Organisation & Branch Admin User Guide

This guide is for Organisation & Branch Admins to introduce Navigate.

Contents

1 Logging in

Navigate is the MIB's new data platform and will hold data from the Motor Insurance Database (MID) and, later in the year, the Motor Insurance Anti-Fraud and Theft Register (MIAFTR).

Once your organisation has been set up in Navigate and you've been added as a user, you'll receive an email which will enable you to set-up your credentials. You'll need to whitelist the following email: noreply@identity.mib.org.uk

Welcome to MIB Services

Dear MIB,

Thank you for registering to use MIB Services. A user account has been created for you using the following email.

Click the following link to activate your account:

Activate MIB Account

If you have already activated your account, login here.

If you experience difficulties accessing your account, you can send a help request using the following link and click on Request help on the page: https://www.mib.org.uk/contact-us/

Please note this is an automated message from the MIB. Replies to this email address are not monitored or answered.

Click on the 'Activate MIB Account'. Your username will be your email address, you'll need to set a password and answer a security question. **It's important you remember the answer to your security question as you'll be asked to provide this from time to time.**

Create a password for your account

Create a password so you can login to your account.

Password must have

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol (" ! # $ % & ' ( ) * + , - . / : ; < = > ? @ [ ] ^ _ ` { | } ~)
- Not contain either your name or your last name
- Not to be one of your previous 4 passwords

Enter password *

Show Password

Confirm password *

Show Password

Choose a memorable question and answer so you can login to your account if you forget your password.

Select a security question *

Select security question

Security answer *

Continue

You'll need to set up 2-step authentication. Once completed you'll gain access to Navigate. Two-factor authentication is required should you forget your password, or need to reset your account, this enables Navigate to verify who you are. 2-step authentication will be required every 28 days. A verification code text will be sent to a nominated mobile number. Password can be used after that for 28 days if logging in from the same device.

Register for 2-step authentication

To secure your account, we need to setup multi factor authentication and you will need to provide your mobile phone number.

You will receive a verification (SMS) with a 6 digit code that you will need to verify on the next screen.

Country code *

United Kingdom

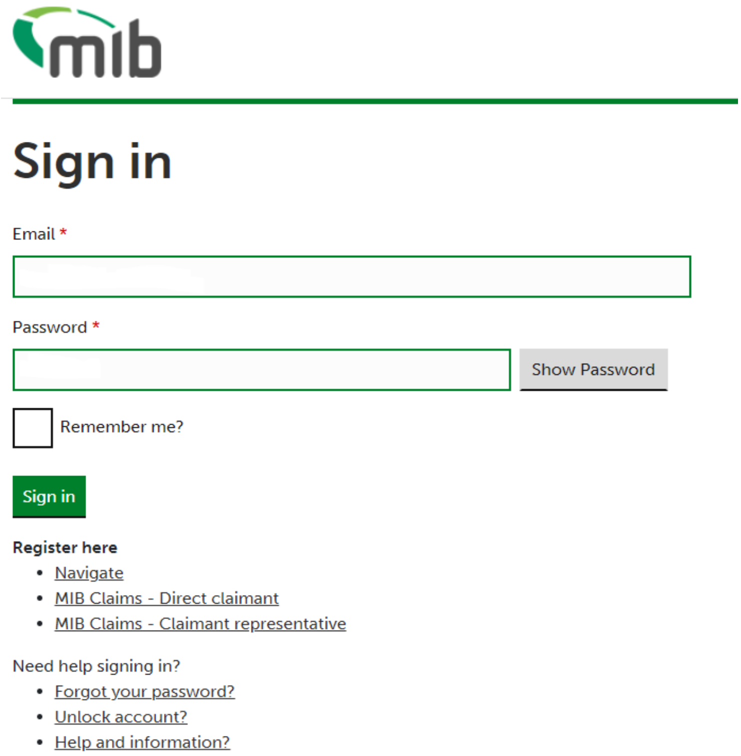
Mobile number *

+44

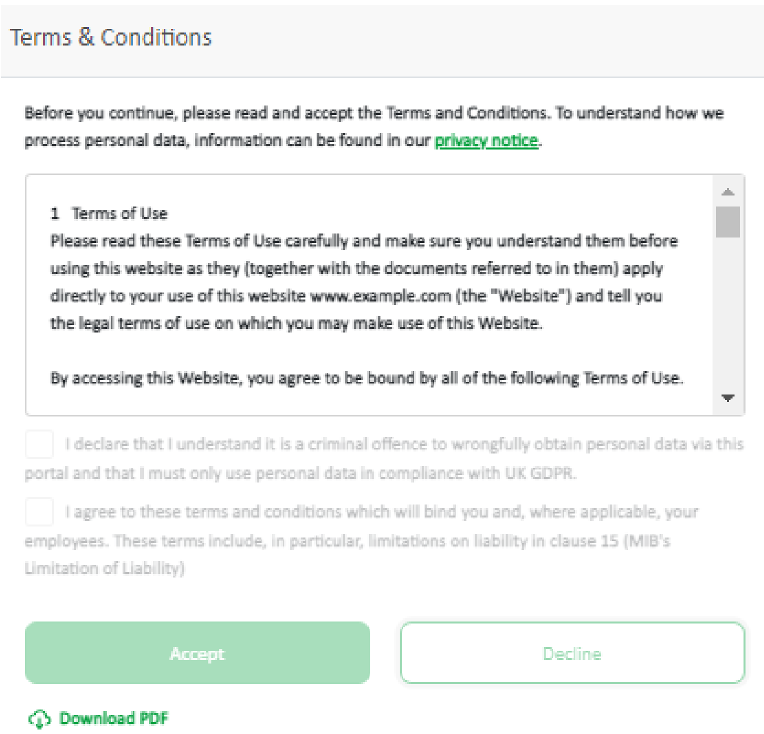
Send code

Exit

Once activated and registered, use the following URL: **Navigate** (https://identity.mib.org.uk/user/login) and enter your email address and password, then click “Sign in”:

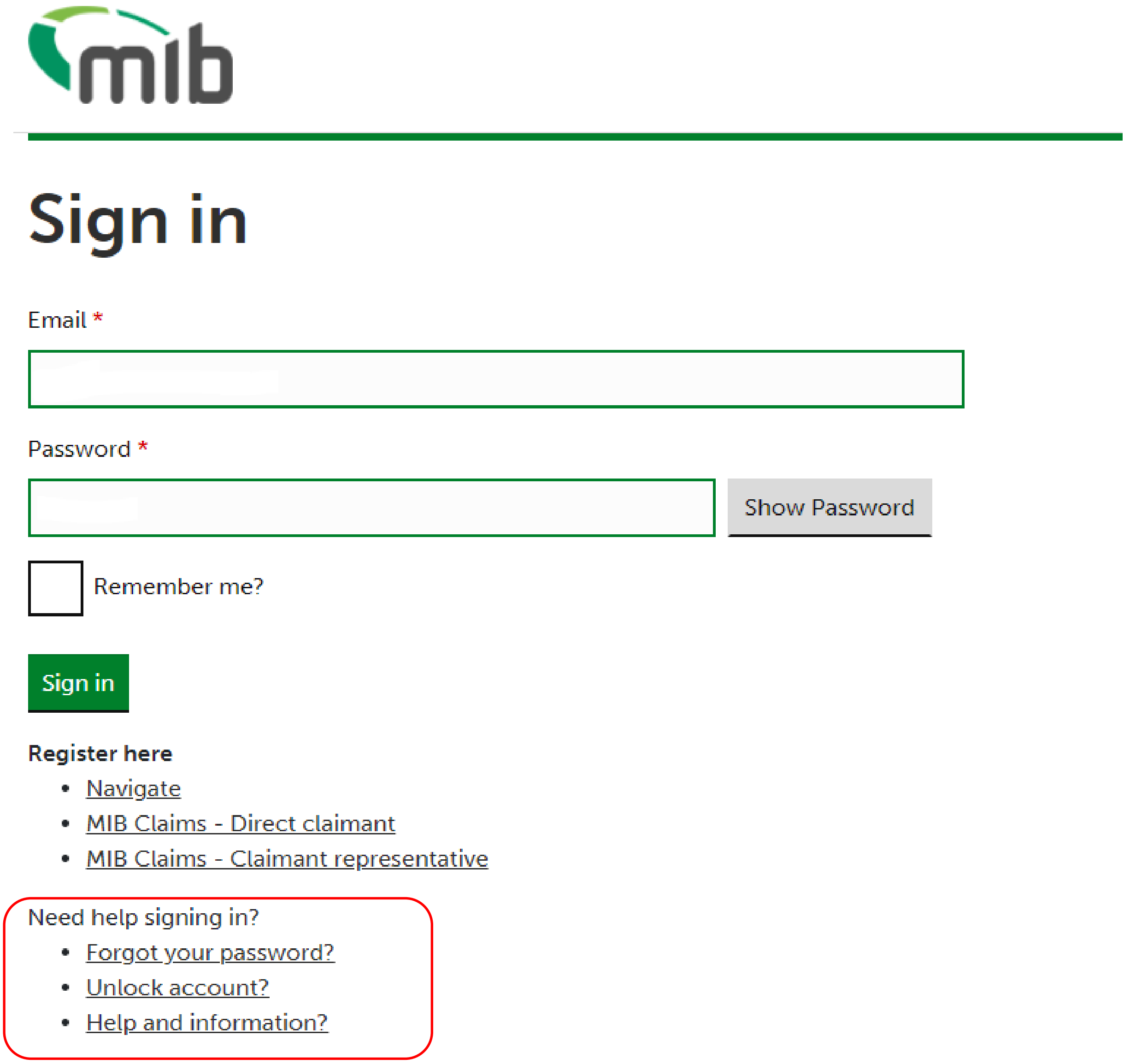


You’ll be required to accept the Terms & Conditions. To do this, scroll through the document in the box which will enable the tick boxes and ‘Accept’ and ‘Decline’ buttons:



