



User Guide

Version 4.0

Developed by



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Facultative Application Console 4.0 User Guide
Reinsurance Group of America, Inc.

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Introduction to FAC Console

This chapter includes an introduction to FAC Console, outlines the case flow through the systems, and lists system requirements for supporting the system.

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Introduction

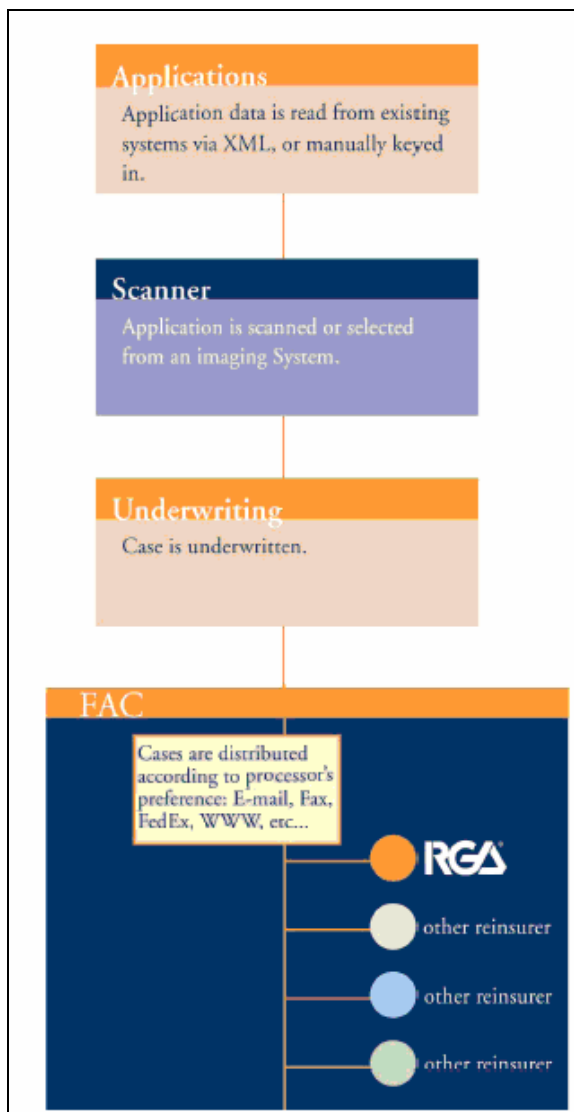
Facultative Application (FAC) Console enables you to enter facultative cases and submit them to multiple insurers quickly and easily. FAC Console not only improves the turnaround time for reinsurance offers, but it also provides case management and reporting capabilities.

Cases are scanned or imported from your imaging system into FAC Console. From this point, you can send cases to processors based upon the processor's preferred method of receiving cases. This includes e-mail, automated fax, or paper.

Case Flow

The following diagram illustrates case flow through FAC Console:

Figure 1. 1 – FAC Console Case Flow



System Requirements

The following hardware and software is needed to successfully run FAC Console:

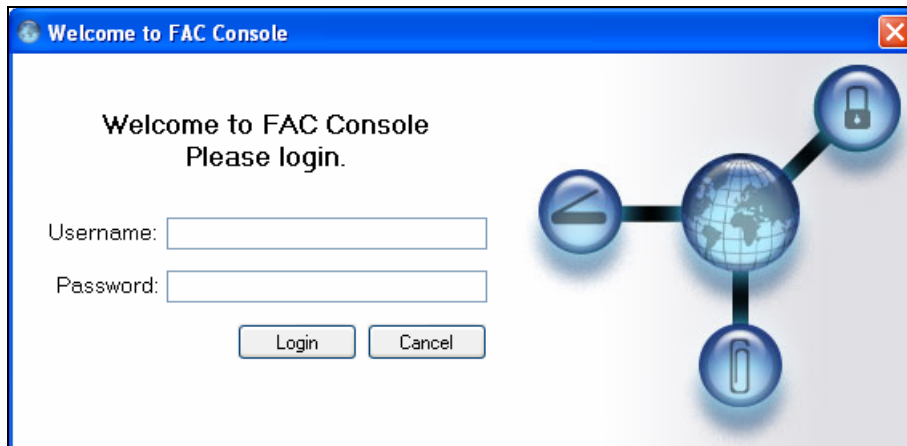
1. Desktop or laptop computer with:
 - a) Intel compatibility
 - b) 32 MB RAM
 - c) 2 MB hard disk free space
 - d) Microsoft Windows 95, 98, 2000, or NT 4.0
 - e) Microsoft Internet Explorer 5.0 or later
 - f) Microsoft Office 97 or newer
2. Printer for printing cases and reports
3. Twain compatible scanner capable of supporting TIF Group III, TIF Group IV, or PDF image types
4. Optional equipment:
 - a) SMTP compliant e-mail solution
 - b) Fax solution (stand-alone or network)
 - c) High speed Internet access

Log in to FAC Console

The following steps explain how to log in to FAC Console:

1. Open the FAC Console application. The Log In screen appears:

Figure 1. 2 – Log In



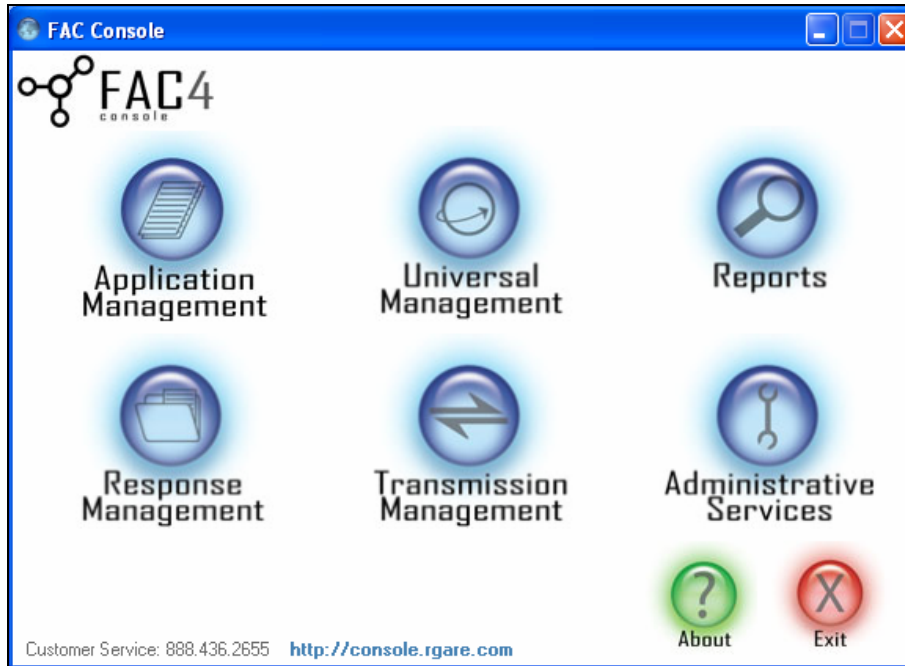
2. Enter your user name in the **Username** field.
3. Enter your password in the **Password** field.



User the following Username and Password for initial program setup:
Username: Administrator
Password: Test

4. Click **Login**. FAC Console opens:

Figure 1.3 – FAC Console Menu



Application Management

This chapter explains how to add new applications to FAC Console.

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**Note****Tip****Warning**

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Introduction and Objectives

Application Management enables you to add, edit, and view cases in FAC Console. It not only contains applications, but also reinsurer and ceding company contacts. By the end of this chapter, you will be able to:

1. Add a new application to FAC Console
2. Edit an existing application
3. Delete an existing application

Navigate to the Application Management Screen

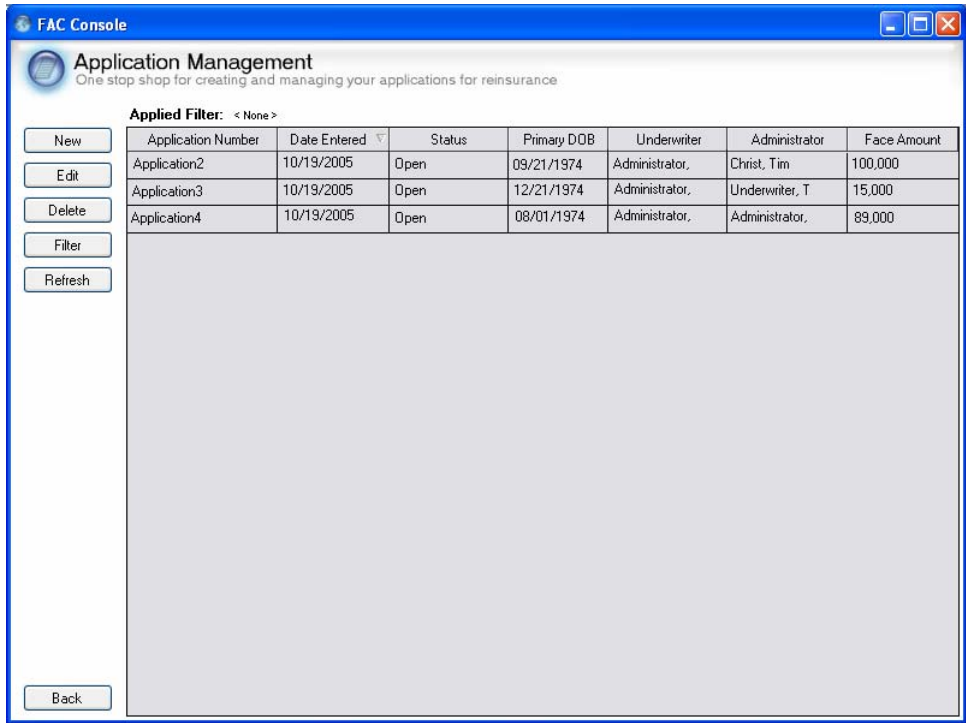
To open Application Management, click the Application Management button on the FAC Console Main Menu:

Figure 2. 1 – Application Management



The Application Management home screen opens:

Figure 2. 2 – Application Management



The Application Management screen contains the following areas:

1. Saved Applications
2. Function Buttons

Saved Applications

The Saved Applications grid displays all of the applications stored in FAC Console:

Figure 2. 3 – Saved Applications

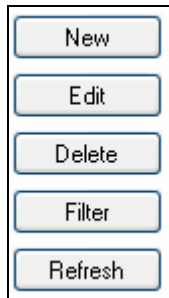
Application Number	Date Entered	Status	Primary DOB	Underwriter	Administrator	Face Amount
Application2	10/19/2005	Open	09/21/1974	Administrator,	Christ, Tim	100,000
Application3	10/19/2005	Open	12/21/1974	Administrator,	Underwriter, T	15,000
Application4	10/19/2005	Open	08/01/1974	Administrator,	Administrator,	89,000

Function Buttons

The function buttons on the Application Management home screen enable you to perform the following functions:

- **New** – add new applications to FAC Console
- **Edit** – change information on saved applications
- **Delete** – delete applications from the FAC database
- **Filter** - specify which applications you want to see on the Application Management home screen. You may view applications within a date range or by a specific application number.
- **Refresh** – view the most current listing of saved applications

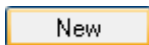
Figure 2. 4 – Function Buttons



Add a New Application

To begin the process of adding a new application to Application Management, click **New** on the Application Management home screen.

Figure 2. 5 – New



The New Application screen opens:

Figure 2. 6 – New Application

The following sections explain how to add new application information on the New Application screen.



FAC Console denotes required fields with an orange star ()*

Add General Information

Before you can save information on a new application, you must assign an application number and specify the currency used for this particular information:

Figure 2. 7 – General Information

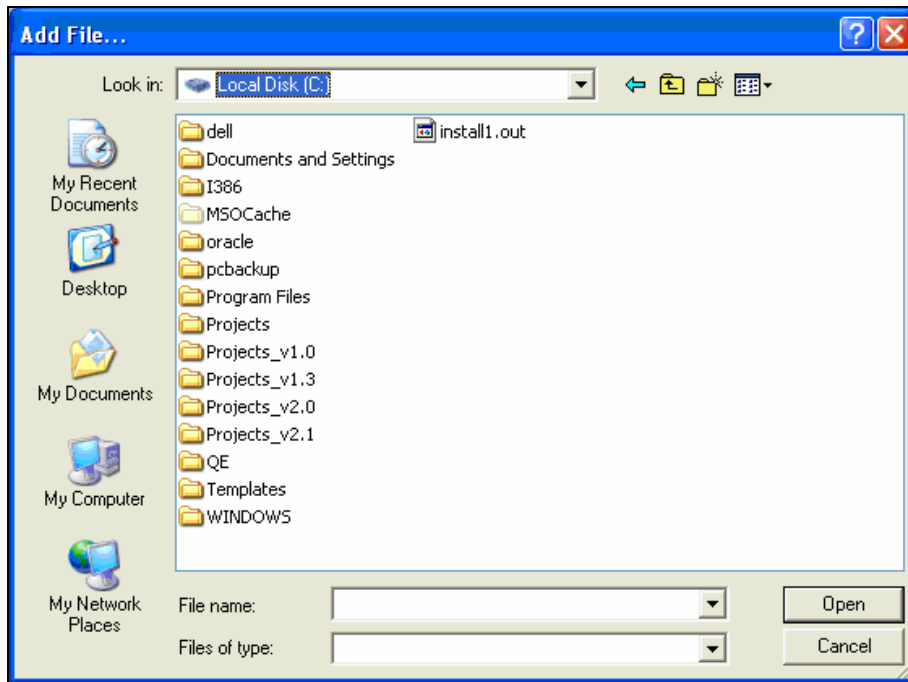
1. Enter an application number in the **Application Number** field. This number can be any combination of numbers and characters. Two applications can have the same application number.
2. Click the arrow in the **Status** field and select the status of the application. (You may customize the options included in the Status list in Administrative Services. See Chapter 6, “Administrative Services” for more information.)

