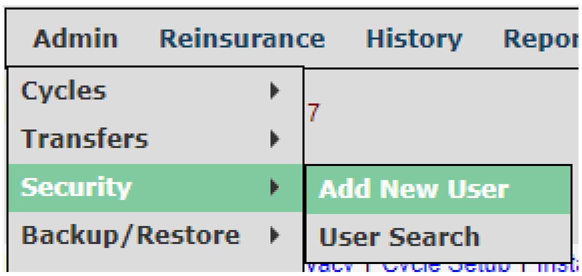
## Adding Users

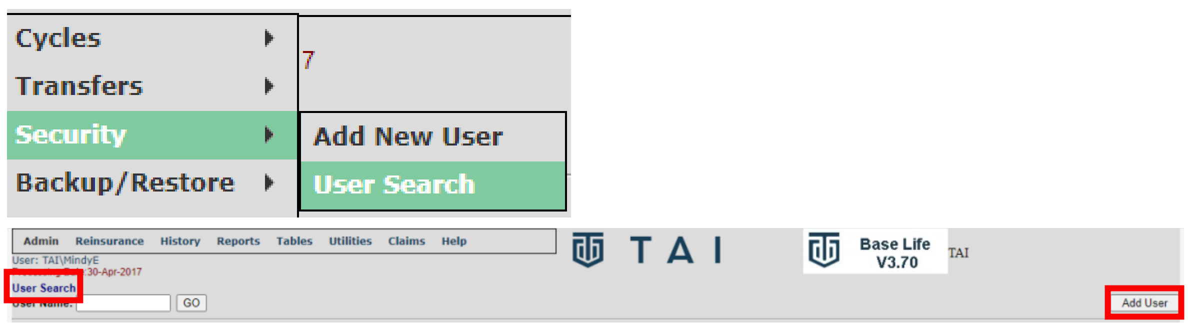
*This type of request is performed by a user with Administration rights.*

*Note: User passwords are not assigned. On their first login they enter their User ID in both the User ID and Password fields and are then prompted to set their password.*

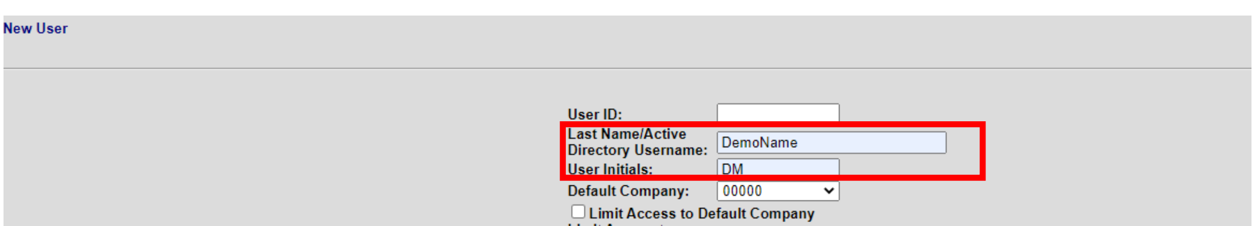
1. Select **Admin > Security > Add New User** or, from the User Search screen, click **Add User**.




Or

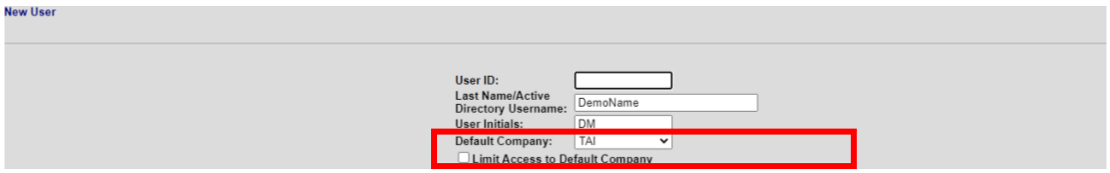



2. Enter a unique **User ID** (maximum 8 characters), **Last Name** or **Active Directory Username**, and **User Initials**.

