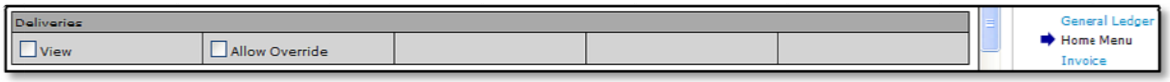
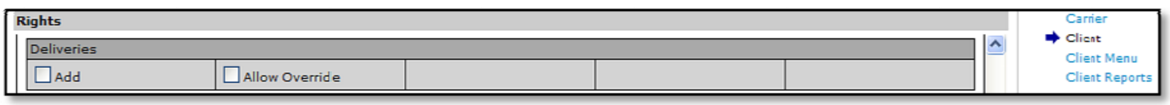
Security

- Added security to the **HOME** > **DELIVERY** screen including ability to restrict view to deliveries created by other users. On rollout of v1.93, access is not granted.



  - To allow a user to see the **HOME > DELIVERY** screen, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Home menu > Deliveries** rights. Select the **View** check box. Save the changes and synchronize users on the **user assigned** tab.
  - To allow a user to view anyone's deliveries on the **HOME > DELIVERY** screen select the **Allow Override** check box. Make sure to save the changes and synchronize users on the **user assigned** tab.

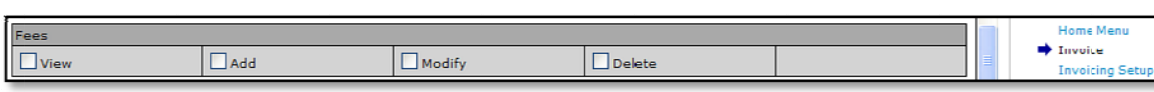
- Added security for adding deliveries and the ability to restrict viewing of deliveries created by other users. On v1.93 rollout, access is not granted.



  - To allow a staff member to add deliveries at the **Client menu >DELIVERY** level, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Client > Deliveries** rights. Select the **Deliveries** check box. Save the changes and synchronize users on the **user assigned** tab.
  - To allow a staff member to view anyone's deliveries on the **Client menu > DELIVERY** screen, select the **Allow Override** check box. Make sure to save the changes and synchronize users on the **user assigned** tab.

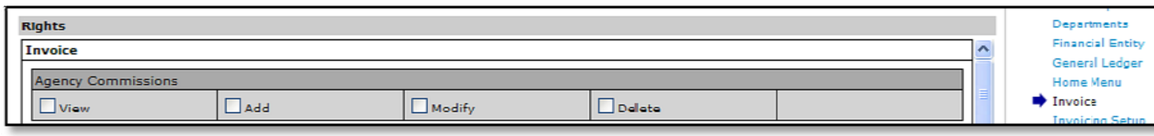
- Security added to the invoice screen. On v1.93 rollout, access is not granted.
  - In order to secure invoice fees, other commissions, premium and taxes V**iew**, **Add**, **Modify** and **Delete** security levels have been added. To allow staff members access to these areas when adding invoices at client, policy invoicing or carrier reconciliation invoicing, security will need to be added to their security rights templates. Use the information below to determine what security will be needed. If the same security is needed that the user has in v1.92.5, grant access to all sections of the addition.

- Security for Fees. On v1.93 rollout access is not granted.



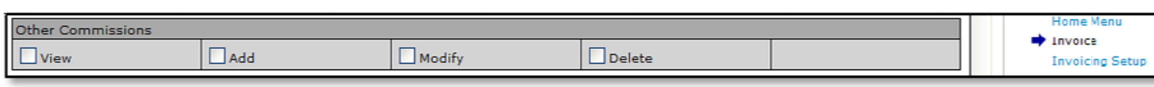
- **View**, **Add**, **Modify**, and **Delete** rights are added to secure the fees when invoicing. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Invoice > Fees** rights. Select the **View**, **Add**, **Modify** and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.
    - Selecting only **View** rights will only allow the fee to be viewed.
    - Selecting **Add** rights will activate the **[Add New Fee]** link allowing the addition of a fee.
    - Selecting **Modify** will activate the **Details** icon allowing the fees to be changed.
    - Selecting **Delete** will activate the **Remove** icon allowing the fees to be deleted.

