



User Guide

ISOnet Administration

February 1, 2023

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Overview

The ISOnet Administration Application gives you a secure and convenient way to register users for individual products available through ISOnet – the information system for insurance professionals. The application also lets you track and manage your users and the products for which they’re registered. And with the ISOnet Administration Application, you’ll no longer need to use and manage registration keys. The application is available only to individuals authorized as product administrators (PA) for one or more ISOnet products. Using the application, you can:

- authorize or deauthorize users for individual products
- invite individuals who do not have ISOnet IDs to register for products
- authorize or deauthorize users as PAs
- invite individuals who do not have ISOnet IDs to register as PAs

You can authorize, deauthorize, or invite users and PAs only for the products for which you are a PA.

Product Administrator (PA) Login

To log in as a product administrator, go to the ISOnet home page, click SIGN IN, and select ISOnet Administration from the MY PRODUCTS menu.

MY PRODUCTS	PRODUCTS	EDUCATION	SUPPORT	TAKE SURVEY
ISOnet Administration	Emerging Issues	LOCATION® Territory Download	State Filing Forms For Workers Compensation	
Analytics Products	Employers Advantage	Market Landscape	State Filing Handbook	
Automated Symbols Lookup	Engineering & Safety	Mozart	Statistical Plans/Reporting Guide	
Capital Assets & Agri-CAP® Premium Calculators Download	ERC	Multi-Line Class Table		
Circulars	ERC+software	Participation Supplements Online/CLSM		
CMC Manual Plus	Fire Chiefs Online	Premium Audit Advisory Service		
CMC Revisions	FIRST	Premium Report Form		
Commercial Lines Manual	Forms Library	Print Ready Manuals		
Customer Invoice Details	IntegRater	Property Claim Services		
Data Editing Resources	ISO Portal	QC3 (Query Commercial Classification Code)		
DataCube/ Experience Profiler	ISO Risk Analyzer® Table Express	State Filing Forms		
EFD Updates	ISOPAX			
	Legislative Monitoring			

Welcome to ISOnet Administration Screen

When you have logged in, the system will take you to the Welcome to ISOnet Administration screen. The left menu on that screen has the following options:

- ISOnet Home – takes you to the ISOnet home page, where you can access the ISOnet products for which you are registered
- Administer Users – lets you search for your company’s ISOnet users and product administrators, view user details, authorize users as product administrators for individual products, deauthorize product administrators for individual products, and invite individuals without ISOnet IDs to register as product administrators for individual products
- Administer Products – lets you view your company’s used and total seats for products, view product administrators, deauthorize users and product administrators, and invite individuals to register as users or product administrators for individual products



The following sections of this User’s Guide explain how to use the Administer Users and Administer Products options.

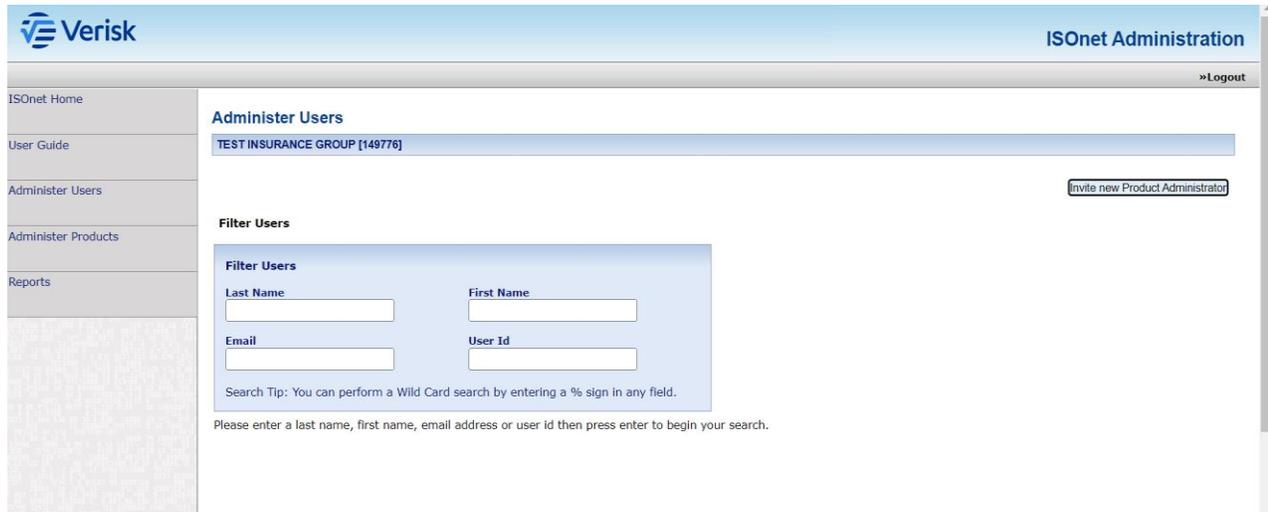
Administer Users

The Administer Users menu option lets you:

- search for your company’s ISOnet users and product administrators
- view user details
- authorize users as product administrators for individual products
- deauthorize product administrators for individual products
- invite individuals without ISOnet IDs to register as product administrators for individual products

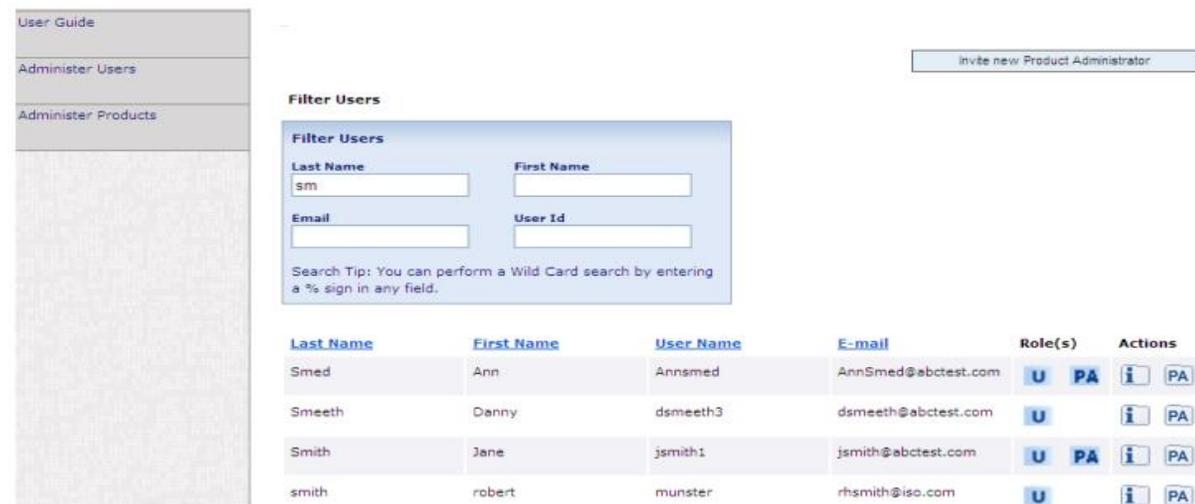
Searching for your company’s users and product administrators

To search for your company’s users and product administrators, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Users menu option. The system will take you to the Administer Users screen for your company or group.



To search for an individual, enter the person’s last name, first name, e-mail address, and/or ISOnet user ID into the appropriate fields in the Filter Users box. The system will return results that begin with the characters you enter. For example, if you enter the letters sm in the Last Name field, the system will return all users whose last name begins with sm – such as Smed, Smeeth, Smith, and so on.

You may also perform a wildcard search using the % sign to substitute for any string of characters. For example, if you enter sm%th, the system will return results such as Smeeth, Smith, Smyth, Smythe, and so on. This feature can be particularly helpful if you are uncertain of the spelling of a person’s name.



Note: If your search would return more than 100 results, the system will ask you to refine your search.

You may sort the results alphabetically by last name, first name, user name, or e-mail address. Simply click on the heading of the appropriate column.

The Role(s) column gives you information about the individual:



means the individual is an ISOnet user and has registered for one or more products.



means the individual is an ISOnet product administrator (PA) for one or more products

The Actions column lets you perform various tasks:



lets you view a person's user details, including the user profile, the products for which the person is a user, and the products for which the person is a PA.



lets you authorize a user as a PA for one or more products or authorize an existing PA as a PA for additional products

Viewing user details

To view user details, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Users menu option. The system will take you to the Administer Users screen for your company or group. Search for the user as described on page 3.

When you find the desired user, click the  button. The User Details window will pop up. The window has up to three tabs:

- User Profile
- Products
- PA Products (does not appear if the user is not an authorized Product Administrator [PA])

User Profile tab

The User Profile tab lets you view the user's contact information, account status, role(s), and last login time.

User Details
✕

User Profile
Products

User Name jsmith1	E-mail
First Name J	Last Name Smith
Job Title Secretary	Job Function
Address P. O. Box 1	
City Any City	Country
Zip Code 25434	State WV
Phone Number ()	Fax Number
Account Status	Role(s) ISONet User
Last Login	

Products tab

The Products tab lets you see the products a user is registered for. The tab also lets you deauthorize the user for one or more products. To deauthorize a user for a particular product, check the box next to the product and click the Deauthorize button.

