# **NAVIGATE**



# Organisation & Branch Admin User Guide

For Organisation & Branch Admins to use Navigate.

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#### 1 Introduction

Navigate is home to Motor Insurance Policy Data (MIPD) from the former Motor Insurance Database (MID).

From **24 November 2025** data from the Motor Insurance Anti-Fraud and Theft Register (MIAFTR) will also be accessed from the Vehicle Salvage and Theft Data (VS&TD) tile within the Navigate portal.

This **User Guide** helps users to access and manage Organisation and User data within the Navigate portal.

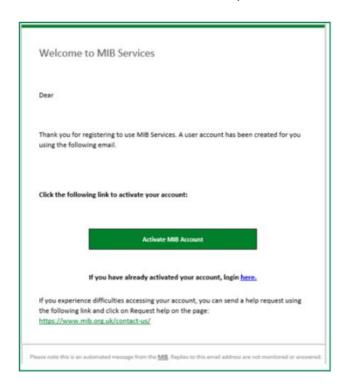
# 2 Setting up your Navigate account

# 2.1 Activating your account

Your organisation **must** whitelist the following email addresses: <a href="mailto:noreply@identity.mib.org.uk">noreply@identity.mib.org.uk</a> and <a href="mailto:noreply@okta.com">noreply@okta.com</a> to ensure you can receive emails relating to your Navigate account.

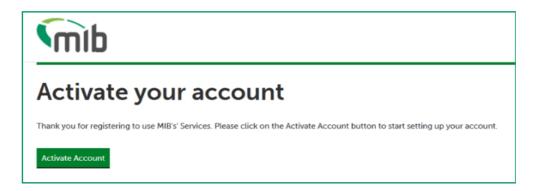
Once you've been set up by your own organisation administrator or branch administrator, you'll need to complete the following to access <a href="Navigate">Navigate</a> (<a href="https://identity.mib.org.uk/user/login">https://identity.mib.org.uk/user/login</a>).

You'll receive this activation email, click on Activate MIB Account in that welcome email.



This will open in your browser.

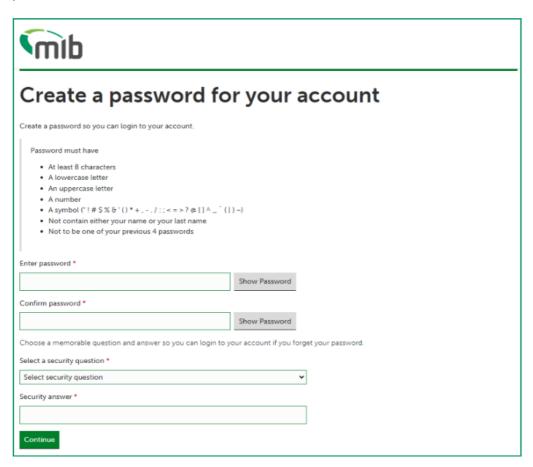
#### Click Activate Account.



Your username is your email address.

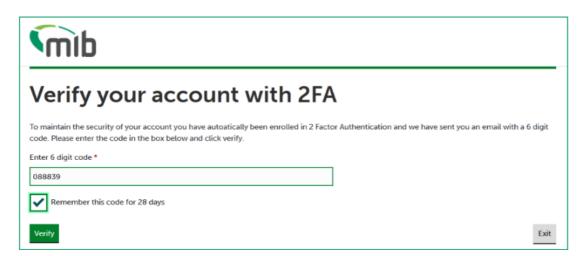
You'll need to set a **password** and answer a **security question**.

It's important you remember the answer to your security question as you'll be asked to provide this in future.

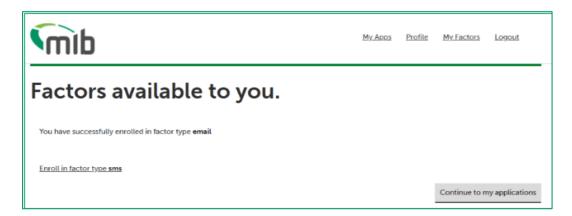


You'll then be automatically enrolled in a **2-Factor Authentication (2FA)** using your email address.

You'll receive an email with a 6-digit code to verify your account.

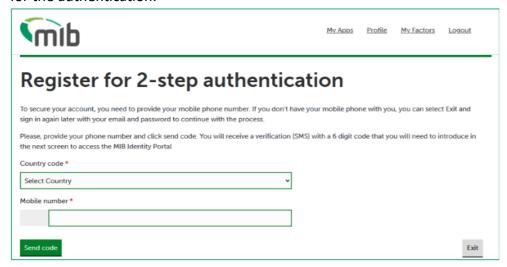


Once you've clicked **Verify**, you can either set up the 2FA with a mobile phone number or, continue to the Navigate portal by selecting **Continue to my applications**.

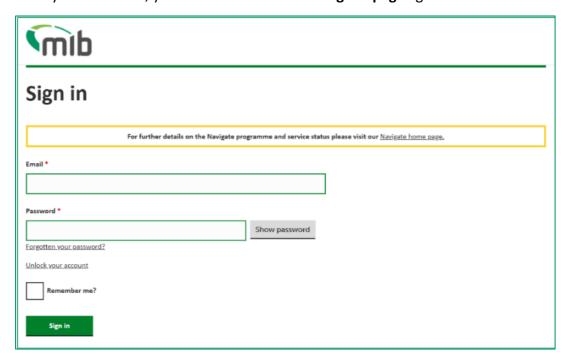


### 2.2 Using a mobile phone for 2FA

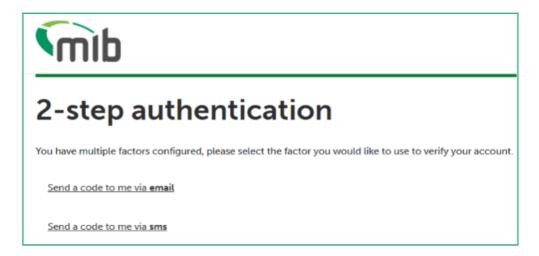
To set up 2FA using a mobile number, you need to select the country code and enter your number. When you click **Send Code**, you'll receive a text massage containing the 6-digit code for the authentication.



Once you're verified, you'll be redirected to the Sign in page again.

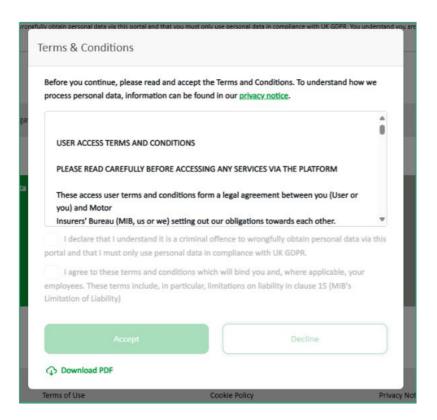


You'll then be given the options of email or mobile phone for authentication.



