THOMSON REUTERS™ ODEN POLICY TERMINATOR

UTILITIES TASKS

JUNE 2021

Document Version 1

THOMSON REUTERS®

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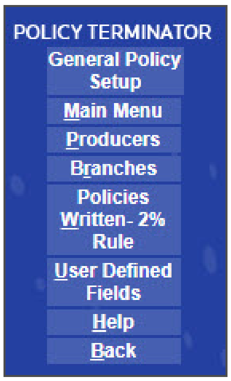
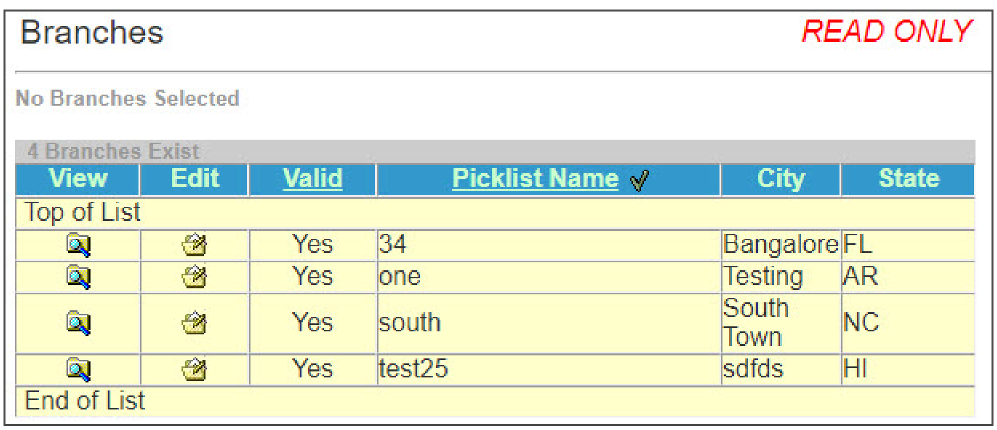
ADDING A BRANCH

Add company branch locations to create a pick list of company branches. Branch information is required in order to create a notice.

1. On the Main Menu, select **Utilities > Data Setup > General Policy Setup**.



2. Select **Branches**.



Branches

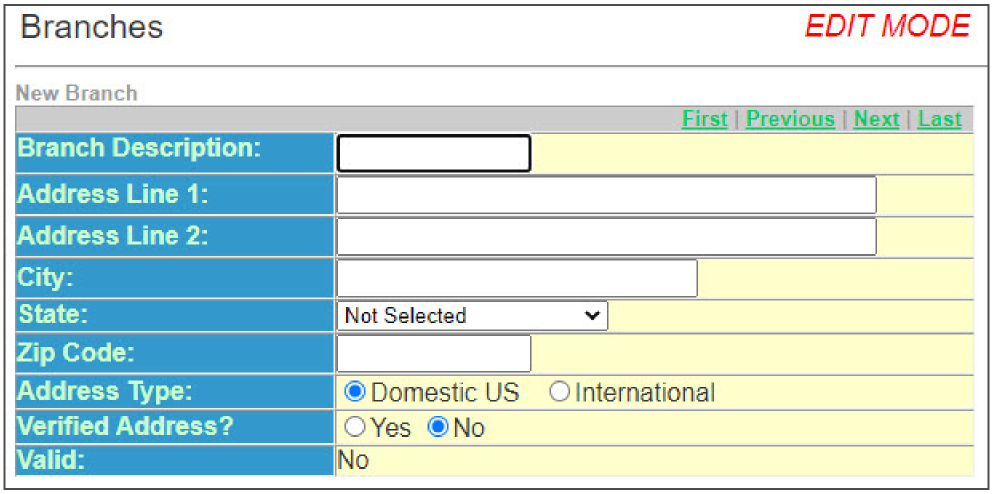
READ ONLY

No Branches Selected

4 Branches Exist

View	Edit	Valid	Picklist Name ✓	City	State
Top of List					
		Yes	34	Bangalore	FL
		Yes	one	Testing	AR
		Yes	south	South Town	NC
		Yes	test25	sdfds	HI
End of List					

3. Select **Add New**.



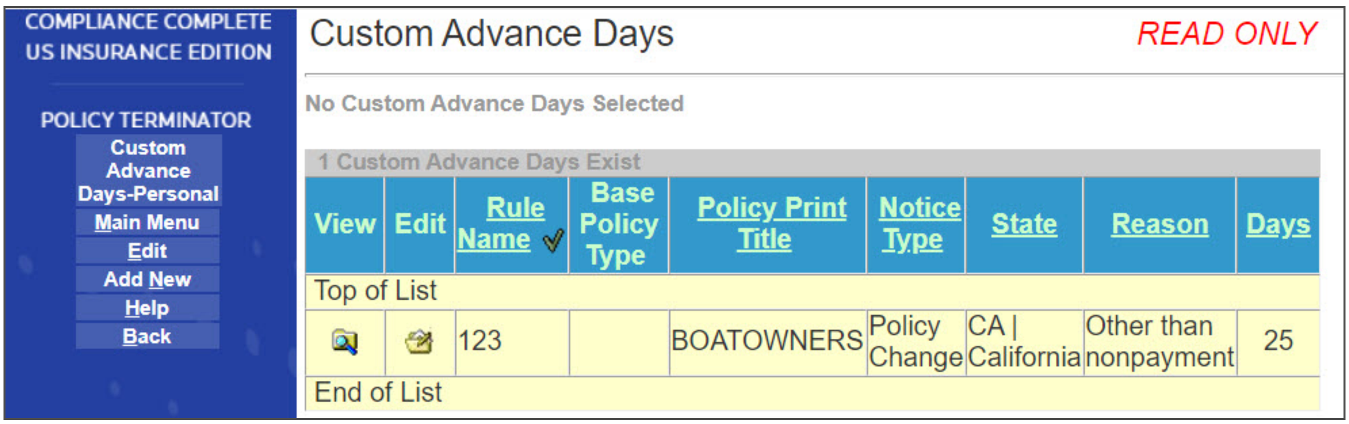
The address on this page is the address that prints beneath the name of the insurance carrier at the top of a notice. Generally, this is the address of the issuing office or the office the insured would contact for more information.

4. Enter the **Branch Description**. An 8 character code identifying a particular branch. This description allows you to select a branch from a pick list.
5. Enter the **Address Line 1**. The first line of the branch address.
6. Enter the **Address Line 2**. The second line of the branch address, if applicable.
7. Enter the **City**. The city in the branch address.
8. Enter the **State**. The state in the branch address.
9. Enter the **Zip Code**. The zip code in the branch address.
10. Select the **Address Type** from the options **Domestic** or **International**.
11. Valid – Indicates **Yes** or **No**. This will change to Yes once you save the information and
12. Policy Terminator determines that all the required information is included.
13. On the side menu, select **Save/Return**.

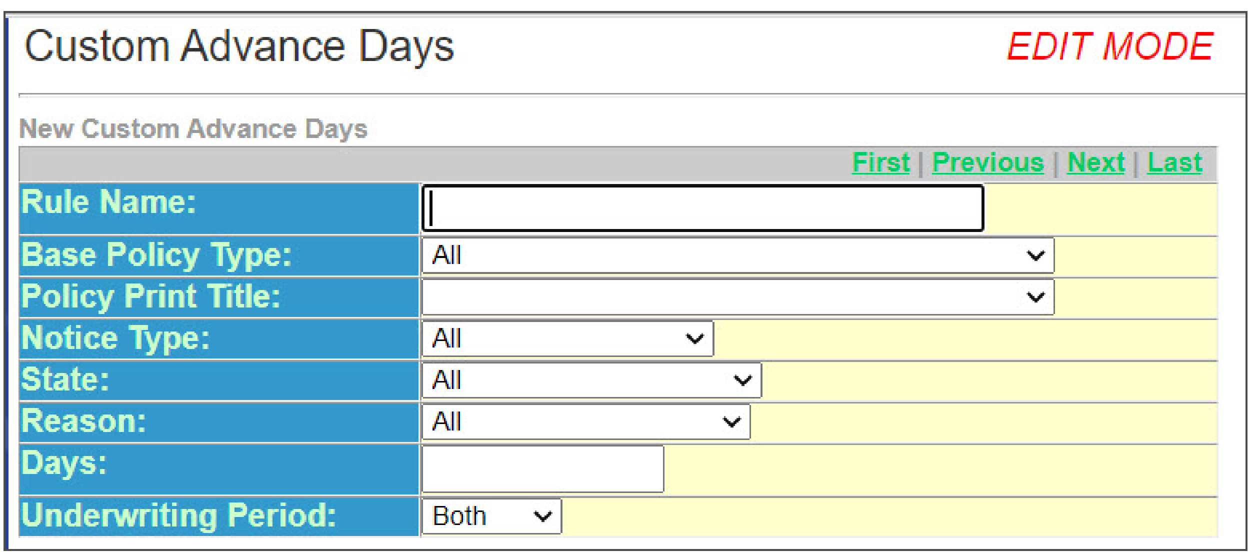
ADDING CUSTOM ADVANCE DAYS

Use this screen to add the address of the issuing office or the office the insured would contact for more information.

1. On the **Main Menu**, select **Utilities > Data Setup** .
2. Select either **Personal** or **Commercial Lines Data Setup**.
3. Select **Custom Advance Days**.



4. On the side menu, select **Add New**.



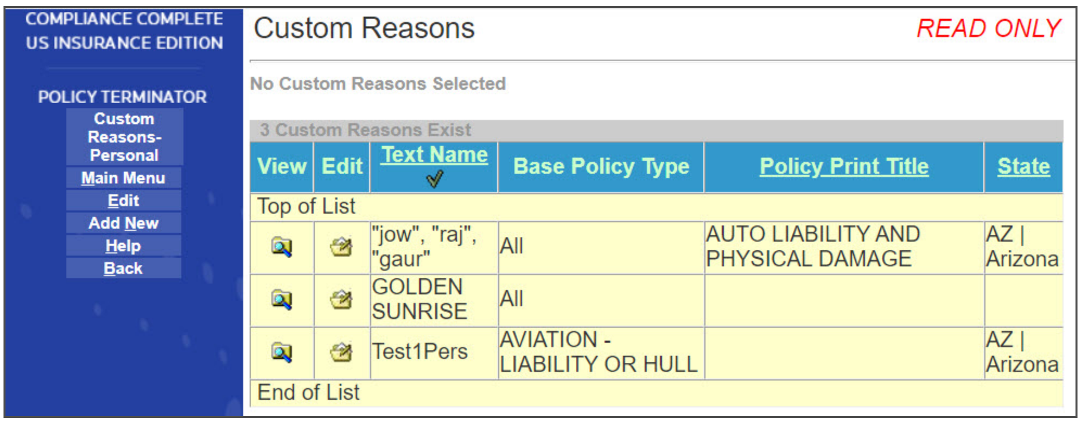
5. Enter the **Rule Name**. This is an identifying code for this specific situation.

