

User Guide: System Functionality

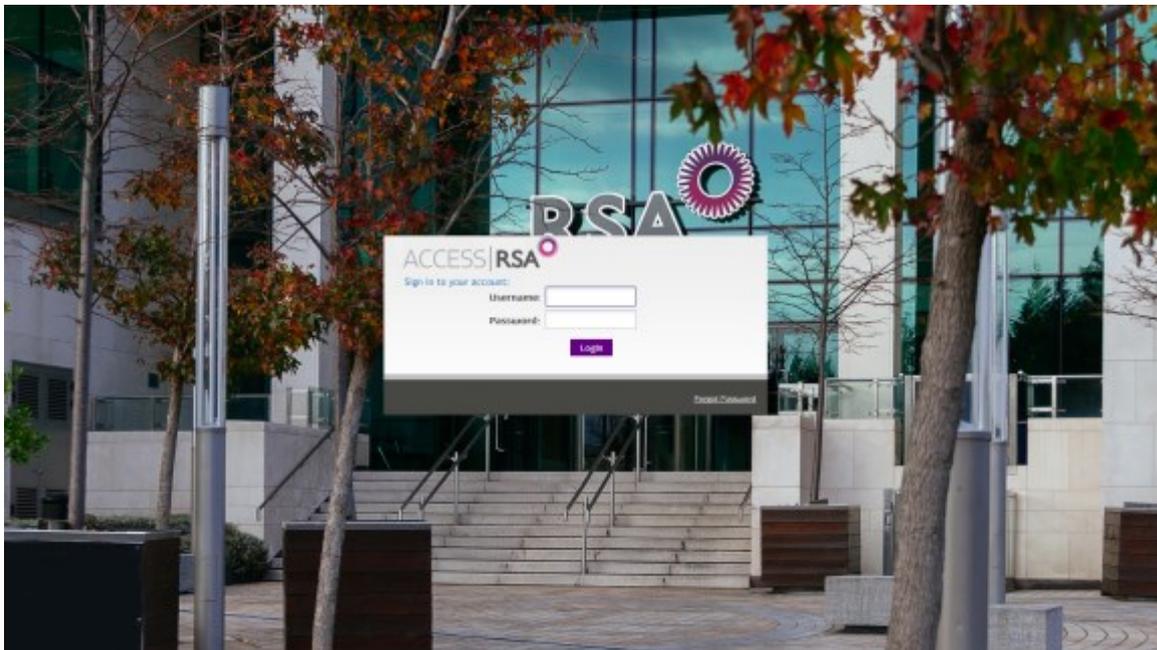


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SYSTEM FUNCTIONALITY

SIGNING IN & FORGOTTEN PASSWORDS



To begin trading on Access RSA you will need your login details which will be sent to you by email. Go to www.rsagroup.ie/AccessRSA.

After you sign in for the first time you will be required change your password. Your password must be at least 8 characters, contain a combination of numbers, letters, at least one capital letter, and a special character (e.g. \$, !).

Passwords expire after 60 days. You then have 60 days to change your password before your account becomes inactive.



Forgot Password

Username:

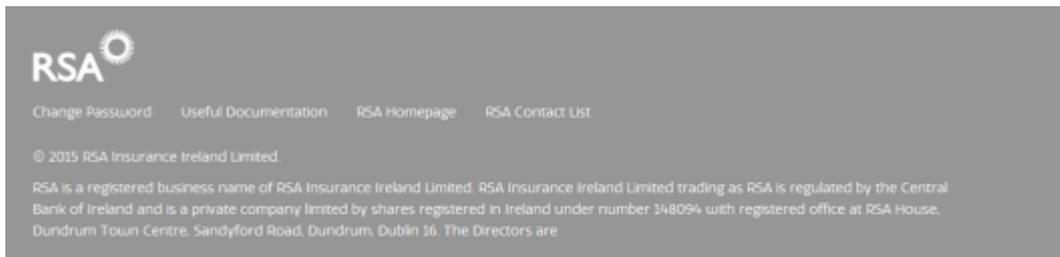
Email:

If you forget your password click "Forgot Password" on the bottom right of the login box. You will then be brought to the screen shown on the left. Enter your username and email address and click "Ok". A password reset email will be sent to you.

