USER MANUAL FOR

www.riskpartner.com

RiskPartner, LLC

5100 East Skelly Drive, Suite 900

Tulsa, OK 74135

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CONTENTS

ROLES & RESPONSIBILITIES

ADMINISTRATORS

User Access

Administrators are responsible for maintaining User access. The Archdiocese of Seattle has 2 user roles:

- Administrators
- Portal Members

Email addresses will be used as Login IDs for all Archdiocese Users. Users Access will be maintained at the group level.

Organizational Hierarchy

Administrators will maintain Division and Location records in RiskPartner.

Exposure Items/Renewal

Administrators are ultimately responsible for all exposure data. Exposure can be modified at any time directly from the exposure record. The Archdiocese of Seattle tracks the following exposure items within RiskPartner:

- Locations
- Buildings
- Vehicles
- Doctor Schedules – For limited Locations
- # of FTEs – Listed as a Location Value

DATA COLLECTION VALIDATION

Administrators are responsible for monitoring and validating pending changes to exposures (data collection records) submitted by portal users. This can be done

IMPORT WIZARD

Administrators may also edit exposure items en masse via RiskPartner's Import Wizard. This will be the standard process for updating the following:

- Premium amounts for buildings during the allocation process
- Premium amounts for vehicles during the allocation process
- FTE information on the Location Record

Premium Allocation

Administrators are responsible for allocation of premiums within RiskPartner which includes running premium calculation reports to figure out and enter rates, then using the adjusted rates to calculate premiums for buildings and vehicles and upload those along with FTE values per location via the Import Wizard to produce the Premium Allocation Summary Report.

RATES

Administrators will be responsible for updating allocation rates for Autos, CCAS Expenses, GL, and Property.

CALCULATE BUILDING AND VEHICLE PREMIUMS

Once the determined rates have been entered, Administrators will run the Building and Vehicle Premium Exports to calculate Premiums per exposure item.

UPDATE PREMIUM INFORMATION ON EXISTING EXPOSURE RECORDS

Once the premiums have been calculated for buildings and vehicles, administrators will utilize the Import Wizard to update the premium values on the exposure records.

UPLOAD THE RESULTS OF THE PREMIUM ALLOCAITON TO INVOICES

At this time, Administrators will provide this data to RiskPartner for upload.

INVOICING

Administrators will be responsible for adjusting, printing, and distribution of invoices to Archdiocese locations. A PDF of each invoice created should be uploaded as a linked document for historic purposes.

POLICIES

Administrators are responsible for the following information in RiskPartner:

- Entering New Policies
- Maintaining Existing Policies
- Policy Renewal
- Maintaining Carrier records

REPORTS

Administrators are responsible for reporting and data output which may consist of:

- Creating Queries
- Creating Dashboards
- Running Reports
- Running Exports

Below is a list of reports the Archdiocese runs on a regular basis.

- Need Report Table Here

PORTAL USERS

Portal users are responsible for submitting changes to exposure data for locations to which they have been assigned.

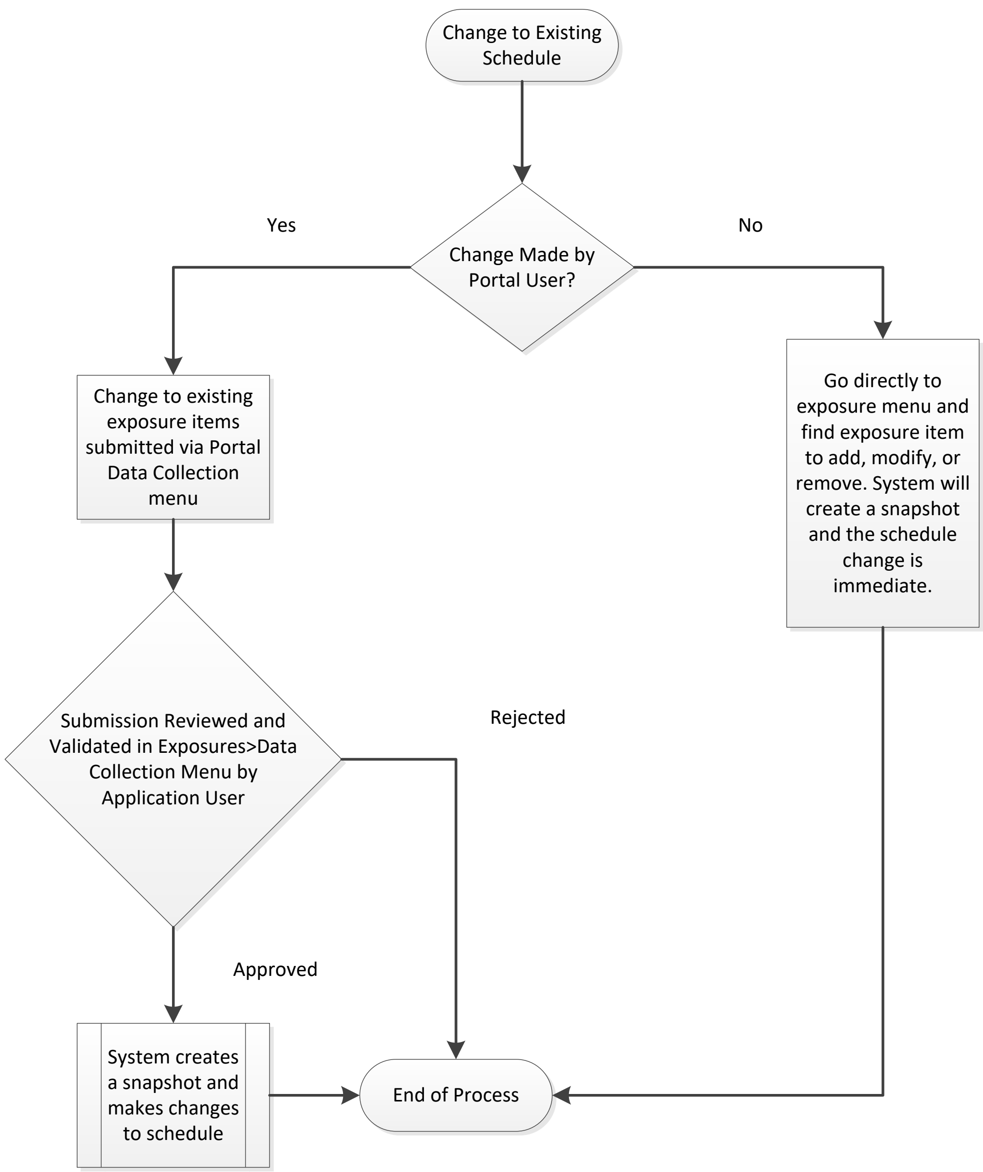
DATA COLLECTION

Portal users will utilize the data collection module via the portal to submit changes to exposures.

HIGH LEVEL PROCESS WORKFLOW

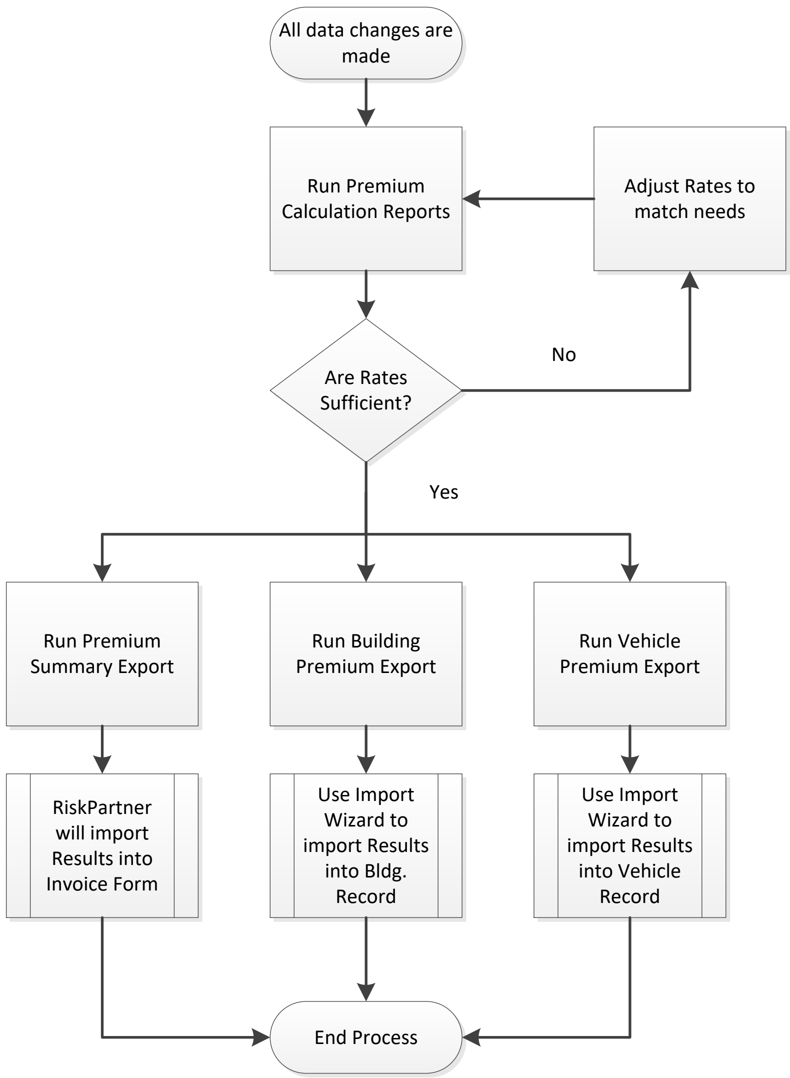
STEP 1 - RENEWAL

Members will submit changes using the RiskPartner Data Collection portal. Administrators can modify exposure items directly, approve changes made by portal users, or change data en masse using the RiskPartner Import Wizard.



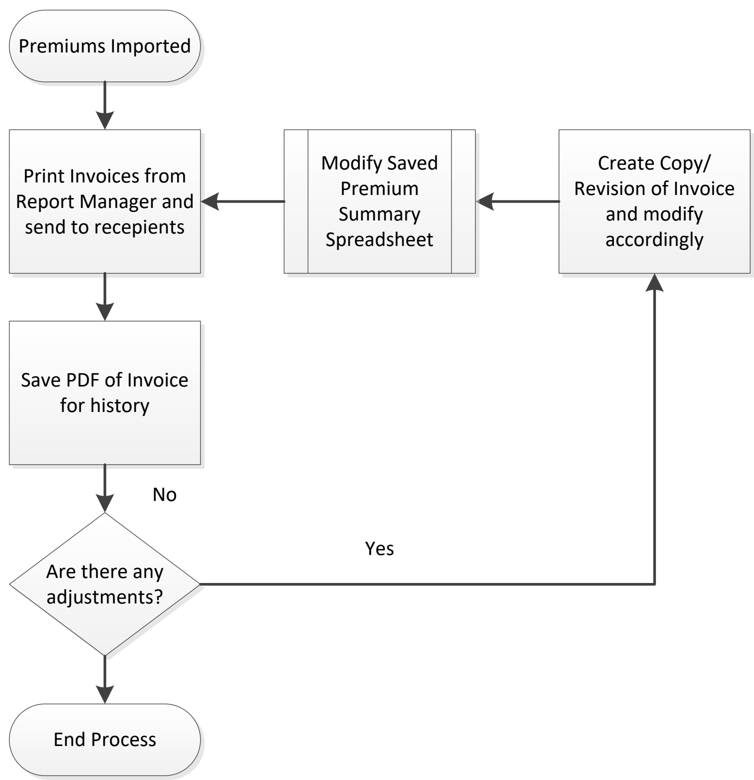
STEP 2 - PREMIUM ALLOCATION CALCULATIONS

Administrators will run premium calculation reports and adjust rates in a loop until the desired rates are determined. Then the Building Premium, Vehicle Premium, and Premium Summary reports will be run to produce excel documents which will then be imported using the RiskPartner Import Wizard for building and vehicle premiums while RiskPartner will import the results of the Premium Summary into RiskPartner invoice forms.



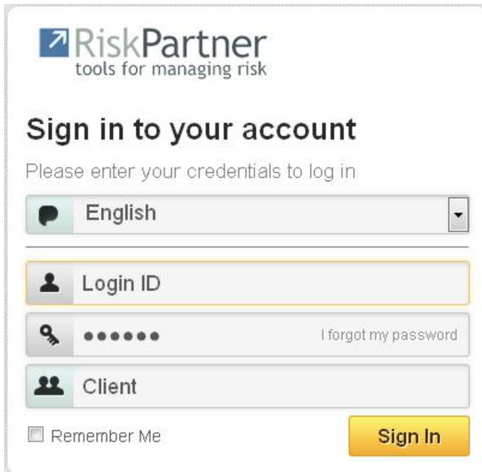
STEP 3 – INVOICING

Once RiskPartner has imported the Policy Summary into Invoice Forms, forms can be edited (copied and given a revision number) to add discounts or reflect any changes needed before printing and dissemination to the locations. Each time an invoice is printed it grabs live information from active building and vehicle records, so it is important to upload the PDF as a linked document each time an invoice is printed.



GENERAL NAVIGATION

LOGIN AND LOGOUT

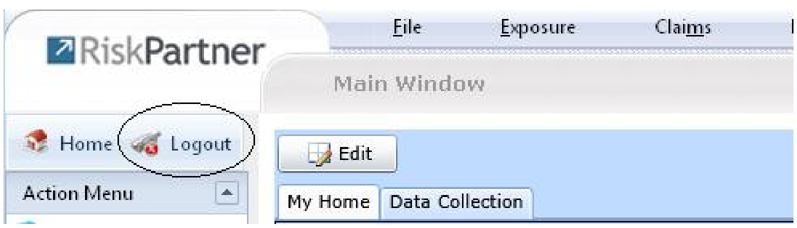


The login URL for RiskPartner is http://login.riskpartner.com. Archdiocese of Seattle will use email addresses as user Login IDs. Passwords will be provided for admin and system users. Portal users will be set to password and will be forced to change the password upon first login. The client name is Archdiocese of Seattle.

If you check the *Remember Me* check box, retains your information. Just enter the first letter of your ID and select the rest from the drop-down. RiskPartner completes the Password. Finally, type the first letter or letters for the Client name and select it.

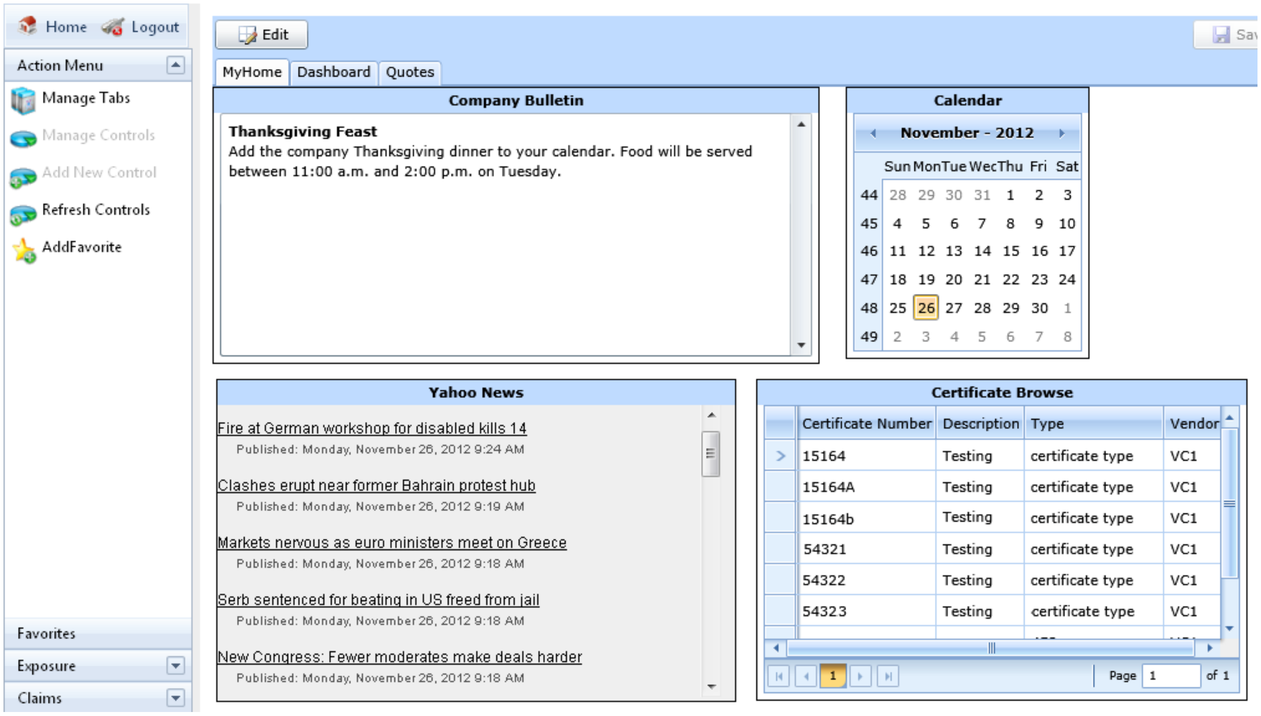
Press Enter or click the *Sign In* button to open the application.

LOGOUT



Be certain to **click the Logout icon** when you exit the application. Merely clicking the X in the upper right corner of the window makes it possible to remain logged in to the database. If someone else uses the application later, any changes they make are attributed to your login identification.

MYHOME



Once you have logged in, the first page that appears is MyHome. This page displays information relevant to your work. Each person who logs in can have a different configuration on this page including:

- Bulletin
- Browse Lists
- Pie & Bar Charts
- Digital Dials
- Digital Gauges

At the left of the page is the Navigation pane, which includes the *Home* and *Logout* buttons, the *Action Menu*, and sections that relate to Menu selections, i.e., shortcut links to open various windows rather than using the Menu. You can also add your frequently opened window to the *Favorites* section of the Navigation pane.

LAUNCHING RISKPARTNER MODULES

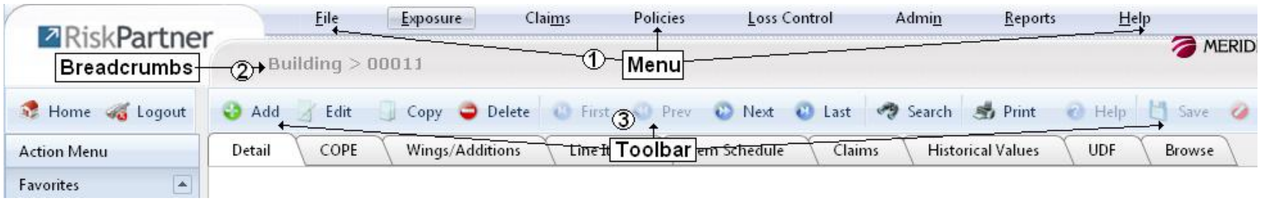
The RiskPartner MyPage window is the first page to display following a successful login.

You have two options to open a RiskPartner module. You can use either of the following:

- RiskPartner Menu
- Navigator Pane Sections

Various elements of the window are defined in the topics Menu and Toolbar below, Navigation Pane on page 16, and Window Tour on page 18.

MENU AND TOOLBAR



The RiskPartner menu (1) displays at the top of all windows. It is similar to menus in other Microsoft Windows applications. The menu path to a window is cited in the online help files and the RiskPartner Help documents.

Breadcrumbs (2) show the name of the window and the specific record a user has selected. This reference displays above the RiskPartner toolbar.

The Toolbar (3) is used to perform various tasks to create, edit, locate, or save records in the database. Use the directional arrows (First, Prev, Next, and Last) to navigate forward and backward through the records related to the window that is open.

Although the toolbar includes a Delete function, it is **never advisable** to delete records. RiskPartner provides mechanisms that help prevent deletion, such as limitations in user privileges. However, even those users that have deletion privileges should not use them without first getting an opinion from RiskPartner Customer Service.

Most windows have an *Active* check box that helps you maintain the integrity of the database but remove the record from list boxes. That does not mean the record has been deleted. Do not attempt to delete records of any kind — make this a practice in your organization.

NAVIGATION PANE

The pane at the left side of the RiskPartner window is a fast way to launch a window. At the bottom of this pane, click the name of the related menu to display a new set of icons. Click the desired function icon on the pane to launch the window.

ACTION MENU

The Action Menu section on the navigator pane is used throughout the RiskPartner application. It changes with each module.

The Action Menu contents reflect procedures related to the current window. For example, the Action Menu for the *Assets* window (*Exposure > Property >Assets*) includes the following links:

- Linked Documents
- Last Modified
- Value Index Update
- Create Change Request
- Add Favorite / Remove Favorite

The Common Functions document found at *Help > Help Page > Common Functions* includes more information about using the Action Menu options.

HOW TO ADD FAVORITES

When you find you open particular modules on a regular basis, you can add it to the Favorites section. The *Favorites* section is located just below the *Action Menu*.

To add a link to the *Favorites* section:

1. Open the window you want to add, for example, follow the menu path *Exposure > Property > Building*.

2. Click *Action Menu* on the Navigation pane.

3. Click the *Add Favorite* link on the Action Menu. Notice that the link now reads *Remove Favorite*.

When you click *Favorites* on the Navigation pane, your new link is displayed.

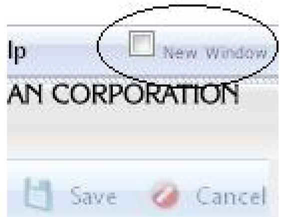
If the *Favorites* section gets crowded with unused links, repeat the steps listed above. When you click *Remove Favorite*, the link is deleted from the *Favorites* section.

NAVIGATION TIPS

Home and Logout are found above the navigator pane at the left side of the RiskPartner window.

Click *Home* to return to MyPage from any window.

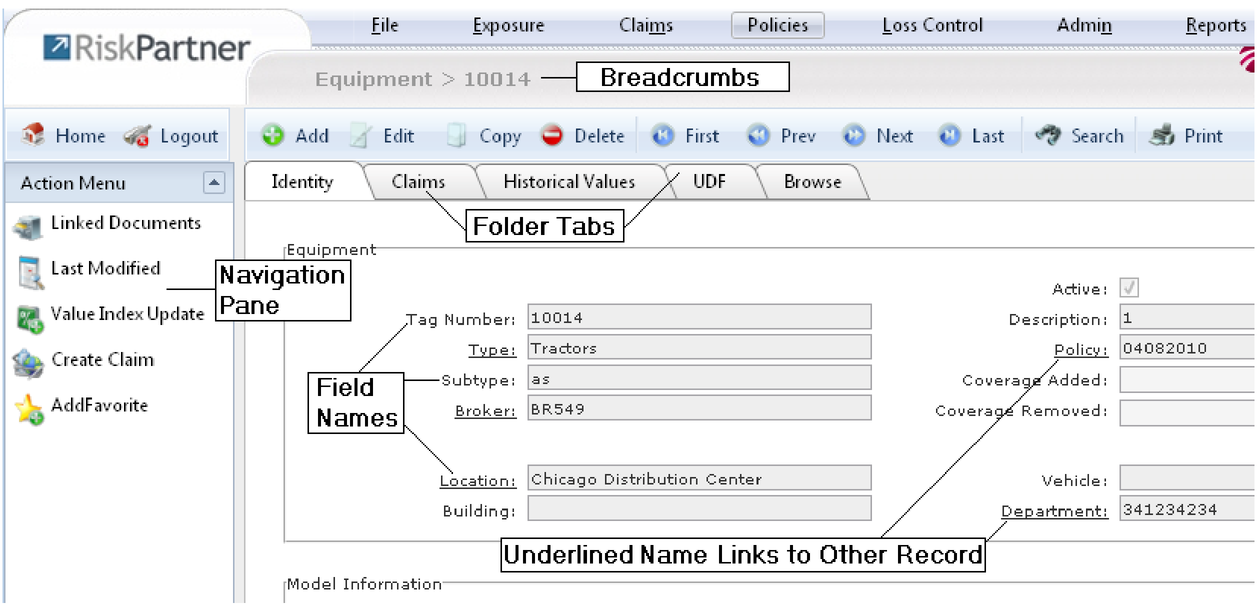
Click *Logout* to close the application.



The *New Window* check box located at the far right of the menu bar is always available to launch another module in an additional browser window. This allows you to keep one record open while reviewing related information in a different window.

For example, if you are working in the *Equipment* window and want to review a location record, click the *New Window* check box before you open the *Location* window. The equipment record displays in the original browser window, and the location record is in a new browser window. If you mark the *New Window* check box on the second window and go to another window, a third browser window opens.

WINDOW TOUR



Breadcrumbs	The name of the selected function and the tag number or ID of the displayed record.
Folder Tabs	Tabs that open windows containing optional fields of information related to the record. Click a Folder Tab to see the information.
Field Names	The assigned name or label for a field that occurs in every record for the selected function. Some fields can be renamed by the RiskPartner System Administrator.

Underlined Field Names	An underlined field name indicates a link to the record displayed in the field. Click to open the window. Remember to mark the *New Window* check box if you want to keep the current window open and review a related record.

VIEW, EDIT, OR ADD MODE

The terms *View*, *Edit*, and *Add* mode are used when referring to a window status.

View mode. The window is available for viewing only — you cannot click or tab into a field to add or modify information. Sometimes Action Menu functions are available in *View* mode, but the *Cancel* and *Save* button on the toolbar are disabled.

Edit mode. When you click *Edit* on the RiskPartner toolbar, only *Cancel* and *Save* are enabled. You can click in most of the fields to modify the record. Click *Cancel* to exit the record without saving any editing changes. Click *Save* to preserve the record with your changes.

Add mode. When you click *Add* on the RiskPartner toolbar, a new record window opens. Create a new record by adding information to the fields. Only *Cancel* and *Save* are available for selection. Click *Cancel* to exit the record without saving entries. Click *Save* to preserve the record as entered.

MOVING FROM FIELD TO FIELD

If you do not want to use the mouse to navigate a window, press the Tab Key to move the cursor from one field to another. To move in reverse order, hold down the Shift Key and press the Tab Key.

CURRENT USER INFORMATION

Path: File > Current User Information

The *Current User Information* option is a convenient way for the person who is logged in to review or change information about their record such as Password, Email address, and Phone.

The information is based on the established defaults for the person who is logged in. These defaults are set by the RiskPartner System Administrator from *Admin > User Management*.

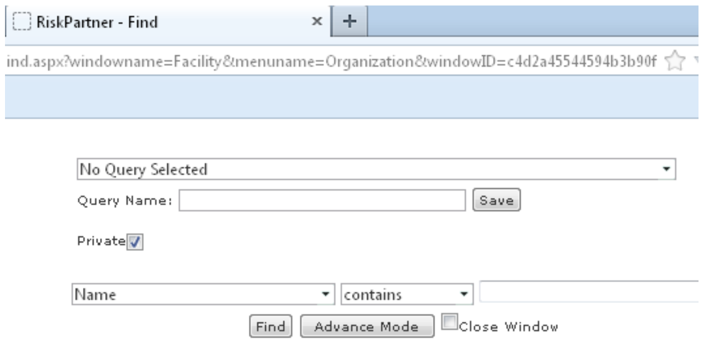
SEARCH AND QUERY

Search for records using several methods:

- Click *Search* on the RiskPartner toolbar.
- Click the *Browse* Tab on most windows.
- Create a custom browse query from the *Browse* Tab.

When looking for a specific record, the Search function is usually faster if you know details about the record and include them in your search criteria. Information about creating custom queries is found starting on page 22.

SEARCH OR FIND



When you click *Search* on the RiskPartner toolbar, the system displays a query window in "simple" mode on a separate Browser tab. All queries in RiskPartner give you options of both field names and type of filter operation, such as "contains," "is equal to," "begins with," etc.

Actions for most searches will be a simple field selection and filter option. The fields available for selection are based on the window that is open when you click *Search*.

More complex Advanced Mode operation is the same as creating a Custom Browse Query described on page 22.

1. Select the field name to query in the first field.
2. Select the desired filter operation such as "contains."
3. Add any qualifying information in the third field if needed. For example, if you are searching for a part that begins with P, type the letter P in the third field.
4. (Optional) Click to clear the *Close Window* check box. See note below.
5. Click the *Find* button on the window. The search results display in a grid below the search criteria fields.
6. Double-click a line item to close the Find Browser tab and open a record.

Note If the *Close Window* check box is clear, the *Search* Window remains open with the list of results. This is useful when you search for several records or if you are unsure of which line item you want. Since the Search Browser window remains open, click the application Browser tab to view the record.

BROWSE TABS

Most RiskPartner windows include a *Browse* Tab at the far right of the tab strip. These Tabs display a list of records available for the related window. You can click the column header and sort the entire list by that column including items on subsequent pages.

If you have a large number of records, use the custom query option on the *Browse* Tabs to help you shorten the list. You can define and save custom browse queries and reuse them for that module each time you click the *Browse* Tab.

The *Browse* Tab includes features to help you view the records in a way that is meaningful for you. The window includes *Export* and *Page Size* buttons. Columns can be sorted, resized, and rearranged using the column headings. The *Add*, *Edit*, *Copy*, and *Delete* button strip is part of the custom query.

The *Browse* Tabs for Exposure windows also display a 

button. Click the buttons to see a map of the country with "pins" that locate the place or item. Move your curser over the pins to see a popup that identifies the Code, Name, and Latitude/Longitude.

You can set page opening options to view the *Browse* Tab when a module window is opened rather than displaying with the *Detail* Tab.

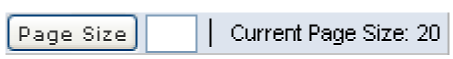
BROWSE TAB BUTTONS

Export Button

Use this button to export the browse list to an Excel spreadsheet. The options available on the ellipsis button allow you to select a page or all pages.

1. Click the selection button.
2. Choose the export option.
3. Complete the popup window to open the file or save to disk.

Page Size Button



Use this feature to indicate the number of records you want displayed on the *Browse* Tab at one time. Look for the *Page Size* button at the lower right of the Tab.

1. Type a number in the blank field next to the button. The size limit is 250 lines per page.
2. Click the *Page Size* button.

When the window refreshes, the number of records you specified displays on the page.

SORT, RESIZE, AND REPOSITION BROWSE COLUMNS

Column Sort

If you want to sort the Browse list by one column move the cursor over the header label until it changes to the Microsoft standard selection hand . Click the header label once to sort in ascending order (A to Z or 1 to 9). Click a second time to sort in descending order. Line items sort together such that any information related to a line in the sorted column stays with it.

The upward pointing arrow in the previous example indicates that the Code column is sorted in ascending order (A to Z).

When you use the sort feature, RiskPartner color-highlights the column being sorted.

Reposition Columns

To rearrange columns, place the cursor in the section of the header you want to move. When it becomes a four-sided arrow , click-and-drag left or right to the new position.

Resize Columns

Move the cursor near the beginning of a column label. When the cursor changes to a double-sided arrow ⟷, click-and-drag in either direction. When you press down on the mouse button, a tool tip shows the column width in pixels. This is a dynamic label and the number of pixels changes as you drag the cursor to resize the column.

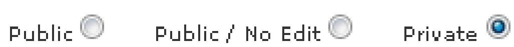
CUSTOM BROWSE QUERY

If the *Browse* Tab list is long, you can create your own custom queries to look for a defined group of records. Depending on your privileges, you can share your query with others.

Custom queries can be edited, copied, deleted, and exported to an Excel spreadsheet. The topic Custom Queries on page 24 shows the properties of the toolbar. How to Create a Custom Query on page 25 illustrates how to add a new query.

If your *Admin > User Management >Records / Preferences Tab* settings restrict queries, the custom queries you see may be restricted. You may not be able to edit or delete public queries, because separate access settings can prevent you from changing the public browse query. The topic Query Settings for Users below outlines how this access affects your queries. Contact your RiskPartner System Administrator if you have difficulty with a custom query.

PUBLIC AND PRIVATE QUERIES



An understanding of the concepts of public and private queries is useful before you create a custom query. Public queries are available system-wide to all RiskPartner users. The query named "Default" is a public query that lists all records for the module.

The public and private privileges for each user are determined by the RiskPartner System Administrator.

If you are allowed to create Public queries, you can prevent others from editing the query by marking the *Public/No Edit* radio button. With this setting on the query, all users can view the query, but they cannot change it.

The following describes the properties of the three settings:

- Public. This query is available to all users. Anyone can save or delete the query.

- Public/No Edit. Users can view and use the query, but they cannot save or delete the query. Only the owner, i.e., the person who created it, can make changes.
- Private. The query is invisible to all users except the owner. Only the owner can save or delete this query.

If the radio buttons are disabled on an existing query, it indicates that the user who loaded the query is not the owner. The word Owner: displays to the left of the radio buttons, if the logged-in user created the query.

Be sure to set up naming conventions to assure all users have access to your standard queries. A name can be used one time only within each module.

If you use queries in other modules, such as MyPage, the selection list of private queries available is filtered to show only those for the owner that is logged in. If a private query is included in a shared environment, such as MyPage, non-owners receive a message that the query cannot be viewed because it is Private.

Query Privilege Settings

Query privileges for each user are determined by the RiskPartner System Administrator.

The following descriptions summarize related *Client Info* and *User Management* window settings.

- **Default New Queries to Private.** The RiskPartner System Administrator selects this option in *Admin* > *Client Info*. If used, the *Private Query* check box on the advanced find window is marked by default. Depending on your user settings, you may or may not be able to change it on an individual query. If the System Administrator marks the *Create Private Queries Only* check box in *Admin* > *User Management* > *Records / Preferences*, the user cannot clear the *Private* check box when he or she creates queries.
- **Create Private Queries Only.** The RiskPartner System Administrator sets this option in *Admin* > *User Management* > *Records / Preferences*. If marked, a user can only create private queries.
- **Default Private Queries.** The RiskPartner System Administrator sets this option in *Admin* > *User Management* > *Records / Preferences*. If marked, the user can only set his or her personal default queries.

RiskPartner advises that you establish a naming convention for custom queries. A query must have a unique name for each module. Some users can be prevented from viewing a standard query unless you plan both names and privilege settings.

Contact your RiskPartner System Administrator for assistance in understanding any unexpected results. The topic Query Settings for Users outlines the possible combinations of Preferences settings that relate to queries.

Query Settings for Users

The RiskPartner System Administrator determines each user's query settings in *Admin* > *User Management* > *Records / Preferences*. Public queries can be used by every RiskPartner user in your organization. The following illustrations show how the options affect your custom queries.

When neither check box is marked, your privileges allow you to:

- Create and edit both public and private queries.
- Set both public and private queries as the public default

When *Create Private Queries Only* is marked, your privileges allow you to create and edit only private queries.

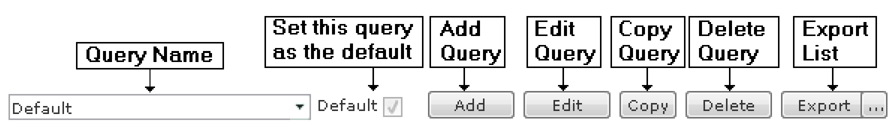
If your user setting labeled *Create Private Queries Only* is **unchecked** but your queries default to Private, the *Private* check box is enabled on the custom query *Add Dialog* popup. This means you can clear the check box and make your private query a public query. When *Default Private Queries* is marked, queries are set as Private once they are saved, and your privileges allow you to:

- Create and edit both public and private queries
- Clear the private check box and create public queries

When both check boxes are marked, your privileges allow you to create and edit private queries **only**.

Be cautious with public queries. Creating numerous public queries lengthens the list and makes it difficult to use.

Custom Queries



When you click the Query Toolbar buttons above the browse list on a *Browse* window, you can create or revise custom queries. Use the buttons on the query toolbar to add, edit, copy, or remove custom queries.

Make your *Query Name* meaningful to you. The same query name can be used once per module.

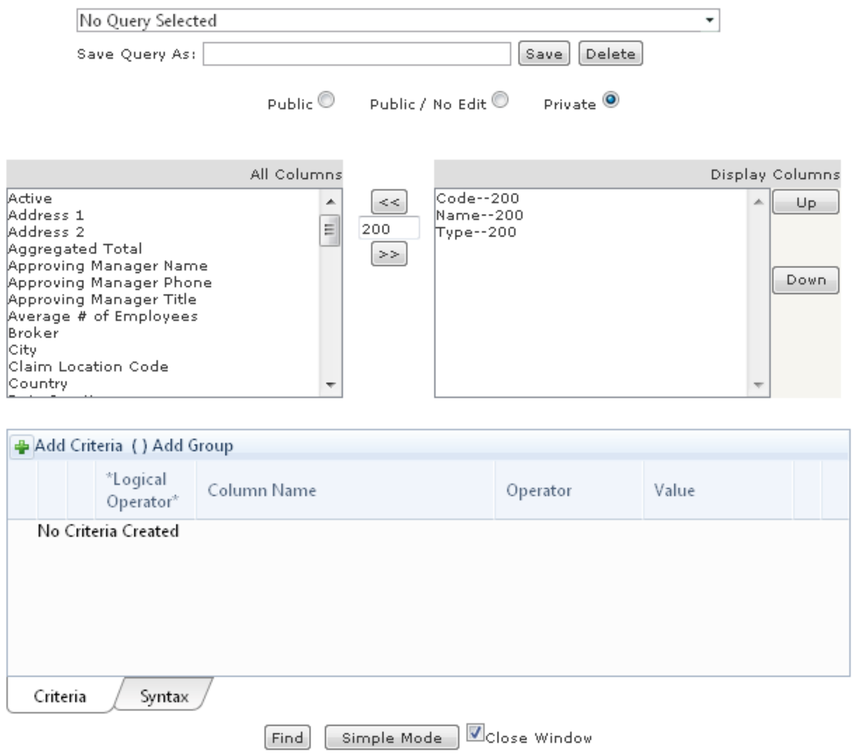
Criteria rows for the Advance Search can be grouped and ranked by hierarchy. Click the *Add Group* link to add child rows to form a criteria grouping. Use the up and down arrows to set the hierarchy of how group lines are processed. Click the *Syntax* Subtab to review the text of your criteria settings.

Test your query before you save it by clicking the *Find* button after you have created your query.

If you prefer to use a simpler query format, click the *Simple Mode* button.

Naming TIP: A suggested format for the Query Name is [Your Last Name] [Search Information]. An example of this format is Kowalski Sedans. The name tells you this is a query created by Stanley Kowalski to search for all vehicles with a Type category of Sedan.

HOW TO CREATE A CUSTOM QUERY



After you click the *Add* button on the Query Toolbar, the custom query *Add Dialog* window opens. The upper section of the window shows column display and optional fields. The lower grid is used to establish your search criteria.

Select Columns to Display

1. Type the *Query Name*, i.e., the name you assign to the query. See the naming Tip in the previous topic, Custom Queries.

2. Select a field name in the *All Columns* box. See the topic Custom Query Ancillary Fields for more information about using Ancillary fields on some records.

3. Click the right arrows button to move selected columns to the *Display Columns* field. The topic How to Delete Columns in a Custom Query shows how to remove columns.

4. (Optional) Select a broker in the *Access by Broker* field to limit the search to a specific broker.

5. (Optional) Select a Public/Private radio button to open or restrict use of the query.

Add Search Criteria

1. Click the *Add Criteria* link in the Criteria grid.
2. Select the desired *Column Name*.
3. Select the *Operator*. TIP: The argument "contains" returns more results than "begins with." Using "contains," RiskPartner searches for the word or character string shown in the text box regardless of where it occurs within the designated field. For example, the word "Belt" can occur anywhere in the description and RiskPartner will return the record in your query.
4. Type the *Value* in the third field (if the operator requires it). This is the field where you specify the alpha-numeric characters you want to search for.
5. Select 'and' or 'or' Boolean *Logic Operators* that relate to subsequent Criteria lines. This determines how many records will be included in the query results.
6. Click the *Update* link below the and/or field. This adds your selection as a line item to the *Criteria* box.
7. Add more *Criteria* until you have added as many constraints as needed.
8. Click the *Save Query* button at the top of the dialog window.

Once saved, your query is available on the *Browse* Tab of the module. See the next topic, How to Use a Custom Query, for instructions on selecting your query.

Note If the *Private* radio button is marked and other radio buttons are disabled (dimmed), your queries must be private.

CUSTOM QUERY ANCILLARY FIELDS

The windows listed below offer additional field selection in your Custom Query (ancillary fields).

- Location
  - UDF Fields
  - Broker
- Building
  - UDF Fields
  - Extended COPE Fields
- Claims
  - UDF Fields
- Incident Management
  - UDF Fields
  - Involved Party Fields
- Custom Compliance Submissions
  - Result Fields
- Questionnaire
  - Result Fields
- Inspection Form
  - Inspection Point Fields
- Driver Schedule
  - Vehicle Info

        - Aircraft/Watercraft Info
    - Vehicle
        - Driver Info
    - Aircraft/Watercraft
        - Driver Info
    - IRP Forms
        - IRP Risk Info

The Ancillary fields are also listed in the *All Columns* field and can be added to the *Display Columns* field. Each Ancillary field added increases the number of columns visible with this query on the *Browse* Tab. If you add many columns, scroll to the right to see your custom selected columns.

HOW TO USE A CUSTOM QUERY

Once you have created and saved a custom query, follow these steps to see the result:

1. Go to the *Browse* Tab on the desired window.

2. Click the down arrow in the top field, the field that displays the word 'Default'.

3. Select your *Query Name* from the titles. *

After you make a selection, the window will refresh and display results based on the custom query.

* The titles you see include public queries as well as your private queries.

HOW TO EDIT A CUSTOM QUERY

After you have created and saved a Custom Query, you may want to add or delete more columns, arguments, and criteria. To open the query:

1. Go to the *Browse* Tab of the desired module.

2. Select your *Query Name*.

3. Click *Edit* on the Query Toolbar.

4. Make your changes on the RiskPartner *Add Dialog* popup window.

5. Click the **Save Query** button on the window.

To remove Columns, see the next topic How to Delete Columns in a Custom Query. To remove Criteria, go to How to Delete Criteria in a Custom Query below.

HOW TO DELETE COLUMNS IN A CUSTOM QUERY

To delete columns from your custom query:

1. Go to the Browse Tab of the desired module.

2. Select your *Query Name*.

3. Click *Edit* on the Query Toolbar.

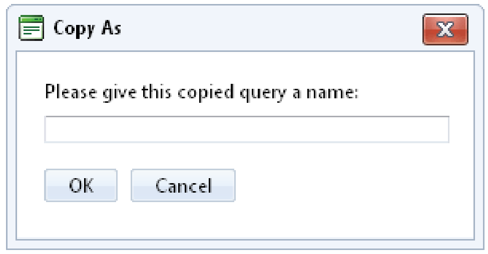
4. Select columns to be removed from the *Display Columns* field.

5. Click the left arrows button to move selected columns to the *All Columns* field.

6. Click the **Save Query** button on the window.

In *Edit* mode, you can use the same steps in How to Create a Custom Query to make new selections from the *All Columns* field and use the right arrows button to add columns for display.

HOW TO COPY A CUSTOM QUERY



Once you have created a custom query, you can save a copy of the query with a new name and make modifications rather than construct an entirely new query.

To copy a query:

7. Select a custom query from the selection field.
8. Click the *Copy* button on the Query Toolbar.
9. Type a new name for the copied query.
10. Click *OK* on the *Copy As* window. The window refreshes with your copied query.
11. Click the *Edit* button on the Custom Query Toolbar.
12. Follow the instructions in How to Edit a Custom Query on page 27.

HOW TO SET A CUSTOM QUERY AS DEFAULT

To designate your custom query as your default:

1. Select the *Query Name*.
2. Click the *Default* check box at the right of the *Query Name* field.

This is now your default query on the Browse Tab for the module.

If you do not have permission to set your own default query, the check box is disabled.

HOW TO DELETE CRITERIA IN A CUSTOM QUERY

To delete arguments and criteria from your custom query:

1. Go to the *Browse* Tab of the desired module.
2. Select your *Query Name*.
3. Click *Edit* on the Query Toolbar. Use instructions in How to Edit a Custom Query on the previous page if you have difficulty.
4. Click the red X icon for the Criteria line to be deleted.
5. Click *OK* on the confirmation popup.

6. Click the **Save Query** button on the window.

In *Edit* mode, you can add new arguments and criteria using the procedures outlined in How to Create a Custom Query on page 25.

HOW TO SET PORTAL DATA COLLECTION GRID COLUMNS

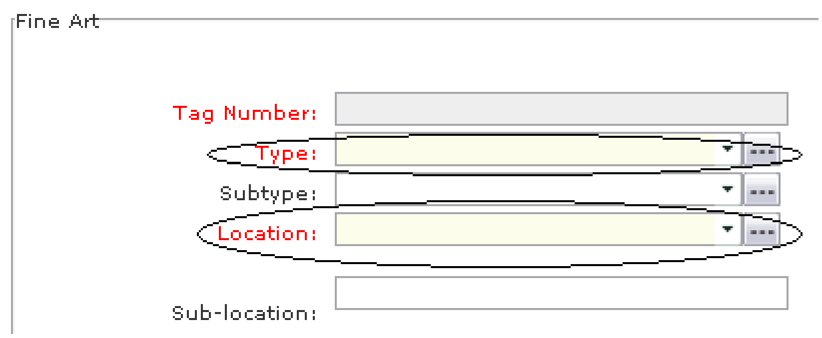
If you use the RiskPartner Data Collection module, the Exposure window *Browse* Tabs also include a *Default for Data Collection* check box at the top of the grid. It is used in conjunction with custom queries to select columns that the Portal users see in the *Data Collection* grid.

1. Create and save a new Browse Query using the desired columns.
2. Select the custom query on the *Browse* Tab.
3. Mark the *Default for Data Collection* check box on the *Browse* Tab.

This query then determines the columns that the user sees in the Portal.

REQUIRED FIELDS

In *Edit* mode, required fields are highlighted and the labels are red as illustrated in this screenshot:



If *Tag Number* fields have red labels yet are disabled, your System Administrator has set the numbering as automatic. The *Tag Number* is completed when you save the record.

In *View* mode, an underlined label indicates a link, for example, the *Location* label is underlined on a Building record when the *Location* field is populated. Click the underlined label to open the related Location record.

DATA SELECTION

When a field accepts manual entry or a selection, RiskPartner uses "auto-find" to suggest a list of possible matches. Click the down arrow in a field and type the first few characters of the code to filter for your choice.

If you want to see a full list with descriptions, click the ellipsis ... button to open the selection window.

POPUP WINDOWS

When you click a link on a window (such as the *Location* link on the *Building* window), a popup window opens.

In some cases, links on the popup window will also launch another popup selection window.

Popup or Secondary Window Buttons

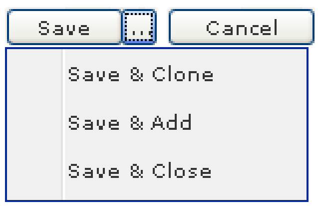
Any time a popup window displays a *Save* button or an *OK* button, you must click the button to save the information.

If you click a *Close* or *Cancel* button on a window before clicking *Save*, RiskPartner does not write your information to the database, and your entries are lost.

In complex windows, it is easy to overlook the *Save* button.

Save Button Context Selections

Occasionally you will see an ellipsis button next to buttons such as *Save* on many popup windows. Click the ellipsis button to choose from the available options.



The *Save* button selections operate as follows:

Save & Clone – Add a line item to the underlying grid, and leave the saved data in the fields. Make changes to the cloned data as needed before saving.

Save & Add – Add a line item to the underlying grid, and clear the popup window for another selection.

Save & Close – Save the entry and close the popup window.

COMMON FUNCTIONS

COMMON TABS AND CHECK BOXES

Many functions are repeated in both basic and optional modules of RiskPartner. Operation is the same in any window. Different modules contain various combinations. In addition, each window has an Action Menu with features that relate to the window. Many of the Action Menu links are repeated throughout the application and are included in this document.

Some Tabs and check boxes are used with more than one RiskPartner window. Included in these are:

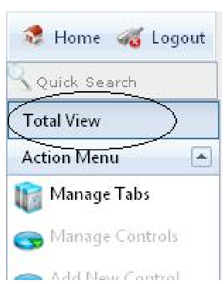
- Action Menu
- Active check box
- Additional Interests
- Brokers
- Claims
- Contacts
- Snapshots
- Status History
- UDF
- Visible check box

The topics in this document detail the purpose of these features as well as the windows in the RiskPartner where these are used.

