Oracle Insurance Agent Desktop Administration Module User Guide

Version 8.0

October 2008

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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:

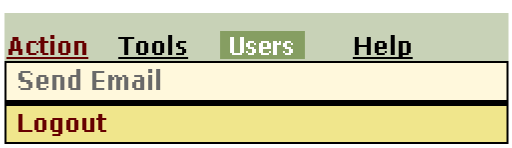
- **Super User Administration Role** – to manage Administration Users.
- **User Administrator Role** – to manage Applications Users.

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 (ldapadmin, ldapadminpassword 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

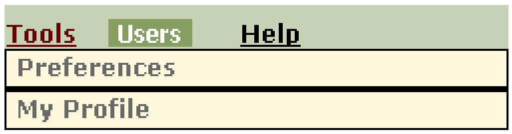
The Agent Desktop Administration module includes an Action menu with 2 actions as quick links to logout from Agent Desktop and sends emails as well.



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.



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.

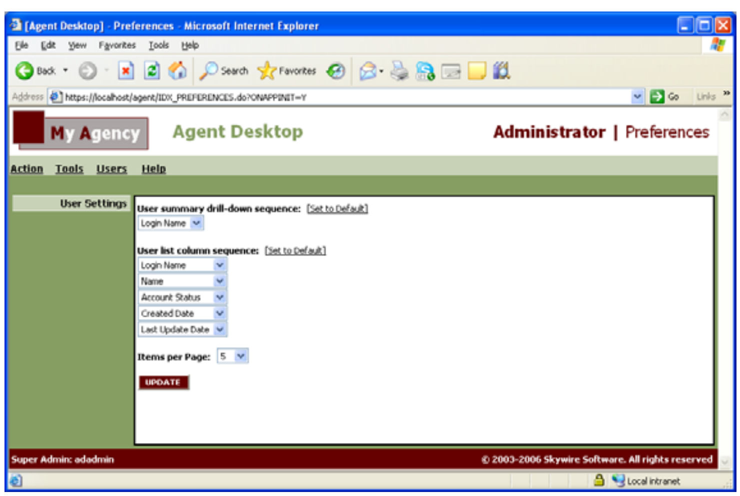
In the 'User list column sequence' fields, you will find drop-down lists that represent columns on the User tab. Each drop-down list provides a complete listing of all available columns for the User tab. Beginning with the first drop-down list, you will start defining which columns appear from left to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

TIP	If you would like to clear all selections from the lists, select 'not defined' from the first drop-down list. All other lists will change to 'not defined.' You can then begin making new selections to define which columns you want to appear on the Cases or Clients tab.

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

To set your viewing preferences:

1. From the Tools dialog, select Preferences.

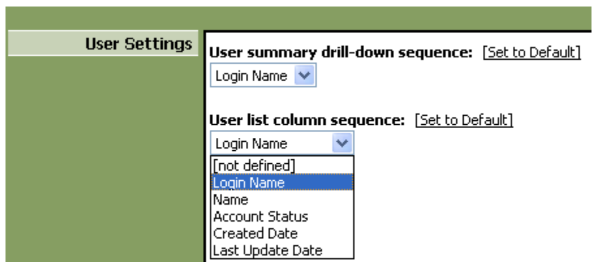


The **Preferences** screen appears with the **User Settings** tab displayed.

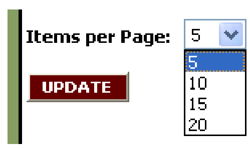
2. In the User summary drill-down sequence area of the screen, define the viewing order for Login Name.

