

# Lexis Convey v18.4.0

## Release Notes

2024/05/14

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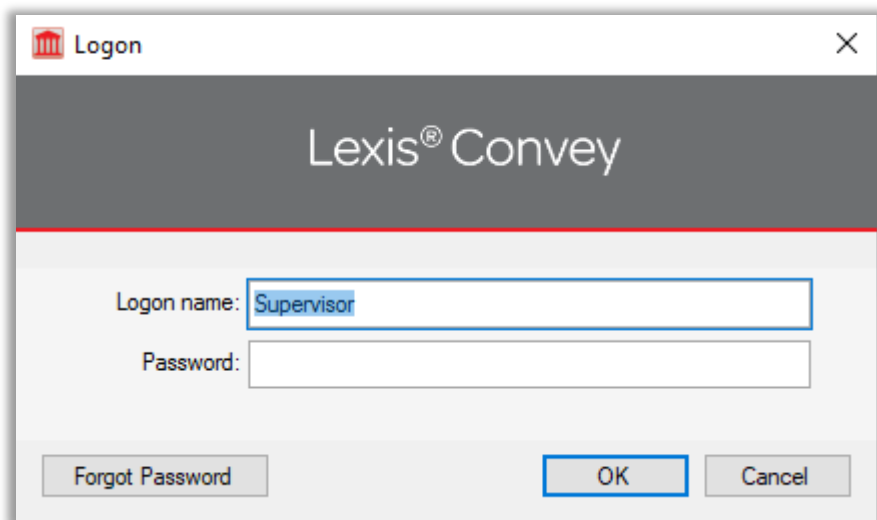
## Lexis Convey - Password Management

The Lexis Convey password management has been enhanced by implementing the password policy. In today's digital landscape, safeguarding user accounts is paramount. By promoting stronger password practices, we enhance security and safeguard sensitive information.

Lexis Convey Logon dialog has been updated

The Logon dialog has been updated as follows:

- **Logon Name** field: Instead of selecting from a list, the user will now enter the logon name directly into a text box.
- **Change Password** button: The **Change Password** button has been removed. Password changes will now be enforced.
- **Forgot Password** button: A new **Forgot Password** button has been added. The **Forgot Password** allows the user to request a password reset if needed.



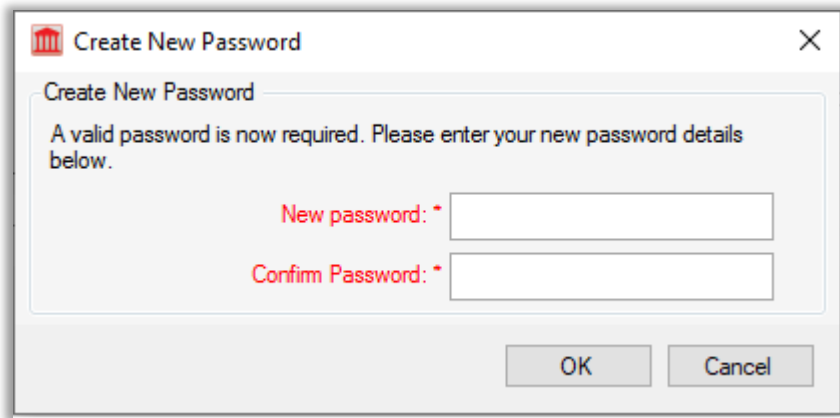
### *Existing User*

An existing user, upon logging on, will be prompted to create a password before gaining access to Lexis Convey.

To logon, access the Lexis Convey logon dialog and capture the logon name in the provided field.

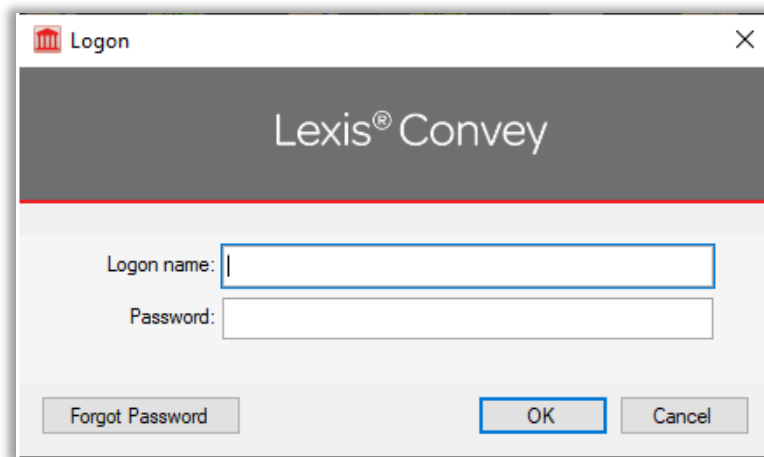
Once the user clicks the **OK** button, a popup dialog will be displayed, and will be required to create a new password.

Capture the new password and click the **OK** button to save.

