



CoreLogic®



# RCT Express<sup>®</sup>

## Administrator Training Manual

Version 4.3

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# Contents

<b>Introduction</b>	<b>1</b>
System Requirements .....	1
<b>Tools</b>	<b>2</b>
<b>Administration</b>	<b>3</b>
Manage Agencies .....	3
Manage Users.....	4
<b>Broadcast Message</b>	<b>7</b>
<b>Change My Information</b>	<b>8</b>
<b>Configuration Settings</b>	<b>9</b>
Additional Fields Settings .....	9
Contents Valuation Settings .....	10
Hail Insight™ Settings .....	17
InterChange Settings .....	25
Password Settings.....	26
Property Imagery Settings.....	29
Roof Age Settings .....	30
Technical Support Settings.....	30
<b>Manage Additional Fields</b>	<b>33</b>
<b>Manage Business Partners</b>	<b>38</b>
<b>Manage Underwriting Questions</b>	<b>40</b>
<b>Reassign Valuations</b>	<b>42</b>

# Introduction

RCT (Residential Component Technology) Express is a web-based, hosted system used to calculate a property's reconstruction cost based upon the risk-specific features of the individual property. Depending on system licenses, RCT may also provide address-specific information regarding the property including square footage, year-built, number of stories, roof age, geospatial hazard information, building permit data, and the ability to estimate the value of the property's contents.

RCT helps calculate the industry's most reliable replacement values for any style of home by utilizing risk-specific reconstruction costs and using interior and exterior home characteristics. It now, however, has a host of new capabilities that streamlines and further automates the management and execution of an insurance to value workflow. These capabilities include a new, user-friendly single-screen interface with integrated decisioning, seamless valuation of any home in a carrier's portfolio, pre-fill and easy-to-use search and data entry features.

This manual covers the tasks associated with all the administration tools within RCT Express. These tools are used to configure and define certain features and functions of the program. Use the options on the Tools page to perform the various administrative tasks.

## System Requirements

RCT system requirements:

- Browsers supported
  - Internet Explorer 9, 11 and Edge (Windows) Compatibility mode should not be enabled
  - Chrome Current version (Windows)
  - Firefox Current version (Windows)
  - Safari Current version (Windows)
- Browsers must have JavaScript turned on.
- Browsers must have cookie support turned on.

Note: When using IE do not use Compatibility View. If you need to use Compatibility View for other websites, edit your settings in IE under Tools>Compatibility View Settings

- Browsers need to support the PDF viewer within the browser in order to view generated reports.
- Minimum screen resolution: 1024 x 768

We realize that you may be using various operating systems and internet browsers within your organization. Some of these Internet browsers not listed above may work. However, any browser not listed above has not been fully tested by CoreLogic.

# Tools

To access the Tools menu click on **Tools** in the upper right of the Dashboard. The menu below displays all of the options that may be available to you in your role as Administrator for RCT.

Note: The options available on the Tools menu are based on the options your company uses and what your user role allows you to access. The topics covered in this section are all the options that may be available.



**Tools Menu**

# Administration

Use the **Tools > Administration** settings to manage users and manage agencies.

## Manage Agencies

Use **Tools > Administration > Manage Agencies** to find existing agencies, create new agencies, and edit or delete existing agencies.

Not all user roles are associated with agencies. In a typical RCT Express configuration only the Agency Manager and Agent user role are associated with agencies. Administrator and Underwriter user roles are not associated with agencies. RCT will only allow you to associate a user with an agency if the user role requires the association.

### To find an existing agency:

- In the **Find Agency** field enter the agency name, address, or ZIP code and click **Search**. You can enter just a few characters instead of a complete name.
- You can filter or sort the results that are displayed to make it easier to find the specific result you are looking for. The filter and sort features work the same as they do in the valuation dashboard.



The screenshot shows the 'Manage Agencies' interface. At the top, there is a search bar containing the text 'abcd' and a 'Search' button. Below the search bar is a 'Create Agency' section with a 'Clear Filtering' button. The main area displays a table with the following data:

Agency Name	Address	City	State/Province	Zip/Postal Code	Phone
ABCD Agency	100 Main Street	Milwaukee	WI	53210	414-555-1515

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and 'Displaying items 1 - 1 of 1'. A 'Close' button is located at the bottom right of the interface.


## Manage Agencies

**To create a new agency:**


- Click **Create Agency**. The Create Agency and User Association screen appears.
- Define the agency. The Name field is required. The remaining fields are optional.
- Associate users with the agency by searching for them using the Search field, then select a user and click the > arrow to assign them to the agency. Only users who have a user role which requires an agency association will be displayed in the search results. If the users for this agency have not been created yet you will have an opportunity to create the agency association from the Create User menu option.
- Click **Save**.

The screenshot shows a web interface with two main sections. The top section, titled 'Create Agency', contains several input fields: 'Name' (marked with an asterisk as required), 'Address', 'City', 'State/Province', 'Zip/Postal Code', and 'Phone'. Below these fields is a legend indicating that an asterisk (\*) denotes a required field. The bottom section, titled 'User Association', is currently empty. At the bottom of the interface, there are two buttons: 'Exit without Saving' and 'Save'.

**Create Agency****To edit an existing agency:**

- Click the **Edit**  icon next to the agency you wish to edit. The Edit Agency and User Association window appears.
- Edit the agency information. The Name field is required. The remaining fields are optional.
- Add or subtract users using the User Association search field and the < or > arrows.
- Click **Save**.

**To delete an agency:**

- Click the **Delete**  icon next to the agency you wish to delete.
- The system will prompt you with an "Are you sure?" dialog before deleting. Click **Yes** to confirm your deletion.

## Manage Users

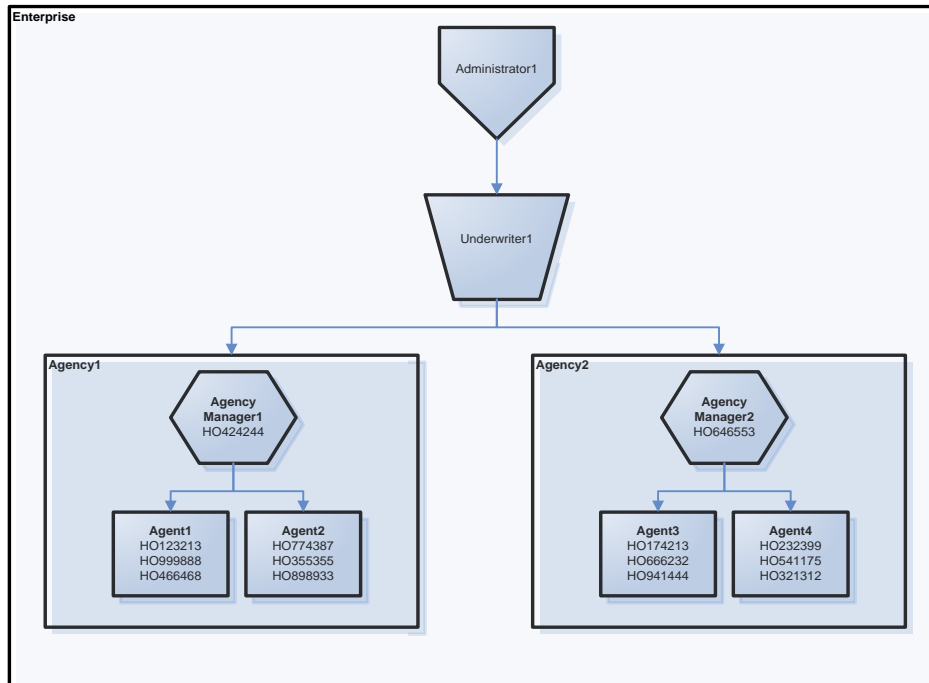
Use **Tools > Administration > Manage Users** to find existing users, create new users, and edit or delete existing users.

In RCT, access to valuations and some of the functionality is controlled by user role. Each user role has permissions associated with it which grant access to functionality such as InterChange and Hazard lookups. The user role also determines whether or not the user has access to only their own valuations or if they can access valuations created by others.

On a standard RCT site, there are generally four user roles with pre-defined access to valuation:

- Agents- belong to an agency and can only view and update their own valuations.
- Agency Managers- belong to an agency and can view and update all valuations belonging to themselves and agents in their Agency.
- Underwriter- does not belong to an agency and can view and update all valuations.
- Administrator- does not belong to an agency and can view and update all valuations, has access to Tools menu and can initiate ExpressLync web service calls if available.

