

# ETASS – Re

Admin Module



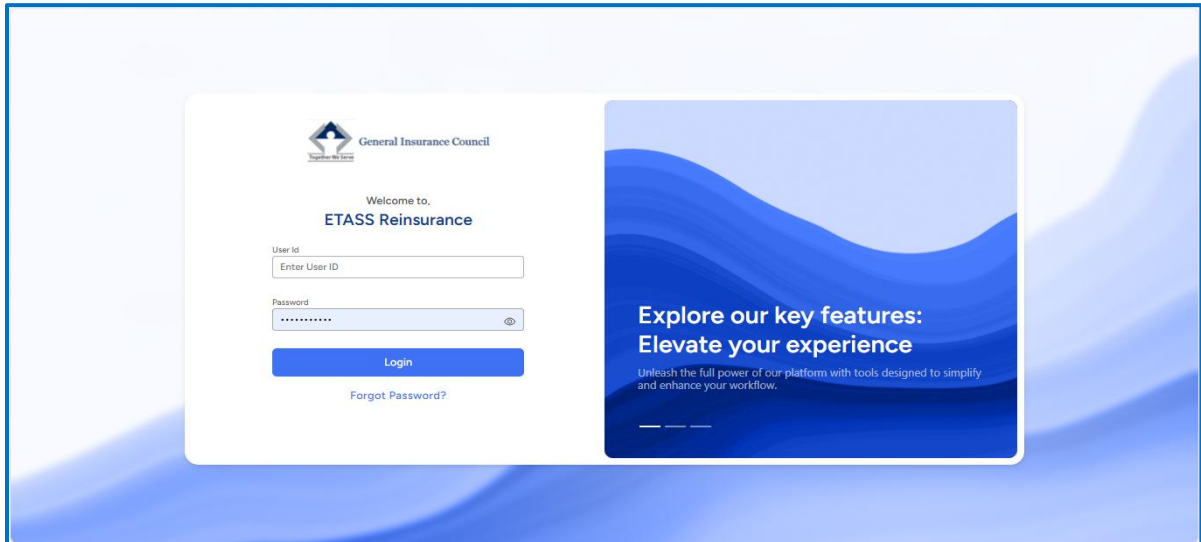
General Insurance Council

## Contents

<b>1. LOGIN PAGE .....</b>	<b>3</b>
<b>2. HOME PAGE .....</b>	<b>4</b>
<b>3. PASSWORD MANAGEMENT .....</b>	<b>6</b>
3.1. FORGOT PASSWORD .....	6
3.2. CHANGE PASSWORD .....	8
<b>4. GIC ADMIN ROLES AND RESPONSIBILITIES.....</b>	<b>10</b>
4.1. LOOKUP MASTER MODULE .....	11
4.2. COMPANY MANAGEMENT.....	14
4.3. OFFICE MASTER.....	16
4.4. USER MANAGEMENT .....	19
4.5. ACCESS CONTROL.....	21
4.6. COMPANY RENEWAL REQUEST .....	23
4.7. SYSTEM CONFIGURATION.....	26
<b>5. COMPANY ADMIN ROLES AND RESPONSIBILITIES .....</b>	<b>27</b>
5.1. COMPANY MANAGEMENT.....	28
5.2. USER MANAGEMENT .....	30
5.3. RENEWAL REQUEST .....	32
<b>6. OPERATIONAL USER ROLES AND RESPONSIBILITIES .....</b>	<b>36</b>
6.1. USER MANAGEMENT .....	37
6.2. COMPANY MANAGEMENT.....	38

## ETASSR User Guide for Admin Module

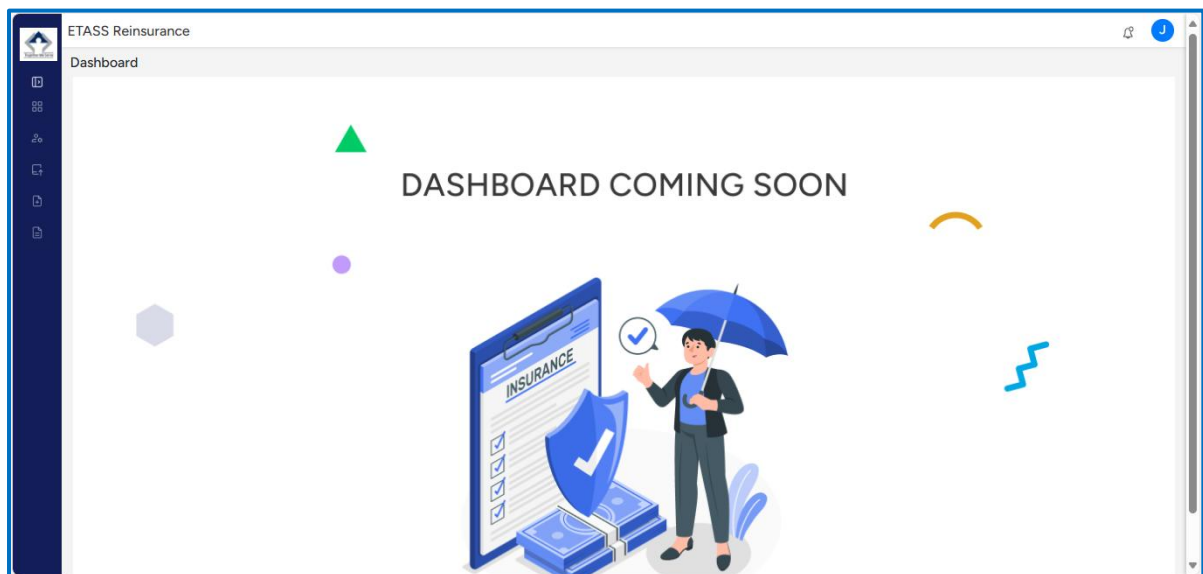
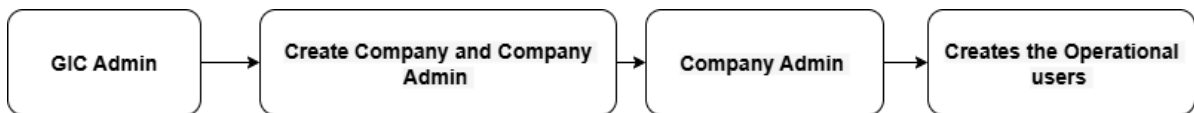
### 1. Login Page



The login page serves as the entry point to the ETASSR system where users authenticate their credentials to access the application.

## 2. Home Page

**Purpose:** Once the user has logged in, they are taken to the home screen. On this screen users can explore the menus of the application and user profile.




### Navigation Options:

1. **Expander:** Click on the Expander icon on the top left corner of home screen to expand/collapse menus.
2. **Dashboard:** To view the dashboard.
3. **Admin:** This menu and its sub menus are applicable only for Admin User.
4. **Actionable:** This will show all the actionable items for GIC Admin, Cedant, Broker and Reinsurer users.
5. **User Profile:** Click on the profile icon on the top right corner of home screen. Users can see their profile along with options to "Log out" and "Change Password".

ETASS Reinsurance


Dashboard





DASHBOARD COMING SOON



User profile

[View profile](#)

 Jeetu Nagdev [Log out](#)

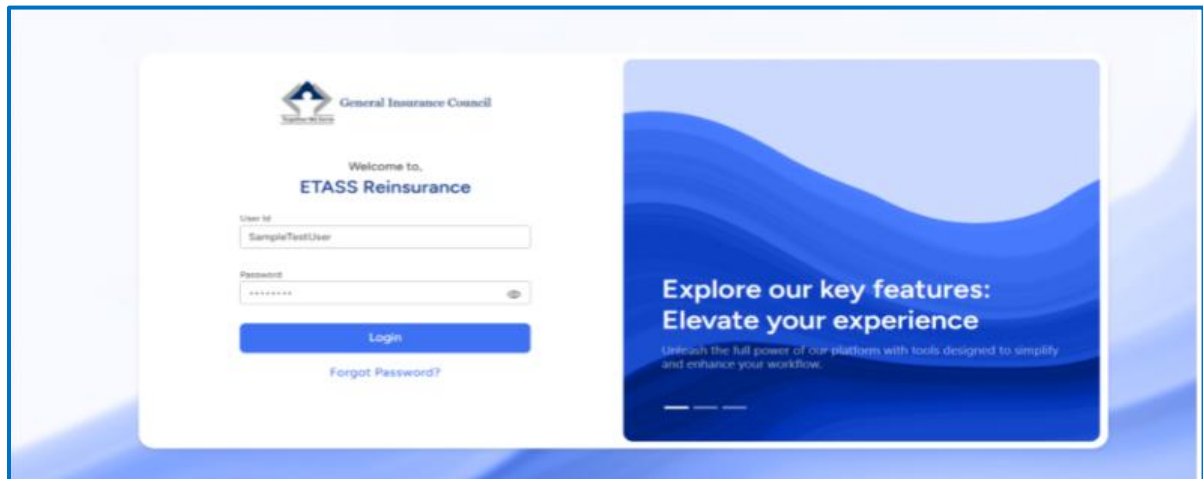
-  Role : Admin
-  Last logged in: 11 Sep 2025
-  Office : Mumbai
-  Company details: Kiya Insurance

[Change Password](#)  
Last password changed on 16 Apr 2025

### 3. Password Management

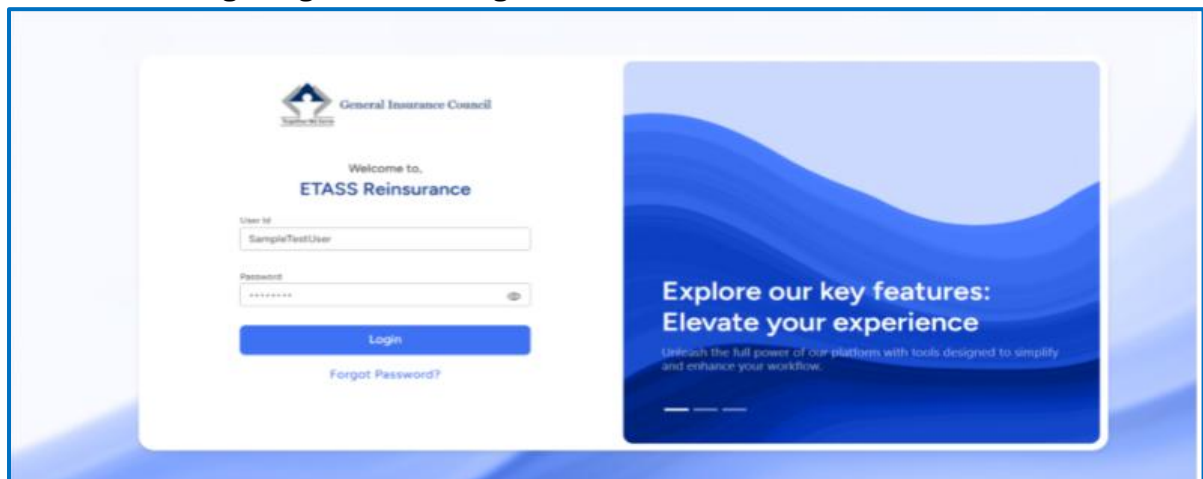
#### 3.1. Forgot Password

**Purpose:** The **Forgot Password** feature allows both entity and GIC users to securely reset their password if they cannot remember their current login credentials. This feature helps maintain uninterrupted access to the portal while ensuring security protocols are followed.

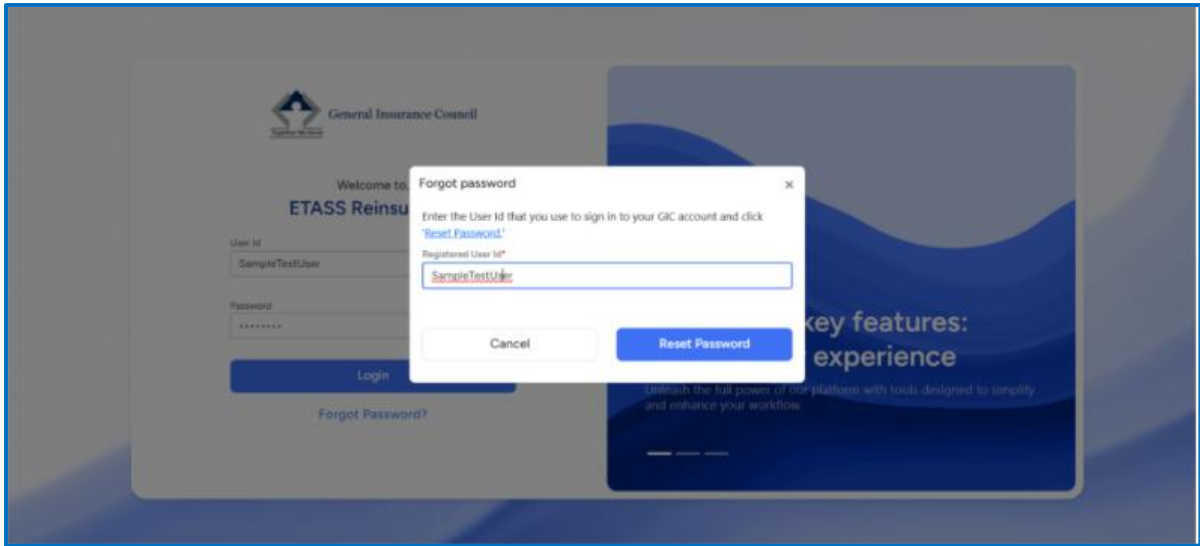


#### Steps: Forgot Password

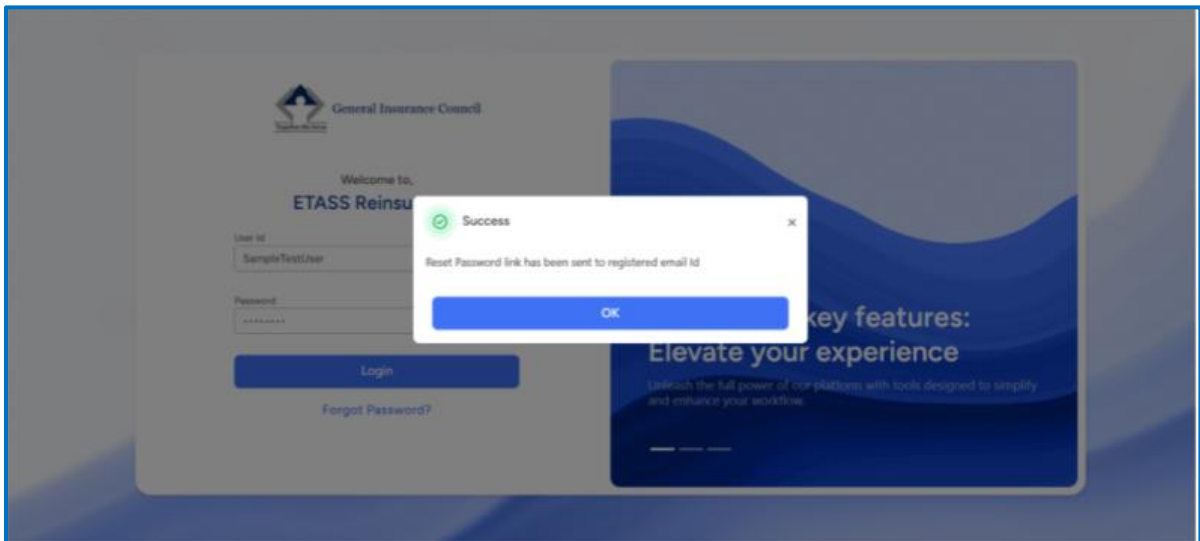
- On the Login Page, click the Forgot Password link.