SYSTEM FUNCTIONALITY

CHANGING YOUR PASSWORD

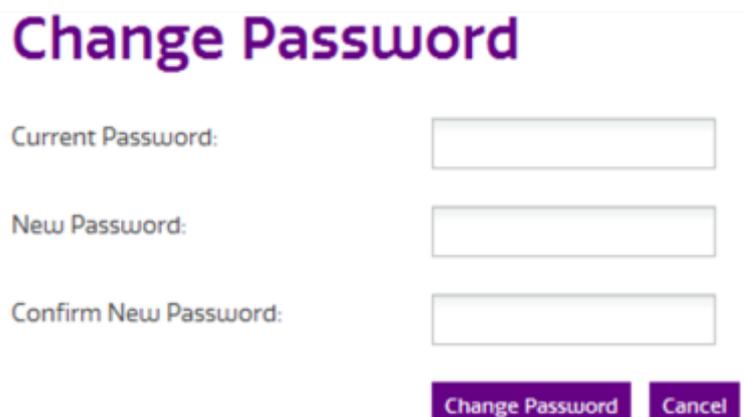
For security reasons we recommend that you change your password on a regular basis. To do this click the “Change Password” link in the footer.



You will then be brought to the “Change Password” screen. Enter your current password and your new password.

Remember that your password must be at least 8 characters, contain a combination of numbers, letters, at least one capital letter, and a special character (e.g. \$, !).

Click the “Change Password” button to confirm the change.

A screenshot of the "Change Password" form. The title "Change Password" is displayed in a large, bold, purple font at the top. Below the title are three input fields, each with a label to its left: "Current Password:", "New Password:", and "Confirm New Password:". At the bottom of the form are two buttons: a purple button labeled "Change Password" and a white button with a purple border labeled "Cancel".

SYSTEM FUNCTIONALITY

NAVIGATING YOUR HOMEPAGE

The screenshot displays the Access RSA homepage. At the top left is the logo 'ACCESS | RSA' with a red sun icon. To the right is a search bar with a dropdown menu for 'Quote/Policy Reference', a search input field, a 'Search' button, and a 'Logout' link. Below the logo is a navigation bar with tabs: 'Home', 'Tasks', 'Renewals', 'Contact List', 'Quote/Policy', and a 'New Quote' button. The main content area is divided into two sections: 'Notifications' and 'Tasks'.

Notifications - Recently Accessed

Quote/Policy Reference	Insured Name
QSH00071422	Maestyle Design Ltd.
QOC0020006	Mr. James McNulty
QOFF0071350	Snapshots Ltd
QOFF0071391	Butler & Co. Registered Auditors
QOFF0071390	Eastside Dental
QOFF0070646	Creative Web Development Ltd.
QPOC0032296	Mr. John Forde
QPOC0071375	White Property Ltd.
QSH00068693	Washington Street Bookstore Ltd.
QOC0070704	Michael J Hall

Tasks

Quote/Policy Reference	Insured Name	Title	Owner	Last Updated
QOFF0070811	Regan Properties	Approved Referral	Amy Farrell	07/11/2016 16:51
QOFF0071261	Karma Ltd	Approved Referral	Amy Farrell	05/11/2016 15:54

[View All Tasks](#)

Your homepage is designed to allow you to navigate Access RSA as efficiently as possible.

