

# Oracle Insurance Agent Desktop Administration Module User Guide

Version 8.0

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# **Administration Module**

The Administration module allows the creation and management of Agent Desktop's users. It provides a complete set of information regarding each user such as personal information, application's settings and information privileges.

## Roles

Agent Desktop Administration Module has two different administrative roles which handle different types of application's users:

- Super User Administration Role to manage Administration Users.
- User Administrator Role to manage Applications Users.

The **Super User Administration Role** is associated to a unique account that manages all the Administrator accounts. The login name and the password for this account are defined on the **idt-struts-config.xml** file (Idapadmin, Idapadminpassword parameters) of the Agent Desktop's distribution. The **Super User Administration** account can create, retrieve, update and delete **administration accounts**.

The **User Administrator Role** is responsible for managing **user accounts**. An account using this role can create, retrieve, update and delete user's accounts. Unlike the Super User Administration account the administrator accounts are not defined in any file, they are created using the **Super Admin** account.

## Actions

The Agent Desktop Administration module includes an Action menu with 2 actions as quick links to logout from Agent Desktop and sends emails as well.

Action Tools	Users	<u>Help</u>
Send Email		
Logout		

The **Logout** option finishes the current admin user session and exits Agent Desktop. The **Send Email** option allows quick access to the default email program to send emails (i.e. MS Outlook).

## Tools

The Administrator module comes with the same options as the Agent Module; these are the **Preferences** and **My Profile** screens.

<u>Tools</u>	Users	<u>Help</u>	
Prefer	ences		
My Pro	ofile		

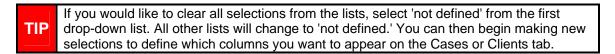
These functionalities are explained below.

#### Preferences

The Preferences screen can be accessed by the **Tools** menu clicking the **Preferences** option.

In the **Preferences** screen you can define which columns are going to be displayed on the **Users** tab. You can also establish the order for those columns.

In the 'User list column sequence' fields, you will find drop-down lists that represent columns on the User tab. Each drop-down list provides a complete listing of all available columns for the User tab. Beginning with the first drop-down list, you will start defining which columns appear from left to right.



To return the lists to the default setting, click 'Set to Default.'

#### To set your viewing preferences:

1. From the Tools dialog, select Preferences.

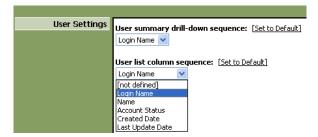
[3] [Agent Desktop] - Preferences - Microsoft Internet Explorer	
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🔾 Back 🔹 🔘 👘 📓 🏠 🔎 Search 🦅 Favorites 🤣 🔗 🕞 💽	J 🛍
Address a https://localhost/agent/IDX_PREFERENCES.do?ONAPPINIT=Y	💌 🔁 Go 🛛 Links 🍟
My Agency Agent Desktop	Administrator   Preferences
Action Tools Users Help	
User Settings taer summary dril-down sequence: [Set to Default] toop have Name Access Seators Ceded Date Lest Ljoder Date Terms per Page: S V	
Super Admin: adadmin	② 2003-2006 Skywire Software. All rights reserved
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The Preferences screen appears with the User Settings tab displayed.

2. In the User summary drill-down sequence area of the screen, define the viewing order for Login Name.

These selections define how data will be displayed on the User Summary tab.

3. In the **User list column sequence**, select which columns you would like displayed on the **Users** tab. The order of your selections also determines the order of data columns on the Users tab. The top selection will appear on the left side of the screen, followed by the other selections in descending order.



4. From the **Items per Page** list, select **5**, **10**, **15**, or **20** as the number of records to display on the Cases tab.

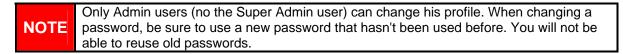


5. Click Update.

Agent Desktop updates which columns display on the Cases tab per your selections.

#### **My Profile**

In the event that you would like to change your admin profile information, you can easily access the **My Profile** screen from within Agent Desktop.



#### To modify your profile:

1. From the **Tools** dialog, select **User Profile**.

The User Profile appears.

