Verified for Secure Messages** section has been removed from the *Profile* page.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topics available under the section labeled, [Profile Security Settings](#).

The **Email Account** drop-down has also been removed from the *Profile* page. Zix Secure Email is no longer available in SureClose Advantage.



Secure Email Portal Updates

Additional enhancements have been made to the **Secure Email** experience. The current Stewart Secure Email page redirects users to the **ZixCorp Secure Email** portal.

A new page redirects users to a ZixCorp Secure Email site within **20 seconds**. The user has the option to click the [here](#) link to redirect immediately, and not wait the full 20 seconds.



This new application will also run smoothly on mobile and smart devices, keeping SureClose users in control of their respective accounts at all times.

stewart

Welcome to the Stewart Message Center

At Stewart, we understand the importance of protecting your non-public personal information (NPI). Now you can securely access your emails containing NPI by simply signing in below with your email address and password. If you've never accessed this site before, click the "Register" button below.

Email Address:

Password:

Remember Me

Sign In

Forgot your password?
Reset

New to secure email?
Register

Need more assistance?
Help

Want to receive your secure messages directly in your inbox? [Learn more.](#)

Have questions about Secure Email? Need help with Secure Email? For assistance, please contact the Stewart sender of your secure email. Their name can be found in the "From" field of your Secure Email notification.

© 2016 Stewart Title Guaranty Company. All Rights Reserved.

Secured by **zixCORP**

www.stewart.com

Color Update On Login Screens

Previously, text blended with the SureClose page background color, causing users difficulty when reading content.

The readable content color contrasts have been adjusted on all pages of SureClose for optimal readability.



Additional Information

Training

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

Technical Support

For technical support, contact PropertyInfo Customer Care at 1.877.800.3132 or customercare@propertyinfo.com.