



## OSIP Operations Manual

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## Admin instructions

### Manage registered users

**Introduction:** The OSIP website enables users i.e. brokers or members, to register on the website. The job of the admin is to authenticate the users and to make sure that they are who they claim they are.

The goal is to authenticate a newly registered user within 48 hours.

Below is illustrated a step by step process of what occurs when a user registers:

1. A new member registers by pressing the registration button on the website

The screenshot shows the OSIP (Offshore Insurance Placements) website. The header includes the OSIP logo and a navigation menu with links: Home, News, About us, Help, and Contact us. On the left, there is a registration form with fields for Username and Password, a 'Remember me' checkbox, and buttons for 'Login' and 'Register'. The 'Register' button is circled in red. Below the form, there is a section for 'RV7' with logos for SAIA and another company. The main content area has two sections: 'Information' and 'Web Browser'. The 'Information' section contains a message from a visitor and contact information for Ursula Moosa from SAIA and Tshidi Khutlape from the FSB. The 'Web Browser' section encourages users to upgrade their browser and lists logos for Firefox 3, Opera software, Internet Explorer 7, and Google Chrome. The footer of the website states: 'Copyright 2009 Offshore Insurance Placement. All rights reserved.'



2. The registration is complete for a broker or a member



[Home](#) [News](#) [About us](#) [Help](#) [Contact us](#)

☐ Remember me  
  
[Lost Password?](#)  
[No account yet? Register](#)

RV7



### Registration

Fields marked with an asterisk (\*) are required.

Name: *	<input type="text" value="Mr. X Broker"/>
Username: *	<input type="text" value="mx"/>
E-mail: *	<input type="text" value="mx@procre8.co.za"/>
Password: *	<input type="password" value="....."/>
Verify Password: *	<input type="password" value="....."/>

### Extended Details

Company Name	<input type="text" value="X Broker Firm"/>	Required
Type (member or broker)	<input type="text" value="Broker"/>	Required
telephone	<input type="text" value="0113354587"/>	Required
cell	<input type="text" value="0828889965"/>	Required
fax	<input type="text" value="0113354587"/>	Required
company registration number	<input type="text" value="2007/11235/002"/>	Required
physical address	<input type="text" value="3rd road X street Johannesburg"/>	Required

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3. The new registered user will receive the following details via email.



*Hello NAME,*

*Thank you for registering at OSIP. Your account is created and will be authenticated by staff usually in 48 hours.*

*After activation you may login to <http://www.osip.co.za> using the following username and password:*

*Password - PASS*

*Username - USER*

**4. All website admin's (SAIA and FSB) will receive the following email.**

*Hello YOURNAME,*

*A new User has registered at OSIP.*

*This e-mail contains their details:*

*Name – NAME*

*E-mail - EMAIL*

*Username – USERNAME*

*Please do not respond to this message as it is automatically generated and is for information purposes only*





[Home](#) [News](#) [About us](#) [Help](#) [Contact us](#)

☐ Remember me

[Lost Password?](#)

[No account yet? Register](#)