# 2.3 Accepting the Terms & Conditions

To proceed, scroll through the document and accept. You'll only see this when you first log in and if there are any changes to the T&Cs.

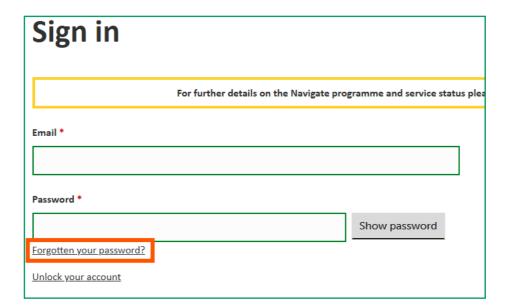


You'll then be directed to the Navigate portal to access your services.

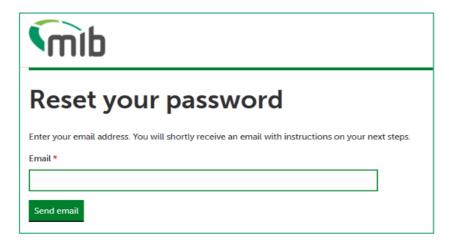


# 2.4 Forgotten your password or need to change it?

Select **Forgotten your password?** on the Navigate sign in page. Please note you can only reset your password once your account has been activated.

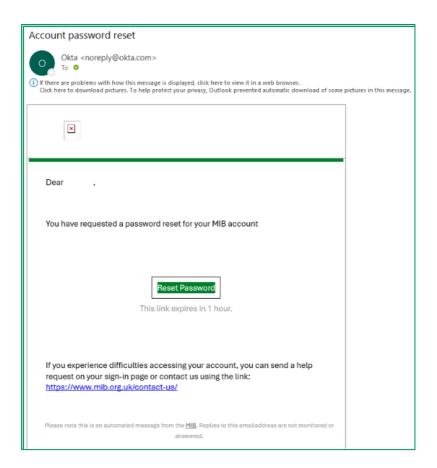


You'll be taken to the **Reset your password** page where you'll need to provide your email address that was used when your account was set up.

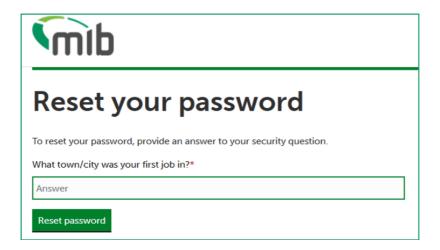


You'll receive an email to reset your password. Navigate uses a third party provider to make logging in to the platform easier and more secure.

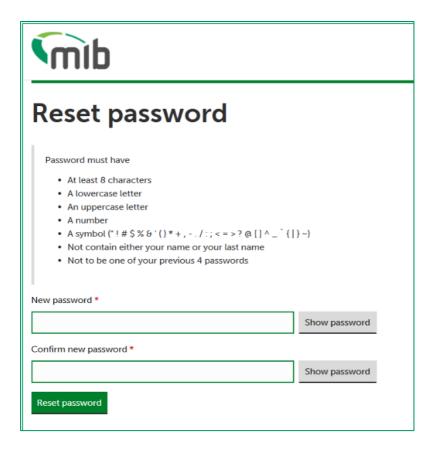
You'll need to follow the link in the email **within an hour** before the link expires or you'll have to repeat this process.



You'll then need to answer the security question you provided when you registered.



Proceed to **Reset password** and once you've entered and confirmed, click **Reset password** to save your changes.



You'll then be asked to complete 2FA using either your email address or phone number. Authentication is needed if you forget your password or need to reset your account.

#### 2.5 Getting Locked out of Navigate

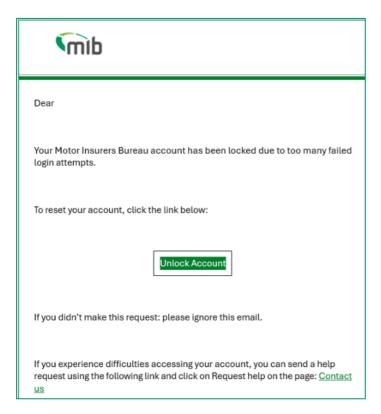
You can get locked out of your Navigate portal account for two reasons:

- Account inactivity: If you don't use Navigate for 90 days, your account will be locked.
  After 180 days of inactivity, your account will be deleted. If you've been locked, or suspended from using the Navigate portal, you'll be notified by email.
  - You'll need to contact an organisation administrator who'll be able to reactivate your account. If you have been locked out and you are the sole organisation administrator, you'll need to raise a **Contact Us** form on the log in page so MIB can unlock your account.



• User login issues i.e. repeated incorrect password entry:

If you experience any log in issues which result in your account being locked, you'll get a notification on your screen and an email to advise that your account is locked. Your account will be unlocked automatically after a short period of time but if immediate access is required, following the unlock process which includes clicking unlock your account, entering your email address to receive an unlock link. This will take you to a screen to answer your security question which will unlock your account.

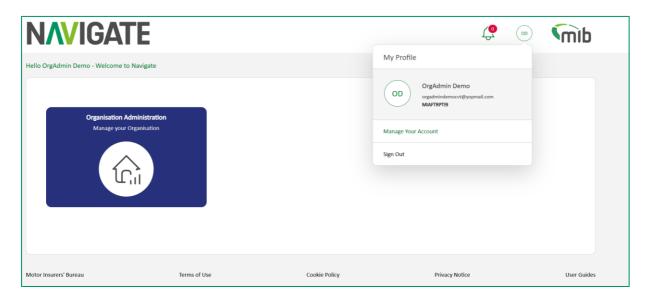


# 3 Managing your Account

# 3.1 Your Navigate Profile

To manage your Navigate portal account, click on your profile (the circle with your initials at the top of the page).

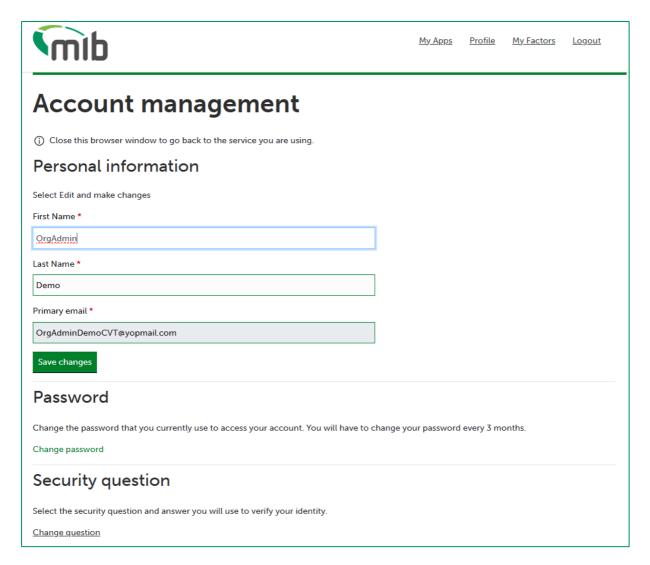
You'll also see a notification bell, where useful updates will be sent to keep you informed about updates, changes or issues.



