

System Navigation

This section describes keyboard notes, toolbar, login screen, field functionality, insert and delete record functionality, and operational notes that are helpful in navigating LPMS. The data shown in the pictures of this document are for format review purposes only.

Keyboard Notes

The following keyboard functions can be helpful while working in LPMS.

Tab	Moves the cursor to the beginning of the next field.
Shift + Tab	Moves the cursor to the beginning of the previous field.
Ctrl + Tab	Moves the cursor to the beginning of the next field outside of the subform.
Alt + Arrow Down	Show the contents of a dropdown box without using the mouse.
Arrow Right/Left	Allows the user to select option buttons without using the mouse.
Space Bar	Allows the user to check and uncheck checkboxes without using the mouse.
ESC	Allows the user to stop the update of a record or to break out of a function.

Custom Toolbar



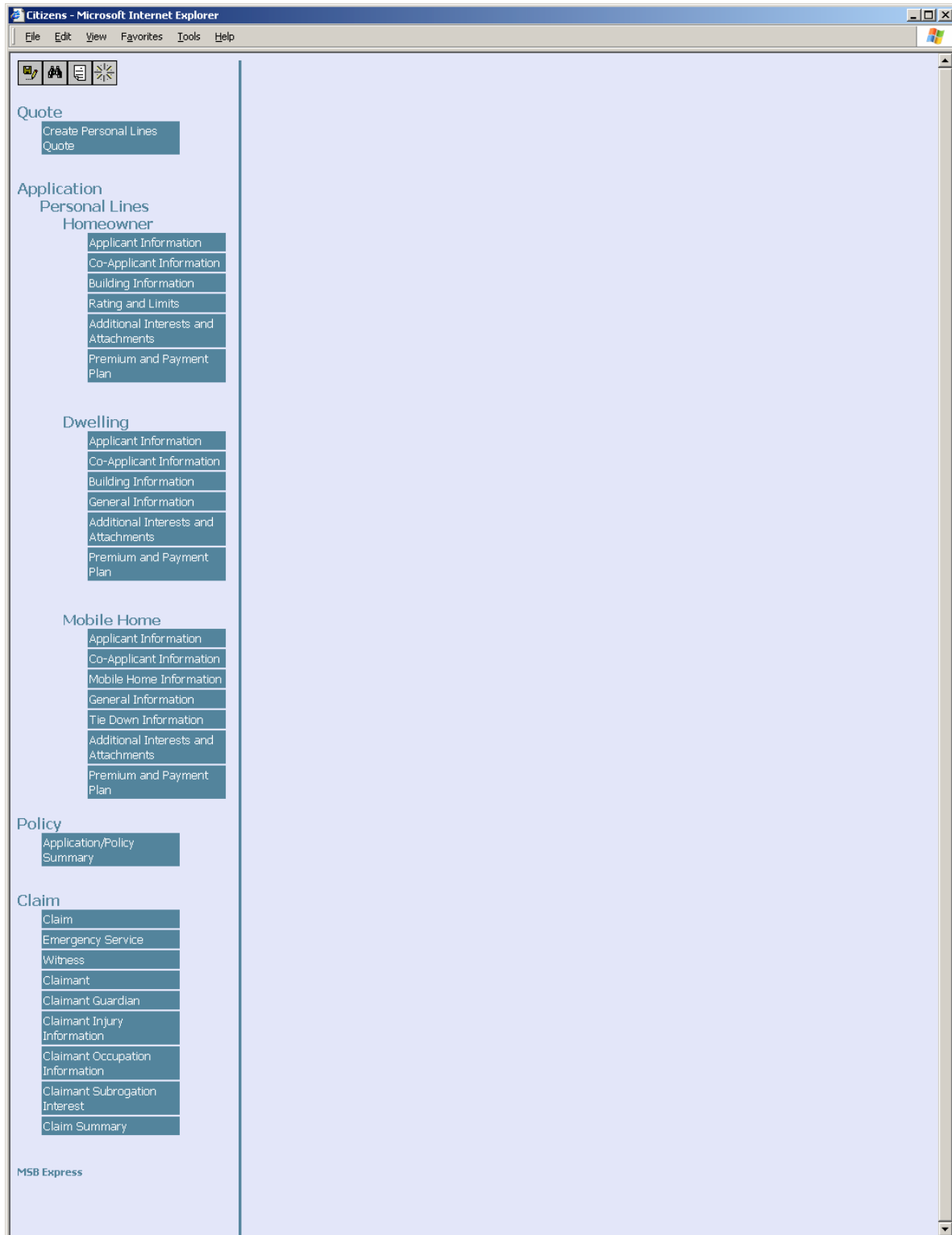
1 2 3 4

To assist the user, a custom toolbar is available from applicable screens and allows the user to navigate to LPMS screens. When the user puts their cursor over a toolbar button, the purpose of the button will be displayed. The buttons on the toolbar, listed from left to right, perform the following functions:

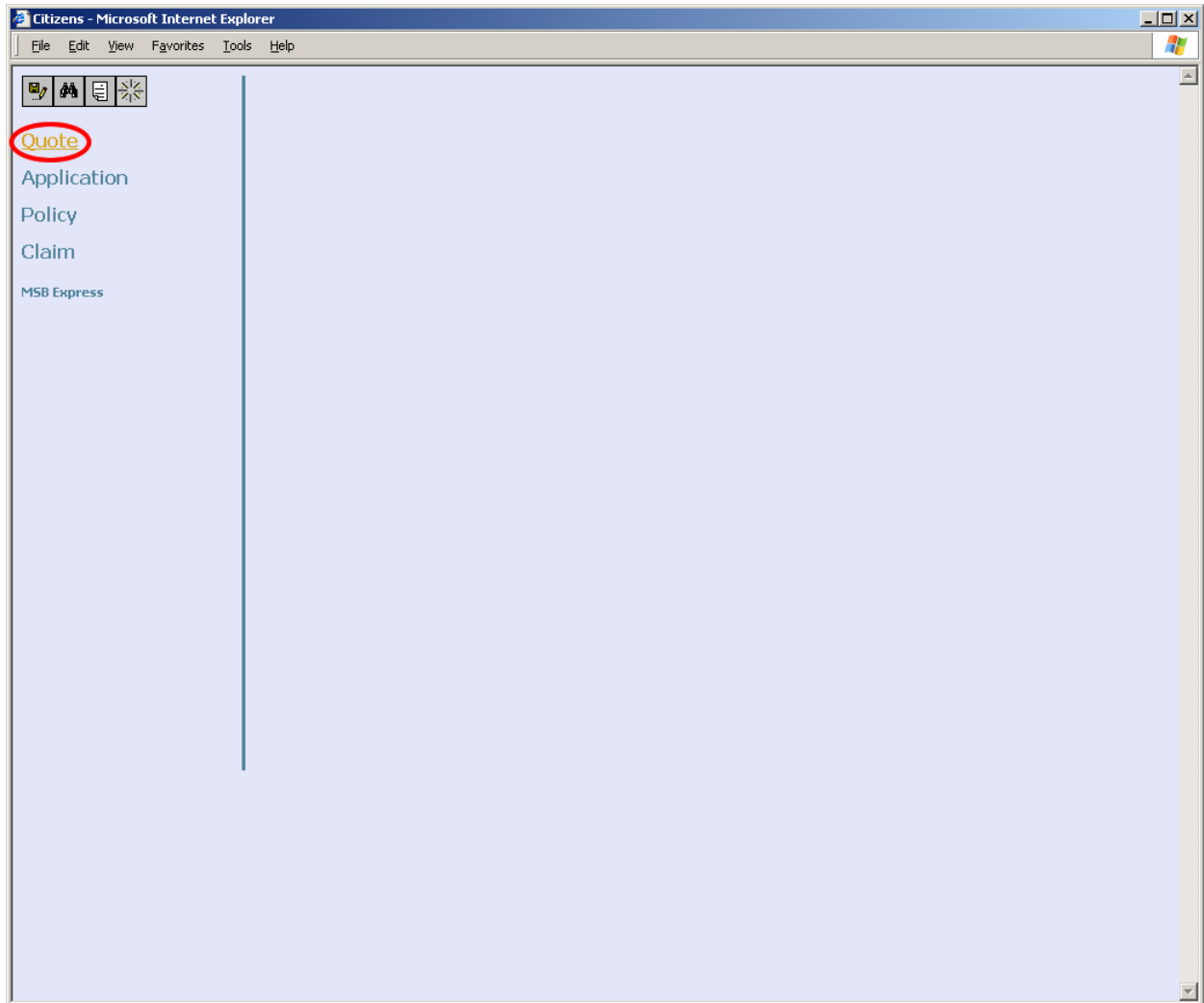
1. Save the current record
2. Open the *Policy Search* screen
3. Open the *Reports Menu* screen
4. Clear the current record