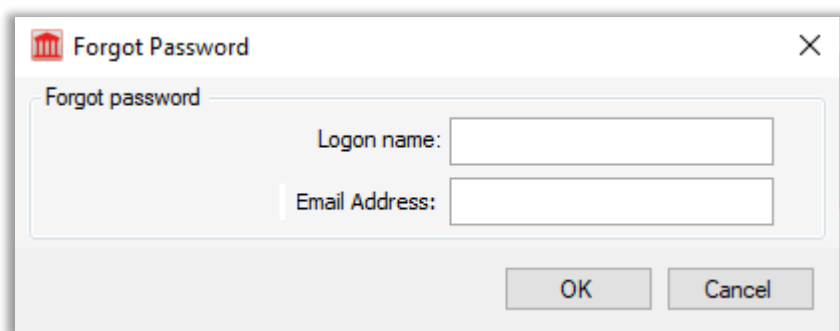


### *Forgot Password*

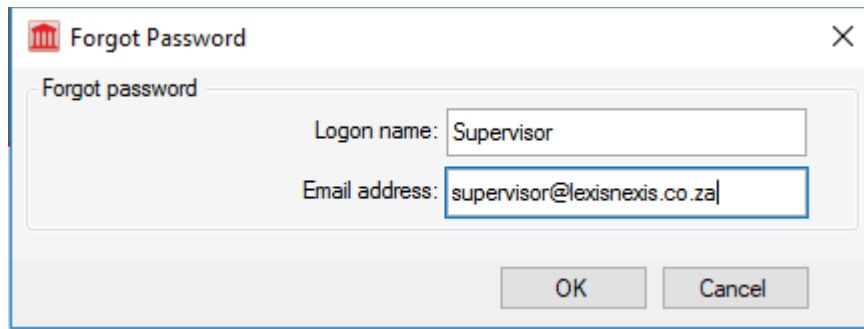
A new **Forgot Password** button has been added to the Lexis Convey logon dialog. An existing user will now be able to reset their password by clicking the **Forgot Password** button.



Once clicked, the user will be presented with a blank popup screen.

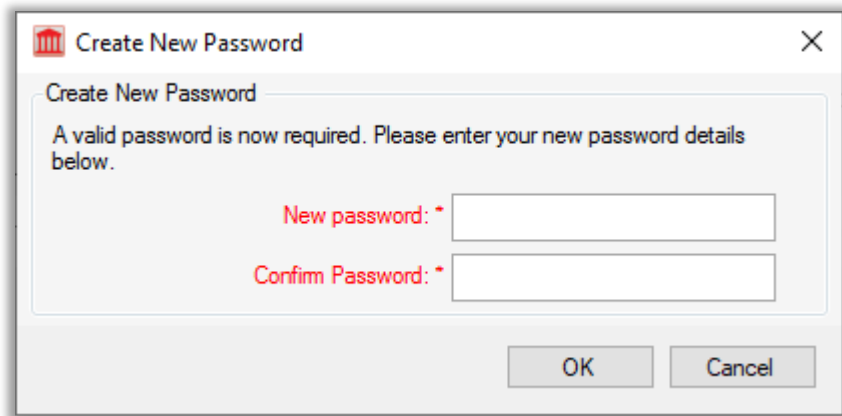


Capture the required information and click the **OK** button.



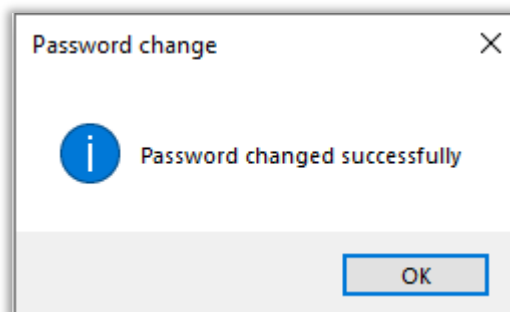
The 'Forgot Password' dialog box contains a title bar with a red icon and a close button. The main area is titled 'Forgot password' and contains two input fields: 'Logon name:' with the text 'Supervisor' and 'Email address:' with the text 'supervisor@lexisnexis.co.za'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Once the **OK** button is clicked, a temporary password will be generated and emailed to the user. Check the email for the temporary password and copy it to use it for logging on for the first time. When logging on for the first time, use the temporary password, then a prompt to change the password will be displayed. Make sure to choose a strong and unique password.



The 'Create New Password' dialog box has a title bar with a red icon and a close button. The main area is titled 'Create New Password' and contains the text: 'A valid password is now required. Please enter your new password details below.' Below this text are two input fields: 'New password: \*' and 'Confirm Password: \*'. At the bottom right, there are 'OK' and 'Cancel' buttons.

Capture the required information and click the OK button. Clicking the **OK** button will display the confirmation popup screen.



The 'Password change' dialog box has a title bar with a close button. The main area contains a blue information icon followed by the text 'Password changed successfully'. At the bottom right, there is an 'OK' button.

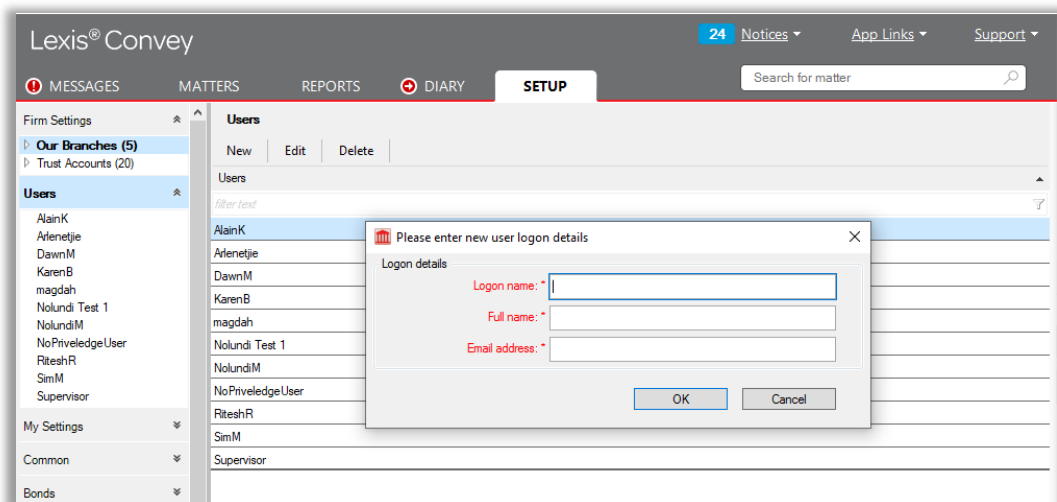
## Setup: Add New User details page has been updated

