

SureClose[®] Product Line

Release Notes 4.4

October 23, 2015

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Overview

SureClose Advantage 4.4 includes audit reporting and product enhancements. 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: October 23, 2015

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

SureClose Advantage 4.4 includes additional functionality and enhancements in compliance with new **CFPB** regulations, effective **October 3, 2015**. This document provides users with a brief explanation of what was fixed and an introduction to new features and functionality implemented with this release.

New in This Release

SureClose Advantage 4.4:

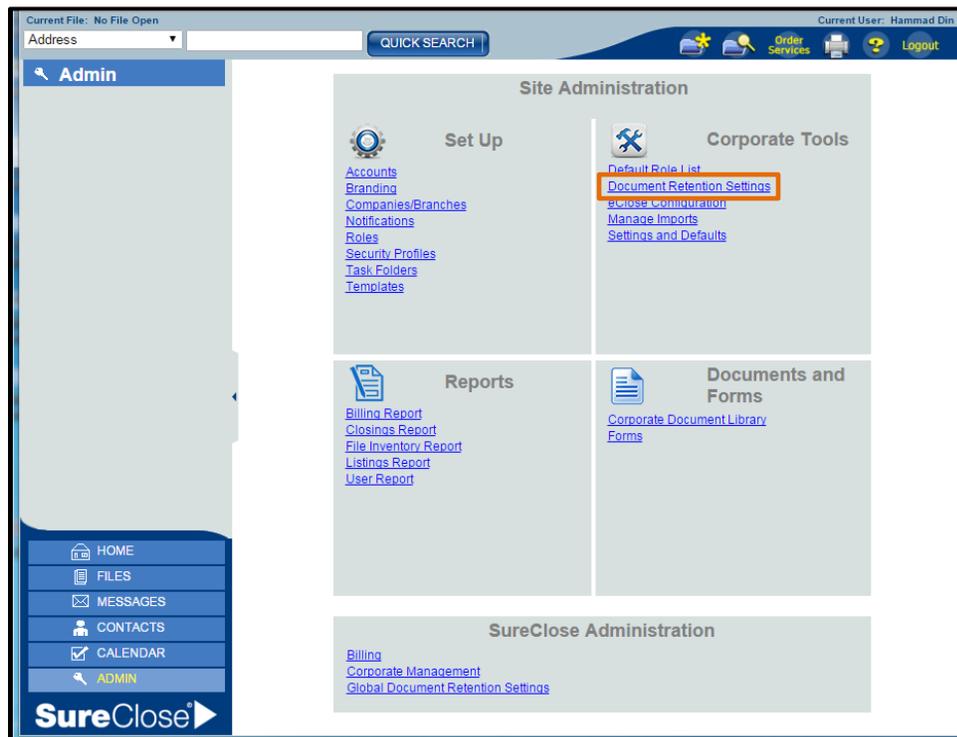
- A new page has been added to the **Admin** screen for corporations owned by independent agents to define and manage their documents retention durations. For more information refer to [Managing Corporate Document Retention Values](#).
- A new option has been added to the *Compliance and Document Retention* section on the **Corporate Settings and Defaults** page to allow corporations owned by independent agents to use their own custom document retention values. For more information, refer to [Document Retention Options](#).
- A new **Document Retention Report** has been added which is generated automatically and contains a list of all audit documents for a given corporation that have met or exceeded their retention dates. For more information, refer to [Document Retention Reports](#).
- A new **Document Retention Escalation Report** has been added which is generated automatically and contains a list of all audit documents for a given corporation that have exceeded their retention dates by at least 31 days. For more information, refer to [Escalation Report for Document Retention](#).
- A new report page has been included which displays the **Document Retention Report** results within SureClose. For more information, refer to [Viewing Document Retention Reports](#).
- Use the **Document Retention Report** pages to easily review audit documents that have met their retention dates to determine which ones may need to be deleted. For more information, refer to [Deleting Document Retention Reports](#).
- An enhancement has been added when printing out a list of document placeholders on a file. For more information, refer to [Print Complete List of Document Placeholders](#).

