eDocs

Introducing **eDocs**...a how to guide

How to Access **eDocs**

Getting set up with login details

Access to the eDocs portal is simple; all you need to do is log onto TheHub through Google Chrome and navigate to the eDocs section of the site. If you are not signed up to TheHub your office's NIG Broker Administrator will be able to add you as a user. Please refer to the FAQ's for advice on how to do this.

Once you have been added to TheHub it will take 24 hours for the eDocs portal to be updated with your user details.

If you are unable to access eDocs after 24 hours then please check your security protocols. If your security protocols are preventing you from accessing the eDocs portal then you will have to contact and advise your IT department to allow your organisation's firewall to connect to 'port 9443' as well as unblocking 'nig.communisis.com'.

Software requirements:

Operating System
Windows Vista Enterprise (32-bit)
Windows 7 Professional, Enterprise or Ultimate (32 or 64 bit) Windows 8 Professional or Enterprise (32 or 64 bit)
Windows 8.1 Standard, Professional or Enterprise (32 or 64 bit)

Web Browsers
IE 9, 10 or 11
Firefox (Version 24 and higher and 32-bit version only)
Google Chrome

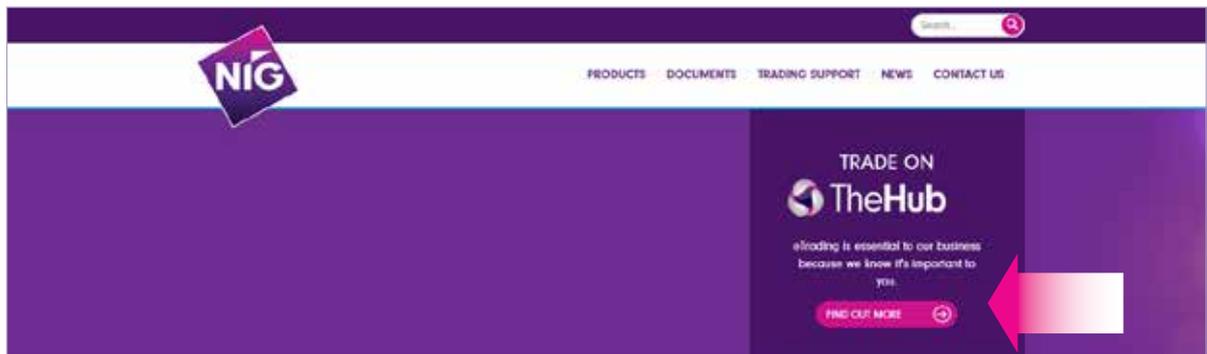**Java Runtime Environment**
JRE 7 and above

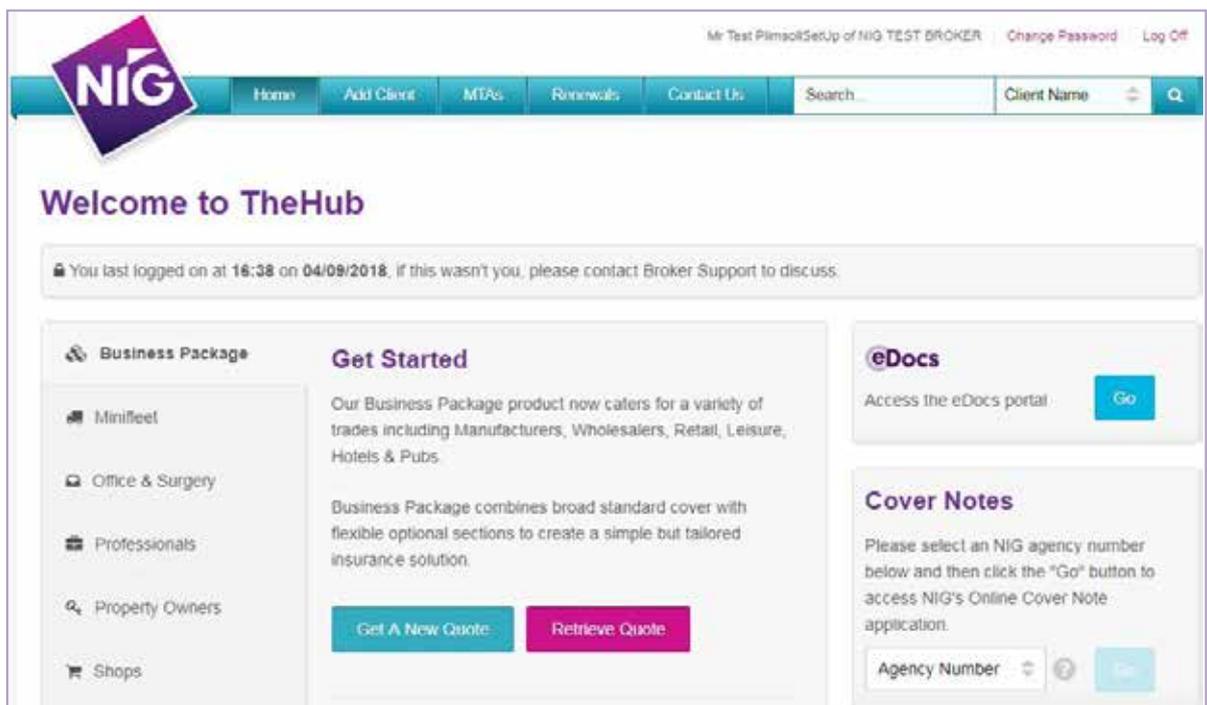**Email Applications**
IBM Notes 9.0
Lotus Notes 8.5.2 or 8.5.3