The following fields have been added to the New User page is Setup:

- Full Name
- Email Address

The following fields have been removed from the New User page in Setup:

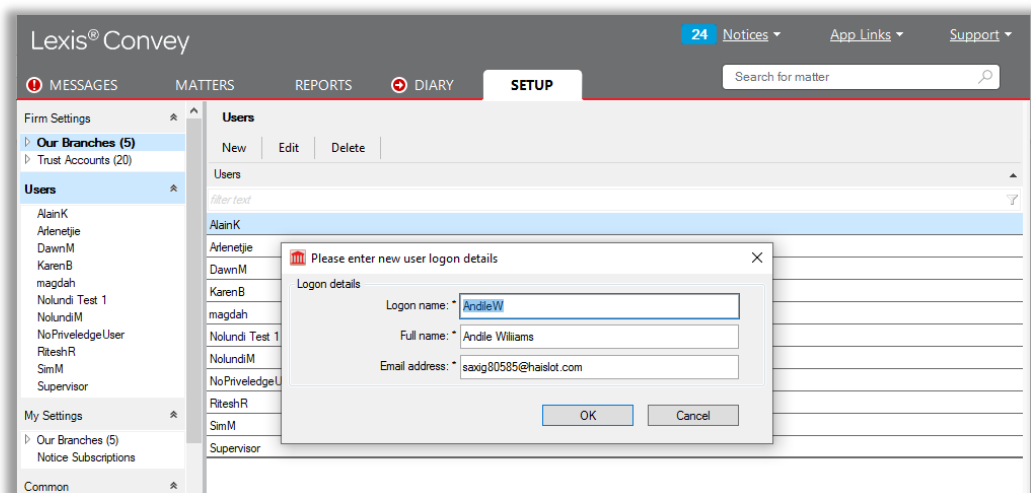
- Password
- Confirm Password



### Adding a new user

The process of adding a new user has been updated. Instead of the Supervisor capturing the password, a temporary password will now be generated and emailed to the new user.

To add a new user, the Supervisor will be presented with a blank popup screen. Capture the new user details and click the **OK** button.



Once the **OK** button is clicked, a temporary password will be generated and emailed to the user.

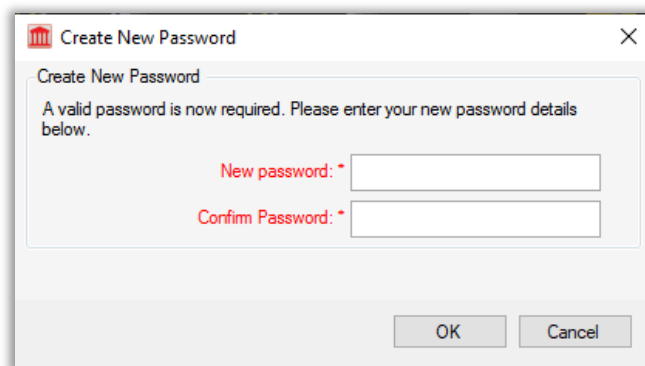
As a new user, they will need to follow these steps:

- Check the email for the Temporary Password.
- When logging on for the first time, the user will be prompted to change their password. Make sure to choose a strong and unique password.

### *New User Logon*

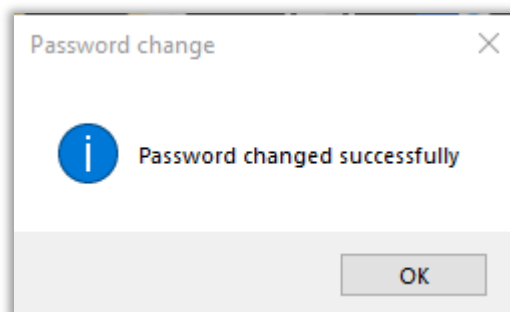
To logon as a new user, access Lexis Convey logon dialog and complete the new Logon Name and Temporary Password that was emailed.

Once the **OK** button is clicked, the user will be presented with a new entry.



Complete the required information and click the **OK** button to save.

Once the OK button is clicked, a confirmation popup screen will be presented.



Clicking the **OK** button will open the Lexis Convey application.

## Setup: Advanced Settings have been updated

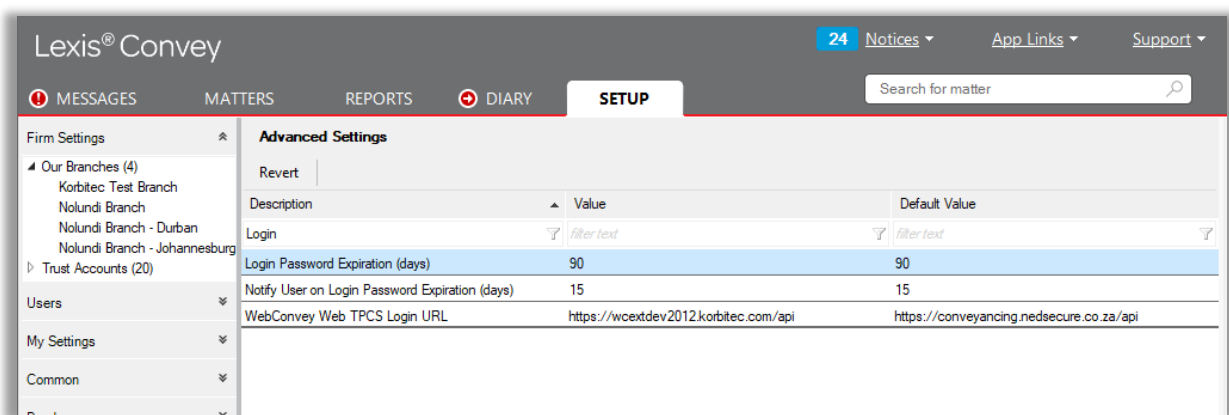
The following new settings have been added to the Advanced Settings page:

- Logon Password Expiration (days)
- Notify user on Password Expiration (days)

### *Logon Password Expiration (days)*

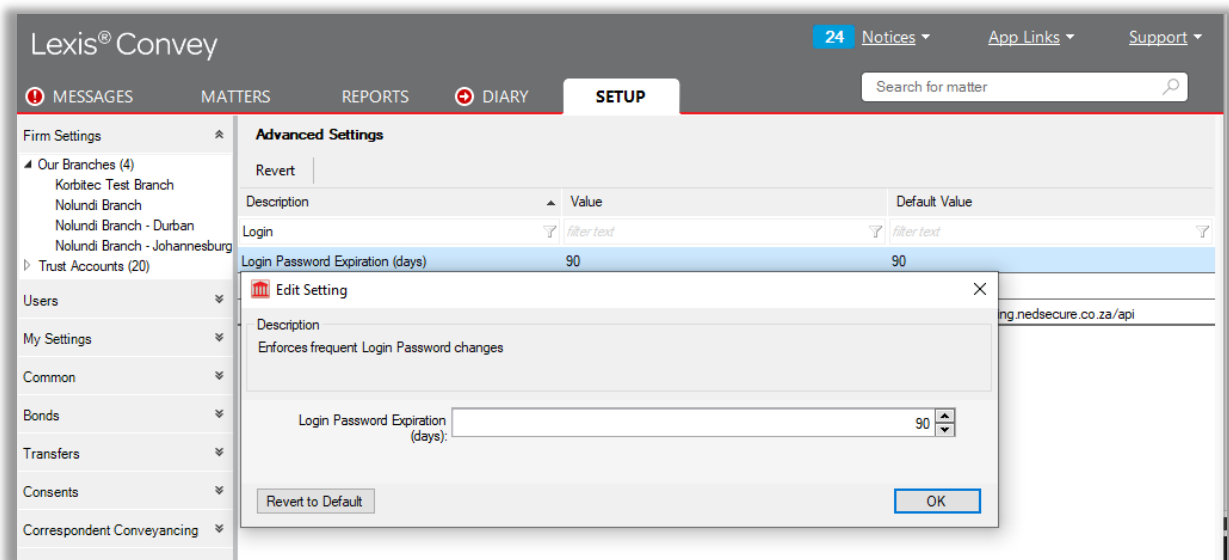
A password will be valid for at least 90 days from the day it is created. When the 90-day period is about to expire, a notification will be displayed to change the password.

The minimum number of days that the password remains valid will be configured in the **Logon Password Expiration (days)** setting.



To configure this setting, access the Advanced Settings page and click the **Logon Expiration Password (days)** setting.

Once clicked, the user will be presented with an entry.



Complete the required information according to the field and click the **OK** button to save.

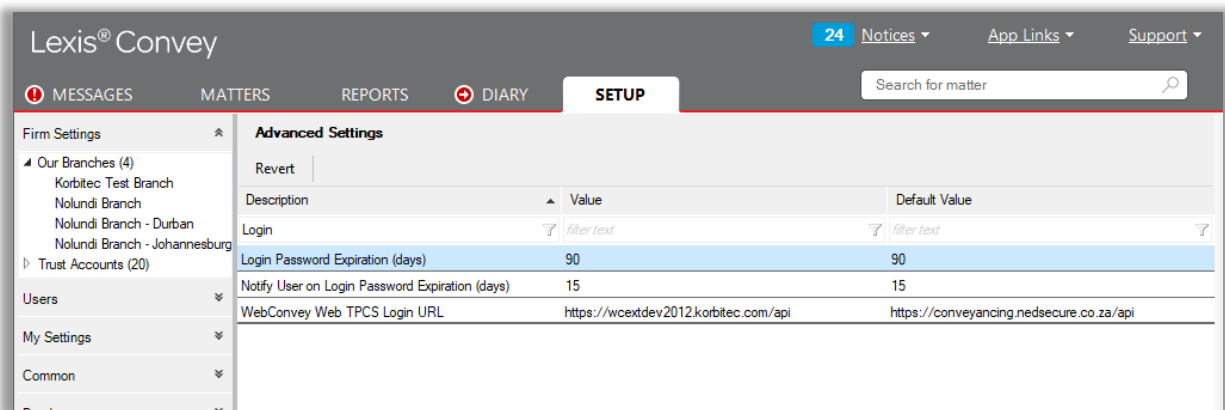


## Notify User on Password Expiration (days)

When a password is created, a countdown begins, indicating the number of days remaining before the password expires. A notification will be displayed when the countdown reaches a specific number of days.

The number of days remaining before the password expires will be configured in the **Notify User on Password Expiration (days)** setting.