Load an Image

FAC Console requires you to add images to the application. You cannot proceed in the application process without loading at least one image. To load an image:

1. Click the **Add Images** button. The Add File window opens:

Figure 2. 8 – Add File



2. Browse through your files to find the image that you want to add.
3. Click **Open**. The image appears in the Image Viewer and the file path appears in the Image Viewer Grid:

Figure 2. 9 – Image Viewer Grid

Images		
Path	File	Update
\\rgafiles-2\dfa	PICT0510.JPG	7/14/2006 2:27

4. Repeat steps 1 – 3 to add additional images.

Switch Image View

All images added to the application appear in the Image Viewer Grid. The first image that you added appears in the Image Viewer by default. To open another image in the Image Viewer, double-click the image path in the Image Viewer Grid.

Delete an Image

The following steps explain how to delete an image from the application:

1. Click the image path in the **Image Viewer Grid**
2. Click **Remove Image(s)**

Add New Application Information

You will need to enter information on three tabs in the Applicant Information area:

- Applicants
- Coverages
- Internal

Applicants Tab

The Applicants tab contains personal information regarding each individual included in the application.

Figure 2. 10 – Applicants

The screenshot shows the 'Applicants' tab in the application management interface. At the top, there are three tabs: 'Applicants', 'Coverages', and 'Internal'. Below the tabs are two buttons: 'Add Applicant' and 'Remove Applicant(s)'. The main area is titled 'Applicants' and contains a table with the following columns: Name, DOB, and Gender. Below the table, there are several input fields and dropdown menus for applicant information:

- Prefix: [Dropdown]
- First Name: [Text Field]
- Middle Name: [Text Field]
- Last Name: [Text Field] Primary
- Suffix: [Dropdown]
- Custom Number: [Text Field]
- Gender: [Dropdown]
- UserDefined2: [Text Field]
- Birth Country: [Dropdown] (UNITED ST)
- Birth State: [Dropdown]
- Residence Country: [Dropdown]
- Residence State: [Dropdown]
- National ID: [Text Field]
- Date of Birth: [Dropdown]
- Occupation: [Text Field]
- Tobacco Usage: [Dropdown]
- Impairments: [List Box]
 - Alcohol
 - Arthritis
 - Asthma
 - Blood Pressure

At the bottom of the form are two buttons: 'Ok' and 'Cancel'.

The following steps explain how to add information to the Applicants Tab:

1. Click the **Primary** checkbox if the applicant is the primary applicant. This checkbox is checked by default when you enter the first applicant on this tab.
2. Enter the following required information:
 - a) Enter the applicant's given name in the **First Name** field.
 - b) Enter the applicant's family name in the **Last Name** field.
 - c) Click the arrow in the **Gender** field and select the applicant's gender.
 - d) Click the arrow in the **Birth Country** field and select the applicant's country of birth.
 - e) Click the arrow in the **Birth State** field and select the applicant's state of birth.
 - f) Enter the applicant's date of birth in the **Date of Birth** field.



*Use the **arrow keys** on your keyboard to move between the month, date, and year fields. The **Tab** key will move your cursor to the next field, Occupation.*

- g) Click the arrow in the **Tobacco Usage** field and select the applicant's tobacco usage history.
3. Enter other information as it is known:
 - a) Middle Name
 - b) Suffix
 - c) Residence Country and State
 - d) National ID
 - e) Occupation
 - f) Impairments



You may define the custom number and UserDefined fields in the Administrative Services screen. See Chapter 6, "Administrative Services", for more information.

4. Click **OK**. The applicant appears in the Applicants grid:

Figure 2. 11 – Applicants Grid

Applicants		
Name	DOB	Gender
Banks, Cody	09/14/1970	Male

5. Click **Next**. The Coverages tab opens.

Add Multiple Applicants

The following steps explain how to add multiple applicants to the application:

1. Follow steps 1 – 4 in the previous section, “Applicants Tab”.
2. Click **Add Applicants**.
3. Add applicant information.
4. Click **OK**.
5. Repeat steps 1 – 4 as necessary to add additional applicants.
6. Click **Next** when you finish adding applicants.

Delete an Applicant

The following steps explain how to delete an applicant from the application:

1. Click the applicant that you want to delete in the Applicant Grid.
2. Click **Remove Applicant(s)**.

Switch Applicant View

Double-click the applicant in the Applicant Grid to display the applicant’s information on the Applicant Tab.

Coverages Tab

The Coverages tab enables you to enter specific insurance product information, such as the base product type and the amount of coverage.

Figure 2. 12 – Coverages

Coverage	Base	Amount	Table Rating
Accidental Death Benefit	No	0	
Automatic Premium Loan Pro	No	0	
Waiver of Mortality Deduction	No	0	
Waiver of Premium	Yes	0	

Coverage: Waiver of Premium

Amount: 0

Table Rating:

Assignments: Banks, Cody

Ok Cancel

The following steps explain how to add information to the Coverages tab:

1. Click **OK** to activate the upper portion of the Coverages tab.
2. Click the arrow in the **Base Product** field and select the base insurance product for this applicant. The Coverages grid populates with coverages associated with the base product.
3. Double-click the coverage in the Coverage grid for which you want to enter information. The lower portion of the Coverages tab becomes active.
4. Enter the amount of coverage in the **Coverage Amount** field.
5. Click the arrow in the **Table Rating** field and select the table rating for the applicant under this coverage.
6. Select the applicant assigned to this coverage in the **Assignments** area.

- Click **OK**. The information that you entered appears in the Coverages grid.



Click the **Previous** button to return to the Applicants tab if you need to change applicant information.

- Click **Next**. The Internal tab opens.

Internal Tab

The Internal Tab enables you to enter ceding company information, such as ceding company name, case administrator, and underwriter. You may also enter comments on this tab; however, they are not required.

Figure 2. 13 – Internal

The screenshot shows the 'Internal' tab selected in a three-tabbed interface (Applicants, Coverages, Internal). The 'Ceding Information' section contains three dropdown menus: 'Company' (selected: 'Your Company'), 'Case Administrator' (empty), and 'Underwriter' (selected: 'Administrator, System'). Below this is a large text area labeled 'Internal Comments:' which is currently empty.

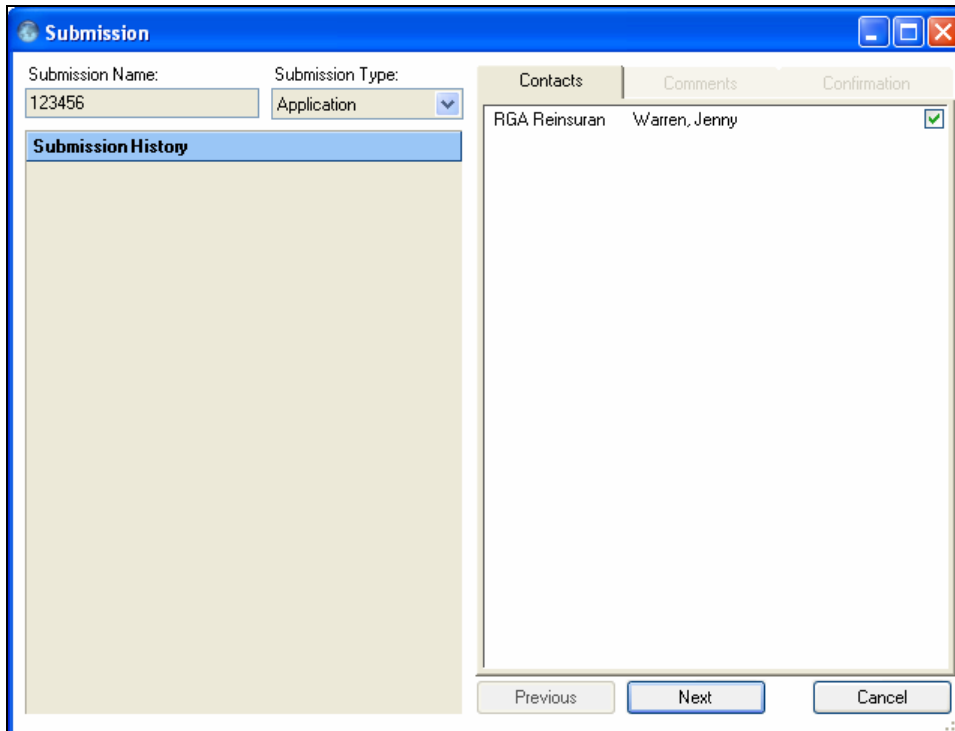
The following steps explain how to add information to the Internal tab:

1. Click the arrow in the **Company** field and select the ceding company.
2. Click the arrow in the **Case Administrator** field and select the case administrator for this case.
3. Click the arrow in the **Underwriter** field and select the underwriter on this application.
4. Click **Save & Submit** to save the application and begin the process of submitting it to the reinsurer. The Submission window opens.

Submit Application

The Submission window enables you to review the submission history of the application and choose the reinsurance contacts who will receive the application.

Figure 2. 14 – Submission



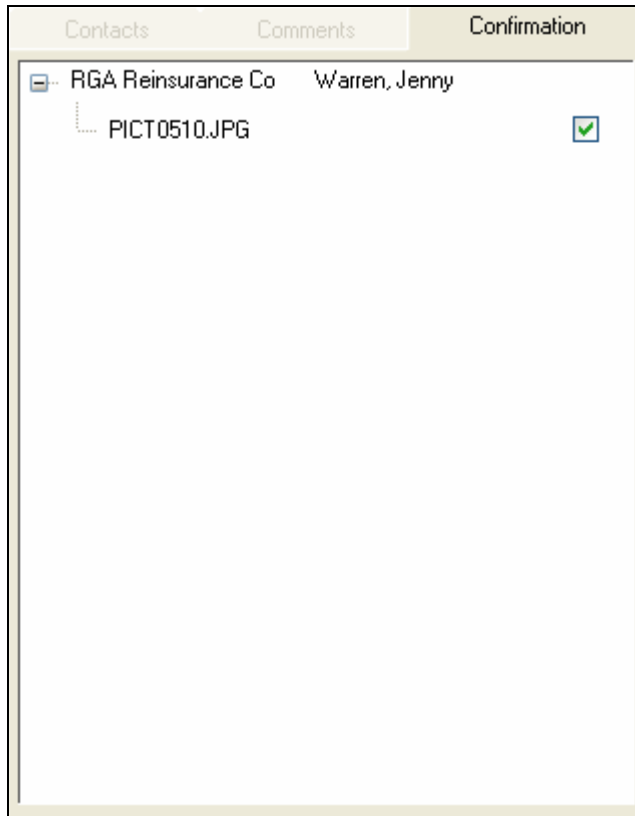
The following steps explain how to add or change information in the Submission window:

1. Click the checkboxes beside the reinsurance contacts that you want to receive the application on the **Contacts** tab.
2. Click **Next**. The Comments tab appears:

Figure 2. 15 – Comments

The screenshot shows a dialog box titled 'Comments' with three tabs: 'Contacts', 'Comments', and 'Confirmation'. The 'Comments' tab is active. It contains a 'Contact:' dropdown menu, a 'Comment:' text area, and 'Ok' and 'Cancel' buttons at the bottom.

3. Click the arrow in the **Contact** field and select a contact.
4. Enter comments in the **Comment** field. The system will only send comments to the selected contact.
5. Click **OK** to save the comment.
6. Click **Next**. The Confirmation tab appears:

Figure 2. 16 – Confirmation

7. Review the information on the **Confirmation** tab. The Confirmation tab displays the contacts chosen in step 3 along with files that FAC Console will transmit.



The system will only send files that are checked. De-select any file that you do not want to send to the contact.

