<Software> 101
Abbreviated User Guide

<Software Logo>

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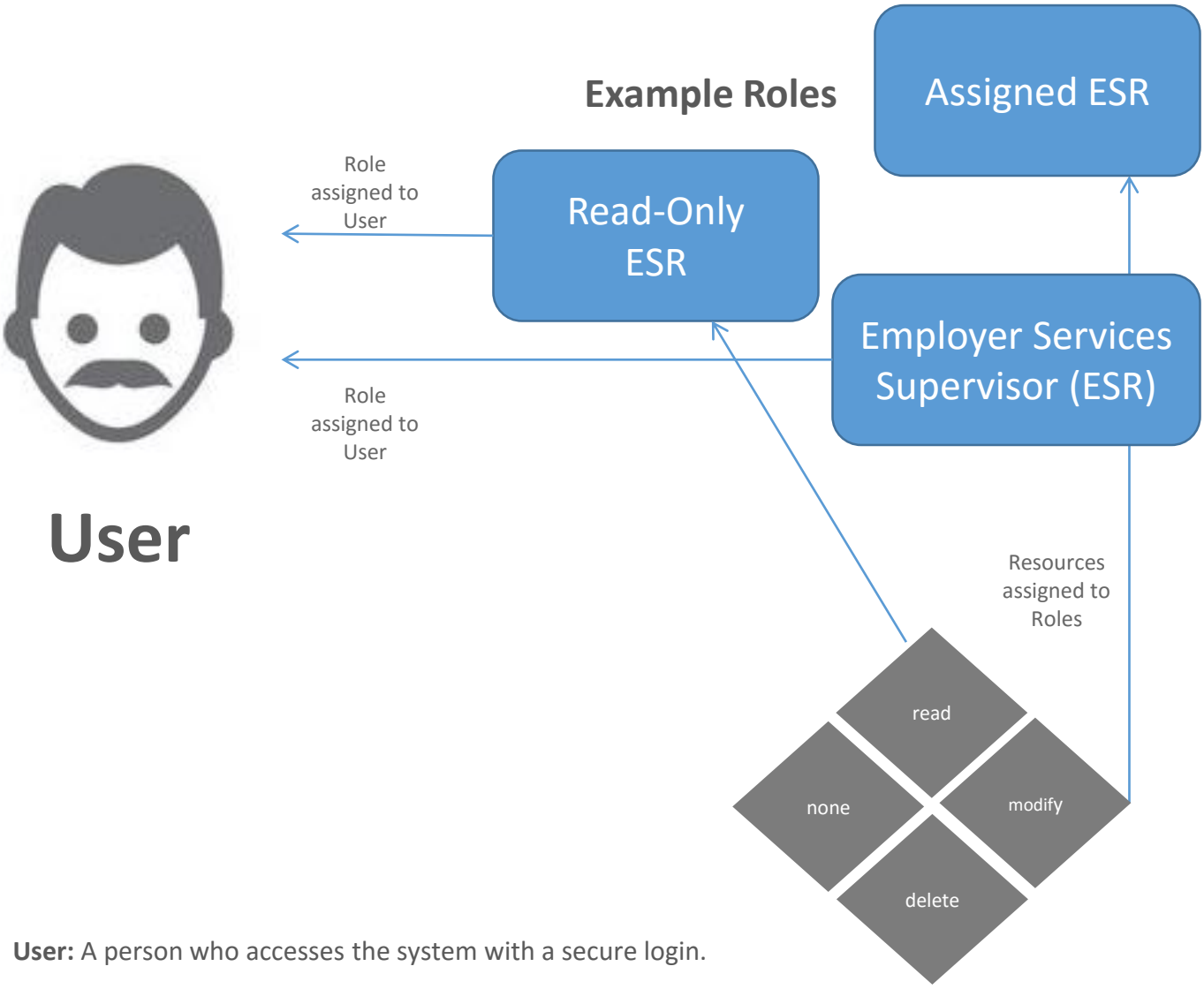
Security Concepts

<Software> is a role-based application. The roles assigned dictate the information you are able to view, modify, and save.

See the diagram below to better understand user roles.



User: A person who accesses the system with a secure login.

Role: A user can be assigned one-to-many roles within <Software>, and one role can be assigned to one-to-many users.

Global Features

Reference the image below to learn about global features and their purpose within <Software>!

Purpose: To provide easy dashboard, home menu, navigation, message, and secure logout functionality from any page in the <Software> system.

How to use:

- Click **Dashboard** to view a report of completed, pending, and outstanding work items.
- Click **Home** to access your home menu from anywhere in <Software>.
- Click **My Messages** to receive messages linked to your personal <Software> account.
- Click **Previous** to navigate back through <Software> windows.
- Click **Log Out** to securely end your <Software> session.

Menu Items

The menu items on your screen are determined by your roles.

For example, if you do not have the <Software> role that allows you to modify another employee's security roles, you will not see the Security screen.

Purpose: To break <Software> down into easily accessible categories.

How to use: Click any menu item to be taken to the Lookup screen associated with the menu topic.

Some menu items are broken down into submenus, which are used to divide subsystems into categories.

For example, try hovering your mouse over the **Member** menu to display the **Universal Lookup** and **Merge Member Request** submenus.

Lookup vs. Maintenance Screens

<Software> is broken down into Lookup and Maintenance screens.

Lookup screens are used to find and sort records while Maintenance screens are used to update records.

You may only make and save changes on a Maintenance screen.

Lookup Screens:

- ✓ Search for and open existing records
- ✓ Store search criteria
- ✓ Create a new record
- ✓ Export search results to MS Excel

<Software Image>

<Software Image>

Maintenance Screens:

- ✓ Modify and save data
- ✓ Move between records
- ✓ Refresh data
- ✓ Perform processing actions

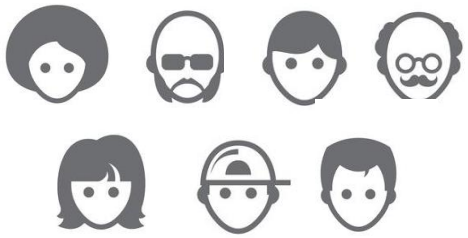
Person vs. Party

In <Legacy Software>, a “Party” is classified as any individual who has a relationship with <Client>. In <Software>, a “Person” is classified as a Member or a Payee record.

Please note that Unpaid Beneficiary, Lawyer, and Guardian records will no longer be considered a “Party” or “Person” as <Client> adopts new data: these entities and their information will live under the member record they are tethered to.

For example: In <Software>, a living member’s beneficiary information is stored under their associated Person record. Then, once that member passes away, their beneficiary information is used to create a Payee record.

<Software> Person:
Payees and Members



<Legacy Software> Party:
Unpaid Beneficiaries, Payees, Guardians, Members, Lawyers

Overview of Member Records

What kind of information lives within a Member record?

- Member Name
- Pension and Membership Numbers
- Date of Birth
- SSN
- Address
- Relationships to other members
- Alerts related to Member accounts
- Recent inquiries
- Beneficiary information
- Contact information
- Legal document information
- Comments left by <Client> employees
- Images and Documents
- Recent processes

<Software Image>