

ICWGROUP

Snap[®] 

ADMIN GUIDE

Easily manage your staff's access to Snap[®], reset passwords, update user profiles and create new admin users.



Welcome to the Snap Administrator Guide

As an agency administrator, you can easily manage staff access to Snap and assign different levels of permissions. This guide will show you how to:

- Enroll new users.
- Deactivate users.
- Reset passwords.
- Change user email addresses.
- Update profiles.
- Grant administrator privileges.

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Table of Contents

Welcome to the Snap Administrator Guide	2
Technical Information	4
System Requirements	4
For technical issues	4
Helpful Snap materials.....	5
Find everything fast at the Agency Resource Center (ARC)	5
Training videos.....	5
Help Online in Snap	5
Getting Started	6
ICW Group will create your first Snap administrator!	6
If you need a new Snap administrator added	6
Logging in	6
Administrator’s homepage	7
Manage Agency Users Page.....	8
Administrator abilities	8
Creating Snap users and administrators.....	9
Create a user or administrator	9
To send welcome emails later	10
Managing Snap users and administrators	10
Searching for users	10
To edit user information	10
Deactivating users	11
Resetting passwords.....	11
Agency Name Selection	12
Support information	12
Thank you!	12



Technical Information

System Requirements

Snap is supported in the following system configurations.

- Windows 8 or 10, or Windows 7 Service Pack 1 (64-bit recommended)
- Screen resolution: Minimum 1024 x 768 pixels (1280 x 1024 pixels recommended)
- Browser: Latest versions of Google Chrome (**preferred**), Internet Explorer 11.0+, Mozilla Firefox.
- Set browser cache to “Automatically Check for Newer Versions of Stored Pages”

For technical issues

Some firewall configurations may block the Snap site. If you experience Snap connection issues, see “Whitelisting Snap” to learn details about possible symptoms and information on adding Snap as a trusted site.

If you continue to experience technical issues, please don’t hesitate to contact Snap Support at **866.975.SNAP** (866.975.7627) or email snapsupport@icwgroup.com.

Helpful Snap materials

Find everything fast at the Agency Resource Center (ARC)

Find helpful guides, how-to videos and more at icwgroup.com/ARC. Or, go directly to Snap resources with this quick link: icwgroup.com/Snap

- **Snap Producer Guide:** Learn the Snap interface and steps for creating, submitting and binding applications.
- **Snap Administrator Guide:** Set up and maintain your agency's users in Snap.
- **Snap Upload Guide:** Save time and instantly upload applications using Applied Systems Transformation Station, AMS/Vertafore Transact Now, or upload straight from an ACORD PDF form.

Training videos

You'll also find helpful videos at icwgroup.com/Snap. These cover the most common Snap functions and features, and are listed with indexed links for your convenience. Here is a suggested order of viewing:

- Navigation Overview
- Search and filter
- Collaboration Tools
- Prequalify or Check Clearance for a Submission
- Snap's Instant Quote (IQ)
- Uploading Submissions
- Updating Renewals

Help Online in Snap

While in Snap, it's easy to get online help.

1. Simply click the **Help** icon in the top header area.



2. Select **Online Help** to view topics, search for a particular item or view tutorials.

Getting Started

ICW Group will create your first Snap administrator!

When your agency is appointed with ICW Group, your agency provides ICW Group with the names and emails for Snap administrators at your company. ICW Group will take it from there to create your first administrators. Once an administrator is added to Snap, they receive an email and can access the system.

If you need a new Snap administrator added

Snap administrators at your agency have the capability to quickly add more ‘administrators’ for your agency. See the [Creating Snap users and administrators](#) section for directions.

However, if due to staff changes your Snap administrator is no longer available, your agency Principal or Officer can email a request to their ICW Group underwriting team. ICW Group will create the new administrator account and notify your agency once this process is complete.

Be sure to include in this email:

- The new administrator’s first and last name.
- Their email address.
- If they’re already in Snap as a user.
- If they’re being added as another administrator or if they’re replacing someone.
- And, if they *are* replacing someone, who they’re replacing – and if the person they’re replacing should remain as an active Snap user.

Logging in

Once you’re added as an administrator in Snap, you’ll receive an email and can access the system. Simply log into Snap as usual; Snap will know your user level and show you what you need to perform your job.

1. Go to the ICW Group ARC to login. Quick link: icwgroup.com/snap
2. Click on the Snap Login link.



3. You can also login directly to Snap: snap.icwgroup.com.

Administrator's homepage

When you log in to Snap as an administrator, you'll see a tab others won't see on the homepage – the **User** tab. This unique tab allows you to view and manage your agency's users, including their information, permissions and perform user maintenance.