Additional user roles can be added with varying permissions if required.



## User Roles

When you create a new user you will be assigning them to the appropriate user role which will determine their access.

### To find an existing user:

- In the **Find User** field enter the user last name, user ID, or agency and click **Search**. You can enter just a few characters instead of a complete name.
- You can filter or sort the results that are displayed to make it easier to find the specific result you are looking for. The filter and sort features work the same as they do on the Valuation dashboard.



## Manage Users




### To create a new user:


- Click **Create User**. The Create User and Agency Association window appears.
- Select a user role from the dropdown list.
- Define a user ID and password. (The User Role, User ID, and Password fields are required.). The password requirements displayed on the screen reflect the password settings your site administrator has selected for your site in Tools>Configuration Settings>Password Settings.
- Complete the remaining (optional) fields.
- To associate an agency for the user, enter an agency name in the Find Agency field and then select the desired agency and transfer it to the Associated Agencies list. Remember that not all user roles will allow an agency association.
- Normally you will only be allowed to associate the user with a single agency. However in some cases an RCT Express site may be configured to allow a user to belong to more than one agency. In that case, the agency association user interface will allow you to select multiple agencies to associate with the user.
- Click **Save**.

### Add User

#### To edit an existing user:

- Click the **Edit** icon  next to the user you wish to edit. The Edit User and Agency Association window appears.
- Make changes to any of the fields that you wish to edit. You can make a user inactive by deselecting the Active check box.
- Change any agency associations if desired.
- Click **Save**.

#### To delete a user:

- Click the **Delete**  icon next to the user you wish to delete. Be sure you want to delete a user and not just make the user inactive.
- The system will prompt you with an "Are you sure?" dialog before deleting. Click **Yes** to confirm your deletion.

# Broadcast Message

Administrators can create and send a broadcast message to RCT users. The message appears on the RCT Express dashboard.

**Note:** To remove a Broadcast Message before the broadcast end date, click **Stop Current Message**.

## To send a broadcast message:

- From the **Tools** menu, select **Broadcast Message**.
- Click in the **Broadcast Start Date** field and use the pop-up calendar to select a start date.
- Click in the **Broadcast End Date** field and use the pop-up calendar to select an end date.
- Type your message in the **Broadcast Message** field.
- Click **Submit**.



The screenshot shows a web form titled "Broadcast Message". At the top, there is a header bar with the title. Below the header, there are two date fields: "Broadcast Start Date" with the value "6/20/2014" and a calendar icon, and "Broadcast End Date" with an empty field and a calendar icon. Below these is a large text area labeled "Broadcast Message" with a vertical scrollbar. At the bottom of the form, there are three buttons: "Exit without Saving" on the left, "Stop Current Message" in the center, and "Save" on the right.

## Broadcast Message

# Change My Information

Use the **Change My Information** page to change your password or your e-mail address.

Change My Information is an option displayed to end users who log into RCT from a login screen. This option is not displayed to end users who are seamlessly transferred into RCT without passing through the log-in page.

## To change your password:

- From the **Tools** menu select **Change My Information**
- Enter your old password. (Passwords are case sensitive)
- Enter your new password. The system will prompt you if your password does not meet password strength requirements.
- Re-enter your new password to confirm.
- Click **OK**.

## To change your e-mail address:

- Enter your new e-mail address. Your current email address is displayed above the field for the new address.
- Click **Save**.



The screenshot shows the 'Change My Information' form. It has a title bar 'Change My Information' in a blue header. Below the header, there are several input fields: 'Old Password', 'New Password', and 'Confirm New Password', each with a text box. Below these is a message: 'Currently, there is no email address associated with this account.' followed by an 'Email Address' field. At the bottom left is a 'Default Language' dropdown menu currently set to 'English'. At the bottom right are two buttons: 'Exit without Saving' and 'Save'.

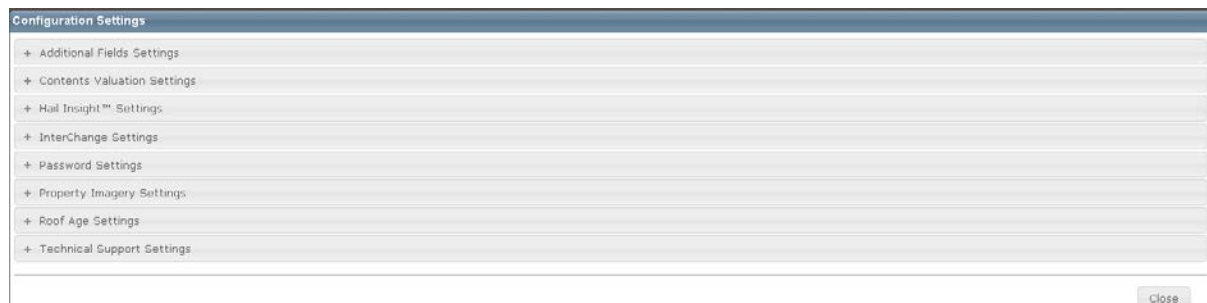
## Change My Information

You can also select the default language, either English or French.

# Configuration Settings

Use **Tools > Configuration Settings** to define additional fields settings, configurable RCT alerts, contents valuation settings, Hail Insight™ settings, InterChange settings, password-related settings (password options, password complexity options, and lockout options), property imagery settings, roof age settings, and technical support information.

**Note:** The displayed options depends on your licensing and administration settings



## Configuration Settings Options

### Additional Fields Settings

To access Addition Fields Settings go to the dashboard and select **Tools > Configuration Settings** and then click **+** next to **Additional Fields Settings**. Use this dialog to enable the feature and to enable additional fields for specific user roles.

Additional fields are client defined fields that can be used to pass through data that will not affect the calculation of reconstruction cost. Examples of how the additional fields can be used is for identifying a particular company or line of business that a valuation is being created for or for passing cost accounting data that is used for billing back to internal costs.

Additional fields can be enabled for specific user roles. When additional fields are used and displayed in a valuation, the information is included on the Standard, Detailed, and Comparison Reports. An administrator configures and manages additional fields. A user can view or enter information into the fields for a valuation (if their user role is enabled for this feature).

A separate function covered later in this manual covers how to set up the individual fields.

Configuration Settings

- Additional Fields Settings

Enable Additional fields:

Enable Additional fields for the following User Roles:

User Role	
Administrator	<input checked="" type="checkbox"/>
Agent	<input type="checkbox"/>
Agent Manager	<input type="checkbox"/>
Underwriter	<input checked="" type="checkbox"/>

Exit without Saving Save

+ Contents Valuation Settings

+ InterChange Settings

+ Password Settings

+ Roof Age Settings

+ Technical Support Settings

Close

### Additional Fields Settings

#### To enable additional fields:

- To enable the feature, select the **Enable Additional Fields** check box.
- Enable the feature for specific user roles by selecting the check box next to the desired user roles.
- Click **Save**. Click the - icon to collapse the Additional Fields settings. Click **Close** to close the Configuration Settings dialog and return to the dashboard.

### Contents Valuation Settings

To access this dialog select **Tools > Configuration Settings** and click the **+** to expand the Contents Valuation Settings dialog. Use this dialog to create an informational RCT Alert when the total estimated contents value exceeds the standard policy limit that is a percent of the reconstruction cost (Coverage A).

**Note:** Contents Valuation Estimates are a separately licensed service. This option will not be displayed on sites that do not have a Contents Valuation License.

When the estimate contents value exceeds the percentage entered here the system will display “The estimated contents value exceeds the standard personal property coverage limit of X% in the RCT Alerts slide-out panel.

The screenshot displays the MSB / RCT Express software interface. The main window shows a valuation page for a property at 100 Main Street, Milwaukee, WI 53210. The page is divided into several sections: Property Address, Building Information, Valuation Totals, and RCT Alerts. The RCT Alerts section is highlighted, showing a green alert for 'Main Home' stating: 'The estimated contents value exceeds the standard personal property coverage limit of 50%'. Below the alert, there are sections for Interior and Exterior features, including Kitchen, Bathroom, HVAC Systems, Basement Finish, Roof, Exterior Walls, Garages & Carports, and Porches, Decks & Breezeways.

