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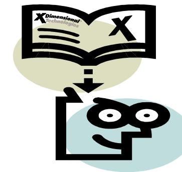


Tips and Facts

Issue 9

In This Issue

- Adding Employees and Assigning Security Rights
- Terminating Employees
- Reactivating Employees

Adding Employees and Assigning Security Rights

How to Add Employees for the Organization

Since employees may exist within multiple levels of the Organization, it is easiest to add all Employees to the Organization level and then assign them to their applicable levels: Regions, Territories, and Branches. Adding Employees to the Organization level does not automatically give them security rights to this level. Security rights should only be added to the appropriate level. To add new Employees follow these steps:

1. On the Primary menu, click the **Organization** link to display the Organizations card file.

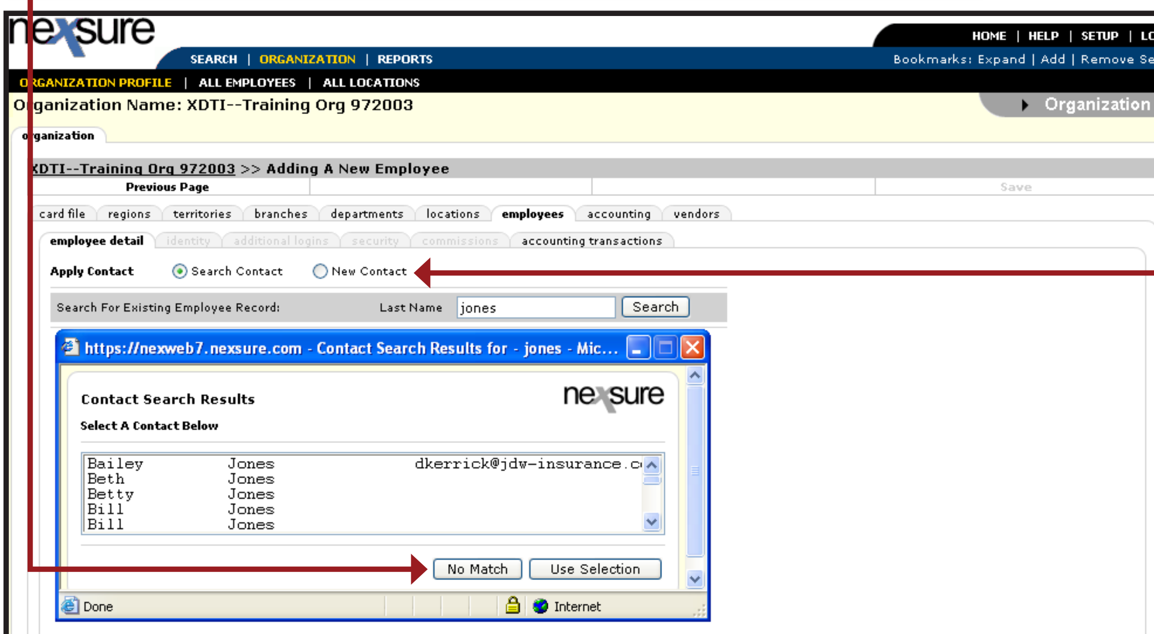
2. Click the **Employees** tab to display a summary view of all Employees within the Organization.

3. Click the **Add New** link to display the Add New Employee screen.

Note: Before adding anything in Nexsure, it is important to use the search features to keep from adding the same information again. Enter the last name and click the Search button to display all matches.

Tips and Facts

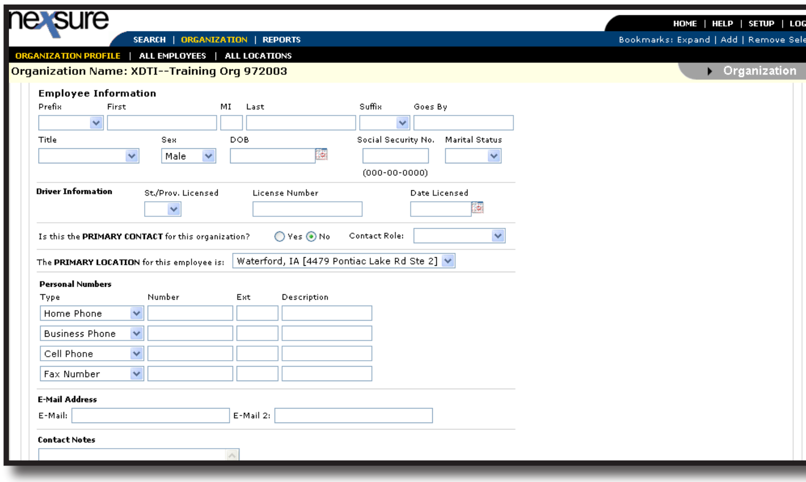
4. If a match exists, either highlight and select **Use Selection** to use the existing name or select **No Match** because the employee already exists and does not need to be associated again at this level.



5. If no information is displayed or **No Match** is selected, click the **New Contact** option to display the fields for entering employee information.