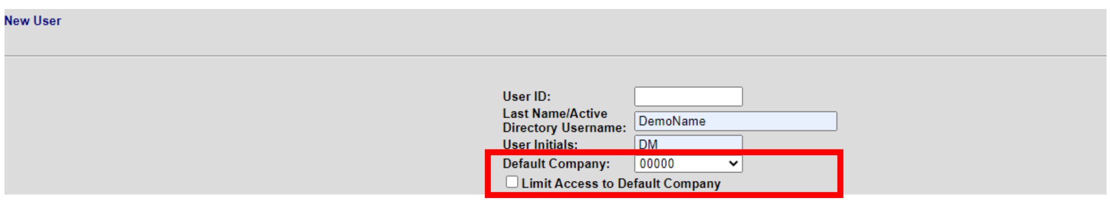


*Note: The User ID or initials are shown in the* ***Create Source*** *field of records created by the user.*

3. Select the **Default Company** for this user.
    a. To limit their access to just the company-keyed information (such as Policy, Cession, Billing, Exhibit, etc.) for that company, check **Limit Access to Default Company**. (This constrains the user's access to company-keyed information, such as Policy, Cession, Billing, Exhibit, etc., for any company other than the default one).




    b. If there are multiple processing companies, the company the user will most often been entering data should be the default. The "shared company" field will usually be entered as 00000.




4. To set the default company for the user, enter the 5-character processing company code in the **Shared Company** field (usually, this is 00000). If there are multiple processing companies at an installation, this should be the company most commonly maintained online.

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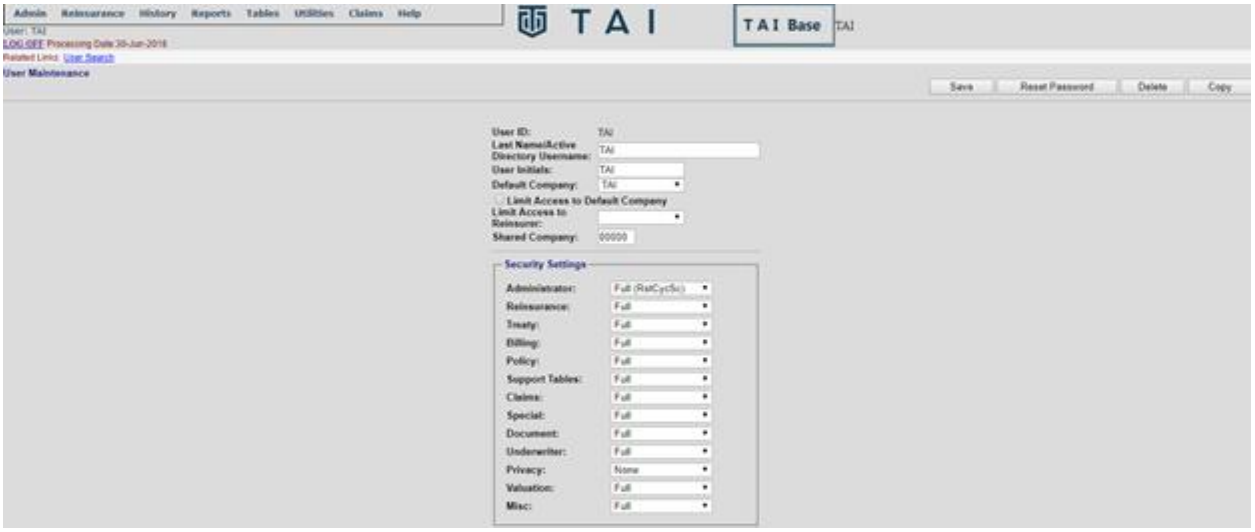
5. Select **Security Settings**

   Each TAI system user is assigned, through their Security Settings, a level of access to each of the available groups of functions. The settings are put together in security groups which link together pages of the TAI .NET System.  Refer to the table below after the screen shot.




