

Welcome to Grange

User Access Guide



Grange Systems User Access Guide



Overview

This guide provides instructions for Grange User Access or access into Grange's GrangeAgent system, GrangeAgent.com®. It provides information to help Agency Principals and their designated Access Administrators manage their agency employees' secure access to GrangeAgent.com. It also provides instructions for all GrangeAgent.com users to change their secure password and reset their security answers for the Web site. You can also call tech support for assistance at 1-800-422-0550 .

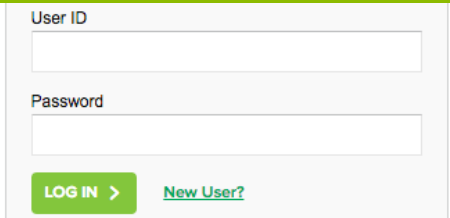
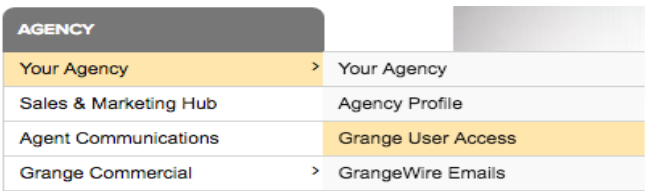

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Getting Started and the Definition of Roles

Follow these steps to get started in the Grange User Access Center:

Step	Action	
1	Go to www.grangeagent.com	
2	Type your User ID and Password then click LOG IN .	
3	Select Your Agency then Grange User Access under the lower left Agency menu.	
4	Click User Access .	

Roles within GrangeAgent

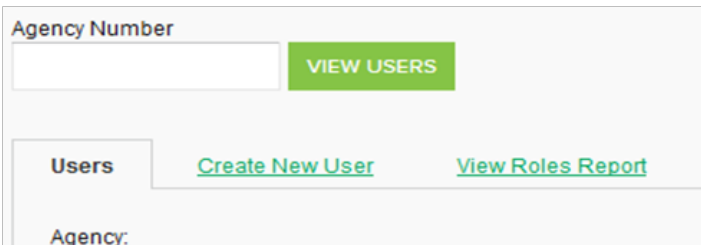
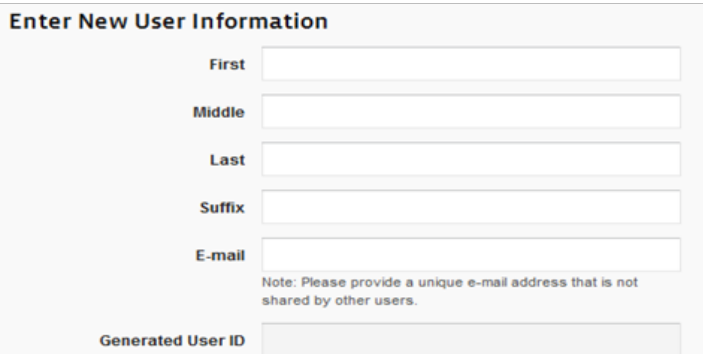
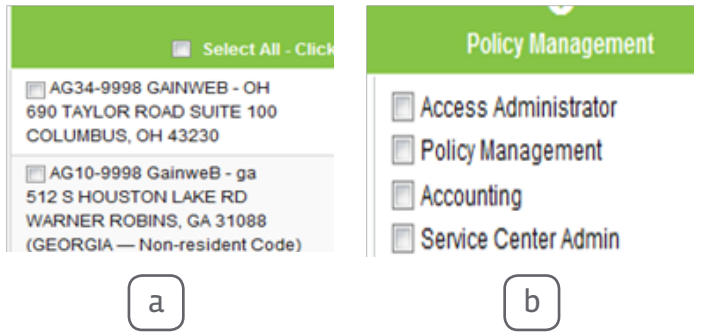
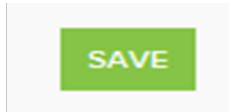
Once in GrangeAgent and the User Access Center, you will have access to different functionality dependant on your role.