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How to use eDocs

1 Visit **www.nig.com** through Google Chrome and click on '**TheHub**' module that is displayed on the homepage:

2 Once you're logged into TheHub, select '**Go**' to access the eDocs portal:

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3 You will then be re-directed to the **eDocs portal** – if you are unable to access the portal please email eDocs support (**Edocs.support@directlinegroup.co.uk**). Please ensure that 24 hours have elapsed since access was granted.
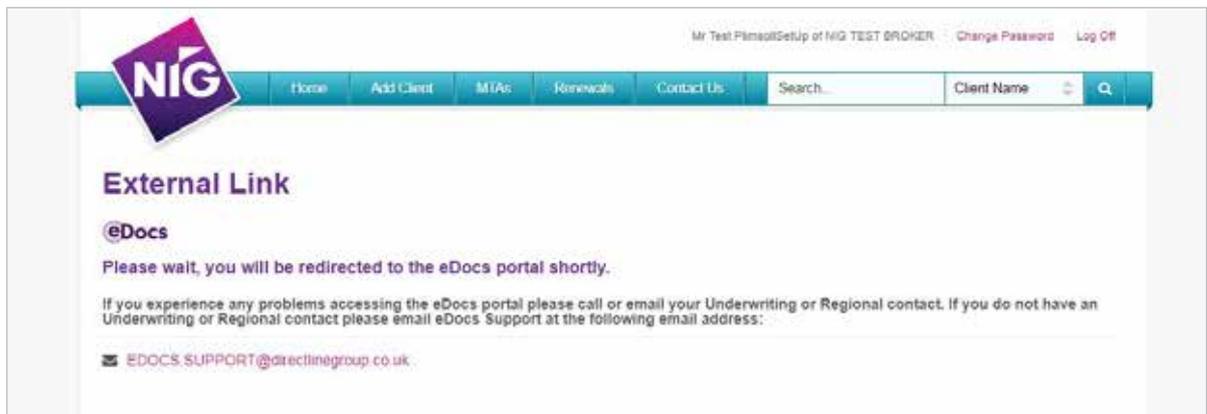
4 On logging into the portal, you will **automatically be presented** with your client's documents. Documents will be displayed that have been uploaded to the portal over **the last 12 weeks**. You can scroll down to view all documents:

a Date range of the documents already loaded

b Click on the header to change the order of the documents

c Documents automatically loaded in date order

**d** Inception/Change date shown on document list

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5 To view your documents **double click** on the **relevant row**, this should open up in PDF format for you to 'Save' or 'Print'.

