

Oracle Insurance Agent Desktop User Guide

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Introduction

Welcome to the *Oracle Insurance Agent Desktop User Guide*. Oracle Insurance Agent Desktop (Agent Desktop) gives you access to case and client data as entered in the Oracle Insurance General Agent System (GA). The Agent Desktop User Guide will show you how to manage your cases using Agent Desktop.

This guide is organized in sections that cover Agent Desktop functionality:

- Viewing Case Data
- Viewing Client Data
- Searching Cases and Clients
- Generating Reports
- Setting Viewing Preferences
- Modifying Your User Profile
- Creating a Hot List
- Saving Policy Search Criteria
- Working with Case
- Proposals/Illustrations

Audience

This guide is intended for users and system administrators who manage case and client data. A fundamental knowledge of GA is recommended.

Notational Conventions

This section explains the conventions used in this guide:

- Menu selections are shown with arrows. For example, the command to select the **Print** choice from the **File** menu looks as follows:

Select **File** ► **Print**

- File names and path names are shown in **bold**.
- New or emphasized terms are shown in *italics*.

Navigating Agent Desktop

Navigate through Agent Desktop using the top and side bar menus. Your browser's tool bars will not be displayed.

If you need to visit another web site, open another window. It is a good practice to save your work before you visit another web site or leave your desk.

Basic Safety Precautions

It is recommended that you secure your computer when you need to step away. This prevents any unintentional deletions or entries and protects the integrity of your work.

Inactivity/ Timeout

Agent Desktop, a web-based application, will log you out without saving your work if you are inactive for a length of time. Your system administrator establishes the specified time. If timeout does occur, log back onto the system and continue to work.

Clearing Temporary Files

Because Agent Desktop is web-based, you may need to clear out your browser's temporary file periodically.

Keeping the temporary file clear may improve performance by clearing off space from your hard drive.

Additional Information

For more information, see these Oracle Insurance resources:

- Oracle Insurance – GA User Guide
- Oracle Insurance – WebGA

NOTE

Netscape® and Mac® OS browsers are unable to fully support Agent Desktop.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Version	Publication Date	Comment
1 st Edition	P01-325-01	V 1.0	September 2008	Initial Creation
2 nd Edition	P01-325-02	V 1.0	February 2009	Update

Overview of Agent Desktop

Agent Desktop offers you a quick and easy method for managing case data over the Internet. With just an internet browser, you now have immediate access to client and case information as it was entered into the General Agency Management System (GA).

Agent Desktop provides a variety of tools for sorting, accessing and reporting on data as it moves through the business cycle. A comprehensive and flexible platform allows you to set viewing preferences and get to work quickly with the most up-to-date data possible.

Sort summary screens, view case data, create hot lists, generate production reports, and track pending case data over the Internet.

Agent Desktop Features

- **Easy Access:** Log into Agent Desktop and get to work immediately with easy-to-use tools and procedures for managing your case workload.
- **Customizable Viewing:** Design Agent Desktop to display data how you want it to appear on the screen.
- **Detailed Reporting:** Agent Desktop comes equipped with three production reports that can be saved to your computer, printed locally, or sent via email. You can also print the details about a specific case.
- **Hot Lists:** Identify your most important cases and clients by creating a Hot List. With just one click of the mouse, this Hot List will appear on the screen with the latest updates.
- **Flexible Search Tool:** Define and save search criteria so you can access the exact data that you need, whether that applies to individual or grouped cases and clients.

Getting Started

Agent Desktop is designed to get you up and running quickly with the data you need to complete your daily business activities. This guide will help you use Agent Desktop tools and develop procedures that maximize your management efforts.

Viewing Data

Several screens in Agent Desktop display case and client data. You can cross-reference this data and sort it in many ways.

- **Viewing Case Data:** Case data screens offer you a comprehensive breakdown of summary case totals, policy lists, and detailed information about individual cases.
- **Viewing Client Data:** Client data screens present a comprehensive list of all of your clients as well as detailed information about each client.

Agent Desktop Tools

Agent Desktop has an assortment of management tools to help you with your business needs.

- **Search Options Tool:** Use the search engine to locate case and client categories (for example, all pending cases) or specific cases and clients.
- **Viewing Preferences:** Set the way you would like to see data displayed on case and client screens.
- **Hot Lists:** Create hot lists of important case and client records. You can have access to the latest updates to these records when you log in Agent Desktop.
- **Production Reports:** Agent Desktop offers three types of reports: Pending Case, Proposal Detail, and Production Detail Analysis.

Logging in to Agent Desktop

You can log in to the Agent Desktop system with the User Name and Password that the Help Desk provided you. Once you log in the system, you can then change your password and other user profile information.

TIP: To change your password or personal information, please refer to *Modifying Your User Profile*.

Log in Failure Attempts

Agent Desktop allows you three attempts to log in to the system. If you fail to enter a valid user name and password after three attempts, the system locks your account. If this happens, you will need to call the Help Desk to unlock your account and provide you with valid login information.

Modifying Your User Profile

You can change your user profile information at any time by accessing the User Profile screen from within Agent Desktop.

NOTE

When changing your password, be sure to use a password that you have not used before. You will not be able to reuse old passwords.

To Modify Your User Profile

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

The screenshot shows the 'User Profile' screen in the Agent Desktop interface. The page has a green header with 'My Agency' and 'Agent Desktop' on the left, and 'User Profile |' on the right. Below the header is a navigation bar with 'CaseView' and 'Setup'. The main content area is titled 'Personal Info' and contains several form fields for user information. The fields are: * Old Password, * New Password, * Confirm New Password, Password Hint, * First Name, Middle Name, * Last Name, * Address, * City, * State (dropdown menu), * Zip Code, * Email address, and * Contact Phone. There are also links for '[Set City/State for the Zip Code]' and '[Reset Address]'. At the bottom of the form, it says 'Account Activation: Activated' and has an 'UPDATE' button. The footer of the page shows 'User: Test Test' and '© 2003-2006 Skywire Software. All rights reserved'.

2. On the Personal Info screen, you can make these changes:
 - a. Change your password.
 - b. Edit your personal information, name and address.
 - c. Enter a new email address or phone number.

3. After making any changes, click **Update**. Changes will not be made until Update is clicked. At that time, Agent Desktop will update your profile.

To return to Agent Desktop main page, click the CaseView link on the side menu.

Setting Viewing Preferences

Agent Desktops dynamic layout provides a tool for customizing how you view data. Use the Preferences screen to define which columns you want displayed on case and client lists. You can also establish the order of these lists.

Defining Which Columns to Display

The Case Settings and Client Settings screens allow you to choose which columns you want displayed on case and client lists. You can display up to eight columns for client lists and 16 columns for case lists.

In the Columns to Display fields, you will find drop-down lists that represent columns on the Cases and Clients tabs. Each drop-down has a complete list of all available columns on those tabs. Beginning with the first drop-down, you can define which columns will be displayed 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](#).

Case Setting Viewing Preferences

The Case Settings screen 4 options you can define:

- Case summary drill down sequence
- Case columns to display
- Items per page
- Word wrap options

You can select the options you want displayed or leave the defaults.

1. From the Tools menu, select **Preferences**. The Preferences screen will be displayed with the Case Settings tab.

My Agency **Agent Desktop** **CaseView | Preferences**

Logout Tools Clients Cases Help

Client Settings
Case Settings

Case summary drill-down sequence: [Set to Default]

Insurance Company
Case Status

Case columns to display: [Set to Default]

Policy No
Client Name
Insurance Company
Agent Name
Agency Name
Case Status
Office Status
Base Plan
Face Amount
Modal Premium
Payment Mode
Annualized Premium
Target Premium
Case Open Date
UW Class
Generic Plan
Case Code

Items per Page: 5

Word Wrap Options: Extend column width to fit long words [Set to Default]

UPDATE

User: Test Test © 2003-2006 Skywire Software. All rights reserved

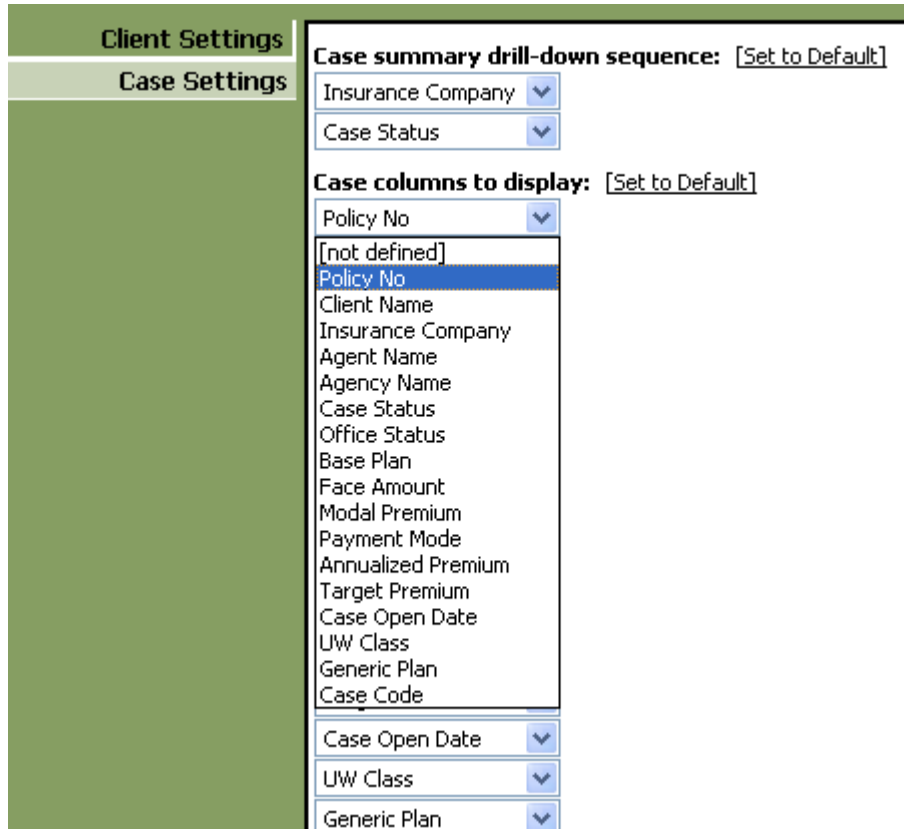
- In the **Case summary drill-down sequence** area of the screen, define the viewing order for Agent Category, Agent Code, and Insurance Company. These selections will define how data is to be displayed on the Case Summary tab.

Client Settings
Case Settings

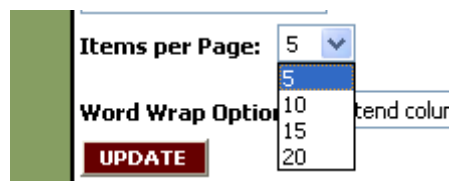
Case summary drill-down sequence: [Set to Default]

Insurance Company
Insurance Company
Case Status

- In the **Case Columns to Display** field, select the columns you would like displayed on the Cases tab. The order of your selections also determines the order of the columns on the Cases tab. The top selection will appear on the left side of the screen, followed by the other selections in descending order.



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



- Select how you want the **Wording to Wrap** on the columns.
- Click **Update**. Changes will not be made until Update is clicked. At that time, Agent Desktop will update your case settings.