RV7

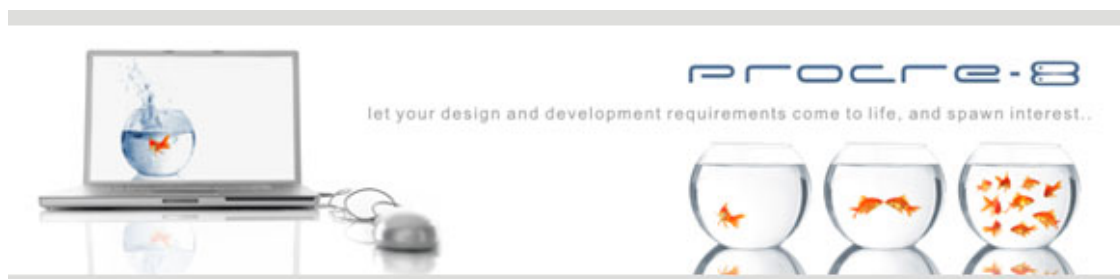


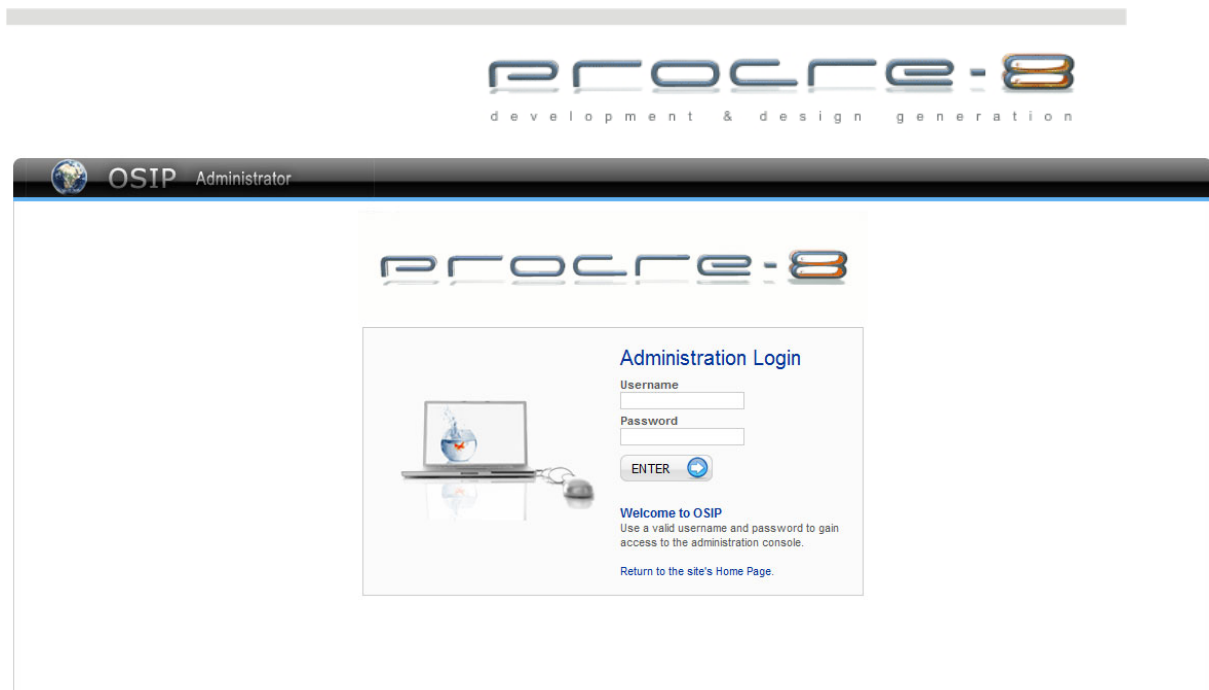
### Registration Complete!

Your account has been created and will be authenticated by staff usually in 48 hours. Please contact us should you have any problems.

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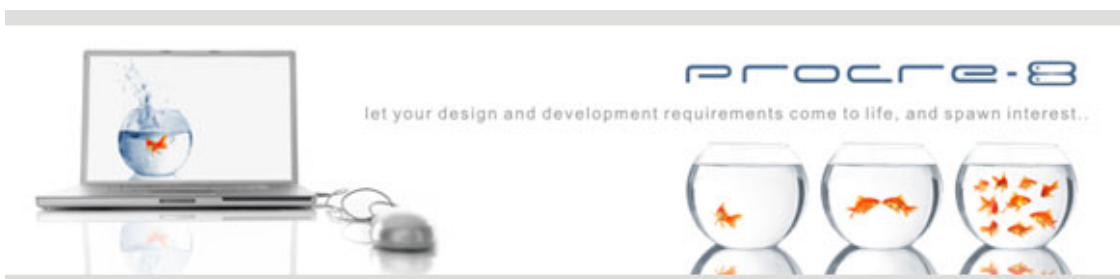
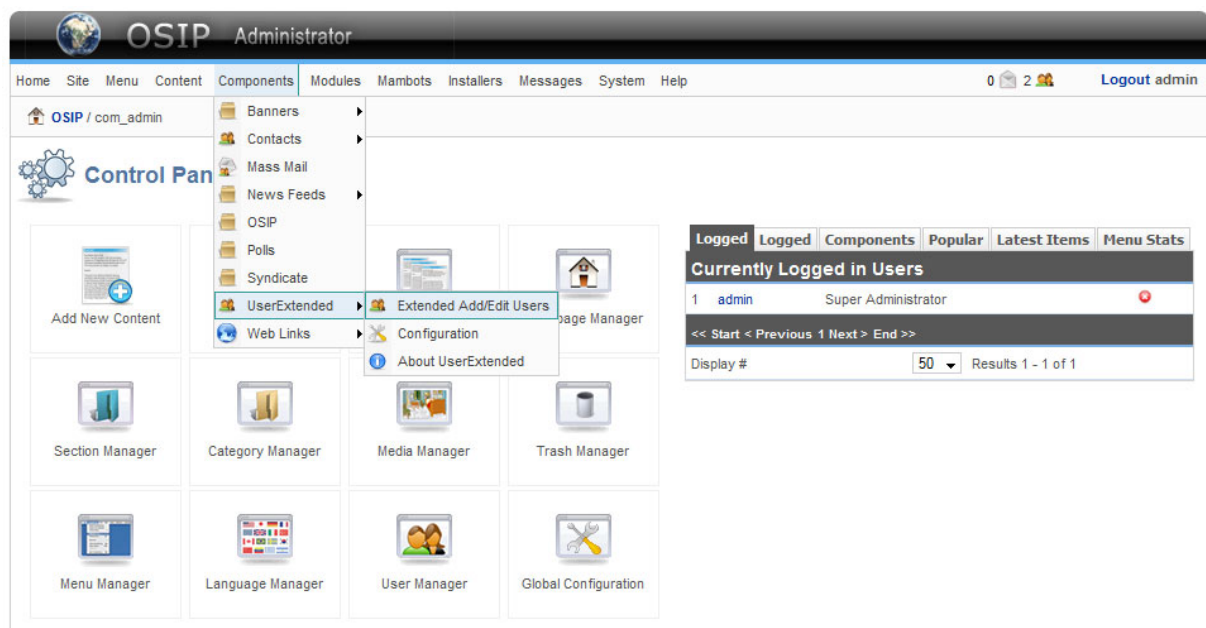
5. The information has to be validated and checked. You will have to log into the backend of the website. To do this please go to <http://www.osip.co.za/administrator/>