TOTAL VIEW

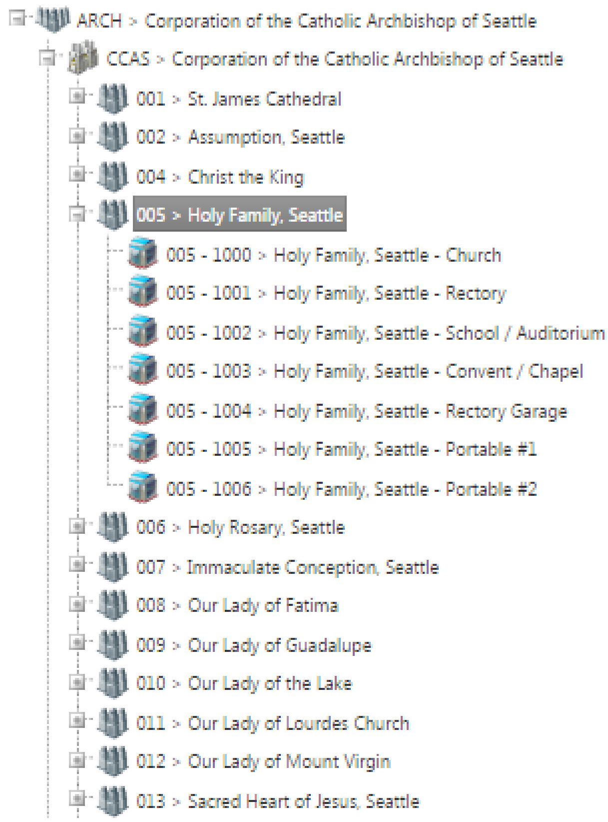
Total View is used to visualize your organization's hierarchy from Division through Area.

The *Total View* button is located above the Action Menu.



Total View is a tree list that is always available from any window and lists Division through Area records. If you have a record open from one of those windows, RiskPartner zooms to highlight that record in the Total View tree list.

Click the *Total View* button to toggle the view on or off.



ACTION MENU

The Action Menu section of the Navigator pane is a useful part of RiskPartner. Each time you open a different module, the content of the Action Menu changes. Links on the menu provide the opportunity to perform additional actions related to the record.

Some windows have several links. Other windows may have only one or two links.

Most links on the Action Menu open a secondary popup window where you can review or add information. A few, such as Create Claim, open the related window to perform the action described. The next topics describe links you see frequently.

Depending on the type of link, use of an Action Menu function is available in *View* mode or *Edit* mode.

ADD OR REMOVE FAVORITE

The *Add Favorite* link appears on the Action Menu for every window. Use it for fast access to windows that you open frequently, i.e., your "favorite" windows. The link displays as either *Add Favorite* or *Remove Favorite* depending on whether the window has previously been selected as a favorite.

Your selections display in the *Favorites* section of the Navigator pane. When you click a *Favorites* link, RiskPartner launches the related module. The links are enabled in both *View* and *Edit* mode.

To add a window to the *Favorites* section:

1. Navigate to the window you want to add.

2. Click the *Add Favorite* link on the Action Menu.

When the Action Menu refreshes, the label on the link now displays as *Remove Favorite* and the window displays on the *Favorites* section of the Navigator pane. Click the *Favorites* section of the Navigator pane to see the link you added.

To delete links from the *Favorites* section:

3. Navigate to the window you want to remove.

4. Click the *Remove Favorite* link on the Action Menu.

When the Action Menu refreshes, the label on the link now displays as *Add Favorite* and the window link is removed from the *Favorites* section of the Navigator pane.

Last Modified Link

The *Last Modified* link on the Action Menu opens the *Modification History* popup window. The read-only fields show the creation history (name and date) as well as the name of the last person who modified the record and the date it was modified.

Linked Documents

The *Linked Documents* link on the Action Menu opens the *Linked Documents* popup window where you can review or add documents, images, audio files, video files, URLs, and UNCs. Files are launched from the *Linked Documents* window in the correct application or viewer. Some have editing and formatting functionality. The link is enabled in View mode.

A UNC link is clickable in Internet Explorer. Since a UNC links a path on your internal network, no *protocol:* prefix is needed when you create the link. However, be sure the selected path starts with \\, otherwise the system returns the message, "Please enter a UNC path." When you open a UNC path to an image, it displays in a viewer with zoom capabilities. A UNC link shares with the UNC drive only, not with your C: drive. It does not import the document to the database.

To assure the UNC path link is active, the RiskPartner Server must be added as a trusted site in IE. This can be pushed as a group policy setting by a Network Administrator at the client site or set manually through the *Security* Tab of the *Internet Options* window. The check box *Require server verification (https:) for all sites in this zone* is checked by default. **Clear the check box** to allow sites to be added that do not include the HTTPS protocol.

The *Category* field available when you add a linked document applies to the Portal. If your organization uses the Portal and has set up *File > Organization > Lookups > Linked Document Categories*, the document will display on the appropriate Subtab of the Portal *Downloads* window.

All linked files are limited to a maximum size of 4MB. RiskPartner returns an error message if you try to link a larger file.

Note The application used to create the selected file must be installed on or available to the RiskPartner workstation in order to launch a file with *Linked Documents*.

HOW TO ADD LINKED DOCUMENTS

1. Click *Linked Documents* on the Action Menu to open the *Linked Documents* window.
2. Click the *Add Document* link at the top of the grid to open the *Document Entry* popup.
3. Type a *Filename* to help you identify the file when you want to retrieve it later.
4. Select the *Type* of the file to be linked, such as document or image.
5. (Optional) Type a *Description* of the linked file for more detailed information.
6. (Optional) Select a *Category*.*
7. Click the *Browse* button and locate the file to be linked.
8. (Optional) Check the *Show in Downloads* box if you want this file made available to Portal users. **Note:** This check box is only available for hierarchy records. When a document is uploaded at a given hierarchy level, only users with access to that level and that specific location can see the document. Data Collection, Policy, and similar non-hierarchical linked documents cannot be shared on the Portal, and the check box on the *Document Entry* window is not displayed.
9. Click the *Save* button on the *Document Entry* popup.
10. Click the *Save* button on the *Linked Documents* window.
11. Click the *Close* button on the *Linked Documents* window.

* Category is used as an additional way to sort your documents. You can create useful categories in *File* > *Organization* > *Lookups* > *Linked Document Categories*. When you designate a Category for the document, you can sort the list of linked documents by Category. Your documents appear on Subtabs in the Portal *Downloads* window.

HOW TO DELETE A LINKED DOCUMENT

1. Open the applicable record.
2. Click *Linked Documents* on the Action Menu.
3. Click the icon adjacent to the File Name.
4. Click *OK* on the "Are you sure..." prompt.
5. Click the *Save* button on the window.
6. Click the *Close* button on the window.

HOW TO VIEW AN EXISTING LINKED DOCUMENT

Depending on the type of file you attempt to view, your browser may inform you of the location to which the file will be downloaded. Regardless of your selection of *Open with* or *Save to Disk*, the selected file is downloaded to the Downloads folder.

From the desired record:

1. Click *Linked Documents* on the Action Menu.
2. Double-click the line item in the list of linked files.

Graphic and .txt files open in a default viewing window.

Select the *Open with* radio button or *Save to Disk* button. By default, the system recognizes the application that was used to create the doc.

You can modify an open file. Be sure to save the modified file with a new name to a folder of your choosing. After saving, the new file must be linked using the steps outlined in How to Add Linked Documents on page 34.

ACTIVE AND VISIBLE CHECK BOXES

ACTIVE CHECK BOX

Records that are no longer needed should not be deleted from the database, but RiskPartner provides the *Active* check box as a way to maintain the integrity of the database without cluttering selection lists with obsolete items.

Many windows throughout RiskPartner include an *Active* check box. It is checked by default when you create a new record. The purpose of making a record Inactive, i.e., clearing the check box, is to keep the database intact and streamline day-to-day data entry.

For information about the behavior of inactivation for hierarchical records, see the next topic, Inactivation Cascades through Hierarchy.

INACTIVATION CASCADES THROUGH HIERARCHY

When you inactivate a Division, Region, District, or Location, the system inactivates all lower levels of the hierarchy associated with the inactivated level including the Building. It does not inactivate any exposure items linked to the Building or Location.

Example: If you inactivate a Region record, the system checks and inactivates any Districts associated with the Region, it further inactivates any Locations affiliated with the Region, and finally it inactivates any Buildings joined to the Locations. Note that the Division, a higher level, remains Active. If the Division were inactivated, all the levels beneath it would be made Inactive.

Since the exposure items (Equipment, Fine Arts, Assets, etc.) are still linked to the Building or Location and remain Active, you can move the items manually by editing individual records and changing the Location.

VISIBLE CHECK BOX

The *Visible* check box is visible on the *Exposure > Property > Location* and *Exposure > Property > Building* windows. The box is checked by default. Clear it to prevent information about the record from being seen in reports.

BROKERS TAB

Broker records are linked to records in other tables throughout the RiskPartner application for filtering and security purposes. Several brokers may be assigned to each user. The user's selection is restricted to the assigned brokers.

Broker records are established in *File > Organization > Broker*. After you add broker records, they are available for selection on the *Brokers Tab* in other RiskPartner windows. In every window where the *Brokers Tab* is found, RiskPartner requires that you add a broker in order to save the record.

Be sure to add affiliated brokers on the Lookups *Additional Interest Types* and *Department Types* records. Without these entries, a broker cannot be selected and records cannot be saved for *Organization > Additional Interests* or *Organization > Departments*.

For security purposes, brokers with login privileges to RiskPartner can only access the records that apply to records applicable to that broker's clients. The limit on data access is set from the broker's User record in *Admin > User Management > Records*.

The *Brokers* Tab is found on the following windows:

Lookups/Additional Interest Types	*Organization > Department*
Lookups/Department Types	*Property > Location*
Organization > Additional Interests	*Loss Control > Loss Recommendations*

CLAIMS TAB

When Claims are recorded from the *Claims > Claim* window, the Claim must be related to a Location record, but you can attach other items to the Claim as well.

Any record that is attached to the Claim displays the Claim information on the read-only *Claims* Tab.

The *Claims* Tab is found on the following windows:

*Property > Location **	*Fleet > Aircraft/Watercraft*
*Property > Building **	*Fleet > Drivers*
Property > Equipment	*Personnel > Employee **
Property > Fine Art	*Policy > Policies*
Property > Asset/Furniture	*Claims > Incident Management*
Fleet > Vehicle	

* The *Claims* Tab on the *Location*, *Building*, and *Employee* windows also displays an *Incidents* grid that shows the incidents related to the claims shown in the *Claims* grid. Double-click a line in a grid to zoom to the related record.

CONTACTS TAB

The *Contacts* or *Contacts/Notes* Tab is used to store useful names, addresses, and phone numbers of contact persons. The *Contacts/Notes* Tab also has a Notes Subtab to store additional information about the record.

The *Broker > Contacts* Tab shows a list of all contacts linked to the Broker. Open a Broker record and add, edit, or delete links to contacts when in *Add* or *Edit* mode.

Check the *Global* box at the lower right to see contact information for all records. When the check box is clear, the list applies to the current record only.

The *Contacts* Tab is found on the following windows:

Organization > Broker	*Policies > Carrier*
Organization > Additional Interests	*Claims > Claim*
Property > Location	*Certificates > Provider*
Certificates > Requirement Forms (Acord 24, 25, 28, & Custom)	
Certificates > Certificate Forms (Acord 24, 25, 28, & Custom Req. Subm.	

How to Add Contacts/Notes to Location

To add or edit Contacts to Location records from the desired record:

1. Click *Edit* on the RiskPartner toolbar.
2. Click the *Contacts/Notes* Tab.
3. Click the *Add Contact* link on the window.
4. Complete the *Contact Entry* popup window.
5. Click the *Save* button on the window. *
6. Click *Save* on the RiskPartner toolbar to save the record.

* If you have several contacts to add, use the *Save & Clone* or *Save & Add* options on the popup to create several contacts before you save the Location record.

SNAPSHOTS TAB

The *Snapshots* Tab is a read-only Tab that displays any changes made to the record in either *Add* or *Edit* mode. Double-click a line item in the grid to open the *Snapshots View* window and see information in the record for the date shown.

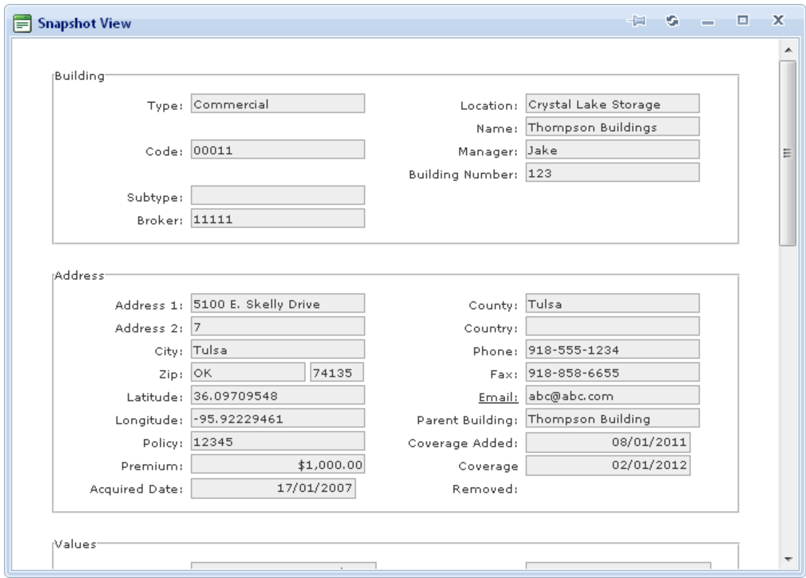
Select different lines in the grid to research changes made from the beginning of the record.

The *Snapshots* Tab is found on the following windows:

Property > Location	*Fleet > Drivers*
Property > Building	*Personnel > Employee*
Property > Area	*Personnel > Attendee*
Property > Equipment	*Personnel > Training*
Property > Fine Art	*Personnel > Payroll*
Property > Assets	*Claims > Occurrence **
Fleet > Vehicle	*Claims > Case **
Fleet > Aircraft/Watercraft	*Claims > Claim **
Certificates > Provider	
Certificate Forms > (Acord 24, 25, 28, & Custom Req. Submissions)	

The *Snapshot View* window shows a complete history. Scroll down to see all fields, and scroll across to see all columns.

If you click the first line item, which is usually the date the record was added, the popup window is blank since there is no previous data. Click any other line to see complete details about the record on the given date.



* Starting with v2.8.5, the *Snapshots* Tab for these Claims windows highlight fields with values that have changed since the previous Snapshot.

FOR ADMIN USERS ONLY. To roll back data on the *Detail* Tab (and the COPE Tabs for Buildings only), double-click a snapshot line and scroll down to locate the *Rollback to This Value* button at the bottom of the window. When you click the button, RiskPartner changes the contents of fields on the *Detail* Tab to that of the snapshot line item. A new snapshot line is also created for the values that were replaced. Currently, this feature only applies to the following windows: *Aircraft/Watercraft*, *Area*, *Assets*, *Attendee*, *Building*, *Drivers*, *Employee*, *Equipment*, *Fine Art*, *Location*, *Payroll*, *Training*, and *Vehicle*.

STATUS HISTORY TAB

The read-only *Status History* Tab shows the status and identifies any correspondence about the record

The Tab is found on the following windows:

- *Exposure > Data Collections > Records*
- *Loss > Loss Recommendations*

UDF (USER DEFINED FIELDS) TAB

The *UDF* Tab is employed by advanced users to record information or data that is not included in the predefined fields of a record. The Tab is found in many of the RiskPartner modules.

If you want to track the date a piece of equipment was installed, you can create a field with that label in Lookups and add your own date on the *UDF* Tab for an item of that type. While you can view these custom fields, the fields are not supported on printouts.

These new fields/labels are added by your RiskPartner System Administrator. Custom labels are determined in *Organization > Lookups* for many of the listed Lookup Types. Some *UDF* fields also have an icon available to select contents from a popup window described in the next topic.

With limitations, you can search for UDF entries. See Search UDF Fields for more information.

About UDF Popup Selections

In *Edit* mode, the first six fields on the left side of the *UDF* window have a selection button , which you can use to select text that was previously entered in the field.

The text is restricted to item records of the same item type. For example, suppose you create an asset record and the type is computer. If you typed "Laptop" in the first character field, the next time you created an asset type for a computer record, the term "Laptop" would be available from the *UDF* popup selection window.

Popup selections are restricted to the field for which they are entered.

HOW TO USE THE UDF TAB

To track additional information:

1. Navigate to the desired record.
2. Click *Edit* on the RiskPartner toolbar.
3. Click the *UDF* Tab.
4. Enter the data specified by the field label(s).
5. (Optional) Click the icon to select previously entered text.
6. Click *Save* on the RiskPartner toolbar to save the record.

Your RiskPartner System Administrator establishes these fields such as a field to track the date a piece of equipment was installed.

ADMINISTRATIVE FUNCTIONS

SITE HIERARCHY

From highest to lowest, the hierarchy is as follows:

Organization – Organization is the highest reporting level in the hierarchy and represents the rollup for all of the Archdiocese of Seattle.

Division – Catholic Community Services, Catholic Housing Services, and Corporation of the Catholic Archbishop of Seattle.

Location – Individual sites such as parishes or office locations.

Buildings – Physical Structures

CLIENT INFO

Path: Admin > Client Info

System Administrators use the Client Info module to establish global preferences for the application. The *Client Info / Detail* Tab reflects the information you provided during initial setup. You can choose various options to meet the needs of your organization and add a logo that displays on RiskPartner pages. The following topics address how to make changes and how to add a logo.

Numbers in the A*nnual Average Number of Employees* and *Total Hours Worked By All Employees* are the same values entered in your OSHA Form 300A (Summary).

In the same way, your *Standard Industry Classification* and *North American Industry Classification* entries are also applied to OSHA Form 300A (Summary).

HOW TO COMPLETE CLIENT INFO

Path: Admin > Client Info / Detail Tab

To add your selections to the *Admin > Client Info / Detail* Tab, use the following general steps.

1. Select *Admin > Client Info*.
2. Click *Edit* on the RiskPartner toolbar.

3. Complete the general address and other fields specific to your organization. Note that the *Email* address is used for all outgoing notifications and email **except** for Certificate Notifications, which use the *Certificates of Insurance Default Email* address on the *Preferences* Tab.

4. Click *Save* on the RiskPartner toolbar.

HOW TO ADD A LOGO

Path: Admin > Client Info / Detail Tab

1. Click *Edit* on the RiskPartner toolbar.

2. Click the *Browse* button adjacent to the upper *Company Logo* field.

3. Locate the desired file (.jpg or .gif).

4. Click *Open* on the *File Upload* window to add the file.

5. Click *Save* on the RiskPartner toolbar, and your logo displays on the window.

Note: The maximum height of the logo is 42 pixels. The maximum width is 200 pixels. The only acceptable file formats are .jpg or .gif.

Once you save a logo, the selection fields are not visible. If you want to change the logo, repeat the steps above, and select a different file.

In order to see your new logo displayed, log out of RiskPartner and log in again.

PREFERENCES TAB FOR CLIENT INFO

Path: Admin > Client Info / Preferences Tab

Use this window to select options that apply to your organization. The list may be extensive. Use the vertical scroll bar to view all check boxes.

Preferences Definitions explains how these selections are applied.

PREFERENCES DEFINITIONS

Path: Admin > Client Info / Preferences

The following fields are available for selection on this window.

Time Zone – Select the GMT time zone for the entire organization. All date-time fields are stored as GMT (Greenwich Mean Time) in the database. Unless User Time Zone Preferences are set, the date/time fields in the application show the Client Info Time Zone.

The application checks User and Client Info. A Time Zone set for a User record has priority over Client Info.

Exception: In the case of a Date field or Time field only, the data is stored as entered and is not converted to GMT.

Date Format – Select date format reflected in the application from the four options available: MM/dd/yyyy; dd/MM/yyyy; dd.MM.yyyy; or yyyy/MM/dd.

Default New Queries to Private – Mark this check box to make a custom browse query private by default. This setting restricts a custom query to the person who created it and reduces the list of named queries. By limiting queries to private, you reduce the query list available to general users. A shorter list also allows individuals to find their personal queries more easily. In conjunction with this option, you can mark the Admin > User Management > Records / Preferences Tab to enable the Create Private Queries Only check box. When marked, users cannot clear the Private check box when they create queries.

Location Hierarchy Start At – Click the down arrow in this field to set the highest level in the location hierarchy for your organization.

Starting Month of Fiscal Year – Select the appropriate start of the fiscal year for your organization.

Minimum Password Length – Enter the least number of characters required to establish a RiskPartner password.

Password Complexity Required – Mark this check box to require some combination of alpha, numeric, upper case/lower case, special, or unique characters in a RiskPartner Password.

Maximum Password Age (Days) – Enter the maximum number of days allowed to elapse before users must change their password.

Minimum Password Age (Days) – Enter the number of days that must elapse before users can change their password. This prevents users from rapidly cycling passwords with the intent of fulfilling the Password History Count so they can get back to their original password. With a Minimum Password Age, the user must wait at least the minimum number of days before they can change the password.

Password History Count – Set a number to determine how far back to track the user password history. When a user enters a new password, it is checked against the user's history to ensure that the same or similar password has not been reused within the password history count. This prevents a user from changing back and forth between two passwords when one expires.

Password Does Not Expire – Mark this check box if users never have to change their password.

Email Notifications Disabled – Mark this check box to prevent all e-mail notices from being sent.

Number of Days to Be Notified Before Policy Expires – Enter the number of days in advance to send an alert e-mail to the risk manager.

Email Address for Policy Expiration Notices – Enter the risk manager's e-mail address to receive notices about policy expiration.

Risx Facs FTP URL – Enter the URL provided by GB.

Risx Facs FTP Username – Enter the username provided by GB.

Risx Facs FTP Password – Enter the password provided by GB.

Disable Data Access at Building Level – When data access is assigned to a user, check this box to prevent expansion any of the building records. Expanding each level takes more time, and it is unusual to grant a user access to specific buildings; therefore, disabling data access at the building level speeds up access to relevant data.

Flag Variance Changes of 10% or more in Data Collection (Also show original value in tooltip) – Check this box to allow the system to display a popup message when portal users enter monetary values that differ by 10% or more from the last record saved. When users tab out of the field, the message alerts them and asks that they verify input before saving the record.

The approver in the application is also notified from the Data Collection record when he or she views the item before approval.

Show Data Collection by District in Portal – Check this box to include *Data Collection by District* on the Data Collection menu in the Portal application. By default, only the *Data Collection by Location* is shown.

The following features are **unavailable to most clients**.

LDAP Login – Mark this check box if you use the LDAP login system.

Allow Remote Network Login – This check box is used if you have a special class of users who do not need to log in to RiskPartner.

Remote Network Login Key – If you use remote login, enter the character string that is used when you configure settings outside RiskPartner.

Default LDAP setting for user import – Select the source if you use the user/requestor records created through the import web service.

Allow New SSO User Access – Mark this check box to allow users that do not exist in RiskPartner to connect if their SSO credentials are accepted.

New SSO User Role – This setting is only used if the *Allow New SSO User Access* setting is checked.

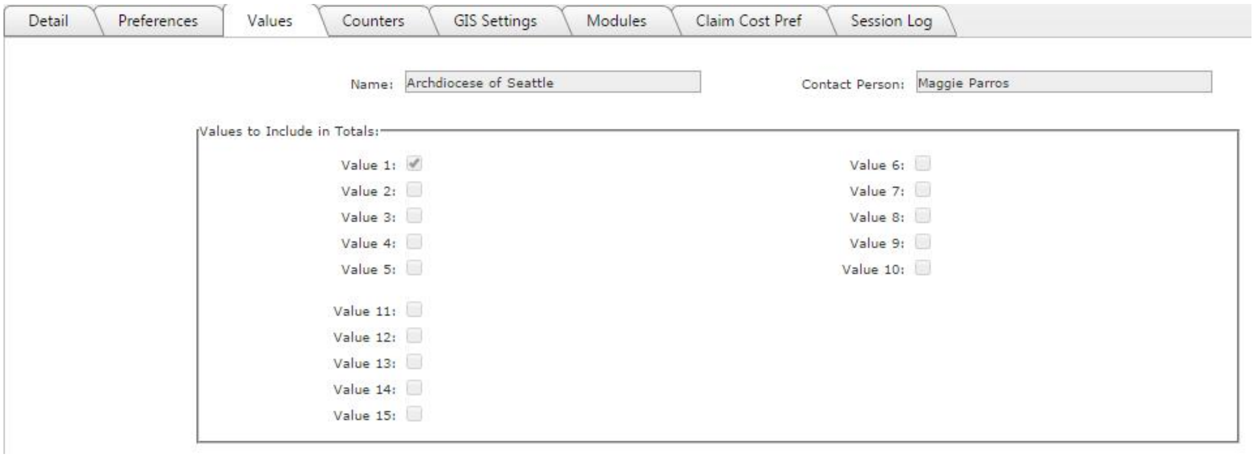
API Key for Web Service Access – Required for interfaces where data is transferred via a Web Service.

Hide Copy button in Data Collection Portal Windows – Use this setting to remove the Copy icon from the item grid in the Portal *Data Collection by Location* window.

Certificates of Insurance Default Email – This field stores the *From* address for all certificate notifications. If you utilize the Gallagher Service Center, the field is populated by a RiskPartner consultant during implementation.

System Default Broker – Enter the broker name you want to use as a system default and automatically populate the *Broker* field when new records are added.

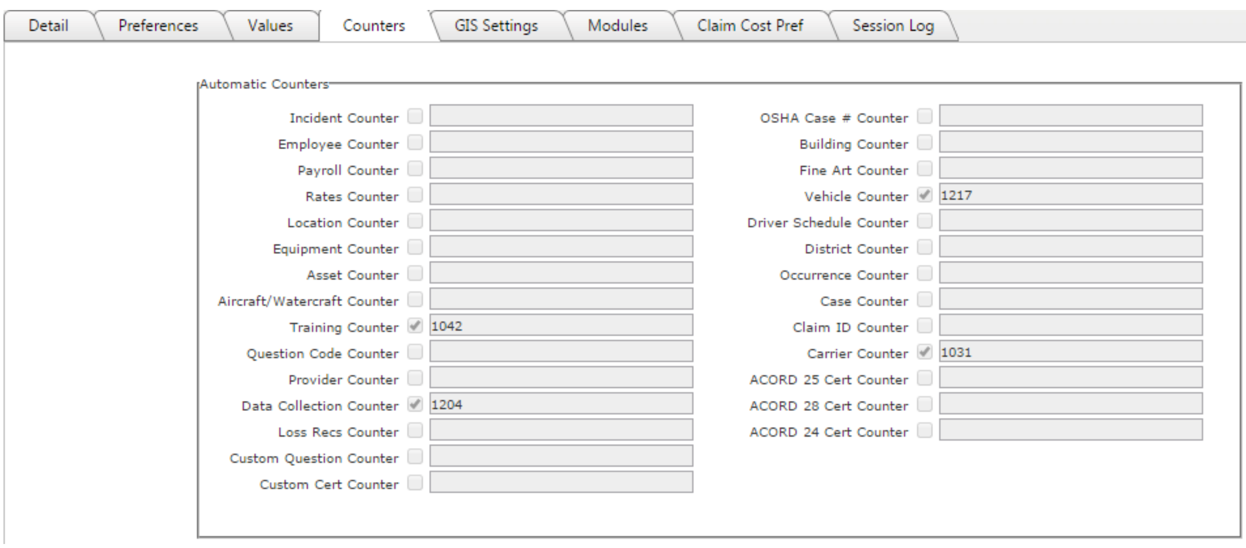
CLIENT INFO VALUES TAB



Path: Admin > Client Info / Values Tab

If you want the contents of *Values* fields on every level of the hierarchy to be included in the total insured value, check the fields to be included in total insured value.

CLIENT INFO COUNTERS TAB



Path: Admin > Client Info / Counters Tab

Use this window to set the starting sequence of record numbers. All counters can be set manually, or you can allow RiskPartner to set the first number these functions starting with 0 (zero).

If you leave a check box blank for a type of record, RiskPartner requires that users enter a unique identifying number each time a new record is created and saved.

HOW TO SET AUTOMATIC COUNTERS

You can establish counters at the same time you add other setup information, or you can elect to do this later.

1. Go to *Admin > Client Info / Counters* Tab.

2. Click Edit on the RiskPartner toolbar.

3. Click the check boxes for any of the items you want automatically numbered.

4. Type the starting number for desired items.

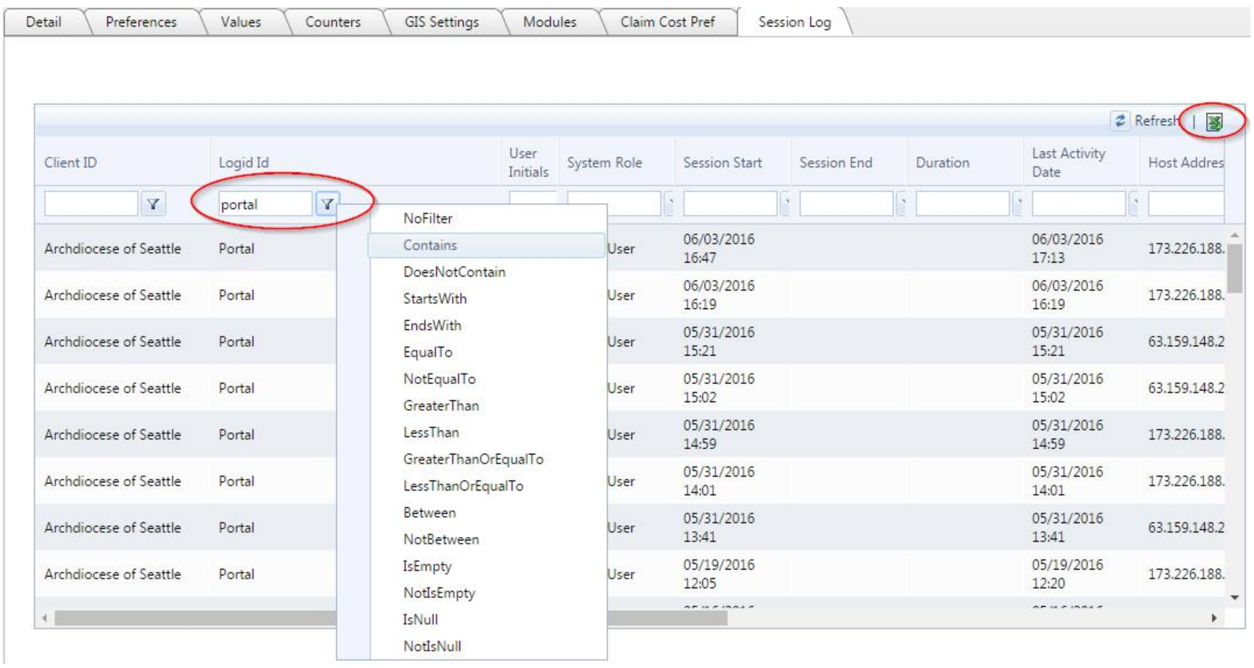
5. Click Save on the RiskPartner toolbar.

Client Info Modules Tab

Path: Admin > Client Info / Modules Tab

The *Modules* Tab shows the modules you have purchased in RiskPartner. If you choose to purchase more modules at a later time, this window is updated to show the modules in use.

Client Info Session Log Tab



Path: Admin > Client Info / Session Log Tab

The Session Log Tab displays previous login transactions in RiskPartner. Use this window to determine if users have logged in but have not logged out. RiskPartner displays the last 1000 logins.

To filter session records:

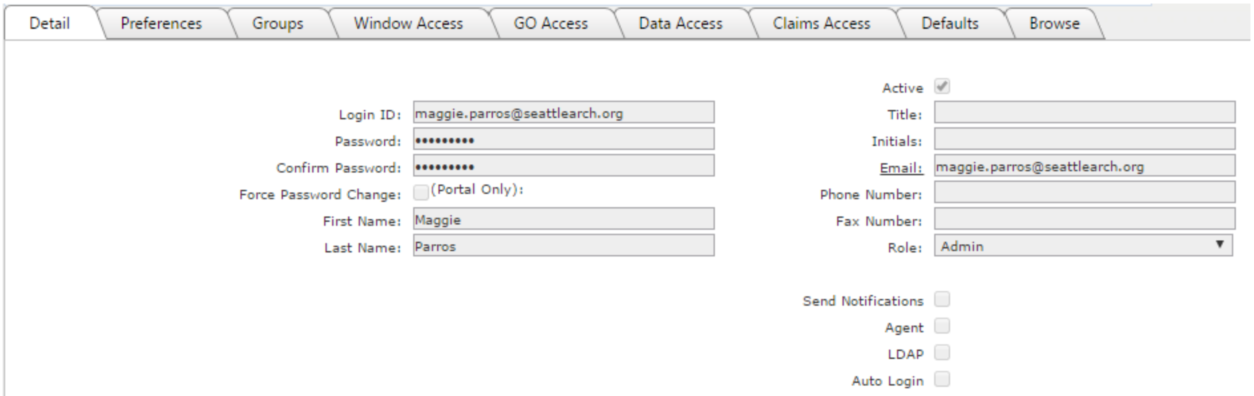
1. Type your search into the filtered box at the top of each row.

2. Click the  button to select an operator.

The list can be exported to excel at any time by clicking the  icon in the upper right corner.

USER MANAGEMENT

USER MANAGEMENT DETAIL TAB



Admin > User Management > Records / Detail Tab

Proper setup of user access can help minimize problems with your database, such as accidental or malicious errors, missing or incorrect data, and nonstandard formats or nomenclature. Each person who has access to RiskPartner should have a record in User Management.

Note Be certain that the address entered in the *Email* field is valid. This is one of the email addresses used by the system to send email. If the address is invalid, it causes an error for the service, and the message is not sent.

HOW TO ADD USER RECORDS

The Archdiocese of Seattle will manage users based on user groups. Individual users will be created by copying existing users.

1. Go to *Admin* > *User Management* > *Records / Browse* tab and use the queries (Active Admins or Active Portal Users) to find a user that belongs to the group for which you wish to add the new user.
2. Double click on the user in the browse tab or single click on the Login ID to bring you to the *Detail* tab of the selected User.
3. Click *Copy* on the RiskPartner toolbar to create a new user.
4. Type a unique *Login ID* — used to log in to RiskPartner. This will be the email address of the user.
5. Replace the Password and Confirm Password fields with *password*.
6. Replace the users First Name, Last Name, and Email Address.
7. If the Role is set to Admin, skip to step 11.
8. If the Role is set to Portal User, check the *Force Password Change* check box.
9. Click on the *Data Access Tab* and click the *Deny All* button.
10. Expand the location hierarchy using the arrows next to the listed locations and give rights for the user to the location by selecting grant access.

11. Click *Save* on the RiskPartner toolbar. The user will inherit rights and preferences based on the group tied to the copied user.

HOW TO INACTIVATE USER RECORDS

Archdiocese of Seattle Users will not be deleted from the system, but made inactive. To make a user inactive:

1. Go to *Admin > User Management > Records / Browse* tab and use the queries (Active Admins or Active Portal Users) to find a user that belongs to the group for which you wish to add the new user or once on the User Management window, use the quick search to find the user by Login ID.
2. Double click on the user in the browse tab or single click on the Login ID to bring you to the *Detail* tab of the selected User.
3. Click *Edit* on the RiskPartner toolbar.
4. Uncheck the Active check box on the user record.
5. Click *Save* on the RiskPartner toolbar.

USER MANAGEMENT PREFERENCES TAB

Path: Admin > User Management > Records / Preferences Tab

Use this Tab to give the user certain privileges similar to the *Admin > Client Info / Preferences* Tab. A few of the user-related fields are similar to the client preferences, but most are unique to an individual.

Click *Edit* on the RiskPartner toolbar and select your choice of the enabled options.

Time Zone. Select the user's time zone. In the database, all date-time fields on records created by users are stored as GMT (Greenwich Mean Time).

The application checks three hierarchy levels: User, Client Info, and default (U.S. Central Time zone). A time zone set for a User record has priority over the Client Info time zone.

If your organization spans different time zones, setting a User Time Zone assures an accurate reflection of local time. For example, if User A is set for GMT-06:00 and User B is set for GMT-05:00, each user will see his or her own time zone reflected in date/time fields.

Date Format. Select the user's preferred date format from the options available: MM/dd/yyyy; dd/MM/yyyy; dd.MM.yyyy; or yyyy/MM/dd.

Create Dashboard Control. With this option marked, the user can create controls for the Dashboard module.

Create Private Queries Only. For users who can create queries, this limits the query to their personal use.

Default Private Queries Only. This sets the default to limit queries to private when created by this user. This is similar to the *Admin > Client Info / Preference* option to *Default New Queries to Private*.

Delete or Modify all Documents. Check this box if the user is authorized to delete or modify any Linked documents that the

User has **not** created or attached to a record in the RiskPartner system.

Default Page Size for Grids. Type a value to set the number of line items that automatically display on various window grids.

Update user groups on LDAP login. This option is unavailable to most users.

User Management Groups Tab

Path: Admin > User Management > Records / Groups Tab

If you have set up Groups from *Admin > User Management > Groups*, use this Tab to assign a user to a particular group or groups. These assignments are also shown on the *User Management > Groups / Detail* Tab.

By applying this method, you can establish general privileges for a category and save time by assigning the group (and its related privileges) to many users.

After you assign a group, you can change some of the privileges for an individual user if desired.

HOW TO ASSIGN GROUPS TO USER RECORDS

If groups have been established using *Admin > User Management > Groups*, the information is available for selection from *Admin > User Management > Records / Groups* Tab.

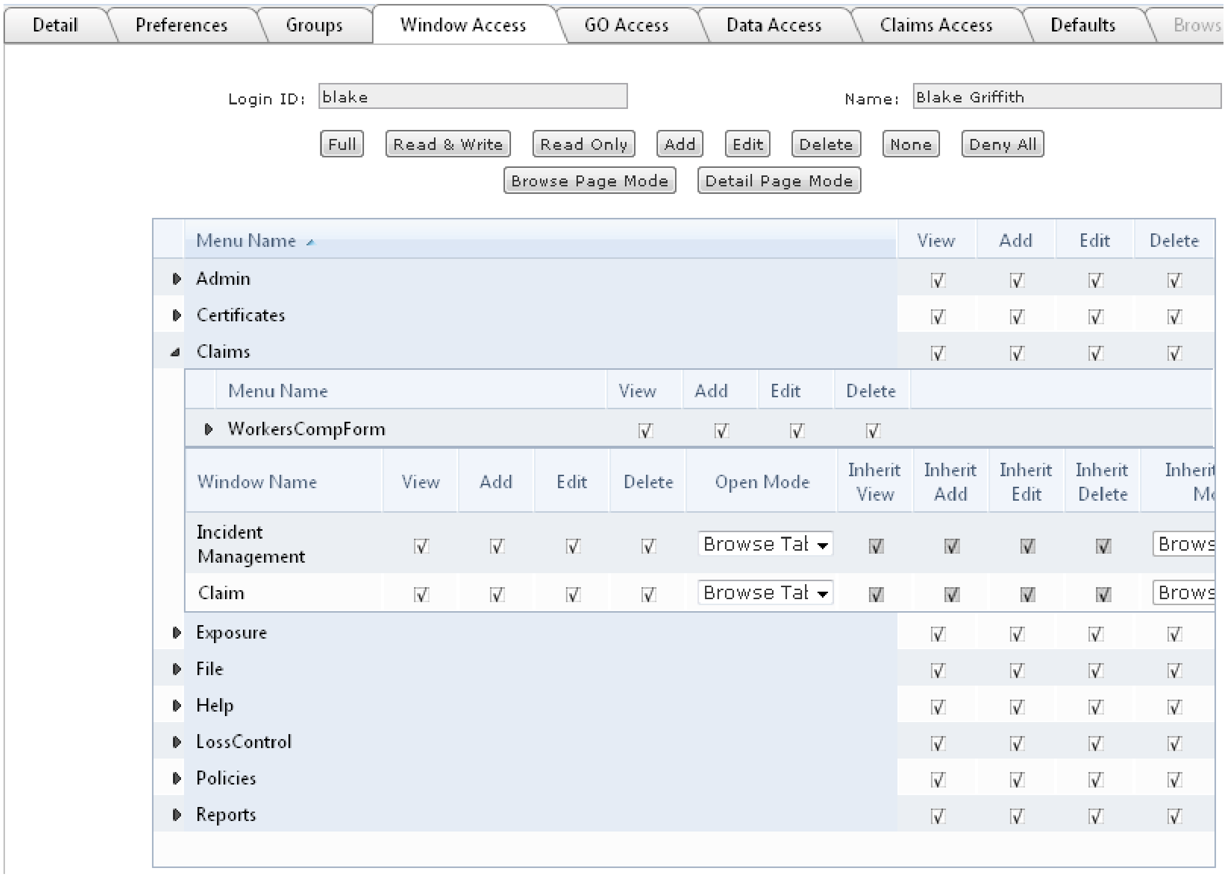
To Add Groups to a User:

1. Go to the desired User record.
2. Click the *Groups* Tab.
3. Click *Edit* on the RiskPartner toolbar.
4. Click the *Add User Group* link at the top of the grid.
5. Select the desired groups on the *Add User Group* popup window.
6. Click the *Save* button on the popup window. The popup window closes and the group is added to the underlying window.
7. Click *Save* on the RiskPartner toolbar.

To Delete Groups to a User:

1. Select the desired User.
2. Click the *Groups* Tab.
3. Click *Edit* on the RiskPartner toolbar.
4. Click the red X icon for the group line item.
5. Click *Save* on the RiskPartner toolbar.

USER MANAGEMENT WINDOW ACCESS TAB



Path: Admin > User Management > Records / Window Access Tab

The *Window Access* Tab allows you to limit the user's view and privileges to specific menus and windows. In addition, you can set the opening mode for some windows. The *Open Mode* selections include: Add, Detail, and Browse. Not all selections are available; it varies by the window chosen. Select Browse to display the *Browse* Tab of the module when it is opened. Select Add to open a module in *Add* mode ready to create a new record; this is the same as clicking *Add* on the toolbar.

Privileges to make changes to the *Window Access* Tab should be limited to RiskPartner Administrators. If you do give Users access to the Tab, any modifications they make are limited to those they have been granted. For example, if User 1 attempts to give an Add privilege to User 2 for which User 1 have View only, the only option available is View.

The window shows a tree list of the main menu options such as *Admin*, *Claims*, and *Exposure*. A series of check boxes on each line indicates whether the user has been granted privileges for various modes (*Add*, *Edit*, etc.) or has inherited settings from a group.

Use the buttons above the grid to grant or deny different combinations of privileges to all options at one time. Individual line items can be changed as needed. The next topic, Window Access Assignment Buttons, describes the use of each button.

Be sure to click the plus sign next to a menu name to view related submenus and privileges granted.

An X mark in the check box indicates the user has no access to the menu or to **some** of the privileges related to the window such as *Add*, *Edit*, and *Delete*.

A check mark in the box shows that access to the menu and some or all of the privileges have been granted.

A blank check box means that the user does not have these privileges, but the options could be granted to the user.

You can change privileges on an individual basis regardless of inherited settings.

Note: Be sure to expand the tree to see any other line item restrictions.

WINDOW ACCESS ASSIGNMENT BUTTONS

With a click of your mouse in *Add* or *Edit* mode, you can mark all the check boxes to grant or limit Window Access for all user records.

The following list defines the effects of each button.

Full	Click to check every check box for all columns at all levels.
Read & Write	Click to check the boxes in the View, Add, and Edit columns. The Delete column remains blank.
Read Only	Click to check the View column. All other columns are blank.
Add	Click to check the View and Add columns.
Edit	Click to check the View and Edit columns.
Delete	Click to check the View and Delete columns.
None	Click to clear marks (both and) from all check boxes.
Deny All	Click to deny the user access to any window. This is a fast way to set all access to Deny and manually grant access to a few windows.
Browse Page Mode	Click to make all Open Mode settings read 'Browse'.
Detail Page Mode	Click to make all Open Mode settings read 'Detail'.

Use these global settings to mark all check boxes quickly and then make changes where needed.

HOW TO ADD WINDOW ACCESS TO A USER RECORD

If you want to add or change some of the menu and window access privileges for a user:

1. Click the *Window Access* Tab on the desired user record.
2. Click *Edit* on the RiskPartner toolbar.
3. Click the button of your choice to mark all check boxes of your choice.

4. Click the plus sign of a *Menu Name* to expand the view to the submenus.
5. Click repeatedly to change choices for any check box.
6. Scroll down to look for other options in the *Open Mode* column.
7. Click the down arrow in the available fields to select a different opening option such as Add or Browse.
8. Click *Save* on the RiskPartner toolbar when you have completed window access assignments.

User Management Data Access Tab

Path: Admin > User Management > Records / Data Access Tab

Without specific access, a user cannot view any records in the database. The *Data Access* Tab consists of two lower Tabs: *Organization* and *Broker*. Similar to the *Window Access* Tab, the *Organization* Tab displays a tree list of the top hierarchy levels with adjacent arrows available to expand the tree and see lower levels in the hierarchy.

Privileges to make changes to Data Access should be limited to RiskPartner Administrators; however, if other Users have access to the window, any modifications they make are limited to those they have been granted. For example, if User 1 attempts to Grant a privilege to User 2 for which User 1 is denied, the only option available is Denied.

If a user is denied upper level access, any lower levels are also denied; however, you can grant upper level access and grant or deny selected lower level access.

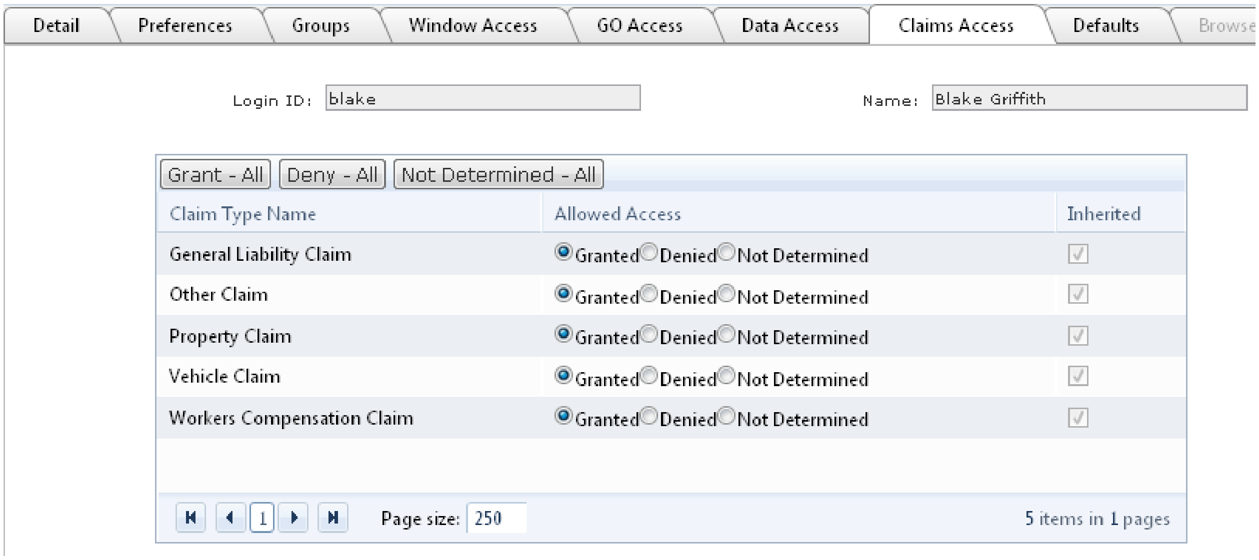
The *Broker* Tab on this window shows brokers for your organization. You can grant or deny access from the Tab. Note the *Inherited* column, which indicates a group setting if the user is assigned to a group.

To add or change settings on either Tab, click *Edit* on the RiskPartner toolbar, and click the desired access radio button. Remember to click the plus sign to expand the view to lower levels on the *Organization* Tab.

Click *Save* on the RiskPartner toolbar to save your changes.

Unless you grant access to some data lines, the user cannot see any records in RiskPartner.