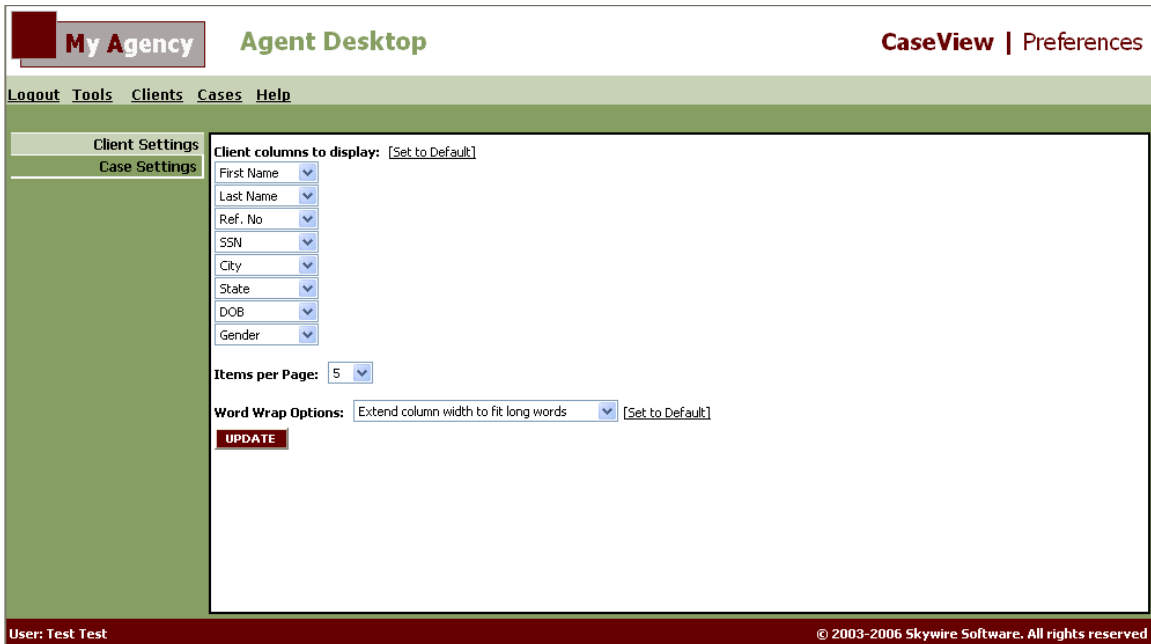
7. When you finish with case settings, click **Client Settings**.

Client Setting Viewing Preferences

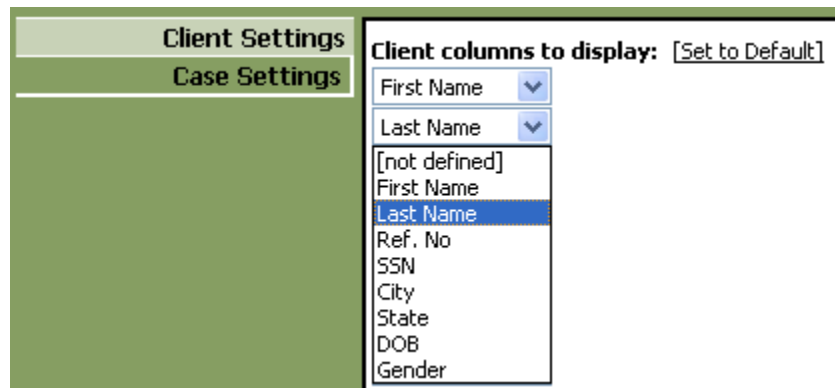
The Client Settings screen has three options:

- Client columns to display
- Items per page
- Word wrap options

You can select the options you want displayed or leave the defaults.



8. In the **Client Columns to Display** field, select which columns you would like displayed on the Clients tab. The order of your selections also determines the order of data columns on the Clients tab. The top selection will appear on the left side of the screen, followed by the other selections in descending order.



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

10. Select how you want the **Wording to Wrap** on the columns.
11. Click **Update**. Changes will not be made until Update is clicked. At that time, Agent Desktop will update your client settings.

Use the Clients or Cases menu link to return to one of those screens.

Sorting Capabilities

Agent Desktop offers you several methods for sorting data on the various case screens. You can select the order in which columns appear on the screen (left to right) as well as click a column heading to sort data in ascending and descending order.

Using the Search Options Tool

Agent Desktop has a Search Options tool that helps you find the data you need. This search engine provides many ways to locate individual or grouped cases or clients.

The Search Options tool is located on the left hand side of the screen on the Case Summary, Cases and Clients screens. The search tool will display the appropriate fields for entering search criteria depending upon the screen. Results are displayed on the screen where you conducted the search.

TIP: Click "Show Search Options" or "Hide Search Options" to add or remove the Search Options tool from the screen.

Entering Multiple Search Criteria

The Search Options tool allows for multiple criteria selections so that you can generate a variety of case or client lists.

You can enter in as many search criteria as you need. Generally, the more search criteria you enter will reduce the number of results returned. Some fields may have additional options for you to search on or allow you to enter a date range.

TIP: You can also make multiple selections within the drop-down lists on the Search Options tool. Simply use the Ctrl or Shift key to highlight multiple selections.

Saving Policy Search Criteria

Rather than type in the same search criteria repeatedly, you can save your most frequently used search queries. Up to 10 search queries can be saved. Unused queries can be deleted at any time.

Saving Policy Search Criteria

1. In the **Search Options** tool on the left side of the screen, select search criteria as described in Using the Search Options Tool.
2. Click **Search**. The search results will be displayed on the main portion of the screen.

The screenshot shows the Oracle Insurance Agent Desktop interface. On the left is the 'Search Options' tool with fields for 'Inscos', 'Agency Name', 'Agent first or last Name', 'Client first or last Name', 'Client Phone', and 'Policy Number'. The main area displays search results for 'American General Financial Gro' and 'Genworth Life & Annuity Ins Co'. The results table is as follows:

Item	Hot List	Policy No	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	UME136190L (Has notes)	Anne Dillon	American General Financial Gro	Jhon Doe	American Agency	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
2	<input type="checkbox"/>	UME136191L (Has notes)	Anne Dillon	American General Financial Gro	Jhon Doe	American Agency	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008

At the bottom of the interface, it says 'User: Test Test' and '© 2003-2006 Skywire Software. All rights reserved'.

3. In the **Search Options** tool on the left side of the screen, click **Save** at the top. The Explorer User Prompt dialog will be displayed.

The 'Explorer User Prompt' dialog box has a blue title bar and a close button (X) in the top right corner. It contains the following text:

Script Prompt:
Please enter a short (up to 40 characters) Search Criteria description.
Be advised that you cannot store more than 10 criterias at a time.

Below the text is a text input field containing the text 'American General Search'. To the right of the input field are two buttons: 'OK' and 'Cancel'.

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 will now appear on the either the Cases or Clients tab under Open Search Criteria, depending on whether you conducted a case or client search.

TIP: To remove a search criteria description, click the description under "Remove Search Criteria" on the "Cases" or "Clients" menu.

Viewing Case Data

There are numerous ways to access or display the case data you need in Agent Desktop. The following screens offer summary totals as well as detailed information on all of your cases.

- **Case Summary Tab:** The Case Summary tab is designed to give you a quick view of summary data. To access more specific case information, generate reports, or create Hot Lists, proceed to Working with Case Lists.
- **Cases Tab:** The Cases tab displays a list of cases as accessed from the Case Summary tab.
- **Case Details Tab:** The Case Details tab offers the most comprehensive data for a particular case

Case Summary Tab

The Case Summary Tab provides a listing of case totals as broken down by Case or Agent Category, Case or Agent Code, and Insurance Company. These three categories appear in a drill-down sequence. You can use this tab to get a quick summary view of case totals and to access specific case lists organized by the three categories mentioned above.

For more information about this tab, refer to Working with Case Summaries.

The screenshot displays the 'Case Summary' tab in the Agent Desktop application. The interface is divided into several sections:

- Header:** 'My Agency' logo, 'Agent Desktop' title, and 'CaseView | Cases' navigation.
- Navigation:** 'Logout Tools Clients Cases Help' menu and 'Case Summary Cases Case Details' sub-tabs.
- Search Options:** A panel on the left with a 'SAVE' button and fields for:
 - Case Ref. No.
 - Agency Name
 - Agent first or last Name
 - Client first or last Name
 - Client Phone
 - Policy Number
 - Case Status
 - Office Status
 - Case Open Date
 - History Status
- Main Content:** A table titled 'Insurance Company > Case Status' showing 'Total Case Assignments':

Insurance Company	Case Status	Total Case Assignments
American Real Agency		2
Prudential American Agency		1
West Agency		3
- Footer:** 'User: Test Test' and '© 2003-2006 Skywire Software. All rights reserved'.

Cases Tab

The Cases tab displays case listings as accessed from the Case Summary tab. You can view such details as client, entry date, and face amount and case status from this screen. You can also open the Case Details tab from this screen and access more detailed information about a particular case. You can generate reports from this tab and set the sorting order for data as well.

For more information about this tab, refer to Working with Case Lists.

Item	Hot List	Policy No. »	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Jhon Doe	Prudential Select Brokerage	Smith Parker	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L1111179456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

Case Details Tab

The Case Details tab offers you the most detailed information about a case and presents data in the following categories: Case Profile, Case Requirements, Case Notes and Illustrations. You also have access to a comprehensive listing of client data and can generate a Case Detail report from this screen.

For more information about this tab, refer to Working with Case Details.

My Agency **Agent Desktop** **CaseView | Cases**

Logout Tools Clients Cases Help Case Summary Cases Case Details

Add to selected

CASE: 111
CLIENT: Doe, Jhon

Case Profile

Owner(s)
Payer(s)
Requirement Status
Case Notes
Illustrations

PRINT DETAILS

Client Name:	Jhon Doe
Case Status:	Inforce
Policy No / Ref No:	U8754233
Agency Name:	American Agency
Agent Name:	Rose Parker
Insko Name:	Prudential Select Brokerage
Plan:	Essential 30
Generic Plan:	30 Year Level Term
Face Amount (\$US):	750,000
Modal Premium (\$US):	175.28
UW Class Requested:	
Annualized Premium (\$US):	762.31

INSURED5

First Name	Last Name	SSN	Age	Is Primary	
Jhon	Doe	111-111-1111	34	Yes	Show details

PAYERS

Name	SSN	Trust Date	Relationship	
Jhon Doe	111-111-1111			Show details

User: Test Test © 2003-2006 Skywire Software. All rights reserved

Locating Policies

Agent Desktop has several ways to locate policies. A number of tabs allow you to click on a policy number to open the specific details of the case. You can also create a Hot List and have quick access to high profile or important cases. Refer to Creating a Hot List for more details about this procedure.

The Case Summary and Cases tabs also contain a **Search Options** tool on the left side of the screen. You can enter a variety of search data into these fields to narrow your search for a particular case.

Basic and Advanced Search Options

You can use the **Basic Search** or **Advanced Search** option for policy searches. These options are in the upper-left portion of the screen. An Advanced Search allows you to enter more search criteria than a Basic Search.

Basic Search Criteria Fields

The Basic Search Options tool allows you to enter any of the following search criteria to define your policy search:

- **Agent or Case Codes:** This drop-down list allows you to select multiple case/agent codes for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to Case or Agent Codes.

- **Attached Codes:** This drop-down list allows you to select multiple attached codes (codes attached to the case in GA) for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to Attached Codes.
- **Insco:** This drop-down list allows you to select multiple insurance companies for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to Insco.
- **Ref. No:** If you know the specific reference number for the case, type it here.
- **Agency Name:** Type the name of the agency or a portion of the name.
- **Agent first or last Name:** You can search for cases by just using the first name or last name of the agent. Search results will show all cases for an agent with this first or last name.
- **Client first or last Name:** You can search for cases by just using the first name or last name of the client. Search results will show all cases for a client with this first or last name.
- **Case Status:** This drop-down list allows you to select multiple case statuses for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to Case Status.