   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

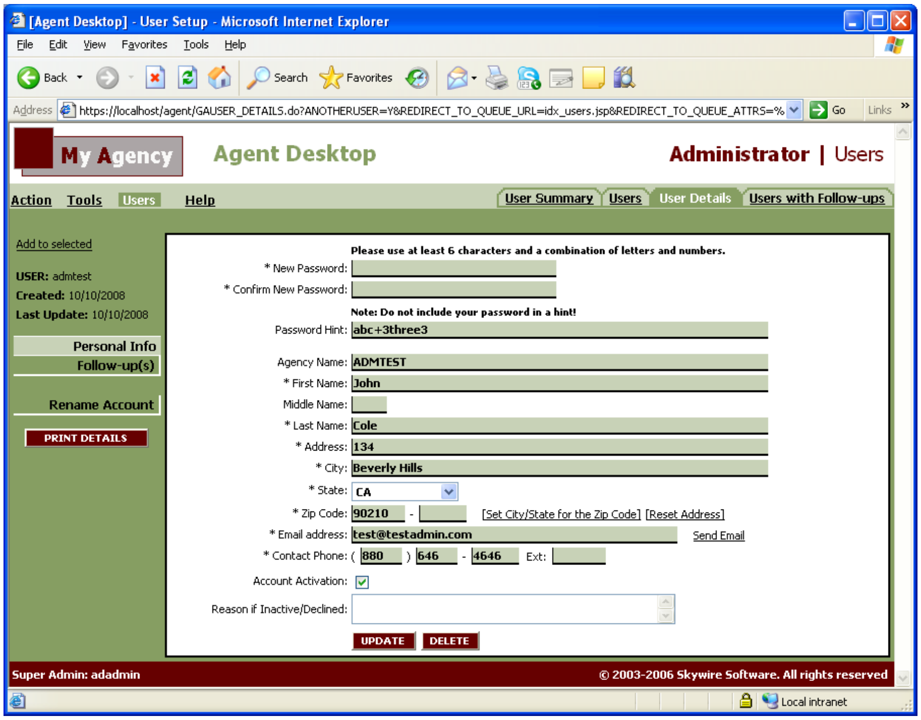
In the event that you would like to change your admin profile information, you can easily access the **My Profile** screen from within Agent Desktop.

NOTE	Only Admin users (no the Super Admin user) can change his profile. When changing a password, be sure to use a new password that hasn't been used before. You will not be able to reuse old passwords.

To modify your profile:

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

   The **User Profile** appears.



2. On the **Personal Info** screen, you can make these changes:

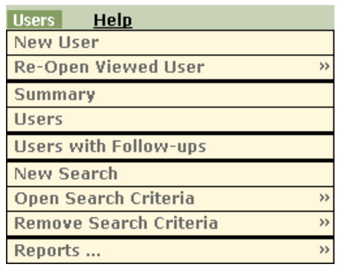
   - Type a new password in the password fields.
   - Change your name and address information.
   - Type a new email address or phone number.

3. After making any changes in these fields, click **Update**.

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

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.

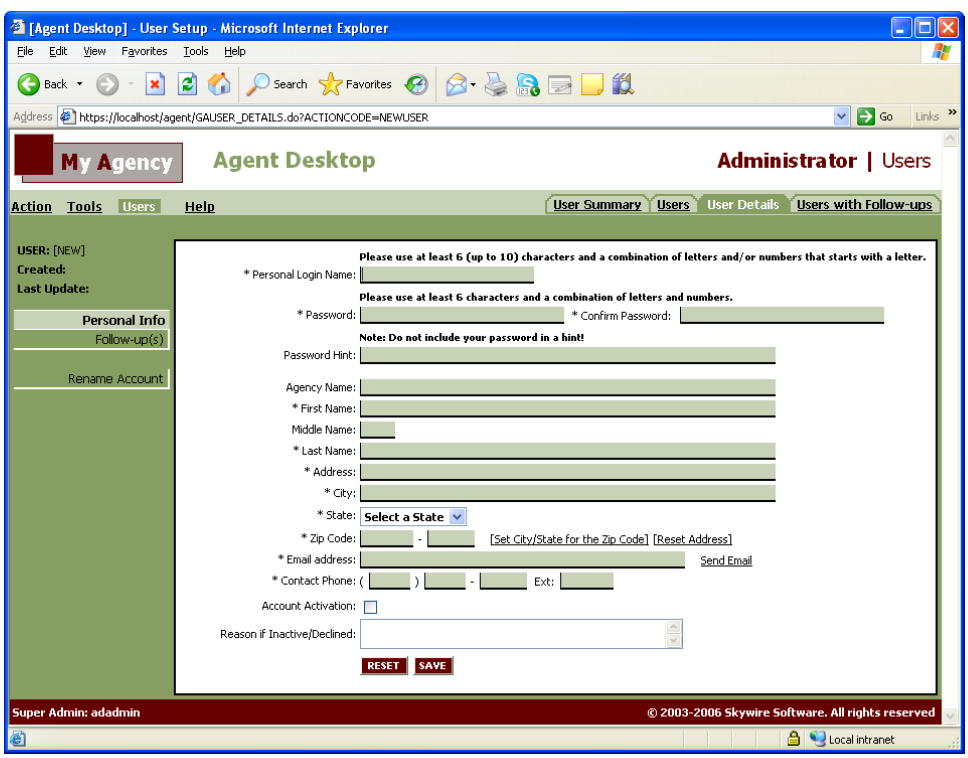


These functionalities are explained below.