If this does not open up in PDF you will need to **right click on the document**, select **Download** and select **As Original**, which will open up the PDF document:
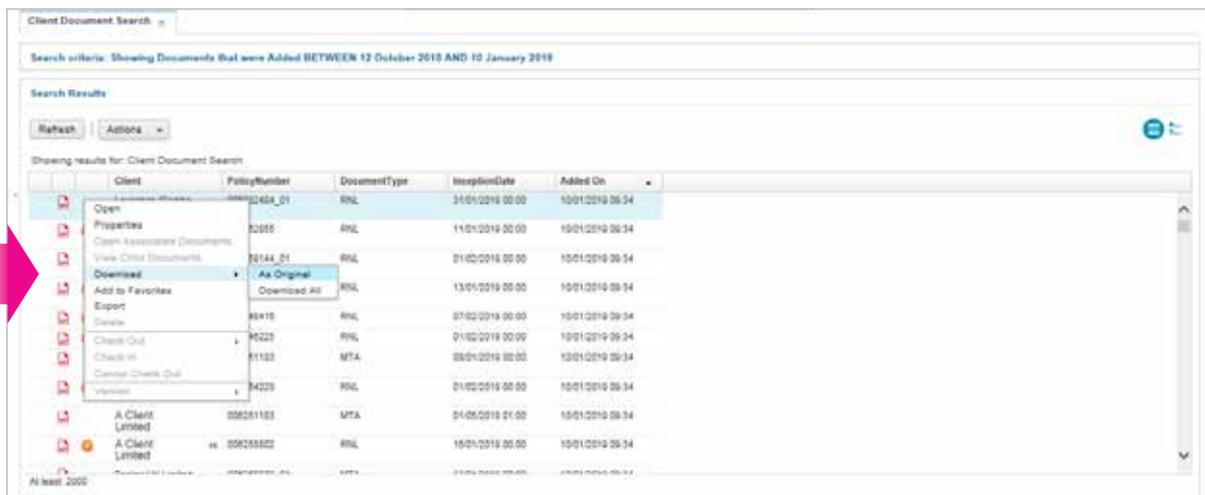
6a A supporting documents icon is present. This shows that additional documents need to accompany the policy documents.
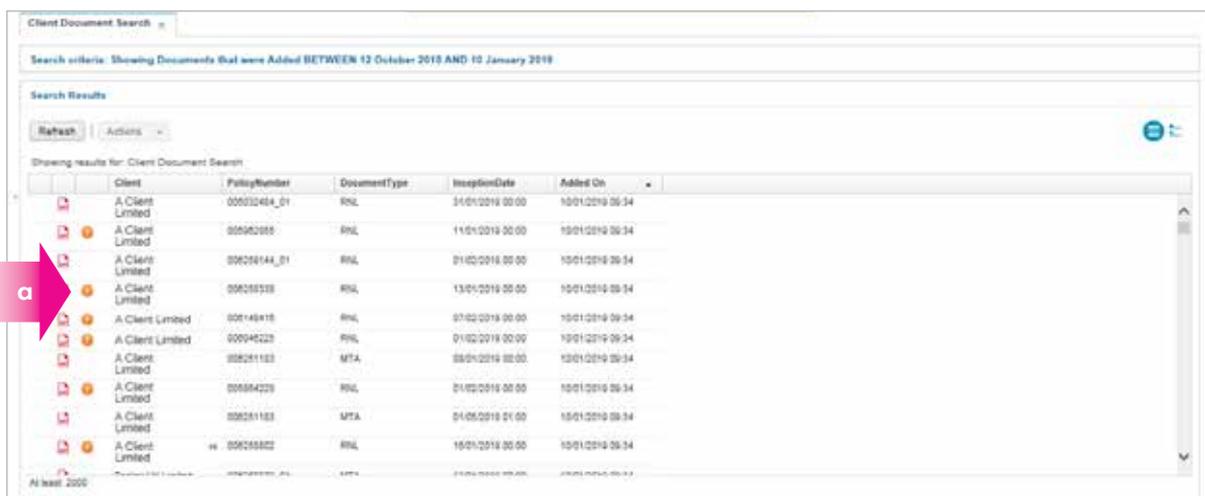
a Supporting documents icon present

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6b To view the Supporting Documents right click on the PDF document and select '**Open Associated Documents**':

6c A list of the **Supporting Documents** will appear. To view documents **double click** on the **relevant row** and this should open up in PDF format for you to 'Save' or 'Print'.

