



## **Portal**

### **System User's Guide (External)**

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## General Information

The North Carolina Rate Bureau (NCRB), the North Carolina Reinsurance Facility (NCRF) and the North Carolina Insurance Guaranty Association (NCIGA) have implemented a web security portal, hereinafter referred to as the Portal, by which all users must enter a user id and password to access secured applications and data. The Portal is a self-service tool that allows users to submit a request for a new account, to change a password and to request a forgotten password.

Administrators will have access to a Web Administration application that will allow them to maintain user demographic information, administer security for applications and data and execute system reports. Users will not be able to access an application on the Portal unless they have been granted access by an administrator using the Web Administration application.

## About This Guide

This User's Guide contains features, functions, and step-by-step instructions on how to use the Portal application. This User's Guide will enable you to:

- Request a New Web Account
- Login to the Portal
- Change your Password
- Request a Forgotten Password
- Request Access and Launch an Application

*NOTE: See the Web Security User Guide – External Admin.doc for instructions on how to use the Web Administration application.*

## NCRB, NCRF and NCIGA Information Center

If at any time during these procedures you need assistance, you may contact the NCRB, NCRF and NCIGA Information Center at:

Phone: 919-582-1056

Fax: 919-783-7467

E-mail: [help@ncrb.org](mailto:help@ncrb.org)

## Browser Specifications

A browser is a program that allows you to access pages on the World Wide Web. The Portal and Web Administration applications were developed to specifically take advantage of features available within **Internet Explorer 8.0** or higher. Other browsers, such as FireFox and Netscape, are not supported at this time.

You can download the latest version of Internet Explorer, free of charge, at <http://www.microsoft.com/windows/ie/downloads/default.msp>.



## Cookies

A cookie is a text-only string that gets entered into the memory of your browser. If the lifetime of this value is set to be longer than the time you spend at a site, this string is saved for future reference.

A **standard cookie** is written to the user's hard drive and is used to remember the user the next time the user visits the site. A **session cookie** resides in the Web browser's memory and only retains information until all user browsers are closed and the session is thus ended.

The NCRB Web site uses **session** cookies. The NCRB Web site does not write any data to the user's hard drive. The exception to this is if a user selects to download a file from one of the applications.

## Spawning New Windows

Some pages on the NCRB Web site spawn a window (open a new browser window) when they are accessed. For example, when you view a report, you are spawning a new window. Remember to close the new window whenever you want to exit it and return to where you were in the NCRB Web site.

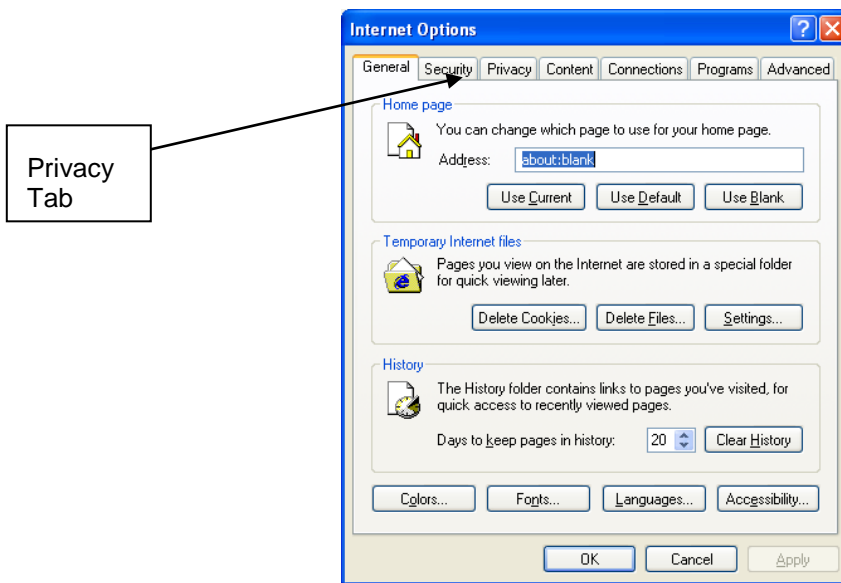
## Pop-up Blockers

If you have a pop-up blocker installed, you will need to allow pop-ups from the NCRB Web site. If you do not have a pop-up blocker installed, you can skip to the next section.

