Arbitration Forums, Inc.
Membership driven. Innovation focused.

Member Management Guide for Security Administrators

December 2022

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I. Introduction

About Arbitration Forums, Inc. (AF)'s Member Management Guide

This Member Management Guide was developed to help you manage business units and users, and specify company preferences related to your company's participation in AF's programs. It contains information on how to establish and maintain business units, and add and edit individual user accounts.

The topics below can help you get started using the guide quickly. In just a few minutes, you will have an understanding of each topic. Click a topic below to learn more!

Business Units and Users Overview

Add Business Unit

Add User

II. Getting Started

The following subsections outline the one-time security administration setup functions, as well as the ongoing maintenance that will be performed by the security administrator.

Initial (One-Time) Setup Functions

The following steps represent the initial actions taken by both the participating company and AF to establish a security administrator. These represent steps that occur once during the initial setup of a company within AF's online system.

1. **Designate Security Administrator** – An authorized person, often the same person authorized by a company to sign the arbitration agreement, designates someone to serve as the company's security administrator. Multiple security administrators may be designated by the company. Each will need to be aware of and understand his or her role and responsibilities.
2. **Complete and Submit the Security Administrator Profile Form** – The security administrator(s) must complete a Security Administrator Profile Form and return it to AF for processing. This form captures the basic information AF needs to create the security administrator account.
3. **Create Security Administrator Account** – AF creates the security administrator account(s) and sends an email to the security administrator(s) that contains a link the security administrator will use to access AF's website and establish a password.
4. **Create Business Units, Users, and other Security Administrators** – For companies new to AF's website, the security administrator begins the setup process by creating

business units to which individual user accounts will be assigned at the time they are created. Business units are discussed in detail in the Business Unit section of this guide. The security administrator can also designate other security administrators for the company, if needed. Each security administrator can add and modify all business units and users.

Ongoing Maintenance Functions

The following steps represent the ongoing maintenance functions that will be handled by the security administrator. These represent recurring activities that could occur with some regularity depending on the company.

Security administrator maintenance functions include:

- **Creating Business Units** – The initial business unit will be created by AF at the time the initial security administrator account is created. All business units created after that point will be created by the security administrator(s). For more information on business units, see Business Units and Users Overview.
- **Modifying and Maintaining Business Units** – Updates to any Business Unit will be made by the security administrator(s). In the case of a large company with numerous business units, it is recommended that the business unit contact be the security administrator. For more information on modifying business units, see Edit Business Unit.
- **Creating User Accounts** – The addition of new users will be the responsibility of the security administrator(s). For more information on creating a user, see Add User.
- **Assigning and Maintaining Individual and Group Privileges** – Privileges may need to be changed over time based on the activity of the user or company. The security administrator(s) will make any privilege updates that may be needed. For more information on privileges, see Individual and Group Privileges.
- **Creating and Maintaining Users on Integrated Login (if applicable)** – If integrated login is used, the security administrator will maintain the user-related logins that occur on the company side.
- **Administering User Password Modification Process** – The security administrator(s) will be the primary contact for users who have password-related difficulties. For more information on password administration, see Modify User Password.
- **Inactivating Users** – Maintaining user accounts is an important security responsibility of the security administrator(s). When a user should no longer have access to AF's website, the security administrator(s) must make that account inactive to prevent unauthorized use/access. For more information on inactivating a user, see Edit User.

Business Units and Users Overview

On AF’s website, the concepts of business units and users are linked because every user must belong to a business unit.

- A **business unit** is simply a group of users who share the need to access specific areas within AF’s website or who have some other similarities that allow them to be grouped together.
- A **user** is an individual who has an account that allows him or her to gain access to a secure computer system and particular resources within that system.

Typically, the security administrator creates the user account that consists of information about the user, such as login and access privileges. The access privileges define what a user can do on AF’s website.

Business Units

Participating companies are diverse in size and organizational structure. As such, AF’s website security model is designed to meet a wide variety of needs. The security model provides a framework for organizing your users into business units and, as such, at least one business unit must exist for each company.

Multiple Business Units Example

Large companies may choose to organize their offices by region and locality. For example, ABC Mutual has four regional offices in the United States. Each office is responsible for claims within its region. Based on the number of individual user accounts the company will need to establish, the security administrator could create four business units and designate a security administrator for each who will manage the individual user accounts within that business unit.

Single Business Unit Example

Smaller companies, or those with centralized operations and/or a low number of individual user accounts, may opt to use the initial business unit created by AF and add/manage all user accounts within this sole business unit.

These represent only two examples of how a company might divide the administration of its users into business units. The number of security administrators and business units will vary depending upon the company’s needs, and how the company chooses to configure its user accounts is within its discretion.

User Accounts

There are two categories of user accounts and each has specific privileges associated with it:

- **Administrator** – Administrators may add and modify business units and users for his or her company. Administrators can control business units and users for the entire company, regardless of the business unit to which they're assigned. Administrators can also select and generate reports related to their company's participation in AF's programs.

- **User** – Users may work with E-Subro Hub demands and/or arbitration cases, as well as edit some of his or her own account profile information (e.g., his or her name and email address).

Note: Security administrators at member companies should not give third-party administrator (TPA) users a login under the member company. TPAs need to have a TPA consent letter from the member company sent to membership@arbfile.org. Once the consent letter is received, AF's Membership team will grant the TPA access to the system and/or set up a security administrator at the TPA to manage its users.

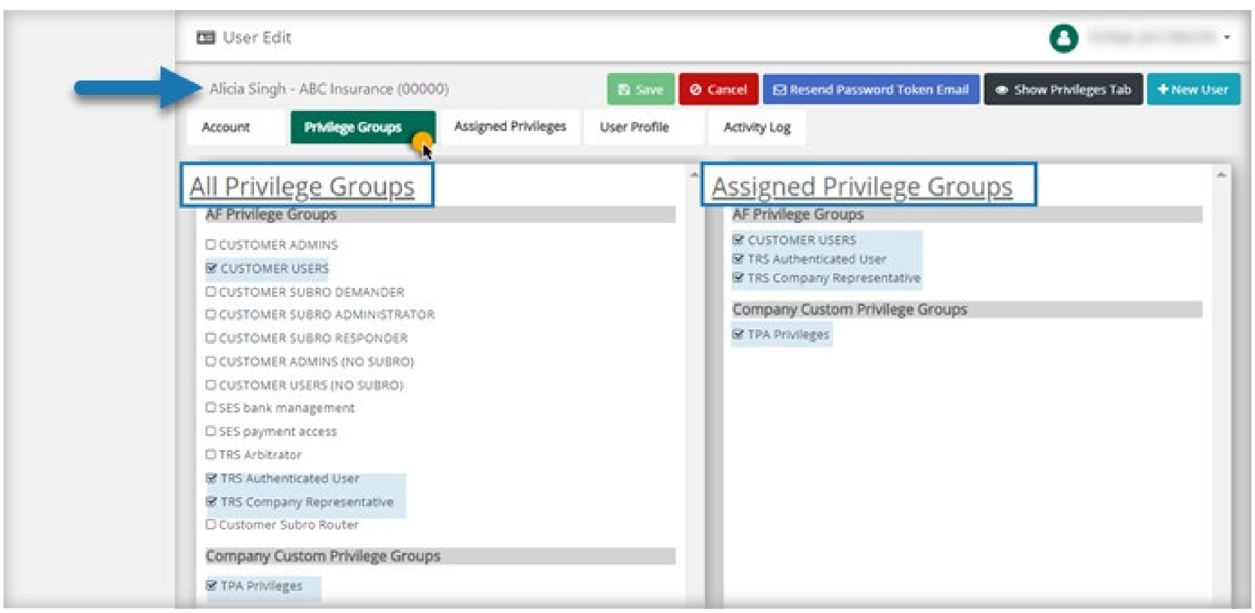
Privilege Groups

AF's website provides a method to easily assign the most common sets of privileges.

The assignment of privileges on a group eases the long-term administrative burden associated with maintaining a user. AF provides several pre-defined groups that contain the privileges most commonly used together.

Group privileges are assigned by choosing the desired group and making the assignment.

For more information on assigning privileges, see Add User.



III. Business Unit Maintenance

Business unit and user maintenance may only be completed after logging into AF's website. The following procedures are based on the security administrator being logged in.

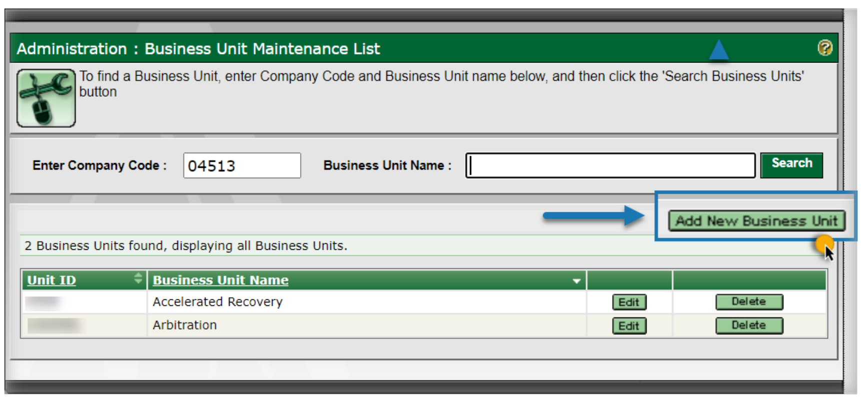
Add Business Unit

AF creates the initial default business unit at the time the initial security administrator account is created.

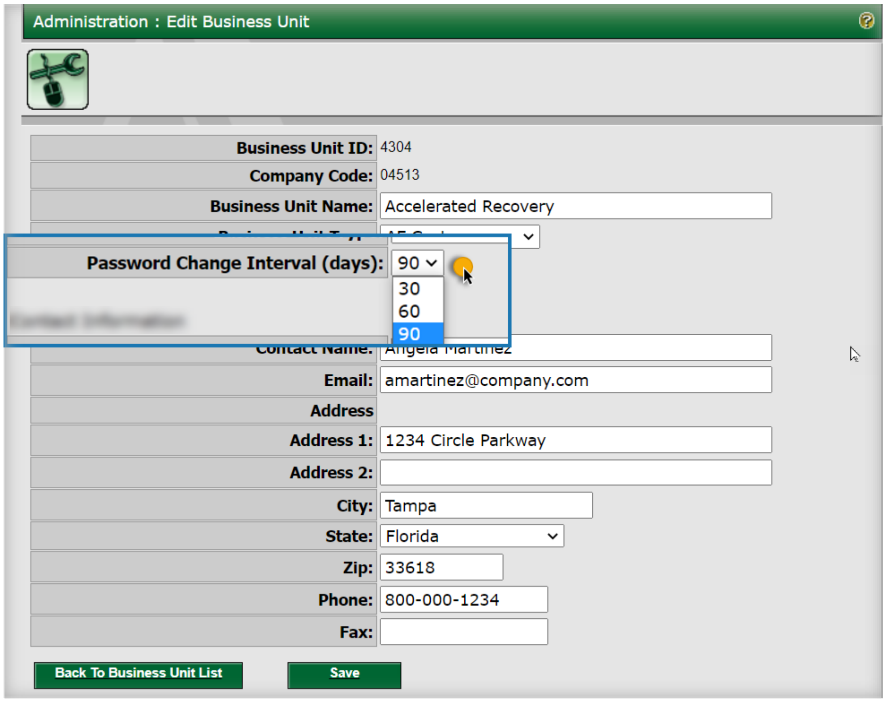
To add a business unit:

1. Select **Administration** > **Business Unit Maint.**

2. Click **Add New Business Unit** to go to the Add Business Unit screen.
   Note: To avoid duplication of business units, AF recommends searching the list of available business units before creating a new one.



3. Enter the requested information in the appropriate fields and select **Save**.
   Note: AF recommends that the contact information for the business unit be the security administrator assigned to that unit. This provides AF with direction for use in supporting the end user. In addition, Password Change Interval options of 30, 60, and 90 days are available to allow companies to adhere to their own password security policy if less than AF's maximum of 90 days.



4. Click **Back to Business Unit List**.

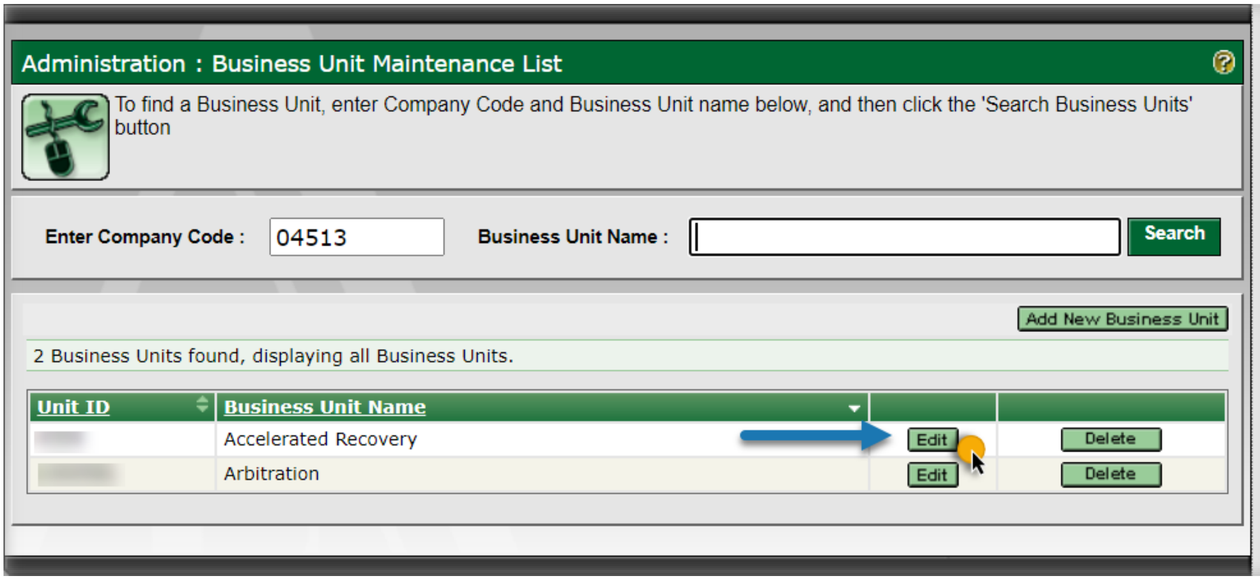
To add additional business units, simply repeat the steps above to add as many business units as needed.

