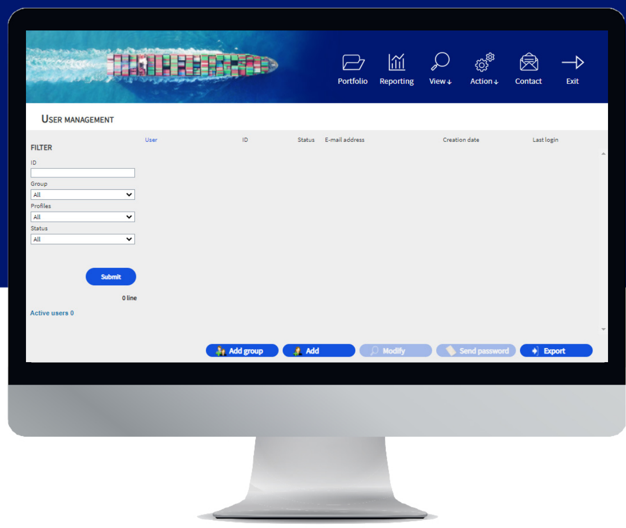
AIG QUICK REFERENCE GUIDE

TradEnable Portal
User Management



Overview

Portal users can be created by AIG staff or via the Portal itself (by an existing, registered Portal user.

There are two types of user:

BROKER

- Access and manage Client Policies
- View Broker activity history
- Administer Policy Holder Users
- Administer Broker Users

POLICY HOLDER

- Access and manage your policies
- Administer Policy Holder Users

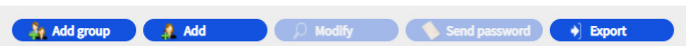
NOTE: All Broker users can create new Broker and Policy Holder users and send a new, temporary password to another user. All Policy Holder users can create new Policy Holder users and send a new, temporary password to another Policy Holder user.

Broker User Management

Only Broker Users can access the **Broker User management** module to view a complete list of active users, modify user details, send a temporary password to another user, and create new users. The User Management screen also includes an interactive grid used to select a user and view all users' **Creation** and **Last login** dates.

To access the Broker user management module:

1. In the **insured portal**, click the Broker Space button in the top right corner of the Portal.
2. Hover over the **Action** icon from the top menu.
3. Click on **User management**.



User management buttons

From the **User management** module, you can preform a variety of functions using the buttons at the bottom of the page. These options include:

- **Add group (optional)**: allows better internal organisation of users. These groups can be used to apply filters. Groups are for your own organisation's administration and do not affect user functionality. When you export a user list, the group you have selected for each users will be displayed in a Group column.
- **Add**: creates a new user
- **Modify**: allows changes to be made to user selected from the list.
- **Send password**: sends a notification to the selected user containing a new temporary password.
- **Export**: allows you to export the user list.

Create a New Broker User

To create a new user:

1. Access the **Broker User management** module.
2. Click the **Add** button.
3. Complete all required fields, including:
   - **User ID**
   - **Last Name**
   - **Date Format**
   - **Title**
   - **Active**
   - **Email address**
   - **First Name**
   - **Language**
4. Complete any additional fields, if applicable.
5. Select the appropriate user profile(s) from the Profiles section on the left boxright.
6. Click the **Add** button to add these profiles to the user's profile
7. Select the required **Policies** for the user from the left box.
8. Click the **Add** button to add these **policies** to the user's profile

NOTE: If you select nothing from the **Policies** list, by default the user will have access to **all** policies.

9. Click the **Submit** button.

Modify a User

To modify a user:

1. Access the **Broker User management** module:
2. Select the user profile from the list.
3. Click the **Modify** button.
4. Make changes as appropriate
5. Click the **Submit** button.

You can adjust any of the features detailed in the previous section, as well as adjust some additional options.

These options include:

- **Active** checkbox: if the box is checked, the users profile is active. Removing the checkmark will deactivate the user's account and prevent them from accessing the portal
- **Closed** checkbox: marking this active will completely block the users access to the portal.

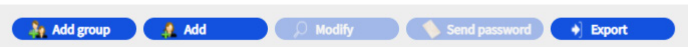
NOTE: If the user is **Closed**, they cannot connect to the portal or receive **password** link via the **Send Password** button.

Policy Holder User Management

Both Broker and Policy Holder users can access the **Policy Holder User management module** to view a complete list of active users, modify user details, send a temporary password to another user, and create new users. The User Management screen also includes an interactive grid used to select a user and view all users' **Creation** and **Last login** dates.

To access the Policy Holder user management module:

1. Ensure you are in the **Insured portal.**
2. Hover over the **Action** icon from the top menu.
3. Click on **User management**.



User management buttons

From the **Policy Holder User management** module, you can perform a variety of functions using the buttons at the bottom of the page. These options include:

- **Add group (optional)**: allows better internal organisation of users. These groups can be used to apply filters. Groups are for your own organisation's administration and do not affect user functionality. When you export a user list, the group you have selected for each user's will be displayed in a Group column.
- **Add**: creates a new user
- **Modify**: allows changes to be made to user selected from the list.
- **Send password**: sends a notification to the selected user containing a new temporary password.
- **Export**: allows you to export the user list.

Create New User

To create a new user:

1. Access the **Policy Holder User management** module.
2. Click the **Add** button.
3. Complete all required fields, including:
   - **User ID**
   - **Title**
   - **First Name**
   - **Last Name**
   - **Active**
   - **Language**
   - **Date Format**
   - **Email address**
4. Complete any additional fields, if applicable.
5. Select the appropriate user profile(s) from the Profiles section on the left box.
6. Click the **Add** button to add these **profiles** to the user's profile
7. Select the required **Policies** for the user from the left box.

NOTE: If you select nothing from the **Policies** list, by default the user will have access to **all** policies.

8. Click the **Add** button to add these **policies** to the user's profile
9. Click the **Submit** button.

Modify a User

To modify a user:

1. Access the **Policy Holder User management** module:
2. Select the user profile from the list.
3. Click the **Modify** button.
4. Make changes as appropriate
5. Click the **Submit** button.

All existing users can adjust any of the features detailed in the previous section, as well as adjust some additional options. These options include:

- **Active** checkbox: if the box is checked, the user's profile is active. Removing the checkmark will deactivate the user's account and prevent them from accessing the portal
- **Closed** checkbox: marking this active will completely block the user's access to the portal.

NOTE: If the user is **Closed**, they cannot connect to the portal or receive **password** link via the **Send Password** button.

AIG

DACH_202112