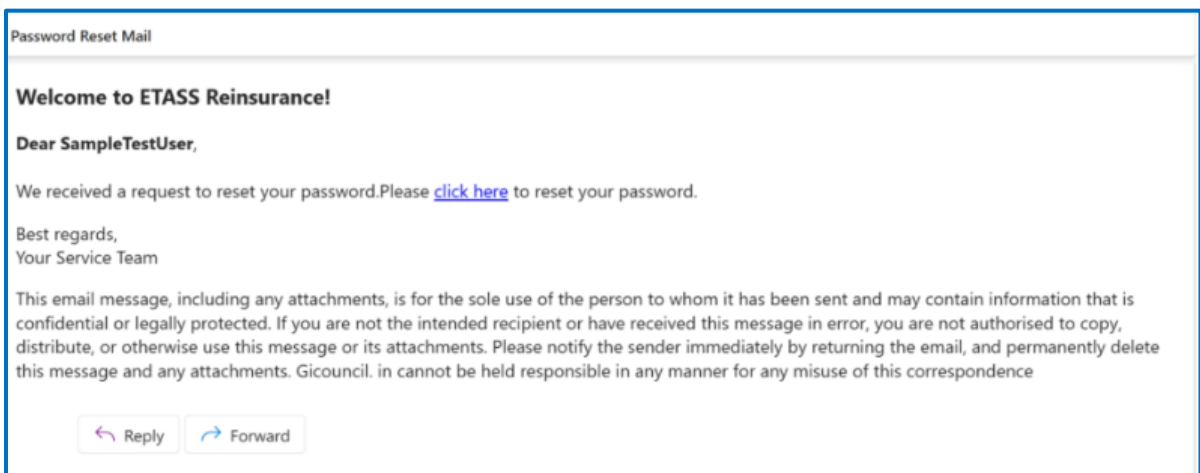
- A popup window will appear prompting you to enter your registered User ID associated with your account.
- Enter your User ID and click the Reset Password button.



- An email will be sent to your registered email address containing a secure link.



- Open the email and click the password reset link.



- Follow the instructions on the password reset page to create and confirm a new password.

- After entering and confirming the new password, click Submit.
- The system will update your password successfully.
- You can now use the new password to log in to the ETASS-Re Portal.

The screenshot shows a web form titled "Create New Password" from the "General Insurance Council". The form contains the following elements:

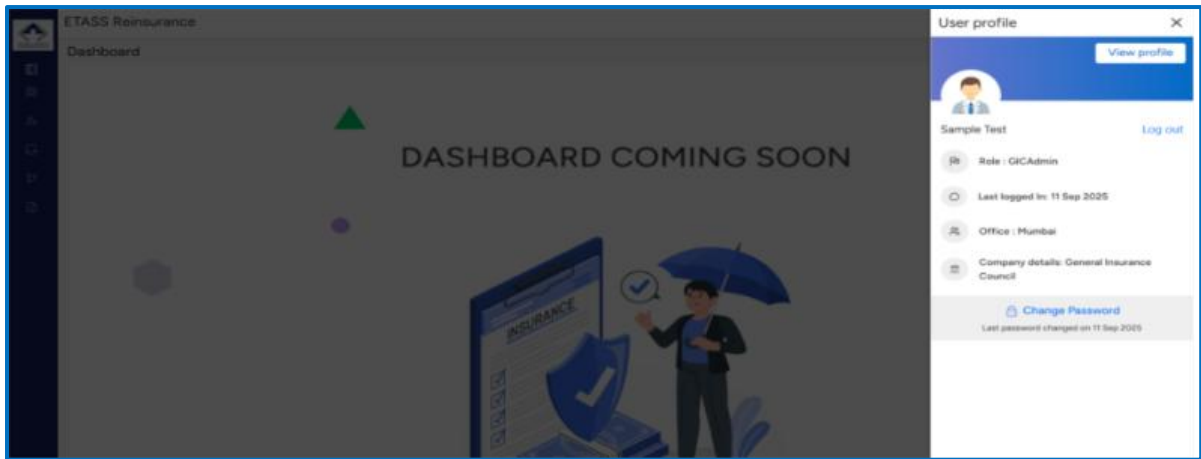
- User ID:** A text input field containing "SampleTestUser".
- New Password \*:** A text input field with the placeholder "Create your password" and a visibility toggle icon.
- Re-enter new password \*:** A text input field with the placeholder "Re-enter your password" and a visibility toggle icon.
- Password policy:** A list of six requirements:
  1. Password must not be empty
  2. Password must be 8 to 12 characters
  3. Password must have minimum 1 lower case
  4. Password must have minimum 1 upper case
  5. Password must have minimum 1 number
  6. Password must have minimum 1 special character
- Buttons:** "Cancel" and "Submit" buttons located at the bottom right of the form.

### 3.2. Change Password

**Purpose:** The **Change Password** feature allows both GIC and entity users to securely update their passwords after logging into the portal. This functionality is essential for maintaining account security and enabling users to manage their login credentials proactively.

#### **Steps: Change Password**

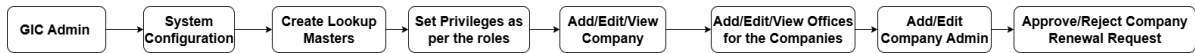
- After successfully logging into the portal, navigate to your User Profile section (usually accessible from the top-right corner of the dashboard).



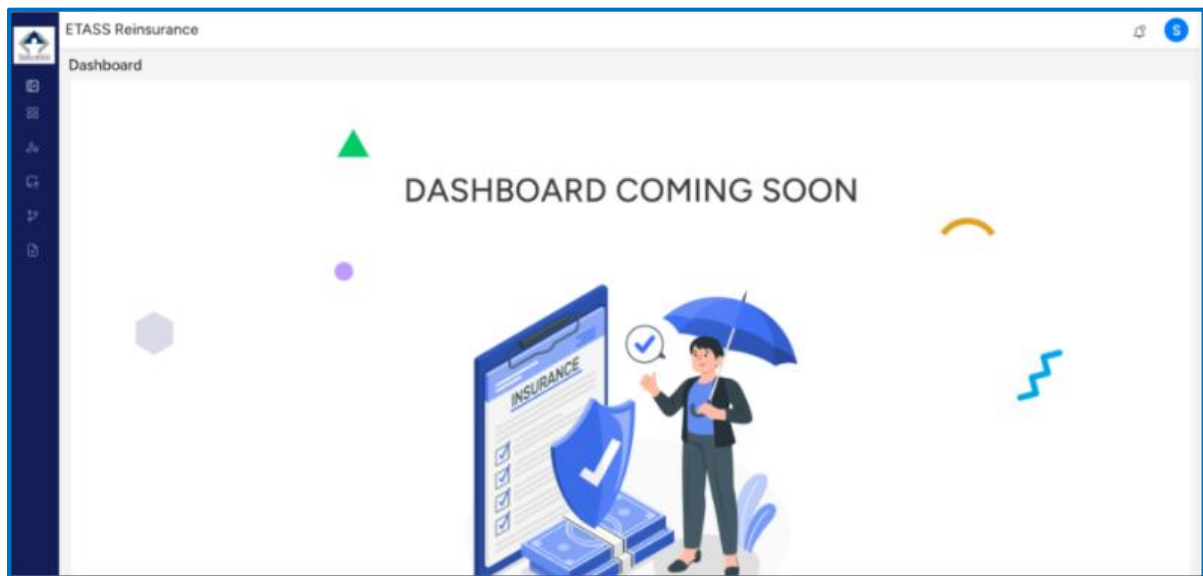
- Click on the Change Password link.
- The Change Password form will appear, prompting you to enter the following:
- **Current Password**
- **New Password**
- **Confirm New Password**
- Enter the required details, ensuring the new password complies with the portal's password complexity rules, which typically include:
- A minimum number of characters (e.g., at least 8 characters)
- A mix of **uppercase** and **lowercase letters**
- At least **one number**
- At least **one special character** (e.g., !, @, #, \$)
- Click Save to update your password.
- A confirmation message will appear indicating that your password has been successfully changed.

## 4. GIC Admin Roles and Responsibilities

The **GIC Admin** plays a foundational role in setting up and managing entities within the ETASS-Re Portal. Their responsibilities ensure the system is configured correctly before handing access over to entity-level administrators.

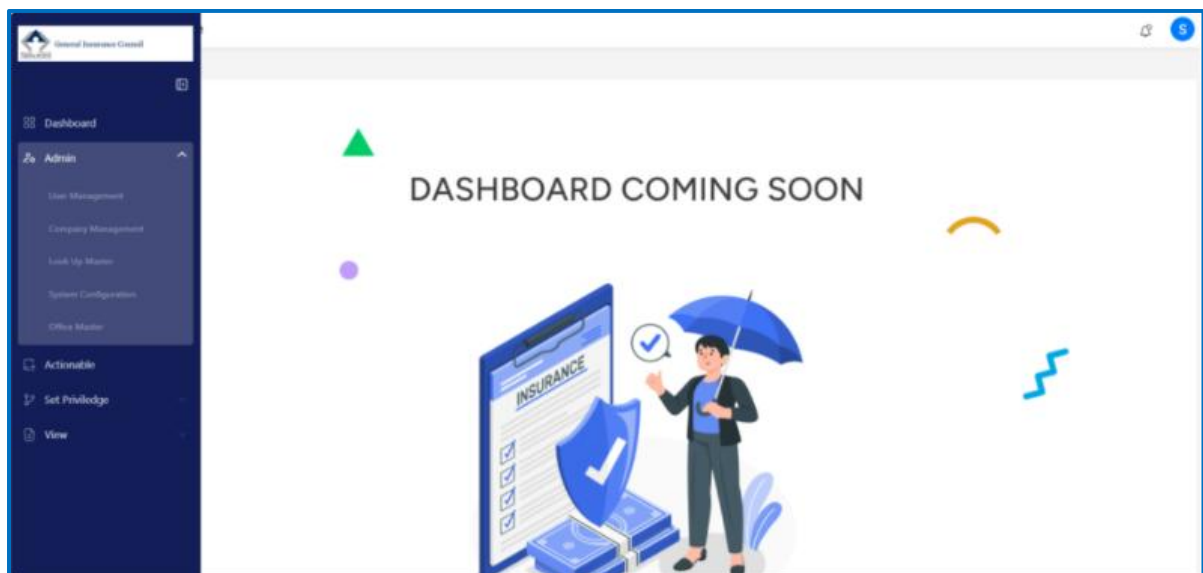


The GIC Admin user will log in through their user ID and password, and on success they will be redirected to the dashboard.



Dashboards will be displayed with the main menu on the left side.

- Click on Admin from the left side menu bar.



## 4.1. Lookup Master Module

**Purpose:** The **Lookup Master** module is a critical component of the ETASS-Re Portal, exclusively accessible to **GIC Admins**. It allows for the creation, management, and maintenance of essential master data that supports the system's overall operation. This ensures standardized data definitions across the portal, enhancing data integrity and consistency.

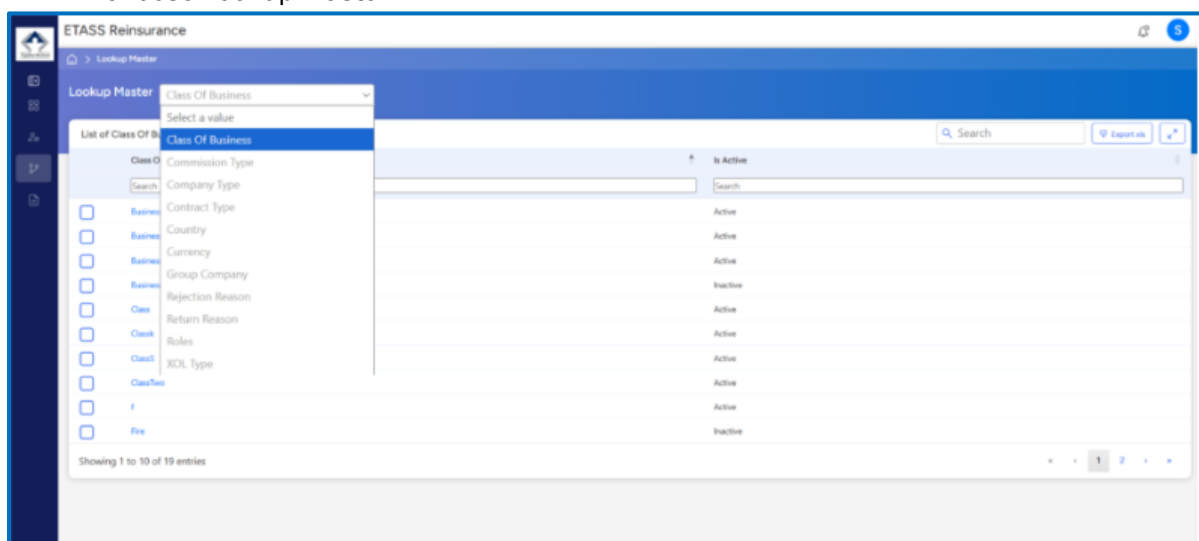
**Note:** Access to this module is restricted to GIC Admin users. Entity Admins and other operational users have **view-only** permissions.

The module manages the following key lookup categories:

- Class of Business
- Commission Type
- Company Type
- Contract Type
- Country
- Currency
- Group Company
- Rejection Reason
- Return Reason
- Roles
- XOL Type

### Steps: Create Lookup Master

- Click on Menu.
- Select Admin.
- Choose Lookup Master.

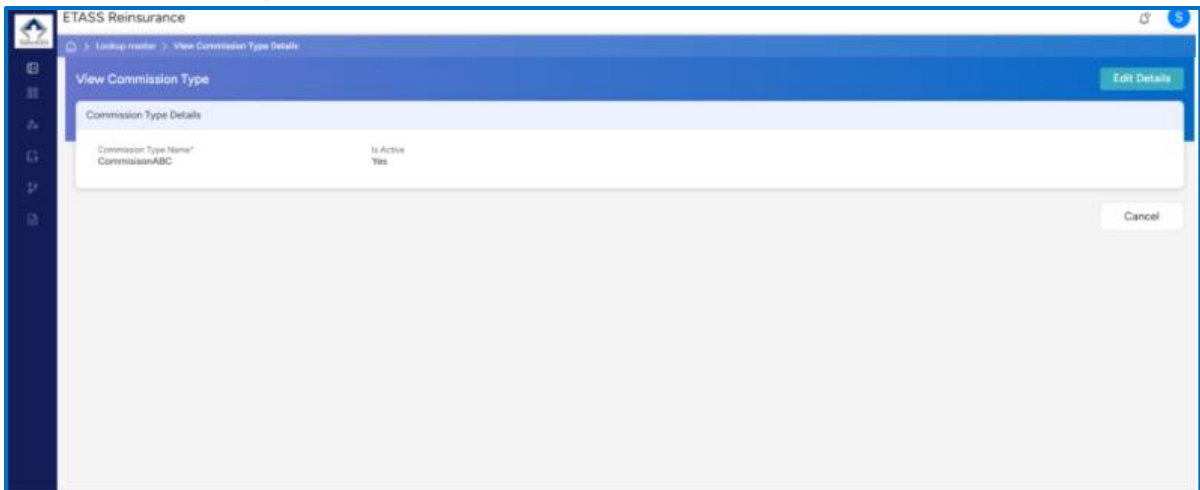


- Use the dropdown menu labeled “Select a value” at the top of the interface.
- Select the desired lookup category (e.g., Class of Business).
- The records table will refresh to display entries related to the selected category.
- The table displays lookup records with columns typically including:
- **Name/Code**
- **Status** (Active/Inactive)
- Features include:
- **Search:** Use the search box to find specific entries instantly.
- **Sort:** Click column headers to sort records.
- **Filter:** Filter records by Active/Inactive status.
- **Pagination:** Navigate through multiple pages of records.
- Click Export XLS to download the currently displayed data as an Excel spreadsheet.
- Click the Add Details icon on the Lookup Master list page.
- The Add New Master Details page will open.

