



# Resource Center Reference Guide

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## Introduction

The Agency Administrators Resource Center is a web application containing Information, Links and Tools designed to be utilized in conjunction with workday tasks here at Agency Administrators. The application consists of a header bar and several Pods with specific information and functionality. Click on the underlined links below for more detail:

- The Header Bar

- The Header Bar Consists of the Agency Admins Logo and a list of Agency links assigned to your Agency Administrator Team.

- The Pods

- User Information Pod

- The User Information Pod is a container consisting of information relevant to you and other user's in the office, including the following:
  - Availability
  - Team Name
  - Security Level
  - Contact Information
  - Producer Code Credentials

- Agency Administrators Pod

- The Agency Information Pod is a container consisting of information and functionality relevant to Agency Administrators, including the following:
  - Messaging
  - Events
  - News/Announcements
  - Contact Information
  - Office Closures
  - Business Hours
  - Resource Center Reference Guide

- Agency Information Pod

- The Agency Information Pod is a container consisting of information relevant to the selected Agency, including the following:
  - Agency Information Document
  - Mailing & Contact Info
  - License Number
  - Notes
  - Contacts & Information
  - Associated Carriers, their Producer Codes & Credentials
  - Office Closures
  - Business Hours

- Carrier Information Pod

- The Carrier Information Pod is a container consisting of information relevant to the selected Carrier, including the following:
  - Mailing & Contact Info
  - Notes
  - Contacts & Information
  - Business Hours

- AARC Documents Pod

- The AARC Documents Pod is a filter-able container consisting of PDF Document links divided into the following Sections:
  - Acord Forms
  - Billing
  - Quote Sheets
  - Supplemental Forms
  - Underwriting Guidelines
  - Miscellaneous

- AARC Links Pod

- The AARC Documents Pod is a filter-able container consisting of system links divided into the following Sections:
  - Phone
  - Email
  - Web
  - Property Cards

## The Header Bar

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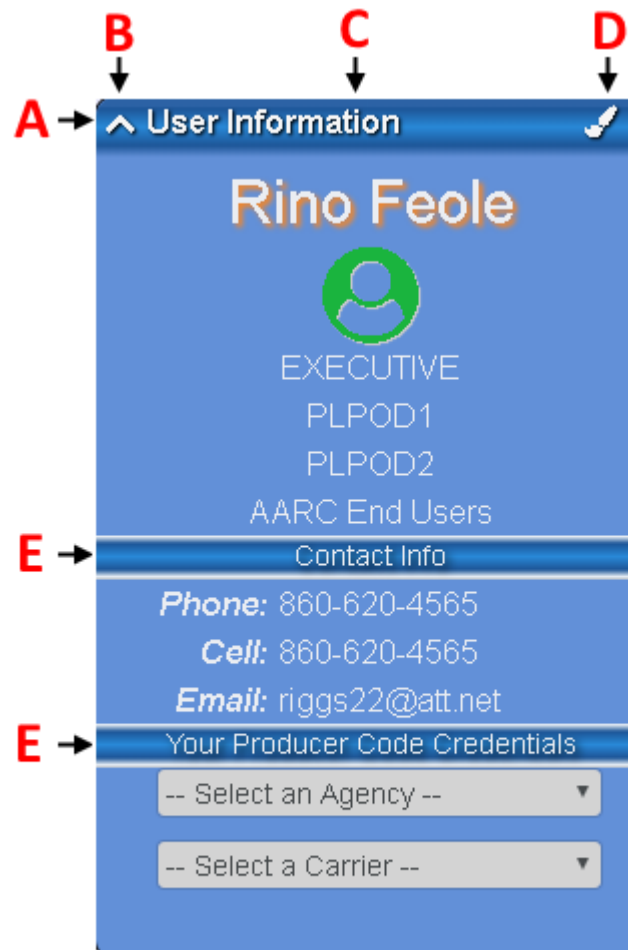


The header bar is a static toolbar that is permanently located at the top of the Resource Center. It consists of the Agency Administrators logo, links to Agencies and scroll buttons to traverse through the list of Agency Links.

