



## Policy Upload – Process in ResWare®

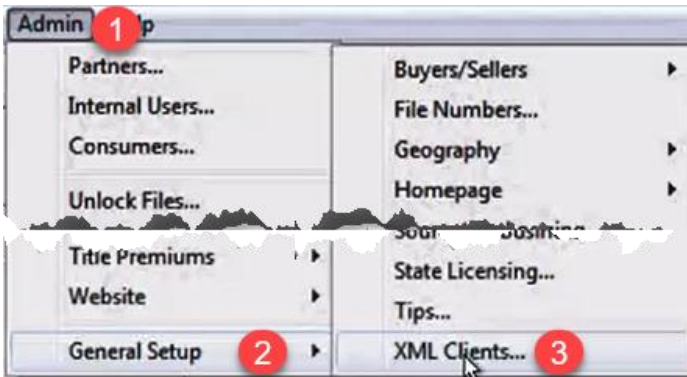
Learn how to set up the Policy Upload feature as a system administrator and upload final Policies directly from your ResWare® file, using the AgentNet® Integration.

### Setup Policy Upload

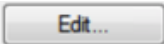
To initiate the Policy Upload process, you must first map the proper XML client in the Admin screen.

Beginning from the ResWare main screen:

1. Click **Admin** tab
2. Select **General Setup**
3. Select **XML Clients**



**NOTE:** The **Administer XML Clients** screen opens displaying available **XML Clients**.

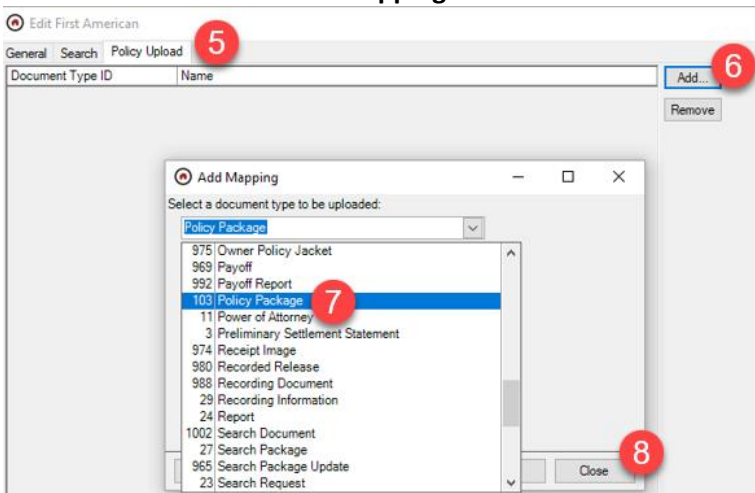
4. In the **Administer XML Clients** screen:
  - A. Click the **Enabled** checkbox next to **First American**, if necessary
  - B. Click **First American URL**
  - C. Click 

5. In the **Edit First American** window, click **Policy Upload** tab

6. In the **Policy Upload** screen, click **Add**

**NOTE:** The **Add Mapping** window opens displaying a list of **Document Types** to upload.

7. In the **Add Mapping** window, select **Policy Package**
8. Click **Close** to close the **Add Mapping** window

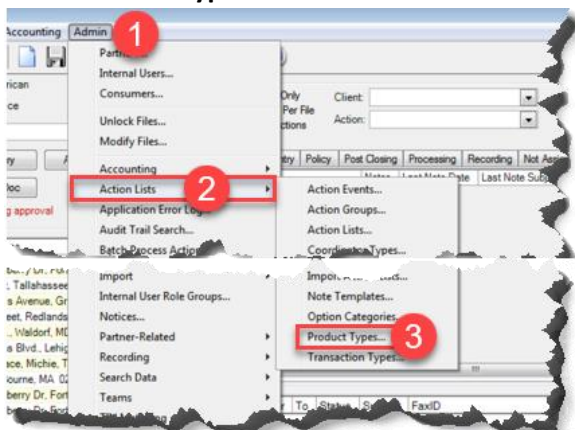


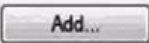
**NOTE:** The Setup Policy Upload process is only required one time.

