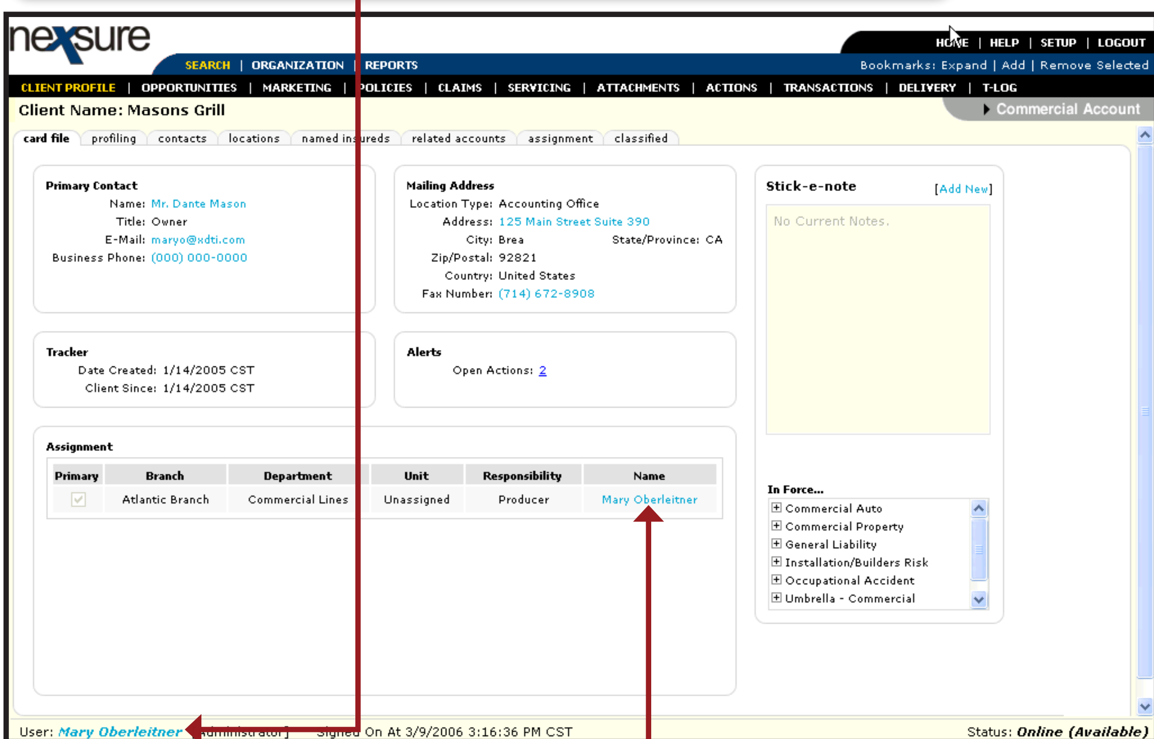
In This Issue

- Employee Availability

Employee Availability

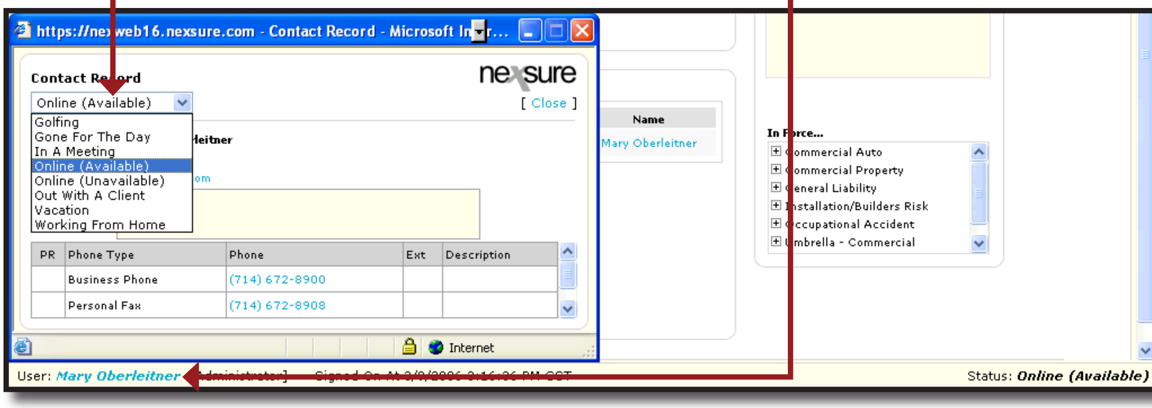
After logging into Nexsure your name is displayed as an active link at the bottom of the screen and is present on most screens.