6. Select the **Base Policy Type** (The policy type to which this rule applies) from the drop-down list.
7. Select the **Policy Print Title** from the drop-down list.
8. Select the **Notice Type** (The notice type to which this rule applies) from the drop-down list.
9. Select the **State** (The state(s) in which this rule applies.)
10. Select the **Reason** either **Other Than Nonpayment** or **Nonpayment**.
11. Enter the number of **Days** the notice is assigned.
12. On the side menu select **Save and Return**.

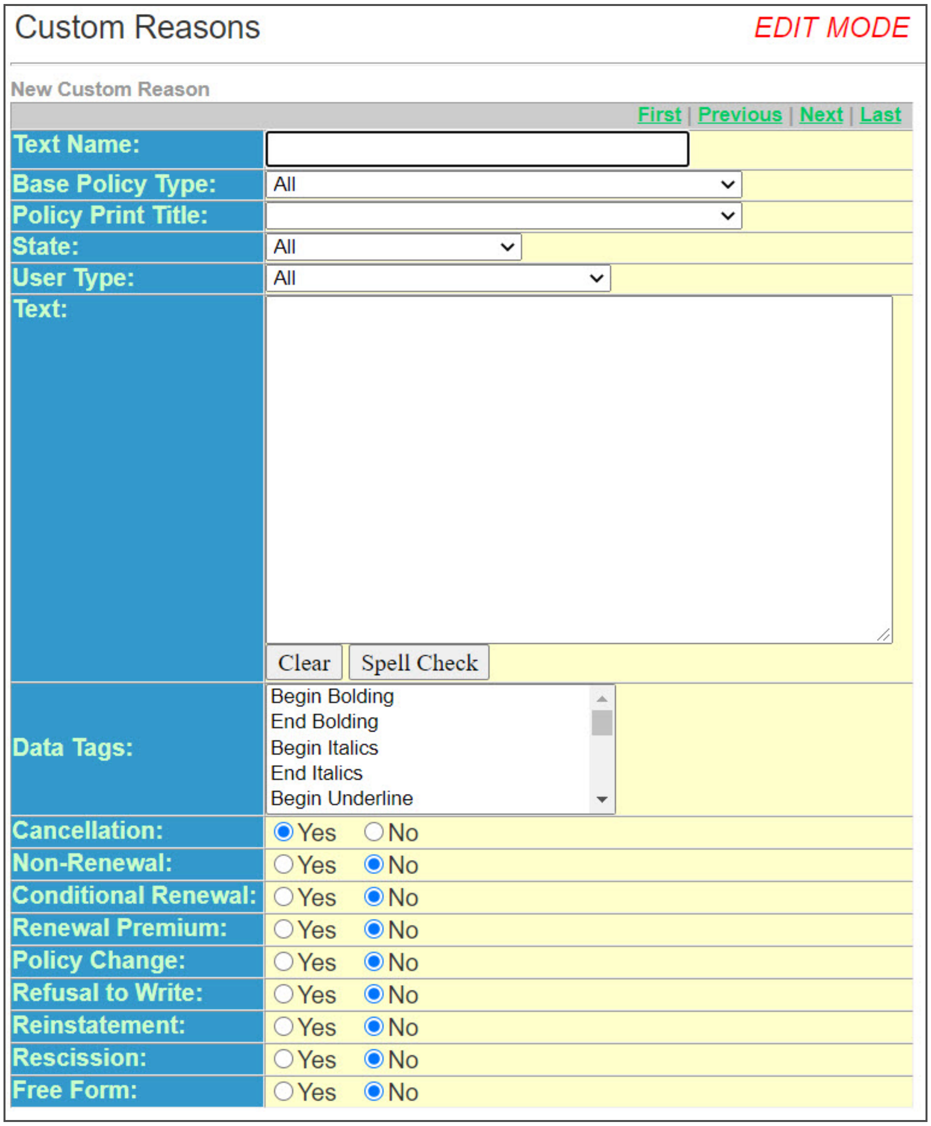
ADDING A CUSTOM REASON

Use this screen to add the address of the issuing office or the office the insured would contact for more information.

1. On the **Main Menu**, select **Utilities > Data Setup** .
2. Select either **Personal** or **Commercial Lines Data Setup**.
3. Select **Custom Reason**



4. Select **Add New**



5. Enter the **Text Name**. An identifying code for this specific custom reason.

6. Select the **Base Policy Type** from the drop-down list.

7. Select the **Policy Print Title** from the drop-down list.

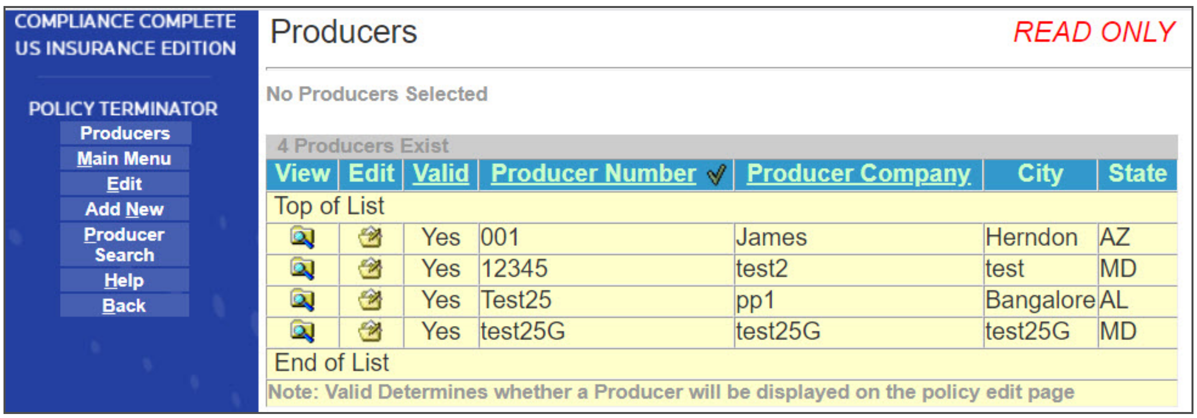
8. Select the **State** that applies from the drop-down list.

9. Select the **User Type** from the drop-down list.
10. Enter the **Text** for the Custom Reason. The standard wording you wish to pre- fill in the reason of the notice.
11. Select **Clear** to start over with the text.
12. Select **Spell Check** to check the spelling of the wording in the text box.
13. Select **Data Tags** for formatting the text.
14. Available as **Free Form** text – Yes or No – Allows this text to be used when producing a Free Form Notice.
15. Available as **Reinstatement** text – Yes or No – Allows this text to be used when producing a Reinstatement Notice.
16. Available as **Termination** text – Yes or No – Allows this text to be used when producing a notice of cancellation, nonrenewal, conditional renewal.
17. Select **Save/Return**

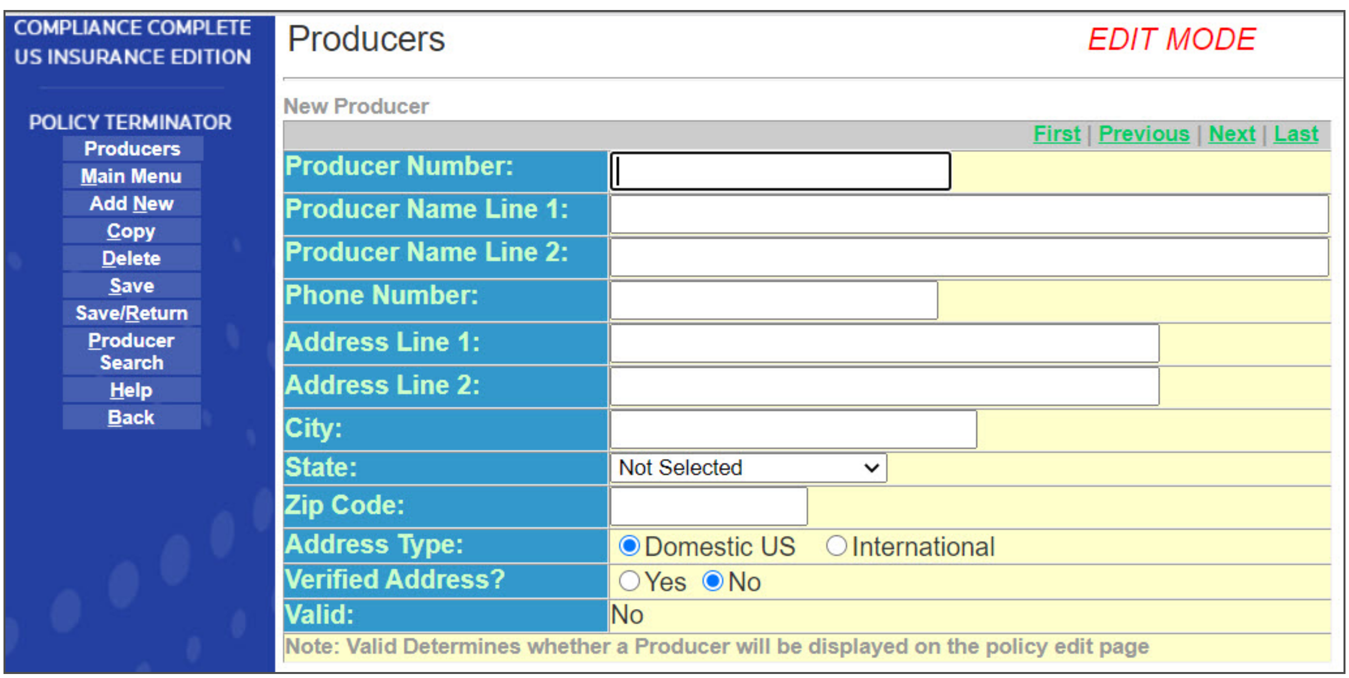
ADDING A PRODUCER

Add producers to create a pick list of company producers. Producer information is required in order to create a notice.

1. On the Main Menu, select **Utilities > Data Setup > General Policy Setup**.
2. On the side menu, select **Producers**.