Advanced Search Criteria Fields

Besides containing all fields from the Basic Search option, the Advanced Search also includes these selection fields:

- **Client Phone:** If you know the phone number for the client, type it here. Cases that contain this client phone number are displayed on the screen.
- **Policy Number:** Type the policy number here to locate a specific case.
- **Office Status:** This drop-down list allows you to select multiple office statuses for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to Office Status.
- **Entered 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 cases entered 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.
- **History Status:** This drop-down list allows you to select multiple history statuses (i.e. Issue Date, Policy Date) for search criteria. Use the Ctrl or Shift key to make multiple selections. If you would like to clear your selections for this list only, select the "Reset" button next to History Status.

To maximize the use of the Search Options tool, try different combinations of search criteria to generate your case lists. Following is an example of a case search and the ensuing result.

Locating Policies with the Search Options Tool

1. In the Search Options tool on the left side of the screen, type data into any of the available fields to narrow down the policy search.

The screenshot shows the 'Agent Desktop' interface with the 'Search Options' tool on the left and search results in the main area. The search criteria include 'Inco' and 'American General Financial Gro'. The search results table is as follows:

Item	Hot	Policy No. »	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	UME136190L (Has notes)	Anne Dillon	American General Financial Gro	Jhon Doe	American Agency	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
2	<input type="checkbox"/>	UME136191L (Has notes)	Anne Dillon	American General Financial Gro	Jhon Doe	American Agency	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008

2. When you finish setting your search criteria, click **Search**. The search results will be displayed in the main portion of the screen.

TIP: You can use the "Reset" button to clear the screen of search criteria and begin a new.

Sorting Case Data

Agent Desktop offers you several methods for sorting data on the various case screens. You can select the order in which columns appear on the screen (left to right) as well as click a column heading to sort data in ascending and descending order.

Sorting Case Summary Data

Case Summary data appears in three categories: **Case (or Agent) Code**, **Case (or Agent) Category**, and **Insurance Company**. You define their order on the Case Settings screen. Refer to Setting Viewing Preferences for instructions on how to do this.

Sorting Case Lists Data

You can determine the order of columns for the Cases tab on the Case Settings screen. If you would like to set the sorting order directly on the Cases tab, follow this procedure:

1. To select the column that will appear furthest left on the screen, select the checkbox for Setting First Column, and then click the column header of the desired column. The column that you have selected will be displayed on the far left of the screen.

[« Show Report Management Panel »]

« Hide Search Options » ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item	Hot List	Agent Name	Policy No	Client Name	Insurance Company	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	Smith Parker	L123289566 (Has notes)	<u>Jhon Doe</u>	Prudential Select Brokerage	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/200
2	<input type="checkbox"/>	Smith Parker	L124289456 (Has notes)	<u>Jhon Doe</u>	West Coast Life	Example Corp	Inforce		Focus Term-30	250,000	21.44		257.28	0.00	04/01/200
3	<input type="checkbox"/>	Smith Parker	L127779456 (Has notes)	<u>Jhon Doe</u>	West Coast Life	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/200
4	<input type="checkbox"/>	Smith Parker	L127779456 (Has notes)	<u>Jhon Doe</u>	American General Financial Gro	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/200

2. Now you can order the rest of the columns. Click the column heading that you would like to appear next. Repeat this process until you have finished ordering the columns.

NOTE Columns that are not underlined cannot be used in this process. You cannot sort cases by the Face Amount, Annual Premium, and Modal Premium fields.

3. Once a column has been set to a certain relative position, you can click the column heading again to sort that data in ascending and descending order.

Every time you access the Cases tab, the columns will appear in the order you just established.

IMPORTANT When you establish the order of columns from left to right, you also establish the ascending/descending sorting criteria. For example, if you select Insurance Company (descending) as your first column and Agent Name (ascending) as your second column, then data will first be sorted by Insurance Company in descending order. Within the insurance company sort, agent name will be sorted in ascending order. In this way, you can establish multiple levels for sorting criteria.

Understanding the Toggle Arrow

Once a columns left-to-right position has been set, the toggle arrow next to the column heading signifies the following:

- Arrow pointing to the left: ⏪ This means that the column is sorted in descending order.
- Arrow pointing to the right: ⏩ This means that the column is sorted in ascending order.

Understanding Proposals/Illustrations

On the Cases tab, you can generate a list of case proposals for specific insurance companies, agent codes, agents or clients. You can then create a Proposal Detail Report from this list as well.

Generating a List of Case Proposals

- Click a case total on the **Case Summary** screen for any case category. Once the **Cases** tab opens with a list of cases, select **Proposal** from the **Status** field on the **Search Options** tool. Click **Search**.
- Search for a list of policies on the **Cases** tab using the **Search Options** tool. Be sure to select **Proposal** from the **Status** field. Click **Search**.
- Generate a **Proposal Detail Report**. Refer to Proposal Detail Report for instructions on this procedure.

Any of these actions will produce the desired list of case proposals on the Cases tab.

Notes on Lead Illustrations

If there is one - and only one - Lead Illustration attached to a case, then the word **Lead** appears after the Policy No/Ref. No. on the Cases tab.

Any Illustration that is a Lead Illustration has the word **Lead** following the Sent Date on the Illustrations screen of the Case Details tab

Any Illustration that is a Lead Illustration has the word **Lead** following the Sent Date on the Proposal Detail Report.

TIP: You access Illustrations on the Case Details tab. To view Illustrations, click "Illustrations" on the left side of this screen.

Face Amount, Modal Premium, Annual Premium, and generic Premium Component can have varying amounts for proposal cases with leads, depending on the number of Lead Illustrations attached to the case.

- **No Lead Illustration:** If there is no Lead Illustration, then the values of the Illustration with the lowest Face Amount are used.
- **One Lead Illustration:** If there is one Lead Illustration, then the values of that Illustration are used.
- **More than One Lead Illustration:** If there is more than one lead illustration, then the values of the Lead Illustrations are averaged together.

NOTE

If there are no Illustrations at all on a Proposal, then the proposal is not used for any counts or averages.

Working with Case Summaries

The Case Summary tab provides a summary view of case totals as broken down by three categories: **Case or Agent Category**, **Case or Agent Code**, and **Insurance Company**. How your account has been set up determines whether you see Case Codes and Categories or Agent Codes and Categories.

Each category in the list has a corresponding Total Case Assignments to the right of the screen. When you select a case total, you can access a list of cases for the selected category.

TIP: *To change the order of the Agent/Case Category, Agent/Case Code and Insurance Company categories, refer to Setting Viewing Preferences.*

The case summary list offers drill-down functionality for sorting data. By default, the screen first displays the Case/Agent Category. When you select a case/agent category, you move to the next summary level of Case/Agent Code. You can then select a case/agent code to move to the next summary level of Insurance Company. This drill-down process provides an excellent view of case totals and immediate access to a list of those particular cases.

TIP: *Click any "Case Total" figure in the right column to open the Cases tab and display a case list for the category you have selected.*

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 Case Summary screen. For instance, if you only want to view case totals for Protective Life, then you select Protective Life from the Insco drop-down list field and click Search. The results appear on the main portion of the screen.

Refreshing Data

If you log out of Agent Desktop from the Case Summary tab, the next time you log in, on the Case Summary tab you will see a **Refresh Summary data now!** button. Click this button to update data on the screen. This button ensures that you have the most up-to-date data while viewing case summaries.

If you log in to a different screen (i.e., Policies tab) and then navigate to the Case Summary tab, data is refreshed automatically. You will not see this button.

Working with Case Lists

The Cases tab displays a list of cases as accessed from the Case Summary tab. For example, if you clicked 10 next to Manulife Financial on the Case Summary tab, then the Cases tab would display the ten cases that are associated with Manulife Financial.

The Cases tab offers several options for working with case 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 Case Settings screen. Refer to Setting Viewing Preferences for details about the Case Settings screen, or refer to the Data fields section for instructions on how to reset column order directly on this screen.
- **Generate reports:** You can use commands from the Cases menu or the Reports drop-down list to generate any of the following reports: Pending Case, Proposal Detail, and Production Detail Analysis. Refer to Generating Reports for more details about reports.
- **Access the Case Details tab:** Click the number in the Cases column next to any case listing. The Case Details screen contains Case Profile, Case Requirements, Case Notes and Illustrations for a particular case. Refer to Working with Case Details for more information about this tab.
- **Access the Client Details tab:** Click any Client Name on the case list. This screen provides the following client data: Personal Info, Address, Phone, Email, and Cases. Refer to Working with Client Details for more information about this tab.
- **Add cases to a Hot List:** Refer to Overview of Hot Lists for more information about working with Hot Lists.
- **Conduct policy searches:** Refer to Using the Search Options Tool for detailed instructions on conducting case and client searches.

Data Fields

The Cases tab presents thirteen columns of case data. The policy number always appears as the first column. By default, these columns appear in the following order from left to right: **Policy No/Ref No, Agent Name, Client Name, Entry Date, Case Status, Insurance Company, Face Amount, Modal Premium, Annual Premium, Generic Plan, Base Plan, UW Class, and Agency Name.**

TIP: *When an asterisk appears next to the reference number of a case, it signifies that case notes are attached to the policy.*

Resetting the Sorting Order of Data Columns

1. From the **Reset Sorting Order list**, select the title of the column that you would like to appear furthest left on this screen. The system will change the order of columns so that your selection appears furthest left on the screen.
2. Click an **Underlined Column Heading** to select the next column in the order sequence. That column will be displayed next in the sequence.

[«« Show Report Management Panel »»]

««Hide Search Options»» ITEMS FOUND: 6 Items per Page: 5 << < Page 1 of 2 > >>

<-- Check this box to set the first sorting column

Item	Hot List	Agent Name	Policy No	Client Name	Insurance Company	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	Smith Parker	L123289566 (Has notes)	<u>Jhon Doe</u>	Prudential Select Brokerage	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/200
2	<input type="checkbox"/>	Smith Parker	L124289456 (Has notes)	<u>Jhon Doe</u>	West Coast Life	Example Corp	Inforce		Focus Term-30	250,000	21.44		257.28	0.00	04/01/200
3	<input type="checkbox"/>	Smith Parker	L127779456 (Has notes)	<u>Jhon Doe</u>	West Coast Life	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/200
4	<input type="checkbox"/>	Smith Parker	L127779456 (Has notes)	<u>Jhon Doe</u>	American General Financial Gro	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/200

NOTE Columns that are not underlined cannot be used in this process.

3. Repeat **Step 2** until you have ordered all possible columns as desired.

Every time you access the Cases tab, the columns will be displayed in the order you just established.

Working with Case Details

The Case Details tab offers the most comprehensive data for a particular case and presents this data in the following categories: Case Profile, Case Requirements, Case Notes and Illustrations. You also have access to a comprehensive listing of client data from this screen and can generate a Case Detail report with one click of the mouse.

Case data appear as follows on this screen:

- **Case Profile:** The Case Details tab opens with case profile data displayed on the main screen. This data is primarily the same as the data you saw listed on the Cases tab for this policy, but it also contains more data about the insured and beneficiaries.
- **Case Requirements:** To the left of the screen, click **Case Requirements** to display a list of requirements for this policy. Requirements are listed with the following data: Type, Code, Description, Date Requested, Date Due, Date Closed Status, Status Date, and Status Reason.
- **Case Notes:** To the left of the screen, click **Case Notes** to display a list of notes attached to the case.
- **Illustrations:** Illustrations are displayed on this screen if they exist for the case. To learn more about proposals and illustrations, refer to Understanding Case Proposals/Illustrations.