If your name is added as an assignment to a client or policy, these will be active links as well.

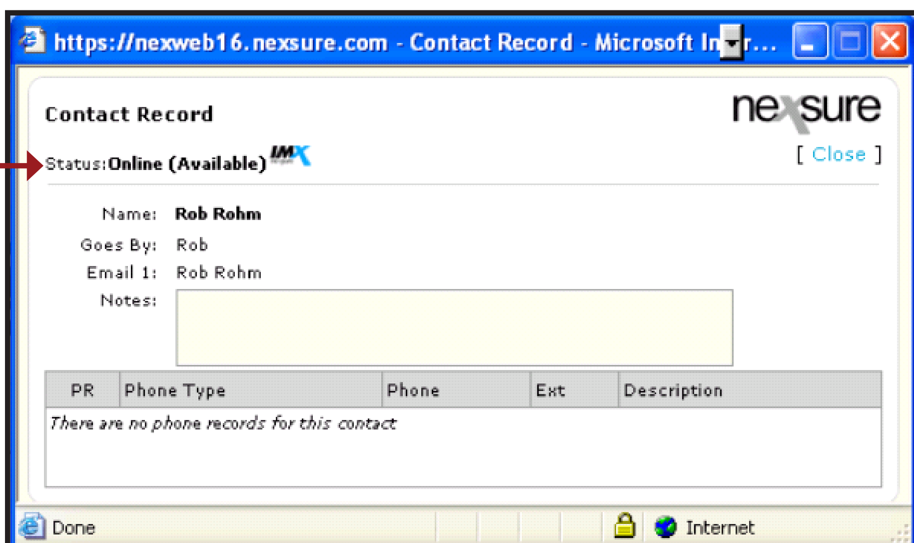
1. Click on your name when the link is active.

2. After clicking on your name, use the drop-down box to indicate your availability to others.



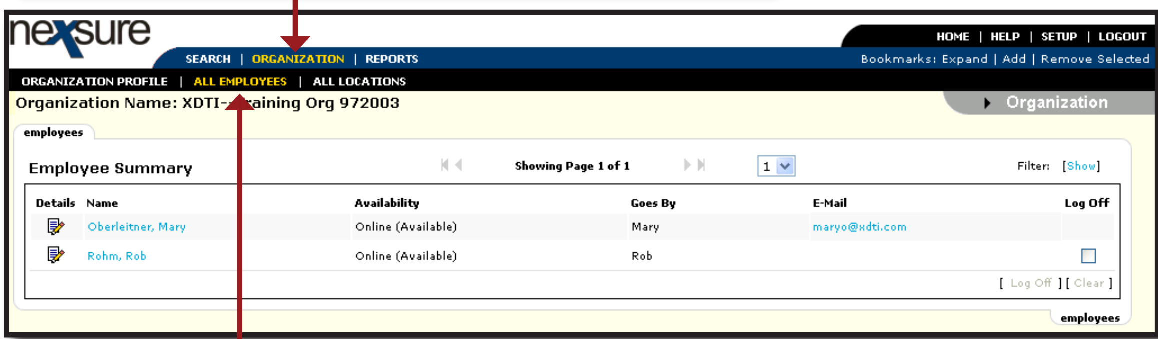
Employee availability may be found in two different places. If the user has changed their status to unavailable, they prefer not to be disturbed by instant messages.

Clicking on any employee name will bring up the Contact Record. The status of the employee is located at the top of the pop-up window.



The other place where availability can be seen is at Organization level.

Click the **ORGANIZATION** link on the Primary menu.



Click the **ALL EMPLOYEES** link.

