



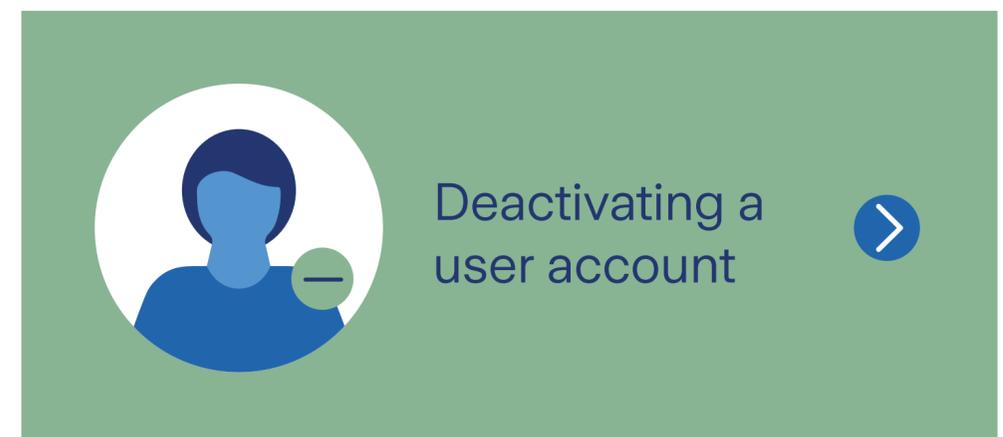
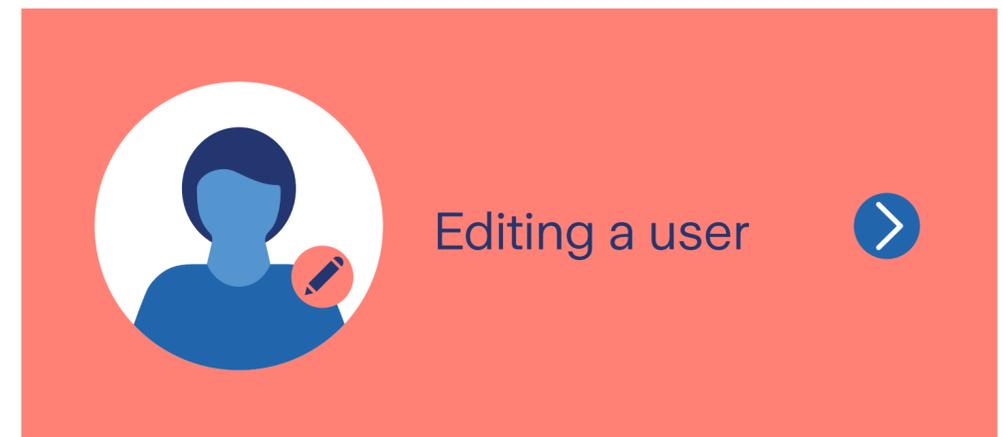
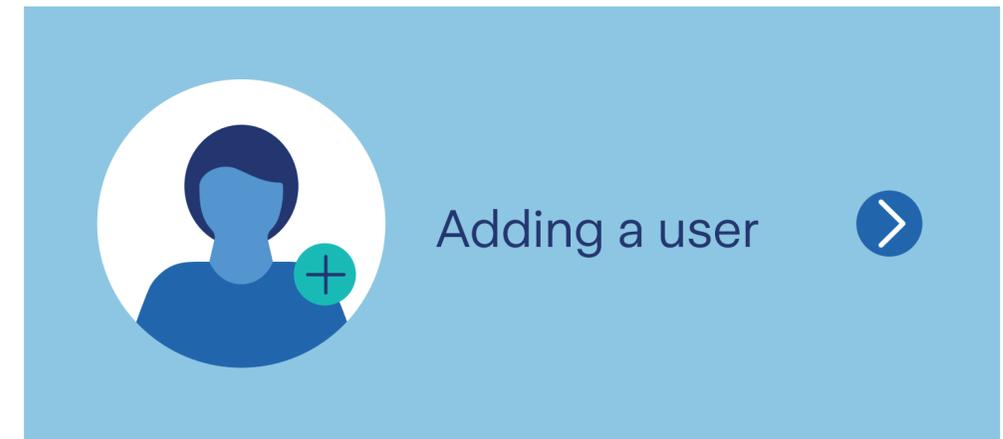
Zurich Online user guides



Zurich Online has been built with you in mind, but we know that sometimes a helpful hand to navigate systems is needed.

