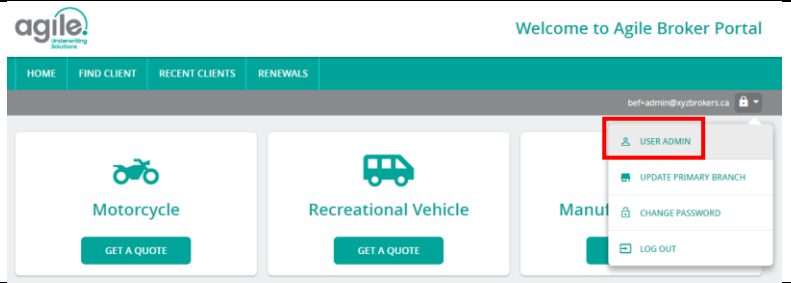
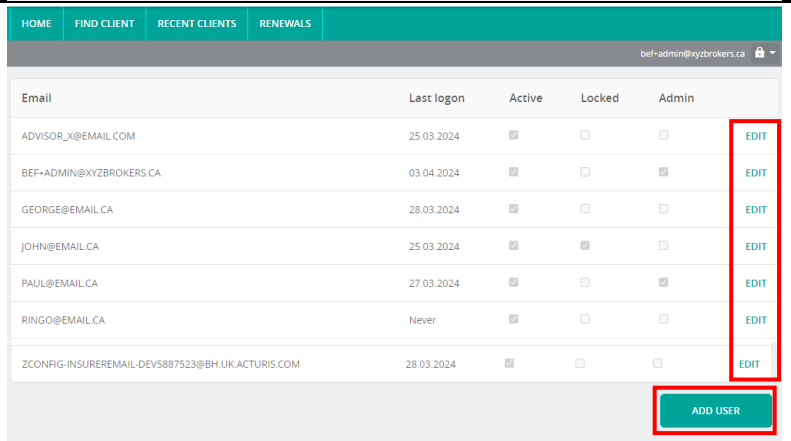
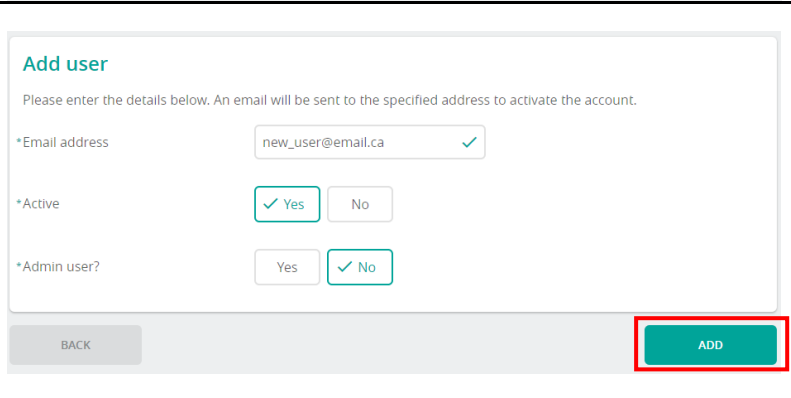


## Using the 'User Admin' function on the Agile Broker Portal

### Purpose:

This tutorial explains how to use the 'User Admin' feature on the new Agile Broker Portal. This is special access that can be granted to a few individuals from each brokerage. From there, they can manage other user accounts within their organization to use the Broker Portal.

<p>1. Log into the Agile Broker Portal, click on the right-upper corner (<i>padlock icon</i>) and click <b>&lt;User admin&gt;</b>.</p>																																																	
<p>2. The existing users and their status will be displayed on this page.</p> <p>3. To update an existing user account, go to <b>step 6</b>.</p> <p>4. To create a new user account, click <b>&lt;Add user&gt;</b>.</p>	 <table border="1"> <thead> <tr> <th>Email</th> <th>Last logon</th> <th>Active</th> <th>Locked</th> <th>Admin</th> <th></th> </tr> </thead> <tbody> <tr> <td>ADVISOR_X@EMAIL.COM</td> <td>25.03.2024</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>BEF-ADMIN@XYZBROKERS.CA</td> <td>03.04.2024</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>GEORGE@EMAIL.CA</td> <td>28.03.2024</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>JOHN@EMAIL.CA</td> <td>25.03.2024</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>PAUL@EMAIL.CA</td> <td>27.03.2024</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>RINGO@EMAIL.CA</td> <td>Never</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EDIT</td> </tr> <tr> <td>ZCONFIG-INSUREREMAIL-DEV5887523@BH.UK.ACTURIS.COM</td> <td>28.03.2024</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>EDIT</td> </tr> </tbody> </table>	Email	Last logon	Active	Locked	Admin		ADVISOR_X@EMAIL.COM	25.03.2024	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EDIT	BEF-ADMIN@XYZBROKERS.CA	03.04.2024	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT	GEORGE@EMAIL.CA	28.03.2024	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EDIT	JOHN@EMAIL.CA	25.03.2024	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT	PAUL@EMAIL.CA	27.03.2024	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT	RINGO@EMAIL.CA	Never	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EDIT	ZCONFIG-INSUREREMAIL-DEV5887523@BH.UK.ACTURIS.COM	28.03.2024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EDIT
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<p>5. Enter the advisor's <b>email address</b> and <b>"Active = Yes"</b>. If this person also needs to have ADMIN access for managing other accounts, check "Admin user = Yes". Then, click <b>&lt;Add&gt;</b>.</p> <p>6. The person will receive an email to complete the sign-up process and log onto the portal.</p>																																																	

7. If you need to **change an existing user account**, locate the corresponding line and click on **<Edit>**.

8. Make the necessary changes and click **<Update>** to save. The parameters are:

**Active:** Determines if the account is enabled. Marking “No” will completely remove the access and can only be reactivated by an admin.

**Locked:** Marking “Yes” forces the user to go through the account validation steps and resets the password.

**Admin user:** Allows access to manage other user accounts within the organization.

The screenshot shows a web interface for updating a user. The title is "Update user". There are four rows of form elements:

- \*Email address: A text input field containing "RINGO@EMAIL.CA".
- \*Active: Two radio buttons, "Yes" (checked) and "No".
- \*Locked: Two radio buttons, "No" (checked) and "Yes".
- \*Admin user?: Two radio buttons, "Yes" and "No" (checked).

At the bottom of the form, there are two buttons: "BACK" (disabled) and "UPDATE" (active, highlighted with a red box).