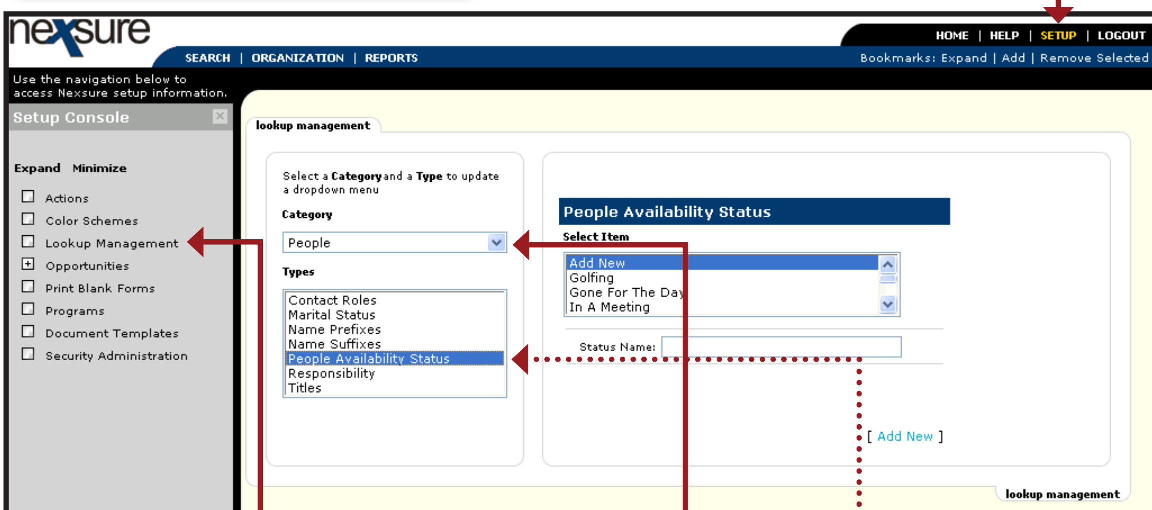
By default, all employees with an availability status of online are displayed.

Adding or Modifying People Availability Selections

Lookup Management contains fields that may be modified by the organization. Keep in mind when making additions or modifications that these affect everyone in your organization. Once status has been used, it may not be removed from Nexsure. Instead of being deleted, a warning message will be displayed advising that the status is in use. The status name may be changed, but it will be changed on all records that are currently in use.

Accessing Lookup Management

1. Click the **SETUP** link located on the Utility menu.



2. Click the **Lookup Management** link.
3. Use the drop-down Category box to select **People**.
4. In the Types list, select **People Availability Status**.

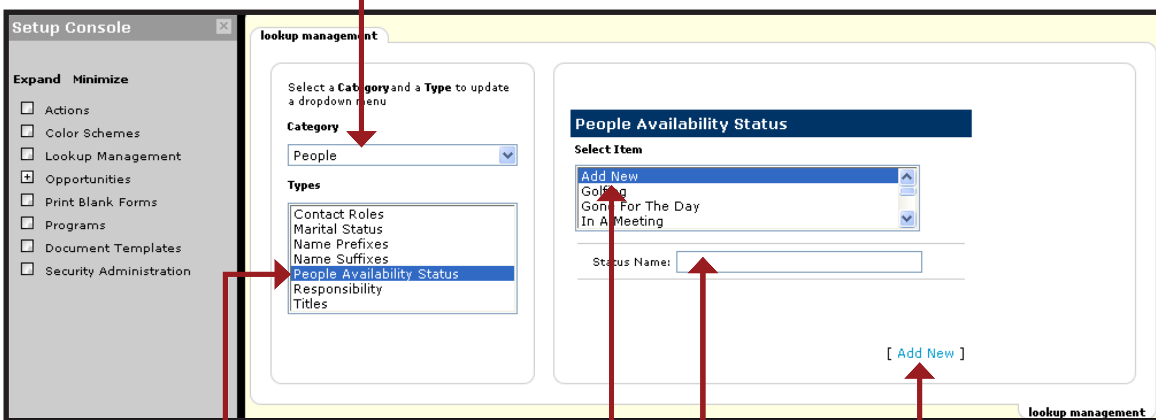
TIP: If your staff uses the Employee Availability status feature, you may want to include the word "online" as part of the Status Name such as "Vacation - Online". By doing this, any employee currently online will be displayed in the summary view on the Organization > All Employee screen without changing the default view.

Only those items in the **Select Item** box that do not have a gray font may be modified.