New User

In order to create new users follow the next steps:

1. From the **Users** dialog, select **New User**

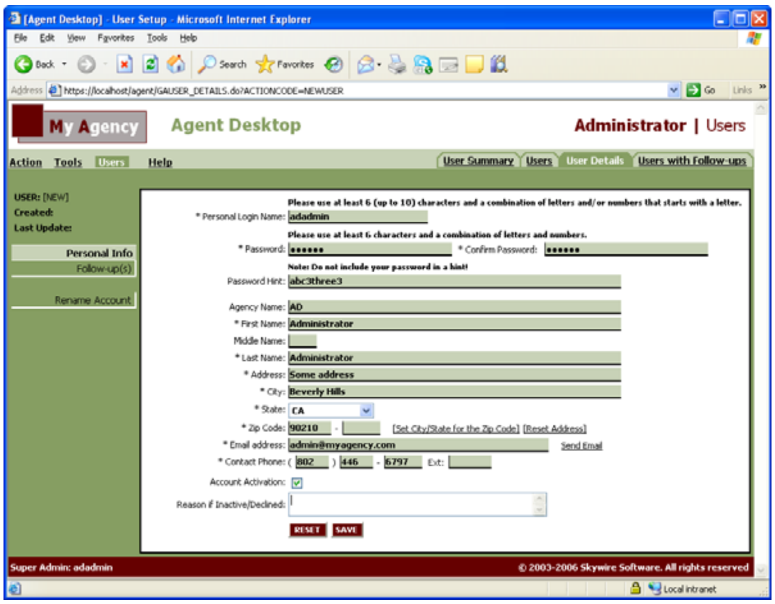


The New User screen appears with the **Personal Info** tab displayed.

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

NOTE	The required fields are marked with an * before the field name.

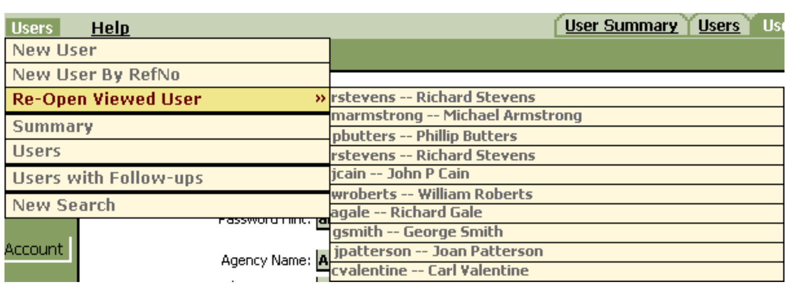
3. Mark the ‘Account Activation’ field to active the account.