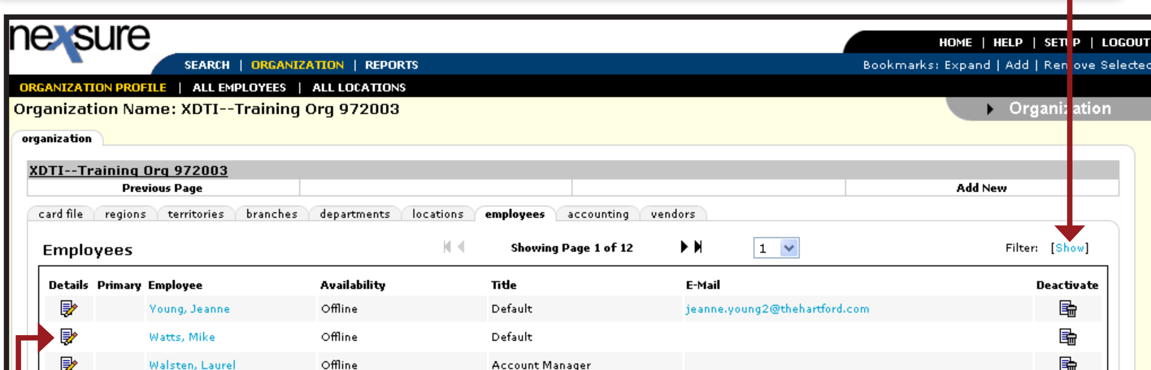
Note: When adding new employees, it is important to note that not only will the search result in employee records, but also contacts (added to your organization at any level) that meet the search criteria.

Tips and Facts



How to Edit Employees for the Organization

1. Use the **[Show]** link to filter through employees by entering specific criteria. Click the **Search** button to return all matching employees.

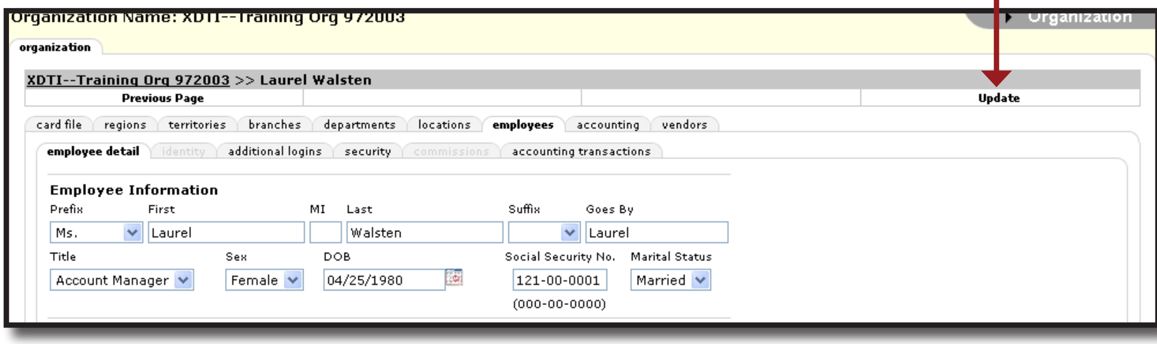


2. To edit employee details, click the **Details** icon of the appropriate employee.

Note: If the selected employee has been associated at different levels and is modified, all records will be changed. When an existing employee is used elsewhere in Nexsure, an association to the original record is made, not a copy of the existing record.

Tips and Facts

3. After editing the record, click the **Update** link in the navigation toolbar to store the modifications.



How to Add/Edit Employees for the Region

Adding employees to the Region level does not automatically give them security rights to this level. Security rights should only be added to the appropriate login level. Add employees to the Region level only if they will need access at this level. Since the Region level will not allow assignment to clients or policies, Service Personnel will not normally need access to this level. Make sure not to add an entirely new employee but to search and use the employee added at Organization level. To associate employees to the Region level, follow these steps:

1. On the Primary menu, click the **Organization** link to display the Organizations card file.

2. Click the **Regions** tab to display a summary view of all Regions.

3. Follow steps 3-5 from ***How to Add Employees for the Organization*** (Pages 1-2). It is critical that you use the **Search** option and associate the employee to this level since they were previously added at the Organization level.

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Tips and Facts

How to Add/Edit Employees for the Territory

Adding employees to the Territory level does not automatically give them security rights to this level. Security rights should only be added to the appropriate login level. If the employee will receive commission, they must be associated to this level whether security access is granted or not. They are added to Territory level so that checks may be issued to them. Any other employees would only be added at this level if security is to be granted. Make sure not to add an entirely new employee but to search and use the employee added at Organization level. Granting an employee security at this level will not only provide them with security access to the selected Territory but also the Branches that are added to this Territory. To associate employees to the Territory level, follow these steps:

1. On the Primary menu, click the **Organization** link to display the Organizations card file.
2. Click the **Branch** tab to display a summary view of all Branches.
3. Follow steps 3-5 from ***How to Add Employees for the Organization*** (Pages 1-2). It is critical that you use the **Search** option and associate the employee to this level since they were previously added at the Organization level.

