# Genoa
# User Guide

Using the System
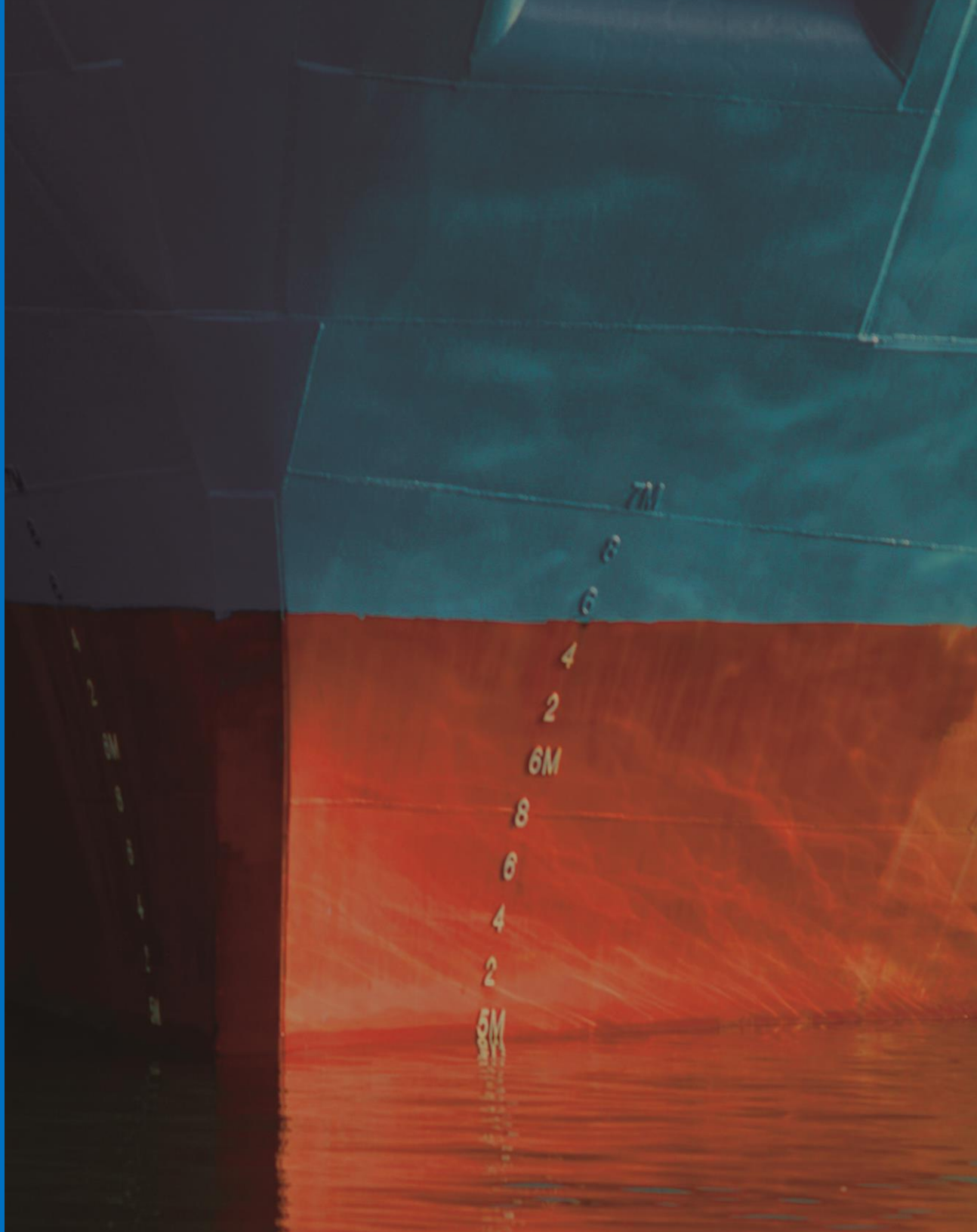
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An Insurity Company

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# Using the System

This guide is for all types of users, detailing the common features throughout the system.

Access to all data and features in the system are controlled by each user account.  The type of account you have, and the security rights and roles assigned to it, will affect the following:

- The ability to see and use certain features and system modules
- The ability to view, create, edit, or delete data.
- The ability to see and use data created by other users.  You should always be able to use data you created yourself, unless your account has been changed to remove access.

