Policy Administration: Quick Guide

It's important to us that all of our clients are able to use our website as easily and efficiently as possible. This Quick guide is designed to introduce you to our improved 'Policy Administration Area' and to help you find your way around it. This is the place where you can buy new and administer existing ATE polices. If you have questions about anything we haven't covered here; don't hesitate to get in touch. We're here to help.

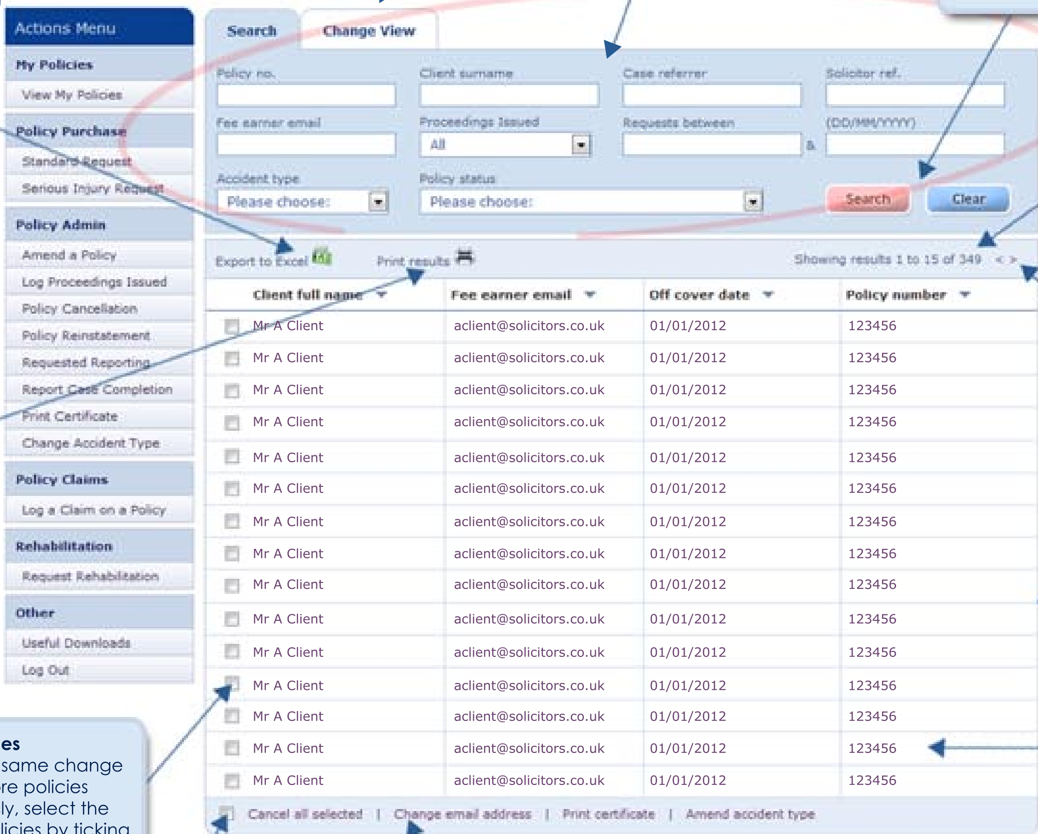
Actions Menu
From the 'Actions Menu' you can purchase new, and administer exisiting policies.

Change View
Select 'Change View' and choose alternative data options to display (Up to a Maximum of 4). The image at the foot of the page illustrates the options available.

Search Criteria
Use any or all of the search criteria provided to find the information you're looking for.

Commence Search
Once you've selected your preferred search criteria, click the 'Search' button to begin. Clicking on 'Search' without selecting any criteria will display all of your policies.

Policy Administration Area



Export to Excel
Download the results of a search as an Excel spreadsheet

Print Results
Print the results of a search.

Search Results
The total number of records produced by a search (349 in this example) are shown here.

Cycle Through Search Results
When more than 15 policies have been produced by a specific search, clicking on these arrows will allow you to cycle through them.

Policy List
Up to 15 policies are displayed on screen at one time.

View Policy Details
Click on any of the data elements in the row to view policy details.

Block Changes
To make the same change to one or more policies simultaneously, select the individual policies by ticking the corresponding boxes at the begining of each row.

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Alternatively, select all polices shown on the screen by ticking the 'Select all' box.

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Once you have selected the polices you wish to amend, simply click on one of the four actions shown in the blue bar to apply it.

Search/Change View Panel
The image to the right shows the 'Change View' panel from the top of the page. Use the two tabs to switch between the 'Search' and 'Change View' panels.

In 'Change View' (seen here), select the data types you'd like to view by ticking the respective boxes alongside each options. Click on the 'Update Columns' bar to update the column headers.