These settings are used in conjunction with the drop-down security permissions listed after the table below.

| **Security Setting** | **Functions (for online screens) Users with that Security Setting Can Access** |
|---|---|
| Administrator | Cycles, Transfers, Security Restore, Backup, System Dates |
| Reinsurance | Reinsurance Record, Retention Inquiry, Reports, download. |
| Treaty | Automatic Reinsurance, Treaty, Retention, Allowance, Rates, Treaty Name, Treaty Search, Treaty Quick Search, Continuation Rules, Pointer Search |
| Billing | Billing History, Billing Inquiry, Policy Exhibit History, Policy Exhibit Maintenance, Accounting Summary (and, from there, Account Detail), Policy Messages |
| Policy | Client, Candidate Search, Plan Definition, Policy Coverages, Policy Master (including Client and Policy Values ) |
| Support Tables | Reinsuring Company, Account Numbers, Smoker Class, Interest Rates, Pool Percentages, Cause of Death, Currency Code, Nicknames, Occupation Codes, Place of Death, Processing Company |
| Claims | Claim Summary, Claim Detail, Claim Payment, Claim Transaction. |

| | |
|---|---|
| Special | AdHoc Query, Upload, Claims Write-Off, AdHoc Update |
| Document | for any screen the user can view online documentation. Help pop-ups will be displayed. (see "Help Pop-ups") |
| Underwriter | Facultative Processing |
| Privacy | for any screen the user can view, if set to **Yes**, masks all insured names |
| Valuation | Valuation |
| Misc. | reserved for future use |

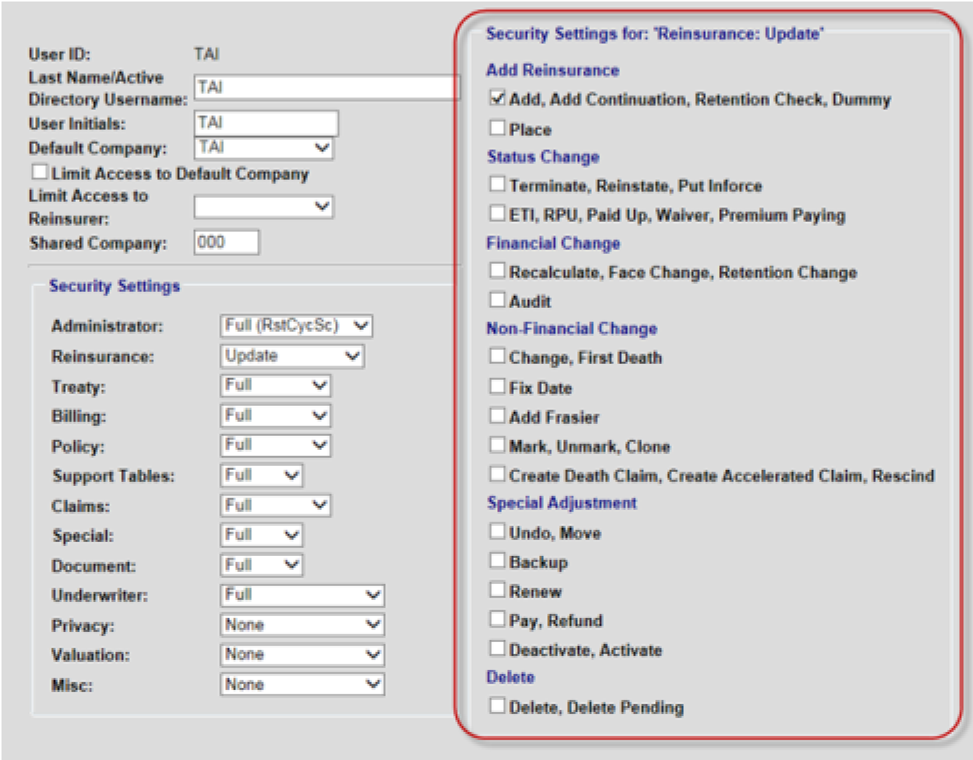
Next to each security group field there is a drop-down box which contains the Security Level options. A unique level can be defined for each group. Whereas security group defines the various online screens, the security level defines the availability to maintain TAI records online for each group of screens.