User Details
✕

User Profile
Products

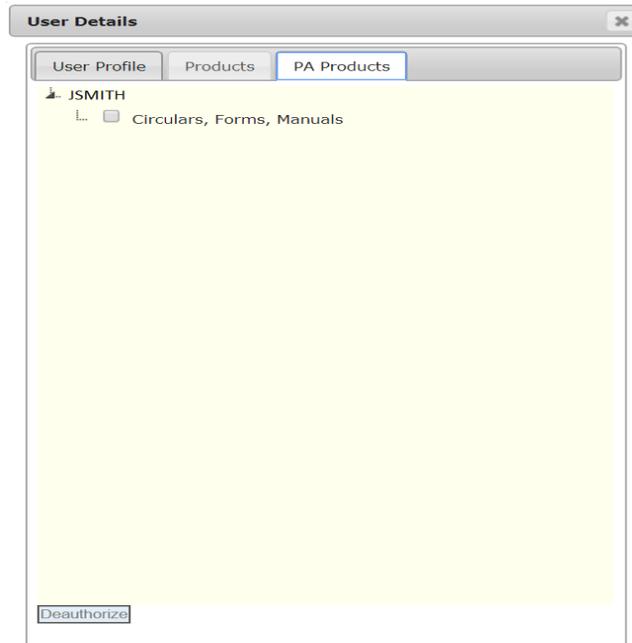
JSMITH

- Circulars, Forms, Manuals
 - Actuarial Service Electronic Solution (ACES) [106]
 - Circulars [94]
 - CLASS TABLE ISONET [227]
 - CLM [93]
 - EMERGING ISSUES PORTAL [272]
 - First [214]
 - Forms [92]
 - LMON-ISONET [237]
 - Motor Carrier Digest [211]
 - PLEMS View [191]
 - Policywriting Support Forms [223]
 - Print Ready Manuals [192]
- Property Claims Services (PCS)
 - PCS Catastrophe Bulletins [153]
 - PCS Catastrophe News [201]
 - PCS Claims [199]
 - PCS Daily Severe Weather Summaries [152]
 - PCS NATIONAL FLOOD INSURANCE PROGRAM DATA [3C
 - PCS Tropical Storm Tracking [154]

Deauthorize

PA Products tab

The PA Products tab lets you see the products for which a user is a product administrator (PA). The tab also lets you deauthorize a PA for one or more products. To deauthorize a PA for a particular product, check the box next to the product name and click the Deauthorize button. If the user you selected is not an authorized PA for any products, the PA Products tab will not appear in the User Details window.



Authorizing a product administrator

To authorize a user as a product administrator (PA), log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Users menu option. The system will take you to the Administer Users screen for your company or group. Search for the user as described on page 3.

When you find the desired user, click the  button.

User Guide

Administer Users

Administer Products

Invite new Product Administrator

Filter Users

Filter Users

Last Name: First Name:

Email: User Id:

Search Tip: You can perform a Wild Card search by entering a % sign in any field.

Last Name	First Name	User Name	E-mail	Role(s)	Actions
Smed	Ann	Annsmed	AnnSmed@abctest.com	U PA	i PA
Smeeth	Danny	dsmeeth3	dsmeeth@abctest.com	U	i PA
Smith	Jane	jsmith1	jsmith@abctest.com	U PA	i PA
smith	robert	munster	rhsmith@iso.com	U	i PA

The system will take you to the Select Products for Product Admin screen, where you may authorize the user as a PA for one or more products. To authorize the user for a particular product, check the box next to the product name and click the Assign Products button.

Select Products for Product Admin

Selected User

Smed, Ann (Annsmed)

Available Products

Select All Products

- AIR
- Circulars, Forms, Manuals
- CMC Revisions
- IntegRater
- Suite Plus

Assign Products

Once you have clicked the Assign Products button, the system will take you to a confirmation screen. You and the person you have just authorized will both receive confirmation e-mails.

ISOnet Home	<h3>Products Assigned</h3> <p>The following user is the Product Administrator for the following products</p> <p>John Smith (JSmith)</p> <p>Selected Products</p> <ul style="list-style-type: none"> • Analytics Products (2/50) • ISO Base Ratebooks (6/6) • Premium Audit Advisory Service (PAAS) (2/5) • Property Claims Services (PCS) (5/10) • State Filing Handbook (24/25)
User Guide	
Administer Users	
Administer Products	

Inviting a new product administrator who do not have an ISOnet ID

To invite an individual who does not have an ISOnet ID to register as a product administrator (PA), log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Users menu option. The system will take you to the Administer Users screen. Click the Invite New Product Administrator button.