- **A:** Agency Administrators logo.
- **B:** Hide/Show Pods.
- **C:** Scroll Agency Links to the left.
- **D:** Agency Links. A listing of all Agencies associated with you Agency Administrator's Team. Click on these links to load the Agency Pod with the selected Agency's information.
- **E:** Scroll Agency Links to the right.

## The Pods

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The Pods are a series of windows containing specific information and tools within the Resource Center. These Pods can be dragged, by the Pod Header Bar (A) or Pod Name (C) to any position on the screen, even off screen to the right, if you desire to get it out of sight. They can also be collapsed and expanded by clicking the Expand and Collapse Tool (B) on the left-hand side of the Pod Header Bar. The background colors of the Pods can be changed by using the Pod Color Tool (D) on the right-hand side of the Pod Header Bar. The Pods are broken into sections which can be Expanded and Collapsed by clicking on the Pod Section Header Bars (E). The width of these Pods can be narrowed and widened by placing the mouse on the left- or right-hand edge of the Pod body until the 'resize' cursor (↔) appears and then hold the mouse down and then narrow/widen the Pod's width to the desired dimension. The Pods location, color and width will be saved whenever a change to its appearance is made and will appear in the same location when you start the Resource Center.

- **A: Pod Header Bar**. The Pod Header Bar contains the Pod Title and tools to control the Pod's appearance. The Pod can be positioned anywhere on the screen by clicking and dragging the Pod by the Pod Header Bar (**A**) or Pod Name (**C**) to the desired location. Avoid trying to drag the Pod by the tools on the bar (**B & D**), as they will activate the tool and ignore the drag process.
- **B: Expand and Collapse Tool**. The Pod can be collapsed and expanded by clicking on this tool.
- **C: Pod Title**.
- **D: Pod Color Tool**. The background color of the Pod can be changed to whatever color you desire. Click on this tool and the following Color Picker appears:



Simply choose the primary color range from the full spectrum on the right, then click anywhere in the large box to select the exact color you prefer. Then click 'Choose' to apply the background color to the Pod.


- **E: Pod Section Headers**. The Pod Section Header is used to separate the Pods into logical sections. These sections can be collapsed or expanded, to preserve screen space, by clicking on the Pod Section Header Bars (**E**).

## The User Information Pod

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The screenshot shows a 'User Information' window with a blue header and a white body. The header contains the title 'User Information' and a small icon. The body is divided into several sections. The first section, labeled 'A', displays the user's name 'Rino Feole' in large blue text. Below the name is a green circular profile icon, labeled 'B'. Under the icon are the text labels 'PLPOD1' and 'PLPOD2', labeled 'C'. Below these is the text 'AARC Administrators'. The next section, labeled 'D', is titled 'Contact Info' and contains the following information: 'Phone: 860-620-4565', 'Cell: 860-620-4565', and 'Email: riggs22@att.net'. The final section, labeled 'E', is titled 'Producer Code Credentials' and contains two dropdown menus: 'Blough Insurance' and 'Allied/Nationwide'. Below the dropdowns are three fields: 'AN123P' (with a blue 'P' icon), 'UID: ANUID' (with a blue 'U' icon), and 'PWD: ANPWD' (with a blue 'P' icon). At the bottom of the window is a legend with four colored circles and their corresponding labels: a blue circle for 'Personal', a red circle for 'Comm.', a green circle for 'Both', and a yellow circle for 'Admin'.





**A** → Rino Feole

**B** → 

**C** → PLPOD1  
PLPOD2  
AARC Administrators

**D** → **Contact Info**  
*Phone:* 860-620-4565  
*Cell:* 860-620-4565  
*Email:* riggs22@att.net

**E** → **Producer Code Credentials**  
Blough Insurance  
Allied/Nationwide  
  AN123P  
 UID: ANUID  PWD: ANPWD

 - Personal  - Comm.  - Both  - Admin

The User Information Pod contains all information pertaining to you and other Resource Center Users. By default, the username of the person logged into Windows is the account that the application runs under. The Pod consists of the following segments:

- **A: User's Name.** The User's name is located at the top of the Pod. When the name is clicked, a list of Resource Center Users is presented. You can choose any of those users to view all their information listed below except for Producer Code Credentials. Only the logged in user's Producer Code credentials will be accessible.