4. Click the **Save**.

Re-Open Viewed User

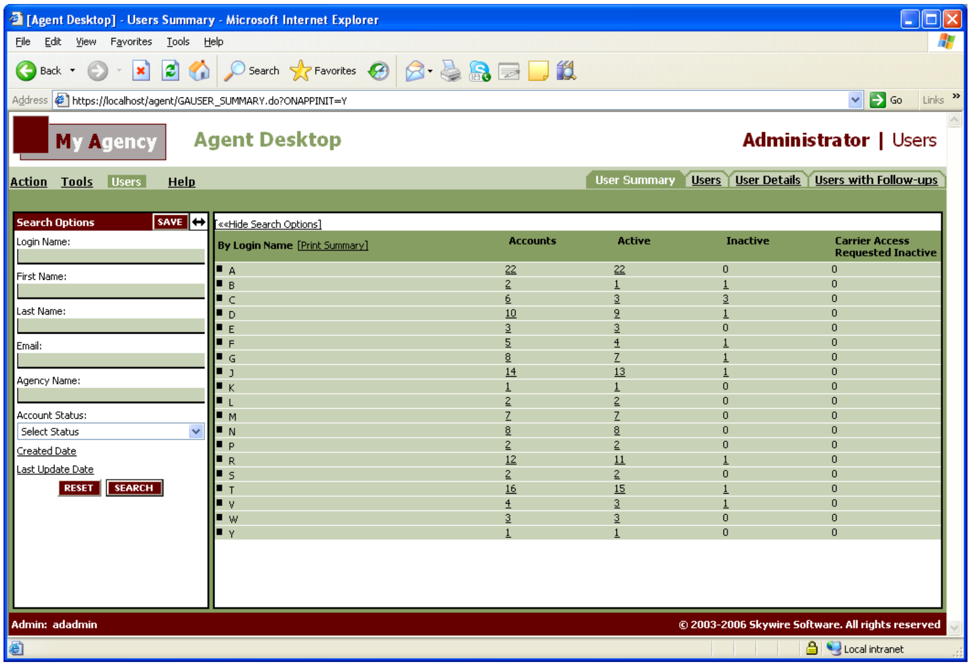
Agent Desktop allows administrators store the last users that they have reviewed. To access the list with the last users reviewed go to **Users** menu and click **Re-Open Viewed Users** option.



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.



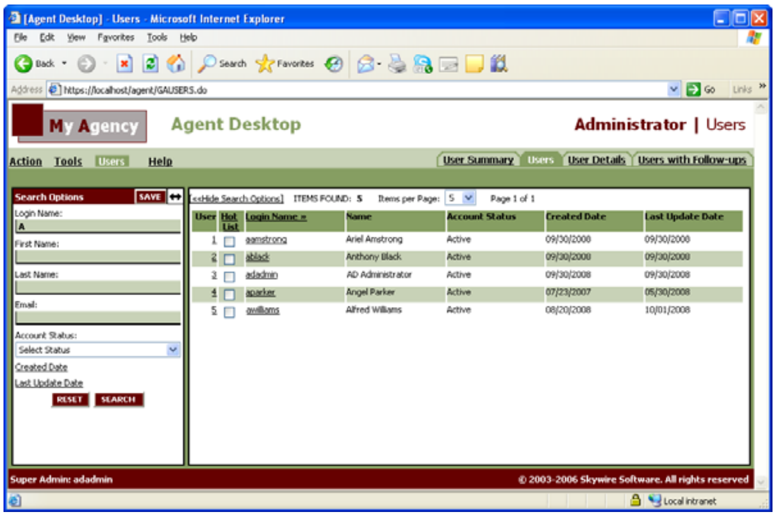
Each **Login Name** group in the list has a corresponding number of accounts related in the **Accounts** column. When you select an accounts total, you access a list of users for the selected category.

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.



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

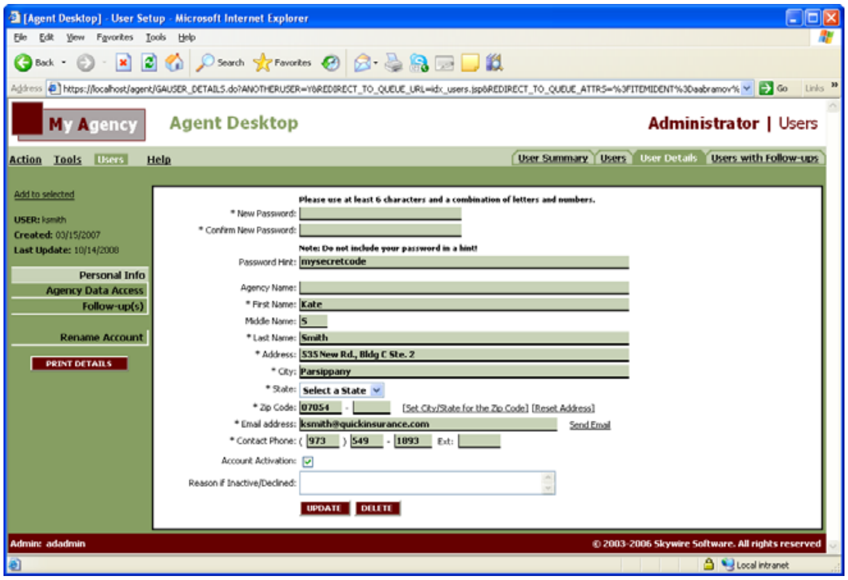
- Sort data as desired. You can set sorting order either directly from this screen or from the Preferences screen.
- Generate reports. You can use commands from the Users menu or the "Reports" drop-down list to generate the Users Report.
- Access the User Details tab. To do so, click the number in the "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.