Y		
🙆 [Agent Desktop] - Use	r Setup - Microsoft Internet Exp	plorer 📃 🗖 🔀
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Address 🛃 https://localhost/-	agent/GAUSER_DETAILS.do?ANOTHER	JSER=Y&REDIRECT_TO_QUEUE_URL=idx_users.jsp&REDIRECT_TO_QUEUE_ATTRS=% 🔽 🔁 Go 🛛 Links 🤰
My Agency	y Agent Deskto	pp Administrator   Users
<u>Action Tools</u> Users	<u>Help</u>	User Summary Users User Details Users with Follow-ups
Add to selected		Please use at least 6 characters and a combination of letters and numbers.
USER: admtest	* New Password:	
Created: 10/10/2008	* Confirm New Password:	
Last Update: 10/10/2008		tote: Do not include your password in a hint!
Personal Info	Password Hint:	abc+3three3
Follow-up(s)	Agency Name:	ADMTEST
T010W 0p(3)	* First Name:	
Rename Account	Middle Name:	
	* Last Name:	Cole
PRINT DETAILS	* Address:	134
	* City:	Beverly Hills
	* State:	CA 💌
	* Zip Code:	90210 - [Set City/State for the Zip Code] [Reset Address]
	* Email address:	test@testadmin.com Send Email
	* Contact Phone: (	880 ) 646 - 4646 Ext:
	Account Activation:	
	Reason if Inactive/Declined:	×
		UPDATE DELETE
Super Admin: adadmin		© 2003-2006 Skywire Software. All rights reserved
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- 2. On the **Personal Info** screen, you can make these changes:
  - Type a new password in the password fields.
  - Change your name and address information.
  - Type a new email address or phone number.
- 3. After making any changes in these fields, click **Update**.

The Agent Desktop system updates your profile with the data you've just entered.

Microso	ft Internet Explorer  🛛
♪	Profile updated !
	ОК

## Users

The Administrator module comes with the same options as the Agent Module; these are the **Preferences** There are several users functionalities that administrators can access. All of these functionalities are available from the Users menu.

Users <u>Help</u>	
New User	
Re-Open Viewed User	~~
Summary	
Users	
Users with Follow-ups	
New Search	
Open Search Criteria	~
Remove Search Criteria	>>
Reports	*

These functionalities are explained below.

#### **New User**

In order to create new users follow the next steps:

1. From the Users dialog, select New User

Elle       Edk       Yew       Favorites       Iools       Help         Image: Second Sec
Agui ess 🛃 https://iocailost/agent/GAOSER_DETAILS.do/ACTIONCODE=NEWOSER
My Agency Agent Desktop Administrator   Users
Action Tools Users Help User Summary Users User Details Users with Follow-ups
USER: [NEW] Please use at least 6 (up to 10) characters and a combination of letters and/or numbers that starts with a letter. Created: * Personal Login Name: Last Undate:
Please use at least 6 characters and a combination of letters and numbers.  Please use at least 6 characters and a combination of letters and numbers.  Please use at least 6 characters and a combination of letters and numbers.  Please use at least 6 characters and a combination of letters and numbers.
Follow-up(s) Password Hint: Password Hint:
Rename Account
Agency Name:
* First Name: Middle Name:
* Last Name:
* Address:
* Cty:
* State: Select a State 🗸
* Zip Code: 5 - 5 Set City/State for the Zip Code] [Reset Address]
* Email address: Send Email
* Contact Phone: ( ) Ext:
Account Activation:
Reason if Inactive/Declined:
RESET SAVE
Super Admin: adadmin © 2003-2006 Skywire Software. All rights reserved
Social intranet

The New User screen appears with the **Personal Info** tab displayed.