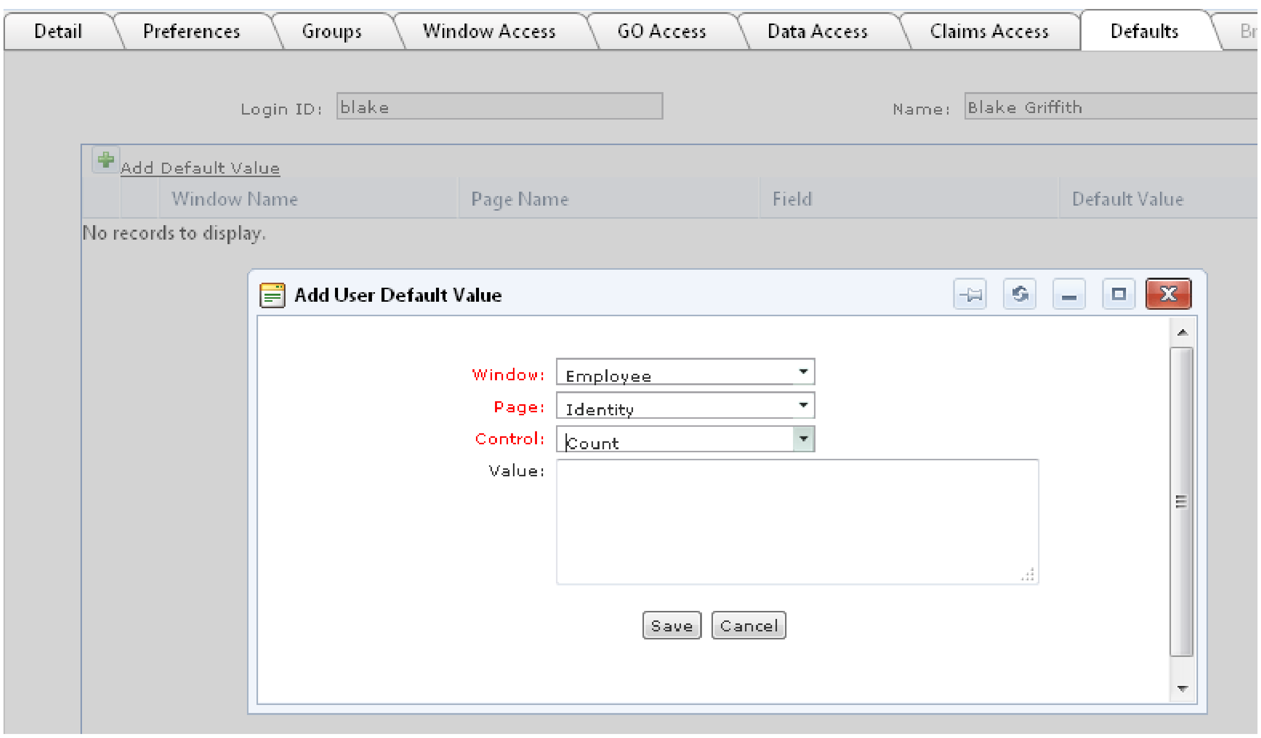
USER MANAGEMENT CLAIMS ACCESS TAB



Path: Admin > User Management > Records / Claims Access Tab

Use the *Claims Access* Tab to grant or restrict the given user's ability to view claims of various types.

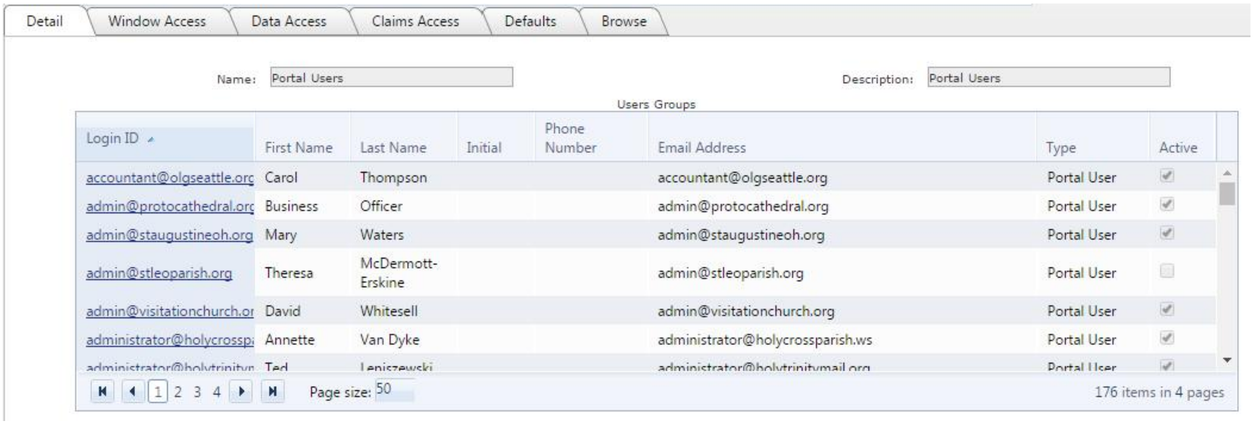
USER MANAGEMENT DEFAULTS TAB



Path: Admin > User Management > Records / Defaults Tab

Set default views and values for some of the windows the user is most likely to open and complete.

GROUPS



Path: Admin > User Management > Groups

The *Groups* window is used to set privileges for categories of users that you consider a unit within RiskPartner. The Tabs on this window are similar to the *User Management* window.

Use the *Groups* window to set access for existing users to menus, records, and functions by group category. This saves time when you create individual user records.

Make settings on the *Window Access* Tab and *Data Access* Tab one time for a Group, and the settings apply to any users assigned to that Group. Most features the for User Window Access Tab described on page 49 and Data Access Tab described on page 51 are available for Groups; **however**, changes made to an individual user's record override settings inherited from the Group.

Users are added to or deleted from the group on the *Groups / Detail* Tab. In *Add* or *Edit* mode, click the *Add User* link at the top of the grid to add a name. Use the icon to delete a user, or check as many boxes as needed and use the *Delete Selected* to remove several users as one time from this record. You can also assign a user to a group from the *Admin > User Management > Records / Groups* Tab.

Using Groups to grant privileges to categories of users, saves time, helps you maintain good data, and prevents errors.

GROUP RULES

Assigning group membership to users can speed the process of creating user records and assigning privileges. The group rules are as follows:

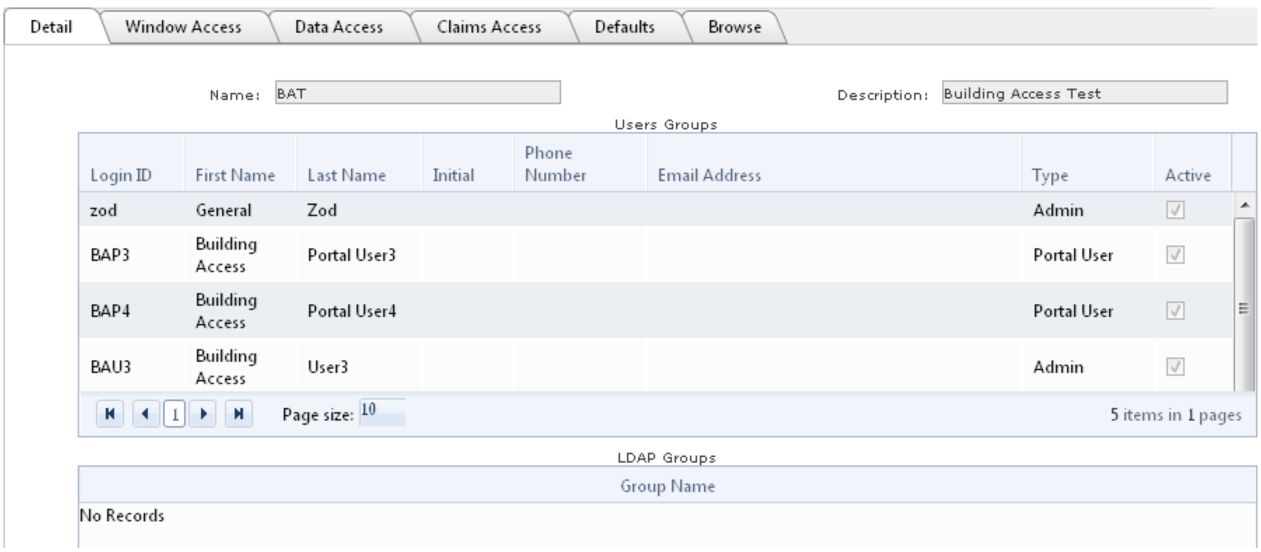
- A person can belong to one or more groups.
- A group can be established with privileges for specific Preferences, Menus, Windows, and Data.
- A group cannot contain another group.
- All group privileges and restrictions are inherited by each group member. For example, if the group has rights to a building, then all group members have rights to that building.
- A no access setting takes precedence when more than one group is assigned to a user. If a privilege is granted in one group and the user is assigned to a second group that denies the privilege, the user is not given the privilege. Use No Access only if the users in a group should not have access to a particular function.

The following table assumes the user has no privileges set from the user record. It illustrates how the no access principle works:

	Group 1 Settings	**Group 2 Settings**	**Privileges to User**
Window A	No Setting	Allow	Allow
Window B	Allow	No Access	No Access
Window C	No Access	No setting	No Access

You can override (add or deny) any group settings on an individual user's record. The settings in a user record always take precedence over settings from a group record. Whether you assign a group to a user before or after giving privileges to the user, the settings made from the user record always prevail.

Groups Detail Tab



Path: Admin > User Management > Groups / Detail Tab

The window is divided into two grids:

- List of users assigned to the group
- LDAP Groups (applicable if you use LDAP login)

You can define as many groups as needed for your organization.

All categories of users are assigned to a Group from *Admin > User Management > Records / Groups* Tab.

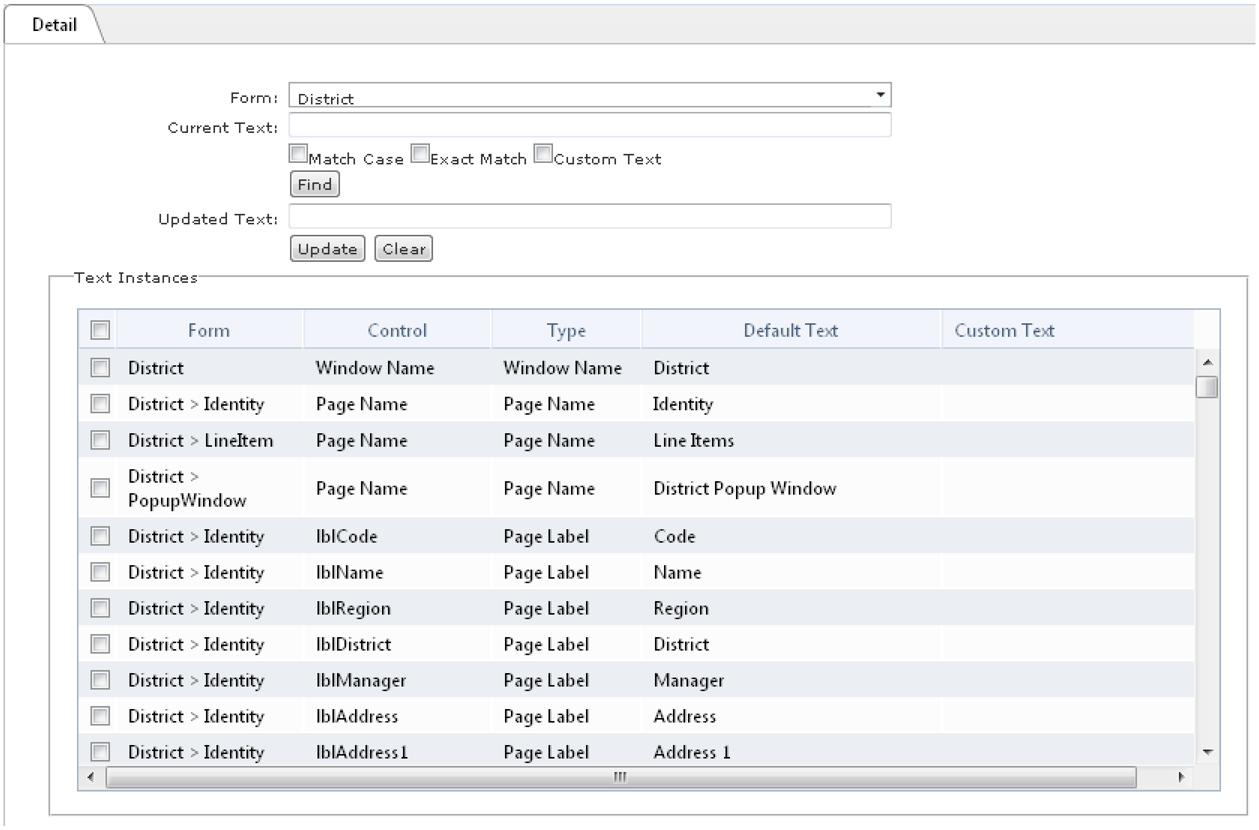
HOW TO ADD A GROUP RECORD

1. Click *Add* on the RiskPartner toolbar.
2. Type a group *Name*.
3. Type a *Description* of the group.
4. Click *Save* on the RiskPartner toolbar.

After a group record has been created, you must assign access. This is done using the other Tabs on the *Groups* window. Until these rights are assigned, users assigned to the group cannot open any windows in RiskPartner.

The *Defaults* Tab is used to establish the default settings on windows available to the Group.

TEXT MANAGEMENT



Path: Admin > Text Management

If you don't use the default hierarchy names (division, region, district, etc.) or other labels, you can change them to reflect your organization's terms using *Admin > Text Management*. Your new term appears in the *Custom Text* column on the window.

You have the option to change the nomenclature on a selected form or all references throughout RiskPartner. This includes buttons, toolbars, windows, tool tips, and any other place where the term occurs. **Use caution** if you elect to make global changes.

The window identifies the Form name, Control, Type, Default Text, and Custom Text.

Review each change carefully to be certain you have the correct form and type of control you want to change.

Note One exception to creating labels is the UDF (User Defined Fields) Tab. Each organization can create and use fields for their own purposes. The labels for these fields are created from the various Types in *File > Organization > Lookups*.

How to Change Labels in RiskPartner

Path: Admin > Text Management

Use these instructions to replace specific words on some or all RiskPartner forms.

1. (Optional) Select a Form if you want to limit changes to one form. Leave the field clear if you want to find all instances of the text entered in step 2.
2. Type the term or character string in the *Current Text* field.
3. (Optional) Click the appropriate check box to refine the search to *Match Case*, *Exact Match*, and *Custom Text*.
4. Click the *Find* button on the window, and RiskPartner returns a list of places where the term appears.
5. Type your revised text in the *Updated Text* field.
6. Click to mark the check box of all *Forms* you want to change. Note: Click the check box in the grid header (to the left of the *Form* label) to replace all instances of the term.
7. Click the *Update* button to replace the default term with your new term. Your new term is shown in the *Custom Text* column.
8. Click *Save* on the RiskPartner toolbar to save your change.

The new term is visible when you view any of the forms you checked.

How to Locate Changed Text Terms

To locate forms containing the new terms:

1. Navigate to *Admin > Text Management*.
2. Type the desired text in the *Current Text* field.
3. Click the *Custom Text* check box.
4. Click the *Find* button on the window.

All forms that contain your custom text are displayed.

How to Remove Changed Text Terms

1. Navigate to *Admin > Text Management*.
2. Type the desired text in the *Current Text* field.
3. Click to mark the check box of all forms you want to change.
4. Click the *Clear* button.
5. Click *Save* on the RiskPartner toolbar to save your change.

This removes your changes from the *Custom Text* column.

FORM ATTRIBUTES

Form Attributes are used to make changes to the default forms found in System Form Attributes, such as hiding fields and Tabs on a window.

Alternatively, you can use the *Custom Form Attributes* window to preserve the System Forms and create a new Custom Form based on a System Form. Custom Forms give you an additional function: Enabled.

System Form Attributes

The *System Form Attributes* window applies to the application forms. Use the window to change the availability or characteristics of fields and Tabs on a particular window.

Caution: Restrict access to this window. The RiskPartner System Administrator for your organization is the person who should make any changes. Ideally, your administrator consults with RiskPartner to determine what, if any, changes are needed.

Your System Administrator can make changes to meet the practices of the organization. Changes can be made during initial setup or at a later time.

The following list describes field options available for certain windows and fields:

- **Required.** Make the field a required entry, and prevent saving a record until the information is provided.
- **Enabled.** Allow data entry in the field. If the check box is clear, the field is raised and gray, but users can see the contents.
- **Visible.** Show the field or button on the window. If the check box is clear, the field is hidden from everyone's view.
- **Tab Stop.** Include or exclude the field as part of the tabbing navigation.
- **Dropdown.** Include a down arrow in the field so users can view a selection list.

HOW TO EDIT SYSTEM FORMS

The *System Form Attributes* window does not permit adding another System Form; therefore, *Add* is disabled on the RiskPartner toolbar.

Although you can cycle through the windows using the *First*, *Next*, *Previous*, and *Last* buttons on the toolbar, a faster way to locate a form is to use *Search*.

Search by window name; however, the form names have no spaces. If you search for a window name containing "Claim Value", RiskPartner returns "No records to display." If you search for "ClaimValue", RiskPartner returns the window name. The system also searches for partial words or phrases.

1. Search for the window you want to edit.
2. Click *Edit* on the RiskPartner toolbar.
3. Click to check or clear the fields or buttons for line items.
4. Click *Save* on the RiskPartner toolbar.

MYPAGE CONFIGURATION

Path: Admin > MyPage

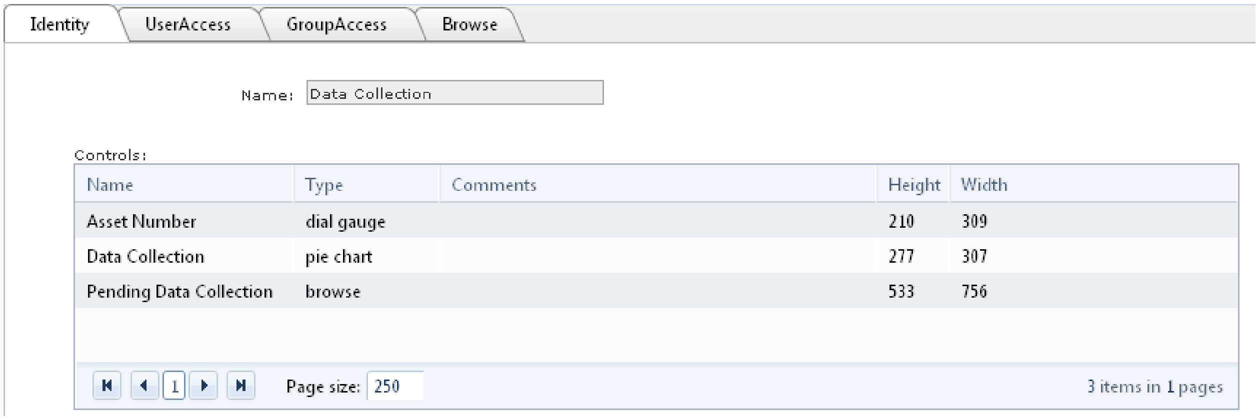
After creating Tabs and Controls from the MyPage Action Menu, the RiskPartner System Administrator can determine who has access to specific Tabs and the Controls on those Tabs.

The *MyPage* modules are used to control the Tabs a user or group can view as well as to restrict users' view of specific Controls on a Tab.

- Set the viewable Tabs from *Admin > MyPage > MyPage Tabs*.
- Set the viewable Controls on a Tab from *Admin > MyPage > MyPage Controls*.

Use the window to designate a standard MyPage for various categories of personnel.

MyPage Tabs



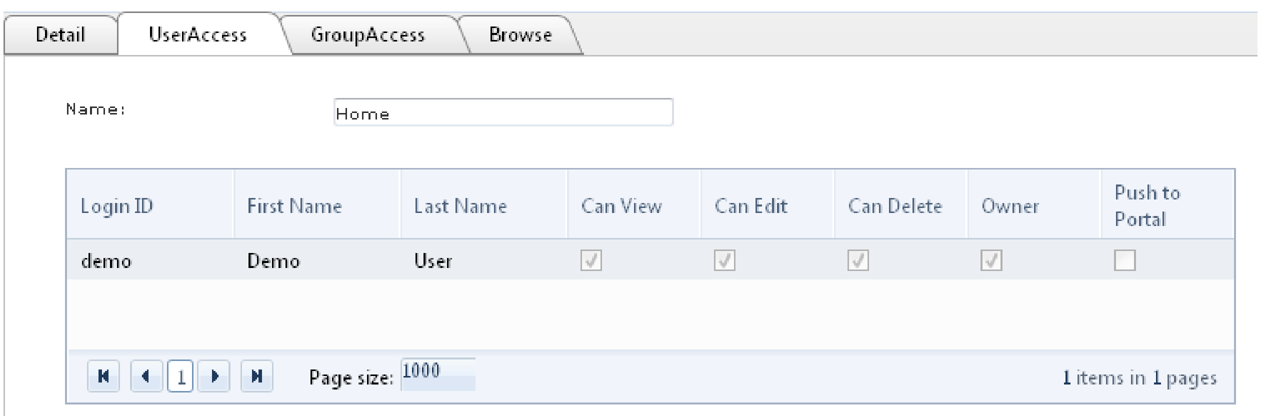
Path: Admin > MyPage > MyPage Tabs

By default, the user that creates the Tab can see the Tab and any controls created for it. Typically, this is the RiskPartner System Administrator.

The administrator can grant Tab viewing privileges to other users or to a group of users. The *Admin > MyPage Config > MyPage Tabs / Identity* Tab displays the controls for the selected Tab. A read-only *Type* field on the *Identity* Tab shows the type of control, such as Dial Gauge. The *Comments* field displays information included when you *Add* or *Edit* a new Control. Both these view-only fields (*Type* and *Comment*) are searchable.

This is a quick method to assign privileges to many users for one MyPage Tab.

User Access Tab



Path: Admin > MyPage > MyPage Tabs / UserAccess Tab

Open the record for the Tab you wish to modify. Go to the *UserAccess* Tab and click *Edit* to grant permission, on an individual basis, to view, edit, and delete the Tab. Anyone with a record in User Management is eligible for selection.

If you mark the *Owner* check box, that user can change access rights to the page for other users.

You also have the option to push the entire MyPage Tab to selected Portal users. In *Edit* mode, check the *Push to Portal* box to change the user's portal MyPage. When the Tab is pushed, it overwrites any Controls the user has set on their current Portal MyPage. Reminder: The Portal MyPage accommodates a single Tab; therefore, only one Tab can be pushed to the Portal.

GROUP ACCESS TAB

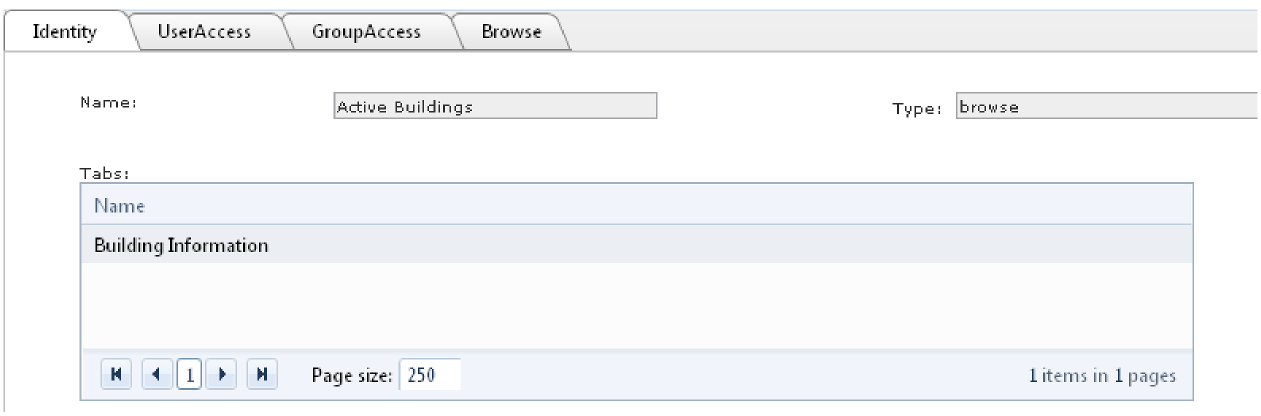
Path: Admin > MyPage > MyPage Tabs / GroupAccess Tab

Use the *GroupAccess* Tab when you want to make a Tab available to a large number of users at one time. These are the same Groups established using *Admin > User Management > Groups*. From the *Group Access* Tab, you can allow the same view, edit, delete, and owner privileges to groups that are found on the *User Access* Tab.

Group access requires a setting in the *Default Order* field. Type a sequence number in this field.

The *Default Visibility* check box determines if the Tab appears the first time a user logs in after receiving access. If the group does not have permission to edit MyPage, check the *Default Visibility* box. If the group has edit access, set the Default Visibility based on the importance of the information on the Tab. In other words, mark the check box for Tabs with high-priority information. Leave the check box clear for Tabs that are optional and only need to be loaded if the user is searching for the information.

MYPAGE CONTROLS



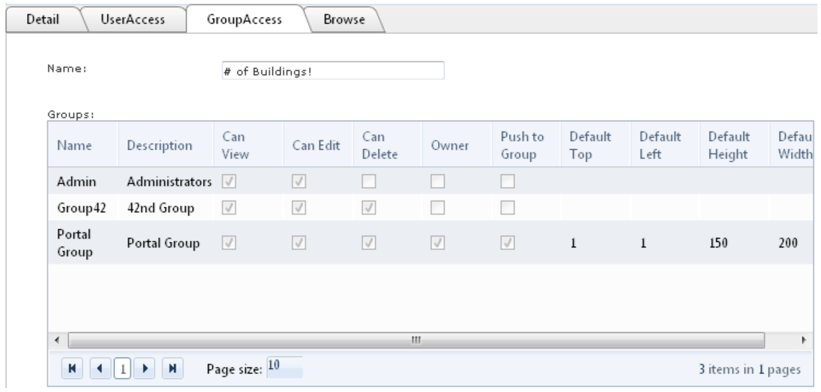
Path: Admin > MyPage > MyPage Controls

When a user or group is given permission to see a Tab, you can restrict their view to a limited number of Controls on the Tab. By default, all people who have permission to view the Tab can see all the Controls on that Tab.

The *MyPage Controls / Identity* Tab displays all the Tabs that show the selected Control.

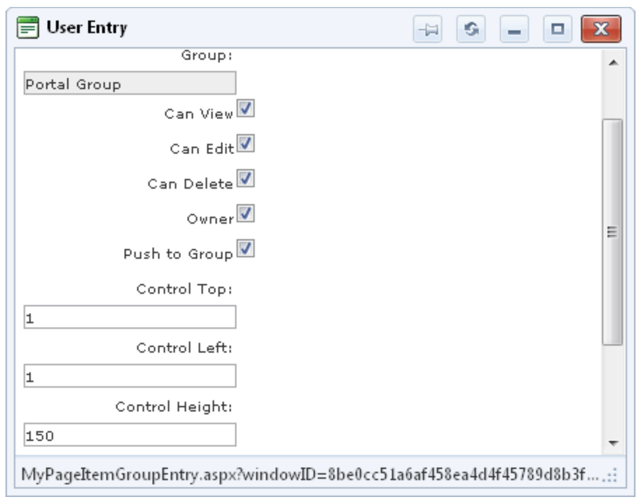
Open the Control you want to restrict, and use *User Access* Tab in *Edit* mode to grant permission, on an individual basis, to see the Control. Anyone with a record in User Management is eligible for selection.

MYPAGE CONTROLS FOR GROUP ACCESS



Path: Admin > MyPage > MyPage Controls / GroupAccess Tab

Use the *Group Access* Tab when you want to restrict the view of a Control for a large number of users at one time. These are the same Groups established using *Admin > User Management > Groups*.

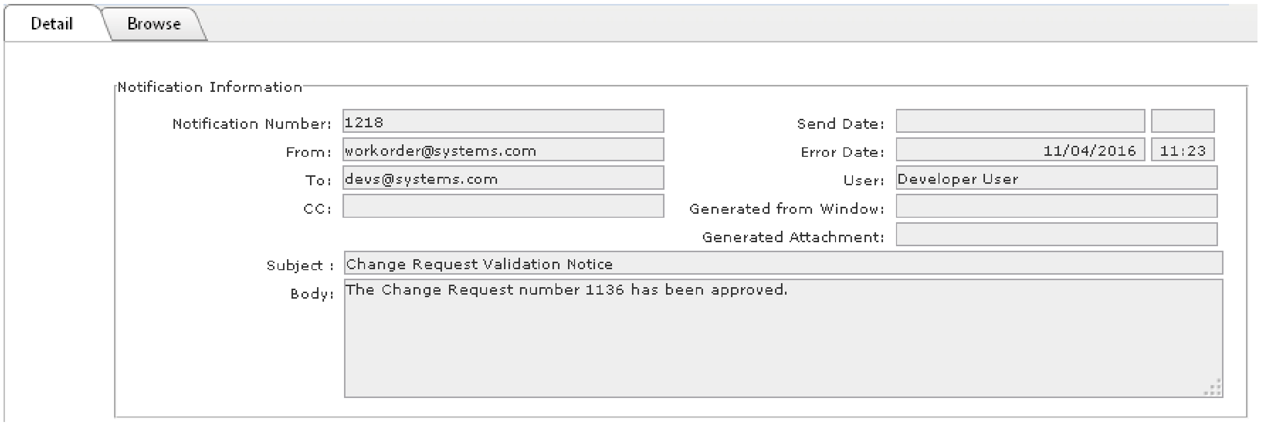


In addition to selecting the control and the privileges, the RiskPartner System Administrator also has the option of specifying the size and position of the control when it is displayed. This feature is especially important when a Portal Group is designated.

For Portal Groups, the RiskPartner System Administrator also designs the full layout of the Dashboard for the Portal Home Page. Since each control is created separately for the Portal, it is useful to keep a record of the size and position of each Control as you assign it to the Portal. Once assignments are made and the *Push to Group* check box is marked, all Portal users in the Group see the Dashboard controls.

Note that not all types of controls are available for Portal Dashboards, for example, Browse controls cannot be added to a Portal Dashboard.

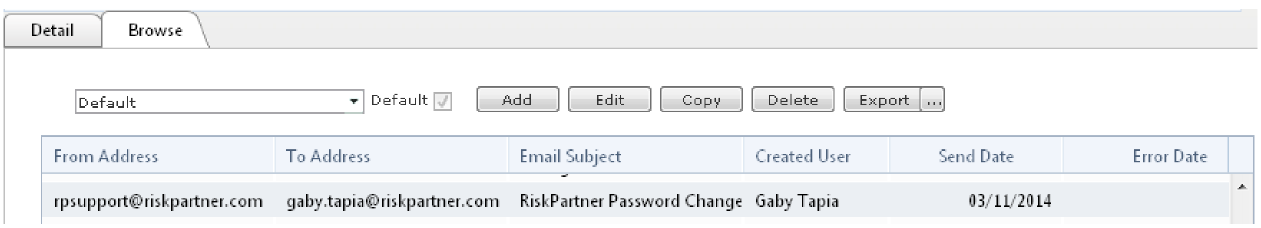
EMAIL LOG



Path: Admin > Email Log / Detail Tab

The *Email Log* window displays information about any e-mail sent from within RiskPartner.

For example, copies of MyPage threshold breach notices and certificate letters that were sent (including the contents of the letter in the *Body* field).



Path: Admin > Email Log / Browse Tab

The *Browse* Tab lists all the e-mail messages that have been sent or attempted even if an error occurred.

You can sort by the columns to help you locate messages of interest, such *Send Date*.

ORGANIZATIONAL FUNCTIONS

GENERAL REFERENCE

The following tips explain visual cues on the interface in different modes.

Required fields. In *Add* mode, required field labels are red. While this is the minimum amount required to save a record, at least some elective information needs to be added to make the record meaningful for casual users.

Disabled Tabs. In *Add* mode, Tabs that are unavailable for viewing display as dimmed with a line drawn through the tab label.

Edit records. When you have created and saved a record, you can change or add information in *Edit* mode. When you click *Edit* on the RiskPartner toolbar, the fields and Tabs available in *Add* mode are once again open to data entry. If information becomes available or changes at a later time, edit the record to make additions or corrections.

Save buttons on popup windows. Many popup windows accommodate saving several line items before returning to the underlying Tab. This is done by using the selection options associated with the *Save* button. Click the selection icon ... to choose from *Save & Clone*, *Save & Add*, or *Save & Close*.

Cancel an action. Changes or new records are not recorded to the database until you click *Save* on the RiskPartner toolbar. If you open a record in *Add* or *Edit* mode, click the *Cancel* button on the RiskPartner toolbar to exit the record without saving additions or changes.

Navigator. Selections on the Navigator, the vertical pane on the left, are shortcuts to RiskPartner windows. One exception is the Action Menu. This category contains supplemental commands, particularly useful when creating Favorites, MyPage, and Dashboard entries. Your Navigator selection, such as Claims, Policies, or Reports remains constant until you click a new title from the list at the bottom of the pane.

COMMON FEATURES

Some Tabs and check boxes are used with many RiskPartner windows. Included in these are:

- Active check box
- Additional Interests
- Brokers
- Claims
- Contacts
- Item Schedule
- Historical Values
- Policies
- Status History
- UDF
- Visible check box

This Common Functions document describes the use of these features in detail.

ORGANIZATION OPTIONS

The menu options available from *File* > *Organization* are used by the RiskPartner System Administrator to set up basic data such as:

- Lookup Types

- Organization Record
- Division Records

Lookup Types

Types are used to categorize or group items to enhance the search, sort, and reporting capabilities. The Type field is often required in the associated record.

Using easily recognized categories specific to your organization is vital to setting up types. The tree list in the left pane identifies general types. You can always add more categories to a type if needed.

The names of types are sensitive to any custom text you select. If you have changed your nomenclature using *Admin > Text Management*, it is reflected in the Types labels.

Lookup Subtypes

Subtypes are an optional part of the Types table relationship and are only available with some Lookup records. They are used to categorize records and can be used to filter records and generate reports.

Subtypes are not required. Moreover, overuse of subtypes can be a hindrance to efficient operation of your system. If in doubt, do not establish subtypes.

LOOKUP TYPE DEFINITIONS

Path: File > Organization > Lookups

Additional Interest Types – Define the third-party types who may have an interest in the claim or loss. Examples: Financial, Legal.

Aircraft/Watercraft Types – Create general grouping names for your air- or watercraft.

Area Types – If you use Area records for areas within Buildings, establish the Types and Subtypes on this window.

Asset Types – Establish general categories of your assets. Examples: Chairs, Desks, Copier, Printers.

Attendee Types – Group the kinds of employees accounted for in the records. Examples: employee, non-employee.

Building Extended COPE List Values – Extended COPE is intended for use by clients in hurricane/flooding zones. On the *Browse* Tab, select the *Control Description*, then click *Edit* and create the *Possible Values* you want to use.

Building Types – Delineate the uses of the building by establishing the Building Type. Examples: Academic, Athletic, Commercial.

Carrier Types – Set up the general categories using Carrier Types.

Cause of Loss Types – Broad groups of losses are used with Cause of Loss Types and are associated with claims. Examples: Collision, Fire, Collapse.

Certificate Types – Define the type of certificate required such as Insurer's Certificate.

Certificates of Currency Limits – Set all the limits used in Certificates of Currency from this window.

Claim Types – Establish the types of claims you make. Examples: Property, Auto, Workers Comp. If needed, check the *Occurrence Only* check box to link specific Claim Types directly to Occurrences, bypassing the *Case* window. If not marked, the claim is instead linked to Occurrences only through the Case grid on the *Occurrence* window.

Claim Value – The Claim Value window is used to define the Claim Costs and Type of cost per claim.

Construction Types – Construction types apply to structures such as buildings. Examples: Fire Resistive Non-combustible, Protected Combustible, and Unprotected Combustible.

Country – Set up the names of countries where you do business.

Coverage Types – Establish the general types of coverage. Examples: Business Auto, Excess Casualty, Fine Arts.

Data Collection Types – Data Collection Types define the purpose of data collection. For example, to add an item, edit an item, or remove an item.

Department Types – Use the Department Types window to establish department categories.

Driver Types – List the types of drivers insured. Examples: Commercial and Non-Commercial.

Employee Types – Classify employees such as Administrative, Marketing, and IT. These are assigned at the Location level.

Equipment Types – Define general categories for large items. Examples: Boilers, Elevators, HVAC, Grounds.

Event Types – Establish the types of events insured. Examples: Conference, Meeting, Athletic.

Fine Art Types – Delineate the different types of art. Examples: Paintings-Oils, Painting-Water Color, Sculpture.

Incident Types – Categorize the types of insured incidents. Examples: Property Damage, Auto Accident, Employee Illness.

Inspection Form Types – Determine the types of inspections performed, for example, Yearly Safety Check.

Inspection Point Types – List the types of items to be inspected. Examples: Fire Safety, Structural.

Linked Document Categories – Linked Document Categories establish the type of documents that can be attached to records. The category names are added to individual Subtabs on the *Downloads* window of the Portal. When you add a linked document, use the *Category* field to select which Subtab the document is displayed on. The sequence in which these names display on the *Browse* Tab is also the sequence they display in the Portal.

Location Types – Define the use of the given location. Examples: Office, Storage, Retail.

Loss Recommendation Types – Define the ways to avoid losses. Examples: Fire\Life Safety, Property Modification, Training\Educational.

NCCI Body Part – Create records of body parts subject to injury that are the same terms used by the NCCI (National Council on Compensation Insurance).

NCCI Injury Nature – Create records of injuries that are the same terms used by the NCCI (National Council on Compensation Insurance).

Occupancy Types – This type is associated with building COPE information. Examples: Assembly-Fixed Seating, Educational, Factory-Moderate Hazard.

Occurrence Type – Create the categories you want to use to sort the different claims Occurrence records. These can be further distinguished by establishing Subtypes.

Other Fire Protection – This type is associated with building COPE information. Example: Fire Extinguisher.

Payroll Types – Use this type to organize the various types of payroll. You have the option of adding an NCCI code, which will automatically populate on records when the associated Payroll type is selected.

Policy Types – Categorize the kinds of policies. Examples: Fiduciary Liability, Excess Property, and General Liability.

Priority – This type is associated with loss recommendations. Examples: Emergency, Urgent, Moderate, Deferred.

Project Type – This type is related to the Certificates module. Projects are a way to review compliance for a specific event or capital undertaking that may involve many Providers, Requirements, and Certificates.

Protection Class Types – This type is associated with building COPE information.

Provider Types – Use this window to establish the types of providers used in Certificates. Examples of Provider Types are contractors, franchisees, tenants, and vendors.

Provider Work Status – The terms defined here are available from the *Work Status* field on the *Provider / Detail* window. Add statuses such as Approved, Hold Payment, Do Not Permit Work Onsite. You can add any status that meets the needs of your organization. It **does not substitute** for the Compliance Status.

Provisional Loss Estimate – Use this window to define the risk ratings, ranges, and values per rating to determine the end value of the provisional loss estimate in the Insurable Risk Profiles.

Questionnaire Question Groups – Use this type to categorize questions used in questionnaires, for example, Automobiles.

Requirement Form Types – Use this window to establish the types of certificate requirement forms.

Risk Types – Establish the types of risks encountered. Examples: Life Safety, Fire Safety, External Audit.

Roof Construction Types – Show the types of roofs insured including square footage cost. Examples: Metal, Wood Shingle, Slate, BUR.

SOC Form Types – Use this Type to establish the categories of SOC Forms.

Status – Set the selection types to indicate why the record has not been closed. Examples: Open, Closed, Deferred. Note that these can be applied to more than one of the Transaction Types shown. Mark the check box of each Transaction Type that applies.

Training Course – Create general categories of training. Examples: Driving Safety, Human Resources.

Tutorial Question Groups – Tutorial Groups define the types of groups you can use to arrange questions in a tutorial.

Vehicle Class – Identify the types of vehicles. Examples: Commercial, Commercial Chauffeur.

Vehicle Maintenance Types – Categorize vehicle maintenance actions. Examples: Oil Change, Tire Rotation, Tune-up.

Vehicle Types – Define the vehicle types. Examples: Sedan, Truck, Van.

ORGANIZATIONAL HIERARCHY

The organizational hierarchy reflects the data structure for your organization and is used to roll up reporting data to view information at each level of your hierarchy.

ORGANIZATION

Path: File > Organization > Organization

Organization is the highest level in the organizational hierarchy and represents the whole of fund view for the Archdiocese of Seattle.

DIVISION

Path: File > Organization > Division

Divisions are the level below the Organization in the organizational hierarchy. Use the *Division* window to create division records. Only three fields are required to create a division record:

Code – Enter a unique alpha-numeric identifier for the division. This is used in other records a as a way to reference the division.

Organization – Select Archdiocese of Seattle.

Name – Type the full name of the division.

****WARNING** –** Inactivating a division record will inactivate all location records associated with the division.

LOCATION

Path: Exposure > Property > Location

Locations are the lowest in the organizational hierarchy. Use the *Location* window to create location records. Locations are also seen as exposures and as such, details on how to add or modify location records can be found under the Exposures section of the manual.

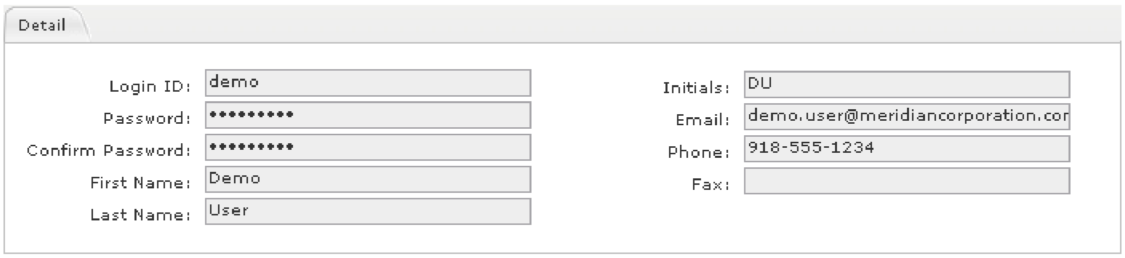
RSS FEEDS

Path: File > RSS Feeds

RSS Record is a manually recorded URL to external reference or news feeds.

RSS System Feed displays data from selected RiskPartner forms. For example, selected columns from the Incident Management window can be established as an RSS feed and displayed on MyPage.

CURRENT USER INFORMATION

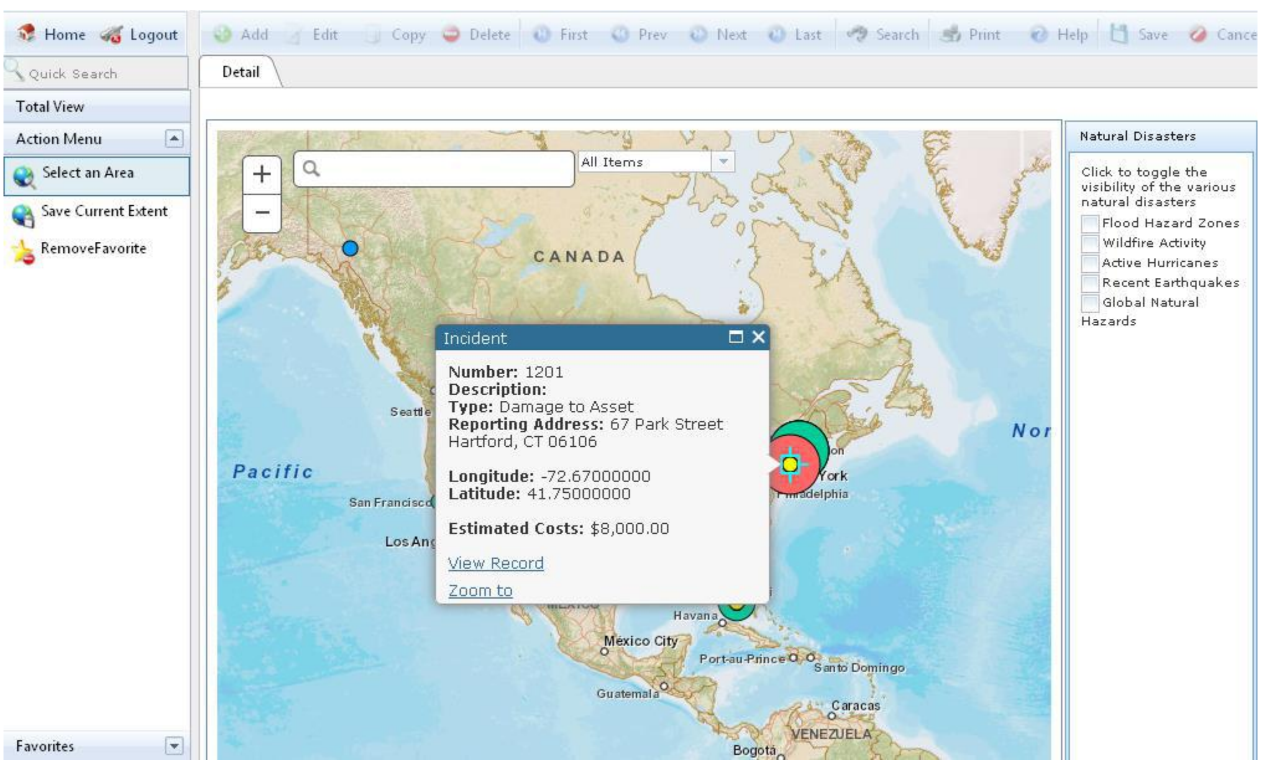


Path: File > Current User Information

The *Current User Information* option is a convenient way for the person who is logged in to review or change information about their record such as Password, Email address, and Phone.

The information is based on the established defaults for the person who is logged in. These defaults are set by the RiskPartner System Administrator from *Admin > User Management*.

GIS



Path: File > GIS > GIS Map View

The GIS (Geographical Information System) optional purchase module allows you to see your data in a geospatial format. Use this module to map all your Buildings, Locations, Claims, and Incidents in a single map with ESRI Hazard overlays (Flood, Wildfire, Hurricane, Earthquake, and Global Natural Hazard overlays).

Zoom in or out on the map, and click specific locations for a popup window that lists details about the area such as claim number, type, address, and longitude/latitude.

TASK MANAGER

Path: File > Task Manager

The *Task Manager* window allows you to assign tasks to yourself or other users. Once the window is completed, you can create a MyPage Control to display all the tasks assigned to you.

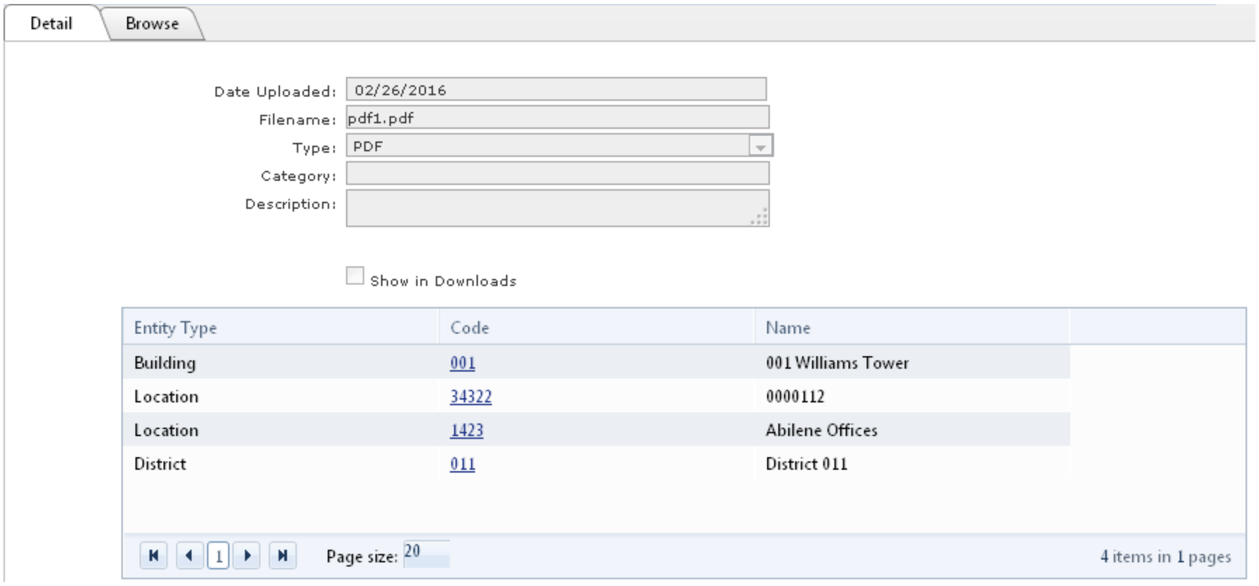
When you create the Dashboard Control, the only action required is to select the *Type* as MyTasks. Any tasks for the selected *User Login ID* display on the saved Control.

If you have the appropriate privileges, you can create Task names for other user logins. If a MyTask Control exists, the control displays all the tasks assigned when the selected user logs in.