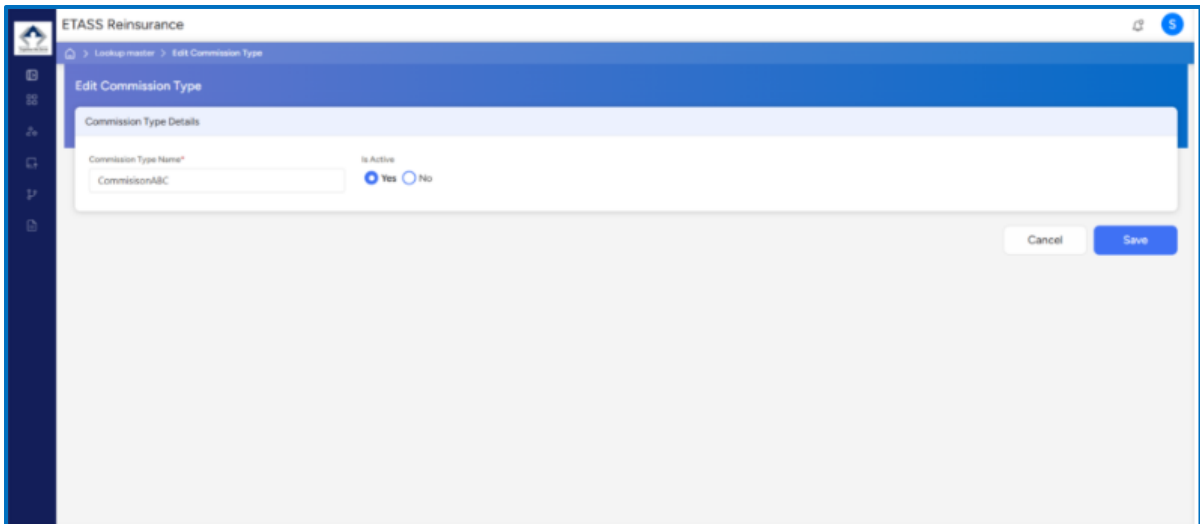
- Enter all the required information.
- Click Save to add the new record or cancel to discard changes.

**Note:** All mandatory fields must be completed before saving.

- Clicking a record opens a View Details page, showing information in read-only mode with Edit Details option.



- By clicking on Edit Details, the user can modify the existing lookup master details.
- Clicking Cancel will navigate the user back to the Lookup Master view page.



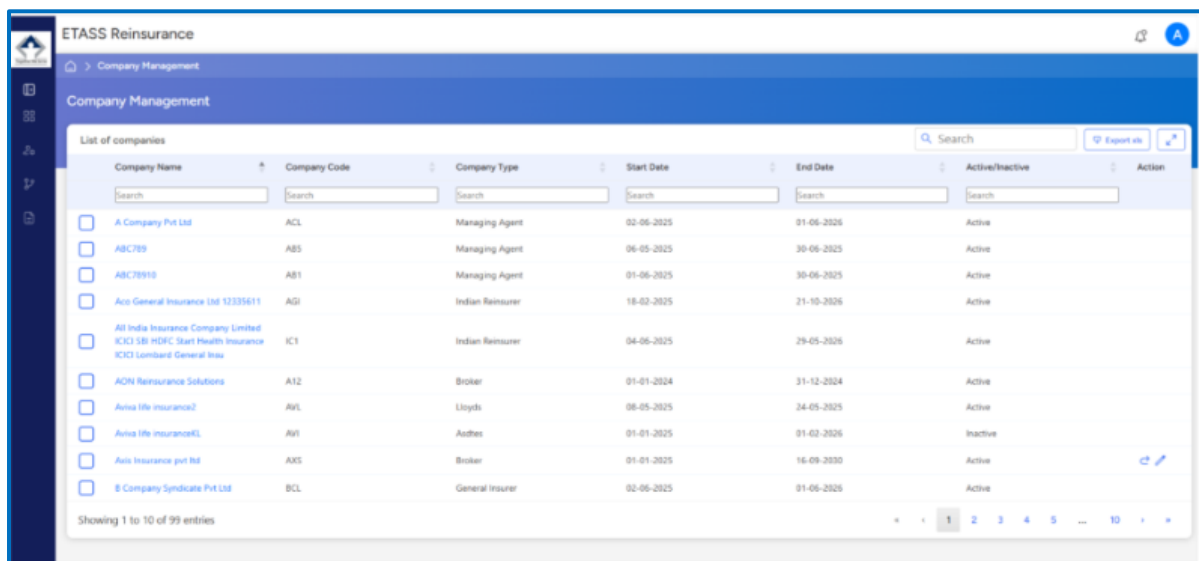
- Modify the record details on the Edit Lookup Master Type.
- Click Save to update or cancel to discard changes.

## 4.2. Company Management


**Purpose:** The **Company Management** module enables the **GIC Admin** to manage and oversee all entities participating in the ETASS-Re Portal. This module allows the admin to add, edit, view, and export company details efficiently.

### Steps: Create a company

- Click on Menu.
- Select Admin.
- Click on Company Management.
- All added companies are displayed in a grid view format.



The screenshot displays the ETASS Reinsurance Company Management interface. The page title is "ETASS Reinsurance" and the sub-page is "Company Management". Below the header, there is a "List of companies" section with a search bar and an "Export xls" button. The main content is a table with the following columns: Company Name, Company Code, Company Type, Start Date, End Date, Active/Inactive, and Action. The table contains 10 rows of data, each with a checkbox in the first column. The data is as follows:

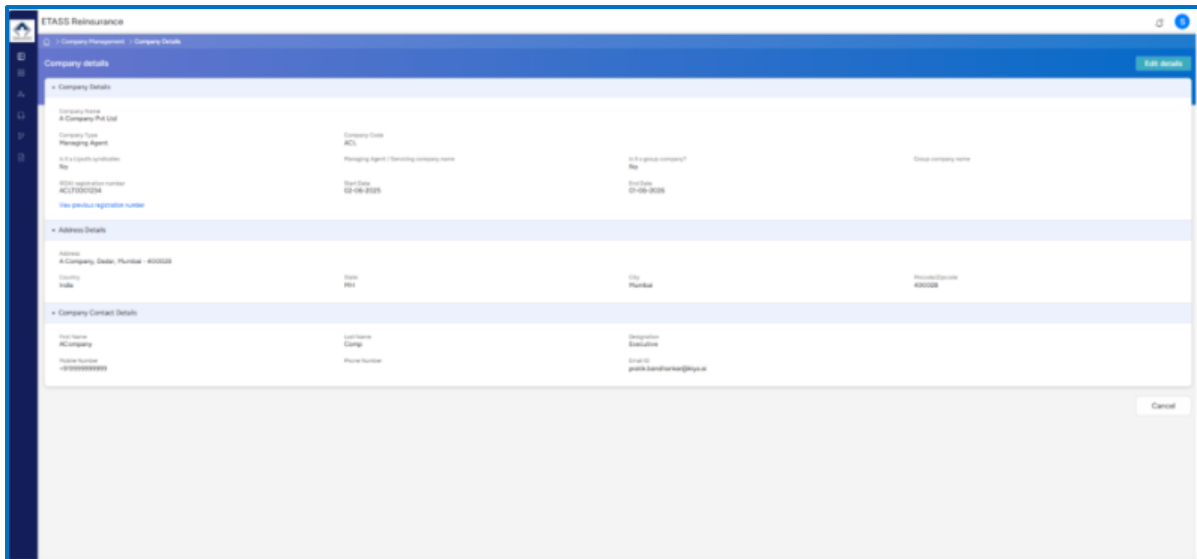
Company Name	Company Code	Company Type	Start Date	End Date	Active/Inactive	Action
<input type="checkbox"/> A Company Pvt Ltd	ACL	Managing Agent	02-06-2025	01-06-2026	Active	
<input type="checkbox"/> ABC789	AB5	Managing Agent	06-05-2025	30-06-2025	Active	
<input type="checkbox"/> ABC78910	AB1	Managing Agent	01-06-2025	30-06-2025	Active	
<input type="checkbox"/> Aco General Insurance Ltd 12335611	AGI	Indian Reinsurer	18-02-2025	21-10-2026	Active	
<input type="checkbox"/> All India Insurance Company Limited ICICI SBI HDFC Star Health Insurance ICICI Lombard General Ins	ICI	Indian Reinsurer	04-05-2025	29-05-2026	Active	
<input type="checkbox"/> AON Reinsurance Solutions	ATI	Broker	01-01-2024	31-12-2024	Active	
<input type="checkbox"/> Aviva life insurance2	AVL	Lloyds	08-05-2025	24-05-2025	Active	
<input type="checkbox"/> Aviva life insuranceEL	AVL	Aothes	01-01-2025	01-02-2026	Inactive	
<input type="checkbox"/> Axis Insurance prii ltd	AXS	Broker	01-01-2025	16-09-2030	Active	
<input type="checkbox"/> B Company Syndicate Pvt Ltd	BCL	General Insurer	02-06-2025	01-06-2025	Active	

At the bottom of the table, it says "Showing 1 to 10 of 99 entries". There are pagination controls at the bottom right, showing page 1 of 10.

- The grid supports:
- **Search:** Use the search box to find companies by name or other details.
- **Sorting:** Click on column headers to sort records.
- **Pagination:** Navigate through pages using the controls at the bottom right.
- **Entries per Page:** Select the number of entries shown per page from the bottom left.
- Minimize/Maximize Grid: Use the minimize/maximize icon to adjust the grid view size.
- Click the Export XLS icon to export all company details currently displayed in the grid to an Excel file.
- Select one or more companies using checkboxes and click the Download icon to export only the selected company details.
- Clicking on New Company, a form will open where the user will add company details.
- Fill in the required company details on the form that opens.

- Click Save to add the new company to the system.
- Click Cancel to discard changes and return to the company grid view.
- Click the Edit icon next to the company you wish to modify in the grid.

- Update the necessary fields in the form that opens.
- Click Save to save the edited details.
- Click Cancel to discard changes and return to the company grid view.
- Click on the Company Name in the grid to open the View Company Details page.



- On this page, users can:
- Review detailed company information.
- Click **Edit Company** to modify details.
- Click **View Previous Registration Numbers** to see the history of IRDAI registration numbers, including start and end dates.

**Note:**

- When a company's validity expires, users will receive a pop-up notification upon login.
- After expiration, the user's access will be restricted to raising a renewal request only; all other functionalities will be disabled until renewal is completed.

### 4.3. Office Master

**Purpose:** The **Office Master** module allows administrators to manage detailed records of all company offices within the ETASS Reinsurance system. It provides a centralized interface to view, add, edit, and export office-related data efficiently.

**Note:**

- GIC Admins have full access to view, add, and edit records.
- Company Admins and other operational users have view-only permissions.

**Steps: Create company's office**

- Click Menu.
- Select Admin.
- Choose Office Master.

- All office records are displayed in a grid view.

Company Name	Office Name	Office Code	Address	Mobile Number	Email	Active / Inactive	Action
Clare Re	Pune Bazar	CHZ	MUMBAI 41001021	0705464646	prajot.kamble@kyusai	Active	
D Company Pvt Ltd	Mumbai	DCL	D Company Datar, Mumbai - 400028	9999999999	pratik.bhandarkar@kyusai	Active	
Future Generali	Mumbai	FG				Active	
Future Generali	Pune	FGP				Active	
Future Generali	9999	9999				Active	
Future Generali	Mumbai	FGD	SANDS	0999999999	Mumbai@DCLL	Active	
Future Generali	MumbaiD	SM	VDSVDF	7467811953	Mumbai@DCLL	Active	
Future Generali	9999	9999	9999	0123456789	sandesh.palwale@kyusai	Active	
Future Generali	dasas	GD	9999	0999999999	sandesh.palwale@kyusai	Active	
Future Generali	dasas	FGS	9999	0000000000	sandesh.palwale@kyusai	Active	

Showing 31 to 40 of 107 entries

- Features include:
  - **Search:** Use the search box to quickly find offices.
  - **Sorting:** Click column headers to sort data.
  - **Pagination:** Navigate through multiple pages.
  - **Export XLS:** Export all office records displayed to an Excel file.
  - **Selective Export:** Select individual records with checkboxes and export only those to Excel.
  - Click the Add New Office icon on the grid page.

**Add New Office**

Office Details

Company Name\*  Office Code\*  Office Name\*  Is Active  Yes  No

Phone No   Email  Address

- Complete the New Office Master form with accurate and current information.
- Ensure all mandatory fields are filled.
- Set the correct Status to indicate if the office is operational.
- Click Save to add the new office.
- Click Cancel to discard changes and return to the office list.

- Click the Edit icon next to the desired office record.

The screenshot shows the 'Edit Office Details' form. The fields are as follows:

Company Name*	Office Code*	Office Name*	Is Active
bharatpay	MUM	Mumbai	<input checked="" type="radio"/> Yes <input type="radio"/> No
Phone No	Email	Address	
Please S <input type="text"/> Enter here	<input type="text"/> Enter here	<input type="text"/> Enter here	

Buttons: Cancel, Save

- Update the office information as needed, ensuring accuracy.
- Verify all mandatory fields are completed.
- Adjust the Status as appropriate.
- Click Save to update the office record.
- Click Cancel to discard changes and return to the office list.

The screenshot shows the 'View Office Details' page with the following data:

Company Name	Office Code	Office Name	Is Active
A Company Pvt Ltd	ACL	Mumbai	Yes
Phone No	Email	Address	
9999999999	pratik.bandharkar@kiya.ai	Mumbai, Dadar-400030	

Buttons: Edit Details, Cancel

- Clicking on any Company Name within the grid opens the View Office Details page.
- From here, users can see detailed information about the office.
- If authorized, users can click Edit Details to modify office data.

**Note:**

- Use accurate and up-to-date contact information to maintain effective communication.
- Always set the correct operational status to reflect the office's current status.

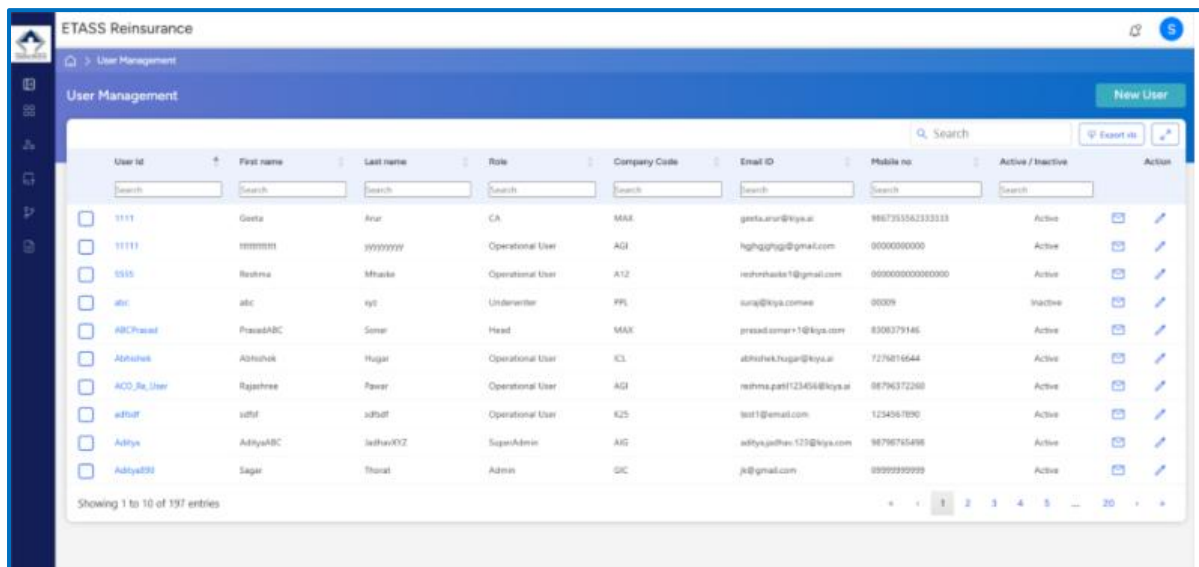
## 4.4. User Management

**Purpose:** The **User Management** module allows **GIC ADMIN** to manage users across **all organizations** in the system. This includes adding, editing, deactivating users, sending password setup links, and exporting user data.