2. Type all the information required such as Personal Login Name, Password, Password Hint, etc.

3. Mark the 'Account Activation' field to active the account.

🗿 [Agent Desktop] - User :	Setup - Microsoft Internet Expl	orer EDX
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Address 🍓 https://localhost/ag	ent/GAUSER_DETAILS.do?ACTIONCOD	DE=NEWUSER 🔽 🔂 Go Links 🍟
My Agency	Agent Deskto	p Administrator   Users
Action Tools Users	Help	User Summary Users User Details Users with Follow-ups
USER: [NEW] Created: Last Update:	* Personal Login Name:	Please use at least 6 (up to 10) characters and a combination of fetters and/or numbers that starts with a letter. adadmin Dease use at least 6 characters and a combination of letters and numbers.
Personal Info Follow-up(s)	* Password: Password Hint:	Note: Do not include your password in a hint!
Rename Account	Agency Name: * First Name:	
		Administrator Some address
	* State: * Zip Code:	
	* Contact Phone: ( Account Activation:	802 ) 446 - 6797 Ext:
	Reason if Inactive/Declined:	RTSET SAVE
Super Admin: adadmin		🚯 2000-2006 Skywire Software. All rights reserved 🥃 🚔 😂 Local intrant

4. Click the Save.

#### **Re-Open Viewed User**

Agent Desktop allows administrators store the last users that they have reviewed. To access the list with the last users reviewed go to **Users** menu and click **Re-Open Viewed Users** option.

Users Help	User Summary Users Use
New User	
New User By RefNo	
	rstevens Richard Stevens
Summary	marmstrong Michael Armstrong pbutters Phillip Butters
Users	rstevens Richard Stevens
Users with Follow-ups	jcain John P Cain
New Search	wroberts William Roberts agale Richard Gale
0	gsmith George Smith
Account Agency Name: A	cvalentine Carl Valentine

The list of the last users reviewed is shown. To view user information click the desired user on the list.

#### **User Summary**

The User Summary tab provides a summary view of users. In this screen you will find the number of users grouped by **Login Name** that have Active/Inactive accounts.