If this does not open up in PDF you will need to **right click on the document**, select **Download** and select **As Original**, which will open up the PDF document.
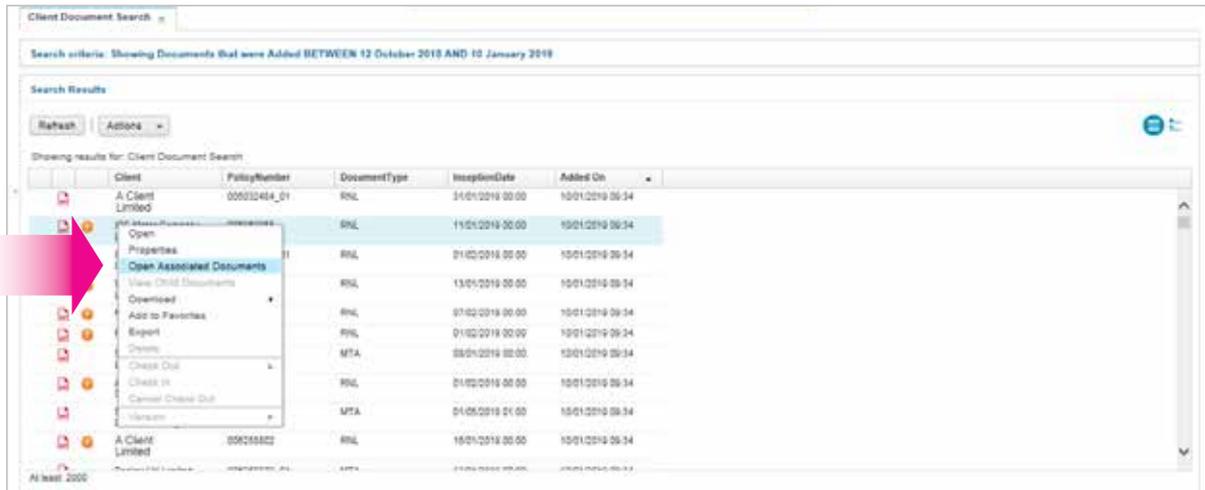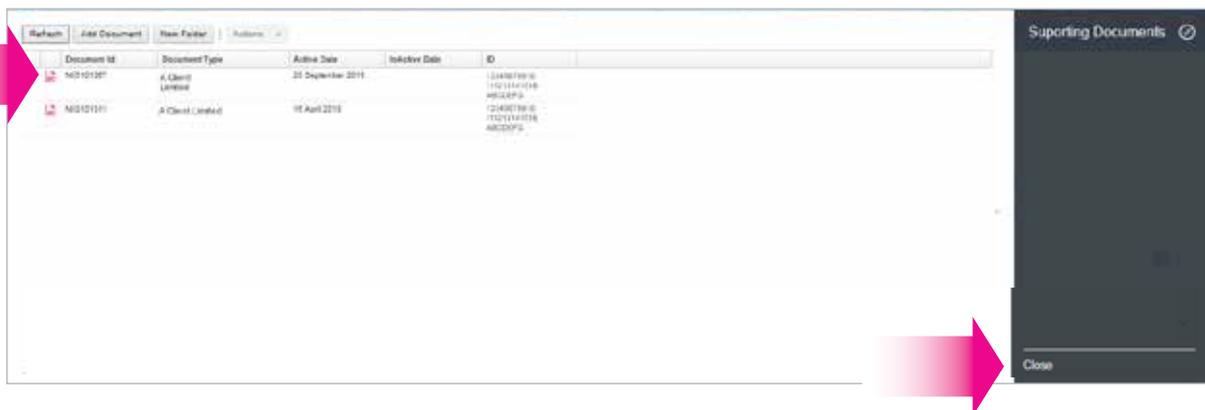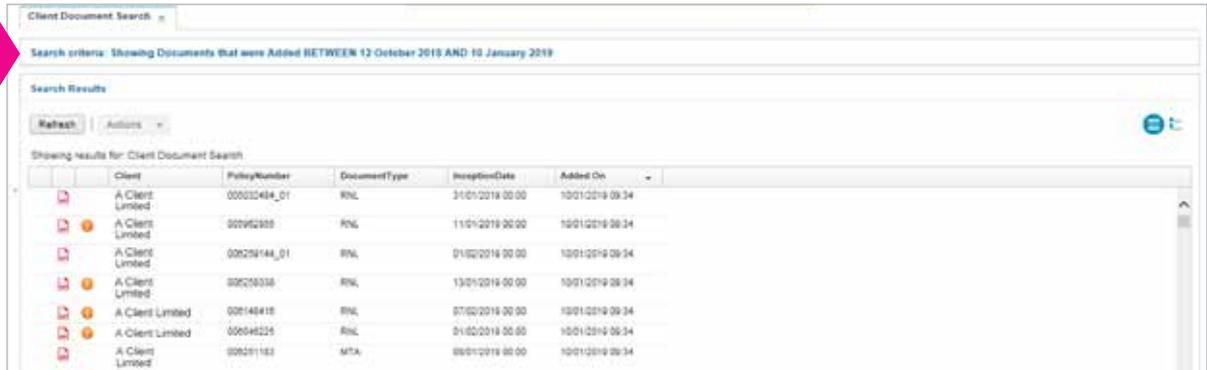