TIP: Click "Print Details" on any of these screens to generate a detailed report about the case.

Accessing Detailed Client Data

1. To the left of the screen, click the **Client Name** listing. The Client Details tab will be displayed with detailed client data.

The screenshot shows the 'CaseView | Cases' interface. The left sidebar contains a navigation menu with options: Case Profile, Owner(s), Payer(s), Requirement Status, Case Notes, and Illustrations. A 'PRINT DETAILS' button is located below the menu. The main content area displays client information for 'Jhon Doe'. The 'INSURED' table shows one insured with SSN 111-111-1111, age 34, and is the primary insured. The 'PAYERS' table shows Jhon Doe as the payer with SSN 111-111-1111. The bottom status bar indicates 'User: Test Test' and '© 2003-2006 Skywire Software. All rights reserved'.

First Name	Last Name	SSN	Age	Is Primary	
Jhon	Doe	111-111-1111	34	Yes	Show details

Name	SSN	Trust Date	Relationship	
Jhon Doe	111-111-1111			Show details

2. You can move around the client detail screens as explained in Working with Client Details.

The screenshot shows the 'CaseView | Clients' interface. The left sidebar contains a navigation menu with options: Personal Info and Case(s). The main content area displays personal information for 'Jhon Doe'. The 'Personal Info' section includes fields for Ref. No. (111), First Name (Jhon), Middle Name, Last Name (Doe), DOB (09/15/1970), State of Birth, Country, SSN (111-11-1111), Gender (Male), Marital Status, US Citizen? (checked), Citizenship (if not), Visa type, Visa Number, Driver License, and State. There are also empty fields for Addresses and Phones. The bottom status bar indicates 'User: Test Test' and '© 2003-2006 Skywire Software. All rights reserved'.

3. To return to the Case Detail tab, select the case listing from the Re-open Viewed Case from the Cases menu.

Adding this Case to a Hot List Selection List

1. In the upper-left corner of the screen, click **Add to selected**.

The screenshot displays the Oracle Insurance Agent Desktop interface. At the top left, there is a 'My Agency' logo and 'Agent Desktop' text. On the top right, it says 'CaseView | Cases'. Below this is a navigation bar with 'Logout Tools Clients Cases Help' and tabs for 'Case Summary Cases Case Details'. On the left sidebar, there is a red-bordered button labeled 'Add to selected'. Below it, the case information is displayed: 'CASE: CLIENT: Doe, Jhon'. The main content area shows a detailed view of the case, including fields for Client Name, Case Status, Policy No / Ref No, Agency Name, Agent Name, Insc Name, Plan, Generic Plan, Face Amount, Modal Premium, LW Class Requested, and Annualized Premium. Below this, there are two tables: 'INSURED' and 'PAYERS'. The 'INSURED' table has columns for First Name, Last Name, SSN, Age, and Is Primary. The 'PAYERS' table has columns for Name, SSN, Trust Date, and Relationship. At the bottom left of the sidebar, there is a 'PRINT DETAILS' button. At the bottom of the screen, it shows 'User: Test Test' and a copyright notice: '© 2003-2006 Skywire Software. All rights reserved'.

A red check mark will indicate that this case is now on the current selection list for a Hot List.

2. Consider the following:

- If you would like to view the current selections you have made for a Hot List, select Review Selection from the Cases menu.
- If you would like to create the Hot List now, select Save Selection as a Hot List from the Cases menu. Follow the instructions detailed in Building a Hot List.
- If you would like to continue working with the current case information, proceed as desired.

Viewing Client Data

Agent Desktop offers several methods for accessing the client data you need, as well as a number of tools for working with this data. You can view and sort client details, define and save client search criteria, and gain direct access to case data associated with particular clients.

- **Clients tab:** The Clients tab displays a list of all clients associated with your cases. You can sort data on this screen, add clients to a client Hot List, and perform client searches with the Search Options tool.
- **Client Details tab:** The Client Details tab offers you the most detailed information about a client and presents data in the following categories: Personal Info, Addresses, Phones, Emails, and Cases. You also have direct access to case data from this screen.

Locating Clients

Agent Desktop has several ways for locating clients. You can click on a client name on the Cases tab or click a client number on the Clients tab to open the specific details of a client. You can also create a Hot List and have quick access to high profile or important clients. Refer to Creating a Hot List for more details about this procedure.

The Clients tab contains a Search Options tool on the left side of the screen. You can enter a variety of search data into these fields to narrow your search for a particular client or a list of clients.

Entering Multiple Search Criteria

The Search Options tool allows for multiple criteria selections so that you can generate a variety of client lists.

You can enter any of the following search criteria to define your client search:

- **Case Codes:** Make a selection from the drop-down list. This list includes case codes from various points of sale.
- **Client First Name:** Enter the first name of the client. If you type 'Daniel,' all clients with the first name Daniel will appear on the Clients tab.
- **Client Last Name:** Enter the last name of the client. If you type 'Smith,' all clients with the last name Smith will appear on the Clients tab.
- **Client SSN:** Enter the client's SSN to search by Social Security number.
- **Client Ref. No:** If you know the GA reference number for this client, type it here.

- **Client Phone:** If you know the phone number for the client, you can use it as search criteria here.
- **Client Email:** If you know the email address for the client, you can use it as search criteria here.
- **State of Residency:** Select a state of residency to generate a list of clients by state.
- **ZIP Code:** Select a ZIP code to generate a list of clients by ZIP code.
- **Gender:** Select Male or Female from the drop-down list to generate a list of clients by gender.

To maximize the use of the Search Options tool, try different combinations of search criteria to generate your client lists. Following is an example of a client search and the ensuing result.

Locating Clients with the Search Options Tool

1. In the Search Options tool on the left side of the screen, enter data into any of the available fields to narrow down the client search.
2. When you finish setting your search criteria, click Search. The search results will be displayed in the main portion of the screen.

TIP: You can use the "Reset" button to clear the screen of search criteria and begin a new.

Sorting Client Data

Agent Desktop offers you several methods for sorting data on client screens. You can select the order in which columns appear on the screen (left to right) as well as sort data in ascending and descending order.

Sorting Data on the Clients Tab

You can define the order of columns on the Clients tab on the Client Settings screen. This procedure allows you to establish the order of each column as it appears on this tab. Please see Setting Viewing Preferences for instructions.

Sorting Client Data on the Clients Tab

You can determine which column appears furthest left on the screen directly on the Clients tab. Use the following procedure to do so:

1. Click an **Underlined Column Heading** to move that column furthest left on the screen. The column sorts in ascending order.
2. Click the toggle arrow in this column to change the sort order. The column now sorts in descending order.

Understanding the toggle arrow

Once a column's left-to-right position has been set, the toggle arrow next to the column heading signifies the following:

- Arrow pointing to the left: « This means that the column is sorted in descending order.
- Arrow pointing to the right: » This means that the column is sorted in ascending order.

Click a column heading to change the direction of the sort. You can fashion group sorting in this way, with the column to the left determining the group sorting/sort order.

Working with Clients

The Clients tab provides a summary view of all clients associated with your cases. By default, the following data columns for each client appear in this order: First Name, Last Name, Ref. No, SSN, City, State, DOB, and Gender.

TIP: To modify the order in which these columns appear, refer to *Setting Viewing Preferences*.

You can perform the following actions on the Clients tab:

- **Define sorting order:** When you click a column heading, data is sorted in ascending or descending order as defined in that column.
- **Access client details:** You can click any number to the left of a client listing to access the Client Details tab. This screen contains the following data for a particular client: Personal Info, Addresses, Phones, Email Addresses, and Case data.
- **Add clients to a Hot List:** Refer to Overview of Hot Lists for more information about working with Hot Lists.
- **Conduct client searches:** For detailed instructions on using the Search Options tool, refer to Using the Search Options Tool.

Working with Client Details

The Client Details tab contains data for a particular client. Data categories are: Personal Info, Address(es), Phone(s), Emails, and Case(s). You also have access to cases associated with this client from this screen.

When you click on one of these listings in the left portion of the screen, the following data will be displayed from the Client Details tab:

- **Personal Info:** The Client Details tab opens with a list of personal data about the client, including date of birth, gender, Social Security number, and marital status.
- **Address(es):** The Addresses screen displays any addresses associated with the client.

- **Phone(s):** The Phones screen displays any phone numbers associated with the client.
- **Email(s):** The Emails screen displays any email addresses associated with the client.
- **Case(s):** The Cases screen provides a list of cases associated with the client. You can select a policy number to open the Case Details screen for that case.

Accessing Detailed Client Data

1. Do one of the following:

- In the upper-left corner of the Case Detail tab, select the Client Name listing.
- On the Clients tab, click any number to the left of a client listing.
- From the Clients menu, select the client name from the Re-open Viewed Client sub-menu (if you have recently viewed this client file).
- On the Case Details tab, select Show Details next to the listing of the insured in the Insureds list.

After you perform one of these actions, the Client Details tab will be displayed with detailed client data.

2. You can move around these screens to access data as described on this page.

3. To return to the Case Detail tab, select the case listing from the Re-open Viewed Case from the Cases menu.

Adding Client to a Hot List

1. In the upper-left corner of the screen, click **Add to selected**.

The screenshot shows the Oracle Insurance Agent Desktop interface. At the top, there are logos for 'My Agency', 'Agent Desktop', and 'CaseView | Clients'. Below these are navigation tabs: 'Logout', 'Tools', 'Clients', 'Cases', 'Help', and 'Client Details'. The left sidebar contains a menu with 'Add to selected' (highlighted in red), 'CLIENT: Doe, Jhon', 'Personal Info', and 'Case(s)'. The main content area displays the following client details:

- Ref. No: 111
- First Name: Jhon
- Middle Name: [Empty]
- Last Name: Doe
- DOB (MM/DD/YY): 09/15/1970
- State of Birth: [Empty] Country: [Empty]
- SSN: 111 - 11 - 1111
- Gender: Male
- Marital Status: [Empty]
- US Citizen? Citizenship (if not): [Empty]
- Visa type: [Empty] Visa Number: [Empty]
- Driver License: [Empty] State: [Empty]
- Addresses: [Empty]
- Phones: [Empty]
- Emails: [Empty]

At the bottom left, it says 'User: Test Test' and at the bottom right, '© 2003-2006 Skywire Software. All rights reserved'.

A red check mark will be displayed to indicate this client is now on the current selection list for a Hot List.

2. Consider the following:

- If you would like to view the current selections you have made for a Hot List, select Review Selection from the Clients menu.
- If you would like to create the Hot List now, select Save Selection as a Hot List from the Clients menu. Follow the instructions detailed in Building a Hot List.
- If you would like to continue working with the current case information, proceed as desired.

Generating Reports

Agent Desktop contains production reports. You can generate production reports about all data in the system, or you can define the scope of your reports using the Search Options tool to limit the reports to particular case statuses, agents, clients, and/or insurance companies. Reports offer a flexible means for generating Microsoft Word or WordPerfect documents, which you can then save to your computer, print, email, or edit.

NOTE

You can designate any GA codes attached to a case to appear in the reports. GA activity notes - if they exist - will appear in the reports.