SAVE         Certifie Search Options         SAVE           ogin Name:         By Login Name [Print Summary]         Accounts         Active           inst Name:         B         22         22           ast Name:         B         2         1           c         6         3         2           inst Name:         B         2         1           c         6         3         2           inst Name:         B         2         1           c         6         3         2           inal:         F         5         4           ingency Name:         I         1         1           iccount Status:         M         7         7           Select Status:         N         8         8         8	Administrator     Carrier Acce     Carrier Acce	Users
My Agency     Agent Desktop       tim Tools     User     Help     User Summary       tim Tools     User     Help       variable     State     Reference       gin Name:     A     22     22       rst Name:     B     2     1       st Name:     D     10     9       st Name:     B     2     1       op Name:     B     2     1       st Name:     D     10     9       st Name:     S     4     2       st Name:     S     4     2       st Name:     D     10     9       st Name:     S     4     2       st Name:     S     4     2 <th>Administrator</th> <th>Users</th>	Administrator	Users
inn Tools     User     Help     User Summary     User       arch Options     SAVE     ★     setide Search Options]     B       gin Name:     B     2     1       sk Name:     B     2     2       sk Name:     B     2     1       sk Name:     B     2     1       sk Name:     B     1     1       sk Name:     B     2     2       sk Name:     B     2     2       set Kane:     B     1     1       set Kane:     B     2     2       set Kane:     B     2     2       set Kane:     B     2     2	Users Vuser Details Vusers with Folk Inactive Carrier Acce Requested I 0 0 1 0 2 0 1 0 0 0	low-ups
Arch Options         SAVE         testide Sauch Options]           gin Name:         By Login Name [Print Summary]         Accounts         Active           st Name:         ■ A         22         22           st Name:         ■ A         22         22           st Name:         ■ A         22         22           st Name:         ■ B         2         1           c         6         3         0           gin Name [Print Summary]         0         1         0           st Name:         ■ B         2         1           c         6         3         0         1           c         10         9         0         0         0           ency Name:         ■ B         1         1         1           ccourt Status:         ■ M         2         2         2           etect Status         ■ B         2         2         2	Inactive         Carrier Acce Requested I           0         0           1         0           2         0           1         0           0         0           0         0	255
in Name: it Name: t Name: A A (tive) By Login Name [Prrt Summary] A A (tive) By Login Name [Prrt Summary] By Login Nam	Requested I           0         0           1         0           2         0           1         0           0         0           0         0	
gn Name:         By Login Name [Pire Summary]         Accounts         Active           st Name: <ul> <li>A</li> <li>B</li> <li>C</li> <lic< li=""> <li>C</li></lic<></ul>	Requested I           0         0           1         0           2         0           1         0           0         0           0         0	
A         22         22           st Name:         A         2         1           at Name:         B         2         1           b         C         6         3           at:         D         D         D         2           at:         C         3         3         3           e         C         8         7         4           e         S         4         1         1           ency Name:         I         1         1         1           ency Name:         I         1         1         1           ency Name:         I         N         1         1           ency Name:         I         I         1         1           ency Status:         I         N         2         2	Requested I           0         0           1         0           2         0           1         0           0         0           0         0	
shame:     B     2     1       shame:     C     6     2       shame:     D     100     2       E     3     3       ali:     F     5     4       G     3     14     13       ency Name:     1     1       unit Status:     M     2     2       elect Status     N     8     8	1 0 3 0 1 0 0 0	
BB     2     1       Name:     C     6     3       P     0     10     2       al:     F     3     3       and     F     5     4       and     F     3     3       and     F     3     3       and     F     1     1       and     F     1   <	<u>3</u> 0 <u>1</u> 0 000	
Name:         D         10         9           E         3         3           ali:         F         5         4           oncy Name:         G         8         7           ound Status:         H         1         1           wet Status         N         2         2           No         8         8	1 0 0 0	
D         2         2           al:         E         S         2           al:         F         S         4           G         8         Z           incy Name:         J         14         13           vick Nature:         L         2         2           ount Status:         M         Z         2           N         S         8         8	0 0	
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ncy Name: ■ K 1 1 w K 1 1 ↓ 2 2 ↓ 2 2 ↓ 2 2 ↓ 2 2 ↓ 3 ↓ 4 13 ↓ 1 ↓ 1 ↓ 1 ↓ 4 ↓ 1 ↓ 4 ↓ 1 ↓ 4 ↓ 1 ↓ 4 ↓ 1 ↓ 4 ↓ 4 ↓ 4 ↓ 4 ↓ 4 ↓ 4 ↓ 4 ↓ 4	1 0	
K         1         1           L         2         2           rounk Status:         M         Z         Z           iect Status         M         8         8	1 0	
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lect Status N B B	0 0	
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R     12     11     tUpdate Date     S     2     2	0 0	
RESET SEARCH T 16 15	1 0	
	1 0	
• w 3 3	0 0	
• Y 1 1	0 0	

Each **Login Name** group in the list has a corresponding number of accounts related in the **Accounts** column. When you select an accounts total, you access a list of users for the selected category.

#### Search Options tool

You can use the Search Options tool on the left side of the screen to narrow the scope of data you see on the User Summary screen. For instance, if you only want to view case totals for the users with Last Name Smith, then you type "Smith" on the "Last Name" field and click "Search." The results appear on the main portion of the screen.

#### Users

The Users tab displays a list of cases as accessed from the Case Summary tab. For example, if you clicked "10" next to "A" Login Name group on the User Summary tab, then the Users tab would display the ten cases that are associated with "A" Login Name group.

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dress 🛃 https://localhost/agent/G/	USERS.do					💌 🔁 Go 🛛 Lir
My Agency	Agent I	Desktop			Admin	istrator   Users
tion <u>Tools</u> Users <u>He</u>	£			User Summary	lsers <u>User Details</u>	Users with Follow-up
earch Options SAVE		wch Options] ITEMS	FOUND: S Items per Page	e: 5 💙 Page 1 of		
gin Name:	User Ho	t Login Name »	Name	Account Status	Created Date	Last Update Date
	1		Ariel Amstrong	Active	09/30/2008	09/30/2008
st Name:	2	ablack	Anthony Black	Active	09/30/2000	09/30/2000
st Name:	2		AD Administrator	Active	09/30/2008	09/30/2008
	- 1		Angel Parker	Active	07/23/2007	05/30/2008
nal:	5	avillans	Alfred Williams	Active	08/20/2008	10/01/2008
count Status:	-1 1					
elect Status	~					
eated Date	_					
st Update Date						
RESET SEARCH						

The Users tab screen offers several options for working with users data. You can do the following from this screen:

- Sort data as desired. You can set sorting order either directly from this screen or from the Preferences screen.
- Generate reports. You can use commands from the Users menu or the "Reports" drop-down list to generate the Users Report.
- Access the User Details tab. To do so, click the number in the "User" column next to any user listing. The User Details screen contains Personal Info, Agency Data Access, Follow-up(s) and Rename Account tabs for a particular user.