This guide describes the following common controls:

Calendar Lookups                          Selecting precise dates from the built-in calendars

Include/Exclude Controls                  Selecting options between included and excluded lists

Grids                                     Filtering and sorting large amounts of data using the
                                          grid tables

# Common Controls

This guide describes some of the user interface controls used to build each screen.

## Using a Calendar Lookup

The Calendar feature appears throughout the system, marked with the ⊞ icon.  You can manually type the corresponding text box or select it by using the Calendar lookup.
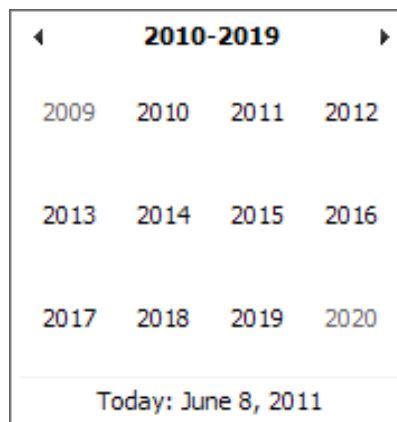
1.  Click the lookup icon ⊞ to open the calendar.

|  | June, 2011 |  |  |  |  |  |
|---|---|---|---|---|---|---|
| Su | Mo | Tu | We | Th | Fr | Sa |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |

Today: June 8, 2011

2.  Go forward or back one month at a time using the arrows in the top right and left corners.

3.  To select a specific month, click the month and year at the top of the window.  The Month Selection opens.

```
      ◄           2011           ►

      Jan     Feb     Mar     Apr


      May     Jun     Jul     Aug


      Sep     Oct     Nov     Dec

            Today: June 8, 2011
```

4.  Go forward or back one year at a time using the arrows in the top right and left, then click the month to select it.

5.  To select a specific year, click the year at the top of the window.  The Year Selection opens.

```
      ◄         2010-2019         ►

      2009    2010    2011    2012


      2013    2014    2015    2016


      2017    2018    2019    2020

            Today: June 8, 2011
```

6.  Go forward or back ten years at a time using the arrows in the top right and left, then click the year to select it.

7.  At any time, the Today link at the bottom of the window returns to the current date.

8.  Click the day in the calendar to close the window and insert that date in the field.

> **Tip:** Due to differences in international date formats, entering a date manually in the wrong format could result in an incorrect date.  Using the calendar lookup ensures that the correct date is being entered.

# Using Include/Exclude Controls

The Include/Exclude control is made up of two windows.  The left window is the Exclude window, and all options within that window are not selected. The right window is the Include window, and all options within that window are selected.
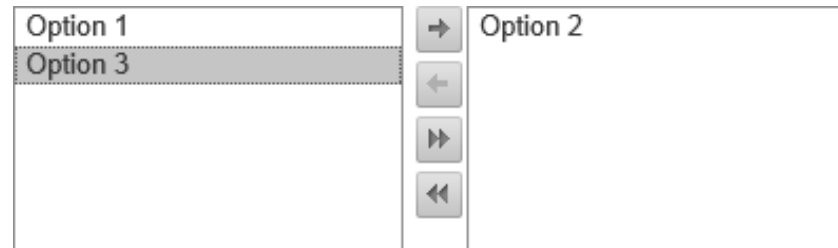


Options are transferred from left to right or right to left by highlighting them and clicking the arrows between the boxes.

Moves the highlighted options from Excluded to Included.

Moves the highlighted options from Included to Excluded.

Moves all Excluded items to Included.

Moves all Included items to Excluded.

# Selecting Multiple Options Using Keyboard Shortcuts

To highlight multiple options which do not appear consecutively within the list:

- Hold the **Ctrl** key and click each option within the list you wish to select

To highlight a range of options:

- Click one option then hold the **Shift** key and click the option at the other end of the range. All options in between will be highlighted.

- To select or deselect individual options, hold the **Ctrl** key and click each option.

# Using Grids

While some screens include simple tables of data that can be sorted by clicking the header, other screens may have multiple pages of detailed information that requires specific control. This is achieved using the advanced filter and sorting options of the grid.

> **Note**: Not all features are enabled for all grids

## Filtering Data

The filter option ▼ can be used to filter the data in a column, displaying entries that match or do not match a specified option or text.