Edit Business Unit

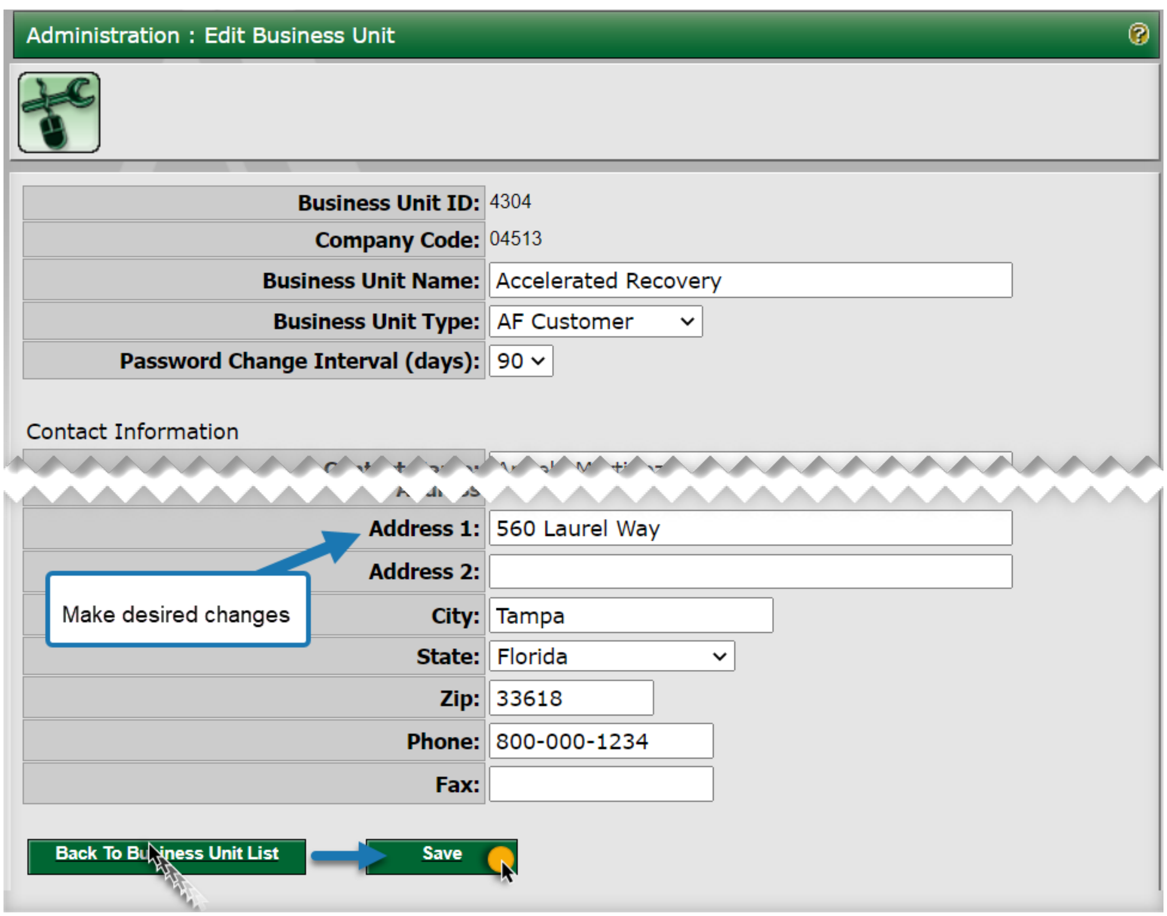
To edit a business unit:

1. Select **Administration** > **Business Unit Maint**.

2. Select **Edit** located on the row associated with the desired business unit.



3. Make any desired changes and click **Save**.



4. Click **Back to Business Unit List**.

IV. Member Management

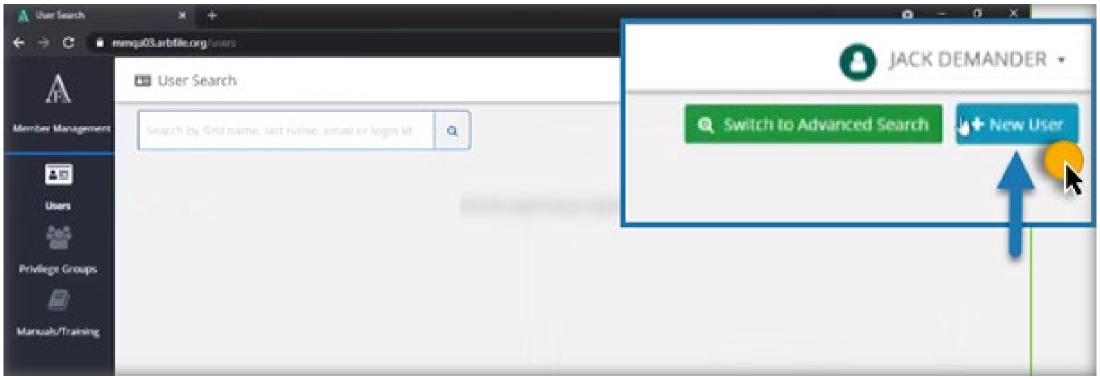
Add User

To create a user:

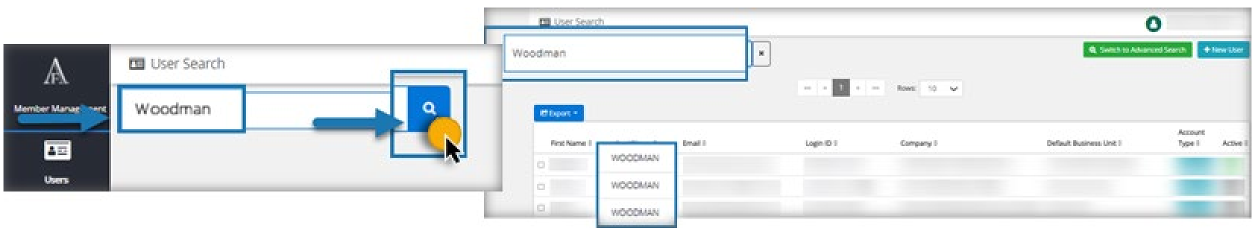
1. Select **Administration** > **New Member Management**.

2. Select **Users**, which can be found on the left side of the page.

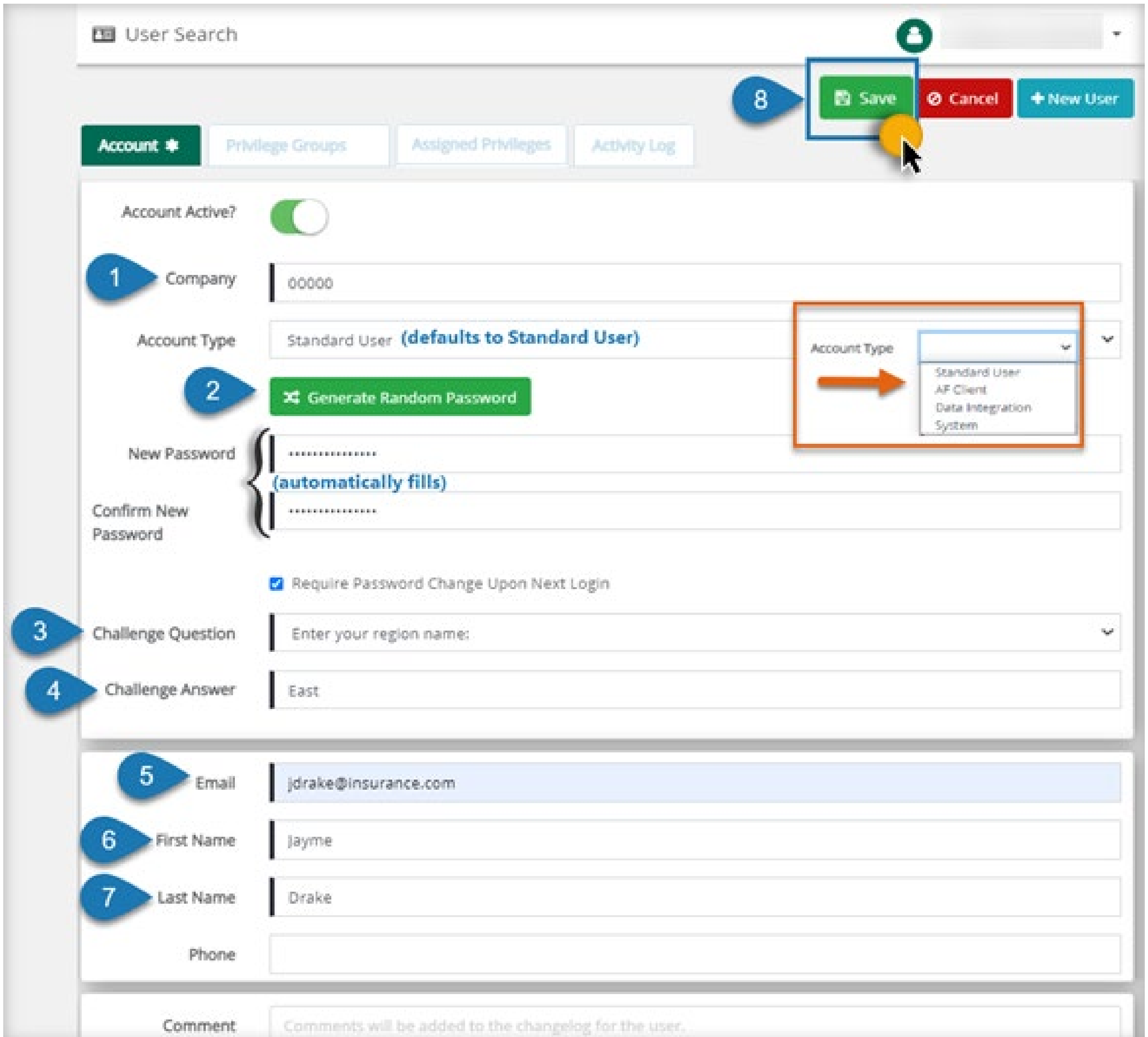
3. Select **New User**.



Note: To avoid duplication of users*, AF recommends searching for the user by entering the last name prior to creating a new user, as shown below.*



4. Add the required information, including a password, (use password generator or enter a temporary password for the user) and click **Save**.

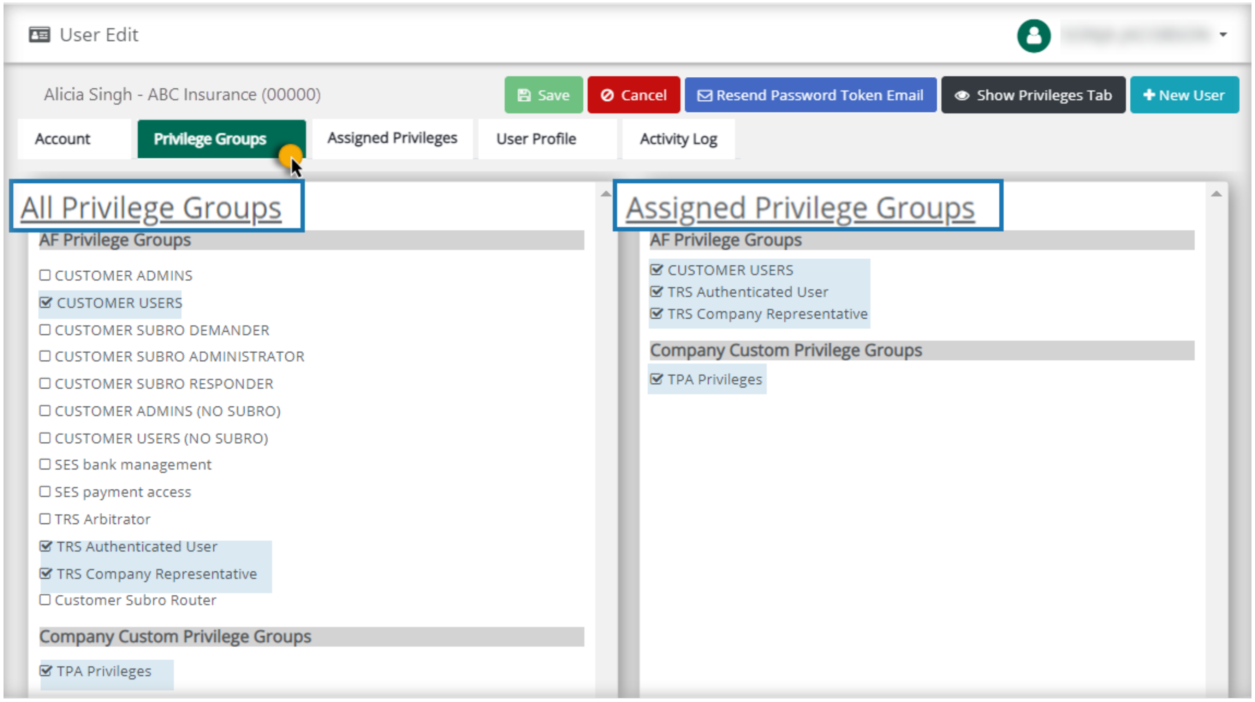


The following is a brief explanation of the **User Info** fields:

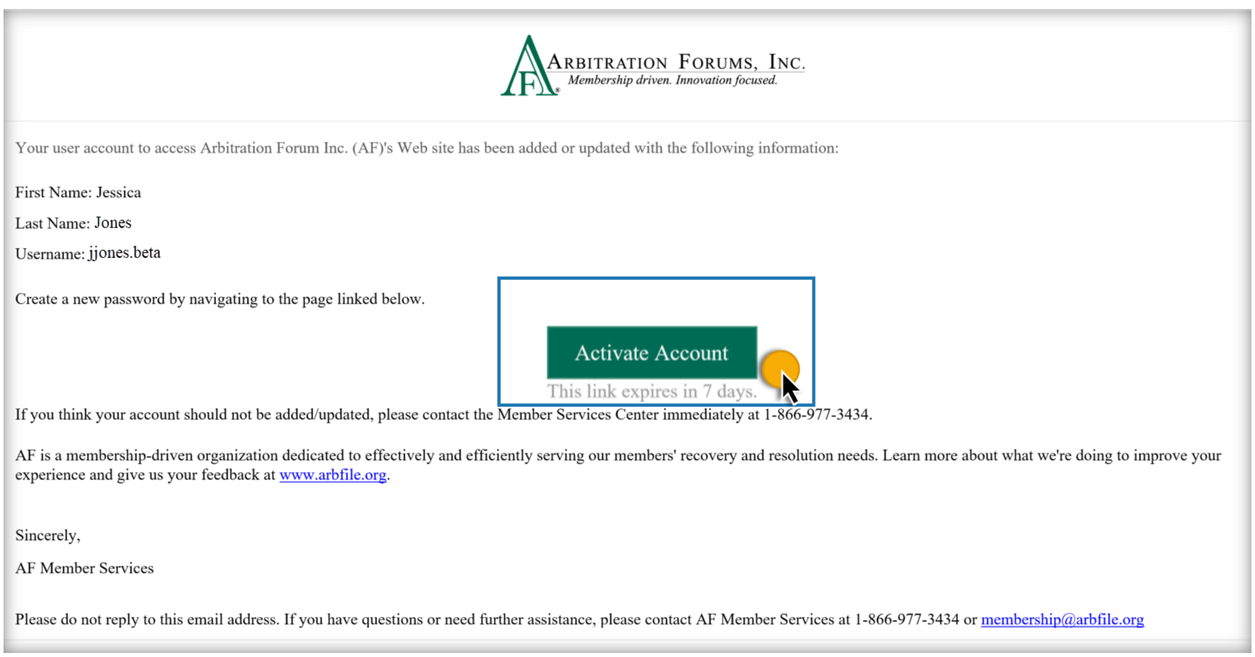
Steps	Field Name	Description
1	Business Unit	From the drop-down menu, select the desired business unit to which the new user should be added.

2	Login ID	Enter a name that will enable AF's website to identify and address the individual for whom the ID is being created. If a duplicate ID is entered, the system will reset it. AF recommends using the individual's company network ID (the name he/she used in your company's email) along with your AF company code, separated by a period. For example, user.88881. Using this naming convention will avoid a login ID conflict with a person working for another company with the same name.
3 & 4	New Password and Confirm Password	The AF system will send each user an email containing his or her login ID and a link to create a password when you select **Yes** in the "send email confirmation" field. **Note:** You must select the button so the user receives an email to create a password. Passwords must be at least eight characters long with uppercase and lowercase letters. Once a password is entered, confirm it by entering it again under "Confirm Password." The system will default to "Require Password Change Upon Next Login."
5	Challenge Question	Select a question from the drop-down box. AF's website will ask the user one of the selected questions to generate a new password if the user loses or forgets his or her original password. As a security administrator, you can coordinate this question and answer with the user or pick one of the general questions (e.g., what is your company code?). After the administrator enters a user, the user can change his or her name, password, and the challenge question and answer.
6	Challenge Answer	Enter the answer to the challenge question in this field. AF's website will compare the answer given by the user to the answer entered here. It is important for the user to remember this answer.
7	Email	Enter the user's company email address.
8	First Name	Enter the user's first name.
9	Last Name	Enter the user's last name.

5. The next step is the assignment of privileges. Privileges are assigned from the **Privilege Groups** tab. Select the box next to the desired item, and the privilege group automatically moves from the **All Privilege Groups** column to the **Assigned Privileges** column.



Notes [1 of 2]: An email will be sent to the new user to activate the account and create their password.



