Lesson 11   Users and Groups

11.1   Investigate users and groups

Activity

1. **Log in as Superuser with su/gw and go to the Administration tab**

2. **Find the following users and answer the questions**

    Ben White and **Bruce Baker**

    a) What Role(s) does the user have?

    b) What Groups does the user belong to?

    c) List the Producer Codes assigned to this user (either directly or indirectly).

3. **Find the following Groups and answer the questions**

    a) Sacramento Branch and Security Group Baker

    b) What is the Organization of the group?

    c) Who are the Users in the group?

    d) List the Producer Code(s) assigned to the users in the group directly.

    e) List the Producer Code(s) that can be assigned to the users in the group as additional code(s).

11.2   Add a group and users

Activity

The insurer is opening a new branch in San Diego under the Western Region group. They need to add users to the group.

1. **Create a new group named "San Diego BranchXX"**

    a) Select an appropriate Type (Branch Office) and a Security Zone (Western Region).

2. **Add the following users to the new group**

    Note: These users exist in your sample data and should be used in this lab.

    o   A manager (ssmith)

    o   A group member (aapplegate)

    o   A group member (bbaker)

Stop

11.3 Solutions

11.3.1 Investigate users and groups

Solution

1. **Log in as Superuser with su/gw and go to the Administration tab**

2. **Find the following users and answer the questions**

   Ben White

   a) What Role(s) does the user have?

   On the Roles tab: Producer

   b) What Groups does the user belong to?

   On the Access tab:

   - *Business Production Offices – U.S.*
   - *Sacramento Branch*

   c) List the Producer Codes that are assigned to this user (either directly or indirectly).

   On the Access tab:

   - *QA1PRODUCERCODE01*
   - *Standard Code*
   - *INT-4 (Additional Producer Code)*

   Bruce Baker

   a) What Role(s) does the user have?

   On the Roles tab: Underwriter

   b) What Groups does the user belong to?

   On the Access tab:

   - *Los Angeles Branch UW*

- *Eastern Region Underwriting*

c) List the Producer Codes assigned to this user (either directly or indirectly).

On the Access tab: No producer codes

3. **Find the following Groups and answer the questions.**

Sacramento Branch

a) What is the Organization of the group?

Enigma Fire & Casualty

b) Who are the Users in the group?

Amy White, Ben White and Super Visor

c) List the Producer Code(s) assigned to the users in the group directly.

None

d) List the Producer Code(s) that can be assigned to the users in the group as additional code(s).

None

Security Group Baker

a) What is the Organization of the group?

Security Group

b) Who are the Users in the group?

Danny Hayes, Betty Secure

c) List the Producer Code(s) assigned to the users in the group directly.

503-002570

d) List the Producer Code(s) that can be assigned to the users in the group as additional code(s).

501-002570

502-002570

11.3.2 Add a group and users

Solution

The insurer is opening a new branch in San Diego under the Western Region group. They need to add users to the group.

1. **Create a new group named "San Diego BranchXX" by clicking Administration -> Actions -> New Group**

   a) Select an appropriate Type (such as Branch Office) and a Security Zone (such as Western Region)

   Note: Security zone limits an internal user's access to users, groups, organizations and producer codes. An internal user can only search and view those in the same security zone.

   b) Click update to save

2. **Add the following users to the new group**

   a) Go to the Users tab

   b) Click Edit and then Add

   Note: These users exist in your sample data and should be used in this lab.

   - A manager (ssmith)
   - A group member (aapplegate)
   - A group member (bbaker)

c) Click Update to save

11.4 Reference

11.4.1 Common actions to manage community model

Reference

Superuser or useradmin privileges are needed to manage producer codes, users, groups and organizations on the Administration tab.

Searching

To search for a producer code, user, group or an organization, go to **Administration → Users & Security** and then the corresponding search page. After searching, the results are displayed as links, so the user can click to view the entity details.

Creating new

To create a new producer code, user, group or an organization, go to the Administration tab and click on the corresponding Actions menu. Enter the desired information for each entity.