To allow pop-ups from the NCRB Web site using **Internet Explorer 8.0**, follow these procedures:

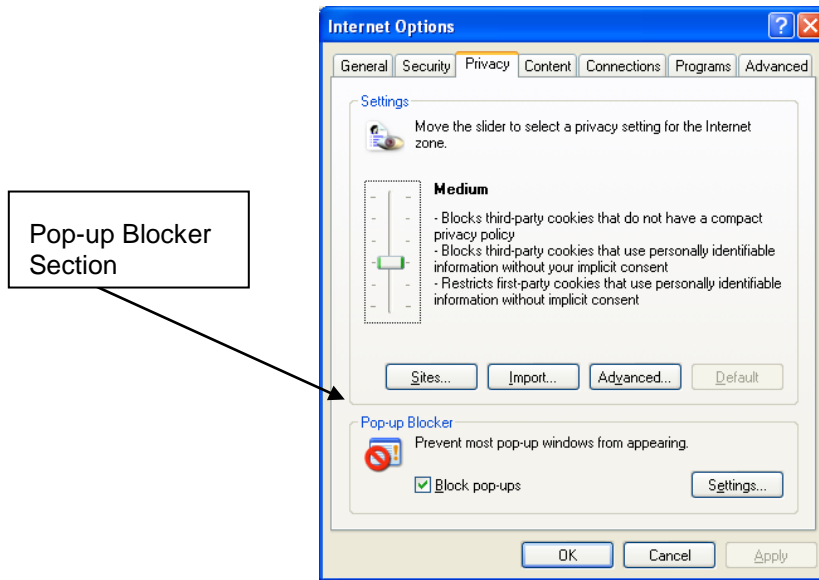
- Step 1.** On the Internet Explorer main menu, select **TOOLS** and then **INTERNET OPTIONS**. The Internet Options window displays.
- Step 2.** Click the **PRIVACY** tab. The Privacy tab information displays.

**Figure 1-1 – Internet Explorer 8.0 Internet Options window**



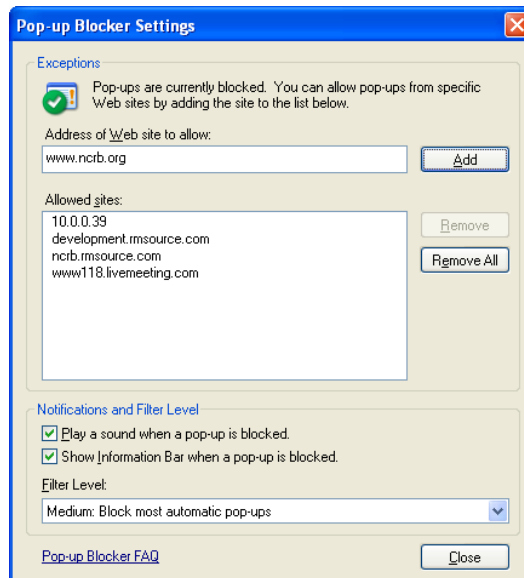
- Step 3.** In the Pop-up Blocker section, click the **SETTINGS** button. The Pop-up Block Settings window displays.

**Figure 1-2: Internet Options Privacy Tab**



**Step 4.** Enter *www.ncrb.org* in the **Address of Web site to allow** text box and click **ADD**. *www.ncrb.org* is added to the Allowed sites list box. Click **CLOSE** to close this window.