**Note:** Before **Company Admin** can create Users, they must first **create Offices** under the **Office Master** menu.

**Steps: Create Admin user/User for the company**

- Click Menu.
- Select Admin.
- Choose User Management.

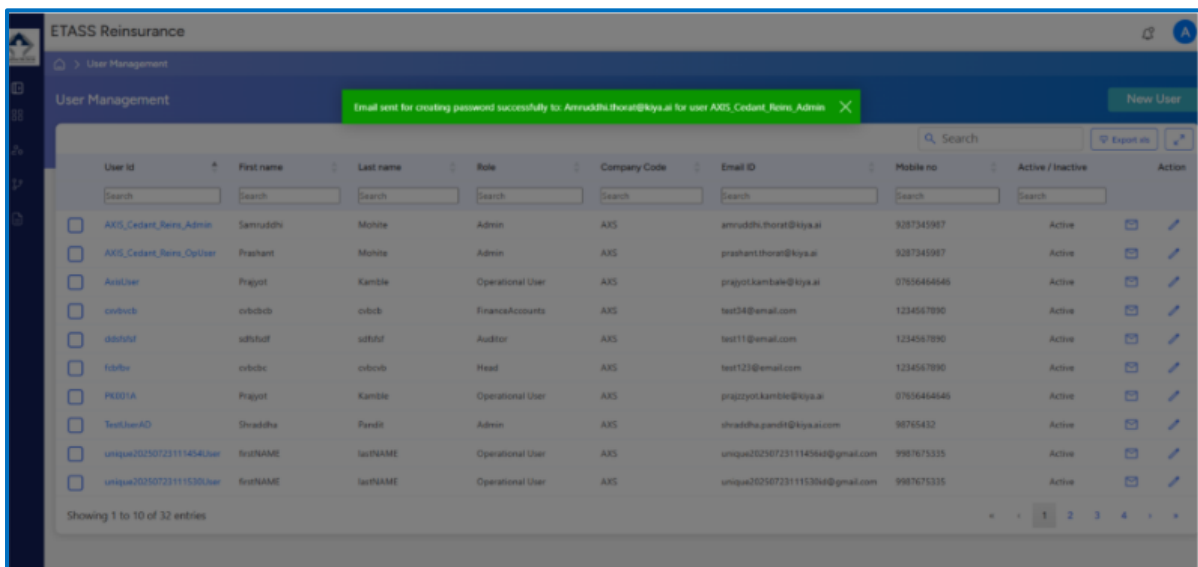


The screenshot displays the ETASS Reinsurance User Management interface. It features a table with the following columns: User ID, First name, Last name, Role, Company Code, Email ID, Mobile no, Active/Inactive, and Action. The table contains 10 rows of user data. A 'New User' button is visible in the top right corner. The interface also includes search and filter options for each column.

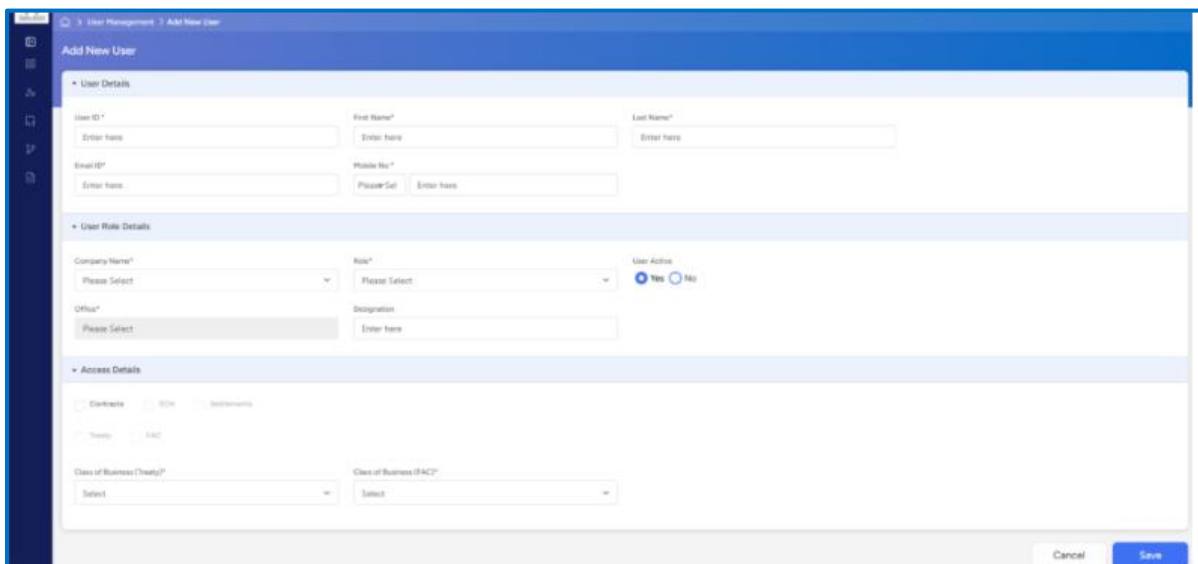
User ID	First name	Last name	Role	Company Code	Email ID	Mobile no	Active / Inactive	Action
1111	Guest	Arur	CA	MAX	guest.arur@kya.ai	88673356233333	Active	[Mail] [Edit]
1111	mmmmmm	yyyyyyyy	Operational User	AGI	hgghghgh@gmail.com	0000000000	Active	[Mail] [Edit]
5555	Roshma	Mhade	Operational User	AT2	roshma.mhade1@gmail.com	0000000000000000	Active	[Mail] [Edit]
abc	abc	xyz	Underwriter	PPL	abc@kya.com	0000	Inactive	[Mail] [Edit]
ABCPrasad	PrasadABC	Sene	Head	MAX	prasad.sene+1@kya.com	8300379146	Active	[Mail] [Edit]
Abhishek	Abhishek	Huger	Operational User	KCL	abhishek.huger@kya.ai	7276016644	Active	[Mail] [Edit]
ACD_Re_User	Rajashree	Pawar	Operational User	AGI	roshma.pati123456@kya.ai	08796372260	Active	[Mail] [Edit]
aditf	aditf	aditf	Operational User	K25	aditf@gmail.com	1234567890	Active	[Mail] [Edit]
Aditya	AdityaABC	aditfABC	SuperAdmin	AGI	aditya.aditf123@kya.com	9876543210	Active	[Mail] [Edit]
AdityaB99	Sagar	Thural	Admin	GIC	aditf@gmail.com	0000000000	Active	[Mail] [Edit]

- When the User Management page opens, all users are displayed in a Grid View with the following functionalities:
- **View All Users**
- **Global Search:** Search users using keywords.
- **Custom Filter:** Apply filters to narrow down user lists.
- **Add New User** (via **New User** button)
- **Edit Existing User** (via **Edit icon**)
- **Deactivate Users**
- **Export User Data** to Excel
- **Send Password Setup Link** (via **Mail icon**)
- **Bottom Right:** Number of pages available.

- **Bottom Left:** Entry range per page (e.g., "1 to 10 of 50 entries").
- Click **Minimize/Maximize icon** to resize the grid within the same window.
- **Export XLS** button: Downloads **all users** into an Excel file.
- **Select checkboxes** next to specific users and click the **Download icon** to export **only selected users**.
- Click on the **Mail icon** beside the user.
- A **password creation link** is sent to the user's registered email.
- A **Success Pop-up Message** appears.
- Click the **Cross (X)** on the pop-up to return to Grid View.



- Click the **New User** button.
- Fill out the form with user details.



- Click Save to add the user.
- Click Cancel to return to the User Management Grid View without saving.

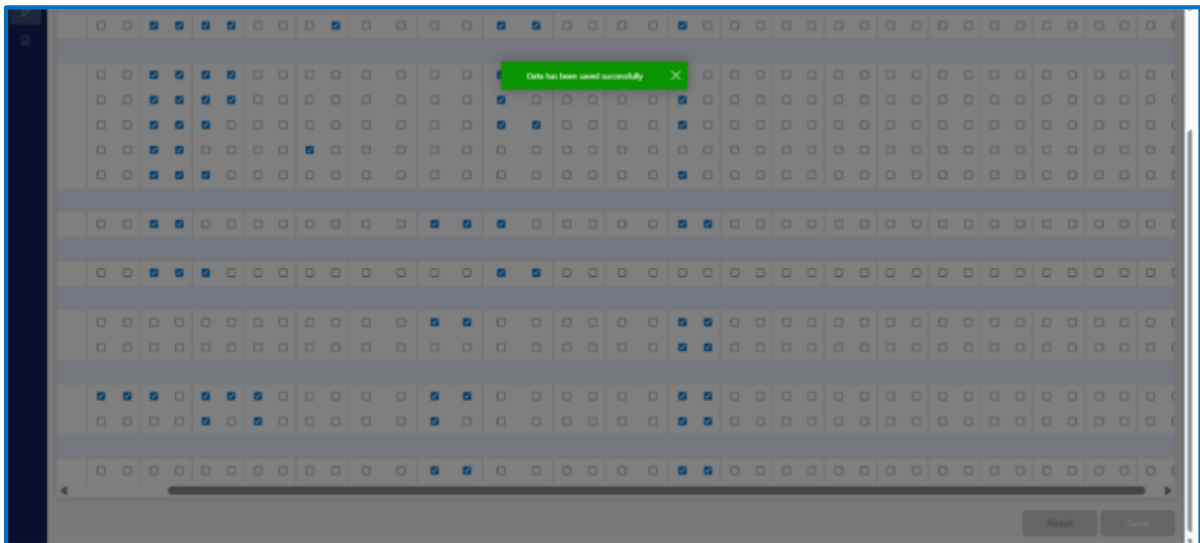
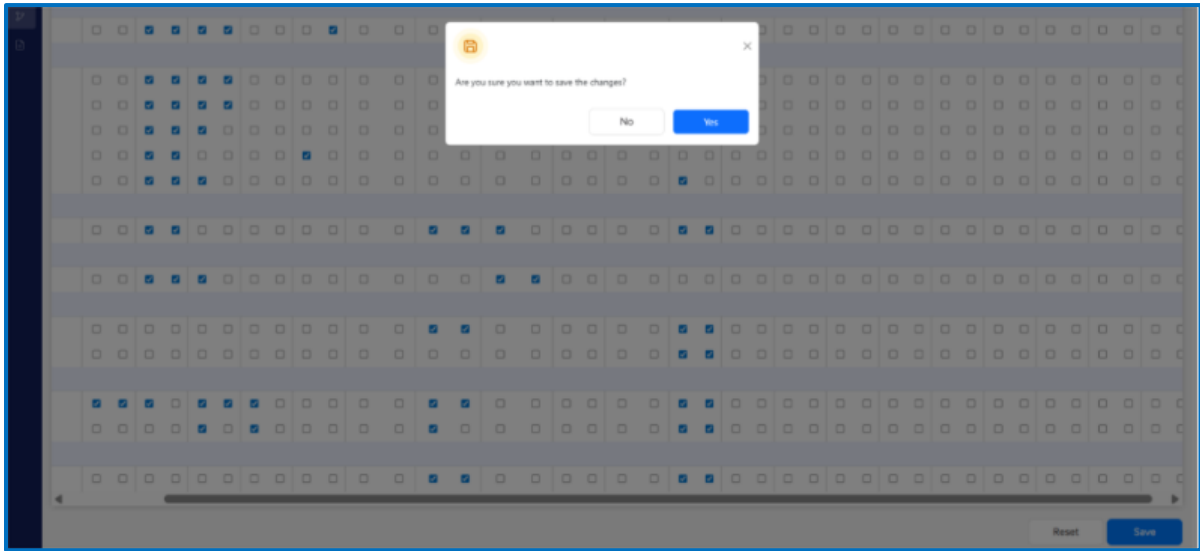
- Click the Edit icon in the grid next to the user.
- Save: Updates user details.
- Cancel: Returns to the User Management Grid View.
- Click on the User Id in the grid.
- The View User Details page opens.

- Click Edit Details to edit the user's information.
- Click Back to return to the User Management Grid View.

## 4.5. Access Control

**Purpose:** The **Access Control** module is a critical security feature within the **ETASS-Re Portal**. It enables administrators to **define, manage, and assign user roles** along with their associated **permissions**.





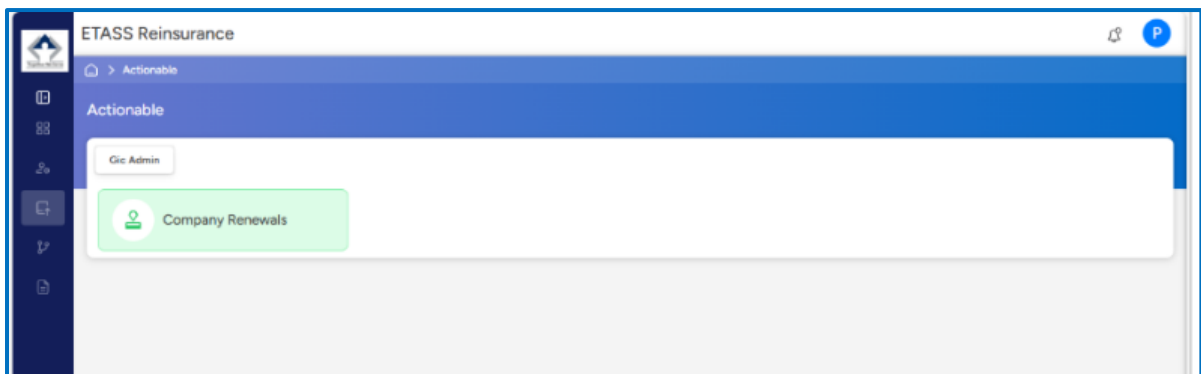
- After making changes, click Save to commit the updates to the system.
- To discard unsaved changes, click Reset to restore the last saved state.

#### 4.6. Company Renewal Request

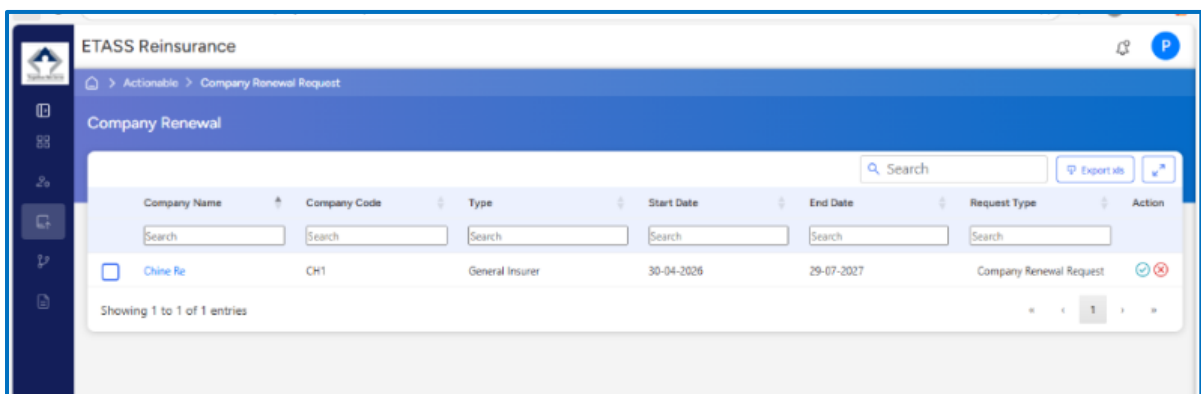
**Purpose:** A **GIC Admin** is responsible for reviewing company renewal requests submitted by the **Company Admin**, and either approving or rejecting these requests based on the provided details.

