

Chubb Risk Engineering Exchange Customer Client Administrator Provisioning of Users (Customer Clients) - User Guide

CHUBB®

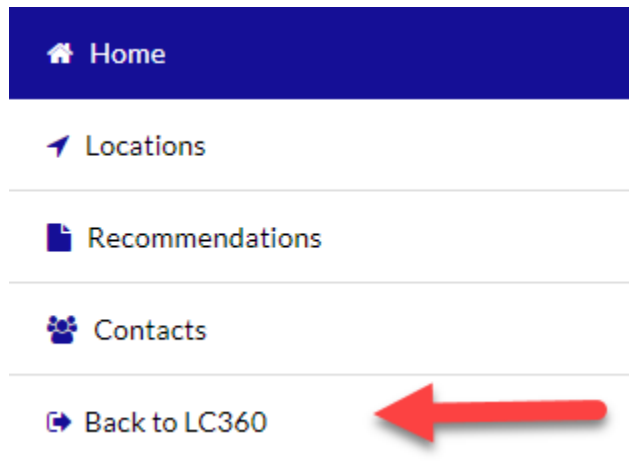
Risk Engineering Services

Chubb Risk Engineering Exchange – Customer Client Administrator User Provisioning

As a **Customer Client Administrator**, you can add and remove internal staff and external vendors (**Customer Clients**) from access to your Chubb Risk Engineering Exchange platform. This is all managed via the Exchange.

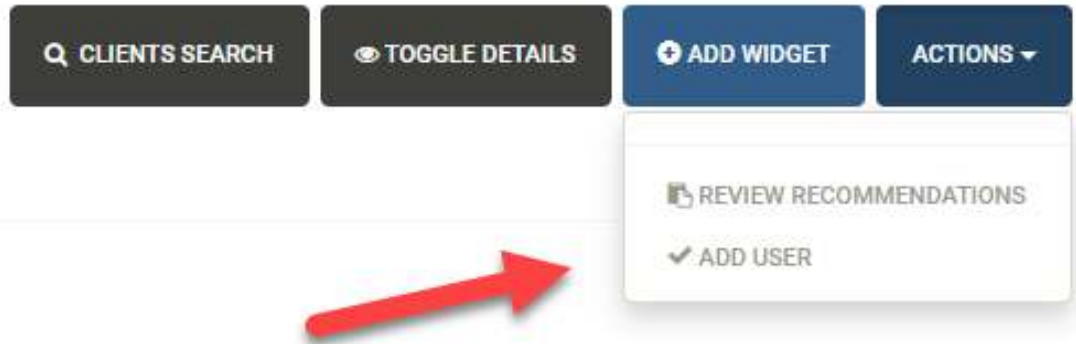
If you wish to add a **Broker** as a Customer Client or Customer Client Administrator, please contact your **Risk Engineering Account Engineer**.

Once you have logged into the Chubb Risk Engineering Exchange at <https://www.chubb.com/riskengineeringexchange>, access the **Administrative Controls** page by selecting **Back to LC360** by clicking this from the left-hand menu:



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You now have access to your **Administrative Controls**. Clicking the **Actions** button exposes the **Add User** button.



Input the **Email Address** of the individual you wish to provision as a **Customer Client** and **Submit**:

PLEASE SUBMIT AN E-MAIL ADDRESS TO CHECK IF THE USER YOU ARE TRYING TO ADD EXISTS IN GETACCESS

E-Mail:

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You will be informed that **Email Address Returned No Users** indicating that you need to **Create a New User**. If you are informed that the **User Already Exists** you will need to go the **User** page as described later in this document, and **Modify** their profile to what you want for their new **Role** or **Location Access**.

PLEASE SUBMIT AN E-MAIL ADDRESS TO CHECK IF THE USER YOU ARE TRYING TO ADD EXISTS IN GETACCESS

E-Mail:


Email address returned no users

Click the "Create New User" button to create a new user in Guidepoint and GetAccess.

If you feel this is in error: In North America - contact the help desk at 1-877-747-5266 and select option #2. Outside of North America - Contact your Chubb Risk Engineer or Account Manager.

To try another e-mail address, re-enter address and hit submit again.