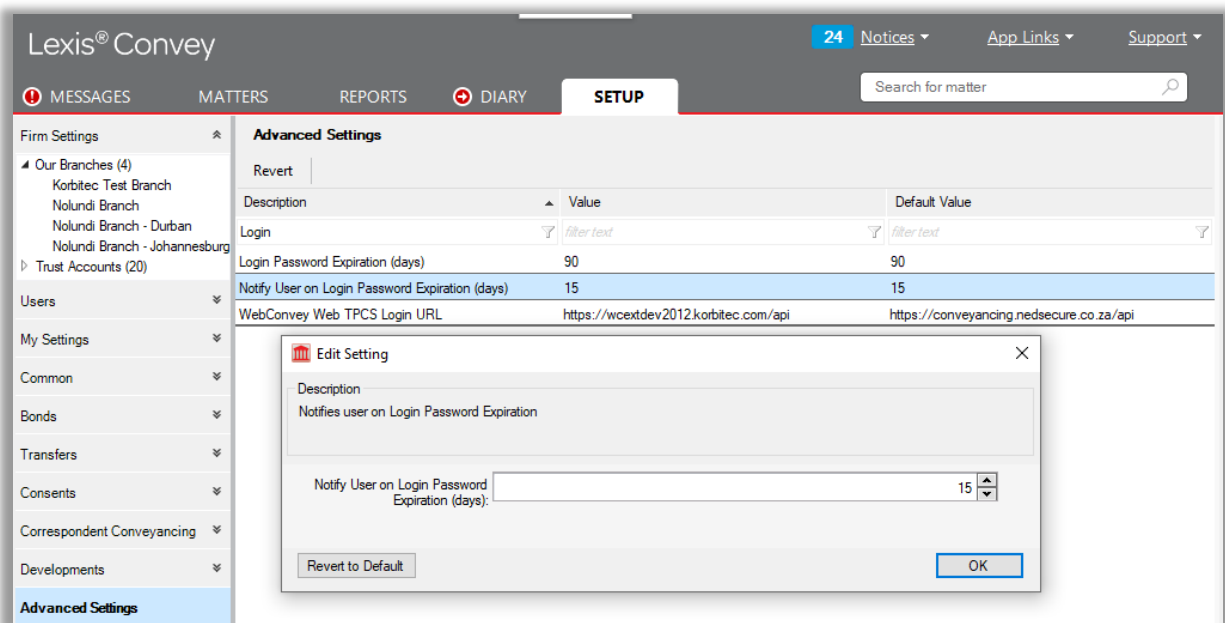
To configure this setting, access the Advanced Settings page and click the **Notify User on Password Expiration (days)** setting.



The screenshot shows the LexisConvey interface with the 'SETUP' tab selected. The 'Advanced Settings' section is active, displaying a table of settings. The 'Notify User on Login Password Expiration (days)' setting is highlighted in blue.

Description	Value	Default Value
Login	<input type="text" value="filter text"/>	<input type="text" value="filter text"/>
Login Password Expiration (days)	90	90
<b>Notify User on Login Password Expiration (days)</b>	<b>15</b>	<b>15</b>
WebConvey Web TPCS Login URL	https://wextdev2012.korbitec.com/api	https://conveyancing.nedsecure.co.za/api

Once clicked, the user will be presented with an entry.



The screenshot shows the LexisConvey interface with the 'SETUP' tab selected. The 'Advanced Settings' section is active. An 'Edit Setting' dialog box is open, allowing the user to modify the 'Notify User on Login Password Expiration (days)' setting. The dialog box contains a description, a text input field, and a numeric input field set to 15. There are 'Revert to Default' and 'OK' buttons.

**Edit Setting**

Description: Notifies user on Login Password Expiration

Notify User on Login Password Expiration (days):

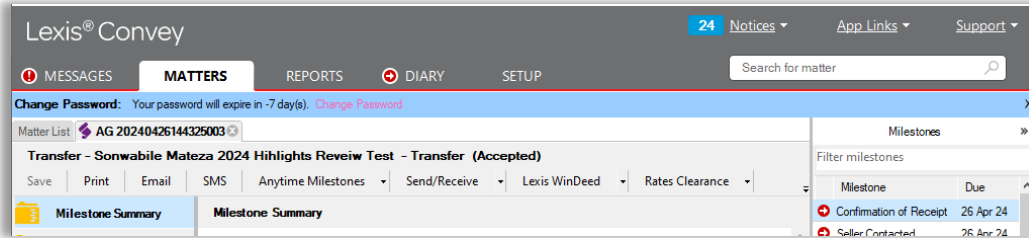
Revert to Default OK

Complete the required information according to the field and click the **OK** button to save.

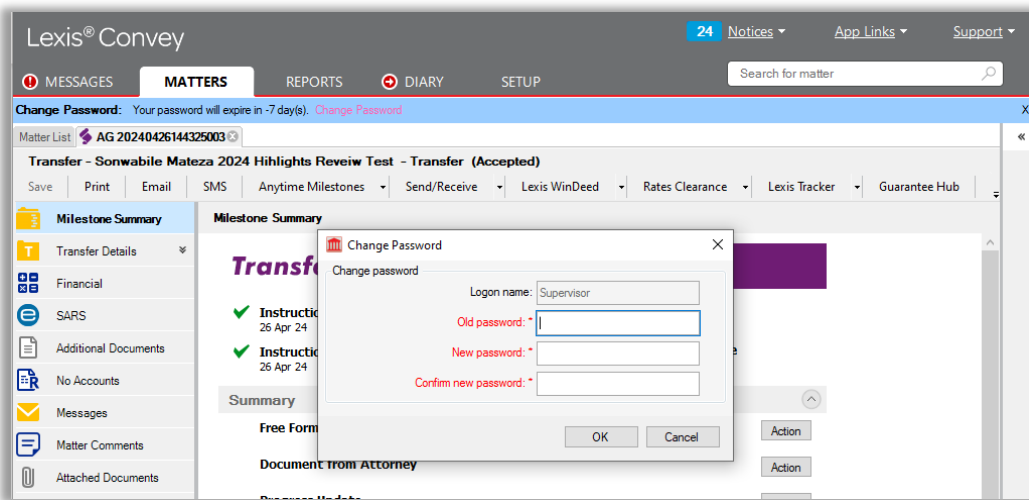
Once saved, the newly added setting will be displayed in the **Notify User on Password Expiration (days)** field.