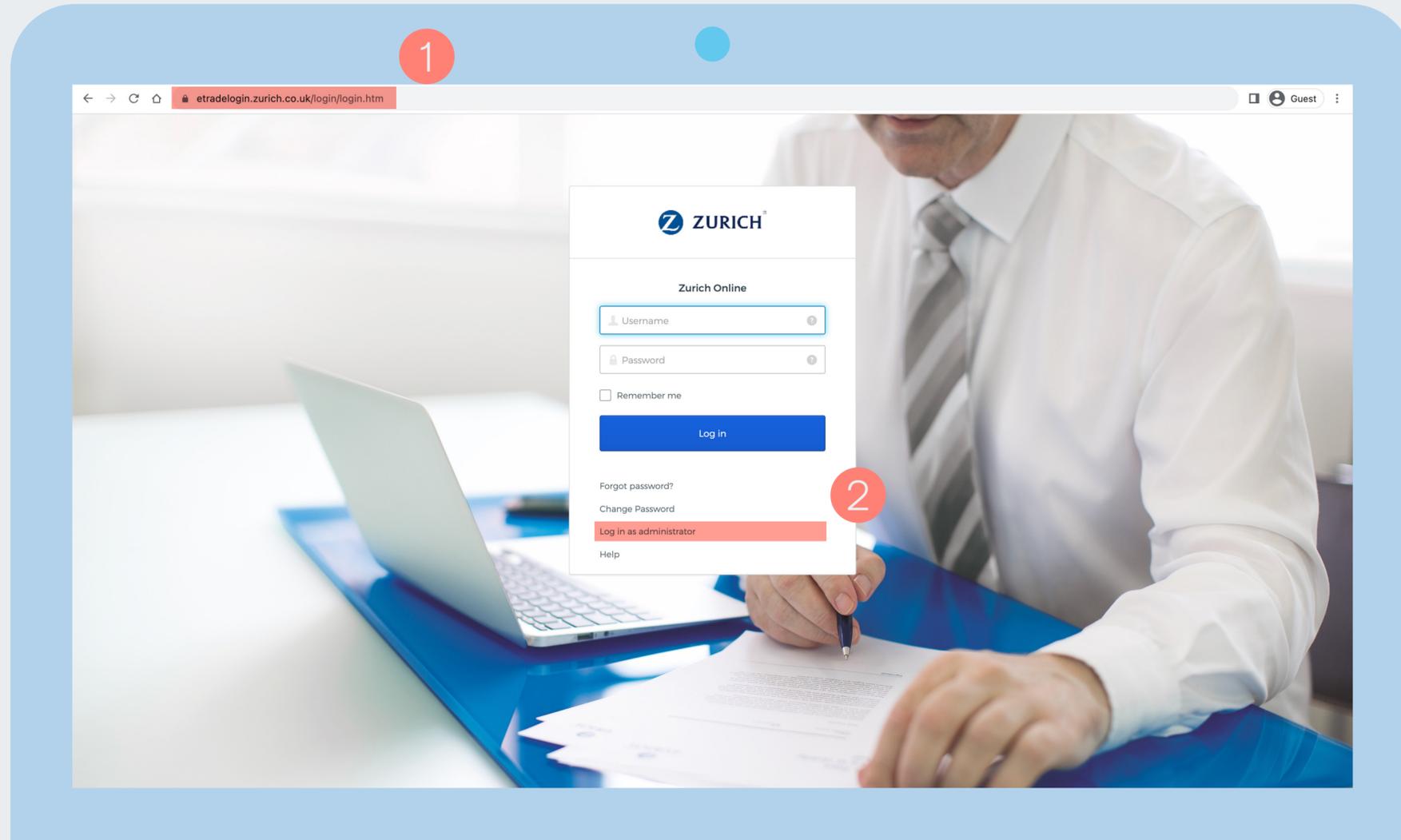
This guide can be used by administrators to manage Adding a User, Editing a User and Deactivating a User.

Please click on the relevant step-by-step guide opposite:





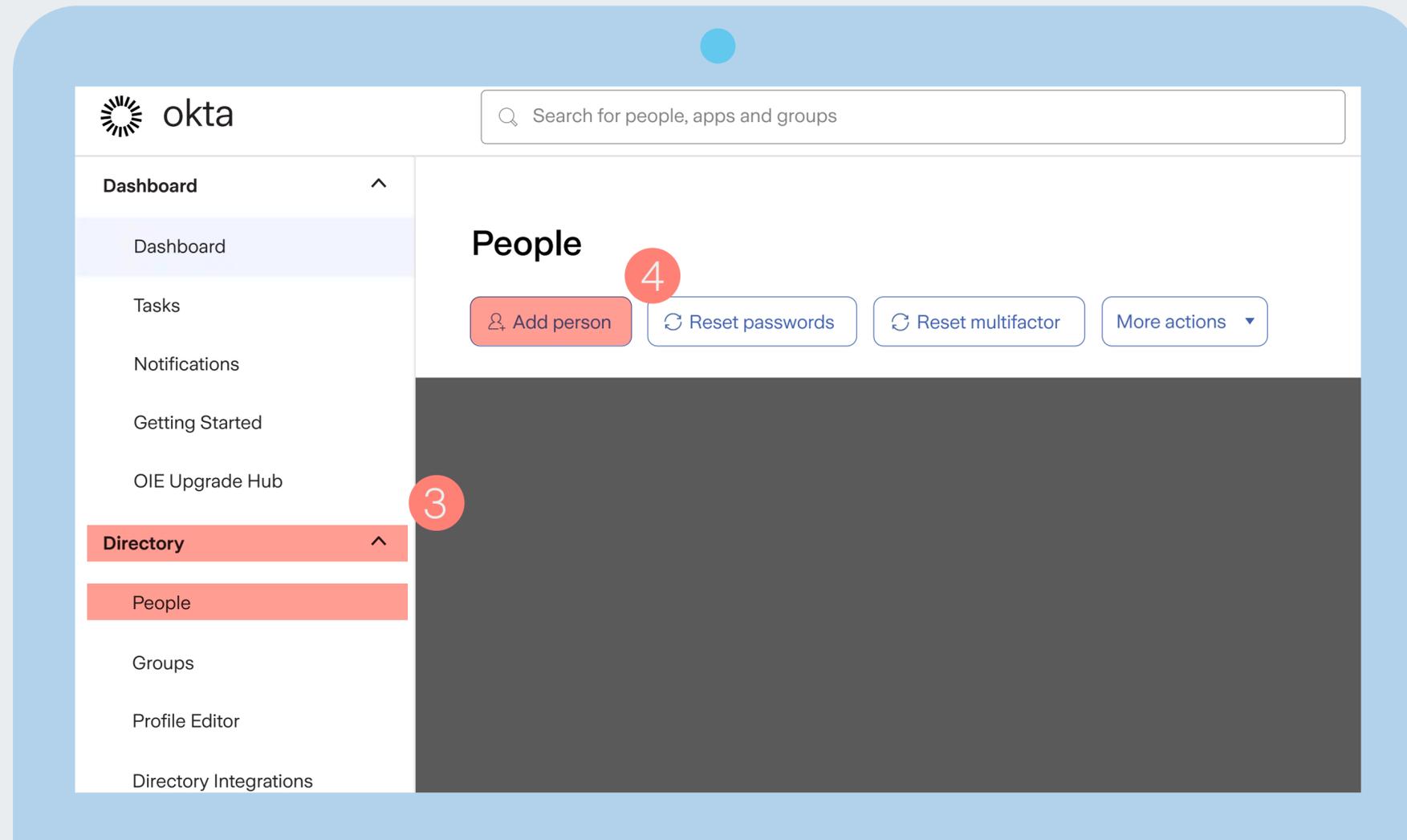
How to add users



- 1 Open **Zurich Broker Online Log in** on a separate tab.
- 2 Below the blue **“Log in”** bar select **“Log in as administrator”** with your normal log on details.