**Figure 1-3: Pop-up Blocker Settings Window**

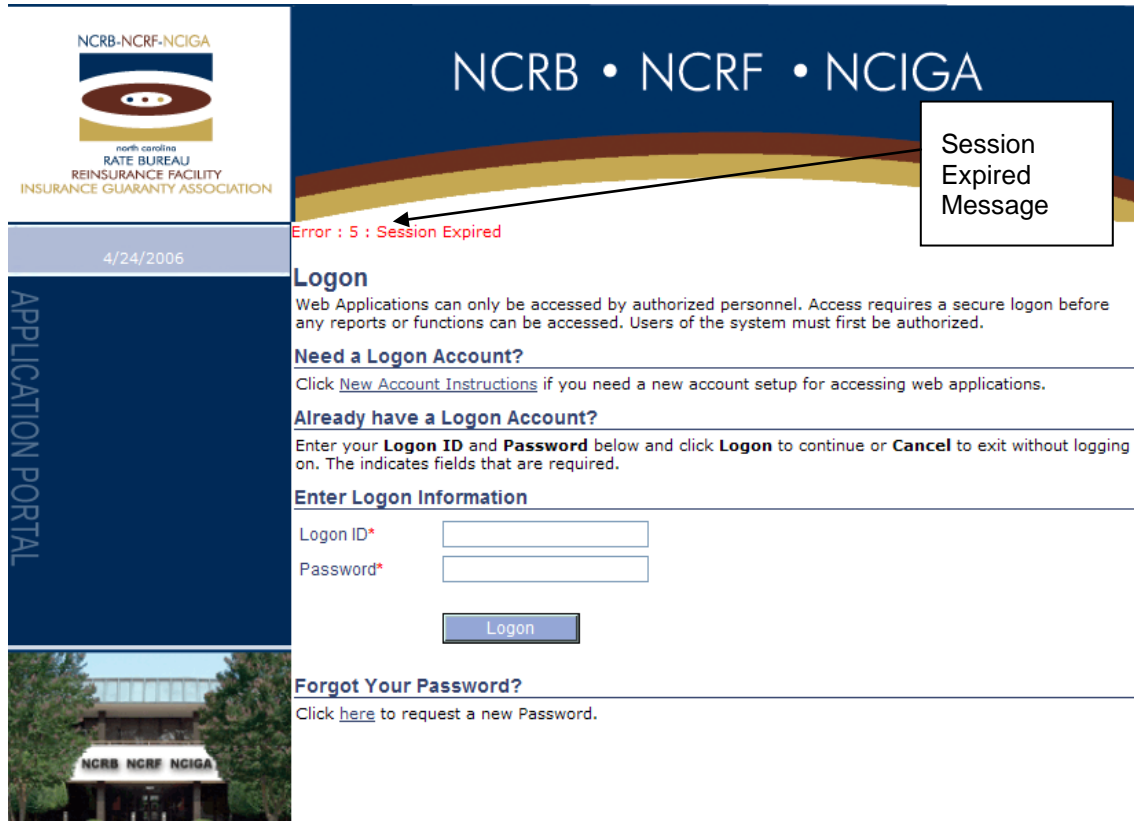


**Step 5.** Click **OK** to exit the **Internet Options** window.

## System Timeout

The System times out after it has been inactive for sixty minutes or more. The following message displays, informing you to re-log into the System.

Figure 1-4: Session Expired Page



## Accessing and Using the Portal

This module contains information and procedures on accessing the Portal and using the Portal features.

### View the NCRB, NCRF and NCIGA Home Page

The NCRB, NCRF and NCIGA home page is a public Web site page that allows users to view general information. To access the home page, use the following procedure:

- Step 1.** Type the following URL into your browser's address bar: [www.ncrb.org](http://www.ncrb.org) and press the ENTER key.

Figure 1-5: NCRB, NCRF and NCIGA Web Site Home Page





## Who is your Master Web Administrator (MWA) or Web Administrator (WA)?

The Web Administration application provides the NCRB, NCRF and NCIGA the ability to delegate user administration to its member companies, agencies, premium finance companies and vendors. These delegated administrators are referred to as the Master Web Administrator (MWA) for a company. One MWA will be set up for each company, agency, premium finance company or vendor that would like to conduct business with the NCRB, NCRF and/or NCIGA. Once a MWA account has been created, the MWA will have the ability to maintain user accounts and security access.

If you do not know if your company has a Master Web Administrator or a Web Administrator, contact the NCRB, NCRF and NCIGA Information Center for assistance.

## Request a New Logon ID

In order for you to log into the Portal, you must have an active user id and password. A company's MWA is responsible for creating and disabling user accounts for their company. The **Group Administrator Web Account Registration Form** provides the ability for a company to request creation of a MWA account.