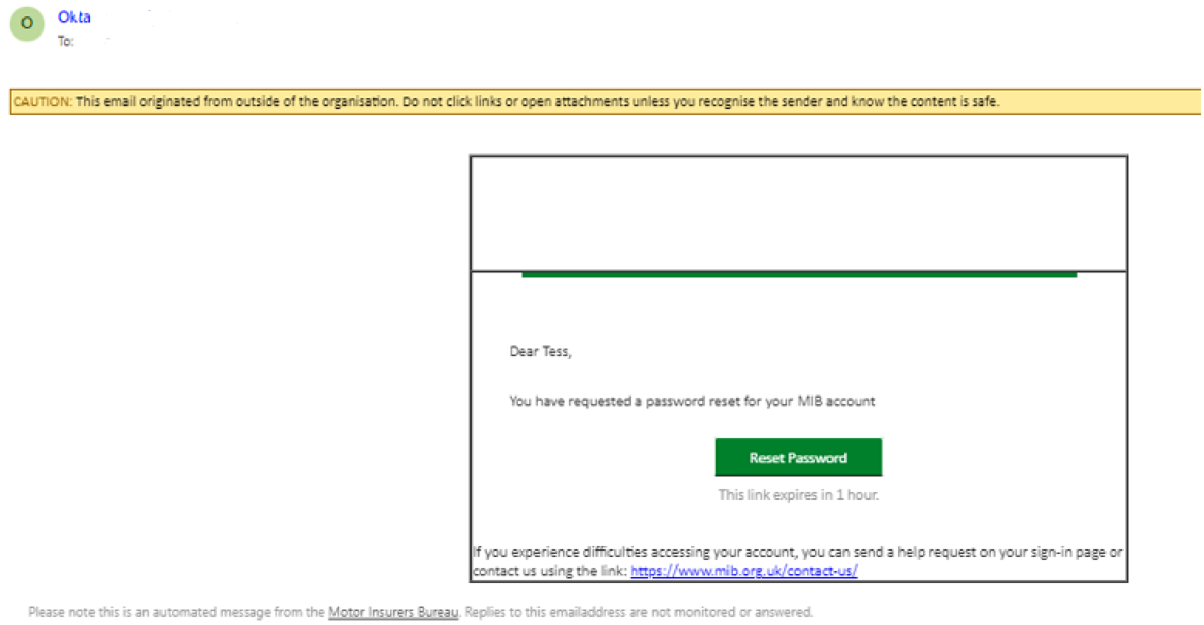
2 Forgot/Change password

If you've forgotten your log in details, locate the 'Need help signing in?' section on the Navigate log in home page. Here you'll be able to select forgot password, unlock account or if you require further help and information.

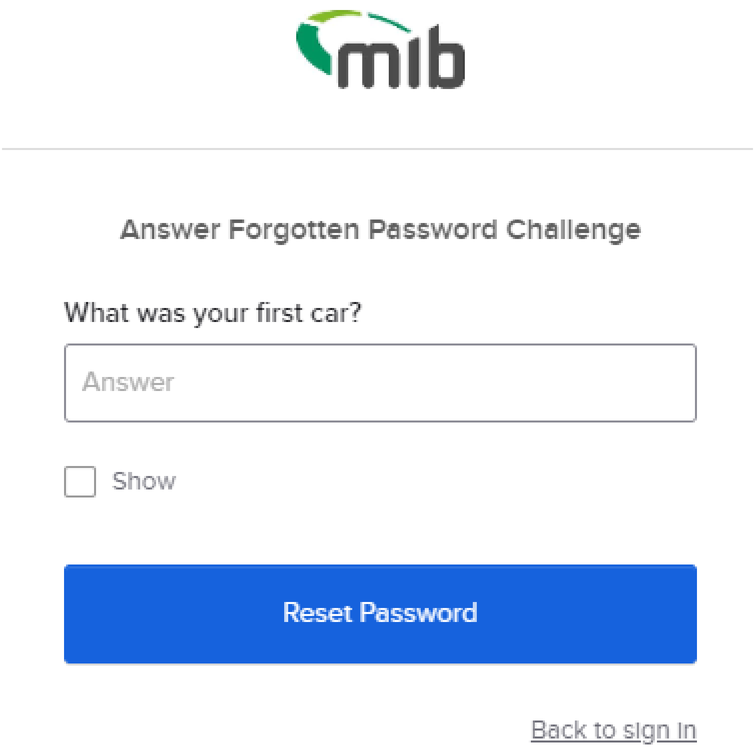


You'll be requested to provide your email address which was used when your account was set up.

Follow the link in your email:



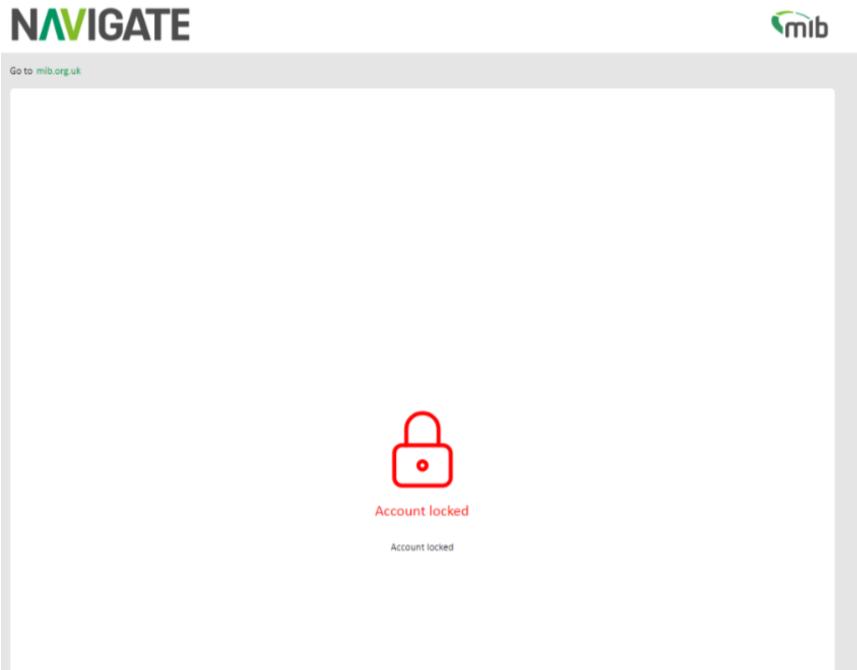
Then answer your security question you provided when you registered.



2.1 Locked out

If you do not use your account within 90 days, your account will become locked. After 180 days, your account will be deleted.

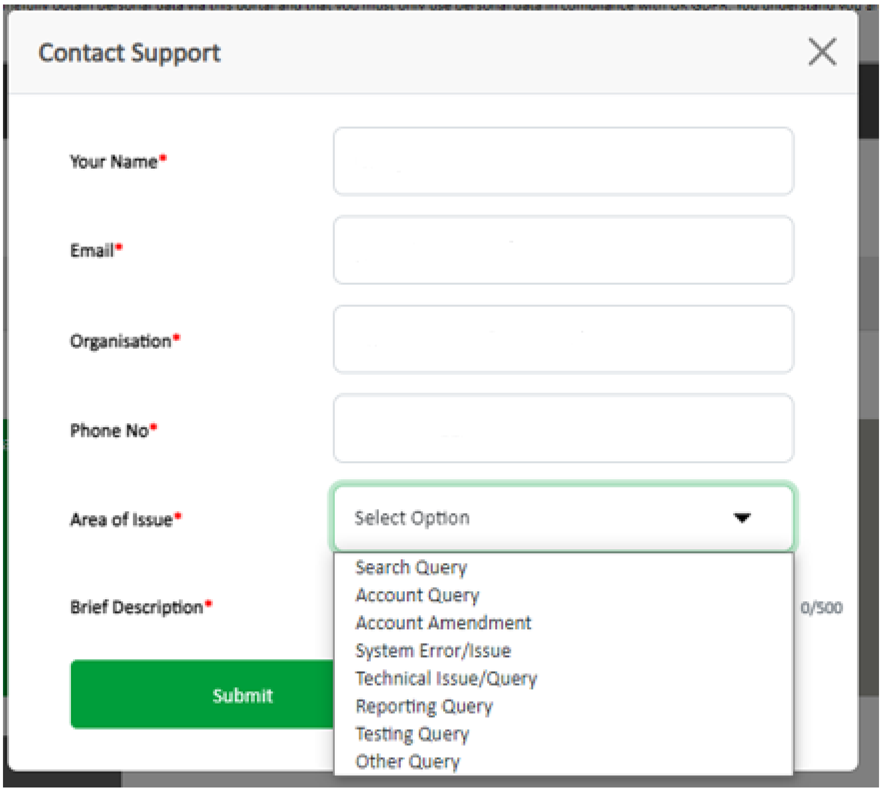
If you've been locked, or suspended from using the portal, you'll be notified to that affect.