How to add users



- 3 Once logged in, select **Directory** from the menu on the left, then **People**.
- 4 Once you have clicked “**People**”, click “**Add Person**” at the top of the page.



How to add users



Add Person 5

User type [?]

First name

Last name

Username

Primary email

Groups (optional)

Password [?]

Send user activation email now [?]

Do not send unsolicited or unauthorized activation emails. [Read more](#)

5 After selecting “**Add person**”, you will be presented with a form which you will need to complete for each new user you are adding.

If you have any queries please email us at etrade.support@uk.zurich.com or you can call us on **0800 916 0626**.





How to add users



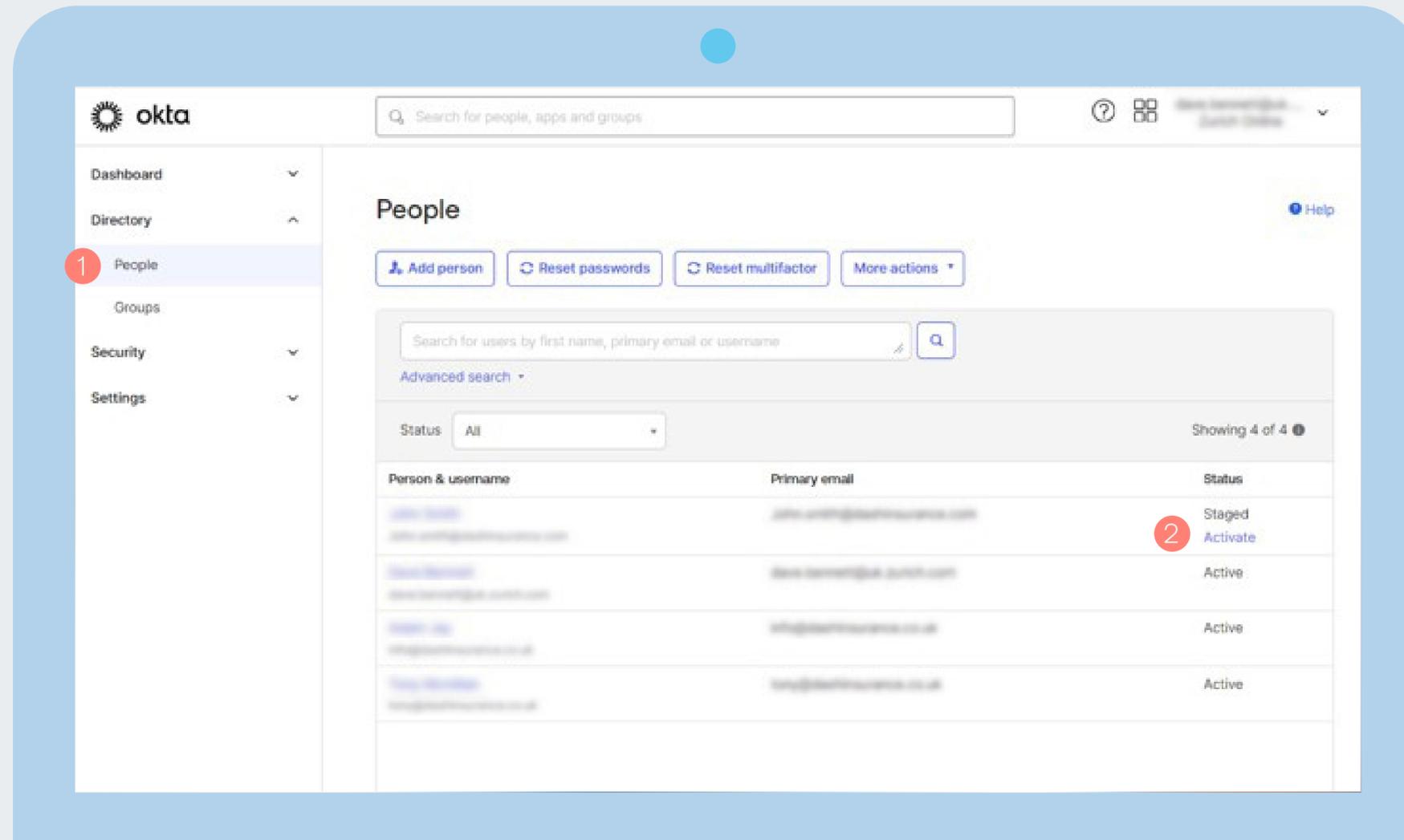
The screenshot shows the 'Add Person' form with the following fields and callouts:

- 6** User type: A dropdown menu with 'User' selected.
- 7** First name: An empty text input field.
- 8** Last name: An empty text input field.
- 9** Username: A text input field with the placeholder text 'Must be an email'.
- 10** Primary email: An empty text input field.
- 11** Groups: A dropdown menu with a list of groups visible.
- 12** Password: A dropdown menu with 'Set by user' selected.
- 13** Send user activation email now: An unchecked checkbox.
- 14** Save buttons: 'Save', 'Save and Add Another', and 'Cancel' buttons at the bottom.