## Password Expiration notification

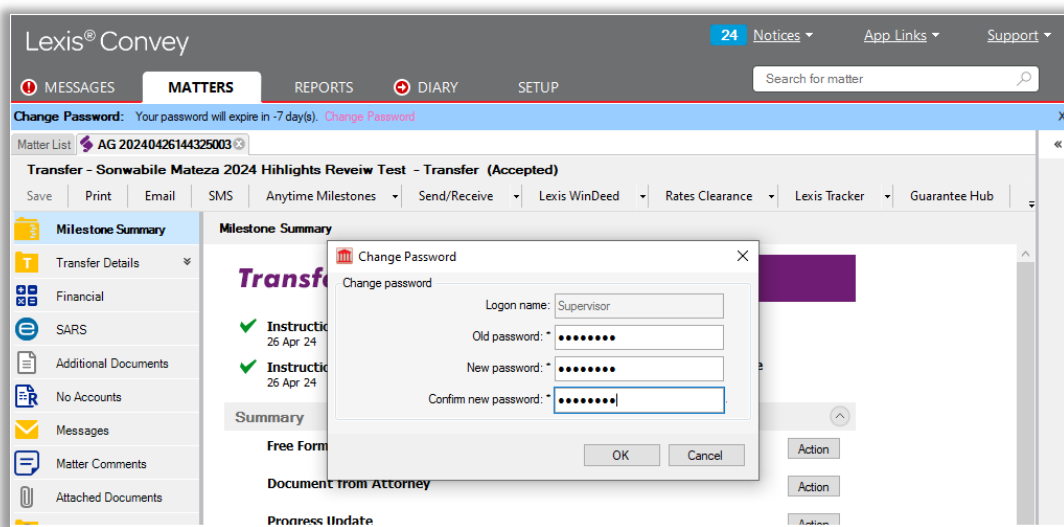
The password expiration notification will be presented on a banner with the **Change Password** link to change their password.



When the **Change Password** link is clicked, the user will be presented with a new entry.



Complete the required information according to the fields and click the **OK** button to save.



Please use the new password going forward.

## Setup: My Settings page has been updated

A new **Change Password** setting has been added to the **My Settings** page.

Now, the Supervisor will no longer be responsible for changing user's password.

This will enable users to change their passwords at any given time.

The screenshot shows the LexisConvey 'My Settings' page. The left sidebar contains a tree view with categories like Firm Settings, Users, My Settings, Common, Bonds, Transfers, Consents, Correspondent Conveyancing, Developments, Advanced Settings, Account Items, Messages, and Milestone Process Configurat... The 'My Settings' category is expanded, and the 'Change Login Password Settings' section is highlighted. This section contains a 'Login name' field with the value 'Supervisor' and a 'Change Password' button. Other sections include General Settings (checkboxes for 'Always save between matter tabs?', 'Close send/receive dialog when done?', 'Enable document centre?', 'Always save documents?'), document save paths for Bond, Transfer, Development, Consent, and Correspondent documents, Matter List Settings (dropdown for 'Customise matter list' and 'Matter list batch mode enabled'), and Rodel Settings (field for 'Rodel Credentials' and 'Set Credentials' button).

To change password, click the **Change Password** button.

This screenshot is identical to the previous one, but with a 'Change Password' dialog box open in the foreground. The dialog box has a title bar 'Change Password' and a close button. It contains a 'Login name' field with 'Supervisor' and three password fields: 'Old password', 'New password', and 'Confirm new password'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

On the popup, capture the required information.