- Security rights of **Commissions** in v1.92.5 are changed to **Agency Commissions**.



- On v1.93 rollout, rights to commissions will provide access if granted to agency commissions only. In v1.92.5 and prior versions of Nexsure this right controlled all invoice commissions. Now this security will be separated to secure both agency commissions and other commissions.
- **View**, **Add**, **Modify**, and **Delete** grant rights for agency commissions when invoicing. To allow a user full access; navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Invoice > Agency Commissions** rights. Select the **View**, **Add**, **Modify** and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.
    - Selecting only **View** rights will only allow the agency commission to be viewed.
    - Selecting **Add** rights will activate the **[Add New Agency Commission]** link allowing the addition of an agency commission.
    - Selecting **Modify** will activate the **Details** icon allowing the agency commission to be changed.
    - Selecting **Delete** will activate the **Remove** icon allowing the agency commission to be deleted.

- Security for other commissions. On v1.93 rollout, access is not granted.

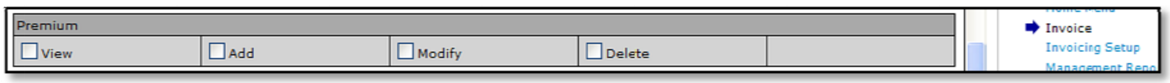


- **View**, **Add**, **Modify**, **Delete** rights are added to secure the other commissions when invoicing. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components >**

Invoice > Other Commissions rights. Select the **View**, **Add**, **Modify** and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.

- Selecting only **View** rights will only allow the other commissions to be viewed.
- Selecting **Add** rights will activate the **[Add New Other Commissions]** link allowing the addition of other commissions.
- Selecting **Modify** will activate the **Details** icon allowing the other commissions to be changed.
- Selecting **Delete** will activate the **Remove** icon allowing the other commissions to be deleted.

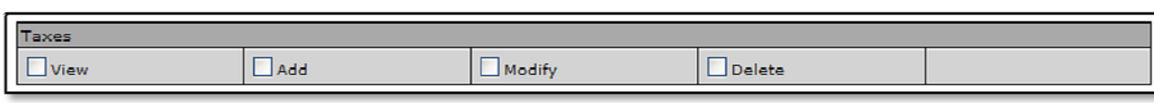
- Security for Premium. On v1.93 rollout, access is not granted.



  o **View**, **Add**, **Modify**, **Delete** rights are added to secure the premium when invoicing. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Invoice > Premium** rights. Select the **View**, **Add**, **Modify** and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.

- Selecting only **View** rights will only allow the premium to be viewed.
- Selecting **Add** rights will activate the **[Add New Premium]** link allowing the addition of a premium.
- Selecting **Modify** will activate the **Details** icon allowing the premiums to be changed.
- Selecting **Delete** will activate the **Remove** icon allowing the premiums to be deleted.

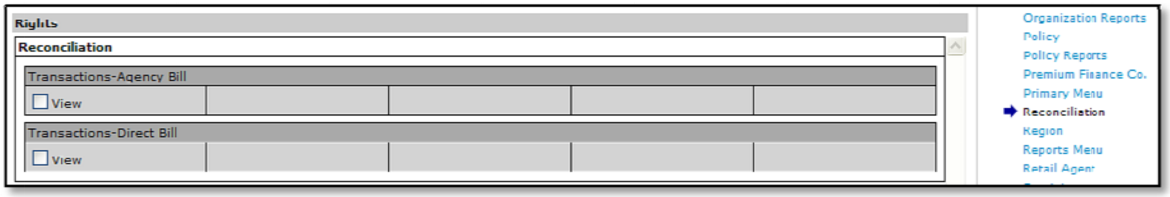
- Security for Taxes. On v1.93 rollout, access is not granted.