Field	Description	Rules
6 User type	Type of access to the system, only "User" is an option, so no need to change	Cannot be changed
7 First Name	First name of new user	Input the users first name
8 Last Name	Surname of new user	Input the users surname
9 Username	This is the users email	This must be a single users email account, with a corporate/business domain. For example: John.Smith@Insuranceisus.com Generic Email addresses (such as Info@ or Admin@) must not be used Non-corporate email domains (such as @gmail.com or @Yahoo.com) should not be used
10 Primary Email	Should auto populate from the username field	Do not change/amend
11 Groups	Should auto populate based on the Admin's user group	This must remain unchanged, if this is deleted or amended, any new user will not be able to access the portal for their agency
12 Password	Should be left as "Set by user"	This allows the user to choose their own password for logging in
13 Activation Email	Select this to send the new user an email giving them access to the portal	Failure to do this will require the Admin to go back in and "Activate" a user
14 Save/Save & Add Other	Saves users details on the portal	If only a single user is being set up, click "Save" once all the fields have been populated Select "Save & Add another" if more than one user is being set up



How to Activate a user

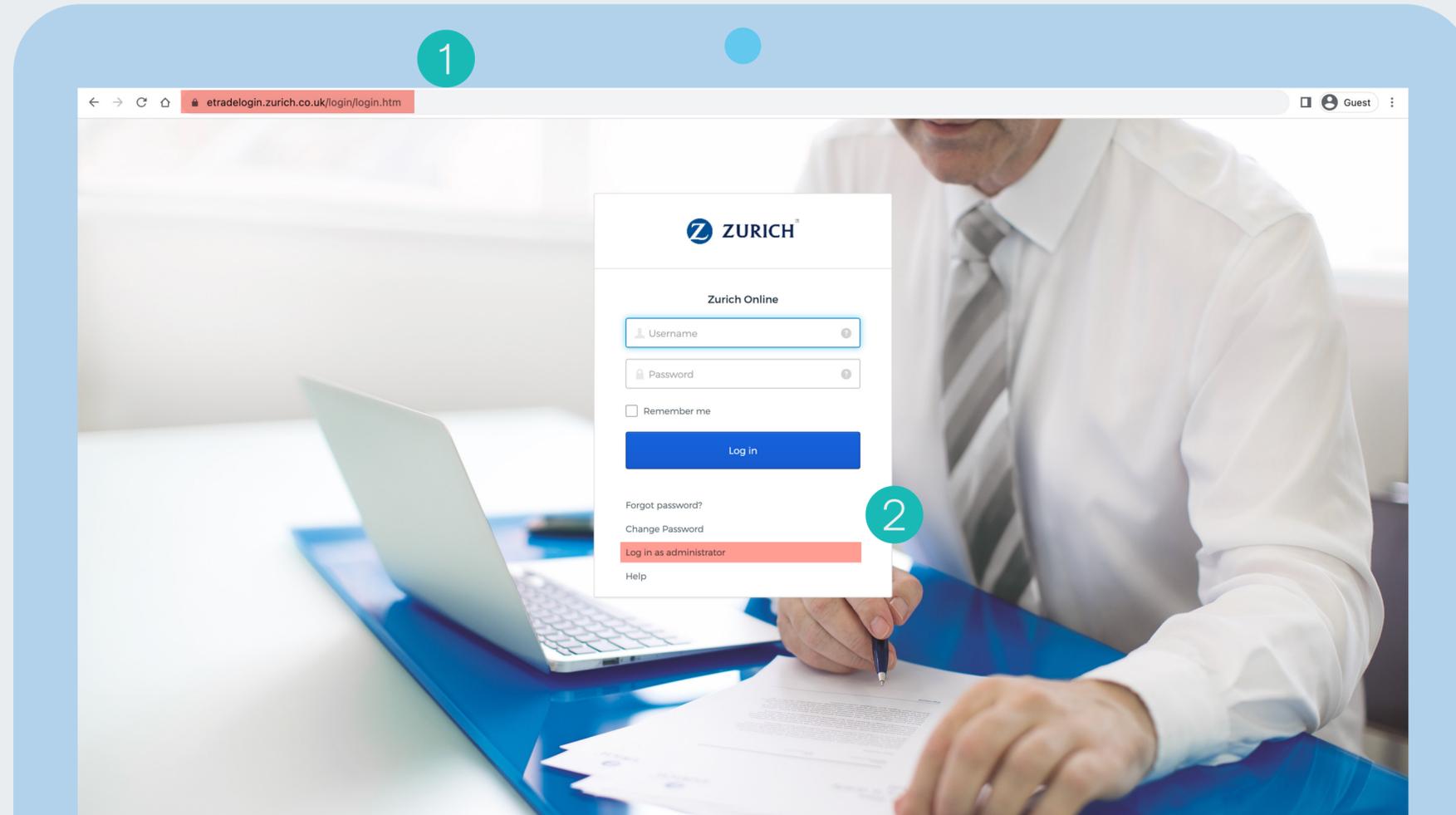


Where a user has been added to the portal but the activation email has not been sent (i.e. changes saved but “**Send activation email**” hasn’t been selected) the following action must be taken:

- 1 Select People from the Directory.
- 2 Identify the new user and click “**Activate**” which should be in blue below the word “**Staged**”.