How to Add/Edit Employees for the Branch

Adding employees to the Branch level does not automatically give them security rights to this level. Security rights should only be added to the appropriate login level. If the employee will receive commission or will be assigned to the client or policy, they must be associated at this level whether security access is granted or not. Any other employees would only be added to this level if security is to be granted at this level. Make sure not to add an entirely new employee but to search and use the employee added at Organization level. Granting an employee security at this level will only provide them with security access to the selected Branch. To associate employees to the Branch level, follow these steps:

1. On the Primary menu, click the **Organization** link to display the Organizations card file.
2. Click the **Territory** tab to display a summary view of all Territories.
3. Follow steps 3-5 from ***How to Add Employees for the Organization*** (Pages 1-2). It is critical that you use the **Search** option and associate the employee to this level since they were previously added at the Organization level.

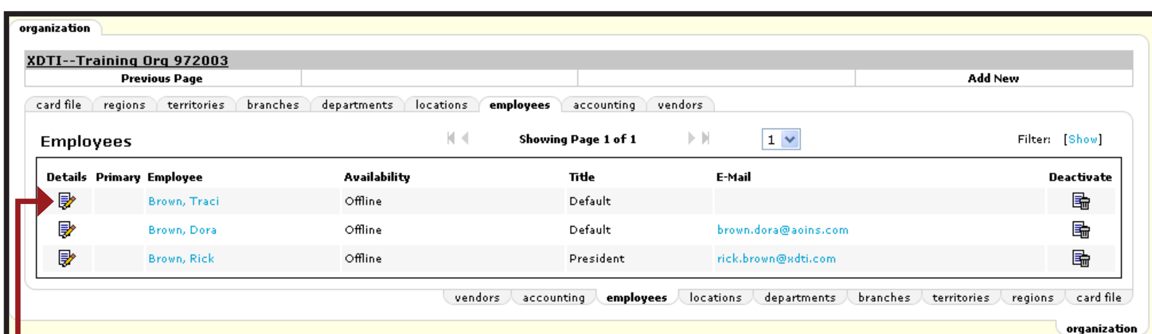
Tips and Facts

How to Assign Employee Security

- Granting an employee security at the **Organization** level will not only provide them with security access to the Organization level but also the Regions, Territories and Branches that are added to the Organization. Only Power Users and some Accounting Personnel should be granted access at this level.
- Granting an employee security at the **Region** level will allow access not only to the selected Region but the Territories and Branches associated to the selected Region. If the employee will be working at all these levels, grant security here and not at the Territory and Branch for this Region. If the employee must also be assigned to the client or policy, add just as an employee to the Branch without security. If the employee is paid commission, add as an employee to the Territory and Branch without security at these levels.
- Granting an employee security at the **Territory** level will not only provide them with security access to the Territory level but also the Branches that are added to the Territory. If they are only paid commission and will not need to have Territory security, do not add security but only associate the employee to this level.
- Granting an employee security at the **Branch** level will only provide them with security access to the selected Branch.

1. Begin by accessing the employee's detail information at the level that security is to be added (Organization, Region, Territory or Branch).

Note: The employee must have been previously added to the appropriate level before adding security.