## Valuation Page with Contents Alert

The screenshot shows the Configuration Settings page, specifically the Contents Valuation Settings section. The settings are as follows:

- Standard Contents Coverage %: 1
- Require household income level input to get a contents valuation:
- Display the household income disclaimer note on screens and reports:
- Display the estimated household income used to create the contents valuation on screens and reports:
- Contents Display on Reports:  Category Only  Category and Sub-category

Enable contents alerts for the following user roles:

User Role	Enable Alerts
adjuster	<input type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>
Agency Admin	<input type="checkbox"/>
Agency Manager	<input type="checkbox"/>
Agency Manager No Edit	<input type="checkbox"/>
Agency MR	<input type="checkbox"/>
Agent	<input type="checkbox"/>

## Contents Valuation Settings

**Note:** The alert generated in RCT Alerts will be "green" information only alert.

### To define the contents valuation settings:

- In the Standard **Contents Coverage %** field, enter the desired percentage of reconstruction cost that must be exceeded for an alert to be displayed.
- Select **Require household income level input to get a contents valuation** if you want to require income level as an input field.
- Select **Display the household income level disclaimer note on screens and reports** if you want to have a disclaimer appear. The note reads "Note: Contents estimate based on a default income level range" and will be in the RCT Alerts slide out panel.

- Select **Display the estimated household income used to create the contents valuation on the screens and reports** if you want to display the estimated income that is used to create the valuation on various screens and reports. If you do not want the income level displayed, uncheck the box. The note reads “Note: Contents estimate based on a household income of 46,000 to 75,000.” Those numbers are based on the selection criteria ranges chosen in the contents valuation dialog. Selection options noted below:

Less than 46,000  
 46,000 to 75,000  
 76,000 to 100,000  
 101,000 to 150,000  
 151,000 to 200,000  
 201,000 to 250,000  
 More than 250,000

Note: The disclaimer/note (when enabled) will appear on reports that show the details of the contents valuation and on the Valuation Totals screen below the contents valuation details when “more info” is selected. The contents estimate results will be displayed in the Standard, Detailed and Home Owner reports.

- Select either **Category Only** or **Category and Sub-Category** for the level of detail to be displayed on reports and the contents valuation screen.
- Enable RCT alerts for contents valuations for specific user roles by selecting the check box next to the user roles you want to enable.
- Click **Save**.
- Click **Close** to close the Configuration Settings and return to the main dashboard.

#### To manage and create Contents Alert:

You can create new alerts and edit existing alerts by selecting the appropriate link. Contents alerts can be created based on different conditions. If the defined conditions are met in the valuation and the alert is active, an alert message is displayed in the RCT Alerts panel either in the homeowner valuation screen, contents only valuation screen or both. You can compare multiple items in one rule by using “and” and “or” conditions.

Note: The alert generated in RCT will be a “green” information only alert.

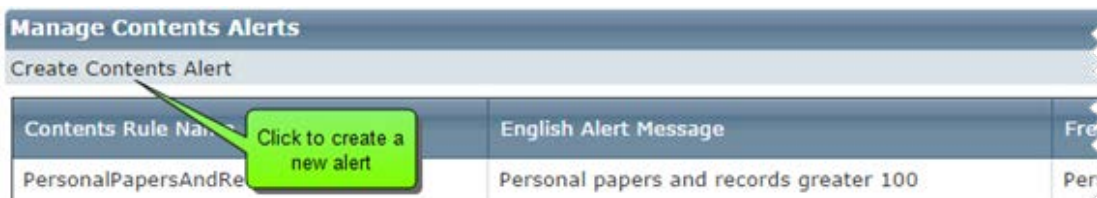
Manage Contents Alerts					
Create Contents Alert					
Contents Rule Name	English Alert Message	French Alert Message	Status	Rule Code	Options
Standard1	Standard1 alert triggered for IfEstimated Contents Value For Category (Apparel - Boy)is greater than[1] EN	Standard1 alert triggered for IfEstimated Contents Value For Category (Apparel - Boy)is greater than[1] FR	Active	CA0001	
ContentsOnly1	ContentsOnly1 alert triggered for IfEstimated Contents Value For Category (Sports, Recreation and Fitness)is greater than[2000] EN	ContentsOnly1 alert triggered for IfEstimated Contents Value For Category (Sports, Recreation and Fitness)is greater than[2000] FR	Active	CA0002	

#### Selecting to Create or Edit an Alert

As an example we will create a rule that states “If the value of artwork and collectibles exceeds \$1000 then display an alert message.”

### Step 1

- We'll create an example rule that states:
- "If the value of artwork and collectibles exceeds \$1000 then display an alert message."
- To create a new Contents Alert, click **Create Contents Alert**.



- The **Edit Rule** screen will open.

### Step 2

- Select **Contents Only**, **Homeowners Only** or **Both** for this rule. This determines where this Alert will be displayed either in Contents Only valuation screen, Homeowner valuation screen or both.
- Enter a **Contents Rule Name** and an **English Alert Message**. (You can also enter a French alert message)
- Select the **Active** check box to make the rule active. IF the rule is not active it will be not triggered.
- To start defining the rule, click in the blue shaded area.





### Step 3

- The "If" statement appears along with a drop down list of selections.
- For our example, we will select **Contents Category**.

– Contents Valuation Settings

Edit Rule

Contents Only
  Homeowners Only
  Both

\* Contents Rule Name

\* English Alert Message

French Alert Message

Active

Select a field or parenthesis from the menu; hit space bar to display dropdown selections

**If** (

**Contents Category**

Contents Sub-Category

This field displays instructions on what to do next...

### Step 4

- After we selected Contents Category, a drop down list of categories appears.
- We'll select "**Artwork and Collectibles**" for our example.

– Contents Valuation Settings

Edit Rule

Contents Only
  Homeowners Only
  Both

\* Contents Rule Name

\* English Alert Message

French Alert Message

Active

Type or select the parameter's value; hit space bar to display dropdown selections

**If Contents Category ( )**

Apparel - Boy

Apparel - Girl

Apparel - Infant and Toddler

Apparel - Men

Apparel - Women

Appliances

**Artwork and Collectible**

Auto Parts and Supplies

Boats, Watercraft and Accessories

## Step 5

- A set of comparison operators appears. We'll select "is greater than" for our example.

– Contents Valuation Settings

**Edit Rule**

Contents Only
  Homeowners Only
  Both

\* Contents Rule Name

\* English Alert Message

French Alert Message

Active

Select an operator from the menu; hit space bar to display dropdown selections

If Contents Category ( **Artwork and Collectible** )

Exit without
 

- is equal to
- is not equal to
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to

+ Hail Event Risk Settings

+ InterChange Settings

## Step 6

- We'll enter **1000** between the brackets.

– Contents Valuation Settings

**Edit Rule**

Contents Only
  Homeowners Only
  Both

\* Contents Rule Name

\* English Alert Message

French Alert Message

Active

Type the value; use Backspace to delete, Enter, or Right Arrow to complete

If Contents Category ( **Artwork and Collectible** ) is greater than [1000]

## Step 7

- Our rule is complete. Click anywhere outside the blue area and then be sure to click **Save**.

– Contents Valuation Settings

**Edit Rule**

Contents Only  Homeowners Only  Both

\* Contents Rule Name

\* English Alert Message

French Alert Message

Active

Click anywhere inside of the Rule Area to modify the rule

**If Contents Category ( Artwork and Collectible ) is greater than [1000]**

Click Save when done

- If you want to modify the rule, click anywhere inside the rule.

## Hail Insight™ Settings

To access the dialog select **Tools>Configuration Settings** and then click + next to expand the **Hail Insight™** dialog.

Hail Insight alerts are triggered based on threshold rule sets. Rules sets consist of an alert name, the alert message to be displayed and defined conditions based on hail damage risk score, roof age, roof cover material or groups of materials, and hail event window days. An alert can be based in a single condition or a combination of conditions. Rules can be active or inactive once they are defined. User roles must be enabled to receive alerts.

**Note:** Hail Insight is a separately licensed service. This option will not be displayed on sites that do not have a Hail Insight licensed.

### To enable User roles and manage Roof Cover Groups:

- Enable hail event risk alerts for specific user roles by selecting the check box next to the user role you want to enable.