**Steps: Approve/Reject Company Renewal Request**

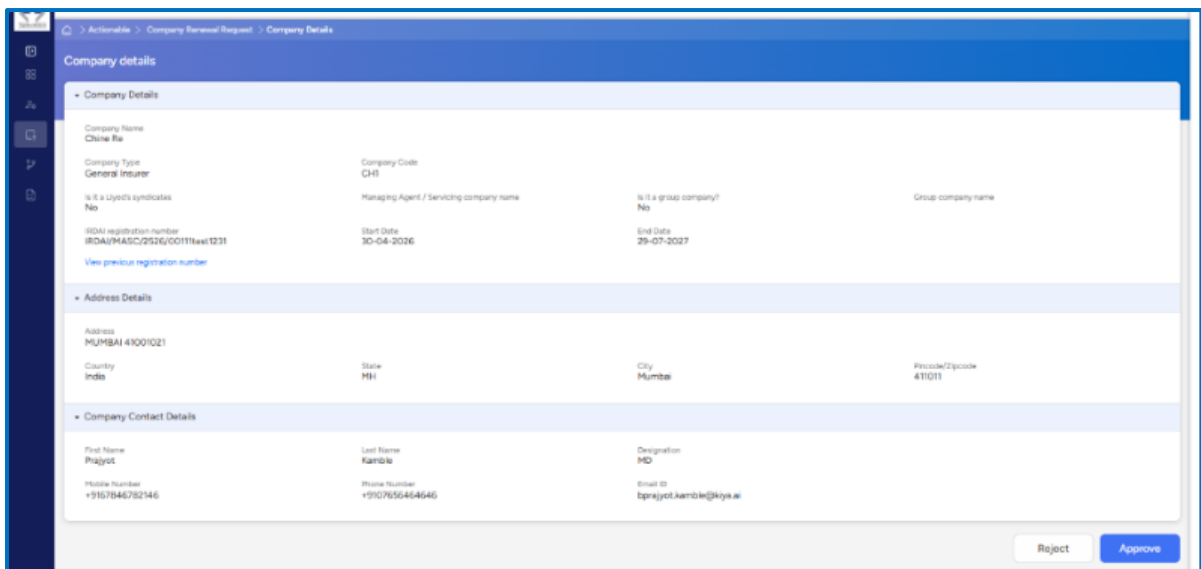
- Click on Menu.
- Click on Actionable
- Navigate to the Actionable page from the main menu.



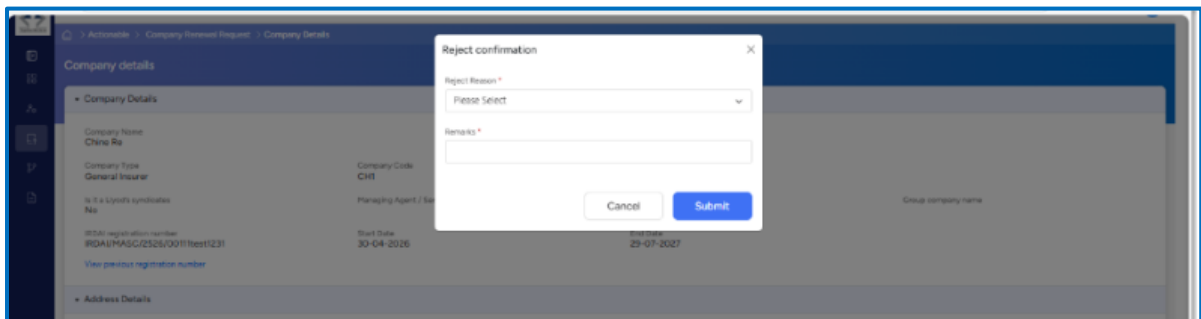
- Click on the Company Renewals section.



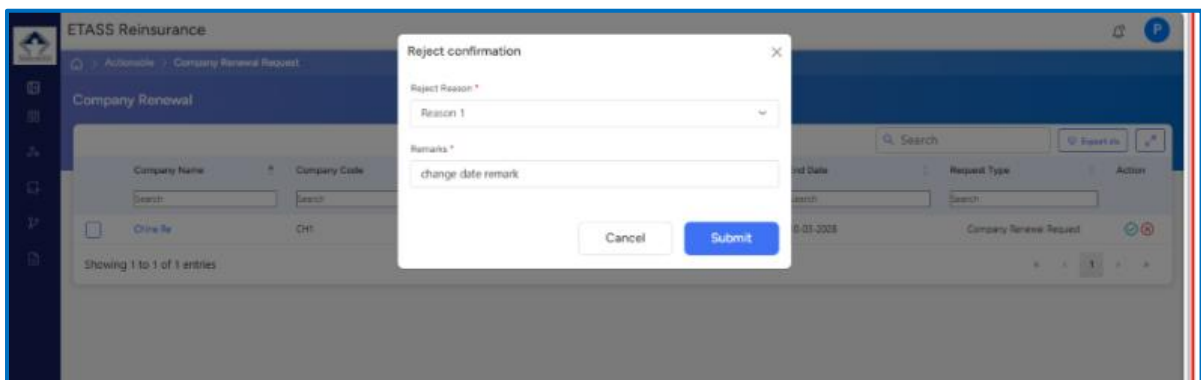
- A table will display all pending renewal requests with the following details:
- Company Name
- Company Code
- Type
- Start Date
- End Date
- Locate the request you want to process.
- In the Action column for that request, click the corresponding button to either approve or reject the request.



- If the request details are accurate and acceptable, click Approve.
- The request will be processed as approved.
- Click Reject next to the request you want to deny.



- Select a Reject Reason from the dropdown menu.
- Enter mandatory Remarks explaining the reason for rejection.



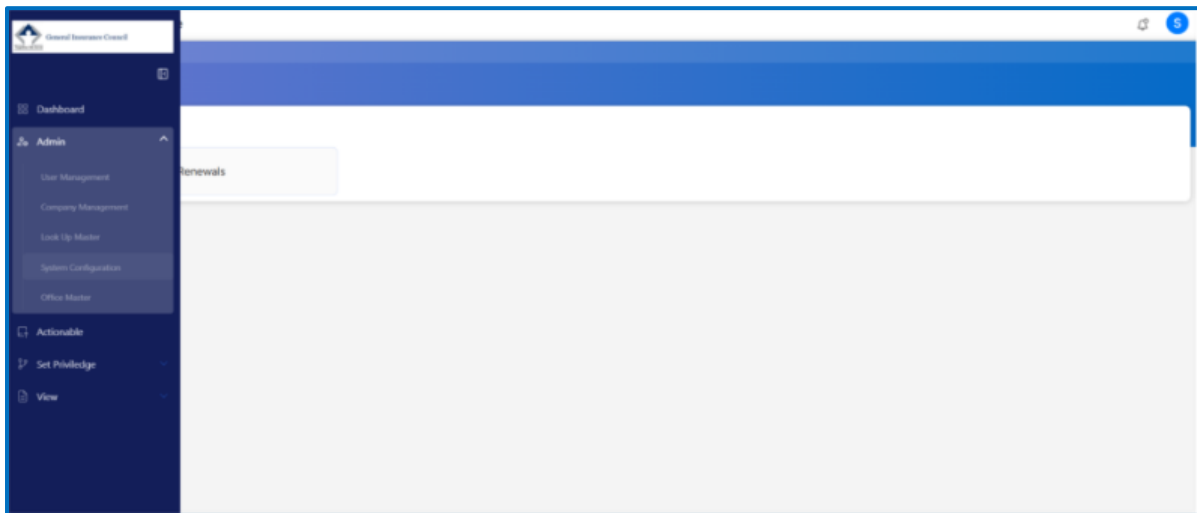
- Click Submit to finalize the rejection.

## 4.7. System Configuration

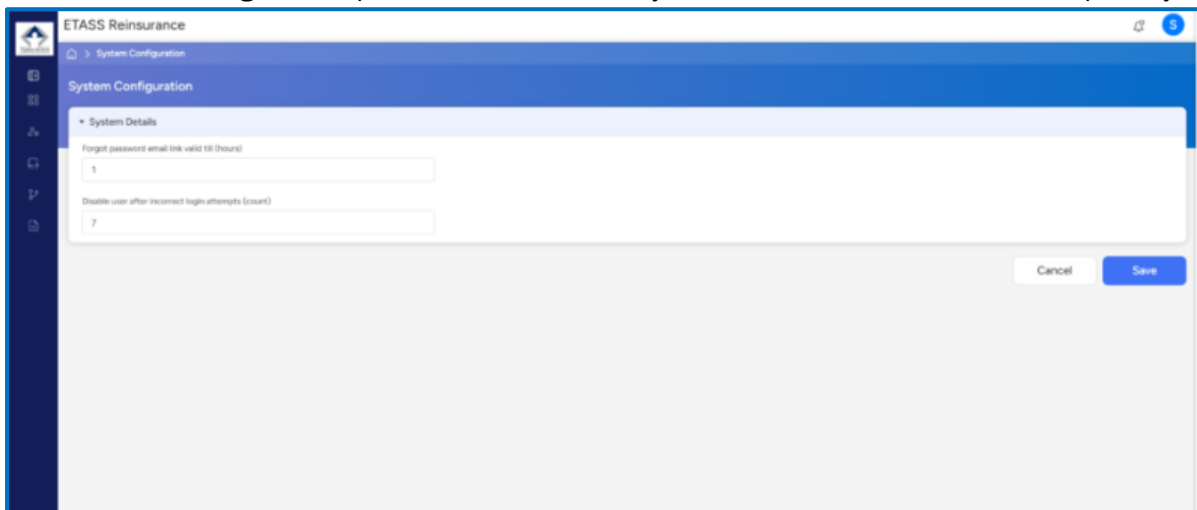
**Purpose:** The **System Configuration** section enables administrators to define key **security-related settings** for user authentication and password recovery. These configurations help protect user accounts and ensure secure access to the system.

### Steps: System Configuration

- Click on Menu.
- Select Admin.
- Click on System Configuration.



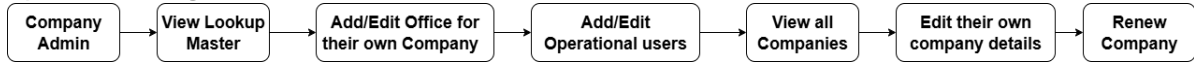
- **Forgot Password Email Link Validity (hours):** Enter the number of hours the password reset link sent via email should remain valid.
- **Block User After Incorrect Login Attempts (count):** Enter the number of consecutive incorrect login attempts allowed before the system blocks the user account temporarily.



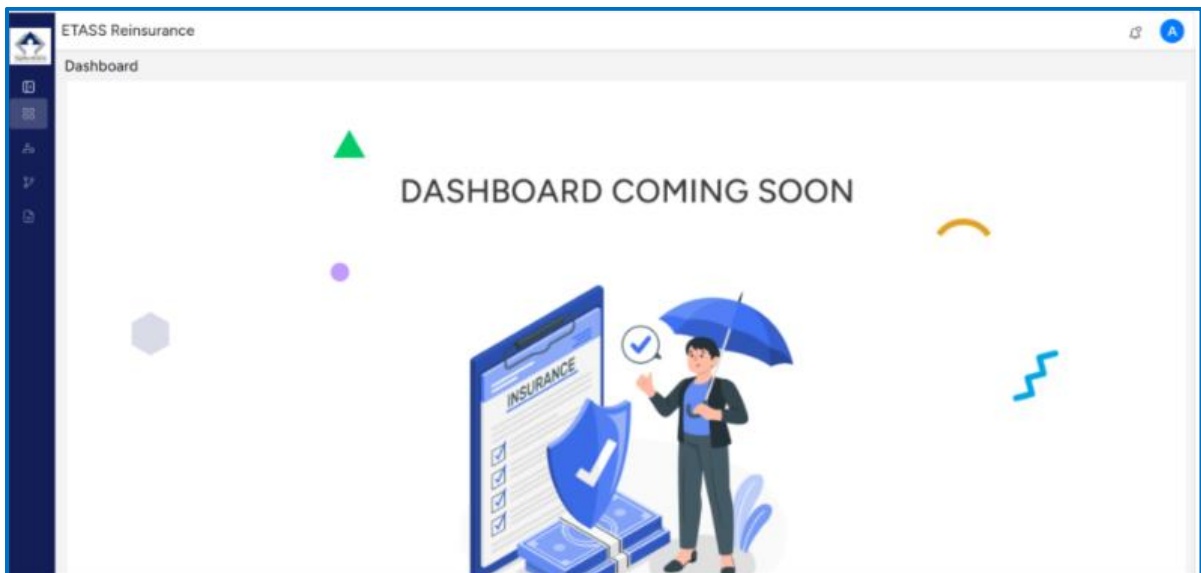
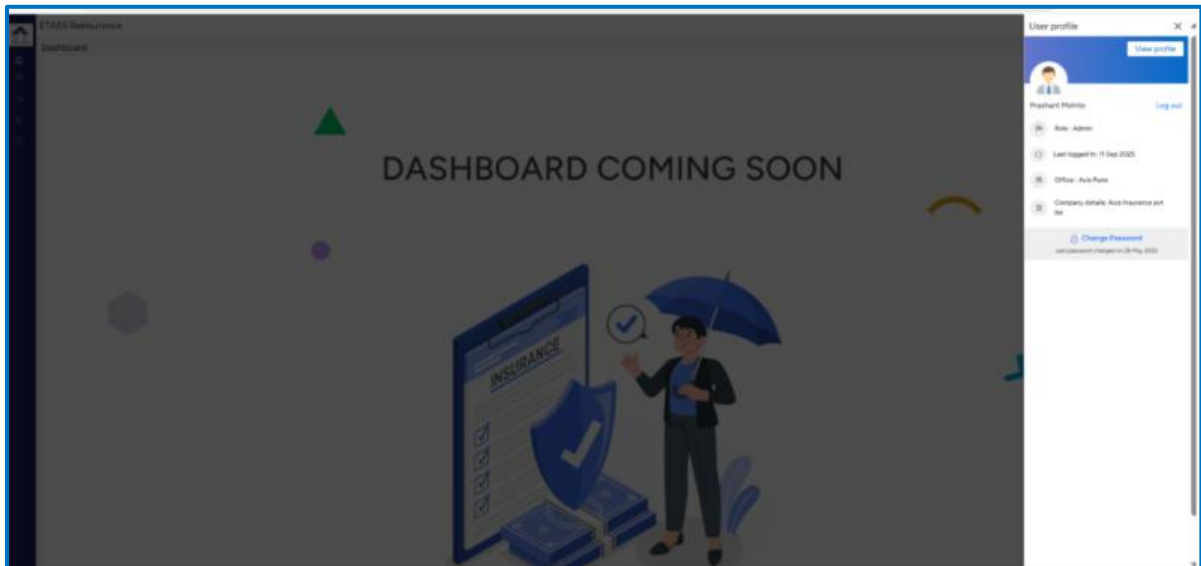
- Click Save to apply and store the updated configuration settings.
- Click Cancel to discard the changes and keep the previous settings.

## 5. Company Admin Roles and Responsibilities

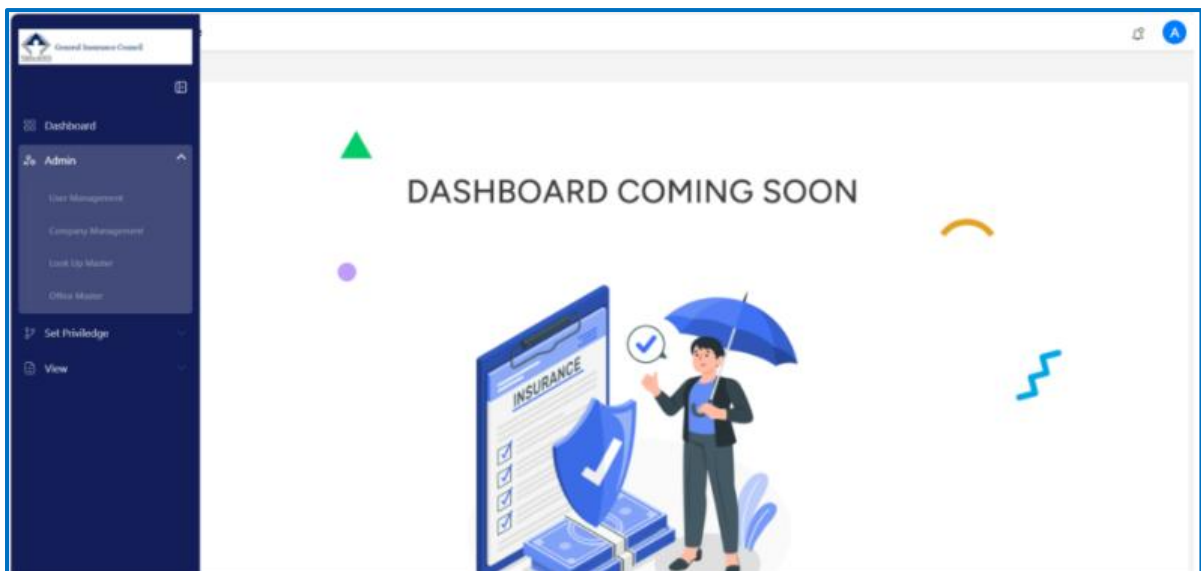
Company Admin users have **view-only access** to the **Lookup Master**, **Office Master**, and **Access Control** modules, meaning they can view entries but cannot modify them. Additionally, Company Admins **do not have any access**—neither view nor edit rights—to the **System Configuration** module.