Admin

The following enhancements have been made to the Admin page.

Managing Corporate Document Retention Values

With high-level security permissions, you can manage and edit the retention period applied to documents for your corporation. Click the *Document Retention Settings* link to display the **Document Retention Periods by State** page. This page is only available for users in corporations owned by independent agencies. Use this page to edit the number of years that the document is to live within SureClose Advantage.



Document Retention Periods by State

After selecting the *Document Retention Settings* link, the **Document Retention Periods by State** page displays for your corporation, including a list of states and retention values. Only one value per state on the *Document Retention Periods by State* page displays, and only applies to the logged in user's corporation. State retention values are sorted alphabetically and default based on global document retention values set in SureClose. These values can be modified as needed.



Note

Editing the retention period does not affect global values or definitions.

From this page, double-click any retention period and update the value to a number between 5 and 99 years.

The screenshot shows the SureClose Admin interface. At the top, there is a navigation bar with 'Admin' selected. Below the navigation bar, there is a 'Document Retention Periods By State' section. A table lists various states and their corresponding retention periods. The table has two columns: 'State Name' and 'Retention Period'. The retention periods range from 5 to 70 years. A 'HELP' icon is visible in the bottom left corner of the interface.

State Name	Retention Period
Alabama	70 years
Alaska	7 years
Arizona	5 years
Arkansas	7 years
California	5 years
Colorado	7 years
Connecticut	10 years
Delaware	20 years
District Of Columbia	5 years
Florida	7 years
Georgia	5 years
Guam	5 years
Hawaii	6 years
Idaho	6 years
Illinois	7 years
Indiana	5 years
Iowa	5 years
Kansas	5 years
Kentucky	5 years
Louisiana	7 years
Maine	5 years
Maryland	5 years
Massachusetts	6 years
Michigan	5 years
Minnesota	6 years
Mississippi	7 years
Missouri	7 years
Montana	7 years
Nebraska	10 years



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Managing Corporate Document Retention Values*.

Document Retention Options

A new radio button, **Use Custom Document Retention Periods**, has been added to the *Compliance and Document Retention* section of the **Corporate Settings and Defaults** page. This option is only available for corporations owned by independent agencies. Use this radio button to apply the corporate document retention values to audit placeholders on the file.

Stewart Direct Operations (affiliate) corporations have their document retention setting defaulted to **Use Global document retention settings**. This setting cannot be changed.



Note

Changes to the document retention settings do not affect any files which were closed prior to the change. The changes to document retention settings only apply to the files closed after the new settings are applied.

The screenshot shows the 'Corporate Settings and Defaults' page in the SureClose application. The page includes a navigation sidebar on the left with options like HOME, FILES, MESSAGES, CONTACTS, CALENDAR, and ADMIN. The main content area is titled 'Corporate Settings and Defaults' and contains several sections: 'Corporation Default File and Party Settings', 'File Defaults', 'Party Defaults', 'File Display Settings', 'Corporation Default Security Profiles by Role', 'Auto Generate File Number', 'Secure Messaging Default Setting', and 'Compliance and Document Retention'. In the 'Compliance and Document Retention' section, the 'Document Retention' options are: 'Use Global document retention periods', 'Use Custom document retention Periods' (highlighted with an orange box), and 'Opt out of assigning retention periods to documents'. The 'Recipient Email Address' field is also visible, containing 'ljuneau@stewart.com'.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Document Retention Options*.