Administer Users

TEST COMPANY 1 [24559]

Invite new Product Administrator

Filter Users

Filter Users

Last Name	First Name
<input type="text"/>	<input type="text"/>
Email	User Id
<input type="text"/>	<input type="text"/>

Search Tip: You can perform a Wild Card search by entering a % sign in any field.

Please enter a last name, first name, email address or user id to begin your search.

The system will take you to the Select Products for New Product Admin screen. Enter the e-mail address of the individual you would like to invite. (If you wish to invite more than one individual, use commas to separate their e-mail addresses.) Check the boxes next to the names of the products for which you want to invite the individual. Then click the Generate Invitation button

Select Products for New Product Admin

New Product Admin's email list (Please use comma to separate email addresses)

vsmith@abctest.com,awythe@abctest.com

Available Products

Select All Products

- | | |
|-------------------------------------|---------------------------|
| <input checked="" type="checkbox"/> | AIR |
| <input checked="" type="checkbox"/> | Circulars, Forms, Manuals |
| <input type="checkbox"/> | CMC Revisions |
| <input type="checkbox"/> | IntegRater |
| <input checked="" type="checkbox"/> | ISO Base Ratebooks |

Generate Invitation

The system will then take you to a confirmation screen. You and the person you just invited will both receive confirmation e-mails. For the person you invited, the e-mail will contain a link to a page where he or she can create a new user ID and password for ISOnet.

Product Admin Invitation Sent

The following user(s) have been invited to be the Product Administrator for the following products.

vsmith@abctest.com,awythe@abctest.com

Selected Products

- AIR
- Circulars, Forms, Manuals
- ISO Base Ratebooks

Administer Products

The Administer Products menu option lets you:

- view your company's used and total seats for products
- view product administrators
- deauthorize users and product administrators
- invite individuals to register as users or product administrators for individual products

Viewing your company's used and total seats for products

For each product available through ISOnet, your company has a certain number of "seats" available for users. Your total number of seats available depends on your contract with ISO for the individual product. When you 10 are authorizing users for individual products, you need to know how many seats your company has and how many are already in use.

To view your company's used and total seats for products, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Products menu option. The system will take you to the Administer Products screen for your company or group.

Administer Products

TEST COMPANY 1 [24559]		
Invite Users to Multiple Products		
Product (Used/Total Seats)	Admin Users	Actions
AIR (6/10)	Smed, Ann (AnnSmed@abctest.com) Smith, Jane (jsmith@abctest.com)	Manage Users Invite Users
MANUALS CIRCULARS DISTRIBUTION Invoices (20/1000)	Smith, Jane (jsmith@abctest.com)	Manage Users Invite Users
Premium Audit Advisory Service (PAAS) (2/5)	Smith, Jane (jsmith@abctest.com)	Manage Users Invite Users

The Product (Used/Total Seats) column of the Administer Products screen lists all products available to your company. After each product, you will see (in parentheses) the number of seats already assigned to users in your company and the total number of seats available to your company.

Product (Used/Total Seats)
AIR (6/10)
MANUALS CIRCULARS DISTRIBUTION Invoices (20/1000)
Premium Audit Advisory Service (PAAS) (2/5)

Viewing product administrators

To view lists of product administrators (PA) for all products available to your company, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Products menu option. You will be taken to the Administer Users screen for your company or group.

The Admin Users column lists the PAs for each product. The lists show the last name, first name, and e-mail address of each PA.

Admin Users
Smed, Ann (AnnSmed@abctest.com) Smith, Jane (jsmith@abctest.com)

Deauthorizing users and product administrators

To deauthorize users and product administrators (PA) for individual products, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Products menu option. You will be taken to the Administer Users screen for your company or group.

In the Product (Used/Total Seats) column, locate the product for which you want to deauthorize users and/or PAs. Then, in the Actions column, find the Manage Users button for the product. (If the Manage Users button is grayed out, the company has not authorized anyone as a user or PA for the product.)



Click the Manage Users button for the product. The system will take you to the Manage Users screen for the selected product.

To search for an authorized user or PA for the selected product, enter the person's last name, first name, e-mail address, and/or ISOnet user ID into the appropriate fields in the Filter Users box. The system will return results that begin with the characters you enter. For example, if you enter the letters sm in the Last Name field, the system will return all users whose last name begins with sm – such as Smed, Smeeth, Smith, and so on.

You may also perform a wildcard search using the % sign to substitute for any string of characters. For example, if you enter sm%th, the system will return results such as Smeeth, Smith, Smyth, Smythe, and so on. This feature can be particularly helpful if you are uncertain of the spelling of a person's name.