> **Tip:** If the filter options are not shown, right click any column header and select **Filter Bar** from the menu.

1. Click the filter icon ▼ to open the filter menu. The available options depend on the type of data in the column you selected.
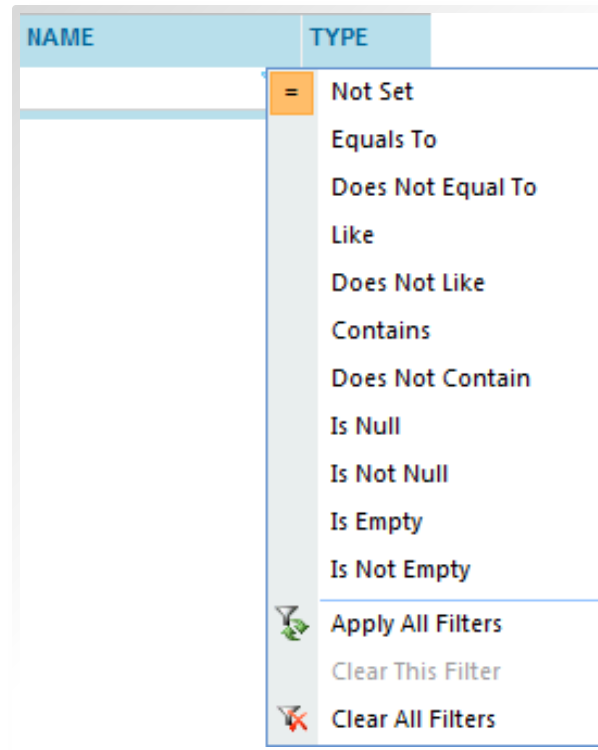
| Not Set | No filter is applied to the column. |
|---|---|
| **Greater Than** | For dates and numerical values, displays entries that exceed the filter value. |
| **Greater Than or Equal To** | For dates and numerical values, displays entries that match or exceed the filter value. |
| **Less Than or Equal To** | For dates and numerical values, displays entries that match or are less than the filter value. |
| **Less Than** | For dates and numerical values, displays entries that are less than the filter value. |
| **Equals To** | Only displays entries that match the filter text exactly. |
| **Does Not Equal To** | Only displays entries that do not match the filter text exactly. |
| **Like** | Displays all entries that start with the filter text. |

| | |
|---|---|
| **Does Not Like** | Displays all entries that do not start with the filter text. |
| **Contains** | Displays all entries that contain the filter text. |
| **Does Not Contain** | Displays all entries that do not contain the filter text. |
| **Is Null** | Displays entries that do not include the field being filtered. |
| **Is Not Null** | Displays entries that include the field being filtered, even if that field is empty. |
| **Is Empty** | Displays entries that include the field being filtered, but the field is empty. |
| **Is Not Empty** | Displays entries that contain any value in this column. |
| **Apply All Filters** | If the data has been changed, this option refreshes the filters. |
| **Clear This Filter** | Clears the filter text and sets the filter type to Not Set. |
| **Clear All Filters** | Clears all filter text on the current page and sets all filter types to Not Set. |

2. Click in the space to the left of the filter icon to enter the filter text.  Results are displayed based on the chosen filter type in relation to this text.  If no filter has been selected, a default filter is applied, suitable to the type of data in the column.  If the column is for dates, then a calendar lookup can be opened using the down arrow icon ⌄.
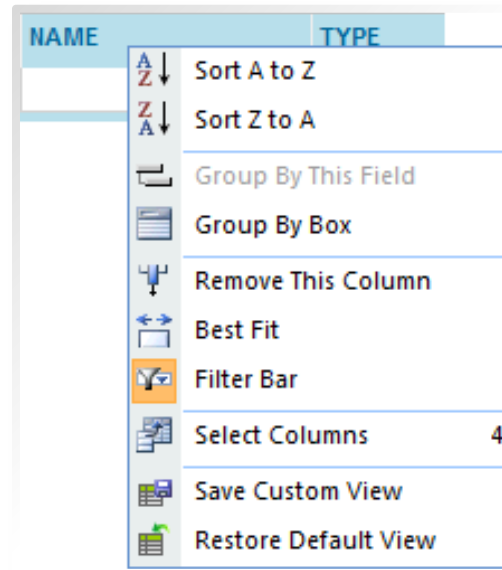


3. Press **Enter** after you enter the filter text and the filter is applied. You can modify the filter text and filter type as needed to locate the required entries.