ARBITRATION FORUMS, INC.
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Your user account to access Arbitration Forum Inc. (AF)'s Web site has been added or updated with the following information:

First Name: Jessica

Last Name: Jones

Username: jjones.beta

Create a new password by navigating to the page linked below.

Activate Account

This link expires in 7 days.

If you think your account should not be added/updated, please contact the Member Services Center immediately at 1-866-977-3434.

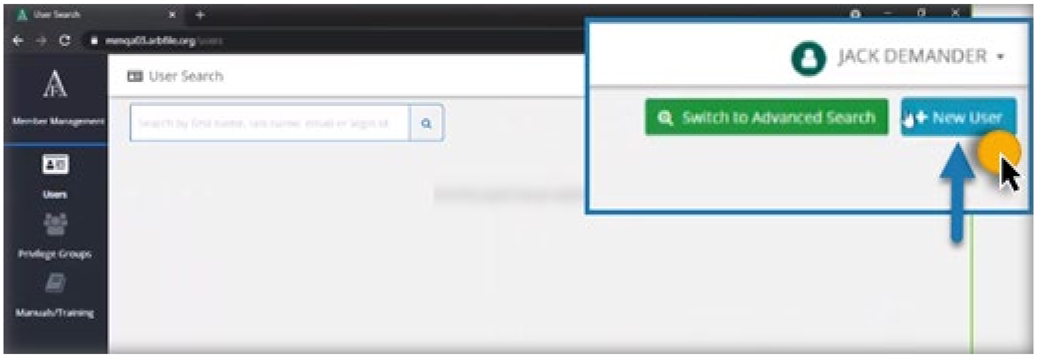
AF is a membership-driven organization dedicated to effectively and efficiently serving our members' recovery and resolution needs. Learn more about what we're doing to improve your experience and give us your feedback at www.arbfile.org.

Sincerely,

AF Member Services

Please do not reply to this email address. If you have questions or need further assistance, please contact AF Member Services at 1-866-977-3434 or membership@arbfile.org

Notes [2 of 2]: To add additional users, select **New User** and follow the steps provided above.



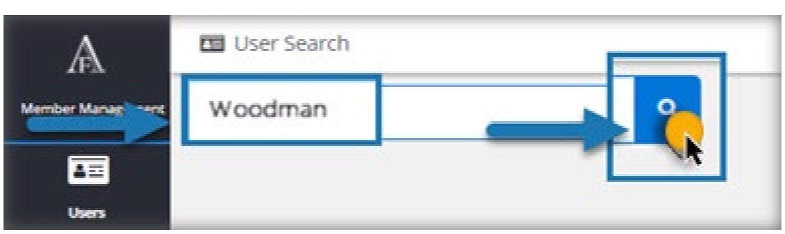
Assign User Business Units

To assign additional business units to an existing user:

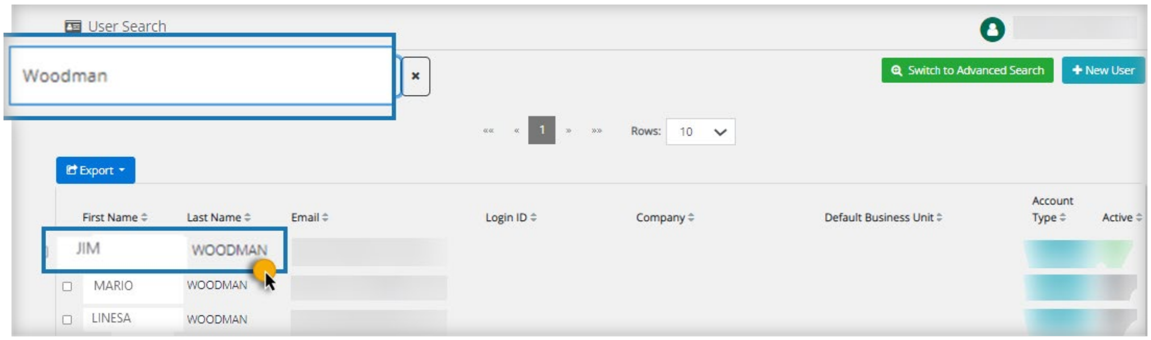
1. Select **Administration** > **New Member Management**.

2. Select **Users** from the main page.

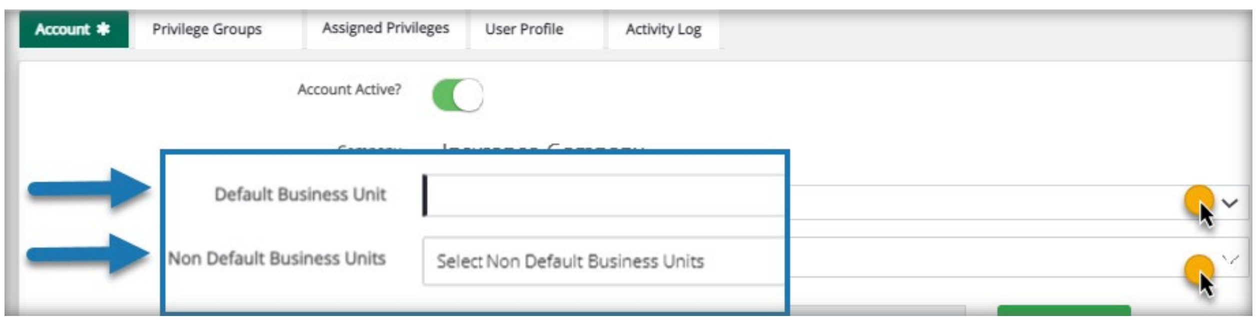
3. Enter user's last name in the search field.



4. Choose the specific user by clicking on the name.



5. Use the drop-down menu under **Default Business Unit** and **Non Default Business Units** to select additional business units specific to the user.



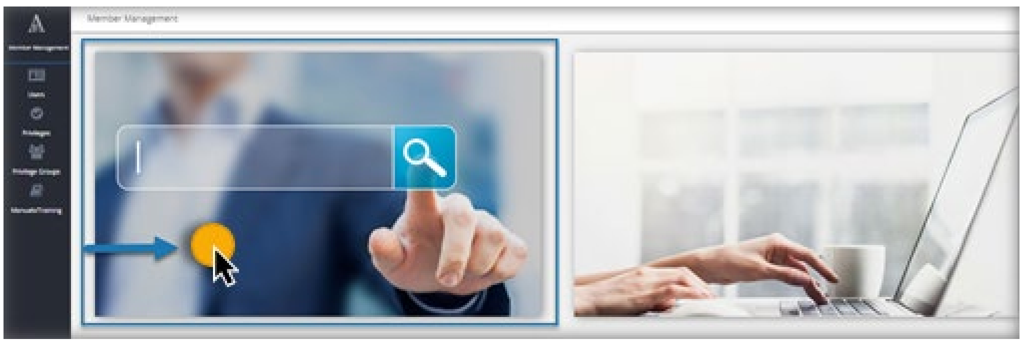
Assign User Privileges

The next step is the assignment of privileges, which can be done on an individual or group basis. Privileges are assigned from either the **Privilege Groups** tab or the **Privileges** tab. In either tab, select the box next to the desired item. This will automatically save that item to the Assigned Privileges tab.

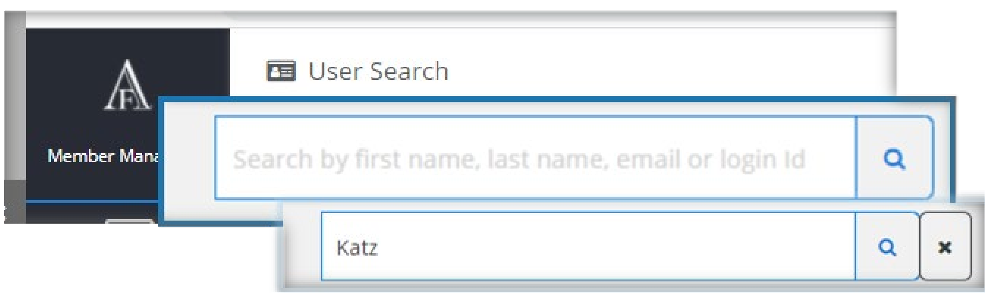
To assign **Privilege Groups** to an existing user:

1. Select **Administration** > **New Member Management**.

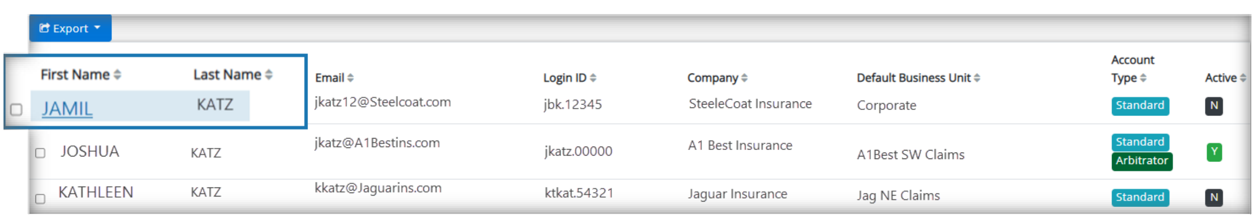
2. Click the Search tile.



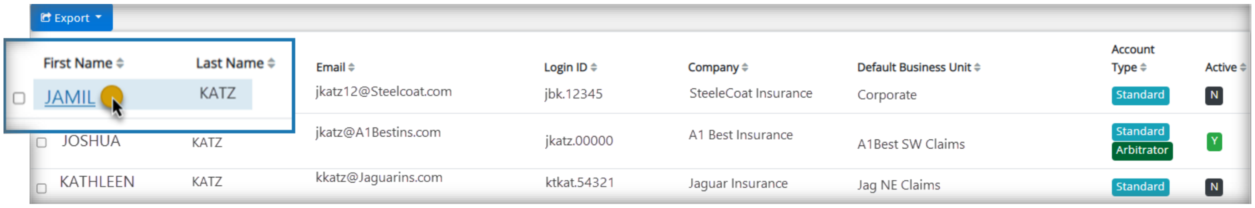
3. Enter the first name, last name, email, or login ID:



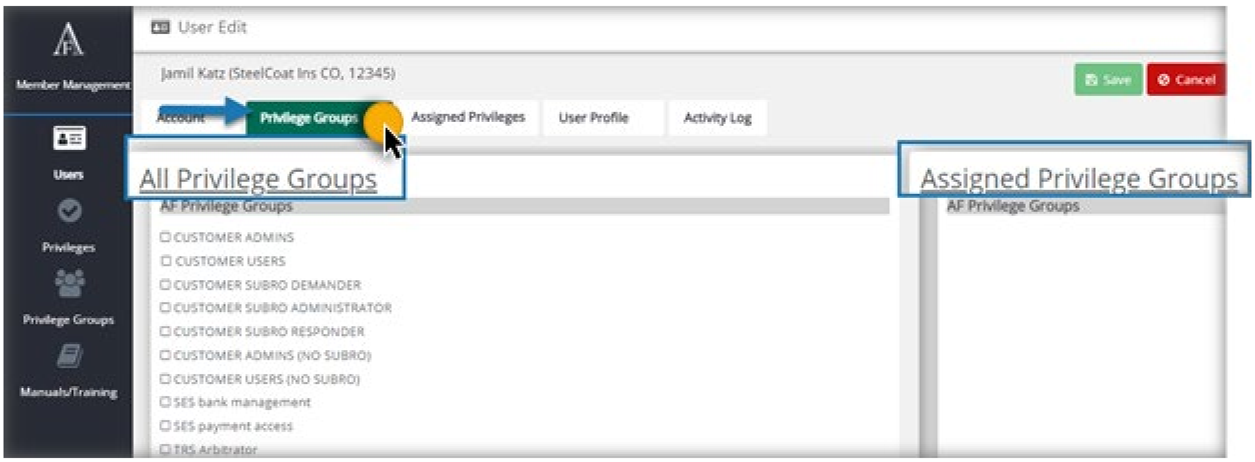
4. Review the resulting list to locate the desired user:



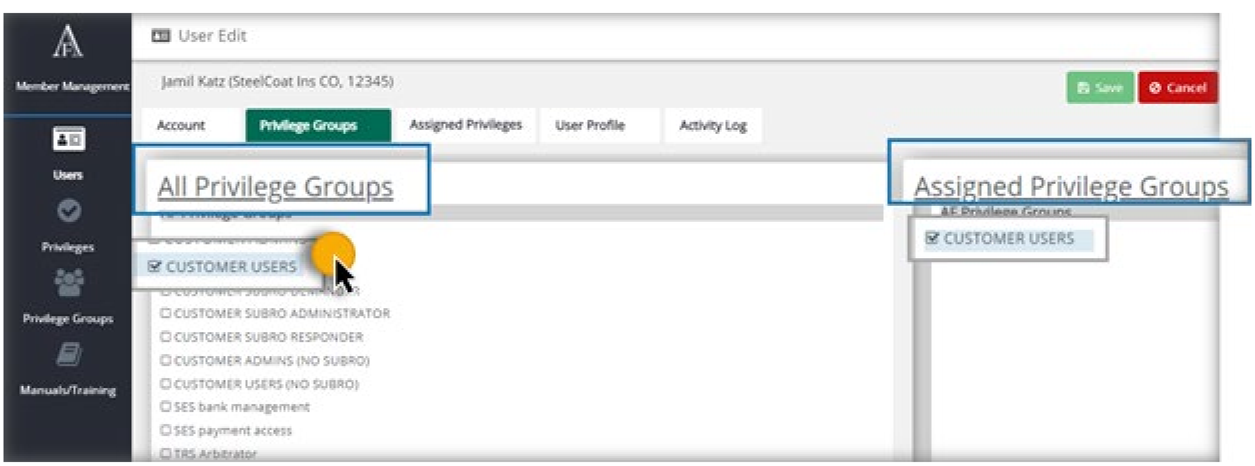
5. Click the name of the user.



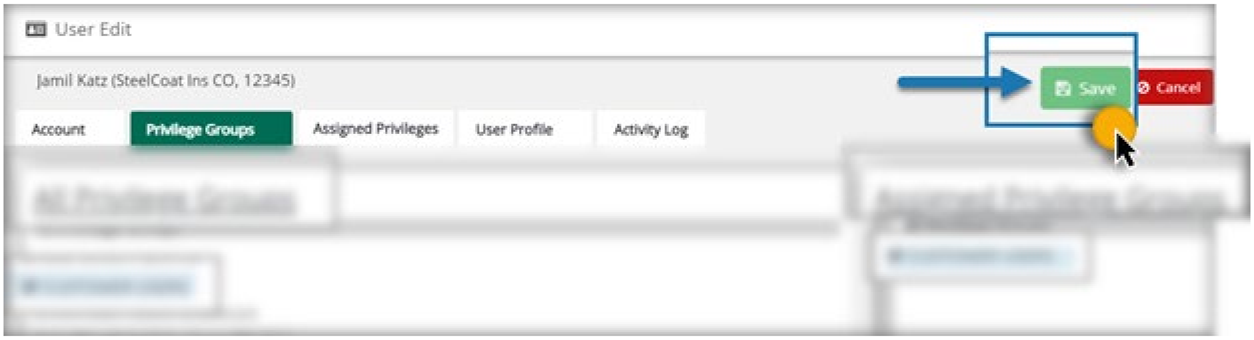
6. Select the **Privilege Groups** tab.



