

Julian Harris Intranet - User Manual

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1. Accessing the Intranet

The Intranet website can be accessed via:

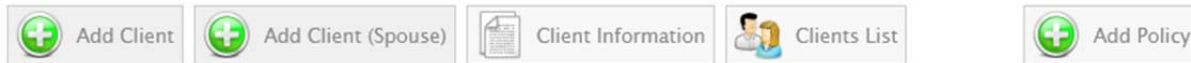
<http://intranet.julianharris.net>

Once there you login using your email address and password, if you haven't set up a password, ask your manager to assign one, this can be changed by you when you login.

2. Adding a New Client



To add a new client, select the **Client** tab and then select **Add Client** from the link bar. Once completed select **Save**, you will then be presented with a summary of the information entered and buttons at the bottom of the page.



Add Client

This allows you to add another client as done previously.

Add Client (Spouse)

When adding a spouse it is quicker to select the Add Client (Spouse) button as the form will be pre-filled with the Title, Surname, Address and Home Phone Number of the client previously saved.

Client Information

By selecting Client Information you'll be taken to the Client page, allowing you to add a policy or change the information entered for the client.

Client List

The client list is a list of all clients.

Add Policy

Allows you to add a policy for the client.

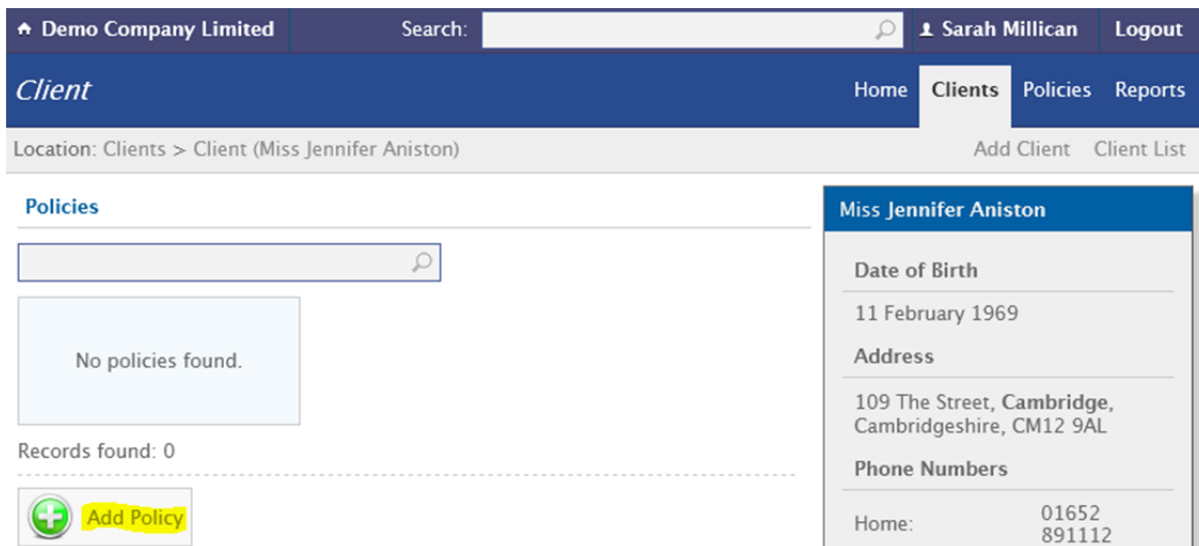
3. Adding a Policy

There are a number of ways of adding a new policy.

Adding a Client

When you've added a new client (as described in section 2) you have an option to **Add Policy**, this will then create a new policy with the client already assigned.