2. Click the **Details** icon of the appropriate employee.

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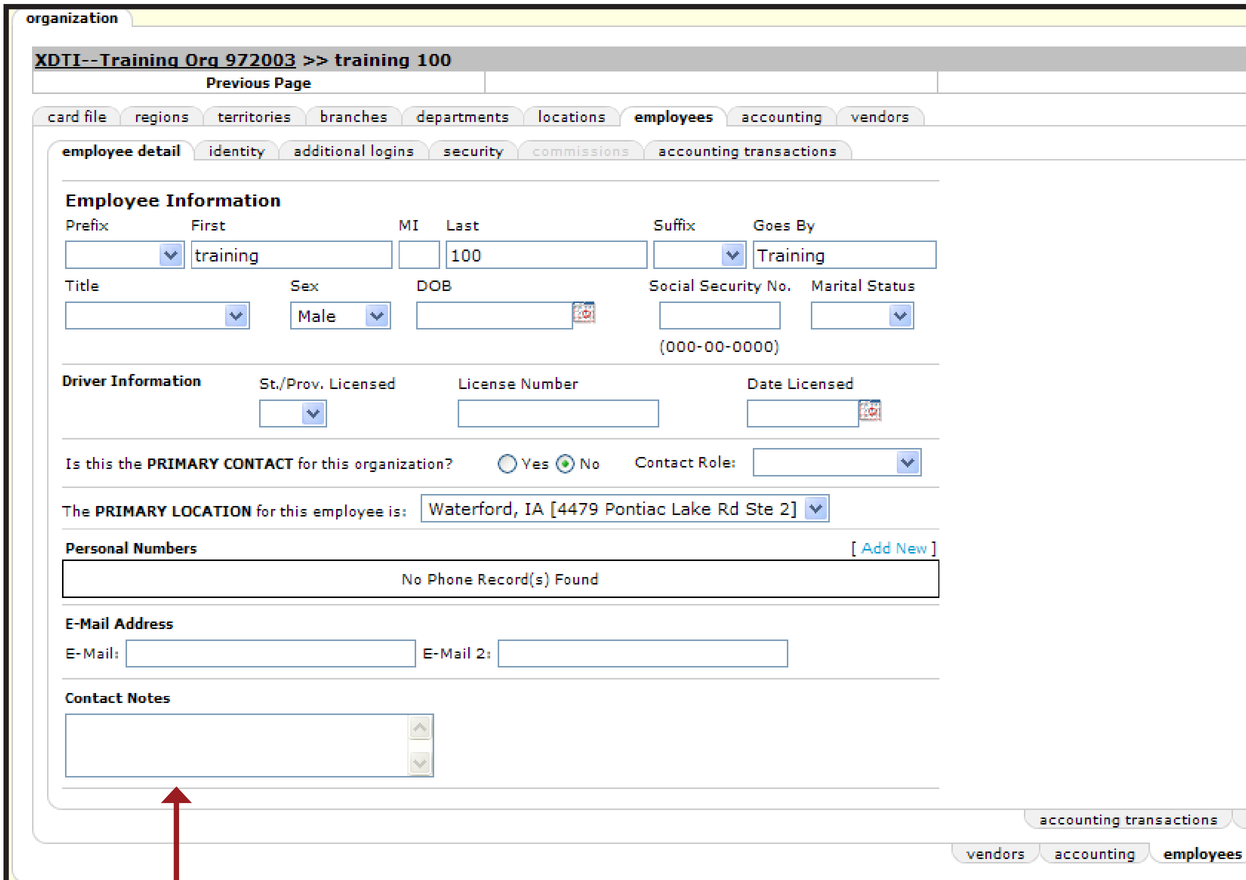
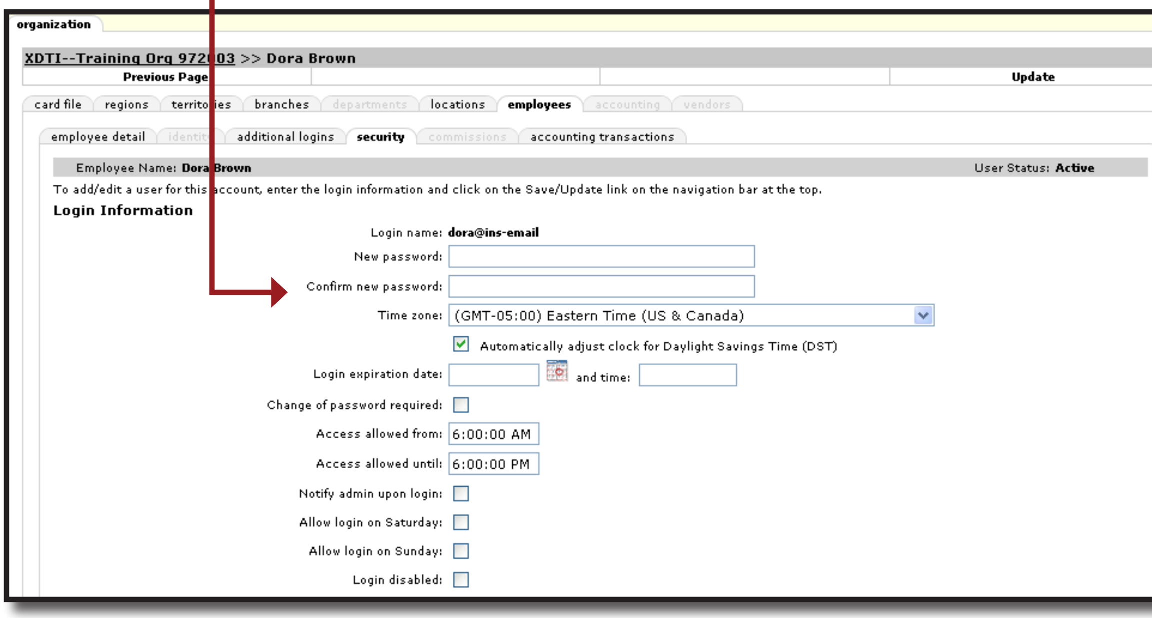


3. At the bottom of the Employee Detail screen there is a link: **Click here to make this contact a user**. This link is only available prior to activating an employee's security. Click the word **here** to display the Security page.

Note: If security has been granted elsewhere, the link at the bottom of the page will not appear, but the security tab is active instead.

Tips and Facts

4. Complete the login information on this screen to grant the employee access to your Nexsure site at this level.



5. After entering all the information, click the **Save** link on the Navigation toolbar and the screen is refreshed now displaying the security link at the bottom of the page.

Note: Make sure to choose a Time Zone and select the Daylight Savings Time check box if applicable. Enter any access limitations required for your Organization by completing all the boxes to allow specific time frames or even provide a specific login expiration date.