Document Retention Reports

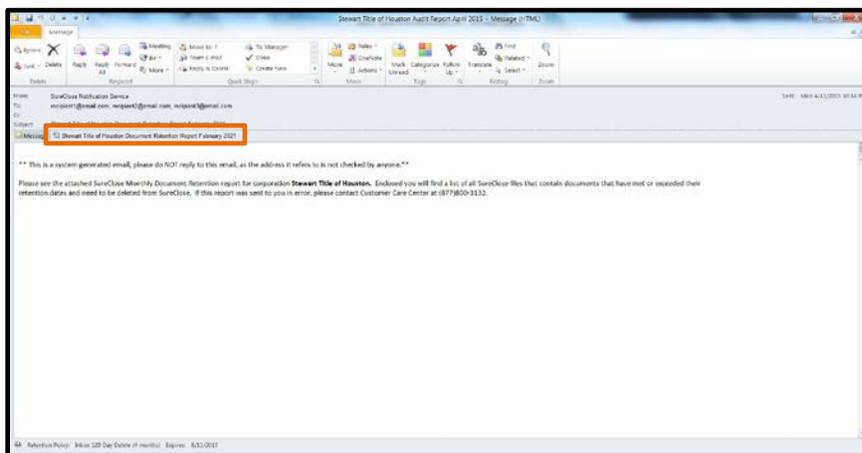
A new **Document Retention Report** has been added and includes a list of all audit documents for a select corporation that have met or exceeded their retention dates. This report is auto-generated on the second Tuesday evening of each month, and delivered to designated recipients via email the following morning.



Note

This report will not be generated for corporations who have selected the **Opt out of assigning retention periods to documents** option in *Corporate Settings and Defaults*.

Document Retention Reports are sent via email notification to parties on the file who have been designated the role of **Primary Contact**.



The Document Retention Reports include the following detail:

- **Company/Branch**—Shows the company/branch name associated with the file that contains the document.
- **Property Address**—Shows the property address associated with the file displayed with complete address along with its city, state and zip details.
- **File #**—Shows the file number associated with the file if it is available otherwise it is blank.
- **Primary Contact1**—Shows the name of the party on the file in the role of Primary Contact displayed as Prefix First Name, Middle Name and Initial Last Name suffix.
- **Primary Contact2**—Shows the name of the second party on the file in the role of Primary Contact displayed as Prefix First Name, Middle Name and Initial Last Name suffix.
- **Document**—Shows the document placeholder name.
- **Retention Date**—Shows the Date of Retention associated with the document.
- **Retention Category**—Shows the Retention Category that the document belongs to based on its retention date and the date the report is run. The retention categories are grouped as 0-30 days, 31-60 days, 61-90 days and more than 90 days.