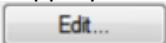


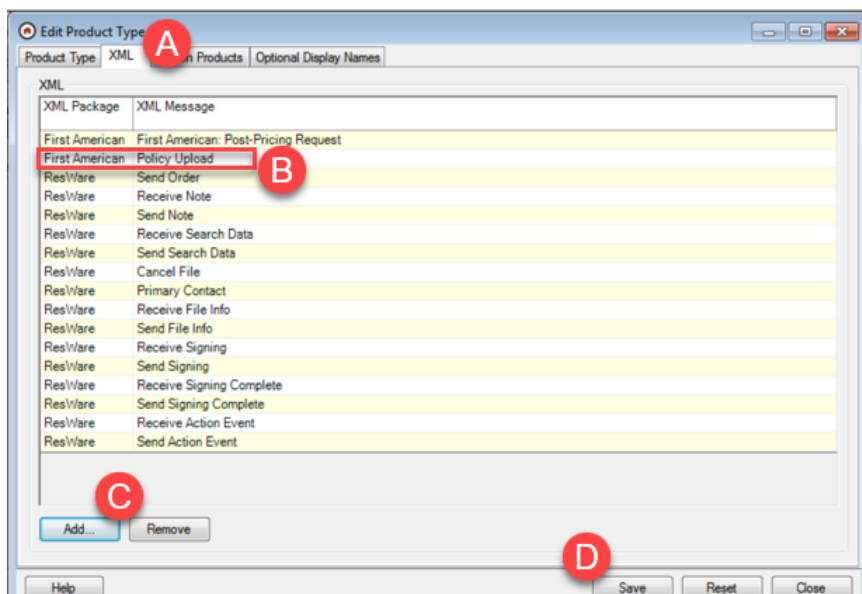
## Add Product Type

1. Click **Admin** tab
2. Select **Action Lists**
3. Select **Product Types**



**NOTE:** The **Administer Product Types** window opens displaying available **Product Types**. If the applicable **Product Type(s)** is/are not displayed, click .

4. In the **Administer Product Types** window:
  - A. Click the **Enabled** checkbox next to the applicable **Product Type**, if necessary
  - B. Select appropriate **Product Type**
  - C. Click 
  - D. Repeat steps A through C to add additional Enabled **Product Types**, if needed
5. In the **Edit Product Type** window:
  - A. Click **XML** tab
  - B. Select **First American Policy Upload XML Package**
  - C. Click **Add**
  - D. Click **Save**

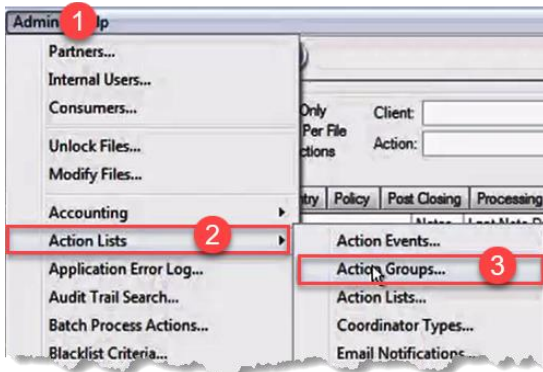


**NOTE:** If the **First American XML** package is already displayed, select it and click **Remove** to re-add the package.



## Add Action Group

1. Click **Admin** tab
2. Select **Action Lists**
3. Select **Action Groups**



**NOTE:** The **Administer Action Groups** window opens displaying available **Action Groups**.

4. In the **Administer Action Groups** window:
  - A. Click the **Enabled** checkbox next to the applicable **Action Group- 'Policy'** option, if necessary
  - B. Select the **'Policy'** Action Group
  - C. Click
  - D. Repeat steps A through C to add additional **Action Groups**, if necessary

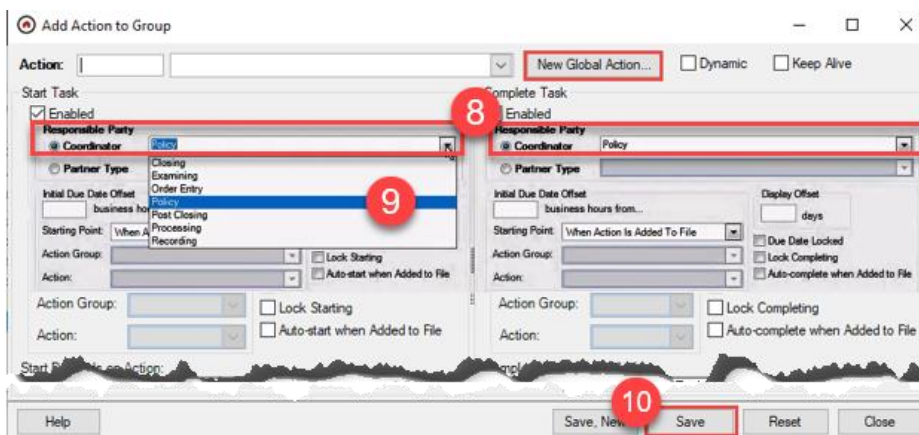
**NOTE:** Make sure to add only Action Groups that are used on your files.