My Profile will drop down with your User Details and these options:

- Manage Your Account; where you can change your password and your security question.
- Sign Out; click to Log out of the Navigate Portal

Click Manage Your Account to update your Personal Information.



If you need to change your first or last name, please contact an **Organisation Administrator** who will be able to edit those fields in your user profile. Changing your name here won't reflect in the Navigate portal.

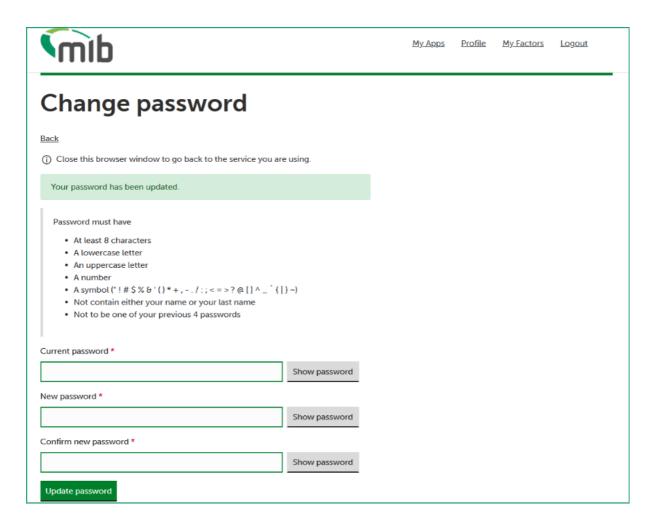
Your Primary email can't be changed, and you'll need to contact an **Organisation Administrator** who'll be able to set up new **User Credentials** for you.

If you are the sole organisation administrator, you'll need to raise a **Contact Us** form on the log in page so MIB can change your details.

# 3.2 Changing your password

You can change your current password, click on **Change password** under the **Password** section.

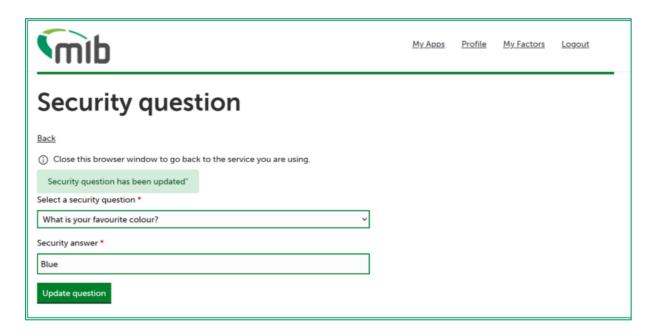
Complete the fields on the Change password page.



You can change your security question in the **Security question** section.

You'll see your current security question.

Use the drop down to pick another question, provide an answer and click **Update Question**.



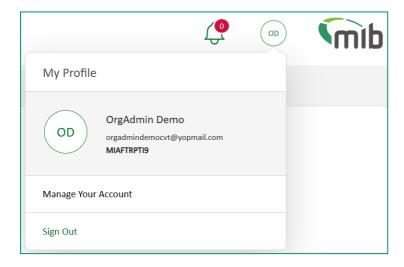
#### Within Account Management, you'll see:

- My Apps opens all Navigate services you have access to
- Profile links to your account management page
- My Factors shows alternative 2FA options if you haven't set these up already
- Logout to sign out of your Navigate portal account



# 3.3 Signing/Logging out

To sign/log out of your account, click your **profile** button and **Sign Out**.



This will log you out and you'll get a **Logged out successfully** screen to confirm this.

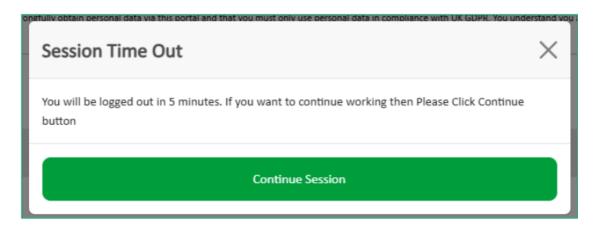
To Sign In again, use the link **Click here if you would like to log back in**, to take you to the sign in page.



#### 3.4 Time out

If your session is about to time out, you'll get a warning that you'll be logged out in 5 minutes.

If you don't click **Continue Session**, you'll be logged out.



# 4 Organisation & Branch Administration Overview

If you're an **Organisation Administrator** (Org Admin), you'll be able to:

- view all your organisation details including contacts
- manage branches
- manage users within your organisation and branches
- where relevant, view your organisation's VS&TD supply codes (not visible to Delegated Authorities)
- where relevant, view and add VS&TD contacts
- view and download all Navigate documents signed by your organisation

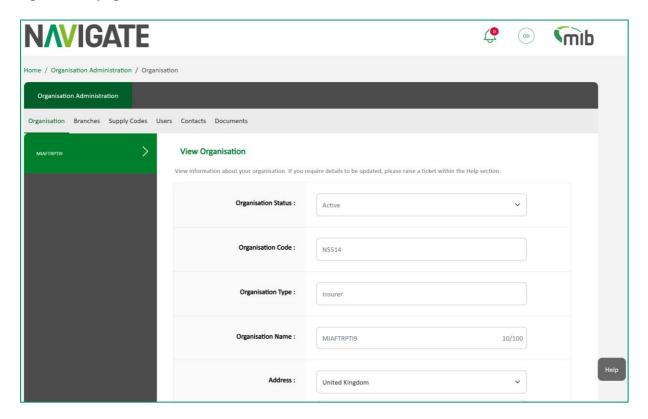
If you're a **Branch Admin**, you'll be able to:

- view all your organisation's details including contacts and users
- view and filter on branches within your organisation
- edit branch information for your branch
- where relevant, view VS&TD supply codes within your branch (not visible to Delegated Authorities)
- manage users within your branch

If you have either of these roles, you'll see this tile on your Navigate home screen. Click this tile to do any of the tasks above.

# **5 View Organisation**

In the tile, you'll see your organisation's details that are held on Navigate. If you need your organisation's details amended, you'll need to raise a request, by clicking **Help** at the bottom right of the page.