Use the *Start Date*, *Reminder Date*, and *Due Date* fields to indicate expected progress on the task. If an address is entered in the *Email* field, you can automatically receive an email with information about the job on the date entered in the *Reminder Date* field.

When tasks have been accomplished, enter a *Completion Date* on the *Task Manager* window.

LINKED DOCUMENT MANAGER



Path: File > Linked Document Manager

The *Linked Document Manager* window gives RiskPartner administrators a central place to manage application-wide linked documents.

Each record shown on the window is a linked document that exists inside RiskPartner, and each record detail shows the underlying record it is attached to.

Use the *Download File* link in the Action Menu to download the linked document on a per-record basis. On the *Browse* Tab for this window, you can create a query and click the *Download These Records* button to download a zip file containing all the linked documents selected by the query.

If checked, the *Show in Downloads* check box makes the document viewable for Portal users in the *Downloads* section of the Portal. Availability of the downloaded file depends on the hierarchy level associated with the linked document.

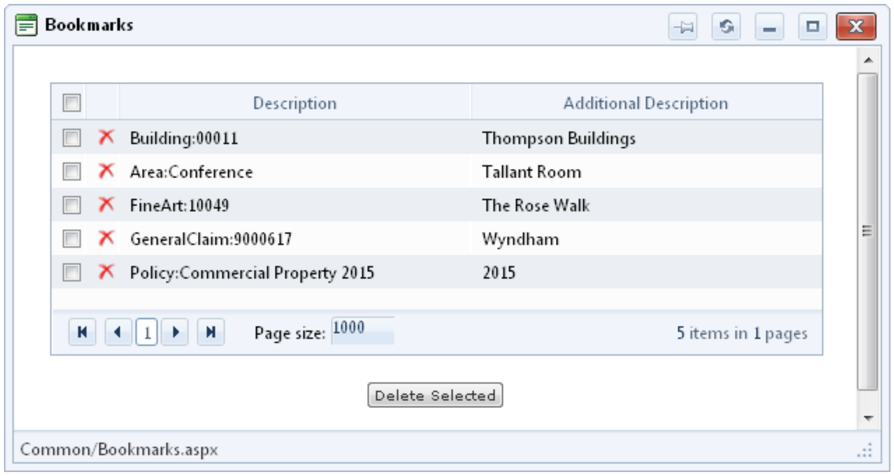
If the box is checked and the file is attached to a Building or other exposure item that can attach to a Building (Equipment, Assets, Vehicles, Drivers, etc.), a user with access to the Location associated with the Building can view the file in the Portal *Downloads* section.

If the box is checked and the file is attached to a Location, users with access to the Location can view the files in the Portal *Downloads* section.

If the box is checked and attached to a District, anyone with access to a Location under the District can view the file in the Portal *Downloads* section, even though they do not have rights to the District.

Files attached at levels higher than the District do not show in the *Downloads* section on the Portal.

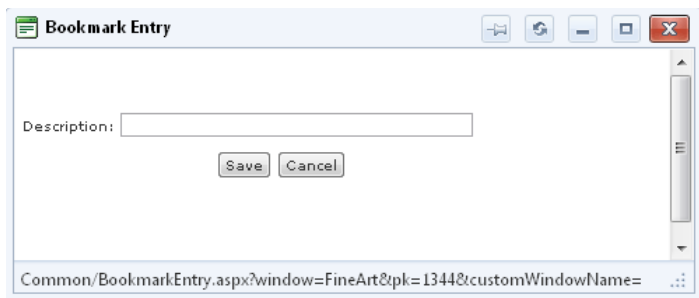
BOOKMARKS



Path: File > Bookmarks

The *Bookmarks* popup window gives you quick access to a specific record.

Line items on this popup are created from the desired record when you click the *Add Bookmark* link on the Action Menu for windows that can be bookmarked. The link displays below the *Add/Remove Favorite* link and is useful for opening records that you use frequently.



To create a bookmark:

1. Open a record you want to view frequently.
2. Click the *Add Bookmark* link on the Action Menu.
3. (Optional) Enter a *Description*.
4. Click the *Save* button.

To launch a bookmarked record:

1. Click *File > Bookmarks*.
2. Scroll to locate the record.
3. (Optional) Move the cursor over the list to see the tooltip description.
4. Double-click a line to launch the bookmarked record.

When you open the *Bookmarks* popup window, the line shows [window name]:[item number], such as FineArt:10049. Double-click the line to open the Fine Art record #10049. If you have added a description of the bookmark, your text displays in the *Additional Description* column. You can move the cursor over the line to see your description as well.

When the bookmark is no longer needed, click the red icon to delete it.

To remove several bookmarks at once, click the check box adjacent to multiple lines, and click the *Delete Selected* button on the *Bookmarks* window.

PRINT COMMAND

Path: File > Print

The *Print* command is available from any window. Use this command to grab a screenshot of the page in view. You have the option to select various printers or formats connected to your computer. For example, if you have the ability to print to an Adobe .pdf format. Be sure to select a Landscape orientation to capture the full page.

For any other type of print job, use the *Print* button on the RiskPartner toolbar.

BACK AND FORWARD COMMANDS

Path: File > Back or *File > Forward*

Use these commands to move to previously opened windows. For example, if you open:

- a Location record followed by
- an Asset record, and finally
- an employee record

You can use the *Back* command to move sequentially backward through the just-visited records.

Once you have moved back one or more records, the *Forward* command is available to progress in the same sequence. For example, you open:

- an Incident Management record followed by
- a Claim record, and then
- a Policy record

Once you use the *Back* command from Policy to Claim to Incident Management, you can use the *Forward* command to move from the Incident Management record through the Claim record to the Policy record. Movement to each record requires you repeat the command.

EXPOSURE MANAGEMENT

PROPERTY

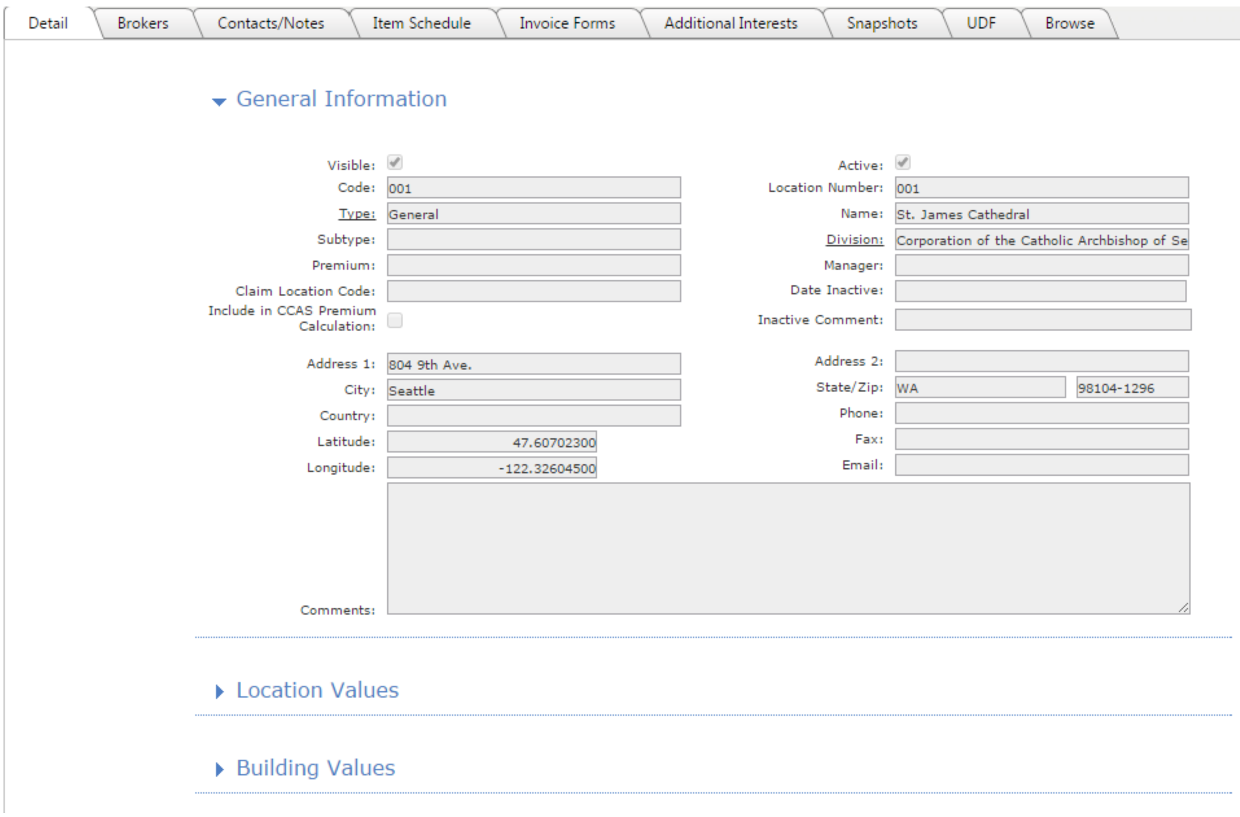
Use the options found in *Exposure > Property* to create database entries for the following:

Location – This represents the Parish/Church level for the Archdiocese of Seattle.

Building – Buildings are physical structures associated with a Location. Vacant Land is also recorded at this level.

LOCATION WINDOW

Location Detail Tab



Path: Exposure > Property > Location / Detail Tab

Information stored on a Location Record includes name, type of location, contact information, along with invoice and broker information related to the location. The window is designed to allow you to show or hide sections and avoid extensive scrolling. To see the contents of a section, click on the arrow or anywhere within the section. Do the same thing to hide the section contents. The following sections are found on the *Location / Detail* Tab:

- General Information
- Location Values – Where # of FTEs is stored
- Building Values – List and totals for associated buildings
- Total Values – Grand Totals for the Location
- Departments – Not used for Archdiocese of Seattle

- Claims – Future Use
- Incidents – Future Use
- Policies – Lists Policies associated with the Location

Values roll up to this level from the Building Level.

The required fields on this Tab are:

Code – Type a unique identifier for the location. This is a required field.

Type – Select the appropriate location type. These categories are created in *File > Organization > Lookups > Location Types*. Archdiocese of Seattle currently sets all records to the type of *General*.

Name – Type the full name of the location.

Division – Select the affiliated Division. This is a required field.

Address 1 – The main address for the Location

City – The city in which the location resides

State – The state in which the location resides

Zip – The zip code in which the location resides

Location Detail Field Definitions

General Information Section

Visible – By default, this check box is marked. Clear it to prevent the location from being seen in reports.

Active – By default this check box is marked. Clear it when the location is no longer part of your holdings. For data integrity, the information is retained in the data base, but when the *Active* check box is clear, the Location does not display in selection lists.

Premium – Archdiocese will NOT use this field as this will be calculated for the location and stored on the invoice.

Manager – Type the name of the location manager.

Claim Location Code – This is the location code used by the TPA or the carriers for claims.

Date Inactive – This field is completed automatically by RiskPartner when you clear the *Active* check box and save the record.

Inactive Comment – The reason the record is no longer active.

Claim Location Code – Type the number assigned to this location by your broker or city. (For Future Use)

Include in CCAS Premium Calculation – Check the box if the location is to be included in the CCAS Premium Calculation.

Address Contact fields – Most of the fields are self-evident in this section.

Latitude and **Longitude** – The system automatically completes these fields when a complete address is entered and the record is saved.

Location Values Section

The Archdiocese of Seattle stores the FTE for the location in the Location Values Section of the location record. This information will be updated via the Import Wizard.

Building Values Section

The values of any properties associated with this location display here.

Total Values Section

The totals of the Location Values and Building Values display here.

Departments Section

This section will not be used by the Archdiocese of Seattle

Claims Section

The Claims section shows a list of all claims linked to this Location record. Claims cannot be added from this form.

Incidents Section

The Incidents section shows any incidents that have occurred at the location.

Policies Section

Use the Policies section to add or remove policies that apply to a Location record. The policies available for selection are those that have been added from *Policies > Policy*.

How to Add Location Records

To add new Location records:

1. Click 

 on the Exposure section of the Action Menu or follow the menu path.
2. Click *Add* on the RiskPartner toolbar.
3. Complete all required fields. These are identified by red labels. Note: Some required fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.
4. (Optional) Complete elective fields as needed.
5. Click on the Broker Tab
6. Click *Add Broker*
7. Select *AJG* and click *Save* on the Broker Entry Window
8. Click *Save* on the RiskPartner toolbar.

Upon adding a new location only the user that added the record will have rights. To give rights to all other administrative users follow these instructions:

1. Go to the Admin > User Management > Groups menu.
2. Click on the *Admin* User Group to bring you to the detail tab of the group.
3. Click *Edit* on the RiskPartner Toolbar

4. Click on the Data Access Tab

5. Click the *Grant All* button on the Organization Tab.

6. Click *Save* on the RiskPartner Toolbar. Users may need to log out and back in before seeing user access changes.

How to Edit Location Records

To edit Location records:

1. Click Location on the Exposure section of the Action Menu or follow the menu path.

2. Use *Search* on the RiskPartner toolbar or the *Browse* Tab to find the desired record.

3. Click *Edit* on the RiskPartner toolbar.

4. Make needed changes to the record. Reminder: All required fields must be completed.

5. Click *Save* on the RiskPartner toolbar.

How to Inactivate a Location Record

To make a Location record inactive:

1. Click Location on the Exposure section of the Action Menu or follow the menu path.

2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.

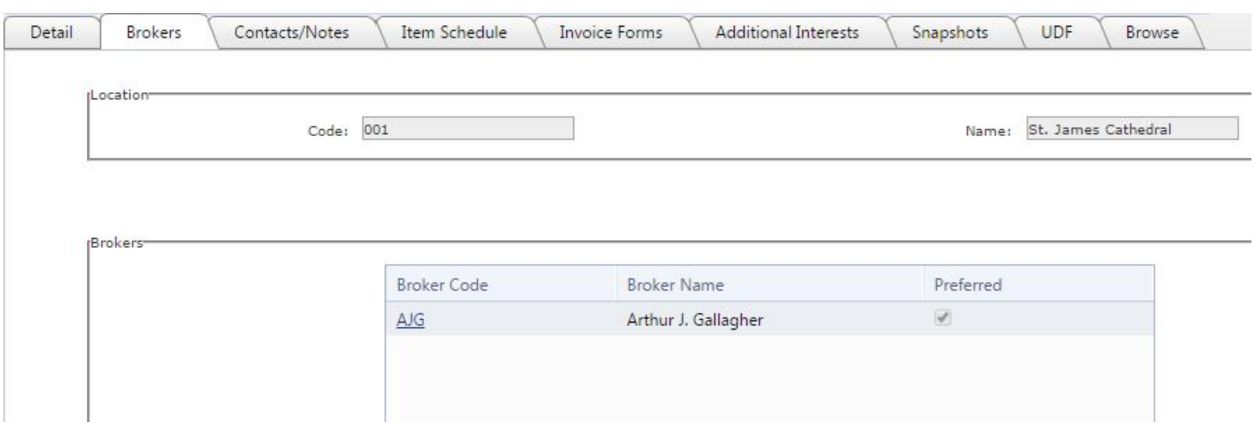
3. Click *Edit* on the RiskPartner toolbar.

4. Click the *Active* check box to clear it.

5. Click *Save* on the RiskPartner toolbar.

****Warning**** - Inactivating a Location will inactivate all building and other records associated with the location.

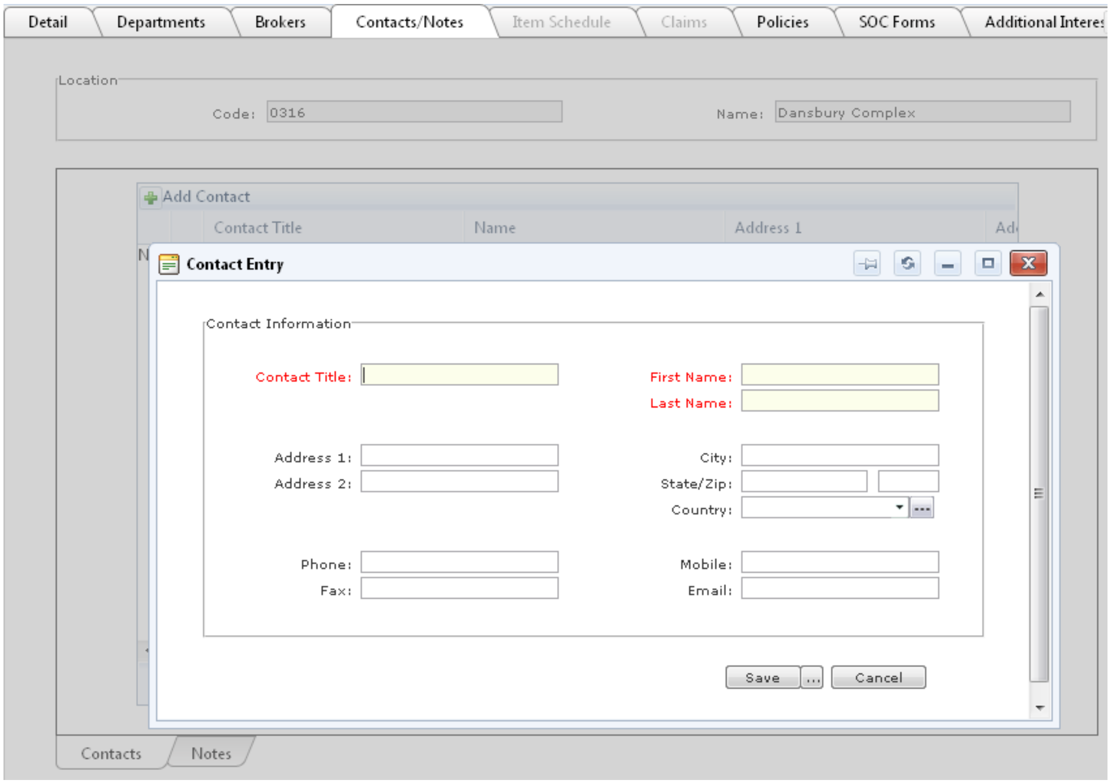
Location Brokers Tab



Path: Exposure > Property > Location > Brokers Tab

The AJG Broker record should be added to each location for the Archdiocese of Seattle.

Location Contacts/Notes Tab



Path: Exposure > Property > Location > Contacts/Notes Tab

Contact information is updated in RiskPartner from this Tab.

Contacts are people who can be consulted about specific information regarding a given location.

HOW TO ADD CONTACTS/NOTES TO LOCATION

To add or edit Contacts to Location records from the desired record:

1. Click *Edit* on the RiskPartner toolbar.
2. Click the *Contacts/Notes* Tab.
3. Click the *Add Contact* link on the window.
4. Complete the *Contact Entry* popup window.
5. Click the *Save* button on the window. *
6. Click *Save* on the RiskPartner toolbar to save the record.

* If you have several contacts to add, use the *Save & Clone* or *Save & Add* options on the popup to create several contacts before you save the Location record.

Location Item Schedule Tab

The read-only *Item Schedule* Tab shows vehicles and Doctor Schedules related to the Location. When a Location is assigned to an item from the item record, the item is listed on the *Item Schedule* Tab of the linked Location.

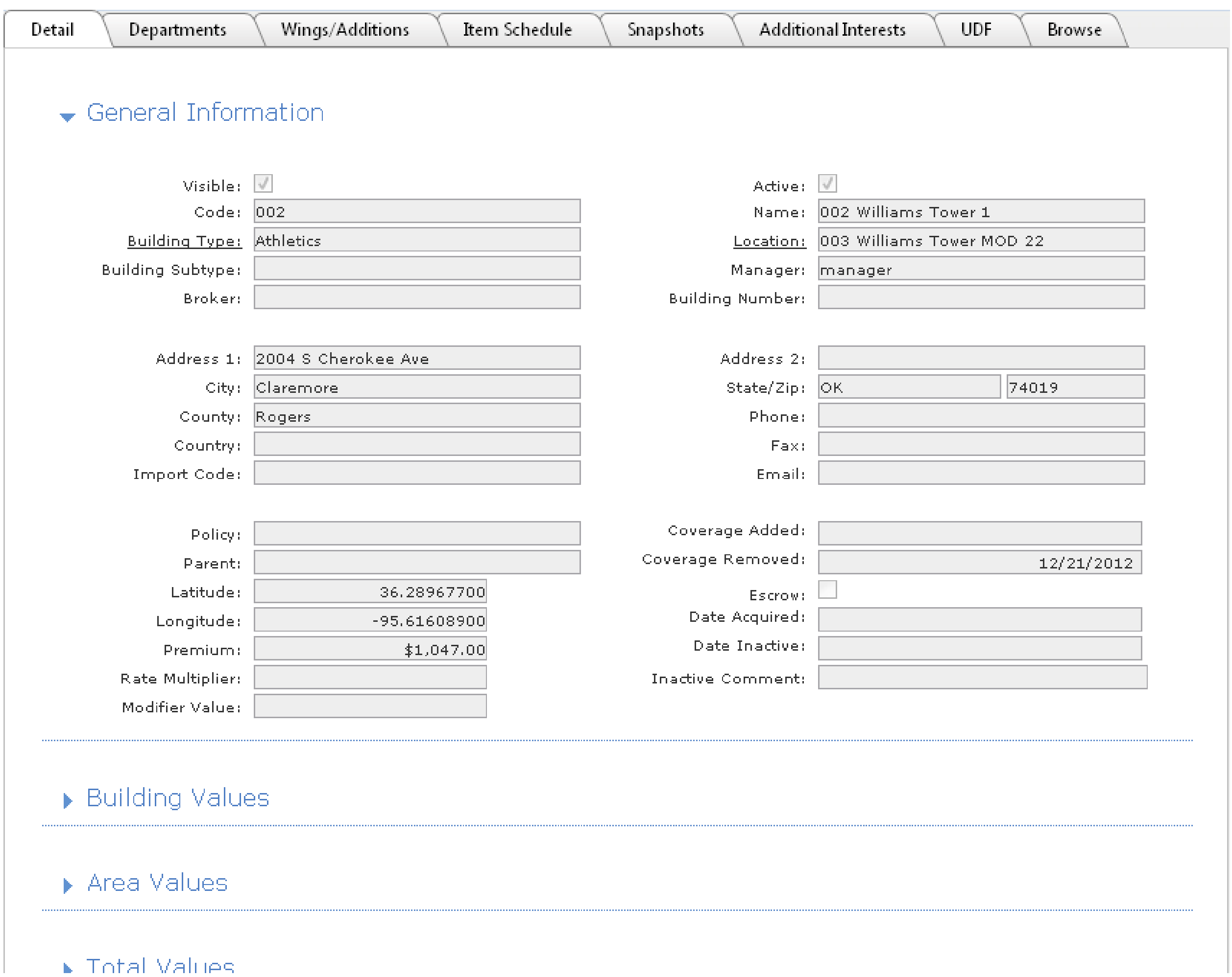
Refer to the *Item Schedule* Tab to review any items that are linked to the Location. For example, if you add a vehicle in the *Vehicle* window and assign it to Location ABC, the ABC record *Item Schedule* Tab lists the vehicle.

The *Location / Item Schedule* Tab includes three grids. The first shows all assets lower in the hierarchy that are linked to the location. (Not used by Archdiocese) A separate grid breaks out Vehicles, Aircraft/Watercraft, and Drivers (Only Vehicles used by Archdiocese), and a third grid lists Employees, Rates, Doctor Schedules and Payroll that are linked to the Location record (Archdiocese only uses Doctor Schedules).

Location Invoice Forms Tab

A list of the Invoice records associated with a location is displayed on the read-only *SOC Forms* Subtab. From this Subtab you can view which records are active or effective dates, when it was generated, and when it expires.

BUILDING



Path: Exposure > Property > Building / Detail Tab

Building records include address information, associated monetary building values, COPE information, along with a field for general comments. The window is designed to allow you to show or hide sections and avoid extensive scrolling. To see the contents of a section, click on the arrow or anywhere within the section. Do the same thing to hide the section contents. The following sections are found on the *Building / Detail* Tab:

- Building Values
- Area Values
- Total Values
- Construction
- Occupancy
- Protection
- Exposure
- Extended COPE
- Claims
- Incidents

The *Building / Detail* Tab reflects specific location information such as street address, as well as the building manager and contact, policy number, latitude/longitude, and loss values specific to your organization.

The required fields on this Tab are:

Code – Type a unique identifier for the building.

Building Type – Select the appropriate building type. These categories are created in *File* > *Organization* > *Lookups* > *Building Types*.

Name – Type the full name of the Building.

Location – Select the location with which the building is affiliated.

Note An essential Building field is the *Comments* field. This field is located in the *Occupancy* section.

Building Detail Field Definitions

General Information Section

Visible – By default, this check box is marked. Clear it to prevent the record from being included in reports.

Active – By default, this check box is marked. Clear it when the building is no longer part of your holdings. For data integrity, the information is retained in the data base, but when the *Active* check box is clear, the building does not display in selection lists.

Building Subtype – Select the building subtype if one exists. If used, these are part of the Building Type record.

Broker – Select the broker assigned to insuring this building.

Manager – Type the name of the Building Manager.

Building Number – Enter the number assigned to this building.

Address/Contact fields – Most of the fields are self-evident in this Section.

Policy – Select the policy number that covers this building.

Parent – If this building is part of a larger building complex, it may be considered a "child" of the main complex. If so, select the name of the "parent".

Coverage Added – Select the date coverage was added for this building.

Coverage Removed – Select the date coverage was removed for this building.

Latitude and **Longitude** – The system automatically completes these fields when a complete address is entered and the record is saved.

Premium – Enter the portion of the overall premium attributed to this building.

Rate Multiplier – Enter the rate used to allocate the premium.

Modifier Value – Like the Rate Multiplier, this value is used in similar methods for accounting/premium allocation purposes.

Included in CCAS Calculations – Check the Included in CCAS Calculations box if the Building is to be included in CCAS Calculations.

Acquired Date – Type or select the date the building was acquired.

Date Inactive – This field is completed automatically by RiskPartner when you clear the *Active* check box and save the record.

Inactive Comment – Add any needed information about making the record inactive.

Building Values Section

Values Fields – Your organization determines the field labels and the number of fields they want to see in these fields.

Content Included – Mark this check box if the content is included in the coverage.

Incl'd in Parent – Mark this check box if coverage is included in the Parent coverage.

Content Value – Enter the monetary value of the building contents.

Property Value – Enter the monetary value of the property itself.

Total Insured Value – This read-only field is the total of all insured value fields for the building.

Area Values Section

The grid displays any values from related Area records that apply to this building.

Total Values Section

The Total Value field shows the total value of all the Area Values fields.

Construction Section

Store and review information about the construction of the building. The information helps you in planning upgrades or loss recommendations and also helps carriers determine coverage.

If the *Roof Cost per Sq Ft* field is populated on the *Roof Construction Type* record in *File > Organization > Lookups*, that information populates the related field in the *Construction* section. If the roof cost field is already populated, RiskPartner will not overwrite the existing data. The value is added when a new record is created, but it can be modified at any time.

Occupancy Section

Store and review information about the occupancy of the building. The information helps you in planning upgrades or loss recommendations and also helps carriers determine coverage.

Protection Section

Store and review information about the protective measures in or outside the building. The information helps you in planning upgrades or loss recommendations and also helps carriers determine coverage.

Exposure Section

Store and review information about the external exposures of the building. The information helps you in planning upgrades or loss recommendations and also helps carriers determine coverage.

Extended COPE Section

Extended COPE is intended for use by clients in hurricane/flooding zones. Each Extended COPE field is a drop down list, and the values are specified from *File > Organization > Lookups > Building Extended COPE*.

Claims Section

The Claims section shows a list of all claims linked to this Building record. Claims cannot be added from this form.

Incidents Section

The Incidents section shows any incidents that have occurred at the building.

How to Add Building Records

To add new Building records:

1. Click 

on the Exposure section of the Action Menu, or follow the menu path.
2. Click *Add* on the RiskPartner toolbar.
3. Complete all required fields. These are identified by red labels. Note: Some fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.
4. (Optional) Complete elective fields as needed.
5. Click *Save* on the RiskPartner toolbar.

How to Edit Building Records

To edit Building records:

1. Click 

on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.
4. Make needed changes to the record. Reminder: All required fields must be completed.
5. Click *Save* on the RiskPartner toolbar.

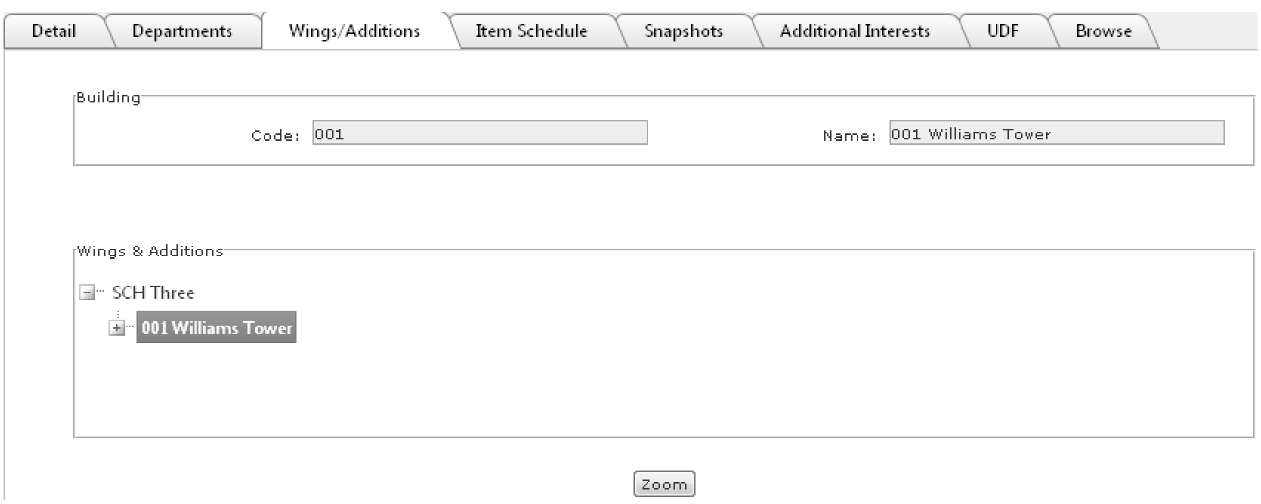
How to Inactivate Building Records

To inactivate Building records:

1. Click 

on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.
4. Uncheck the Active check box.
5. Click *Save* on the RiskPartner toolbar.

Building Wings/Additions Tab



Path: Exposure > Property > Building / Wings/Additions Tab

The read-only *Wings/Additions* Tab is for information only and gives you a hierarchical view of any additions to the Building. Click the plus sign to display related wings or additions. Click the *Zoom* button to view the records.

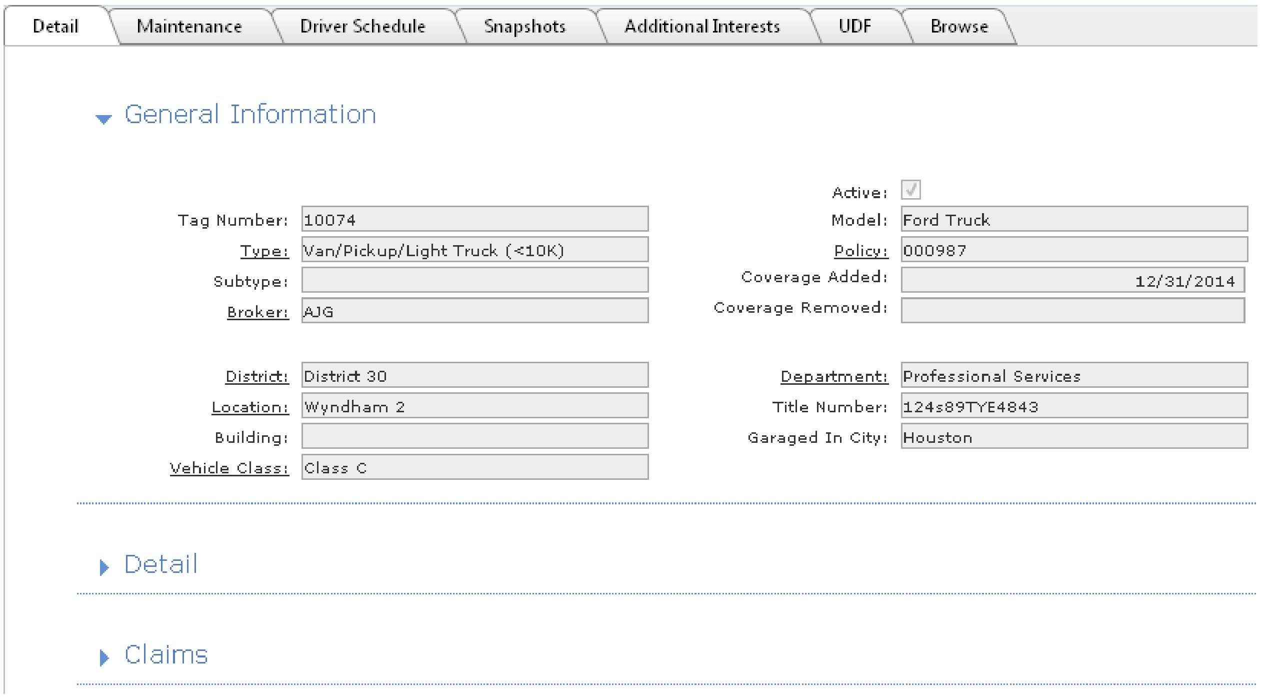
Building Item Schedule Tab

The read-only *Item Schedule* Tab shows items related to the Building. When a Building is assigned to an item from the item record, the item is listed on the *Item Schedule* Tab of the linked Building.

Look to the *Item Schedule* Tab to review any items that are linked to the Building. For example, if you add a vehicle from the *Vehicle* window and assign it to Building XYZ, the XYZ record *Item Schedule* Tab lists the vehicle.

The *Building / Item Schedule* Tab includes three grids. The first shows all assets lower in the hierarchy that are linked to the building. A separate grid breaks out Vehicles and Drivers, and a third grid lists Employees, Attendees, Training, and Payroll linked to the Building record.

VEHICLE



Path: Exposure > Fleet > Vehicle / Detail Tab

The *Vehicle* window is used to store information about all your insured vehicles. A Vehicle record must be linked to a Location. You have the option to enter extensive details about the vehicle or merely the required fields.

The required fields on this Tab are:

Tag Number – Type a unique identifier for the vehicle. The tag number may be set as an automatic vehicle counter in Client Info.

Type – Select the appropriate vehicle type. These categories are created in *File > Organization > Lookups > Vehicle Types*.

Broker – Select the broker assigned to insuring this vehicle.

Location – Select the location with which the vehicle is affiliated.

Make – Type the make of the vehicle, such as Dodge.

Model – Type the vehicle model, such as Ram 2500.

Year – Type the year of manufacture.

VEHICLE DETAIL FIELD DEFINITIONS

General Information Section

Subtype – Select the vehicle subtype if one exists. If used, these are part of the Vehicle Types record.

Building – Select the building with which the vehicle is affiliated.

Vehicle Class – Select the class of vehicle. These are set up in *File > Organization > Lookups > Vehicle Class*.

Description – Type a descriptive name of the vehicle.

Policy – Select the policy number that covers this vehicle item.

Coverage Added – Select the date the vehicle was insured.

Coverage Removed – Select the date the vehicle was no longer insured.

Department – Select the department responsible for the vehicle.

Title Number – Enter the vehicle's title number.

Garaged In City – Type the city where the vehicle is kept.

Detail Section

Under Svc Contract – Check this box if you have a service contract on the vehicle.

Leased – Check this box if the vehicle is leased rather than owned.

Out-of-Service – Check this box if the vehicle is not currently in use.

State Tag # – Type the number of the state-issued auto license.

VIN – Enter the unique Vehicle Identification Number.

Seat Capacity – Type the number of passengers the vehicle holds.

Personal Use – Check this box if the vehicle is designated for personal use.

Farm Use – Check this box if the vehicle is used for agricultural purposes.

Comments – Type any needed information about the vehicle in this free-form field.

Purchase Price – Type the amount originally paid for the vehicle.

Depreciated Value – Enter the current value based on your preferred method of depreciation.

Insured Value – Type the amount for which you insured the vehicle.

Replacement Value – Enter the cost to replace the vehicle.

Premium – Enter the portion of the overall premium attributed to this vehicle.

Rate Multiplier – Enter the rate used to allocate the premium.

Modifier Value – Like the Rate Multiplier, this value is used in similar methods for accounting/premium allocation purposes.

Gross Vehicle Weight – Enter the total weight of the vehicle.

Turning Radius – Type the numeric value for the tightest turn the vehicle can make.

Original PO # – Type the order number used when the vehicle was purchased.

Date Inactive – This field is completed automatically by RiskPartner when you clear the *Active* check box and save the record.

Date Purchased – Select the date you bought the vehicle.

Last Appraisal Date – Select the date the vehicle was last appraised.

Next Appraisal Date – Select the date the vehicle is scheduled to be appraised next.

Claims Section

The Claims section shows a list of all claims linked to this Vehicle record. Claims cannot be added from this form.

How to Add Vehicle Records

To add new Vehicle records:

1. Click  on the Exposure section of the Action Menu, or follow the menu path.
2. Click *Add* on the RiskPartner toolbar.
3. Complete all required fields. These are identified by red labels. Note: Some fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.
4. (Optional) Complete elective fields as needed.
5. Click *Save* on the RiskPartner toolbar.

How to Edit Vehicle Records

To edit Vehicle records:

1. Click  on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.
4. Make needed changes to the record. Reminder: All required fields must be completed.
5. Click *Save* on the RiskPartner toolbar.

How to Inactivate Vehicle Records

To inactivate Vehicle records:

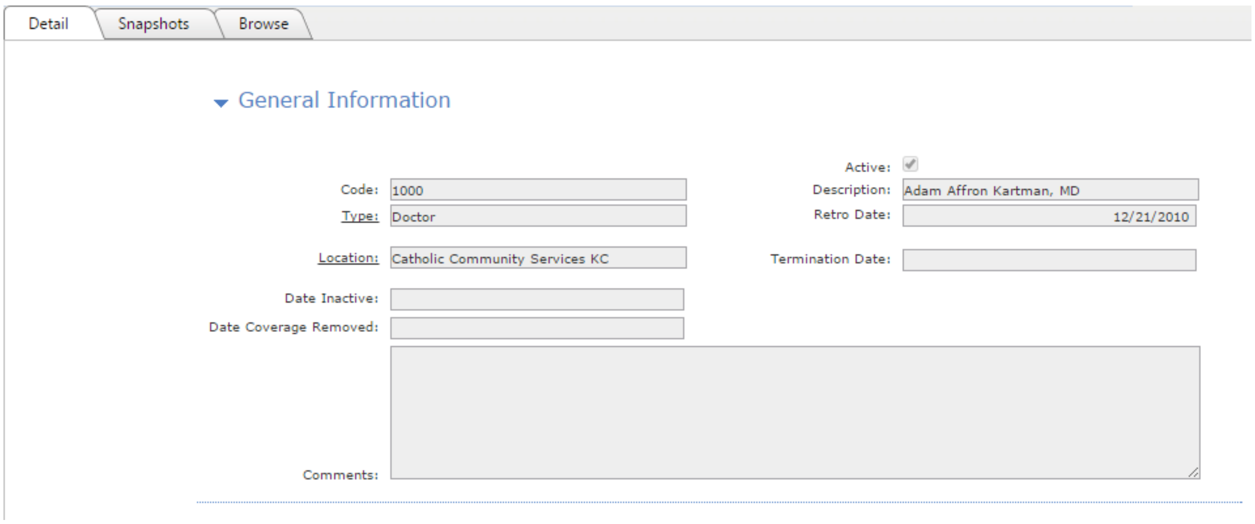
1. Click  on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.

3. Click *Edit* on the RiskPartner toolbar.

4. Uncheck the Active check box.

5. Click *Save* on the RiskPartner toolbar.

DOCTOR SCHEDULES



Path: Exposure > Personnel > Doctor Schedule

Doctor Schedule records include an auto-counted code, the Description/Name of the Doctor, a Retro Date, and the associated location.

The required fields on this Tab are:

Code – Type a unique identifier for the record. (Auto-Counted)

Type – Select Doctor.

Description – Type the full name of the Doctor.

Location – Select the location with which the Doctor is affiliated.

Doctor Schedule Detail Field Definitions

General Information Section

Active – By default, this check box is marked. Clear it when the Doctor is no longer associated with the location. For data integrity, the information is retained in the data base, but when the *Active* check box is clear, the building does not display in selection lists.

The Claims section shows a list of all claims linked to this Building record. Claims cannot be added from this form.

How to Add Doctor Schedule Records

To add new Doctor Schedule records:

1. Click 

on the Exposure section of the Action Menu, or follow the menu path.

2. Click *Add* on the RiskPartner toolbar.

3. Complete all required fields. These are identified by red labels. Note: Some fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.
4. (Optional) Complete elective fields as needed.
5. Click *Save* on the RiskPartner toolbar.

How to Edit Doctor Schedule Records

To edit Doctor Schedule records:

1. Click Doctor Schedule on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.
4. Make needed changes to the record. Reminder: All required fields must be completed.
5. Click *Save* on the RiskPartner toolbar.

How to Inactivate Doctor Schedule Records

To inactivate Doctor Schedule records:

1. Click Doctor Schedule on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.
4. Uncheck the Active check box.
5. Click *Save* on the RiskPartner toolbar.

NUMBER OF FTES

Path: Exposure > Property > Location > Identity Tab > Values Section

# of FTEs are stored on the location record in RiskPartner. Only administrators should modify # of FTE data. FTE data can be modified manually from the location record or can be updated en masse using the Import Wizard.

How to Manually Edit # of FTE Data

To edit #of FTE data:

1. Click Location on the Exposure section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar or the *Browse* Tab to find the desired record.
3. Click *Edit* on the RiskPartner toolbar.

4. Edit the # of FTEs field in the Location Values section.

5. Click *Save* on the RiskPartner toolbar.

Uploading # of FTE data:

1. To update # of FTEs en masse, navigate to http://login.riskpartner.com/importwizard and login with the same Admin login, password and client you use for the application.

2. Click on the icon to browse to the FTE spreadsheet provided outside of RiskPartner in .xlsx format.

3. Once you have found the file, click the *Submit* button.

4. Use the dropdown to select *Location* for the Import Item Type.

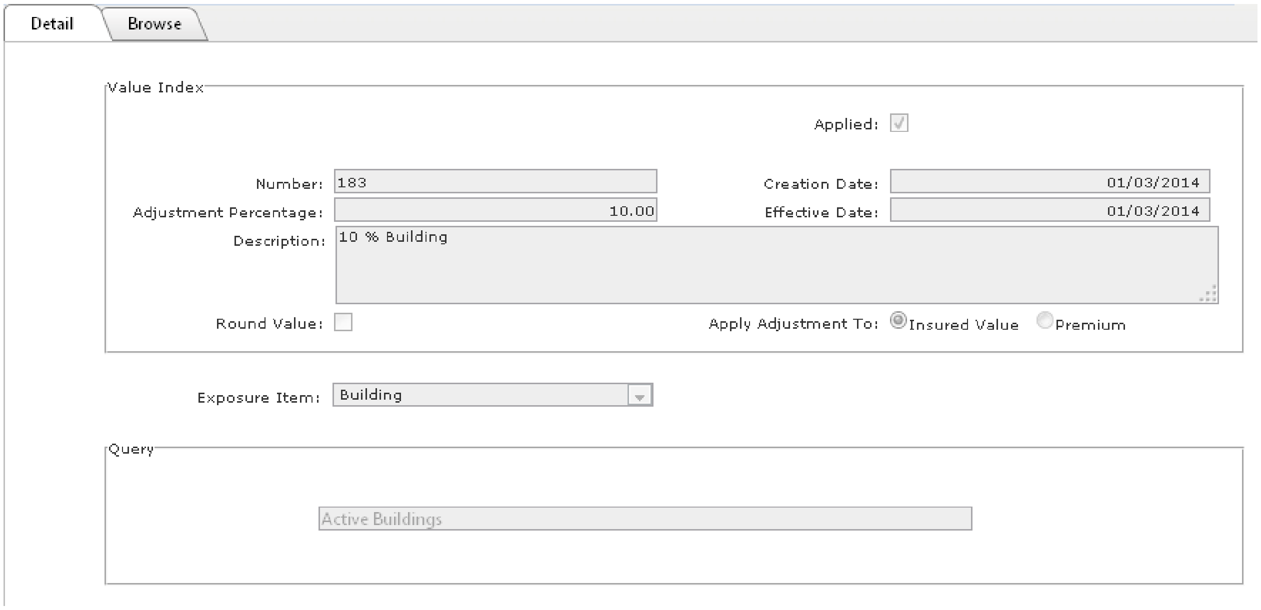
5. Use the dropdown to select *# of FTEs Update* as the Column Map Template.

6. Scroll to the bottom of the window and click *Continue.*

7. Click the *Start Import* button to start the import process.

The system will give you a message telling you what records have been successfully imported. The system will produce an error report for any records that could not be imported letting the user know why. The records can then be fixed and reimported.

VALUE INDEX CONTROL



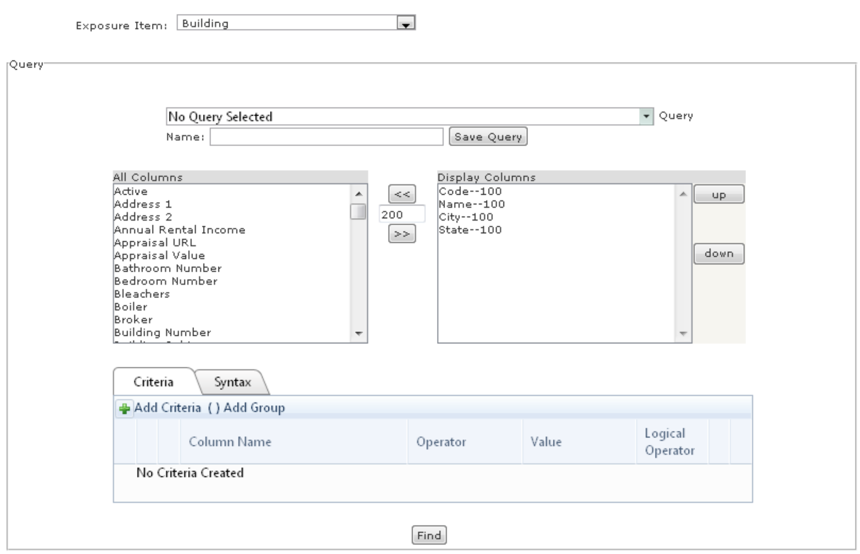
Path: Exposure > Value Index Control

Use the *Value Index Control* window to record the adjustment percentage for different exposure types. Once a record is saved, it cannot be edited.

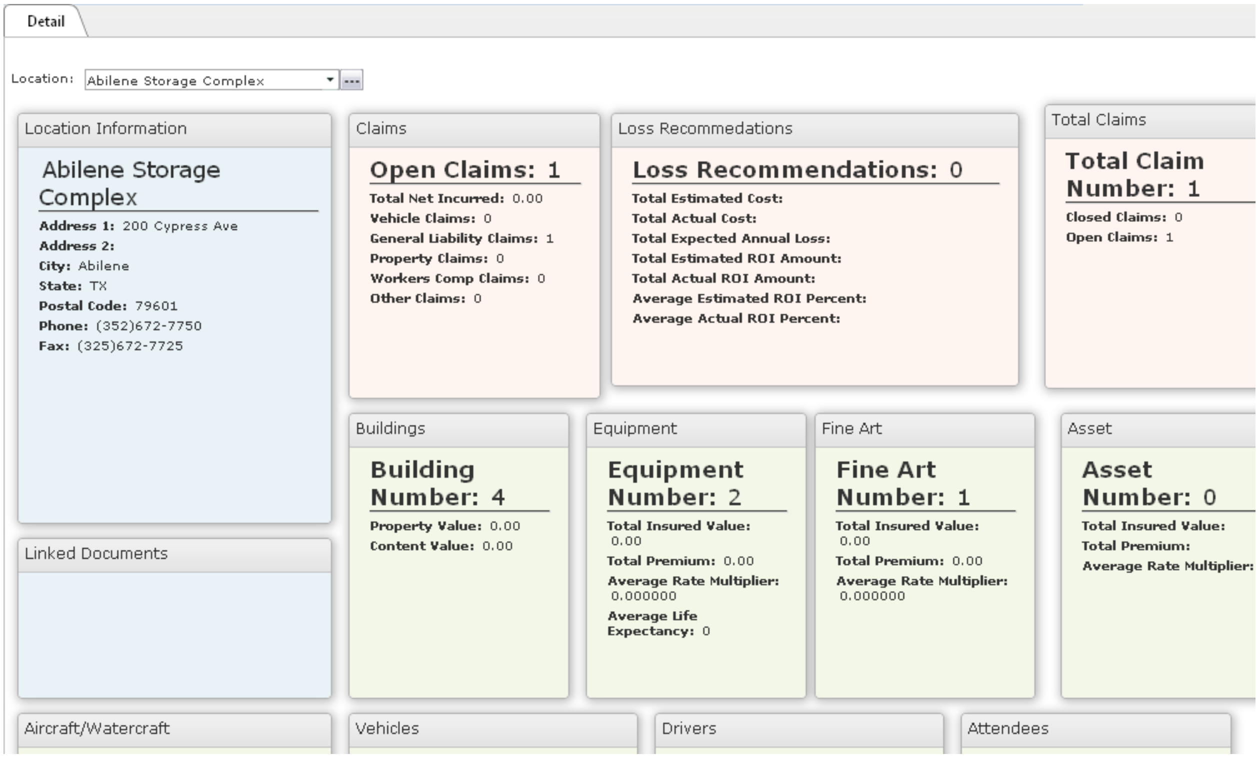
Once saved, updates are applied by the RiskPartner application, and the values of the selected exposures reflect the new value according to the percentage applied.