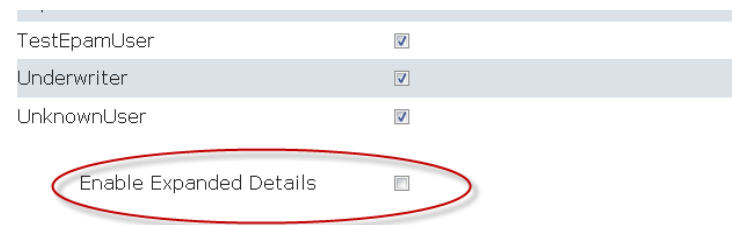


Configuration Settings	
+ Additional Fields Settings	
+ Contents Valuation Settings	
- Hail Insight™ Settings	
Enable Hail Event Risk alerts for the following User Roles:	
User Role	
adjustifier	<input type="checkbox"/>
Administrator	<input checked="" type="checkbox"/>
Agency Admin	<input checked="" type="checkbox"/>
Agency Manager	<input checked="" type="checkbox"/>
Agency Manager No Edit	<input type="checkbox"/>

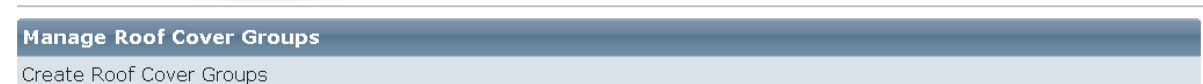
### Hail Insight Settings

#### To Enable Expanded Details:

- Place a check mark in Enable Expanded Details to enable expanded detail within the Hazard Descriptions. It controls details of Hail Insight information that will be displayed inside Hazard Summary.



TestEpmUser	<input checked="" type="checkbox"/>
Underwriter	<input checked="" type="checkbox"/>
UnknownUser	<input checked="" type="checkbox"/>
Enable Expanded Details	<input type="checkbox"/>




**Manage Roof Cover Groups**

Create Roof Cover Groups

### Enable Expanded Details

Roof cover groups can be created that contain multiple roof cover materials. The event alert can then reference a group instead of having to reference many individual materials.

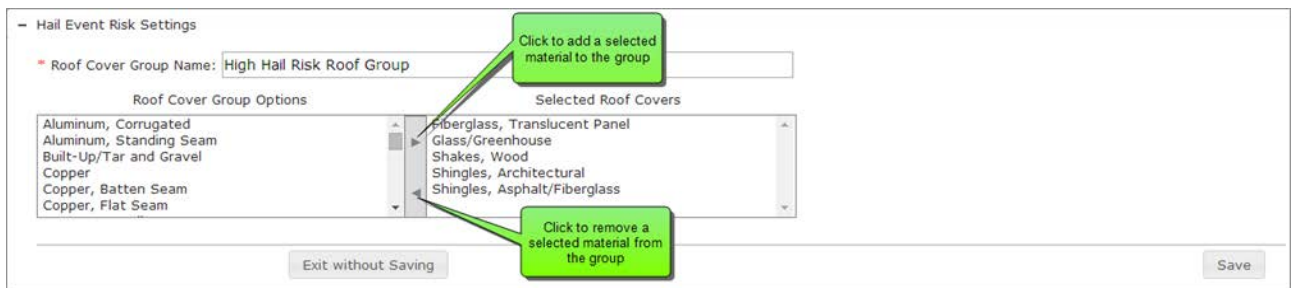
Manage Roof Cover Groups	
Create Roof Cover Groups	
Roof Cover Group Name	Options
High Hail Risk Roof Group	

### Manage Roof Cover Groups and Roof Cover Group Name

#### To Enable Manage Roof Cover Group Name:

Example:

In the example below, a group was created called "High Hail Risk Roof Group". The desired roof cover materials were added to the group.



Add or remove materials from the group by selecting the material and clicking the appropriate arrow. When you're finished defining the group, click **Save**.

Groups you've created can now be used when defining the hail event alerts. In the examples below, we'll use a group called the High Hail Risk Roof Group. This group would consist of all the roof cover materials that you have defined as being "high risk" to hail events. You could then check to see if the roof cover material defined in the valuation is included in that group.

Note that you do not have to define groups. Rules can be created that will check a single material. However, if you want to check more than a single roof cover material, it is easier to create a group containing them all.

#### To Manage Hail Event Alerts:

Hail event alerts can be created based on different conditions. If the defined conditions are met in the valuation and the alert is active, an alert message is displayed in the RCT Alerts panel.

The items that can be used in a rule are:

- **Hail Damage Risk Score:** This score (0-10) indicates the risk of hail damage. You can define a rule specifying a score for comparison. For example, you could create a rule that says "If Hail Damage Risk Score is greater than or equal to 7".

- **Hail Event Window Days:** This is the number of days since the last hail event. You can define a rule to check if a hail event has occurred within a specified time period. For example, you could create a rule that says "If Hail Event Window Days is less than 30".
- **Roof Age:** This is the roof age (as shown on the Building Information panel). You can define a rule that compares roof age. For example, you could create a rule that says "If Roof Age is greater than 20".
- **Roof Cover Group:** This is a group of roof cover materials that you have previously defined, specifying which roof materials are included in the group. You can define a rule to check if the roof material specified in the valuation is in the group.
- **Roof Cover Material:** You can define a rule that checks for a single roof material. For example, "Roof Cover Material is Copper".
- **Home Age:** This is the age of the home based on the Year Built for the main home.

You can compare multiple items in one rule by using "and" and "or" conditions. For example, you could create a rule that checks "If roof age is greater than 20 *and* the roof cover material is copper".

Another example of a rule is "If the roof age is greater than 20 years and the roof cover material is in a high hail risk group then display an alert message.

Here is a 10 step example of creating this rule:

### Step 1

To create a hail event alert, click **Create Hail Event Alerts**



Manage Hail Event Alerts		
Create Hail Event Alerts		
Hail Event Rule Name	English Alert Message	French Alert Message
Old Roof Depreciation	Roofs greater than 20 years require the depreciated value option	Roofs greater than 20 years require the depreciated value option
Inspect before Bind	Pre-existing roof damage inspection required before binding	Pre-existing roof damage inspection required before binding

The **Edit Rule** screen will open.

## Step 2

- Enter a **Hail Event Rule Name** and an **English Alert Message**. (You can also enter a French alert message)
- Select the **Active** check box to make the rule active. To start defining the rule, click in the blue shaded area.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Click inside of the Rule Area to begin a new rule

- click here to begin a new rule -

## Step 3

- The "If" statement appears along with a drop down list of selections. For our example, we will select **Roof Age**.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Select a field or parenthesis from the menu; hit space bar to display dropdown selections

**If**

(
 

- Hail Damage Risk Score
- Hail Event Window Days
- Roof Age
- Roof Cover Group
- Roof Cover Material
- Home Age

## Step 4

- After we selected Roof Age, a drop down list of operators appears.
- We'll select "**is greater than**" for our example.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Select an operator from the menu; hit space bar to display dropdown selections

**If Roof Age**

- is equal to
- is not equal to
- is greater than**
- is greater than or equal to
- is less than
- is less than or equal to
- is null
- is not null

without Saving

+ InterChange Se

+ Password Settir

+ Roof Age Setting

## Step 5

- A set of empty brackets appears where you can type the number of years for the roof age comparison.
- We typed "20".so now our rule says "If Roof Age is greater than 20". Pressing the right arrow key will make a drop down appear for our next part of the rule.
- We also want to check to see if the roof cover material is included in the High Hail Risk Roof group, so we'll select the "**And**" statement.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Use Left Arrow to edit the value; hit Space Bar and select a field to continue

**If Roof Age is greater than [20]**

- and**
- or

it without Saving



### Step 6

- After the "And" statement, we'll select the "Roof Cover Group".

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

**Roof Cover Group**

If Roof Age is greater than [20] and

(

Hail Damage Risk Score

Hail Event Window Days

Roof Age

**Roof Cover Group**

Roof Cover Material

+ InterChange Settings

+ Password Settings

### Step 7

- We want to see if the roof cover material used on the home is in the **High Hail Risk Roof Group** so we'll select the "in" statement.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Select an operator from the menu; hit space bar to display dropdown selections

If Roof Age is greater than [20] and **Roof Cover Group**

in

is null

is not null

Exit without Saving

## Step 8

- Clicking the right arrow key on the keyboard brings up the list of roof cover groups. We'll select the "**High Hail Risk Roof Group**". This group was created under the Manage Roof Cover Groups section of the dialog.

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Hit Space Bar to insert a new value; use Right Arrow to edit existing value

If Roof Age is greater than [20] and Roof Cover Group in

ALUM  
ALUM  
Aluminum Group  
Cynd's Roof group  
**High Hail Risk Roof Group**

+ InterChange Settings

## Step 9

- Click outside the blue shaded area to complete the editing of the rule. Now we have our complete rule. "If the roof age is greater than 20 years and the roof cover material is in the High Hail Risk Roof Group then display an alert message".