#### **Update User Information**

In order to update user account information you have to follow these steps:

- 1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.
- 2. Click Search.



3. Click either the Login Name or the User number of the desire user.

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My Agency	Agent Desktop		Administrator   Users
Action Tools Users H	Help	User Summ	ary Users User Details Users with Follow-ups
Add to selected		Please use at least 6 characters and a combination of letters and nur	abers.
USER: ksnith	* New Password:		
Created: 03/15/2007	* Confirm New Password:		
Last Update: 10/14/2008		Note: Do not include your password in a hint!	
Personal Info	Password Hint:	mysecretcode	
Agency Data Access	Agency Name:		
Follow-up(s)	* First Name:	Kate	
	Middle Name:	5	
Rename Account	* Last Name:	Smith	
PRINT DETAILS		535 New Rd., Bidg C Ste. 2	
		Parsippany	
	* State:	Select a State 💌	
		07054 - [Set City/State for the Zp Code] [Reset Ad	fress]
			Send Email
	* Contact Phone:		
	Account Activation:		
	Reason if Inactive/Declined:	A	
		UPDATE DELETE	
Admin: adadmin			© 2003-2006 Skywire Software. All rights reserved
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The User Details screen appears with the Personal Info tab of the selected user displayed.

- 4. On the **Personal Info** screen, you can make these changes:
  - Type a new password in the password fields.
  - Change your name and address information.
  - Type a new email address or phone number.
  - Change the Account status (Active/Inactive)
- 5. After making any changes in these fields, click Update.

The Agent Desktop system updates your profile with the data you've just entered.

Microsoft Internet Explorer								
♪	Profile updated !							
	ок							

#### Activate/Inactivate an Account

In the event that you would like to activate/inactive a user account, you can easily do it by following the next steps:

- 1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.
- 2. Click Search.
- 3. Click either the Login Name or the User number of the desire user.

The User Details screen appears with the Personal Info tab of the selected user displayed.

4. Check or uncheck the **Account Activation** checkbox whether you want to active or inactivate the user account respectively.

Note: If you want to inactivate a user account you have to add a reason in the **Reason if Inactive/Declined** textbox.

Agent Desktop] - User Se	tup - Microsoft Internet Explor	er			
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(3 Back - (2) - 💌	Search 🔶 Faure	tes 🕢 🔗 😓 🕞 🛄			
Agdress 1 https://localhost/agen	k/GAUSER_DETAIL5.do?ANOTHERUSER	-Y&REDIRECT_TO_QUEUE_URL=idx_users.jsp&REDIR	ECT_TO_QUEUE_ATTRS=%3	FITEMIDENT%3Daabramov% 🞽 📄	Go Links <sup>30</sup>
My Agency	Agent Desktop			Administrator	Users
Action Tools Users	Help		User Summary Users	User Details Users with I	ollow-ups
Add to selected		Please use at least 6 characters and a combination of	letters and numbers.		
USER: ksmith	* New Password:				
Created: 03/15/2007	* Confirm New Password:				
Last Update: 10/14/2008		Note: Do not include your password in a hint!			
Personal Info	Password Hint:	mysecretcode			
Agency Data Access	Agency Name:				
Follow-up(s)	* First Nome:	Kate			
	Middle Name:	5			
Rename Account	* Last Name:	Smith			
PRINT DETAILS	* Address:	535 New Rd., Bidg C Ste. 2			
PRINT DETAILS	* City:	Parsippany			
	* State:	Select a State 💌			
	* Zip Code:	07054 - [Set City/State for the Zp Co	ode] [Reset Address]		
	* Email address:	ksmith@quickinsurance.com	Send Email		
	* Contact Phone:	( 973 ) 549 - 1893 Ext:			
	Account Activation:		_		
	Reason if Inactive/Declined:		4 >		
		UPDATE DELETE			
Admin: adadmin			© 2003-	2006 Skywire Software. All righ	ts reserved 🐷
8				🔒 🧐 Local int	ranet

5. Click Update

#### **Unlock an Account**

In the event that you would like to unlock a user account, you can easily do it following the next steps:

- 1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.
- 2. Click Search.
- 3. Click either the Login Name or the User number of the desire user.