3. On the side menu select **Add New**.

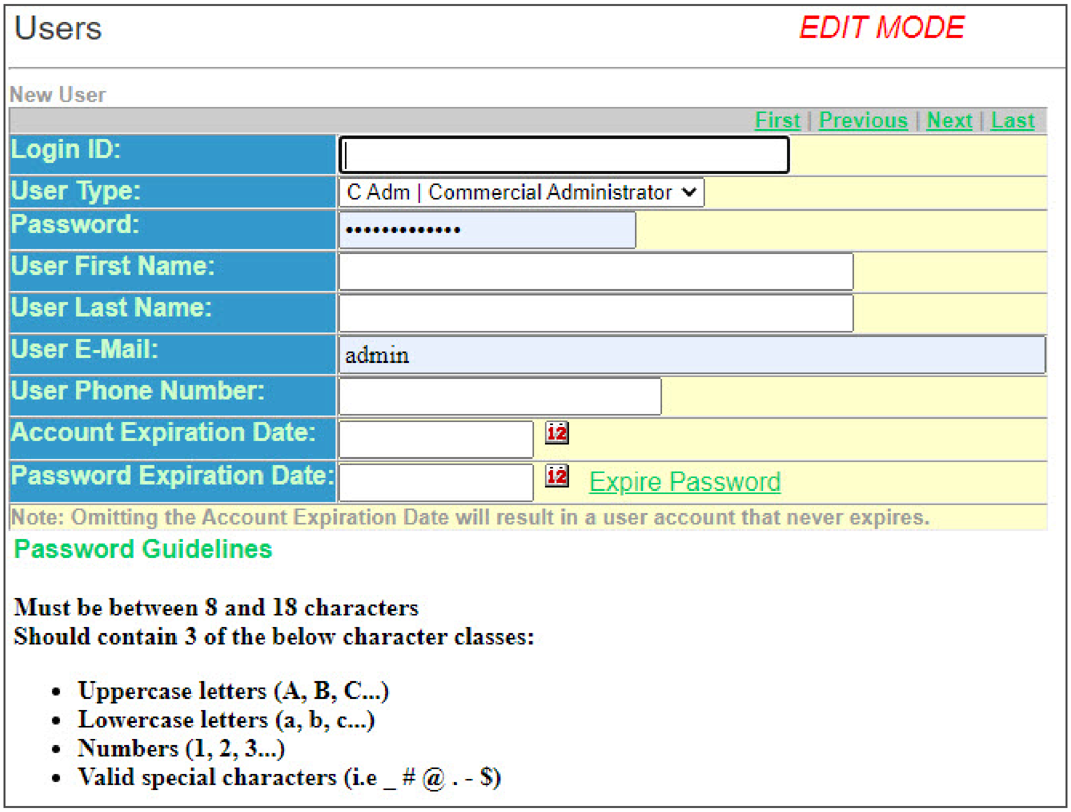


4. Enter a **Producer Number**. A character string code that identifies a particular producer or agent. This description allows you to select a producer from a pick list.
5. Enter **Producer Name Line 1**. The first line of the Producers name (This is generally the agency name).
6. Enter **Producer Name Line 2**. The second line of the Producer name, if applicable.
7. Enter **Address Line 1** for the Producer address.
8. Enter **Address Line 2** for the Producer address, if applicable
9. Enter the **City** for the Producer address.
10. Select the **State** from the drop-down list for the Producer address.
11. Enter the **Zip Code** for the Producer address.
12. Select the **Address Type** - domestic or international.
13. **Valid** – Indicates Yes or No. This will change to Yes once you save the information and Policy Terminator determines that all the required information is included.
14. On the side menu select **Save/Return**.

ADDING A USER

1. On the Main Menu, select **Utilities > Security > Users**.

2. On the side menu, select **Add New**.



3. Enter a unique **Login ID** for this user.

4. Select the **User Type** from the drop-down list. (See Types of Users for definitions.)

5. Enter a unique **Password** for this user according to the Password criteria.

6. Enter the **User First Name**.

7. Enter the **User Last Name**.

8. Enter the **User E-Mail**.

9. Enter the **User Phone Number**.

10. Enter the **Account Expiration Date**. If you leave this blank the account will never expire.
11. Enter the **Password Expiration Date**. If you leave this blank the password will never expire.
12. On the side menu, select **Save/Return**.

CREATING A FREE FORM TITLE AND WORDING

You can create Free Form Notices to suit your specific purposes. They are created in two steps:

From the **Main Menu > Utilities**

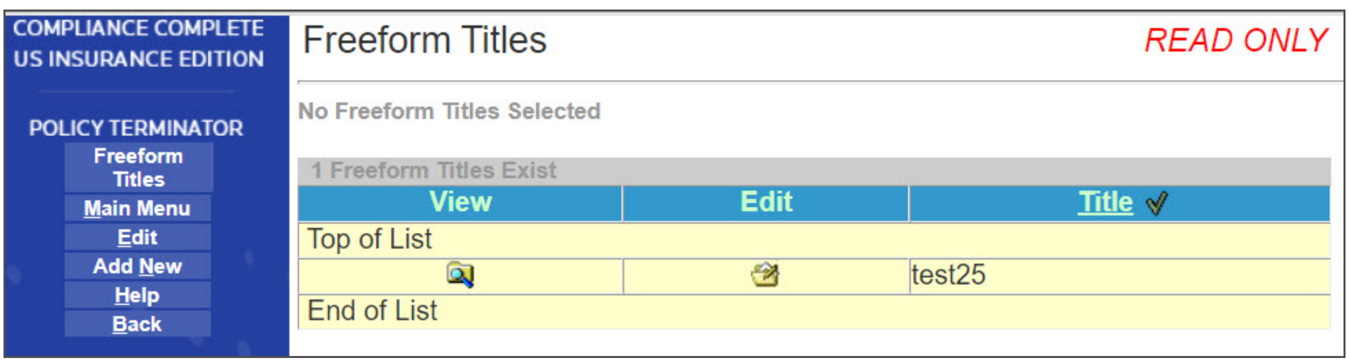
Step 1 – Create a Free Form Title

Step 2 – Create Custom Reason Wording to go with the Free Form Title

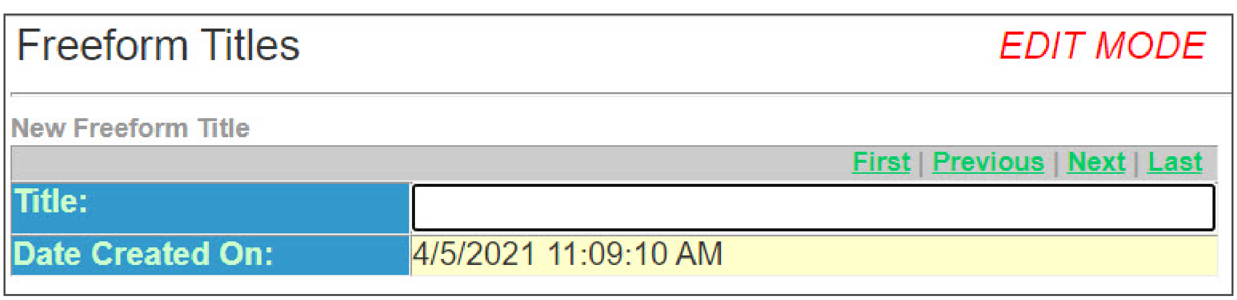
CREATING A FREE FORM TITLE

Add freeform titles to create a pick list of titles to appear on freeform notices.

1. Select **Data Setup > General Notice Setup**.
2. Select **Free Form Titles**.



3. Select **Add New**.



4. Enter the **Title** that you wish to print across the top of the notice.
5. **Save and Return**.
6. On the side menu, select **Back** to return to the **General Notice Setup**.
7. On the side menu, select **Back** to return to **Data Setup**.

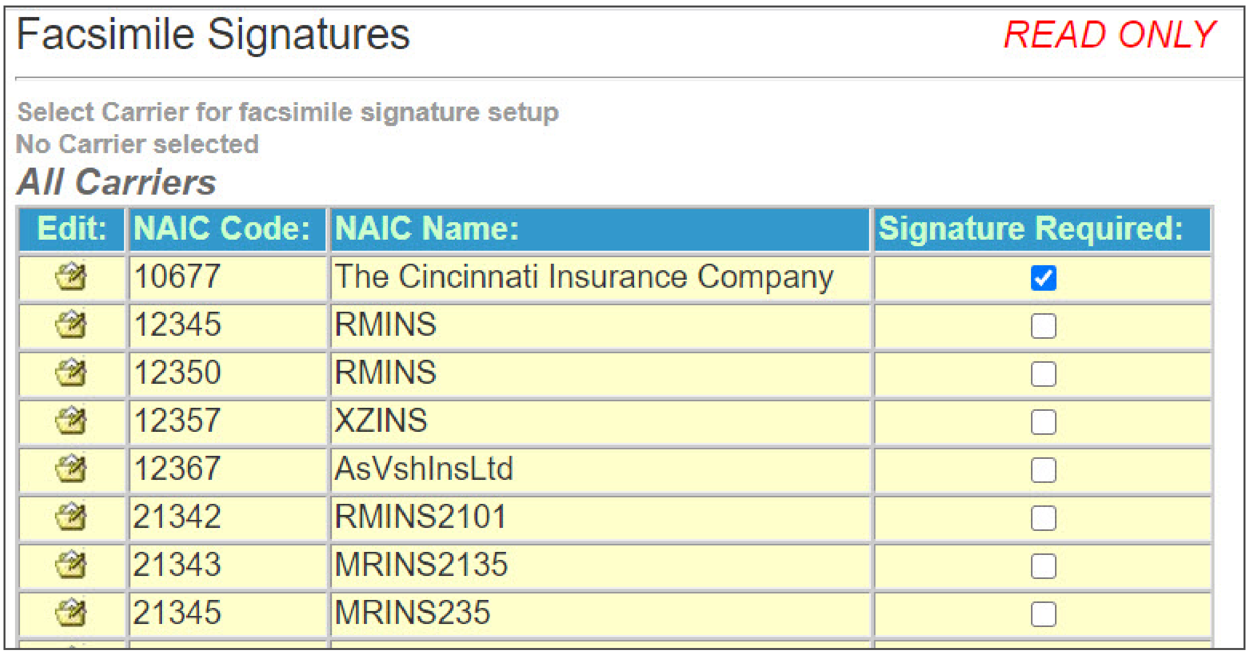
CREATING A CUSTOM REASON WORDING

1. Select **Personal or Commercial Lines**.
2. Select **Custom Reasons**.
3. Select Add New.
4. When you select the **Free Form Title** and the corresponding **Custom Reason** then you can produce a Free Form Notice.

LOADING FACSIMILE SIGNATURES

Add facsimile signatures to create a pick list of electronic signatures of persons authorized to sign notices. You must scan and save facsimile signatures as *.JPG files before adding the signature to Policy Terminator. Make sure you scan just the signature. Too much white space around the signature prevents it from loading.

1. From the Main Menu, select **Utilities > Data Setup > General Notice Setup**.
2. On the side menu, select **Facsimile Signatures**.