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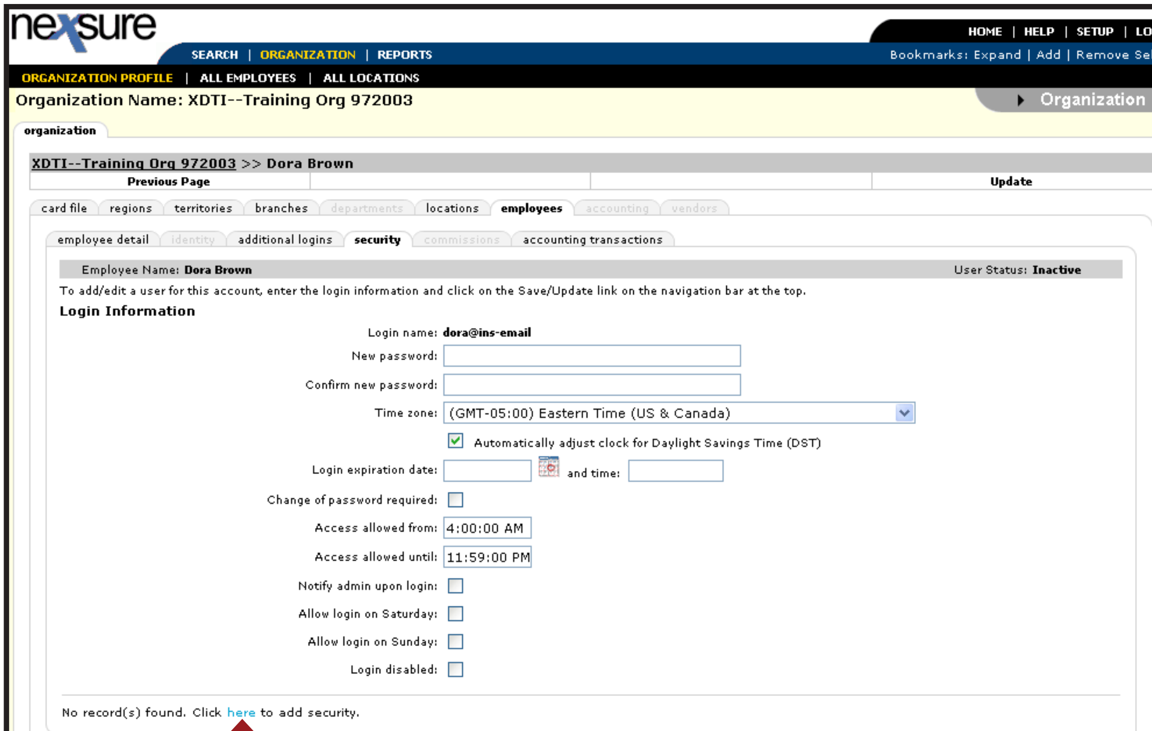
Tips and Facts



6. Click the link embedded in the sentence: **No record(s) found. Click here to add security.**

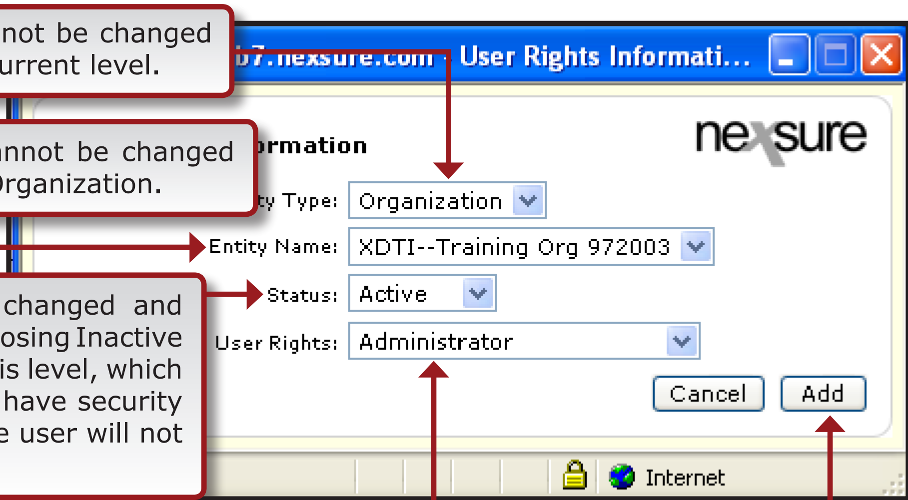
Tips and Facts

The **User Rights Information** window appears.

The **Entity Type** cannot be changed and is preset to the current level.

The **Entity Name** cannot be changed and is preset to the Organization.

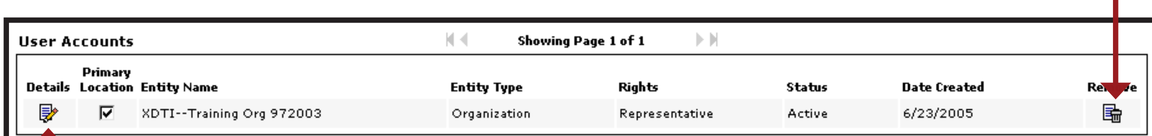
The **Status** can be changed and defaults to Active. Choosing Inactive disables security at this level, which means if they do not have security at any other level; the user will not be able to login.



