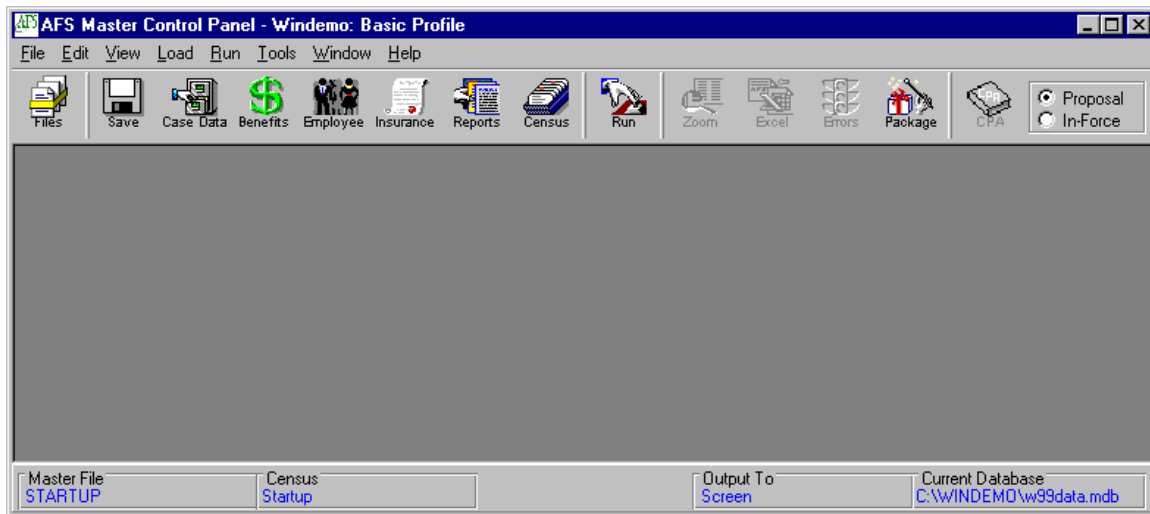




Overview of the AFS Master System®

AFS Master Control Panel

The AFS Master Control Panel is the key to operating the system. It is what you see when you first enter the Master System. If you close the Master Control Panel, the system will shut down (after you confirm this choice, of course).



There are four main areas on the AFS Master Control Panel:

- The Menu Bar
- The Toolbar
- The Input Windows Region
- The Status Bar

The Menu Bar, at the top of the control panel, allows you to:

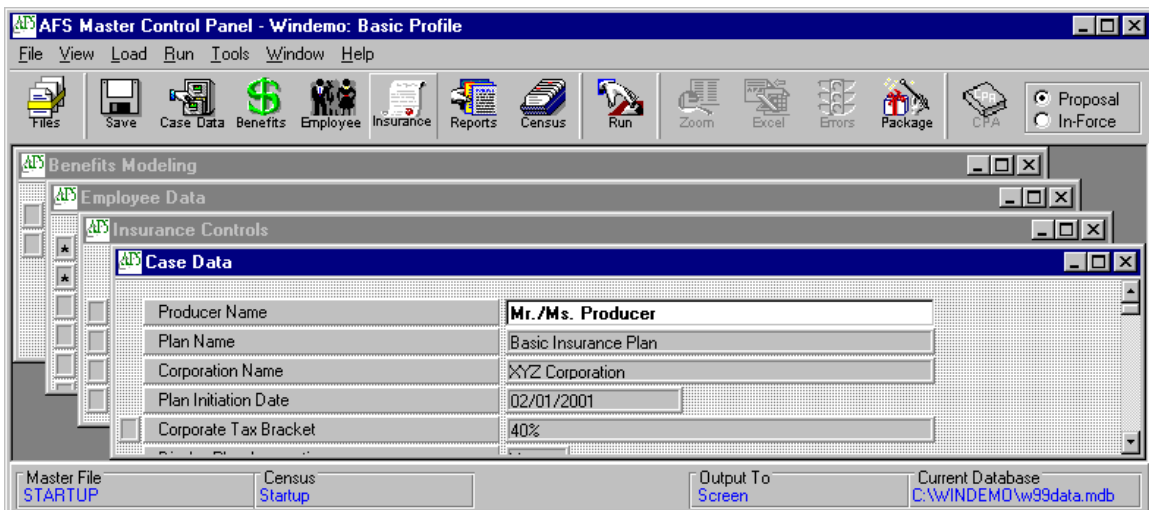
- open, save, import, export, and print your files (File)
- copy, cut, paste and otherwise edit your census files (Edit)
- change the look of the system (View and Tools)
- copy data from other master files (Load)
- run or terminate cases (Run)
- verify downloaded policy data (Tools)
- configure the system (Tools)
- open or rearrange other windows (Windows)
- get help on the system (Help)



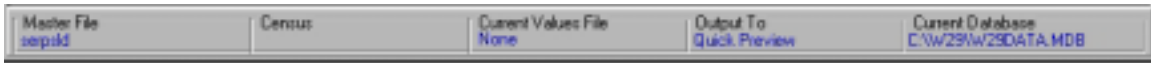
The Toolbar, just below the menu bar, allows you to click buttons as shortcuts to open key windows and to perform other principal functions. Toolbar buttons are further described below.



The Input Windows Region, the large central portion of the control panel, is where the four main master file input windows appear (Case Data, Benefits Modeling, Employee Data, and Insurance Controls), along with the Census File Manager. If you want more room in this area, the Master Control Panel can be resized to fill your screen, if it does not already. You can use the View menu options to suppress the toolbar and status bar to give you more room.