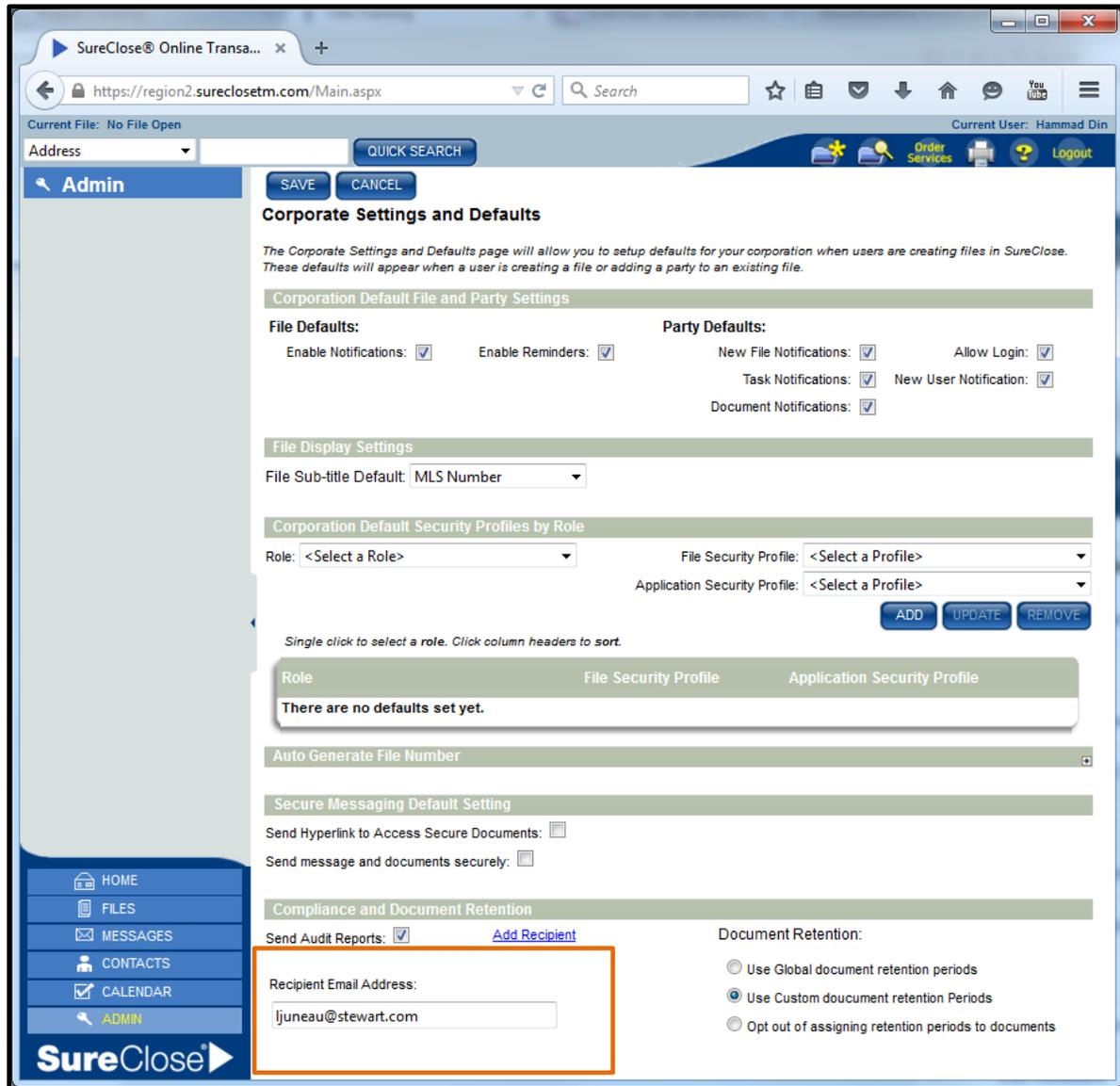


For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Generating Report for Documents Meeting Retention Dates*.

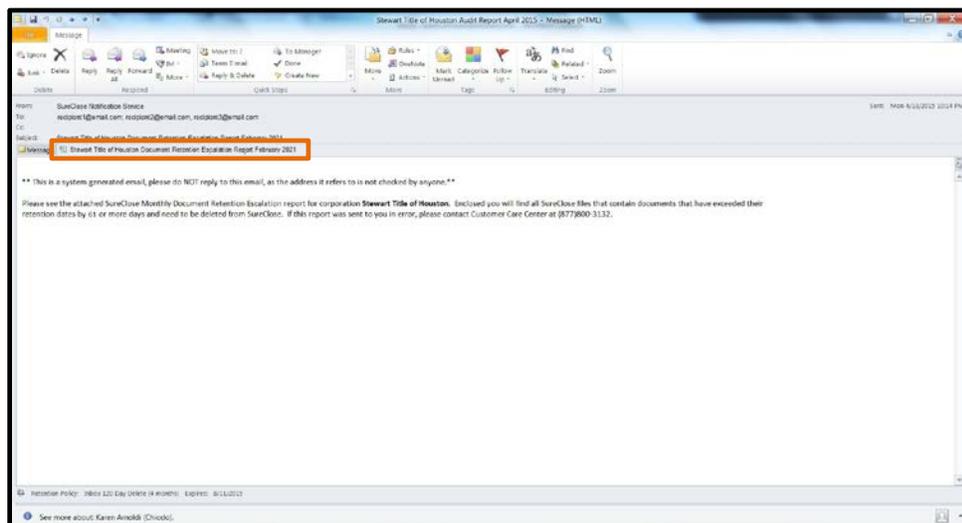
Escalation Report for Document Retention