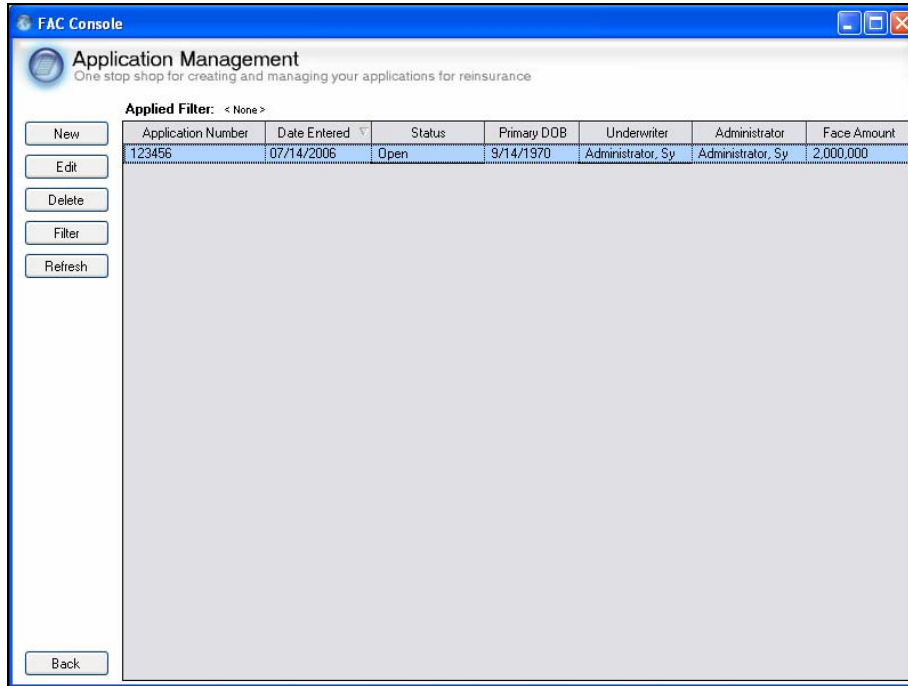
8. Click **Transmit**. The Submit window closes and the Application Management home screen re-appears. FAC Console sends the application to the Sender Service. This service sends the application to the selected reinsurance contacts.

Edit an Application

The following steps explain how to edit an application:

1. Select the application that you want to edit on the Application Management home screen:

Figure 2. 17 – Application Management



2. Click **Edit**. The application opens:

Figure 2. 18 – Application

Application Number: 123456 Status: Open

Name	DOB	Gender
Banks, Cody	09/14/1970	Male

Path	File	Update
\\vgafiles-2\dfa	PICT0510.JPG	7/14/2006 3:16

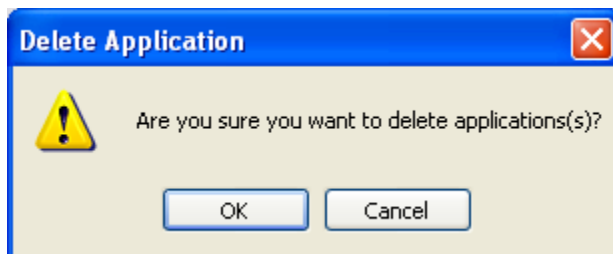
3. Edit the application as necessary.
4. Click **Save & Submit** on the Internal tab.
5. Follow the steps in “Submit Application” on page 2-13 to re-submit the application.

Delete an Application

The following steps explain how to delete an application from Application Management:

1. Select the application that you want to delete on the Application Management home screen.
2. Click **Delete**. The following confirmation window appears:

Figure 2. 19 – Delete Application



3. Click **OK**. The application is deleted from Application Management.

Universal Management

This chapter explains how to add, edit, and delete transactions using the Universal Management screen.

ICON KEY

**Note****Tip****Warning**

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Introduction and Objectives

Universal Management enables you to add, edit, and view transactions in FAC Console. Transactions can represent any category of business information that you want to capture. Transaction types are defined using the Administrative Services screen. See Chapter 6, “Administrative Services” for more information.

By the end of this chapter, you will be able to:

1. Add a new transaction to FAC Console
2. Edit an existing transaction
3. Delete an existing transaction

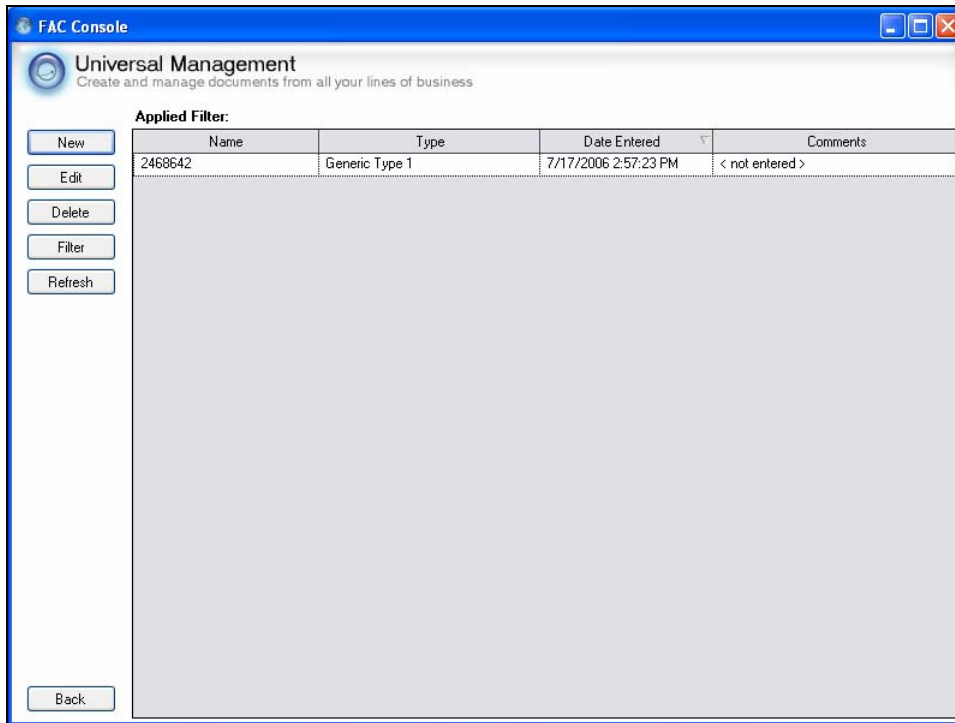
Open Universal Management

To open Universal Management, click the Universal Management button on the FAC Console Main Menu:

Figure 3. 1 – FAC Console Main Menu



The Universal Management home screen opens:

Figure 3. 2 – Universal Management

The Application Management screen contains the following areas:

1. Saved Universal Transactions
2. Function Buttons

Saved Universal Transactions

The Saved Universal Transaction grid displays all of the transactions stored in FAC Console:

Figure 3. 3 – Saved Universal Transactions

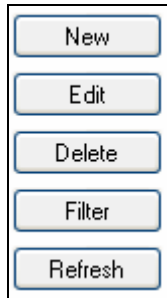
Name	Type	Date Entered	Comments
2468642	Generic Type 1	7/17/2006 2:57:23 PM	< not entered >

Function Buttons

The function buttons on the Universal Management home screen enable you to perform the following functions:

- **New** – add new transactions to FAC Console
- **Edit** – change information on saved transactions
- **Delete** – delete transactions from the FAC database
- **Filter** - specify which transactions you want to see on the Universal Management home screen. You may view applications within a date range or by a specific application number.
- **Refresh** – view the most current listing of saved transactions

Figure 3. 4– Function Buttons



Add a New Transaction

To begin the process of adding a new transaction, click **New** on the Universal Management home screen.

Figure 3. 1 –New



The New Transaction screen opens:

Figure 3. 5 – New Transaction



FAC Console denotes required fields with an orange star ()*

Add General Information

Before you can save information on a new transaction, you must name the transaction and specify the transaction type:

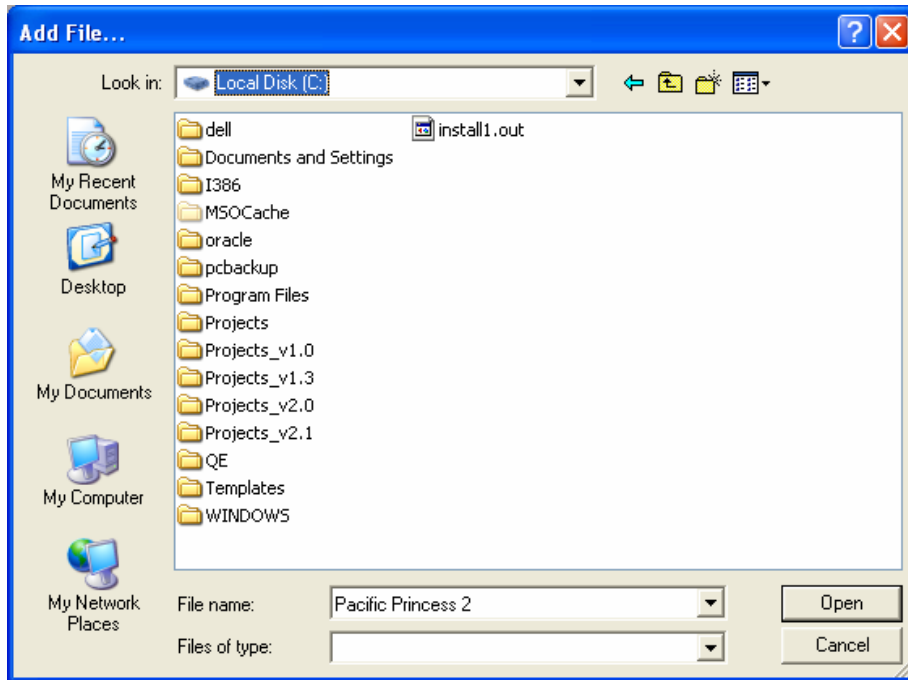
1. Enter the transaction name in the **Name** field.
2. Click the arrow in the **Type** field and select the transaction type. (Transaction types are defined in Administrative Services. See Chapter 6, “Administrative Services” for more information.)

Load an Image

FAC Console requires you to add images to the transaction. You cannot proceed in the new transaction process without loading at least one image. To load an image:

1. Click the **Add Images** button. The Add File window opens:

Figure 3.6 – Add File



2. Browse through your files to find the image that you want to add.
3. Click **Open**. The image appears in the Image Viewer and the file path appears in the Image Viewer Grid:

Figure 3.7 – Image Viewer Grid

Images		
Path	File	Update
\\rgafiles-2\dfa	PICT0510.JPG	7/14/2006 2:27

4. Repeat steps 1 – 3 to add additional images.

Switch Image View

All images added to the transaction appear in the Image Viewer Grid. The first image that you added appears in the Image Viewer by default. To open another image in the Image Viewer, double-click the image path in the Image Viewer Grid.

Delete an Image

The following steps explain how to delete an image from the transaction:

1. Click the image path in the **Image Viewer Grid**
2. Click **Remove Image(s)**

Add New Transaction Information

You will need to enter information on two tabs in the Transaction Information area:

- Information
- Internal

Information Tab

The Applicants tab contains fields defined for the transaction type. These fields will differ depending upon the transaction. The following steps explain how to add information to the Information Tab:

1. Add information in the Information tab fields as it applies to the transaction type.
2. Click **Next**. The Internal tab opens.

Internal Tab

The Internal Tab enables you to enter ceding company information and comments.

Figure 3. 8 – Internal

The screenshot shows a software interface with two tabs: 'Information' and 'Internal'. The 'Internal' tab is selected. Under the 'Internal' tab, there is a section titled 'Ceding Information' which contains two dropdown menus. The first dropdown is labeled 'Company' and has 'Your Company' selected. The second dropdown is labeled 'Ceding Contact' and has 'Administrator, System' selected. Below the 'Ceding Information' section is a large text area labeled 'Comments:'. At the bottom of the form are four buttons: 'Previous', 'Save & Submit', 'Save & Close', and 'Cancel'.

The following steps explain how to add information to the Internal tab:

1. Click the arrow in the **Company** field and select the ceding company.
2. Click the arrow in the **Ceding Contact** field and select the ceding company contact for this transaction.
3. Enter comments in the **Comments** field.
4. Click **Save & Submit** to save the transaction. The Submission window opens.

Submit Transaction

The Submission window enables you to review the submission history of the transaction and choose the reinsurance contacts who will receive the transaction.

Figure 3.9 – Submission

The screenshot shows a window titled "Submission" with a blue title bar. At the top, there are two input fields: "Submission Name:" containing "2468642" and "Submission Type:" with a dropdown menu set to "Generic Type 1". Below these is a "Submission History" section, which is currently empty. To the right, there are three tabs: "Contacts", "Comments", and "Confirmation". The "Contacts" tab is active, displaying a list of contacts with checkboxes. One contact, "RGA Reinsuran Parkinson, Dean", is visible with its checkbox checked. At the bottom of the window, there are three buttons: "Previous", "Next", and "Cancel".

The following steps explain how to add or change information in the Submission window:

1. Click the checkboxes beside the reinsurance contacts that you want to receive the application on the **Contacts** tab.
2. Click **Next**. The Comments tab appears:

Figure 3. 10 – Comments

The screenshot shows a software window with three tabs: 'Contacts', 'Comments', and 'Confirmation'. The 'Comments' tab is active. It contains a 'Contact:' label above a dropdown menu. Below that is a 'Comment:' label above a large text area. At the bottom of the main window are 'Ok' and 'Cancel' buttons. Below the entire window are three navigation buttons: 'Previous', 'Next', and 'Cancel'.

