



# 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.

View Allow Override	Deliveries	=	General Ledger
	View Allow Override		Home Menu

- 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.

F	lights		Carrier		
Ī	Deliveries			^	Client Mean
	Add	Allow Override			Client Reports

- 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 View, 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.

Fees					Home Menu
View	Add	Modify	Delete	=	Invoice Invoicing Setup

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- 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**.

F	Rights									
	Invoice									
ſ	Agangy Commissions		General Ledger							
							Invoice			
	View	Add	Modify	Delete			Invoicing Setup			

- 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.

Other Commissions								
View	Add	Modify	Delete			Invoice Invoicing Setup		

 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 >

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**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.

Premium	Invoice				
View	Add	Modify	Delete		Invoicing Setup
					Management Repo

- 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.

Taxes				
View	Add	Modify	Delete	

- 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.

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

Rights		Organization Reports		
Reconciliation			~	Policy Reports
Transactions-Agency Bill				Premium Filance Co.
View				Primary Meiu Reconciliation
Transactions-Direct Bil				Region
View				Reports Meiu Retail Agent

- 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.

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	Reconciliation ID: 2243 Pailby Type: Couries Name: U42204 Camer Posted: Data Created: 10/10/2007 Created By: Mary Charleitner	Racc Dislam seme Adjustme Income/Receiva Paya De	upt Total: \$0.00 nis Total: \$0.00 nts total: \$0.00 bit Total: \$0.00 bit Total: \$0.00 bit Total: \$0.00					Quick Roviestion Haadar Hiscoptz (Vieburssmints) Frenzischen – Variet Bill Si almum Finty Ungested Involces Algustments Recomciliation Posting
	Reconciliation Summary Pay All Selected	Print	Post	Abort	Save	Add Row	Uelivery	

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.
  - 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.

Interface					General Ledger
View	Add	Modify	Delete	✓ Import	Hore Menu Invcice

• **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

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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.

imports						
04 Terr Branch1		*				
		No files	were f	ound.		
Name		Vendor	LOB	ProcessDate	File Name	
Select All D	eSelect All	Move file a	after in	iport 🗖	Initial Import	
					Setup	Import

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

Rating			Servicin
View			Setup
			Tax Aut

- 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.

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integration	୍ୟ	\$	The Hartford	ExpressWay	Web Application - Rating	ACORD	ACORD
Downloads	Q	P	The Hartford	Hartford eSubmissions	Web Aplication - Poicy Submission	ACORD	ACORD
IVANS	ୟ	4	The Hartford	Hartford eSobmissions - QA	Web Aplication - Policy Submission	ACORD	ACORD
Download Defaults	Q	7	Liserve LSC, Inc.	Wini SC	Windows Application - Rating	190	ISC
Rating Vendors							

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

Upload/Download			Servicing
View			Setup
L'			Tax Autionity

- 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.

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SEARCH	ORGANIZATION   REPOR	IS   CAMPAICNS		Bookmarks: Expand   Add   Remove Selected
Use the navigation below to access Nexsure setup information.				
Setup Console 🛛 🛛	Download Defaults			
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Rating Vendors     Lookup Management	Commerical Lines Downloadsi	Commercial Lines	*	
Opportunities     Print Blank Forms	Personal Lines Downloadsi	Personal Lines	Y	
Programs     Promoted Templates	L			DownloadDefaultz

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

□View □Add □Modify □Delete ▼Setup Tax Arthority	I	IVANS	Servicing				
		View	hha 🗌	Modify	Delete		Setup Tax Authority

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.

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- Selecting only **View** rights will only allow the summary screen to be displayed.
- Selecting Add rights will activate the [Add New] link allowing the addition of a new IVANS account.
- 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.

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Use the navigation below to						
Setup Console	IVANS					
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Download Defaults						TVANS
						(1991)

• Added security to binder tab.

Binders				Organizatio
View	Modify	Delete		Policy

- 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.

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