3 Navigate Portal Help

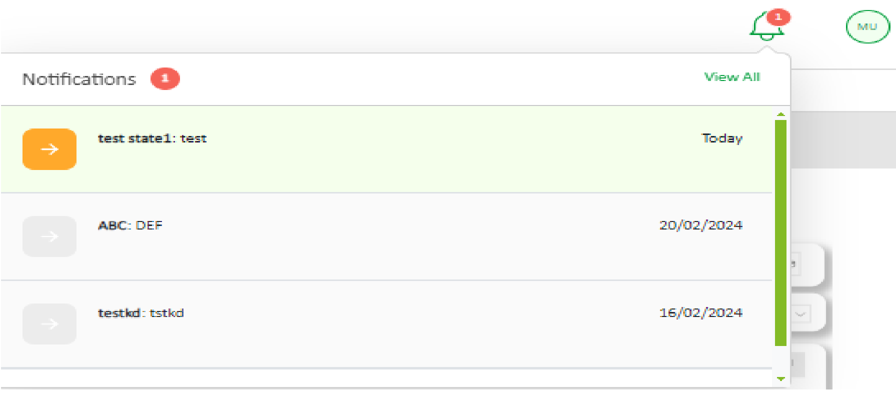
Navigate will have two forms of help. One is the Help Centre, located on the bottom right-hand side of the page:

Contact support will request you to enter your details, if not already populated and allows you to submit a general request for help and a brief description. A response will be provided by the Navigate team.



The Help Centre will allow you to access a Frequently Asked Questions page including useful information and guides.

You'll also be provided with a notification bell, where useful updates will be sent to your organisation to keep you informed about updates/changes or issues.

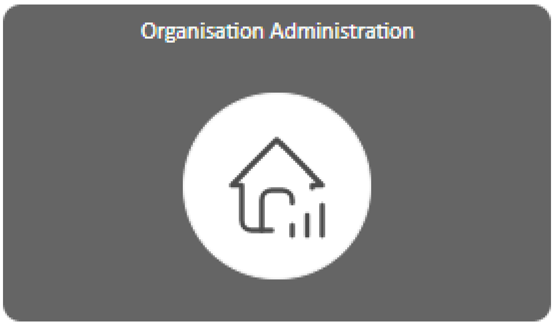


4 Organisation & Branch Administration Overview

If you're an Organisation Administration (Org Admin) user, you'll have access to view all of your organisation details including contacts within your org, view and download all documents signed by your org. Create, view, edit and manage all branches. Add, edit and manage users within your org or branches.

If you're a Branch Admin user, you'll be able to view all of your organisation's details including contacts, view and filter on branches within your organisation, and edit the branch info you're branch admin. Add, edit and manage users within your branch, and view all users within the organisation.

Click on the tile from the home page.

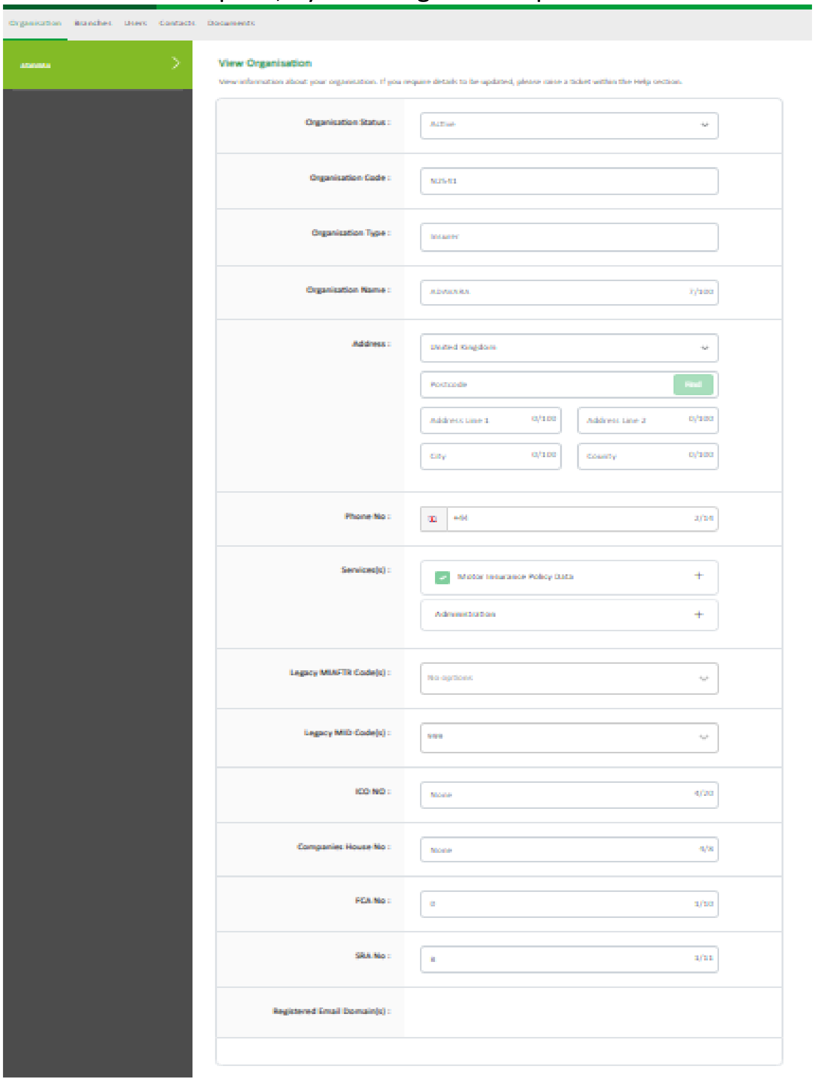


View organisation & branches

You'll be able to see details about your organisation and create, edit and manage branches.

5 View Organisation

Here you'll see the details about your organisation. If you require your details to be amended, you'll need to raise a request, by selecting the "Help" icon at the bottom right of the page.



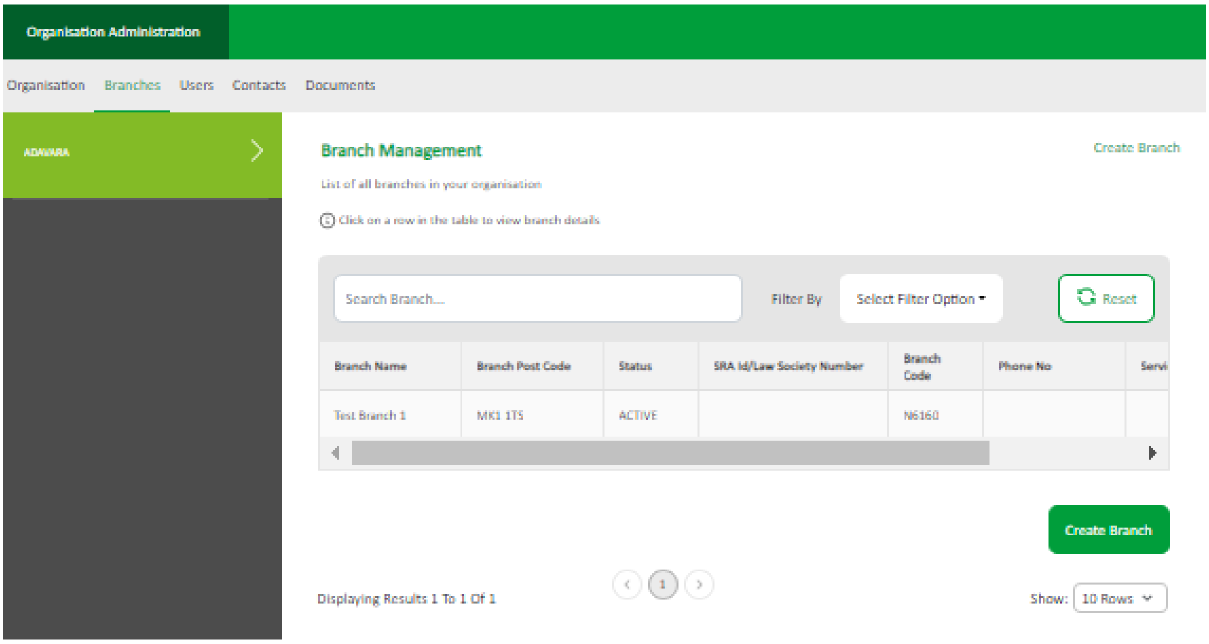
5.1 Create Branch

Depending on your organisation type, you may need to create branches. Branches is a term that can refer to as groups, departments, teams or branch locations within your organisation.