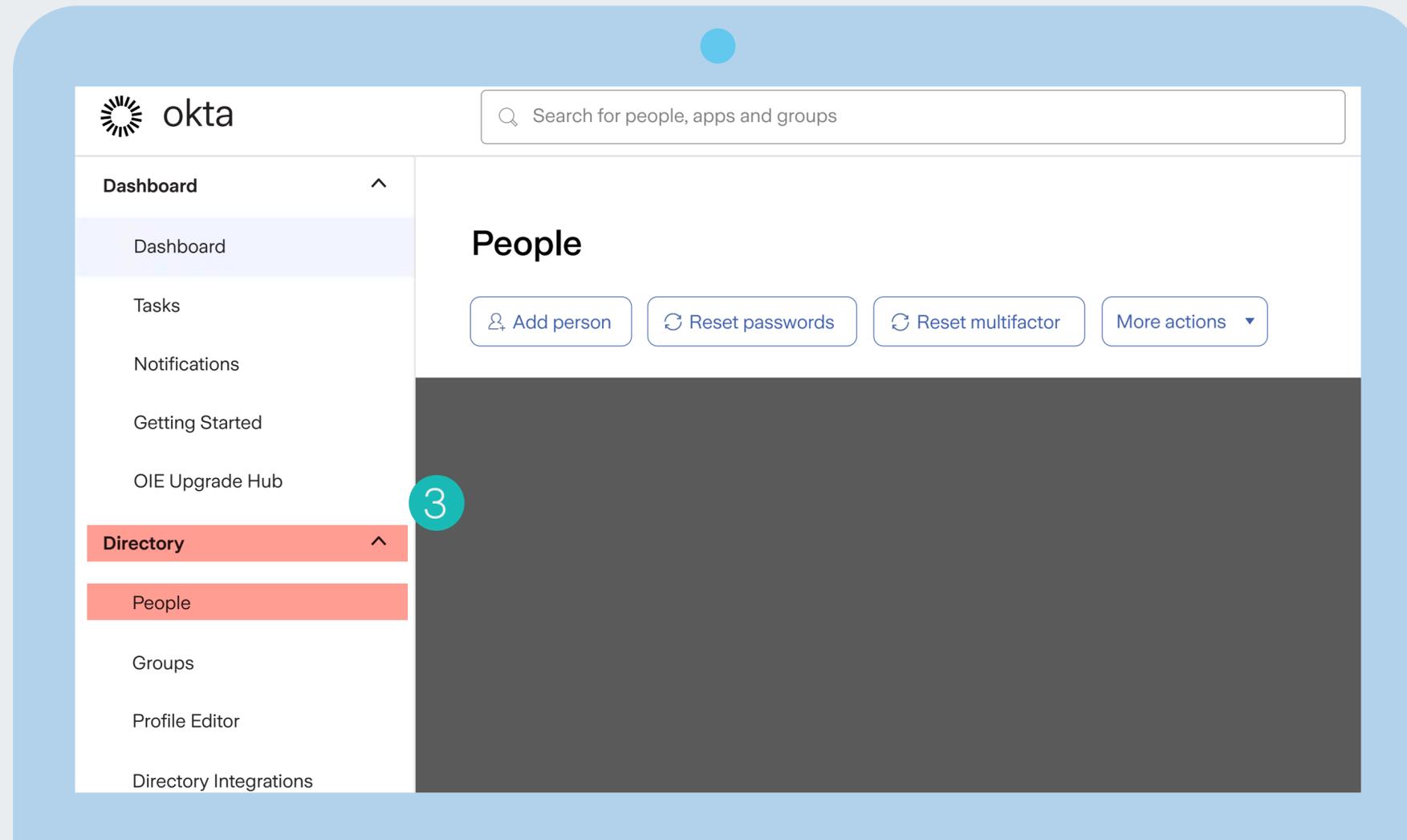
How to edit users



- 1 Open **Zurich Broker Online Log in** on a separate tab.
- 2 Below the blue **“Log in”** bar select **“Log in as administrator”** with your normal log on details.



