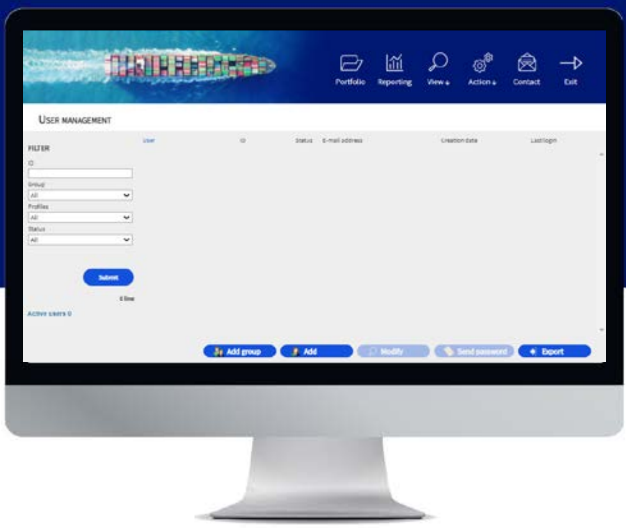
This information is intended for insurance brokers and other insurance professionals.

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.

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