Note: If your search would return more than 100 results, the system will ask you to refine your search.



Manage Users

Selected Product

- Circulars, Forms, Manuals (55/55)

Filter Users

Filter Users

Last Name First Name

Email User Id

Search Tip: You can perform a Wild Card search by entering a % sign in any field.

Selected Users

Deauthorize Selected

Deauthorize User Products PA Products

✘ Smeeth, Danny (dsmeeth@abctest.com - dsmeeth3)

Last Name	First Name	User Name	E-mail	Role(s)	Actions
Smed	Ann	AnnSmed	AnnSmed@abctest.com	U PA	
Smeeth	Danny	dsmeeth3	dsmeeth@abctest.com	U	
Smith	Jane	jsmith1	jsmith@abctest.com	U PA	

You may sort the results alphabetically by last name, first name, user name, or e-mail address. Simply click on the heading of the appropriate column.

The Role(s) column gives you information about the individual:

- U** means the individual is an ISOnet user and has registered for one or more products.
- PA** means the individual is an ISOnet product administrator (PA) for one or more products.

The Actions column lets you perform various tasks:

- lets you view a person’s user details, including the user profile, the products for which the person is a user, and the products for which the person is a PA. (See page 4 for details.)
- lets you authorize a user as a PA for one or more products or authorize an existing PA as a PA for additional products. (See page 7 for details.)
- lets you select one or more people to deauthorize as users and/or PAs. In the results, locate the person or persons you wish to deauthorize. Click for each person you wish to deauthorize. Each person’s name will appear under Selected Users on the right side of the screen.

In the results, locate the person or persons you wish to deauthorize. Click for each person you wish to deauthorize. Each person’s name will appear under Selected Users on the right side of the screen.

Manage Users

Selected Product

- Circulars, Forms, Manuals (55/55)

Filter Users

Filter Users

Last Name <input type="text" value="sm"/>	First Name <input type="text"/>
Email <input type="text"/>	User Id <input type="text"/>

Search Tip: You can perform a Wild Card search by entering a % sign in any field.

Selected Users

Deauthorize User Products PA Products

- ✘ Smeeth, Danny (dsmeeth@abctest.com - dsmeeth3)
- ✘ Smith, Jane (jsmith@abctest.com - jsmith1)

Last Name	First Name	User Name	E-mail	Role(s)	Actions
Smed	Ann	Annsmmed	AnnSmed@abctest.com	U PA	PA <input checked="" type="checkbox"/>
Smeeth	Danny	dsmeeth3	dsmeeth@abctest.com	U	PA
Smith	Jane	jsmith1	jsmith@abctest.com	U PA	PA

When you have selected all the people you want to deauthorize, select the roles for which you want to deauthorize them. To deauthorize the people as users, check the box marked User Products. To deauthorize the people as PAs, check the box marked PA Products. You may check one box or both.

To complete the process, click the Deauthorize Selected button.

Once you have clicked the Deauthorize Selected button, the system will take you to a confirmation screen. You will also receive a confirmation e-mail.

Administer Users

The following user id's were successfully **de-authorized**

- dsmeeth3
 - jsmith1
- from TEST COMPANY 1 for the products:
- Circulars, Forms, Manuals

Note: With this process, you are deauthorizing people as users and/or PAs only for the originally selected product. Even if you deauthorize a person for all products, the person will remain in the system for 60 days. To remove a person from the system, you must delete his or her user ID. To do that, please contact Verisk Customer Support at 1-800-888-4476 or send an e-mail to ISOnetadmin@verisk.com.

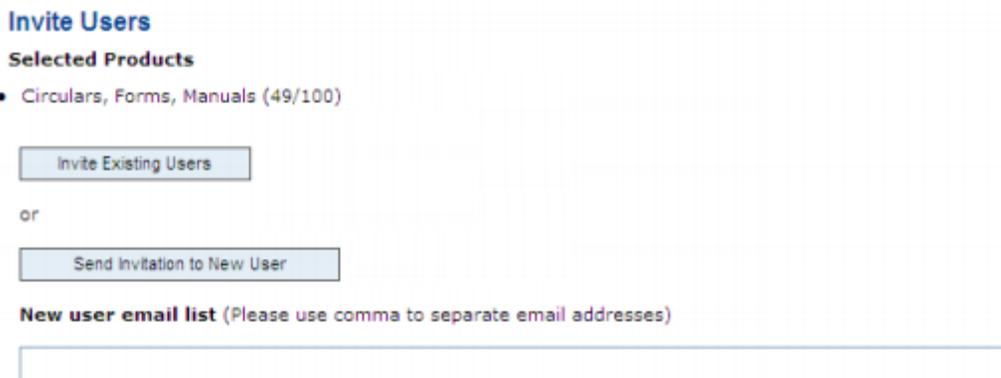
Inviting individuals to register as users

To invite individuals to register as users for individual products, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Products menu option. The system will take you to the Administer Products screen for your company or group.