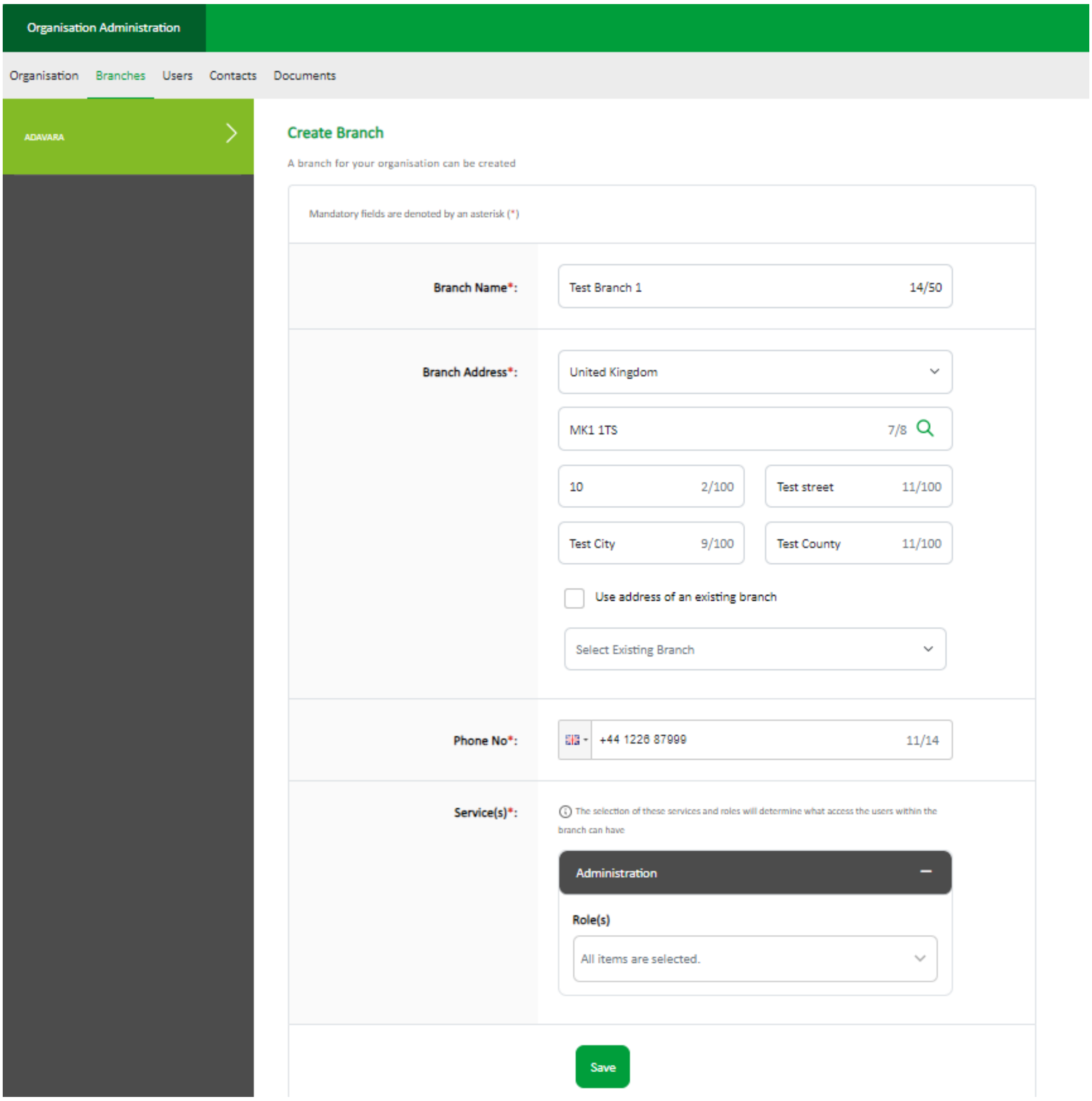
Once in the Organisation Administration application, you'll see options to choose different tasks. To create a branch, select the "Branches" tab.

You'll be presented with a table which will show a list of the branches. When the table is empty, your organisation does not have any branches.

Click "Create Branch" button, located at the top or bottom of the page.



You'll now be taken to a new screen, here you'll be able to enter all the relevant information about this branch.



Types of services you can include when setting up a new branch:

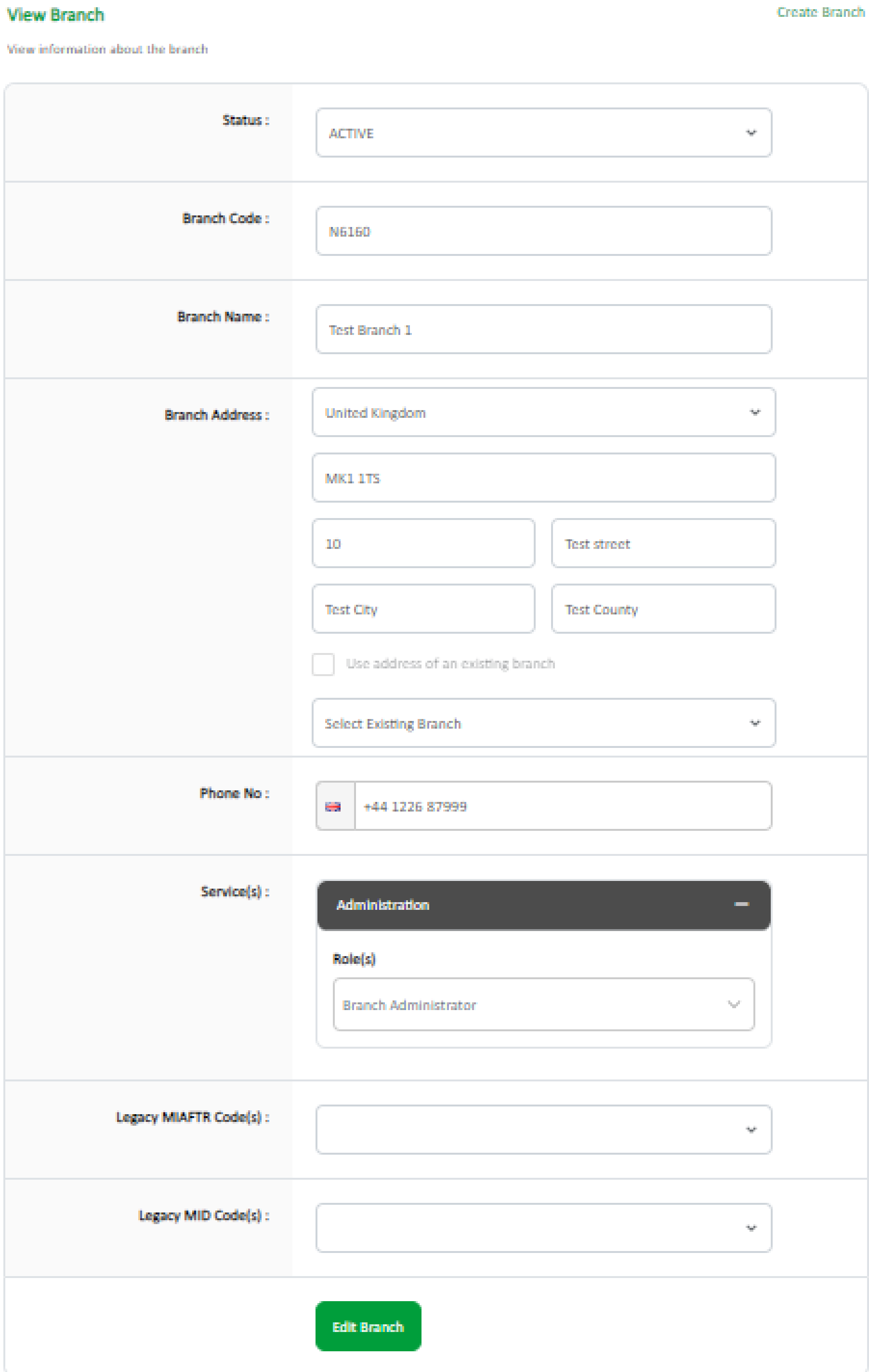
- Administration
- Motor Insurance Policy Data
- Vehicle Salvage & Theft Data

Within this, you'll be able to select what roles within the service applications that branch can have.

A list of roles can be found in the appendices.

5.2 View/Edit Branch

Once a branch has been created, you'll be able to view the details provided, should you need to edit any of the details. Press the "Edit Branch" button at the bottom of the screen.



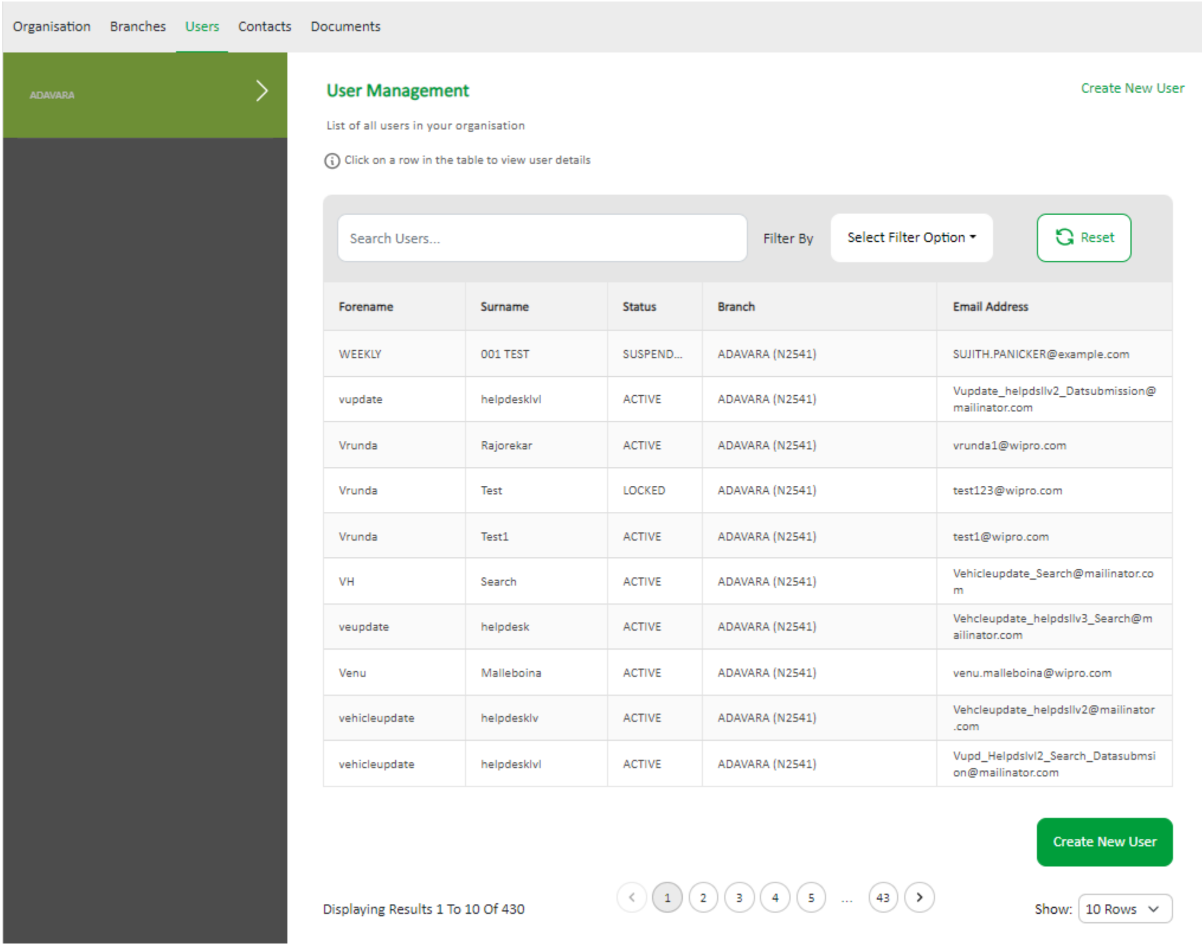
From here, it'll take you to an editable page where you can make your amendments, such as adding additional services, suspending a branch, or updating contact details. Press "Save", and your changes will have been saved.

