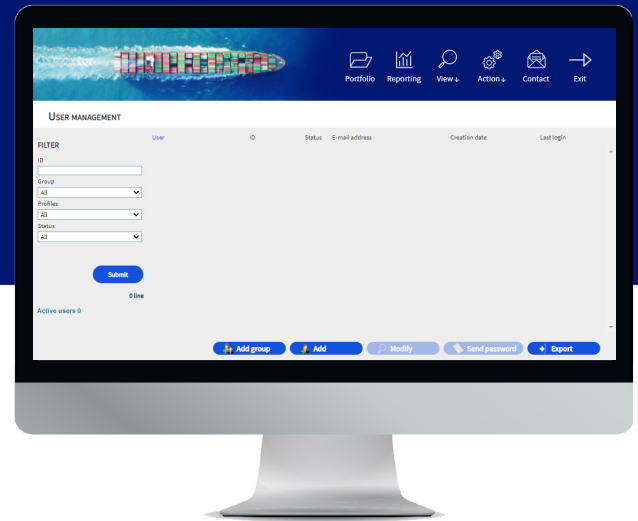


## AIG QUICK REFERENCE GUIDE

# 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

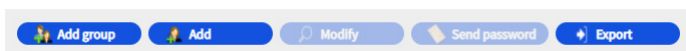
**NOTE:** All Broker users can create new Broker and Policy Holder users and send a new, temporary password to another user. All Policy Holder users can create new Policy Holder users and send a new, temporary password to another Policy Holder user.

## 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.

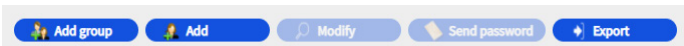
**NOTE:** If the user is **Closed**, they cannot connect to the portal or receive **password** link via the **Send Password** button.

## 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:

- |                      |                        |                     |
|----------------------|------------------------|---------------------|
| • <b>User ID</b>     | • <b>Title</b>         | • <b>First Name</b> |
| • <b>Last Name</b>   | • <b>Active</b>        | • <b>Language</b>   |
| • <b>Date Format</b> | • <b>Email address</b> |                     |

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.

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