You can generate production reports from any location within the Agent Desktop system. Use the **Reports** command on the Cases menu or the **Show Report Management Panel** link on the Cases tab to generate any of the following types of reports:

- **Pending Case Report:** This command generates a report on all cases with a Pending status (i.e., formal, informal).
- **Proposal Detail Report:** This command generates a report on all cases with a Proposal status.
- **Production Detail Analysis Report:** This command generates a report on all cases with an All Codes status.

TIP: *You can also generate a report which contains the details about an individual case.*

When you generate a report using the Reports command on the Cases menu, the report will first open on the Cases tab with a list of all cases that apply to the selected report (i.e., all pending cases for a 'Pending Report'). You can either generate the report immediately or narrow the scope of the report using the Search Options tool. With the Search Options tool, you can limit the report to particular agents, clients, and/or insurance companies.

TIP: *Refer to Setting Parameters for Reports for more details about defining which data is contained in your report.*

Sorting Data before Generating a Report

There are several ways to determine the appearance of a report. You can use the Report Management Panel to define sort criteria for your report. For example, you can define sorting parameters so the report is first sorted by agent name, then by case status, and then by insurance company. The report will contain sub-totals for all sorting categories that you've selected.

IMPORTANT

If a case has more than one agent code, then that case will appear under each Agent Code in a report (if you have selected to sort by agent code). For example, if you have agent codes 'Don Jordan' and 'Mike Smith,' and each agent is attached to Case X, then Case X will appear under both the Don Jordan listing and the Mike Smith listing.

Setting Parameters for Reports

You can define the scope of a report either from the Case Summary tab or the Cases tab. When you set the parameters for the report, you are defining what data will appear in the report (i.e., all pending cases for Don Smith).

Use either of the following procedures to define the range of data encompassed in your report. Both procedures involve using the Search Options tool.

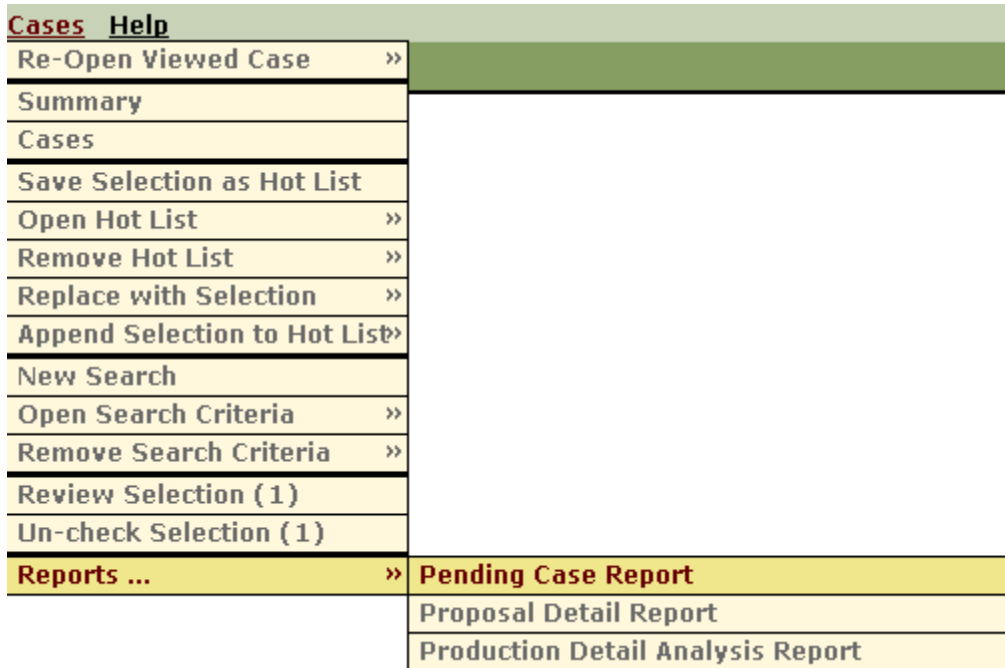
Setting Report Parameters from the Case Summary Tab

1. On the **Case Summary tab**, select either an **Agent/Case Code** or **Insurance Company** on the Search Options tool to define your search.
2. Click **Search**.

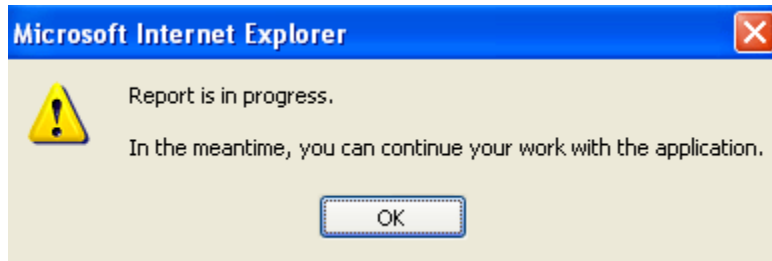
Insurance Company	Case Status	Total Case Assignments
American Real Agency		2
Prudential American Agency		1
West Agency		3

3. To generate a report, **select the report name** from the Reports command on the Cases menu. For example, select "Pending Case Report" from the Cases menu.

The Cases tab will open with a list of all cases with the status Pending. The Report Management Panel will be displayed at the top of the screen.



- To generate the report as it is displayed on the screen, click the **Generate Report** button.



TIP: If you would like to further define sort criteria on the Report Management Panel, refer to *Sorting Data for Reports* for instructions on how to do this.

Setting Report Parameters from the Cases Tab

You can set the scope of the report on the Cases tab using the Search Options tool.

1. Click **Search**.

The screenshot displays the Oracle Insurance Agent Desktop interface. At the top, there is a navigation bar with "My Agency" and "Agent Desktop" on the left, and "CaseView | Cases" on the right. Below this is a secondary navigation bar with "Logout Tools Clients Cases Help" and "Case Summary Cases Case Details".

The main content area is divided into two sections. On the left is the "Search Options" panel, which includes a "SAVE" button and a "Show Report Management Panel" link. Below this are several input fields: "Case Ref. No:", "Agency Name:", "Agent first or last Name:", "Client first or last Name:", "Client Phone:", and "Policy Number:". There are also links for "Case Status", "Office Status", "Case Open Date", and "History Status", along with "RESET" and "SEARCH" buttons.

On the right is a table displaying search results. The table has a header row with columns: "Item", "Hot List", "Policy No.", "Client Name", "Insurance Company", "Agent Name", "Agency Name", "Case Status", "Office Status", "Base Plan", "Face Amount", "Modal Premium", "Payment Mode", "Annualized Premium", "Target Premium", and "Case Open Date". The table contains five rows of data, each representing an insurance policy.

Item	Hot List	Policy No.	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Jhon Doe	Prudential Select Brokerage	Smith Parker	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L111179456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

2. Click **Show Report Management Panel** if it is not already displayed.

My Agency Agent Desktop CaseView | Cases

Logout Tools Clients Cases Help Case Summary Cases Case Details

Search Options SAVE

Inscro

Case Ref. No:

Agency Name:

Agent first or last Name:

Client first or last Name:

Client Phone:

Policy Number:

Case Status

Office Status

Case Open Date

History Status

RESET SEARCH

»» Hide Report Management Panel ««

Report Layout: Proposal Detail Report

Agency Name [in ascending order] Agency Name [in descending order]

Base Plan [in ascending order] Agent Name [in descending order]

Agent Name [in ascending order] Base Plan [in descending order]

Case Status [in ascending order] Case Open Date [in ascending order]

Case Status [in descending order]

Client Name [in ascending order]

Generic Plan [in ascending order]

Insurance Company [in ascending order]

Office Status [in ascending order]

Payment Mode [in ascending order]

Policy No [in ascending order]

UW Class [in ascending order]

Report Sorting:

[Clear Selection] [Reset as Displayed]

Generate Report

««Hide Search Options» ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item	Hot	Policy No	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Smith Parker	Prudential Select Brokerage	Harry Doe	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Smith Parker	West Coast Life	Harry Doe	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L111179456 (Has notes)	Smith Parker	West Coast Life		Example Corp LLC	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

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3. Select the type of report that you would like to generate from the **Report Layout** list. For example, select 'Proposal Detail Report.'
4. To generate the report as it is displayed on the screen, click the **Generate Report** button.

TIP: If you would like to further define sort criteria on the Report Management Panel, refer to *Sorting Data for Reports* for instructions on how to do this.

NOTE After generating a 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.

Sorting Data for Reports

There are several ways to determine the appearance of a report. You can define what data to use for sorting when you set viewing preferences. The data columns that appear on the Cases tab also appear as selections for sorting in the Report Management Panel. You can use these case categories or attributes (i.e., insurance company, case status) as sort selection criteria.

TIP: Refer to *Setting Viewing Preferences* for procedures on how to define which columns of data appear in a report.

You can sort reports using case or agent codes as well. These sort parameters are defined when you specify search criteria with the Search Options tool.

TIP: Refer to *Setting Parameters for Reports* for details about using the 'Search Options' tool to define sorting by case or agent codes.

Report Management Panel

The Report Management Panel allows you to define sorting parameters using case attributes (i.e., agent name, entry date, office status). The Report Management Panel contains two important fields:

- **Report Layout:** This drop-down list allows you to select the type of report you would like to generate: Pending, Proposal Detail or Production Detail Analysis.
- **Report Sorting:** Two list boxes allow you to define your sorting criteria. The list box on the right, with a blue background, contains all the sorting criteria you defined in Setting Viewing Preferences. These criteria appear as columns on the Cases screen. You can click a criteria listing to move it to the list box on the left. Please note that each column listing appears twice as ascending [ASC] or descending [DESC] sort order.

The list box on the left, with a white background, displays which sort criteria you have selected for the report. For example, if Agent Name [ASC], Insurance Company [ASC], and Case Status [ASC] are displayed here, then that means the report will first be sorted by Agent Name, and then within that sort by Insurance Company, and then within that sort as Case Status (all in ascending sort order). Totals for selected search criteria are displayed at the bottom of each case listing.

Sorting Data for Reports

1. First define which case categories you would like available in the report by Setting Viewing Preferences.
2. Define the scope of your report as described in Setting Parameters for Reports. Here you can select case or agent codes to use in the report.
3. On the **Cases** tab, select **Show Report Management Panel** if it does not already appear at the top of the screen.

4. If necessary, select the type of report you would like to generate from the **Report Layout** list.

The Report Sorting field displays sorting criteria as you have defined on the Cases tab. If you would like to change sorting criteria, click Clear Selection.

5. Select sorting criteria from the **Report Sorting** blue field. When you click sorting criteria in the white field, it will move back to the blue field.

NOTE

When you make a selection, it appears in the white field on the left with its opposite value appearing in the blue field. For example, if you select Agent Name [ASC} and move it to the white field, then Agent Name [DESC} appears in the blue field. You can select either one as sorting criteria.

6. When you finish selecting sorting criteria, click **Generate Report**. As the report is generated, the Cases tab will change to reflect the sorting criteria you selected.

TIP: You can click 'Reset as Displayed' to reset your selections to their original value (as displayed on the Cases tab).

Pending Case Report

This report offers you pending case data for a list of cases and offers such details as general agent and client information, case codes, and requirements.

You can generate this report from anywhere within the Agent Desktop system with the Reports command on the Cases menu. Use the Case Summary tab to define the report by Agent Code or Insurance Company, or use the Search Options tool to generate the desired list of cases on the Cases tab.

TIP: Refer to *Setting Parameters for Reports* for more information on defining the scope of your reports.

A Pending Case report generates a list of cases with Pending as the case status. If you selected Agent Code "Don Smith" as your report parameter, then this report will list all pending cases for Agent Code, "Don Smith."