When a Company Admin logs in using their user ID and password, they are redirected to the dashboard upon successful authentication.



The dashboard displays the main menu on the left side of the screen, where the user can click on **Admin** to access the relevant administrative options available to their role.



## 5.1. Company Management

**Purpose:** The Company Management module allows users to **view all companies** in a grid format but restricts editing and adding company details to only the user's own login company.

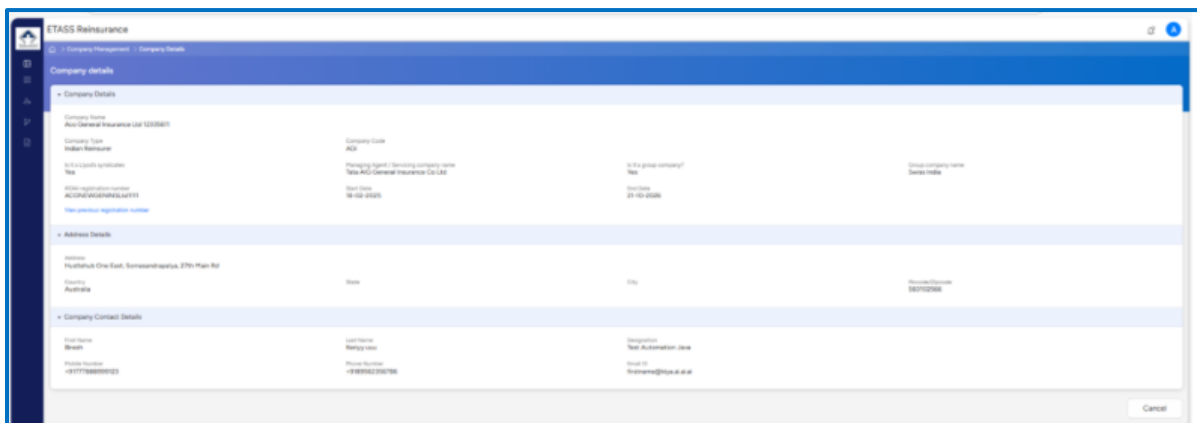
**Steps: View/Edit Company details**

- Click on Menu.
- Select Admin.
- Click on Company Management.

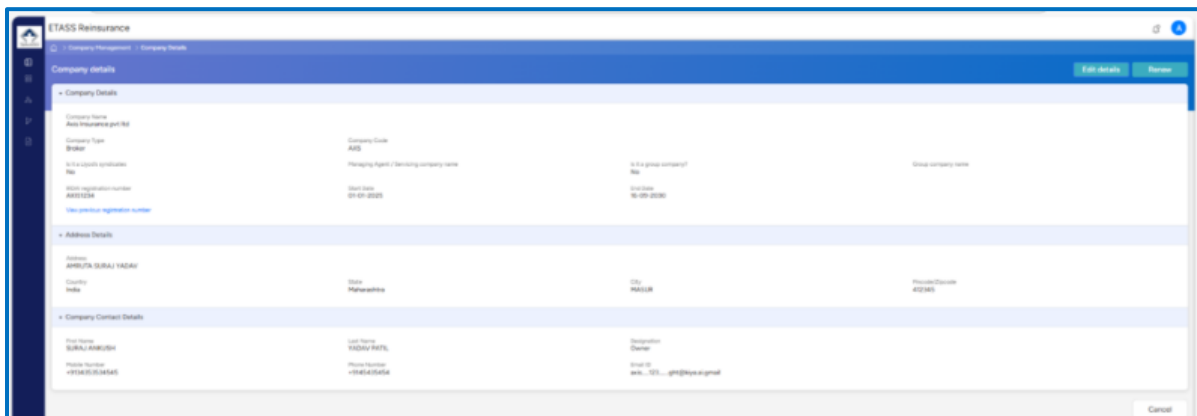
Company Name	Company Code	Company Type	Start Date	End Date	Active/Inactive	Action
<input type="checkbox"/> A Company Pvt Ltd	ACL	Managing Agent	02-06-2025	01-06-2025	Active	
<input type="checkbox"/> ABC789	AB5	Managing Agent	06-05-2025	30-06-2025	Active	
<input type="checkbox"/> ABC78910	AB1	Managing Agent	01-06-2025	30-06-2025	Active	
<input type="checkbox"/> Aco General Insurance Ltd 12335611	AGI	Indian Reinsurer	18-02-2025	21-10-2025	Active	
<input type="checkbox"/> All India Insurance Company Limited ICICI SBI HDIC, Star Health Insurance ICICI Lombard General Insu	IC1	Indian Reinsurer	04-06-2025	29-05-2026	Active	
<input type="checkbox"/> AON Reinsurance Solutions	A12	Broker	01-01-2024	31-12-2024	Active	
<input type="checkbox"/> Aviva life insurance2	AVL	Lloyds	08-05-2025	24-05-2025	Active	
<input type="checkbox"/> Aviva life insuranceKL	AVI	Aadhes	01-01-2025	01-02-2026	Inactive	
<input type="checkbox"/> Axis Insurance per ltd	AXS	Broker	01-01-2025	16-09-2030	Active	
<input type="checkbox"/> B Company Syndicate Pvt Ltd	BCL	General Insurer	02-06-2025	01-06-2025	Active	

- View all added companies listed in the grid view.
- Use the search option to find specific companies.
- Click the Export XLS icon to export details of all companies to an Excel file.
- Select one or more companies using checkboxes.

- Click the Download icon to export only the selected companies' details to Excel.
- Click the Minimize/Maximize icon to adjust the grid view size.
- Use the pagination control at the bottom right to navigate through pages.
- Use the entries per page selector at the bottom left to change how many companies are displayed per page (1 to 10).
- In the grid, click the Edit icon next to your login company to open the edit form.
- Modify the necessary details.
- Click Save to update the company details successfully.
- Click Cancel to return to the company management grid view without saving.
- Click on a Company Name to open the View Company Details page.



- On the View Company Details page, you can see details of all the companies.
- For your login company, you have options to:
- Edit company details by clicking Edit details.
- Click Cancel to return to the company management view.



- Click Renew to renew company registration dates.
- Enter valid registration dates for renewal.
- Click Submit to send the renewal request to GIC Admin.
- A success message will appear.  
**“Company Renewal Request sent to GIC Admin for approval.”**

- If you want to cancel the renewal process, click Cancel to return to the company details page.
- GIC Admin will review and approve the renewal request from the Actionable section.

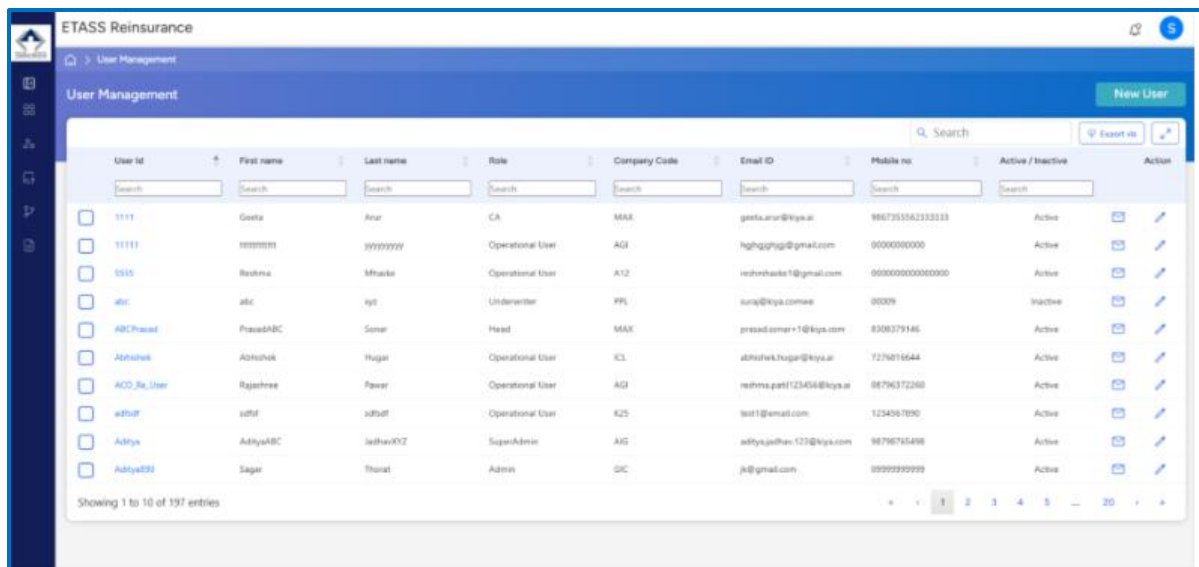
## 5.2. User Management

**Purpose: User Management** allows company users to manage all users within their specific company.

**Note:** Before **Company Admin** can create Users, they must first **create Offices** under the **Office Master** menu.

### Steps: Create company users

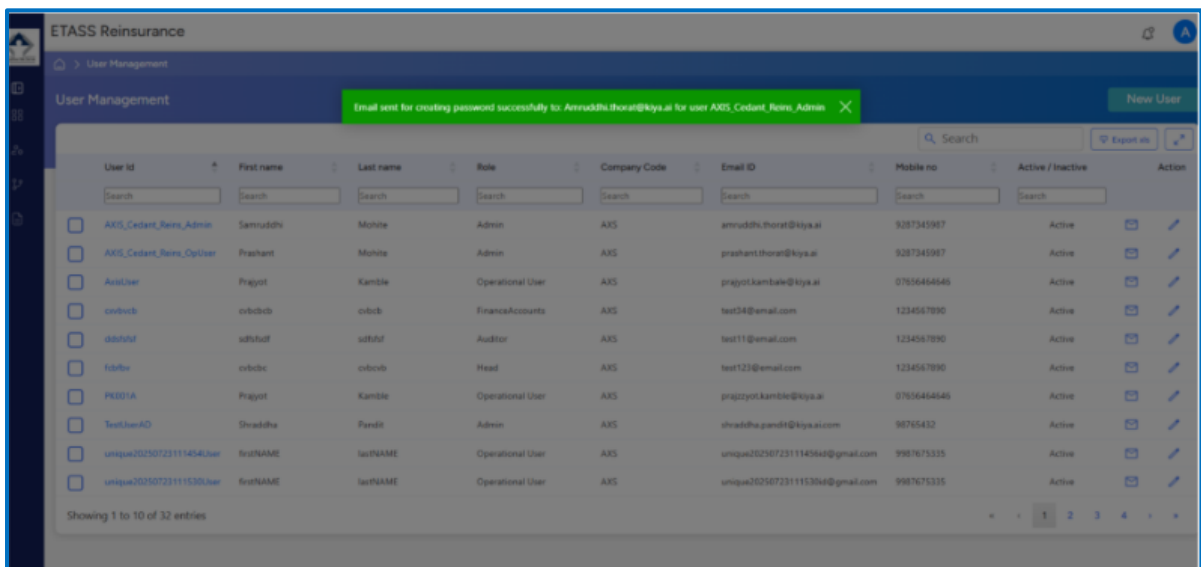
- Click Menu.
- Select Admin.
- Choose User Management.



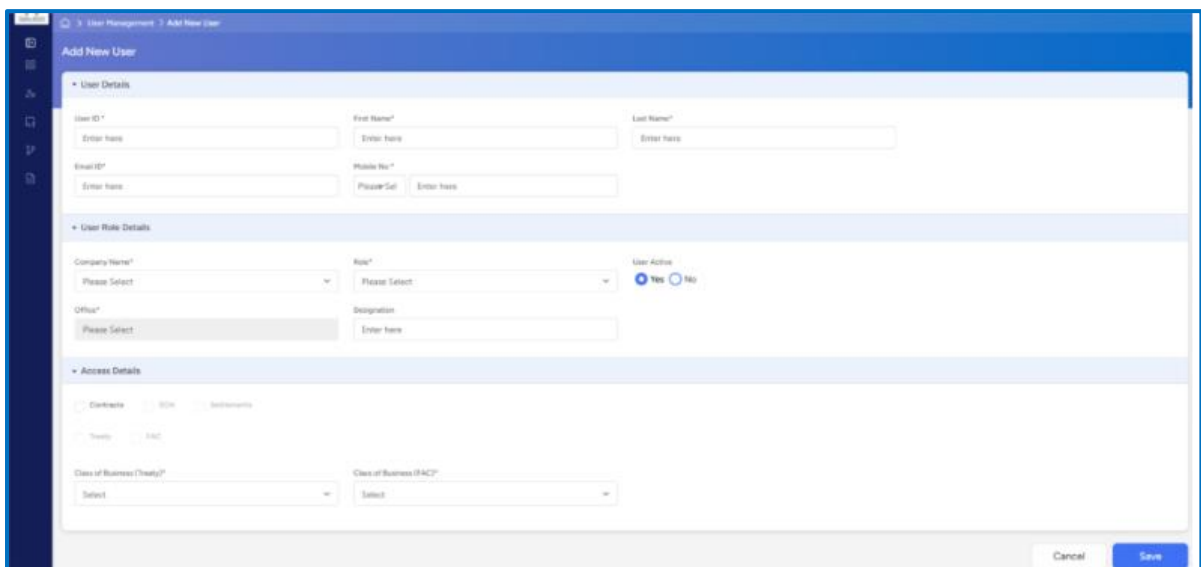
User ID	First name	Last name	Role	Company Code	Email ID	Mobile no	Active / Inactive	Action
1111	Gosta	Anur	CA	MAX	gostanur@kya.ae	9867355562333333	Active	[Mail] [Edit]
11111	mmmmmm	yyyyyyyy	Operational User	AGI	hgghghgh@gmail.com	0000000000	Active	[Mail] [Edit]
5555	Reema	Mhaska	Operational User	A12	reemahaka1@gmail.com	0000000000000000	Active	[Mail] [Edit]
abc	abc	xyz	Underwriter	PPL	lung@kya.com.ae	0000	Inactive	[Mail] [Edit]
ABCPrasad	PrasadABC	Senior	Head	MAX	prasad.senior1@kya.com	8300379146	Active	[Mail] [Edit]
Abhishek	Abhishek	Hugar	Operational User	ICL	abhishek.hugar@kya.ae	7276816644	Active	[Mail] [Edit]
ACC_Ra_User	Rajashree	Pawar	Operational User	AGI	rajashree.pawar123456@kya.ae	98796372260	Active	[Mail] [Edit]
aditf	aditf	aditf	Operational User	K25	aditf@gmail.com	1234567890	Active	[Mail] [Edit]
Aditya	AdityaABC	JadhavXYZ	SuperAdmin	AIG	adityajadhav.123@kya.com	98796765438	Active	[Mail] [Edit]
Aditya89	Sage	Thoral	Admin	GIC	jd@gmail.com	0000000000	Active	[Mail] [Edit]

- When the User Management page opens, all users are displayed in a Grid View with the following functionalities:
- **View All Users**
- **Global Search:** Search users using keywords.
- **Custom Filter:** Apply filters to narrow down user lists.
- **Add New User** (via **New User** button)
- **Edit Existing User** (via **Edit icon**)
- **Deactivate Users**
- **Export User Data** to Excel
- **Send Password Setup Link** (via **Mail icon**)
- **Bottom Right:** Number of pages available.