# Sorting Data

You can click the header of a column once to sort the data in ascending order, marked by an up arrow ▲. If you click the column again, the system sorts by descending order, marked by a down arrow ▼. If you click the column header a third time, the system removes the sorting, restoring the data to its default order.

You can also right-click any column header to access the sorting options.

| NAME | TYPE |
|------|------|
| A↓ | Sort A to Z |
| Z↓ | Sort Z to A |
| ⊐ | Group By This Field |
| ▤ | Group By Box |
| ⊤ | Remove This Column |
| ↔ | Best Fit |
| ⊽ | Filter Bar |
| ⊞ | Select Columns    4 |
| ⊞ | Save Custom View |
| ⊟ | Restore Default View |

**Sort A to Z**                    Sorts the column in ascending order.

**Sort Z to A**                    Sorts the column in descending order.

# Navigating Multiple Pages of Data

If the data in a grid extends to multiple pages, the navigation buttons in the bottom right of the table can be used to move from page to page.

<div align="center">

⏮ ◀ Page 2 of 8 ▾ ▶ ⏭

</div>
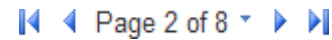
1. Go to the beginning or end of the list using the First Page or Last Page buttons. ⏮ ⏭

2. Move forward or backward one page at a time using the Previous Page or Next Page buttons. ◀ ▶

3. Click the down arrow next to the page number to jump directly to a specific page.

<div align="center">

⏮ ◀ Page 2 of 8 ▾ | Page 1
                   | ● Page 2
                   | Page 3

</div>
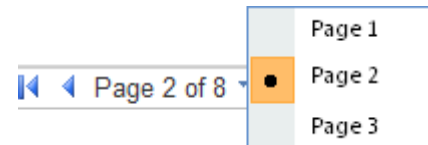
# Customizing the Grid

You can adjust the grids to suit your personal preferences.  You can set the width of the columns, the order of the columns, and even which columns to include.

- To manually adjust the width of the columns: click on a dividing line between the column headers and drag it left or right to the desired width.

- To automatically widen a column: right-click on the column header and select **Best Fit**.  The column widens to fit the longest entry in that column.

- To change the order of the columns: click the column header you wish to move and drag it to the preferred location within the grid.

- To quickly remove a column: right-click on the column header and select **Remove This Column**.

- To choose which columns to include or exclude (There are sometimes additional columns of data you can include in the grid that do not appear by default):

    1. Right-click on any column header and choose **Select Columns**.  A list of available columns expands.
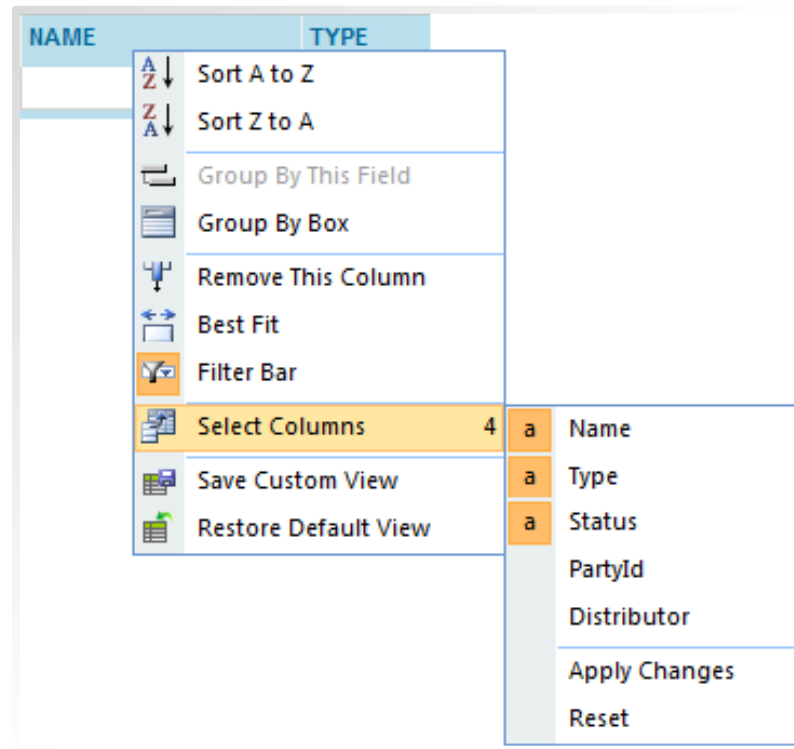