Facsimile Signatures READ ONLY

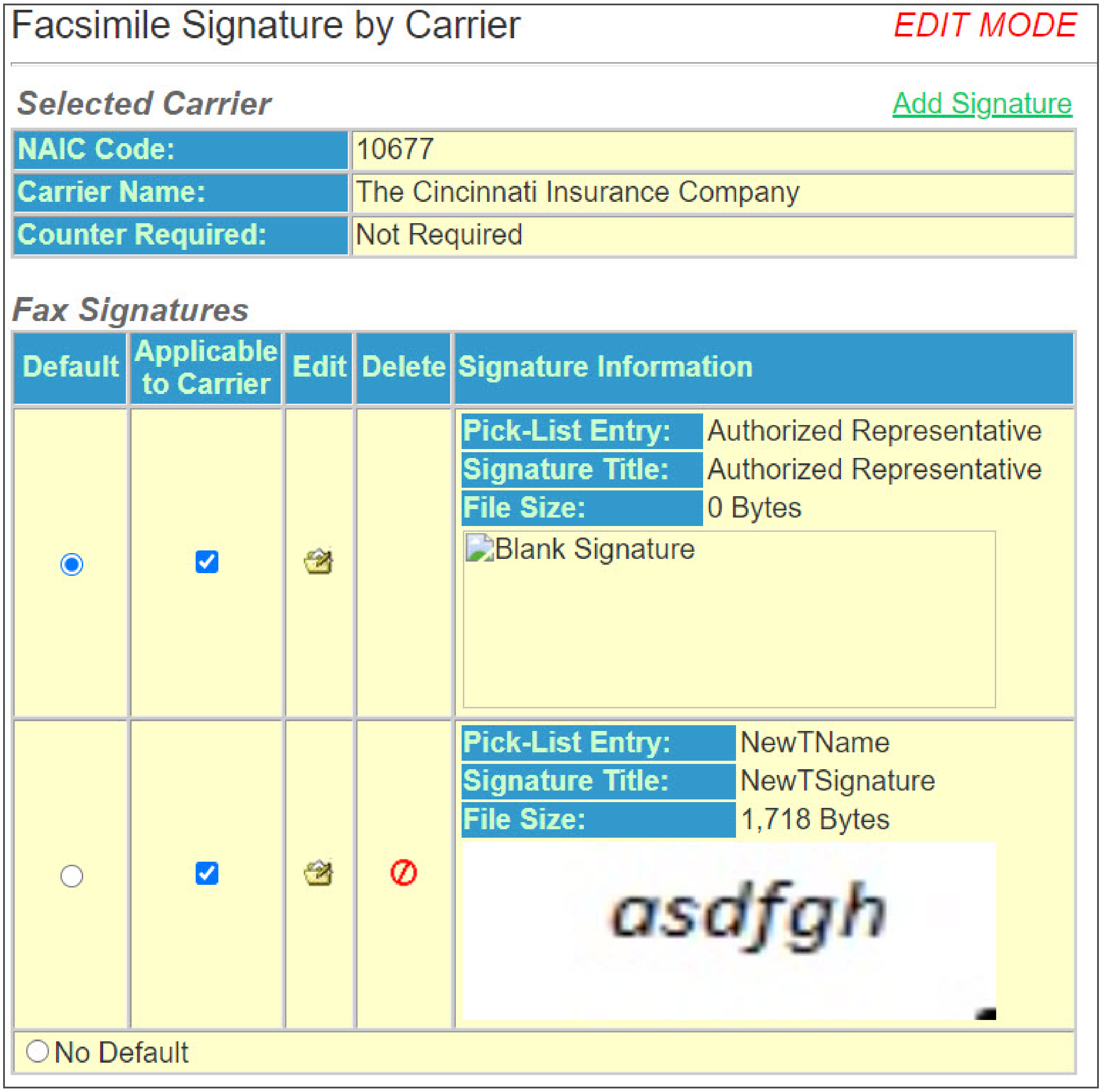
Select Carrier for facsimile signature setup
No Carrier selected

All Carriers

Edit:	NAIC Code:	NAIC Name:	Signature Required:
	10677	The Cincinnati Insurance Company	☑
	12345	RMINS	☐
	12350	RMINS	☐
	12357	XZINS	☐
	12367	AsVshInsLtd	☐
	21342	RMINS2101	☐
	21343	MRINS2135	☐
	21345	MRINS235	☐

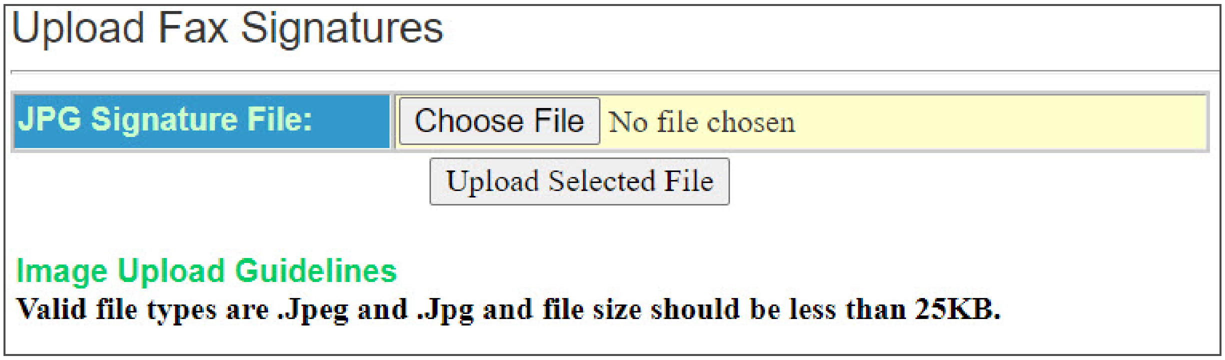
3. A list of the insurance carriers for which you have contracted to produce notices will be listed.

4. Select the **Edit** Icon for the carrier to which your signature applies.



5. This is a list of current signatures, if any.

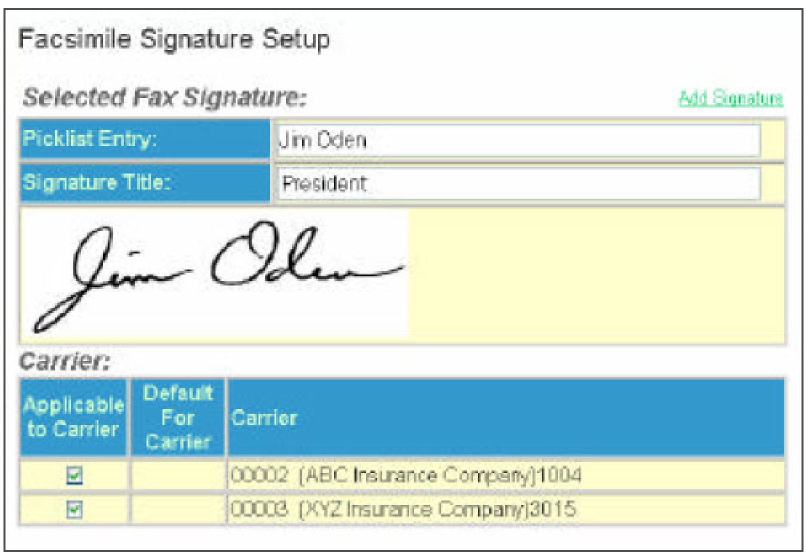
6. On the side menu, select **Add Signature**.



7. Enter the file location and name or select **Browse** to find the .jpg file you have created.

8. Upload the selected file.

9. On the side menu, select **Save/Return**



10. Enter the **Pick List Entry**. The name that will appear in a pick list when the operator is producing a notice.

11. Enter a **Signature Title**. The title of the person whose signature will be printed on the notice.

12. Select the **Applicable to Carrier**(s). Select those carriers to which the signature applies.

13. On the side menu, select **Save**.

14. Once you save the signature, you can select if it should default to one or more carriers.

15. On the side menu, select **Save/Return**.

You will see the signature in the Facsimile Signature table.

GROUP OPTIONS

The **Group Options** screen contains the following sections of information:

General Information

Notice Print Defaults

Print Actions

Mailing Defaults

Notice Defaults

Security Defaults

Message of the Day

Batch Print Settings

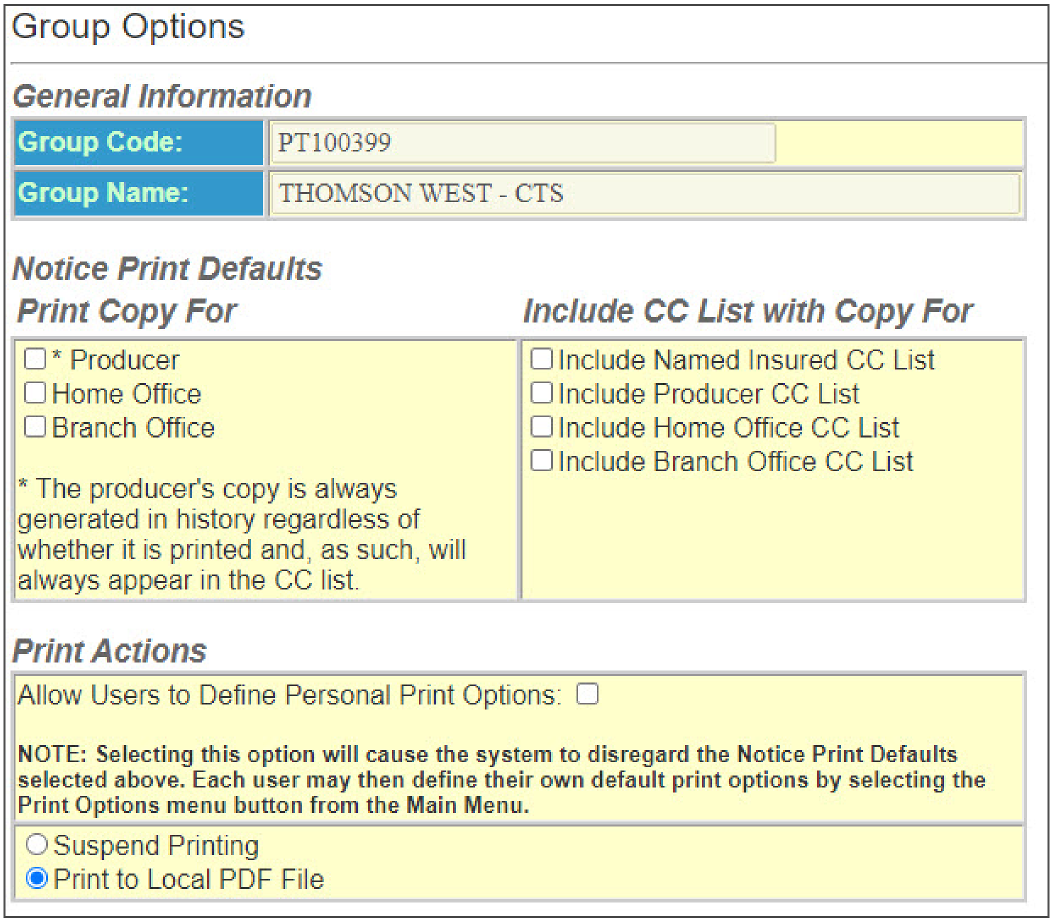
OMR Settings

Verified Address Flag

Additional Interest Default Notice Types

GROUP OPTIONS - GENERAL INFORMATION, PRINT DEFAULTS, PRINT ACTIONS

Use this screen to define default values and options for this group.



1. In **General Information**:

    a. Group Code – The Group Code assigned to the account by ODEN or your System Group Administrator.