A new **Document Retention Escalation Report** has been added and includes similar data as the *Document Retention Report*. This report only includes documents that have exceeded their retention date by at least 31 days, categorized into 31-60 day, 61-90 day or <90 day intervals.

Also, the Document Retention Escalation Report is sent to the parties on the file who have the role, **Director of Review**. Other parties included on this report are any other recipients who have been added to the **Recipient Email Address** field on the *Corporate Settings and Defaults* screen, under *Compliance and Document Retention*.



This report is auto-generated on the second Tuesday evening of each month, and delivered to designated recipients via email the following morning.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Generating Document Retention Escalation Report*.

Files

The following enhancements have been made to the Files page.

Viewing Document Retention Reports

A new **Document Retention** button has been added under *Recent Files* on the main menu. Click this button to display items from the latest **Document Retention Report**. The data included in the *Document Retention Report* is filtered, and based on the logged in user. Only users who are primary contacts on the files have access to the report data. To view the report in various ways, click the column headers to sort data, or use the filter options.

The screenshot displays the 'Document Retention Report for October 2015' in the SureClose application. The report is presented as a table with the following columns: Property Address, File#, Document, Retention Date, and Retention Category. The data rows show various file entries with their respective retention dates and categories, such as '>90 days' or '61-90 days'. The interface includes a search bar, filter and clear buttons, and pagination controls. A sidebar on the left shows a 'Recent Files' list and a 'DOCUMENT RETENTION' button. The top navigation bar includes 'HOME', 'FILES', 'MESSAGES (2)', 'CONTACTS', and 'CALENDAR'.

Property Address	File#	Document	Retention Date	Retention Category
DRfile8 with doc Houston TX 77094	215498746	CAudit ph6 with doc	5/8/2015	>90 days
DRfile3 with doc Houston TX	354657489	81 extra ph	5/15/2015	>90 days
DRfile8 with doc Houston TX 77094	215498746	TAudit ph5 with doc	5/15/2015	>90 days
DRfile3 with doc Houston TX	354657489	71 extra ph	5/28/2015	>90 days
DRfile3 with doc Houston TX	354657489	70 extra ph	6/1/2015	>90 days
DRfile3 with doc Houston TX	354657489	80 extra ph	6/7/2015	>90 days
DRfile2 - with doc Katy TX 77494	89756468	49 extra ph	6/13/2015	>90 days
DRfile2 - with doc Katy TX 77494	89756468	44 extra ph	6/15/2015	>90 days
DRfile3 with doc Houston TX	354657489	100 extra ph	6/19/2015	>90 days
DRfile3 with doc Houston TX	354657489	95 extra ph	6/19/2015	>90 days
DRfile1 with doc, testing file Suite 101 Katy TX 77494	87684654	17 extra ph	6/22/2015	>90 days
DRfile3 with doc Houston TX	354657489	68 extra ph	6/22/2015	>90 days
DRfile1 with doc, testing file Suite 101 Katy TX 77494	87684654	16 extra ph	6/25/2015	>90 days
DRfile3 with doc Houston TX	354657489	67 extra ph	6/25/2015	>90 days
DRfile3 with doc Houston TX	354657489	69 extra ph	7/3/2015	61-90 days
DRfile2 - with doc Katy TX 77494	89756468	41 extra ph	7/15/2015	61-90 days
DRfile3 with doc Houston TX	354657489	92 extra ph	7/15/2015	61-90 days
DRfile1 with doc, testing file Suite 101 Katy TX 77494	87684654	28 extra ph	7/19/2015	61-90 days
DRfile3 with doc Houston TX	354657489	79 extra ph	7/19/2015	61-90 days
DRfile7 with doc Apt 2202 Katy TX 77494	468794645	YAudit ph7 with doc	7/19/2015	61-90 days