If you do not have a MWA already set up for your company, follow these procedures:

- Step 1.** Click the **NCRB** menu on the NCRB, NCRF, NCIGA Home page. You are navigated to the NCRB home page.
- Step 2.** On the right hand side of the page in the Member Services area, click the **New Account Signup - [Instructions](#)** hyperlink. Read through the contents and click the Group Admin Application hyperlink for either Insurance Agents, Agencies and Premium Finance Companies or Member Insurance Companies based upon your company type. The Group Administrator Web Account Registration page is displayed.
- Step 4.** Complete the online registration form, filling in the required information, and click Submit. Once the MWA account is created, the MWA will receive an e-mail notification indicating that the account is activated.

## Log in to the Portal

The Portal will provide access to all of the secured applications and data on the NCRB, NCRF and NCIGA Web site. To log in to the Portal, use the following procedure. (You must use the valid user name and password that were provided to you.)

- Step 1.** In the Member Services section of the NCRB website, , click the Login hyperlink. The **PORTAL LOGON** page displays.

**Figure 1-8: Portal Logon page**

- Step 2.** Enter your Logon ID and password. Click the **LOGON** button. The **PORTAL HOME** page displays.

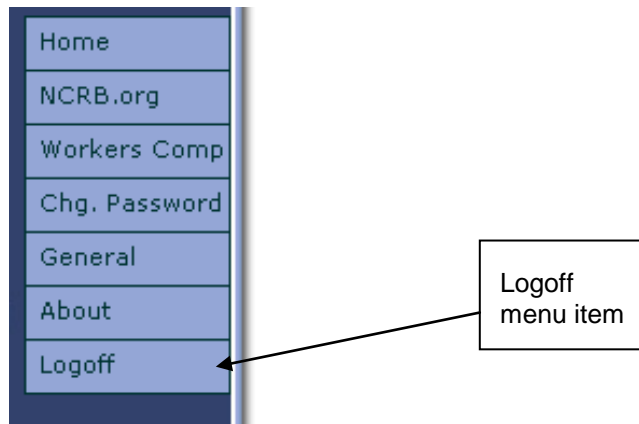
**Note:** If you enter an incorrect user name or password, the system will return an error message to inform you of the invalid data. Re-enter your user name and password correctly, and click the **SUBMIT** button to enter the system.

## Log off of the Portal

To log off from the Portal, click the **LOGOFF** menu item in the Portal.