User Management

Where you can create, view and manage users.

6 View Users

Select the “Users” tab to find a list of all your users within your organisation. You’ll be able to search for users by their name or filter by Status or Branch.

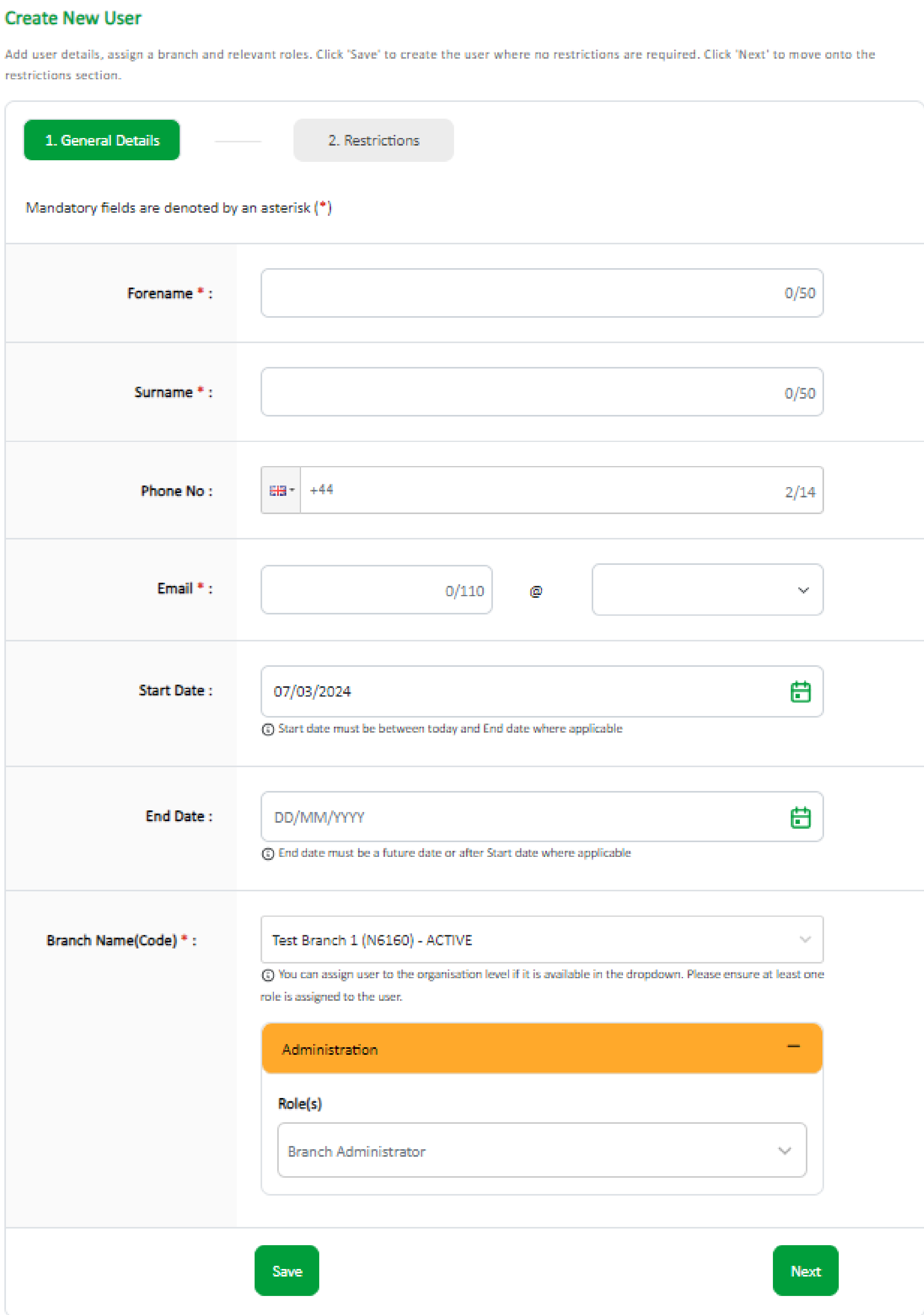


If no users are found, a warning will be displayed to advise.

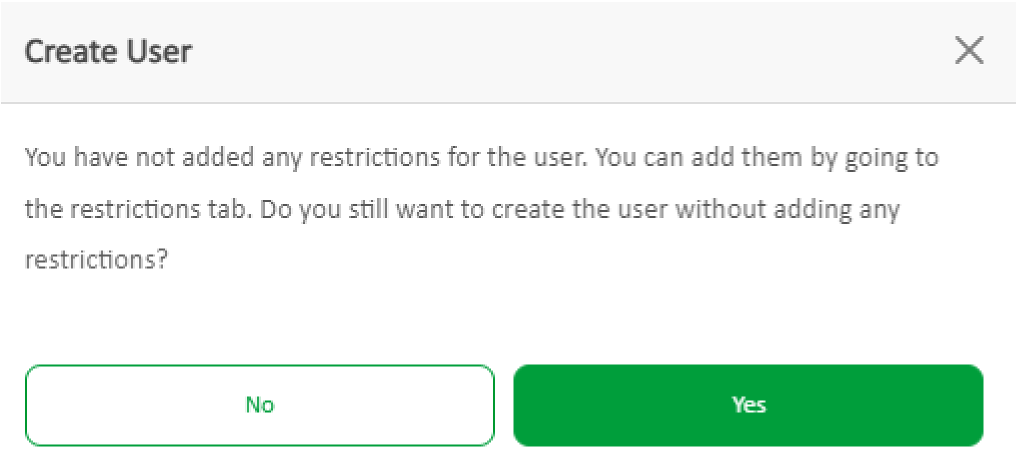
6.1 Create Users

For your organisation to carry out the relevant tasks you’ll need to be able to create users. Select the “Create New User” button at the top or bottom of the page.

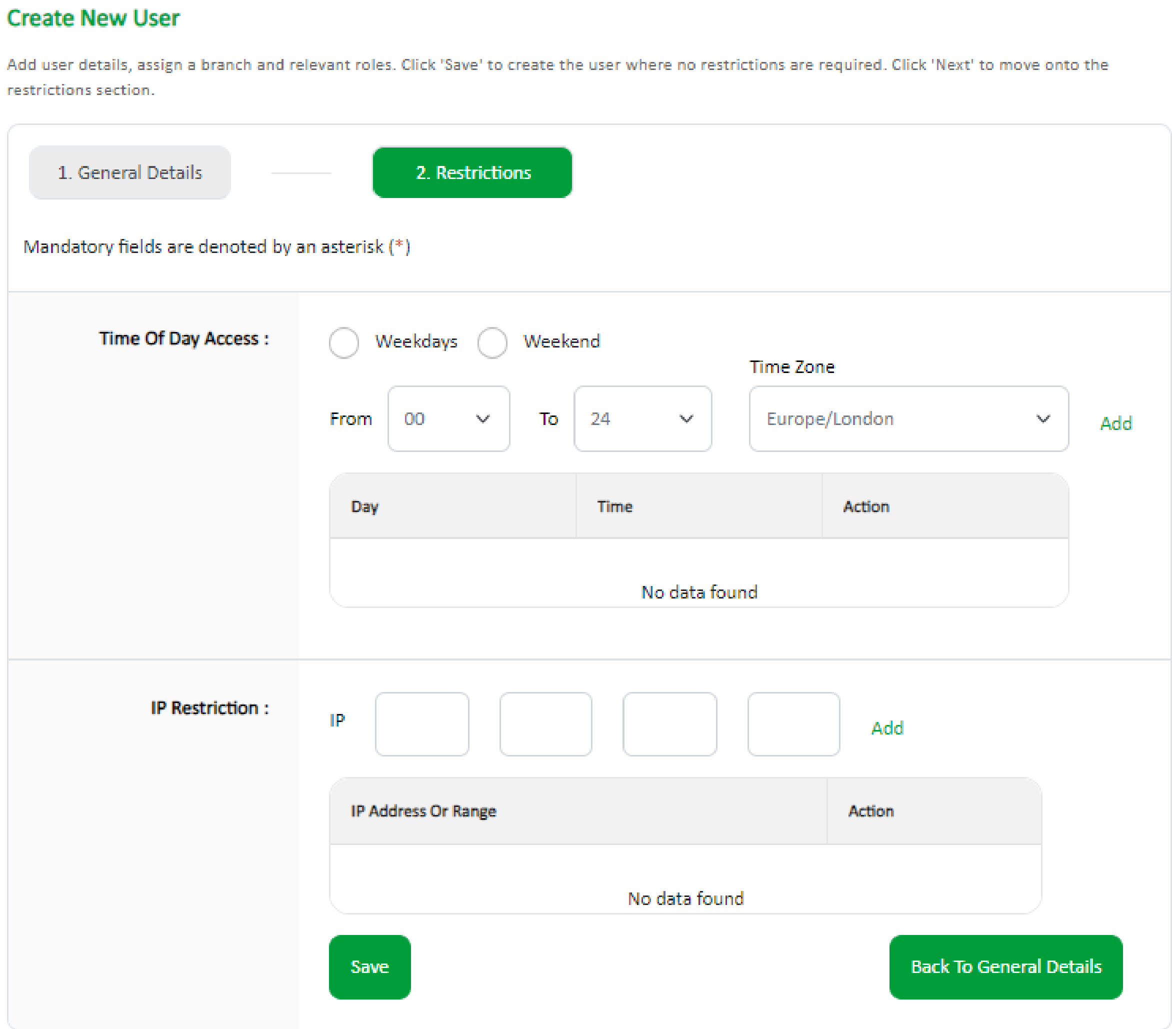
A new screen will open and you’ll need to fill out the users’ details, select which branch you want them set up for and choose their required role.