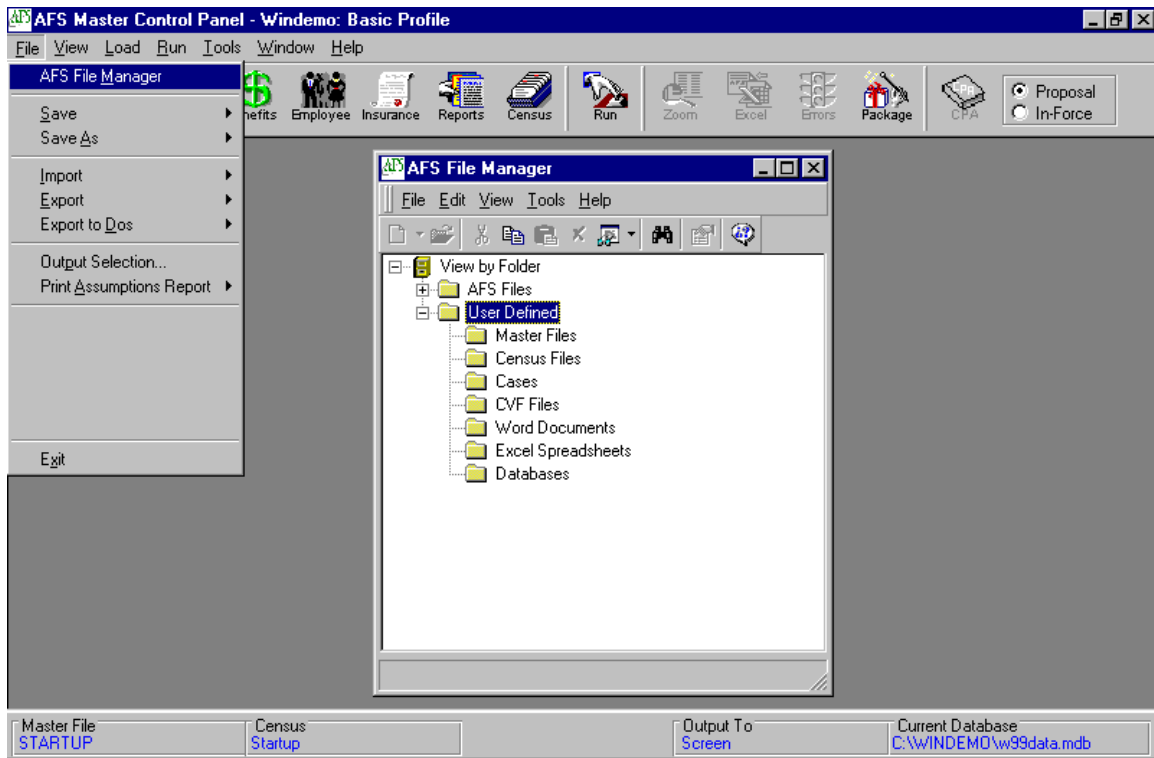


The Status Bar appears at the bottom of the Master Control Panel. The status bar tells you which master, census, current values files (CVF, for in-force only), output to device and the current database name are currently loaded. You can also have 'fly-over' help (help that appears in yellow balloons as you move your cursor around), or you can turn it off, using the Tools / Options menu.

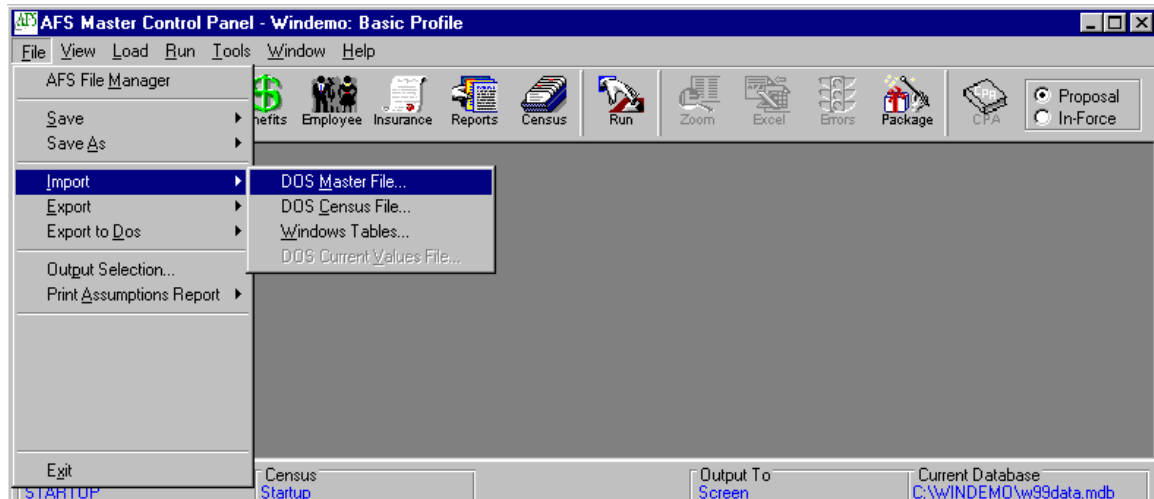


Menu Bar Detail - File

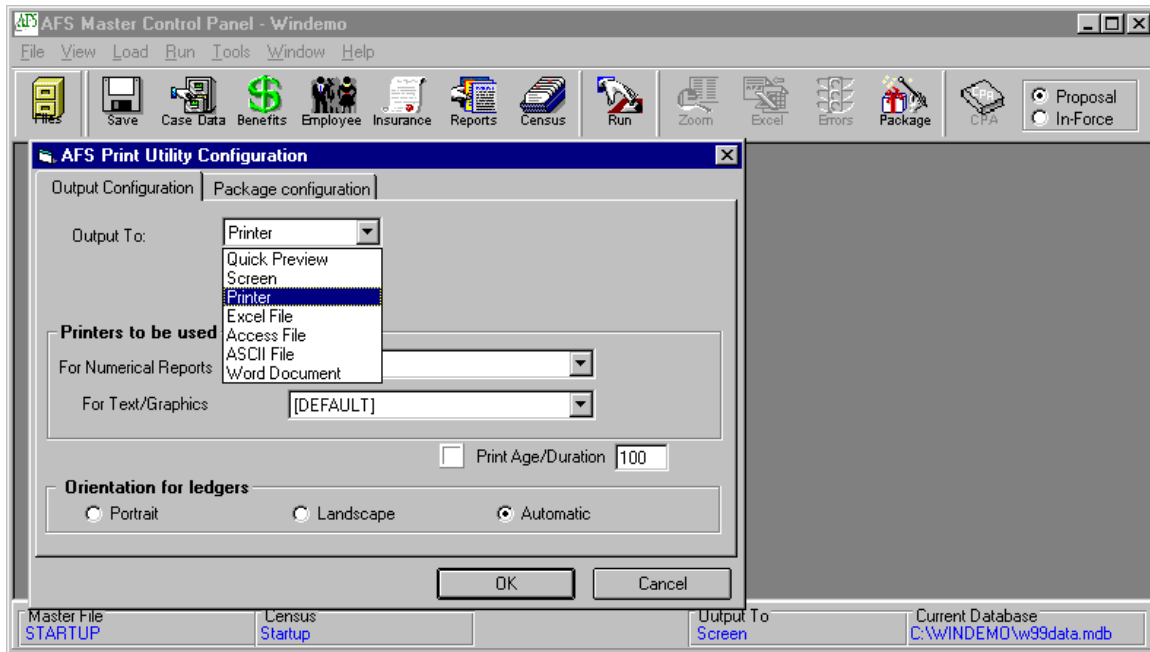
The **File Manager** is where you will store and retrieve your data files.



The **Import and Export** functions allow you to move files in and out of the system.



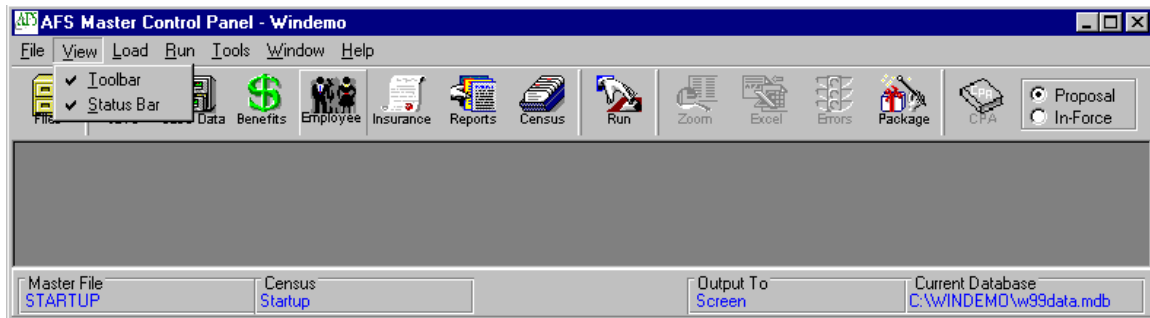
The **Output Selection** option enables you to choose where to send your output, how your packages are configured, and for how many years to illustrate.



