



Insure Site Users – Permissions Definitions

The below guide will provide a definition to the various permissions when selecting the permissions for an Insured Site User Group.

GROUP NAME	
<input type="text" value="INSURED SITE USERS"/>	<input checked="" type="radio"/> Insured <input type="radio"/> Broker
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Certificates

Set the desired permissions for processing certificates within the Insured Site.

- Access
 - Permits the Insured Site User to access the Certificate Manager to view the certificates.
- Create
 - Permits the Insured Site User to create and/or modify a certificate, depending upon which ACORD Form(s) the agency selects.
- Create from Sample COI
 - Permits the Insured Site User to start their certificate by uploading a Sample COI.
- Create from Contract
 - Permits the Insured Site User to start their certificate by uploading a contract for parsing.
- Create from Insurance Clause
 - Permits the Insured Site User to start their certificate by copying and pasting insurance clause or requirements for parsing.
- Import and Export
 - Permits the Insured Site User to Import and Export certificates/holders.
- Send Email
 - Permits the Insured Site User to distribute certificates from within Certificate Hero via email.
- Send Fax
 - Permits the Insured Site User to distribute certificates from within Certificate Hero via fax.

Description of Operations

- Create
 - Permits the Insured Site User to edit the Description of Operations on a certificate.

Notes

Set the permissions that will enable an Insured Site User to either access or create Insured and/or Certificate Notes.

- Insured Notes Access
 - Permits the Insured Site User to view Insured notes.
- Insured Notes Create
 - Permits the Insured Site User to add Insured notes.
- Certificate Notes Access
 - Permits the Insured Site User to view Certificate notes.
- Certificate Notes Create
 - Permits the Insured Site User to add Certificate notes.

Endorsements

Set the permissions that will enable the level of access an Insured Site User has when viewing, creating and/or deleting endorsement forms within the endorsement form library, and insured endorsements.

- Access
 - Permits the Insured Site User access to the Endorsement Manager.
- Create
 - Permits the Insured Site User to create new and modify existing endorsements.
- Delete
 - Permits the Insured Site User to delete an existing endorsement.
- Form Access
 - Permits the Insured Site User access to the Endorsement Form Manager.
- Form Create
 - Permits the Insured Site User to create new and modify existing endorsements forms.
- Tags Allowed
 - Permits the Insured Site User to use endorsement tags.
- Tags Editable
 - Permits the Insured Site User to edit existing endorsement tags.

Certificate Templates

- Access
 - Permits the Insured Site User to view the existing certificate templates.
- Create
 - Permits the Insured Site User to create certificate templates.
 - Permits the Insured Site User to select which ACORD Forms for which they can create templates.

LOB (Line of Business) Templates

Set the permissions that will enable the level of access an Insured Site User has when viewing, creating and/or deleting LOB Templates.

- Access
 - Permits the Insured Site User access the LOB Profiles Manager and access the LOB Profiles while processing certificates.
- Create
 - Permits the Insured Site User to create, edit, deactivate and set LOB profiles as default.
- Delete
 - Permits the Insured Site User to delete existing LOB profiles from the manager.

Language Library

Set the permissions that will enable the level of access an Insured Site User has when viewing, creating and/or deleting Language Library Templates.

- Access
 - Permits the Insured Site User to access the Language Library.
- Create
 - Permits the Insured Site User to create new Language Library templates.
- Delete
 - Permits the Insured Site User to delete existing Language Library templates.

Email Templates

Set the permissions that will enable the level of access an Insured Site User has to create email templates for outbound Certificate Hero emails.

- Access
 - Permits the Insured Site User to access the email templates.
- Create
 - Permits the Insured Site User to revise the existing email templates.

Holder Management

Set the permissions that will enable the level of access an Insured Site User has to the Holder Library.

- Access
 - Permits the Insured Site User to view the existing holders in their Holder Library.
 - Permits the Insured Site User to select a holder from their Holder Library when processing certificates.
 - Please Note: The Insured Site User will need access enabled if they are permitted to issue their own certificates.
- Create
 - Permits the Insured Site User to create, modify, deactivate and activate holders within their Holder Library.
- Delete
 - Permits the Insured Site User to delete existing holders from their Holder Library.

Named Insured Management

Set the permissions that will enable the level of access an Insured Site User has to the Named Insured Library.

- Access
 - Permits the Insured Site User to view the existing holders in their Named Insured Library.
 - Permits the Insured Site User to select a holder from their Named Insured Library when processing certificates.
- Create
 - Permits the Insured Site User to create, modify, deactivate and activate holders within their Named Insured Library.
- Delete
 - Permits the Insured Site User to delete existing holders from their Named Insured Library.

Analytics

- Permits the Insured Site User to view certificate processing analytic reports for their account.

Signatures

Set the permissions that will enable the level of access an Insured Site User has to the Signatures manager.

- Access
 - Permits the Insured Site User to view the existing signatures in the Signature Library.
 - Permits the Insured Site User to select a signature from the Signature Library when processing certificates.
- Create
 - Permits the Insured Site User to create, modify, deactivate and activate signature within the Signature Library.
- Delete
 - Permits the Insured Site User to delete existing signature from the Signature Library.

Inbound Certificates

Set the permissions that will enable the level of access an Insured Site User has to the Inbound Certificates.

- Access
 - Permits the Insured Site User to access and view Inbound Certificates.
- Create
 - Permits the Insured Site User to create and import certificates into the Inbound Certificates menu.

Agency Contacts

Set the permissions that will enable the level of access an Insured Site User has to the Agency Contacts menu.

- Access
 - Permits the Insured Site User to view the existing Agency Contacts in the Agency Contacts Library.
 - Permits the Insured Site User to select an Agency Contacts from the Agency Contacts Library when processing certificates.
- Create
 - Permits the Insured Site User to create, modify, deactivate and activate Agency Contacts within the Agency Contacts Library.
- Delete
 - Permits the Insured Site User to delete existing Agency Contacts from the Agency Contacts Library.

CI Documents

Set the permissions that will enable the level of access an Insured Site User has to the CIDs menu.

- Access
 - Permits the Insured Site User to view the existing CID form in the CIDs Manager.
 - Permits the Insured Site User to select an CID form the CIDs Tab when processing certificates.
- Create
 - Permits the Insured Site User to create, modify, deactivate and activate CID form within the CIDs Manager.
- Delete
 - Permits the Insured Site User to delete existing CID forms from the CIDs Manager.