User Rights determine the level of security that is assigned to the user. User Rights are added through Security Setup, which is not covered in this document. For details, see **Setup - User Rights Templates** in **Nexsure Help.**

Clicking **Add** saves changes and **Cancel** aborts. When Add is clicked the screen refreshes and the security displays at the bottom of the employee file.

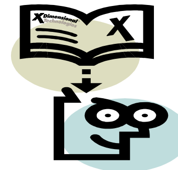
7. Security for this employee may also be removed by clicking the **Remove** icon. Removing all user accounts for an employee releases the employee's login.

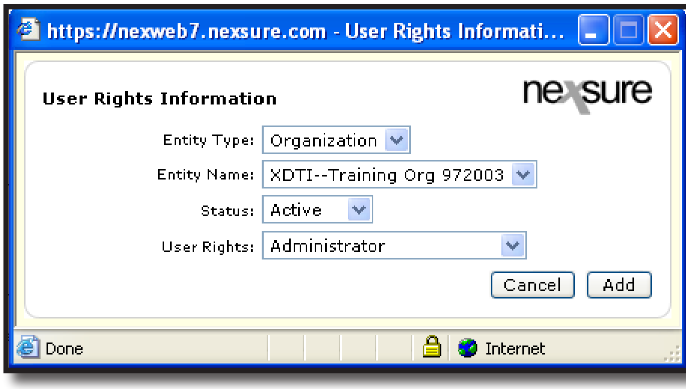


User Accounts — Showing Page 1 of 1

Details	Primary Location	Entity Name	Entity Type	Rights	Status	Date Created	Remove
	☑	XDTI--Training Org 972003	Organization	Representative	Active	6/23/2005	

8. Clicking the **Details** icon displays the **User Rights Information** pop-up to allow security to be modified as necessary.

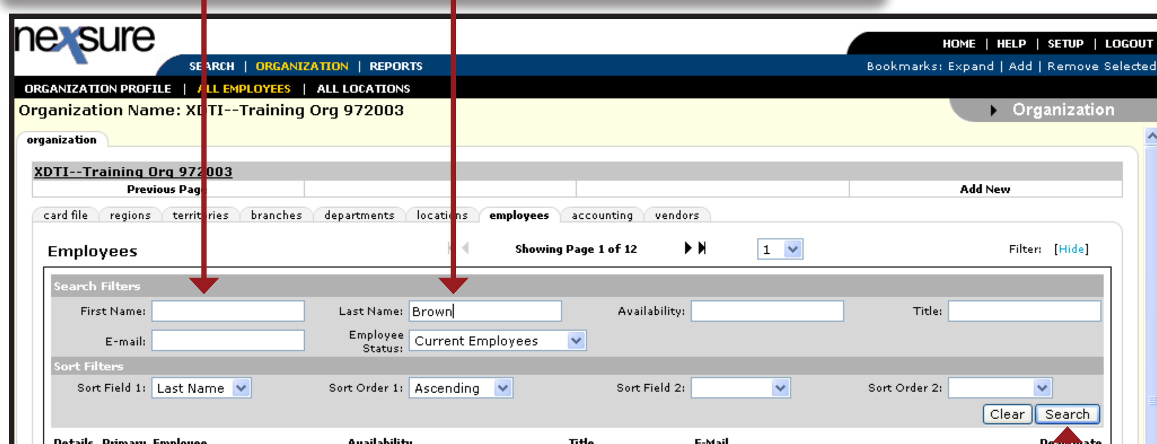




Terminating Employees

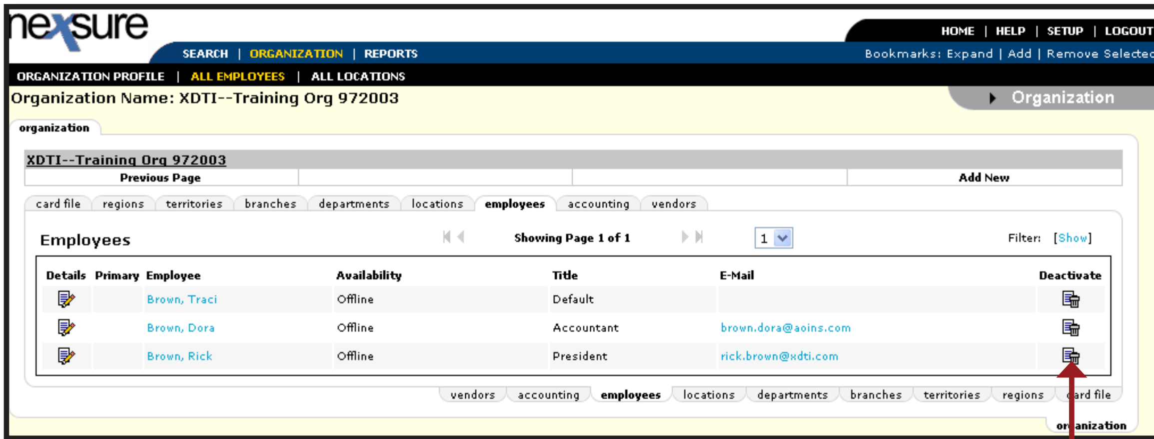
When an employee is no longer employed, they may be removed from the Active employee list but not permanently deleted. To deactivate or terminate an employee follow the instructions below:

1. Click **Organization**, located on the Primary Menu.
2. Click the **Employees** tab at Organization level since all employees are added to this level.
3. Click the **[Show]** link to display the Search criteria fields.
4. Enter the **First Name** and/or **Last Name** of the employee.



5. Click the **Search** button to show all matches. Before terminating the employee make sure to remove their security as shown in #7 of “How to Assign Employee Security”.

Tips and Facts



6. Click the **Deactivate** icon to the right of the Employee's name. Always remove security before deactivating an employee.

7. Click **OK** to save the information or **Cancel** to abort.

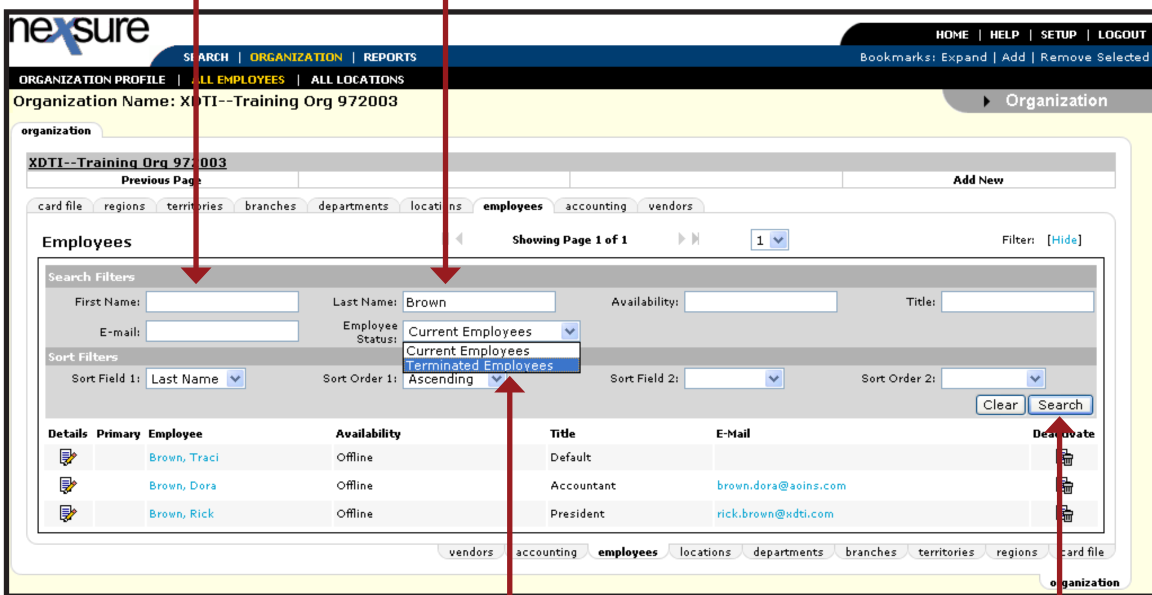
Reactivating Employees

If the employee returns to your employment, do the following to re-activate them:

1. Click **Organization**, located on the Primary Menu.
2. Click the **Employees** tab at Organization level since all employees are added to this level.
3. Click the **[Show]** link to display the Search criteria fields.