3. Click the arrow in the **Contact** field and select a contact.
4. Enter comments in the **Comments** field.
5. Click **OK**.
6. Repeat steps 3 and 4 to select another contact and add a comment
7. Click **Next**. The Confirmation tab appears:

Figure 3. 11 - Confirmation

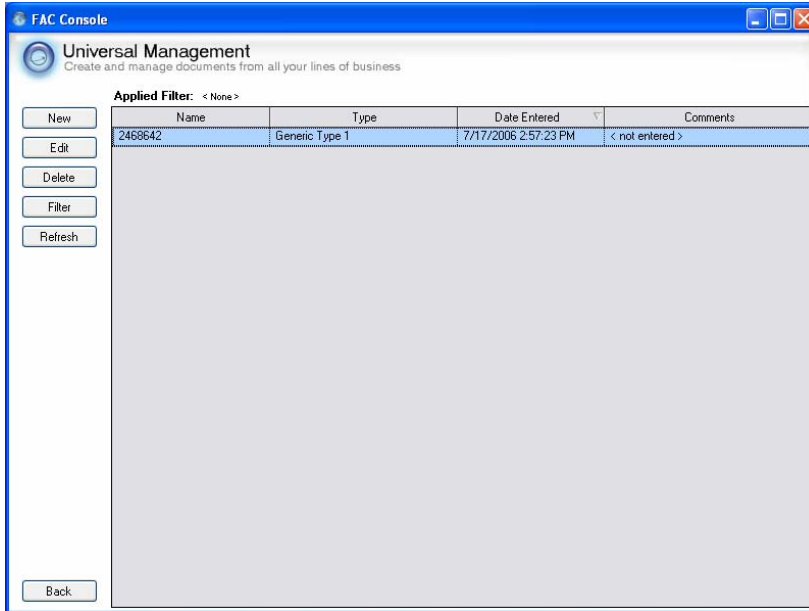
8. Review the information on the Confirmation tab.
9. Click **Transmit**. The Submit window closes and the Universal Management home screen re-appears. FAC Console sends the transaction to the Sender Service. This service sends the transaction to the selected reinsurance contacts.

Edit a Transaction

The following steps explain how to edit a transaction:

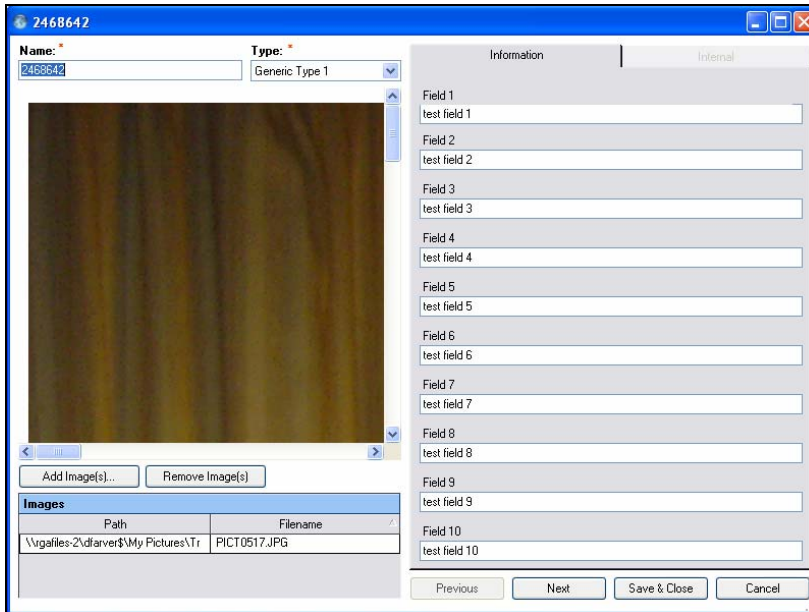
1. Select the transaction that you want to edit on the Universal Management home screen:

Figure 3. 12 – Universal Management



2. Click **Edit**. The transaction opens:

Figure 3. 13 – Transaction



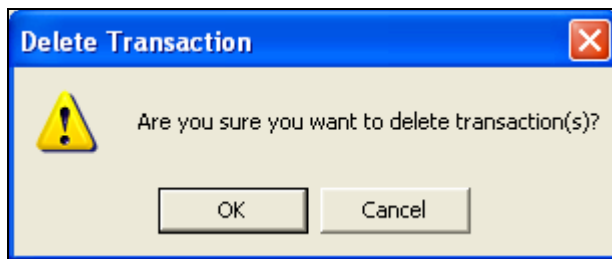
3. Edit the transaction as necessary.
4. Click **Save & Submit**.
5. Follow the steps in “Submit Transaction” on page 3-10 to re-submit the transaction.

Delete a Transaction

The following steps explain how to delete a transaction from Universal Management:

1. Select the transaction that you want to delete on the Universal Management home screen.
2. Click **Delete**. The following confirmation window appears:

Figure 3. 14 – Delete Transaction



3. Click **OK**. The transaction is deleted from Universal Management.

Transmission Manager

This chapter explains how to resend transmissions using the Transmission Manager.

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Introduction and Objectives

Transmission Manager lists all applications and transactions submitted to reinsurers using FAC Console.

By the end of this chapter, you will know how to:

1. Navigate to the Transmission Manager screen
2. Resend selected transmissions
3. Resend failed transmissions

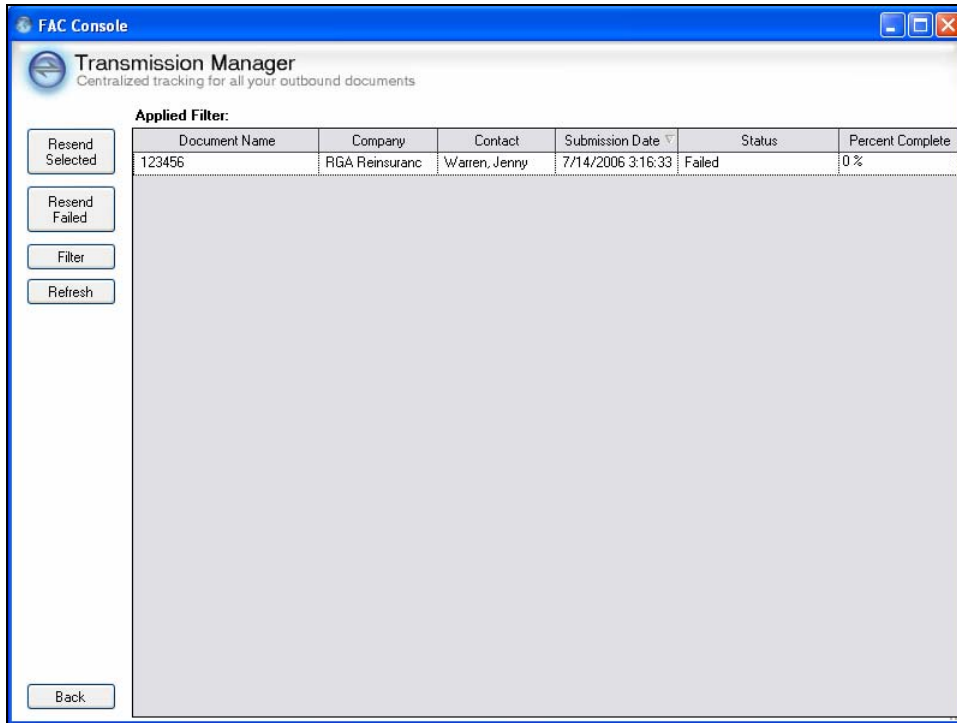
Transmission Manager

To open the Transmission Manager screen, click the Transmission Management button on the FAC Console Main Menu.

Figure 4. 1 – Transmission Management



Figure 4. 2 – Transmission Manager



The Transmission Manager screen contains the following areas:

1. Transmissions
2. Function Buttons

Transmissions

The Transmissions grid displays all of the applications and transactions submitted in FAC Console:

Figure 4. 3 – Transmissions

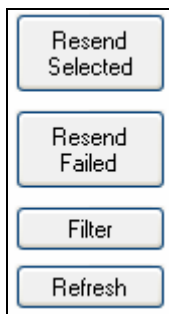
Document Name	Company	Contact	Submission Date	Status	Percent Complete
2468642	RGA Reinsurance	Parkinson, Dean	7/18/2006 10:18:4	Queued	0 %
123456	RGA Reinsurance	Warren, Jenny	7/14/2006 3:16:33	Failed	0 %

Function Buttons

The function buttons on the Application Management home screen enable you to perform the following functions:

- **Resend Select** – re-submit a transmission
- **Resend Failed** – re-submit a failed transmission
- **Filter** - specify which applications you want to see on the Application Management home screen. You may view applications within a date range or by a specific application number.
- **Refresh** – view the most current listing of saved applications

Figure 4. 4 – Buttons



Resend Selected Transmissions

The following steps explain how to resend a selected transmission:

1. Click the transmission on the Transmission list that you want to resend.
2. Click **Resend Selected**

Resend All Failed Transmissions

The following steps explain how to resend a transmission whose status is “Failed”:

1. Click the transmission on the Transmission list that you want to resend.
2. Click **Resend Failed**

Response Management

This chapter explains how to edit responses using Response Management.

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Introduction and Objectives

Response Management enables you to track the status of all application submitted to a reinsurer.

By the end of this chapter, you will know how to:

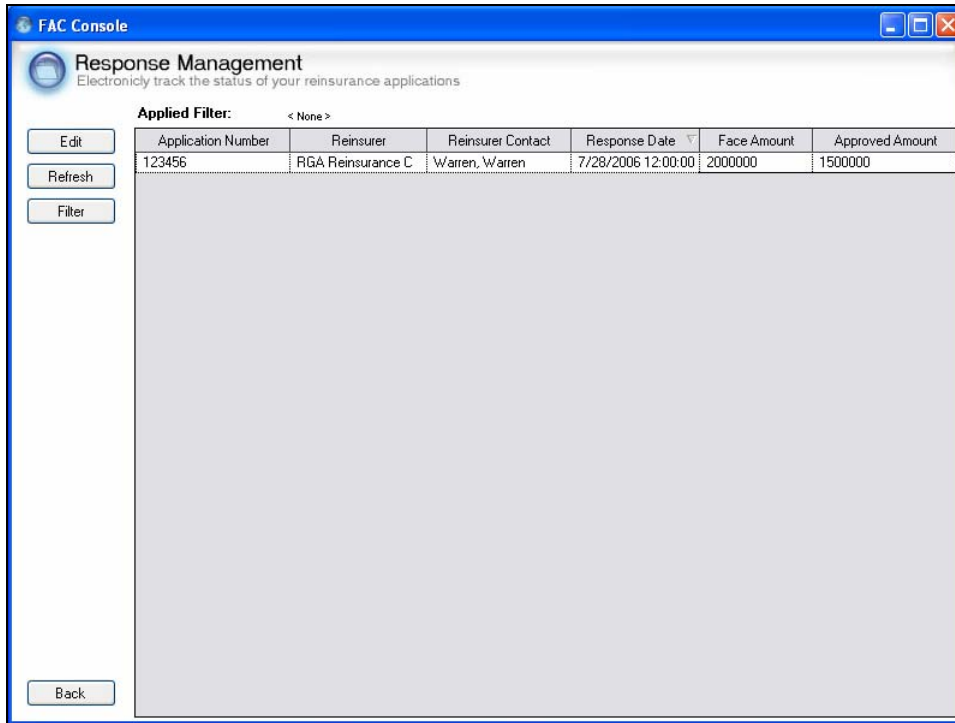
1. Navigate to the Response Management screen
2. View application response
3. Edit an application response

Response Management

To open the Response Management screen, click the Response Management button on the FAC Console Main Menu.

Figure 5. 1 – FAC Console Main Menu



Figure 5. 2 – Response Management

The Response Management screen contains the following areas:

1. Responses
2. Function Buttons

Responses

The Responses grid displays all of the applications and transactions submitted in FAC Console:

Figure 5. 3 – Responses

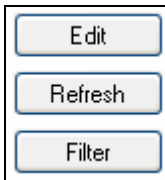
Application Number	Reinsurer	Reinsurer Contact	Response Date	Face Amount	Approved Amount
123456	RGA Reinsurance C	Warren, Warren	7/28/2006 12:00:00	2000000	1500000

Function Buttons

The function buttons on the Response Management home screen enable you to perform the following functions:

- **Edit** – view and change information on applications
- **Refresh** – view the most current listing of saved applications
- **Filter** - specify which responses you want to see on the Response Management home screen. You may view responses within a date range or by a specific application number.

Figure 5. 4 – Buttons



Edit Responses

The following steps explain how to edit a selected response:

1. Click the response on the Responses grid that you want to edit
2. Click **Edit**. The Application Response screen opens:

Figure 5. 5 – Application Response

 A screenshot of a web application window titled 'Application Response'. The window contains the following elements:

- Application Number:** 123456
- Submission Date:** 7/14/2006 3:16:33 PM
- Reinsurer:** RGA Reinsurance Company
- Reinsurer Contact:** Warren, Jenny
- Response Date:** 7/28/2006 (with a dropdown arrow)
- Comments:** A large text input area.
- Buttons:** 'Update Above' and 'Cancel' below the comments field.
- Coverages Table:**

Rider	Reinsurer Status	Approved Amount	Placed Amount	InitialRate	FinalRate
Accidental	Pending Issue	1000000	750000		
Waiver of Pr	Pending Issue	500000	500000		
- Input Fields:**
 - Status: [dropdown]
 - Approved Amt: [text input]
 - Initial Rate: [text input]
 - Rider: [dropdown]
 - Placed Amt: [text input]
 - Final Rate: [text input]
 - Custom: [text input]
 - Custom Text: [text input]
- Buttons:** 'Cancel' and 'Save' at the bottom right, and 'Back' at the bottom left.