    2. Select or de-select any columns, then choose **Apply Changes**.  The grid is refreshed with the chosen columns.

    3. Choose **Restore Default View** to return the grid to its default configuration.

# Saving Custom Grid Configurations

Once you have customized the grid, the changes will persist until you close the browser session.

- To save your custom configuration so that it is applied each time the system displays that grid:

1. Right-click on any column header

2. Click **Save Custom View** to save your configuration.

- If you have the appropriate rights and access, you can save the current configuration for all the users of your site:

  1. Right-click on any column header.

  2. Click **Save Site Custom View** to save the configuration. Any users who do not have a custom view or session view configured will see the grid with the site view you defined. All users can still change the grid themselves and save their personal configuration instead.

  3. Click **Delete Site Custom View** to remove the saved site custom view settings.

- To delete your custom view and return to the saved site custom view, or return to the default system configuration if no site custom view exists:

  1. Right-click on any column header.

  2. Choose **Restore Default View**.

> **Notes:** You can save or reset custom configurations for one grid without affecting the other grids within the system. The settings for each grid are maintained separately. However, the settings are applied for the same grids accessed through different portals.
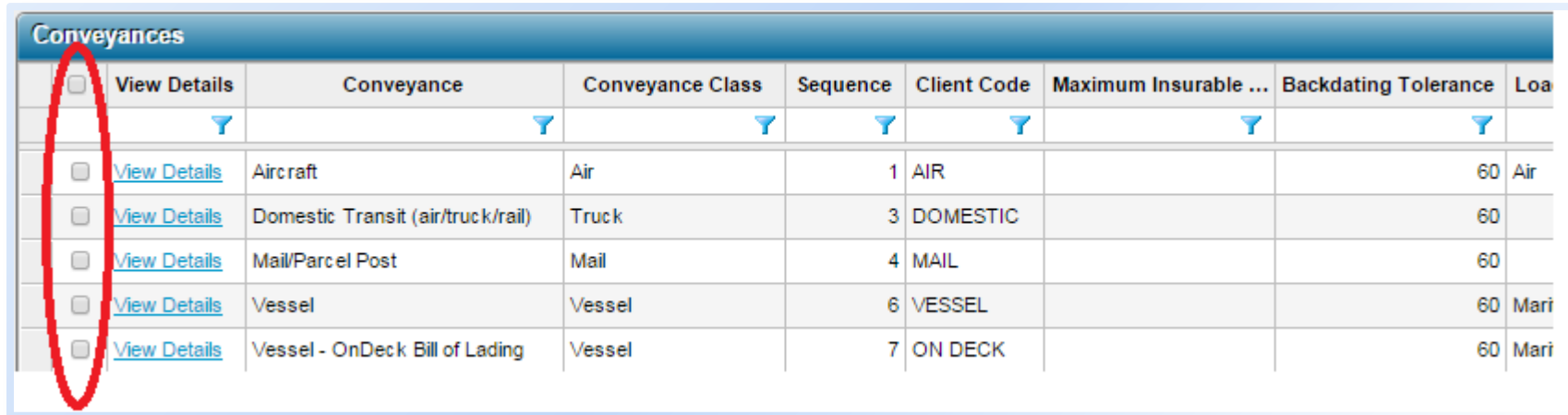>
> Some grids within the system cannot be customized. Right-clicking the header does not open the configuration menu.
>
> Deleting a site custom view or restoring the default view will not take effect until you refresh the grid. If a session view exists, the changes will take effect the next time you login.