To return to the Client click Cancel




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To create a new user, the only fields needed are:

- a. First Name
- b. Last Name
- c. Country
- d. Time Zone
- e. Default Language

E-mail Address	slindt@netscape.com
First Name	Steve
Last Name	Lindt
Work Phone	
Home Phone	
Cell Phone	
Street 1	
Street 2	
City	
* Country	Australia



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AvailableTimeZones Eastern Standard Time (-05:00:00)

Languages

<input checked="" type="checkbox"/> English	<input checked="" type="radio"/> Is Default
<input type="checkbox"/> Danish	<input type="radio"/> Is Default
<input type="checkbox"/> Portuguese BR	<input type="radio"/> Is Default
<input type="checkbox"/> Spanish	<input type="radio"/> Is Default
<input type="checkbox"/> French	<input type="radio"/> Is Default
<input type="checkbox"/> Dutch	<input type="radio"/> Is Default
<input type="checkbox"/> Portuguese PT	<input type="radio"/> Is Default
<input type="checkbox"/> Italian	<input type="radio"/> Is Default
<input type="checkbox"/> German	<input type="radio"/> Is Default
<input type="checkbox"/> Swedish	<input type="radio"/> Is Default

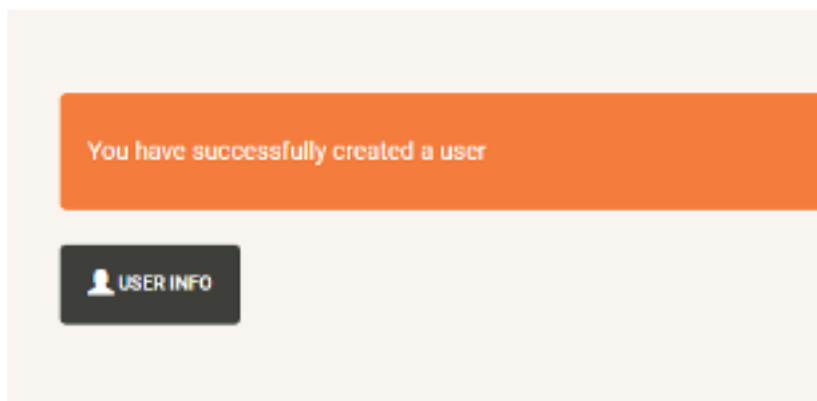
User Roles **Customer Client** Customer Client Admin

Admin: CC Admin Test

Once these items are selected, click **Customer Client** and yourself in the **Admin** box and **Submit**

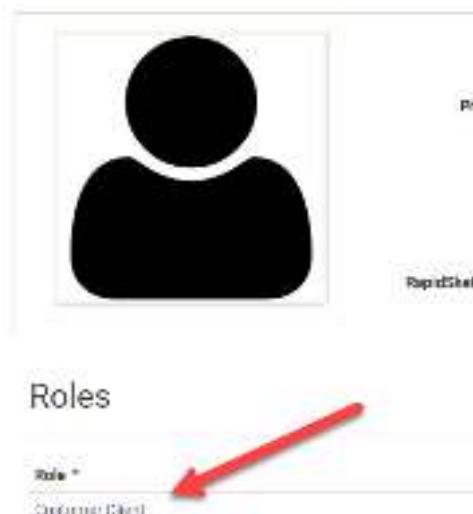
You have now **Successfully Created a User** that will receive an email with a **User ID and Temporary Password** to gain access to the Exchange.

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At this point, unless you want the user to have access to see all locations, you will need to Select **User Info** to **Edit** their permissions and assign **Locations** that they can view by clicking the blue Customer Client link:

Steve Lindt - Details



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Scroll Down to the **Clients and Locations** section, and select **Edit**



You can now select the **Locations** that the user can access. Click **Select Specific Locations** if not already selected

Assigned Clients

MARY JO INC TIME WORKS INCORPORATE FOR TUNE GAMES. HAPPY T...

Select Specific Locations

Click here to search

Selected ^	Name ^	Region 2 ^	Country ^	Postal Code ^
<input type="checkbox"/>	MARY JO INC TIME WORKS INCORPORATE FOR TUNE GAMES	King	US	98028
<input type="checkbox"/>	MARY JO INC TIME WORKS INCORPORATE FOR TUNE GAMES	King	US	98028
<input type="checkbox"/>	New Jersey Warehouse	Middlesex	US	07067
<input type="checkbox"/>	Office Building	Franklin	US	43125

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Click **Users** at the top of the page to return to the main **User Page**. You can then further edit and review by clicking the **Wrench** icon, or the blue **Users Name** to verify the locations you added took effect.



Should you wish to **Delete** a user, this is accomplished by clicking the blue **Users Name** as above to open their profile, and clicking the red **Remove Role** icon.



You may now use the **Back or Forward** arrows to navigate to previous pages, or click any of the other selections at the top of the page to return to the **Chubb Risk Engineering Exchange** or **Log Off**