Generating a Pending Case Report from the Cases Tab

1. Open the desired list of cases on which to report on the Cases tab.

My Agency **Agent Desktop** **CaseView | Cases**

Logout Tools Clients Cases Help Case Summary Cases Case Details

Search Options **SAVE** **«** **»**

Insc0

Case Ref. No:

Agency Name:

Agent first or last Name:

Client first or last Name:

Client Phone:

Policy Number:

Case Status

Office Status

Case Open Date

History Status

RESET **SEARCH**

« Show Report Management Panel »»

« Hide Search Options » ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item List	Hot	Policy No »	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Jhon Doe	Prudential Select Brokerage	Smith Parker	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L1111179456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

2. If necessary, select **Show Report Management Panel**, and then select **Pending Case Report** from the Report Layout list.

My Agency Agent Desktop CaseView | Cases

Logout Tools Clients Cases Help Case Summary Cases Case Details

Search Options SAVE

Inscro

Case Ref. No:

Agency Name:

Agent first or last Name:

Client first or last Name:

Client Phone:

Policy Number:

Case Status

Office Status

Case Open Date

History Status

RESET SEARCH

»» Hide Report Management Panel ««

Report Layout: Pending Case Report

Agency Name [in ascending order] Agency Name [in descending order]

Base Plan [in ascending order] Agent Name [in descending order]

Agent Name [in ascending order] Base Plan [in descending order]

Case Status [in ascending order] Case Open Date [in ascending order]

Case Status [in descending order]

Client Name [in ascending order]

Generic Plan [in ascending order]

Insurance Company [in ascending order]

Office Status [in ascending order]

Payment Mode [in ascending order]

Policy No [in ascending order]

UW Class [in ascending order]

Report Sorting:

[Clear Selection] [Reset as Displayed]

Generate Report

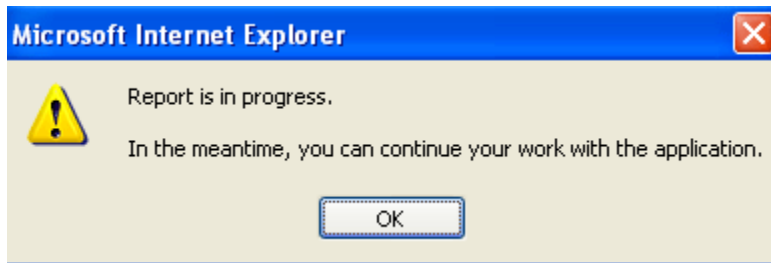
««Hide Search Options» ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item List	Hot	Policy No	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Smith Parker	Prudential Select Brokerage	Harry Doe	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Smith Parker	West Coast Life	Harry Doe	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L1111179456 (Has notes)	Smith Parker	West Coast Life		Example Corp LLC	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

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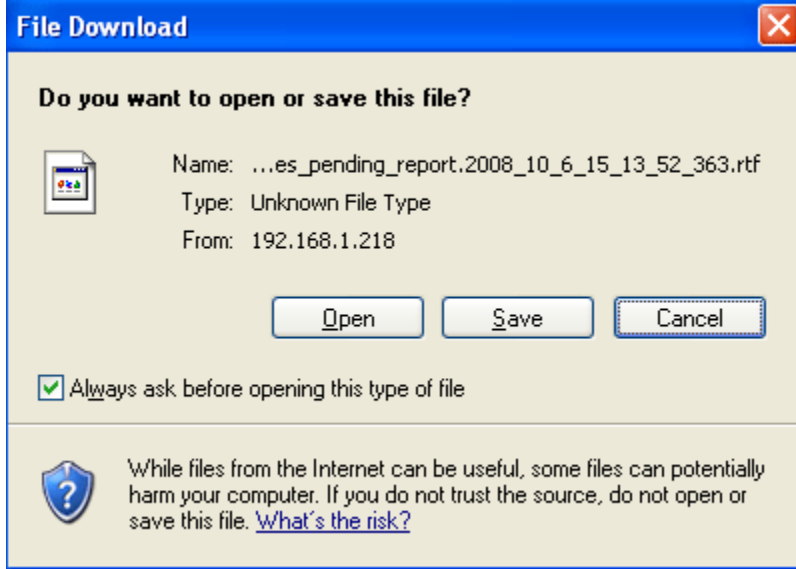
3. Confirm that you have selected the correct sorting criteria in the Report Sorting field.
4. Click **Generate Report**.



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.

Saving to File



1. Click **Save** to save the report to your computer.
2. The **Save As** dialog appears.
3. Select a name and location for this file on your computer and click **Save**.

The report will be saved to your computer. You can now edit the contents as desired or send as an email attachment.

NOTE

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

Production Detail Analysis Report

This report offers you case analysis for selected cases. The report lists such details as agent name, client name, case status, face amount and premium details.

You can generate this report from anywhere within the Agent Desktop system with the Reports command on the Cases menu. Use the Case Summary tab to define the report by Agent Code or Insurance Company, or use the Search Options tool to generate the desired list of cases on the Cases tab.

A Production Detail Analysis report generates a list of cases with All Codes as the case status. If you selected Agent Code "Don Smith" as your report parameter, then this report will list all cases for Agent Code, "Don Smith."

Generating a Production Detail Analysis Report

1. Open the desired list of cases on which to report on the Cases tab.

My Agency
Agent Desktop
CaseView | Cases

Logout Tools Clients Cases Help Case Summary Cases Case Details

Search Options SAVE

Inscro

Case Ref. No:

Agency Name:

Agent first or last Name:

Client first or last Name:

Client Phone:

Policy Number:

Case Status

Office Status

Case Open Date

History Status

RESET SEARCH

« Show Report Management Panel »

« Hide Search Options » ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item	Hot List	Policy No. »	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Jhon Doe	Prudential Select Brokerage	Smith Parker	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L1111179456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

2. If necessary, select **Show Report Management Panel**, and then select **Production Detail Analysis Report** from the Report Layout list.

My Agency Agent Desktop CaseView | Cases

Logout Tools Clients Cases Help Case Summary Cases Case Details

Search Options SAVE

Inscro

Case Ref. No:

Agency Name:

Agent first or last Name:

Client first or last Name:

Client Phone:

Policy Number:

Case Status

Office Status

Case Open Date

History Status

RESET SEARCH

»» Hide Report Management Panel ««

Report Layout: Production Detail Analysis Report

Agency Name [in ascending order] Agency Name [in descending order]

Base Plan [in ascending order] Agent Name [in descending order]

Agent Name [in ascending order] Base Plan [in descending order]

Case Status [in ascending order] Case Open Date [in ascending order]

Case Status [in descending order]

Client Name [in ascending order]

Generic Plan [in ascending order]

Insurance Company [in ascending order]

Office Status [in ascending order]

Payment Mode [in ascending order]

Policy No [in ascending order]

UW Class [in ascending order]

Report Sorting:

[Clear Selection] [Reset as Displayed]

Generate Report

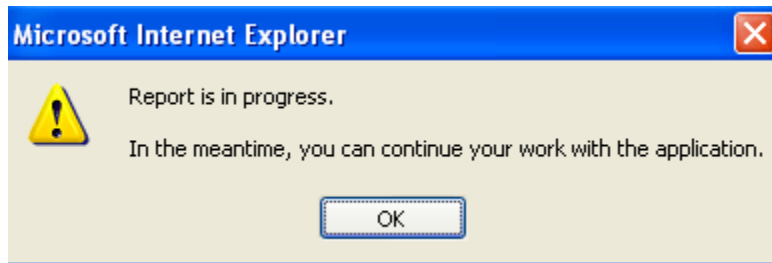
««Hide Search Options» ITEMS FOUND: 6 Items per Page: 5 Page 1 of 2

<-- Check this box to set the first sorting column

Item List	Policy No	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1 <input type="checkbox"/>	L123289566 <small>(Has notes)</small>	Smith Parker	Prudential Select Brokerage	Harry Doe	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2 <input type="checkbox"/>	L124289456 <small>(Has notes)</small>	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3 <input type="checkbox"/>	L127779456 <small>(Has notes)</small>	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4 <input type="checkbox"/>	L127779456 <small>(Has notes)</small>	Smith Parker	West Coast Life	Harry Doe	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5 <input type="checkbox"/>	L1111179456 <small>(Has notes)</small>	Smith Parker	West Coast Life		Example Corp LLC	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

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3. Confirm that you have selected the correct sorting criteria in the **Report Sorting** field.
4. Click **Generate Report**.



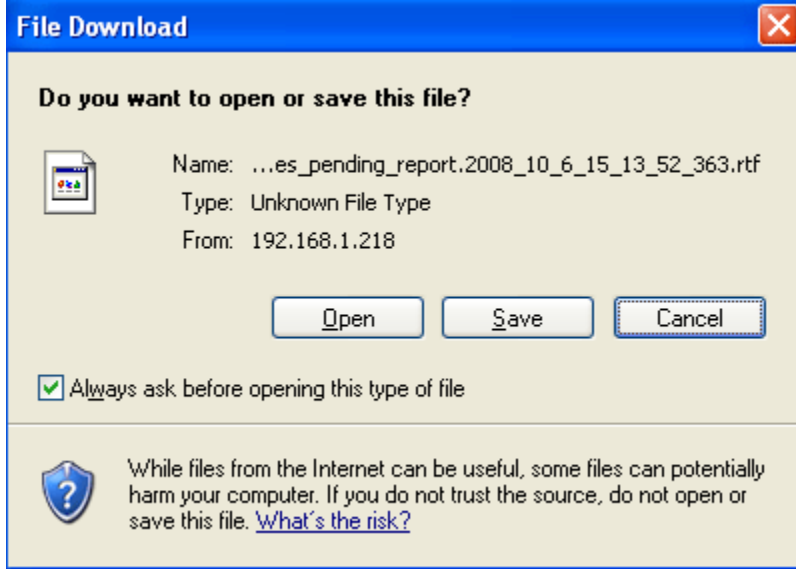
One of the following two actions can happen, depending upon the configuration of your browser:

- 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.

Saving to File



1. Click **Save** to save the report to your computer.
2. The **Save As** dialog appears.
3. Select a name and location for this file on your computer and click **Save**.

The report will be saved to your computer. You can now edit the 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.

Proposal Detail Report

This report offers you proposal details for a list of cases and offers such details as number of proposal cases, number of illustrations, annualized premium, face amount, and averages for illustration, case, face amount and premium.

You can generate this report from anywhere within the Agent Desktop system with the Reports command on the Cases menu. Use the Case Summary tab to define the report by Agent Code or Insurance Company, or use the Search Options tool to generate the desired list of cases on the Cases tab.

A Proposal Detail report generates a list of cases with Proposal as the case status. If you selected Insurance Company "ManuLife Financial" as your report parameter, then this report will list all proposal cases for Insurance Company, "ManuLife Financial."