Client Information



The screenshot shows a web application interface for a client named Miss Jennifer Aniston. The top navigation bar includes 'Demo Company Limited', a search bar, and the user 'Sarah Millican' with a 'Logout' link. The main navigation tabs are 'Client', 'Home', 'Clients', 'Policies', and 'Reports'. The current page is 'Client Information' for Miss Jennifer Aniston, with a breadcrumb 'Location: Clients > Client (Miss Jennifer Aniston)' and links for 'Add Client' and 'Client List'. The 'Policies' section is empty, showing 'No policies found.' and 'Records found: 0'. A yellow 'Add Policy' button is located below the policy list. The client's details are shown on the right, including Date of Birth (11 February 1969), Address (109 The Street, Cambridge, Cambridgeshire, CM12 9AL), and Phone Numbers (Home: 01652 891112).

When viewing a client's information, under the list of policies, you can select **Add Policy**, this will then create a new policy with the client already assigned.

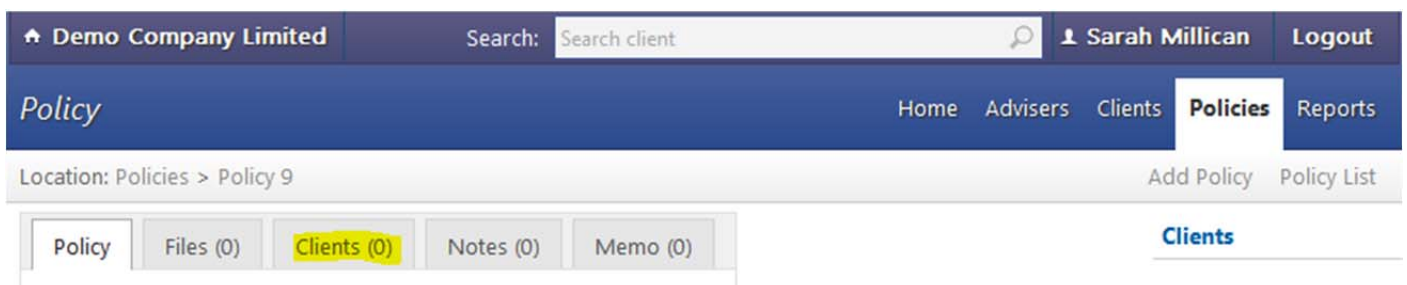
Add Policy



The screenshot shows the 'Add Policy' page in the web application. The top navigation bar includes 'Demo Company Limited', a search bar, and the user 'Sarah Millican' with a 'Logout' link. The main navigation tabs are 'Policies', 'Home', 'Clients', 'Policies', and 'Reports'. The current page is 'Add Policy', with a breadcrumb 'Location: Policies' and links for 'Add Policy' and 'Policy List'. The 'Add Policy' button is highlighted in yellow.

To add a new policy, select the **Policies** tab and then select **Add Policy** from the link bar.

When adding a policy using this method, you are creating a policy without the client information. Once the policy is created you will then need to add client(s) to the policy.



The screenshot shows the 'Policy' page in the web application. The top navigation bar includes 'Demo Company Limited', a search bar with 'Search client', and the user 'Sarah Millican' with a 'Logout' link. The main navigation tabs are 'Policy', 'Home', 'Advisers', 'Clients', 'Policies', and 'Reports'. The current page is 'Policy 9', with a breadcrumb 'Location: Policies > Policy 9' and links for 'Add Policy' and 'Policy List'. The 'Clients (0)' button is highlighted in yellow. Below the navigation bar, there are buttons for 'Policy', 'Files (0)', 'Clients (0)', 'Notes (0)', and 'Memo (0)'. The 'Clients' tab is also visible on the right side of the page.

Select the **Clients** tab, then **Add Client**.

Policy

Files (0)

Clients (0)

No clients found.