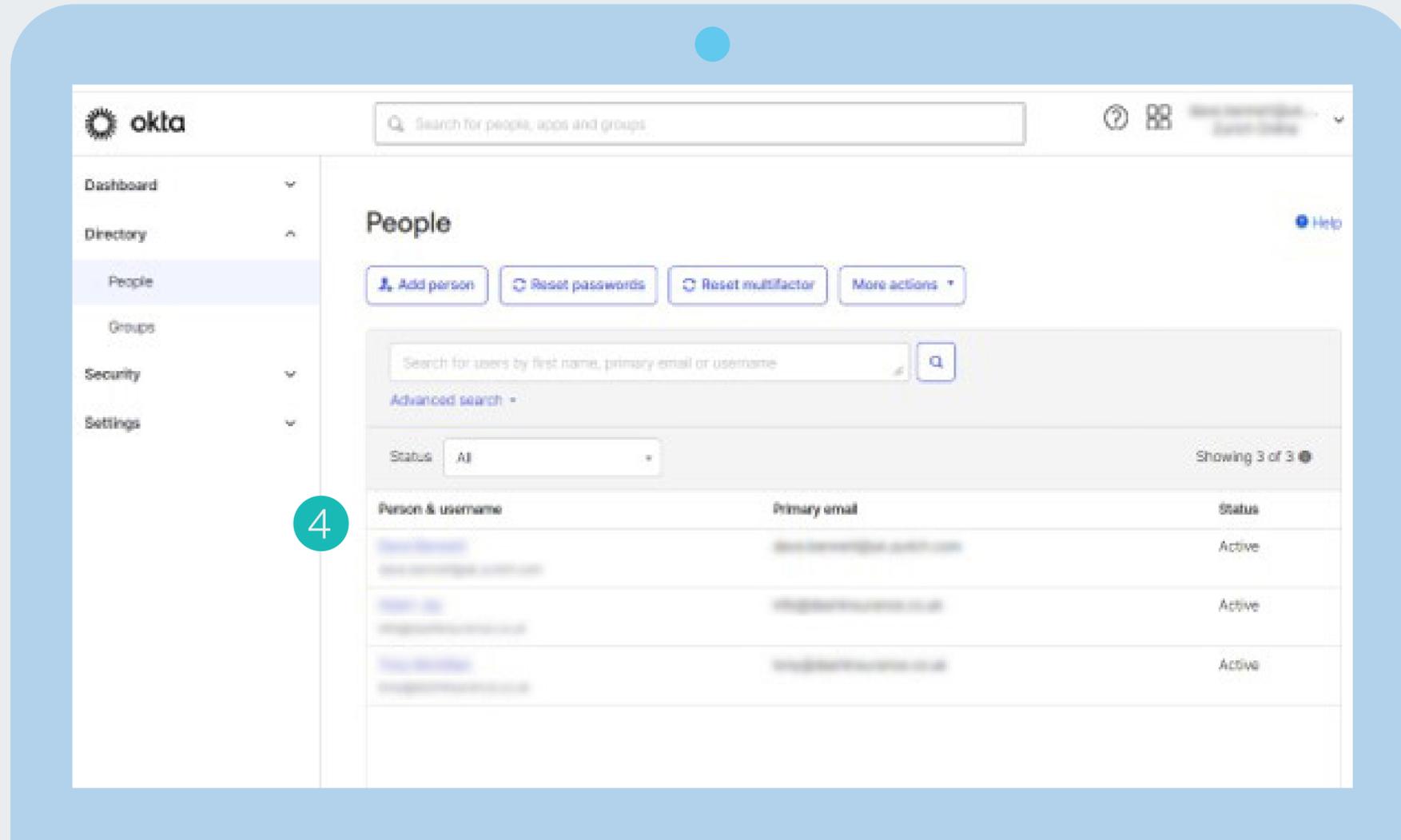
How to edit users



3 Once logged in, select **Directory** from the menu on the left, then **People**.



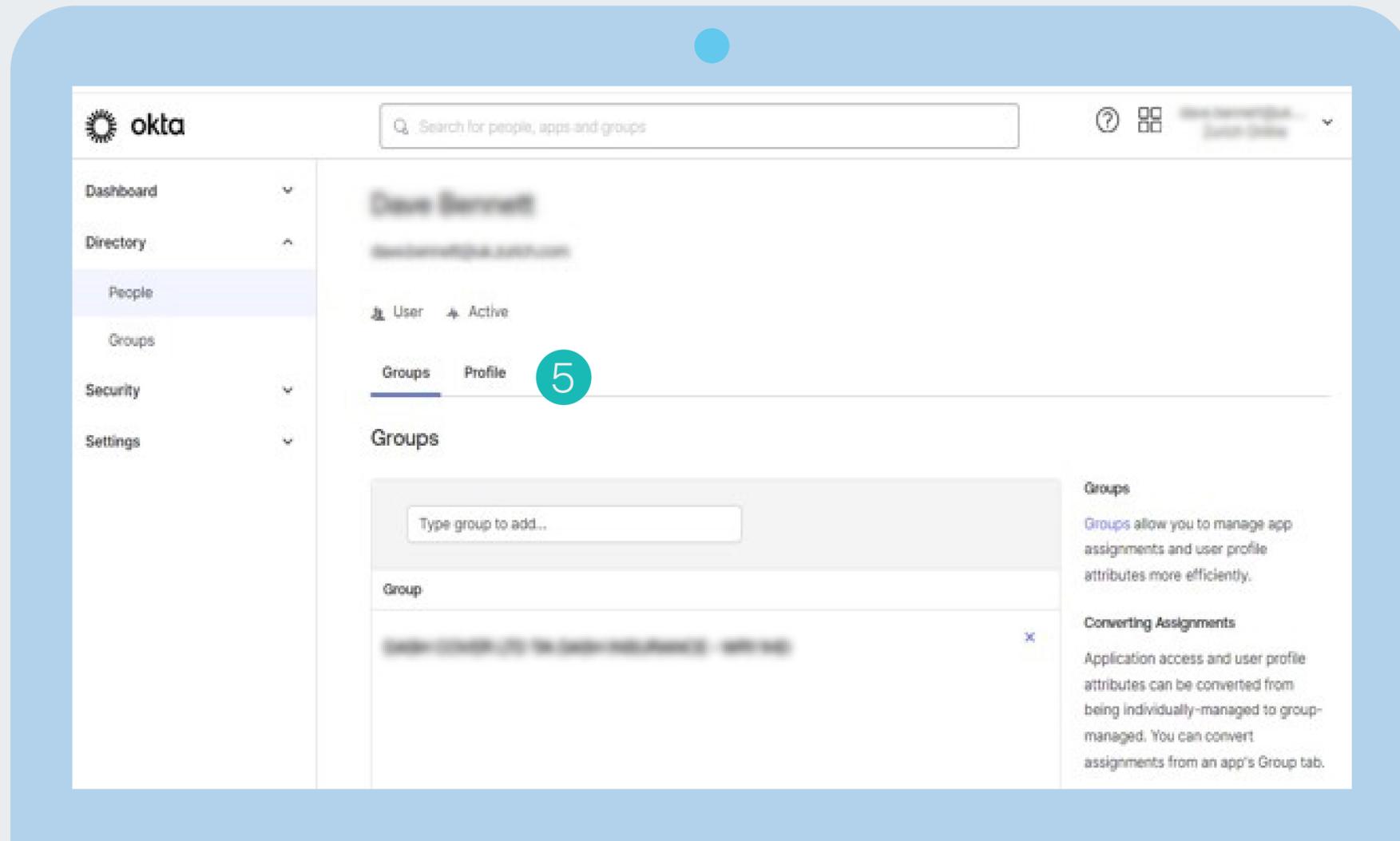
How to edit users



4 Select User you want to edit by clicking on their name.



How to edit users



5 Select **“Profile”**.



How to edit users

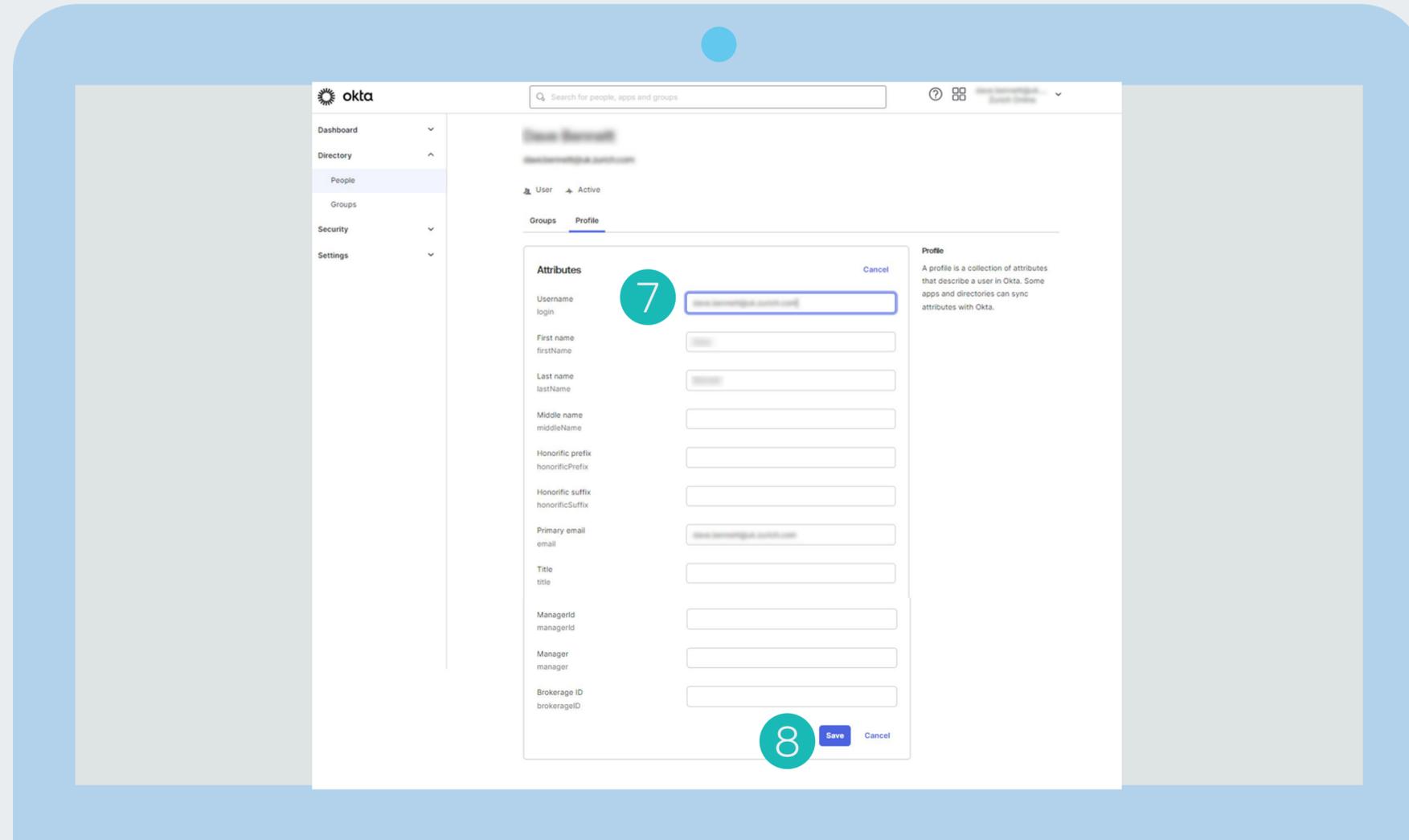


The screenshot shows the Okta user management interface. On the left is a navigation menu with options: Dashboard, Directory, People (selected), Groups, Security, and Settings. The main content area displays the profile for a user named 'John Doe' with email 