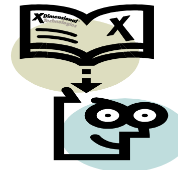
Tips and Facts

4. Enter the **First Name** and/or **Last Name** of the employee.

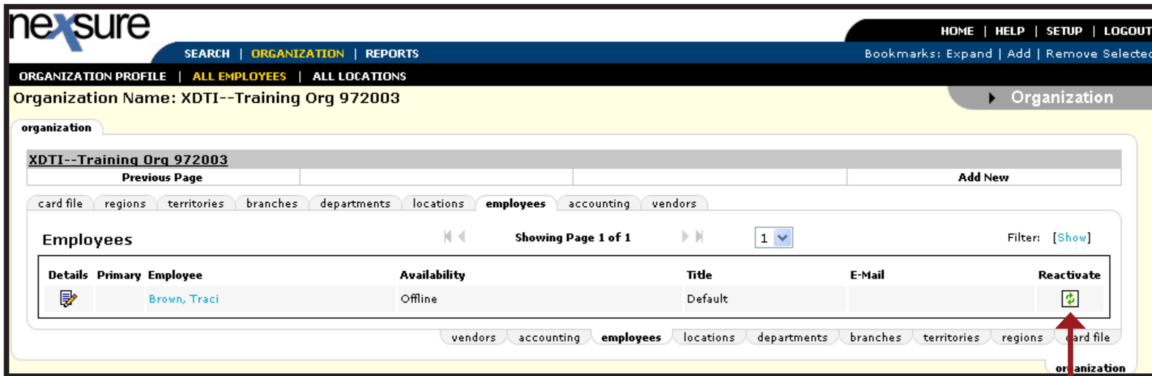


5. Select **Terminated Employees** from the **Employee Status** drop-down menu.

6. Click the **Search** button to show all matches.

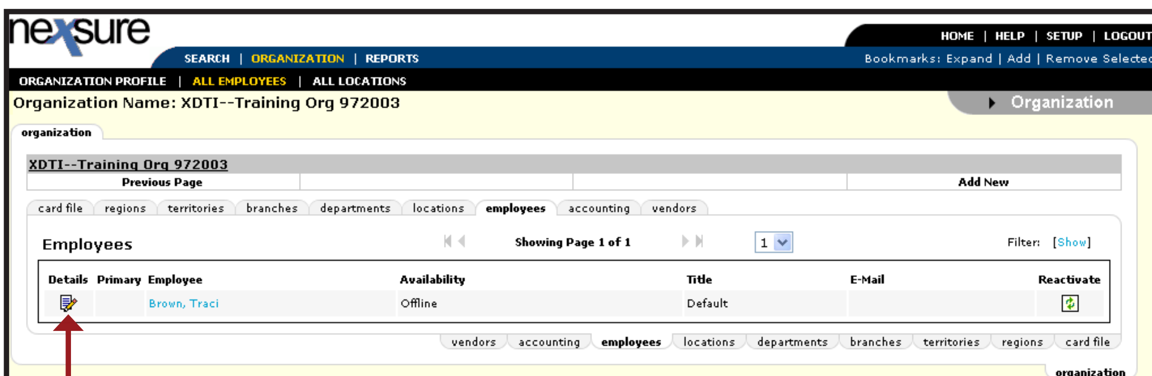


Tips and Facts



7. Click the **Reactivate** icon to the right of the Employee's name.

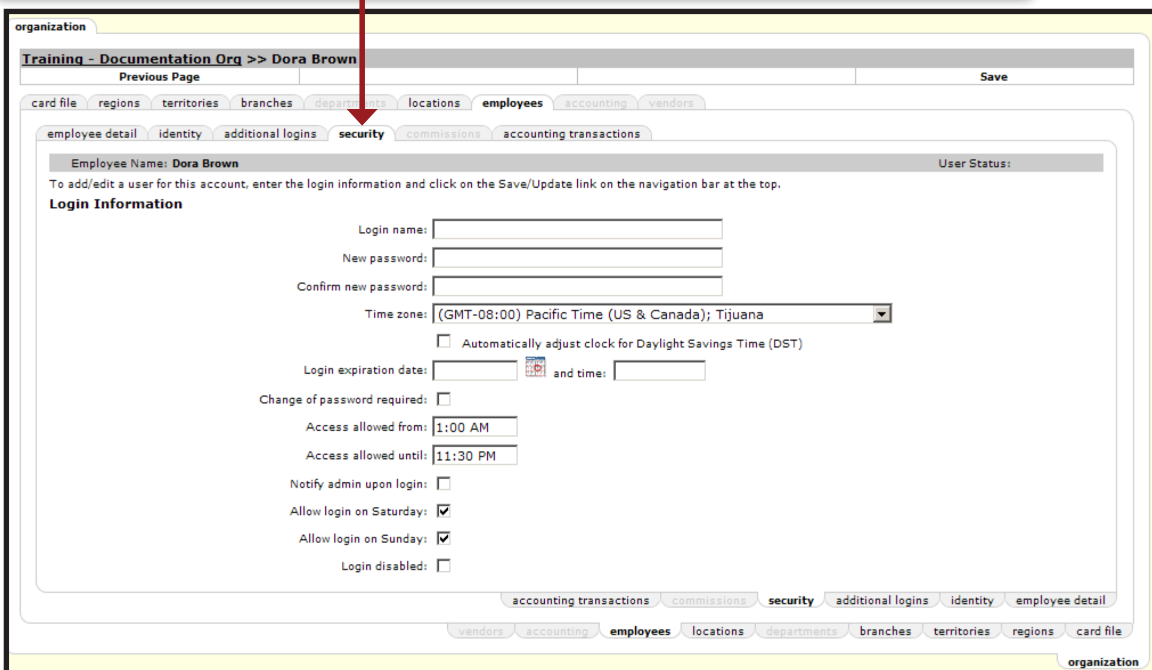
8. Click **OK** to complete the process. Clicking **Cancel** will abort the process.



9. To activate log-in security, click the **Details** icon to the left of the employee name to display their details.

Tips and Facts

10. Click the **security** tab to create a login and add security if the reactivated employee will have access to your Nexsure site. To add security, see "How to Assign Employee Security" earlier in this Tips & Facts.



Once the employee is reactivated and security added, the user can log into Nexsure.