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.

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.

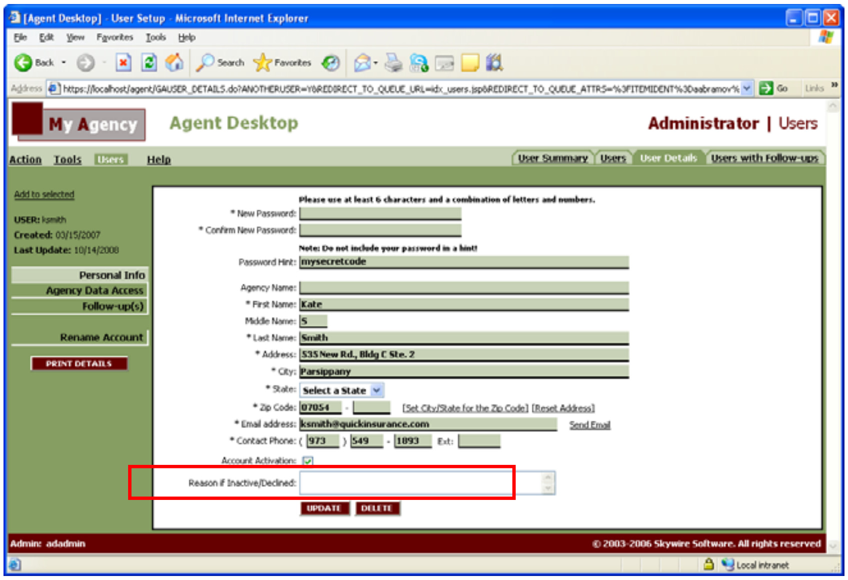
2. Click **Search**.

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.



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:

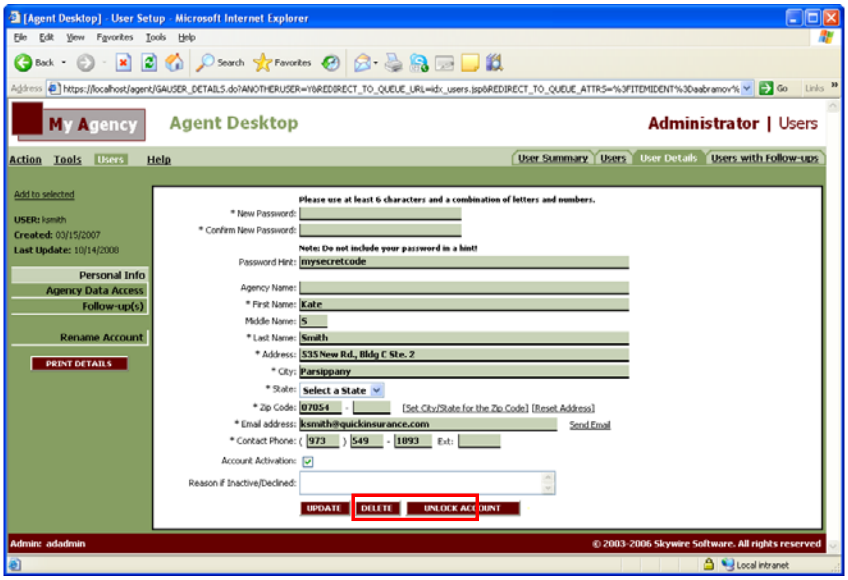
1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.

