Agreement Express Release Notes
Release 20.10
7.23.2020

Release 20.10

The 20.10 Release is scheduled for deployment on **July 22nd, 2020**. Updates will be available in your production environment on **July 23, 2020** unless otherwise noted. Included in this release will be some enhancements to some net-new features currently in Pilot Phase as well as net new integrations coming this Fall! The updates below, however, are enhancements to current features you may already be familiar with! Please reach out to your CSM should you have any questions about this release or its impact to you or your end clients.

AEX FEATURE UPDATES

LexisNexis Identity Verification (IDV) Replaced with EAP IDV

Why did we make this change?
The LexisNexis ID verification for the Fidelity New Account Openings Process asks multiple personal questions that we were finding was a challenge for some end clients. In an effort to ensure the End Client is able to complete the signing of the agreement, we have changed the ID Verification to an SMS verification process to streamline their ability to sign the form.

Who is impacted by this change?
All companies subscribed to the Custodian, Fidelity with LexisNexis enabled for end clients, will be affected by this change. The major user affected will be the end user who no longer needs to answer the identity verifying questions in order to sign a form sent out by a firm.

TDA, will continue to leverage LexisNexis IDV for end clients.

Is any Action Required? No action is required in order to activate this new feature. If you have specific concerns about how this change affects your clients, please feel free to reach out to your CSM directly.

Description:

Fidelity account opening will no longer use LexisNexis to perform user ID verification. Fidelity accounts will now use SMS verification to validate user identity. Publishers will leverage the Enhanced Access Protection Process, i.e. provide the signer's phone number when sending an account opening package . Before being able to access the account opening package the signer will receive a text message to verify their identity. This approach simplifies the signer experience and eliminates the chance a signer might not remember the answer to the LexisNexis questions.

The Fidelity Certificate of Completion will no longer have LexisNexis verification in the verification details. SMS verification information will be displayed for all Fidelity account opening packages. All Fidelity Service Teams have been made aware of this and will continue to approve transactions received without this LexisNexis verification on the COC report.

Transaction viewable by Publisher if in Approval State

Why did we make this change?

Previously, a transaction in a state that required an approval did not appear nor was it searchable by a user with Publisher rights. This occurred whether it was grouped by case or not. As a result, publishers were finding they were missing approving the transactions they had initially published because the transactions were not visible to them when in approved state. By making these transactions searchable in workspace, a Publisher becomes aware of transactions requiring their approval.

Who is impacted by this change?

Transactions requiring an approver will now appear visible to publishers in the workspace.

Action Required

There is no action to take in order to activate this new feature.

Description:

Transactions in approval state have the following updated visibility in Workspace:

- Transactions in Cases (Transactions) waiting for approval are visible for the Publisher (not for anyone who has access via Workgroups) in Workspace.
- Cases (Transactions) waiting for approval show up in Workspace as any other visible cases, Transactions have Active status.
- Cases (Transactions) are searchable and are seen in search results when waiting for approval.

Reporting Enhancements

Why did we make this change?
When leveraging The Bulk Send Feature, Publishers are looking at hundreds and possibly thousands of transactions. This can be overwhelming and confusing to a user who is trying to understand what needs to be actioned next! New Data will now be available to create a custom report on the following fields:

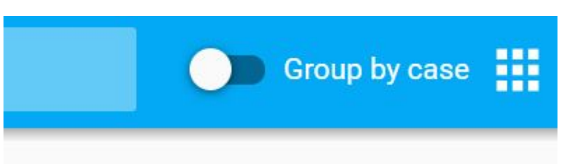
1. Approved By
2. Pending Approval
3. Company Tags
4. Current Signers
5. Current Signing Level
6. Data Dictionary Field
7. Permission Tag
8. On Level Since
9. Web Service

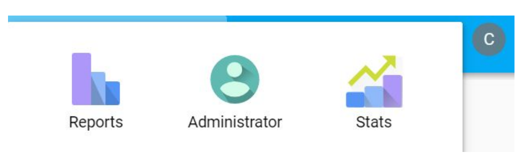
Publishers and Company Administrators will get much quicker insight into who needs to sign and approve next in order to reduce bottlenecks in the workflow of the transaction.

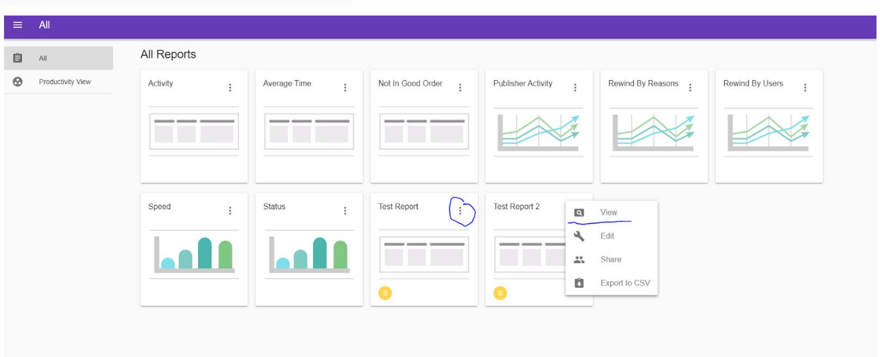
Who is impacted by this change? All Publishers and Company Admin with access to the Reports feature in AEX

Action Required: No action is required in order to activate this new feature. This data will be available as a filter when creating a new report. However, there will be further documentation circulated to those interested for more details on how to use this specific feature. If this is of interest to you, please contact your CSM to ensure the detailed documentation is sent to you directly.

Description: The following New Reporting Data is now available in the Reporting UI: Transition Name, Current Signing Level, Current Signers, On Level Since, Pending Approval, Approved, API Submitted. In order to access, go to the **3x3** grid and click on the **Reports** tab:







Publisher Role - Reporting Filtering

Why did we make this change? We heard from some users that there was concern that some Publishers could view data from other Publishers in the Reports section. Though all company data is viewable, it would be preferable to have this controlled through a user level such as the Company Administrator.

Who is impacted by this change? Any Publisher who currently has access to reports will now only be able to view data from transactions they published. Company Administrators will continue to see the same amount of data in the Reports section as they were able to previously.

Action Required: No action is required in order to activate this new feature.

Description: Publishers will only see data for agreements that they created within the following Reports (Image above): Activity, Avg Time, Not in Good Order, Rewind by Reasons, Speed, Status, Productivity View

FEATURE UPDATES

Enhancements to Bulk Send Feature

Why did we make this change? The Priority fields for each transaction are searchable, but also need to be viewed on each transaction in order to create greater visibility of the individual transaction.

Who is impacted by this change? Any Publisher/Company Administrator who is navigating the new Bulk Send UI will have access to these priority fields in each individual Transaction Cards.

Action Required: No action is required in order to activate this new feature. This data will be available in all net new transaction cards in the Bulk Send UI.

Description: Priority fields (as below) are now available on Case Cards along with their inclusion in the search filter in the new bulk send UI (added in Release 20.09)