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6. Now please log in with your provided user name and password.
7. Once logged in you will see the control panel area. Please go to components -> user extended ->





8. You will see a list of all users. On the right hand side you either see a green tick or a red cross. The tick means that the user has been authenticated and can log in. If there is a red cross it means that the user has not yet been authenticated. Please look for the user who needs to be validated.



**OSIP Administrator**

[Home](#) [Site](#) [Menu](#) [Content](#) [Components](#) [Modules](#) [Mambots](#) [Installers](#) [Messages](#) [System](#) [Help](#)

0 2 [Logout admin](#)

[OSIP / com\\_user\\_extended](#)

[New](#) [Edit](#) [Delete](#)



**User  
Extended  
Component**

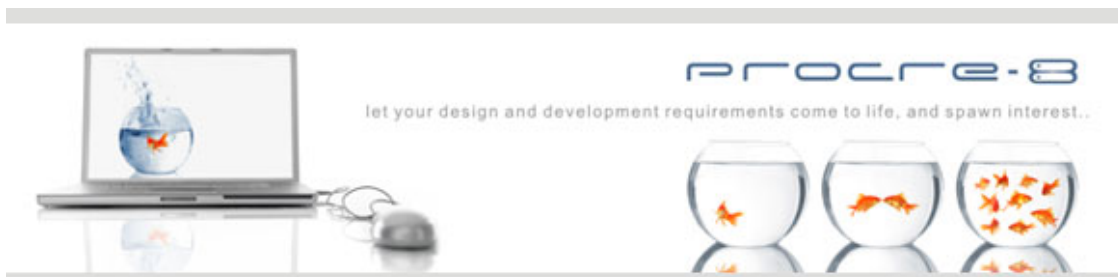
www.sachmann.com

Display # 50 Search:


### User Extended Manager

#	Name	UserID	Group	E-Mail	Last Visit	Enabled
1	mem1	mem1	Registered	mem@procre8.co.za	2008-11-04 12:16:25	✖
2	Ian Wild (Allianz)	wildi	Registered	wildi@allianz.co.za	2008-10-02 08:38:48	✔
3	Terence Stander (Allianz)	standert	Registered	standert@allianz.co.za	0000-00-00 00:00:00	✔
4	Steve Forgaty (AIG)	forгатys	Registered	steve.fogarty@aig.com	2009-01-21 11:00:04	✔
5	David Rijnjes (Santam)	rijntjesd	Registered	david.rijntjes@santam.co.za	2008-08-18 15:04:18	✔
6	Phil Lowrie (Mutual and Federal)	lowriep	Registered	plowrie@mf.co.za	2008-12-08 10:15:08	✔
7	Franscois Engels (Firedart)	engelsf	Registered	engels@firedart.co.za	2008-11-12 10:30:40	✔
8	Michael Steensma (Mutal & Federal)	steensmam	Registered	msteensm@mf.co.za	0000-00-00 00:00:00	✔
9	Grant Cloutman	cloutmang	Registered	gcloutma@mf.co.za	2008-10-21 09:52:48	✔
10	tshidimember	tshidimember	Registered	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
11	Mr. X Member	mxm	Registered	mxm@procre8.co.za	0000-00-00 00:00:00	✖
12	broker1	broker1	Manager	broker@procre8.co.za	2008-08-27 16:32:43	✖
13	Ana Wilson	WilsonAna	Manager	wilsonana@forbes.co.za	2009-01-07 13:11:52	✔
14	ba1	ba1	Administrator	ba1@procre8.co.za	2008-11-04 12:16:45	✖
15	Helene Smith (Alexander Forbes)	smithh	Administrator	smithh@forbes.co.za	2009-01-21 11:00:29	✔
16	Irene Best (AON)	besti	Administrator	irene_best@aon.co.za	2008-04-18 08:29:31	✔
17	Kim Oosthuizen (Glenrand MIB)	oostheizenk	Administrator	koostheizen@glenrandmib.co.za	0000-00-00 00:00:00	✔
18	Clive Boyd (Marsh)	boydc	Administrator	cliveboyd@marsh.co.za	0000-00-00 00:00:00	✔
19	Dennis Wallace (Eikos)	wallaced	Administrator	wallaced@eikos.co.za	0000-00-00 00:00:00	✔
20	Leigh-Ann Forrester (Jankelow)	forresterla	Administrator	Leighannf@jankelow.co.za	0000-00-00 00:00:00	✔
21	Khlosia Amit (Lloyd)	amitk	Administrator	ak@lloydssa.co.za	0000-00-00 00:00:00	✔
22	tshidibrokeradmin	tshidibrokeradmin	Administrator	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
23	Administrator	admin	Super Administrator	phil@procre8.co.za	2009-01-21 13:57:49	✔


9. Once you found the user please click on his/hers username.



10. You can now see their registration details. If you click on the next tab “extended”, you can see the users details. Please double check them. Once you have cross checked the details and are satisfied that this user is a genuine member or broker, you can now authenticate.


 **OSIP** Administrator

Home Site Menu Content Components Modules Mambots Installers Messages System Help

0 2  Logout admin

OSIP / com\_user\_extended / edit

Save Cancel

 **User Extended Component**  
[www.zechmann.com](http://www.zechmann.com)

**Edit User Extended**

**Core** Extended

Name:	Mr. X Member
Username:	mxm
Email:	mxm@procre8.co.za
New Password:	
Verify Password:	
Group:	<div>Public Frontend Registered - Author - Editor</div>
Block User	Yes
Register Date	2009-01-21 13:54:28
Last Visit Date	0000-00-00 00:00:00

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Home Site Menu Content Components Modules Mambots Installers Messages System Help 0 2 Logout admin

OSIP / com\_user\_extended / edit Save Cancel

 User Extended Component  
www.zechmann.com

**Edit User Extended**

Core Extended

**Extended Details**

Company Name	X Member Company	Required
Type (member or broker)	Member	Required
telephone	0113354587	Required
cell	0828889965	Required
fax	0113354587	Required
company registration number	2007/11235/002	Required
physical address	3rd road X street Johannes	Required


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11. **IMPORTANT:** To make the current user a broker you need to select administrator under group.
12. **IMPORTANT:** To authenticate a member you need to select registered under group.

**OSIP Administrator**

Home Site Menu Content Components Modules Mambots Installers Messages System Help 0 2 Logout admin

OSIP / com\_user\_extended / edit Save Cancel

 User Extended Component  
www.zechmann.com

**Edit User Extended**

Core Extended

Name:	Mr. X Member
Username:	mixm
Email:	mixm@procre8.co.za
New Password:	
Verify Password:	
Group:	<div> Public Frontend  Registered  - Author  - Editor </div>
Block User	Yes
Register Date	2009-01-21 13:54:28
Last Visit Date	0000-00-00 00:00:00



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13. Double check all the details, if everything is correct select “Block User” no and press save (top right).