By selecting “Save” you’ll be able to create a user, however they will not have any restrictions. An additional pop-up message will be displayed to notify you of this.



If you want to set restrictions up for the user, select “Next” and provide the relevant details. Click “Save” and your user will be created.



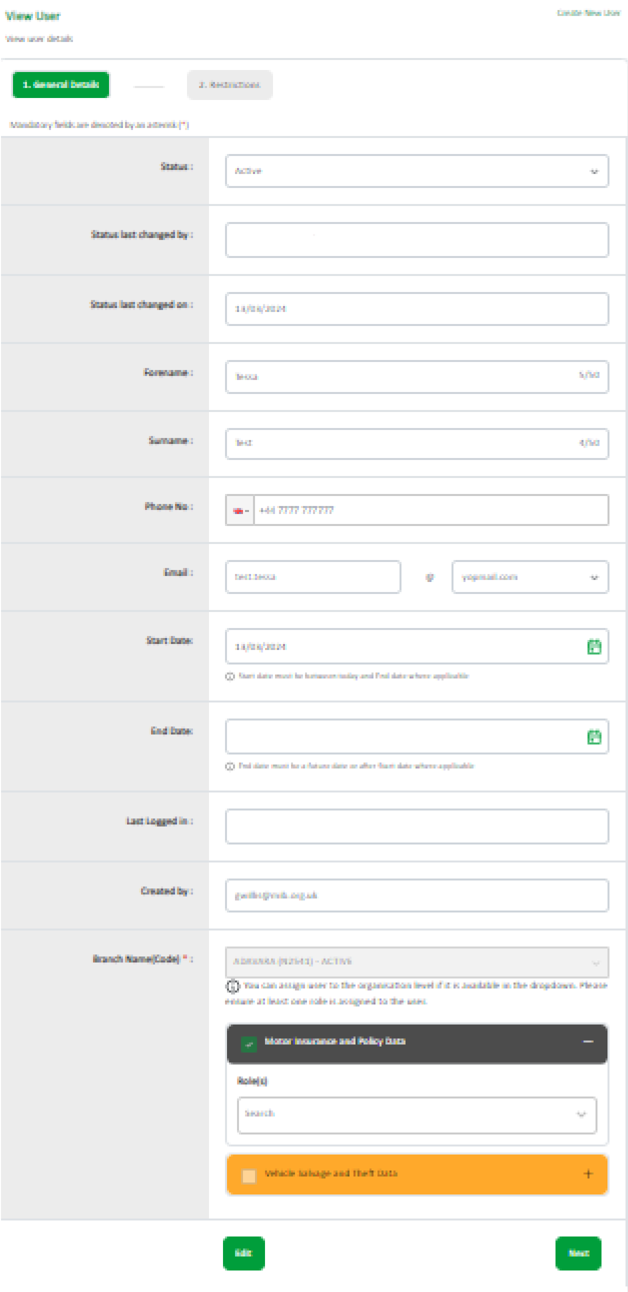
6.2 Manage/View user details

You may need to manage current users. Select a user from the table presented in the “User” tab. Once selected their details will populate on the screen.

This view will show read only details, if their details need to be updated, select the “Edit” button.

Depending on your role/who you’re branch admin for, you’ll be able to change their contact details, branch name, their restrictions or lock/suspend their account.

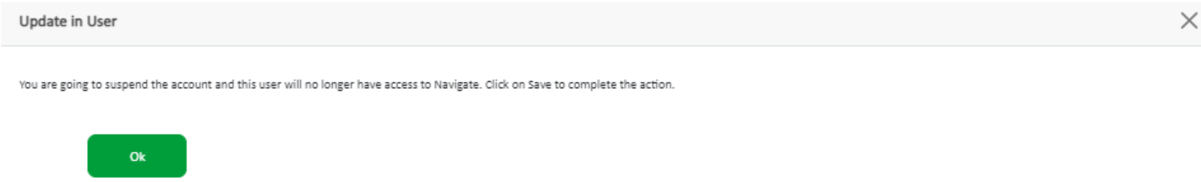
You’ll be able to add or remove roles for each branch under this user. **A user at branch level must have at least one branch assigned to them, with at least one role.**



6.3 Suspended/locked user

If a user is required to be suspended, only an Organisation or Branch Admin can perform this action from the edit function within user management. If the user is not within a separate branch, only the Org Admin can do this. If the user is within a branch, either the Org admin or a Branch Admin from the same branch can do this. Once a user has been selected, click on “Edit” and choose their Status from ‘Active’ to ‘Suspended’.

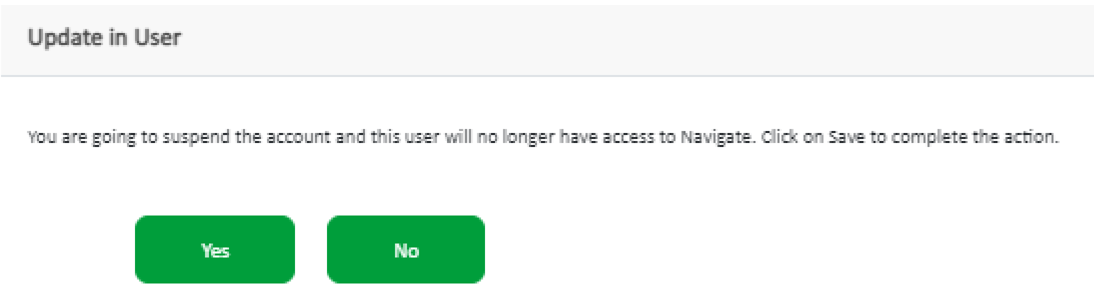
You’ll be presented with a pop up to confirm the change in status.



If ‘Suspended’ has been selected, an additional field will be populated, and you’ll be required to choose from the following options:

- User left the company
- User does not need the account

Press “Save”, and you’ll be presented with the pop up once more, asking if you’re sure you want to lock this users account, as they will no longer have access to the portal.



If required, you’ll be able to identify who made a change to the user’s status by looking at the ‘Status last changed by’ and on which date.

A user will become locked after 90 number of days of inactivity.

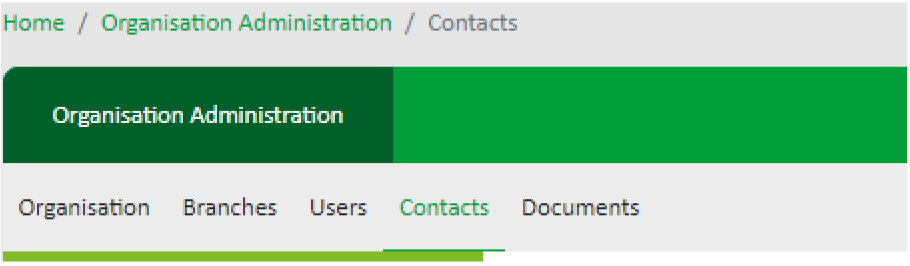
After 180 days of the user getting locked, their details will be deleted from the system. However, when the user is in an active state, the activity of the user will still be kept.

If the branch is in a suspended state, you won't be able to change the status of the user from Suspended/Locked to Active. If the status of a user is 'Blocked', only MIB will be able to unlock this after raising a service request via the help button.

If you need to reactive a user's account, simply change the status from 'Locked/Suspended' to 'Active'. The user will be sent an email to notify them of the change and will be able to log back into their account.