**Note:** You may also log off of the system by closing your browser window.

**Figure 1-9: Portal Home Menu List**

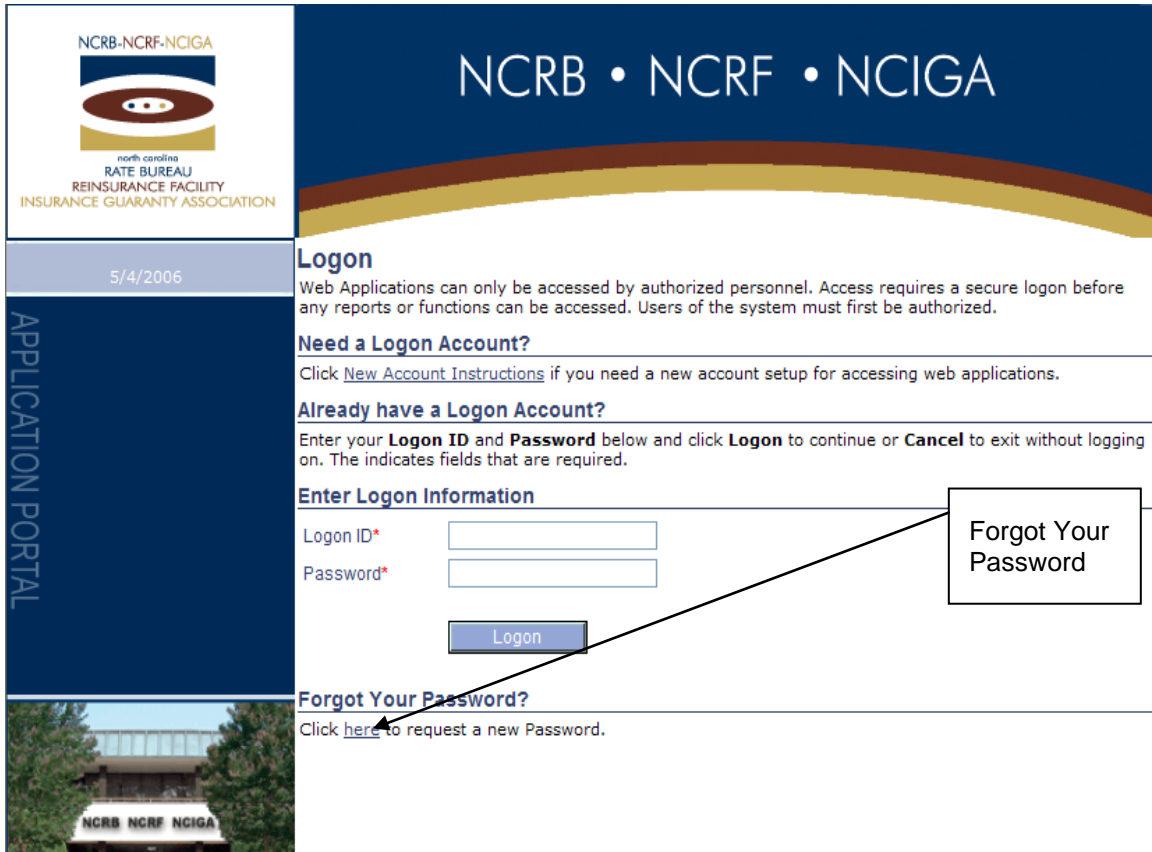


## Obtain a Forgotten Password

If you have forgotten your password, you can request a new password by entering your Logon ID and E-mail address. To obtain a new password to gain entry into the Portal, use the following procedures:

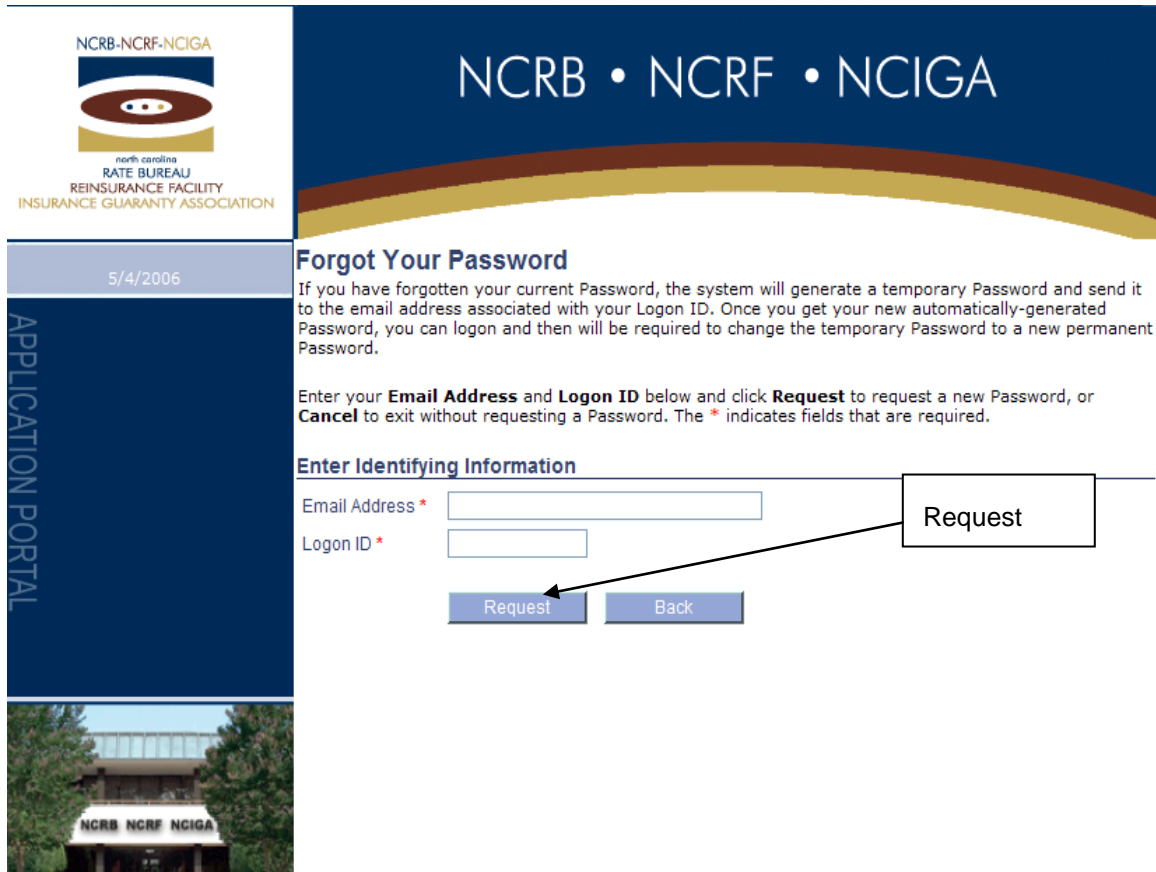
- Step 1.** On the **PORTAL LOGIN** page, click the link in the Forgot Your Password section of the page. The **FORGOT YOUR PASSWORD** page displays.