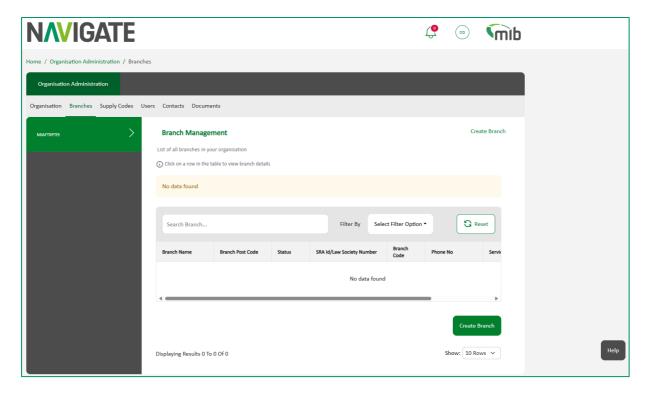
#### 5.1 Create a Branch

Branches refer to groups, departments, teams or branch locations within your organisation.

Depending on your organisation type, you may need or wish to create branches. MIB can't do this for you.

Click Branches from the top menu. If you're accessing this for the first time, there will be no branches to view, but once you've created branches, you'll see a table showing them.

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



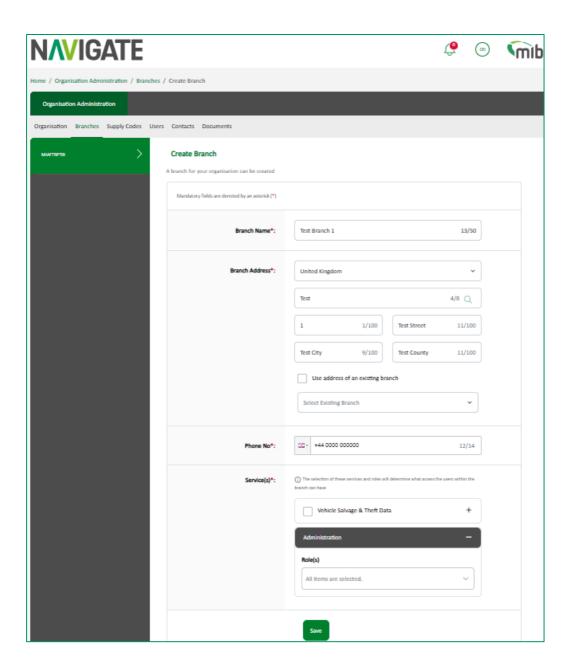
Enter all the relevant information about your new branch.

Choose the services the new branch needs from:

- Organisation Administration
- Motor Insurance Policy Data (MIPD)
- Vehicle Salvage & Theft Data (VS&TD)

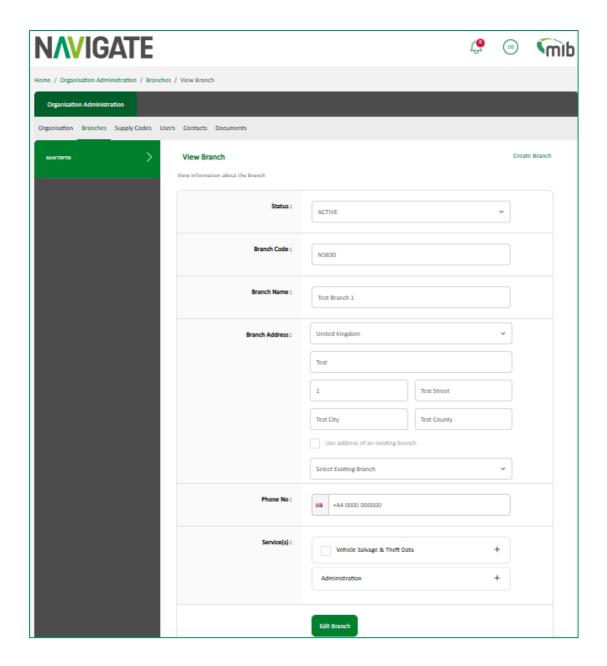
Once you've selected the services, click the dropdown under Roles select all roles needed for that branch.

For more information about User Roles and their access see Navigate User Roles in **section 11**.



# 5.2 Managing a Branch

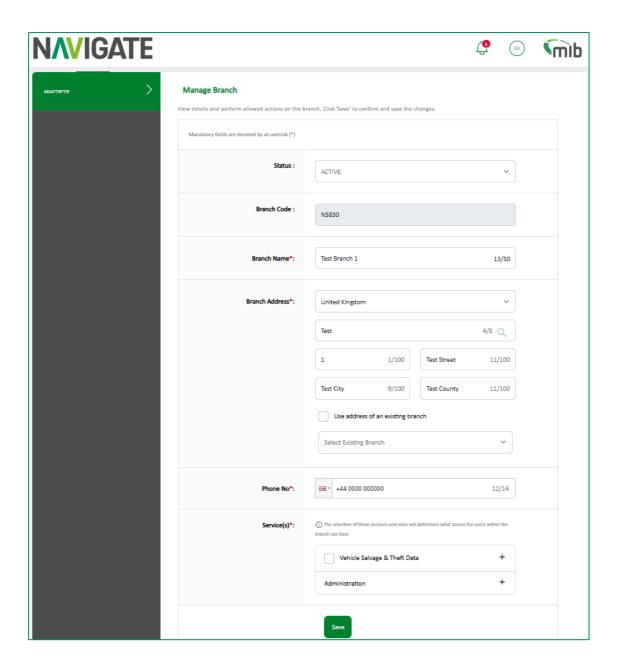
To manage the branch click **Edit Branch** at the bottom of the screen.



On the editable branch page you can make your amendments, such as adding additional services, updating your branch's contact details or suspending a branch.

When you suspend a branch, this will automatically suspend all active users within the branch.

Click **Save** to confirm your changes.



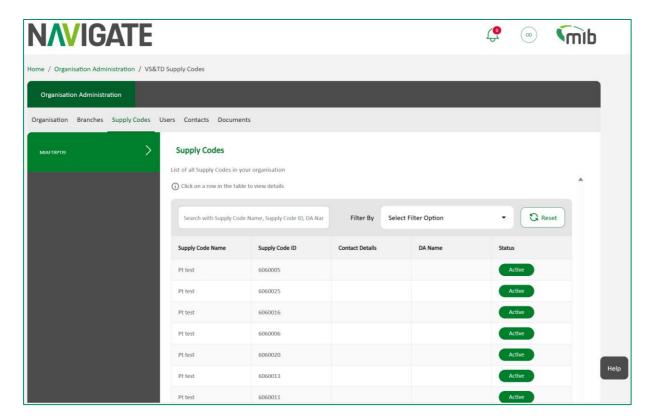
# **6 Supply Codes**

You'll find a list of all your organisation's VS&TD Supply codes with their code ID and status.