OSIP Administrator

Home Site Menu Content Components Modules Mambots Installers Messages System Help

0 2 Logout admin

OSIP / com\_user\_extended / edit

Save Cancel

User Extended Component

www.sechmann.com

Edit User Extended

Core Extended

Name: Mr. X Member

Username: mxm

Email: mxm@procre8.co.za

New Password:

Verify Password:

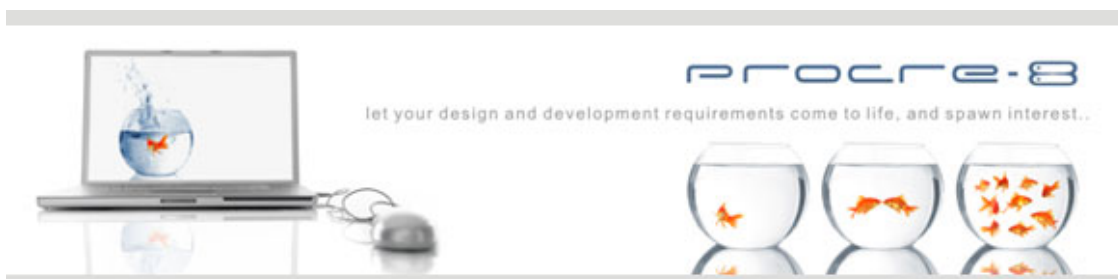
Group: Public Frontend  
- Registered  
- Author  
- Editor

Block User: Yes

Register Date: 2009-01-21 13:54:28

Last Visit Date: 0000-00-00 00:00:00

14. Should you want to ban a user. Click on the cross or tick in the enable Colum, in the row where the users name appears. This will enable or disable the user’s access to the front end.



OSIP Administrator

Home Site Menu Content Components Modules Mambots Installers Messages System Help

0 2 Logout admin

OSIP / com\_user\_extended

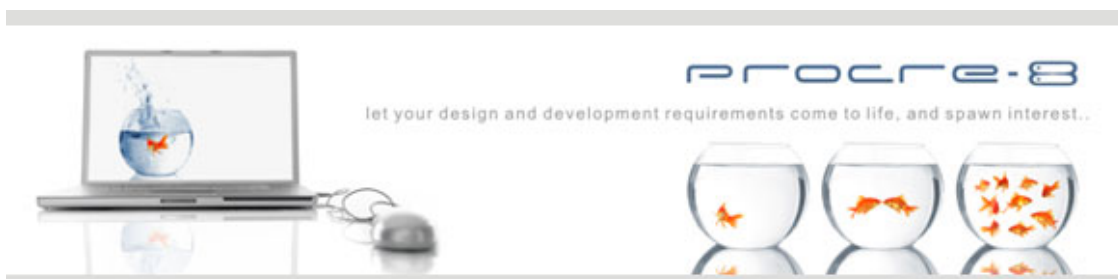
New Edit Delete

Display # 50 Search:

User Extended Manager

#	Name	UserID	Group	E-Mail	Last Visit	Enabled
1	mem1	mem1	Registered	mem@procre8.co.za	2008-11-04 12:16:25	✖
2	Ian Wild (Allianz)	wildi	Registered	wildi@allianz.co.za	2008-10-02 08:38:48	✔
3	Terence Stander (Allianz)	standert	Registered	standert@allianz.co.za	0000-00-00 00:00:00	✔
4	Steve Forgaty (AIG)	forgatys	Registered	steve.forgaty@aig.com	2009-01-21 11:00:04	✔
5	David Rintjes (Santam)	rintjesd	Registered	david.rintjes@santam.co.za	2008-08-18 15:04:18	✔
6	Phil Lowrie (Mutual and Federal)	lowriep	Registered	plovrie@mf.co.za	2008-12-08 10:15:08	✔
7	Franscois Engels (Firedart)	engelsf	Registered	engels@firedart.co.za	2008-11-12 10:30:40	✔
8	Michael Steensma (Mutal & Federal)	steensmam	Registered	msteensm@mf.co.za	0000-00-00 00:00:00	✔
9	Grant Cloutman	cloutmang	Registered	gcloutma@mf.co.za	2008-10-21 09:52:48	✔
10	tshidimember	tshidimember	Registered	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
11	Mr. X Member	mxm	Registered	mxm@procre8.co.za	0000-00-00 00:00:00	✖
12	broker1	broker1	Manager	broker@procre8.co.za	2008-08-27 16:32:43	✖
13	Ana Wilson	WilsonAna	Manager	wilsonana@aforbes.co.za	2009-01-07 13:11:52	✔
14	ba1	ba1	Administrator	ba1@procre8.co.za	2008-11-04 12:16:45	✖
15	Helene Smith (Alexander Forbes)	smithh	Administrator	smithh@aforbes.co.za	2009-01-21 11:00:29	✔
16	Irene Best (AON)	besti	Administrator	irene_best@aon.co.za	2008-04-18 08:29:31	✔
17	Kim Oostheizen (Glenrand MIB)	oostheizenk	Administrator	koostheizen@glenrandmib.co.za	0000-00-00 00:00:00	✔
18	Clive Boyd (Marsh)	boydc	Administrator	cliveboyd@marsh.co.za	0000-00-00 00:00:00	✔
19	Dennis Wallace (Eikos)	wallaced	Administrator	wallaced@eikos.co.za	0000-00-00 00:00:00	✔
20	Leigh-Ann Forrester (Jankelow)	forresterla	Administrator	Leighannf@jankelow.co.za	0000-00-00 00:00:00	✔
21	Khlosia Amit (Lloyd)	amitk	Administrator	ak@lloydssa.co.za	0000-00-00 00:00:00	✔
22	tshidibrokeradmin	tshidibrokeradmin	Administrator	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
23	Administrator	admin	Super Administrator	phil@procre8.co.za	2009-01-21 13:57:49	✔