'john.doe@okta.com'. Below the user name, there are tabs for 'Groups' and 'Profile'. The 'Profile' tab is active, showing a list of attributes: Username/login, First name/firstName, Last name/lastName, Middle name/middleName, Honoric prefix/honorificPrefix, and Honoric suffix/honorificSuffix. A red circle with the number '6' highlights the 'Edit' button located at the top right of the attributes list.

6 Click "Edit".



How to edit users



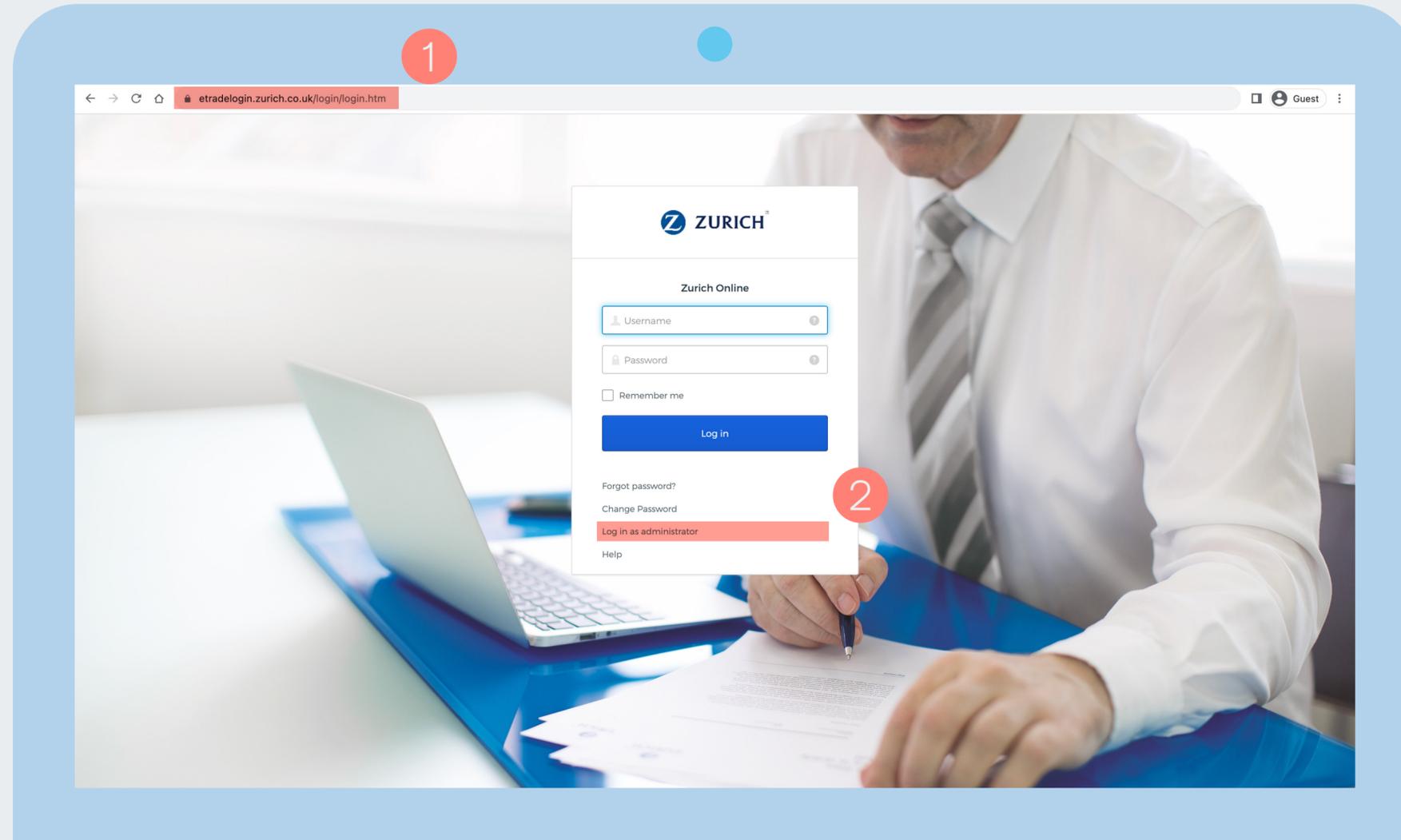
- 7 This then allows access to the various cells that can be edited as required.
- 8 Once changes have been made, simply click “**Save**” at the bottom of the form.