The following items display on the *Document Retention Report*:

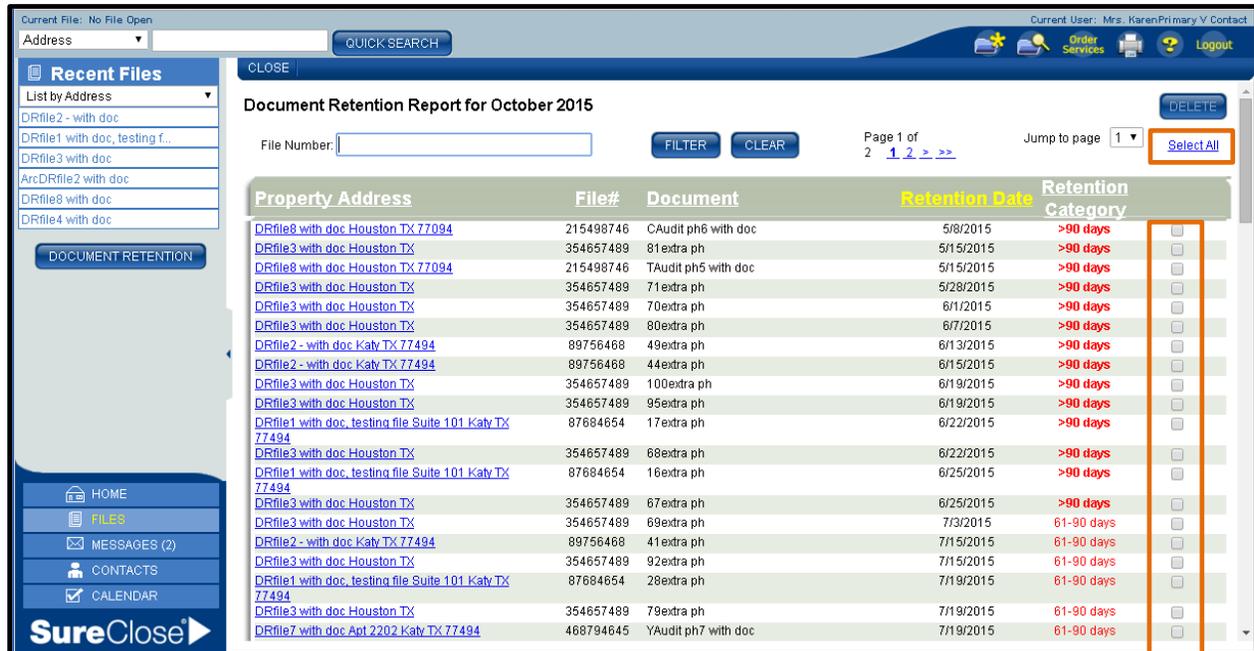
- **Property Address**—Shows the Property Addresses of the files which the documents reside in.
- **File Number**—Shows the File Number of the files.
- **Document**—Shows the Document Placeholder name.
- **Retention Date**—Shows the retention date for the document.
- **Retention Category**—Shows the document Retention Categories that the document belongs to.



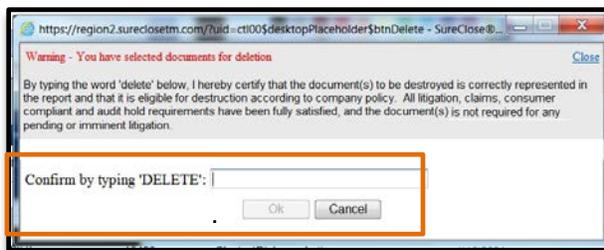
For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Viewing/Deleting Document Retention Report*.