15. If you would like to add a user yourself in the backend simply press on new (top right hand side) and add the new user. **Remember** to use “superadmin” as admin, “administrator” as broker admin, and “registered” as member.



OSIP Administrator

Home Site Menu Content Components Modules Mambots Installers Messages System Help

0 2 Logout admin

OSIP / com\_user\_extended

New Edit Delete

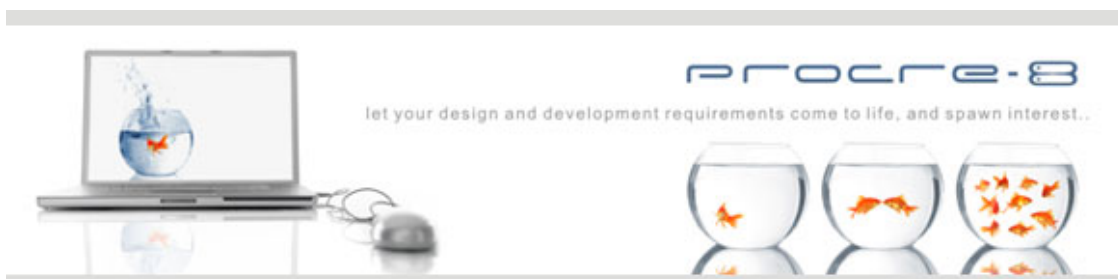
Display # 50 Search:

User Extended Manager

#	Name	UserID	Group	E-Mail	Last Visit	Enabled
1	mem1	mem1	Registered	mem@procre8.co.za	2008-11-04 12:16:25	✖
2	Ian Wild (Allianz)	wildi	Registered	wildi@allianz.co.za	2008-10-02 08:38:48	✔
3	Terence Stander (Allianz)	standert	Registered	standert@allianz.co.za	0000-00-00 00:00:00	✔
4	Steve Forgyat (AIG)	forgatys	Registered	steve.forgaty@aig.com	2009-01-21 11:00:04	✔
5	David Rintjes (Santam)	rintjesd	Registered	david.rintjes@santam.co.za	2008-08-18 15:04:18	✔
6	Phil Lowrie (Mutual and Federal)	lowriep	Registered	plovrie@mf.co.za	2008-12-08 10:15:08	✔
7	Franscois Engels (Firedart)	engelsf	Registered	engels@firedart.co.za	2008-11-12 10:30:40	✔
8	Michael Steensma (Mutal & Federal)	steensmam	Registered	msteensm@mf.co.za	0000-00-00 00:00:00	✔
9	Grant Cloutman	cloutmang	Registered	gcloutma@mf.co.za	2008-10-21 09:52:48	✔
10	tshidimember	tshidimember	Registered	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
11	Mr. X Member	mxm	Registered	mxm@procre8.co.za	0000-00-00 00:00:00	✖
12	broker1	broker1	Manager	broker@procre8.co.za	2008-08-27 16:32:43	✖
13	Ana Wilson	WilsonAna	Manager	wilsonana@aforbes.co.za	2009-01-07 13:11:52	✔
14	ba1	ba1	Administrator	ba1@procre8.co.za	2008-11-04 12:16:45	✖
15	Helene Smith (Alexander Forbes)	smithh	Administrator	smithh@aforbes.co.za	2009-01-21 11:00:29	✔
16	Irene Best (AON)	besti	Administrator	irene_best@aon.co.za	2008-04-18 08:29:31	✔
17	Kim Oostheizen (Glenrand MIB)	oostheizenk	Administrator	koostheizen@glenrandmib.co.za	0000-00-00 00:00:00	✔
18	Clive Boyd (Marsh)	boydc	Administrator	cliveboyd@marsh.co.za	0000-00-00 00:00:00	✔
19	Dennis Wallace (Eikos)	wallaced	Administrator	wallaced@eikos.co.za	0000-00-00 00:00:00	✔
20	Leigh-Ann Forrester (Jankelow)	forresterla	Administrator	Leighannf@jankelow.co.za	0000-00-00 00:00:00	✔
21	Khlosia Amit (Lloyd)	amitk	Administrator	ak@lloydssa.co.za	0000-00-00 00:00:00	✔
22	tshidibrokeradmin	tshidibrokeradmin	Administrator	tshidik@fsb.co.za	0000-00-00 00:00:00	✔
23	Administrator	admin	Super Administrator	phil@procre8.co.za	2009-01-21 13:57:49	✔

16. You can see that the user no longer has a red cross but a green tick. This means that they can now log into the frontend.