Treeview

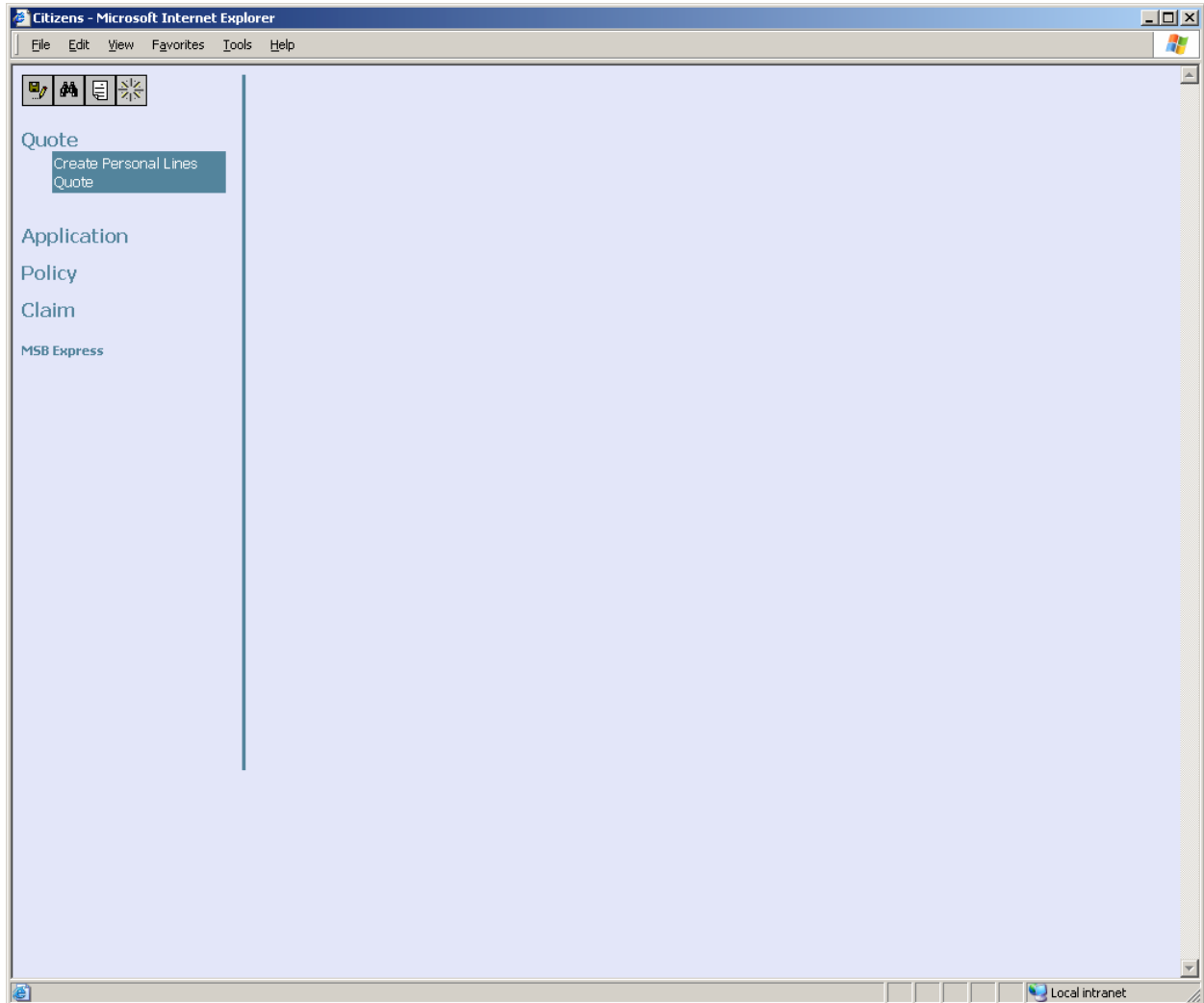
The security-authorized user will be allowed to access system tools option screens from the treeview. The following is an example of the available screens under the treeview:



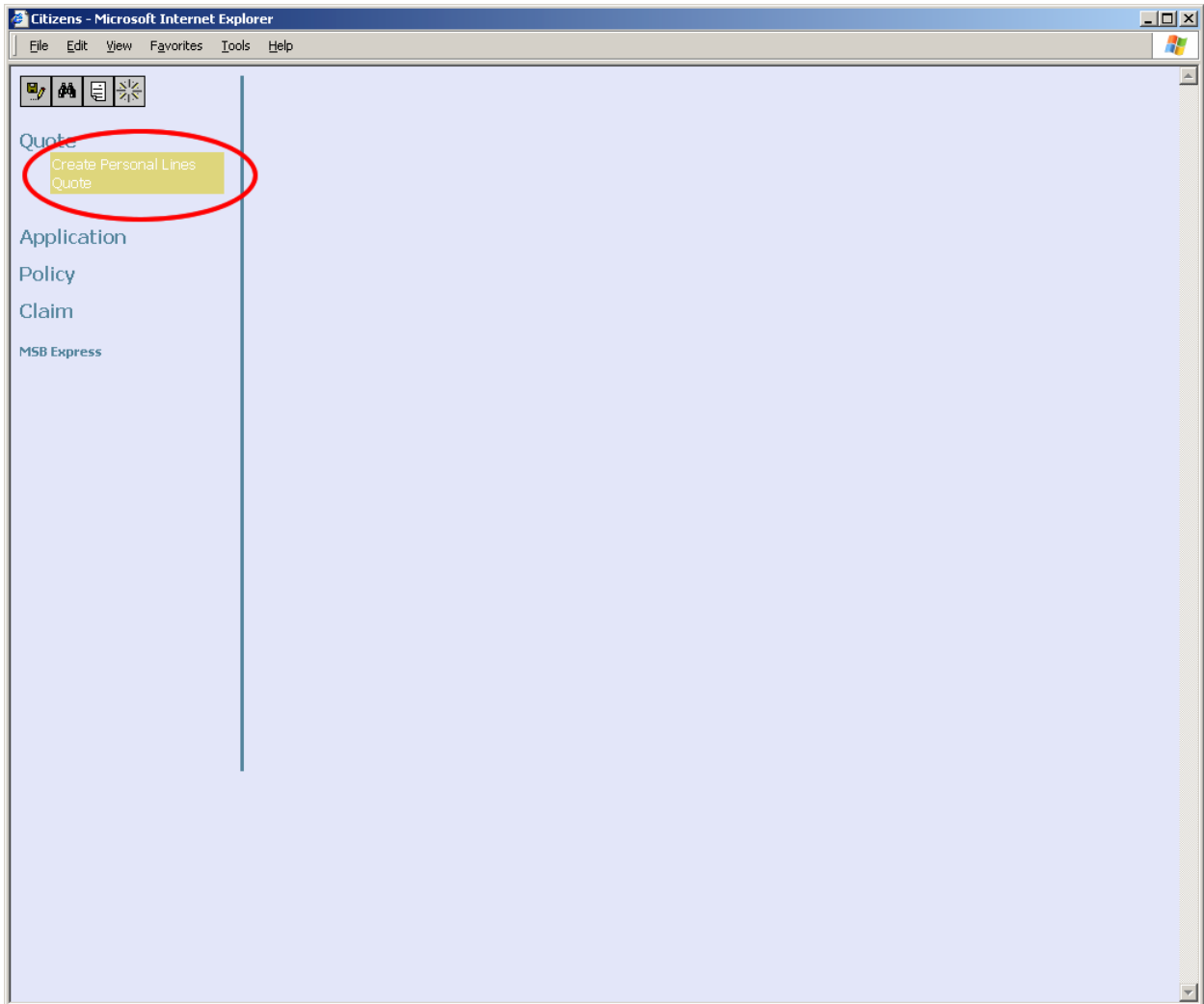
1. When the cursor is positioned over a module of LPMS, the module link becomes visible.



2. Click the link to expand the module and show its available screens. (Clicking the link again will collapse the module.)