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**



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:

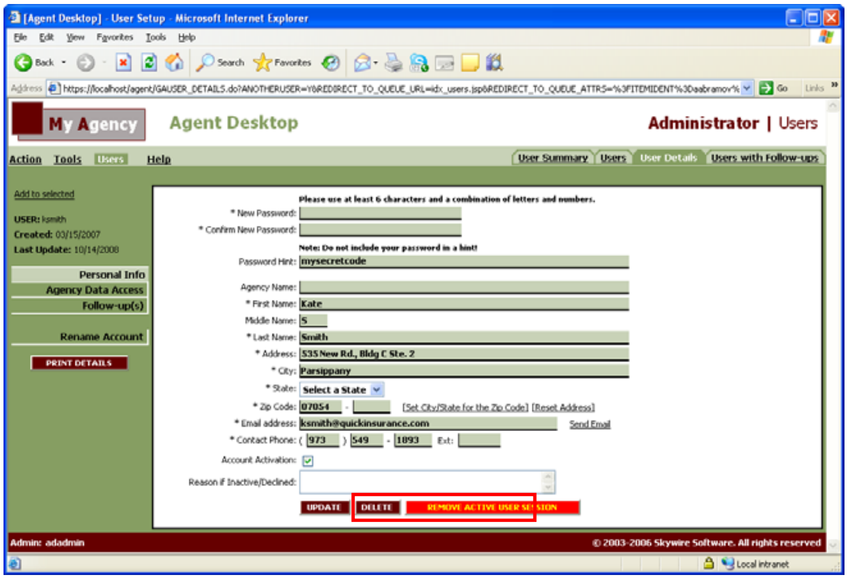
1. On the **Users** tab, select either a **Login Name** or **First Name** on the **Search Options** tool to define your search.

2. Click **Search.**

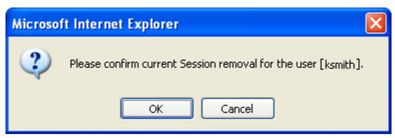
3. Click either the **Login Name** or the **User** number of the desire user.

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

4. Click **Remove Active User Session.**

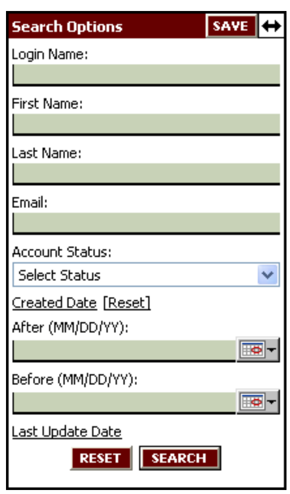


5. Confirm the Session Removal



Users (Search)

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

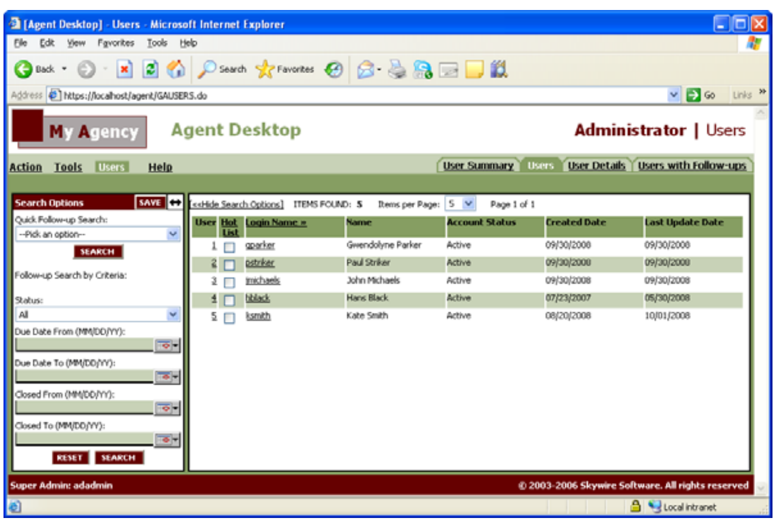


You can use the following fields to define your search criteria:

- 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.



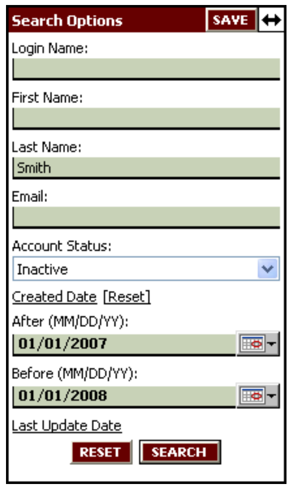
Users details on the list can be accessed by clicking either in the **User** number or the **Login Name** columns.