Role	Description
Agency Principal	<p>Agency Principals have oversight of all Agency Access to Grange systems.</p> <p>Principals will be notified when an Administrator's role has changed or when an agency code is edited. The Principal also assigns the Accounting Role.</p>
Access Administrator	The Access Administrators manage an agency's user access to GrangeAgent.com. Access Administrators can create new users, reset passwords and disable users' access. They can also make changes to the agency's address, email, and contact information
Accounting	Accounting users can view their agency's commission statements. <i>Only an Agency Principal can assign Accounting permissions.</i>
Policy Management	Users assigned to the Policy Management role can access all sections of GrangeAgent.com and GAINWeb® except for commission statements. <i>All users are automatically assigned to the Policy Management</i>

Create User Accounts

This will guide you through creating a new user account. *Only those assigned the Agency Principal or Access Administrator roles can create new user accounts.*

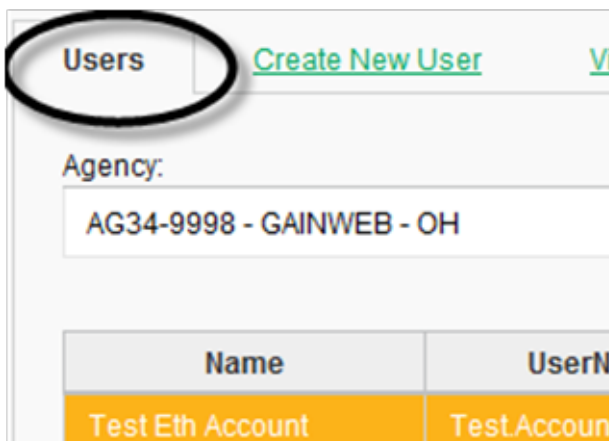

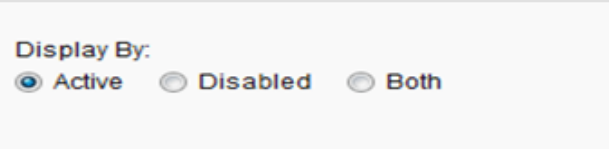
Create a New User Account

Step	Action	Visual
1	Click the Create New User tab on the Grange User Access Center main page.	
2	Enter the user's First and Last name and E-mail address.	
3	Assign the user's permissions for each agency: a) Select the box beside each agency code (agXX-XXXX) for which the user should have access . b) Select the role (or level of access) that each user should have for each agency.	
4	Click SAVE to save your entry. The user will then receive an email with a link to confirm the creation of the account. The verification link in the email is valid for 24 hours.	

View and Edit User Accounts

Agency Principals and Administrators can view all the users for their agencies, update user information, reset user passwords and disable user access at any time. This will guide you through how to view and edit access.

Viewing and Editing User Accounts

Step	Action	Visual
1	Click the Users tab on the Grange User Access Center main page.	
2	Click the Agency drop-down menu if you have multiple agencies and you want to view users in another agency code.	
3	Select Active, Disabled, or Both option to change the user view.	
4	From the list you have several options:	
	Edit User	Allows you to update the user's name, e-mail address or role(s). Note: updating the user's name does not change the User ID.
	Reset Password	Allows you to automatically send a verification email to the user to reset the password. <i>Please note that when you click the link for a user without an e-mail address, you'll be prompted to enter an email address for the user.</i>
	Disable User Access	Allows you to disable the user's access for 90 days. After 90 days, the user's account will be terminated. For users whose access has been disabled, if the Agency Principal or Access Administrator selects the Enable link beside the user's name within 90 days, the user's access will be restored.
Note Each time a user's account is created or updated, the Agency Principal and any designated Access Administrator will receive a GrangeAgent.com User Activity Notice via e-mail.		