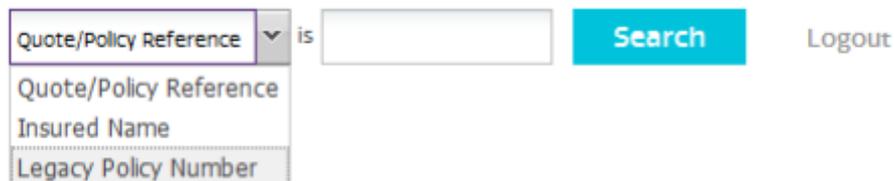
Important news and updates from RSA will be displayed in the "Notifications" box. Keep an eye on this for announcements such as updates to Access RSA or scheduled system maintenance. Click on the message title to find more information.

Under "Tasks" you will find a summary of your pending tasks (such as a policy due for renewal). Click the quote/policy reference to go to that task.

The "Recently Accessed" box allows you to quickly navigate back to any of the last 10 policies you accessed without having to search for them.

SYSTEM FUNCTIONALITY

FINDING A POLICY

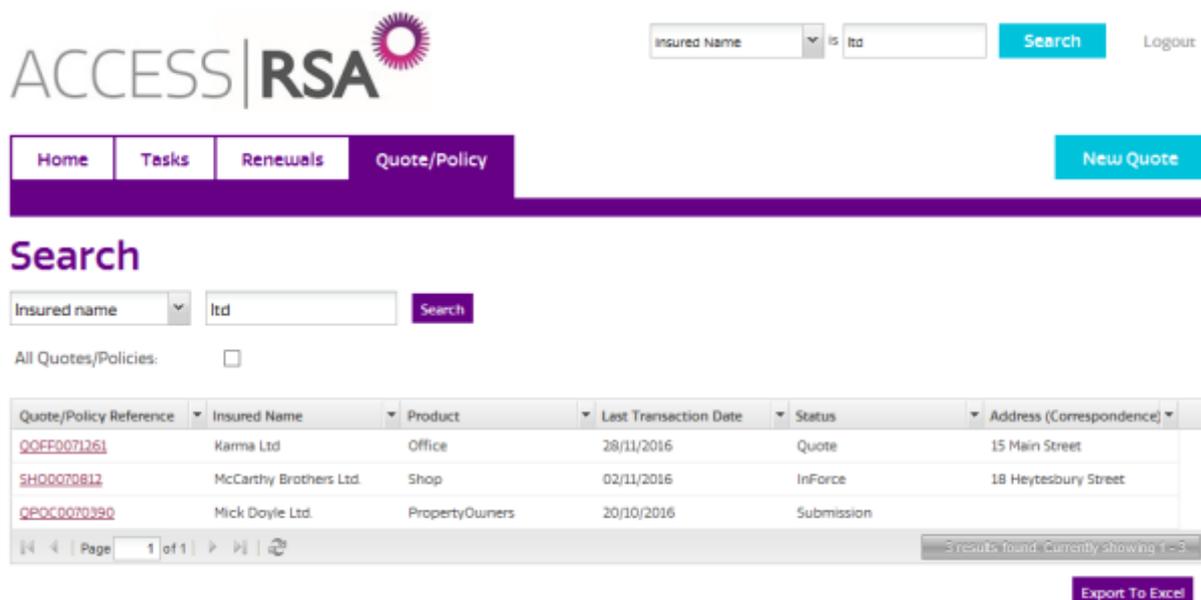


Quote/Policy Reference is [Search](#) [Logout](#)

- Quote/Policy Reference
- Insured Name
- Legacy Policy Number

In the top right corner of the page you will see the search box. Select what you want to search for from the drop down menu. For example, you can search by insured name. Enter the name or reference that you want to find for before clicking search.

You can find policies using their old Benchmark policy number by searching under “Legacy Policy Number”.



ACCESS | RSA  is [Search](#) [Logout](#)

[Home](#) [Tasks](#) [Renewals](#) [Quote/Policy](#) [New Quote](#)

Search

[Search](#)

All Quotes/Policies:

Quote/Policy Reference	Insured Name	Product	Last Transaction Date	Status	Address (Correspondence)
QOFF0071261	Karma Ltd	Office	28/11/2016	Quote	15 Main Street
SH00070812	McCarthy Brothers Ltd.	Shop	02/11/2016	InForce	18 Heytesbury Street
QP0C0070390	Mick Doyle Ltd.	PropertyOwners	20/10/2016	Submission	

Page 1 of 1 [Export To Excel](#)

3 results found. Currently showing 1 - 3

Access RSA also allows you to export your search results to Excel for ease of use. To do this click “Export to Excel” at the bottom of the page.

