Sircon 5.2 Release Training Recording Available

Release training was held on February 24 at 2:00 pm ET covering some of the new items in the upcoming release. Links to that webinar are available below.

Streaming recording link:
https://sircon.webex.com/sircon/ldr.php?AT=pb&SP=MC&rID=50745487&rKey=76655062434bba8c

Download recording link:
https://sircon.webex.com/sircon/lsr.php?AT=dw&SP=MC&rID=50745487&rKey=84a3420c2d2ea480

Sircon customer support is available to assist with any questions or concerns you may have regarding this release.

Sircon for Carriers
Sircon for Agencies/Brokerages
Release Notes
Version 5.2

This production release of the next version of Sircon for Carriers and Sircon for Agencies/Brokerages features several user interface enhancements, code enhancements and bug fixes. It will be released to the production environments on Saturday, March 6, 2010.

Comments or suggestions? Contact us at feedback@sircon.com. We value your input.

Sircon Training

If you want training on Sircon for Carriers or Sircon for Agencies/Brokerages, please ask your Sircon sales representative about Sircon's training services.

Overview

This production release features several user interface enhancements, code enhancements and bug fixes. This section provides a high-level overview of the types of changes that were made. The detailed breakdown of each specific change is included in the remainder of the document.

Producer Manager Menu Updates

- The Company Administration module and the Producer Licensing module have been combined, removing the need for modules in Producer Manager.

- The Non-Licensed Individual entity has been removed from the product. As a result, the Miscellaneous tab has been removed from the Producer Manager menu.

New North Dakota NPN Requirement

- North Dakota now requires NPN to be submitted with all appointment and appointment termination requests. Sircon will now automatically look up the producer's NPN prior to submitting these requests.

New Massachusetts Identity Theft Regulation

- In compliance with new Massachusetts identity theft regulations, clients can recall Sircon login activity as far back as 90 days.

Password Management

- Password requirements will now be configurable across all Sircon products. Administrative users can update the password strength requirements for all of their users from a central location.

- The encryption algorithm used for passwords has been upgraded to a stronger pattern.

Enhancements and Improvements (All Users)

Interface Improvements

- **Combined Company Administration and Producer Licensing**: As part of an ongoing effort to enhance the Producer Manager user interface, the separate "modules" have been removed from Producer Manager. The functions previously available in the Company Administration module have been moved to the Producer Licensing module as a separate menu option labeled "Companies." All functionality previously available in the Company Administration module is now available through this menu. **PM** (MKT-5783)

- **Removed Non-Licensed Individual Functionality**: The ability to add or modify records for non-licensed individuals has been removed from Producer Manager. This little-used functionality was the only item accessed through the Miscellaneous menu, which has also been removed. For those clients with existing records for non-licensed individuals,

the records will be converted to the standard "Review/Update Individual" record (with no license), which will allow clients to include unlicensed individuals in any reports they run. **PM** (MKT-160)

- **Subscriber Notices**: Important regulatory updates and notices are displayed on the home page of Producer Manager. Several enhancements have been made to the way these display to increase the usability of the section.

  o The notices are now loaded independently from the rest of the page, improving the overall performance of the page.

  o Notice text has been consolidated for readability. The full text of the first notice will be displayed, and for any subsequent notices, the title of the notice and the first line of the message will be displayed. Users can expand a collapsed notice to view the full message text. All notices will be expanded if the user selects the "Show All" link at the top of the section. **PM** (MKT-5727)

New State Regulations and Processing Requirements

- **North Dakota**: North Dakota now requires the National Producer Number (NPN) to be submitted with all appointment and appointment termination transactions. Producer Manager and Producer Express have been updated to automatically send this information with those transactions. If the producer does not have an NPN on their record, then the system will attempt to perform a free lookup of the NPN. If successful, the transaction will continue to process normally. If unsuccessful, then the transaction will stop and indicate that an NPN is required. The user will have the option to manually update the NPN on the Review/Update Individual page in Producer Manager if they know the appropriate value and resubmit the transaction. **PX**/**PM** (MKT-5708)

- **Massachusetts:** In compliance with new identity theft regulations set forth by the Massachusetts Office of Consumer Affairs and Business Regulation (OCABR), clients can recall Sircon login activity as far back as 90 days, with Sircon assistance. Clients facing an OCABR audit and who require this information can call Client Support for assistance at: 517.381.3870. **PX**/**PM** (MKT-5755)

Password Policies

- **Password Policies:** There is now a single point of configuration for Password Policies throughout Sircon products. An administrator can modify the Password Policy applied to all users in the account by going to the "Maintain Password Parameters" option within the Compliance Express Administration menu. The administrator can configure the following options:

  o Require a lowercase letter in a new password

  o Require an uppercase letter in a new password

  o Require a number in a new password

  o Require a special character (symbol) in a new password

      o   Set the length required for a new password

      o   Set how many passwords are "remembered" to keep the user from reusing the same password again and again

      o   Set how often passwords expire

As part of this change, administrators will no longer be able to specify which special characters a user can include in a password. Instead, a default list of symbols will be used. This list of symbols is displayed to the administrator when configuring the Password Policy. **PX**/**PM** (MKT-94, MKT-5715)