- **B: Status Indicator**. The Status Indicator changes color based on the selected User's availability. It will be generally duplicated by the User's status in the Mitel Contact Client Center with the following statuses:

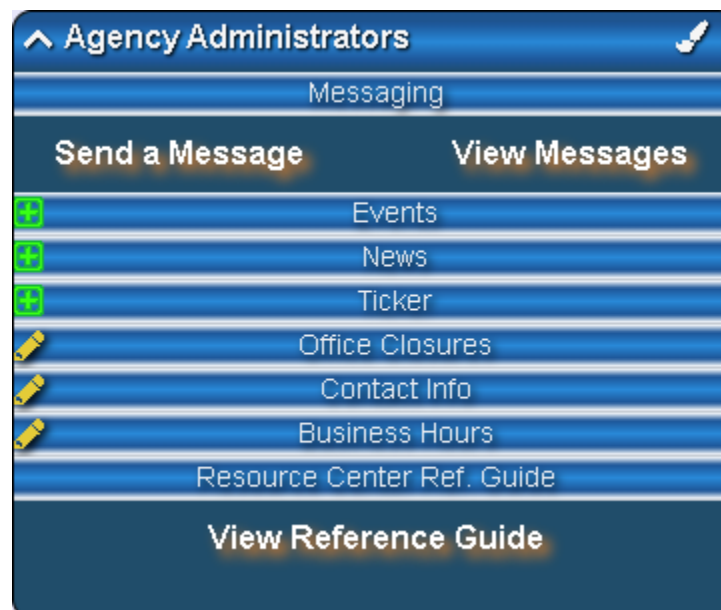


Available



Not Available

- **C: Teams & Security Level**. The listing of the User's Teams followed by their Security Level appear below the Status Indicator.
- **D: Contact Information Section**. This section displays the User's work phone number, cell phone number and E-mail address. The section can be collapsed by clicking on the Contact Information header bar.
- **E: Producer Code Credentials**. Only the logged-in User's Producer Credentials will appear here.
  - Choose the Agency and Carrier to display the associated Producer Code, User ID and Password.
  - Upon choosing the Agency and Carrier, their respective Pods will be populated by the chosen Agency and Carrier.
  - The Producer Code, Username & Password can be copied to the clipboard by clicking on the "Copy" icon next to each.  

  - The section can be collapsed by clicking on the Contact Information header bar.