Menu Bar Detail - View

Toolbar allows you to toggle on or off the appearance of the Toolbar.

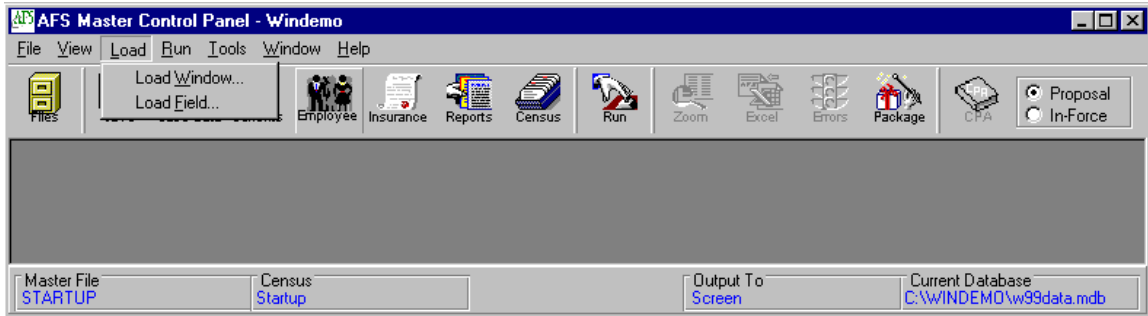
Status Bar allows you to toggle on or off the appearance of the Status Bar.



Menu Bar Detail - Load

[Load Window](#) allows you to load data from a window in another file into the current file.

[Load Field](#) allows you to load data from just one field in another file into the current file.

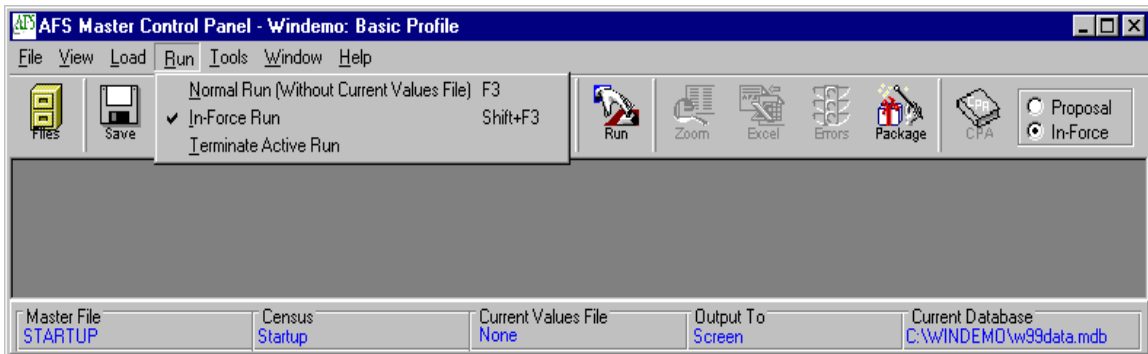


Menu Bar Detail - Run

[Normal Run](#) allows you to run a proposal illustration.

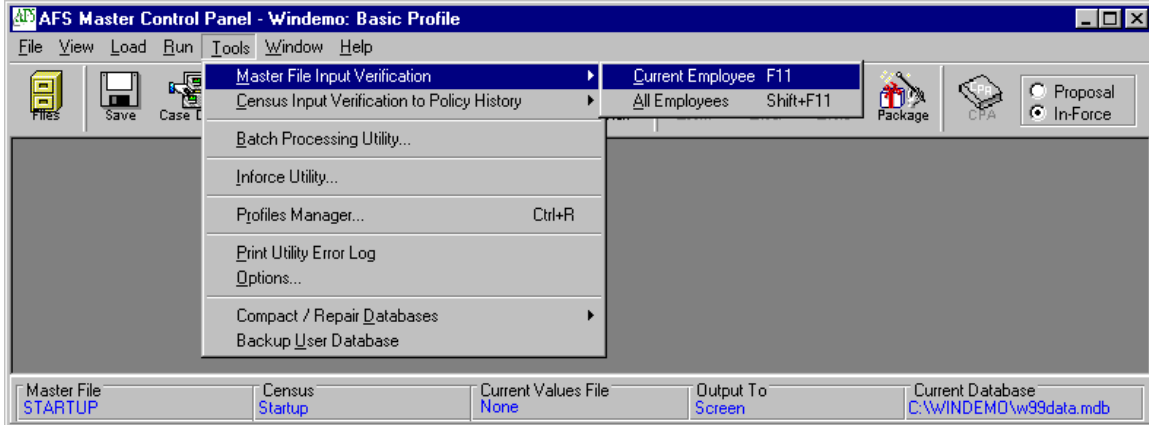
[In-force Run](#) allows you to run an in-force reprojection. This option is only available if you have selected the in-force option on the toolbar.

[Terminate Active Run](#) allows you to stop a run in the middle and return to the input screens.

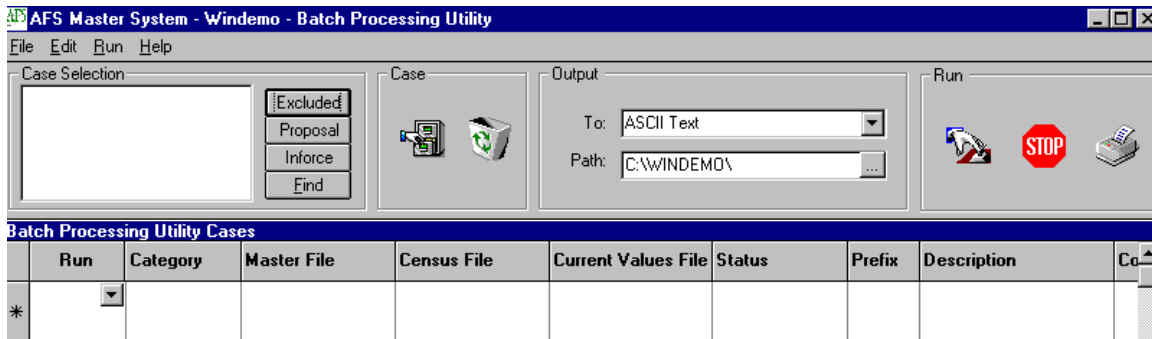


Menu Bar Detail - Tools

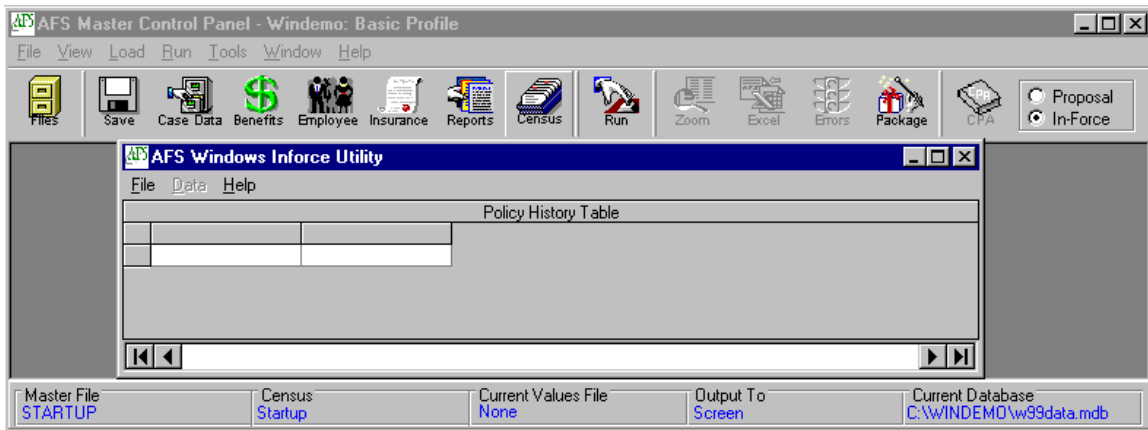
Master File Input Verification and Census Input Verification to Policy History allow you to validate your data prior to running a case.