- Hail Event Risk Settings

**Edit Rule**

\* Hail Event Rule Name

\* English Alert Message

French Alert Message

Active

Click anywhere inside of the Rule Area to modify the rule

If Roof Age is greater than [20] and Roof Cover Group in High Hail Risk Roof Group

### Step 10

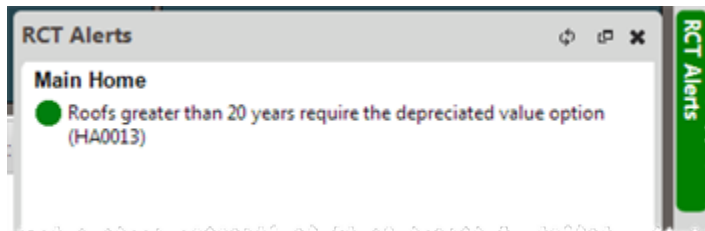
- After creating or editing a rule, be sure to click **Save**.



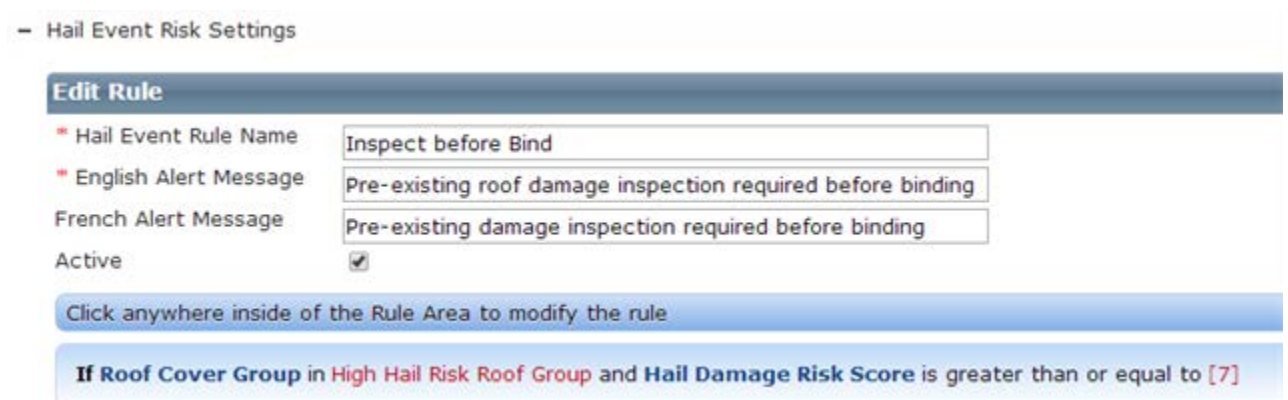
- If you want to modify the rule, click anywhere inside the rule.

Note: The alert generated in RCT Alerts will be a "green" information only alert.

Example of a hail event risk alert displayed in the RCT Alerts panel:



Another example of a rule is shown below:



This rule will check if the roof cover material for the property is in the High Hail Risk Roof Group and if the Hail Damage Risk Score is greater than 7. If so, then the message "Pre-existing roof damage inspection required before binding" will be displayed in the RCT Alerts panel.

Note: If the style of the home is set to "Condo" then the hail event rule sets will not trigger.

## InterChange Settings

To access this dialog select **Tools > Configuration Settings** and then click **+** next to InterChange Settings to expand the dialog. Use this dialog to enable or disable the display of InterChange confidence scores for specific user roles and to define the score alerts. The InterChange confidence scores are displayed on the Building Information Panel and the Overall Score is displayed on the Building Information Summary for any user role that is checked. If values are selected for the RCT alerts messages, the alerts will be displayed for any user role that has the InterChange confidence scores enabled.

Note: InterChange is a separately licensed service. This option will not be displayed on sites that do not have Interchange licensed. InterChange is used for addresses in the United States. Property Pre-fill is used for Canadian address. Property Pre-fill does not use Confidence scores. They are only active for U.S addresses.

**Configuration Settings**

- + Additional Fields Settings
- + Contents Valuation Settings
- **InterChange Settings**
  - Enable display of InterChange Confidence Score for the following User Roles:

User Role	Enabled
Administrator	<input checked="" type="checkbox"/>
Agent	<input checked="" type="checkbox"/>
Agent Manager	<input checked="" type="checkbox"/>
Underwriter	<input checked="" type="checkbox"/>

  - InterChange Confidence Score Alerts**
  - Display an alert to the user when the InterChange confidence scores are lower than the selected values:

Overall Score	High
Total Living Area Score	None
Year Built Score	None
Number of Stories Score	None
- + Password Settings
- + Roof Age Settings
- + Technical Support Settings

Buttons: Exit without Saving, Save, Close

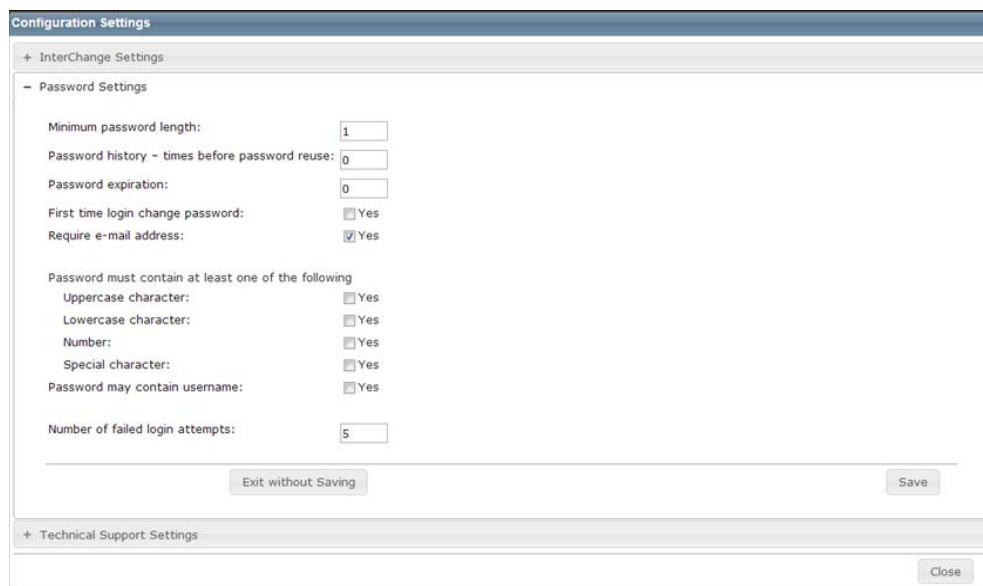
## InterChange Settings

**To define InterChange settings:**

- Enable the display of InterChange confidence scores for specific user roles by checking the box next to the user roles. You can select multiple roles.
- Define InterChange confidence score alerts for each score by using the drop down menus next to each score type. Select from None, Low, Medium, or High. An alert will be displayed in the RCT Alerts panel when a score is lower than the selected value.
- Click **Save**. Click the - icon to collapse the InterChange settings. Click **Close** to close the Configuration Settings dialog and return to the dashboard.

## Password Settings

Use the following settings to configure password security. To access Password Settings, click **Tools > Configuration Settings** and then click **+** to expand the Password Settings. When finished making changes click **Save**.



The screenshot shows a 'Configuration Settings' dialog box with a tree view on the left. The 'InterChange Settings' folder is expanded, and the 'Password Settings' sub-folder is selected. The main area contains the following settings:

Minimum password length:	<input type="text" value="1"/>
Password history - times before password reuse:	<input type="text" value="0"/>
Password expiration:	<input type="text" value="0"/>
First time login change password:	<input type="checkbox"/> Yes
Require e-mail address:	<input checked="" type="checkbox"/> Yes
Password must contain at least one of the following	
Uppercase character:	<input type="checkbox"/> Yes
Lowercase character:	<input type="checkbox"/> Yes
Number:	<input type="checkbox"/> Yes
Special character:	<input type="checkbox"/> Yes
Password may contain username:	<input type="checkbox"/> Yes
Number of failed login attempts:	<input type="text" value="5"/>

At the bottom of the dialog, there are three buttons: 'Exit without Saving', 'Save', and 'Close'.

## Password Settings

## Password Options:

### **Minimum password length:**

- This setting determines the minimum number of characters that a user's password must contain. The minimum password length is 1 and the maximum is 40.
- Suggestions for setting this feature based on the level of security desired are Low: 1 Medium: 6 High: 8.

