

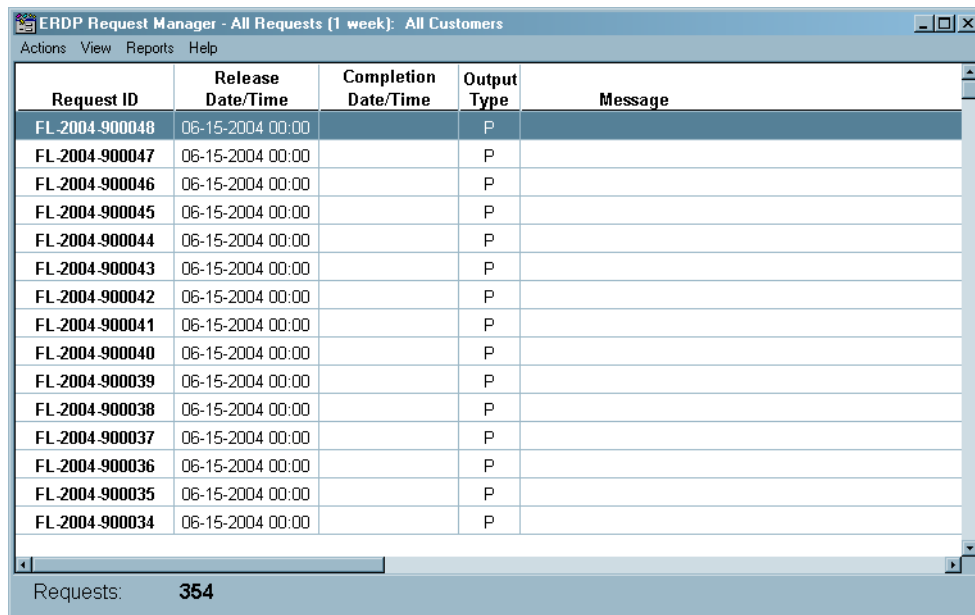
ERDP Request Manager User Guide

ERDP Request Manager provides several functions that are useful for the management of policy orders.

Layout for all requests, all customers

Double-click the ERDP Request Manager icon on the Windows desktop to start the program. The ERDP window is displayed with the following information:

- Policy display settings are in the title bar. The default setting is All Requests (3 days): All Customers.
- Request ID assigned by ATIDS.
- Release Date/Time. Orders are displayed in ascending order, beginning with the newest order. The date/time remains the same for an order, even if the order is resubmitted.
- Completion Date/Time. If an order is resubmitted, the completion date/time will change.
- Output Type is one of the following: D for ProPel, P for Print, or F for Fax.
- Message. If there is a problem with the order, it is explained in the Message column.
- The total number of orders in the queue is displayed at the bottom of the window.



The screenshot shows the ERDP Request Manager window titled "ERDP Request Manager - All Requests (1 week): All Customers". The window has a menu bar with "Actions", "View", "Reports", and "Help". Below the menu bar is a table with the following columns: "Request ID", "Release Date/Time", "Completion Date/Time", "Output Type", and "Message". The table contains 15 rows of data, all with a release date/time of "06-15-2004 00:00" and an output type of "P". The "Message" column is empty for all rows. At the bottom of the window, there is a status bar that says "Requests: 354".

Request ID	Release Date/Time	Completion Date/Time	Output Type	Message
FL-2004-900048	06-15-2004 00:00		P	
FL-2004-900047	06-15-2004 00:00		P	
FL-2004-900046	06-15-2004 00:00		P	
FL-2004-900045	06-15-2004 00:00		P	
FL-2004-900044	06-15-2004 00:00		P	
FL-2004-900043	06-15-2004 00:00		P	
FL-2004-900042	06-15-2004 00:00		P	
FL-2004-900041	06-15-2004 00:00		P	
FL-2004-900040	06-15-2004 00:00		P	
FL-2004-900039	06-15-2004 00:00		P	
FL-2004-900038	06-15-2004 00:00		P	
FL-2004-900037	06-15-2004 00:00		P	
FL-2004-900036	06-15-2004 00:00		P	
FL-2004-900035	06-15-2004 00:00		P	
FL-2004-900034	06-15-2004 00:00		P	

Requests: 354

How to change the display of orders

There are two ways to change how orders are displayed:

- Change the customer type.
- Change the request history time period.