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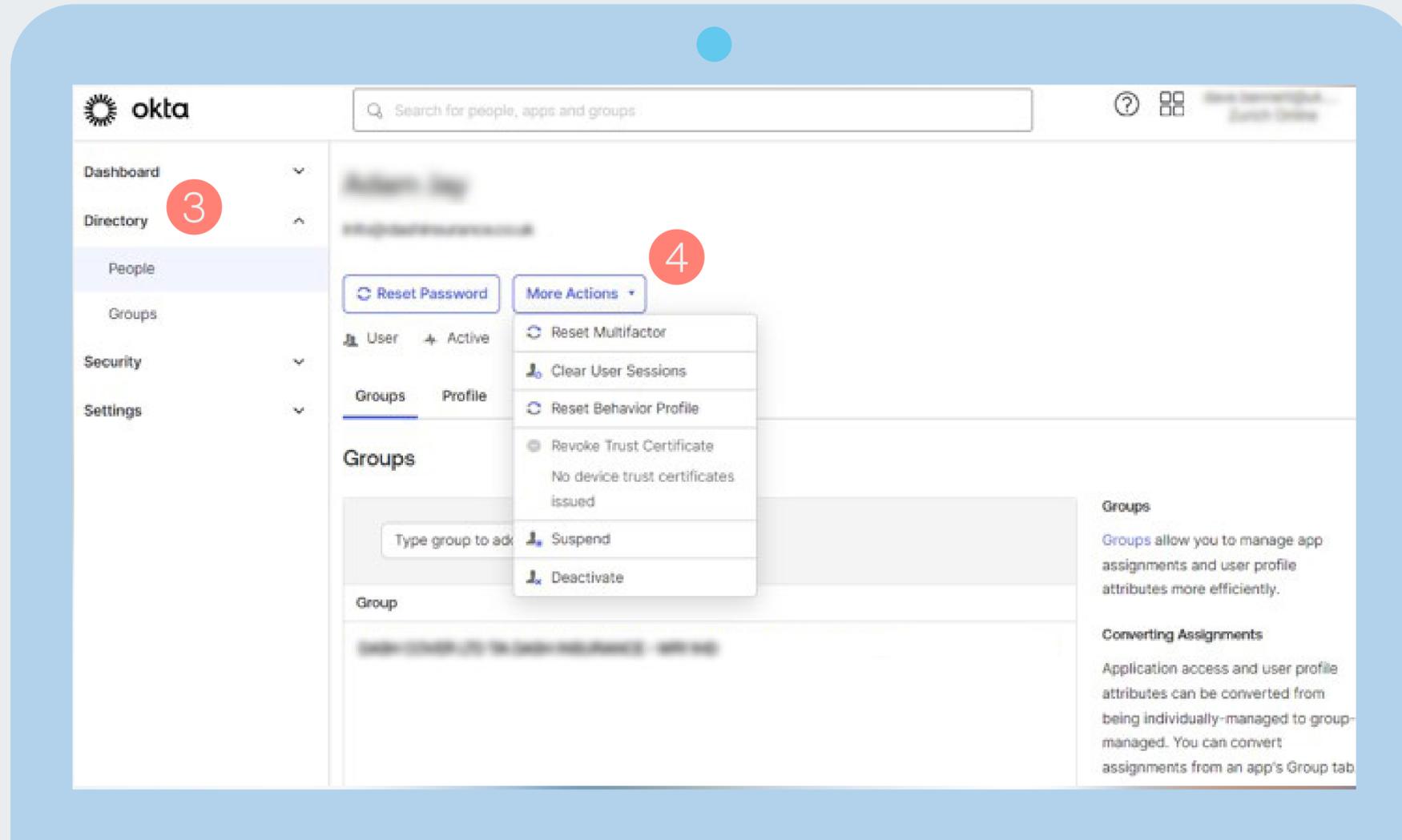
Deactivating a user account



- 1 Open **Zurich Broker Online Log in** on a separate tab.
- 2 Below the blue “**Log in**” bar select “**Log in as administrator**” with your normal log on details.



Deactivating a user account



- 3 Once logged in, select **Directory** from the menu on the left, then **People**.
- 4 Review your users. If any need to be deactivated, you have to click on their name, click “**More actions**” and click “**Deactivate**”.

If the user being deactivated also has Admin rights for the group, please email etrade.support@uk.zurich.com and request that they have their rights deactivated