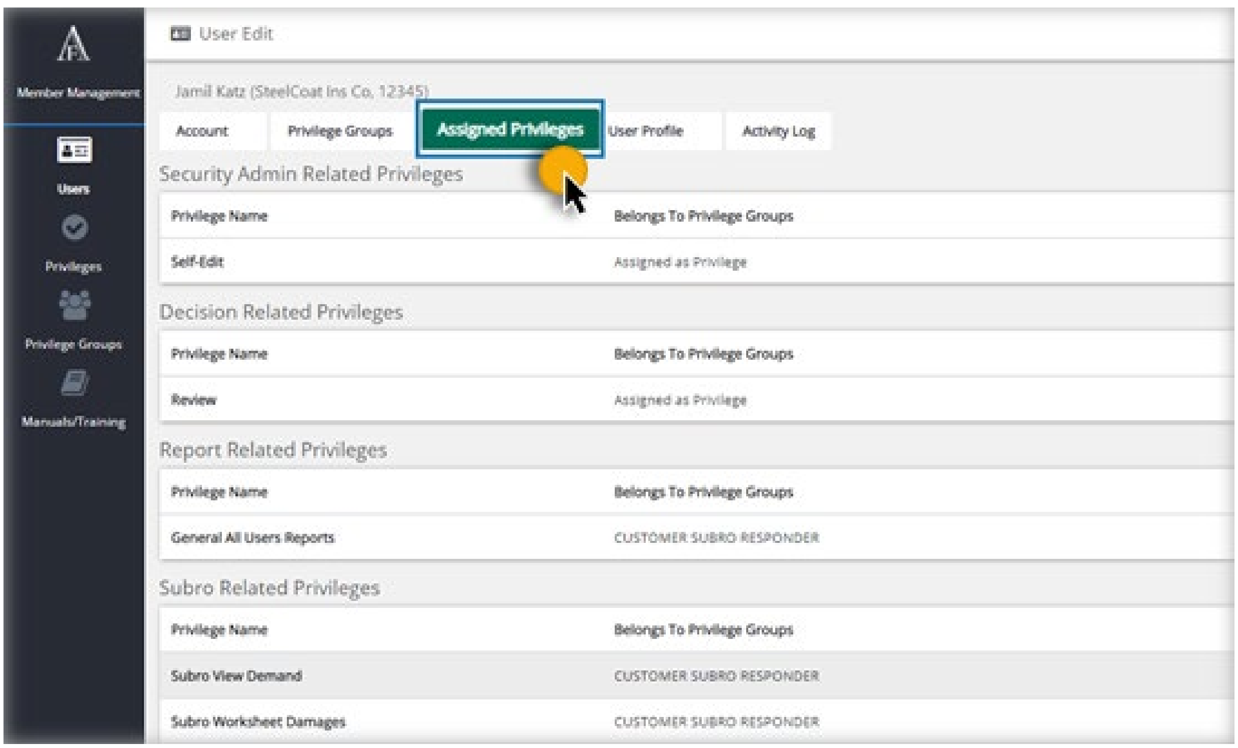
7. Select the privilege(s) you wish to assign to the user. The privilege will automatically move from the **All Privileges** column to the **Assigned Privileges** column.



8. Select **Save** to save the assigned privileges and exit the user's profile.



9. Click the **Assigned Privileges** tab to see a list of the privileges currently assigned to the user.

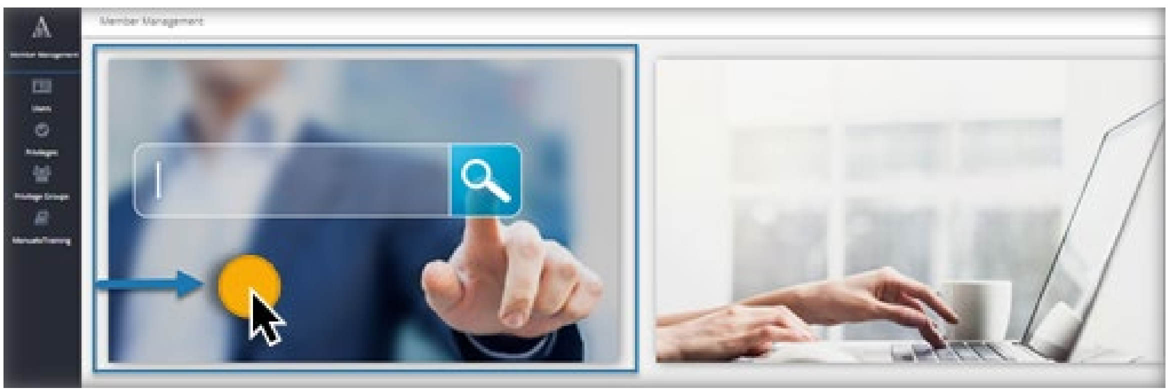


Search User

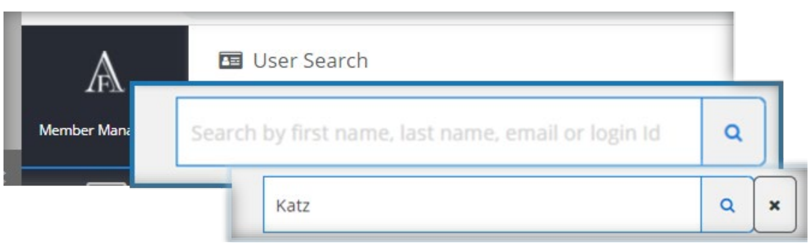
To search for a user:

1. Select **Administration> New Member Management**.

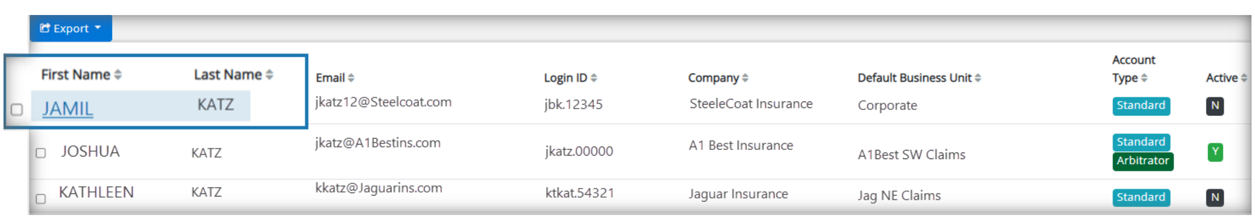
2. Click the Search tile:



3. Enter the first name, last name, email, or login ID:

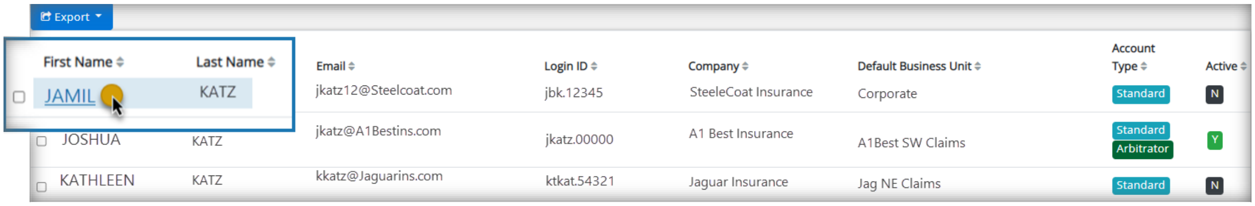


4. Review the resulting list to locate the desired user:



First Name	Last Name	Email	Login ID	Company	Default Business Unit	Account Type	Active
JAMIL	KATZ	jkatz12@Steelcoat.com	jbk.12345	SteeleCoat Insurance	Corporate	Standard	N
JOSHUA	KATZ	jkatz@A1Bestins.com	jkatz.00000	A1 Best Insurance	A1Best SW Claims	Standard Arbitrator	Y
KATHLEEN	KATZ	kkatz@Jaguarins.com	ktkat.54321	Jaguar Insurance	Jag NE Claims	Standard	N

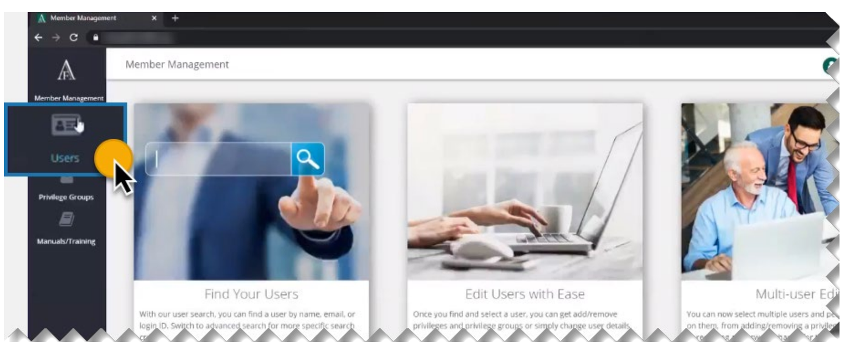
5. Click the user name:



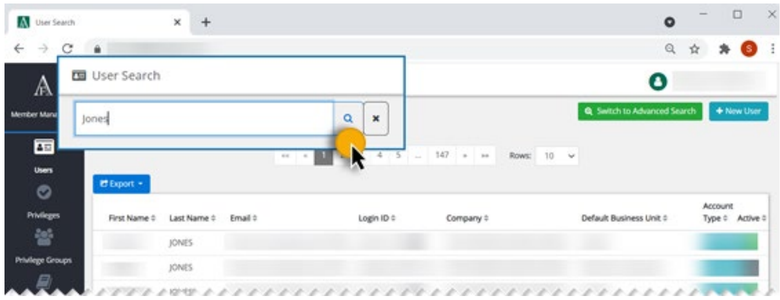
Time Saver: Find a user quickly by using the following navigation.

1. Select **Administration> New Member Management**.

2. Click **Users** on the left side to go directly to **User Search**.



3. Enter the first name, last name, email, or login ID in **User Search**.

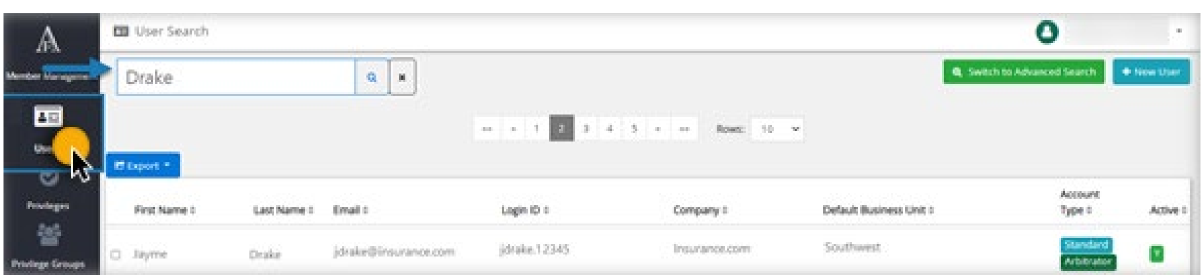


Edit User

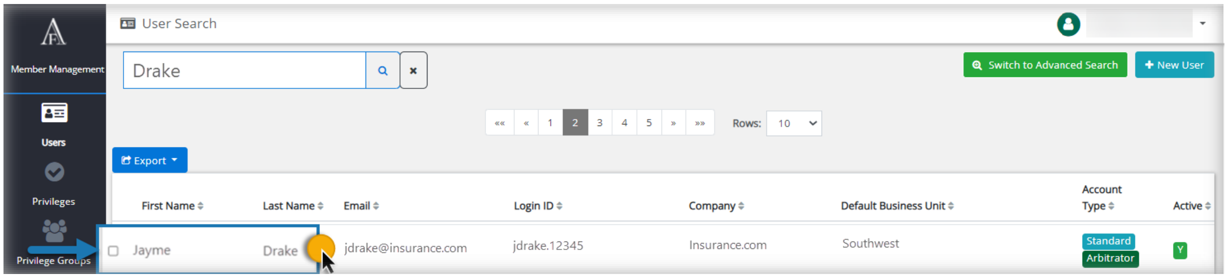
To edit an existing user:

1. Select **Administration** > **New Member Management**.

2. Select **Users** and search for the user you want to edit.

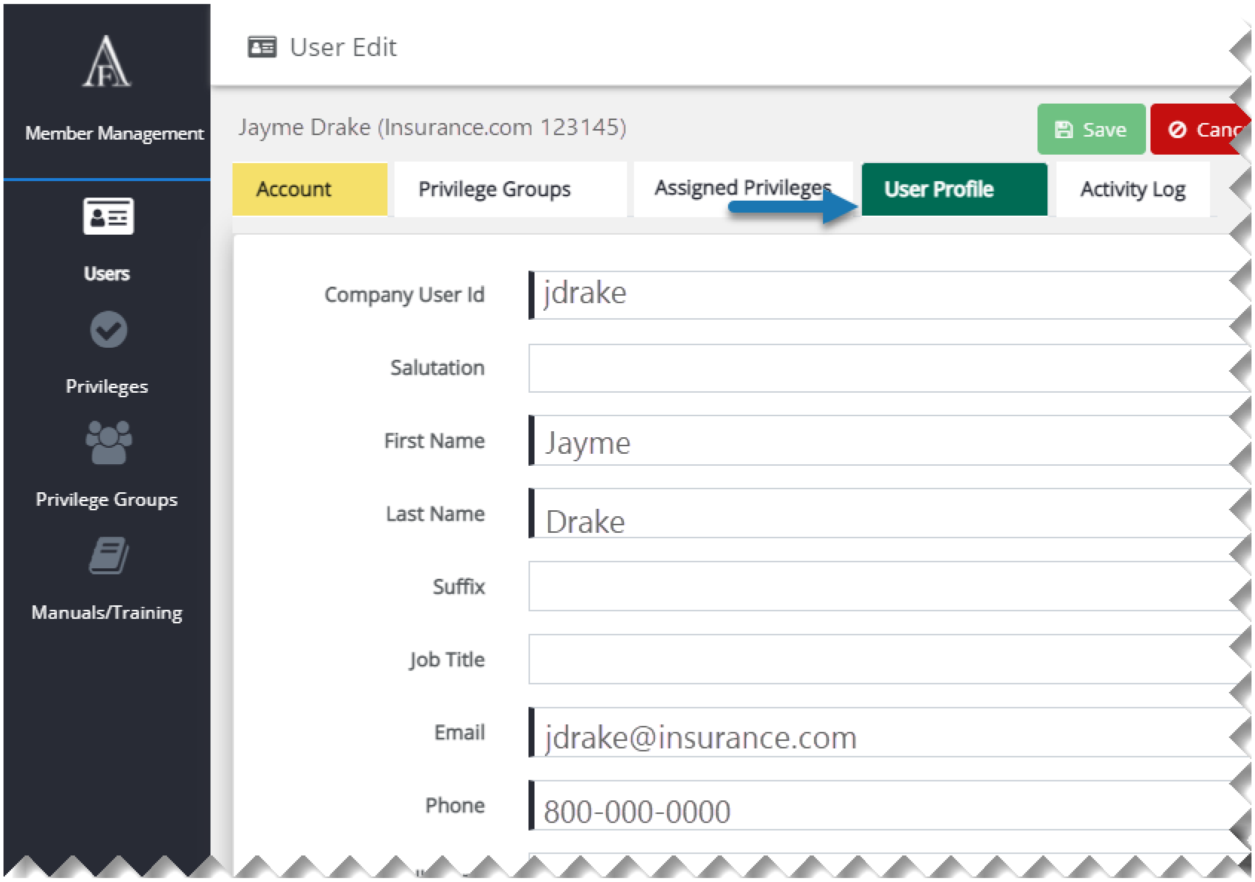


3. Click on the user's name, which brings you directly to the edit screen.



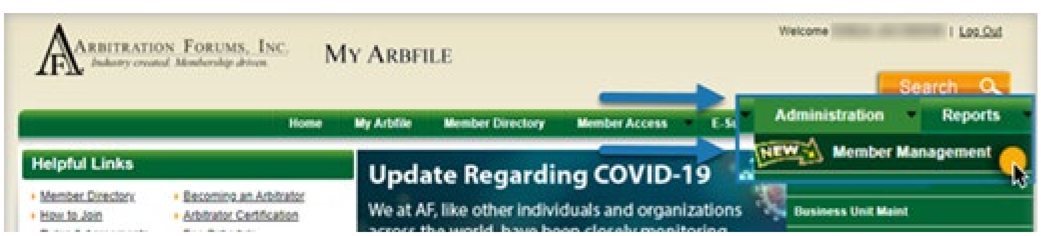
4. Make any desired edits and click **Save**.

Note: Edits can be made from either the **Account** or **User Profile** tab.