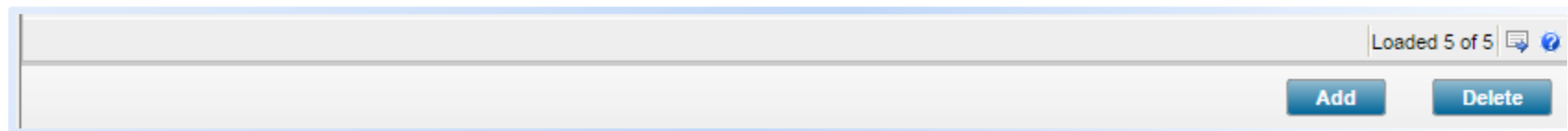# Deleting Multiple Grid Rows in Batch

You can delete one or more entries from the grid at the same time, without having to manage each item separately.

1. Check the selector checkbox (in the grid's first column) for each list item you wish to delete.



2. Click [**Delete**].



**Result**

The system deletes the selected items from the policy and removes them from the list.

> **Note**: When deleting multiple items from a list, if one or more items cannot be deleted (due to data constraints or because it has been used elsewhere in the system), the system deletes the items it can and notifies you about the specific items it cannot.

# Exporting Grid Data

You can export the content of a grid in a variety of formats. The content of the grid is exported as it appears, so columns can be added, removed, and reorganized, and all data can be filtered and sorted before you export the data. The export includes the information as it is displayed.  If there is more than one page of data, the data from all pages is included.

Once the data is ready for export:

1.   Click the **Export Grid** button 🖳 in the bottom right of the grid to view the export options.
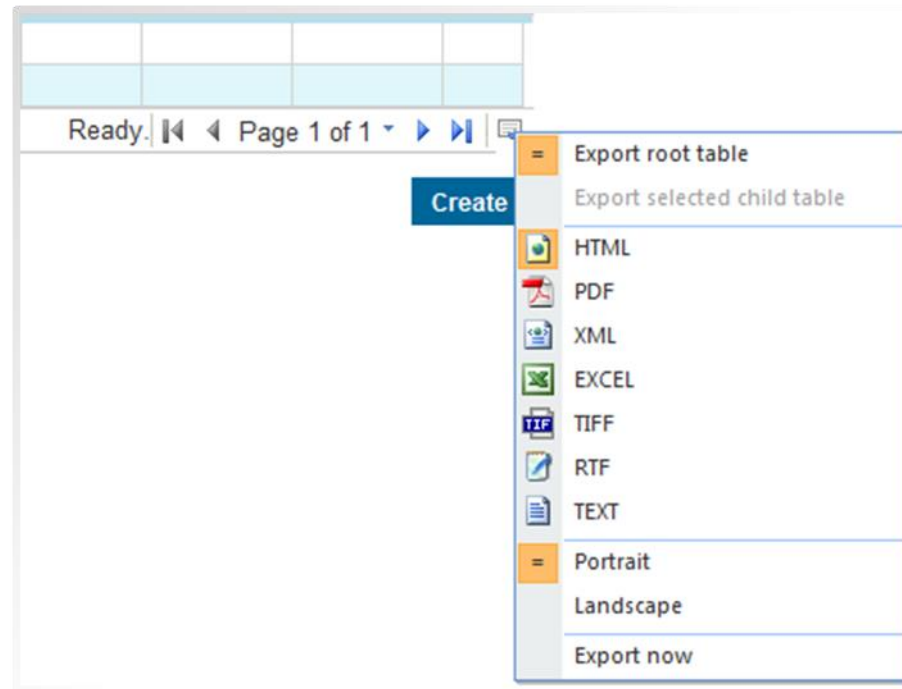


| **Export root table** | This option is selected by default and cannot be changed. |
| **Export selected child** | This option is unavailable. |

**table**

| | |
|---|---|
| **HTML** | Exports the data into a new browser window. |
| **PDF** | Exports the data as a PDF file that opens in a new browser window. |
| **XML** | Exports the data in XML format into a new browser window. |
| **EXCEL** | Generates an Excel file that can be saved or opened. |
| **TIFF** | Generates a graphic file in TIFF format that can be saved or opened. |
| **RTF** | Generates an RTF file that can be saved or opened. |
| **TEXT** | Exports the data in Txt format into a new browser window. |
| **Portrait / Landscape** | If the selected export format supports page formatting, this option defines if the output should be in portrait or landscape orientation. |

2. Click **Export Now** to export the grid data with the selected settings. For formats that generate a file, a standard Save / Open dialogue box appears.

3. Select if you want to **Open** the file in a suitable program, **Save** the file to your computer, or **Cancel** the export.

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