3. Click the screen link within the module to go to the screen.



Field Functionality

The following table explains the functionality of fields in LPMS.

Field Color	Field Functionality	Definition
White	Optional field	Field can be filled out or left blank
Yellow	Required field	Information must be entered for field
Gray	Disabled field	Information cannot be input into field
Red Exclamation Point	Invalid data field, incomplete required field	Data entered is invalid in field; field is required and must be completed

The following screenshot gives examples of the field functionalities:

The screenshot shows the 'Applicant Information' form in a Microsoft Internet Explorer browser window. The form is divided into several sections, each with a title bar. Red annotations highlight specific field functionalities:

- Disabled Field:** The 'E-mail' field is highlighted with a red box and labeled 'Disabled Field'.
- Required Field:** The 'Title / first name' dropdown menu is highlighted with a red box and labeled 'Required Field'.
- Invalid Data:** The 'Date of birth' field contains an invalid date and is highlighted with a red box and a red exclamation point icon, labeled 'Invalid Data'.
- Optional Field:** The 'Home e-mail address' field is highlighted with a red box and labeled 'Optional Field'.

The form sections include:

- Applicant Information:** Fields for Title / first name, Middle name, Last name / suffix, SSN, Date of birth, Marital status, Mailing address 1, Mailing address 2, City / St / Zip, Home phone, Cell phone, Home e-mail address, Work e-mail address, and Years at this residence.
- Spouse's Contact Information:** Fields for Is spouse a co-applicant?, First/Middle/Last name/Suffix, SSN, Date of birth, Address 1, Address 2, City / St / Zip, and Reason spouse is not co-applicant.
- Applicant Previous Address (If less than 5 years at current address):** Fields for Address 1, Address 2, City / St / Zip, and Years at previous address.
- Applicant Occupation Information:** Fields for Occupation status, Occupation, Employer name, Years in current occupation, Years with current employer, Years with prior employer, and Prior employer name.

Record Functionality

The following steps describe how to insert, edit, and delete records in a list.

1. Click the *Add* link to clear all fields and allow entry of a new record.

The screenshot shows a web browser window titled "Additional Interest - Microsoft Internet Explorer". The page layout includes a left-hand navigation menu with sections for "Quote", "Application", "Personal Lines", "Homeowner", "Dwelling", and "Claim". Under "Dwelling", there are several menu items: "Applicant Information", "Co-Applicant Information", "Dwelling Information", "General Information", "Additional Interests and Attachments" (highlighted in yellow), "Premium and Payment Plan", and "Mobile Home".

The main content area is titled "Current Additional Interest" and contains a table with one row. The "Add" link in the first column of this table is circled in red. To the right of the table is a form for "Additional Interest" with the following fields:

- Add Interest? (radio buttons for Yes and No)
- Insurable interest: (dropdown menu)
- If 'Other', describe: (text input)
- All locations? (radio buttons for Yes and No)
- Bldg # and Loc #: (Building: 1, Location: 1)
- Name: (text input)
- Address 1: (text input)
- Address 2: (text input)
- City / St / Zip: (text input)
- Phone: (text input)
- E-mail: (text input)
- Reference number: (text input)

Below the "Additional Interest" form are two sections:

- Forms and Endorsements:** A list of documents including DWG-2 (01/93) Dwelling Property Broad Form DWG-2, CTZ-U-0174 (01/05) Privacy Policy, DWG-E100 (07/04) Louisiana Amendatory Endorsement, DWG-E290 07 04 Limited Fungi, Wet or Dry Rot or Bacteria Coverage, and DWG-E59 (01/93) \$500 Special Loss Deductible Clause.
- Attachments:** A list of documents including Loss Supplement, Photographs, and Replacement Cost Estimate.

At the bottom of the form is an "Additional Remarks" section with a large text area and a "Continue" button.

2. Fill out the applicable information and click the *Save* icon to submit the new record.

3. Click the *View* link to edit fields for the current record.

The screenshot shows a web browser window titled "Additional Interest - Microsoft Internet Explorer". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help".