6d Select **Close** when finished.

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7a You can **search** for documents by clients **name**, **postcode** of the clients correspondence address or the **policy number**. Click on **Search Criteria**:

7b Add the relevant details to the search criteria. This can be part of the name, postcode, or policy number. Initially the search will only look at the default added on dates, unless these dates are changed. Select **Search**:
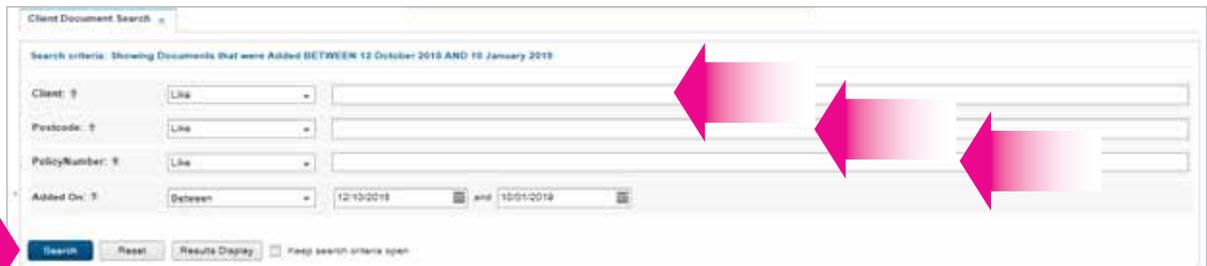
7c To revert back to the default search – select **Reset** and **Search**
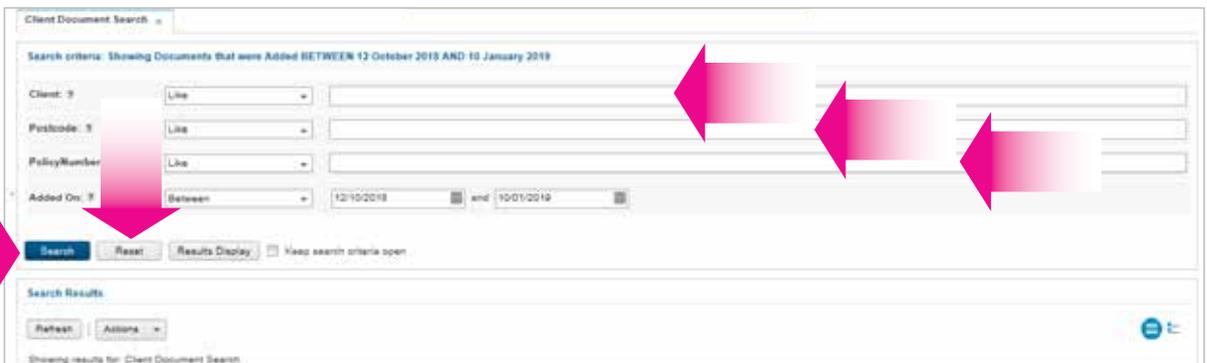
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Multiple Login ID's