The **User Details** screen appears with the Personal Info tab of the selected user displayed.

#### 4. Click Unlock Account

[Agent Desktop] - User Set	up - Microsoft Internet Explore	et.			
Ele Edit Yew Favorites In	ools Help				1
🌀 Back - 🐑 · 💌 🙎	👔 🏠 🔎 Search 🤺 Favori	🔤 🚱 🍰 🝓 🗔 🗾 🏭			
Address (2) https://localhost/agent	GAUSER_DETAILS.do?ANOTHERUSER	-Y&REDIRECT_TO_QUEUE_URL=idx_users.jsp&REDIRECT_TO	QUEUE_ATTRS=%3P	ITEMIDENT%3Daabramov% 🛩 🔁	Go Links
My Agency	Agent Desktop			Administrator	Users
Action Tools Users H	telp	User 5	Summary Users	User Details Users with F	ollow-ups
Add to selected		Please use at least 6 characters and a combination of letters a	and numbers.		
USER: ksmith	* New Password:				
Created: 03/15/2007	* Confirm New Password:				I
Last Update: 10/14/2008		Note: Do not include your password in a hint! mysecret.code			
Personal Info	Password Hint:	mysecretcode			
Agency Data Access	Agency Name:				- 1
Follow-up(s)	* First Name:	Kate			I
	Middle Name:	5			
Rename Account	* Last Name:	Smith			I
PRINT DETAILS		S35 New Rd., Bidg C Ste. 2			
PROTIDETRICS	* City:	Parsippany			
	* State:	Select a State 💌			- 1
	* Zip Code:	07054 - [Set.City/State for the Zp.Code] [Re	iset Address]		
		ksmith@quickinsurance.com	Send Email		
	* Contact Phone:	( 973 ) 549 - 1893 Ext:			
	Account Activation:				
	Reason if Inactive/Declined:		A		- 1
		UPDATE DELETE UNLOCK ACCOUNT			- 1
Admin: adadmin			© 2003-	2006 Skywire Software. All right	
9				🔒 🍤 Local intr	anet

#### **Remove an Active Session**

In the event that you would like to remove a user active session, you can easily remove it by following the next steps:

- 1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.
- 2. Click Search.
- 3. Click either the Login Name or the User number of the desire user.

The User Details screen appears with the Personal Info tab of the selected user displayed.

4. Click Remove Active User Session.

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🌀 Back + 🕥 · 🖹 🙎	🕽 🐔 🔎 Search 🤺 Favor	kes 🔣 😥 - 📚 👧 📼 🛄 📖
Agdress 🛃 https://localhost/agent	/GAUSER_DETAILS.do?ANOTHERUSER	x=Y6REDIRECT_TO_QUEUE_URL=idx_users.jsp6REDIRECT_TO_QUEUE_ATTRS=%3FITEMIDENT%3Daabramov% 🛩 🔁 Go 🛛 Links 🍟
My Agency	Agent Desktop	Administrator   Users
Action Tools Users H	telp	User Summary Users User Details Users with Follow-ups
Add to selected		Please use at least 6 characters and a combination of letters and numbers.
USER: Ismith	* New Password:	
Created: 03/15/2007	* Confirm New Password:	
Last Update: 10/14/2008		Note: Do not include your password in a hint!
Personal Info	Password Hint:	mysecretcode
Agency Data Access	Agency Name:	
Follow-up(s)	* First Name:	Kate
	Middle Name:	5
Rename Account	* Last Name:	Smith
PRINT DETAILS		S35 New Rd., Bldg C Ste. 2
		Parsippany
		Select a State 😪
	* Zip Code:	
		ksmith@quickinsurance.com Send Email
		( 973 ) 549 - 1893 Ext:
	Account Activation:	
	Reason if Inactive/Declined:	
		UPDATE DELETE REMOVE ACTIVE USER SETSION
Admin: adadmin		© 2003-2006 Skywire Software. All rights reserved 🧓
8		🔒 🧐 Local intranet