In the Product (Used/Total Seats) column, locate the product for which you want to invite users. Then, in the Actions column, find the Invite Users button for the product. (If the Invite Users button is grayed out, your company has used all available seats, and you will not be able to invite a new user for the product.)



Click the Invite Users button for the product. The system will take you to the Invite Users screen. On the Invite Users screen, you have the option to invite existing users or send an invitation e-mail that will invite a new user for the selected product



Inviting users who already have ISOnet IDs

To invite users who already have ISOnet IDs, click the Invite Existing Users button. The system will take you to the Invite Users screen for the selected product.

To search for an existing user, enter the person's last name, first name, e-mail address, and/or ISOnet user ID into the appropriate fields in the Filter Users box. The system will return results that begin with the characters you enter. For example, if you enter the letters sm in the Last Name field, the system will return all users whose last name begins with sm – such as Smed, Smeeth, Smith, and so on.

You may also perform a wildcard search using the % sign to substitute for any string of characters. For example, if you enter sm%th, the system will return results such as Smeeth, Smith, Smyth, Smythe, and so on. This feature can be particularly helpful if you are uncertain of the spelling of a person's name.

Note: If your search would return more than 100 results, the system will ask you to refine your search.

In the results, locate the person or persons you wish to invite. Click for each person you wish to invite. Each person's name will appear under Selected Users on the right side of the screen. When you have selected all the people you wish to invite, click the Invite Selected Users button.

Invite Users

Selected Products

- AIR (6/10)

Available Users

Filter Users

Last Name

First Name

Email

User Id

Search Tip: You can perform a Wild Card search by entering a % sign in any field.

Selected Users

Invite Selected Users

✕ Smeeth, Danny (dsmeeth@abctest.com - dsmeeth3)

Last Name	First Name	User Name	E-mail	Role(s)	Actions
Smed	Ann	Annsmed	AnnSmed@abctest.com	U PA	
Smeeth	Danny	dsmeeth3	dsmeeth@abctest.com	U	

Once you have clicked the Invite Selected Users button, the system will take you to a confirmation screen. You will also receive a confirmation e-mail. The users you invited will also receive confirmation e-mails informing them that you have invited them to register for a new product.

Invite Users

You submitted a registration request for the user(s) and ISOnet Product(s) listed below:

User(s)

- Smeeth, Danny (dsmeeth@abctest.com - dsmeeth3)

ISOnet Product(s)

- AIR (7/10)

All your submissions were processed successfully.

Inviting individuals who do not have ISOnet IDs

To invite individuals who do not have ISOnet IDs to register as users, enter email address and click the Send Invitation to New User button. The system will take you to a confirmation screen. An automated email with a link that allows individuals to register for the product you chose will be sent to both the email address you entered and yourself as confirmation. The email will expire after 14 days.

Inviting individuals to register for multiple products

Invite Users

Email Generation Confirmation

You have successfully generated an ISOnet registration invitation for the products you selected. An email that contains the registration instructions has been sent to following email address(es)

kroberts@testcompany1.com

Selected Products

- Circulars, Forms, Manuals (49/100)

To invite individuals to register for multiple products, log in as a product administrator, go to the Welcome to ISOnet Administration screen, and click the Administer Products menu option. The system will take you to the Administer Products screen for your company or group. Click the Invite Users to Multiple Products button. The system will take you to the Select Products screen.

Administer Products

TEST COMPANY 1 [24559]

Invite Users to Multiple Products

Check the boxes for the products you wish to select. (If a product is grayed out, your company has used all available seats, and you will not be able to invite a new user for the product.) When you have selected the products, click the Invite Existing Users button (see page 14 for details) or the Send Invitation to New User button (see page 15 for details).