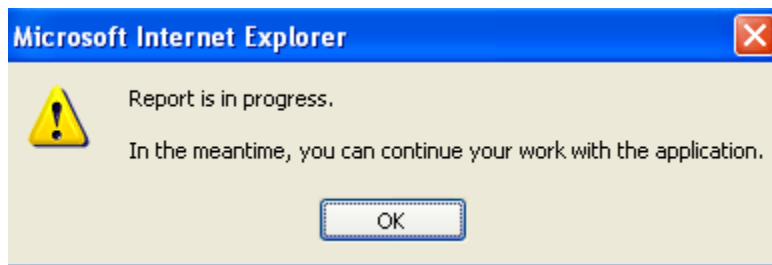
Generating a Proposal Detail Report

1. Open the desired list of cases on which to report on the Cases tab.

The screenshot shows the Oracle Insurance Agent Desktop interface. At the top, there are navigation tabs: 'My Agency', 'Agent Desktop', and 'CaseView | Cases'. Below this is a menu bar with 'Logout', 'Tools', 'Clients', 'Cases', and 'Help'. The 'Cases' tab is active, showing a 'Case Summary' sub-tab. On the left, there is a search panel with fields for 'Case Ref. No.', 'Agency Name', 'Agent first or last Name', 'Client first or last Name', 'Client Phone', and 'Policy Number'. There are also buttons for 'RESET' and 'SEARCH'. The main area displays a table of cases with columns: Item, Hot List, Policy No., Client Name, Insurance Company, Agent Name, Agency Name, Case Status, Office Status, Base Plan, Face Amount, Modal Premium, Payment Mode, Annualized Premium, Target Premium, and Case Open Date. The table contains five rows of data.

Item	Hot List	Policy No.	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input type="checkbox"/>	L123289566 (Has notes)	Jhon Doe	Prudential Select Brokerage	Smith Parker	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input type="checkbox"/>	L124289456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	American General Financial Gro	Smith Parker	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input type="checkbox"/>	L127779456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008
5	<input type="checkbox"/>	L1111179456 (Has notes)	Jhon Doe	West Coast Life	Smith Parker	Example Corp	Inforce		Focus Term-10	1,000,000	272.13		3,265.56	0.00	07/01/2008

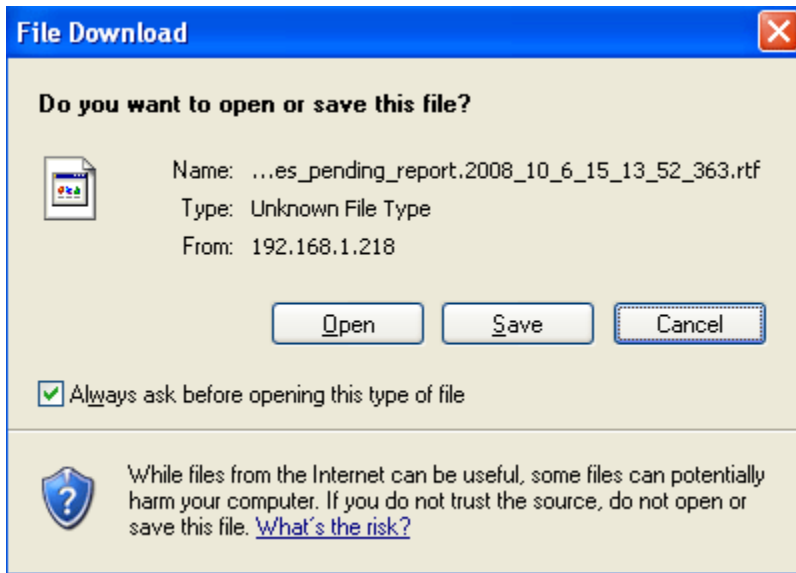
2. If necessary, select **Show Report Management Panel**, and then select **Proposal Detail Report** from the Report Layout list.
3. Confirm that you have selected the correct sorting criteria in the **Report Sorting** field.
4. Click **Generate Report**.



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.

Saving to File



1. Click **Save** to save the report to your computer.
2. The **Save As** dialog appears.
3. Select a name and location for this file on your computer and click **Save**.

The report will be saved to your computer. You can now edit the 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.

Case Details Report

Open a case on the Case Details tab to generate a report about the particular details of an individual case.

NOTE

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

Generating a Case Details Report

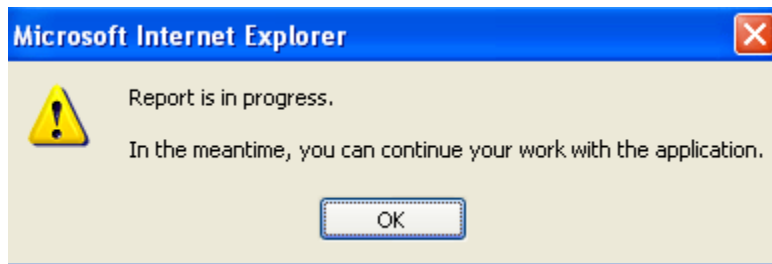
1. Open the desired case on which to report on the **Case Details** tab.
2. The case opens on the Case Profile screen. You can generate this report from any of the case screens.

The screenshot shows the 'My Agency Agent Desktop' interface. The top navigation bar includes 'Logout', 'Tools', 'Clients', 'Cases', and 'Help'. The 'CaseView | Cases' section is active, with sub-tabs for 'Case Summary', 'Cases', and 'Case Details'. The main content area displays case information for Client Name: Jhon Doe, including Policy No / Ref No: U8754233, Agency Name: American Agency, Agent Name: Rose Parker, and Insco Name: Prudential Select Brokerage. Below this, there are sections for 'INSURED' and 'PAYERS' with associated tables. On the left sidebar, a 'PRINT DETAILS' button is highlighted with a red circle.

First Name	Last Name	SSN	Age	Is Primary	
Jhon	Doe	111-111-1111	34	Yes	Show details

Name	SSN	Trust Date	Relationship	
Jhon Doe	111-111-1111			Show details

3. Click the Print Details button on the left side of the screen.



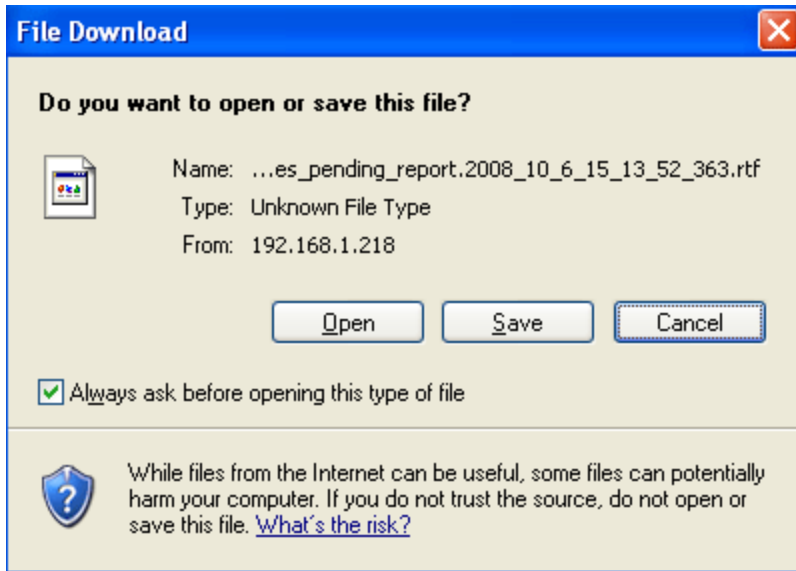
One of the following two actions can happen, depending upon the configuration of your browser:

- 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.

Saving to File



1. Click **Save** to save the report to your computer.
2. The **Save As** dialog appears.
3. Select a name and location for this file on your computer and click **Save**.

The report will be saved to your computer. You can now edit the contents as desired or send as an email attachment.


Working with Hot Lists

A Hot List is a set of records that you have selected to track as a specific list. You can create Hot Lists for a set of either case or client records and group them together for quick and easy access whenever you log in Agent Desktop.

NOTE

You can add a maximum number of ten policies or clients to a Hot List. You can only build Hot Lists for either cases or clients. You cannot mix the two types of records together.

Building a Hot List involves these steps:

- **Locate the policies or clients you want added to the Hot List:** You can add records to a Hot List either from list or detail screens.
- **Use the red checkmark  to add policies to the list you are building:** You can go to several different screens and add records to the same selection list. Just be sure to select the red checkmark to add selections to the list before exiting to another screen.
- **Name and save your Hot List:** Once you add all of the desired policies to the selection list, you then need to save the list and name it for future reference.

TIP: Use the "Review Selection" command on the Cases or Clients menu if you want to review your selection list. When you click this command, the "Review" tab appears with the list of policies or clients you have marked for Hot List selection. After reviewing this list, you can save it or continue adding or removing policies.

As you build your Hot List, you can add or remove policies as desired. Once you complete the process, you will name and save the Hot List for future reference. You can then access the Hot List from the Cases or Clients menu (depending on whether it is a Case Hot List or Client Hot List) at any time.

Working with Hot Lists

All Hot Lists that you create will appear as a sub-menu under the command **Open Hot List** on the Cases or Clients menu. When you select the name of one of your Hot Lists, that list opens on the Cases or Clients tab.


You can also remove a Hot List from the Cases or Clients menu. Select the command **Remove Hot List** and choose the name of the Hot List that you would like to remove.

It is possible to add a single record to an existing Hot List. Refer to Adding a Record to a Hot List for more details.

Building a Hot List for Cases

You can access Hot Lists from the Cases menu and have all of these records displayed with one click of the mouse.


Building a Hot List for Cases

1. Locate the policies you want added to the Hot List. You can add these policies to a Hot List in either of these ways:
 - On the Cases tab, select the check box next to each policy listing that you would like to add to a new Hot List. With this selection screen still open, click the red checkmark  in the column heading to add these policies to the selection list. The system highlights the check box of all policies that have been added to the selection list.
 - On the Case Details tab, select **Add to selected** in the upper-left corner of the screen.



The screenshot displays the Oracle Insurance Agent Desktop interface. At the top, there is a navigation bar with "My Agency" and "Agent Desktop" on the left, and "CaseView | Cases" on the right. Below this is a secondary navigation bar with "Logout Tools Clients Cases Help" and "Case Summary Cases Case Details". The main content area is divided into a left sidebar and a main panel. The sidebar contains a "Remove selected" button, a "CASE:" label, a "CLIENT: Doe, Jhon" field, and several menu items: "Case Profile", "Owner(s)", "Payer(s)", "Requirement Status", "Case Notes", and "Illustrations". A "PRINT DETAILS" button is also visible. The main panel displays case details for "Jhon Doe", including Client Name, Case Status (Inforce), Policy No / Ref No (U8754233), Agency Name (American Agency), Agent Name (Rose Parker), Insc Name (Prudential Select Brokerage), Plan (Essential 30), Generic Plan (30 Year Level Term), Face Amount (\$US) (750,000), Modal Premium (\$US) (175.28), LW Class Requested, and Annualized Premium (\$US) (762.31). Below the case details are two tables: "INSUREDS" and "PAYERS". The "INSUREDS" table has columns for First Name, Last Name, SSN, Age, and Is Primary, with one row for Jhon Doe. The "PAYERS" table has columns for Name, SSN, Trust Date, and Relationship, with one row for Jhon Doe. At the bottom of the screen, there is a footer with "User: Test Test" on the left and "© 2003-2006 Skywire Software. All rights reserved" on the right.

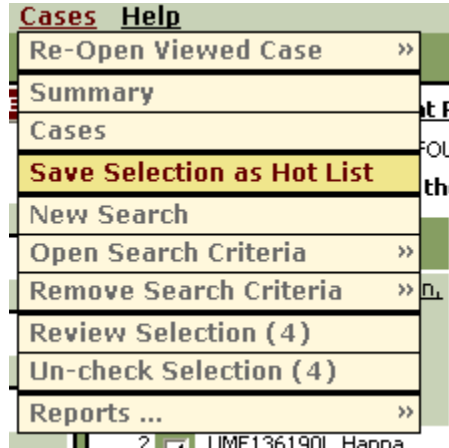
2. If necessary, search for policies on other screens that you would like added to the Hot List. Add them as specified in **Step 1**.