On the left side, there is a vertical navigation menu with the following sections and links:

- Quote
- Application
- Personal Lines
- Homeowner
- Dwelling
 - Applicant Information
 - Co-Applicant Information
 - Dwelling Information
 - General Information
 - Additional Interests and Attachments (highlighted)
 - Premium and Payment Plan
- Mobile Home
- Claim

The main content area is divided into several sections:

- Current Additional Interest:** A table with one row containing the name "AMERICAS SERVICING CO". The "View" link in the first column of this row is circled in red. Other links in the row include "Add", "Cancel", and "Delete".
- Additional Interest:** A form with the following fields:
 - Add Interest?: Yes No
 - Insurable interest: First Mortgagee
 - IF 'Other', describe: [text input]
 - All locations?: Yes No
 - Bldg # and Loc #: Building: 1, Location: 1
 - Name: AMERICAS SERVICING CO
 - Address 1: ISAOA ATIMA
 - Address 2: P O BOX 5106
 - City / St / Zip: SPRINGFIELD OH 45501 - 5106
 - Phone: (000) 000-0000
 - E-mail: [text input]
 - Reference number: 1247012407
- Forms and Endorsements:** A list of documents:
 - DWG-2 (01/93) Dwelling Property Broad Form DWG-2
 - CTZ-U-0174 (01/05) Privacy Policy
 - DWG-E100 (07/04) Louisiana Amendatory Endorsement
 - DWG-E290 07 04 Limited Fungi, Wet or Dry Rot or Bacteria Coverage
 - DWG-E59 (01/93) \$500 Special Loss Deductible Clause
- Attachments:** A list of files:
 - Loss Supplement
 - Photographs
 - Replacement Cost Estimate
- Additional Remarks:** A large empty text area for notes.

A "Continue" button is located at the bottom right of the page.

4. Click the *Cancel* link to terminate the addition of a new record and return to the current record.

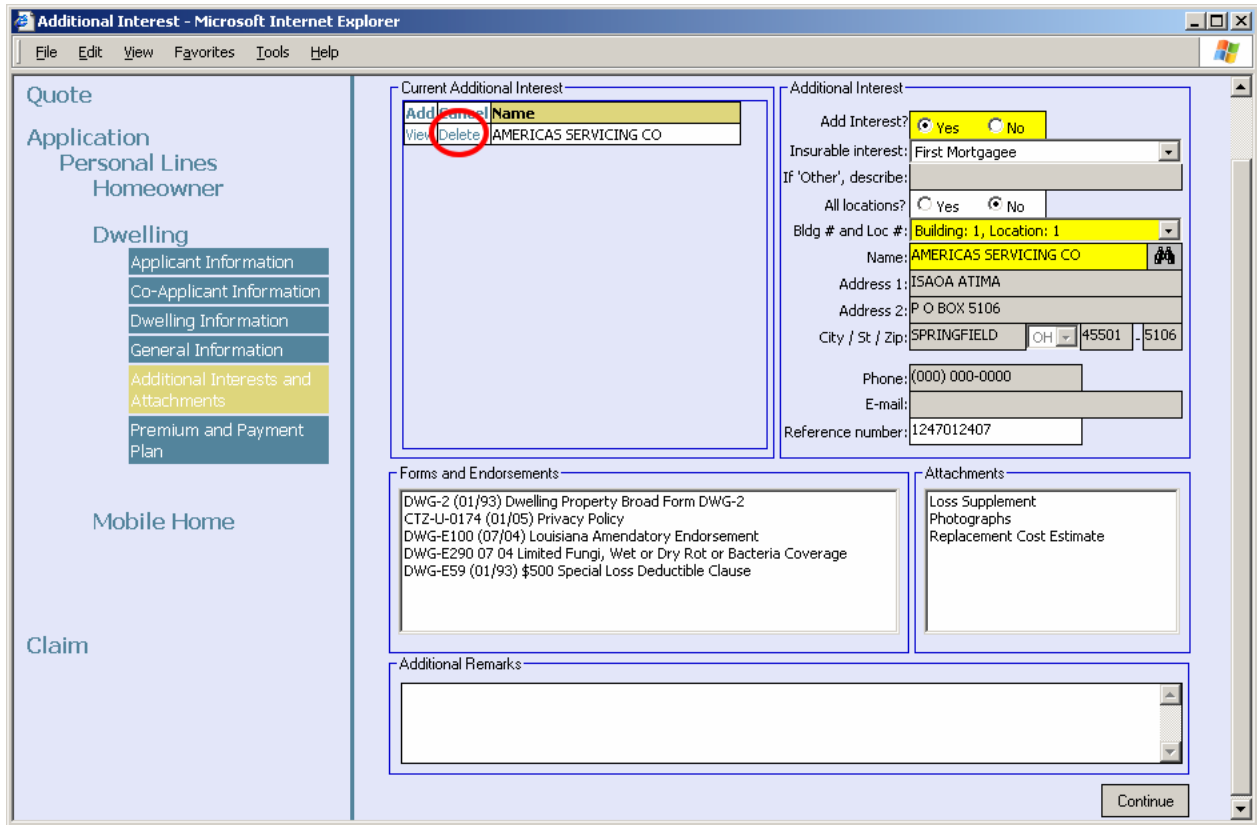
The screenshot shows a web browser window titled "Additional Interest - Microsoft Internet Explorer". The page layout includes a left-hand navigation menu with sections for "Quote", "Application", "Personal Lines", "Homeowner", "Dwelling", "Mobile Home", "Policy", "Claim", and "MSB Express". The "Dwelling" section is expanded, showing a list of menu items: "Applicant Information", "Co-Applicant Information", "Building Information", "General Information", "Additional Interests and Attachments" (highlighted in yellow), "Premium and Payment Plan", and "Plan".