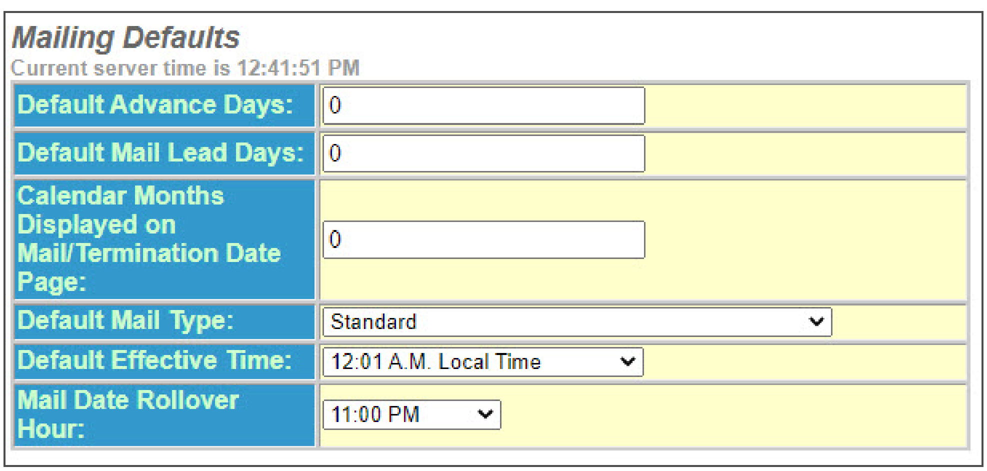
    b. Group Name – The Group Name assigned to the account by ODEN or your System Group Administrator.

    c. User-Defined Fields – Fields that can be added and used to track information not captured in the existing Policy Terminator program.

2. In the **Notice Print Defaults Print Copy For** - The following options set the print defaults for all users in the group.
    a. Producer – Print a copy of the notice to send to a producer or agent.
    b. Home Office – Print a copy for Home Office files.
    c. Branch Office – Print a copy for Branch Office files.
3. **Include CC List with Copy For** - Select the parties who will receive a list of notice recipients.
4. In the **Print Actions** section:
    a. Allow Users to Define Personal Print Options – Allows the user to ignore the Group defaults and set their own defaults.
    b. Suspend Printing – Sets the default to print all notices done in a given period of time to print in one batch.
    c. Print to Local PDF File – Sets the default to print each notice as it is generated.
5. Continue to the next section Mailing Defaults.

GROUP OPTIONS - MAILING DEFAULTS

Use this section of Group Options to determine mailing defaults for the group.



Mailing Defaults
Current server time is 12:41:51 PM

Default Advance Days:	0
Default Mail Lead Days:	0
Calendar Months Displayed on Mail/Termination Date Page:	0
Default Mail Type:	Standard
Default Effective Time:	12:01 A.M. Local Time
Mail Date Rollover Hour:	11:00 PM

1. Enter a number for the **Default Advance Days**. The number of days that will default on all notices not pre-filled by ODEN. (To set days notice by policy type, action and reason, see Custom Advance Days Notice).
2. Enter a number for the **Default Mail Lead Days**. The number of days added to the days notice to allow for mail time. This applies when the mail lead days are not pre-filled by ODEN.
3. Enter a number for the **Calendar Months Displayed on Mail/Termination Page**. The number of months graphically displayed for user convenience.
4. Select the **Default Mail Type** from the drop-down list. The company standard for the type of mailing – applies when mail type is not pre-filled by ODEN.
5. Select the **Default Effective Time** from the drop-down list. Set this per your policy provisions.
6. Select the **Mail Rollover Hour** from the drop-down list. The time of day the mail date will “rollover” to show the next available mail date.
7. Continue to the Notice Defaults section.

GROUP OPTIONS - NOTICE DEFAULTS

Use this section of Group Options to determine defaults for notices for the group.

Notice Defaults

Underwriter Required:	☐
Auto-Select Underwriter:	☐
Notice Counter:	Off
Default Text Action for Reason Description:	◉ No default. ○ Overwrite text in reason box with selected text. ○ Append selected text to text in reason box.
Disable Editing Reason Description:	☐
Two Percent Rule Checking:	Disabled
Allow Selecting Max Advance Days:	☐
Allow Selecting Max Mail Lead Days:	☐
Show Previous Cancellation Warning Message:	☐ Warn operator when cancelling or reinstating a policy that has previously been cancelled or non-renewed for underwriting reasons
State Rules and Regulations Access:	◉ Basic Mode (no Oden Online subscription required) ○ Premium Mode (requires Oden Online subscription)
State Rules and Regulations URL:	
Delete Task Files after:	1 Day
Show Search on Policy Locate Page:	☐
Rescission Notice Title:	
Disable Tick Marks:	☑
Embed Core Fonts:	☐

1. Check this option **Underwriter Required** so that a notice will not be generated unless an underwriter name is selected.

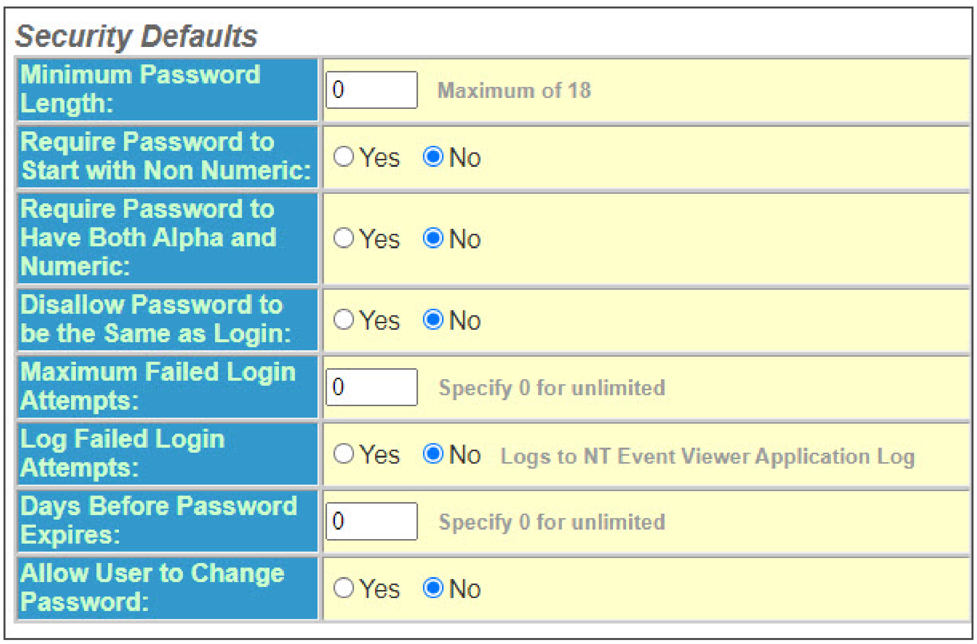
2. Select **Auto-Select Underwriter** if you want to allow the Users name, if the User is also entered as an Underwriter, to automatically default.
3. Toggle **Notice Counter** On or Off – This applies to ODEN clients who have USB dongles and pay by the notice. Click **Replace Dongle** button when the USB dongle has been replaced.
4. Select the option for **Default Text Action for Reason Description** that applies to this group. This controls how wording is changed or added to the Reason Description.
    a. **No default** – Text will overwrite anything previously entered.
    b. **Overwrite text in Reason box with selected text** - Text will overwrite anything previously entered.
    c. **Append selected text to text in Reason box** – Text will be added at the end of previously entered text.
5. Select the **Two Percent Rule Checking** from the drop-down list. This option determines if Policy Terminator is to track cancellation and nonrenwals in those states with the 2% rule.
    a. **Disable** – Disables the feature.
    b. **Loose** – Policy Terminator will alert the user that they have exceeded the number of notices but will allow the notice to be generated.
    c. **Strict** - Policy Terminator will alert the user that they have exceeded the number of notices and notices will not be generated.
6. Select **Allow Selecting Max Advance Days** if you want Policy Terminator to default the greater of the company advance days notice or the advance days notice pre-filled by ODEN.
7. Select **Allow Selecting Max Mail Lead Days** if you want Policy Terminator to default the greater of the company mail lead days notice or the mail lead days notice pre-filled by ODEN.
8. Select **Show Previous Cancellation Warning Message** if you want to warn the user that a previous cancellation or reinstatement notice has been issued.
9. Enter the **State Rules and Regulations URL** (Authentication Server Only) If applicable. The URL address is the direct access URL to the ODEN State Rules and Regulations from the Policy Terminator. Contact your IT Department for more information.
10. Select **Delete Task Files after** from the drop-down list. Set this to determine how long you want temporary task files to be available in the program.

11. Select **Show Search on Policy Locate Page** if you want the user to have **Policy Number** search and **Named Insured** search on the **Policy Locate** screen.

12. Continue to the next section Security Defaults.

GROUP OPTIONS - SECURITY DEFAULTS

Use this section of Group Options to determine **Security** defaults for the group.



Select the password criteria for your group from the following options:

1. Enter the **Maximum Password Length**. It can be up to 18 characters.

2. Select **Yes** or **No** to **Require Password to Start with Non-Numeric** character.

3. Select **Yes** or **No** to **Require Password to Have Both Alpha and Numeric** characters.

4. Select **Yes** or **No** to **Disallow Password to be the Same as Login**.

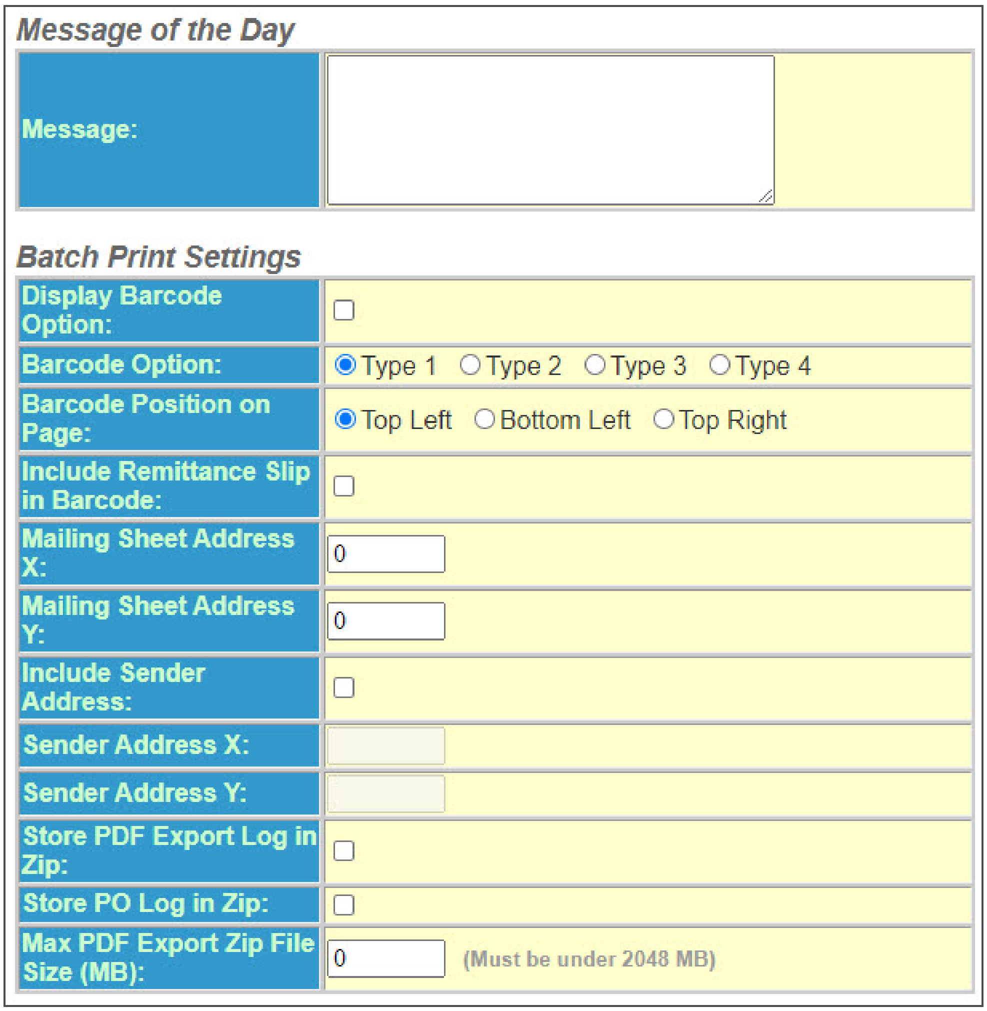
5. Enter a number for the **Maximum Failed Login Attempts**. Enter zero (0) for unlimited attempts.