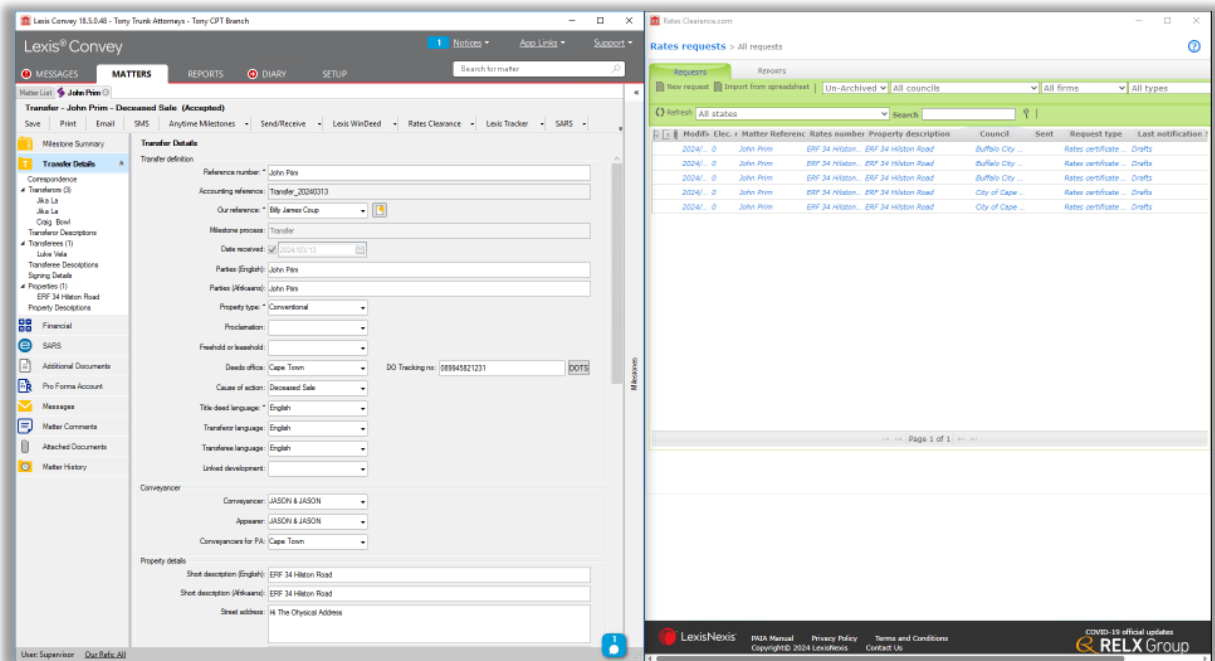
Click **OK** to Save.

# Lexis RatesClearance and Lexis WinDeed Popup Windows have been Enhanced

## Lexis RatesClearance

The Lexis RatesClearance popup window has been enhanced.

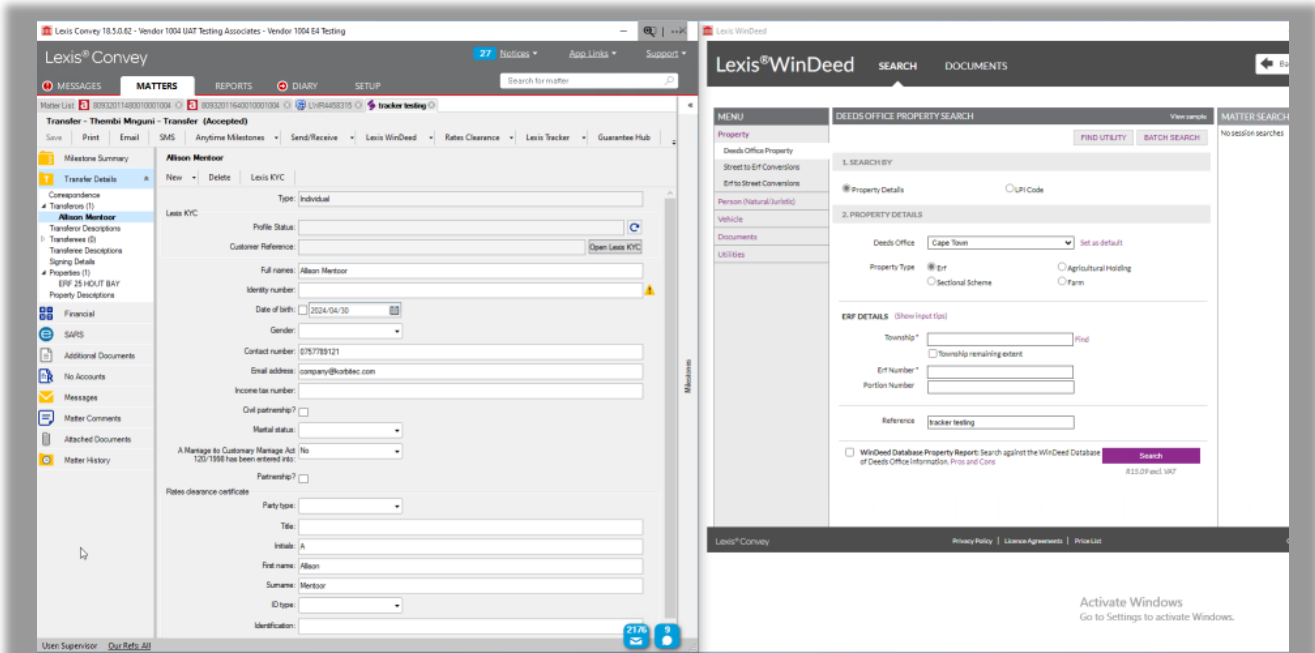
The user can now work on the Lexis Convey application and the Lexis RatesClearance popup window at the same time.



## Lexis WinDeed

The Lexis WinDeed popup window has been enhanced.

The user can now work on Lexis Convey application and the Lexis WinDeed popup window at the same time.



# Standard Bank Limited: Access Bond Facility

Initial Bond Instruction (27) message updated

The Initial Bond Instruction (27) message has been updated for Standard Bank Limited.

The **access bond facility** field has been added to the Initial Bond Instruction (27).

The **access bond facility** field will have only one of the following options:

- **LIMIT**
- **LINK1**
- **LINK2**

The **access bond facility** field will be displayed in the new **Access Bond Facility (185)** milestone.

The screenshot shows the LexisConvey interface with a message open. A red arrow points to the 'access bond facility' field in the message details, which is set to 'LINK1'. The interface includes a navigation menu on the left, a top bar with 'MESSAGES' and other tabs, and a main content area displaying the message details and property information.