**Figure 1-10: Portal Login Page, Forgot Your Password Link**



- Step 2.** Enter your **Email Address** and **Logon ID**.
- Step 3.** Click the **REQUEST** button. An e-mail containing your new password will be sent to your e-mail address.

**Figure 1-11: Forgot Your Password Page**



**Note:** Your password is stored encrypted and the system is unable to e-mail your original password. As a result, a new password is created during this process. Log into the Portal with the password that is contained in the e-mail you receive. You will be required to change your password when you log on with the new password.

**Note:** If you have forgotten **both** your Logon ID and your password, you must contact your MWA. Your MWA has the ability to re-set your password. If you are the MWA and have forgotten your Logon ID and your password, contact the NCRB, NCRF and NCIGA Information Center.

- Step 3a.** Click the **BACK** button to return to the Portal home page.

## Change Your Password

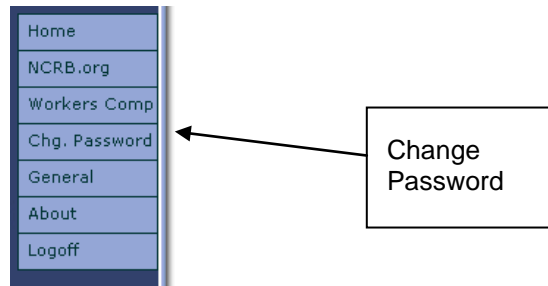
There are numerous reasons why you may need to change your password to enter the Portal. Here are several examples of situations that require a password change:

- Personnel changes
- Someone else has obtained access to your password
- You were forced to change a similar password on a different site and you would like to keep them in sync.

To change your password, follow these procedures:

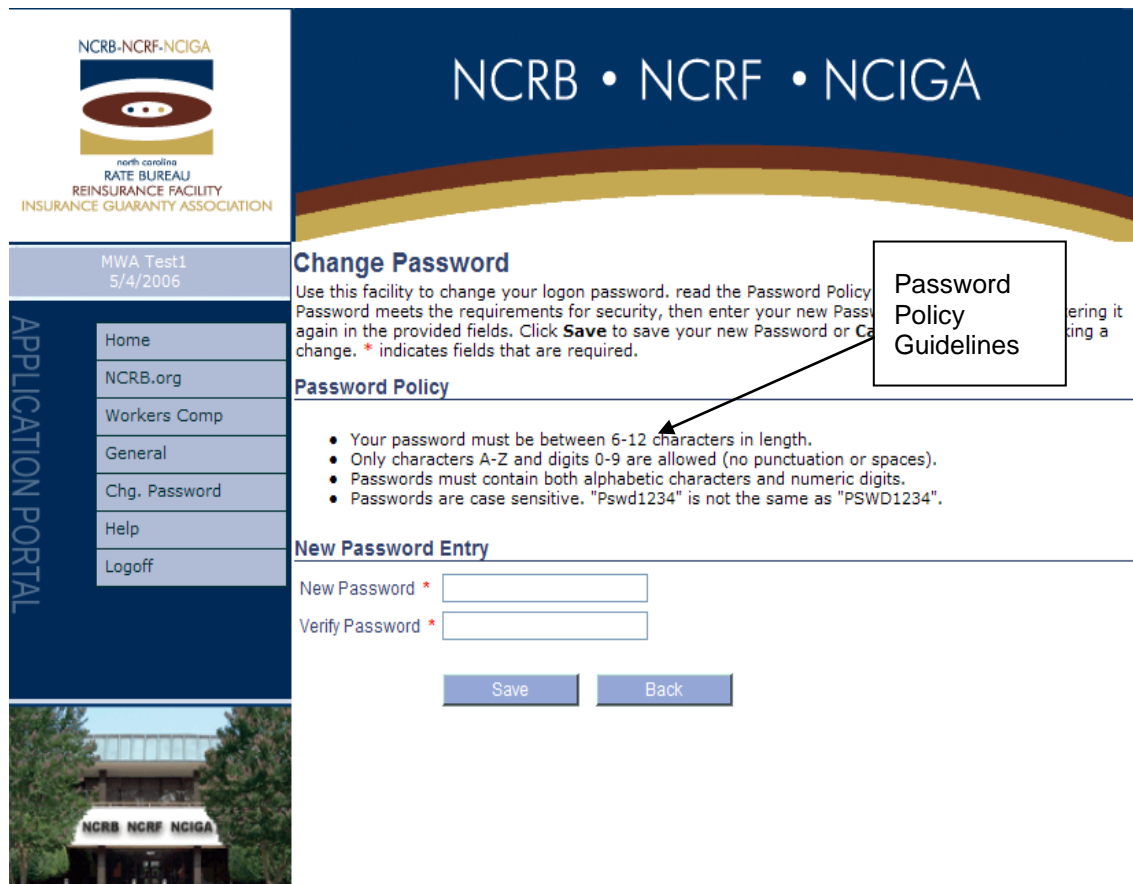
**Step 1.** On the **PORTAL HOME** page, click the **CHG. PASSWORD** menu item. The **CHANGE PASSWORD** page displays.