### **Password history (times before password reuse):**

- This setting determines the number of unique new passwords that can be associated with a user account before an old password can be reused. This value must be between 1 and 100. Use 0 (or blank) to disable this feature.
- Suggestions for setting this feature based on the level of security desired are Low: Blank or zero Medium: 5 High: 20.

### **Password expiration:**

- This setting determines the amount of time (in days) that a password can be used before the system requires the user to change it. This value must be between 1 and 2147483648. Use 0 (or blank) to disable this feature.
- Suggestions for setting this feature based on the level of security desired are Low: Blank or zero, Medium: 90, High: 45.

### **First time login change password:**

- This setting determines whether users must reset their password when they first log on after a password configuration setting change or as a new user.
- Suggestions for setting this feature based on the level of security desired are Low: Unchecked (No), Medium: Checked (Yes), High: Checked (Yes).

### **Require email address:**

- This setting determines if users are required to enter an email address when resetting their password.
- Suggestions for setting this feature based on the level of security desired are Low: Unchecked (No), Medium: Unchecked (No), High: Checked (Yes).

### Password Complexity Options:

**Uppercase character:**

- This setting determines if users are required to use at least one uppercase character in their password. Using at least one uppercase character in conjunction with other characters increases the level of security.
- Suggestions for this feature based on the level of security desired are Low: Unchecked (No), Medium: Unchecked (No), High: Checked (Yes).

**Lowercase character:**

- This setting determines if users are required to use at least one lowercase character in their password. Using at least one lowercase character in conjunction with other characters increases the level of security.
- Suggestions for this setting based on the level of security desired are Low: Unchecked (No), Medium: Unchecked (No), High: Checked (Yes).

**Number:**

- This setting determines if users are required to use at least one numeric symbol in their password. Using numeric symbols such as 1, 2, 3 increases the level of security.
- Suggestions for this setting based on the level of security desired are Low: Unchecked (No), Medium: Unchecked (No), High: Checked (Yes).

**Special character:**

- This setting determines if users are required to use at least one special characters part of their password. Using special characters such as &, \*, !, %, \$ as part of the password increases the level of security.
- Suggestions for this setting based on the level of security desired are Low: Unchecked (No), Medium: Unchecked (No), High: Checked (Yes).

**Password may contain username:**

- This setting determines if the user name may be used as part of the password. Passwords that contain all or part of the user name create a possible security risk.
- Suggestions for this setting based on the level of security desired are Low: Checked (Yes), Medium: Checked (Yes), High: Unchecked (No).

Lockout Options:

#### Number of failed login attempts:

- This setting determines if users will be locked out of the application based on the number of failed login attempts. The value must be between 1 and 2,147,483,648. Use 0 (or blank) to disable this feature.
- Suggestions for this setting based on the level of security desired are Low: Blank or zero, Medium: 5, High: 3.

## Property Imagery Settings

The configuration settings for the Property Imagery feature are used to enable or disable automatic display of the panel as well as to enable the feature for specific user roles.

**Note:** Property Imagery is a separately licensed service. This option will not be displayed on sites that do not have a Property Imagery licensed.

Property Imagery Settings

**Auto Display**  
Enable automatic display of the Property Imagery panel when accessing valuations:

Yes   
No

---

Enable display of Property Imagery for the following User Roles:

**User Role**

Administrator	<input checked="" type="checkbox"/>
ADMLLPAdmin	<input type="checkbox"/>
ADMMAINAdmin	<input type="checkbox"/>
Agency Manager	<input checked="" type="checkbox"/>
Agent	<input checked="" type="checkbox"/>
Agent Manager	<input checked="" type="checkbox"/>
Sybility	<input type="checkbox"/>
Underwriter	<input checked="" type="checkbox"/>

### Property Imagery Settings

#### To configure Property Imagery settings:

- Select whether or not you want to automatically have the Property Imagery panel appear whenever a valuation is accessed. If set to No a user must click on the panel for it to open.
- Select which user roles are enabled for Property Imagery.
- Click **Save**.



## Roof Age Settings

To access Roof Age Settings select **Tools > Configuration Settings** and then click **+** next to Roof Age Settings. Use this dialog to set the minimum, roof age confidence score.

**Note:** Roof Age lookups are a separately licensed service. This option will not be displayed on sites that do not have a license for roof age.

Roof age lookups are address specific lookups that return both roof age and roof age confidence score.

The roof age confidence score is displayed on the Edit Building Information panel.

The roof age and confidence score may be updated by selecting **Options > Refresh Roof Age** on the valuation screen.

Roof age and roof age confidence score are displayed on the Standard and Detailed reports.

### Roof Age Settings

Options for setting the roof age confidence threshold are High, Medium, Low and Modeled. The minimum roof confidence score selected will determine the least acceptable confidence score to be provided for a given address. For example, setting the minimum confidence score to “Low” means that roof agrees with confidence scores of high, medium or low should be returned by the system and displayed to the end user, but that modeled scores should be excluded. In this example modeled roof age results would not be displayed and the roof age data entry field on the Building Information Panel would remain null unless the end user provides a roof age. To receive all returned roof age and confidence score results the minimum confidence score setting should be Modeled.

If the system provides a roof age, the roof age confidence score is displayed below the roof age field on the Building Information Panel. If the end user changes the roof age the confidence score is removed from the page since it no longer applies to the entered value.

#### To set the minimum roof confidence score:

- Use the drop down menu and select High, Medium, Low or Modeled.
- Click **Save**. Click the - icon to collapse the Roof Age settings. Click **Close** to close the Configuration Settings dialog and return to the dashboard.

## Technical Support Settings

Use the following settings to configure your technical support information. To access Technical Support Settings, select **Tools > Configuration Settings** and then click **+** to expand the Technical Support Settings. Click **Save** after making any desired changes.

Every RCT Express site can be customized with support contact information and instructions specific to the carrier.

Technical Support Settings

Email: Support@MSBInfo.com

URL: http://www.msbinfo.com

Phone: (800)809 0017

English instructions: This is internal site

French instructions: This is internal site

Additional English Instructions:

Additional French Instructions:

RCT Version: 4.3.0.1

Exit without Saving Save

### Technical Support Settings

Note: Valid user permission is required to edit any information on this page.

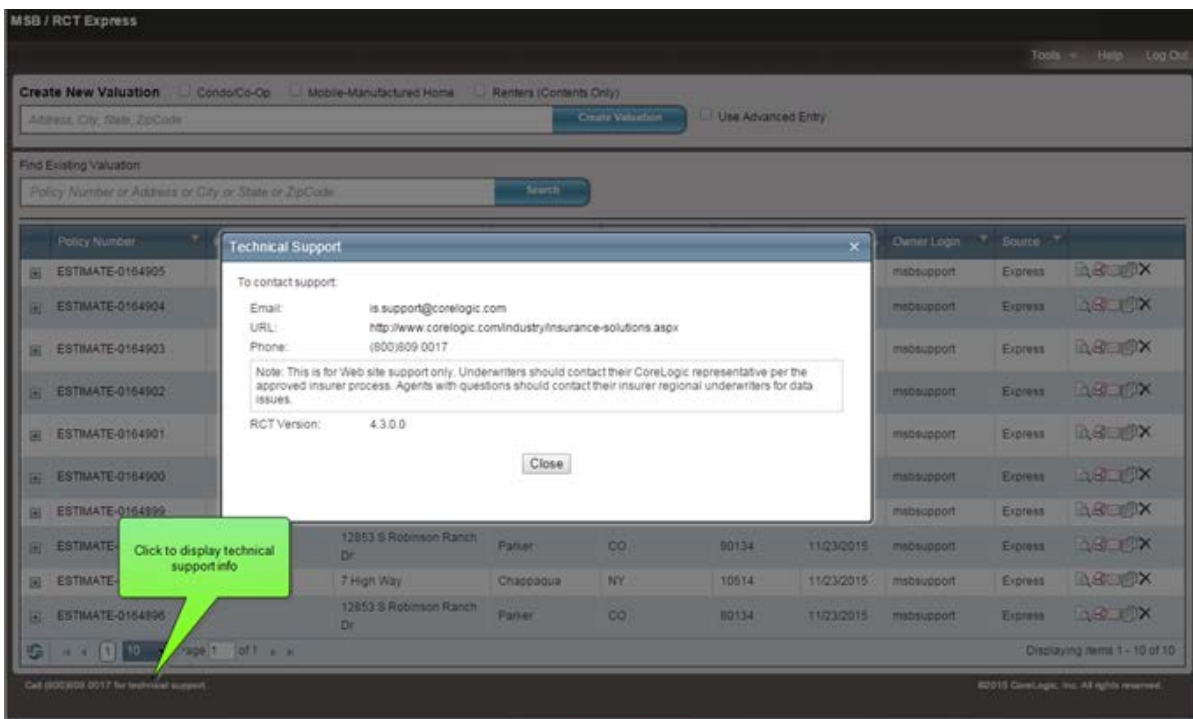
Information that can be edited includes:

- Email
- URL (website)
- Phone
- English instructions
- French instructions
- Additional English Instructions
- Additional French Instructions
- Version (The version number is display only cannot be edited)

Email addresses and URLs will be validated by the system.