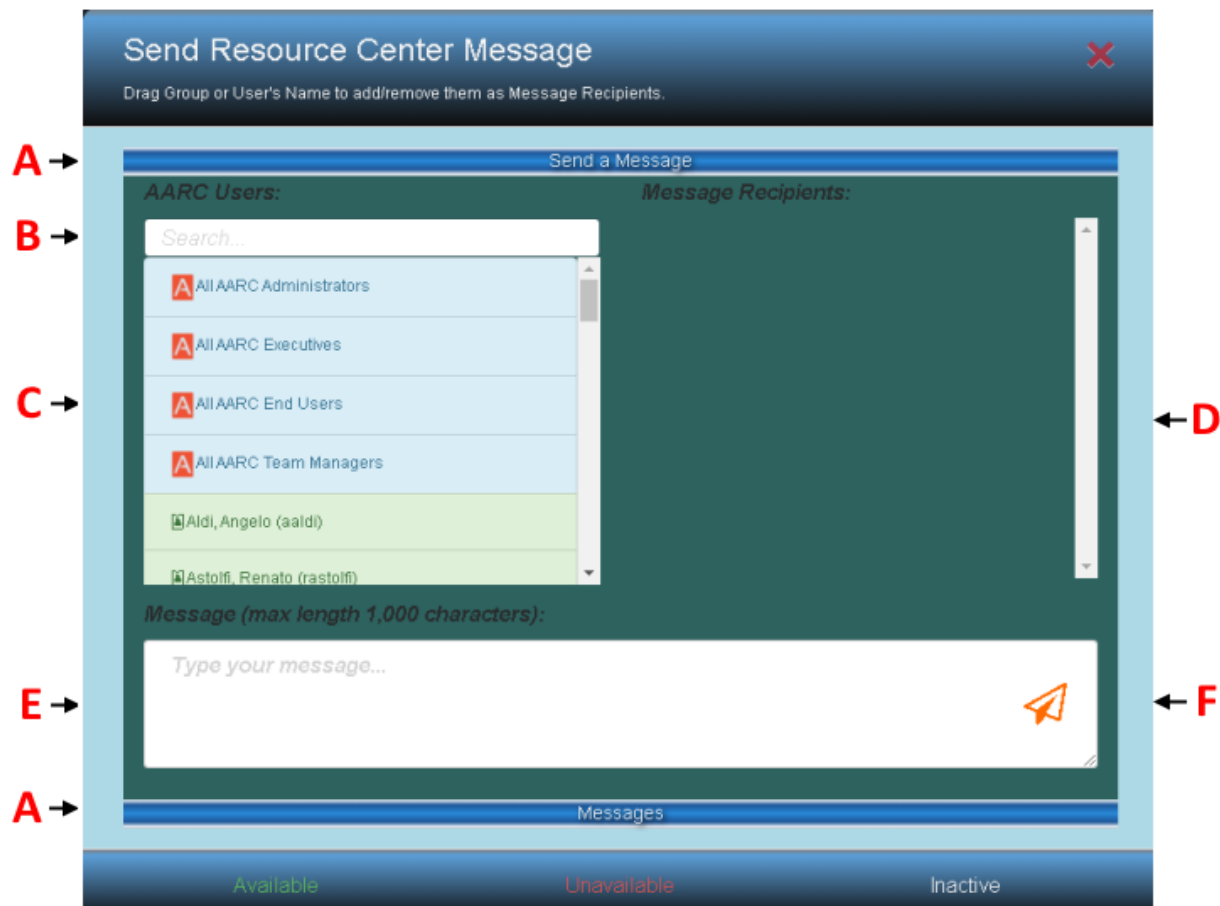
The Agency Administrators Pod contains information and functionality strictly related to Agency Administrators. The following is a listing of the sections and their purpose:

- Messaging. Here the user can choose to send, or view messages sent within the Resource Center application. The sending and the viewing of messages are contained within the same dialog window. Depending on which option you choose, the selected section is expanded, and the other section is collapsed. Their display can be toggled by clicking on either the section headers (A in image below).