For most functional groups, excluding Administrator or Privacy, a user can be given one of the following permissions:

| | |
|---|---|
| None | User cannot access the function and, if they attempt to do so, a message is displayed "Users current security settings do not allow for user to access the requested page." |
| Inquiry | User can view the function's screen but cannot work with its contents. |
| Notes Only | User can view the function's screen, but can only add, edit, or delete notes on that screen. This is not available for the Support Tables, Special, Document, or Underwriter function. |
| Update | User can view and edit the function's existing records. |
| Full | User can view, edit, add, and delete the function's records. |

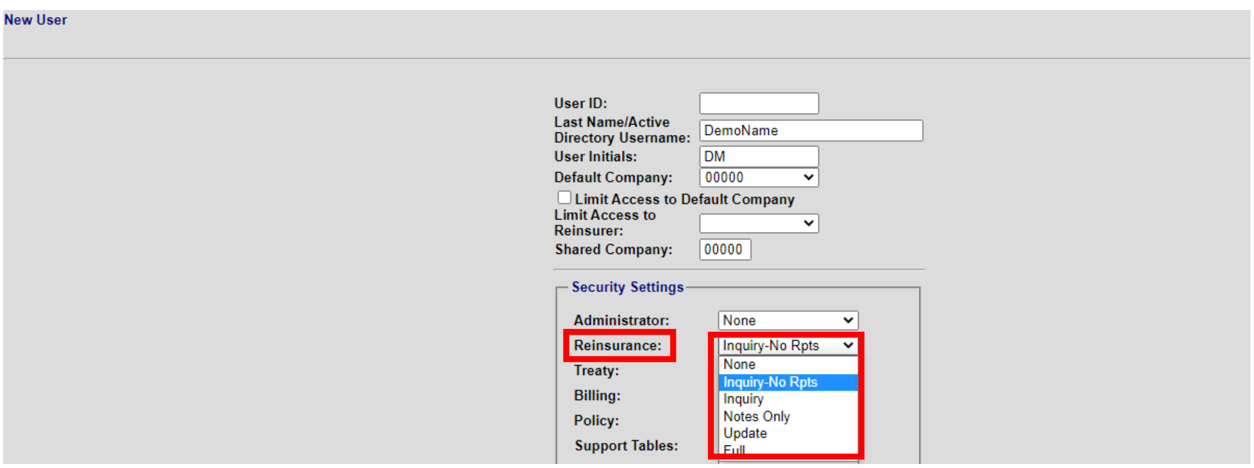
6. When the **Update** level is chosen for Reinsurance, a user sees the following screen, which offers additional flexibility in designating which reinsurance functions are available to a given user.

*Note: Checking all the boxes in the secondary screen is the same as setting the Reinsurance security setting for the user to "Full".*




Update Options for Reinsurance Security

7. For Reinsurance, an **Inquiry - No Rpts** permission is available. This allows users to view a function's screen but not do any system-generated reporting.

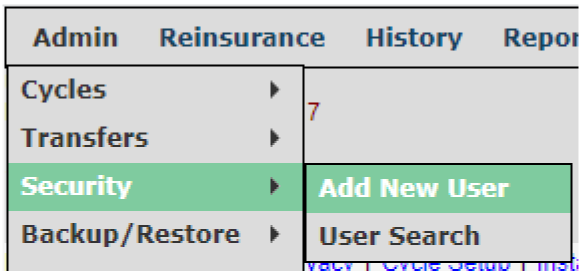



8. On completion of the User set up, click Save

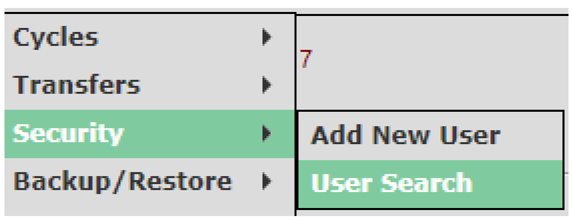
## Adding Reinsurers

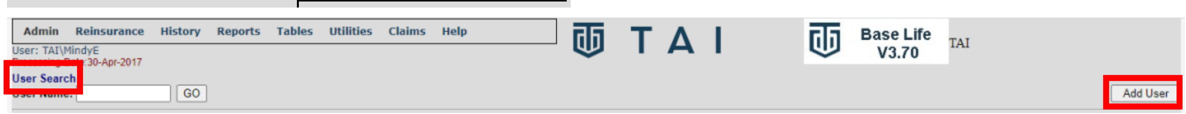
This is commonly used when a reinsurer is on site for auditing purposes and the reinsurer should only have access to its specific data.