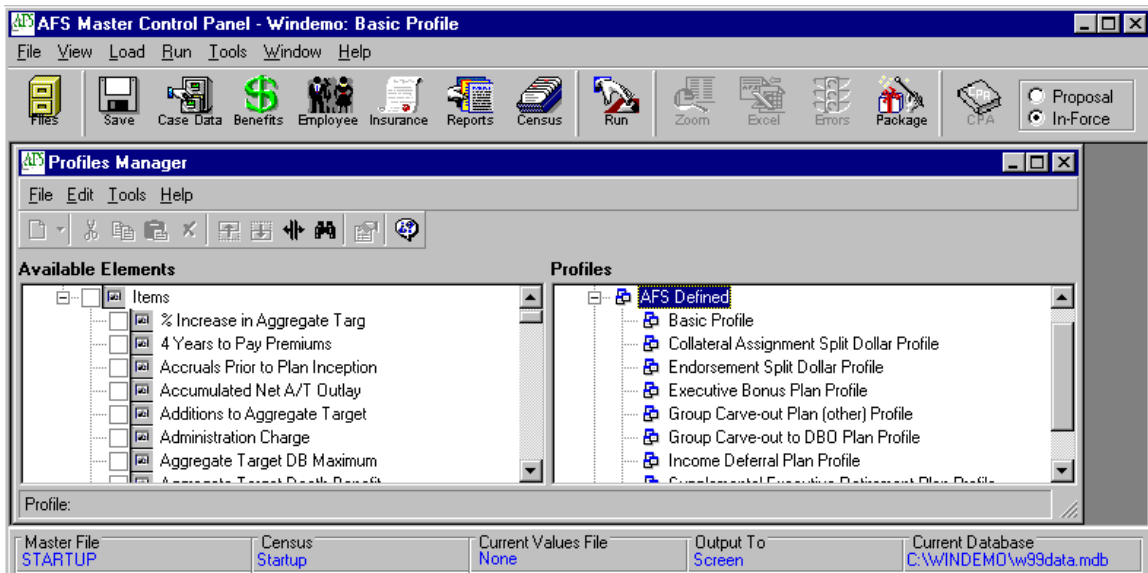
The Batch Processing Utility will run output in batches of however many files the user specifies. Most often this is used to run regression tests at the Home Office, so you can compare the results from a previous system, in an automated way, to assure their accuracy.



The **In-force Utility** gives you access to the 'Policy History Table'. The In-force Utility is used to import, export and open CVF (current values files) for in-force re-projections.



The **Profiles Manager** allows you to simplify the appearance of the input screens. The AFS defined case profiles display only those fields appropriate to the case design. User defined profiles allow you to create your own view. By selecting items from the element list, you can add, move and delete fields from your view. User may decide to modify the existing windows, or put all of the desired fields in one window.



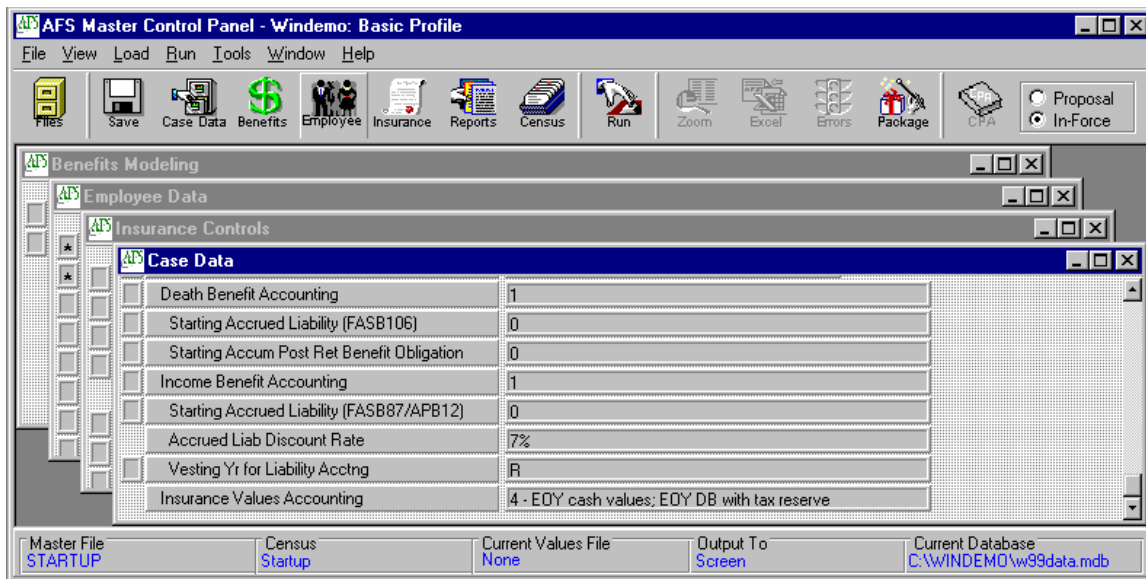
The **Options** window is where users can set their individual preferences and input agent information.



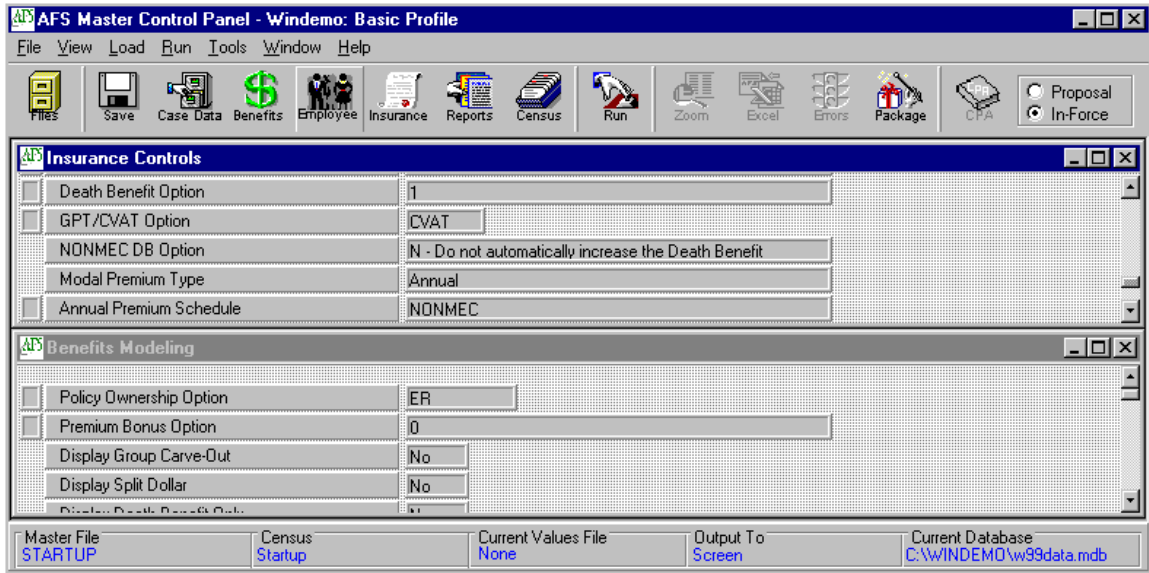
Menu Bar Detail - Window

The **Window** menu allows you to modify your screen display to three different configurations.