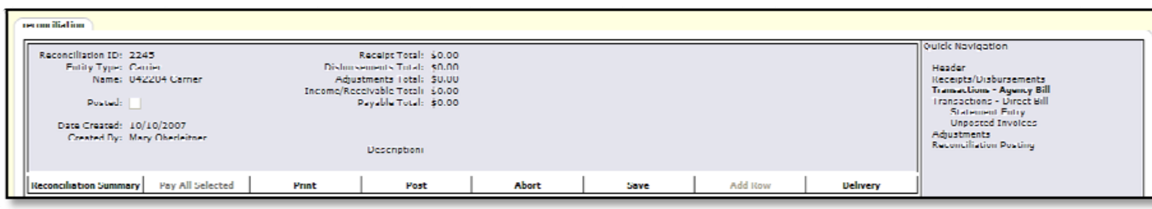
  o **View**, **Add**, **Modify**, **Delete** rights are added to secure the taxes when invoicing. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Invoice > Taxes** rights. Select the **View**, **Add**, **Modify** and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.

- Selecting only **View** rights will only allow the taxes to be viewed.
- Selecting **Add** rights will activate the **[Add New Tax]** link allowing the addition of a tax.
- Selecting **Modify** will activate the **Details** icon allowing the taxes to be changed.
- Selecting **Delete** will activate the **Remove** icon allowing the taxes to be deleted.

- Added Security to Carrier Reconciliation screen. On v1.93 rollout, access is not granted.



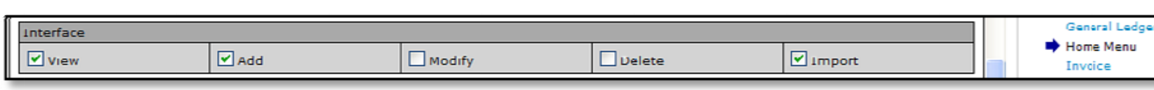
  - o **View** rights are added to secure the carrier reconciliation transactions access when processing carrier reconciliations. To allow a user full access navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Reconciliation > Transactions – Agency Bill and Transactions – Direct Bill** rights. Select the **View** check boxes. Save the changes and synchronize users on the **user assigned** tab.
    - Selecting only **View** rights will grant full rights to transactions for agency and/or direct bill reconciliation work.
      - ▪ View rights to Transactions – Agency Bill only will grant full rights to agency bill transactions only.
      - ▪ View rights to Transactions – Direct Bill only will grant full rights to Transactions – Direct Bill and the associated links for Statement Entry and Unposted Invoices only.



Note: To grant access to modify un-posted invoices for fees, taxes, agency commissions, premiums, and other commissions make sure to grant user access to the Core Component of Invoice for these areas.

- Extended policy restriction security to the client level summary of insurance tab. Restricted policy will not be displayed if user is not assigned to that policy.
  - o If a policy is restricted and the user trying to gain access to the summary of insurance is not assigned to the policy, they will not be able to view coverage information on the **summary of insurance** tab.

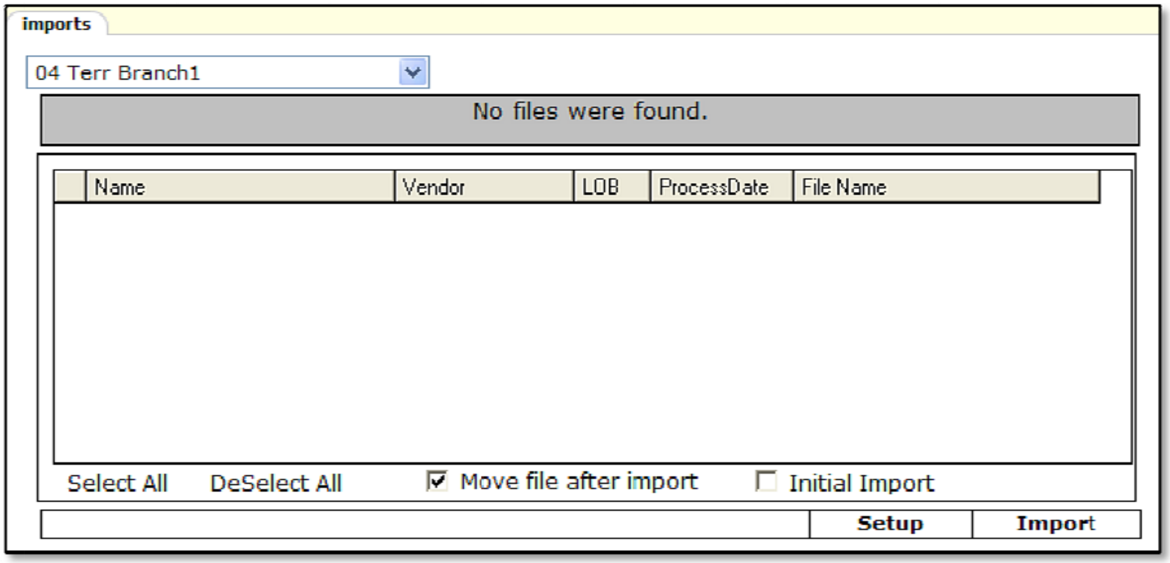
- Added Interface security for setup of imports (**Modify**). On v1.93 rollout, access is not granted.