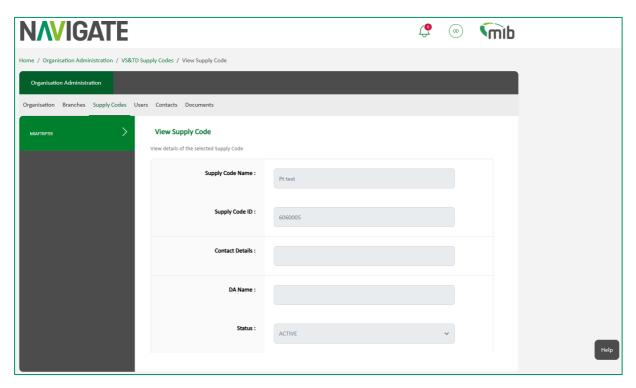
Please note, Delegated Authorities (DA's) won't be able to see Supply codes.

You can search with Supply Code Name, Supply Code ID or DA Name.

If you'd like to change the status of any of your code such as change a supply code's status to run off, or the name of the code, please raise a Contact Us form. Check Getting support in **section 10**.



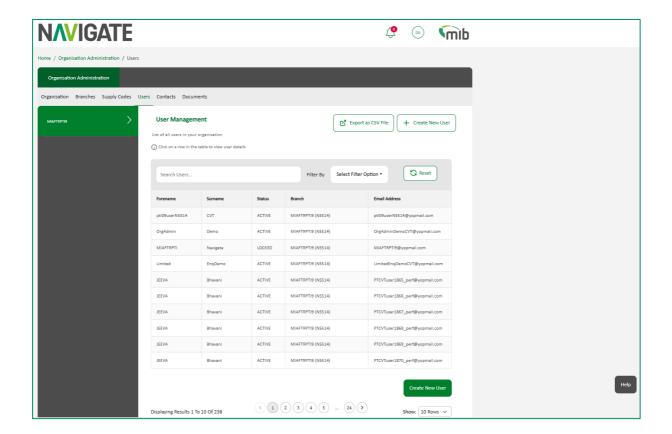
You can click into a supply code to view the details.



# 7 User management

Click **Users** in the top menu to view all your users within your organisation.

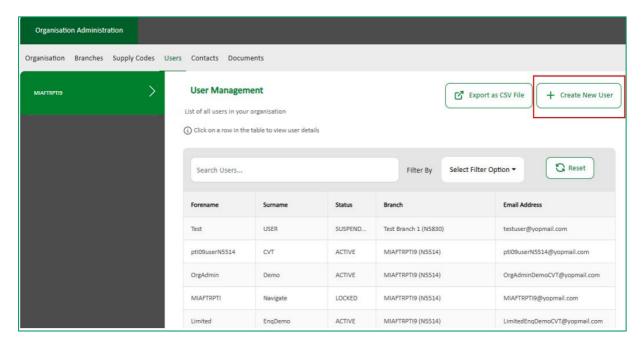
You can search for users by their name, email address or filter by Status or Branch.

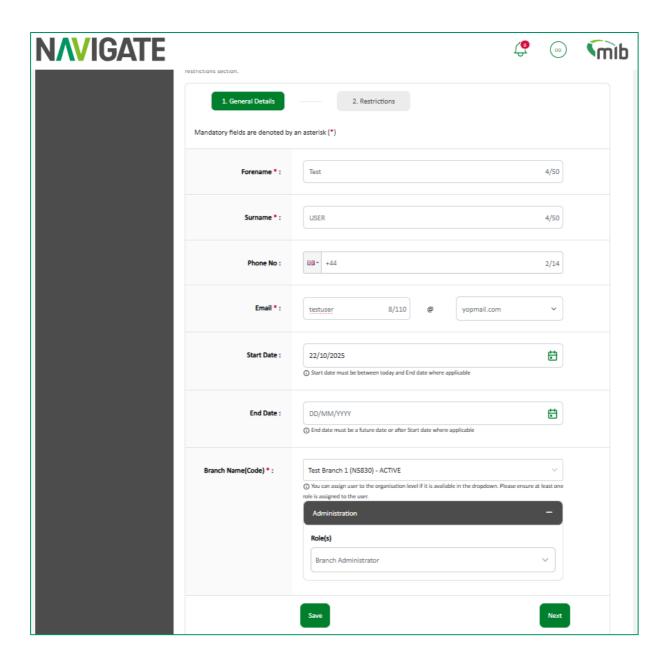


# 7.1 Creating new users

Click Create New User at the top or bottom of the page.

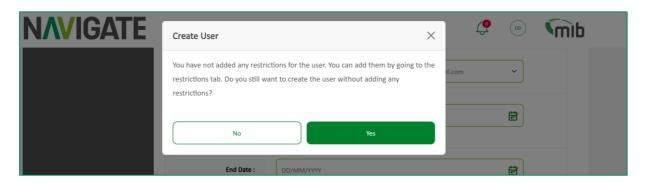
A new screen will open, and you'll need to fill out the users' details, select a branch and choose their required role(s).



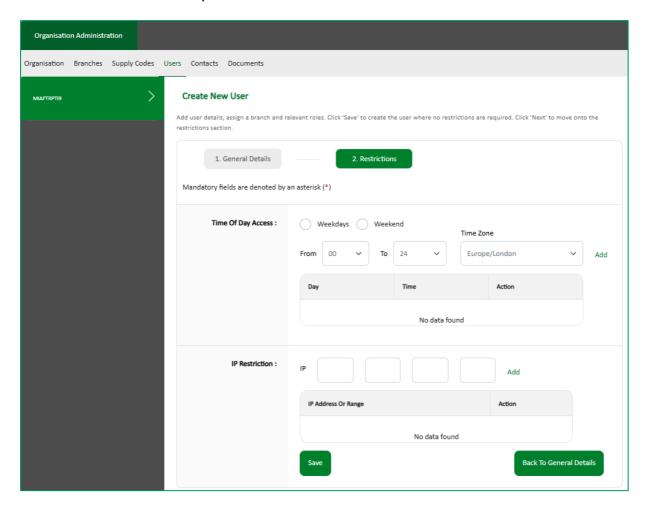


You can click **Next**, to add the restrictions to the user if needed.

If you click **Save**, you'll be able to create a user without any restrictions. A pop-up message will ask you to confirm, and you'll need to click **Yes** to add the user without any restrictions.



If you want to set restrictions up for the user at this point, click **No** and provide the relevant details. Then click **Save** and your user will be created.