6. Select the **Log Failed Login Attempts** option for your group – **Yes** or **No**.

7. Enter a value for **Days Before Password Expires**. Enter Zero (0) for no expiration.
8. Select the **Allow Users to Change Password** option that applies to your group – **Yes** or **No**.

GROUP OPTIONS - ADDITIONAL OPTIONS

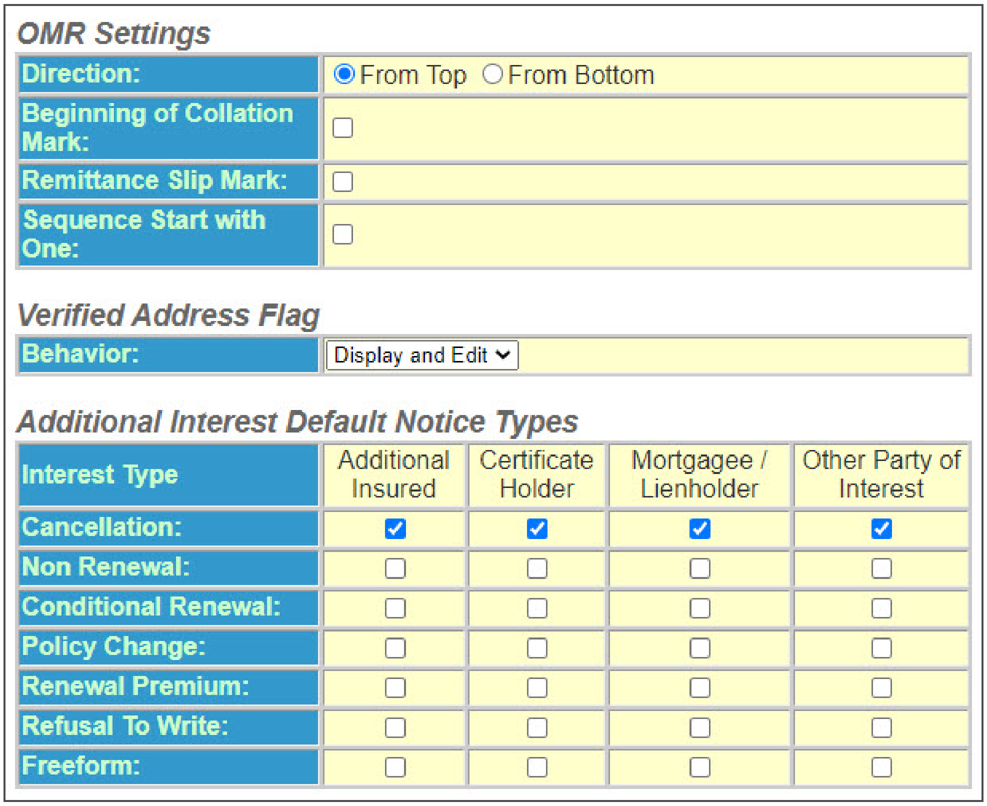
Use the following sections to define additional options for the group.



1. Enter the **Message of the Day**, if applicable. The message will be seen by all users who log in to the program.

2. Select the **Batch Printing Settings** that apply:
   - **Display Barcode Option** – Select this option to print the barcode above the address on the notice.
   - **Mailing Sheet Address X** – Determines the X coordinate for placement of the name and address on the mailing sheet.
   - **Mailing Sheet Address Y** – Determines the Y coordinate for placement of the name and address on the mailing sheet.
   - Select the **Include Sender Address** to print the address on the notice.
   - **Sender Address X** – Determines the X coordinate for placement of the name and address on the mailing sheet.
   - **Sender Address Y** – Determines the Y coordinate for placement of the name and address on the mailing sheet.
   - Select **Store PDF Export Log in Zip** to store the export log in a zip file.
   - Select **Store PO Log in Zip** to store the PO log in a zip file.
   - Enter a value for the **Max PDF Export Zip File Size (MB)**.

3. Select the **OMR Settings**, **Verified Address Flag** and **Additional Interest Default Notice Types** that apply. Policy Terminator defaults to send copies all cancellation notices to the Additional Interests. If you wish to default other notice copies to send to the Additional Interest, mark the notice types.



IMPORT SELECT TABLE

This screen is a descriptor that allows you to discriminate between the particular imports you create. It defaults to **Import and the current date**, but you can assign any name that allows you to identify it from other imports.

1. From the Main Menu, select **Utilities > Data Transfer > Import**.

2. Enter a **Description** for this task. By default it contains the following: "Import (Today's Date)". ODEN® recommends that users change the description to one that enables them to easily identify the task.

3. Select the **Import Table** from the drop-down list. The following list describes the available types:

   - **Auto Detect Data** - Attempts to automatically detect the type of import table. Use this option to avoid inadvertently importing a file of the wrong type into a table.

     > The first line of the import file must contain one of the following table names: Additional Interest, Consumer Reporting Agency, Branch, Policy, Producer or User Written. This import function is case insensitive.

   - **Additional Interest** - Imports the information into the Additional Interest table.(Insurance Type, Policy Number, Additional Interest Name 1 and Additional Interest Name 2.)

   - **Branch** - Imports the branch description information into the Branch table.

   - **Consumer Reporting Agency** - Imports the information into the Consumer Reporting Agency table. (Name 1)

   - **Policy** - Imports the policy number into the Policy table.

   - **Policies Written 2%** - Imports the information into the Policies Written 2% table for 2% Rule. (Carrier, Territory, State and Year)

   - **Producer** - Imports the producer number into the Producer table.

   - **Underwriter** - Imports the information into the Underwriter table. (Entire Record (Last Name, First Name))

   - **User** - Imports the information into the user table. (Login, User type, Group, Name, Email address, Phone)

4. Select from the following **Import Options**:

   - **Overwrite** - The existing information is overwritten with the import data. See the chart below for how the system determines a match. The comparison is done record by record.

     > The entire record is overwritten. Any data that existed in the original record and not specified in the import file is lost.

   - **Reject** - The existing information is maintained and the import record is written out to the log file. See the chart below for how the system determines a match.

   - **Replace** - Deletes all existing additional interests for a policy and loads the interests found in the import file. This option is solely applicable to Additional Interests.

     > Use this option in the event that the additional interests import file contains a completely new list of Additional Interests. This will ensure that any Additional Interests that may have been removed from the policy will not receive notices.

     > The case sensitivity of the match criteria depends on the case sensitivity setting of the database. If you are an ODEN® Internet customer then the match criteria is case insensitive. For ODEN® Intranet customers see your System Administrator for this information.

5. Click **Browse** to select the location of the file you are importing.

   Local File - A file located on a local drive of the Web Server.Enter into the Local File field a fully qualified path and file name.Example: C:\Windows\My Documents\Import.txt. In this case the file is located in the My Documents folder on the C drive of the Web Server.Network(UNC) \\Server1\Share1\Oden files\Import.txt (Mapped Drive) H:\ODENFiles\Import.txtYou must choose the local file option if you are scheduling a recurring import task. (See Schedule Type Help for a detailed description of scheduling tasks.)

   File Upload - A file located on a user's local or network drive.Enter into the Upload File field a fully qualified path and file name. It can be either a local drive or a network drive location. For network drives one can reference them by UNC or drive mapping.Example:Local - C:\Windows\My Documents\Import.txt - The file is located on the C drive of the user's workstation.Network(UNC) \\Server1\Share1\Oden files\Import.txt (Mapped Drive) H:\ODENFiles\Import.txtIf the path to the file to be uploaded is not known, use the Browse button to locate and select the file. Click on the Browse button to bring up the windows "Chose File" dialog box.Note: The user must have "Read" permissions for both the 'share' and 'file to be imported'.

6. Select the appropriate **Format** of upload file.

   Comma-delimited - This option specifies that commas separate the field values in the upload file. String values should be contained in double quotes.

   Fixed Width - This option specifies that the field values in the upload file are the same width as the destination fields of the import table. Spaces must right pad any difference between the data, and field length.Note: For more information on field length, see the File Layout section of help.

7. Select the appropriate **Data Options**. This defines the format of the first two lines of the import file.

   Table name present - Indicates whether or not a table name is included on the first line of the import file.Select this option if the import file contains the table name on the first line of the file. If Auto Detect Data is selected, this box is checked and disabled to prevent modification. Table name is a requirement for Auto Detect Data.

   Field names present - Indicates whether or not field names are included on either the first or second line of the import file.Select this option if the import file contains field names on the first line of the file, or if the Table Name Present option is selected and the second line of the import file contains field names.Note: The Field Name line, if present, is not parsed or validated in any way. It is merely included as a convenience to the user. Field order is dictated by the ODEN® defined Table Structures and is not affected by the Field Name line.

8. On the side menu, select **Run/Schedule Task**.

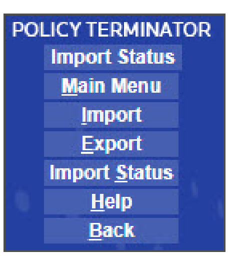
9. Select Import Status to see the import result.

Schedule Type

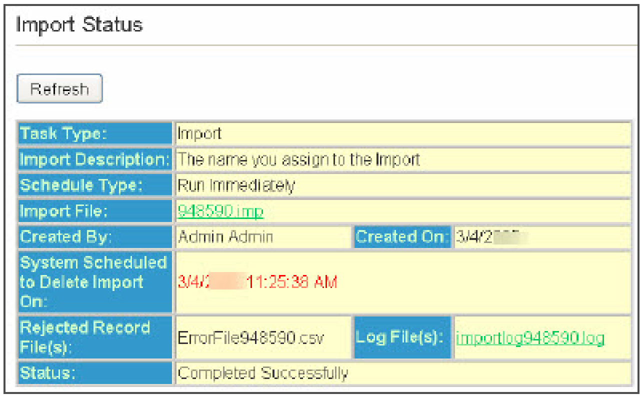
The **Schedule Type** section of the **Import** page displays for Intranet customers only. Click here for details.

IMPORT STATUS

From the **Data Transfer** menu, select **Import > Import Status**.



The **Import Status** page gives you the details about an imported file.