View User Role Reports and Principal Email Notifications

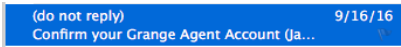
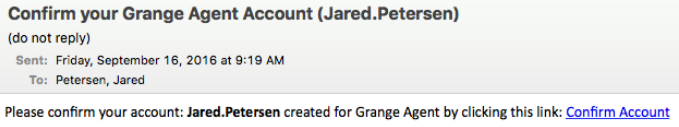
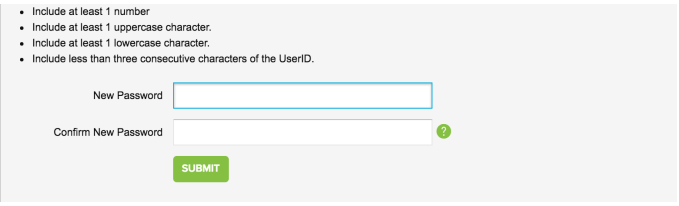
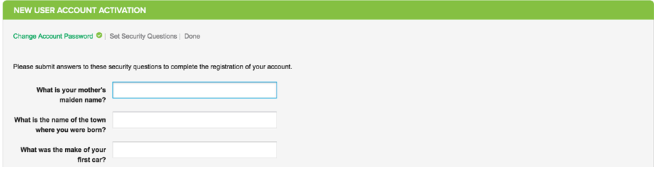
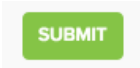
This will guide you through viewing user role reports from the Grange User Access area of GrangeAgent.com. Only those assigned the Agency Principal or Access Administrator roles can view user role reports.

View User Role Reports

Step	Action	Visual
1	Click the View Roles Report tab.	
2	Select the agency you want to view from the Agency drop-down menu if multiple agencies are associated with the account.	
3	Select “By Agency” or “By User” to change the roles report view.	
4	The list of users will display along with their assigned access for you to review.	

Activate your Account

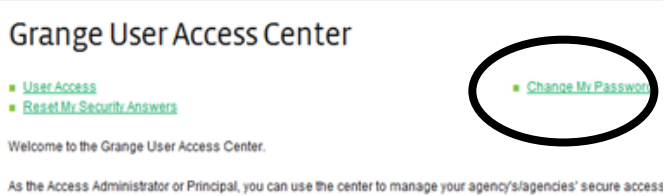
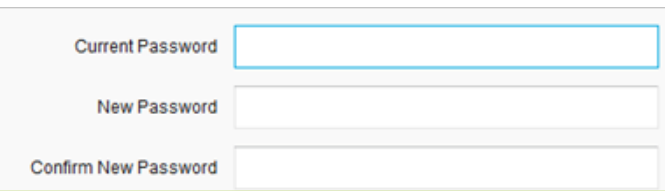
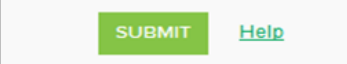
For a new user to activate an account follow the steps below. All user roles can activate their own accounts:

Step	Action	Visual
1	Access the GrangeAgent confirmation email.	
2	Click the Confirm Account link in the email. Note: This link expires after 24 hours.	
3	Enter and confirm a New Password .	
4	Answer the security questions.	
5	Click SUBMIT to complete the process.	
6	Review the email confirmation	Review the GrangeAgent.com Account Notification e-mails notifying you that your password and your security answers have been changed.

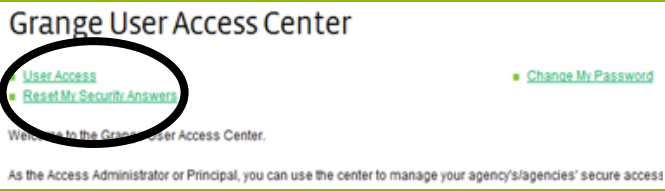
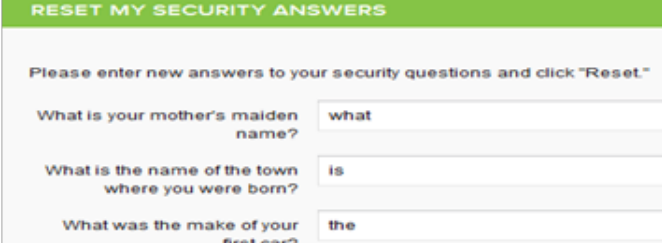

Change your password and Reset your Security Answers

All user roles can change their password and security answers. To change your password:

Change your password

Step	Action	Visual
1	Click on the Change My Password link in the Grange User Access Center	 <p>Grange User Access Center</p> <ul style="list-style-type: none"> User Access Reset My Security Answers Change My Password <p>Welcome to the Grange User Access Center.</p> <p>As the Access Administrator or Principal, you can use the center to manage your agency's/agencies' secure access</p>
2	Complete the fields on the Change My Password screen	 <p>Current Password <input type="password"/></p> <p>New Password <input type="password"/></p> <p>Confirm New Password <input type="password"/></p>
3	Click submit	 <p>SUBMIT Help</p>
4	Review the email confirmation	Review the GrangeAgent.com Account Notification e-mails notifying you that your password has been changed. You can now log on to GrangeAgent.com with your User ID and new password.