After editing any information, click **Save**.

The technical support link is available in the bottom left corner from any screen in RCT Express. When the user clicks on the technical support link a pop-up is displayed with the information which has been entered above.



### Technical Support Link with Pop-up Display

If you defined Additional English Instructions or Additional French Instructions, they will appear on the Log In screen beneath the technical support link. Additional English and French instructions will not display if these fields are kept empty.



### Additional English/French Instructions

# Manage Additional Fields

From the dashboard, select **Tools > Manage Additional Fields** to display the Manage Additional Fields dialog where you can create and edit the fields.

Additional fields are client defined fields that can be used to pass through data that will not affect the calculation of reconstruction cost. Examples of how the additional fields can be used are for identifying a particular company or line of business that a valuation is being created for or for passing cost accounting data that is used for billing back internal costs.

A separate function covered previously in this guide covers how to enable the additional fields feature in RCT Express. That step of the Additional Fields configuration must be completed before this step can be executed.

Once an additional field has been defined it becomes a permanent part of the RCT Express database. In order to maintain data integrity, Additional Fields can be deactivated if they are no longer desired but they cannot be deleted. The Field Code must be unique and once established cannot be changed, but the Field Names (English and French) which are the labels that are displayed in the user interface and on reports can be changed.

The set-up controls whether an individual field is displayed in the user interface and whether end users are allowed to update those fields. This allows the additional fields to be updated and managed behind the scenes through ExpressLync4 web services without any visibility to end users in the user interface.


If the purpose of Additional Fields is to collect user input, the data types allow the possibility to collect free form entries or to provide dropdown lists of pre-established values from which to select.



## Manage Additional Fields

On the Manage Additional Fields dialog you can view the fields that have already been defined. The Field Code, Display Order, and Field Name are displayed.

You can create a new field by clicking **Create Additional Field**.

- You can edit an existing field by clicking the **Edit** button  in the **Options** column for the field you wish to edit.

**Note:** An explanation of all the options on the Create Additional Field dialogue is detailed at the end of this chapter of the workbook under Field Definitions.

Additional fields are enabled under **Tools > Configuration Settings**.

## Create Additional Fields

**To create Additional fields:**


- From the dashboard select **Tools > Manage Additional Fields**.
- On the Manage Additional Fields dialog, click **Create Additional Field**. The Create Additional Field dialog opens.
- Enter the desired information into each field. Required fields are indicated with a red asterisk (\*).
- Click **Save** when done. Repeat the procedure to create more Additional fields.

**Create Additional Fields**

## Edit Additional Fields

Note: An explanation of all the options on the Edit Additional Field dialogue is detailed at the end of this chapter of the workbook under Field Definitions.

**To edit Additional fields:**

- From the dashboard select **Tools > Manage Additional Fields**.
- On the Manage Additional Fields dialog, click the edit icon  for the field you wish to edit. The Edit Additional Field dialog opens. The field code and the date type cannot be edited.
- Enter the desired information into each field. Required fields are indicated with a red asterisk (\*).
- Click **Save** when done. Repeat the procedure to edit more Additional fields.

The screenshot shows a dialog box titled "Edit Additional Field" with the following configuration:

- Field Code:** DeliveryStatus
- English Field Name:** Delivery Status
- French Field Name:** État de la livraison
- Display Order:** 32
- Active:**
- Display:**  Yes  No
- Editable:**  Yes  No
- Data Type:** Integer

Buttons at the bottom: "Exit without Saving" and "Save".

### Edit Additional Fields

Field definitions:

#### Field Code

Enter a name used to identify the field. The field code is not displayed to the user. This field must be unique.

#### English Field Name

Enter a name for the field. This field name is displayed to the user.

#### French Field Name

Optionally, enter a French field name.

#### Display Order

Enter a numeric value for the order in which you want the fields displayed. The system will display an alert message if the number for the display order has been previously used for another field.

#### Active

Selecting the Active field makes the field eligible to be displayed to the user. The Display field can then be used to turn the display of the field on or off to the user. If Active is unchecked the field is now inactive and is not eligible to be displayed to the user regardless of the state of the Display field (Active has priority over Display). The active field is a quick way to turn the field on or off while keeping all the original settings for the field. Note that unchecking the Active field will hide the field going forward, but the field will still be displayed for previous versions of a valuation.

#### Display

If set to Yes, the user can see the field (if it is Active). If set to No, the user cannot see the field.

#### Editable

If set to Yes, the user can edit the information in the field. If set to No, the field is read-only and cannot be edited.

## Data Type

Select the data type for the field. It can be one of the following types:

- **Currency:** This format is used for dollar amounts. A \$ symbol is automatically inserted.
- **Date:** If the date format is selected for the data type, a calendar icon ( ) appears next to the field. A user can select the date from the calendar or type the date in mm/dd/yyyy format.
- **Decimal:** This format is used for decimal value entries.
- **Whole Number:** This format is used for integer values (no decimal places).
- **String:** This format is used for strings of alphanumeric characters.
- **Lookup:** This format is used to define values that can be selected from a dropdown list. The user can then select one item from the dropdown list when entering values in Additional fields for a valuation.

When you select Lookup as the data type the following fields appear:

\* Data Type:

Option/Lookup Value:

\* English Field Option:

French Field Option:

Add

### Date Type Lookup

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

\* Data Type:

Option/Lookup Value:

\* English Field Option:

French Field Option:

Add

Dropdown or Combo Box Options	
English Field Option	French Field Option
Example1	
Example2	
Example3	

### Date Type Lookup with Table

- **Multi-Lookup:** This format is used to define multiple values that can be selected. The user can then select multiple items when entering values in Additional fields for a valuation. When you select Multi-Lookup as the data type the following fields appear:

\* Data Type:

Option/Lookup Value:

\* English Field Option:

French Field Option:

Add

### Date Type MultiLookup

Enter a value in the field option (English or French) and click **Add**. Repeat for the additional values. As you enter them, they are shown in a table:

\* Data Type:

Option/Lookup Value:

\* English Field Option:

French Field Option:

Dropdown or Combo Box Options	
English Field Option	French Field Option
Example1	
Example2	
Example3	

**Date Type MultiLookup with Table**



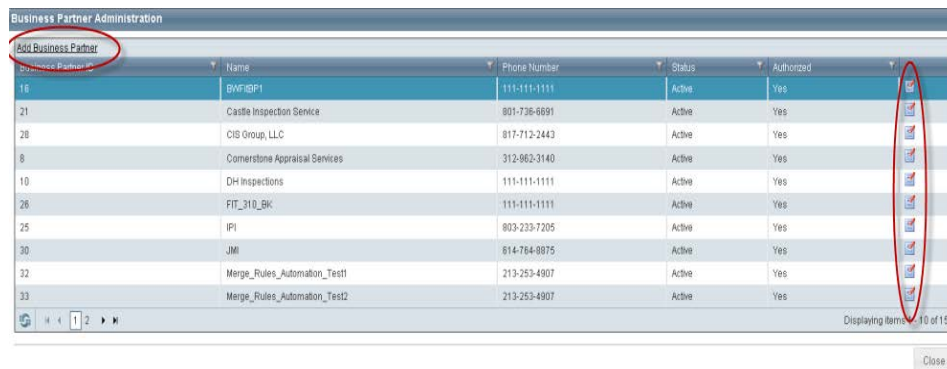
# Manage Business Partners

Before a business partner can use FIT to delivery inspection results to a carrier's RCT Express site, the carrier must add the business partner's company to its list of active business partners.

Note: FIT is a separately licensed service. This option will not display on sites that do not have a FIT license.

When a carrier adds a business partner, the system sends an email notification to the business partner that contains the URL of the RCT Express site and the business partner's user name and password.

