



ATE Panel: Quick Guide



Having relaunched the Box Legal website in December 2011 (www.boxlegal.co.uk), we wanted to ensure that all of our clients are finding the new site as easy to use as possible. The ATE Panel is the place where you can buy new and administer existing ATE policies. This *Quick guide* is designed to introduce you to the new panel design and to help you find your way around it. However, if there's anything we haven't covered here, don't hesitate to get in touch. We're here to help.

ATE Panel: Purchase new and administer existing policies

Actions Menu
From the 'Actions Menu' you can purchase new and administer existing policies.

Change View
Select 'Change View' and choose alternative data options to display (Up to a Maximum of 4). The image at the foot of the page illustrates the options available.

Search Criteria
Use any or all of the search criteria provided to find the information you're looking for.

Commence Search
Once you've selected your preferred search criteria click the 'Search' button to begin. Clicking on 'Search' without selecting any criteria will display all of your policies.

Search Results
The total number of records produced by a search (349 in this example) are shown here.

Cycle Through Search Results
When more than 15 policies have been produced by a specific search clicking on these arrows will allow you to cycle through them.

Policy List
Up to 15 policies are displayed on screen at one time.

View Policy Details
Click on any of the data elements in the row to view policy details.

Export to Excel
Download the results of a search as an Excel spreadsheet

Print Results
Print the results of a search.

Block Changes
To make the same change to one or more policies simultaneously select the individual policies by ticking the corresponding boxes at the beginning of each row.

Alternatively select all policies shown on the screen by ticking the 'Select all' box.

Once you have selected the policies you wish to amend simply click on one of the four actions shown in the blue bar to apply it.

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The screenshot shows the ATE Panel interface. On the left is an 'Actions Menu' with categories: My Policies, Policy Purchase, Policy Admin, Policy Claims, Rehabilitation, and Other. The main area has 'Search' and 'Change View' tabs. Below the tabs are search criteria fields: Policy no., Client surname, Case referrer, Solicitor ref., Fee earner email, Proceedings Issued, Requests between, and DD/MM/YYYY. There are also dropdowns for Accident type and Policy status. A 'Search' button and a 'Clear' button are present. Below the search area are 'Export to Excel' and 'Print results' buttons. A table displays search results with columns: Client full name, Fee earner email, Off cover date, and Policy number. The table contains 15 rows of data. At the bottom of the table is a blue bar with actions: 'Cancel all selected', 'Change email address', 'Print certificate', and 'Amend accident type'.

Search/Change View Panel
The image to the right shows the 'Change View' panel from the top of the page. Use the two tabs to switch between the 'Search' and 'Change View' panels.

In 'Change View' (seen here) select the data types you'd like to view by ticking the respective boxes alongside each options. Click on the 'Update Columns' bar to update the column headers.

The 'Change View' panel shows a grid of checkboxes for selecting data types to display. The checkboxes are arranged in two columns. The first column includes: Accident date, Client DOB, Fee earner email, and Premium. The second column includes: Age of policy, Client full name, Insurance status, and Proceedings issued. The third column includes: Cancellation date, Client postcode, Off cover date, and Referral company. The fourth column includes: Cancellation reason, Client surname, On cover date, and Solicitor ref. The fifth column includes: Client address, Defendant full name, Policy number, and Accident type. At the bottom of the grid is an 'Update Columns' button.