Records found: 0



Add Client

4. Policy Data Entry

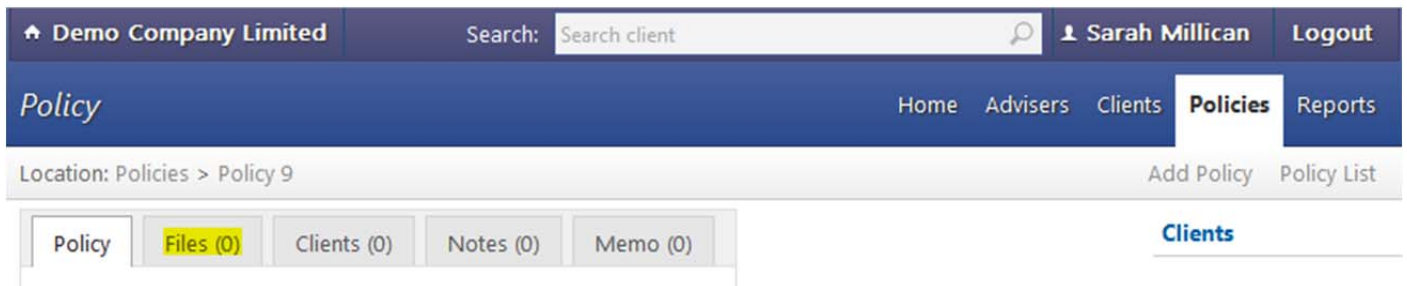
Edit Policy Home Advisers Clients **Polices** Reports

Location: Policies > Policy 17 > Edit Add Policy Policy List

Adviser	<input type="text" value="N/A"/>	Submitted To Provider Date	<input type="text" value="01/01/2000"/>
Product Type	<input type="text" value="N/A"/>	Product	<input type="text" value="N/A"/>
Provider	<input type="text" value="N/A"/>	Plan Number	<input type="text" value="Policy Number"/>
Mortgage Offer Date	<input type="text" value="01/01/2000"/>		
Start Date	<input type="text" value="01/01/2000"/>	Term (years)	<input type="text" value="5"/>
Amount Advanced	<input type="text" value="£100,000"/>		
Acceptance Received	<input type="text" value="01/01/2000"/>	Acceptance Sent	<input type="text" value="01/01/2000"/>
Policy Received	<input type="text" value="01/01/2000"/>	Policy Sent	<input type="text" value="01/01/2000"/>
Single Premium	<input type="text" value="£50.00"/>	Monthly Premium	<input type="text" value="£50.00"/>

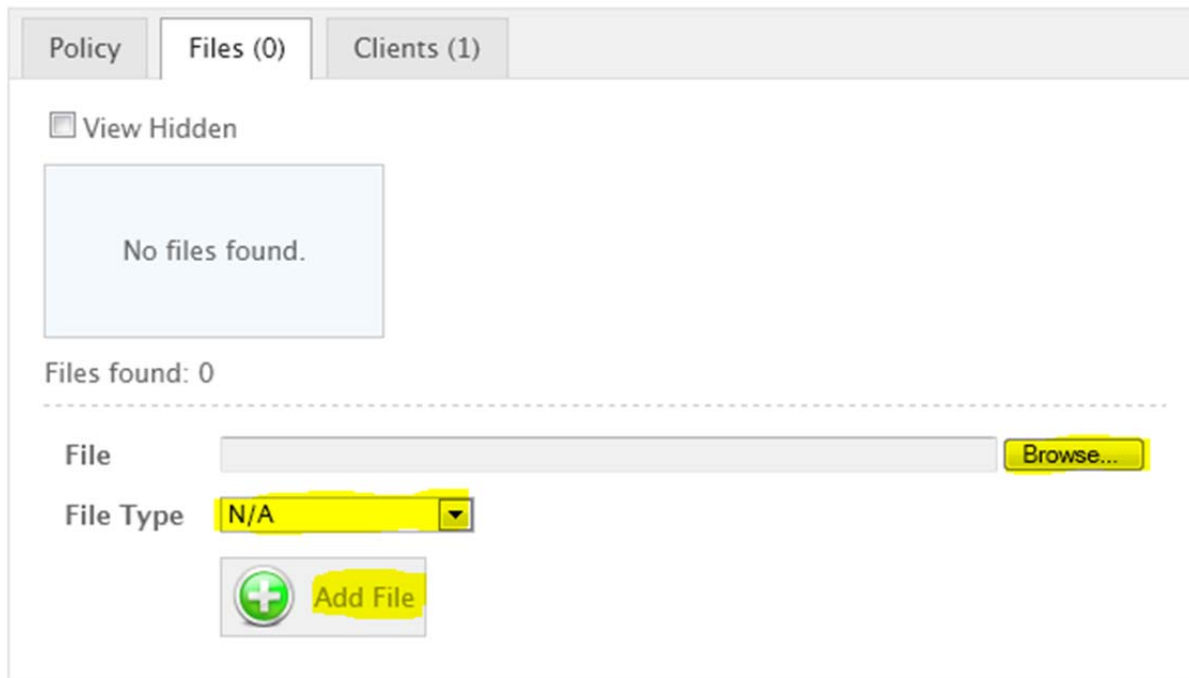
If the provider isn't shown on the Provider list, please email Donna, and the list will be updated.