5. Confirm the Session Removal

Microso	ft Internet Explorer 🛛 🛛 🗙
2	Please confirm current Session removal for the user [ksmith].
	OK Cancel

#### Users (Search)

In the left side of the Users Summary and Users tab screens you will find a Search Options panel.

Search Options	SAVE	ŧ
Login Name:		
First Name:		
Last Name:		
Email:		
Account Status:		_
Select Status		*
Created Date [Reset]		
After (MM/DD/YY):	_	_
		> -
Before (MM/DD/YY):	_	_
		> -
Last Update Date		
RESET		

You can use the following fields to define your search criteria:

- Login Name: Type the login name of the user or a portion of the login name.
- First Name or Last Name: You can search for a user by just using the first name or the last name of the user.
- Email: If you know the email of the user type it here.
- Agency Name: Type the name of the agency or a portion of the name.
- Account Status: This drop-down list allows you to select user statuses for search criteria. If you would like to clear your selection for this list, just select the "Select Status" item on the list.
- Created Date: Enter a date range in the "After" and "Before" fields to define the date range of your search. To conduct a search of all users created in March, for example, enter 'March 1' in the After field and 'March 31' in the Before field. Please note that these searches INCLUDE the dates you enter in these fields.
- Last Update Date: Enter a date range in the "After" and "Before" fields to define the date range of your search. To conduct a search of all users that have been updated in March, for example, enter 'March 1' in the After field and 'March 31' in the Before field. Please note that these searches INCLUDE the dates you enter in these fields.

#### **Users with Follow-Ups**

The Users with Follow-Ups tab screen provides a list of users that have follow-ups.

🚱 Back 🔹 🐑 🐇 🚺	2 🎧	<sup>₽</sup> s	iearch	Tav Fav	orites 🚱	18	- 🦾 🔚	2			
ddress 🕘 https://localhost/ager	x/GAUSER	S.do									💌 🔁 Go 🛛 Lini
My Agency	Aç	jent	De	eskto	р					Admin	istrator   Users
ction Tools Users	<u>Help</u>							User Su	mmary Us	ers <u>User Details</u>	Users with Follow-up
Search Options 5/	WE ++	<chide (<="" th=""><th>Search</th><th>Options]</th><th>ITEMS FOUN</th><th>D: 5</th><th>Items per Page</th><th>: 5 💌</th><th>Page 1 of 1</th><th></th><th></th></chide>	Search	Options]	ITEMS FOUN	D: 5	Items per Page	: 5 💌	Page 1 of 1		
Quick Follow-up Search:	_	User I	Hot List	ogin Nam	<u>e »</u>	Name		Account	t Status	Created Date	Last Update Date
Pick an option SEARCH	×			zparker		Gwend	lolyne Parker	Active		09/30/2008	09/30/2008
SEARCH		2		strker		Paul St	riker	Active		09/30/2008	09/30/2008
Follow-up Search by Criteria:		2		michaels		John M	tichaels	Active		09/30/2008	09/30/2008
Status:		4		<u>klack</u>		Hans B	lack	Active		07/23/2007	05/30/2008
Al	~	5		ismith		Kate S	nith	Active		08/20/2008	10/01/2008
Due Date From (MM/DD/YY):	-										
	- <b>(</b>										
Due Date To (MM/DD/YY):											
Closed From (MM/DD/YY):											
	-0										
Closed To (MM/DD/YY):	_										

Users details on the list can be accessed by clicking either in the **User** number or the **Login Name** columns.

#### **Search Criterias**

Agent Desktop offers you the opportunity to save your most frequently used search queries. Rather than type in the same search criteria day after day, you can instead save the criteria and access it with one click of the mouse. You can save up to 10 search queries and delete them at any time.