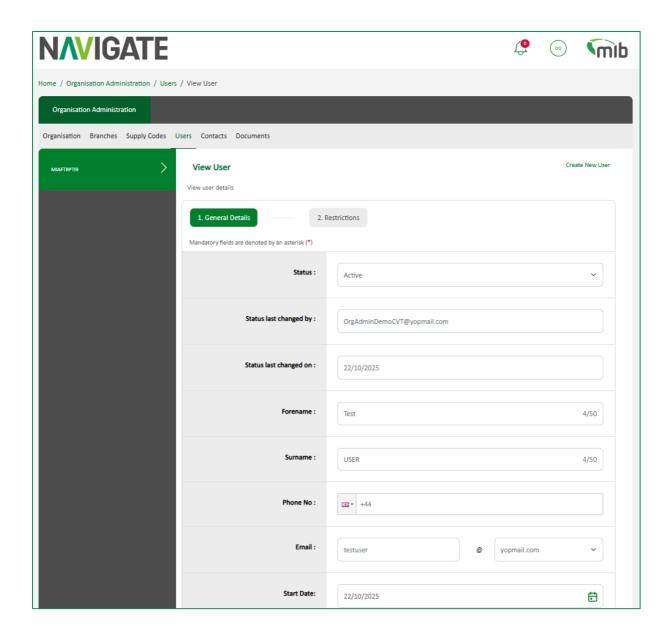
# 7.2 Managing user details

To manage your current users, select a user from the table presented in the **User** tab. Once selected their details will show on the screen.

This view is read only; if their details need to be updated, click **Edit**.

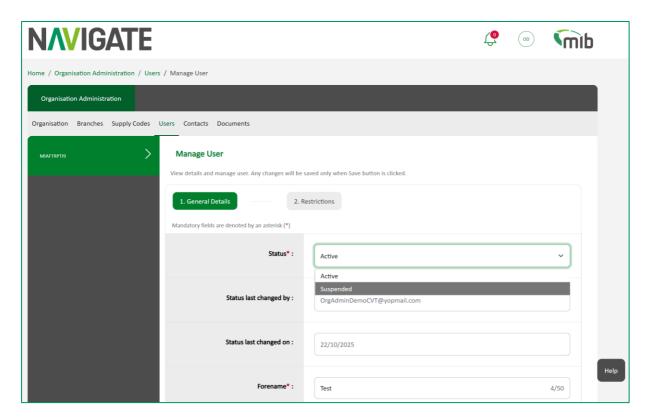
Depending on your role, you'll be able to **change their contact details, branch name, their restrictions** or you can suspend their account.

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.

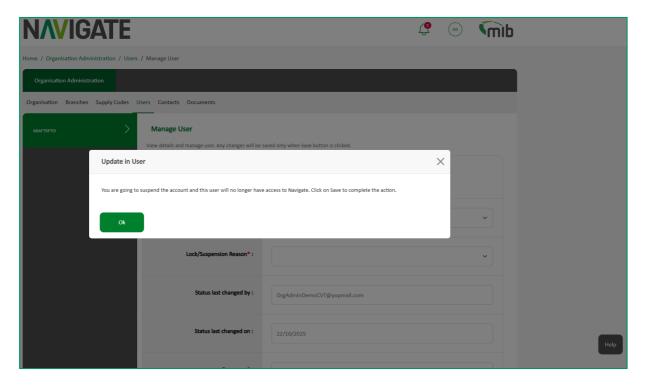


# 7.3 Suspending a user

If a user needs to be suspended, only an **Organisation** or **Branch Administrator** can perform this action from the edit function within **User Management**. If the user isn't within a branch, only the **Org Admin** can do this. Once a user has been selected, click on **Edit** and change their **Status from Active to Suspended**.



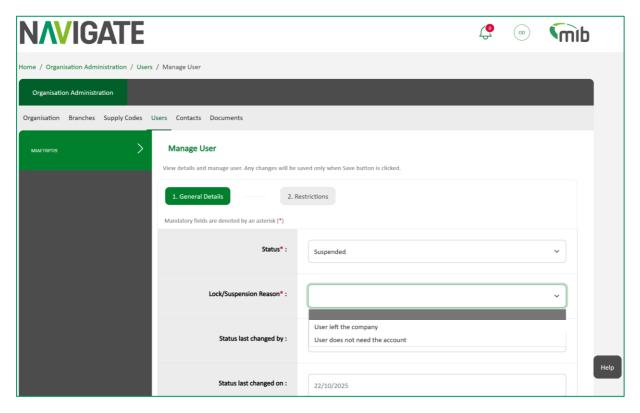
You'll be presented with a pop up to confirm the change in status.



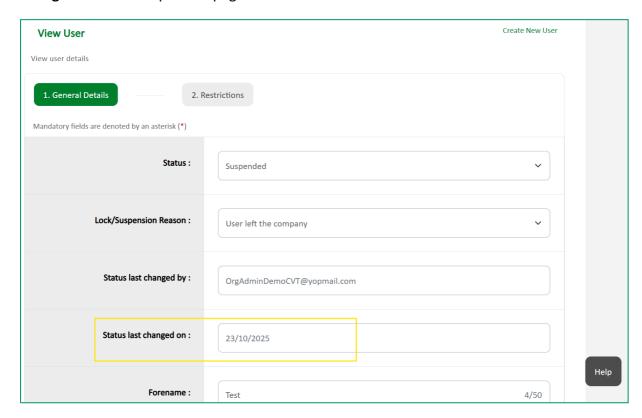
If **Suspended** has been selected, an additional field will be populated, and you'll be required to choose from the following options:

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

#### Click Save to confirm.



Any changes to User Status' (including dates) can be viewed by looking at the **Status last change** field at the top of the page.

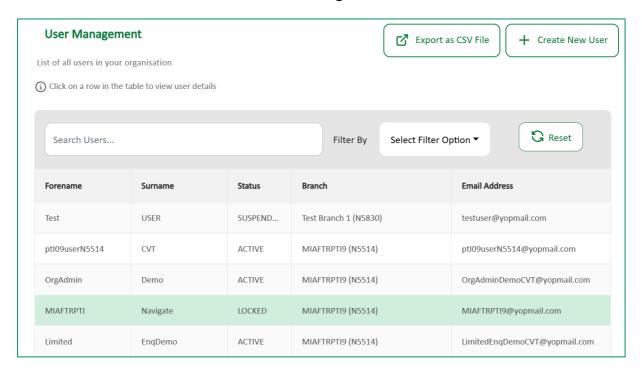


### 7.4 Unlocking a locked user account

A user will become locked after 90 days of inactivity.