5. Adding Files to the Policy



The screenshot shows the top navigation bar of a web application. On the left, it says 'Demo Company Limited'. In the center, there is a search bar with the text 'Search client'. On the right, the user's name 'Sarah Millican' and a 'Logout' button are visible. Below the navigation bar, there is a 'Policy' header and a menu with options: 'Home', 'Advisers', 'Clients', 'Policies' (which is highlighted), and 'Reports'. Below the menu, the location is shown as 'Location: Policies > Policy 9'. On the right side of this section, there are links for 'Add Policy' and 'Policy List'. At the bottom of the screenshot, there is a tabbed interface with 'Policy', 'Files (0)', 'Clients (0)', 'Notes (0)', and 'Memo (0)'. The 'Files (0)' tab is highlighted in yellow. To the right of this tabbed interface, there is a 'Clients' link.

To add files to a policy, select the **Files** tab.



The screenshot shows the 'Files' tab interface. At the top, there are tabs for 'Policy', 'Files (0)', and 'Clients (1)'. Below the tabs, there is a checkbox labeled 'View Hidden'. A large light blue box contains the text 'No files found.' Below this, it says 'Files found: 0'. There is a dashed line separating the search area from the file upload area. In the file upload area, there is a 'File' input field with a 'Browse...' button to its right. Below the input field, there is a 'File Type' dropdown menu currently set to 'N/A'. At the bottom of the file upload area, there is a green plus icon in a circle followed by an 'Add File' button.

Browse for the file you wish to upload, select the **File Type** and then **Add File**.

Multiple File Upload




If your browser supports multiple files, you can select multiple files using either the *Shift* or *Alt* button on your keyboard once you've clicked the browse button. After clicking the **Add File** button you will be presented with a list of files uploaded, which you'll be able to choose the file type for.

Converting documents to Adobe PDF format

There are two ways to convert your documents to Adobe PDF.

1. If you are using Microsoft Office 2010 you can choose the type **PDF (*.pdf)** when you click **Save As**. For Microsoft Office 2007 you can download an [Add-in](#) which gives you the same function.
2. [PrimoPDF](#) is a free PDF print driver. Once you have installed it, you will then be able to **Print** in any program and select the **PrimoPDF printer**. Once chosen you'll then be provided with an option to save the file.

6. Removing Files from the Policy

	Type	Name	Size	Date Added		
	Com	Trigold.pdf	13	27/09/2011 13:14		

To remove a file from the policy, click the **Edit Button**.

On the Edit File page, click the **Hidden** checkbox and then **Save**. This will remove the file from the policy.

7. Adding Notes to the Policy

Demo Company Limited Search: Search client Sarah Millican Logout

Policy Home Advisers Clients **Policies** Reports

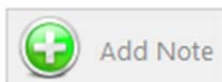
Location: Policies > Policy 9 Add Policy Policy List

Policy Files (0) Clients (0) **Notes (0)** Memo (0)

[Clients](#)

To add note to the policy, select the **Notes** tab.