Select Products

TEST COMPANY 1 [24559]

Available Products (Occupied/Total Seats)

Select All Products

Analytics Products (2/50)

Circulars, Forms, Manuals (49/100)

Suite Plus (0/1)

Invite Existing Users

or

Send Invitation to New User

New user email list (Please use comma to separate email addresses)

Administer E-mail Domains

If you would like to monitor the e-mail domains allowed to access your company's products, please contact Verisk Customer Support at 1-800-888-4476 or send an e-mail to ISOnetadmin@verisk.com

Registered User Reports

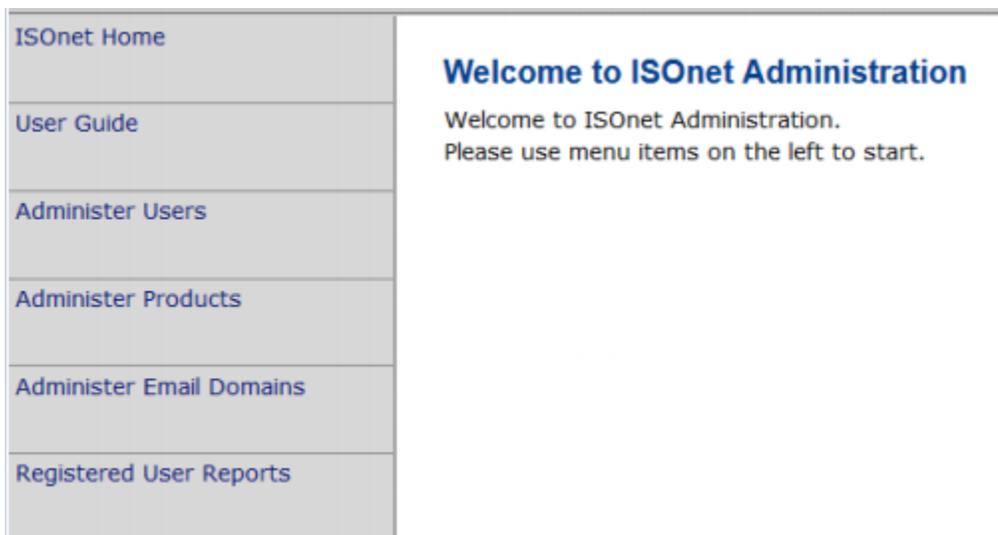
The Registered User Reports allows you to see

- Who is registered for each product
- User's First name, Last name and Username
- Date they registered
- Physical address
- Email address
- Title and Responsible Area

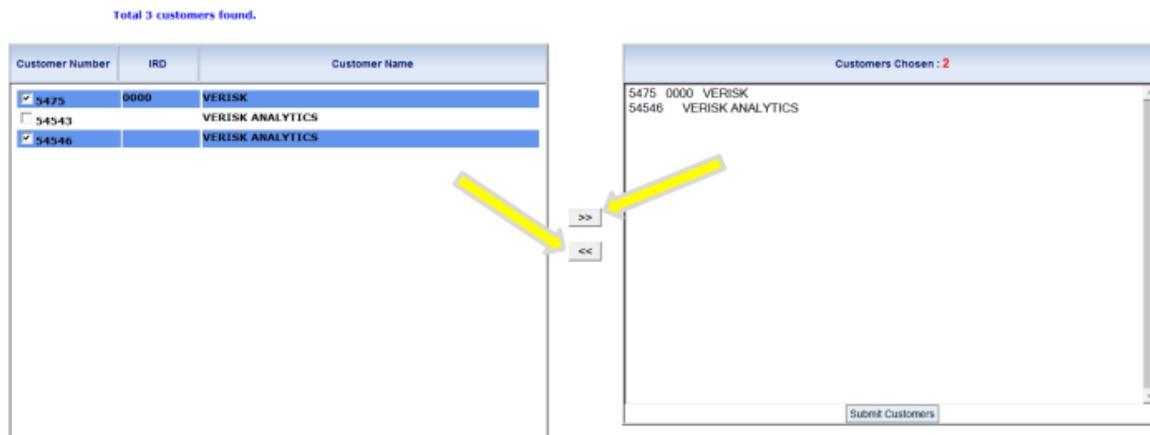
This report is displayed in an excel file.

To generate a User Report

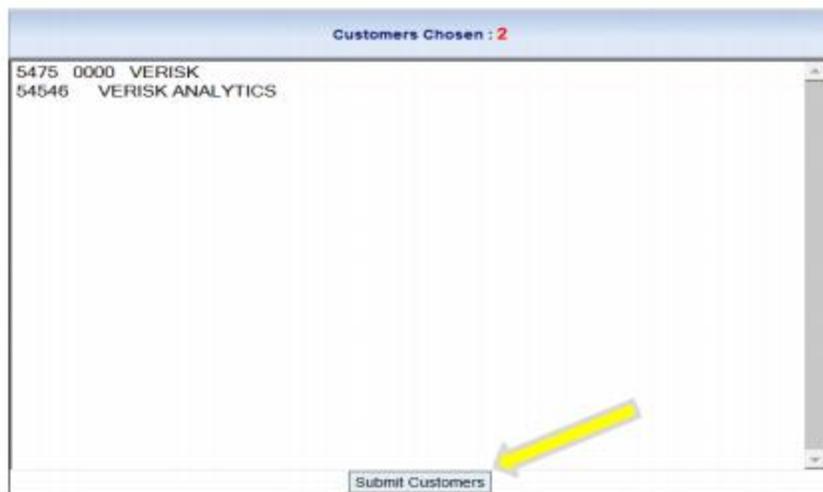
Once in ISO Admin you will see a link to Registered user Reports, this is the last tab on the left hand side menu.