Use the following directions to add, modify or delete items for all Categories:

Adding an Item

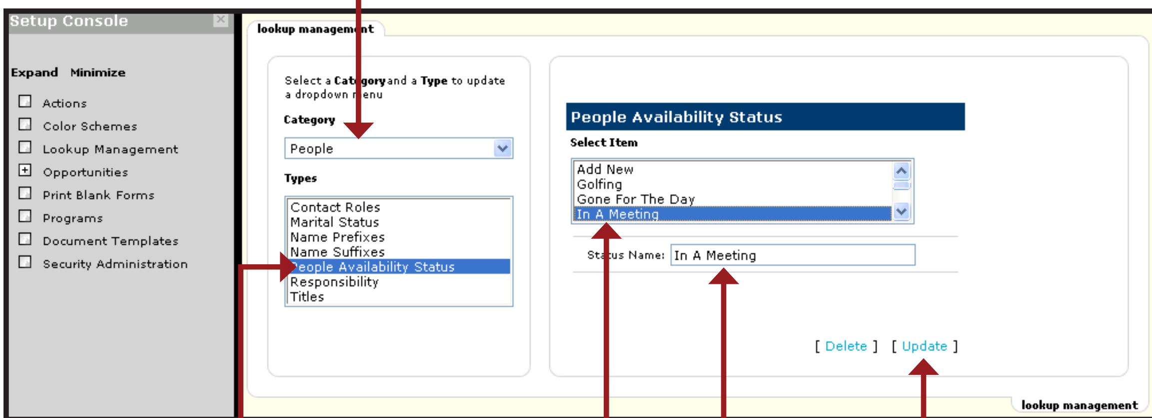
1. Begin by selecting the Category titled **People**.



2. Select **People Availability Status** as the Type.
3. To add a new status, at the top of the select items list, click **Add New**.
4. Below the list is an empty field labeled Status Name. Click in the field and enter the new status.
5. Click the **[Add New]** link below the field to add the status.

Modifying an Item

1. Begin by selecting the Category titled **People**.



2. Select **People Availability Status** as the Type for modification.

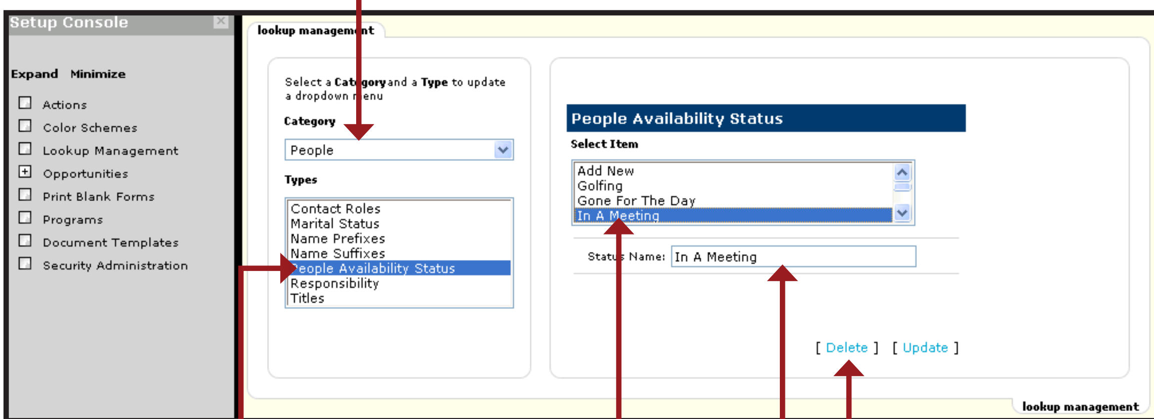
3. Locate the appropriate status in the list and click on it to highlight it.

4. The name is now displayed in the field below the list beside the type label, modify as necessary.

5. Click the **[Update]** link to save the changes.

Deleting an Item

1. Begin by selecting the Category titled **People**.



2. Select **People Availability Status** as the Type for deletion.
3. Locate the appropriate status in the list and click on it to highlight it.
4. The name is now displayed in the field below the list beside the type label, modify as necessary.
5. Click the **[Delete]** link to remove.

- If the status has been used, a message is displayed advising that the status is in use and may not be deleted.

- If the status is not in use, a message is displayed asking for deletion confirmation. After confirmation is provided the status is removed.