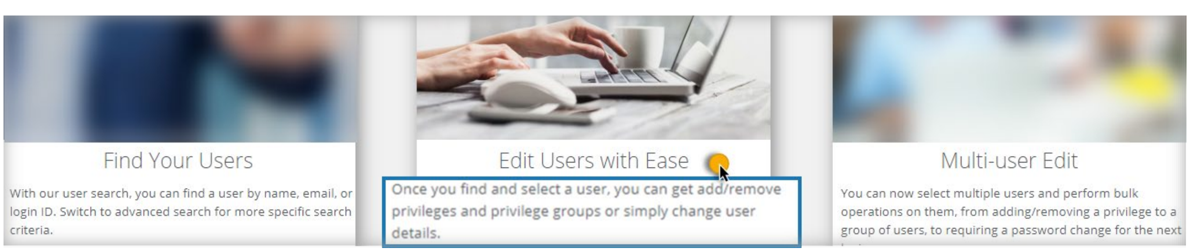


Time Saver: Edit users with ease by using the following navigation.

1. Select **Administration> New Member Management**.



2. Click the **Edit Users with Ease** tile and follow the steps provided.

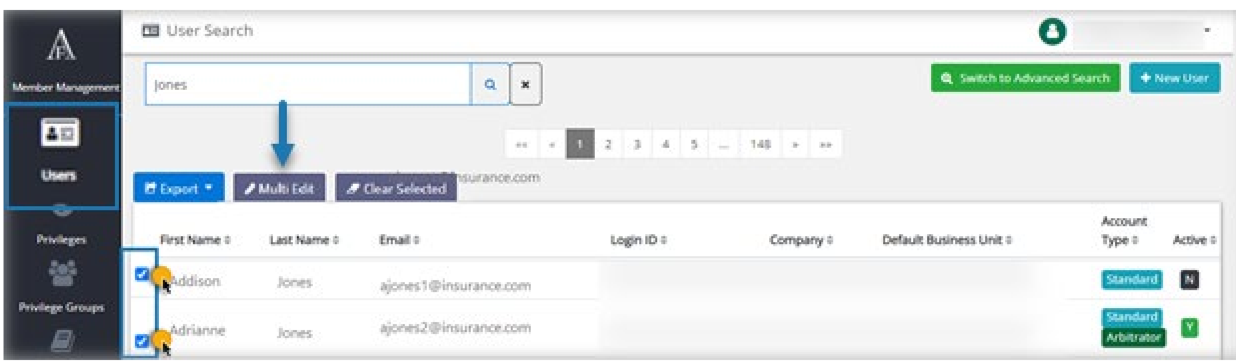


Multi-User Edit

This feature allows security administrators to edit multiple users at one time.

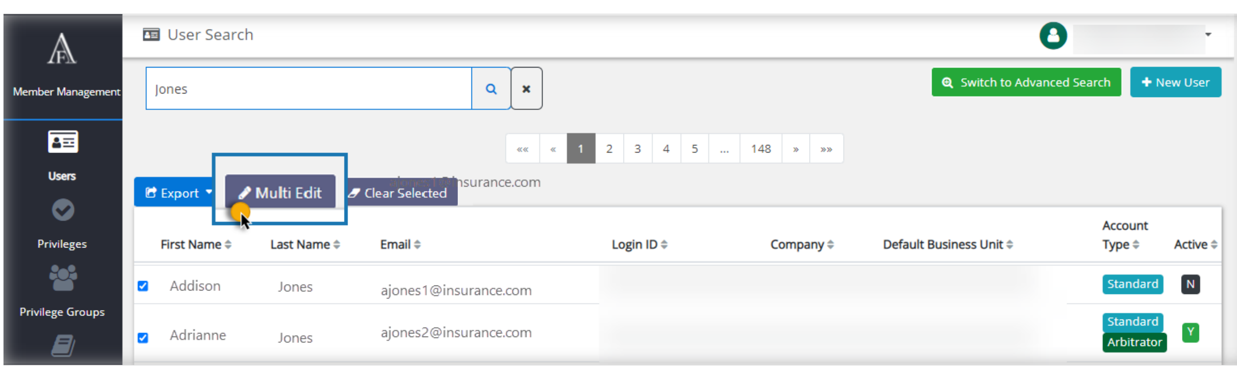
1. Select **Administration> New Member Management**.

2. From the **Users** tab, select users you wish to edit.



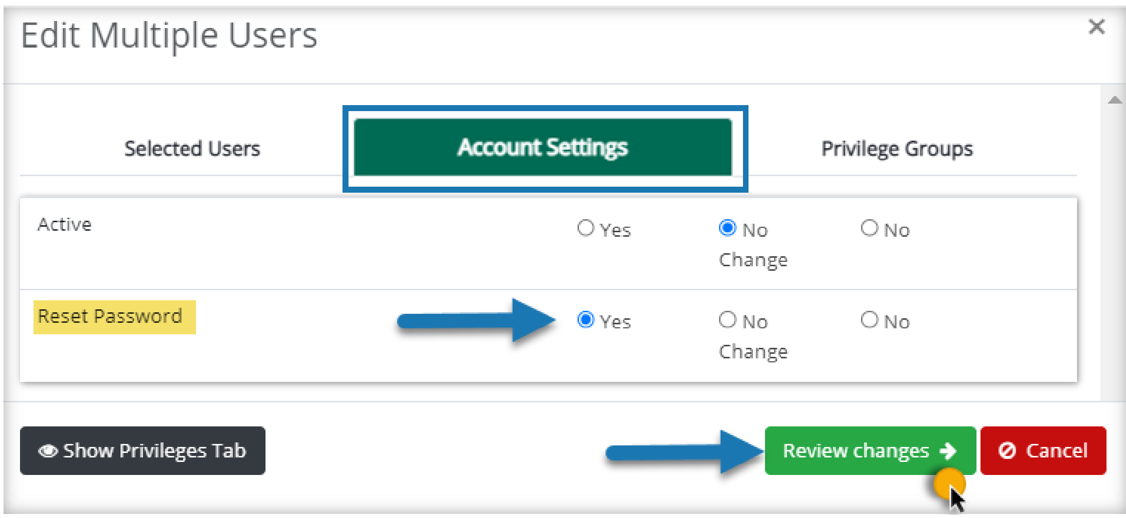
*Note: When selecting multiple users, another tab will appear called **Multi Edit**.*

3. Select **Multi Edit**.

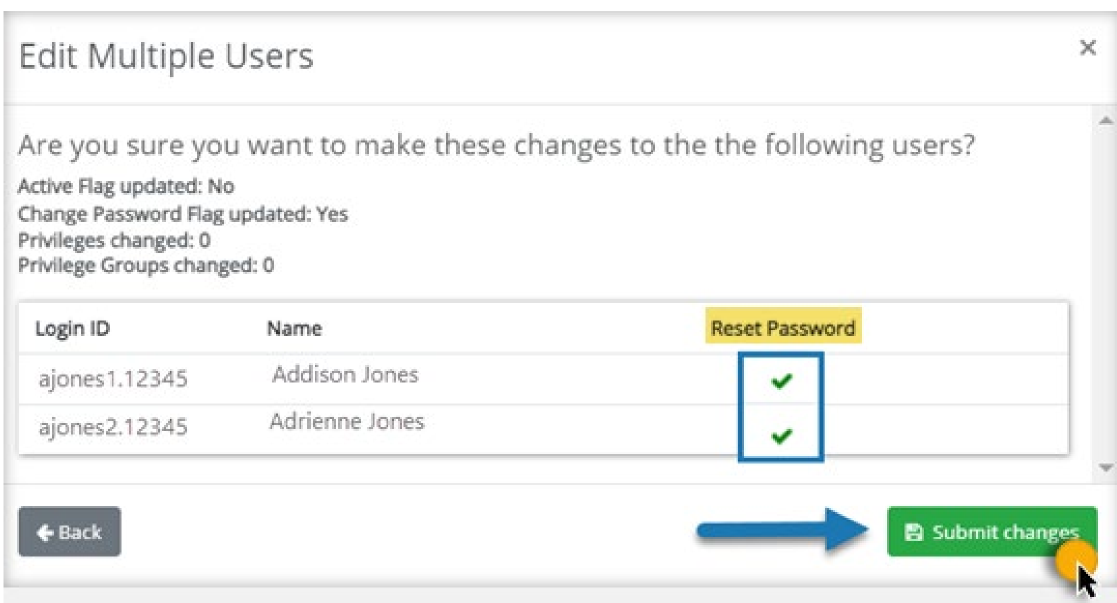


Note: *From this page, you can initiate a password reset for users from* ***Account Settings.***

4. Select **Account Settings,** and select **Yes** next to **Reset Password**, then click **Review changes.**

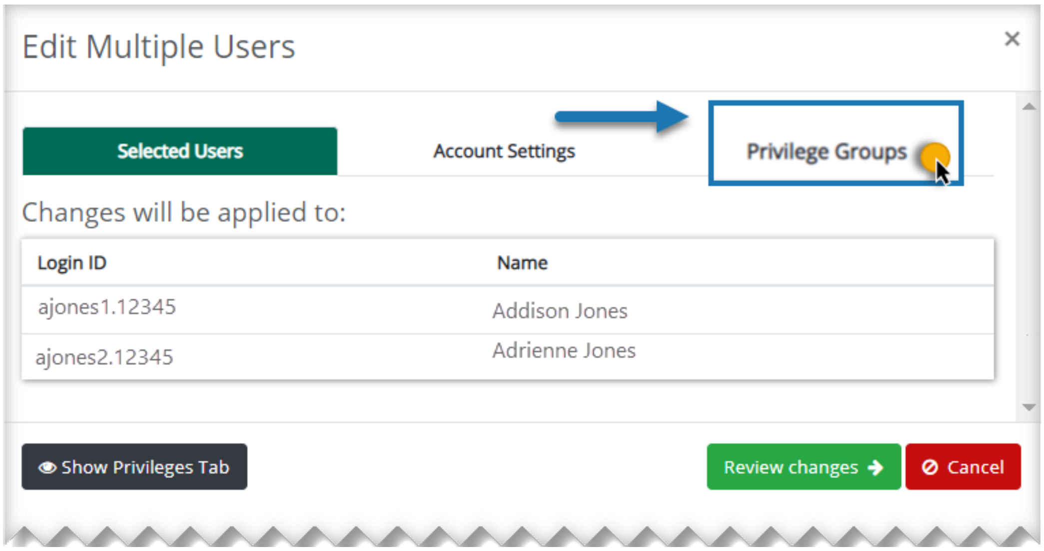


5. Click **Submit Changes** after a careful review.

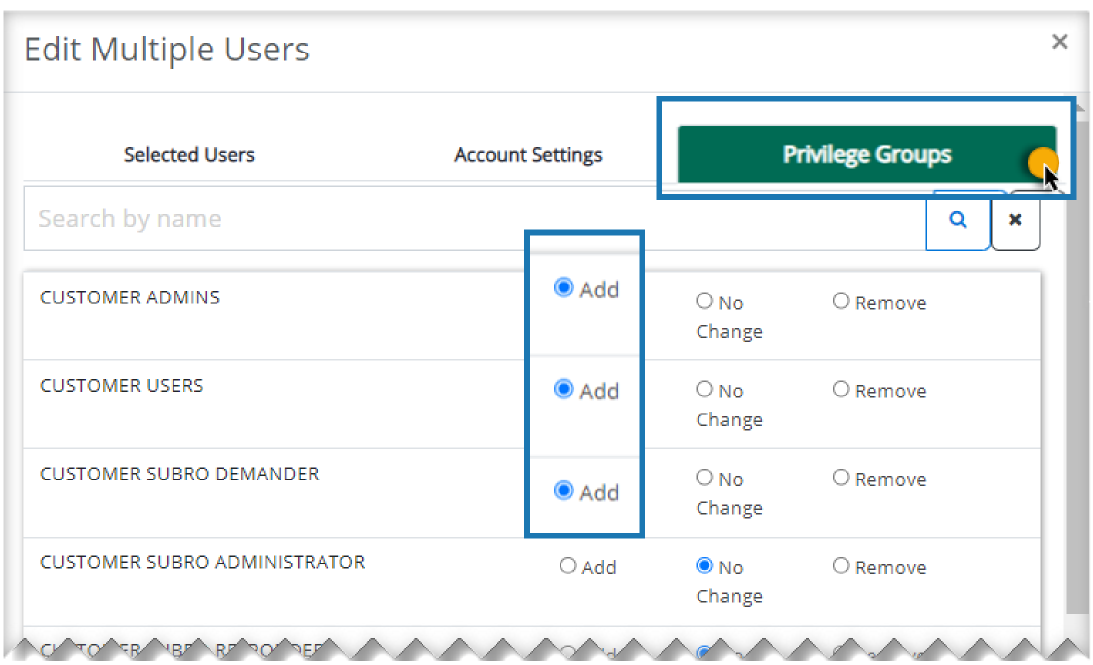


Note: *Multi Edit also allows you to change* ***Privilege Groups*** *for users.*

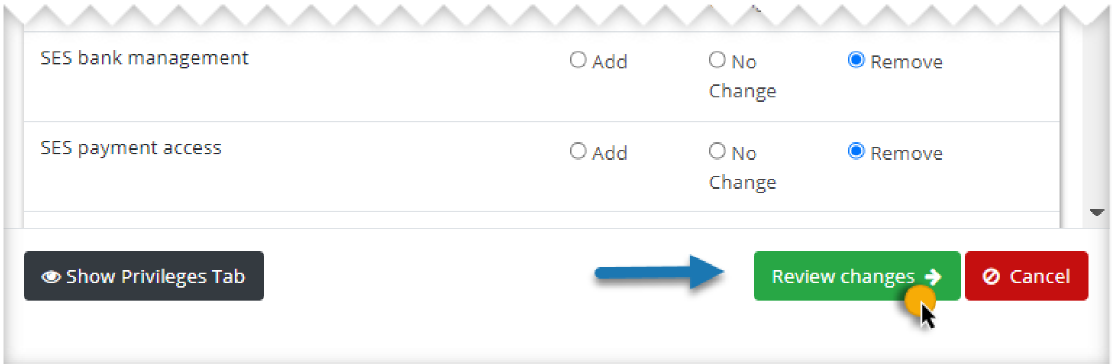
1. Select **Privilege Groups.**



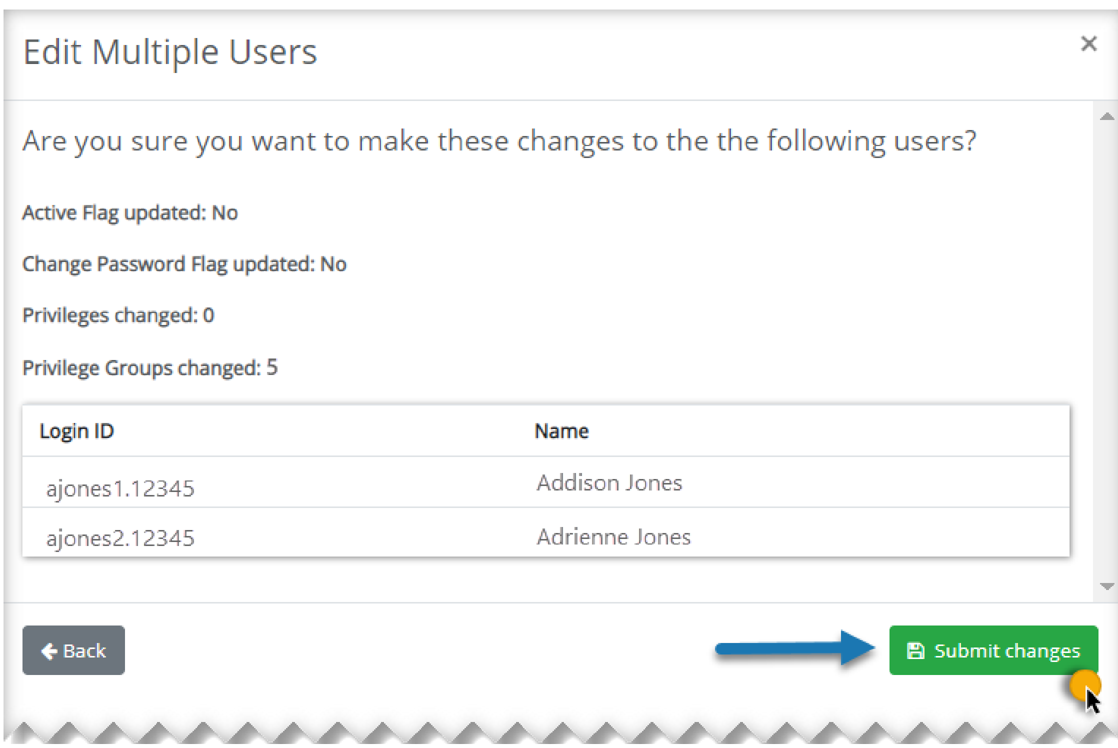
2. Select **Add** or **Remove** next to the specific privilege to change the account of all selected users at once. Privileges that are not added or removed appear with "No Change" selected.