  - o **Modify** rights is added to secure file selection choices when importing files into Nexsure through **Exchange Manager**. To allow a user to modify file and setup choices, navigate to the

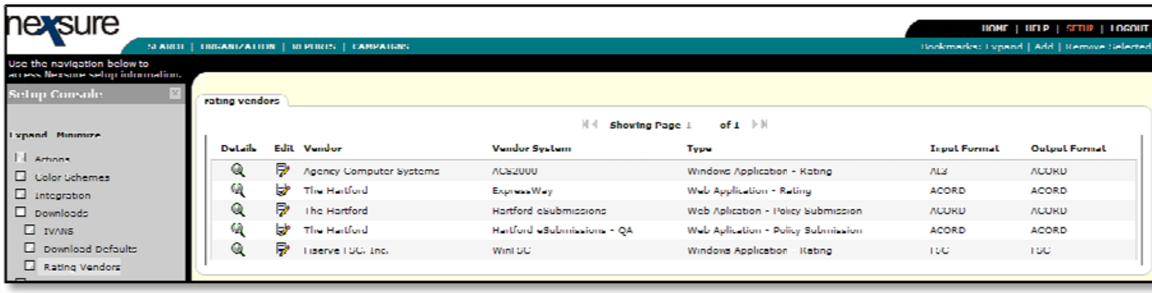
Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Home Menu > Interface rights. Select the **Modify** check box. Save the changes and synchronize users on the **user assigned** tab.

- Granting **Modify** rights to a user will allow access to **HOME > INTERFACE > Import Files** link access to the **Setup** and **Move File** after import and initial import check boxes. The **Modify** right would generally be given only to those employees who will set up the imports. Regular users who will only import would not need this security right.

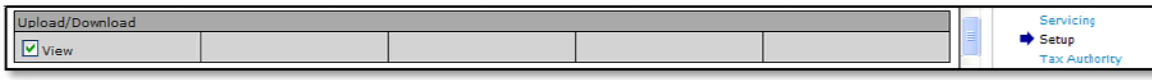


- Rating security for Rating Vendor Setup. On v1.93 rollout, access is not granted.

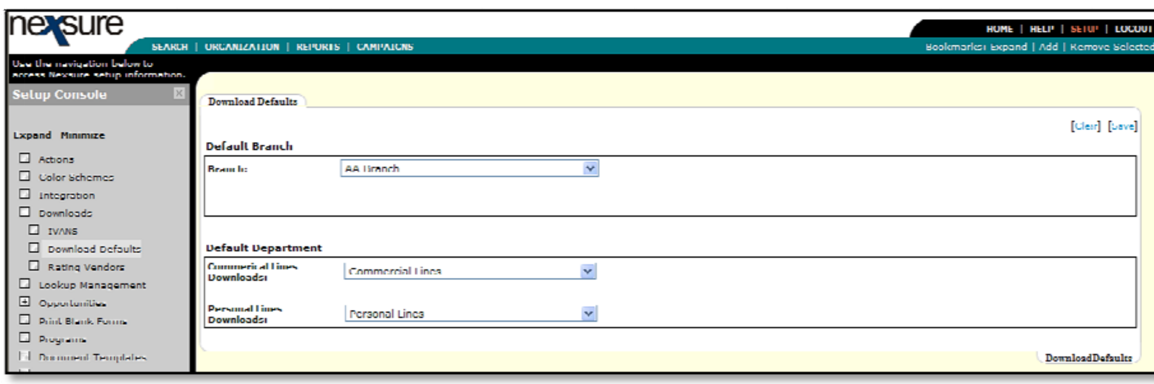
- **View** rights are added to secure setup of the rating vendors. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Setup > Rating** rights. Select the **View** check box. Save the changes and synchronize users on the **user assigned** tab.
  - Granting **View** rights to a user will allow full access to Rating Vendors found under **Utility menu > SETUP > Downloads > >Rating Vendors**. User setting up Rating Vendors will need this access but regular users would not need this security right.