If the *Round Value* box is checked, the property value is rounded to the nearest dollar when the percentage is applied.

In *Add* mode, the window offers a number of *Query* selections, somewhat like a Find feature, to determine the items to which the adjustment is applied.



LOCATION SUMMARY

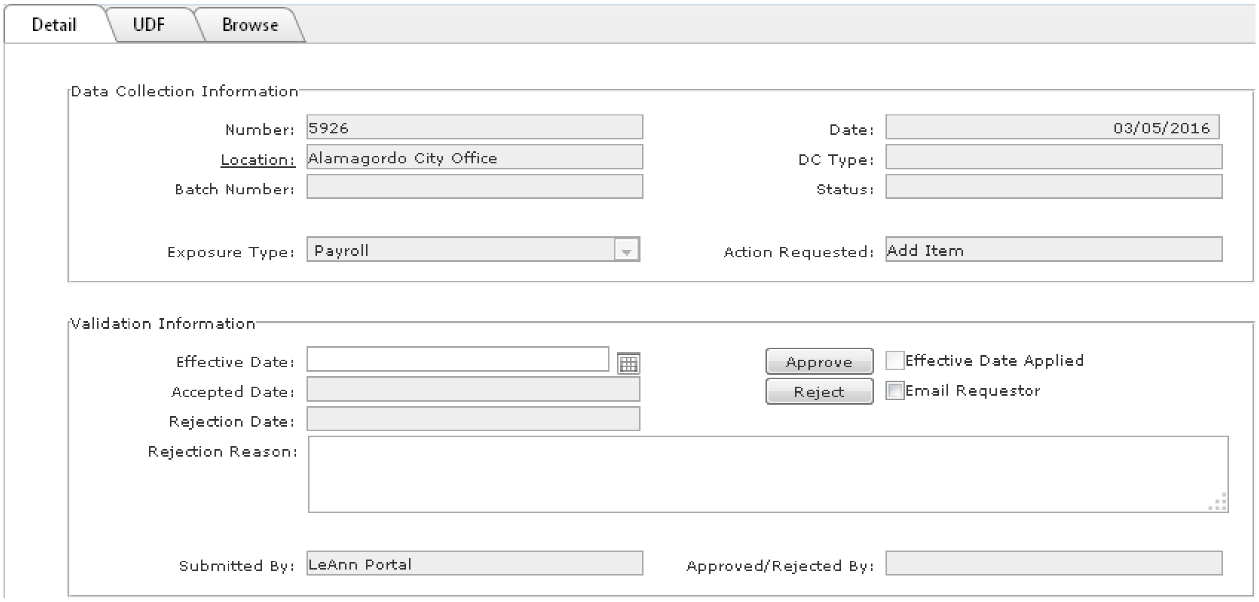


Path: Exposure > Location Summary

Use this window for a quick review of various statistics regarding a selected location. Select a name in the *Location* field, and the information is populated from the data base.

DATA COLLECTION

DATA COLLECTION RECORDS



Path: Exposure > Data Collection> Records / Detail Tab

The primary function of the Data Collection module is to review Exposure items that are added, edited, or deleted from the Portal Data Collection forms. Data collection records should not be added from this window in the RiskPartner application.

RiskPartner automatically creates a Data Collection record when a Portal user adds, edits, or deletes a record from the Portal.

Follow these instructions to validate data collection records.

****WARNING** DATA COLLECTION RECORDS SHOULD NOT BE PROCESSED DURING THE ALLOCATOIN PROCESS. ALL INVOICES SHOULD BE PRINTED BEFORE ACCEPTING DATA COLLECTION RECORDS FOR THE NEXT CYCLE.**

1. Click on the *Data Collection* dashboard from your MyPage.

2. If any data collection records exist double click on the earliest record shown to view the record in the *Exposure > Data Collection > Records > Detail Tab*. This can be done by date or by the selecting the record with the lowest record number.

3. Review the record paying attention to the exposure type, and action requested. Scroll down to review the exposure item detail. If the action requested was an *Edit Item*, you will see any fields added or changed highlighted in red. Mouse over the field to see the previous value.

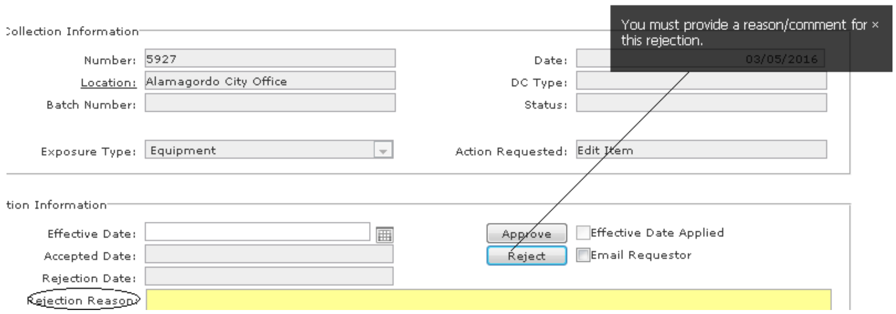
4. If needed the record can be edited before being validated. Follow the instructions below to edit a submitted record before validating.

5. Determine if the change is to be approved or rejected. No Change records have no effect on data. They are simply a reporting tool, and as such can be accepted or rejected and will still perform their reporting function.

6. To approve, simply click on the *Approve* button.

7. To reject, fill out a reject reason, then click on the *Reject* button.

****Warning**** - Once an item has been validate it cannot be undone.



It is important to note that the Archdiocese should not populate an effective date when validating.

All approved changes are reflected in the rest of RiskPartner. For example if a building was added using data collection, a record for this new building does not display with the other Building schedules until this change is approved from the *Data Collection* window. Note the *Approve* and *Reject* buttons disappear after you approve or reject a record. In addition, the *Accepted Date* or *Rejection Date* field is automatically completed when you click the *Approve* or *Reject* button.

Once an item has been submitted from the Portal, you can edit a record that has not been approved or rejected.

To edit submitted data collection records:

1. Click *Edit* on the RiskPartner toolbar.

2. Scroll down to the item information and change the record as needed.

3. Scroll to the bottom of this window.

4. Click the *Save* button at the bottom of the window to save the Item.

5. Click *Save* on the RiskPartner toolbar to save the header information.

6. Click the Approve button.

Data Collection Detail Field Definitions

Data Collection Information Section

Exposure Type – This field indicates the type of exposure that has changes.

Action Requested – This field indicates the type of change that was made by the Portal user, i.e., Add Item, Edit Item, or Delete Item.

Item Information and **Validation Information** Sections

Code/Number – This field shows the code that belongs to the submitted exposure item.

Item Type – For submitted exposure items, this indicates the Type, such as Building Type, Vehicle Type, etc.

Description/Name – Taken from the exposure item record, this is the name of the item.

Accepted Date – The field is automatically completed when you click the Approve button to accept the changes to the exposure item.

Rejection Date – The field is automatically completed when you click the Reject button to accept the changes to the exposure item.

Rejection Reason – If submitted changes are rejected, use this field to explain basis of rejection.

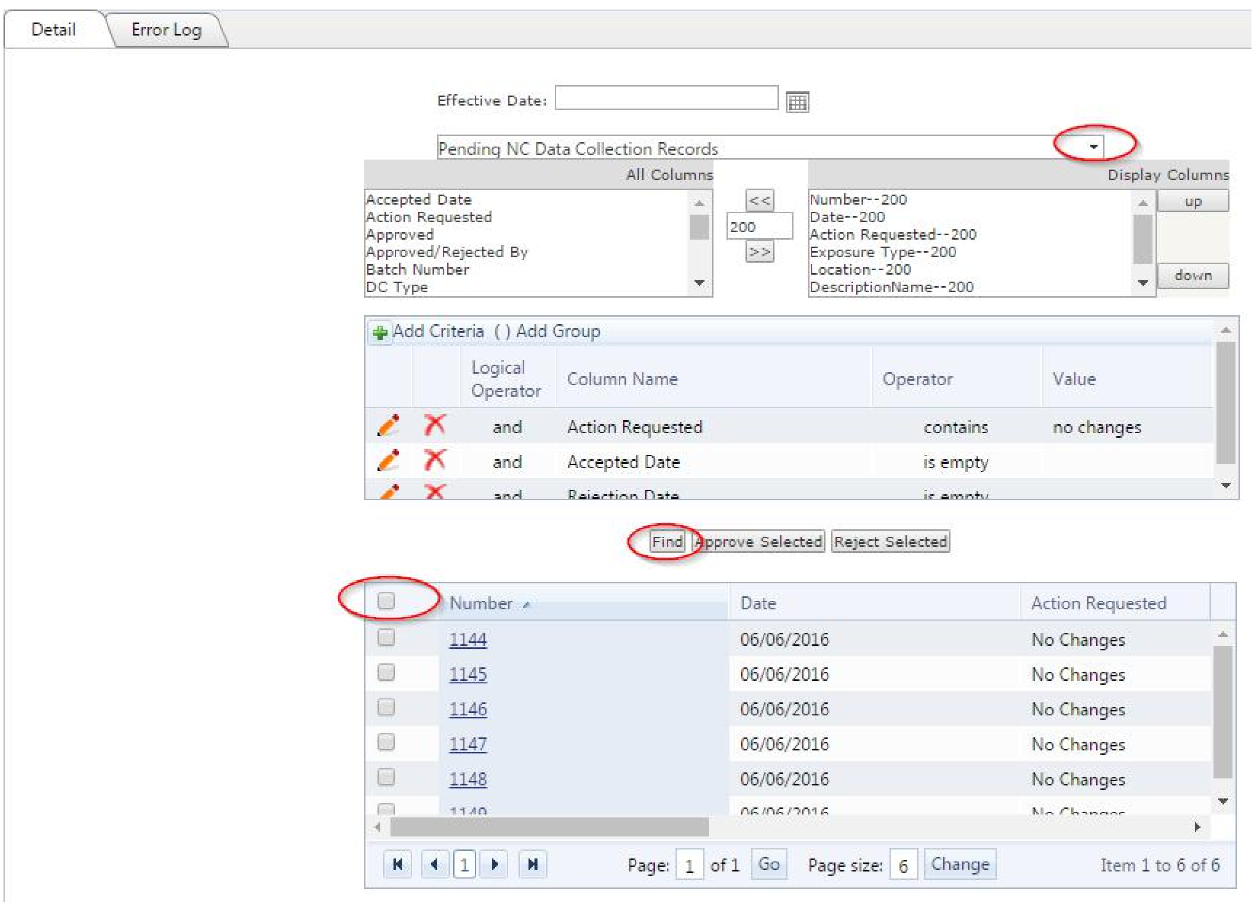
Submitted By – The field shows the name of the person that submitted the changes.

Email Broker – Check this box to send an email message to the broker, which notifies the broker that the change was approved or rejected.

Email Requestor – Check this box to send an email message to the requestor, which notifies the requestor that the change was approved or rejected.

Approved/Rejected By – This field shows the name of the person that approved or rejected the change.

BATCH VALIDATION



Path: Exposure > Data Collection > Batch Validation / Detail Tab

The *Batch Validation / Detail* window is used as a quick way to select a large number of Data Collection submittals and approve or reject them at one time.

The window functions as a search page to query or search for the desired type of data collection records. Queries are created from the *Exposure > Data Collection > Records / Browse* Tab. You can create custom queries such as Pending Records, Approved Records, or a similar query that is needed by your organization.

****IMPORTANT**** - Currently the Batch Validation feature should only be used for No Change Records.

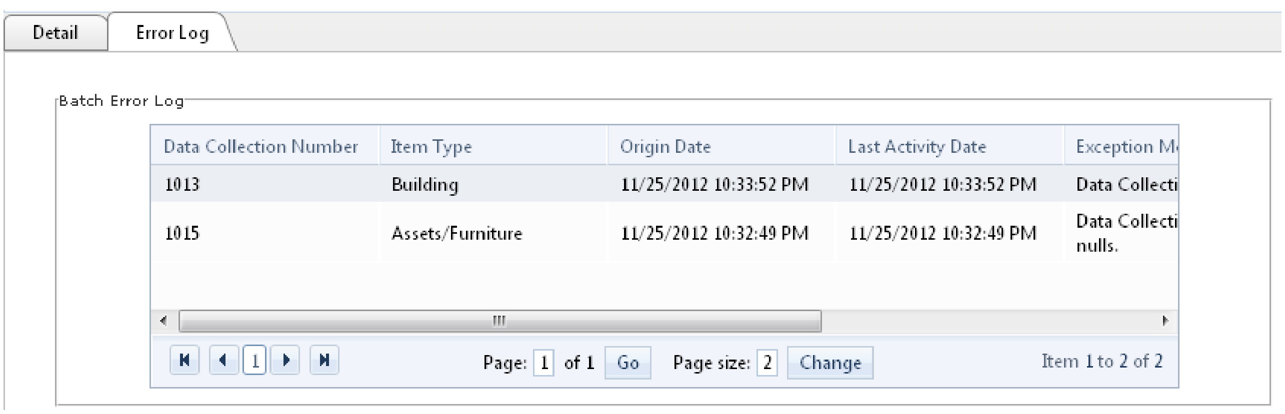
How to Use Batch Validation

To batch approve No Change data collection records:

1. Select the *Pending NC Data Collection Records* query from the query field dropdown.
2. Click the *Find* button.
3. Click the check box in the header to select all. Note you can double-click a line item and a popup window opens with the exposure information for the line item.
4. (Optional) Enter an *Effective Date* for the approvals in the field at the top of the page. This is the same as adding an *Effective Date* on individual Data Collection records as described in the Data Collection topic on page 90.
5. Click the *Approve Selected* button.

RiskPartner returns a message that informs you that the records have been approved. If exceptions are indicated on the message, click the *Error Log* Tab to review them.

Batch Validation Error Log



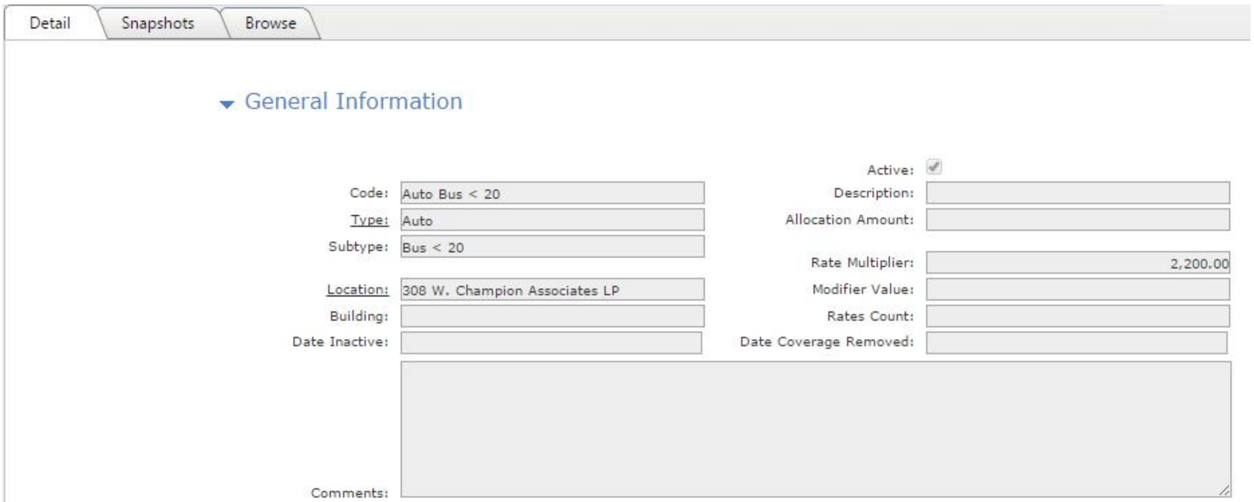
Path: Exposure > Data Collection > Batch Validation / Error Log

This read-only Tab displays a list of any errors encountered when Batch Validation was run.

PREMIUM ALLOCATION

Premium Allocation will be done via RiskPartner Reporting. Rates will be entered into RiskPartner and reports can be run to determine the final adjusted rate values which will be used to calculate the premiums via reports, which we be uploaded back into the system using the RiskPartner Import Wizard.

RATES



Path: Exposure > Personnel > Rates

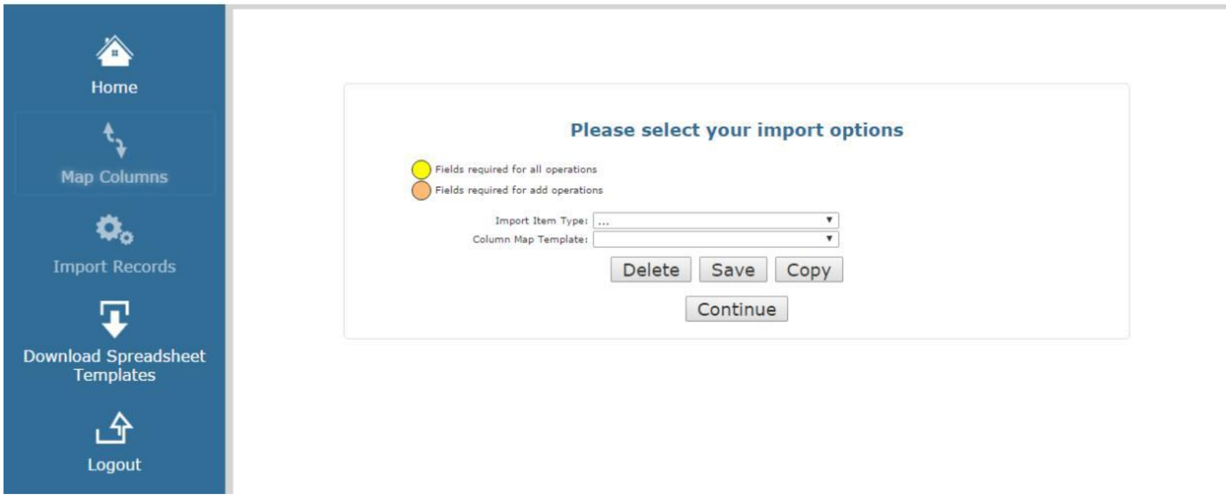
The Archdiocese of Seattle will edit existing rate records to modify rates to be used for premium allocation. As such, rate records should not be created or inactivated by the Archdiocese for reports to function properly. Each time a rate is changed, a snapshot is created for historic purposes.

HOW TO EDIT RATES

Rates can be updated using the RiskPartner Import Wizard or manually edited.

To update rates using the RiskPartner Import Wizard:

1. Navigate to http://login.riskpartner.com/importwizard and login with the same Admin login, password and client you use for the application.
2. Click on the  icon to browse to your rate schedule .xlsx format.
3. Once you have found the file, click the *Submit* button.



4. Use the dropdown to select *Rates* for the Import Item Type.

5. Use the dropdown to select *Rates* as the Column Map Template.

6. Scroll to the bottom of the window and click *Continue.*

7. Click the *Start Import* button to start the import process.

The system will give you a message telling you what records have been successfully imported. The system will produce an error report for any records that could not be imported letting the user know why. The records can then be fixed and reimported.

To manually edit Rate records:

1. Click 

on the Exposure section of the Action Menu or follow the menu path.

2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired rate record.

3. Click *Edit* on the RiskPartner toolbar.

4. The location is not important. Only change the Rate Multiplier and comments fields, leave all other fields as they are.

5. Click *Save* on the RiskPartner toolbar.

6. Repeat process until all rates are updated.

CALCULATING PREMIUMS

Premiums will be calculated in RiskPartner by running a series of reports. The Archdiocese of Seattle uses 3 reports to calculate premiums.

- Building Summary – Calculates premium for each building
- Vehicle Summary – Calculates premium for each vehicle
- Premium Allocation Summary – Calculates premium for each location

Follow these instructions to run the premium reports:

1. Go to the Reports > Export Manager menu.

2. Find the report in the list and single click to highlight.

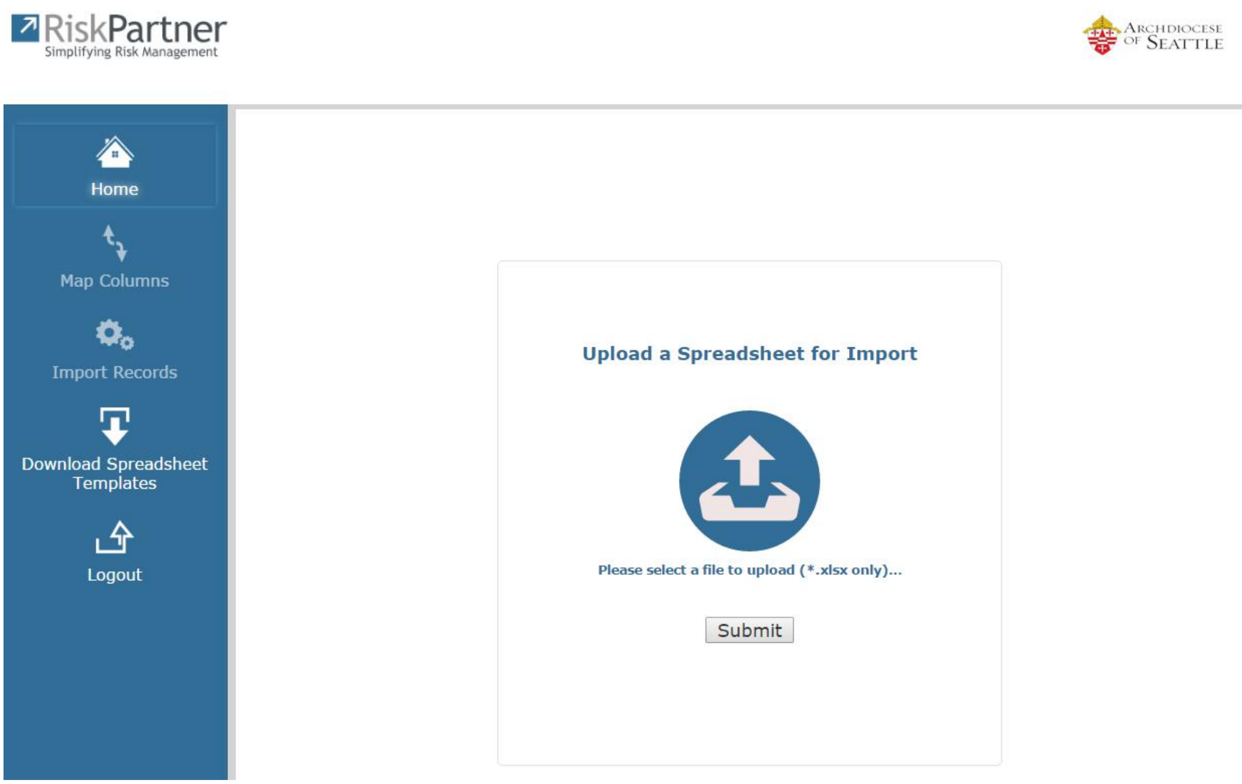
3. Click on the *Download Export* button to run the report.

4. Once the report runs, use the File>Save As feature to save the report to a folder/path where it can be easily accessed for later import. It is important to keep the default save settings so Excel will save it in an *.xlsx format for use with the import tool.

Premium reports can be run, then you can adjust the rates as needed and run the report again. See the section above for how to edit rates. This process can be repeated until the correct rates for the year are confirmed.

Once finalized the Premium Allocation Summary export should be uploaded as a linked document to the global Archdiocese record in File>Organization>Organization>Archdiocese of Seattle.

UPLOAD PREMIUM CALCULATION RESULTS



Path: Login.RiskPartner.com/import wizard

Once the proper rates are confirmed, the result of each Premium report will be uploaded to RiskPartner to store the result of the premium calculations. To perform this function the Archdiocese of Seattle will utilize the RiskPartner Import Wizard.

NOTE: By design, RiskPartner limits the number of records that can be imported to 3,000 at one time.

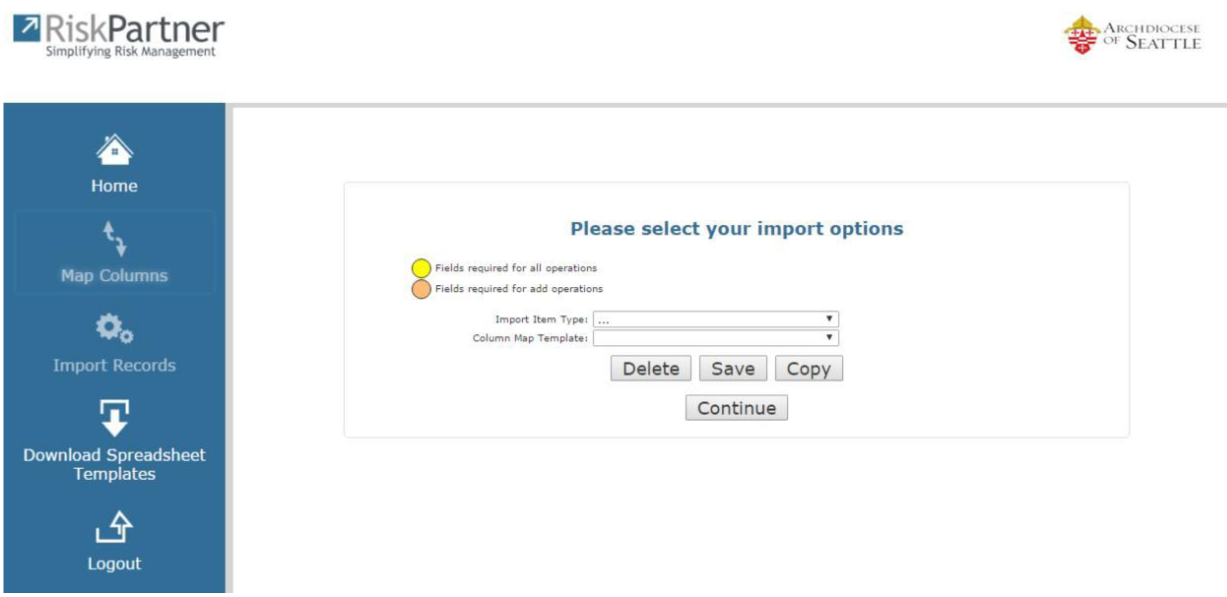
Upload Building Premiums and Prior Year's Insured Value

To upload building premium and prior year's insured values:

5. Navigate to http://login.riskpartner.com/importwizard and login with the same Admin login, password and client you use for the application.

6. Click on the  icon to browse to previously saved Building Summary report in .xlsx format.

7. Once you have found the file, click the *Submit* button.



8. Use the dropdown to select *Building* for the Import Item Type.

9. Use the dropdown to select *Building Premium Update* as the Column Map Template.

10. Scroll to the bottom of the window and click *Continue.*

11. Click the *Start Import* button to start the import process.

The system will give you a message telling you what records have been successfully imported. The system will produce an error report for any records that could not be imported letting the user know why. The records can then be fixed and reimported.

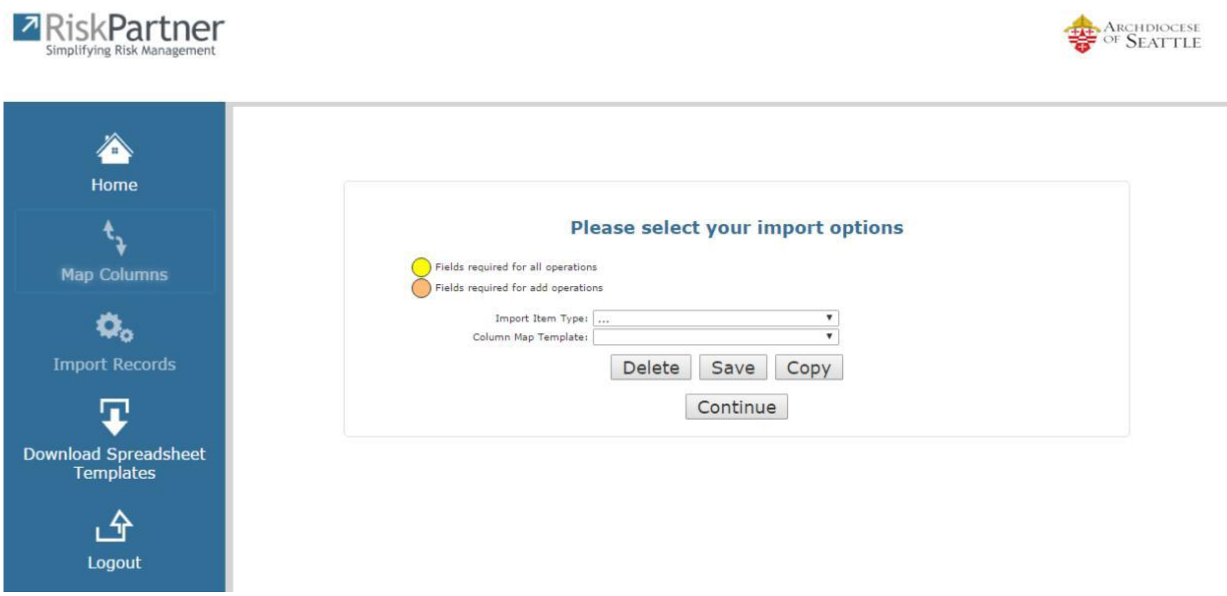
Upload Vehicle Premiums

To upload Vehicle premium values:

1. Navigate to http://login.riskpartner.com/importwizard and login with the same Admin login, password and client you use for the application.

2. Click on the  icon to browse to previously saved Vehicle Summary report in .xlsx format.

3. Once you have found the file, click the *Submit* button.



4. Use the dropdown to select *Vehicle* for the Import Item Type.

5. Use the dropdown to select *Vehicle Premium Update* as the Column Map Template.

6. Scroll to the bottom of the window and click *Continue.*

7. Click the *Start Import* button to start the import process.

RiskPartner imports the records. If any errors are found, they are grouped in a new spreadsheet.

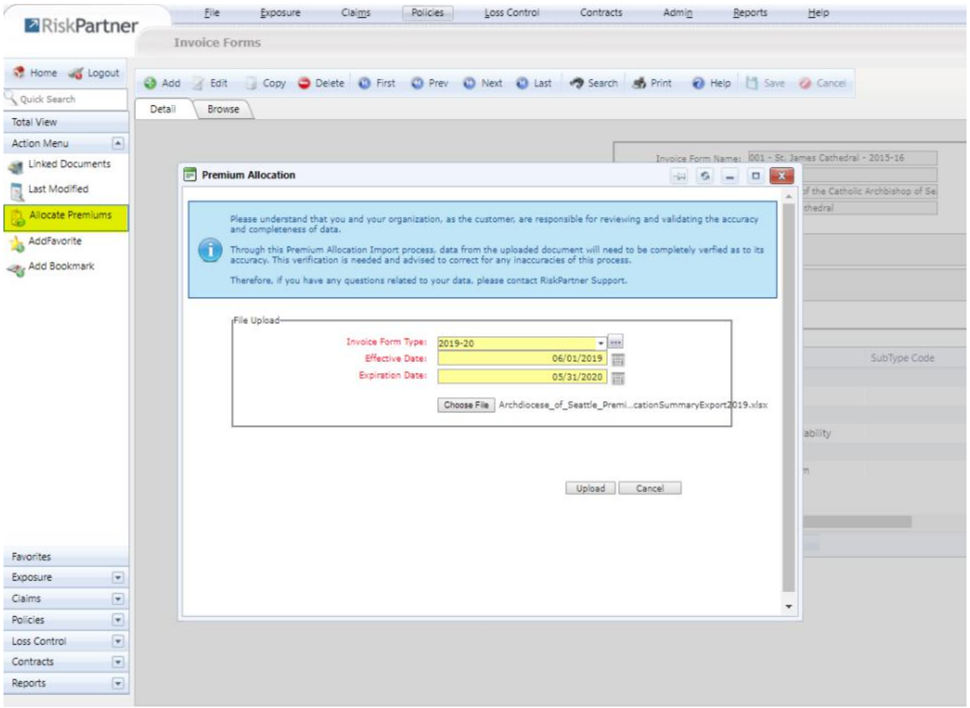
When problems occur with the import, you are alerted and asked to save or view the error file. Download the file, fix any issues (which are detailed in a column added to the end of each row), and upload the file into the Import Wizard following the same process as before.

Upload Premium Summary to Invoices

The Premium Allocation Summary export will be imported into RiskPartner to create an invoice form for each location listed on the export.

To create invoice forms based on the premium summary export:

1. Navigate to the Policies>Invoices>Invoice Forms menu
2. Click on the Allocate Premiums button in the Action menu in the navigation bar to the left

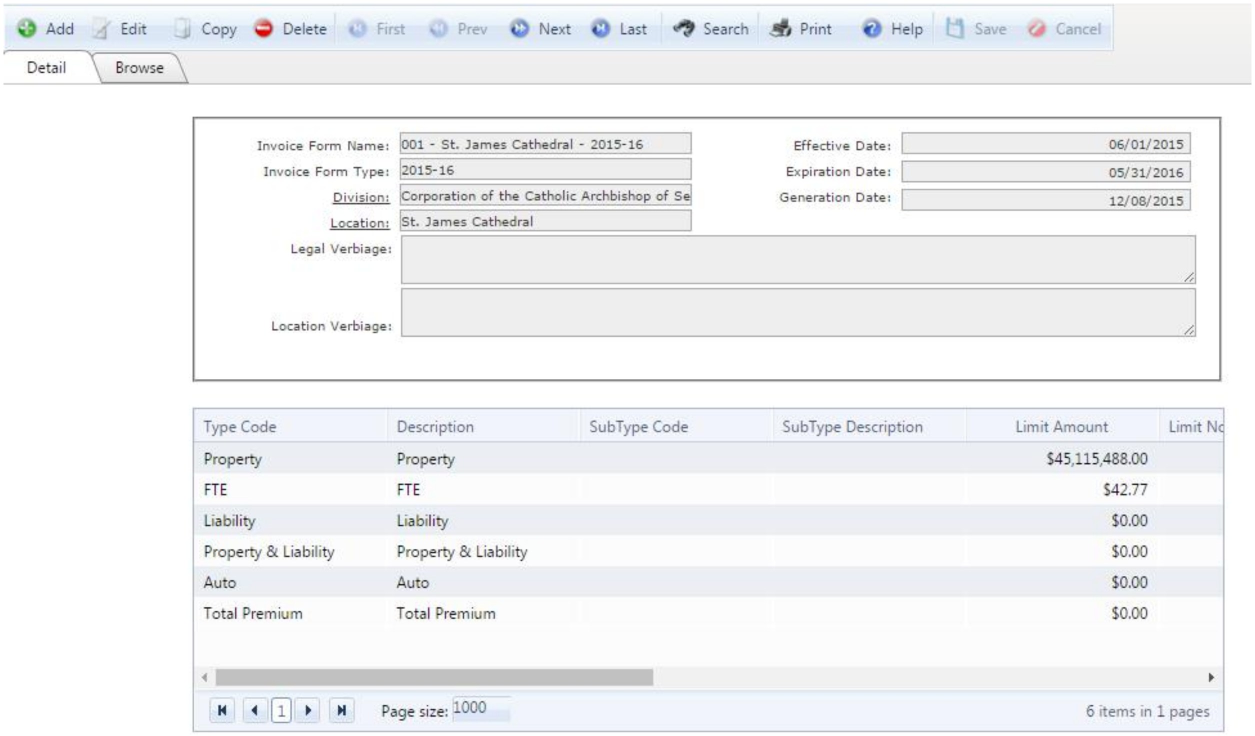


3. Choose the proper year for the Invoice Form Type
4. Enter an effective and expiration date to be associated with each invoice
5. Click the Choose File button to browse to your file system to select the Premium Allocation Summary excel file created in the steps to calculate the premium.
6. Click the upload button.

Upon clicking upload, the system will create an invoice for each location listed on the premium allocation export.

INVOICING

INVOICE FORMS



Path: Policies > Invoices >Invoice Forms

Data to produce Invoices is stored in RiskPartner Invoice Forms and will be imported by RiskPartner utilizing the Premium Summary Export produced during the premium calculation process.

HOW TO EDIT AN INVOICE FORM

It is important to note that all initial invoices should be created via upload from RiskPartner. Changes should NOT be made to existing records. Instead, changes will be made by copying the existing record and making the changes to the newly created copy to preserve a history of changes made to the invoice. The system will automatically make the last record created with a valid date range active and will inactivate all other forms.

1. Click 

on the Policies section of the Action Menu or follow the menu path.

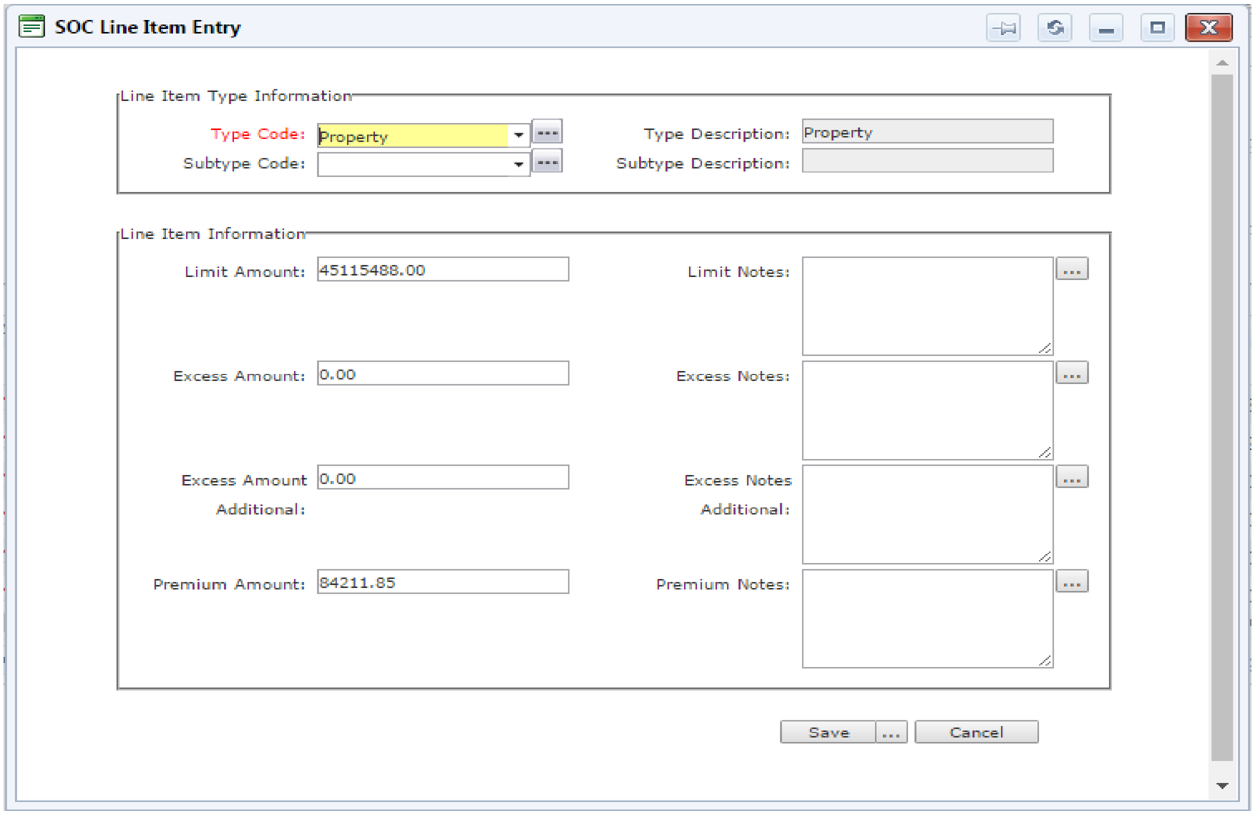
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired invoice record making sure you always edit/copy the latest revision. (Use the "*contains"* operator in your search to find all forms with the same name but with different revisions.)

3. Click *Copy* on the RiskPartner toolbar to create a new record based on the existing record. (DO NOT CLICK EDIT)

4. Add *Rev. X* to the end of the Invoice Form Name where *X* equals the number of times you have revised the form.

5. Re-enter the Effective & Expiration Dates.

6. Click on the pencil icon next to any of the coverages listed.



7. Edit the Premium amount field to change the premium amount for any coverage. To change Property Limits, FTE counts change the limit amount.

8. Click *Save* on the SOC Line Item Entry Window to save the line item.

9. Repeat Steps 6-8 until all changes are made.

10. It is important to note that if you adjust premiums, other than a discount, the Total Premium will need to be manually adjusted to off-set. Follow steps 6-8 and select the Total Premium line item to adjust.

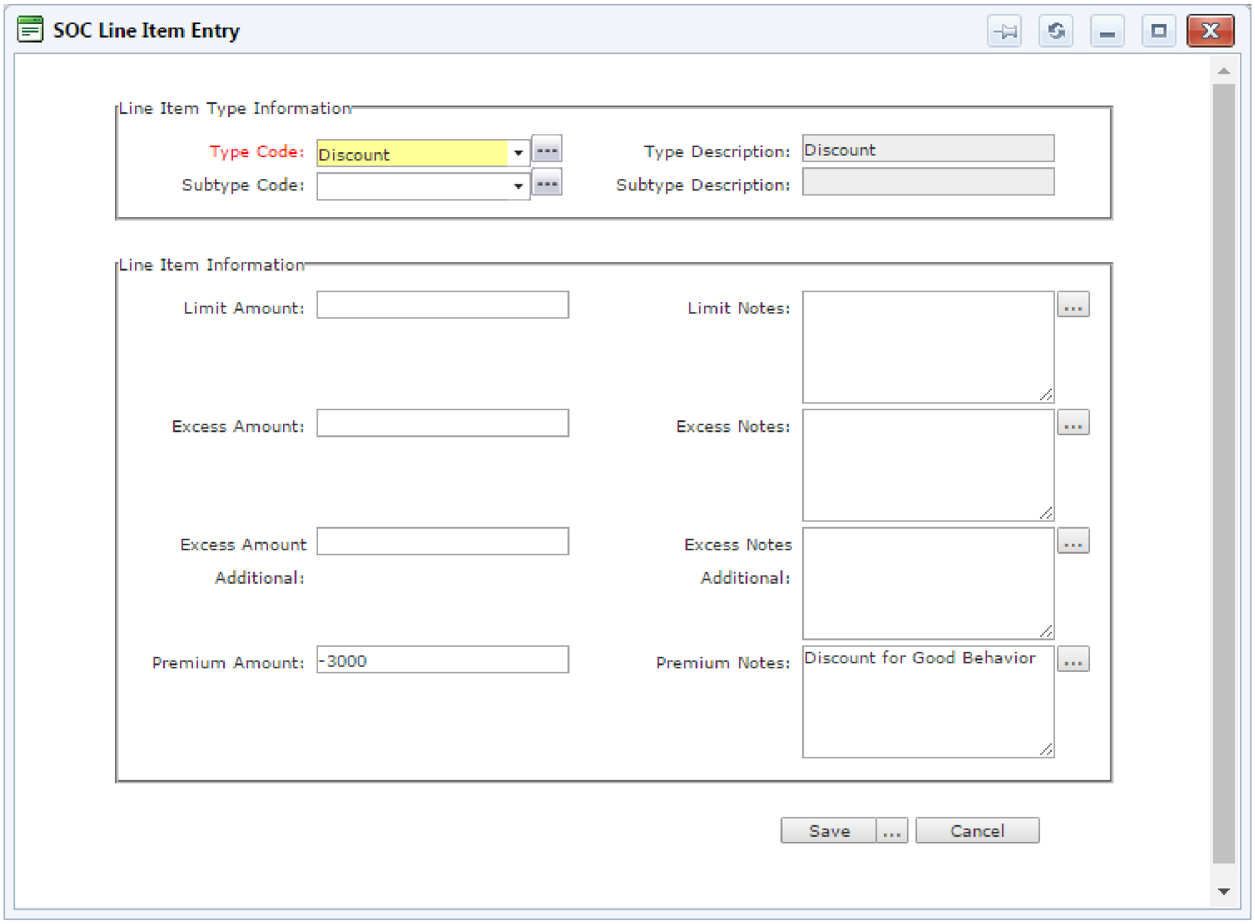
11. Click *Save* on the RiskPartner toolbar.

12. Follow the instructions below regarding printing invoices.

Invoice Discounts

Discounts can be added to invoices by creating a Discount line item on an Invoice Form. Discounts will not be remembered from Year to Year and will need to be re-entered after each import of the Premium Summary.

HOW TO ADD A DISCOUNT TO AN INVOICE FORM

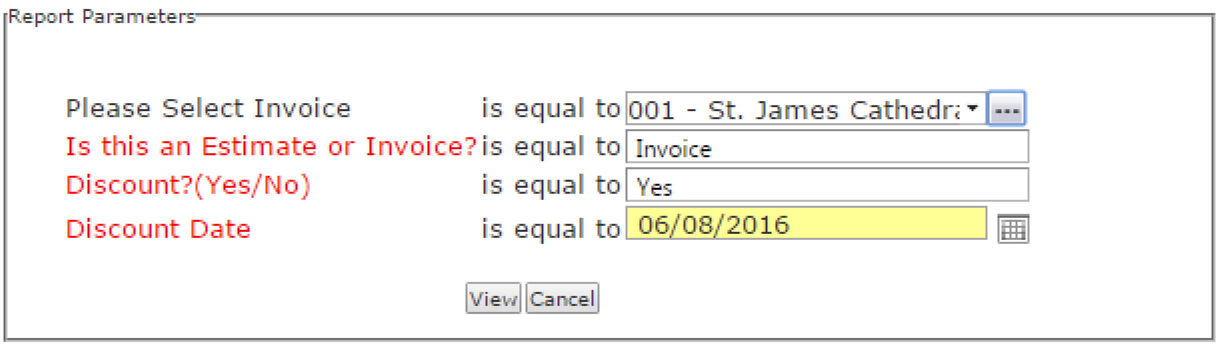


To add a discount to an invoice:

1. Click Invoice Forms on the Policies section of the Action Menu or follow the menu path.
2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired invoice record making sure you always edit/copy the latest revision. (Use the "*contains*" operator in your search to find all forms with the same name but with different revisions.)
3. Click *Copy* on the RiskPartner toolbar to create a new record based on the existing record. (DO NOT CLICK EDIT)
4. Add *Rev. X* to the end of the Invoice Form Name where *X* equals the number of times you have revised the form.
5. Re-enter the Effective & Expiration Dates.
6. Click the *Add Line Item* button.
7. Choose *Discount* as the Type Code.
8. Enter the amount you wish to discount the invoice as a negative number in the Premium Amount field.
9. Enter a description for the discount that will print on the invoice in the Premium Notes field.

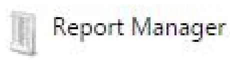
10. Click *Save* on the SOC Line Item Entry window to save the line item.
11. Click *Save* on the RiskPartner toolbar.