3. Click the arrow in the **Response Date** field to select a date.
4. Enter comments in the **Comments** field.

5. Double-click a coverage in the **Coverages** grid to edit its information. The fields at the bottom of the screen become enabled:

Figure 5.6 - Coverages

Coverages					
Rider	Reinsurer Status	Approved Amount	Placed Amount	InitialRate	FinalRate
Accidental	Pending Issue	1000000	750000		
Waiver of Pr	Pending Issue	500000	500000		

Status:	<input type="text" value="Pending Issue"/>	Approved Amt:	<input type="text" value="500000"/>	Initial Rate:	<input type="text"/>
Rider:	<input type="text" value="Waiver of Premium"/>	Placed Amt:	<input type="text" value="500000"/>	Final Rate:	<input type="text"/>
Custom:	<input type="text"/>	Custom Text:	<input type="text"/>	<input type="button" value="Cancel"/>	<input type="button" value="Save"/>

6. Edit information as necessary.
7. Click **Save**.
8. Click **Back** to return to the Response Management screen.

Reports

This chapter explains how to navigate to the Reports screen and run a report.

ICON KEY

**Note****Tip****Warning**

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Introduction and Objectives

The Reports screen contains standard reports that you can use for application management. By the end of this chapter, you will be able to:

1. Navigate to the Reports screen
2. Run a report
3. Identify the major areas of the Application Report screen

Navigate to the Reports Screen

To open the reports screen, click the Reports button on the FAC Console Main Menu:

Figure 6. 1 – Reports Button



The Reports screen opens:

Figure 6. 2 – Reports Screen

1) Select Document Type

2) Select Report

3) Select Criterion

By Date:

From: 04/21/2006

To: 07/20/2006

By Status:

Open

Incomplete

Closed

Request for Capacity

By Processor:

By Ceding Contact:

View Report

Back

The Reports screen contains three distinct areas:

- Select Document Type
- Select Report
- Select Criterion

Select Document Type

The Select Document Type area enable you to select the type of document that you want to include on a report.

Figure 6. 3 - Select Document Type

1) Select Document Type

Application

Application

Generic Type 1

Select Reports

The Select Reports area enables you to select the reports that you want to run.

Figure 6. 4 – Select Reports

2) Select Report

Case Count By Reinsurer

Face Amount By Reinsurer

Transmission Count By Reinsurer

Select Criterion

The Select Criterion area enables you to select the criteria for your report. Reports will display information based on this criteria.

Figure 6. 5 – Select Criterion

3) Select Criterion

By Date:
 From: 04/21/2006
 To: 07/20/2006

By Status:
 Open
 Incomplete
 Closed
 Request for Capacity

By Processor:

By Ceding Contact:

View Report Button

The View Report button executes reports that you selected.

Figure 6. 6 – View Reports

View Report

Run a Report

The following steps explain how to run a report:

1. Select the document type:
 - a) Click the arrow in the Select Document Type field. A list of document types opens.
 - b) Click the document type that you want to include on the report.
2. Select the report type:
 - a) Click the arrow in the Select Report field. A list of available reports opens.
 - b) Click the report type that you want to run.
3. Select the criteria for the report:



All fields in the Criterion section are optional. You may run a report without specifying any criteria. Any criterion that you select appears as a filter on the report.

- a) Specify a date range for the report in the **By Date** fields:
 - i) Enter the earliest date that you want to include in the date range in the **From** field.
 - ii) Enter the last date that you want to include in the date range in the **To** field.
 - b) Click checkboxes in the **By Status** area to indicate that applications only of a certain status will appear on the report. You may choose more than one status.
 - c) Click the arrow in the **By Processor** field and select a reinsurer. Applications only from this reinsurer will appear on the report.
 - d) Click the arrow in the **By Ceding Contact** field and select a ceding company contact. Only applications associated with this ceding contact will appear on the report.
4. Click **View Report**. The report opens on your screen.

Report Screen

The report screen contains the following elements:

- Toolbar
- Tree

Toolbar













Each report contains a toolbar:

Figure 6. 7 – Application Report Toolbar



The following table lists the function of each icon on the Application Report toolbar:

Table 6. 1 – Toolbar Icon Functions

Icon	Function
	Export report to a file on your computer
	Print report
	Refresh report information
	Toggle tree on and off
	Go to first page of report
	Go to previous page
	Go to next page
	Go to last page of report
	Go to a specific page in the report
	Close current view
	Search for text
	Zoom report view

Tree

Reports with information for multiple reinsurers contain a tree:

Figure 6. 8 – Tree



The tree displays each reinsurer whose information appears on the report. You may click the branches on the tree to go to the corresponding reinsurer's information on the report.

Administrative Services

This chapter explains how to perform various administrative tasks using the Administrative Services screen.

ICON KEY

**Note****Tip****Warning**

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Introduction and Objectives

Administrative Services enables users to perform administrative tasks such as creating system settings, adding new users, and adding ceding and reinsurance company information. Only users with administrative privileges may access Administrative Services.

By the end of this chapter, you will be able to:

1. Create a new ceding company
2. Create user groups
3. Create logins and passwords for new users
4. Add reinsurance companies and contacts to FAC Console
5. Define reinsurance company processing channels
6. Add riders and rider options
7. Add products and product contacts
8. Create new screens for Universal Management

Navigate to the Administrative Services Screen

To open Administrative Services click the Administrative Services button on the FAC Console Main Menu:

Figure 7.1 – FAC Console Main Menu



The Administrative Services home screen opens:

Figure 7.2 – Administrative Services

FAC Console
Administrative Services
Complete configuration management to unleash the power of FAC Console

Rider Product Product Rider Product Contact Universal Custom Label Log
User Company User Group User Management Processor Processor Contact Send Channel Response Channel Lookup Editor

Select a Company:

Name: *
Address 1:
Address 2:
City:
Zip Code:
Country:
State:
Report Email:
MIB:
Identity: *

Help
In this section, you add your company's information.
If you broker more than one company you can enter in more than one. You will be able to select which company you are brokering for when you enter in the application or universal.
Tip 1:
For the Identity field, please coordinate with RGA during initial setup. It is a unique identifier for your company(s) and will aid the reinsurers or destination to figure out who the transmission is coming from.
Tip 2:
The 'Report Email' field is for specifying the email address that is used for the nightly case count by reinsurer report. If it is not filled out, no email will be sent. It is optional.

User Company

The User Company tab enables you to add your company's information to FAC Console, as well as any other companies with which you do business. You may also edit existing company information and delete existing companies using the User Company tab.

Add a New Company

The following steps explain how to add a new company using the User Company tab:

1. Click the **Add** button. All fields on the User Company tab become active.
2. Enter the company's name in the **Name** field.
3. Enter the company's address in the following fields:
 - a) **Address 1**
 - b) **Address 2**
 - c) **City**
 - d) **Zip Code**
 - e) **Country**
 - f) **State**
4. Enter the e-mail address at which the company receives reports in the **Report E-Mail Address** field.
5. Enter the Medical Information Bureau (MIB) that the company uses in the **MIB** field.
6. Enter the ceding company's identity number in the **Identity** field.



You will need to call RGA to obtain an identity number for a ceding company.

7. Click **Save**.

Edit a User Company's Information

The following steps explain how to edit an existing company's information:

1. Click the arrow in the **Select a Company** field.
2. Click the ceding company that you want to edit. All fields on the User Company tab become active.
3. Edit information as necessary.
4. Click **Save**.

Delete a User Company

The following steps explain how to delete a company from FAC Console:

1. Click the arrow in the **Select a Company** field.
2. Click the company that you want to delete.
3. Click **Delete**.

User Groups

The User Groups tab enables you to add new user groups and define their roles. You may also edit and delete existing user groups.

Figure 7.3 – User Groups

The screenshot shows the 'Administrative Services' window in the FAC Console. The 'User Group' tab is selected. At the top, there is a navigation bar with tabs for 'Rider', 'Product', 'Product Rider', 'Product Contact', 'Universal', 'Custom Label', and 'Log'. Below this, a secondary navigation bar includes 'User Company', 'User Group', 'User Management', 'Processor', 'Processor Contact', 'Send Channel', 'Response Channel', and 'Lookup Editor'. The main content area features a 'Select a User Group:' dropdown menu with an 'Add' button. Below this is a form with a 'Name:' text field and a 'Roles:' section containing a list of roles with checkboxes: Application Management Administrator, Application Management User, Response Management Administrator, Response Management User, Universal Management Administrator, Universal Management User, Transmission Manager User, Reports User, and Administrative Services User. At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons. A 'Back' button is located at the bottom left. On the right side, there is a 'Help' section with text explaining that groups have one or more roles and that default groups have been provided as a guide.

Add a User Group

The following steps explain how to add a new user group:

1. Click **Add**. All fields on the User Group tab become active.
2. Enter the name of the new group in the **Name** field.
3. Click the checkboxes beside the **Roles** that you want to assign to this group.
4. Click **Save**.

Edit a User Group

The following steps explain how to edit an existing user group's information:

1. Select the group whose information you want to edit:
 - a) Click the arrow in the **Select a User Group** field.
 - b) Click the group that you want to edit. All fields on the Group tab become active.
2. Edit information as necessary.
3. Click **Save**.

Delete a User Group

The following steps explain how to delete a user group from FAC Console:

1. Click the arrow in the **Select a Group** field.
2. Click the group that you want to delete.
3. Click **Delete**.

User Management

The User Management tab enables you to add new users to FAC Console. You may also edit existing user information and delete users with this tab.

Figure 7.4 – User Management

The screenshot shows the 'User Management' tab in the FAC Console. The 'Authentication Type' is set to 'Database'. The 'Users' table contains one entry: 'Administrator' with a checkmark in the 'Disabled' column. The 'Help' section explains that the 'Authentication Type' selection determines the method of authentication and that the highest privilege is used when setting user groups. The bottom section contains input fields for user details and a 'Disabled' checkbox.

Username	Full Name	Last Login Date	Disabled
Administrator	Administrator, System		<input checked="" type="checkbox"/>

The Users grid displays all users currently in FAC Console. A checkmark in the Disabled column indicates that a user is inactive.

Add a New User

The following steps explain how to add a new user to FAC Console:

1. Select the type of authentication you will use for the new user:
 - a) Click the **Database** radio button to require users to log in manually to the system. You must set up user passwords manually for database authentication.
 - b) Click the **Active Directory** radio button to enable users to automatically log in to FAC Console with the same account that they use to log in to their computers. Active Directory authentication imports users from the active directory.
2. Click **Add**. The fields at the bottom of the User Management tab become active.
3. Enter the user's log in name in the **Username** field.
4. Enter the user's password in the **Password** field.
5. Re-enter the user's password in the **Confirm Password** field.
6. Enter user information in the following fields:
 - a) **First Name**
 - b) **Last Name**
 - c) **Email Address**
 - d) **Phone**
 - e) **Fax**
7. Select the user's companies in the **User Company(s)** field.
8. Click the arrow in the **Default Company** field and select the user's default company.
9. Select the groups to which the user belongs in the User **Groups** area.
10. Select the user's company in the **Company** area.
11. Click **Save**. The user's information appears in the **Users** grid.

Edit a User's Information

The following steps explain how to edit an existing user's information:

1. Double-click the user that you want to edit in the **Users** grid.
2. Edit information as necessary
3. Click **Save**.



Click the Disabled checkbox to inactivate a user.

Delete a User

The following steps explain how to delete a user from FAC Console:

1. Double-click the user that you want to delete in the **Users** grid.
2. Click **Delete**.

Processor

The Processor tab enables you to add reinsurance companies to FAC Console. You may also edit existing reinsurer information and delete reinsurers with this tab.

Figure 7.5 – Processor

The screenshot shows the FAC Console interface for the Processor tab. The window title is "FAC Console" and the header is "Administrative Services". The "Processor" tab is selected. The interface includes a table with columns "ProcessorName", "Phone", and "Fax", containing one entry: "RGA Reinsurance Compan". Below the table are input fields for "Name", "City", "Address 1", "Address 2", "Zip Code", "Phone", and "Fax". There are also dropdown menus for "Country" and "State", and checkboxes for "Allow Send Table Rating/Impairments" and "Version 3 Compatibility". A "Help" section on the right provides instructions and tips. At the bottom, there are "Delete", "Cancel", and "Save" buttons, and a "Back" button at the very bottom left.