3. Select **Review Changes.**



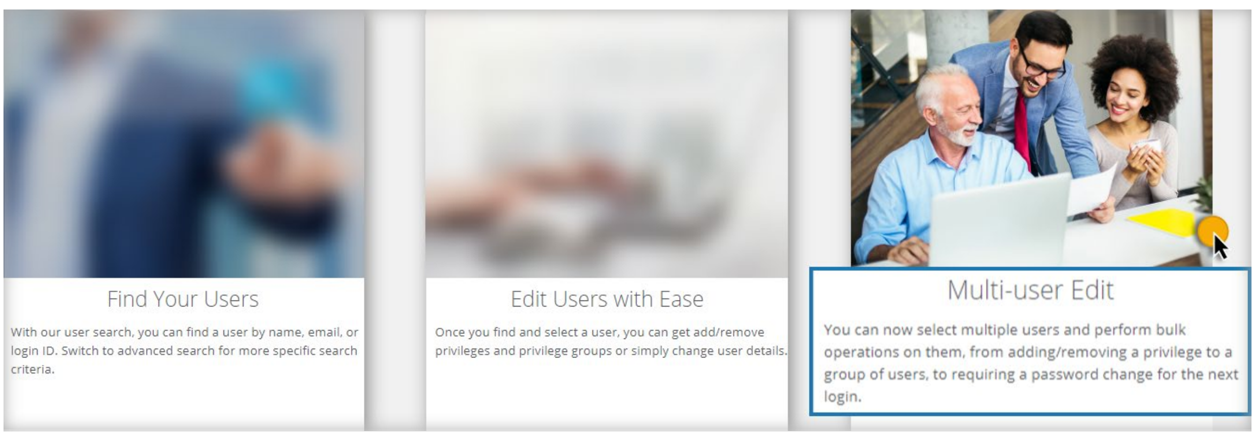
4. Review the changes carefully for accuracy; click **Submit changes**.



Time Saver: Select multiple users and perform bulk operations.

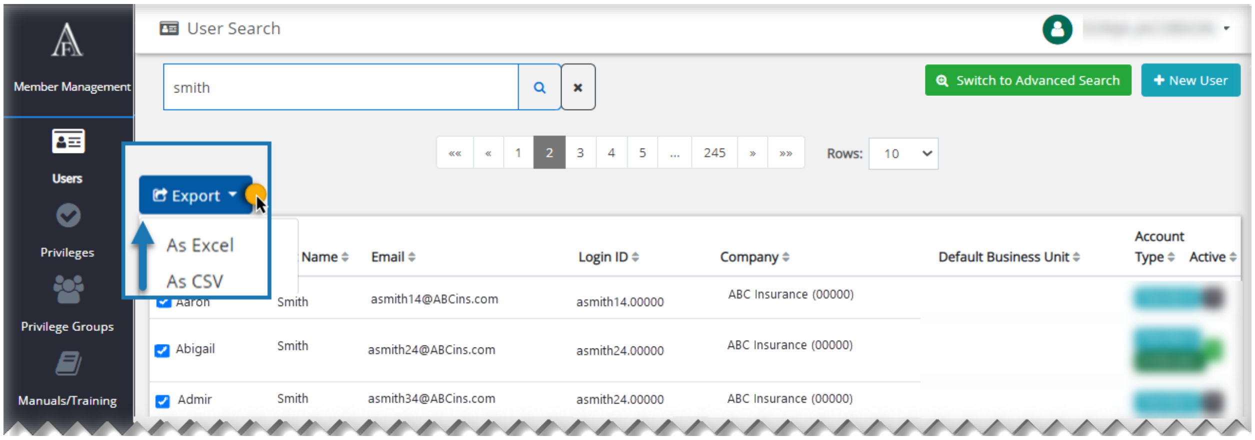
1. Select **Administration> New Member Management**.

2. From the webpage, click on the **Multi-user Edit** tile and follow the steps provided.



List of Users (Export Feature)

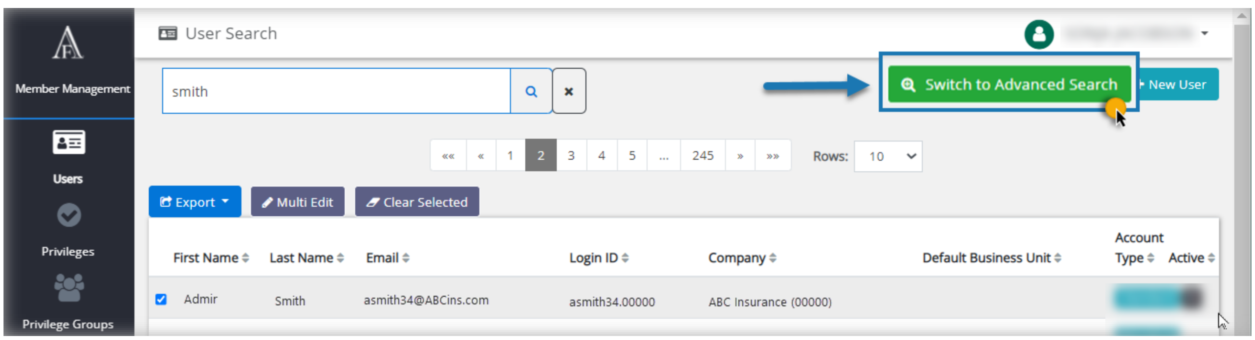
This feature gives system administrators the ability to export a list of users based on the search criteria entered. The list is formatted as an Excel spreadsheet.



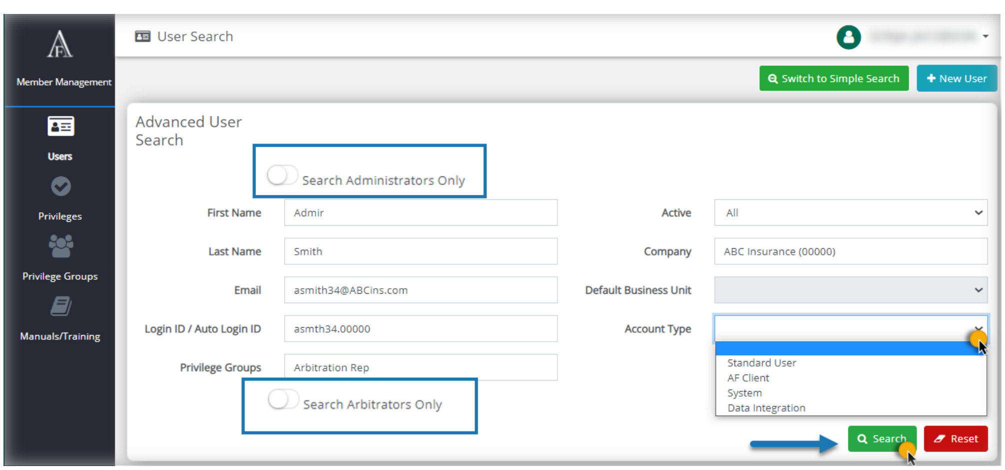
Advanced Search

The **Advanced Search** tab allows users to search using more detailed information.

Go to **Users** and select **Advanced Search**.



From this tab, you can search for a variety of information, e.g., users who are currently active and assigned to specific business units or account types. You can also search for "administrators only" or "arbitrators only."



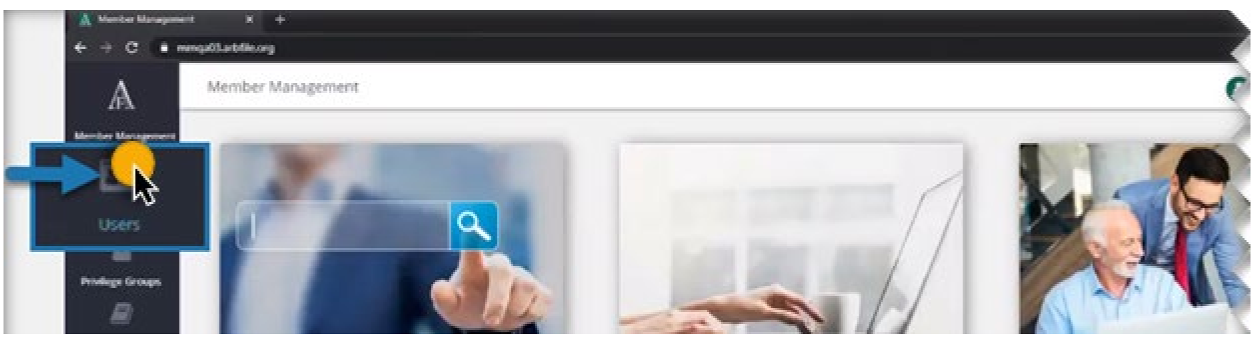
Modify/Reset User Password

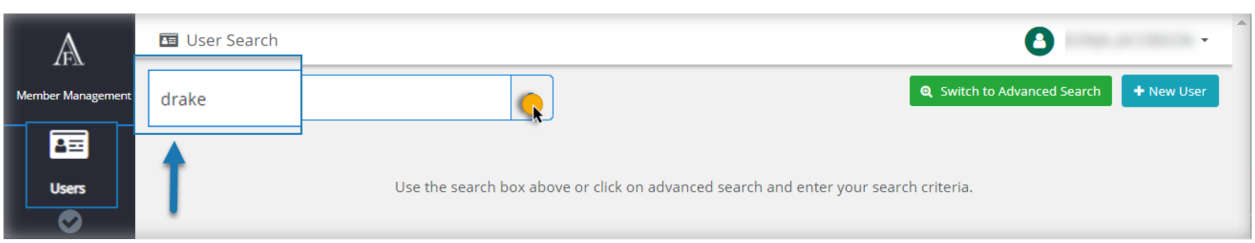
The following provides the steps used to modify the password of an existing user on AF's website. For an overview of users, see [Business Units and Users Overview](#).

To modify the password of an existing user:

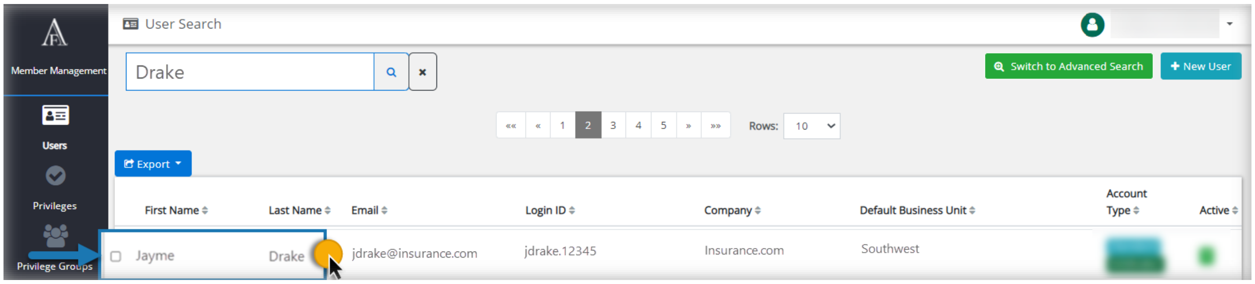
1. Select **Administration** > **New Member Management** from the My Arbfile section of AF's website.

2. Select **Users** and search for a user's name.

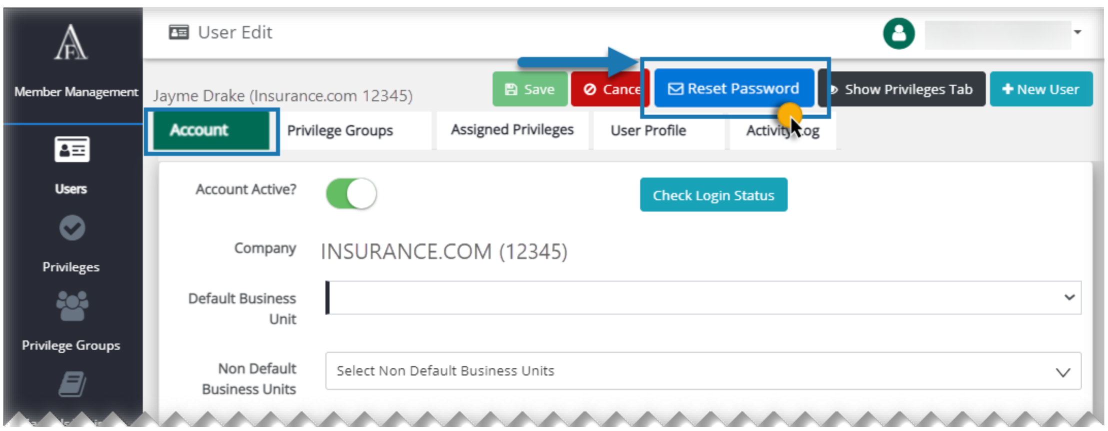


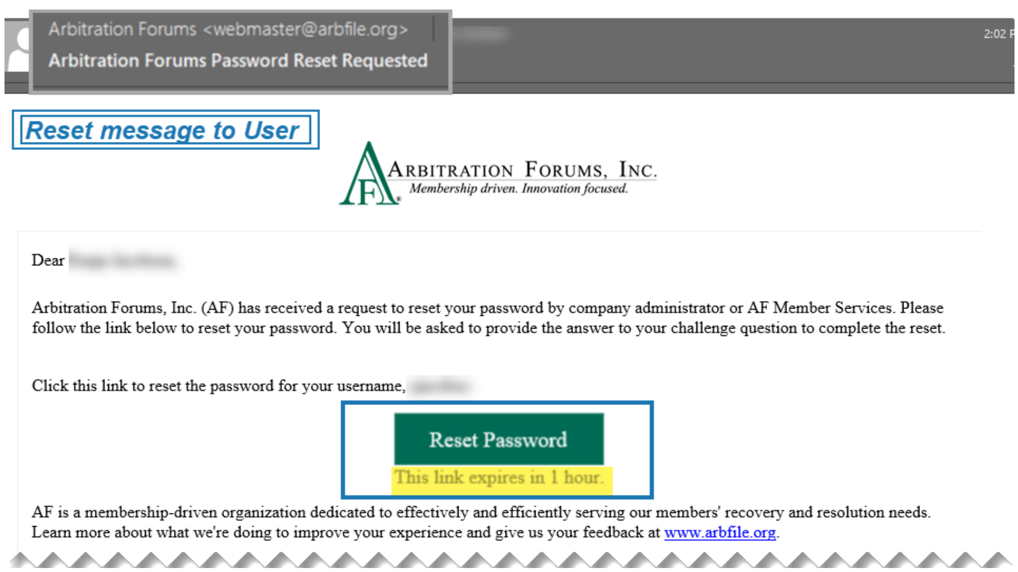


3. Click on the user's name, which brings you directly to the edit screen.



4. Click **Reset Password** and the user then receives an email to reset the password; the user will need to answer the security question.