- **Account Lockout for Failed Login Attempts**: When a user's account is locked out due to failed login attempts, the account will automatically unlock after 15 minutes. An administrator can also unlock a user's account by resetting the password. **PX**/**PM** (MKT-5715)

Miscellaneous

- **License Renewal Notifications**: Many email spam filters are configured to reject e-mails if the "From" email address does not match the email address that sent the email. To prevent license renewal notification emails from being blocked by spam filters, the "From" address will now be notifications@sircon.com. Any replies will still be sent to the user specified "Reply To" email address. Clients may configure a "From" address other than notifications@sircon.com by contacting their assigned account representative. **PM** (MKT-5882)

- **Reassign Child Agreements**: When reassigning child agreements to another producer or firm, the wizard includes a section for child agreements that could not be moved given the hierarchy structure. The functionality has been enhanced so the unmovable child section will not appear if all child agreements can be moved. **PM** (MKT-5767)

- **DTCC Processing**: DTCC transaction processing has been updated to conform to DTCC's March 2010 enhancement release. **PX** (MKT-5805)

- **Appointment County Terminations**: If no electronic termination method exists for appointment county terminations in Florida, the application will now default the submission type to "Paper." **PM** (MKT-5774)

Integration

Producer Manager Inbound Data Feed

- **Inbound Webservice**: The Producer Manager Inbound Webservice now supports milliseconds for dates. **PM** (MKT-5769)

Note: The Inbound Webservice is not user-enabled and must be activated through a paid engagement with Sircon's Managed Services. Contact your Sircon sales representative for more information.

Resolved Issues

- Replaced the word "COSMOS" with "SfS," in the "Request Type" column on the Appointment Request Status inquiry results for any appointment request that has been submitted to any Sircon State. "SfS" refers to Sircon's "Sircon for States" product. **PM** (MKT-5174)

- Fixed an issue in Internet Explorer where the user was required to paste twice when attempting to paste an External System ID on the Producers with Missing Upline Hierarchy inquiry page. **PM** (MKT-5785)

- Fixed an issue where the Assign Parent Agreement page would occasionally display a blank screen after a search for parent agreements. **PM** (MKT-5813)

- Fixed an issue where, for some clients, a transaction that should have had a letter attached did not have the actual letter attached. **PX** (MKT-5842)

- Fixed an issue where some clients were able to upload documents during the recruiting/interviewing process, but no document type was assigned, causing an error in the Image Feed. **PX** (MKT-5857)

- Fixed an issue for clients using DTCC transactions where PX was not properly updated with information being pulled from PM. **PX**/**PM** (MKT-5121)

- Resolved an issue where the max length of user IDs in the Producer Manger Outbound Data Feed schema was shorter than the length allowed for user IDs in Producer Manger, causing an occasional error. Technical release notes, including an updated schema, have already been sent to clients. **PM** (MKT-5741)

- Fixed an issue with syncing county appointments in Florida due to case sensitivity when syncing counties. **PM** (MKT-5879)

- Fixed an issue where failing license renewal notifications for one customer occasionally caused other customer's notifications to fail. **PM** (MKT-5880)

- Fixed an issue with the Advanced Filter options on PDB reports, where it was possible for state filter checkboxes and/or labels to get cut off. **PM** (MKT-5881)

- Fixed an issue where clicking one "Recently Viewed Producer" link on the home page, and then a clicking a second link before the page loads caused the "Review Update" page that finally displayed to contain a mixture of information from the two records. **PM** (MKT-5922)

- Fixed an issue with the Outbound Data Feed where AppliedCourses were not correctly being extracted when referenced from multiple CourseRequirements. **PM** (MKT-5930)

- Fixed an issue where, for some customers, onboarding Evites were not being sent to the contact but to the agency principle. **PX** (MKT-5959)

- Fixed an issue where Bulk Transaction Processing did not allow an agency packet to be created, only individual packets. Bulk Transaction Processing now allows the creation of both agency and individual packets. **PX** (MKT-5965)

- Fixed an issue that caused an error when a user in the "Recruiter" role attempted to close a lead. **PX** (MKT-5994)

- Fixed an issue with the Producer Manager Outbound Data Feed where the Hierarchy ID was not being exported correctly. **PM** (MKT-6000)

Symbol Legend

Many items in this document are denoted with a product-specific symbol:

- An item denoted with a **PM** symbol indicates a change that applies to Producer Manager.

- An item denoted with a **PX** symbol indicates a change that applies to Producer Express.