Add a Processor

The following steps explain how to add a new processor to FAC Console:

1. Click **Add**. The fields in the lower portion of the Processor tab become active.
2. Enter the processor company name in the **Processor Name** field.
3. Enter the processor's contact information in the following fields:
 - a) **Address 1**
 - b) **Address 2**
 - c) **Zip Code**
 - d) **Phone**
 - e) **Fax**

- f) **City**
 - g) **Country**
 - h) **State**
4. Click the **Allow Send Table Rating/Impairments** checkbox if you will send table ratings and impairments electronically to the reinsurer.
 5. Click **Version 3 Compatibility** if the reinsurer does not support the version 4 XML specification. The system will send XML compatible with the previous version of FAC Console.
 6. Click **Save**. The new processor appears in the Processor grid.

Edit a Processor's Information

The following steps explain how to edit an existing processor's information:

1. Double-click the processor that you want to edit in the **Processors** grid.
2. Edit information as necessary
3. Click **Save**.

Delete a Processor

The following steps explain how to delete a processor from FAC Console:

1. Double-click the processor that you want to delete in the **Processors** grid.
2. Click **Delete**.

Processor Contact

The Processor Contact tab enables you to add, edit, and delete contacts for each reinsurer in FAC Console.

Figure 7.6 – Processor Contact

The screenshot shows the 'Processor Contact' tab in the FAC Console. The interface includes a breadcrumb trail, a 'Select a Contact' dropdown with an 'Add' button, and several input fields: 'Processor' (dropdown), 'First Name', 'Last Name', 'Email', and 'Document Type' (dropdown). There are also checkboxes for 'Disabled' and 'Send Daily Reports'. At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons. A 'Back' button is located at the bottom left. A 'Help' section on the right provides instructions and tips for using the contact management features.

Add a Processor Contact

The following steps explain how to add a new processor contact to FAC Console:

1. Click **Add**. All fields on the Processor Contact tab become active.
2. Click the arrow in the **Processor** field and select the company for whom you are adding the contact.
3. Enter the contact's given name in the **First Name** field.
4. Enter the contact's family name in the **Last Name** field.
5. Enter the contact's e-mail address in the **E-Mail** field.
6. Click the arrow in the **Document Type** field and select the type of document that the contact will receive.
7. Click the **Send Daily Reports** field if you want the contact to receive daily reports.
8. Click **Save**.

Edit a Processor Contact's Information

The following steps explain how to edit an existing processor's information:

1. Click the arrow in the **Contact Name** field.
2. Click the contact that you want to edit. All fields on the Processor Contact tab become active.
3. Edit information as necessary.
4. Click **Save**.

Delete a Processor Contact

The following steps explain how to delete a processor from FAC Console:

1. Click the arrow in the **Contact Name** field.
2. Click the contact that you want to delete.
3. Click **Delete**.

Send Channel

The Send Channel tab allows you to set up destinations, or channels, for sending and receiving application and transaction transmissions. You may specify multiple destinations that can be used as backup destinations in case transmissions to the first destination fail.

Figure 7.7 – Send Channel

The screenshot displays the 'Send Channel' configuration page in the FAC Console. At the top, there's a navigation bar with tabs for 'Rider', 'Product', 'Product Rider', 'Product Contact', 'Universal', 'Custom Label', and 'Log'. Below this, a sub-navigation bar includes 'User Company', 'User Group', 'User Management', 'Processor', 'Processor Contact', 'Send Channel', 'Response Channel', and 'Lookup Editor'. The 'Send Channel' tab is active.

The main content area features a 'Select a Processor' dropdown menu and an 'Add' button. Below this is a table titled 'Send Channels' with columns for 'Destination', 'Channel Type', and 'Preferred'. To the right of the table are 'Up' and 'Down' buttons for reordering. Below the table are several input fields: 'Channel Type' (dropdown), 'Destination Address', 'Username', 'Password', 'Password Confirmation', and 'Certificate Path' (with a 'Browse...' button). At the bottom of the form are 'Delete', 'Cancel', and 'Save' buttons. A 'Back' button is located at the bottom left.

A 'Help' section on the right side of the page provides the following text:

Help

In this section, you define the send channels (methods of transmission) for your reinsurers or destinations.

The transmission service has the ability to try another channel in case one is not available for some reason.

This is the last step of three for setting up your reinsurers or destinations.

Tip 1:

If you have more than one send method available from a reinsurer or destination, be sure you order them correctly. Use the 'Up' and 'Down' buttons to move them into your preferred order.

Tip 2:

Most reinsurers or destinations utilize the 'Secure Extranet' channel type. Make sure that one is selected when adding a new channel.

Add a Processor Channel

The following steps explain how to add a processor channel:

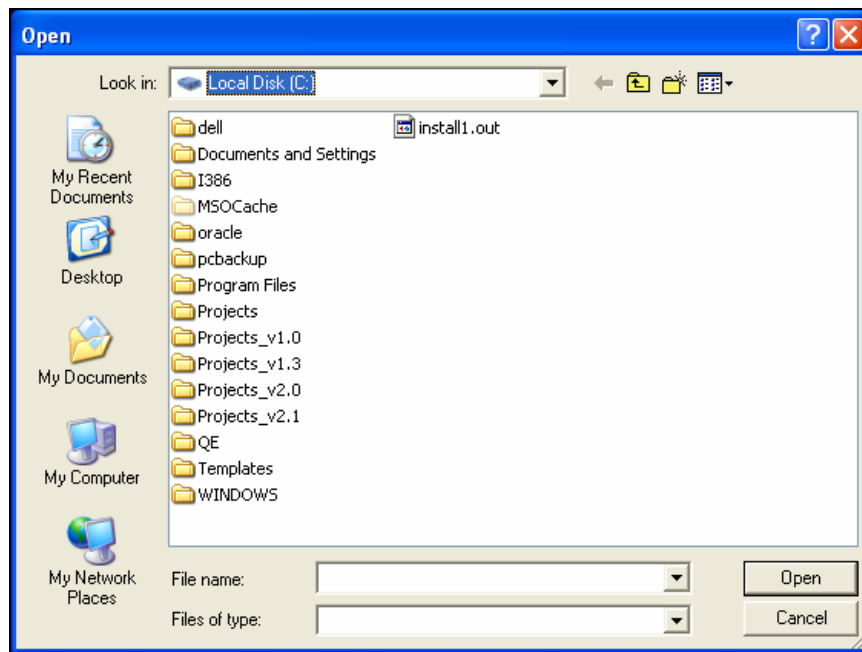
1. Click the arrow in the **Select a Processor** field to select the processor for whom you will create the channel.
2. Click **Add**. All fields at the bottom of the Process Channel tab become active.
3. Click the arrow in the **Channel Type** field and select the method in which you will send files to the processor.



Most reinsurers use the Secure Extranet channel type..

4. Enter the address to which you are sending the transmission in the **Destination Address** field. This address is entered in the format of a web page, for example:
<https://console.rgare.com/tx/test.aspx>.
5. Enter the name of the processor who will be sending the transmission in the **Username** field.
6. Enter the processor's password in the **Password** field.
7. Re-enter the processor's password in the **Password Confirmation** field.
8. Enter the file path of the certificate in the **Certificate Path** field. If you do not know the file path, you may browse for it:
 - a) Click **Browse**. The following window opens:

Figure 7. 8 – Open



- b) Browse for the certificate.

- c) Click **Open** once you find the certificate. The Open window closes and the file path appears in the Certificate Path field.
9. Click **Save**. The new channel appears in the Channels list.
10. Click **Cancel** to reactivate the Channel field if you want to add continue adding channels for processors.

Specify Preferred Order for Multiple Channels

You may set up multiple channels for a processor. One channel is the primary channel; the others are secondary, or backup, channels. If transmissions using the primary channel fail, FAC Console will attempt to send the transmissions using the secondary channels in the order in which they appear in the Send Channels list.

Figure 7.9 – Processor with Multiple Channels

Send Channels			Up
Destination	Channel Type	Preferred	Down
▶ https://console.rgare.com/tx4/TestUpload.as	HTTPS	1	
https://rgare.com	SSMTP	2	

FAC Console assumes that the first channel in the Send Channels list is the primary channel. The primary channel is labeled **1** in the **Preferred** column. The secondary channels are numbered sequentially after 1.

The following steps explain how to change the preferred order of channels:

1. Click the channel that you want to change.
2. Change the channel position within the list:
 - a) Click the **Up** button to move the channel up the list, or
 - b) Click the **Down** button to move the channel down the list.
3. Repeat these steps until you are satisfied with the channel order.

Edit a Processor Channel

The following steps explain how to edit a processor channel:

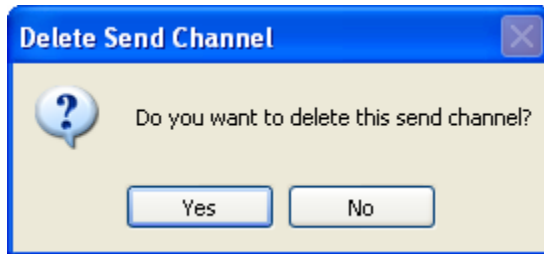
1. Click the arrow in the **Select a Processor** field to select the processor whose channel you want to edit. The processor's channels appear in the Channels list.
2. Click the channel in the **Send Channels** list that you want to edit.
3. Click **Edit**. The fields at the bottom portion of the Processor Channel screen become active.
4. Edit information as necessary.
5. Click **Save**.

Delete a Processor Channel

The following steps explain how to delete a processor channel:

1. Click the arrow in the **Select a Processor** field to select the processor whose channel you want to delete. The processor's channels appear in the Channels list.
2. Double-click the channel in the **Send Channels** list that you want to delete.
3. Click **Delete**. The following confirmation appears:

Figure 7. 10 – Delete Confirmation

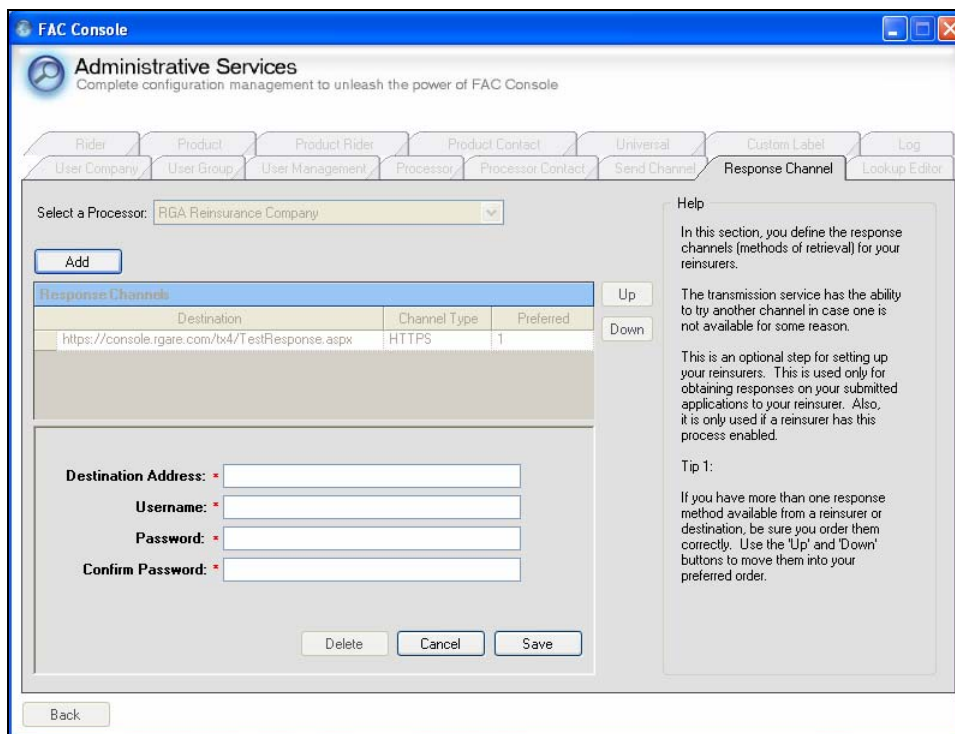


4. Click **Yes**. The system deletes the channel.

Response Channel

The Response Channel tab enables you to set up response channels for reinsurers. A response channel allows you to receive communication from reinsurers regarding submitted applications

Figure 7. 11 – Response Channel



Add a Response Channel

The following steps explain how to add a response channel:

1. Click the arrow in the **Select a Processor** field to select the processor for whom you will create the channel.
2. Click **Add**. All fields at the bottom of the Response Channel tab become active.
3. Enter the address to which the reinsurer sends transmissions in the **Destination Address** field. This address is entered in the format of a web page, for example:
<https://console.rgare.com/tx/test.aspx>.
4. Enter the name of the processor who will be sending the transmission in the **Username** field.
5. Enter the processor's password in the **Password** field.
6. Re-enter the processor's password in the **Confirm Password** field.
7. Click **Save**. The response channel appears in the Response Channel list.

Specify Preferred Order for Multiple Channels

You may set up multiple response channels for a processor. One channel is the primary channel; the others are secondary, or backup, channels. If transmissions using the primary channel fail, FAC Console will attempt to send the transmissions using the secondary channels in the order in which they appear in the Re Channels list. See page 6-15, "Specify Preferred Order for Multiple Channels" for instructions on setting the preferred channel order.