Reset your security and answers

Step	Action	Visual
1	Click on the Reset my Security Answers link in the Grange User Access Center	 <p>Grange User Access Center</p> <ul style="list-style-type: none"> User Access Reset My Security Answers Change My Password <p>Welcome to the Grange User Access Center.</p> <p>As the Access Administrator or Principal, you can use the center to manage your agency's/agencies' secure access</p>
2	Complete the fields on the Reset my Security Answers screen	 <p>RESET MY SECURITY ANSWERS</p> <p>Please enter new answers to your security questions and click "Reset."</p> <p>What is your mother's maiden name? <input type="text" value="what"/></p> <p>What is the name of the town where you were born? <input type="text" value="is"/></p> <p>What was the make of your first car? <input type="text" value="the"/></p>
3	Click submit	 <p>SUBMIT Help</p>
4	Review the email confirmation	Review the GrangeAgent.com Account Notification e-mail to confirm that your security answers have been changed.

Frequently Asked Questions

Question	Try
I added a new user and he/she is unable to log on GrangeAgent.com. What can I do?	<ul style="list-style-type: none"> • Verify that the user has clicked the Confirm Account link from the confirmation email. Click the Resend New Account link if it has been more than 24 hours and the user has not confirmed the account. • Verify that the user information is correct on the Grange User Access Center on the user information screen; click the user's Edit User link on the Users tab if it needs to be updated.
I disabled a user's access, but he/she still has access to log in. What should I do?	<ul style="list-style-type: none"> • If you have multiple agencies, a user's access can be disabled for one, some or all agencies so confirm that the user is no longer assigned to any roles for any agencies. • Use the Edit User link on the Users tab to review the roles assigned to that user by agency code and remove access to any additional agencies if he/she still has it. • You can also select the Disabled radio button next to "Display By" on the Users tab to confirm that the user access has been disabled. • If he/she still has access to GrangeAgent.com, please contact Technical Support at (800) 422-0550 for assistance.
One of my non-resident agencies is not included in the list of agencies under "Assign User Permissions" on the Create New User tab. Who should I contact?	Please contact Technical Support at (800) 422-0550 for assistance.
I logged on GrangeAgent.com and selected my non-resident agency code, but when I access GAINWeb®, it defaults back to my primary code. What should I do?	<p>You can change the agency code by selecting the agency code you want from the drop-down list in the upper right corner of GAINWeb®</p>
I am an Agency Principal and will be on vacation for several weeks. I would like to give temporary access to another user so he or she can access commission statements.	<ul style="list-style-type: none"> • To allow another user to access and view your agency's reports, you can assign the Accounting role to any user. Simply click the user's Edit User link on the Users tab and select the box beside the Accounting role. • When this role is assigned, the user will be able to access commission statements under Your Agency – Reports on GrangeAgent.com. • If you have more than one agency, the Accounting role box needs to be checked for each agency that the user should have access to commission statements.

Frequently Asked Questions (continued)

Question	Try
I'm an administrator and set up a user and they didn't receive a confirmation email. What should I do?	<ul style="list-style-type: none">• Verify that the user information, including the email address, is correct on the Grange User Access Center. Click the user's Edit User link on the Users tab if it needs to be updated.• Click the Resend New Account link and the user will receive a new confirmation email that is valid for 24 hours.
I've tried to log in to GrangeAgent.com and can't remember my password. What should I do?	<ul style="list-style-type: none">• On the GrangeAgent.com Login screen, click Forgot Password. Follow the prompts and answer the security settings to reset. After you successfully answer the security questions, a confirmation email will be sent to your registered e-mail address and you can click the link to reset your password.