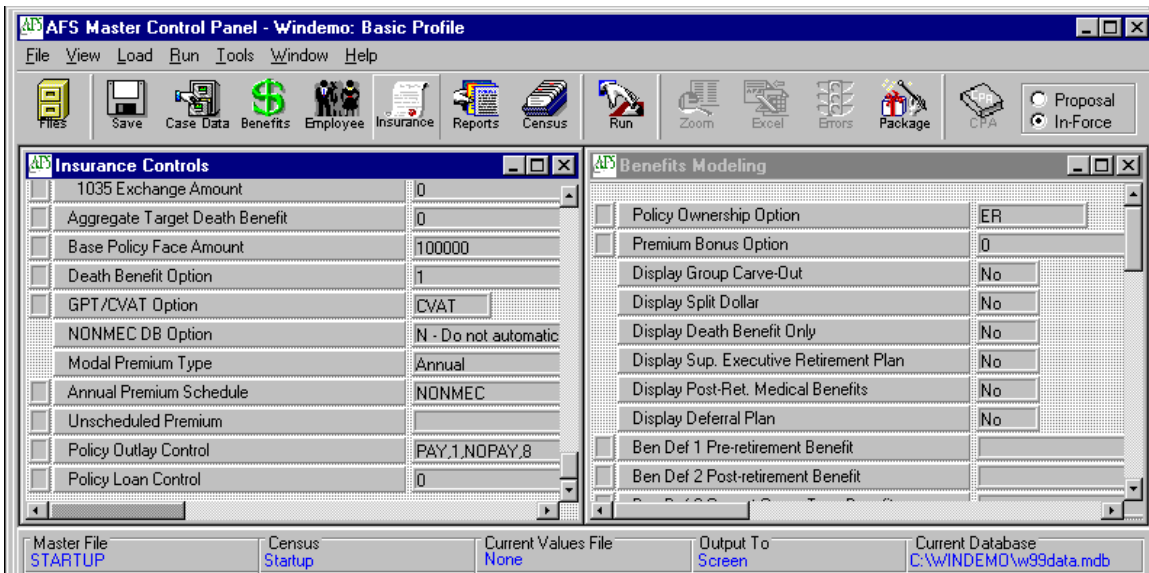
Cascade



Tile Horizontally



Tile Vertically



Toolbar Detail

The toolbar buttons offer you shortcuts to the most commonly used functions. Some buttons are always available, while others are turned on or off automatically by the system, depending upon the circumstances. From left to right, the toolbar buttons are:

The [Files Button](#) opens the File Manager, where you may open and organize the files used by the system.



The [Save Button](#) saves the Master and Census files that are open.



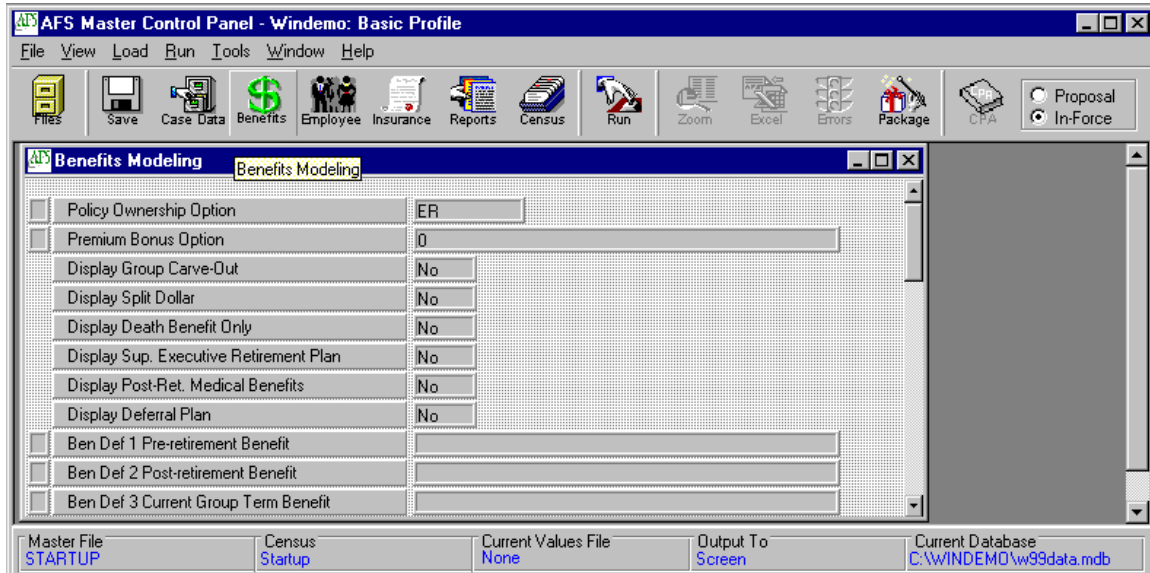
The [Case Data Button](#) opens the Case Data window where you input general, case-level information.

A screenshot of the "AFS Master Control Panel - Windemo: Basic Profile" application window. The "Case Data" window is open, showing a form with the following fields and values:

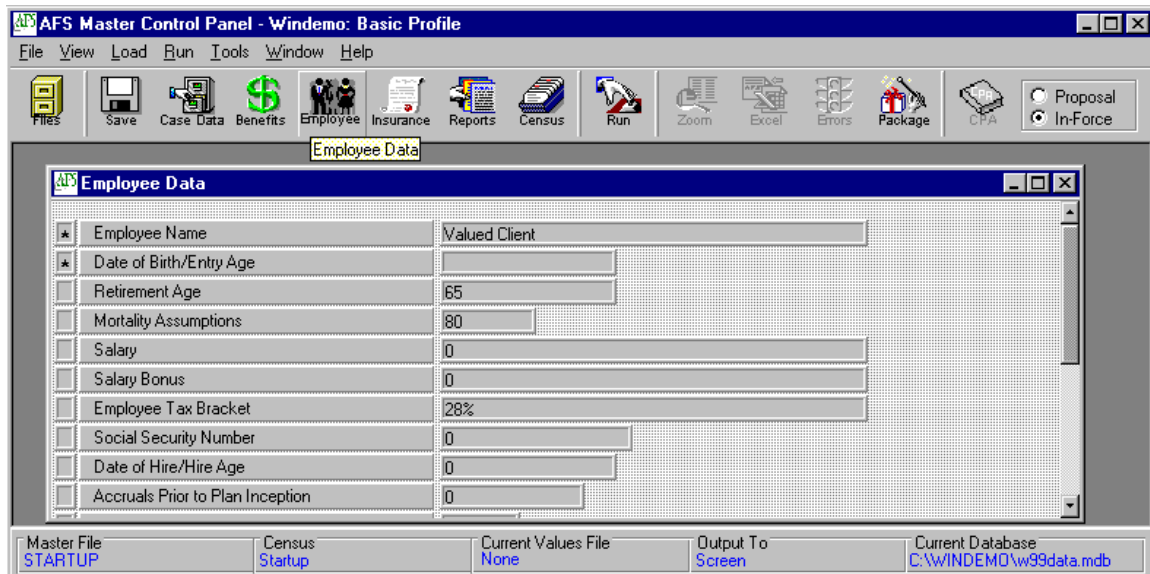
Producer Name	Mr./Ms. Producer
Plan Name	Basic Insurance Plan
Corporation Name	XYZ Corporation
Group Case #	
Plan Initiation Date	02/01/2001
Fiscal Year-end Date	
<input type="checkbox"/> Corporate Tax Bracket	40%
Display Plan Assumptions	Yes
<input type="checkbox"/> A/T Cost of Money Rate	0%
A/T Pres Val Discount Rate	0%
General Inflation Rate	4%

At the bottom of the window, there are status fields: Master File (STARTUP), Census (Startup), Current Values File (None), Output To (Screen), and Current Database (C:\WINDEMO\w99data.mdb).