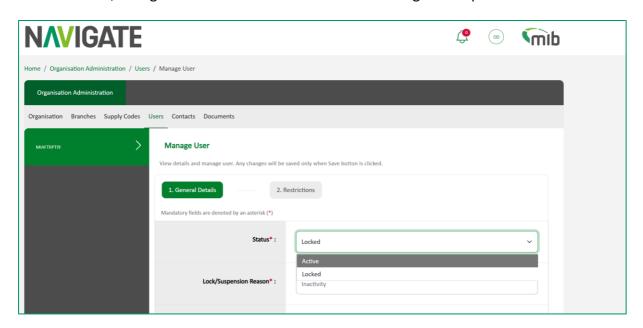
Organisation or Branch Administrators can unlock locked user accounts.

Select the locked user's account from User Management list.

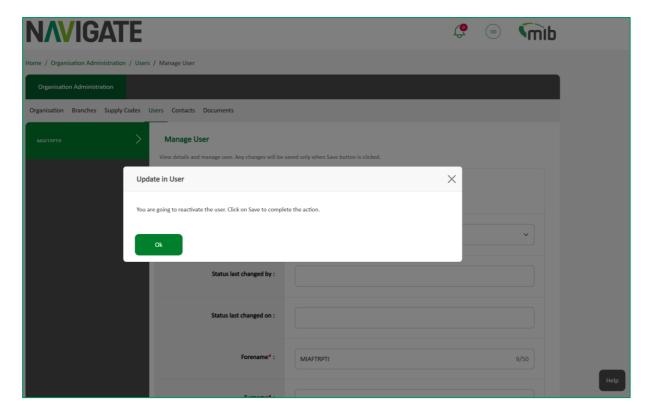


Before unlocking, check Lock/Suspension Reason is Inactivity.

Then click **Edit**, change the **Status** from **Locked** to **Active** using the drop down.



You'll be presented with a pop up to confirm the change in status. Click **Ok** and then **Save** to complete reactivation.



After 180 days of inactivity, the user's 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 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.

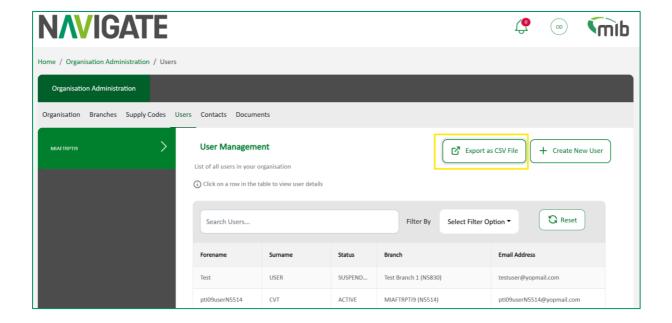
If you need to reactivate a user's account, simply change the status from **Locked/ Suspended** to **Active**. The user will be sent an email to notify them of the change and will be able to log back into their account.

#### 7.5 Last Login Report

To access a report of your users and their last login dates, click on **Export as CSV file**. This will download the report.

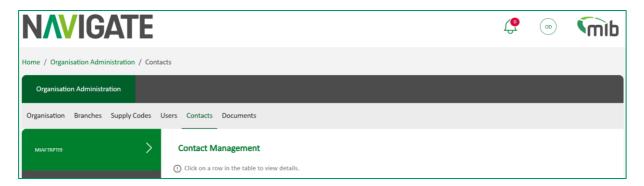
You'll find list of all your organisation/branch users and further details such as their assigned role, activity status and the date of their last login.

This will support your internal user management.



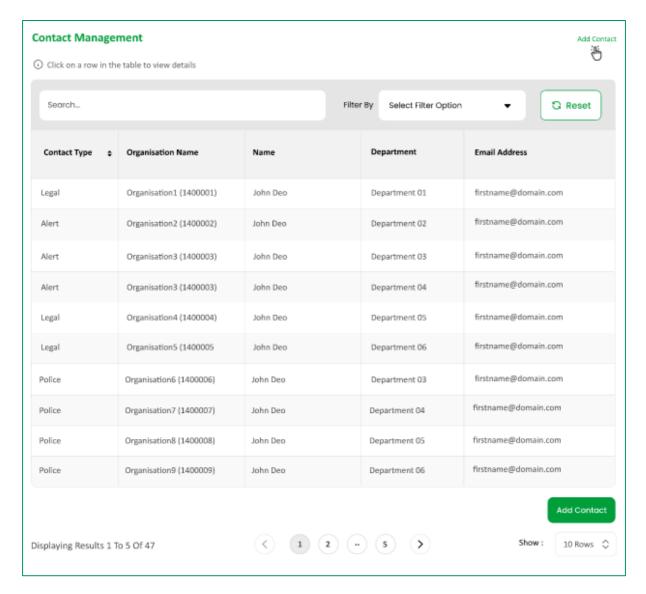
# 8 Contact management

You can add and edit contacts associated with your organisation depending on the services you access in the **Contacts** tab.



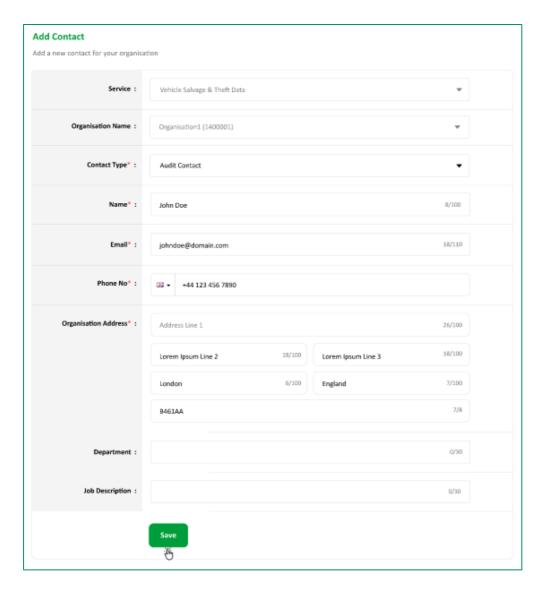
#### 8.1 Add contact

Click **Add Contact** at the top or bottom of the page, which will open a new page.