SYSTEM FUNCTIONALITY

GEOCODING

Risk Address

Building/Business Name

Address Line 1*

Address Line 2

Address Line 3

County/Postal District*

Access RSA uses Geocoding for risk addresses. Once you have entered an address, click "Find Address" and you will then be presented with options from An Post's national address directory.

A new window with the title "Geocoding" will appear and you should select the address that best matches the risk. If the address does not appear click "None of the above". Then click the select button to proceed.

Note that the risk address will appear as you have entered it on all policy documents.

Address List

Geocoding

*Required fields are marked by an asterisk **

Please select the closest match from the list below which is based on An Post's national address directory. This search is for geocoding purposes only and the text of the address will appear on policy documents as you have originally entered*

R.S.A. HOUSE, R. S. A. INSURANCE IRELAND LIMITED, DUNDRUM TOWN CENTRE

NONE OF THE ABOVE

SYSTEM FUNCTIONALITY

POLICY HISTORY

For every quote or policy you will be able to see a full history of all actions. This includes the name of the user, the date and time of the

Insured Name:
Runaway Enterprises
Ltd.

Quote/Policy Reference:
OFF0075476

Policy Navigation

Transactions

History

Documentation

Policy Tasks

History

Date	Created By	Quote/Policy Status	Audit Type	Audit Trail
17/01/2017 15:24	Amy Farrell	InForce : New Committed	Documentation Issued	To: afarrell@test.com From: afarrell@test.com Subject: OFF0075476 - Runaway Enterprises Ltd. Body: Hi John Smith Please see attached documents in respect of the above. Regards, Amy Farrell Documents: Cover Letter (NB), Statement of Fact, Schedule, LE - Small Medium Enterprises, Policy Booklet
17/01/2017 15:23	Amy Farrell	InForce : New Committed	E-mail Sent	Email sent to afarrell@test.com
17/01/2017 15:23	Amy Farrell	InForce : New Committed	Change to New Quote Status	Policy Committed
17/01/2017 15:23	Amy Farrell	InForce : New Committed	Task Status Change	Task completed by Amy Farrell
17/01/2017 15:21	Gavin Keane	Quote : New Approved	Change to New Quote Status	We don't require a DD mandate.
17/01/2017 15:20	Amy Farrell	Quote : New Referred	Change to New Quote Status	Rating Messages: 1. Legal Expenses cover requires review 2. Payment type selected requires review by underwriter I'd like to put this on DD. Is this possible?
17/01/2017 15:19	Gavin Keane	Quote : New Approved	Change to New Quote Status	No, there is no need to specify laptops. Automatic worldwide cover is provided on this product.
17/01/2017 15:17	Amy Farrell	Quote : New Referred	Change to New Quote Status	Rating Messages: 1. Legal Expenses cover requires review The insured has 4 laptops. Do these need to be specified on this policy?

EXPANDABLE SECTIONS

In order to make the system as easy as possible to navigate, some optional fields are minimised by default.

For example, under "Property Damage" the fields for "Specified Items" have been minimised.

If the hidden section is relevant to the risk, simply click the arrows () to expand the section and enter the information.

Property Damage

Buildings 

Do you require buildings cover? Yes No

Buildings Sum Insured (€)* 1,000,000

Year of Construction* 1900 or later 

Additional Buildings Sum Insured (€) 50,000

Description* Outbuildings 

[Add another Buildings Item](#)

Are you the sole occupier of the building? Yes No

Specified Items 

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MAKING THINGS
BETTER, TOGETHER

CONTACT US

RSA Online Services Team
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