7 Contacts

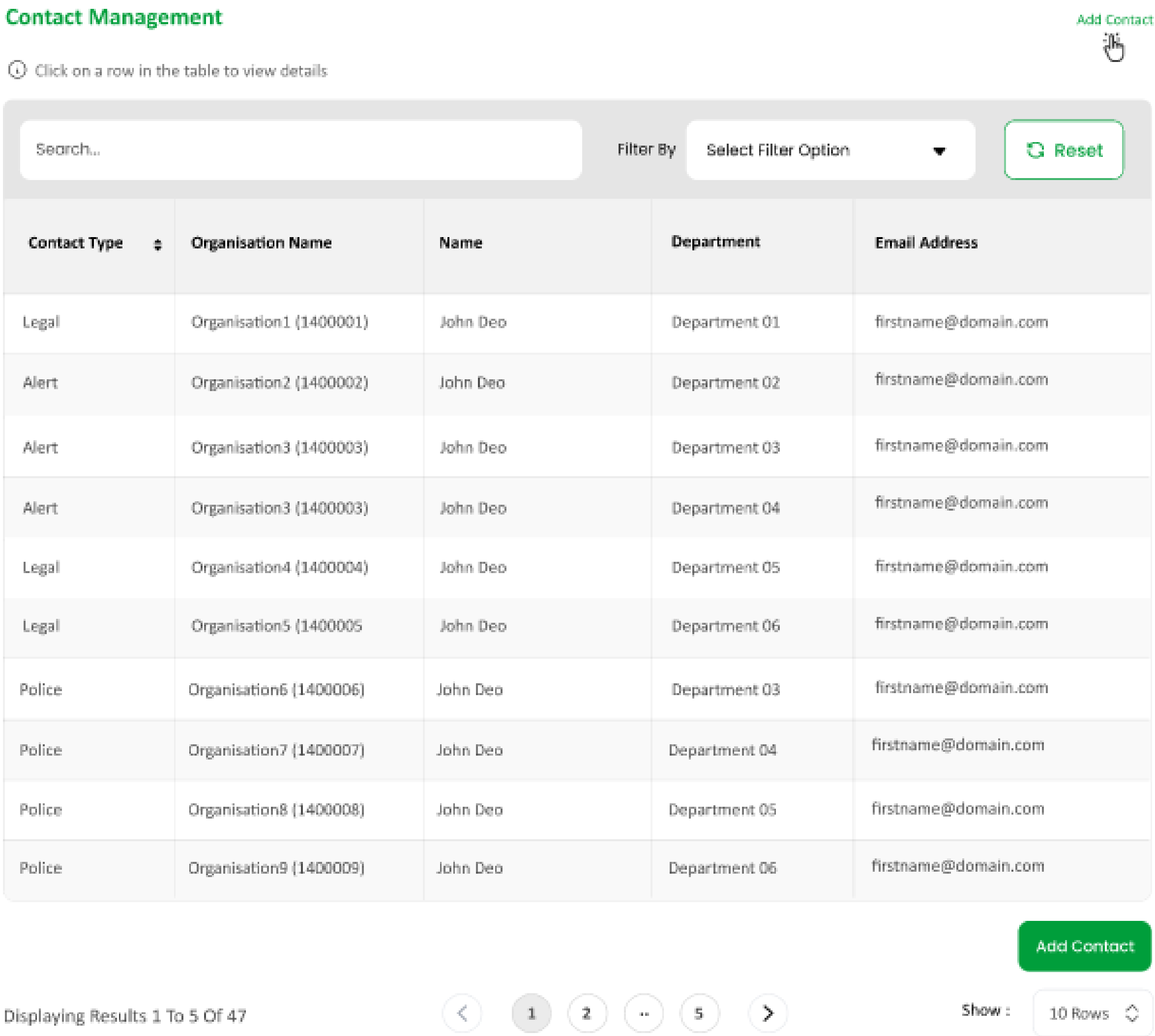
Access to important contacts associated to your organisation can be found by selecting the “Contacts” option if available.



You can add and edit these contacts depending on the services you access.

7.1 Add contact

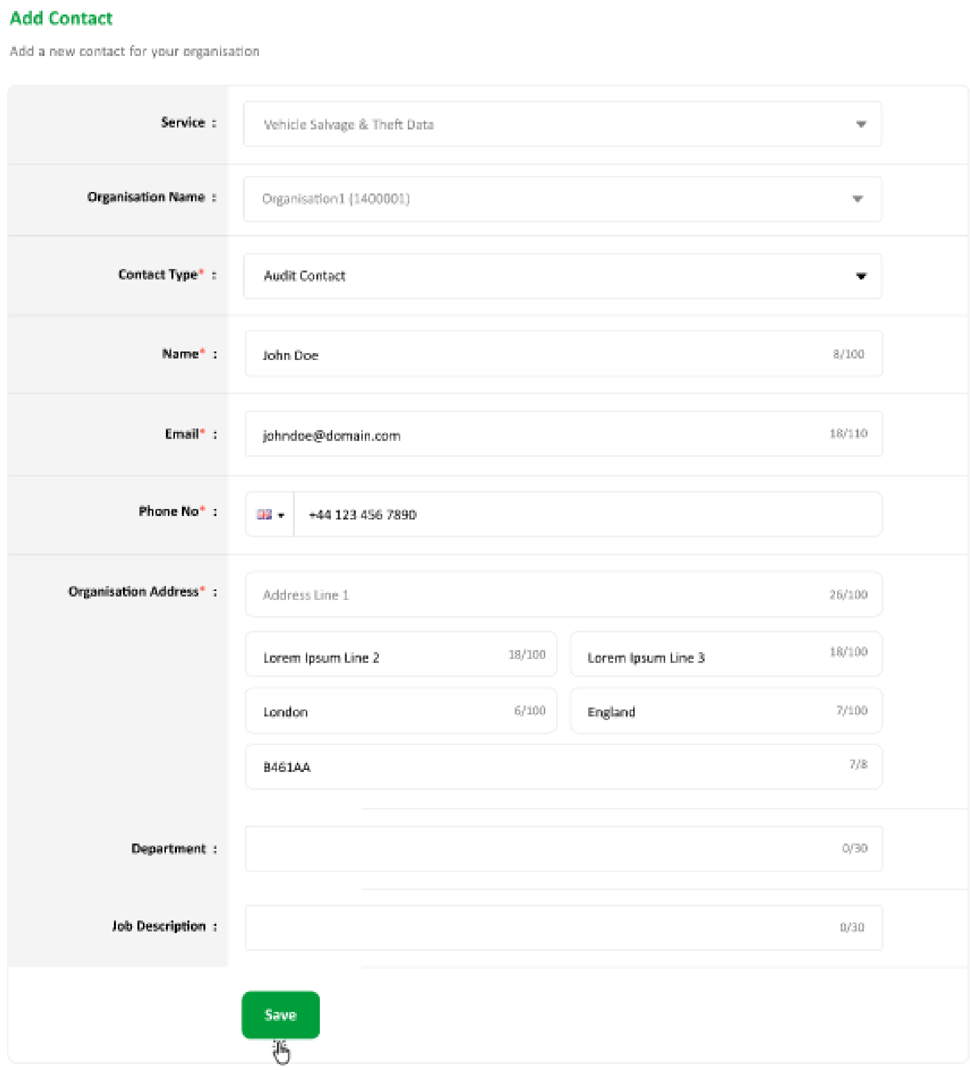
To add a contact, select “Add Contact” at the top or bottom of the page. This will open a new page and will allow you to enter in all the relevant details required for your contact.



Contact Type	Organisation Name	Name	Department	Email Address
Legal	Organisation1 (1400001)	John Deo	Department 01	firstname@domain.com
Alert	Organisation2 (1400002)	John Deo	Department 02	firstname@domain.com
Alert	Organisation3 (1400003)	John Deo	Department 03	firstname@domain.com
Alert	Organisation3 (1400003)	John Deo	Department 04	firstname@domain.com
Legal	Organisation4 (1400004)	John Deo	Department 05	firstname@domain.com
Legal	Organisation5 (1400005	John Deo	Department 06	firstname@domain.com
Police	Organisation6 (1400006)	John Deo	Department 03	firstname@domain.com
Police	Organisation7 (1400007)	John Deo	Department 04	firstname@domain.com
Police	Organisation8 (1400008)	John Deo	Department 05	firstname@domain.com
Police	Organisation9 (1400009)	John Deo	Department 06	firstname@domain.com

Select the relevant service where application, choose which organisation you require this contact to be set up against and the type of contact they are:

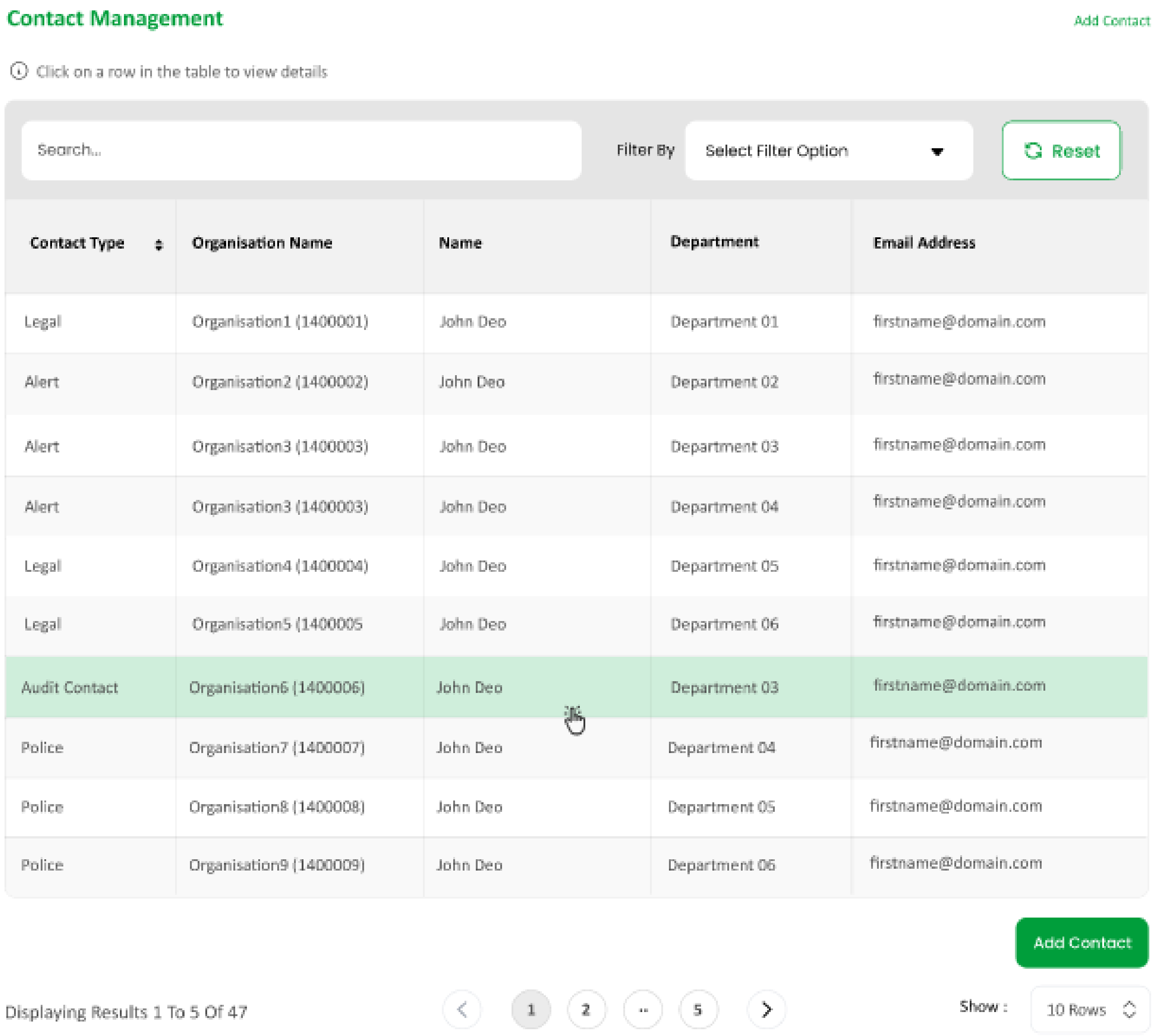
- Police
- Audit
- Alert
- Support
- Legal



Additional fields will then populate for you to fill in, then click “Save”.