Printing Invoices

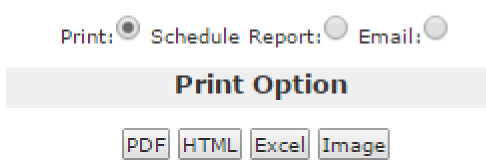


Path: Reports> Report Manager > Policies Section

To run the Invoice Report:

1. Click 

on the Reports section of the Action Menu or follow the menu path.
2. Click to highlight the report labeled *Archdiocese of Seattle Invoice*.
3. Click the *View Report* button at the bottom of the window.
4. Select the proper invoice form. (Make sure you are printing the latest revision.)
5. Type in *Invoice* or *Estimate* to set the report title.
6. Select *Yes* or *No* to determine if you wish to include the standard discount for early payment on the invoice
7. If you selected *Yes* in step 6, enter the discount date.
8. Click *View*



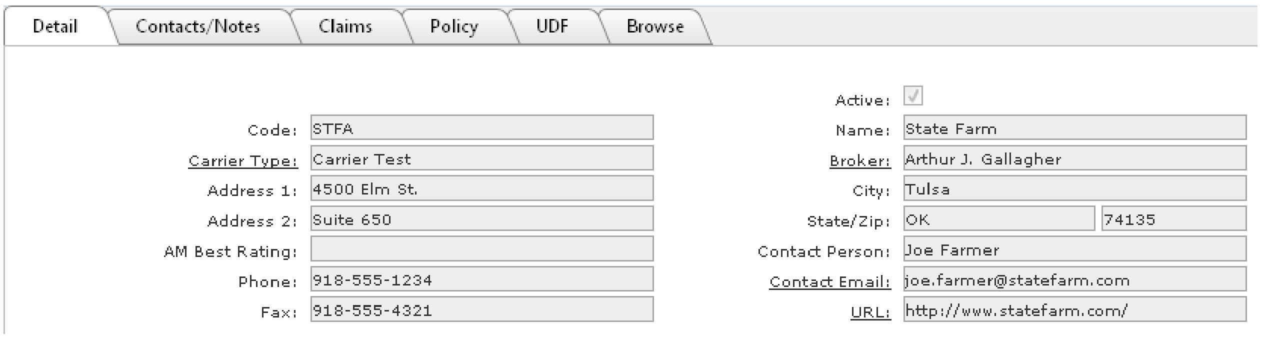
9. Print should be selected by default, click on the *PDF* button to open the report in PDF format.
10. Once in PDF, save the file to your local computer.
11. Upload the file as a linked document to the location record to which the invoice is associated, making sure to select invoice for the linked document category and check the *View in Downloads* check box to make it available for portal users. (See Linked Documents)

POLICIES

POLICIES MODULE

The Policies module includes records related to issued policies, the carriers, and invoices.

CARRIERS



Path: Policies > Carrier

Use the *Carrier* window to record the address and contact information for the carriers issuing the insurance policies.

CARRIER DETAIL FIELD DEFINITIONS

Code – Type a unique code to identify the carrier.

Name – Enter the full carrier name.

Carrier Type – Select the Carrier Type established in *File > Organization > Lookups > Carrier Types*.

Broker – Select the broker used for this carrier.

Address, City, State, Zip – Type the full address for the carrier.

AM Best Rating – Enter the carrier's A. M. Best rating.

Contact Person – Type the name of your contact at the carrier's office.

Phone – Enter the phone number for the carrier.

Contact Email – Type the contact person's e-mail address.

Fax – Enter the fax number for the carrier.

URL – Enter the URL for the carrier's web site.

HOW TO ADD CARRIER RECORDS

To add new Carrier records:

1. Click 

on the Policies section of the Action Menu, or follow the menu path.
2. Click *Add* on the RiskPartner toolbar.

3. Complete all required fields. These are identified by red labels. Note: Some fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.

4. (Optional) Complete elective fields as needed.

5. Click *Save* on the RiskPartner toolbar.

How to Edit Carrier Records

To edit Carrier records:

1. Click 

 on the Policies section of the Action Menu or follow the menu path.

2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.

3. Click *Edit* on the RiskPartner toolbar.

4. Make needed changes to the record. Reminder: All required fields must be completed.

5. Click *Save* on the RiskPartner toolbar.

How to Inactivate Carrier Records

To inactivate Carrier records:

1. Click 

 on the Policies section of the Action Menu or follow the menu path.

2. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.

3. Click *Edit* on the RiskPartner toolbar.

4. Uncheck the Active check box.

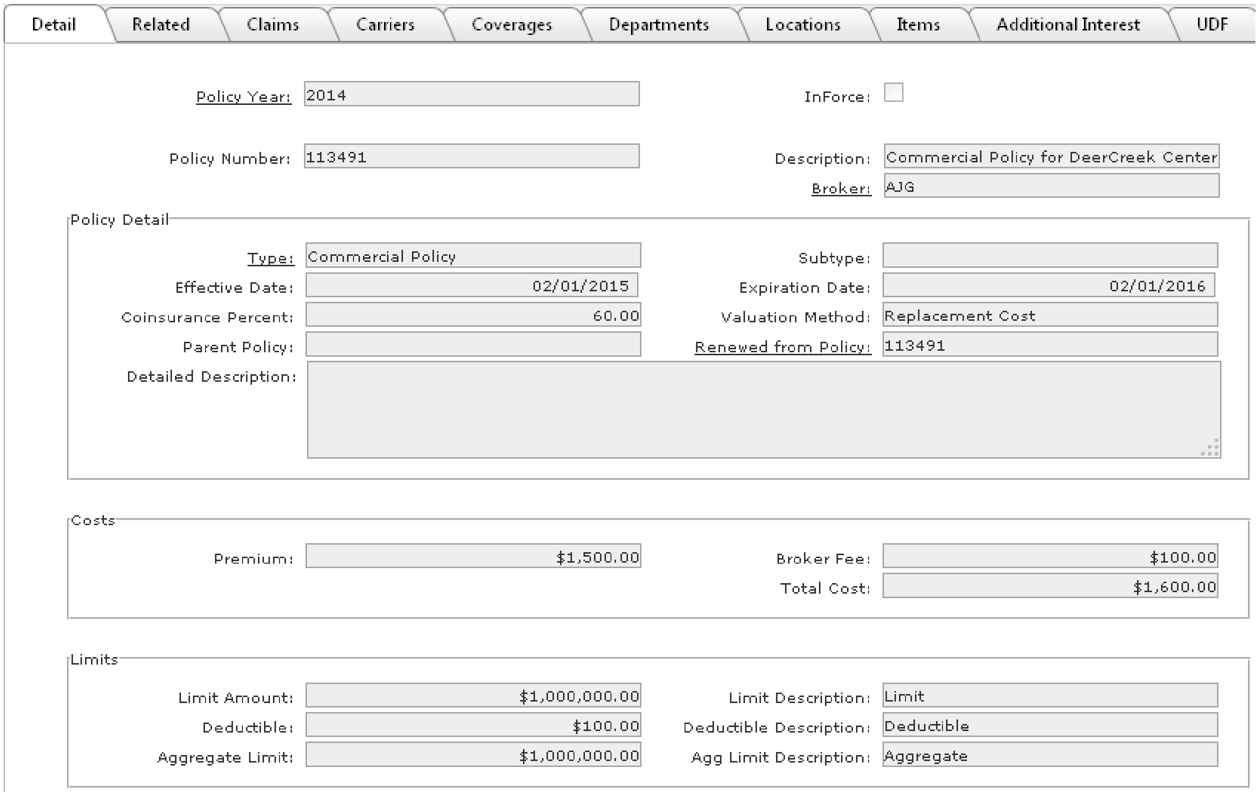
5. Click *Save* on the RiskPartner toolbar.

Carrier Policy Tab

Path: Policies > Carriers / Policy Tab

Use the *Policy* Tab on the Carriers window to add, edit, or delete any policies issued by the carrier.

POLICY DETAIL TAB



Path: Policies > Policy / Detail Tab

Use the *Policy / Detail* Tab to record essential information about your organization's policies — both in force and expired.

The *Detail* Tab shows the policy number and other related information. See the next topic, Policy Detail Field Definitions, for more information.

POLICY DETAIL FIELD DEFINITIONS

Policy Year – Select the appropriate Policy Year for reporting purposes. Policy years are created in *File > Organization > Lookups > Policy Year*.

Policy Number – Type the policy number against which the claim is filed.

InForce – This read-only check box reflects the results of continual system monitoring. Every 10 to15 minutes, a service runs to check the effective and expiration dates of the policy. If the current date falls within the effective date range, the system checks the InForce box. When the current date is not within the effective date range, the system clears the check box.

Department – Select the department associated with this coverage.

Description – Type a short description of the policy.

Broker – Select the broker for this policy in the Broker field.

Policy Detail Section

Type – Select the policy type from the list created in *File > Organization > Lookups > Policy Types*.

Effective Date – Enter the policy's effective date.

Coinsurance Percent – If you use more than one carrier and the carriers share coverage, type the percentage of coinsurance for this policy.

Parent Policy – If this policy is subordinate to another policy, select the parent policy number here.

Subtype – Select the policy subtype from the list created in *File > Organization > Lookups > Policy Types*.

Expiration Date – Enter the expiration date of the policy.

Valuation Method – Type the method used to evaluate the loss.

Renewed from Policy –This field is automatically completed when you use the Action Menu *Renew Policy* link. The new policy displays in the window, and the system enters the policy number from the previous year.

Detailed Description – Type any additional details about the policy in this field.

Costs Section

Premium – Type the amount of the premium.

Broker Fee – Enter the amount of the broker's fee.

Total Cost – This read-only field displays the full cost calculation after you enter the premium and broker fee.

Limits Section

Limit Amount – Enter the coverage limit amount.

Deductible – Enter the amount of the policy deductible.

Aggregate Limit – Type the collective amount of limits.

Limit Description – Enter a description of the Limit.

Deductible Description – Describe the deductible.

Agg Limit Description – Describe the aggregated limit.

How to Add Policy Records

To add new Policy records:

1. Click 

on the Exposure section of the Action Menu, or follow the menu path.
2. Click *Add* on the RiskPartner toolbar.
3. Complete all required fields. These are identified by red labels. Note: Some fields may show the field is disabled (gray background). In these cases, the system completes the field when you save the record.
4. (Optional) Complete elective fields as needed. It is important to note that the user will not be able to check or uncheck the Inforce checkbox

as this is system set and will be updated every 15 minutes based on the effective date range.

5. Click on the carrier tab and [associate carriers to the policy](#).

6. Click *Save* on the RiskPartner toolbar.

How to Edit Policy Records

To edit Policy records:

7. Click 

on the Exposure section of the Action Menu or follow the menu path.

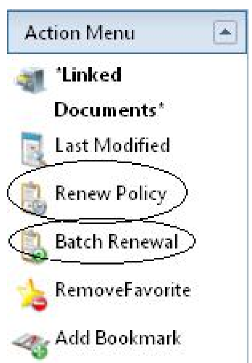
8. Use *Search* on the RiskPartner toolbar, or click the *Browse* Tab to find the desired record.

9. Click *Edit* on the RiskPartner toolbar.

10. Make needed changes to the record. Reminder: All required fields must be completed.

11. Click *Save* on the RiskPartner toolbar.

How to Renew Policies



You have two ways to change the date when policies are renewed for the same policy numbers.

For a single policy:

1. Go to the Policy record to be renewed.

2. Click the *Renew Policy* link on the Action Menu. This places the record in *Edit* mode.

3. Select the new *Policy Year*.

4. Change the *Effective* & *Expiration Dates*.

5. Change any other policy information needed, such as Number, Limits and Descriptions.

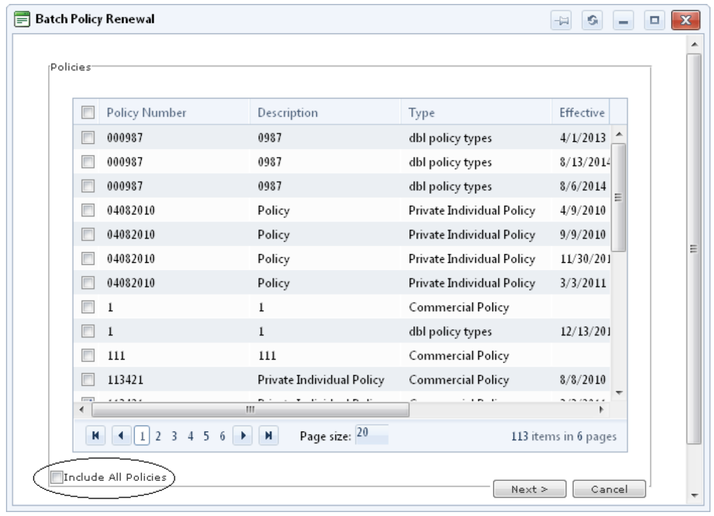
6. Save the record.

For multiple policies that have the same Renewal and Expiration dates:

1. Go to the Policy window (*Policies* > *Policy*).

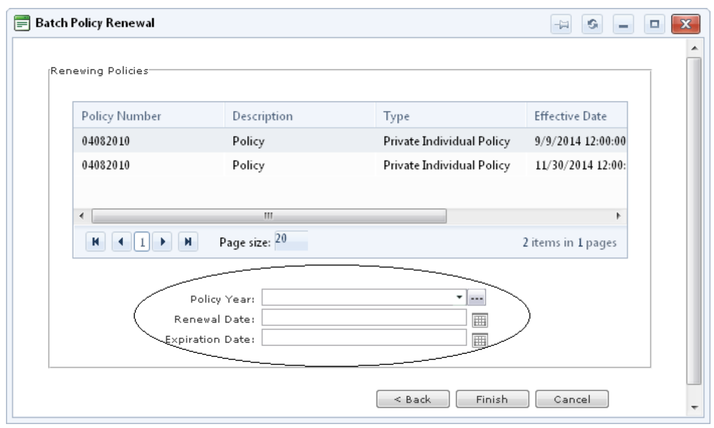
2. Click the *Batch Renewal* link on the Action menu. This opens the *Batch Policy Renewal* popup window that shows expired policies.

3. (Optional) Click the *Include all Policies* check box to see policies in force.



4. Mark the policies that apply.

5. Click the *Next* > button at the lower right of the window.



6. Select the Policy Year, Renewal Date, and Expiration Date.

7. Click the *Finish* button.

8. Click *OK* on the verification message.

Reminder: This only changes the renewal and expiration dates for all policies selected. If other fields on the record should be changed, go to each policy record and make the changes in *Edit* mode.

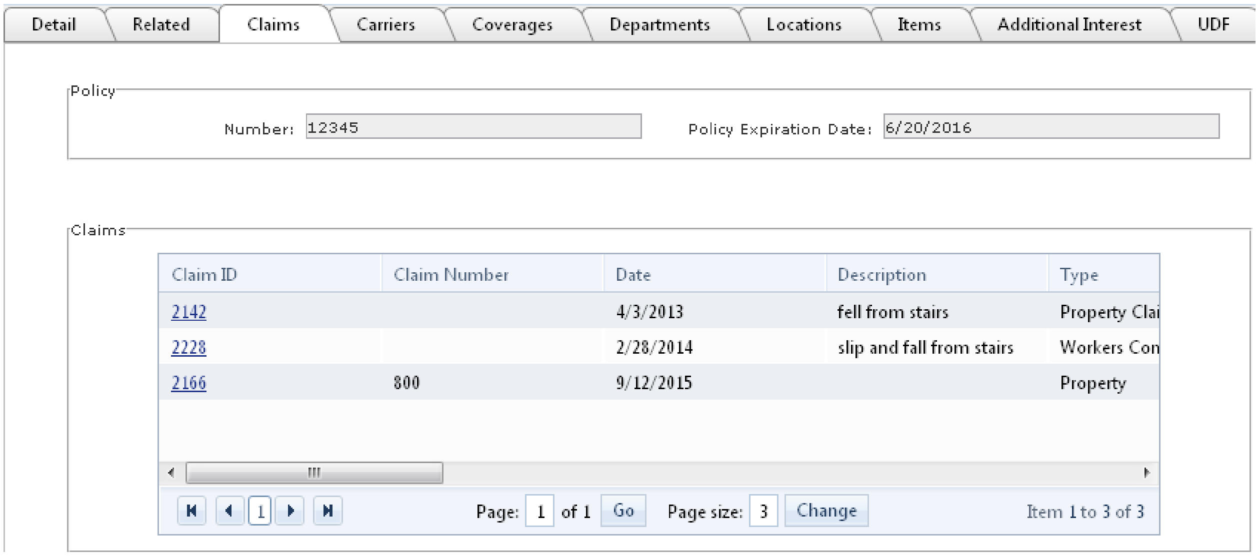
Policy Related Tab

Path: Policies > Policy / Related Tab

The view-only *Related* Tab displays a tree list of policies related to the primary policy.

Click the plus sign to expand the tree.

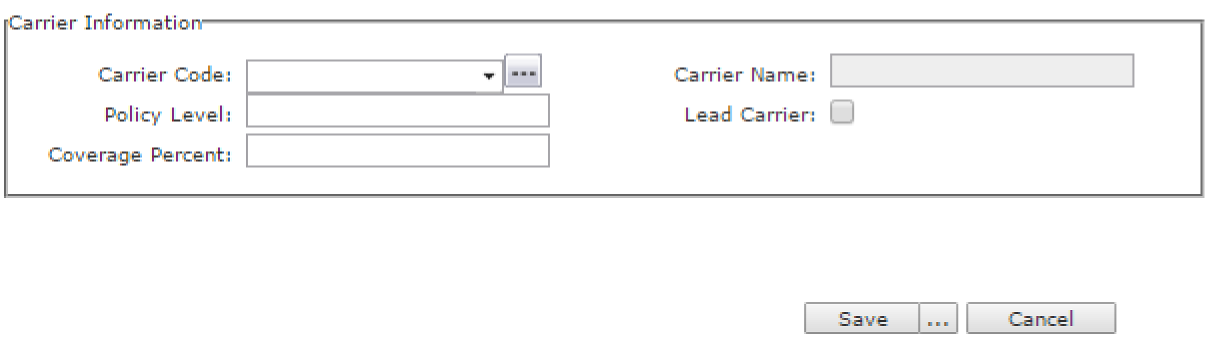
Policy Claims Tab



Path: Policies > Policy / Claims Tab

The *Claims* Tab is a read-only window that shows all claims made that apply to this policy.

Policy Carriers Tab



Path: Policies > Policy / Carriers Tab

The *Carriers* Tab displays the name of the carrier on this policy. Add or delete line items from this window as needed.

The *Policy Level* and *Percentage of Coverage* allow up to two whole numbers to indicate the percentage of coverage for each carrier listed. Note that the total Percentage entered must equal 100% for each level. Each level can have as many carriers as needed.

For each level, one carrier must be indicated as the lead carrier by marking the *Lead Carrier* check box.

To associate Carriers with a policy:

1. Be in Edit or Add mode on the policy to which you want to associate the carrier.
2. Click the *Add Carrier* button.
3. Select a carrier from the list.

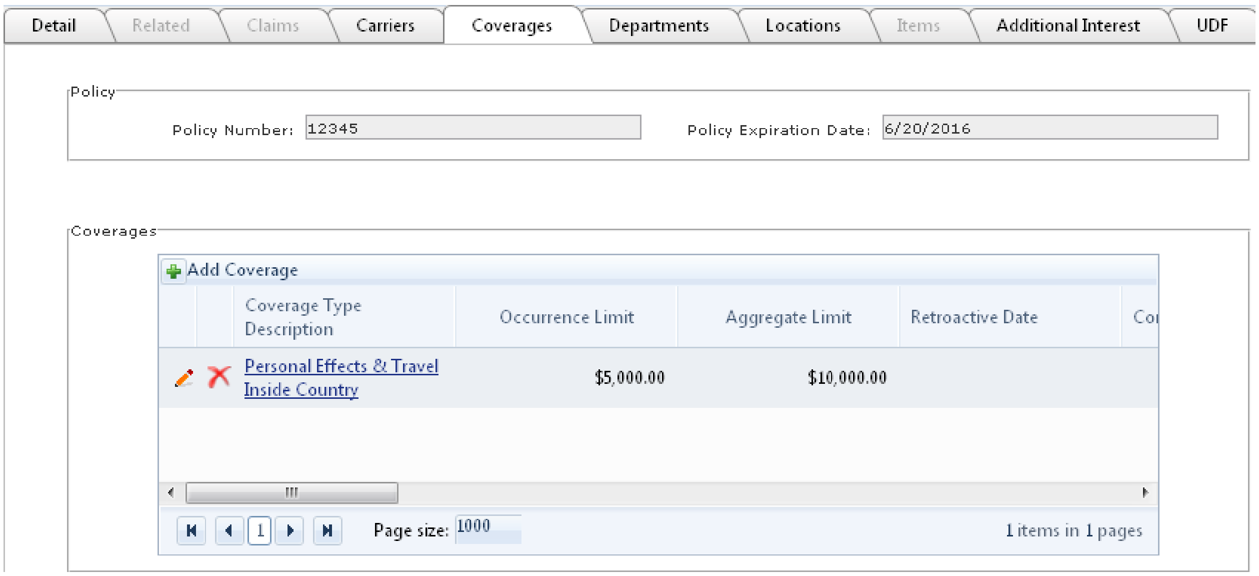
4. If adding multiple carriers to a policy you may wish to set policy levels, coverage percentages, and you may wish to select a carrier to be the Lead Carrier for each level.

5. Click *Save* to add the carrier to the policy.

6. If adding multiple carriers, repeat steps 2-5 until all carriers are associated with the policy.

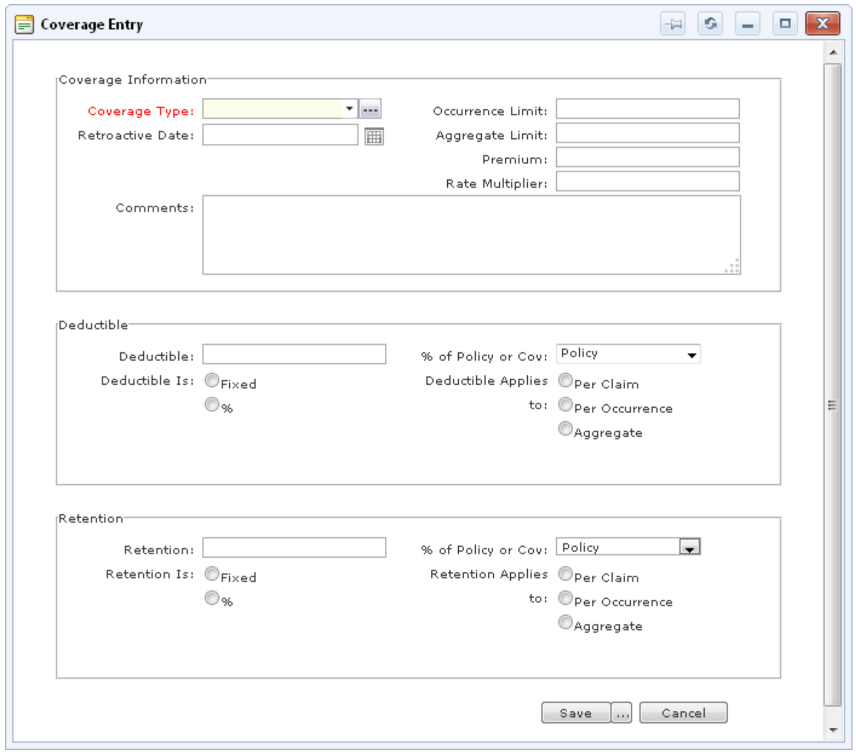
7. Click *Save* to save the policy.

Policy Coverages Tab



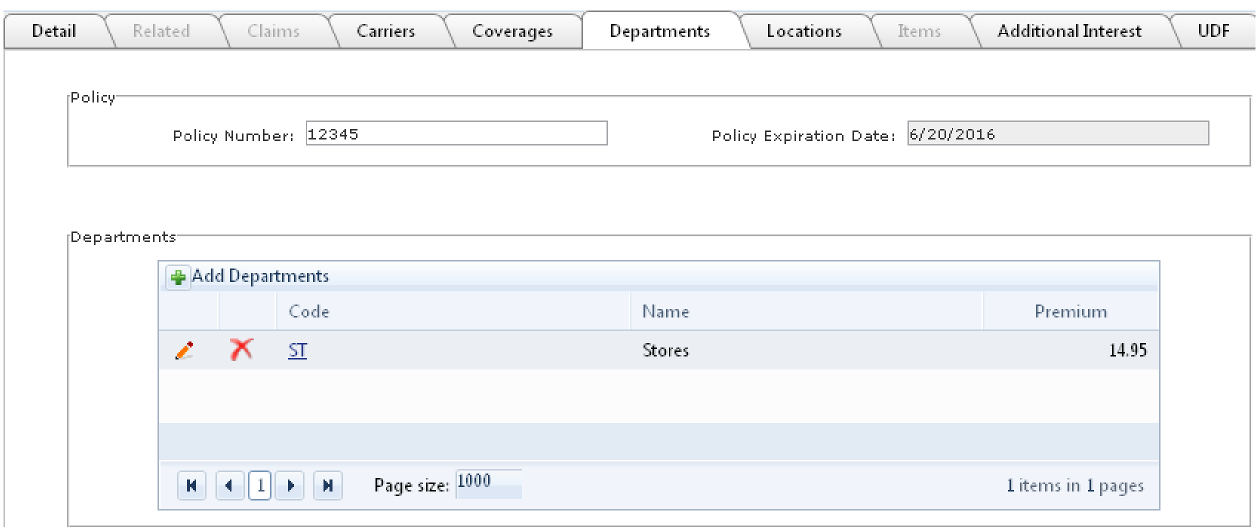
Path: Policies > Policy / Coverages Tab

Use the *Policy Coverages* Tab to add, edit, or delete coverages that are applicable to the policy.



The *Coverage Entry* popup window allows you to set Deductible and Retention specifications.

Policy Departments Tab

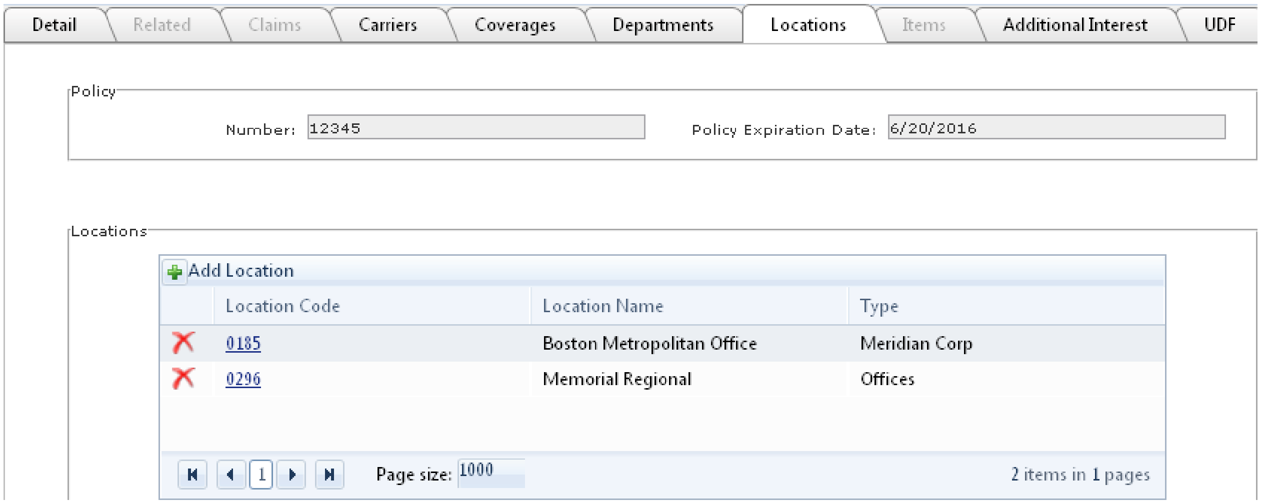


Path: Policies > Policy / Departments Tab

Since several departments can be covered by a policy, you can add as many as needed to this Tab.

In *Add* or *Edit* mode, click the *Add Departments* link and select the departments that apply. If any of the selected department records have a Premium included, that information also displays on this Tab.

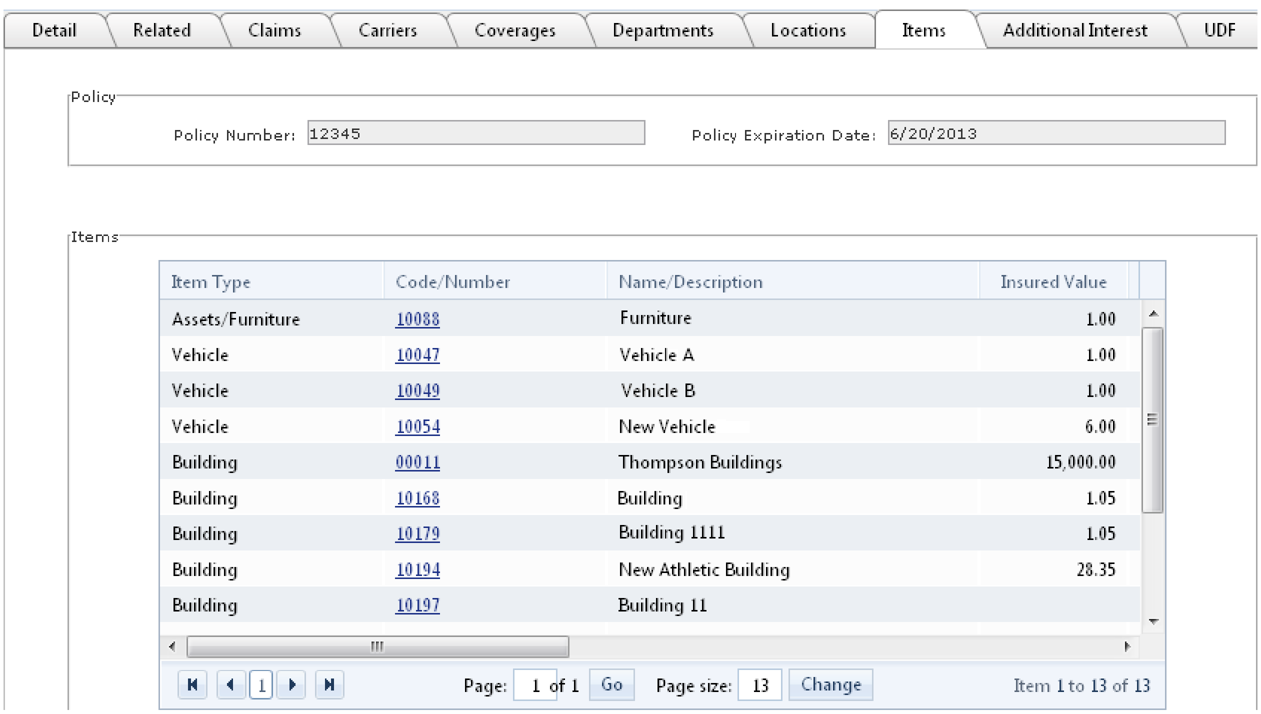
Policy Locations Tab



Path: Policies > Policy / Locations Tab

Use the *Locations* Tab to add any locations that are covered by the policy.

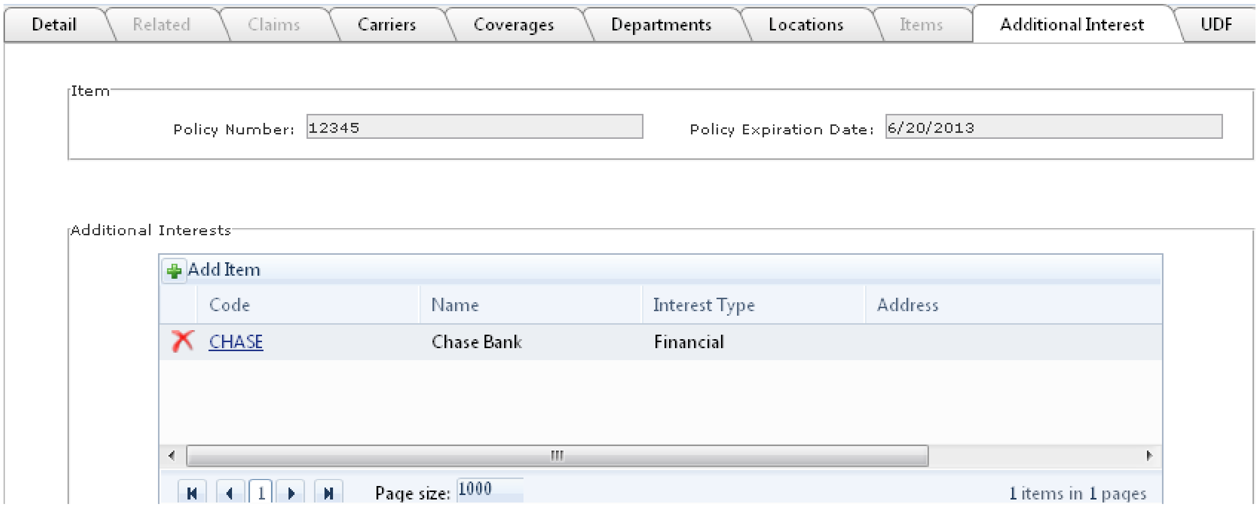
Policy Items Tab



Path: Policies > Policy / Items Tab

The read-only *Items* Tab displays any other persons or entities that are covered by the policy. When you add the policy number to the item window, the item is displayed on the *Items* Tab of the policy record.

Policy Additional Interest Tab



Path: Policies > Policy / Additional Interest Tab

Use the *Additional Interest* Tab to add any additional interest related to the policy.

REPORTS

REPORTS OVERVIEW

The Report Manager consists of numerous pre-designed reports. Summaries like these are an important benefit of using RiskPartner software.

Use these pre-designed reports to review different elements of the data stored in the RiskPartner database. The *Batch Reporting* window is used to schedule reports and have them generate automatically.

If the information that you want is not displayed in the standard reports, you can set up a customized report using the separate Report Writer module.

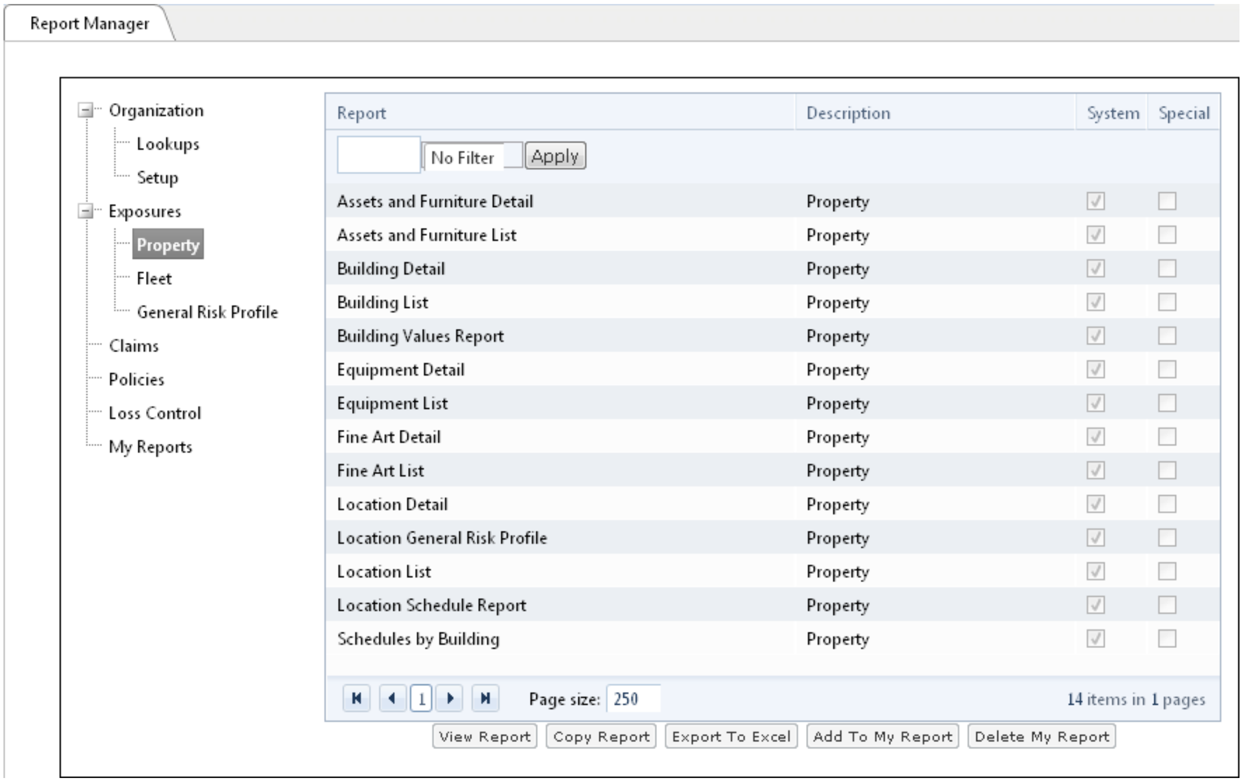
Reports Restricted to Logged-In User's Access

The reports available for view from the Report Manager are limited to the window access of the logged-in user (the active user).

Any report that is tied to a window is also filtered by the privileges granted from *Admin > User Management > Records / Window Access*. If the user cannot view the window, he or she cannot see reports linked to the window.

This is a security setting to assure that non-qualified personnel do not have access to information regarding the controlled windows.

REPORT MANAGER WINDOW



Path: Reports > Report Manager

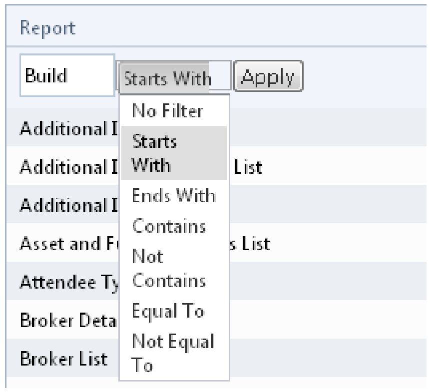
Reports are divided into general sections and filtered by the category listed in the Category tree. In the tree pane, click the plus sign adjacent to the section name to see the list of all categories in the broader section.

Click the category of interest to view and select the related reports. This action displays the reports in the selected category and its child categories. A check mark in the Special column indicates that the report it cannot be copied or modified.

Use the filter fields at the top of the grid to reduce the visible list of reports. See the next topic, Filter Reports by Name, for details.

Some reports, such as Building Detail, are intended to provide information about a single record. If you select a 'Detail' report, RiskPartner requires additional parameters such as the code or name before the report can be generated.

FILTER REPORTS BY NAME



When you open the *Report Manager* window, RiskPartner lists all the available reports. You can filter the list of titles from this view using filtering selections of:

- Starts With
- Ends With
- Contains
- Not Contains
- Equal To
- Not Equal To

If you know the general category of the report such as Organization, Exposures, and Claims, you can select a category in the tree list on the left to reduce the size of the list.

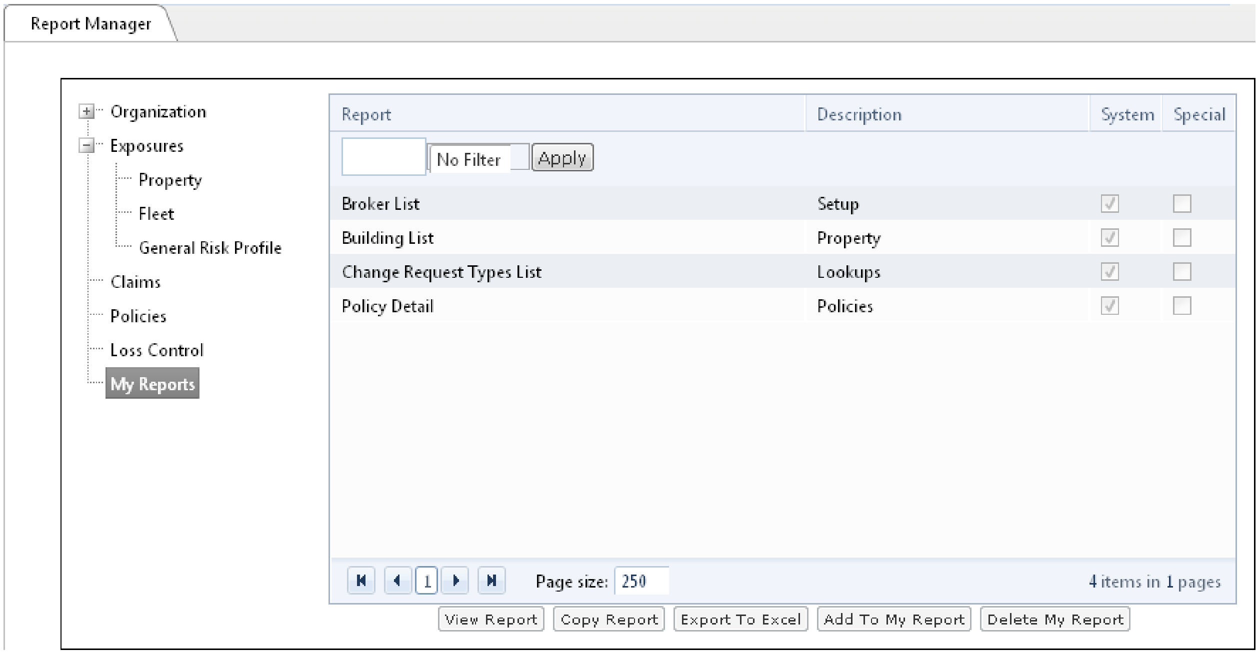
1. Type the character or character string in the first field.
2. Select one of the filtering criteria.
3. Click the *Apply* 

 button.

The list displays any report titles that meet your requirements.

To see the full list of all reports, select *No Filter*.

My Reports Section



Path: Reports > Report Manager / My Reports

The My Reports section is used to store a copy of the reports you use regularly. A report that appears in this section does not alter the original report. The section is simply a way to assemble frequently used reports for easy access.

HOW TO ADD MY REPORTS

To add a report to the My Reports section of Report Manager:

1. Select a report you use frequently.
2. Click the *Add To My Report* button.
3. Click *My Reports* in the left pane

The report you added now displays in the list.

HOW TO DELETE MY REPORTS

To remove a report from the My Reports section of Report Manager:

1. Go to the My Reports section.
2. Select the report you want to remove.
3. Click the *Delete My Report* button.

The report is still in the original section, the line item is merely removed from this section.

VIEW AND PRINT REPORT

RiskPartner looks for records based on selected criteria. The criteria selections depend on the report you choose. For example, the Carrier Detail report displays a separate page with the Report Parameters fields that require both the Code and the Name of the carrier you want to view.

1. Highlight the report line item.

2. Click the *View Report* button. A criteria page may open. The criteria options change depending on the report selected.

3. Complete the parameters or criteria.

The report displays as a .pdf file. Click the print icon on the .pdf toolbar to print the report.

You also have the option to send the data to an Excel spreadsheet. To do this:

4. Select a report.

5. Click the *Export To Excel* button.

COPY REPORT

You can copy a standard report to the Report Writer and amend it to meet your needs using *Reports > Report Writer*.

Select the report you want to copy, and click the *Copy Report* button. This opens the *Report Writer* window with information from the selected report. Use the Report Writer to change aspects of the report to meet your needs.

SCHEDULE REPORTS

Path: Reports > Report Manager (or Report Writer) – View Report Button

Management usually wants regular reports about certain aspects of the business. RiskPartner gives you a way to generate selected reports automatically.

When you select a report and click the *View Report* button at the bottom of the *Report Manager* window, the *Print Option* window opens. If you want to generate the selected report on a regular basis, click the *Schedule Report* radio button.

The generation criteria fields display when you click the radio button. Use these fields to set:

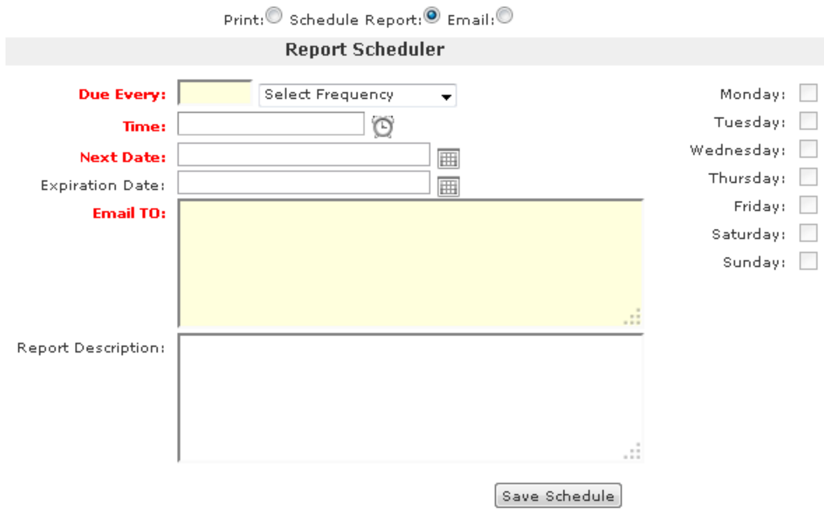
- frequency report is generated
- time of day report is generated
- next generation date
- expiration date
- address of the person or persons who will receive the report

The selections apply to the date, time, and frequency you want to generate the report.

Note that the days of the week apply **only** if you choose Week as a frequency. This allows you to generate the report on specific days. Mark at least one day to generate a report. When you choose Day in the *Due Every* field, RiskPartner automatically generates the report daily as if all days of the week were checked.

See How to Modify Scheduled Reports on page 120 for instructions on changing the generation criteria or deleting a schedule.

How to Set Up Scheduled Reports



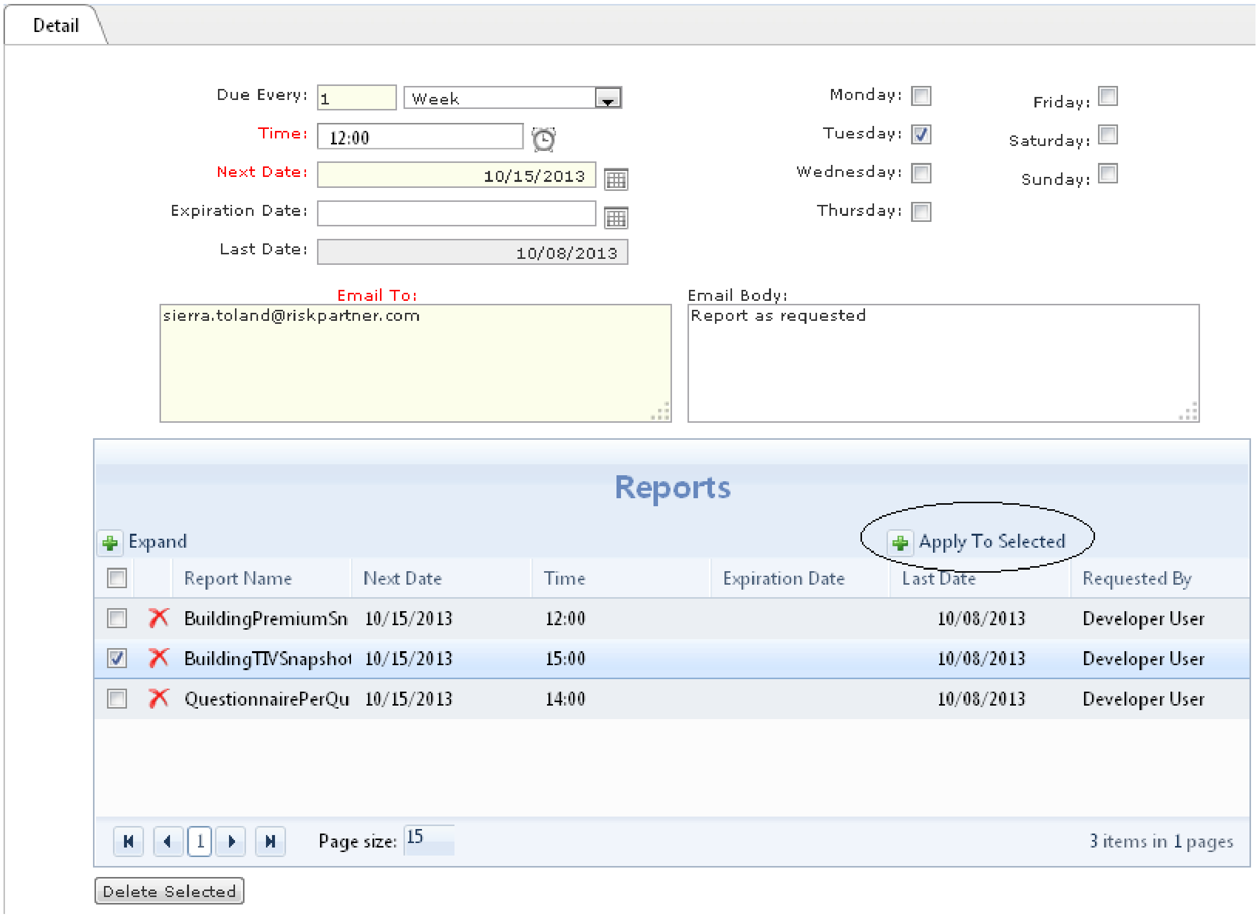
Path: Reports > Report Manager (or Report Writer) - View Report Button

The selections apply to the date, time, and frequency you want to generate the report.