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.



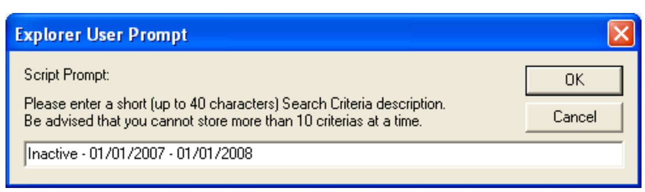
2. Click Search.

   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  at the top.

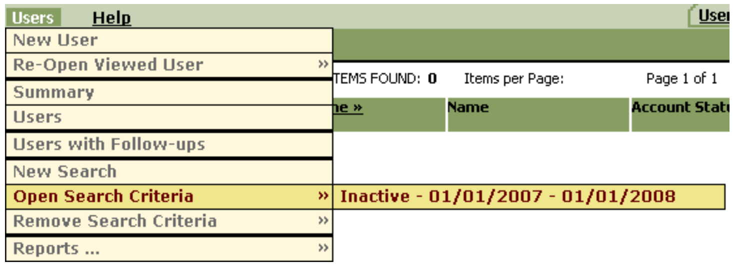
   The Explorer User Prompt dialog appears.

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.

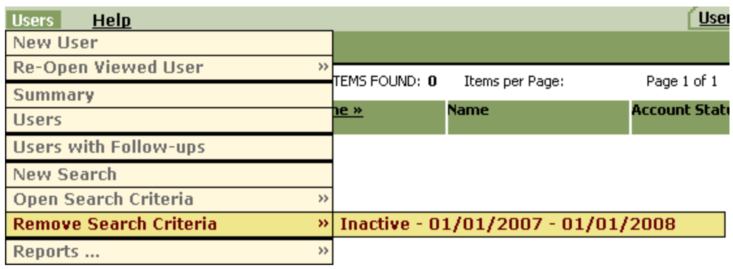


5. Click OK.

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



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

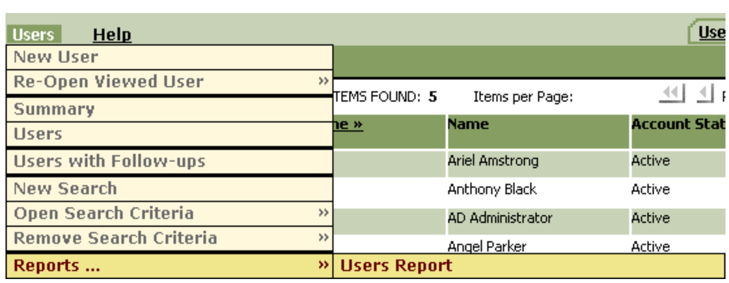


Reports

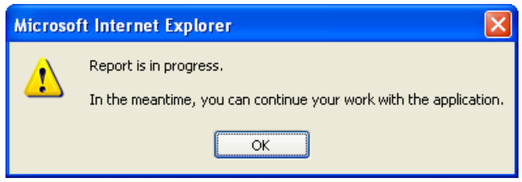
Only Users reports are available for Agent Desktop Administration Module. These reports gather administration user's information for the **Super Admin** user or user's information for **Administrator**.

User Reports

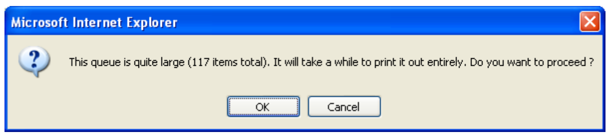
1. Open the desired list of users on which to report on the **Users** or **Users with Follow-ups** tabs.
2. Go to the **Users** menu and then to the **Reports** option to select **Users Report**.



A message appears notifying that the report is in progress.



NOTE	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:



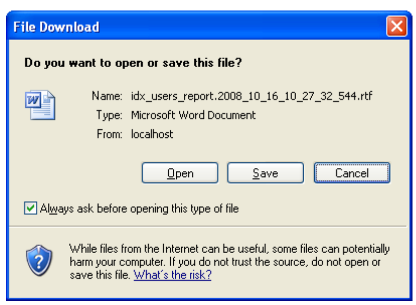
3. Click OK.

   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.



   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.

NOTE	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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