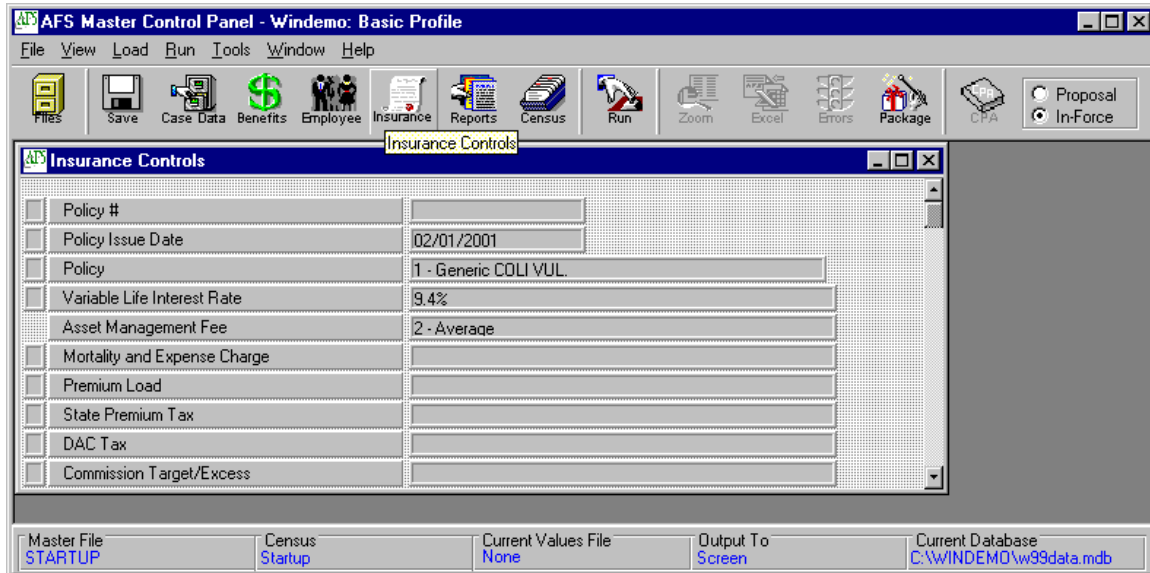
The **Benefits Button** opens the Benefits Definition window, where you specify the nature of the employee benefit being provided.



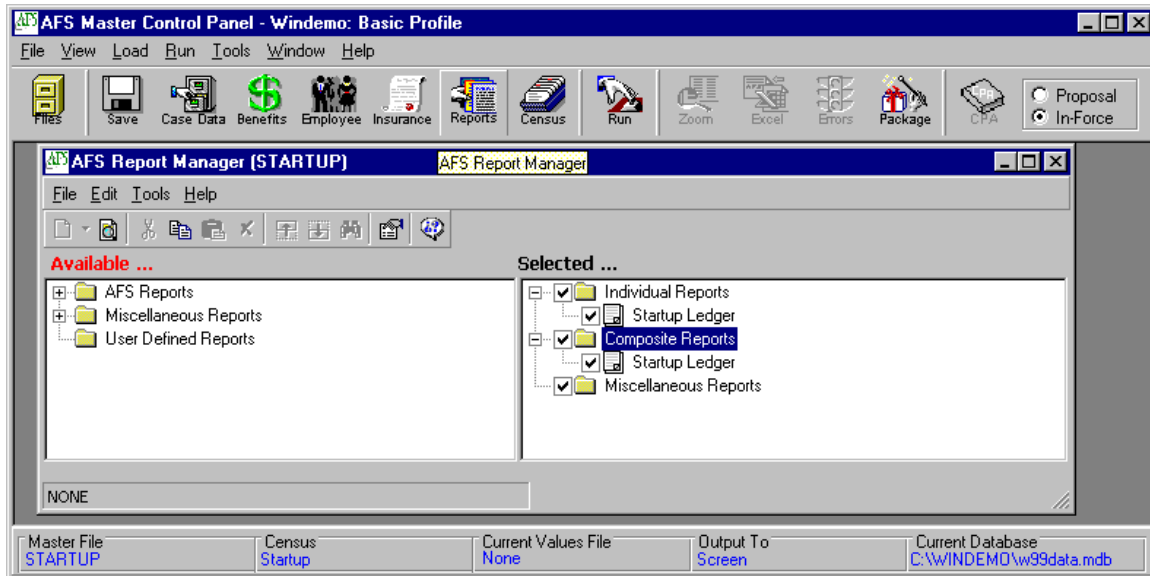
The **Employee Button** opens the Employee Data window, where you enter data for the employee being illustrated (if no census file is being used) or where you indicate default employee values (if a census file is being used).



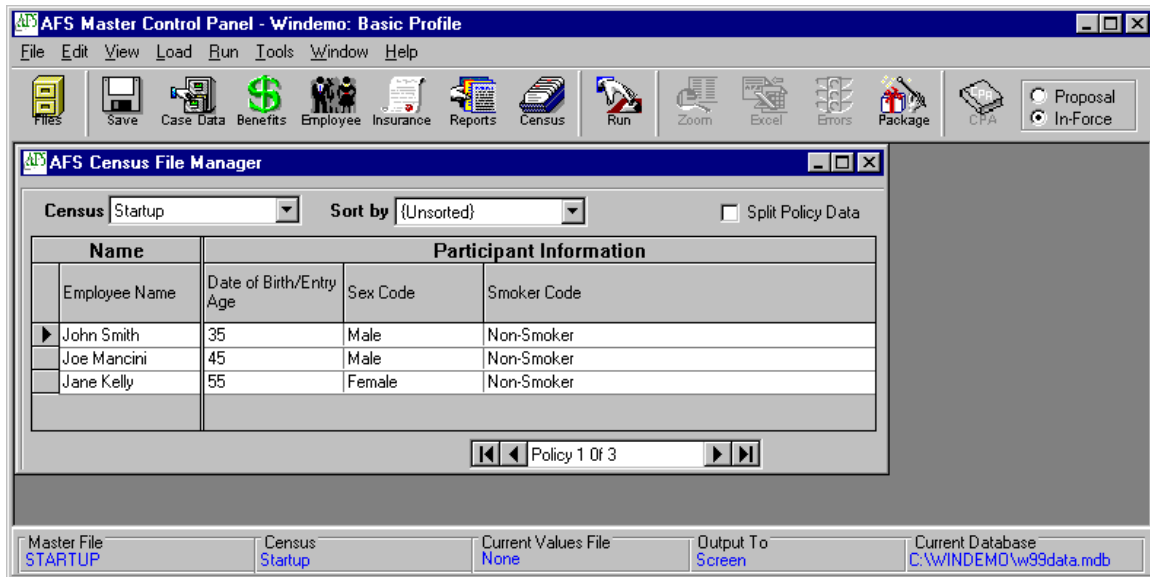
The **Insurance Button** opens the Insurance Controls window, where you choose the insurance product, riders, ownership, and other policy options.