1. Click the **Users** tab, and select **Agency/Brokerage Users** from the flyout menu.

Insured	Submission	Effective	Status	Premium	Next Action	Assigned To
ABC IQ Test		08/01/2019	Draft	\$0		
ABC 3724 Test		07/01/2019	Draft	\$0		
123 non IQ test		07/02/2019	Draft	\$0		
Home for You Electric Inc		06/26/2019	Application Uploaded	\$0		
Mr. Giggles Rent A Clown		06/27/2019	Draft	\$0		
Edwards Electronics		08/08/2019	Application Uploaded	\$0		
lock KY test		10/01/2019	Draft	\$0		
locky agent non iq multi-state timing test		01/23/2019	Submitted	\$0		Christine Locky
locky trucking ok pa sc tn tx va wi	1046879	06/01/2019	Submitted	\$0		Jana Rzemnick
locky submit pending no more		08/30/2019	Submitted	\$0		Jana Rzemnick
LLNH		07/01/2019	Submitted	\$0		Jana Rzemnick

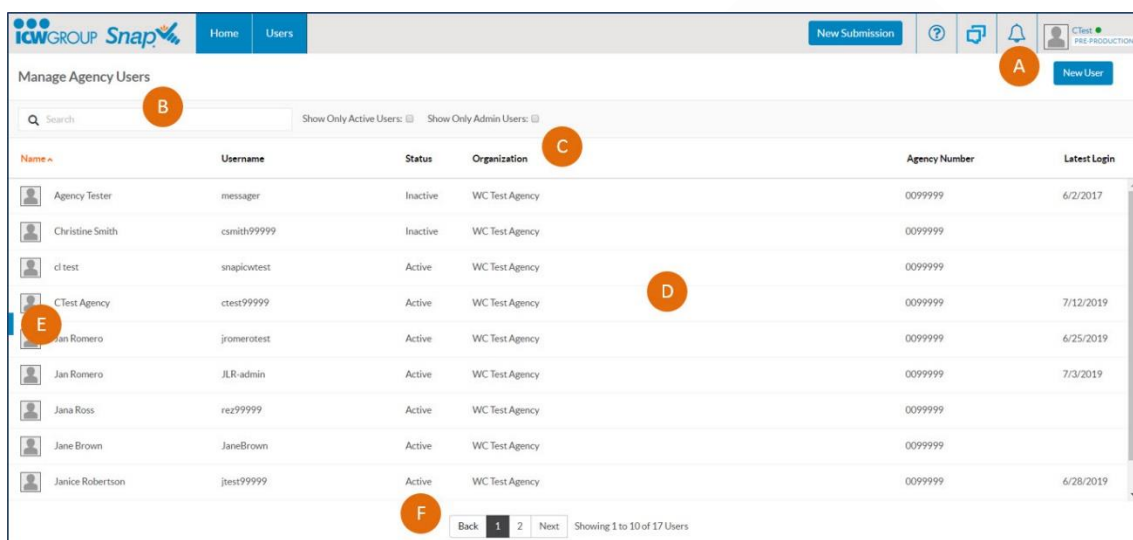
2. Snap's "Manage Agency Users" page will display.

Name	Username	Status	Organization	Agency Number	Latest Login
Agency Tester	messenger	Inactive	WC Test Agency	0099999	6/2/2017
Christine Smith	csmith99999	Inactive	WC Test Agency	0099999	
cl test	snapiwctest	Active	WC Test Agency	0099999	
C Test Agency	ctest99999	Active	WC Test Agency	0099999	7/12/2019
Jan Romero	jromerotest	Active	WC Test Agency	0099999	6/25/2019
Jan Romero	JLR-admin	Active	WC Test Agency	0099999	7/3/2019
Jana Ross	rez99999	Active	WC Test Agency	0099999	
Jane Brown	JaneBrown	Active	WC Test Agency	0099999	
Janice Robertson	jrest99999	Active	WC Test Agency	0099999	6/28/2019

Manage Agency Users Page

The Manage Agency Users page consists of (refer to the following illustration):

- A. **New User button** – Allows you to create new agency and administration users.
- B. **User Search** – Search for existing user (works with check boxes to filter an agency's Snap users).
- C. **Column headers** – Click to sort information in ascending or descending alphanumeric order.
- D. **Workspace** – Displays search results and information.
- E. **Hover indicator (vertical blue bar)** – Visual aid to show where your mouse is hovering.
- F. **Page buttons** – Allows you to page through search results.



Administrator abilities

As a Snap agency administrator, you have the ability to view and manage user details for your agency. From the Users tab you can:

- Create new Snap users.
- Create or change administrators.
- Search for specific users.
- Edit users' roles, responsibilities, contact information and email.
- Deactivate users.

Creating Snap users and administrators

When you create new users, Snap will send two welcome emails to the user as a security feature. The first contains their username. The second will contain a link to create a new password.

Note: If a user doesn't receive the Snap welcome emails, double-check their email is correct in Snap.