17. Your job is now done and you can logout by pressing the logout button on the top right. This will take you back to the home page.



## Managing submission

**Introduction:** The OSIP website enables the admin to view save and monitor the progress of the RV7 applications. The aim is to monitor proceedings and to download files for record keeping and further processing.

Illustrated below is the step by step process:

1. When a broker made a new submission or if a member objects to a submission you will receive an email. The email will look similar to the one below, depending on the template used by the broker admin.

*Dear YOURNAME,*

*A new form has just been submitted by broker and has been verified by broker.*

*To view this new submission please login to OSIP.*

*Yours, the OSIP web team.*

*This message has been automatically generated - please do not reply to this email address*


2. Once you have received the email please log into the website by visiting <http://www.osip.co.za/>. Enter your username and password on the left hand side and press login. If you press "remember me" the website will remember your details and log you in automatically on your next visit (this however depends on your browser settings).





[Home](#)

[A+](#) [A-](#) [RESET](#)



[Home](#) [News](#) [About us](#) [Help](#) [Contact us](#)

Username  
admin

Password  
••••••••


☐ Remember me

Login

[Lost Password?](#)

[No account yet? Register](#)

RV7



### Information

Dear Visitor,

We need your help to test.

So please log in and test the system. If you do not have an user name or a password for testing please send an email to [phil@procre8.co.za](mailto:phil@procre8.co.za) or phone 011-726-8991 (ask for philipp).

You can also contact or Ursula Moosa from SAIA on 011-726-5381 [Ursula@saia.co.za](mailto:Ursula@saia.co.za) or Tshidi Khutlape from the FSB on 012-422-2982 [tshidik@fsb.co.za](mailto:tshidik@fsb.co.za) should you have any questions.





### Web Browser

Upgrade you online experiance! If you are using Internet Explorer 6 or lower, you should upgrade.

A few reasons to upgrade are web page compatibility, security and new technology advancements.

Upgrade is **FREE**.

Click on the images to upgrade.



3. If you have forgotten your user name or password press lost password. Enter your email address and username and a new password will be sent to you via email.





A+ A- RESET



Home News About us Help Contact us

Username

Password

☐ Remember me

Login

[Lost Password?](#)

No account yet? [Register](#)

RV7



**Lost your Password?**

Please enter your Username and e-mail address then click on the Send Password button. You will receive a new password shortly. Use this new password to access the site.

Username:

E-mail Address:

Send Password

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- After you have pressed login you will be taken to the RV7 section of the website. The first thing you see will be the dashboard that will display three tabs. "Submissions", "archives" and "my profile".





OSIP  
OFFSHORE INSURANCE PLACEMENTS



A+ A- RESET

Home

News

About us

Help

Contact us

Hi, admin

Logout

## Dashboard

Submissions

Archives

My profile

Submitted by	Insured name	Start and end date	Objections	Actions
broker	Tom Jones Aerflot (pls ignore this is a test submission for the manual)	23/01/2009 to 20/05/2011	1	<a href="#">details</a>

<< Start < Previous Next > End >>

Display # 20 Results 1 - 20 of 1

RV7



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## Submissions

1. Under submissions you will be able to see all the different submission. To view them in detail please click on one.




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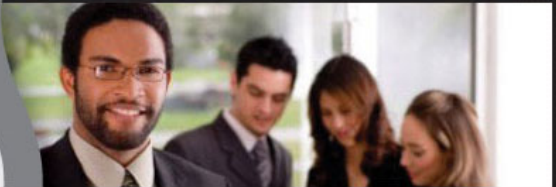
let your design and development requirements come to life, and spawn interest..