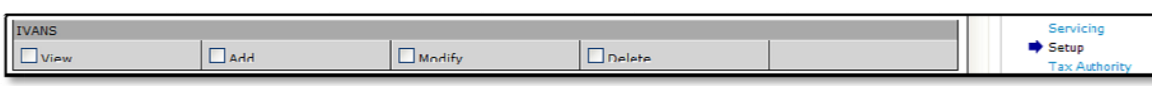
- Upload / Download. On v1.93 rollout, access is not granted.



- **View** rights are added to secure setup of download defaults. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Setup > Upload / Download** rights. Select the **View** check box. Save the changes and synchronize users on the **user assigned** tab.
    - Granting **View** rights to a user will allow full access to set up the download defaults which is found under **Utility menu > SETUP > Downloads > Download Defaults**. Users setting up download defaults will need this access but regular users would not need this security right.



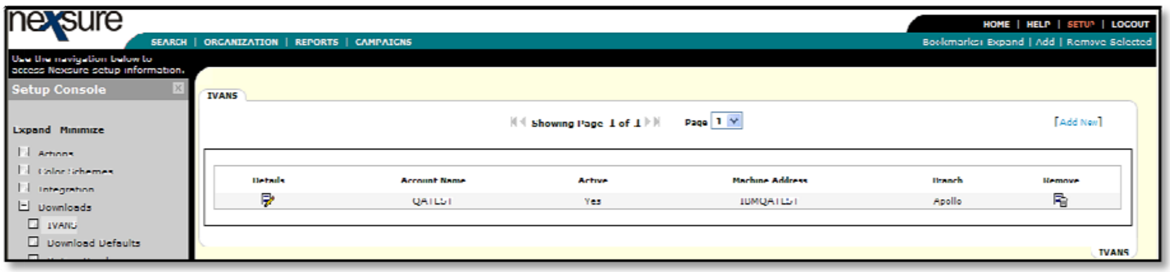
- IVANS. On v1.93 rollout, access is not granted.



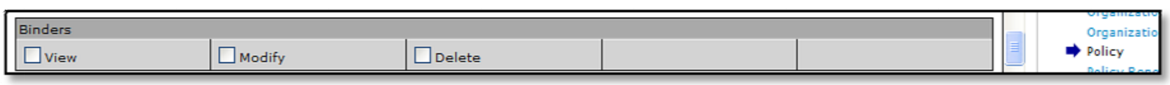
- **View**, **Add**, **Modify**, **and Delete** rights are added to secure setup of IVANS for downloads. To allow a user full access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Setup > IVANS** rights. Select the **View**, **Add**, **Modify**, and **Delete** check boxes. Save the changes and synchronize users on the **user assigned** tab.

- o Selecting only **View** rights will only allow the summary screen to be displayed.
- o Selecting **Add** rights will activate the **[Add New]** link allowing the addition of a new IVANS account.
- o Selecting **Modify** will activate the **Details** icon allowing the records to be changed.
- o Selecting **Delete** will activate the **Remove** icon allowing the records to be deleted.

- Users setting up IVANS accounts will need this access but regular users would not need this security right. IVANS setup is located by selecting the **Utility menu** > **SETUP** > **Downloads** > **IVANS**.



- Added security to binder tab.



  - o **View** rights are added to allow a user to view binders at **Client menu > Policy** level. To allow a user view access, navigate to the **Utility menu > SETUP > Security Administration > user rights template > select template > [edit] > Core Components > Policy > Binders** rights. Select the **View** check box. Save the changes and synchronize users on the **user assigned** tab.
    - To allow a user to modify un-posted or extend posted binder on the **Client menu > Policies>Binders** screen, select the **Modify** check box. Make sure to save the changes and synchronize users on the **user assigned** tab.
    - To allow a user to delete un-posted binders on the **Client menu > Policy Summary** screen, select the **Delete** check box. Make sure to save the changes and synchronize users on the **user assigned** tab.