**Figure 1-12: Portal Home Page Menu Items**



**Step 2.** Enter your new password in the **NEW PASSWORD** and **VERIFY PASSWORD** text boxes and click **SAVE**. Your password is changed and you are redirected back to the **PORTAL HOME** page. You will be required to use the new password the next time that you log onto the Portal.

**Figure 1-13: Change Password page**



**Note:** If you entered a password that does not fulfill the NCRB, NCRF and NCIGA's Password Policies, you will receive a message indicating that your password does not comply. Enter a different password using the instructions in the Password Policy section as a guide.

**Step 2a.** Click the **BACK** button. Your password is not changed and you are re-directed back to the **PORTAL HOME** page.

## Change Your Logon ID

There are only two reasons why a user should request a change to their Logon ID:

- the user's logon id was created incorrectly
- the user has changed their name and the logon id should reflect their name change

Only administrators of the system can change your Logon ID. Your MWA has the ability to correct the logon id if the account was created within the last 24 hours. If the account was created more than 24 hours in the past, then your MWA must contact the NCRB, NCRF and NCIGA Information Center to have the Logon ID changed.

## Launching an Application

The Portal is the common place from which all secured applications are accessed on the NCRB, NCRF and NCIGA Web site. You will only see applications you have been authorized to access. All of the applications are categorized based upon the business unit that the application represents. To launch an application, follow these procedures:

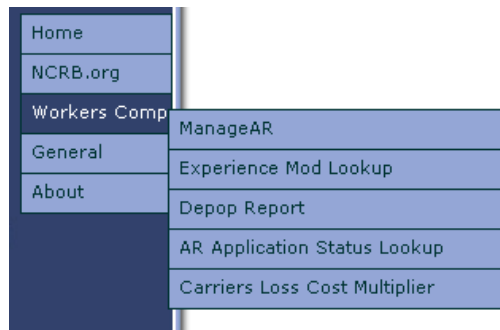
- Step 1.** Click the **BUSINESS UNIT** menu item on the left hand navigation menu that pertains to the application that you would like to use. For non-specific business unit applications, click the **GENERAL** menu item.

**Figure 1-14: Portal Menu Items**



- Step 2.** Click the **APPLICATION NAME** menu item that appears to the right of the Business Unit menu item. The application page displays.

**Figure 1-15: Portal Application Name Menu Items**



## Request Access to an Application

If you know of an application that exists on the NCRB, NCRF and NCIGA web site, but you do not see it in your list of applications on the Portal, then your Logon ID does not have access to the application. To request access, you must contact your MWA or WA.