State	Type	To	From	Subject	File Reference	Sent/Received
<b>State: Failed Inbox (15 items)</b>						
<b>State: Inbox (7 items)</b>						
		Tony Release Attorneys	Standard Bank LAW Bonds	Bond: Initial bond instruction (27)		2024/05/14 14:52:35
		Tony Release Attorneys	Standard Bank LAW Bonds	Bond: Initial bond instruction (27)		2024/05/14 13:59:08
		Tony Release Attorneys	WebConvey Nedbank Bonds	Bond: Initial Instruction	207024113600100010004/20141022	2023/09/05 11:27:25

**Initial bond instruction (27)**  
From: Standard Bank LAW Bonds  
Recipient: Tony Release Attorneys  
Matter reference: 433874701100100010004

incom amount:	45335.00
hmcu insvy:	N
hmcu rehab date:	1900-01-01
bank account number:	0
staff acc:	N
gender:	MALE
ethnic grp:	WHITE
total expense amount:	33779.00
mesag formt number:	27
registration number:	3840933
account name:	COMBO PROPERTIES TRUST
bond q:	1
property use:	PRIMARY - MAIN RESIDENCE
frstm home buyr:	N
access bond facility:	LINK1
captl subsy amount:	0.00
cmpny trust name:	COMBO PROPERTIES TRUST
subsy amount:	0.00

**property details**

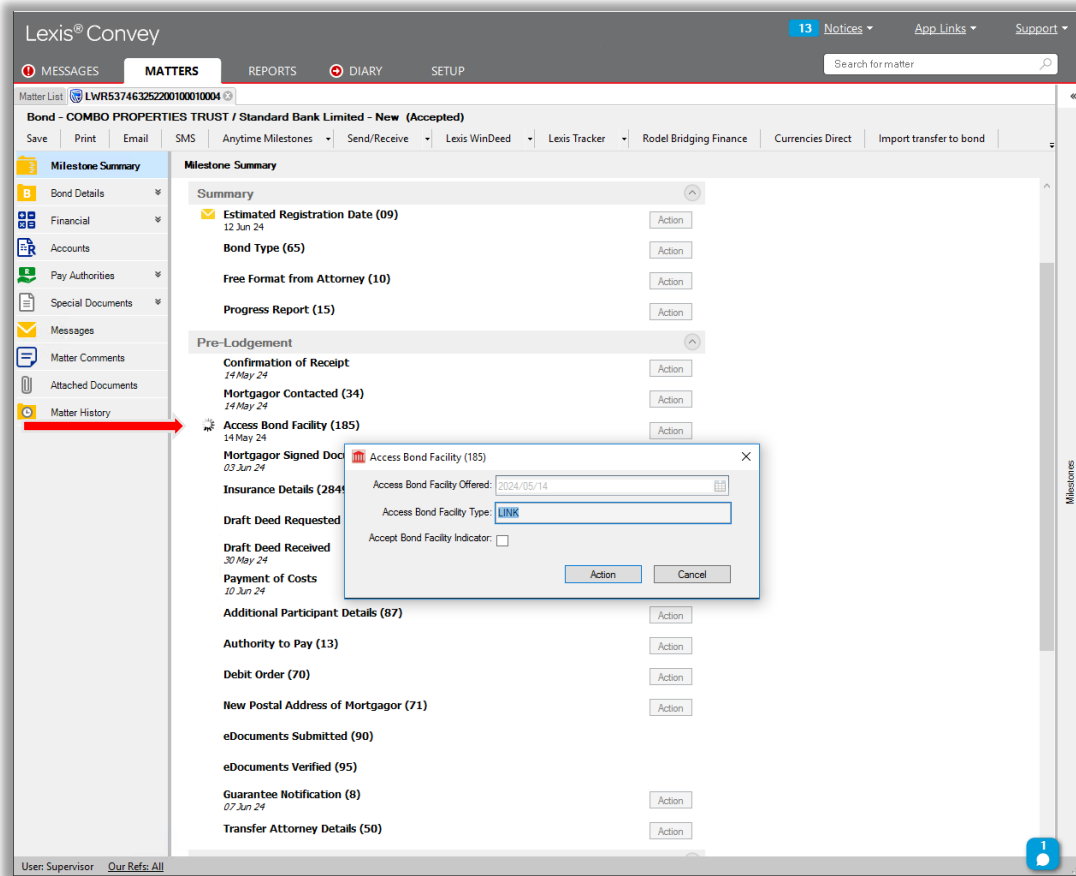
property number:	1
erf number:	3029973
asesr centr number:	50
property description:	ERF 198 THE ISLANDS ESTATE MADIBENG
property type:	VACANT LAND
freeorlease:	FREEHOLD
retention amount:	0.00
purchase amount:	3800000.00
purchase date:	2021-05-20
property area q:	1780
property measure:	SQM
bonded to:	NOT FOUND
property:	N
address line1:	NOT FOUND

## Standard Bank Limited: New Access Bond Facility (185) Milestone

The following new milestone has been added for Standard Bank Limited Bonds.

- **Access Bond Facility (185)**

The MT185 is a message from the Attorney to the Bank notifying the bank that the Mortgagor has accepted the Access Bond Facility.



The **Access Bond Facility (185)** milestone will have the following fields:

- **Access Bond Facility Offered**
- **Access Bond Facility Type**
- **Access Bond Facility Indicator**

Clicking the **Access Bond Facility Indicator** checkbox will accept the bank facility.

## Standard Bank Limited: Access Bond Facility Documents

The Access Bond Facility function will display one of the following documents in the Printlist depending on the **Access Bond Facility Type** field:

- **Access Bond Limit Facility**
- **Access Bond Link Facility**