Create a user or administrator

- i. In the "Manage Agency Users" page, click the **New User** button.
1. Complete all fields on the **General Information** screen.
 - a. Enter the user's **First** and **Last Name**.
 - b. **User Login Type** – Keep **Direct** as the default. (Single Sign On will be enabled in a future release.)
 - c. **Role** - Select **Producer** or **Agency/Brokerage**.
 - These roles have almost identical authority in Snap. They can both enter applications, bind business and create IQ quotes.
 - The difference - Only users with the **Producer role** can be assigned to a submission as the actual Producer.
 - d. **Enable This User to Administer Other Agency Users** – Check to grant permission. Note, you can grant the permission later if you wish.
 - e. **Organization** – Ensure the listed organization is correct. For agencies with additional office locations, please see [Agency Name Selection](#).
 - f. Select Authorized Products – Ensure Workers' Compensation is checked.
 - g. **Producer Code** – Leave blank.
 - h. **Title** – Enter the user's title.
 - i. **Username** – Specify the username.
 - Usernames are unique. Snap will notify you if the username already exists.
 - Usernames can be changed.
 - Usernames *do not* require special characters or numbers.
 - j. **Email** – Enter your agency's email address for the user. We suggest this email is unique to this user and not a shared, general email address.
 - k. Enter additional available contact information.

1. Check to ensure the agency **Address** is correct.
2. Click **Activate**.
3. Snap displays a pop-up message that says the user has been stored, but does not yet have a password.
 - Select **Yes** to create the user and send both welcome emails.
 - Select **No** to create the user, but send the welcome emails later.

To send welcome emails later

If you choose to send the emails later, it's easy to go back to send the welcome emails.

1. In the "Manage Agency Users" page, select the user.
2. Click the **Actions** button and select **Create Password**.
3. Click **Yes** to proceed.
4. Snap sends the two welcome emails to the selected user.

Managing Snap users and administrators

As your agency's Snap Administrator, you're responsible for managing and updating your agency's users' details.

Searching for users

1. In the "Manage Agency Users" page, enter the following into the "Search" field to find users fast:
 - full or partial name
 - email address
 - Snap username
2. Select **Show Only Active Users** or **Show Only Admin Users**. Search results will display in the workspace.
3. To quickly clear the Search field, click the **X**.

To edit user information

1. From the Snap "Manage Agency Users" page, select the user to edit.

2. Click **Edit**.
3. Enter the changes, including any change to the username or email.
4. Click **Save**.

Note: Email changes can only be made by the Snap Administrator. Users can't edit their own email addresses.

Deactivating users

Because Snap is accessed outside your company, it's very important to immediately deactivate users who leave your agency. You won't want them to continue to have access to your company's book of business!

1. In the "Manage Agency Users" page, select the user to deactivate.
2. Click **Actions**.
3. Select **Deactivate**.
4. Click **Yes** to deactivate the user.
5. Reassign submissions to another active user in your agency so you can continue to receive notifications from ICW Group.

Resetting passwords

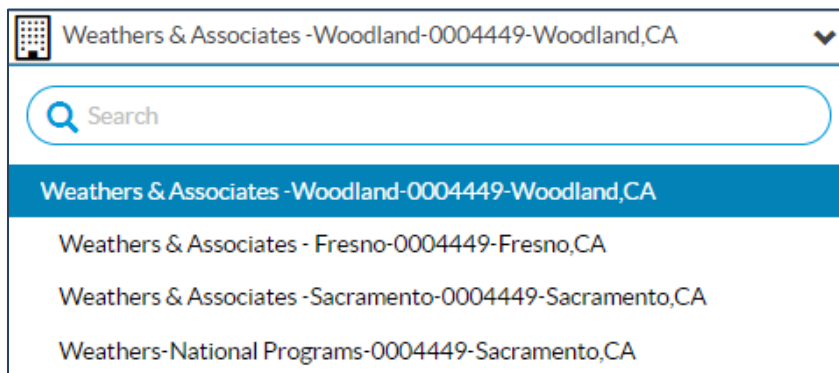
Users will on occasion forget or lock their passwords. It's easy to reset passwords using Snap!

1. In the "Manage Agency Users" page, select the user to help with their password.
2. Click **Actions**.
3. Select **Reset Password**.
4. Click **Yes**. The user will receive an email with a link to reset their password.

Agency Name Selection

Agencies with multiple locations, clusters or complex organizations may have their different divisions created as a hierarchy in Snap. In the Snap “Manage Agency Users” page, these appear in the Organization field as a drop down list.

- Users can be assigned to the appropriate structure level.
- Users assigned to the top level can view all applications for all levels, and assign new applications to any agency level.
- Users assigned to a lower level can only create and view applications for their level.



The screenshot shows a dropdown menu for agency selection. At the top, the current selection is "Weathers & Associates -Woodland-0004449-Woodland,CA" with a downward arrow. Below this is a search bar with a magnifying glass icon and the text "Search". The dropdown list contains the following options:

- Weathers & Associates -Woodland-0004449-Woodland,CA (highlighted in blue)
- Weathers & Associates - Fresno-0004449-Fresno,CA
- Weathers & Associates -Sacramento-0004449-Sacramento,CA
- Weathers-National Programs-0004449-Sacramento,CA

Support information

If you experience any technical issues or have questions about Snap, please don't hesitate to contact Snap Support at **866.975.SNAP** (866.975.7627) or email snapsupport@icwgroup.com.

Thank you!

We appreciate you serving as a Snap administrator for your agency!