1. Highlight the report to be scheduled.
2. Click the *View Report* button at the bottom of the window.
3. Enter information in the required fields. See the note below regarding weekly reports.
4. Click the *Save Schedule* button.

Note If you select Week in the *Due Every* field, be sure to mark at least one check box for a day of the week. More than one day can be checked, but a minimum of one is required to generate a report. The check boxes apply only when you select Week in the *Due Every* field.

REVIEW SCHEDULED REPORTS



Path: Reports > Report Scheduler

Review, modify, or delete previously established report schedules from the *Report Scheduler* window.

HOW TO MODIFY SCHEDULED REPORTS

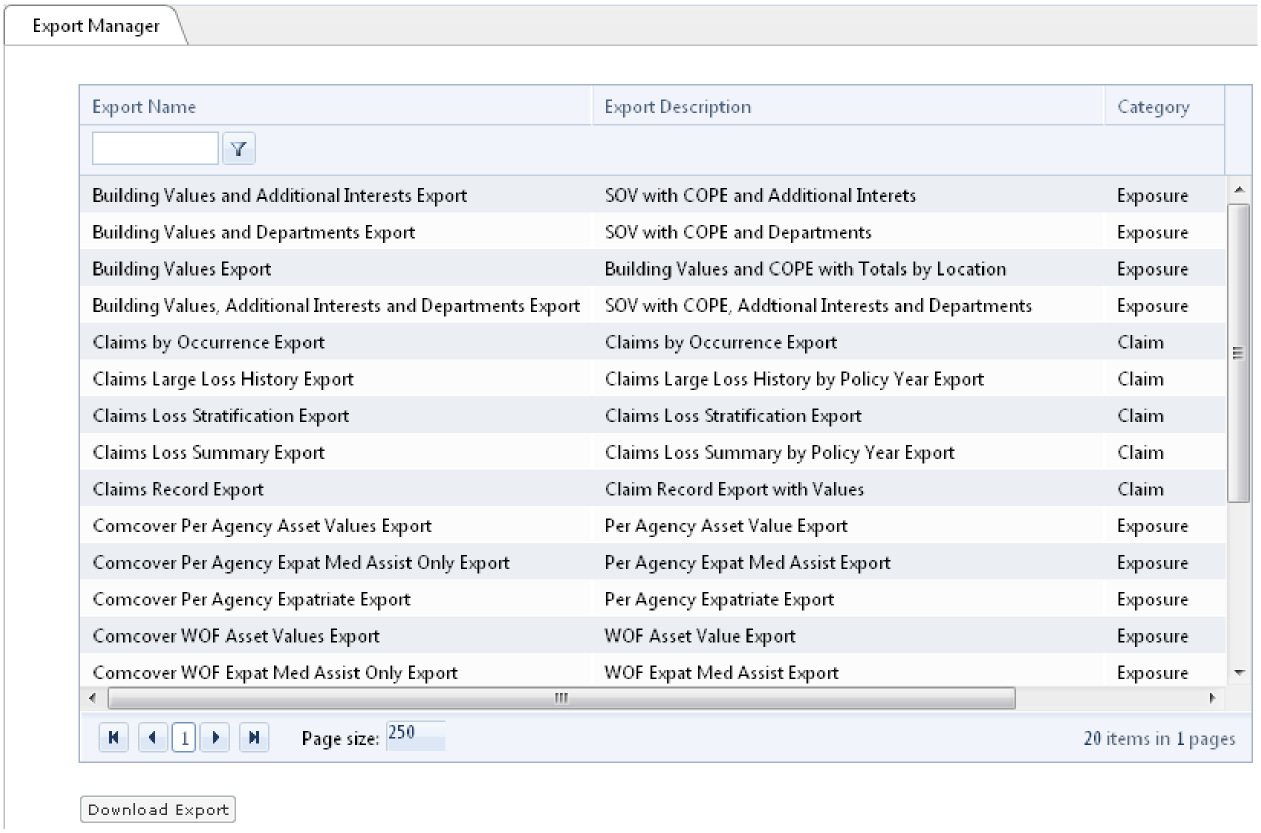
If you need to revise or delete a schedule:

1. Go to *Reports > Report Scheduler*.
2. Click *Edit* on the RiskPartner toolbar.
3. Click the *Modify* link at the top of the grid.
4. Select the report you want to change. Note: You can double-click to populate the fields above the grid. Be certain the check box is marked.
5. Make the changes.
6. Click the *Apply to Selected* link above the grid.
7. Click *Save* on the RiskPartner toolbar.

The *Expand* link toggles between the full modify window and the list of reports.

To delete a line, click the standard RiskPartner delete icon for a line, or check the boxes of several lines and click the *Delete Selected* button to remove more than one line at a time.

EXPORT MANAGER



Path: Reports > Export Manager

Similar to using the *Export* button on a *Browse* Tab to export data to an Excel spreadsheet, you can select any of the titles listed on the *Export Manager* window to view and manipulate the format of information in a spreadsheet.

Depending on the type of information contained in the data, you may be asked to refine the data included in the spreadsheet. For example, if the line selected concerns Claims, an *Export Parameters* popup window opens so you can select the desired Claim Type.

You have the option to view the data immediately (open with Microsoft Excel) or save to a file.

REPORT WRITER

You can create a new report using the *Report Writer*. The module is set up to guide you through the process in the sequence of the Tabs at the top of the window.

The Report Writer uses Microsoft SQL Server Reporting Services (SSRS) to generate the reports. While you can use SSRS for either SQL 2005 or SQL 2008, reports created with the 2008 version cannot be read by the 2005 version. If you are using both SQL 2005 and SQL 2008 in your environment, you may prefer to create all your reports with SSRS for SQL 2005.

Reports are presented in a Table format similar to a spreadsheet and in a Detail format which allows you to arrange the data in different configurations. Determine the format that best suits your needs, because a change from one format to the other erases all setup information. This occurs each time you switch from Table to Detail style.

Before you use the *Report Writer*, plan your report. Determine the information you want to see and then sketch out the columns and totals that you need. The plan can be revised as you develop the report, but an outline is helpful to stay on track.

SUB-REPORTS

You may want information in a report that is not available in the report form you selected. To solve this, use another of your reports as a sub-report to incorporate the information.

Two conditions apply to the use of sub-reports.

8. The reports must be related by a common field containing unique data.

9. All fields from the sub-report are included in the new report.

Sub-reports and the linked field are selected on the *Layout* Tab when you create your new report.

If you use sub-reports, only the data displays in your report. RiskPartner ignores the sub-report's title, logo, margins, etc.

REPORT WRITER REQUIREMENTS

The RiskPartner Report Writer uses the Microsoft SQL Server Reporting Services (SSRS) segment of SQL Server 2005 or SQL Server 2008. If you are using both SQL 2005 and SQL 2008 in your environment, you may prefer to create all your reports with SSRS for SQL 2005 to assure that all reports can be read.

The RiskPartner administrator configures SSRS from *Admin > SSRS Setup* to establish folders, passwords, and other options.

COPY EXISTING REPORTS

You can use any existing report in the *Report Manager* window as the basis for other reports. When you select a report and click the *Copy Report* button from *Report Manager* window, RiskPartner automatically opens the *Report Writer / Properties* Tab ready for your input.

A *Copy Report* button is also on the *Report Writer* window. The list of reports on this window includes reports from the Report Manager and your custom reports. You can copy any reports from the *Report Writer* window using the *Copy Report* button.

Click the *Quick View* button to print the report without displaying the Print Format popup window. The following conditions are required to use the *Quick View* button:

- A Default Report Format has been selected
- Reports with multi-currency must have a default currency selected
- Reports with multi-currency can have one rate only

HOW TO COPY REPORTS

10. Go to *Reports > Report Writer* or *Reports > Report Manager*.

11. Highlight a report you want to copy.

12. Click the *Copy Report* button. The existing report opens in the *Report Writer* window.

13. Give the report a new name.

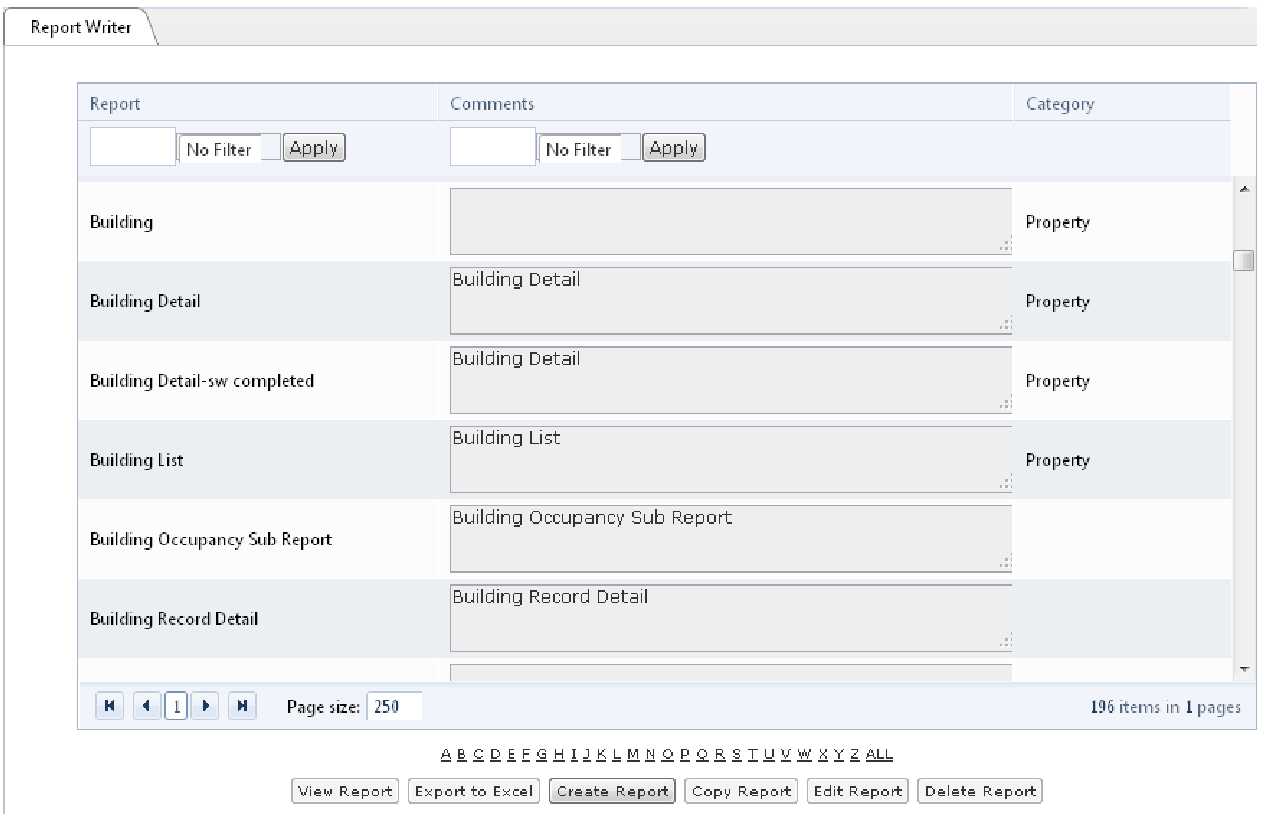
14. Make changes to the contents using any of the *Report Writer* Tabs you desire.

15. Save the report from the *Layout* Tab.

Your report design is not saved until you click the *Save* button on the *Layout* Tab. If you design complex criteria and calculations, go to the *Layout* Tab regularly to save your work.

CAUTION: Before you copy a report, review the other topics in this document and study the behavior of *Report Writer* features. It isn't necessary to use the options on every Tab of the *Report Writer* window, but an understanding of how each works is essential to create a report. The *Layout* section is especially important.

REPORT WRITER LIST



Path: Reports > Report Writer

When you open the *Report Writer* window, RiskPartner displays a list and description of all reports created with the module. You can filter the list by a character string in the Report name or in the Comments. Type the characters and select a criterion.

You can also click the Alpha character links below the grid to view all reports that start with that letter.

Buttons at the bottom of this window are more numerous than those on the *Report Manager* window.

When you click *Edit Report* on this window, you can also save the edited report with a different name. This is accomplished from the *Layout* Tab. Use the *Save As* button in Layout and assign a different name from the source report to use the feature.

CREATE REPORTS

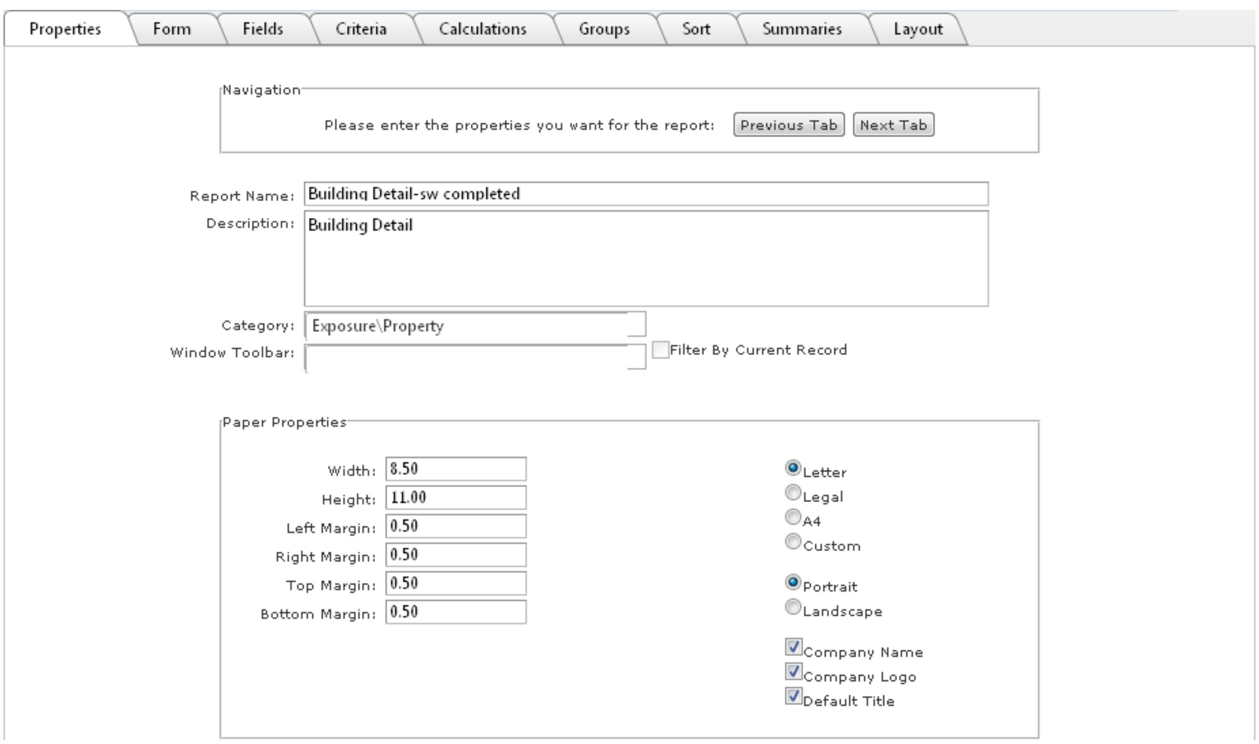
Path: Reports > Report Writer

If an existing report does not meet your needs, you can create an entirely new report.

From *Reports > Report Writer*, click the *Create Report* button to launch the Report Writer.

Note: The following topics discuss each of the Report Writer pages in sequence. If you do not need to use some of the topics such as calculations or groups, you can click the desired Tab and go directly to the next applicable page. For example, you can set your criteria and go directly to the *Layout* Tab if you do not need to add other refinements such as calculations and sorts.

PROPERTIES TAB



Path: Reports > Report Writer / Properties

The *Properties* Tab of the *Report Writer* window is used to set up general properties for the report such as a name, description, and paper size.

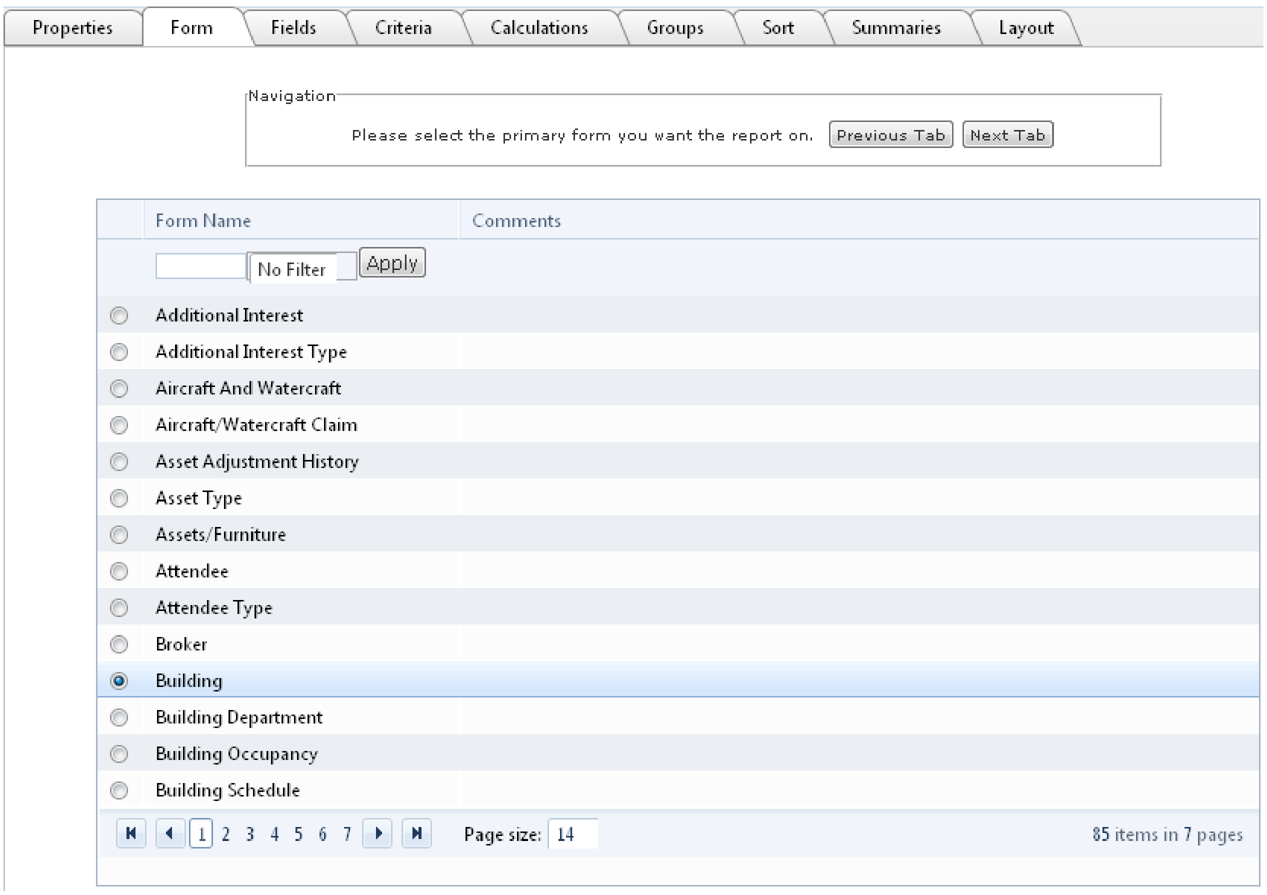
The *Category* field shows the associated section of the RiskPartner *Report Manager* window where you can select and run the report. If you do not select a category, the report is only available from the Report Writer.

The *Window Toolbar* field is used to associate the report with the toolbar when a selected window is open. If you mark the adjacent *Filter By Current Record* check box, the report generated will display as a report for the record that is visible when you click the toolbar report button.

You can display your company name and logo and add the default title for your report.

The following topics discuss each of the *Report Writer* Tabs in sequence. If you do not need to use some of the features such as calculations or groups, you can click the Tabs at the top of the page and go directly to the next applicable page. For example, you can set your properties, form, fields, criteria, and go directly to the *Layout* Tab if you do not want to add other refinements.

FORM TAB



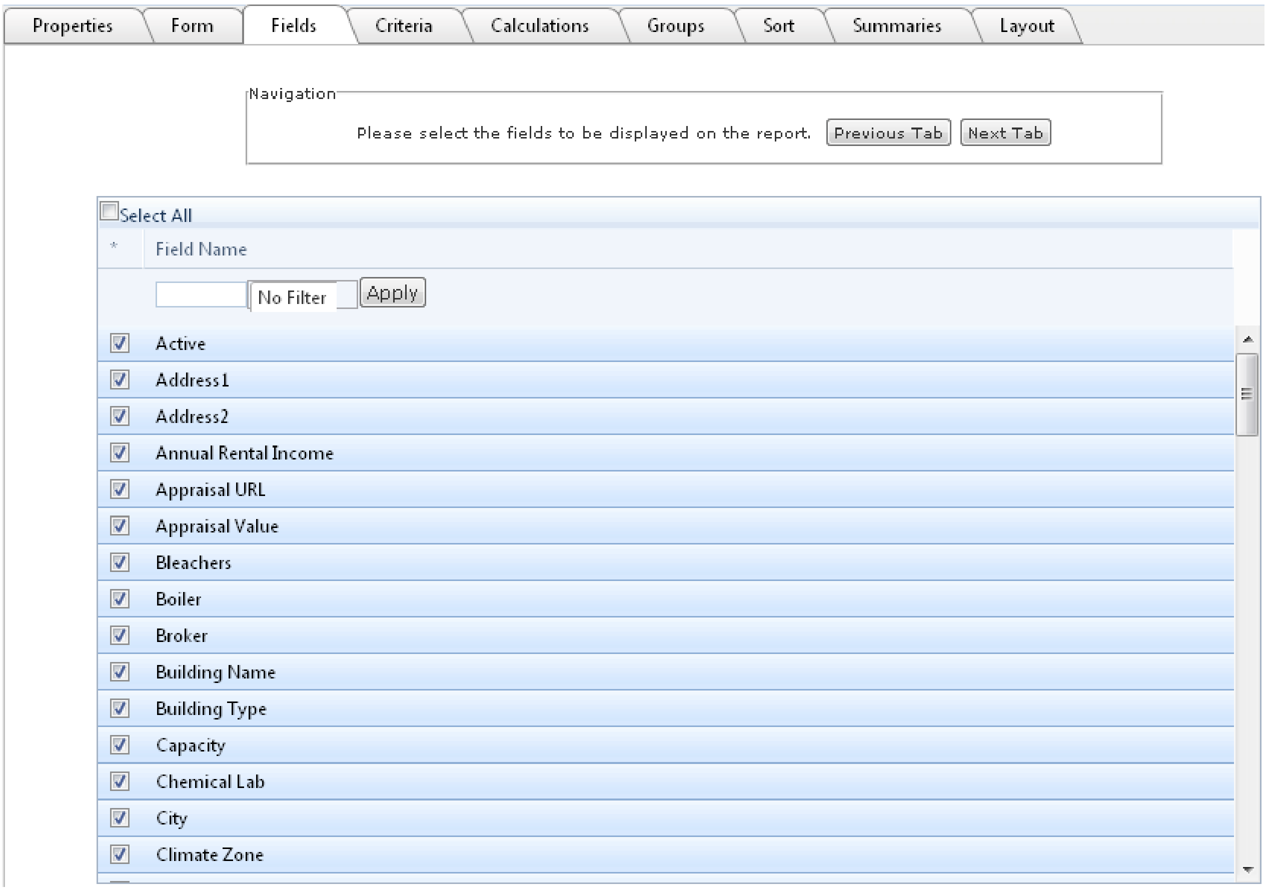
Path: Reports > Report Writer / Form Tab

A form is similar to a template. In this case, the form includes the fields related to a module of the same name, such as *Additional Interest*, *Broker*, etc. Scroll to browse the list, or use the filter field to find the desired field. Select the one that best meets your report objectives. If you elect to copy an existing report, the form for that report is selected for you.

Only one form can be selected per report, and the forms listed on this window do not include every field for every module. However, you can create other reports and use them as sub-reports in the layout. This allows you to incorporate the needed fields in one report. See About Sub-reports on page 134 for information on sub-reports.

By default, the *Form* window displays all available forms, but you can filter the names. Information about the use of the filter is found in Filter Reports by Name on page 116.

FIELDS TAB



Path: Reports > Report Writer / Fields Tab

The Report Writer simplifies creating a report because it shows the field names for the form you want to report on. You do not need to know table names or column names. The form includes the same field names that are visible on the interface.

There is no need to look up or remember column names to build the report. Behind the scenes, the form also handles report writing terminology such as "Join" as well as how to access the data. For users who are familiar with writing reports, you can only pick one external table, i.e., only one outer join.

Similar to the *Form* Tab, you can type characters in the field at the top of the list and use the filter field to reduce the length of the list.

HOW TO ADD FIELDS TO A REPORT

The field names are the same as those you see in the RiskPartner application. The joins and connections between the data are handled for you.

16. Click the check box at the left of each field to be included in the report.

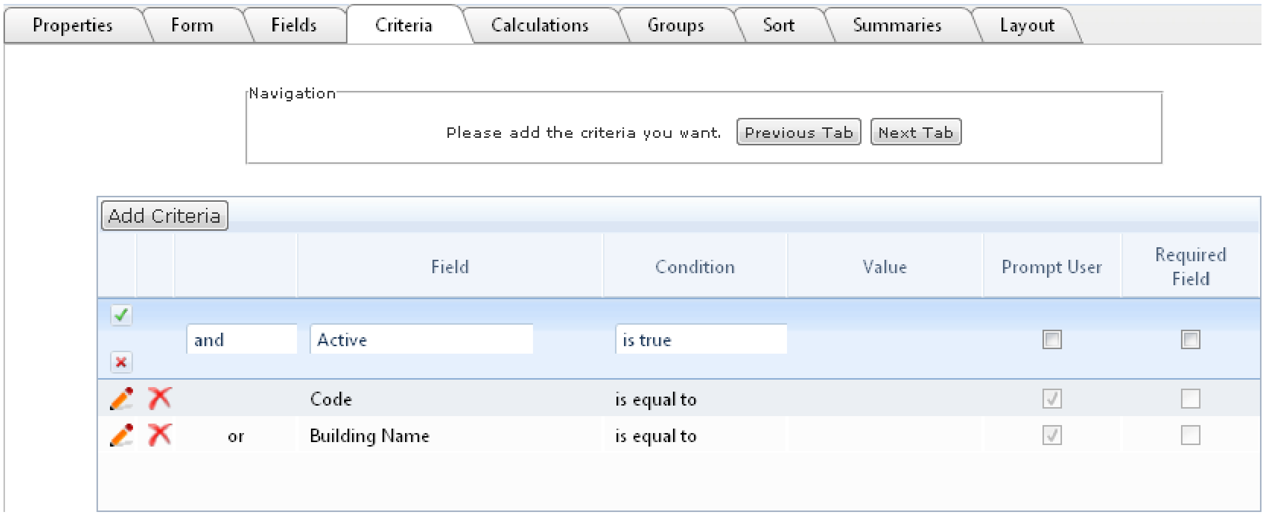
17. Click the * asterisk at the top of the grid to sort your selections. They are grouped together at the bottom or top of the list.

18. Click the *Field Name* label to toggle the sort from ascending to descending.

19. Click the *Next Tab* button to open the *Criteria* Tab.

If you decide you want a different selection of fields, you can return to this window to clear any selected check boxes or add others if needed.

CRITERIA TAB



Path: Reports > Report Writer / Criteria Tab

The *Criteria* Tab is used to set the criteria for any of the fields available on the form you selected. Criteria settings are not required for a report; however, if you want to see specific data or limit the report to a time period, include criteria lines to filter your results.

When you select criteria, you can choose to:

- Prompt for input when the report is run (Prompt User check box)
- Require input when the report is run (Required Field)

Use and availability of the *Value* and *Field* fields depends on your other selections.

If data is optional, users can add a value or leave the field blank. You can also add default values, so the criteria are ready each time you run the report. If you populate the *Value* field, the user will be limited to the value you have entered on this page.

If you have more than one line included on the *Criteria* Tab, an *And/Or* field opens.

- AND is used when you specify more than one line of criteria and the results must match both sets of criteria.
- OR is used when you specify more than one line of criteria and the results must match at least one criterion.

HOW TO ADD CRITERIA IN REPORT WRITER

The fields you selected are available to use as criteria.

20. Click the *Add Criteria* button.

21. Choose *and* or *or*.

22. Select a *Field* and *Condition* from the selection lists.

23. (Optional) Type a *Value*. This may not be needed depending on the condition you choose.

24. (Optional) Check the desired check box or boxes for *Prompt User* or *Required Field*.

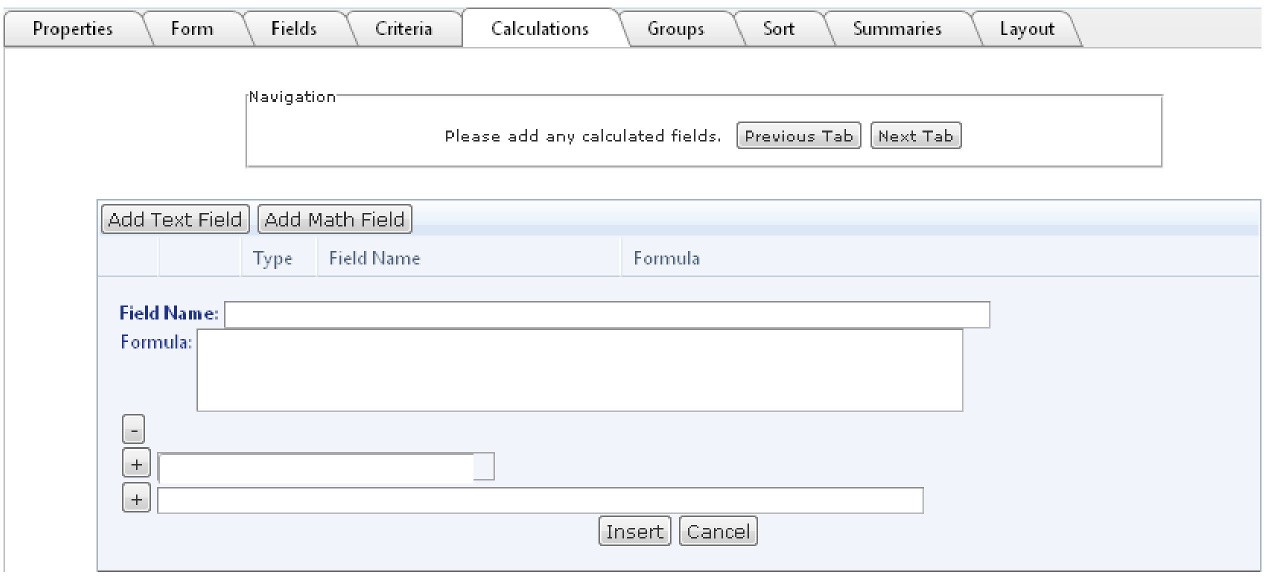
25. Click the green check icon to save the line.

26. (Optional) Repeat to add more lines.

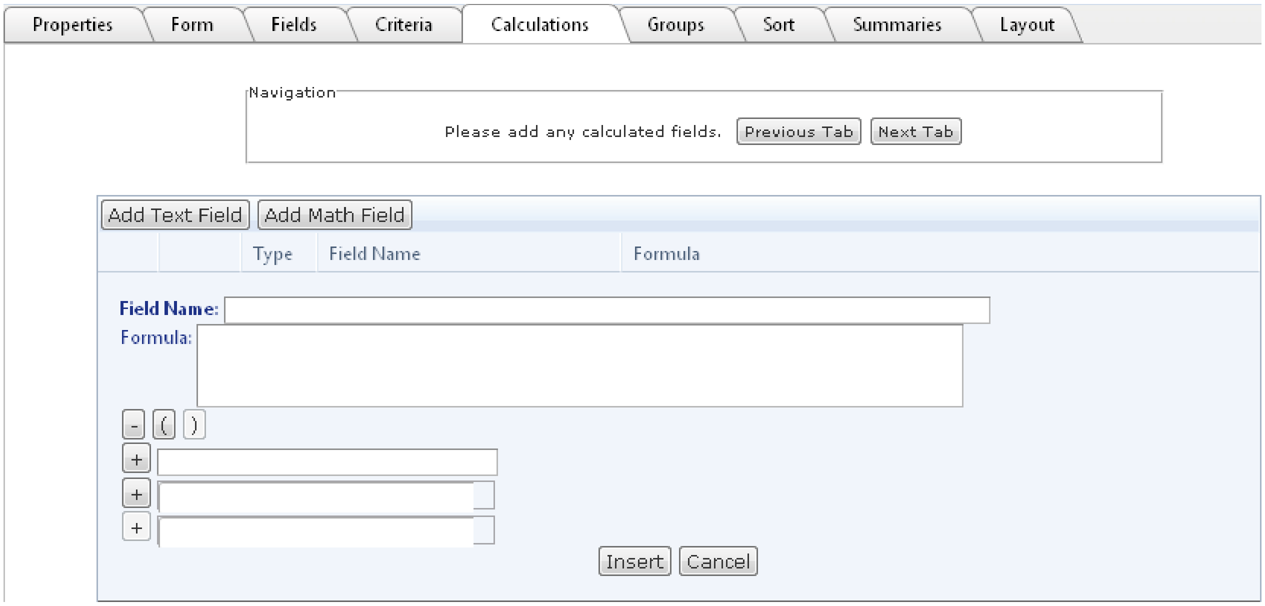
The same general process applies to the rows when you add a Group.

You may want to go to the *Layout* Tab and click the *Save* button to save your work. This is not required but is recommended if you have a complicated set of Criteria.

CALCULATIONS TAB



Path: Reports > Report Writer > Calculations Tab (Add Text Field)

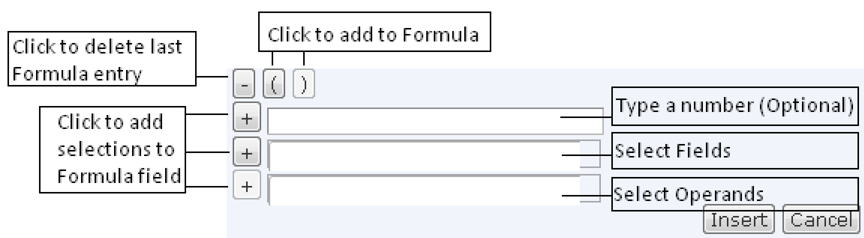


Path: Reports > Report Writer > Calculations Tab (Add Math Field)

The *Calculated Fields* Tab pertains to both text and numbers. Use the *Add Text Field* button to join two fields in a cell, for example *First Name* and *Last Name*.

To calculate fields, use the *Add Math Field* button. These calculated fields can be selected for use in the final report layout.

HOW TO ADD CALCULATED FIELDS IN REPORT WRITER



Path: Reports > Report Writer > Calculations Tab (Add Math Field)

The following steps show how to specify fields you want to combine. These are available as options to add to your report layout.

27. Click the *Add Math Field* button on the *Calculations* Tab.

28. Type the name of the new calculated field in the *Field Name* field.

29. Use the blank fields to select items for your calculation.

30. Click the + button to the left of the field each time you make a selection. This adds the number, field, or operand to the *Formula* field.

31. Click the *Insert* button on the window to save your calculation.

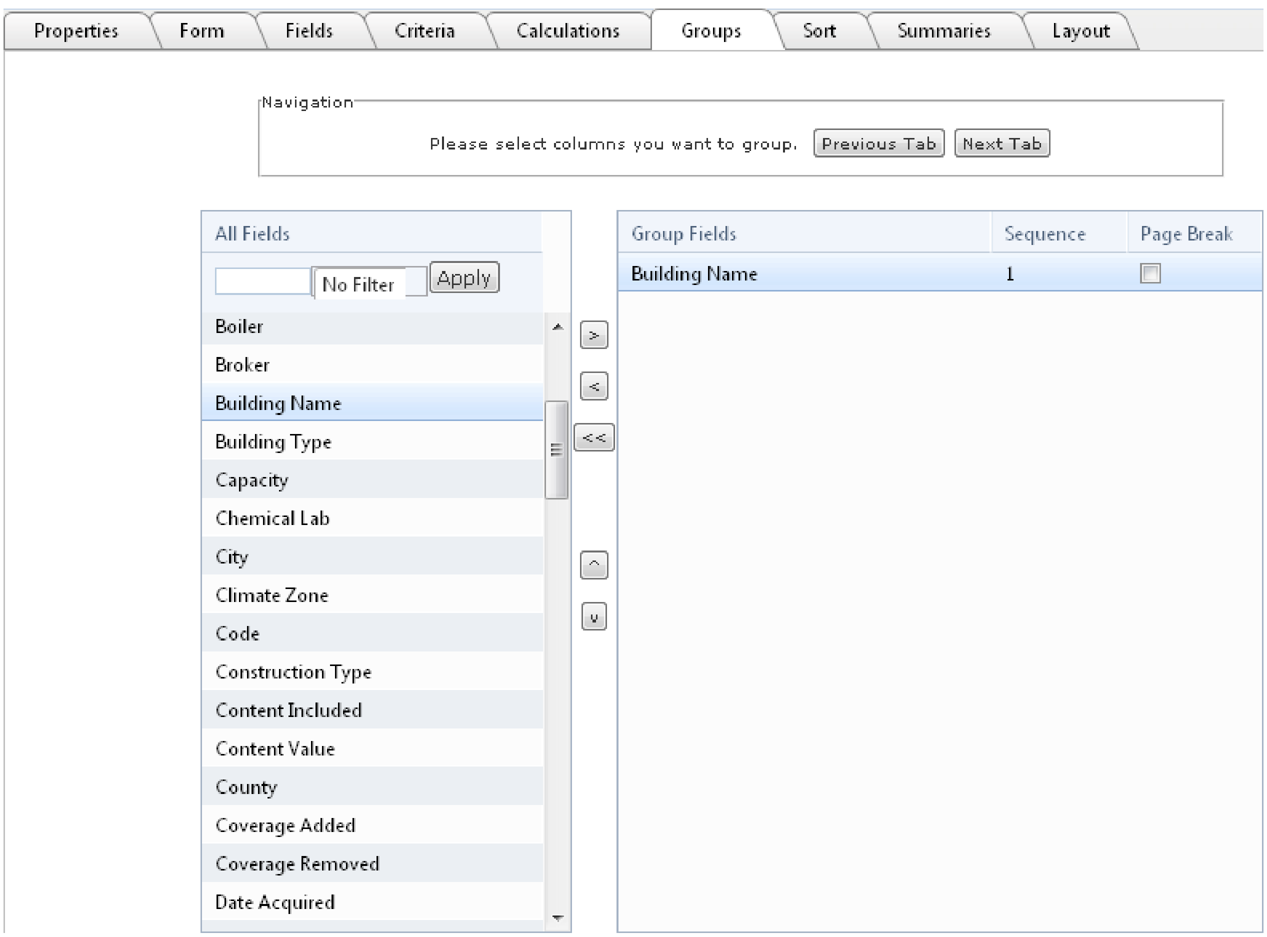
To change a portion of the formula during the creation process, click the minus sign  button to remove the last item added to the formula. Click repeatedly to remove the segments one-by-one. If you want to clear the calculation, click the *Cancel* button.

After you have saved your new report, you can also use calculated fields on the *Summaries* Tab.

CALCULATED FIELDS OPERATORS

In addition to the standard add, subtract, multiply, and divide, the *Operator* selection window includes a % symbol, which represents *Modulus*. Use this operator to instruct the calculation to return the remainder of the division.

REPORT WRITER GROUPS TAB



Path: Reports > Report Writer / Groups Tab

Grouping allows you to view the report in a more organized format. You can display your data grouped by any field in a report.

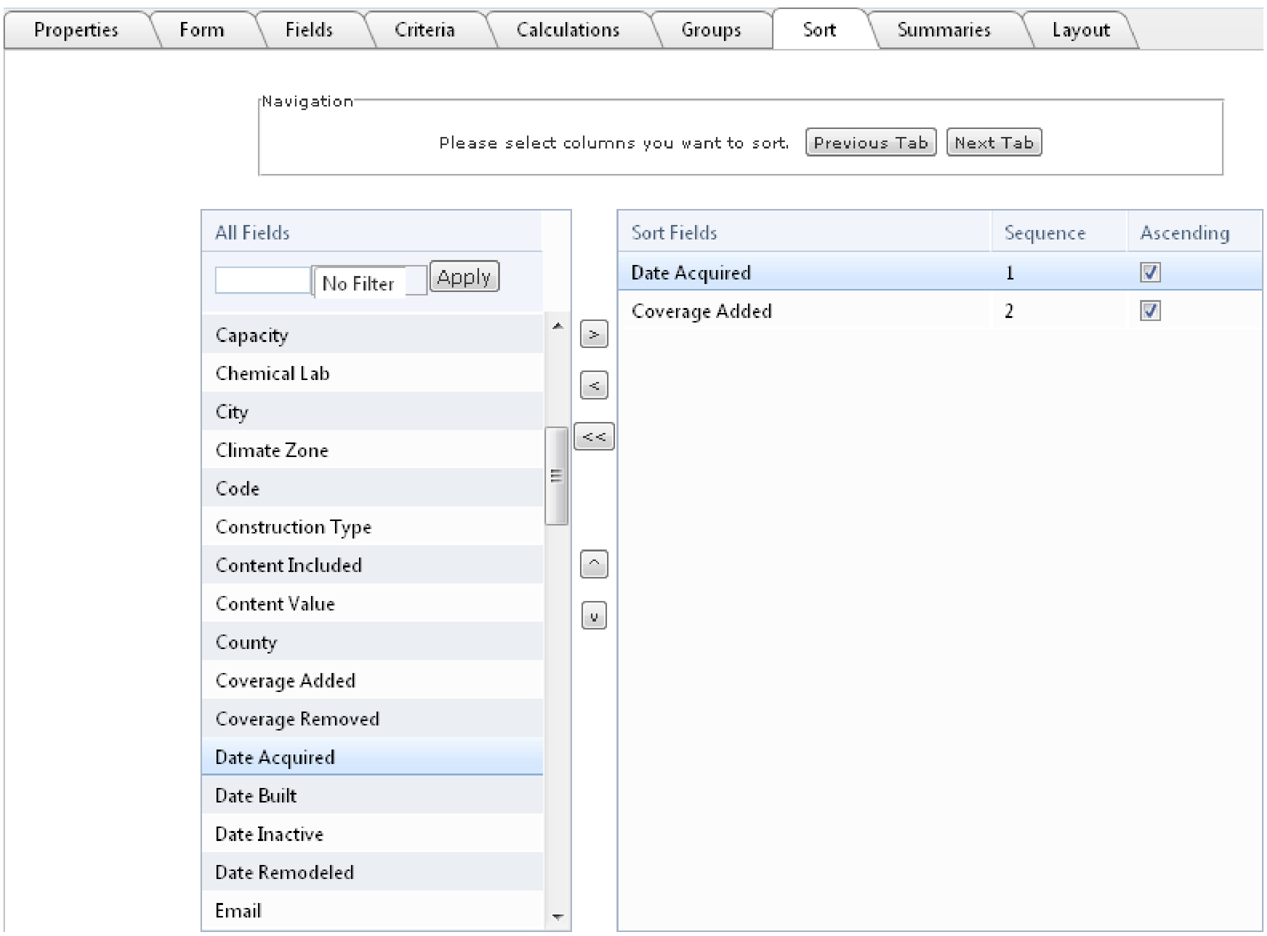
By using the Groups option, you create a high level sort.

In the left pane, highlight the fields you want to see, and click the right arrow between the two panes to list the selection in the right pane. If you want to delete a line from the right pane, highlight the line in the right pane, and click the left arrow.

Sort the lines using the up and down arrows. The assigned sort *Sequence* number changes as you move a field up or down.

To start data on a new page, click the *Page Break* check box beside a given line item.

REPORT WRITER SORT TAB



Path: Reports > Report Writer / Sort Tab

This step allows you to set up the sorting options for your report. You can sort by any field in the report and specify if the sort order is ascending (A-Z, 1-9) or descending (Z-A, 9-1).

If you have specified a group, RiskPartner suggest you select the *Group* field first.

HOW TO ADD A SORT IN REPORT WRITER

32. Select a field in the left pane.

33. Click the arrow button to add the sort field to your report.

34. (Optional) Click to clear the *Ascending* check box if you want a descending sort.

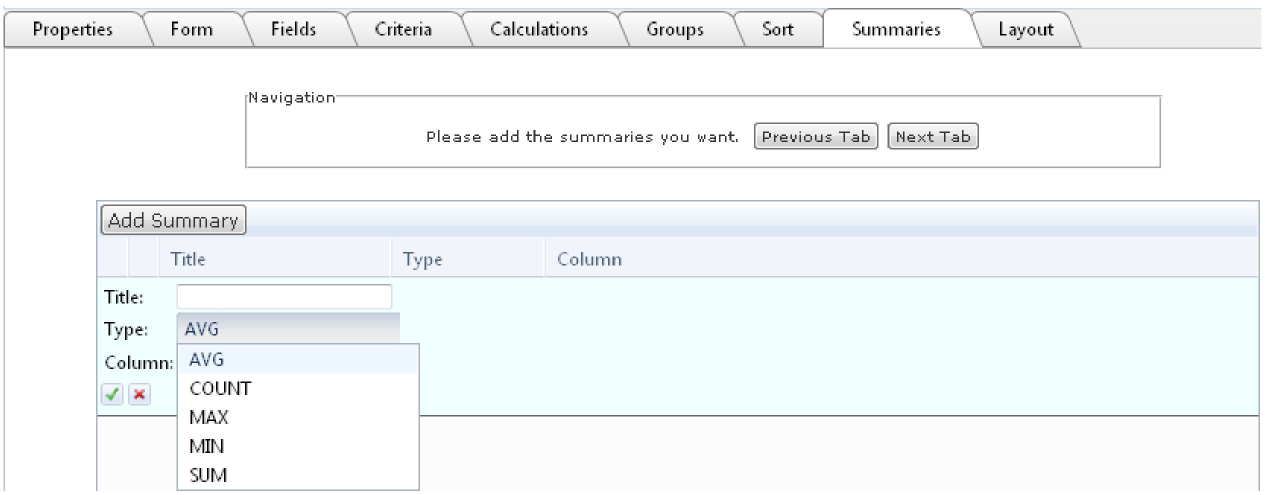
35. Add other sort fields if needed.

36. Click the *Next Tab* button.

The *Sequence* column indicates the sort order. Arrange the order of importance for multiple sort lines using the up and down arrow buttons.

Note You can select from any field that is listed on the *Fields* Tab. The report includes these fields as part of the sort criteria even if the content of the field is not displayed on the report itself.

Report Writer Summaries Tab



Path: Reports > Report Writer / Summaries Tab

Use the *Summary* Tab to specify numeric fields to calculate in columns (vertical calculation). These totals are shown in the footers of the report layout.

Only fields that qualify for this type of calculation are available for selection.

You can choose a summary type of:

- AVG
- COUNT
- MAX
- MIN
- SUM

HOW TO ADD SUMMARIES IN REPORT WRITER

All fields are required on this window.