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**OSIP**  
OFFSHORE INSURANCE PLACEMENTS




[Home](#)
[News](#)
[About us](#)
[Help](#)
[Contact us](#)

Hi, admin

[Logout](#)

---

RV7




### Dashboard

Submissions
Archives
My profile

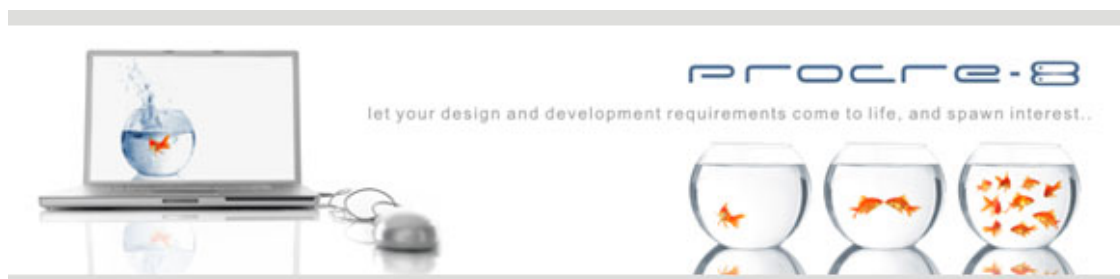
Submitted by	Insured name	Start and end date	Objections	Actions
broker	Tom Jones Aerflot (pls ignore this is a test submission for the manual)	23/01/2009 to 20/05/2011	1	<a href="#">details</a>

<< Start < Previous Next > End >>

Display # 20 Results 1 - 20 of 1

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2. You can now view all the details of the submission and save it for the record as csv (tab separated value), as a rtf text document (rich text format).





OSIP  
OFFSHORE INSURANCE PLACEMENTS



A+ A- RESET

Home

News

About us

Help

Contact us

Hi, admin

Logout

### Submission detail

Submissions

Archives

My profile

[Download as text document](#)  
[Export and tab separated values file](#)

I, the undersigned, being a/the  
Mr X (test submission for manual)

of  
Big Planes Pty Ltd (test submission for manual)

hereby apply for approval to place insurance with underwriters other than South African short-term  
insurers and/or Lloyd's underwriters.

The following information is provided in support of the application.

- 1 Indicate the status of this application (Refer to items 5 and 6 of Part A.)  
provisional
- 2 State the address of the intermediary/Lloyds correspondent making the application  
Number 42, Denver Road, Johannesburg (pls ignore this is a test submission for the manual)
- 3 State the name(s) of the insured(s)  
Tom Jones Aerflot (pls ignore this is a test submission for the manual)
- 4 Describe the business of the insured(s)  
Aviation (pls ignore this is a test submission for the manual)
- 5 Describe the cover required, the structure of the cover and the major differences to the cover offered  
by the South African market and attach supporting documents, if any.

**Political Risk; Aviation; Engineering; War; Cargo; Sabotage**

no one in south africa offers this cover (pls ignore this is a test submission for the manual)

[Information to support cover requirements](#)

Indicate the proposed start date for the insurance  
23/01/2009

Indicate the proposed end date for the insurance  
20/05/2011

- 6 If the proposed period of cover is longer than 1 year, please explain the motivation  
We need a long term cover because of factor X and Y. (pls ignore this is a test submission for the manual)



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1. Under achieves you will find submissions that are no longer active. Submission will be moved to achieve after some tim. You can view old submission by clicking on them.







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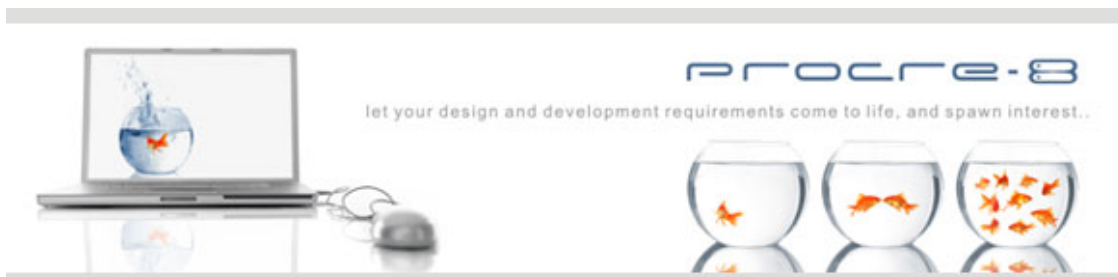


## Manage your Profile

**Introduction:** This section enables you to manage your profile such as your username, password and more.

Illustrated below is the step by step process:

1. Under my profile you can update your details such as user name, email address, username and password.





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\* Name

Joe Slow

\* Email address

email@email.com

\* Username

JoeSlow

Leave these fields blank to keep your current password

Password

.....

If changing your password, please confirm your new password

.....

[submit](#)

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