1. Select **Admin > Security > Add New User** or, from the User Search screen, click **Add User**.

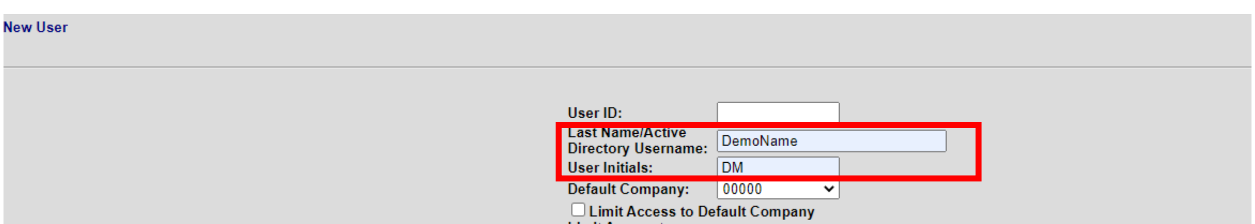



Or




2. Enter a unique **User ID** (maximum 8 characters), **Last Name** or **Active Directory Username**, and **User Initials**.




*Note: The User ID or initials are shown in the* ***Create Source*** *field of records created by the user.*

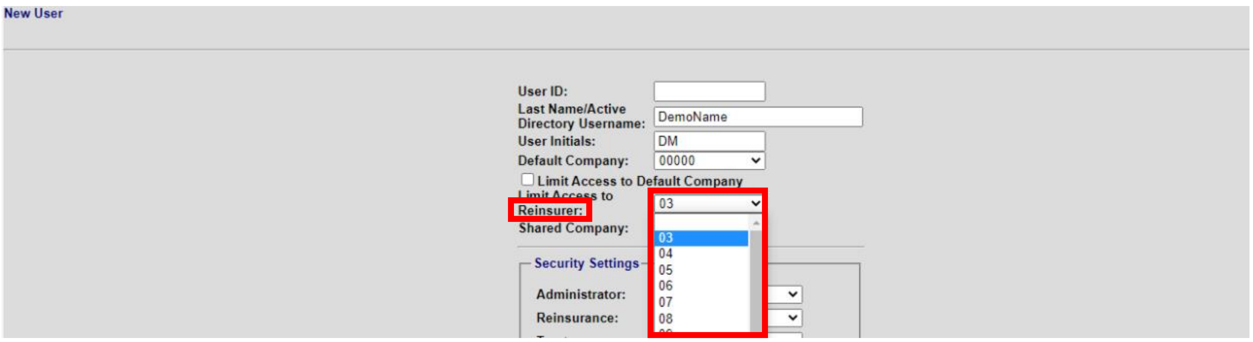
3. Select the **Default Company** for this user.

   a. To limit access to just the company-keyed information (such as Policy, Cession, Billing, Exhibit, etc.) for that company, check **Limit Access to Default**

**Company**. (This constrains the user's access to company-keyed information, such as Policy, Cession, Billing, Exhibit, etc., for any company other than the default one).

b. If there are multiple processing companies, the company the user will most often been entering data should be the default. The "shared company" field will usually be entered as 00000.

3. From the **Limit Access to Reinsurer** list select a company code. This user can access only those records associated with that reinsuring company's business, on the Cession, Billing, Exhibit, and Treaty screens.




4. To set the default company for the user, enter the 5-character processing company code in the **Shared Company** field (usually, this is 00000). If there are multiple processing companies at an installation, this should be the company most commonly maintained online.
5. For Reinsurance, an **Inquiry - No Rpts** permission is available. This allows users to view a function's screen but not do any system-generated reporting.
6. On completion of the User set up, click Save

**Remote Access:** If you need to provide remote access for your reinsurer, this is typically provided via a client's VPN solution. We recommend contacting your IT department to set this up.