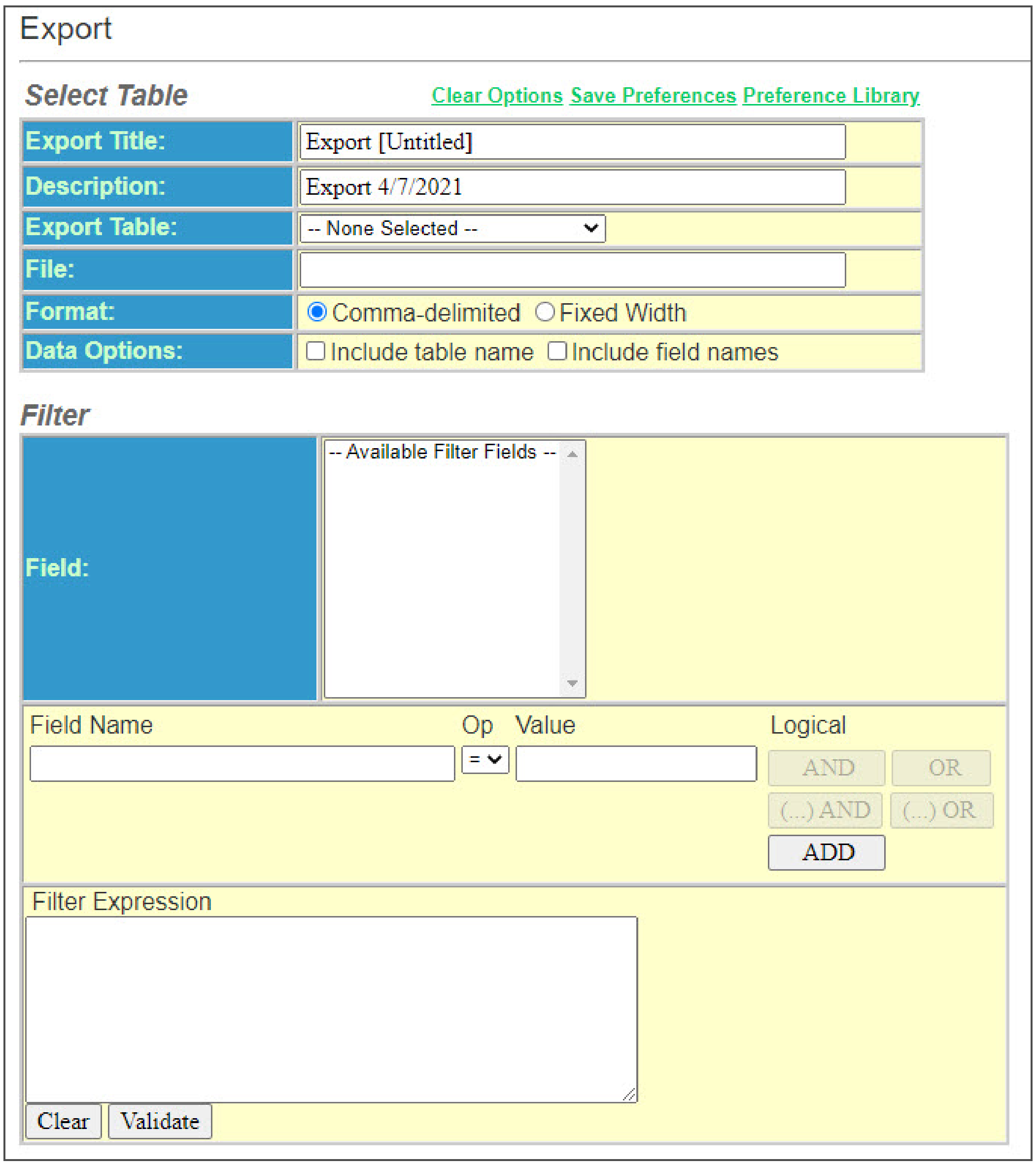
FIELD	DESCRIPTION
Task Type	Import, Export, Batch Print
Import Description	Import file name
Schedule Type	Run Immediately or for Intranet Client, whenever you have selected it to run.
Import File	A system generated number assigned to the import.
Created By	The name of the person who created the file.
Created On	The date the file was created.
System Scheduled to Delete Import On	When the file will no longer be available
Rejected Error(s) File	A log of any rejected or errors. Click the Log File hyperlink to see the information.
Status	The current status of the requested import.

Policy Terminator will build a file in a pdf format containing the selected import. If the File(s) field doesn't turn green and allow you to open the import file, click the **Status** button on the side menu or the **Refresh** at the top of the page.

EXPORT SELECT TABLE

This is a descriptor that allows you to discriminate between the particular exports you create. It will default to **Export and the current date**, but you can assign any name that allows you to identify it from other exports.

Use this page to set up and save export selections when exporting data.



1. Enter the **Export Title** for this set of export criteria.
2. Enter a **Description** for this task. By default it contains the following: "Export (Today's Date)". ODEN® recommends that you change the description to one that enables you to easily identify the task.
3. Select the **Export Table** from the drop-down list. This field displays the type of export to be performed.

TYPE OF EXPORT	DESCRIPTION
Additional Interest	Exports information from the Additional Interest table.
Branch	Exports information from the Branch table.
Consumer Reporting Agency	Exports information from the Consumer Reporting Agency table.
Notice	Exports information about Notices. One record per notice event.
Notice Copies	Exports infomation about individual notice copies. One record per notice recipient. Contains all information as the Notice export plus recipient specific information such as address.
Policy	Exports information from the Policy table.
Producer	Exports information from the Producer table.
Two Percent	Exports information from the User Policies Written table for 2% Rule.
Underwriter	Exports information from the Underwriter table.
User Notice	Exports information from the Notice table. Click here for more information on Notice Export.

4. Select **From and To Dates**. These fields display the limiting date range for the export and are only applicable to User Notice. To limit the export of notices by generation date enter a beginning and ending date.
5. Enter the name of the export file to be created. The export file is saved to the Web server and can be downloaded from the **Task Status** page. *Do not* specify a path for the file.

6. Select the export **File** format.

    - Comma-delimited - This option specifies that commas separate the fields in the export file. String values are contained in double quotes if they contain one or more commas.

    - Fixed Width - This option specifies that the field values in the export file are the same width as the fields in the native tables. Spaces right pad any difference between the data, and field length.Note: For more information on field length, see the File Layout section of help.

7. Select the **Data Options**. This defines the format of the first two lines of the export file.

    - Include table name - Indicates whether or not a table name is included on the first line of the export file. This option is useful if you plan to import this data into another group or PT server using the auto detect functionality.

    - Include field names - Indicates whether or not field names are included on either the first or second line of the file.

FILTER

A filter expression is a way to limit the records that are included in a report by specifying criteria. The Filter section contains the following fields:

Field - All of the fields available for use in the filter. When you select a filter it appends it to the Field Name field below.

Field Name - Displays the selection made from the above list.

Operator - This field contains a drop-down list of operators. Operators are typically used to compare the value of a field to some fixed specified value. Some operators in the list require special instructions:

=	equal to
<>	not equal
>	greater than
>=	greater than or equal to
<	less than
<=	less than or equal to

IN	Determines if a given value matches any value of a subquery or a list.
NOT IN	The given value does not match any value of a subquery or a list.
LIKE	Determines whether or not a given character string matches a specified pattern.
NOT LIKE	A given character string does not match a specified pattern.

The "LIKE" operator is similar to the equals operator except that it allows the right hand value to contain the wildcard "*". For example, the filter text:

sPolicyState LIKE "O*"

matches policies whose applicable law state is OH, OK or OR.

The "IN" operator allows one to specify a list of comma separated values enclosed in parenthesis. For example, the filter text:

sPolicyState IN ("OH","OK","OR")

matches policies whose applicable law state is OH, OK or OR.

The "NOT IN" operator allows one to specify a list of comma separated values enclosed in parenthesis that should specifically be excluded, For example, the filter text:

sPolicyState NOT IN ("OH","OK","OR")

matches policies whose applicable law state is anything except OH, OK or OR.

Value - Displays the user supplied criteria. In some cases the system provides a list of values for you to select from.

In some instances when appending a filter criteria to the filter expression you will notice that the system replaces your selected value with a numeric value. This is normal behavior. (For Example, User_Policy.iCreatedBy = 2)

Logical - Provides the simple Boolean operators AND and OR. To append your filter criteria to the filter expression box, select the appropriate logical operator. If nothing is in the filter expression the only valid button is Add. See Details below:

AND	Adds another field name to the filter expression to be considered. The system will poll the database for records that match both criteria.

OR	Adds another field name to the filter expression to be considered. The system will poll the database for records that match either criteria.
(...) AND	Adds a string(See AND)
(...) OR	Adds a string(See OR)
ADD	Adds the first field to the filter expression.

The (...)AND or (...)OR buttons when selected will apply parenthesis around the entire existing filter expression and append the new criteria to the end of the expression.

Filter Expression - Displays the actual SQL where clause.

Clear - Clears the entire filter expression.

Validate - Verifies the syntatical correctness of the filter expression.

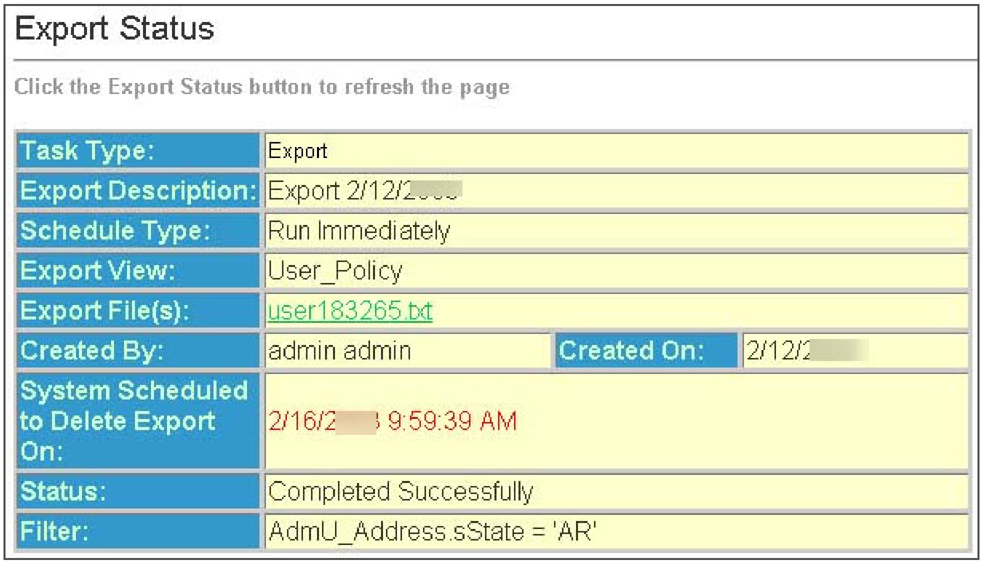
Schedule Type

The **Schedule Type** section of the **Reports** page displays for Intranet customers only. Click here for details.

EXPORT STATUS

This option displays the status of both processed or scheduled exports.

From the **Data Transfer** menu, select **Export > Export Status**.