37. Click the *Add Summary* button.

38. Type a summary *Title* that is easy to identify.

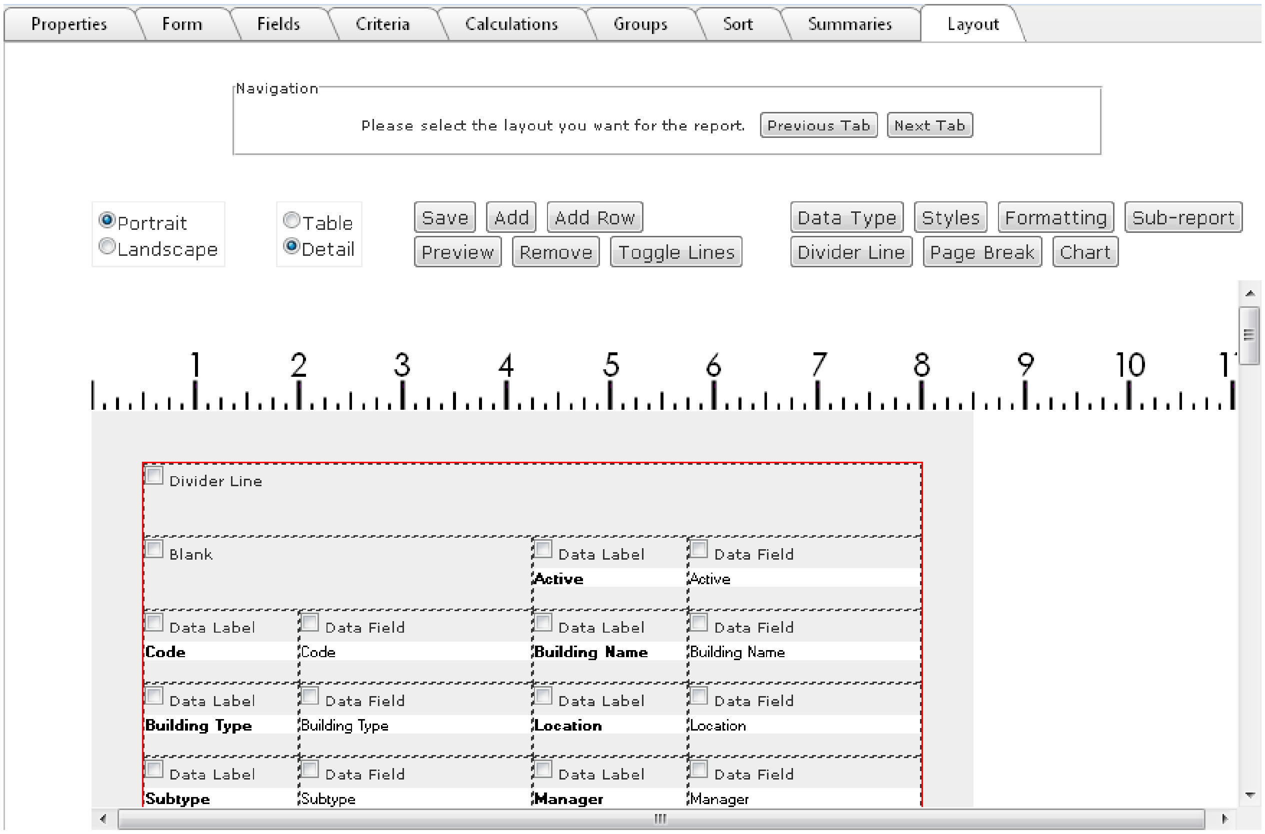
39. Select the summary *Type*.

40. Select the *Column* (field name) you want to summarize.

41. Click the green check icon.

Your summary selections appear in the grid.

REPORT WRITER LAYOUT TAB



Path: Reports > Report Writer / Layout Tab

The final part of the report is the layout. Use this Tab to save your report and to specify how you want the fields displayed. You can go to this Tab, select a style (*Table* or *Detail*), and click the *Save* button before you are ready to make final layout decisions, for example, when you add complex calculations. This assures that your work is saved as you design your report.

CAUTION: RiskPartner displays data in a Table style or a Detail style. Your style selection depends on the type of report you need. Think carefully about how you want to view your report, because each time you switch between Table and Detail, RiskPartner deletes any format, styles, or other layout settings you have made.

The page orientation set on the *Properties* Tab shows here, but you can change it on the *Layout* Tab as well.

The Date/Times on reports reflect the current user's settings.

Click the *Preview* button to display the report in the default print format if one has been selected. Reports print in .pdf format, and page numbers are standardized in the format n/n, such as 1/3 indicating page one of three pages.

Since forms do not include every field for every module, you can add another report as a sub-report. This incorporates all the fields from the sub-report in your report. See About Sub-reports on page 134 for more information.

TABLE STYLE REPORTS

The Table style is similar to an Excel spreadsheet. The number of columns does not have to match on every Subtab within the *Layout* Tab. However, the total width and column span must match on each Subtab, i.e., Header, Data, and Footer, if there are any fields within the Tab, or it can have no fields at all. By default, the header labels are bold.

If you want to indicate page breaks in a Table style, use the *Page Break* check box on the *Groups* Tab.

DETAIL STYLE REPORTS

The Detail style gives you more flexibility in arranging data and allows you to use dividing lines between each new set of data.

The *Page Break* button applies to the Detail style and adds a blank page at the beginning or end of a report.

By default, the system adds *Data Label* fields related to each *Data Field*. The data labels are in bold. While it is possible to select an existing data field to create your chart, it is advisable to add a new field when you add a Chart; otherwise, the results may not be what you expected.

You may prefer to create a separate report that includes your graphics and use it as a sub-report. In addition, you can create reports made up of charts for a quick graphic view of the data.

ABOUT SUB-REPORTS IN REPORT WRITER

If the form you select does not include all the fields you need, you can supplement your report with sub-reports.

Existing reports are used as sub-reports regardless of whether the term 'sub-report' is included in the title of the report.

The sub-report can be in one style, such as a Table, and the primary report can be in the other style.

Note All the fields from the sub-report are included in the new report. Make sure your sub-report does not contain numerous unwanted fields. RiskPartner ignores the sub-report's title, logo, margins, etc.

LAYOUT TAB FUNCTIONS

The available layout buttons change depending on whether you use Table or Detail style.

If you want to experiment with the different styles, save your basic report and make a copy with a slightly different name. Initially, you may want to experiment to determine the type of layout that works best for you. Having two copies of the report, one in Table style and one in Detail style, saves time because each time you switch between styles on the same report, all formatting and other selections are cleared from the fields.

TIPS FOR USING THE LAYOUT TAB

Click the *Save* button frequently. Until you save, your changes are not stored. As mentioned previously, you can go to the *Layout* Tab during the process of creating a report and save your report. This is especially useful when you create complex Criteria and Calculations.

Click to put a check mark in the box or boxes you want to affect. Remember to click the *Apply* button on the button-related window to record your changes.

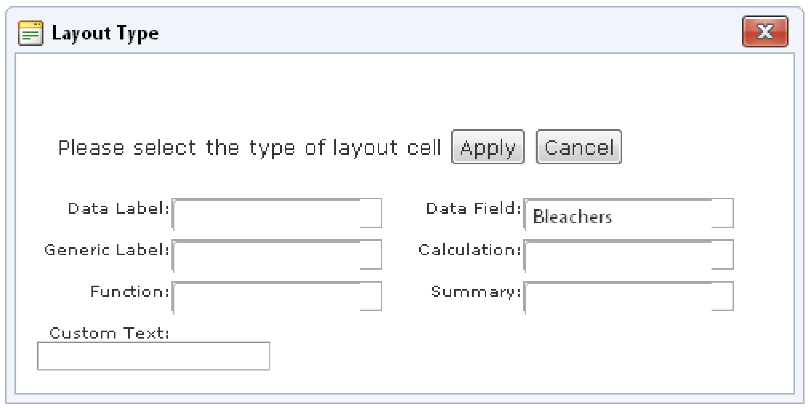
The action buttons such as *Save*, *Preview*, *Add*, and *Remove* as well as the arrow buttons do not open a separate window. They perform the actions indicated. Click the check box of the cell you want to rearrange in the layout, and drag and drop to move the cells around the layout.

The *Add* button adds a new blank field that you can use as a data field, a label, a chart, or blank. When you want to align data in a particular design, use blank fields as spacers. Be sure to format the size of blank fields exactly as the other fields in the column.

The *Remove* button deletes the field or fields that are checked. If you remove a field and change your mind, exit the report without saving.

Be sure you mark a field check box before you click any buttons. Unless you tell RiskPartner what field you want to affect, nothing happens.

DATA TYPE SELECTIONS



Use this button to determine the kind of data the field will display. You can make only one selection on this window. When you make a selection in another field on the window and tab out of the field, the system automatically clears the previous selection. Fields are either Labels (text) or Data.

The fields on this window are defined as follows:

Data Label – Select the label you want for this field. Choose from the available list.

Generic Label – The selections on the list for this window are predefined by RiskPartner.

Function – Select one of the built-in data functions provided by SSRS.

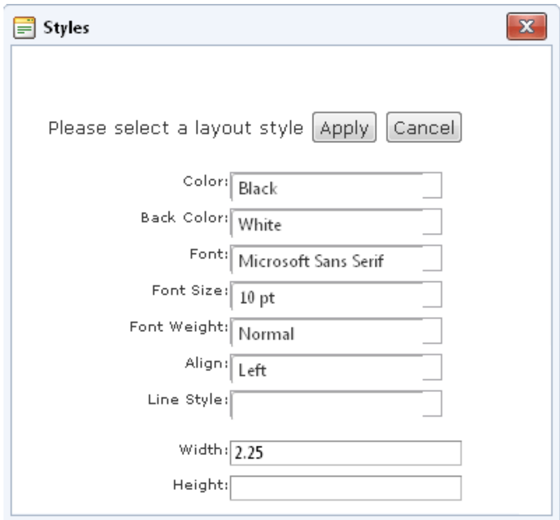
Custom Text – Type your own text if you want to customize a Data Label.

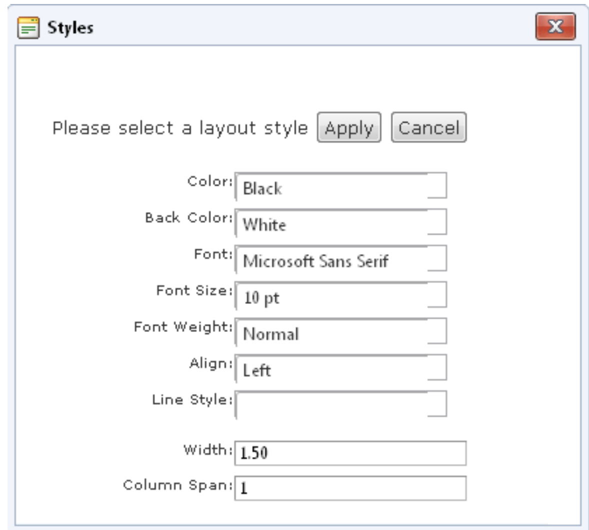
Data Field – Select one of the fields from the *Fields* Tab.

Calculation – If you have created calculations on the Report Writer Calculations Tab, you can select one here.

Summary – If you have created summaries on the *Report Writer Summary* Tab, you can select one here.

STYLES SELECTIONS





Path: Reports > Report Writer / Layout Tab

Use Styles to determine the appearance of your data. Be sure to check at least one cell in your layout before you click the *Styles* button.

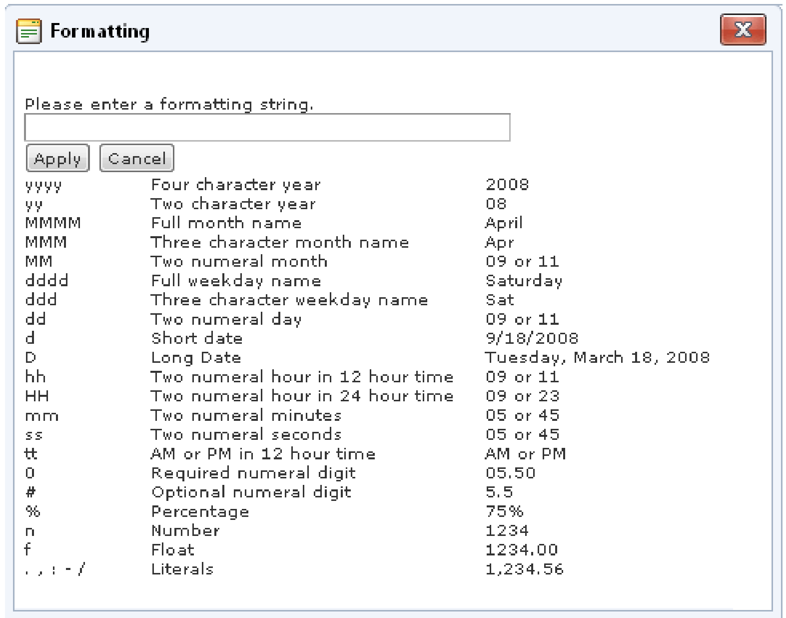
Notice that the last field changes depending on your selection of Detail or Table style layout.

Use the *Height* field when you select a Detail style report to size the area in your report and assure there is room to fully display the data such as a bar code or a graph.

Use the *Column Span* field when you select a Table style report. This option is used to encompass the number of table columns you designate. Be sure to give the Header and Footer columns the identical column span so RiskPartner can display the report.

Other fields on this window are similar to style settings in most computer applications. Note the *Font* field includes Bar Code in the selections. If you want the selected data field to print as a Bar Code, select it here.

FORMATTING SELECTIONS



yyyy	Four character year	2008
yy	Two character year	08
MMMM	Full month name	April
MMM	Three character month name	Apr
MM	Two numeral month	09 or 11
dddd	Full weekday name	Saturday
ddd	Three character weekday name	Sat
dd	Two numeral day	09 or 11
d	Short date	9/18/2008
D	Long Date	Tuesday, March 18, 2008
hh	Two numeral hour in 12 hour time	09 or 11
HH	Two numeral hour in 24 hour time	09 or 23
mm	Two numeral minutes	05 or 45
ss	Two numeral seconds	05 or 45
tt	AM or PM in 12 hour time	AM or PM
0	Required numeral digit	05.50
#	Optional numeral digit	5.5
%	Percentage	75%
n	Number	1234
f	Float	1234.00
. , : - /	Literals	1,234.56

Path: Reports > Report Writer / Layout Tab

Click the *Formatting* button to open this window and set the appearance of date, time, and numeric data.

The list shows the character string codes. Type your selections in the field at the top of the window. Use the Literals (. , : - /) for dividers as appropriate. You can also press the space bar if you want a space between selections such as MMMM D, yyyy to display October 20, 2008 for example.

Scroll down for examples of the various codes. The examples are listed in the same sequence as the preceding codes, i.e., yyyy 2008, yy 08, MMMM April, etc.

DIVIDER LINE AND PAGE BREAK

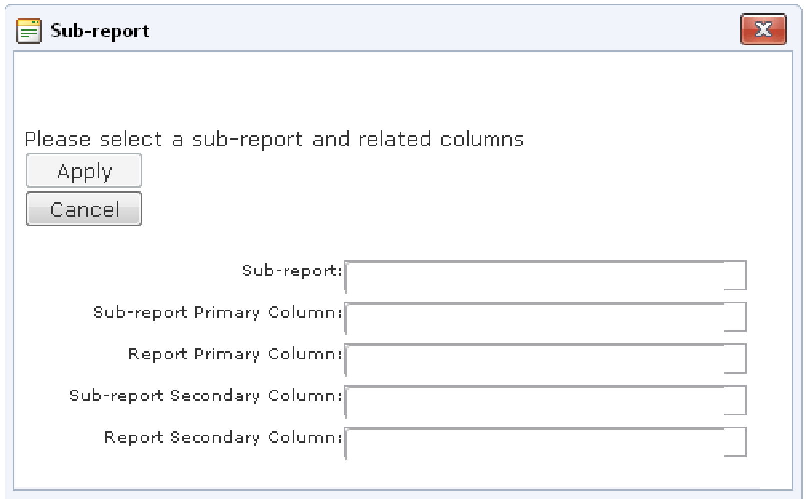
Path: Report Writer / Layout Tab

The *Page Break* and *Divider Line* buttons are exclusive to Detail style reports. No window opens when you click the buttons, rather RiskPartner automatically inserts a cell at the beginning of the data cells and the cell is checked.

The *Page Break* button is used to insert a blank page at the beginning or end of the report. If you place a page break cell anywhere else, it is ignored.

The *Divider Line* button operates in much the same way as a page break; however, you can place the divider line anywhere among the cells. Unless you have a particular need, this may create more confusion in reading the report, but the option is available to you.

HOW TO SELECT A REPORT WRITER SUB-REPORT



Path: Reports > Report Writer / Layout Tab

When you select the same column in both the report and sub-report, you link the two reports. Unless you specify these common data columns, the sub-report is not included.

Be sure these columns contain data that is not duplicated in the database. For sensible results, be certain that you select a field containing unique data such as Building code or Location code. In contrast, a column such as a building name could have many occurrences in the data.

To include a sub-report, follow these steps:

42. Click the *Add* button to create a blank cell. It is checked by default.
43. Click the *Sub-report* button.
44. Select the name of the Sub-report.
45. Select the *Sub-report Primary Column*.
46. Select the *Report Primary Column*.
47. (Optional) Select secondary columns for the sub-report and report.*
48. Click the *Apply* button.

A secondary sub-report, i.e., a sub-report within a sub-report, is used for very advanced report writing. Rarely will you use this feature. For the most part, you can include two independent sub-reports to display the data.

CHART SELECTIONS

Path: Reports > Report Writer / Layout Tab

The *Chart* button is available with Detail style reports **only**. Use this option to design graphic representations of your data. You can select any combination of types and fields, **as long as they make sense**. The system will not create a graph if the input is not logical.

On the *Chart* window, the *Title* field is not required, but you may want to add one to help identify the data.

Select the graph style in the *Type* field. You have many choices as well as a 3D check box if you want a three-dimensional graph.

When you click the *Add Data* button, select the *Type*, *Sub-type*, and *Column*.

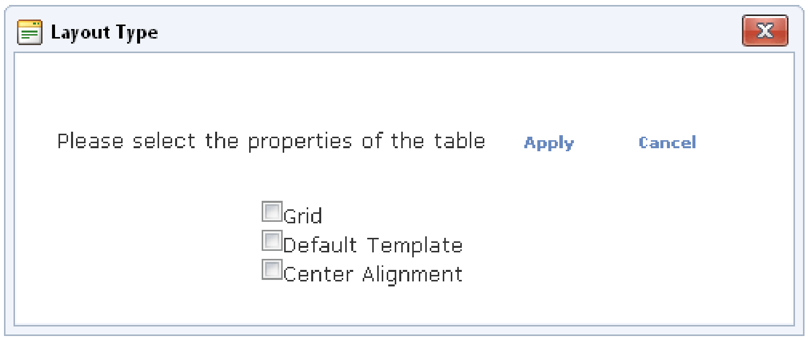
The data Type selections are Field or Group, and the Sub-types differ depending on your type selection.

Selections available in the *Column* field include any of the fields you have selected for your report.

When selecting your charts, at least one Type/Sub-type needs to be Field/Count.

If you include a field in the chart, it must have a group specified on the *Group* Tab. Without a group, the chart doesn't display in the report.

TABLE LAYOUT SELECTIONS



Path: Reports > Report Writer / Layout Tab

The *Table Layout* button applies only to Table style reports. Use it to determine the appearance of the table on the page.

If you make no selections, the entire table is aligned to the left of the page without any grid lines or other formatting.

The *Grid* option outlines each cell and adds a contrasting background to alternate rows.

The *Default Template* option adds a contrasting background to the header row at the top of each page.

The *Center* option centers the entire table on the page. It does not center individual columns in the table.

IMPORT WIZARD

IMPORT WIZARD HOME PAGE

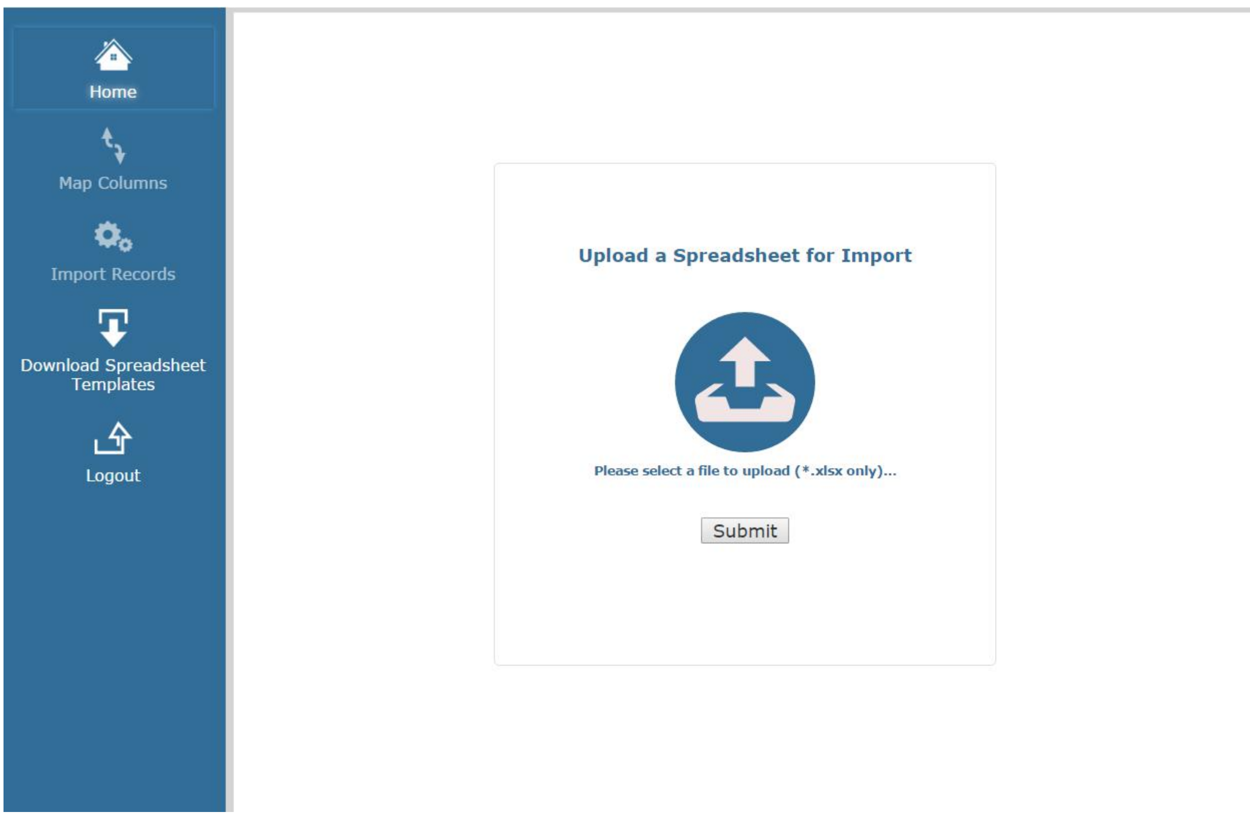
The login screen resembles the portal login screen and accesses the RiskPartner user database similar to portal windows. You can login with your regular RiskPartner login ID.

At any time, you can return to the Home Page by clicking the 

icon on the Portal menu bar.

NOTE: By design, RiskPartner limits the number of records that can be imported to 3,000 at one time. Remember that others may be using the tool as well, and a large number of simultaneous imports can lock up the application servers.

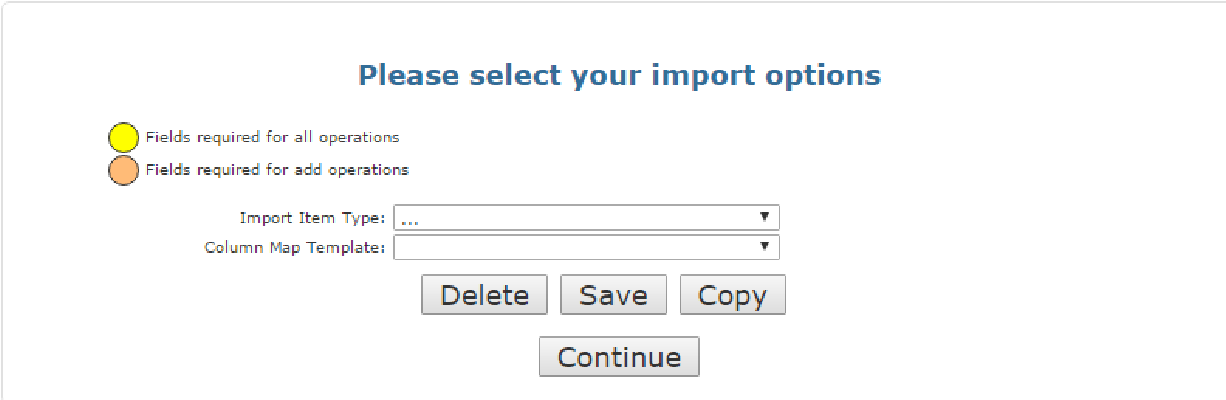
UPLOAD SPREADSHEET



Once logged in to the Import Wizard, you see the import *Home* window. Use the window to select and upload an Excel spreadsheet. Note: The Import Wizard accepts **.xlsx files only**.

Browse to select the .xlsx spreadsheet, and click the *Submit* button. The selected file is uploaded to the RiskPartner Import Wizard system and the *Column Mapping* window opens.

Column Mapping Page



Mapping is required to insert your data into the appropriate column in RiskPartner. The *Column Mapping* window is used to select the *Import Item Type* that is being imported and make the mapping connections.

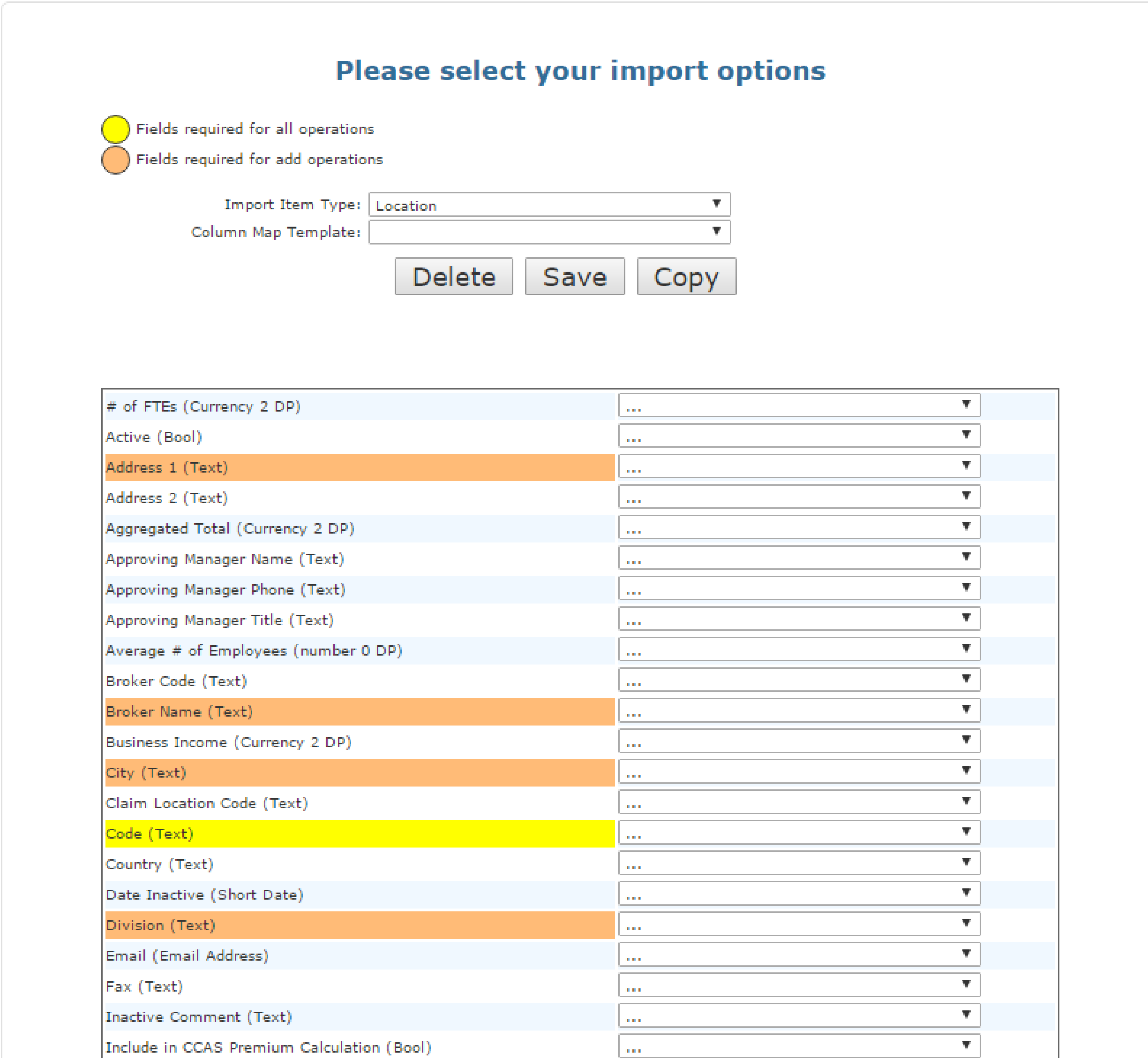
You have the option to select any of a number of Item Types, such as Area, Building, Case, Employee, Equipment, and Training.

The Item Type selection determines the RiskPartner database columns that display in the space below the import options section as illustrated in the next screenshot.

1. Click the down arrow in the fields on the right for a list of columns taken from your spreadsheet.

2. Select your column names that match the RiskPartner column names.

Note that fields highlighted in yellow are required, and fields highlighted in orange are required for Add operations.



After you have mapped the columns, you have two choices:

- Submit the mapped data for upload
- Save the mapped fields as a template before you upload

If you do not plan to use the spreadsheet layout again, follow the instructions in the next topic, Submit Mapped Data for Import.

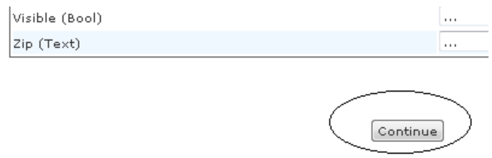
See the topic, Column Map Templates, for information about saving a regularly-used spreadsheet layout to a template to avoid having to map the same spreadsheet each time you use it.

Note: Only columns mapped from this page are updated in the RiskPartner record; all other columns are ignored. In addition, each Item Type has one *unique identifier column* which must be mapped for the import to continue. This is usually the Code or Number column.

HOW TO SUBMIT MAPPED DATA FOR IMPORT

1. Map your data as described above.

2. Scroll to the bottom of the page.



3. Click the *Continue* button.

   This action opens the final window.

4. Click the *Start Import* button on the final window.

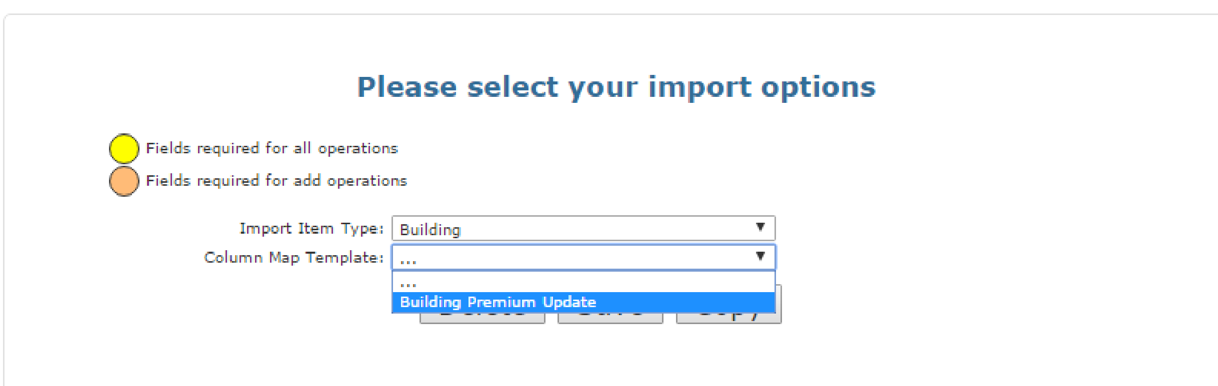
RiskPartner imports the records. If any errors are found, they are grouped in a new spreadsheet.

When problems occur with the import, you are alerted and asked to save or view the error file. Download the file, fix any issues (which are detailed in a column added to the end of each row), and upload the file into the Import Wizard following the same process as before.

Column Map Templates

If you frequently use the same .xlsx spreadsheet layout to import data, you have the option of saving a Column Map Template after you have mapped the spreadsheet.

This can be done for any number of spreadsheets that you regularly upload.

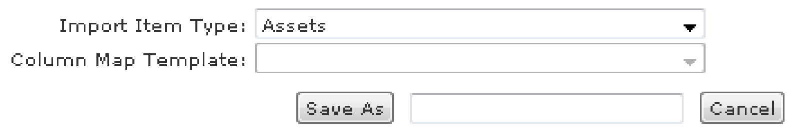


HOW TO SAVE COLUMN MAP TEMPLATES

After you have mapped the columns:

1. Click the *Save* button under the *Column Map Template* field to open an additional field adjacent to a *Save As* button.

2. Type a name for your template in the *Save As* field.



3. Click the *Save As* button.

RiskPartner stores your mapped template with the assigned name. The next time you need to import the Item Type used for this upload, click the down-arrow in the *Column Map Template* field and select the desired template. RiskPartner will automatically populate the fields with the mapped names.

Once the fields are populated, follow the instructions in How to Submit Mapped Data for Import on page 142.

HOW TO COPY COLUMN MAP TEMPLATES

At any time, you can make changes to your template and re-save it. Or, you can duplicate a Map Template, make changes, and then save it.

To make a copy of a Map Template:

1. Select the name in the *Column Map Template* field.
2. Click the *Copy* button.
3. Type a new name for your template in the *Save As* field.
4. Click the *Save As* button.

HOW TO DELETE COLUMN MAP TEMPLATES

To remove a Map Template:

1. Select the name in the *Column Map Template* field.
2. Click the *Delete* button.

RiskPartner notifies you that the template has been deleted.

PORTAL USER'S GUIDE

FOR

This document provides instructions for using the RiskPartner application to submit your renewal information.

If you have any questions, please contact one of the following service team members:

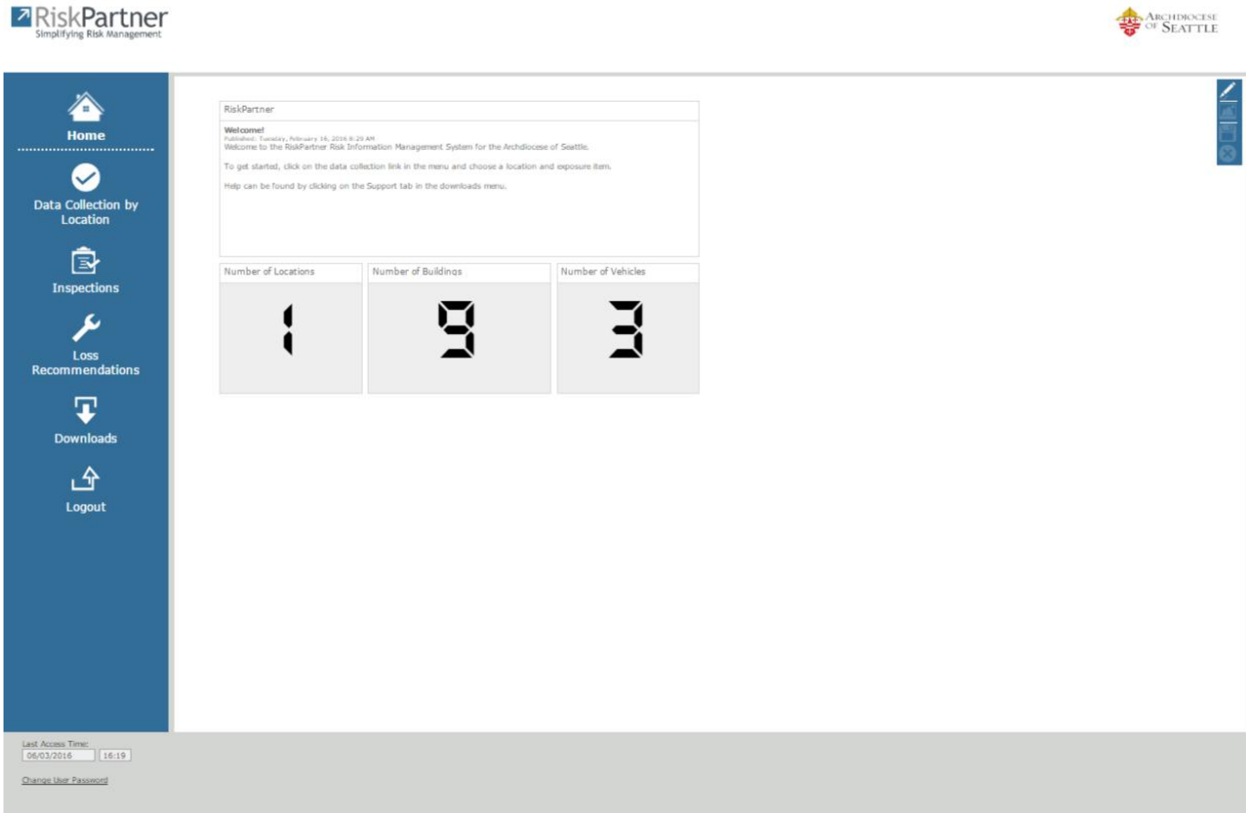
Contact	Phone:	Email:
Insurance Department	(206) 274-3120	insurance@SeattleArch.org

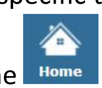
CONTENTS

LOGGING IN

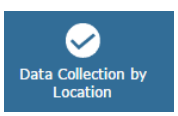
1. Click on following URL: https://login.riskpartner.com
2. Enter your Login Credentials
    a. (Login ID): Type your complete email address. (Not Case Sensitive)
    b. (Password):
        i. **Returning Users**: Use your existing password. If you have forgotten your password, click **I forgot my password** and initiate the password reset process. Once you have changed your password, click **Save** at the bottom of the screen.
        ii. **First Time Users**: Type in the word “password”. You will be required to change this after logging into RiskPartner for the first time.
    c. (Client): Type in “Archdiocese of Seattle” (Not Case Sensitive)
3. (Optional) – Check the “Remember Me” check box and the system will remember your Login ID and client next time.

HOME PAGE

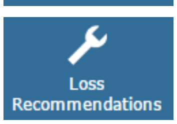


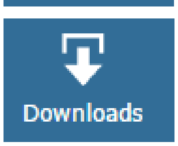
Upon Login to RiskPartner, you will notice some general data which is specific to your login displayed on the home page. You can get back to this data at any time by clicking the 

icon in the upper left. You will also notice 4 other selections. Each is listed and explained below:

- 

Data Collection: Used to review and update property and vehicle information.
- 

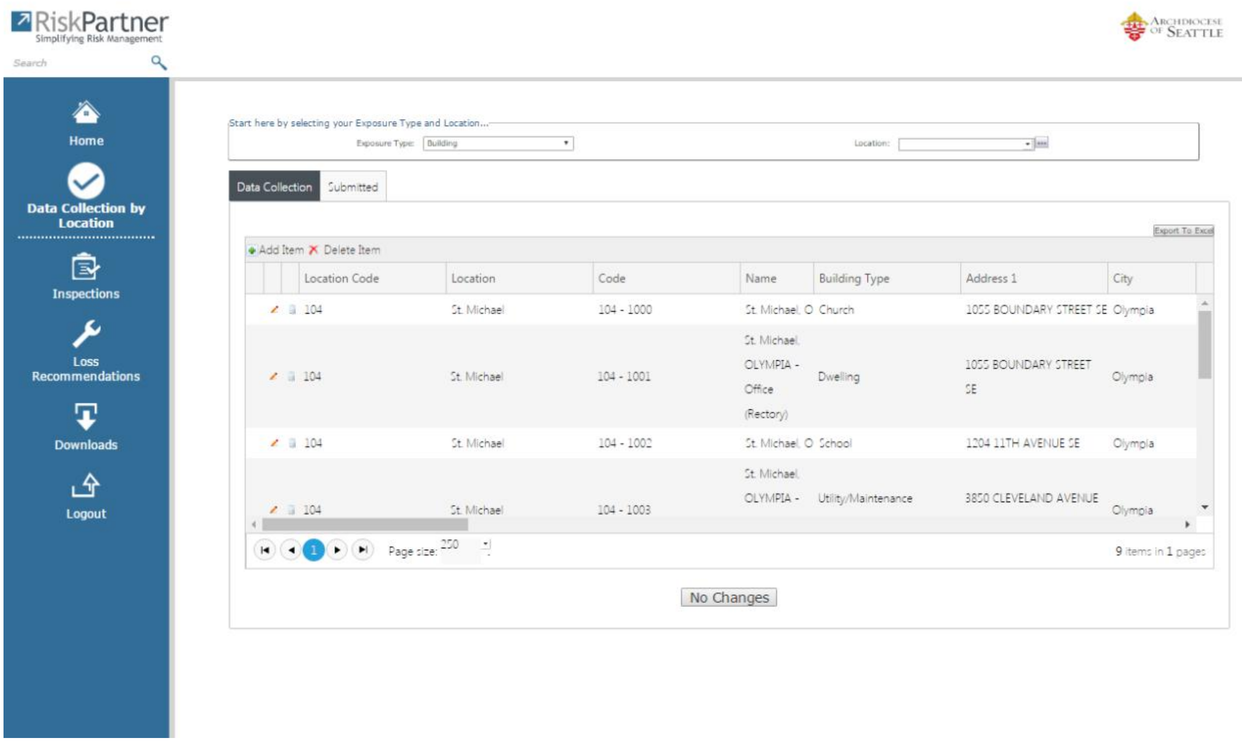
Inspections: For Future Use
- 

Loss Recommendations: For Future Use
- 

Downloads: Used to download documents such as appraisals, inspection reports, etc..

To logout, simply click on the Logout icon in the upper right corner of the window.

SUBMIT CHANGES



The Data Collection tab supports your ability to add, edit, delete, or confirm existing exposure information including: buildings, vehicles, and doctors schedules if applicable.

To review and modify your exposure information:

1. Hover over the Data Collection Menu and select Data Collection by Location
2. Make a selection in the exposure type drop down field, which is used to manage buildings, vehicles, and Dr. Schedules, if applicable.
3. Make a selection in the Location drop down field.
4. Make Changes
   a. **To add a new record**, click the Add Item icon and enter the required fields (displayed with red labels), along with any other pertinent information and click Save at the bottom of the window. The icon will show next to added items until they are approved.
   b. **To edit an existing record**, click the icon next to the item you would like to edit, make changes as necessary and click Save at the bottom of the window. The icon will show next to edited items until they are approved.

c. **To delete an existing record**, click the Delete Item icon, enter notes on why it is being deleted and click Save at the bottom of the window. The icon will show next to deleted items until they are approved.

5. Upload documents – You can upload and attach documents to exposure items (building/vehicles) while editing an existing record or adding a new record.
   a. Click on the Attach Documents button at the bottom of the exposure item window while in add or edit mode.
   b. Click the Add Document button at the top left of the Attach Documents pop-up window
   c. Fill out the file name, type, category, and description and click the Browse... button to select the file from your computer or network.
   d. Once selected, click the Save button and repeat steps b-d for each document which needs to be attached. Each file has a 20MB size limit. There is not a limit to the number of files which can be attached.
   e. Once all files are attached, click the Close button to close the file attachment window.
   f. Remember to save the Exposure Item record.

****Note: Submitted changes are not finalized until approved by an administrator. ****

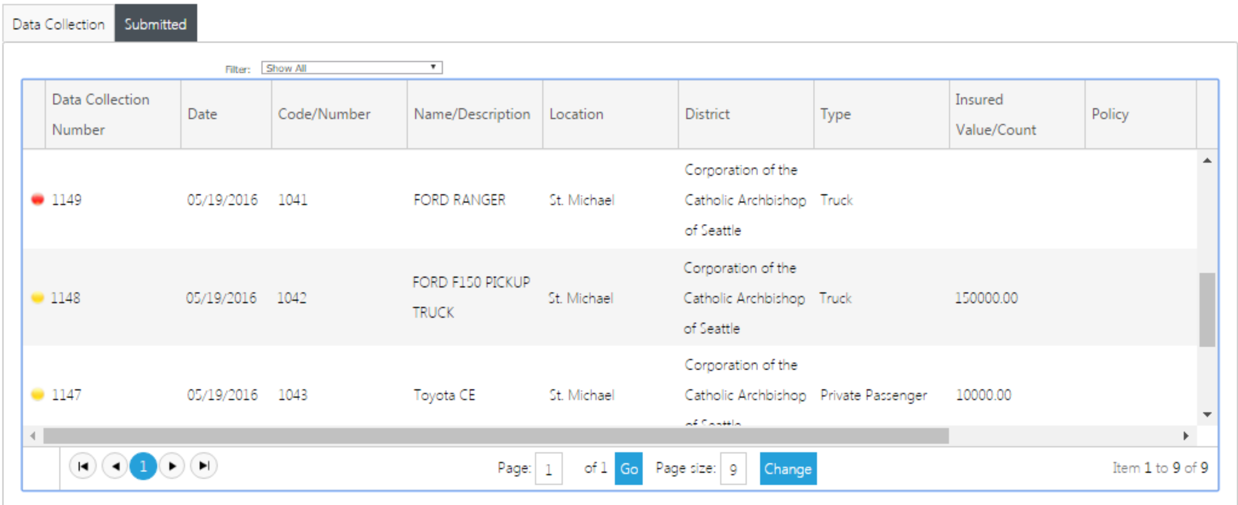
To confirm existing data is accurate without the need for changes:

1. Follow steps 1-3 above
2. Click on the No Changes icon at the bottom of the window to send a record to The Archdiocese Insurance Department letting them know that the information has been reviewed and no changes are necessary for that type of exposure.

No changes submissions only need to be submitted once, per type of exposure.

Repeat the process until you have submitted changes or a no change record for all exposure items and locations to which you have access.

REVIEW SUBMISSIONS



To view past submissions, simply click on the Submitted tab and select a filter to list approved, rejected, or pending submissions.

Click on data headers to sort information in the list. Submissions are color coded based on type of change:

Added Record

Edited Record

Deleted Record

No Changes Required

You can view the detail of any submission by double clicking on the submission to pull up the submission. If the submission is an edit, the fields which have been changed will be highlighted in red.

Data Collector

Edit

General Information

Linked Documents: ☐ Active: ☑

Tag Number: 1042

Type: Truck

Subtype:

Broker:

Location: St. Michael

Building:

Vehicle Class:

Description: FORD F150 PICKUP TRUCK

Policy:

Coverage Added: 01/13/2012

Coverage Rm'd:

Department:

Title Number:

Sub-location: PARISH

Detail

Under Svc Contract: ☐ Leased: ☐

Make: FORD

Model: F150 PICKUP TRUCK

Year: 2010

Personal Use: ☐

Puchase Price: $150,000.00

Premium: 1700.00

Rate Multiplier:

Modifier Value:

Out of Service: ☐

License #:

VIN: 1FTMF1CW6AKB85473

Seat Capacity:

No Charge: ☐

Turning Radius:

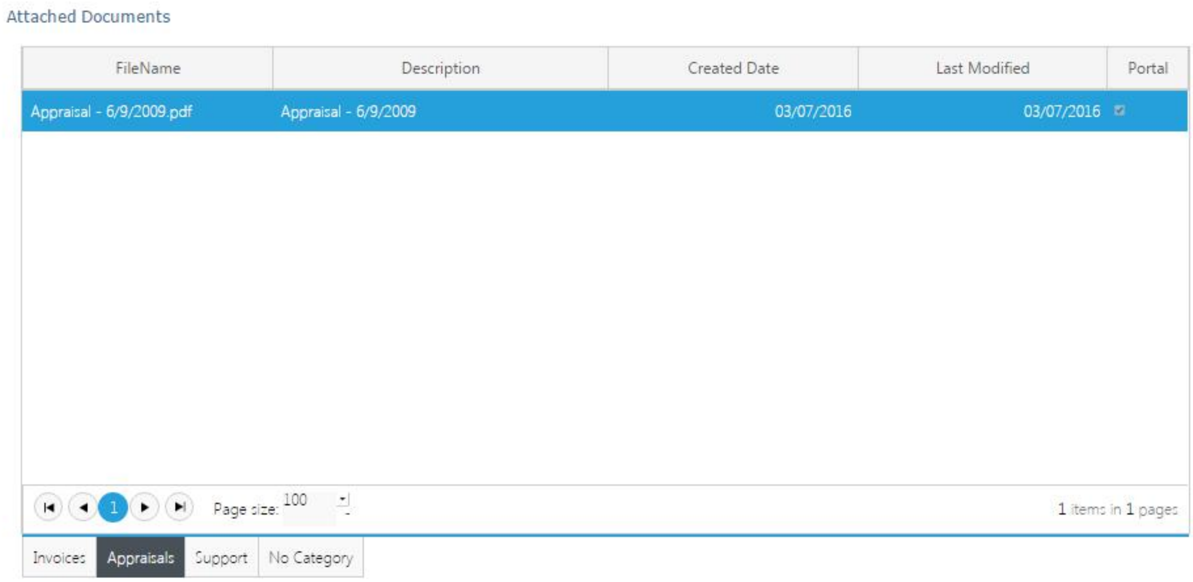
Original PO #:

Date Purchased:

Comment:

Transactional Comment:

DOWNLOADS



The Downloads menu will allow you to download files provided by Administrators. Files are listed by category, accessible by the tabs at the bottom of the window.

To open a file, simply double click on the file name. Files will be opened by the corresponding application on your computer. (Example: Word files would open in MS Word, PDF Files will open in Adobe, etc.)