7.2 Edit contact

By selecting on a specific contact type, you’ll be able to view further details in relation to that contact.



Contact Management

Add Contact

Click on a row in the table to view details

Search...

Filter By

Select Filter Option

Reset

Contact Type	Organisation Name	Name	Department	Email Address
Legal	Organisation1 (1400001)	John Deo	Department 01	firstname@domain.com
Alert	Organisation2 (1400002)	John Deo	Department 02	firstname@domain.com
Alert	Organisation3 (1400003)	John Deo	Department 03	firstname@domain.com
Alert	Organisation3 (1400003)	John Deo	Department 04	firstname@domain.com
Legal	Organisation4 (1400004)	John Deo	Department 05	firstname@domain.com
Legal	Organisation5 (1400005	John Deo	Department 06	firstname@domain.com
Audit Contact	Organisation6 (1400006)	John Deo	Department 03	firstname@domain.com
Police	Organisation7 (1400007)	John Deo	Department 04	firstname@domain.com
Police	Organisation8 (1400008)	John Deo	Department 05	firstname@domain.com
Police	Organisation9 (1400009)	John Deo	Department 06	firstname@domain.com

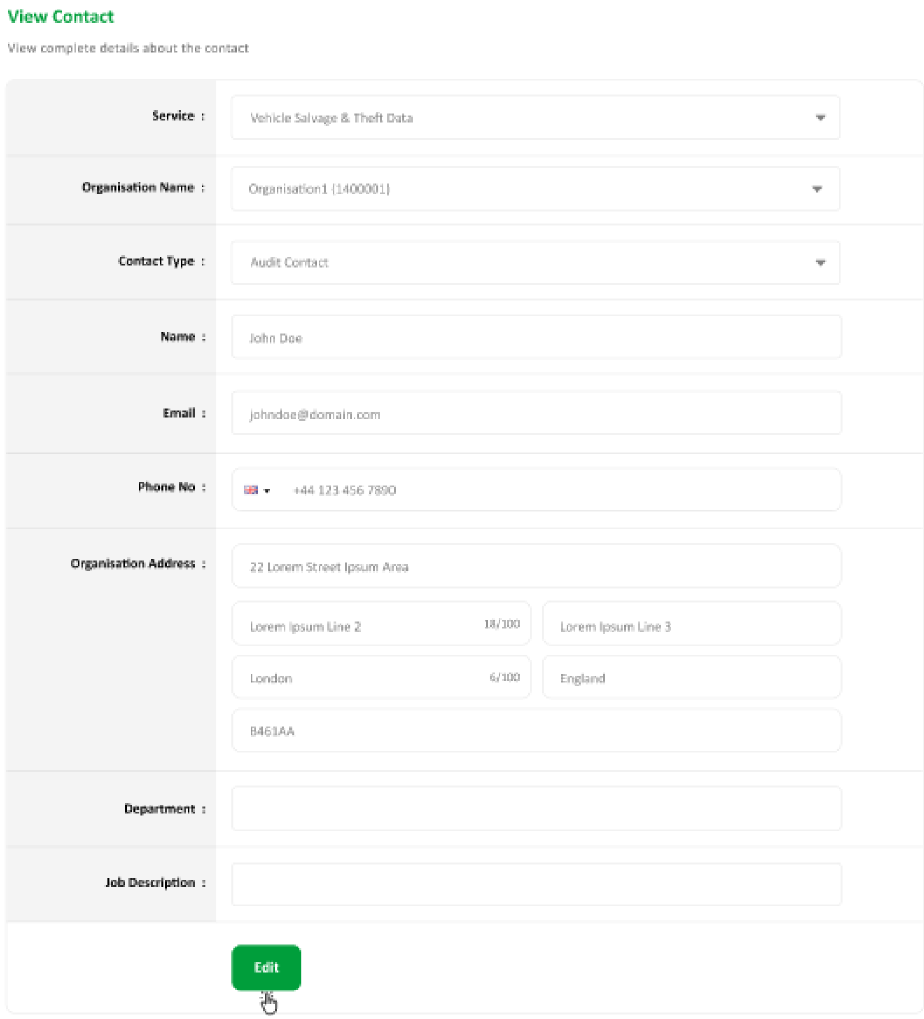
Add Contact

Displaying Results 1 To 5 Of 47

1 2 .. 5

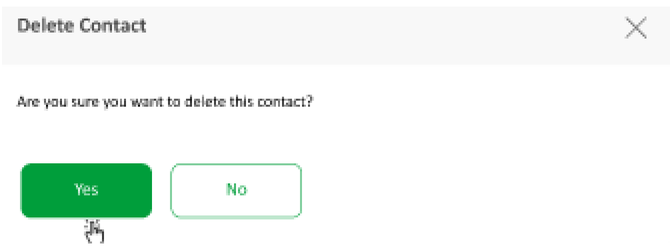
Show : 10 Rows

This will open a new screen. Select "Edit" at the bottom of the page and amend the relevant details.



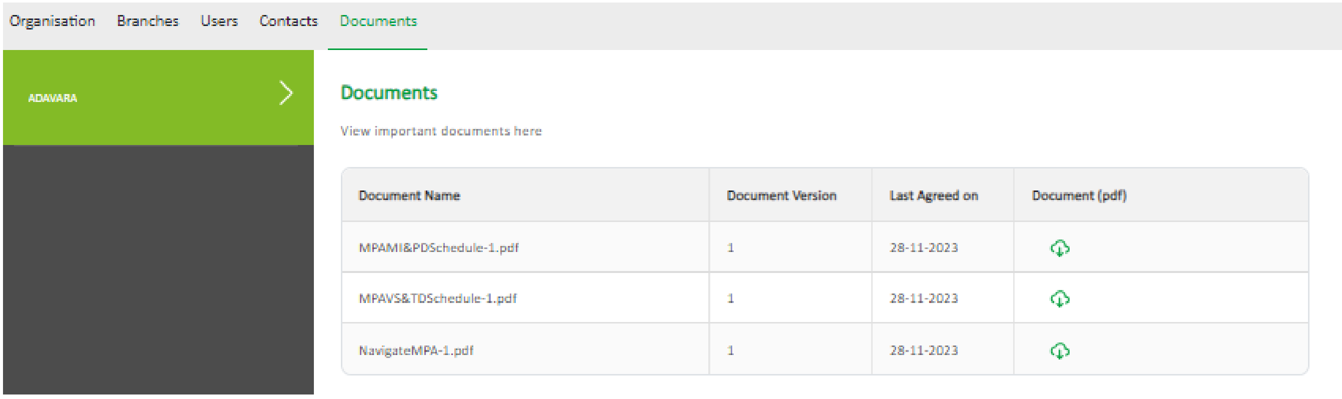
7.3 Delete contact

If you need to delete a contact, select “Edit”, this will open the contact view in edit mode, an additional button at the bottom of the page will appear, select “Delete” to delete this contact. You’ll be presented with an additional pop-up to confirm this change. Please note that not all contacts can be deleted. If you do not see a ‘delete’ button, the contact is mandatory and can only be edited.



8 Documents

When you're in your organisation admin area, you'll be able to view and download any important documents your organisation has accepted or requires access to. Select "Documents" in the options at the top of the page. This area will show you documents such as user agreements and schedules.



Appendices

9 Appendices

9.1 Motor Insurance Policy Data Roles

Role	Description
Search	Seach for a vehicle record on the database for own insurance and 3rd party insurers.
Data Submissions	Review the data submissions of your organisation by checking the status and summary of a submission.
Update Vehicle (read only)	View fleet/commercial policies and vehicles.
Update Vehicle	View fleet/commercial policies and vehicles, amend, add and remove vehicle/driver data. Submit files and view the status of files submitted by the organisation and check summary of files.
Helpdesk Level 2 (L2)	Access to policyholder users, add, amend, remove users and policies, authorise L3 actions.
Helpdesk Level 3 (L3)	Access to policyholder users, add, amend, remove users and policies with the need to be authorised by L2.
Policyholder	Ability to add files, review file status', check the summary of a file. Add/amend/remove vehicles from a policy without driver data associated to the vehicle record.

9.2 Vehicle salvage & Theft Data Roles

Role	Description
Limited Enquirer	Search a vehicle using VRM or VIN. View versions and vehicle audit trail.
Full Enquirer	Search claims using all fields. View versions and claim audit trail.
Limited Input User (prev. Branch User)	Insert or amend a claim. Search claims using all fields. View versions and claim audit trail.
Input User	Insert, amend or delete a claim. Search claims using all fields. View versions and claim audit trail.
Management User	Insert, amend, delete or reinstate a claim. Search claims using all fields including postcode only. View versions and claim audit trail. View and manage alerts. Create reports.
Fraud Investigator	Search claims using all fields including postcode only. View versions and claim audit trail.

All roles are multi select depending on users' needs