If you are the product admin for multiple companies within a group, all of those companies will populate as seen in the box on the left. You can select individual companies or all companies that appear, to run the report on. (If you are the PA for one company in a group or a part of a company that is not in a group, only that company will appear.) The selected companies will be highlighted in blue. Once a company or companies are highlighted you can shift the selected companies to the box on the right. The arrows between the boxes are used to move the companies back and forth between the left and right boxes. The box on the right is the list of companies that the report will be run on.



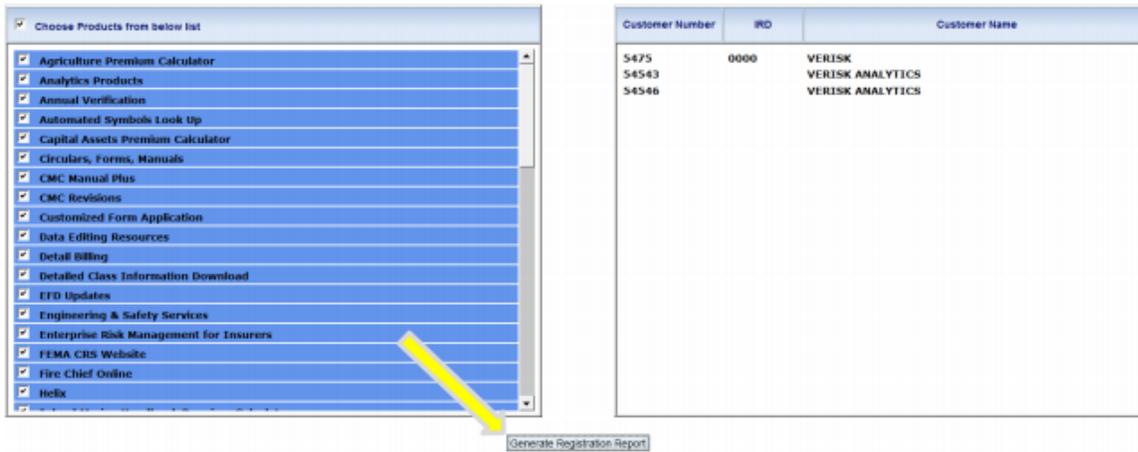
Once the final list of companies is decided on the right hand screen you will be able to, submit these companies to select the products for the report to be run on. This is done by clicking on the Submit Customers button at the bottom of the box on the right.



After selecting the companies you will be shown two more boxes the box on the left will display all of the products that the selected companies currently subscribe to. The box on the right is the name of the company or companies that these products are selected from.

In the left box you can select individual products, multiple products or all products. If you wish to select all products you can check off the box next to Choose Products from below list. If you wish to select specific products you will need to check the box next to each specific product. This will highlight the products name in blue. All products highlighted in blue will be included in the report.

Once you have selected the products you wanted click the button below that says Generate Registration Report.



Choose Products from below list

- Agriculture Premium Calculator
- Analytics Products
- Annual Verification
- Automated Symbols Look Up
- Capital Assets Premium Calculator
- Circulars, Forms, Manuals
- CMC Manual Plus
- CMC Revisions
- Customized Form Application
- Data EdBing Resources
- Detail Billing
- Detailed Class Information Download
- EFD Updates
- Engineering & Safety Services
- Enterprise Risk Management for Insurers
- FEMA CRS Website
- Fire Chief Online
- Helix

Customer Number	IRD	Customer Name
5475	0000	VERISK
54543		VERISK ANALYTICS
54546		VERISK ANALYTICS

Generate Registration Report

After clicking Generate Registration Report, in orange “Download Report” will appear. After clicking on “Download Report” the report in excel format will pop up on your desktop for you to open.

Generate Registration Report

Report generation completed.. [Download Report](#)

Product Administrator (PA) Logout

To leave the ISOnet Administration Application, click the Logout button in the upper right corner of the screen. The system will take you to the ISOnet Subscriber Login Screen.