Deleting Document Retention Reports

A new column of check boxes has been added to the **Document Retention Report** page. Use this option to select one or more documents to delete. To select all documents for deletion, click **Select All**.



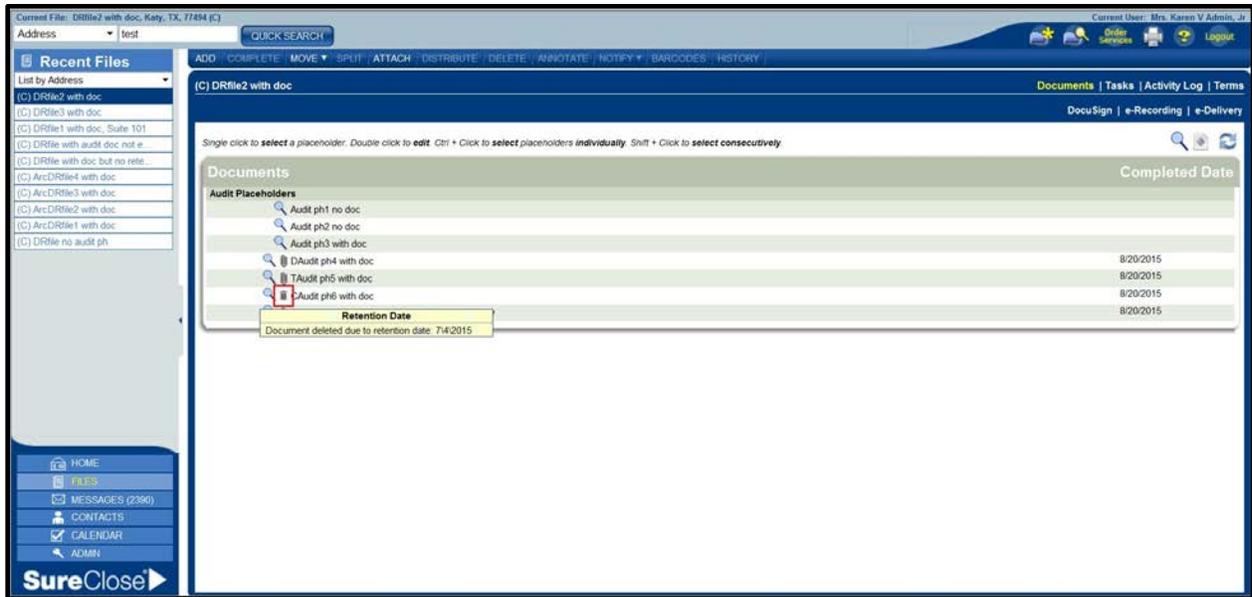
Once the check box or multiple check boxes are selected, the **Delete** button becomes enabled. Click **Delete** to display a pop-up message, confirming your request to delete documents. To continue, you must type the word **Delete**, then click **OK** to complete the deletion.



A success message displays indicating that the selected document(s) has been queued for deletion. All queued documents are deleted as part of a batch process which runs nightly.

When a document is queued for deletion, the filter results will refresh to display the report without the deleted documents.

Any documents deleted via the **Document Retention Report** are removed from the placeholders. However, the placeholder remains intact and displays with a **Trash can** icon instead of a paperclip to indicate the document was deleted from the document retention report. These icons are for display only; to indicate documents have been removed and cannot be selected for any action.



Once a document is queued for deletion, the filter results will refresh to display the report without the deleted documents.



For complete step-by-step instructions, refer to SureClose Advantage Help and search for the topic labeled, *Viewing/Deleting Document Retention Report*.

Print Complete List of Document Placeholders

Previously, when printing a list of document placeholders on a file, the screen cut off listings. Now you can print a complete list of all document placeholders on a file.

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 Customer Care at 1.877.800.3132 or customercare@propertyinfo.com.