Changing the customers display

1. Select **View** from the menu bar.
 2. Select **Customers** from the View menu.
 3. Select one of the following:
 - **Internals**
 - **Externals**
 - **All**
-

Changing the request history display

1. Select **View** from the menu bar.
 2. Select **Request History** from the View menu.
 3. Select one of the following:
 - **Today**
 - **3 Days**
 - **1 Week**
-

Refreshing the display

Press F5 at any time to refresh the display.

Split orders

Types of split orders

There are two types of split orders:

- Imaged and film policies in one order. The imaged policies will be sent with an annotation page stating that the non-imaged portion of the order will be sent under separate cover within 24 hours.
- Split policy in order. This is when an endorsement is imaged but Schedule A & B are on film. The imaged endorsement will be placed in the appropriate queue (print, fax, or Pro-Pel) behind the policy order confirmation sheet (TOC). When the film part of the order is scanned, the imaged endorsement will be delivered with the TOC and scanned images.

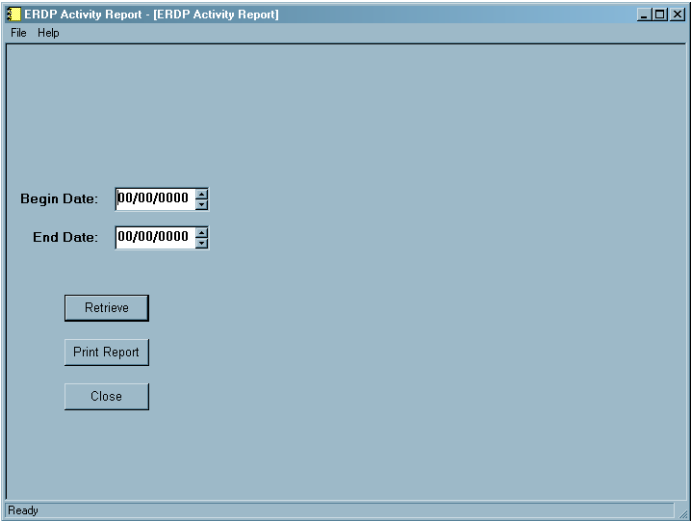
If there is an imaged policy and a split policy in an order, the imaged policy is sent out with an annotation page stating that the non-imaged portion of the order will be sent under separate cover within 24 hours.

Reports

You can generate an activity report that shows all the orders received between two dates.

Generating an activity report

1. Select **Reports** from the menu bar. The ERDP Activity Report window is displayed.



2. Type a beginning date and ending date. Use the format MMDDCCYY.
3. Click **Retrieve**. The ERDP Activity Report is displayed.
4. Optional. Click **Print Report** to print the report.
5. When you are done generating reports, click **Close**.

Troubleshooting

There are several procedures that can be used to fix problems with orders. All of these actions are performed with the All Requests queue displayed.

- Resubmitting an order is useful if there are numerous problems with the order. This is the same as re-entering the order in PPSO or ATID Option 9.
- Re-Outputting an order results in the order being refaxed, reprinted, or sent to ProPel again.
- Changing the output of an order lets you switch between print, fax, or ProPel. The output will not change on the TOC for the order.
- Completing an order is for orders that you know have been delivered, but are not marked as complete in ERDP.

Resubmitting an order

1. Click the order you want to resubmit.
 2. Select **Actions**, then **Resubmit**. The order is resubmitted.
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Re-Outputting an order

1. Click the order you want to re-output.
 2. Select **Actions**, then **Re-Output**. The order is refaxed, reprinted, or sent to ProPel again.
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Changing output for an order

1. Click the order you want to change.
 2. Select **Actions**.
 3. Select **Change Output**, then **Print**, **Fax**, or **ProPel**. The order output is changed.
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Completing an order

1. Click the order you want to mark as complete.
2. Select **Actions**, then **Complete**. The order is marked as complete.