Note



Type the note and then click **Add Note**.

8. Sending a Memo about the Policy

The screenshot shows a web application interface. At the top, there is a header bar with the company name "Demo Company Limited", a search bar with the text "Search client", and the user name "Sarah Millican" with a "Logout" link. Below the header is a navigation bar with the word "Policy" on the left and "Home", "Advisers", "Clients", "Policies", and "Reports" on the right. The "Policies" tab is currently selected. Below the navigation bar, there is a breadcrumb trail "Location: Policies > Policy 9" and two links: "Add Policy" and "Policy List". A tabbed interface is visible with tabs for "Policy", "Files (0)", "Clients (0)", "Notes (0)", and "Memo (0)". The "Memo (0)" tab is highlighted in yellow. To the right of the tabs, there is a link for "Clients".

To send a memo, select the **Memos** tab.

To

Memo

 Send Memo

Select the person who you wish to send the memo to, type the memo and then click **Send Memo**.

9. Receiving Memos

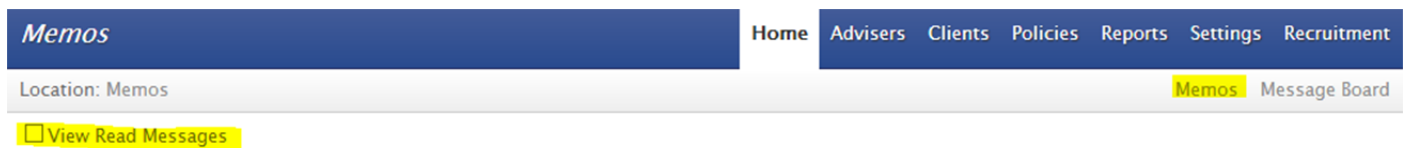


When a memo has been sent to you, your name will be replaced at the top of the screen with the number of memos waiting.



Click the “Memo found” message to be presented with a list of policies with memos unread.

Read Memos



To review previously read messages, click the **Memos** link and then select **View Read Messages**.

10. Policy Status

Each policy starts with a status of Incomplete (■).

For the policy to progress to a status of Compliance (■), the required data needs to be inputted and files uploaded. A list of required data and files will be shown in the To Do List shown when viewing a policy.

Once a policy status is at Compliance (■), some data and files may still be required, this again will be shown in the To Do List. Once the policy has been checked by Compliance Officer and all data and files received the policy will change to Completed (■).

If you are entering a policy that doesn't require compliance checking, for instance an agency switch, where you would like to use the system for reconciling your renewal commission, you can mark the policy as Archive (■). To do this you need to click the **Archive Policy** button on the **Edit Policy** page.

To cancel a policy, click the **Cancel Policy** button on the **Edit Policy** page. This will then change the status of the policy to Cancelled (■).

11. Policies with work outstanding

Demo Company Limited
Search: Search client
Sarah Millican
Logout

Outstanding
Home
Advisers
Clients
Policies
Reports
Settings
Recruitment

Location: Reports > Outstanding Outstanding

To review a list of policies that are requiring files or further information, select the **Reports** tab and then the **Outstanding** link.

2556 21/05/2012		Ms Angelina Jolie Mr Brad Pitt	<u>Details:</u> Clients Product Type Product Provider Application Date Premium Term	<u>Details:</u> Plan Number Start Date Acceptance Received Date Acceptance Sent Date Policy Received Date Policy Sent Date	
2554 21/05/2012	Further Advance	Ms Angelina Jolie Mr Brad Pitt	<u>Details:</u> Application Date Premium Term Amount Advanced Rate Rate Type <u>Files:</u> Factfind / Addendum Terms of Business / IDD Comparisons / Research KFI - Interest/Repayment/Part & Part Application Form Proof of Income Interest Only Declaration Suitability Report / Demands & Needs	<u>Details:</u> Plan Number Mortgage Completion Date <u>Files:</u> Customer Satisfaction Questionnaire Mortgage Offer	

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