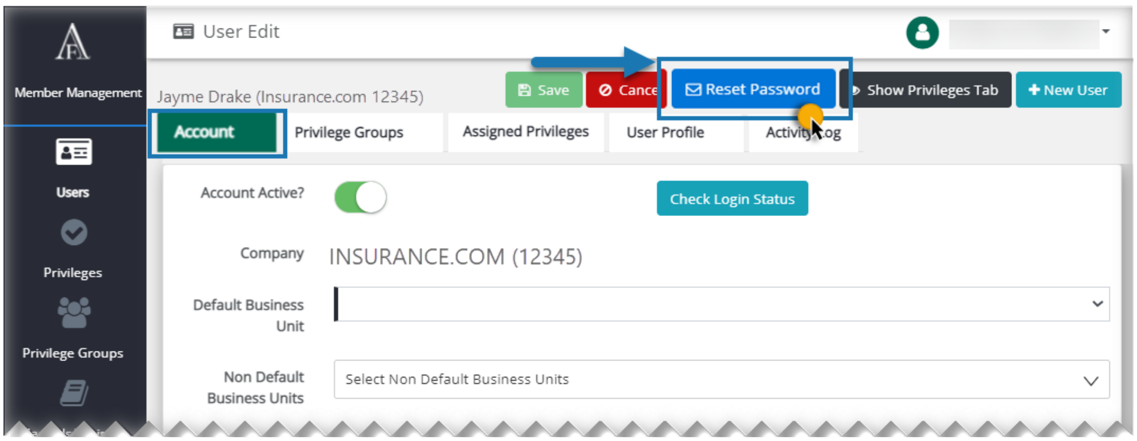


Reset Password – Password and Answer to Security Question Forgotten

The following provides steps to reset the password for an existing user on AF's website when the user has forgotten **both the password and the answer to the security question**.

In this instance, use the following steps to reset the user's password:

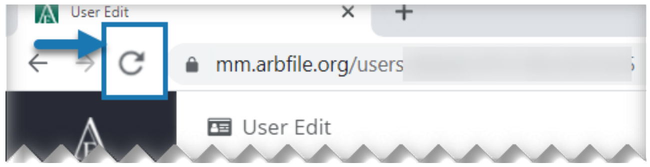
1. Follow steps 1-3 under Modify User Password.
2. Click **Reset Password** for the user.



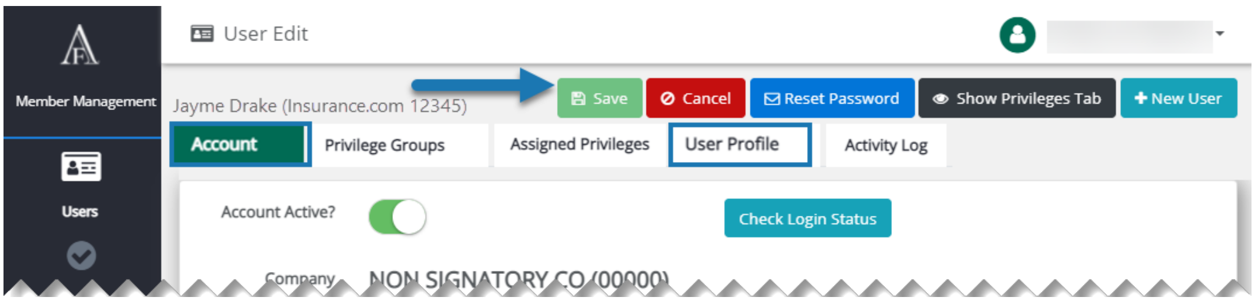
3. Direct the user to go to their email and click **Reset Password** in the message from AF.

Note: *Inform the user to ignore the prompt to enter the answer to the security question that appears.*

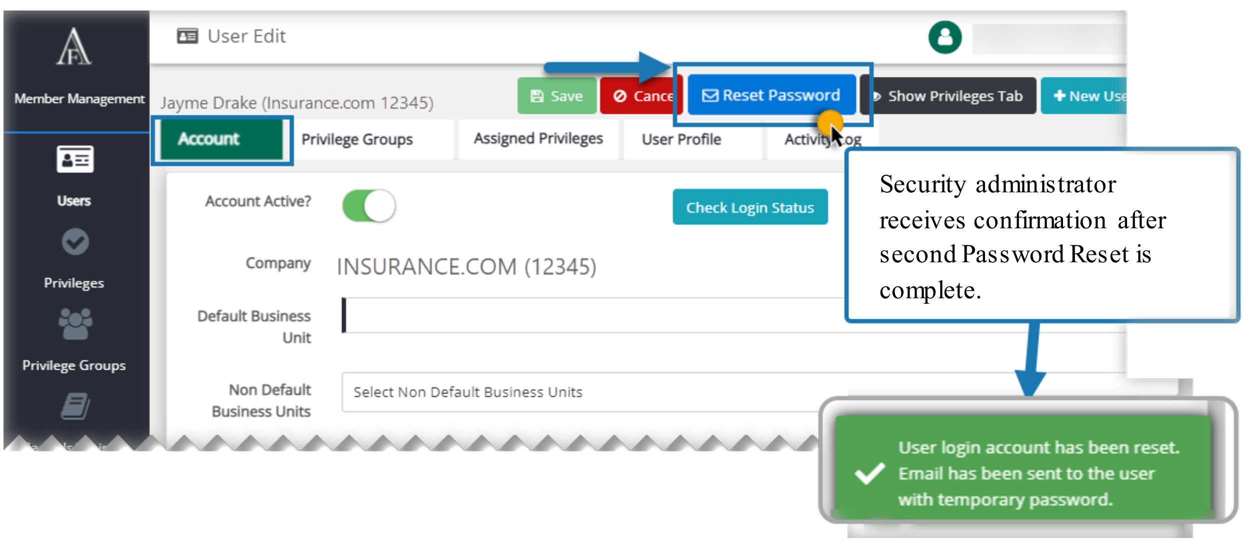
4. Refresh your browser.



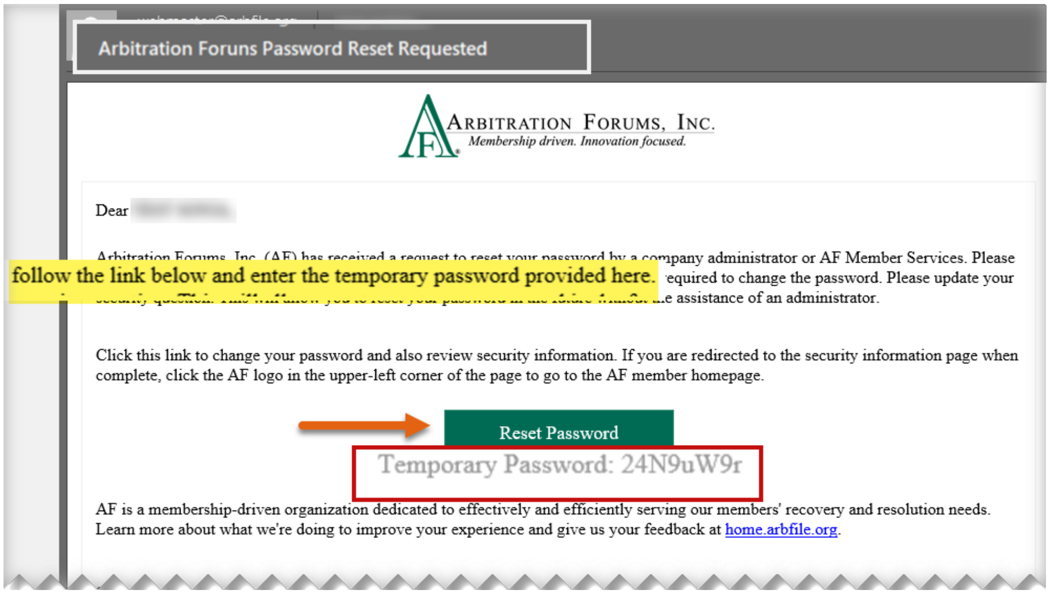
5. Click **Save**.



6. Click **Reset Password** a second time.



7. Direct the user to look for a second message with directions and a **temporary password:**



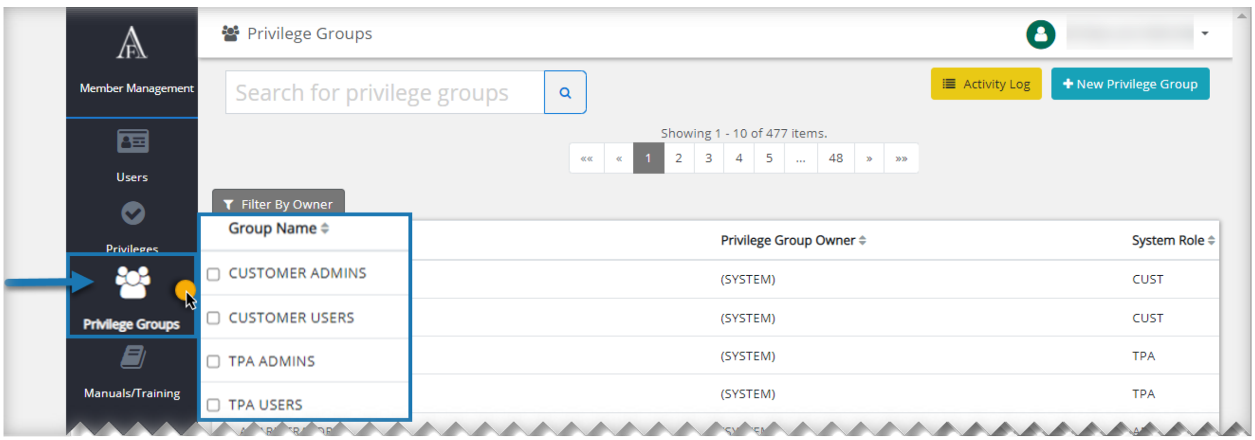
V. Create a New Privilege Group

Creating a New Privilege Group allows security administrators to create a new privilege group for specific users with various tasks. For example, a user who is assigned to the **Customer User Group Privilege** may also need privileges to run reports. Instead of allowing all users within that specific privilege group to have access to reports, the security administrator can create a new privilege group. Once the new group is created, the security administrator can add specific privileges within the group without granting access to **all** users assigned to that original group privilege.

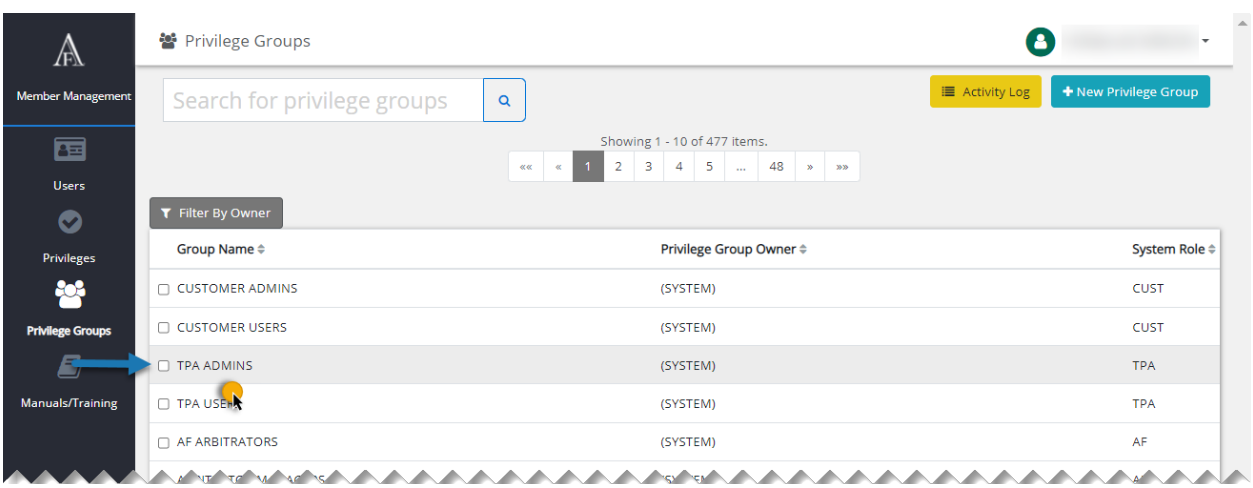
Due to the sensitive nature, and potentially large impacts of privilege groups, AF recommends working with an AF representative to assist in privilege group creation. Please contact us at 1-866-977-3434 or support@arbfile.org.

1. To create a new privilege group, select **Administration** > **New Member Management**.

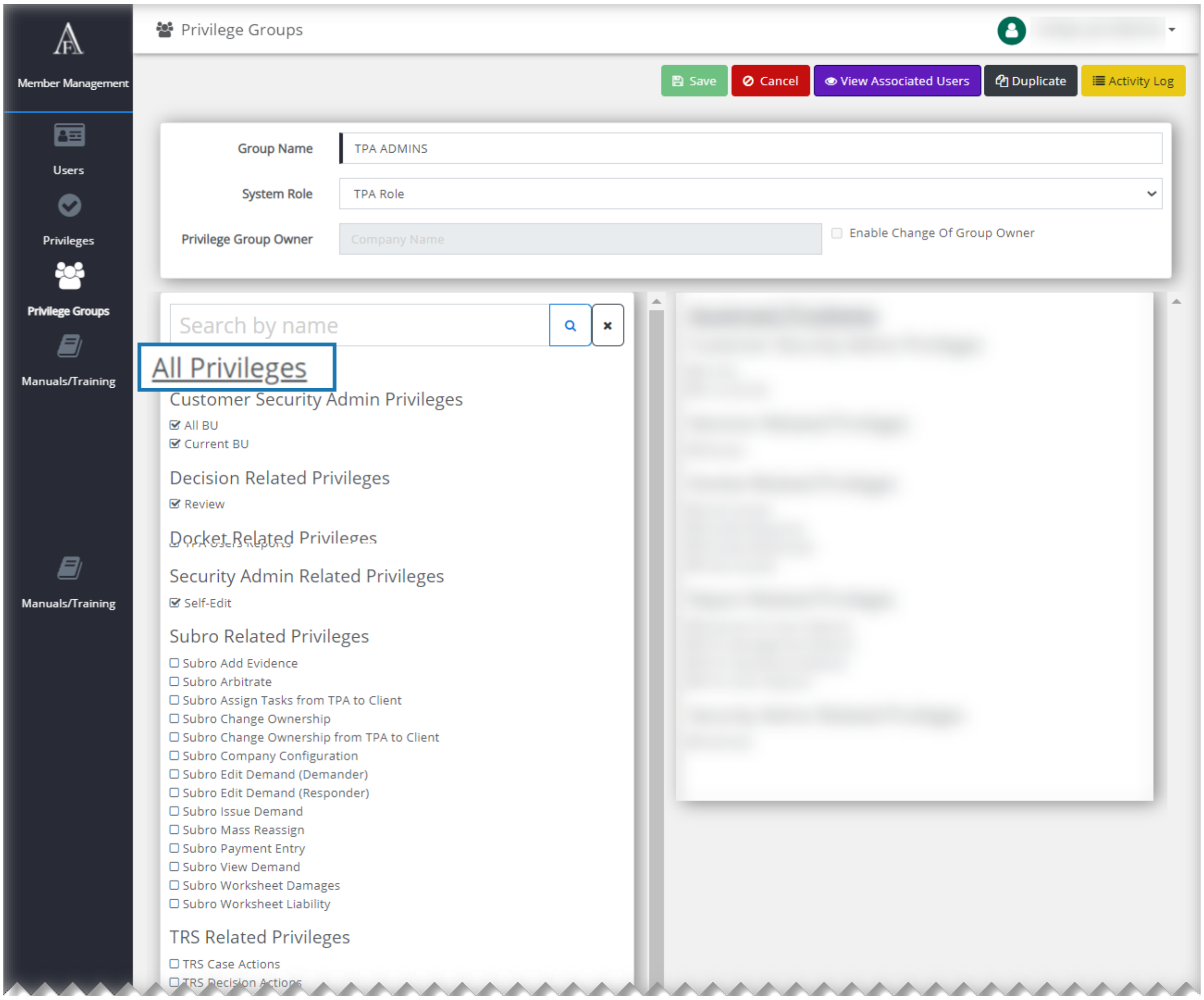
2. Select **Privilege Groups** and a group of privileges appears.