If you need to access documents on the portal under different Agency Numbers, you will need to set up different login IDs, which will relate to access under each Agency. To access multiple Logins at the same PC in one day, please follow the instructions below:

How to use eDocs

1 Exit out of the eDocs portal by clicking on the '**X**':
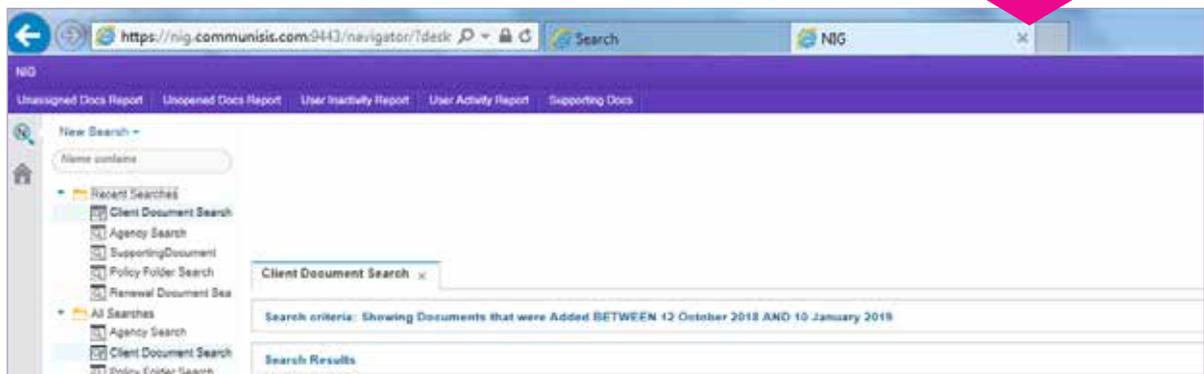
2 **Log Off** the Edocs System:
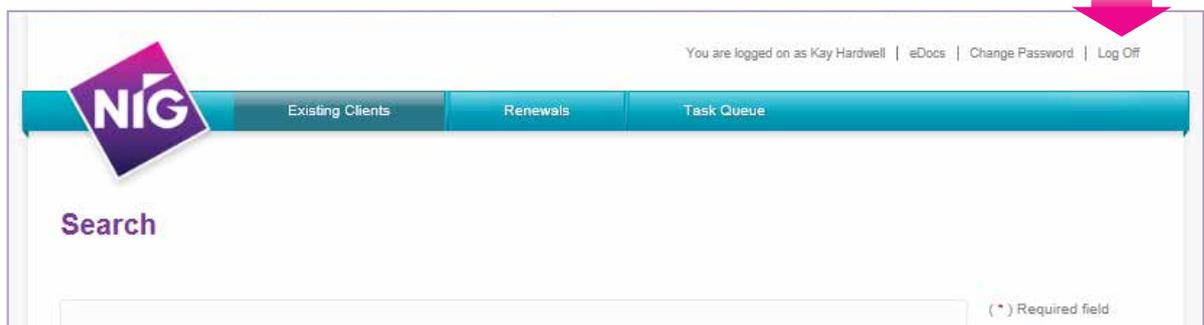
3 Shut down the **Browser** (Google Chrome).

4 **Open** up a new **Browser** (Google Chrome).

5 **Log** into eDocs with the **new** Login ID.

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eDocs FAQ's

NOT CURRENTLY SIGNED UP TO THE HUB?

What should I do if I'm not signed up to TheHub?

Contact your office's Broker Administrator who will be able to set you up with a login to TheHub. Once you have been added to TheHub, it will take 24 hours for the eDocs portal to be updated with your user details. **User details** must **be set up against the correct Broker Account number**.

What is the role of a Broker Administrator?

The Broker Administrator's role is to manage who from your business can access TheHub and what functions they have access to. This will typically include creating and authorising new user accounts, or removing a user account from the system, which is essential when people leave your company. It also means that anyone who registers for an account can be set up in-house.

What should I do if there isn't a Broker Administrator set up in my office?

Each office/branch needs to nominate at least one Broker Administrator and we advise that there should be more than one per office/branch in order to cover holidays and/or absences.