- **Bottom Left:** Entry range per page (e.g., "1 to 10 of 50 entries").
- Click **Minimize/Maximize icon** to resize the grid within the same window.
- **Export XLS** button: Downloads **all users** in an Excel file.
- **Select checkboxes** next to specific users and click the **Download icon** to export **only selected users**.
- Click on the **Mail icon** beside the user.
- A **password creation link** is sent to the user's registered email.
- A **Success Pop-up Message** appears.
- Click the **Cross (X)** on the pop-up to return to Grid View.



- Click the **New User** button.
- Fill out the form with user details.



- Click Save to add the user.
- Click Cancel to return to the User Management Grid View without saving.

- Click the Edit icon in the grid next to the user.
- Save: Updates user details.
- Cancel: Returns to the User Management Grid View.
- Click on the User Id in the grid.
- The View User Details page opens.

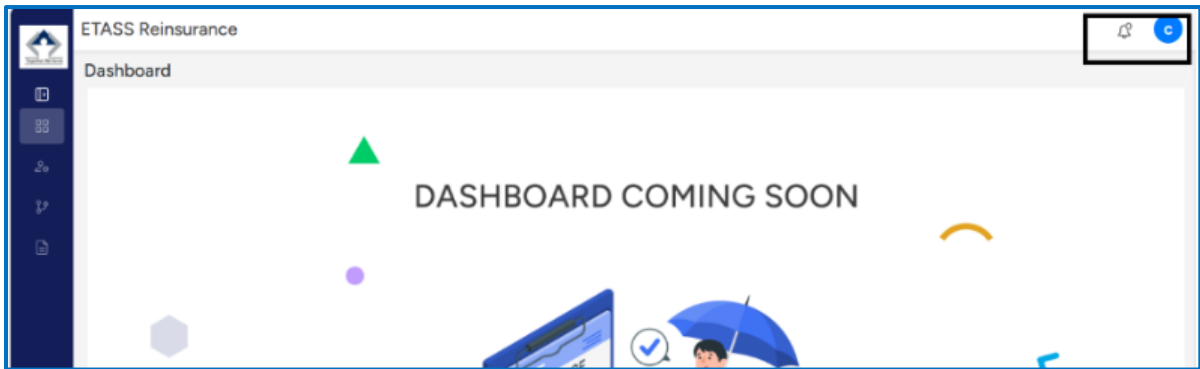
- Click Edit Details to edit the user's information.
- Click Back to return to the User Management Grid View.

### 5.3. Renewal Request

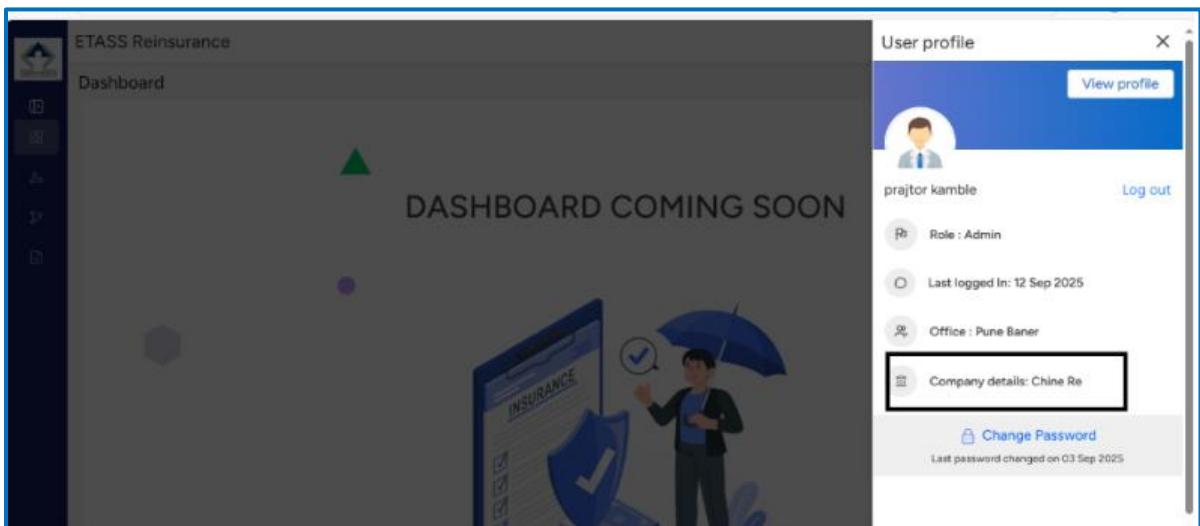
**Purpose:** A Company Admin can submit a renewal request for their company's registration.

**Steps: Submitting a Renewal Request**

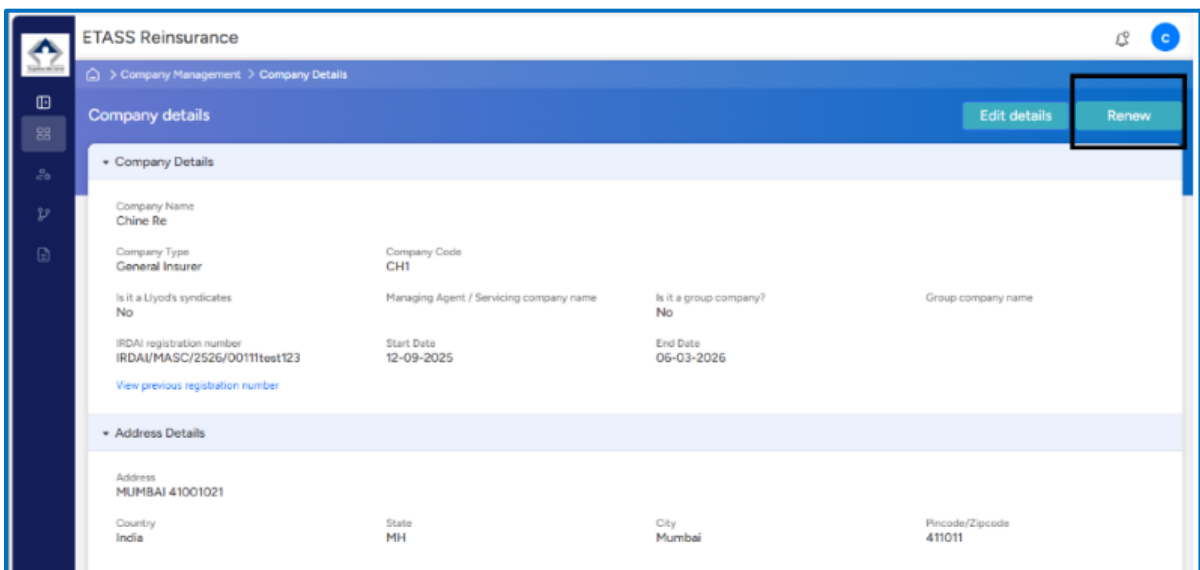
- Company Admin logs into the ETASS Reinsurance system.
- Click on the user icon at the top right corner.



- Select Company Details.

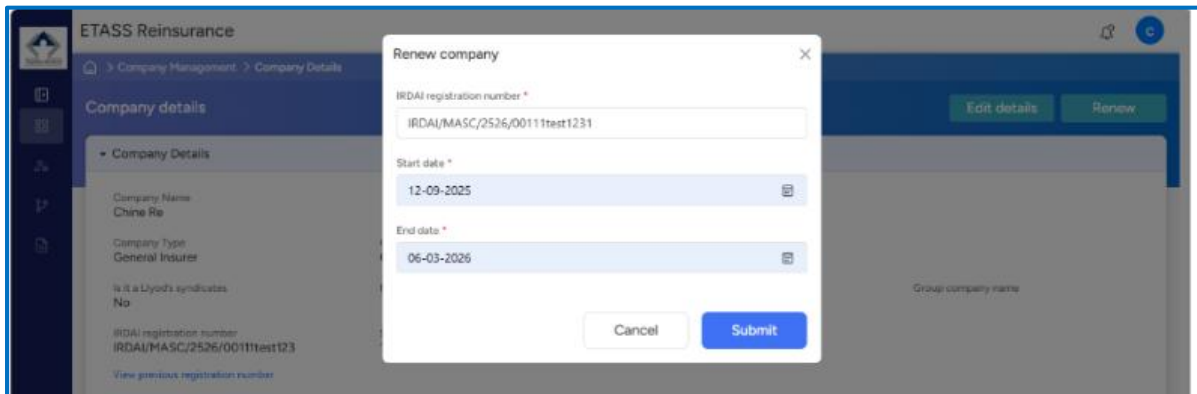


- On the Company Details page, click the Renew button located at the top-right.



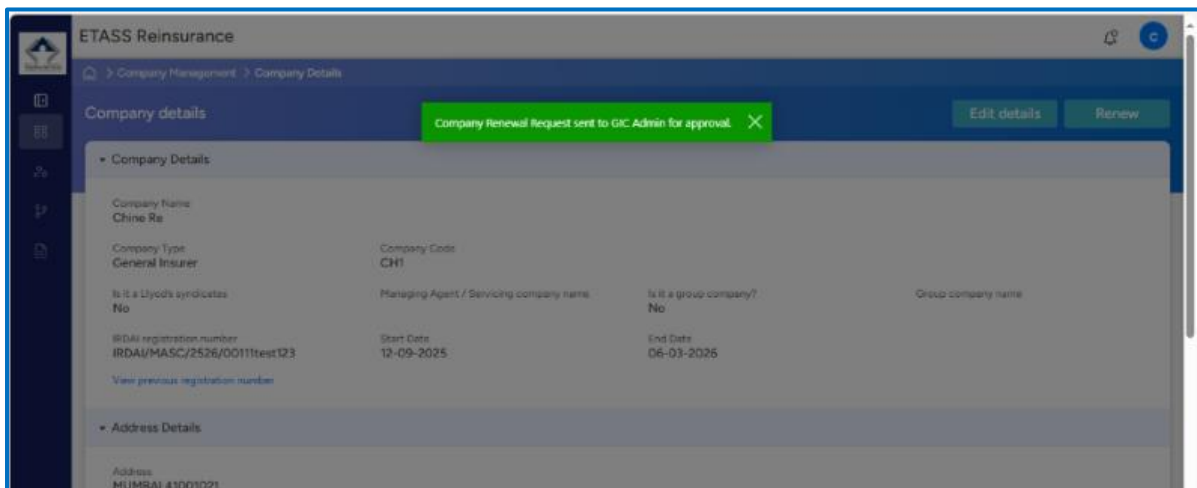
- A Renew Company popup will appear.

- Enter the updated IRDAI registration number.
- Enter the new Start Date (format: dd-mm-yyyy).
- Enter the new End Date (format: dd-mm-yyyy).

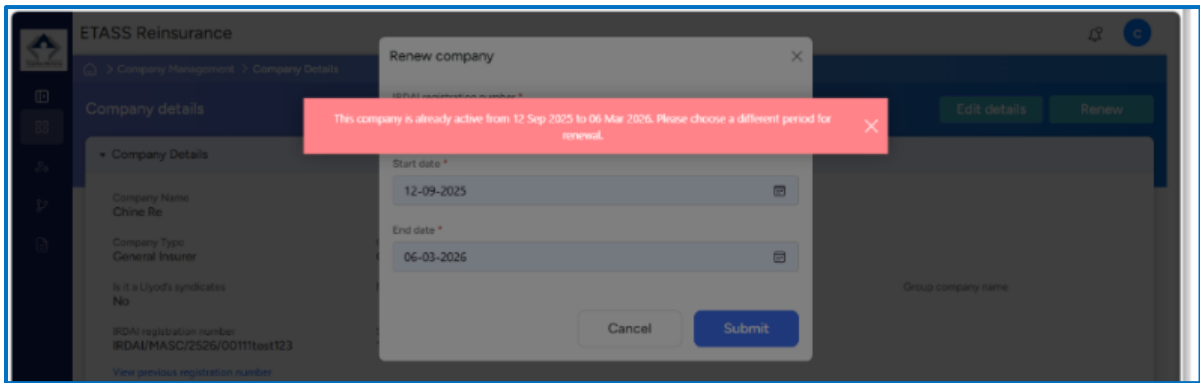


- After entering valid dates, click Submit.
- A green success message will appear:

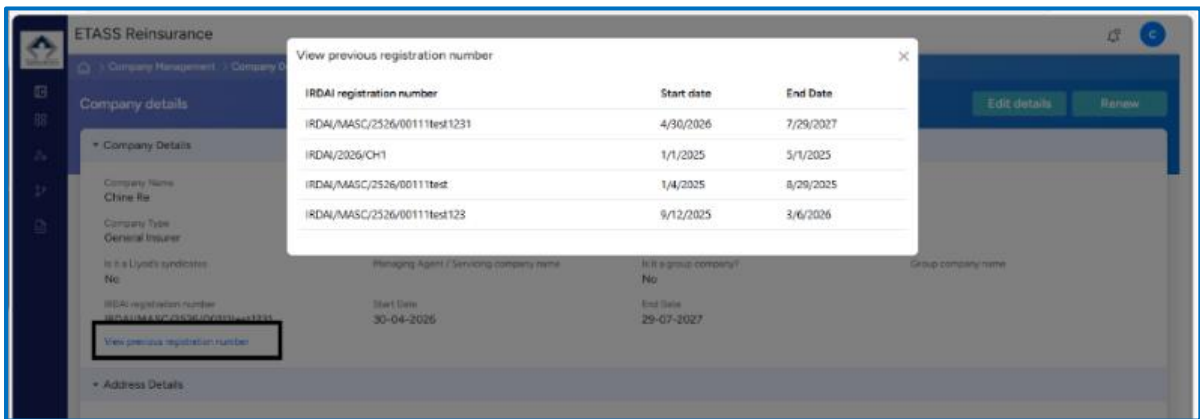
**“Company Renewal Request sent to GIC Admin for approval.”**



- The system checks for overlapping registration periods.
- If the new dates overlap with an existing active registration, an error message will appear: **“The company is already active from [Start date] to [End date], please choose a different period for renewal.”**
- In this case, adjust the renewal dates to a non-overlapping period and resubmit.



- Click the link “View previous registration number” to see the history of prior registrations, including past IRDAI numbers and their validity periods.