Select the relevant service and select from the below contact types:

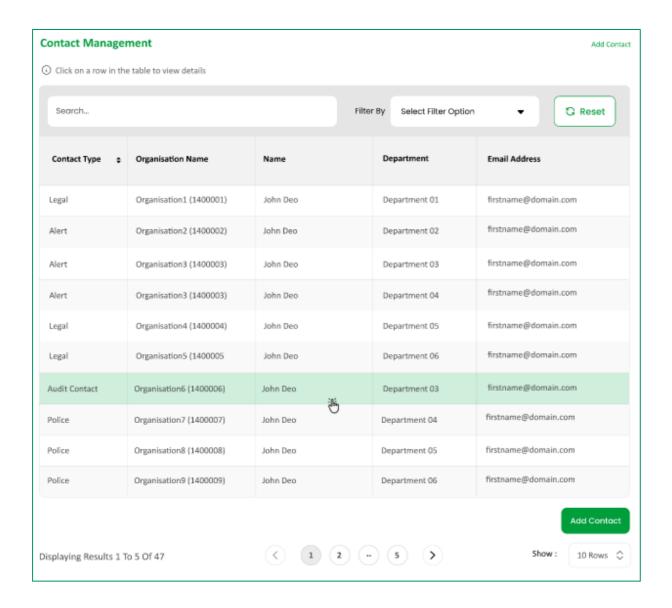
- Police
- Audit
- Alert
- Support
- Legal

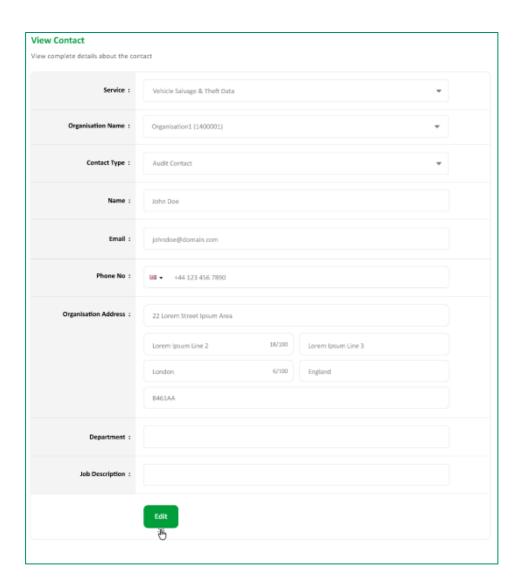


Additional fields will then populate for you to fill in, then click Save.

#### 8.2 Edit contact

You can sort your contacts by Contact Type, Department and email address, or use the Filter Option. If you want to see the details for a contact, click on their details and this will open a new screen. Select **Edit** at the bottom of the page and amend the relevant details.





#### 8.3 Delete contact

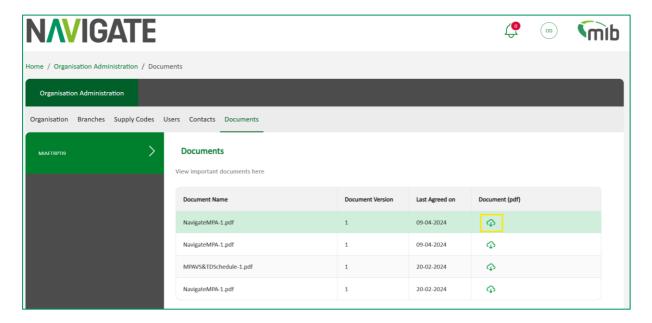
If you need to delete a contact, select **Edit**, which will open the **Contact View** in edit mode. An additional button at the bottom of the page will appear and select **Delete** to delete this contact. You'll be presented with an additional pop-up to confirm this change. Please note that not all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



#### 9 Documents

Within Documents, you'll find a list of important documents your organisation has accepted or requires access to. Here you'll find documents such as user agreements and schedules.

To view a document, click download.



# **10 Getting Support**

#### 10.1 Finding further information when you're using the Navigate portal

Click **Help** within Navigate, and then select **Help Centre** to access:

- FAQs
- User Guide and Quick Start Guides
- Video Demos

#### 10.2 Using the Contact Support form in Navigate

If you're unable to locate the information you require via the Help Centre, click **Contact Support** and complete the form to send us a question or report an issue.

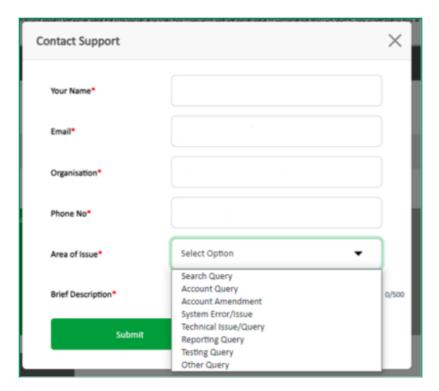
When you're signed into the **Navigate portal**, the form will have your contact details already filled in. If you're <u>not</u> signed in, you'll need to complete those fields.

Let the MIB's Support Team know what help you need by selecting Area of Issue.

Give as much detail as possible including:

The service you need help with (MIPD, VS&TD or Org Admin)

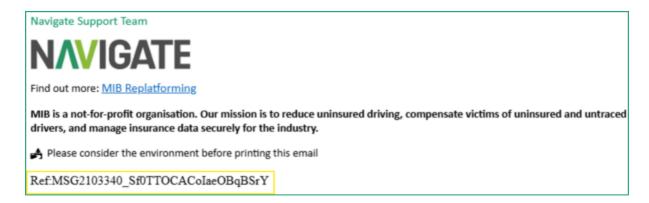
- The task you attempted to complete
- Any file/ claim references/ VRM
- Screenshots of the issue (if you aren't logged in, you can email after submitting)



If you're signed in, you'll see your reference number on screen after submitting your request. You'll also receive an email with your reference number for both logged in and non-logged in contact forms. This email will come from <a href="mib@service-now.com">mib@service-now.com</a>. You must whitelist this email address to be able to receive updates about your support queries.

The Navigate Support Team will email you any responses from this email address and you'll be able to respond by replying directly to the emails.

**Please note**, for your response to be linked to your ticket, ensure you use the same email address you used to submit the ticket and the reference provided at bottom of the initial email remains.



# 11 Navigate User Roles

You can have roles assigned in multiple services, depending on how you use the Navigate portal.

# 11.1 Administration Roles

Role	What can you do?
Organisation Admin (Org Admin)	View all organisation details including
	contacts. Create, edit and manage all
	branches. Add, edit and manage all users
	across the organisation and its branches.
	Create Branch Admin users.
Branch Admin	View organisation and branch details. Edit
	branch information to their assigned
	branch. Add, edit and manage users within
	their branch. View all users across the
	organisation.

# 11.2 Motor Insurance Policy Data Roles

Role	What can you do?
Search	Search for a vehicle record on the database
	for own insurance and 3 <sup>rd</sup> 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.

# 11.3 Vehicle salvage & Theft Data Roles

Role	What can you do?
Limited Enquirer (prev. Enquirer)	Search a vehicle using VRM or VIN. View
	claim versions and vehicle audit trail.
Full Enquirer	Search claims using all fields. View claim
	versions and claim audit trail.
Limited Input User (prev. Branch User)	Insert or amend a claim. Search claims
	using all fields. View claim versions and
	claim audit trail.
Full Input User (prev. Input User)	Insert, amend or delete a claim. Search
	claims using all fields. View claim 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.