In order to be set up as your office's nominated Broker Administrator you will need to:

- Visit **www.nig.com/trading support**
- under 'The Hub' select **Broker Admin Guide**
- download and complete the **Broker Administrator Nomination Form**
- email the completed form to **brokersupport@nig-uk.com**

ACCESSING THE HUB/eDocs PORTAL

How do I login to TheHub?

Visit **www.nig.com** through **Google Chrome** and click 'login' on **'TheHub'** module that is displayed on the homepage.

What should I do if I'm already signed up to TheHub?

Existing users of TheHub will automatically be signed up to eDocs. The **eDocs** access module is visible on the homepage when you login to **TheHub**.

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eDocs FAQ's

When I click 'Go' to access the eDocs portal from TheHub home page, I am not re-directed to the eDocs portal?

If this is affecting all users in your office, this may be due to the security protocols your organisation has in place. **Please contact and advise your IT department to allow your organisation's firewall to connect to 'port 9443' as well as unblocking 'nig.communisis.com'**.

If this is just affecting you then please email the eDocs support mailbox **Edocs.support@directlinegroup.co.uk** confirming your LogIn ID, details of any error message, and if possible a screen shot showing any error message.

ONCE YOU ARE IN THE eDocs PORTAL

What do I do if I see a <TIMEOUT MESSAGE> when I'm logged in?

The single sign on from TheHub is only valid for 120 minutes - please login to TheHub again.

How will we be notified that documents are available in the eDocs portal?

There is a daily notification email sent to the Broker Administrators confirming which policy documents have been loaded in the eDocs portal that day. The daily notification that Brokers receive will come from the following email address: **ecm.monitoring@communisis.com**. If necessary this address should be added to your safe senders list, unblocked, or marked as not being spam.

Can you notify the agents direct that documents are available?

No, this will only be sent to the Broker Administrators – however the administrators can set up an auto forward rule so that any emails received from communisis.com are automatically sent on to their trading staff. Instructions on how to do this are in the attached link:

https://support.office.com/en-gb/Search/results?query=create+an+auto+forward+email+for+some+emails

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eDocs FAQ's

When will my documents appear on the eDocs portal?

All documents will be available by 3.30pm at the very latest, on the working day after finalising the business. The document upload process starts in the morning, with most documents available by midday.

Which documents will appear on the eDocs portal?

Only policy documents generated through transactions from 6 December 2016 onwards will be displayed within the eDocs portal. However, regionally-traded client documents such as Agency Account Statements, Claims, and Credit Letters will not be accessible via the eDocs portal and will continue to be posted to our brokers.

Which documents will not appear on the eDocs portal?

The portal will not upload all documents. Documents for Terrorism, EPO, Cyber and eTrade will be issued to you in the usual way.

Which supporting policy documents will be included on eDocs?

All supporting policy documents on the eDocs portal will be for policies which are Insurance Act compliant. This means they are for policies, either new business or renewal, which have been incepted on or after 12 August 2016. Brokers who require supporting policy documents for policies incepted or renewed prior to the 12 August 2016 will have to download them from the document library on www.nig.com. An icon will appear next to the PDF document if supporting documents are included.

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eDocs FAQ's

How do I download my customer's documents?

Please refer to diagrams 5 and 6.

Why can't I download documents?

Internet Explorer 11 does not have the correct technical requirements to allow document download. We recommend that all users access eDocs on Google Chrome.

How do I print my customer's documents?

On the PDF viewer application (e.g. Adobe Reader) select single sided printing for; Broker header sheets, Employers Liability Certificates, Schedules and standard Motor Certificates. For Motor Certificates with EU cover and Green Cards, please use double sided (Duplex) printing to ensure the EU cover is printed on the back.

Am I able to download all of my documents in bulk?

No, this is not available.

eDocs Contacts

Who should I contact for support?

Your IT Department – To ensure your systems have the correct access capability.

Broker Admistration – The Broker Administrator's role is to manage who from your business can access TheHub and what functions they have access to. This will typically include creating new user accounts and authorising or declining new user accounts from the system, which is essential when people leave your company. It also means that anyone who registers for an account can be set up in-house.

Broker support hub – Contact for any technical queries with the hub at brokersupport@nig-uk.com.

Edocs.support@directlinegroup.co.uk - If you have a problem with accessing your documents in the portal.

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