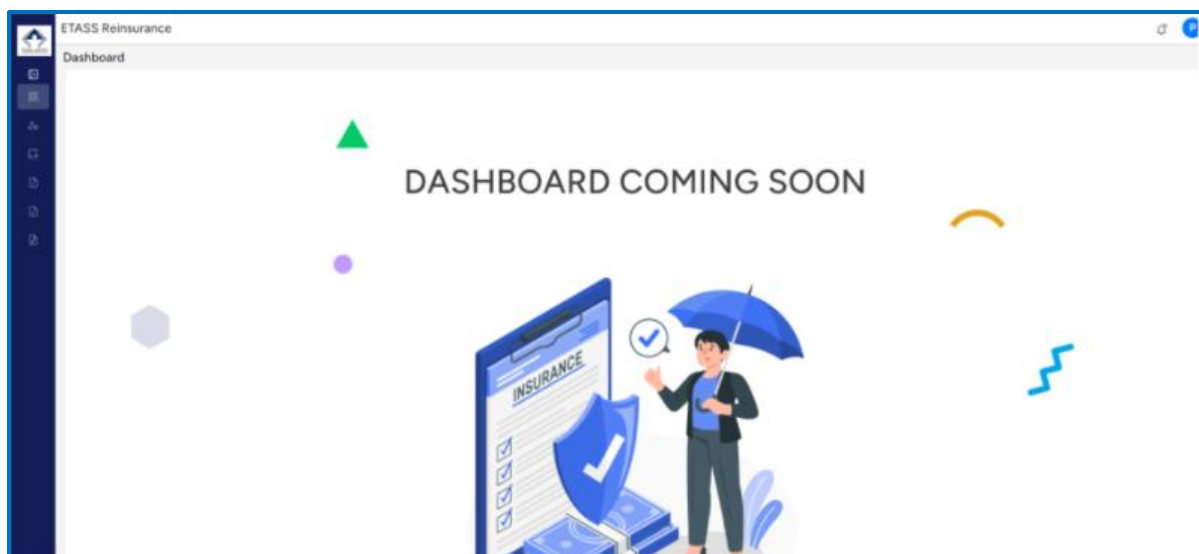


## 6. Operational User Roles and Responsibilities

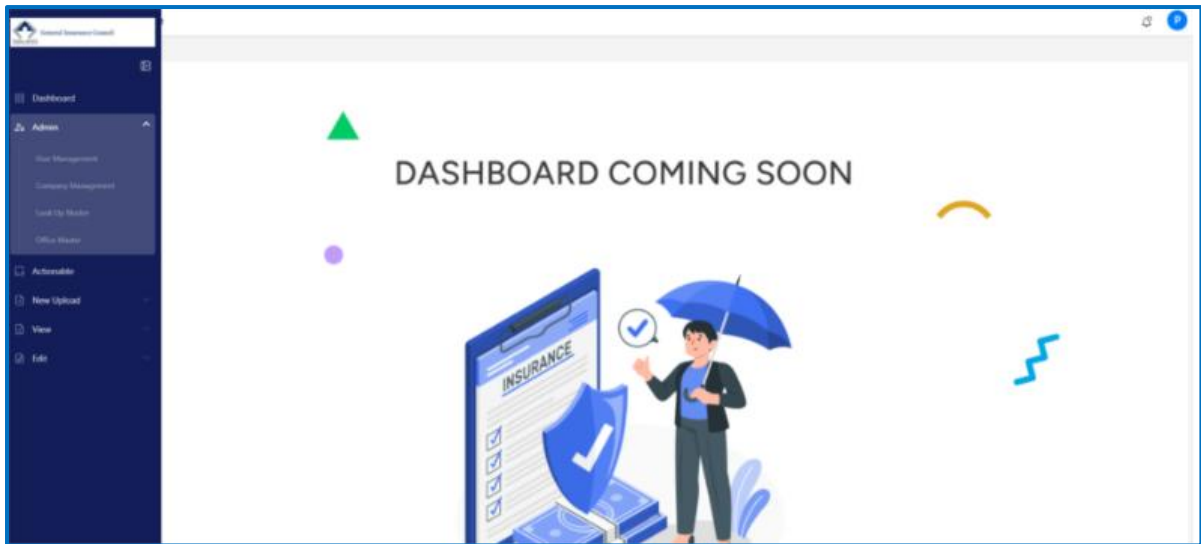
**Operational Users**, such as **Cedants**, **Brokers**, and similar roles, have **view-only access** within the system. They can **view data** in key modules such as the **Lookup Master**, **Office Master**, **User Management**, and **Company Management**, but they **cannot add, edit, or delete** any entries.



- Operational Users (e.g., Cedants, Brokers) log in using their User ID and password.
- Upon successful login, the user is redirected to the Dashboard.



- The Dashboard appears with the main menu located on the left side of the screen.
- From the menu, click on Admin to view available modules.



## 6.1. User Management

**Purpose:** User Management allows company users to **view** user details.

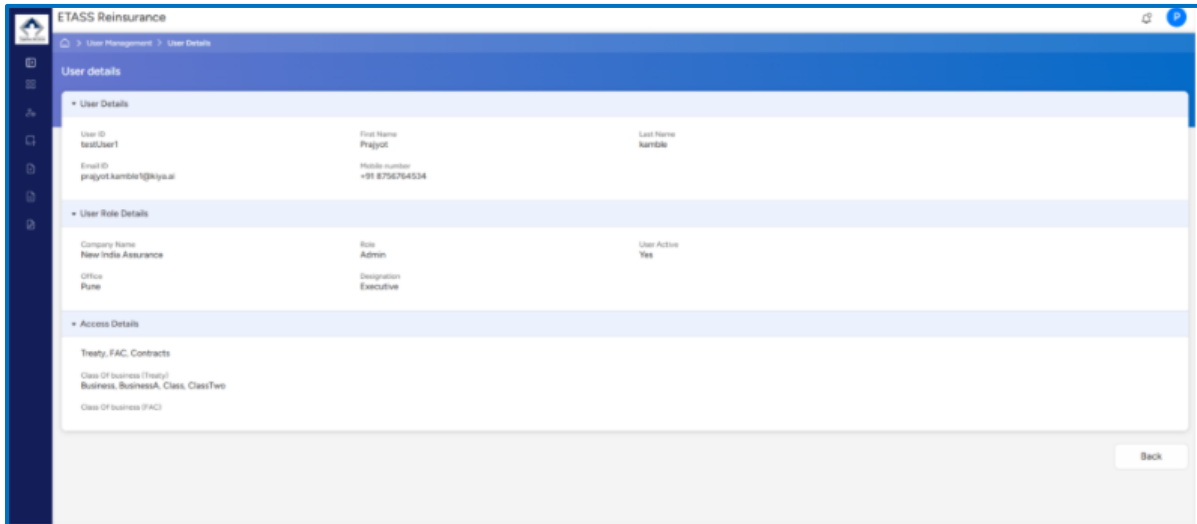
**Steps:** User Management

- Click on Menu.
- Select Admin.
- Click on User Management.

User ID	First name	Last name	Role	Company Code	Email ID	Mobile no	Active / Inactive
#	#	#	SuperAdmin	004	#@#m.com	000000	Active
Pratik	Pratik	S	HR	004	pratik.s@gmail.com	9888888888	Active
PratikB	Pratik	B	QCAdmin	004	pratik.b@gmail.com	2222222222	Active
PratikBanshakar	Pratik	Banshakar	Operational User	004	pratik.banshakar@knyan	9876543210	Active
sandeep	sandeep	pratik	Operational User	004	sandeep.t.pratik@knyan	1234567890	Active
Sangita123	Sangita	Prati	Admin	004	sangita@knyan	9876543	Active
Sangita123	Sangita	Prati	Admin	004	sangita@knyan	9876543210	Active
pratikB	Pratik	Banshakar	Admin	004	pratik.banshakar@knyan	876543210	Active

- The system displays a grid view listing all users associated with the logged-in user's company.
- Users can apply a custom filter to refine the displayed records.
- To search for a specific user, use the global search option at the top of the page.

- Click on the Export button to download all user records in Excel format.



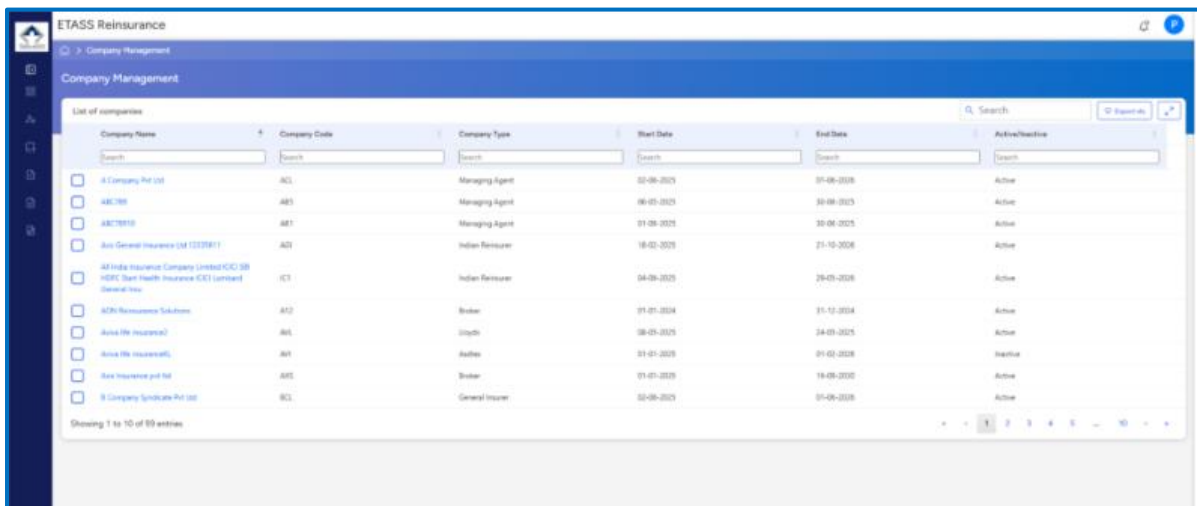
- Click on a User ID link in the grid to open the View User Details page.
- On this page, users can only view the user information – editing is not allowed.
- Click the Back button to return to the User Management grid view.

## 6.2. Company Management

**Purpose:** Company Management allows company users to view company details.

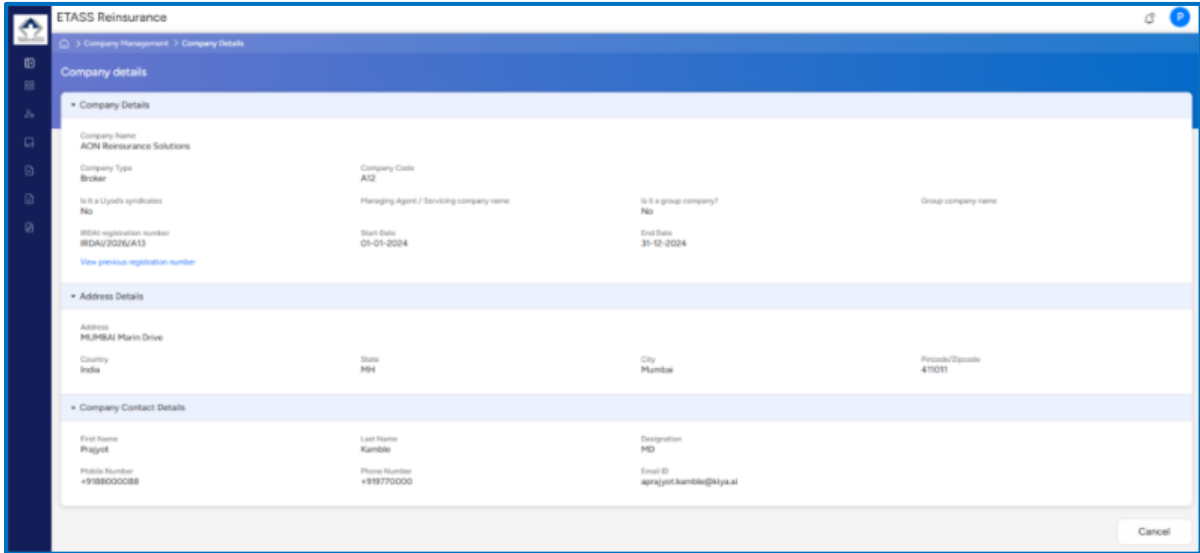
### Steps: Company Management

- Click on Menu.
- Select Admin.
- Click on Company Management.

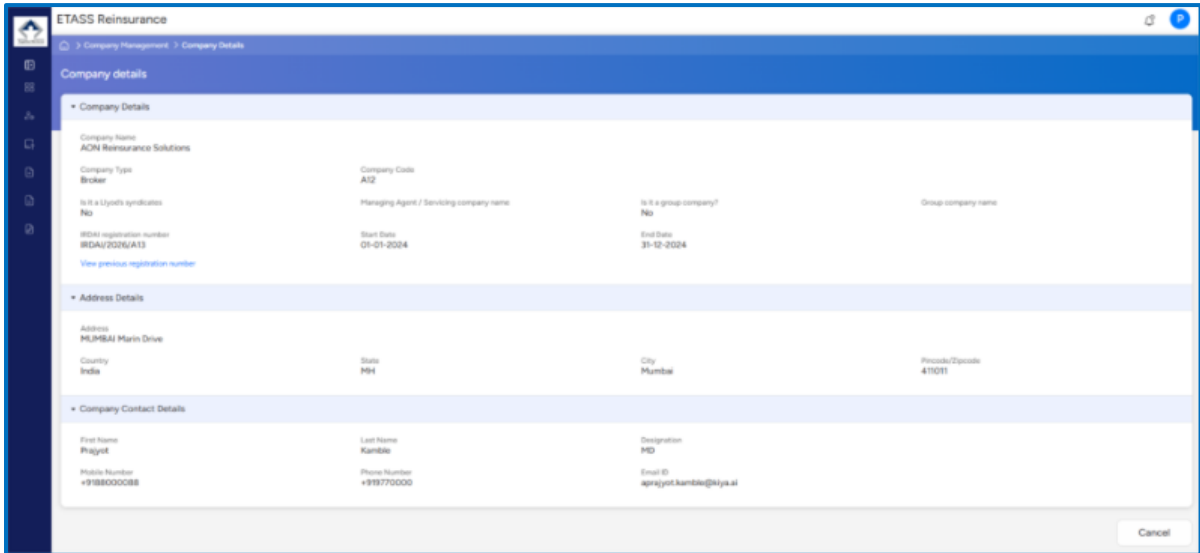


- Users can only view companies' details.
- Users cannot add new companies or edit companies' information.
- Use the search option to find specific companies in the grid.

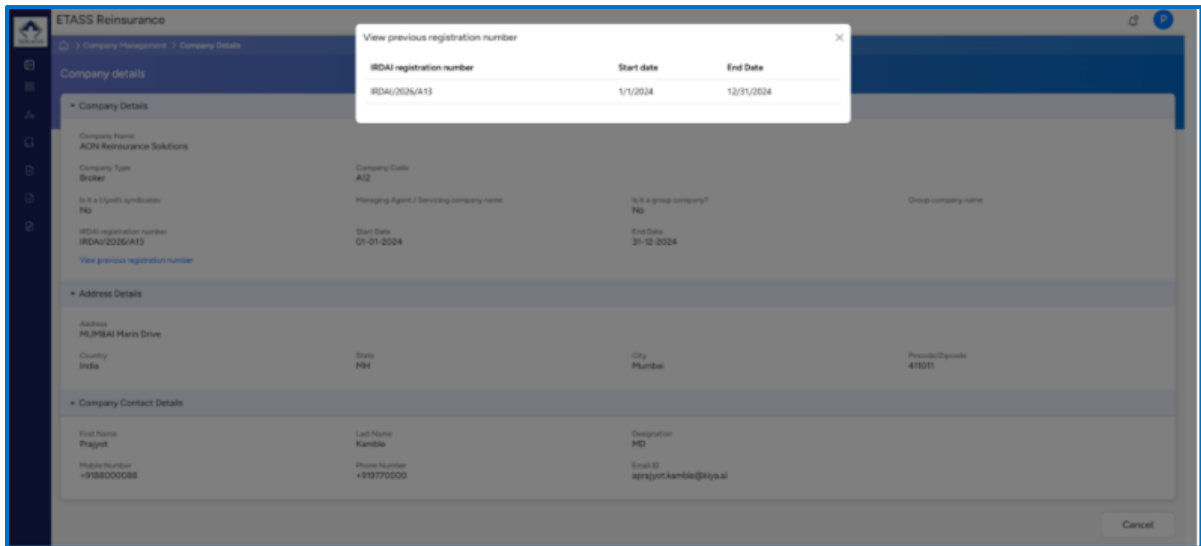
- Click the Export XLS icon to download all company details in Excel format.



- Click on the Company Name link in the grid to open the View Company Details page.
- On this page, users can only view the company record (no edit access).
- Click the Cancel button to return to the Company Management grid view.



- Click on the Company Name link in the grid to open the View Company Details page.
- On this page, users can only view the company record (no edit access).
- Click the Cancel button to return to the Company Management grid view.



- On the View Company Details page, click the link “View Previous Registration Number” to see historical IRDAI registration numbers, including start and end dates.

---

*End of Document*