Edit a Response Channel

The following steps explain how to edit a processor channel:

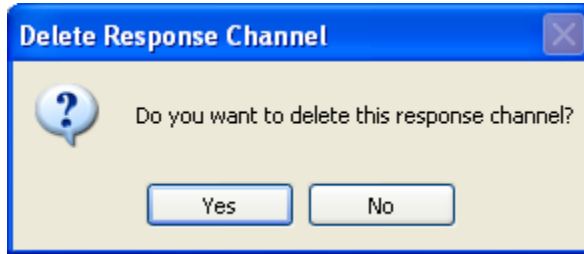
1. Click the arrow in the **Select a Processor** field to select the processor whose channel you want to edit. The processor's channels appear in the Channels list.
2. Click the channel in the **Response Channels** list that you want to edit.
3. Click **Edit**. The fields at the bottom portion of the Response Channel screen become active.
4. Edit information as necessary.
5. Click **Save**.

Delete a Processor Channel

The following steps explain how to delete a processor channel:

1. Click the arrow in the **Select a Processor** field to select the processor whose channel you want to delete. The processor's channels appear in the Response Channels list.
2. Double-click the channel in the **Response Channels** list that you want to delete.
3. Click **Delete**. The following confirmation appears:

Figure 7. 12 – Delete Confirmation



4. Click **Yes**. The system deletes the response channel.

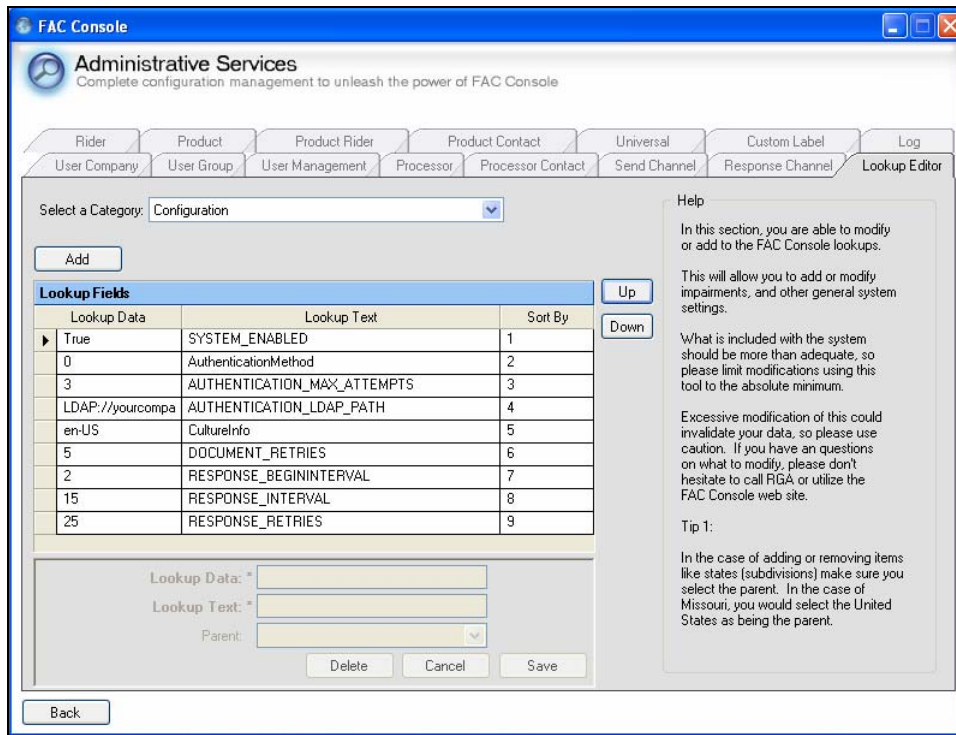
Lookup Editor

The Lookup Editor tab enables you to customize predetermined reference fields that appear throughout FAC Console.



Lookup fields are an important part of the programming code in FAC Console. Please contact the Help Desk at (636) 736-7200 or send an e-mail to helpdesk@rgare.com if you would like fields added or changed.

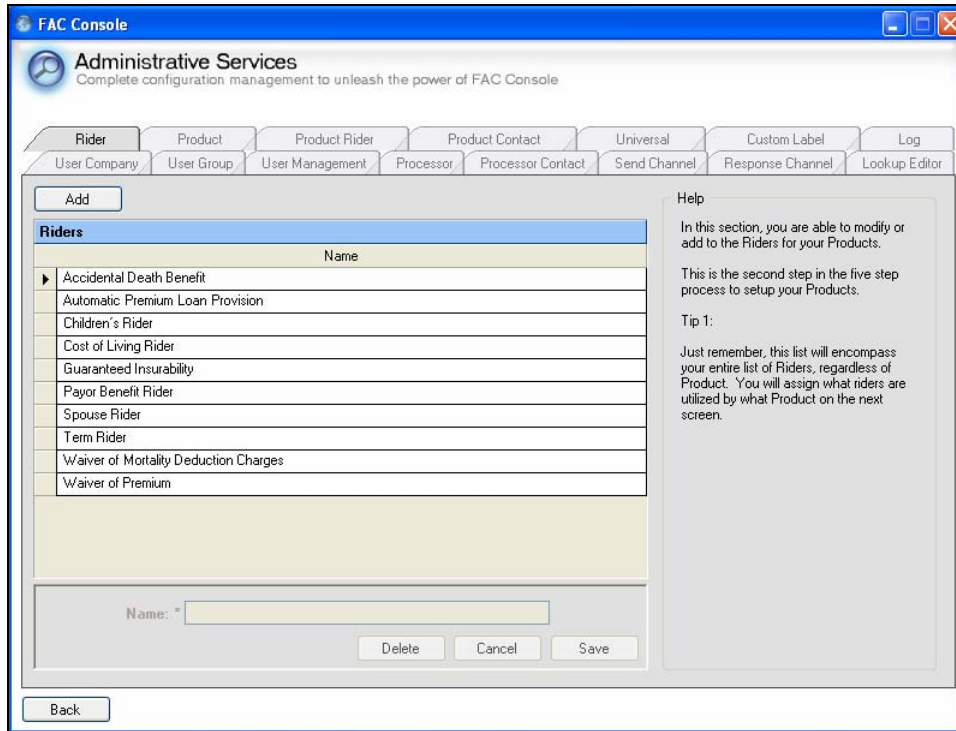
Figure 7. 13 – Lookup Editor



Rider

The Rider tab enables you to add new rider options. Riders appear on the Coverages tab in Application Management. See Chapter 2, “Application Management” for more information on selecting riders for an application.

Figure 7. 14 – Rider



Add a Rider

The following steps explain how to add a rider:

1. Click **Add**. The Name field becomes active.
2. Enter the name of the rider option in the **Name** field.
3. Click **Save**.

Edit a Rider Option

The following steps explain how to edit a rider option:

1. Double-click the rider that you want to edit in the **Riders** grid. The Name field becomes active.
2. Change the name of the rider in the **Name** field.
3. Click **Save**.

Delete a Rider

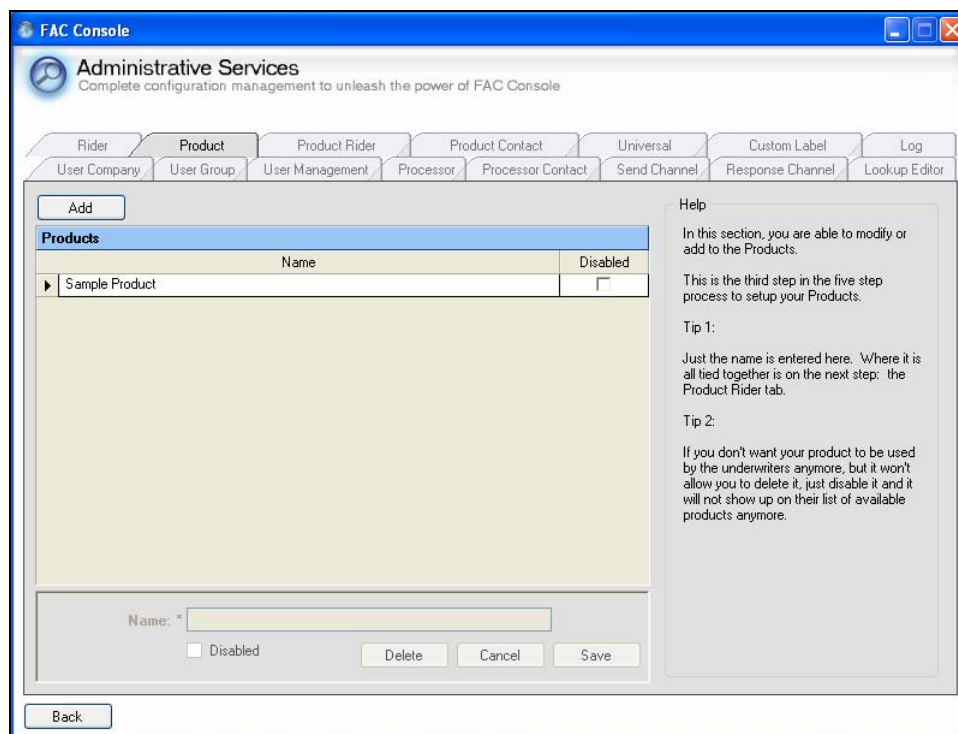
The following steps explain how to delete a rider:

1. Double-click the rider that you want to delete in the **Rider** grid.
2. Click **Delete**.
3. Click **Save**.

Product

The Product tab enables you to add new products to FAC Console. You may also edit and delete existing products using the Product tab.

Figure 7. 15 – Product



Add a Product

The following steps explain how to add a product using the Product tab:

1. Click **Add**. The Name field becomes active.
2. Enter the name of the new product in the **Name** field.
3. Click **Save**. The new product appears in the Products grid.

Edit a Product

The following steps explain how to edit a product:

1. Double-click the product that you want to edit in the **Products** list.
2. Change the product name in the **Name** field.
3. Click the **Disabled** check box if you want to make this product unavailable.
4. Click **Save**.

Delete a Product

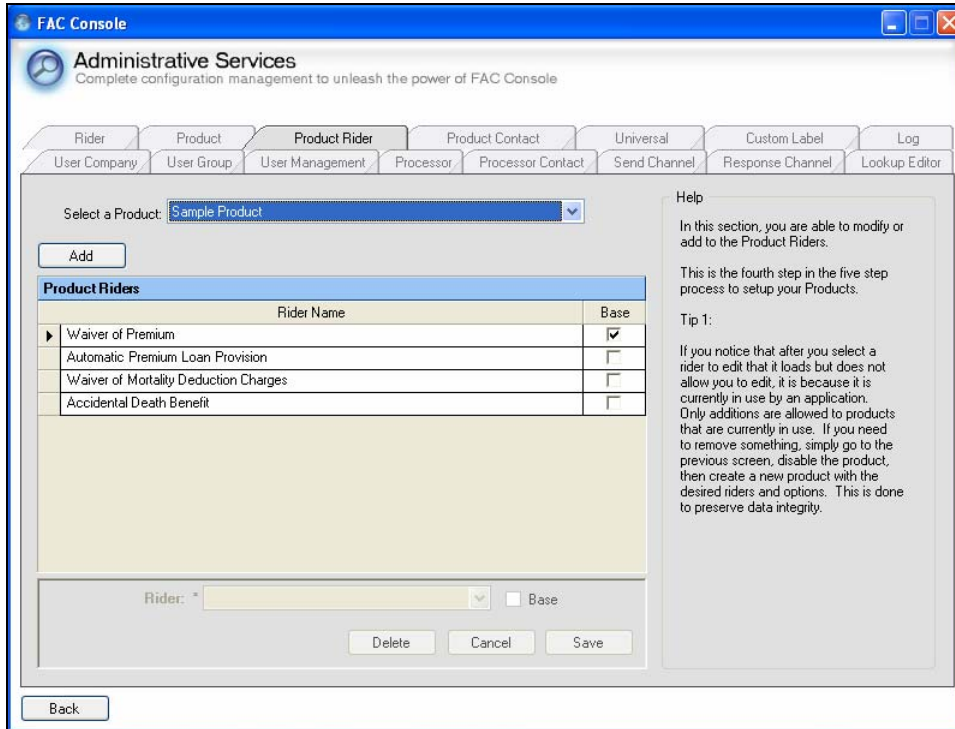
The following steps explain how to delete a product:

1. Click the product that you want to delete in the **Products** list.
2. Click **Delete**.

Product Rider

The Product Rider tab enables you to add riders that you created on the Riders tab to the products that you created on the Products tab.

Figure 7. 16 – Product Rider



Add a Product Rider

The following steps explain how to add a rider to a product:

1. Click the arrow in the **Select a Product** field and select the product to which you want to add a rider. A list of riders already attached to the product appears in the Product Riders grid.
2. Click **Add**. The Rider field becomes active.
3. Click the arrow in the **Rider** field and select the rider that you want to attach to the product.
4. Click the **Base** checkbox if the rider is the base benefit of this product.
5. Click **Save**.