11.4.2 Managing users

Reference

Users

1. **The Basics card lists information about the user regarding:**

- Internal or external users – Whether the user is an internal employee or external agent. External agents act as intermediaries between clients purchasing a policy and an insurer.

- User type is only used by the assignment logic to determine whether certain activities can be routed to this user – Internal user types: Other (default) and Underwriter. External user types: Producer (default), Producer Assistant, and Auditor. User types besides Other have additional associated data fields. An Underwriter has related agencies and a Producer Assistant has associated Producers field.

- Organization is displayed in the case of an external user such as a producer. However, it is not displayed for Alice Applegate in the example above since she is an Underwriter.

- Locked – the user account is locked.

- Contact Information – employee id, primary phone, work phone, fax and email.

2. **The Attributes tab can be used to associate custom attributes with the user which the system can use when making assignment decisions**

Custom user attributes are defined via **Administration → Users & Security → Attributes**. Type is a way to group custom user attributes. Each custom user attribute has a name, a type, and a description. In the base application, the possible types are Default, Expertise, Language, Line of business and Named account (granted to users who have experience with a given account). The type of attributes can be changed by modifying the UserAttributeType typelist.

3. **The Access tab has sub sections**

- The **Groups** section lists which groups the user belongs to, if the user is a member, whether the user has Manager Privileges, load factor permissions and the load factor within that group. Load factors are useful for activity assignment using assignment rules.

- If Use Producer Code security is Yes, other sections will be seen on the access tab.

- **Producer Codes** from Groups section

  - Users automatically receive all the producer codes assigned to their groups. A user can create collections of permissions as roles and attach them to producer codes. The producer codes can then be assigned to users, policies or accounts.

  - Users having the **Producer Code Security** set to **Yes** can only use their role permissions against policies that have a producer code matching one of their own producer codes. Only the permissions assigned to the matching producer code can be used against that policy, even if the user has a larger set of permissions available through other user roles. To perform a particular action, the permission controlling that action must be present in both the producer code roles and the users assigned roles. What someone can do is represented by the intersection of the producer code's permissions and the user's permissions.

- Additional Producer Codes section

  - Users can add producer codes through this option. External producer users can have producer codes from their own organization/groups added only to them. However, internal users who have their producer code security turned on can have producer codes from any organization added.

  - Insurance insurers often sell their products through a network of insurance agents or "producers". Producer code security allows insurers to control access to sensitive policy and account information so that a given producer can only see information related to their specific business book. This control can extend to individual agents inside a producer organization, so Agent "A" cannot see Agent "B"'s business book even though they work for the same Agency.

4. **Assign roles to a user using the Roles tab**

5. **The Profiles tab displays the basic information about the user, e.g., employee id, address, city, state, phone numbers, etc**

6. **The Regions tab is used to add the geographic area that group covers. The regions are not inherited by child groups. They are typically used in assignment rules.**

   o Regions can be defined by counties, states, zip codes, etc.

   o To define a new region:

   a) Click **Regions** on the side bar

   b) Click Add Region

   c) Give your region a unique name and select its type (county, state, or zip code)

   d) Add counties, states or zip codes to your region definition and save

7. **The UW Authority tab lists the Underwriting Authority profiles used to approve underwriting issues. This is discussed in detail in the Underwriting Authority lesson.**

11.4.3   Managing groups

Reference

Groups

- The **Basics** tab contains the group name, parent group, organization information, security zone, etc.

- The **Users** tab lists the users belonging to this group. Users can be added and removed through this tab.

- The **Producer Codes** tab lists all producer codes available to the parent group which can be made available to the current group. All users in this group can use the producer codes available to the group, however, this is not implicit. A user must be granted access to producer codes and groups through the **Access** tab on the user.

- The **Queues** tab lists the queues used for activity assignment. Queues are visible to child groups. A queue is a repository associated with a group which contains activities that have been assigned to the group but have not yet been assigned to any user within that group. Users within the group can take ownership of activities in the queue. Unlike groups and users which can own any type of assignable object, queues can contain only activities. Users can view activities in accessible queues by clicking the **Queues** page link on the Desktop tab.

- The **Regions** tab lists the regions that the system uses for making assignment decisions.

Stop