TIP: Select "Review Selections" on the Cases menu if you would like to review the list of policies you have chosen for the Hot List. The "Review" tab will be displayed with the list of policies and each check box selected. If you would like to remove one of these policies from the list, de-select the check box next to the policy and click the red checkmark  in the column heading.

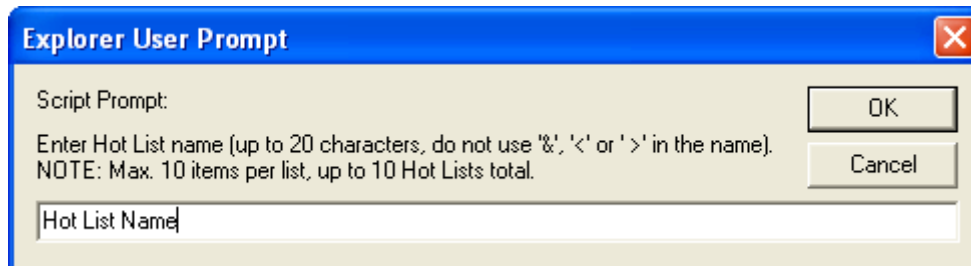
NOTE

You can have a maximum number of ten policies for a Hot List.

- When you finish making selections, select **Save Selection as Hot List** from the Cases menu.



- The Explorer User Prompt dialog will be displayed. Type a short description (up to 20 characters) for your Hot List and click **OK**.



This Hot List description will appear under **Open Hot Lists** on the Cases menu. You will select this description in the future whenever you want to access this list.


TIP: You can also remove a single policy from a selection list on the Details tab.

Building a Hot List for Clients

You can access Hot Lists from the Clients menu and have all of these records displayed with one click of the mouse.

Building a Hot List for Cases

- Locate the clients you want added to the Hot List. You can add these clients to a Hot List in either of these ways:

- On the Clients tab, select the check box next to each client listing that you would like to add to a new Hot List. With this selection screen still open, click the red checkmark  in the column heading to add these client records to the selection list. The system highlights the check box of all clients that have been added to the selection list.
- On the Client Details tab, select **Add to selected** in the upper-left corner of the screen.



My Agency **Agent Desktop** **CaseView | Cases**

Logout Tools Clients Cases Help Case Summary Cases Case Details

Remove selected

CASE: Client Name: Jhon Doe
CLIENT: Doe, Jhon Case Status: Inforce
Policy No / Ref No: U8754233
Agency Name: American Agency
Agent Name: Rose Parker
Insko Name: Prudential Select Brokerage
Plan: Essential 30
Generic Plan: 30 Year Level Term
Face Amount (\$US): 750,000
Modal Premium (\$US): 175.28
UW Class Requested:
Annualized Premium (\$US): 762.31

Case Profile
Owner(s)
Payer(s)
Requirement Status
Case Notes
Illustrations

PRINT DETAILS

INSURED5


First Name	Last Name	SSN	Age	Is Primary	
Jhon	Doe	111-111-1111	34	Yes	Show details

PAYERS

Name	SSN	Trust Date	Relationship	
Jhon Doe	111-111-1111			Show details

User: Test Test © 2003-2006 Skywire Software. All rights reserved

2. If necessary, search for clients on other screens that you would like added to the Hot List. Add them as specified in **Step 1**.

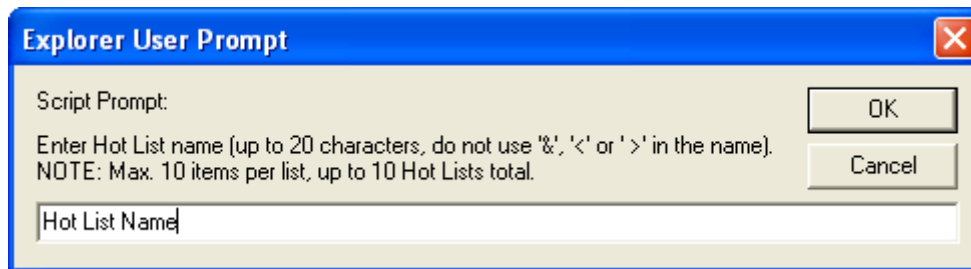
TIP: Select "Review Selections" on the Clients menu if you would like to review the list of policies you have chosen for the Hot List. The "Review" tab appears with the list of clients and each check box selected. If you would like to remove one of these policies from the list, de-select the check box next to the policy and click the red checkmark  in the column heading.

NOTE You can have a maximum number of ten policies for a Hot List.

3. When you finish making selections, select **Save Selection as Hot List** from the Clients menu.



4. The Explorer User Prompt dialog will be displayed. Type a short description (up to 20 characters) for your Hot List and click **OK**.



This Hot List description will appear under **Open Hot Lists** on the Clients menu. You will select this description in the future whenever you want to access this list.

TIP: You can also remove a single policy from a selection list on the Details tab.

Accessing a Hot List

A Hot List is a set of policy or client records that you have selected to track as a specific list. You can identify important cases or clients and group them together for quick and easy access whenever you log in Agent Desktop.

NOTE

Refer to either Building a Hotlist for Cases or Building a Hotlist for Clients for instructions on how to add records to a Hot List.

Accessing a Hot List

1. From the Cases or Clients menu, place your cursor over the **Open Hot List** command. A sub-menu of all available Hot Lists appears to the right of the main menu.

Cases Help	
Re-Open Viewed Case >>	
Summary	at Panel >>>]
Cases	FOUND: Items per Page: Page 1 of 1
Save Selection as Hot List	the first sorting column
Open Hot List >>	save -- 4
Remove Hot List >>	Hot List Name -- 4
Replace with Selection >>	
Append Selection to Hot List>	
New Search	
Review Selection (2)	
Un-check Selection (2)	
Reports ... >>	

2. **Select the name** of the Hot List you would like to access.

The list of records contained in the selected Hot List will open on the Cases or Clients tab. The name of the selected Hot List appears as a sub-title on the main tab.

Adding a Record to an Existing Hot List


In the course of your business, you may decide to add a policy or client to an existing Hot List. You can do so from the Cases, Clients, Case Details or Client Detail tab. Use one of the following procedures below.

NOTE

You can have a maximum number of ten policies assigned to a Hot List.

Adding a Record to an Existing Hot List from a Details Tab


1. Open the record on the **Case Details or Client Details** tab.
2. In the upper-left corner of the screen, click **Add to selected**.

A red checkmark  will be displayed in the upper-left corner of the screen to indicate that you have selected this policy for a Hot List. Next you must save the record to the existing Hot List.

3. From the Cases or Clients menu, select the **Append Selection to Hot List** command and select the Hot List where you would like to add this policy.

The record will be added to the selected Hot List.

Adding a Record to an Existing Hot List from a Cases or Clients Tab

1. Find the record to add on the **Cases or Clients** tab.
2. Select the check box next to the record on the left side of the screen.
3. Click the red checkmark  in the column heading to mark this policy for addition to a Hot List.

Item	Hot List	Policy No »	Client Name	Insurance Company	Agent Name	Agency Name	Case Status	Office Status	Base Plan	Face Amount	Modal Premium	Payment Mode	Annualized Premium	Target Premium	Case Open Date
1	<input checked="" type="checkbox"/>	L123289566 (Has notes)	Smith Parker	Prudential Select Brokerage	Harry Doe	Example Corp	Inforce		Essential 30	750,000	175.28	Monthly Auto	762.31	0.00	04/01/2008
2	<input checked="" type="checkbox"/>	L124289456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	1,000,000	1,044.46		4,177.84	0.00	07/14/2008
3	<input checked="" type="checkbox"/>	L127779456 (Has notes)	Smith Parker	American General Financial Gro	Harry Doe	Example Corp	Inforce		AGL ContinUL Extend	500,000	1,150.91		4,603.64	0.00	07/14/2008
4	<input checked="" type="checkbox"/>	L127779456 (Has notes)	Smith Parker	West Coast Life	Harry Doe	Example Corp	Inforce		Focus Term-30	1,500,000	124.69		1,496.28	0.00	07/14/2008

The system will highlight the check box of the policy. This indicates that the policy is ready to be added to a Hot List.

4. From the Cases or Clients menu, select the **Append Selection to Hot List** command and select the Hot List where you would like to add this policy.

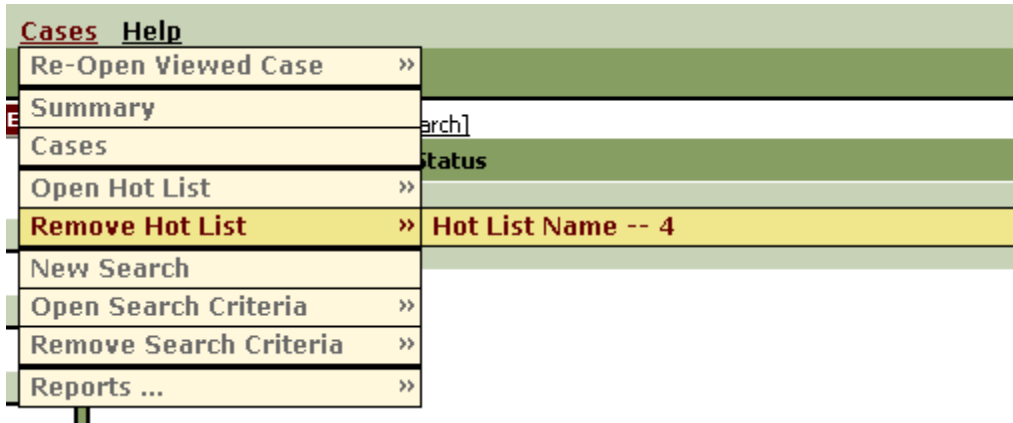
The record will be added to the selected Hot List.

Deleting a Hot List

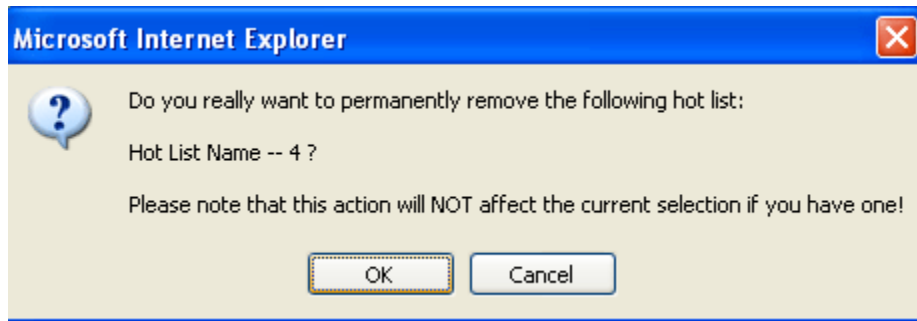
When a Hot List is no longer needed, it can be deleted. A Hot List can be deleted at any time.

Deleting a Hot List

1. From the **Cases** or **Clients** menu, place your cursor over the **Remove Hot List** command. A sub-menu of all available Hot Lists will be displayed to the right of the main menu.



2. Select the **name of the Hot List** you would like to delete. A confirmation message will be displayed.



3. Select **OK** to delete the Hot List. Select Cancel to return to the previous screen without deleting the Hot List.

Support

If during the installation or configuration of Oracle Insurance General Agent you receive an error or need a question answered, please contact Oracle Insurance Support at support-skywire_ww@oracle.com.

Address any additional inquiries to:

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Redwood Shores, CA 94065
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