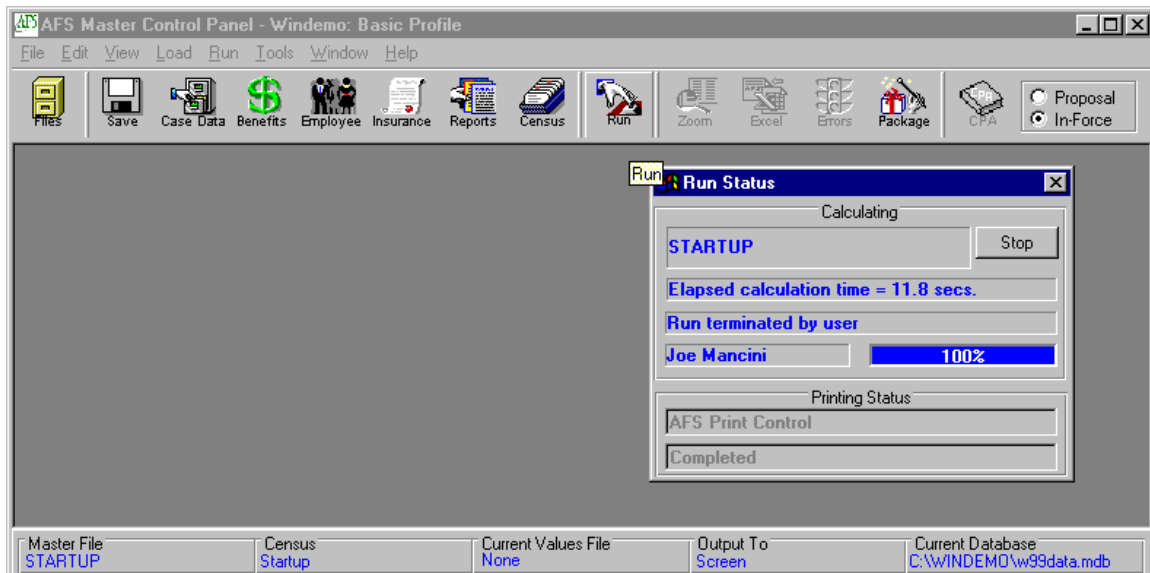
The **Reports Button** opens the Report Manager, where you can select which reports you want to produce. The report design options are also available to you from the Report Manager.



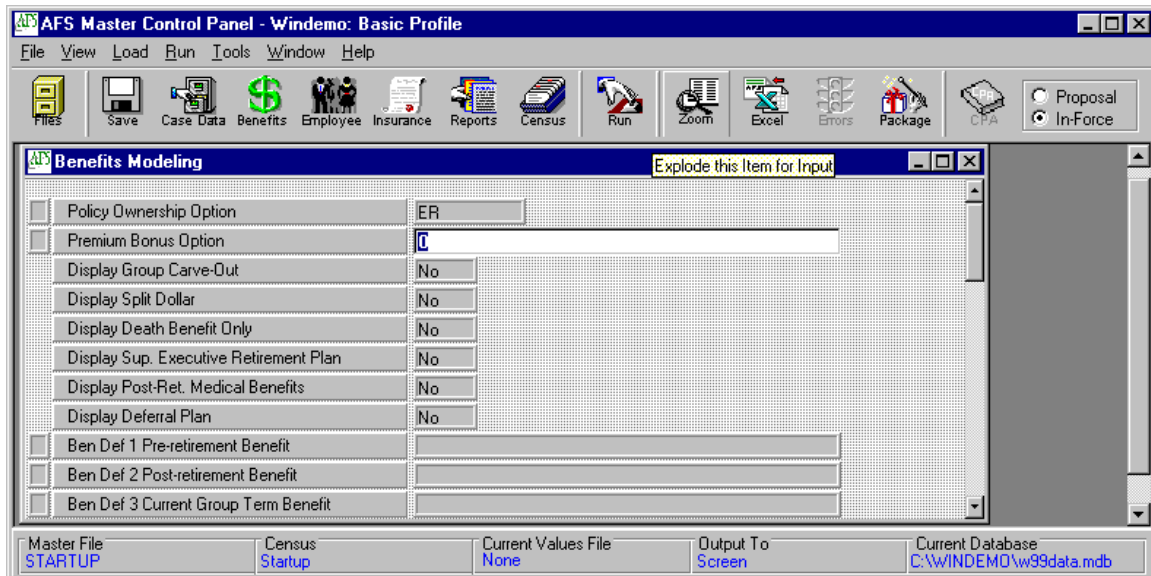
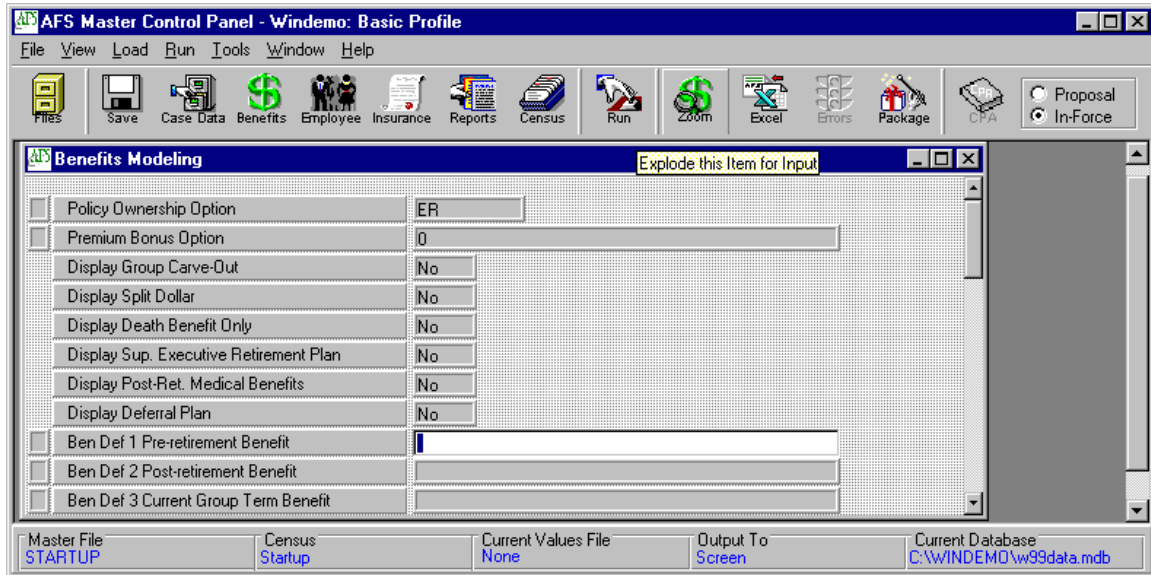
The **Census Button** opens the Census File Manager if it is not already open. This button is disabled if you do not have any asterisked fields in your master file i.e., on the Case Data, Benefits Definition, Employee Data, Insurance Controls.