Use the **Manage Business Partners** page to add new business partners (inspection companies) or edit existing business partners.



ID	Name	Phone Number	Status	Authorized
16	BWF/BPF1	111-111-1111	Active	Yes
21	Castle Inspection Service	801-736-6891	Active	Yes
28	CIS Group, LLC	817-712-2443	Active	Yes
8	Cornerstone Appraisal Services	312-862-3140	Active	Yes
10	DH Inspections	111-111-1111	Active	Yes
26	FIT_310_BK	111-111-1111	Active	Yes
25	IPJ	803-233-7205	Active	Yes
30	JMI	614-784-8875	Active	Yes
32	Merge_Rules_Automation_Test1	213-253-4907	Active	Yes
33	Merge_Rules_Automation_Test2	213-253-4907	Active	Yes

## Business Partner Administration

To add a business partner (inspection company):

- Select **Tools > Manage Business Partners**.
- Click **Add Business Partner**. The Add Business Partner dialog opens.
- Select the inspection company from the **Select Business Partner list**.

Note: If a current business partner's status is listed as Active, but the authorization is set to No, they will not be able to submit inspection data using FIT.

- Select the desired setting for the delivery option from the **Exterior** list. Also set the minimum number of attachments.
- Select the desired setting for the delivery option from the **In & Out** list. Also set the minimum number of attachments.
- Enter the user name and password. Enter the password a second time in the Confirm Password field for verification.
- Click **Save**.

Add Business Partner
✕

Enter the information and click Save to add the business partner.

* Business Partner:	<input type="text" value="BWFitBP2"/>		
Business Partner ID:	<input type="text" value="17"/>		
Contact Name:	<input type="text" value="Beverly"/>		
Phone:	<input type="text" value="111-111-1111"/>		
Email:	<input type="text" value="bwentz@marshallswift.com"/>		
Exterior:	<input type="text" value="Archive Inspection"/>	Min # of Attachments	<input type="text" value="0"/>
In & Out:	<input type="text" value="Archive Inspection"/>		<input type="text" value="0"/>
* Username:	<input type="text"/>		
* Password:	<input type="password"/>		
Confirm Password:	<input type="password"/>		
Status:	<input type="text" value="Active"/>		


Exit without Saving
Save

### Add Business Partner

You can change a business partner's information and status in the following ways:

- Change the delivery options
- Set the required number of attachments
- Change the business partner's status to inactive
- Change the business partner's password

To edit an existing business partner:

- Select **Tools > Manage Business Partners**.
- Click the **Edit** icon  for the business partner you wish to edit. The Edit Business Partner dialog opens. You can filter each column to help locate a business partner.
- Make the desired changes and click **Save**.

# Manage Underwriting Questions

This section covers the list of pre-defined FIT Underwriting Questions, and answers the ability of the carrier to allow answers outside of the provided answer list for some questions and the ability to create new FIT Underwriting Questions.

Please note that the required questions selected by the carrier are required for all the carriers' business partners. It is also the carrier's option to allow answers outside of the provided answer list for those questions for which the answer override flag is available.

Required questions and the ability to override the answer text vary from carrier to carrier. Inspection companies can determine precisely which of the underwriting questions are required by individual carriers and whether or not the carrier allows answers outside of the provided answer list by using the `GetInspectionQuestionConfiguration` web method from the `FIT ConfigurationService`.

Question Number	Underwriting Question	Question Required	Allow Answers Outside Default Set
Q0020	Was the property located for inspection?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Q0021	If no, why?	<input type="checkbox"/>	<input type="checkbox"/>
Q0022	How was the home occupied	<input type="checkbox"/>	<input type="checkbox"/>
Q0023	Is there a business on premises?	<input type="checkbox"/>	<input type="checkbox"/>
Q0024	Is there farming on premises?	<input type="checkbox"/>	<input type="checkbox"/>
Q0025	Is there a dog?	<input type="checkbox"/>	<input type="checkbox"/>
Q0026	What breed is the dog?	<input type="checkbox"/>	<input type="checkbox"/>
Q0027	Has the dog ever bitten anyone?	<input type="checkbox"/>	<input type="checkbox"/>
Q0028	Does the dog appear aggressive?	<input type="checkbox"/>	<input type="checkbox"/>
Q0029	Is there livestock on the property?	<input type="checkbox"/>	<input type="checkbox"/>
Q0030	Describe the feedback?	<input type="checkbox"/>	<input type="checkbox"/>

## Underwriting Questions

### To modify the underwriting question requirements:

- From the **Tools** menu, select **Manage Underwriting Questions**. The Underwriting Questions window appears.
- If you want a question to be required, select the **Question Required** check box. Inspectors are required to supply answers to the questions that you select.
- To allow inspectors to enter free-form answers, select the box in the column **Allow Answers Outside Default Answer Set**. If you do not select this check box, inspectors must choose from a list of predefined answers. You can view the currently defined answers by selecting the expand icon next to the question number.
- Click **Save**.

### To add a question:


- Click **Add Question**. The **Add Underwriter Question** dialog opens.
- Enter the desired question text.
- Enter the desired answer text. If you want additional answers, click **Add Answer**.
- If you want this to be a required question select the **Question Required** check box.

The screenshot shows a dialog box titled "Add Underwriter Question". It features a title bar with a close button (X). The main content area is divided into three columns. The first column, labeled "Question Text", contains a text input field. The second column, labeled "Question Required", contains a checkbox. The third column, labeled "Answers outside default answer set allowed", contains a checkbox. Below these columns is a section labeled "Answer Text" with a text input field and a link labeled "Add Answer". At the bottom of the dialog, there are two buttons: "Exit without Saving" and "Save".

#### Add Underwriter Question

- If you want answers that are different than the default answers allowed select the **Answers outside default answer set allowed** check box.
- Click **Save** on the Add Underwriter Question dialog.
- Click **Save** on the main Underwriting Questions screen.

#### To edit a user-defined question:

- Click the **Edit** icon  for the question you wish to edit. The Edit Underwriter Question dialog opens. The **Edit** icon only appears for user defined questions.
- Edit the question text.
- Edit the answer text. If you want additional answers, click **Add Answer**.
- If you want this to be a required question, select the **Question Required** check box
- If you want answers that are different than the default answers allowed, select the **Answers outside default answer set allowed** check box.
- Click **Save** on the Edit Underwriter Question dialog.
- Click **Save** on the main Underwriting Questions window.

# Reassign Valuations

Use **Tools > Administration > Reassign Valuations** to reassign valuations from one user to another.

In RCT Express, each valuation has an owner and the ability to edit and view a valuation based on ownership and user role. On a typical RCT site the user role permissions allow an end user with an agent user role to only access valuations that they have created. An end user with an Agency Manager role can typically view and edit any valuation that belongs to a user associated with their agency. Underwriters and Admin user roles can typically view and edit any valuation in the system regardless of ownership.

Therefore when there is turnover at an agency, there may be the need to reassign the ownership of the valuations from the agent who is leaving to a different agent. The reassign function allows you to reassign the ownership of all or some of the valuations from one user to another.

Additionally before a user can be deleted from the system RCT checks to make sure that there are no remaining valuations assigned to that user.

## To reassign all the valuations from one user to another:

- In the **Find Current Owner** field enter the agency, user ID, or last name of the user whose valuations you want to reassign. A grid displays showing all the results that match your search parameters.
- Select the owner of the policies that you want to reassign,
- In the **Find New Owner** field enter the agency, user ID, or last name of the user that you want to be the new owner. A grid displays showing all the results that match your search parameters.
- Select the user that you want to be the new owner of the valuations.
- To reassign all the valuations from one user to another, select **Reassign all valuations from one user to other user**. Note that depending on the number of valuations the user has associated with them, this process may take a couple of hours to complete.
- Click **Save**.

## Reassign Valuation

**To reassign specific valuations from one user to another:**

- In the **Find Current Owner** field enter the agency, user ID, or last name of the user whose valuations you want to reassign. A grid displays showing all the results which match your search parameters
- Select the owner of the policies that you want to reassign
- In the **Find New Owner** field enter the agency, user ID, or last name of the user that you want to be the new owner. A grid displays showing all the results which match your search parameters
- Select the user that you want to be the new owner of the valuations.
- To reassign specific valuations from one user to another, select **Select valuations to reassign**. A grid displays allowing you to select specific valuations. You can filter the list to help you find specific items.
- Check the valuations you want to reassign.
- Click **Save**.