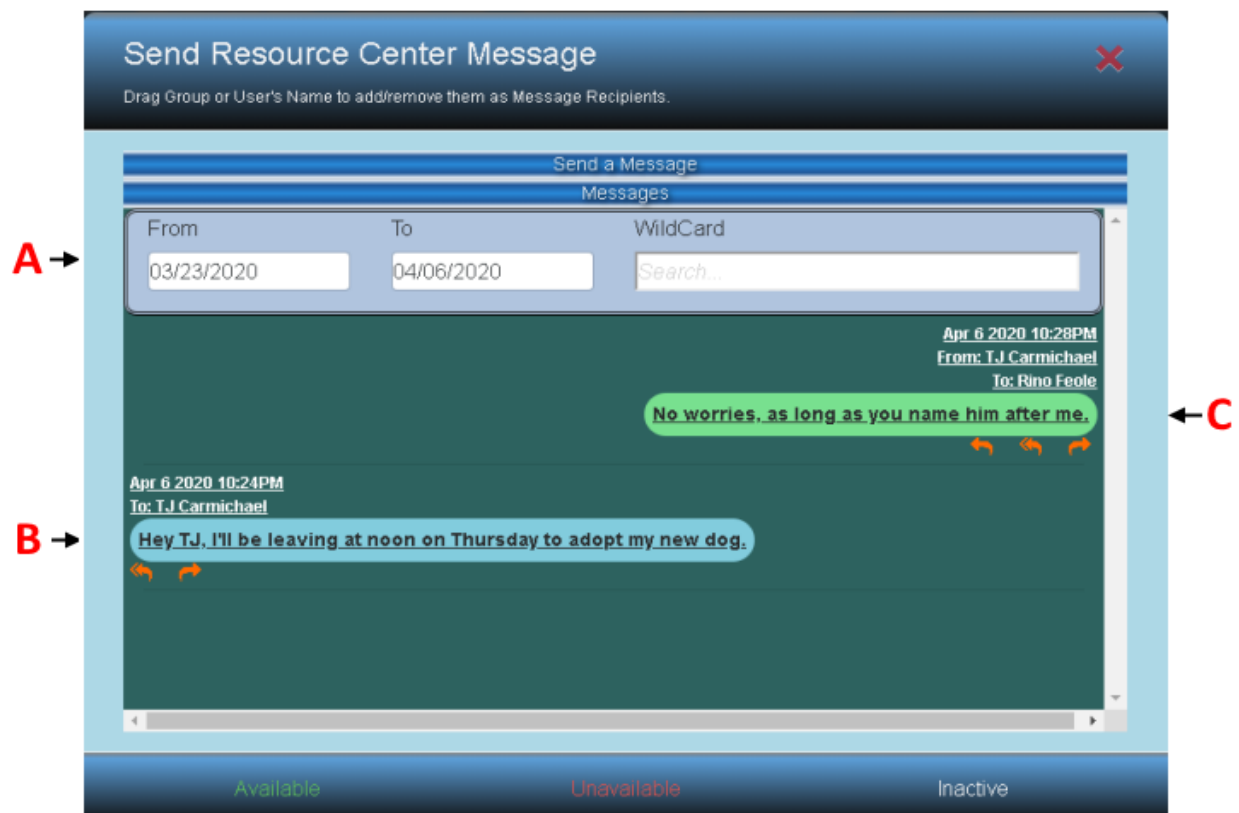
○ Send a Message.

- Choose your message recipients by dragging them from the list of Agency Administrator Resource Center (AARC) Users (**C**) on the left and dropping them to the list of Message Recipients (**D**) on the right. If you drag and drop any of the 'group' items (signified by **A**), the user's represented by that group will be added to the Message Recipient (**D**) list.
- Message Recipients can be removed, by dragging and dropping them back to the AARC Users (**C**) list on the left.
- The AARC Users (**C**) list can be filtered by typing any part of the User's name in the filter text box (**B**)
- Type your message, up to 1000 characters in length, in the text area (**E**). The character count and remaining characters indicator, above the text area, will update as you type your message.
- When the message is ready to be sent, click the paper airplane icon (**F**), to send the message.

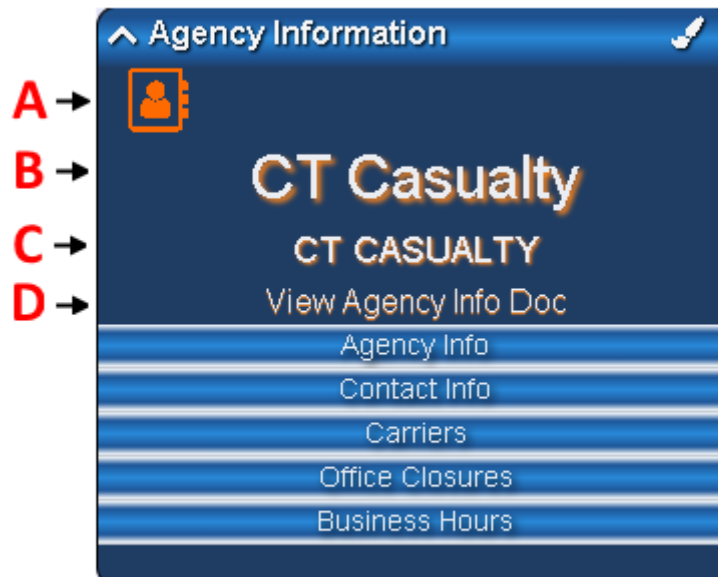


- View Messages.