5. In the **Edit Action Group Actions** window, click
6. In the **Add Action to Group** window, click **New Global Action** to add an action for the **Policy Upload** feature
7. In the **New Global Action** window:
  - A. Add an **Action Name- 'Policy Upload'**
  - B. Click

8. In **Start Task** and **Complete Task** sections, click **Coordinator** radio button under **Responsible Party**
- NOTE:** Be sure the **Enabled** checkbox is checked in both **Start Task** and **Complete Task** sections.

9. Select **Policy** from the drop-down options

10. Click

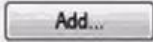


**NOTE:** The **Edit Action Group Actions** screen is opened with the **New Action** displayed.



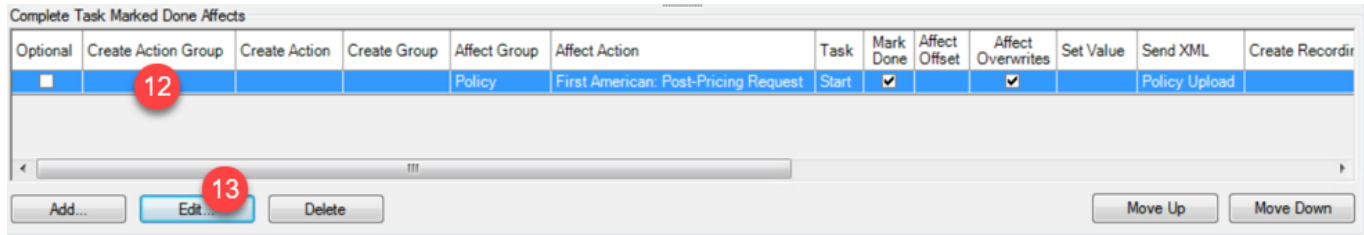
11. Double-click on the **New Action Name- 'Policy Upload'** to edit action affects

**NOTES:**

- The **Edit Action Affects** window opens displaying the selected task information
- If the new **Policy Upload** task does not appear on the screen, you will need to click  to add the task

12. In the **Complete Task Marked Done Affects** section, click the checkbox for the selected Task

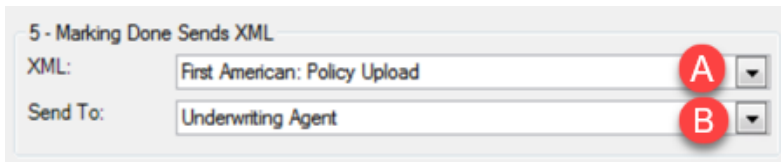
13. Click **Edit**



14. In the **Edit Task Affect** window, **Marking Done Sends XML** section, select/edit:

A. XML: **'First American: Policy Upload'**

B. Send To: **'Underwriter'**



C. Click 

D. In the **Edit Action Group Actions** screen, click 

## Complete Policy Upload

1. From the **Policy** tab, generate a Policy in your file

**NOTES:**

- In the **Documents** tab, make sure the **Document Type** mapped for **Policy Upload** is displayed
- If the transmission is successful, a **Note** will be added to the file indicating the Policy has been added to the file
- If the transmission is not successful, or the upload requirements are not met, you will get an error message and a Note is added to the file

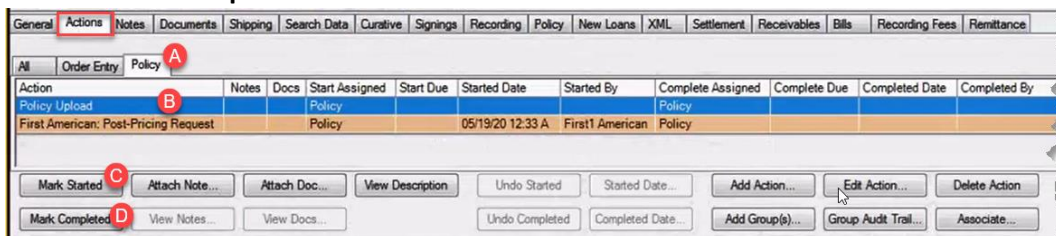
2. From the **Actions** tab:


A. Select **Policy** tab

B. Highlight the **Action: 'Policy Upload'**

C. Click **Mark Started**

D. Click **Mark Completed**



**NOTE:** The completed Policy is uploaded to the server and is available to view or edit in  format. You can upload the edited policy to the server if you choose.