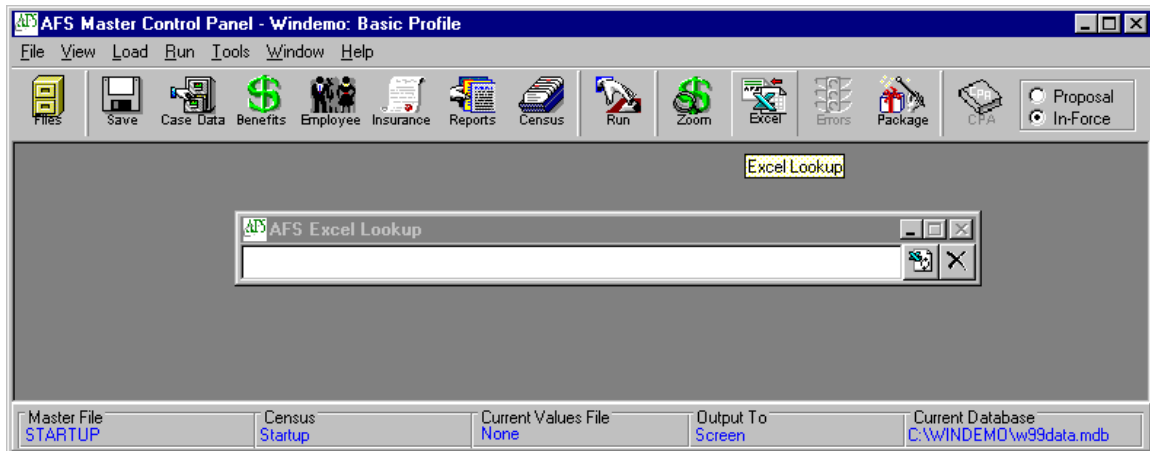
The **Run Button**, runs the current case, in proposal or in-force mode depending on the run option selected at the right end of the toolbar (see Run Options, below).



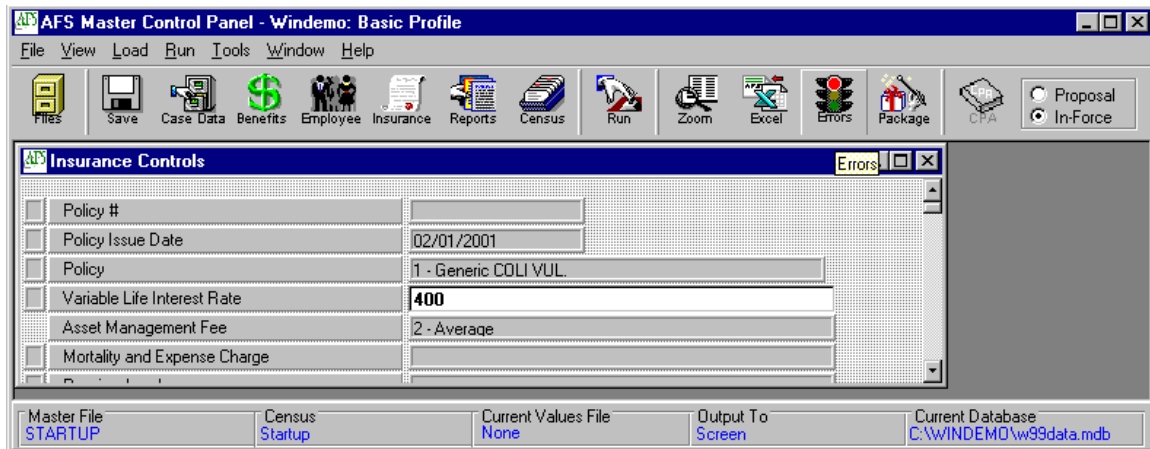
The **Zoom Button** either enables you to open the Benefits Zoom window from the Benefit Definition fields or enables you to open the Series Zoom window when working on standard series input fields.



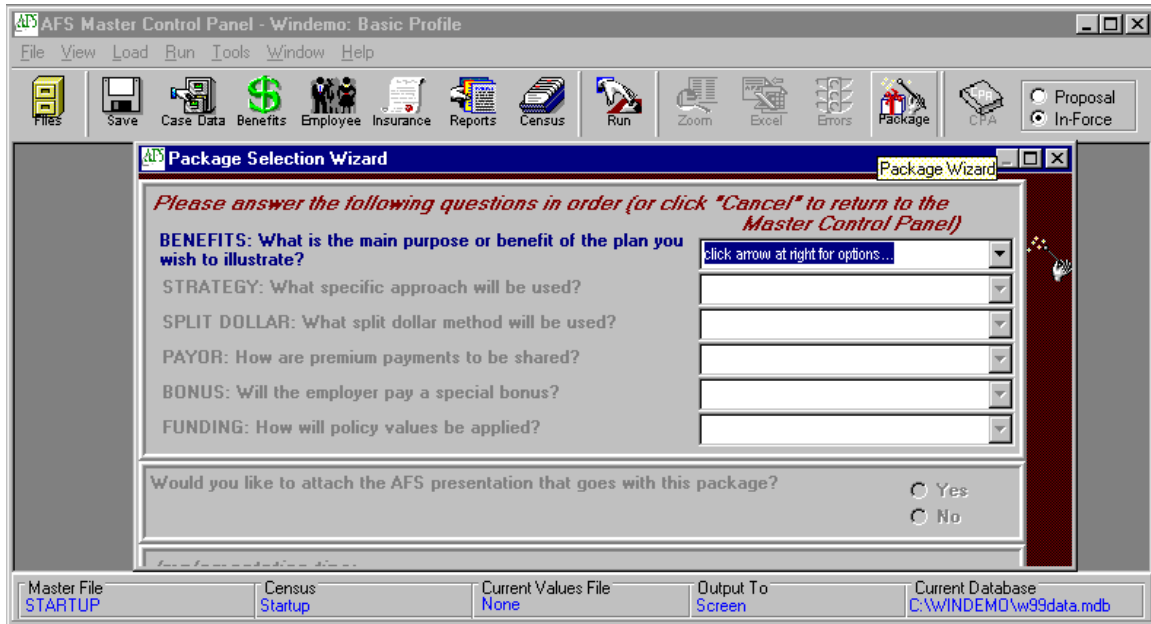
The **Excel Button** enables you to dynamically link the entries for certain input fields to values stored in a Microsoft Excel worksheet.



The **Errors Button** flashes when the system has detected one or more errors in your input. Click on it to open the Errors window. When a new master file is loaded, an error check takes place and, if no errors are found, the Errors button flashes green light and then disables itself.



The [Package Wizard Button](#) takes you to the Package Definition Wizard. This Wizard asks a few basic questions to help you set up a basic master file for different benefit concepts. In most cases, it will also offer you a presentation package including text, graphics, and standard reports.



The [CPA Button](#) links you to the AFS Corporate Plans Administrator™, if you have also licensed this system (otherwise this button is disabled).



The **Run Option Buttons** allow you to specify Proposal (i.e., new business) or In-Force mode for running your case. New cases should produce the same result in either mode. True in-force illustrations require a Current Values File to be provided by the insurance carrier with current policy values.