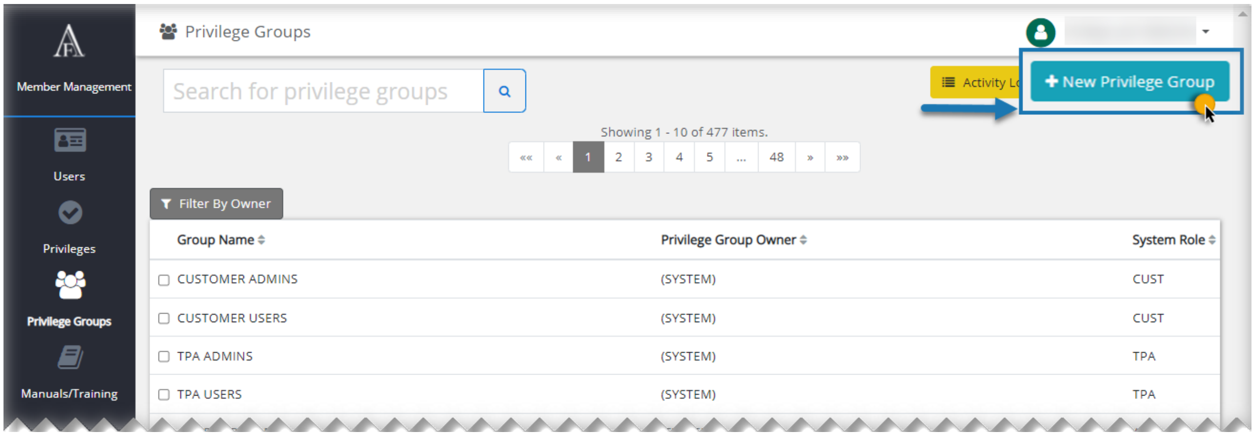
3. Select the group name to see the privileges that are assigned to that group.



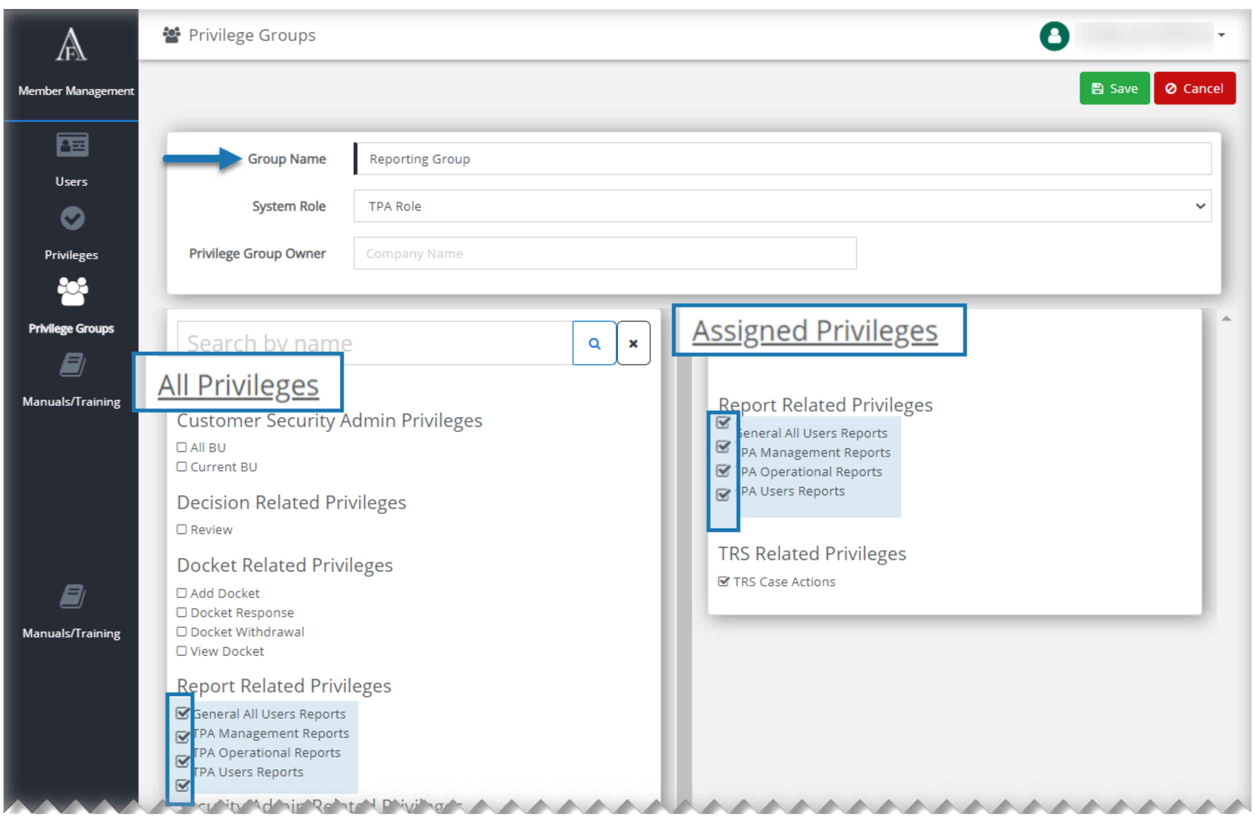
4. **All Privileges** for the selected group appear.



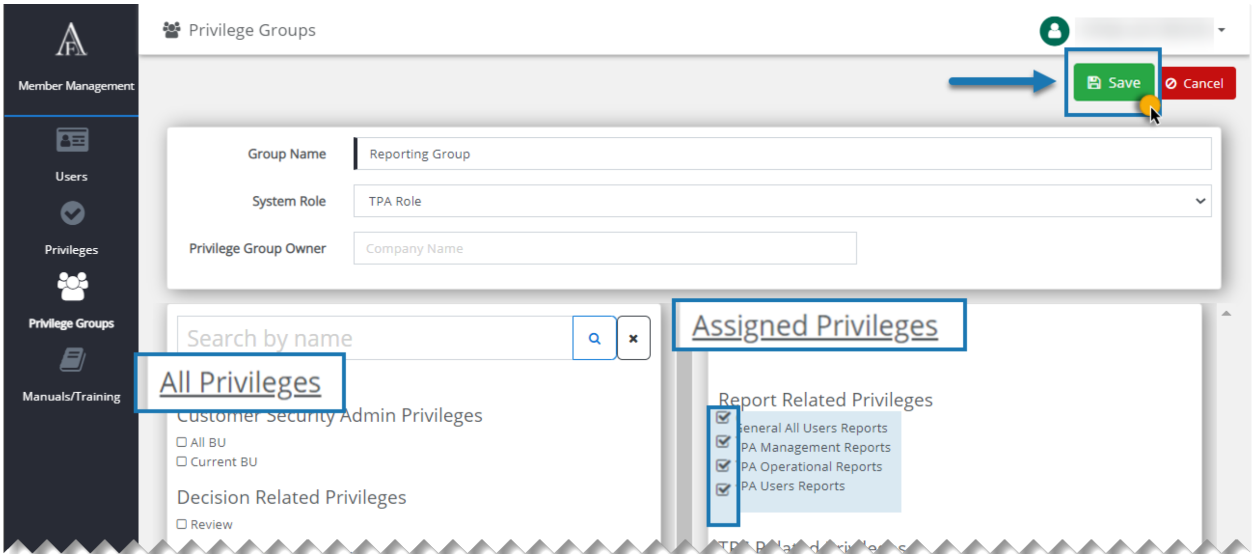
5. To Create a New Privilege Group, select **New Privilege Group**.



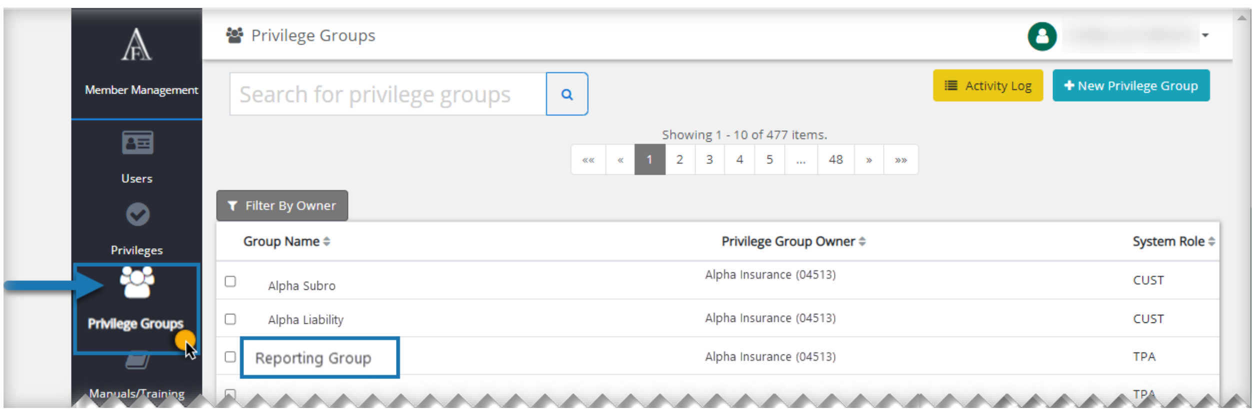
6. Enter a **Group Name**, and then select **Privileges** for that group from the left column. To assign privileges, simply select the box next to specific privileges under **All Privileges**. This will automatically assign the privileges, and they then appear under **Assigned Privileges**.



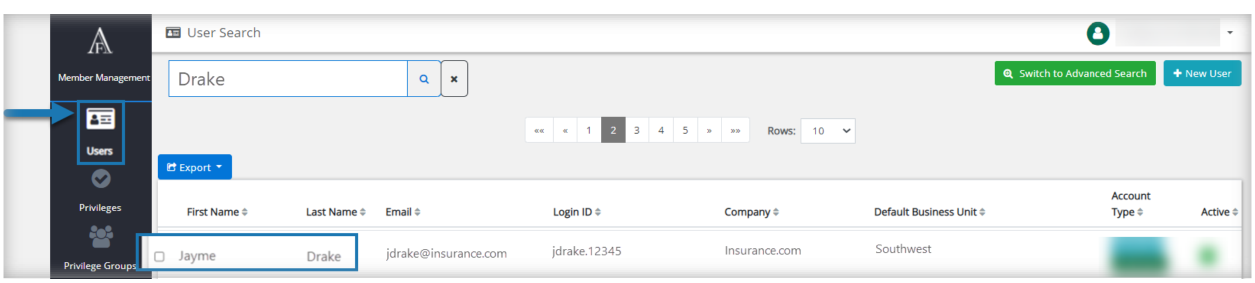
7. Save your selections.



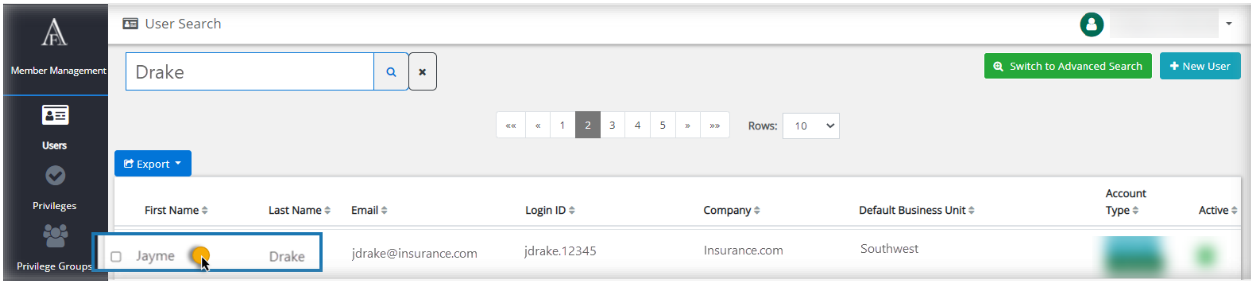
8. Go to **Privilege Groups** to see your newly added Privilege Group.



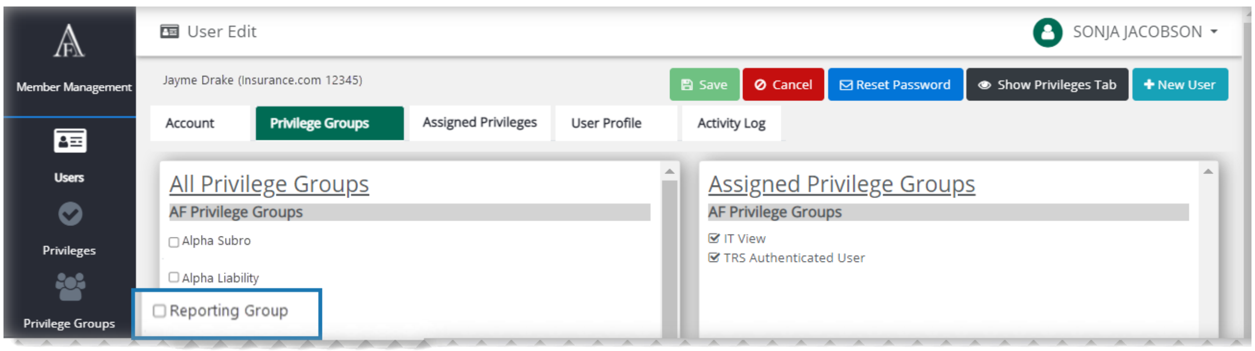
9. To add this Privilege Group to specific users, go back to the **User** tab and search for each user's name.



10. Select the specific user by clicking on the name.



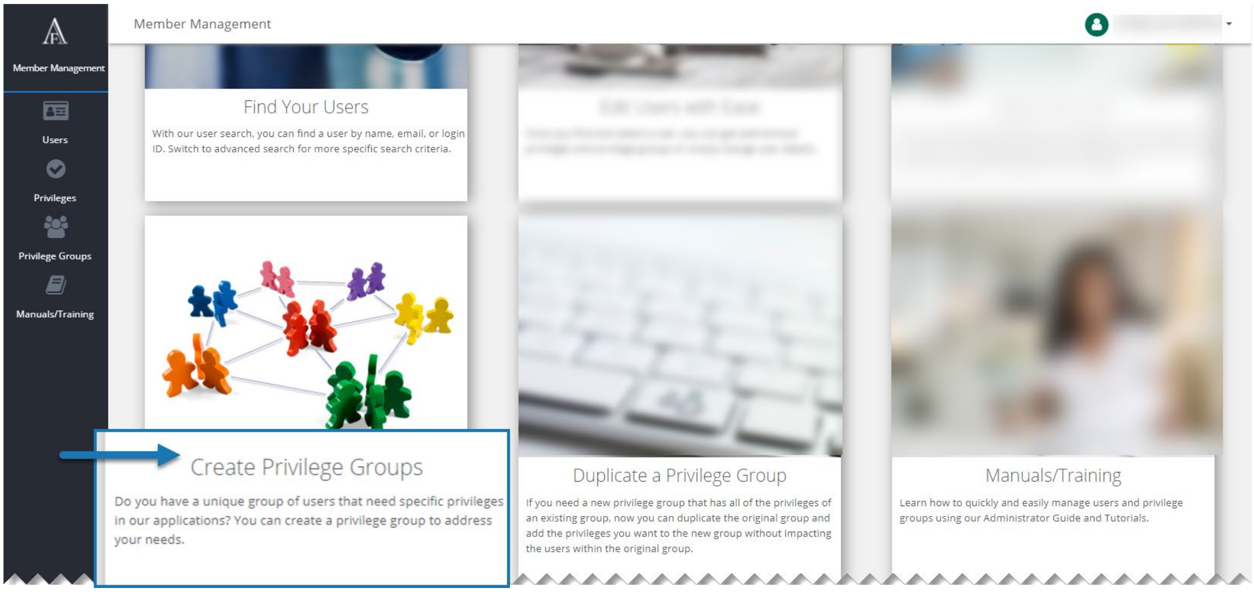
11. Select **Privilege Groups** and assign this privilege to specific users.



Time Saver: Create a New Privilege Group

1. Select **Administration> New Member Management.**

2. Click the **Create Privilege Groups** tile.



3. Click **New Privilege Group** and follow the steps outlined above.