Edit a Product Rider

The edit function enables you to replace one rider with another. You may only edit product riders that are not in use on any application. The following steps explain how to edit a product rider:

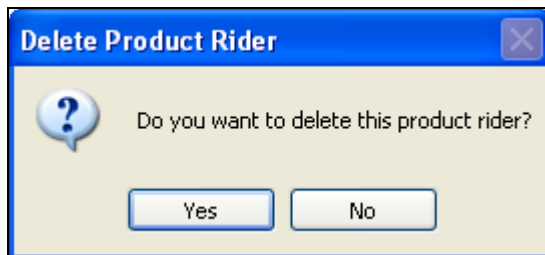
1. Click the arrow in the **Select a Product** field and select the product whose riders you want to edit.
2. Double-click the rider in the **Product Riders** grid.
3. Click the arrow in the **Rider** field and select the rider that you want to replace.
4. Click the **Base** checkbox if the rider is the base benefit of this product.
5. Click **Save**.

Delete a Product Rider

The following steps explain how to delete a product rider:

1. Click the arrow in the **Select a Product** field and select the product whose riders you want to delete.
2. Double-click the rider in the **Product Riders** grid.
3. Click the **Delete**. The following confirmation appears:

Figure 7. 17 – Delete Confirmation

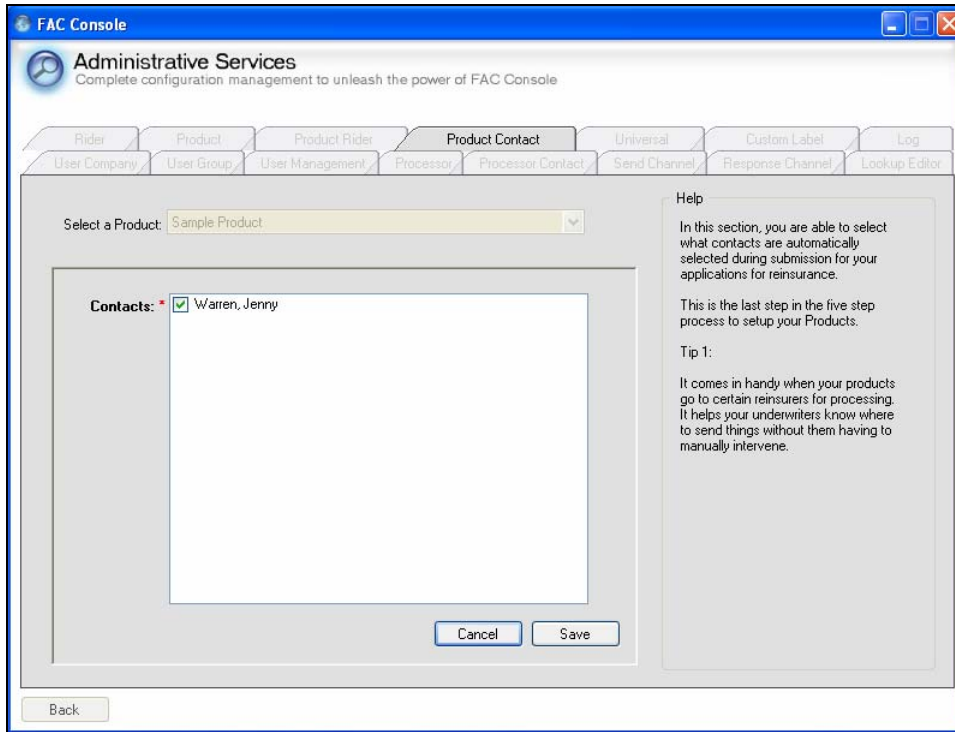


4. Click **Yes**.
5. Click **Save**.

Product Contact

The Product Contact screen enables you to assign contacts to each product in FAC Console. FAC Console automatically selects these contacts when you submit an application for reinsurance.

Figure 7. 18 – Product Contact



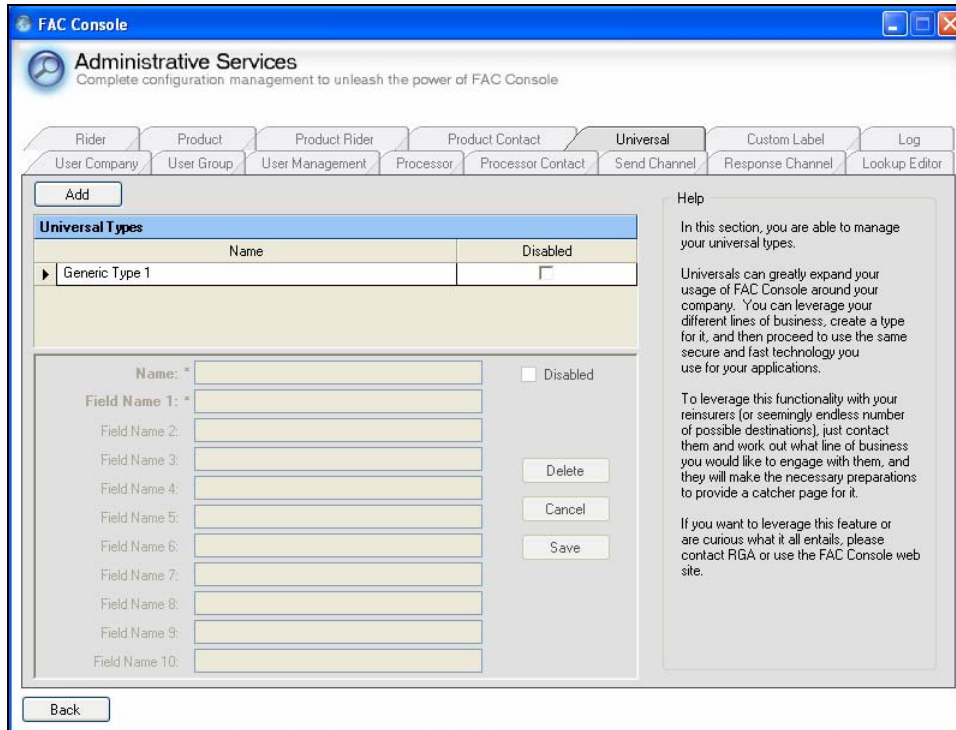
The following steps explain how to add a contact to a product:

1. Click the arrow in the **Select a Product** field and select the product to which you want to add a contact. A list of contacts appears in the Contacts area.
2. Click the checkbox beside each contact that you want to add to the product.
3. Click **Save**.

Universal

The Universal tab enables you to create new screens that appear in Universal Management. These screens may be for specific information that you want to capture for a particular application, such as auditing information. See Chapter 3, “Universal Management” for more information.

Figure 7. 19 – Universal Editor



Add a Universal Management Screen

The following steps explain how to add a screen that appears in Universal Management:

1. Click **Add**. The fields on the Universal tab become active.
2. Enter the name of the new screen in the **Name** field.
3. Enter the name for each field that will appear on the new screen in the **Field Name** fields. You may create a maximum of 10 new fields.
4. Click **Save**.

Edit a Universal Management Screen

The following steps explain how to edit an existing Universal Management screen:

1. Double-click the screen that you want to edit in the **Universal Types** list.
2. Change the information in the **Field Name** fields as necessary.
3. Click the **Disabled** checkbox if you want to disable the screen.
4. Click **Save**.

Delete a Universal Management Screen

The following steps explain how to delete an existing Universal Management screen:

1. Select the screen that you want to delete in the **Universal Types** list.
2. Click **Delete**.

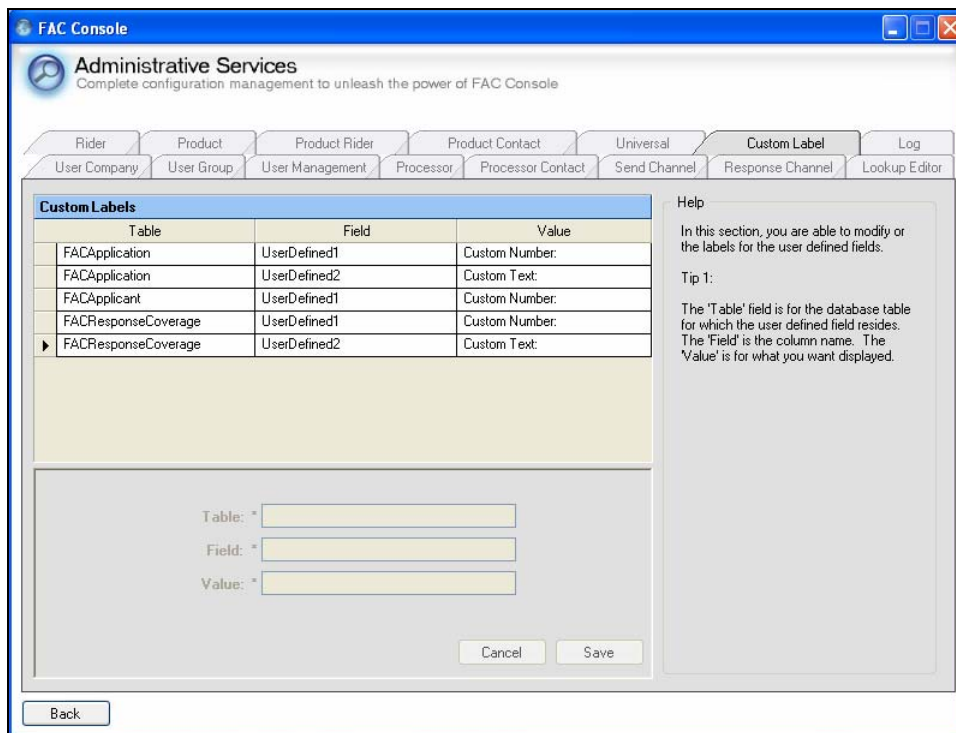


You may only delete Universal Management screens that are currently in use. Instead, you may need to disable the screen. See "Edit a Universal Management Screen" on page 6-26 for more information on disabling a screen.

Custom Label

The Custom Label tab enables you to modify the labels on user defined fields.

Figure 7. 20 – Custom Label



The following steps explain how to modify a custom label:

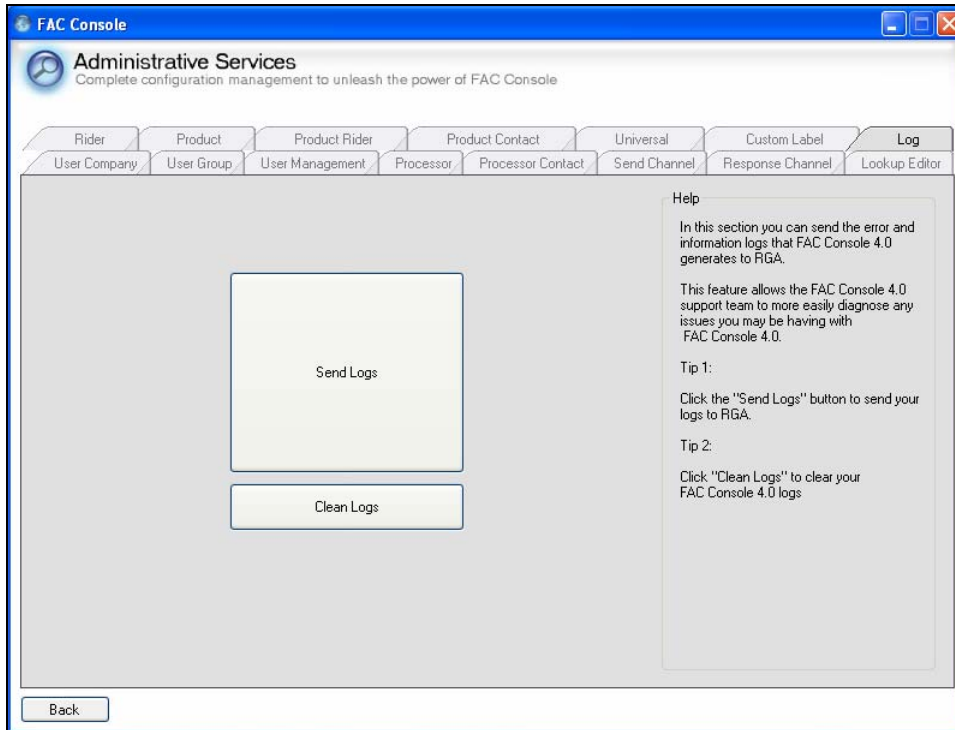
1. Double-click the custom label that you want to modify in the **Custom Labels** grid.
2. Modify the table name that appears in the **Table** field. This field contains the name of the database table in which the user defined field resides.
3. Modify the field name that appears in **Field**. This is the column name in which the user defined field resides in the table.
4. Modify the value that appears in the **Value** field. Value is the text that displays for the user defined field.
5. Click **Save**.

Log

The Log tab enables you to send error and information logs to RGA. Sending these logs enables the FAC Console team to resolve any system issues that you may experience in a more efficient manner.

The Log tab also enables you to clear all stored logs from FAC Console.

Figure 7. 21 – Log



Send Logs to RGA

Click the **Send Logs** button to send information and error logs to RGA.

Clear Logs

Click the **Clean Logs** button clear FAC Console of all stored logs.