FIELD	DESCRIPTION
Task Type	Displays the type of task
Export Description	Displays the description of the task and the current date.
Schedule Type	Displays the scheduling status.
Export View	Displays the table from which the export will occur.
Export File	Displays a link to the generated export file. The name of the link corresponds to the name entered in the "File" field when creating the export task. Clicking on the link allows viewing of the file. Right-clicking on the link, and choosing "Save Target As…" (or "Save As…"), saves the file to a local hard-drive as a text (.txt) file.
Created By	Displays the user who created the task.
Created On	Displays the date the task was scheduled.
System Scheduled To Delete Task On	Displays the scheduled date and time for task deletion if the task ran correctly. Recurring tasks are never deleted; however, the associated log and text files are deleted according to the group options setting Delete Task Files after XX Hours.
Status	Displays the task status. The following is a list of the valid status's:

Status Descriptions

STATUS	DESCRIPTION
Scheduled for processing	Task is in the queue, and will be processed as soon as possible.
Processing record X out of X	Task is executing and has processed X records out of X records.
Completed Successfully	Task executed with no warnings or errors.
Completed no records to process	Task did not execute because if no records to process.
Failed	Something fatal happened and the task was unable to execute at all.
Scheduled…	Is a recurring task that is scheduled to run at the specified date and time.

Filter - This field displays the filter expression that was used.

RENAMING POLICY TYPES

Use this screen to rename a policy type.

1. On the Main Menu, select **Utilities > Data Setup > Personal or Commercial Lines Setup**.

2. Select **Policy Types**.

Policy Types - Personal *READ ONLY*

No Policy Types - Personal Selected

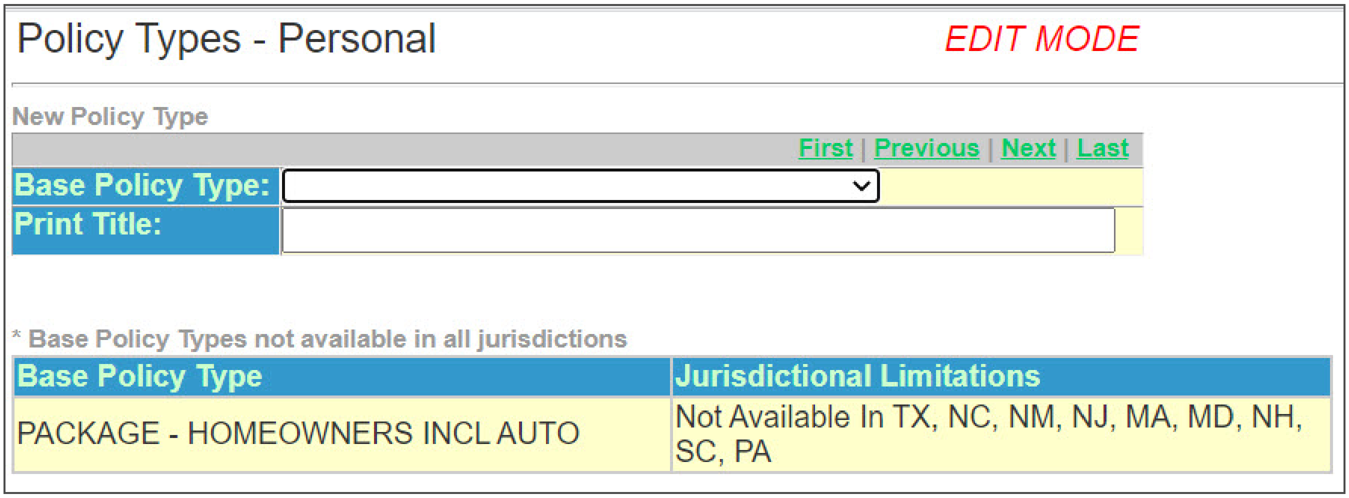
15 Policy Types - Personal Exist

View	Edit	Base Policy Type	Print Title
Top of List			
		AUTO LIABILITY AND PHYSICAL DAMAGE	AUTO LIABILITY AND PHYSICAL DAMAGE
		AUTO PHYSICAL DAMAGE	AUTO PHYSICAL DAMAGE
		AVIATION - LIABILITY OR HULL	AVIATION - LIABILITY OR HULL
		BOATOWNERS	BOATOWNERS
		FARM OWNER - RANCH OWNER	FARM OWNER - RANCH OWNER
		HOMEOWNERS	HOMEOWNERS
		INLAND MARINE FLOATER	INLAND MARINE FLOATER
		MOBILE HOME	MOBILE HOME
		MOTORCYCLE	MOTORCYCLE
		MOTORHOME	MOTORHOME
		PACKAGE - HOMEOWNERS INCL AUTO	PACKAGE - HOMEOWNERS INCL AUTO
		PERS GENERIC - CALL ODEN BEFORE USING	PERS GENERIC - CALL ODEN BEFORE USING
		STANDARD FIRE	STANDARD FIRE
		TENANT OR RENTERS	TENANT OR RENTERS
		UMBRELLA/EXCESS LIABILITY	UMBRELLA/EXCESS LIABILITY
End of List			

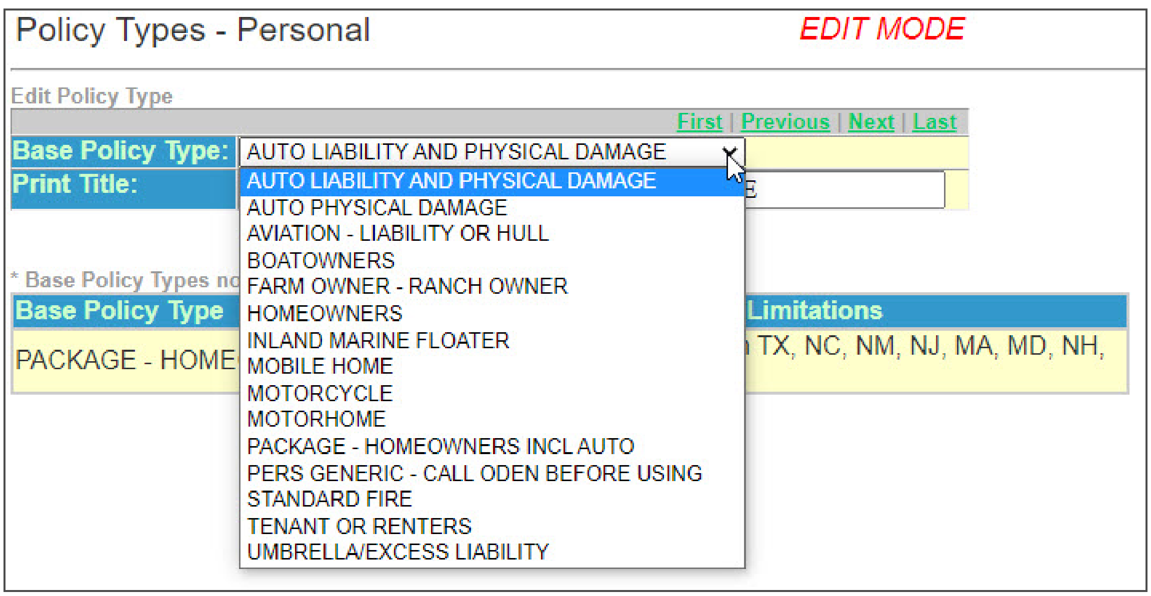
* Base Policy Types not available in all jurisdictions

Base Policy Type	Jurisdictional Limitations
PACKAGE - HOMEOWNERS INCL AUTO	Not Available In TX, NC, NM, NJ, MA, MD, NH, SC, PA

3. On the side menu, select **Add New**.



4. Select the **Base Policy Type** from the drop-down list. The policy type that has been researched by our research department. You must select the correct Base Policy Type to produce a compliant notice.



5. Enter the **Print Title**. The name of the policy type you have selected.

6. Complete the Information.

7. On the side menu, select **Save/Return**.

8. Your new policy type is now in the list and you can select it when producing a notice.

CREATING USER-DEFINED FIELDS

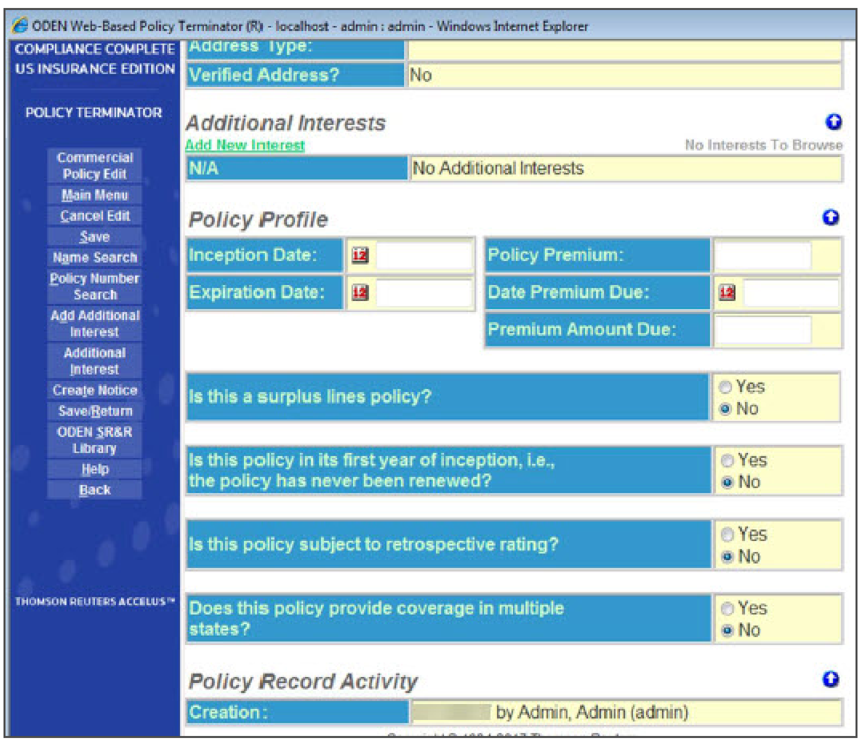
User-Defined Fields (UDF) are additional fields that you can add and then use to track information not captured in the existing Policy Terminator program. Once you create these labels, a new field will appear on the **Policy Information** page and you can enter data into them.

You can set them up in two ways:

- You can use them to filter data in the batch/p.o. log; policy locate or reports.
- You can use them to insert data not captured by the policy terminator that you may want to appear on the notice. This could include the VIN, the name of a program or a property description.

1. On the Main Menu, select **Utilities > Security > Group Options**.

   Once you create the User-Defined Field in **Group Options**, they will appear at the bottom of the **Policy Information** screen and you can enter the appropriate information.



Examples:

User-Defined Field 1 Label: **Program.** When the operator is entering data he/she will have the opportunity to enter the name of a specific program. (i.e. Hardware Stores, Oil Lease Operators, Recreational Vehicles.)

User-Defined Field 2 Label: **Department**. If information about the specific department issuing the notice is entered, Management will be able to produce reports based on what terminations are coming out of what department.

HOW TO CREATE USER-DEFINED FIELDS

1. On the Main Menu, select **Utilities > Data Setup > General Policy Setup**.
2. Select **User-Defined Fields**.
3. On the side menu, select **Edit**.
4. Create new labels or view existing ones.