The main content area is titled "Additional Interest" and contains several sections:

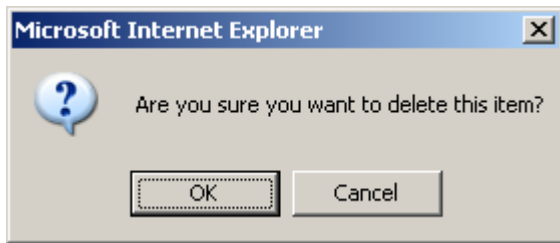
- Current Additional Interest:** A table with one row containing the text "Add [Cancel](#) Name". The "Cancel" link is circled in red.
- Additional Interest:** A form with the following fields:
 - "Add Interest?" with radio buttons for "Yes" (selected) and "No".
 - "Insurable interest:" with a dropdown menu showing "First Mortgagee".
 - "If 'Other', describe:" with a text input field.
 - "All locations?" with radio buttons for "Yes" and "No" (selected).
 - "Bldg # and Loc #:" with a dropdown menu showing "Building: 1, Location: 1".
 - "Name:" with a text input field and a small icon.
 - "Address 1:" with a text input field.
 - "Address 2:" with a text input field.
 - "City / St / Zip:" with a dropdown menu for city, a text input for state, and a dropdown for zip.
 - "Phone:" with a text input field.
 - "E-mail:" with a text input field.
 - "Reference number:" with a text input field.
- Forms and Endorsements:** A list of items including "CTZ-U-0187 (01/05) Dwelling Policy Jacket", "DWG-2 (01/93) Dwelling Property Broad Form DWG-2", "CTZ-U-0174 (01/05) Privacy Policy", "DWG-E100 (07/04) Louisiana Amendatory Endorsement", "DWG-E290 07 04 Limited Fungi, Wet or Dry Rot or Bacteria Coverage", "DWG-E59 (01/93) \$500 Special Loss Deductible Clause", and "DWG-E60 (04/01) Special Hurricane Deductible".
- Attachments:** A list of items including "Loss Supplement", "Photographs", "Replacement Cost Estimate", and "Special Hurricane Deductible".
- Additional Remarks:** A large text area for entering remarks.

A "Continue" button is located at the bottom right of the form area.

5. Click the *Delete* link to delete the current record.



6. The following screen will confirm deletion. Click the *OK* button.



Operational Notes

The following notes provide additional information about how to operate LPMS.

1. When inputting text, users must enter the appropriate spacing and characters for the following field types. The exact formats shown below must be followed in order for LPMS to accept the data.
 - a. Phone numbers: (000) 000-0000
 - b. Social Security Numbers: 000-00-0000
 - c. FEIN: 00-0000000
 - d. Dates: 00/00/0000

2. When closing an LPMS web browser screen, there is no prompt to save. If a screen is closed without clicking the *Save* button, data will not be retained. To avoid losing data, click the *Save* icon or the *Continue* button to move from screen to screen.