To save user search criteria:

1. In the Search Options tool on the left side of the screen, select search criteria.

Search Options	AVE	ŧ
Login Name:		
First Name:		
Last Name:		
Smith		
Email:		
Account Status:		
Inactive		~
Created Date [Reset]		
After (MM/DD/YY):		
01/01/2007		-
Before (MM/DD/YY):		
01/01/2008		-
Last Update Date		_
RESET	]	

2. Click Search.

The search results appear on the main portion of the screen.

3. In the Search Options tool on the left side of the screen, click **SAVE** at the top.

The Explorer User Prompt dialog appears.

4. Type a short description for the search criteria. You will use this description as a reference point in the future. Your description may not be longer than 40 characters.

Explorer User Prompt	
Script Prompt:	OK
Please enter a short (up to 40 characters) Search Criteria description. Be advised that you cannot store more than 10 criterias at a time.	Cancel
Inactive - 01/01/2007 - 01/01/2008	

5. Click OK.

Your search criteria description now appears on The Users tab under Open Search Criteria.

Users Help				<u>User</u>
New User				
Re-Open Viewed User	~>	TEMS FOUND: 0	Items per Page:	Page 1 of 1
Summary		TEMOTOGIND: 0		
Users		<u>ne »</u>	Name	Account Stati
Users with Follow-ups				
New Search				
Open Search Criteria	»	Inactive - O	1/01/2007 - 01/01/	2008
Remove Search Criteria	~>			
Reports	~~	]		

NOTE

To remove a search criteria description, click the description under "Remove Search Criteria" on the "Users" menu.

Users <u>Help</u>				<u>Use</u>
New User				
Re-Open Viewed User	>>	TEMS FOUND: 0	Items per Page:	Page 1 of 1
Summary				-
Users		<u>ne »</u>	Name	Account Stat
Users with Follow-ups				
New Search				
Open Search Criteria	>>			
Remove Search Criteria	<b>»</b>	Inactive - O	1/01/2007 - 01/01/	2008
Reports	>>			

## Reports

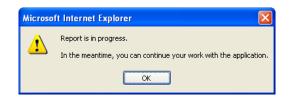
Only Users reports are available for Agent Desktop Administration Module. These reports gather administration user's information for the **Super Admin** user or user's information for **Administrator**.

#### **User Reports**

- 1. Open the desired list of users on which to report on the Users or Users with Follow-ups tabs.
- 2. Go to the **Users** menu and then to the **Reports** option to select **Users Report**.

Users <u>Help</u>		_		Use
New User				
Re-Open Viewed User	*	TEMS FOUND: 5	Items per Page:	
Summary		TEMS FOUND: 3		
Users		<u>ne »</u>	Name	Account Stat
Users with Follow-ups			Ariel Amstrong	Active
New Search			Anthony Black	Active
Open Search Criteria	>>		AD Administrator	Active
Remove Search Criteria	**		Angel Parker	Active
Reports	»	Users Repo		

A message appears notifying that the report is in progress.





Sometimes the number of user to be included in the report is too big that it would take minutes to generate the report. In these cases the next message will appear:

Microsof	ít Internet Explorer 🛛 🛛 🔀
2	This queue is quite large (117 items total). It will take a while to print it out entirely. Do you want to proceed ?
	OK Cancel

#### 3. Click OK.

One of the following two actions can happen, depending upon the configuration of your browser:

A new window opens with the report in .rtf format. You can save and modify the report as desired.

#### OR

The File Download dialog appears.

File Downloa	d 🛛 🔀	
Do you wan	t to open or save this file?	
	Name: idx_users_report.2008_10_16_10_27_32_544.rtf Type: Microsoft Word Document From: localhost	
	<u>Open</u> <u>Save</u> Cancel	
✓ Always ask before opening this type of file		
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>		

Click **Save** to save the report to your computer.

#### The Save As dialog appears.

Select a name and location for this file on your computer and click Save.

The report is saved to your computer. You can now edit its contents as desired or send as an email attachment.



After generating the report, you can email this report, edit its text, insert your company logo in the header, or simply save the report on your computer for future reference.

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