- By default, the last two weeks messages are displayed. All your messages are saved and can be retrieved by altering the messages filter (A). The filter consists of a date range the message was sent/received and a wildcard filter, which will filter on the sender, all recipients and the message body.
- All your sent messages will appear on the left side of the messages window, in blue bubble. It will list:
  - The time message was sent
  - All recipients
  - The message
  - Icons to Reply to All (↩) and Forward (➡).
- All your received messages will appear on the right side of the messages window, in green bubble. It will list:
  - The time message was received
  - The Sender
  - All recipients
  - The message
  - Icons to Reply (↩), Reply to All (↩) and Forward (➡).



- Office Events. Agency Administrators' office events will appear here,
- News: Agency Administrators' news or announcements will appear here.
- Office Closures: Agency Administrators' office closures will appear here. With the date and reason listed in chronological order.
- Contact Info: Agency Administrators' contact info will appear here including:
  - Business Address
  - Phone Number
  - Email Addresses
  - Website
- Business Hours: Agency Administrators standard hours of operation.
- Resource Center Reference Guide: A link to this document.



The Agency Information Pod contains information and functionality related to the selected Agency. Agencies can be selected from various locations in the Resource Center:

- Clicking the Agency Catalog icon (A)
- Clicking the Agency Name (B)
- Clicking on an Agency Name in the Header Bar
- Choose the Agency in the Producer Code Credentials section of the User Information Pod.

Along with the Agency Catalog icon (A) and Agency Name (B), the Pod header contains the Agency ID (C) and a link to the Agency Information PDF (D). The following is a listing of the Pod sections and their purpose:

- Agency Info. Here the user can find information about the selected Agency regarding;
  - Mailing Address
  - Business Address
  - Phone Number
  - Texting Information
  - Fax Number
  - Website
  - License Number
  - Notes

- Contact Info: A listing of any Agency Contacts including:
  - Name
  - Phone Number
  - Email Address
- Carriers: Any associated Carriers, listed alphabetically with their associated Producer Codes & Credentials.
- Office Closures: Agency's office closures will appear here. With the date and reason listed in chronological order.
- Business Hours: Agency's standard hours of operation.



The Carrier Information Pod contains information and functionality related to the selected Carrier. Carriers can be selected from various locations in the Resource Center:

- Clicking the Carrier Catalog icon (A)
- Clicking the Carrier Name (B)
- Choose the Carrier in the Producer Code Credentials section of the User Information Pod.

The following is a listing of the Pod sections and their purpose:

- Carrier Info. Here the user can find information about the selected Carrier regarding;
  - Mailing Address
  - Business Address
  - Speed Dial Extension
  - Phone Number
  - Fax Number
  - Website
  - License Number
  - Notes
- Contact Info: A listing of any Agency Contacts including:
  - Name
  - Phone Number
- Email Address



The AARC Documents Pod is a library of links to PDF documents in the Resource Center: The list of documents can be filtered by typing any part of the document's name in the filter text box.

The PDF Document links divided into the following Sections:

- Acord Forms
- Billing
- Quote Sheets
- Supplemental Forms
- Underwriting Guidelines
- Miscellaneous





The AARC Links Pod is a library of links to various resources in the Resource Center: The list of links can be filtered by typing any part of the link's text in the filter text box. The links are divided by Type Sections. A link can be added to any of the Type Sections by clicking the green plus (+), on the left side of the Type Section Headers. Links are divided into the following Sections:

- Phone. Clicking on the link will automatically dial the number when clicked.
- Email. Will automatically generate an email to the link's target, using Outlook.
- Web. Will open a tab in your default browser to the link's website.
- Property Cards. Will open a tab in your default browser to the link's Property Card website