Lesson 6 Controlling Access to BillingCenter

6.1 Prerequisites

For this exercise you will use two supported browsers:

- In the first browser (**SU browser**) go to the BillingCenter URL
  - Username: su
  - Password: gw
- In the second browser (**2nd browser**) go to the BillingCenter URL,
  You will login as different users as per the directions in the exercise.
- Unless otherwise stated, instructions refer to the **SU browser**

6.2 Exercise: Explore Security Dictionary, permissions, roles, and security zones

Activity

In this exercise, you investigate the **Security Dictionary** and then explore the capabilities for certain users and roles to better understand these functions of BillingCenter. You also create a new role, assign users to that role, and test the role. Then you add a policy to a security zone to observe security zone behavior for different users.

1. **Using the Security Dictionary, determine for each of these behaviors which permission grants the ability to perform the behavior and which roles contain the permission.**
   a) Access the **Account Disbursement** wizard. **Tip:** Go to the **Pages** section of the **Security Dictionary**.
   b) View billing plans. **Tip:** Go to the **System Permissions** section of the **Security Dictionary**.
2. **In BillingCenter, which users have no roles?**
3. **The underwriting department manager wants to restrict the ability to override commission rates to only certain underwriters. Implement this request by doing the following:**
   a) Create a new role (**Commission Overrider XX**) that has two permissions that control the ability to override commissions and one permission to edit producer information.
   b) **WAIT**: The instructor will remove the two commission override permissions from the Underwriter role.
   c) Search for users with the **Underwriter** role.
   d) Add the role of **Commission Overrider** to **Eleanor PhelanXX**. Notice Eleanor also has the role of Underwriter.

4. **To test the new role:**
   a) In the 2nd browser login as studentXX/gw
   b) Open the Crow Auto Repair XX account.
   c) Add a policy with these details to the account:
      - Policy #: GL01-CAUTO-XX
      - Product: General Liability
      - Payment Plan: PP08
      - Primary Producer: Baker & Associates
      - Charge: Premium for 1399
   d) In the **2nd browser** log in as Chris Clark (**cclark/gw**), who is an underwriter but does not have the **Commission Overrider XX** role.
   e) Search for the **GL01-CAUTO-XX** policy
   f) Go to the **Commissions** screen for the policy. Can Chris override the commission plan?
   g) In the **2nd browser** log out and log in as **Eleanor PhelanXX**, the underwriter who also has the Commission Overrider role.
   h) Go to the **Commissions** screen for the GL01-CAUTO-**XX** policy. Change the commission percentage rate to **11%**.
   If that succeeds, change the commission plan. Both actions should succeed for this user.
5. **In the SU browser go to the Commercial Lines group.**
   a) What security zone is the Commercial Lines group a member of?
   b) What users are in the group?
6. **Follow these steps to observe security zone behavior:**
   a) Add the **GL01-CAUTO-XX** policy you created earlier in this exercise to the **Commercial Lines Zone**.
   b) In the **SU browser,** can you still see the policy? Why or why not?
   c) In the 2nd browser, log in as EPHELANXX.
   d) What happens when Eleanor searches for the GL01-CAUTO-**XX** policy?
   e) Why can't she find the policy?
   f) Log out and log in as **ELEE**. Can Edward see the policy? Why or why not?
   g) Indicate to the Instructor that you have completed the exercise (6.1.6)

6.3 Solution

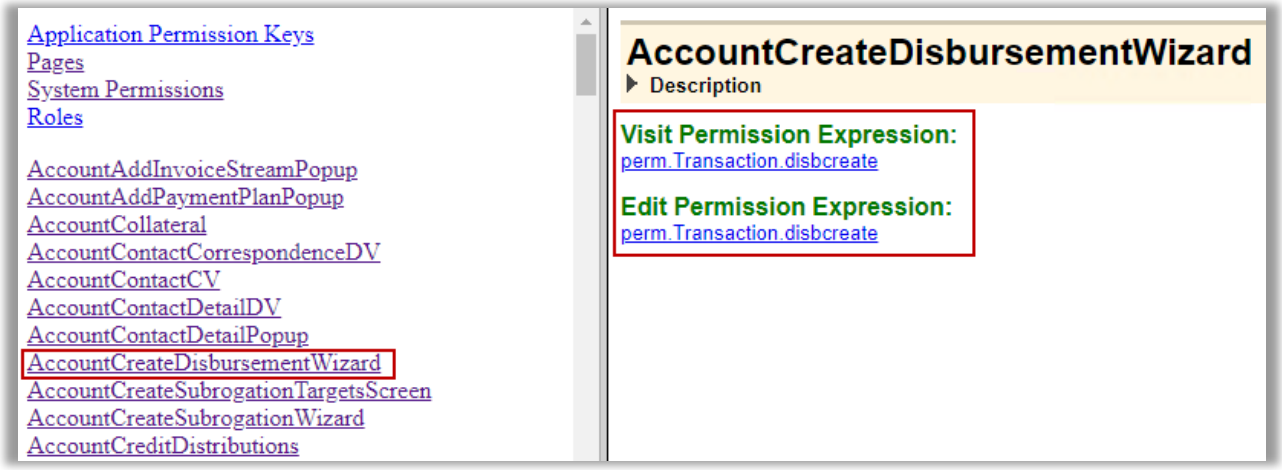
Solution

In this exercise, you investigate the **Security Dictionary** and then explore the capabilities for certain users and roles to better understand these functions of BillingCenter. You also create a new role, assign users to that role, and test the role. Then you add a policy to a security zone to observe security zone behavior for different users.

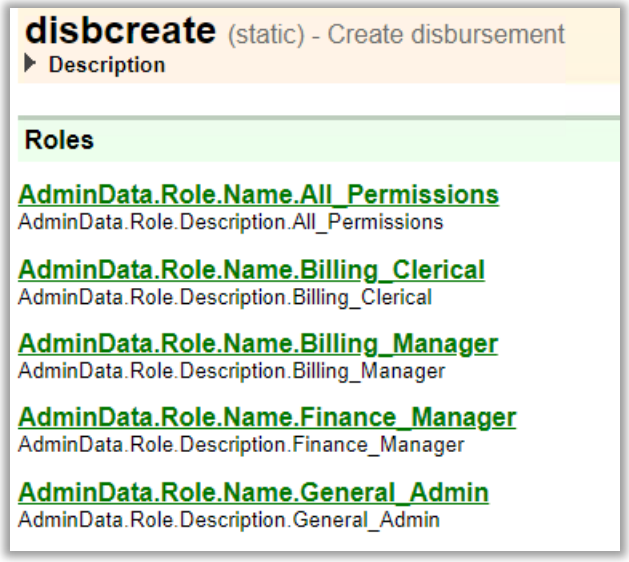
1. **Using the Security Dictionary, determine for each of these behaviors which permission grants the ability to perform the behavior and which roles contain the permission.**

   a) Access the **Account Disbursement** wizard. **Tip:** Go to the **Pages** section of the **Security Dictionary**.

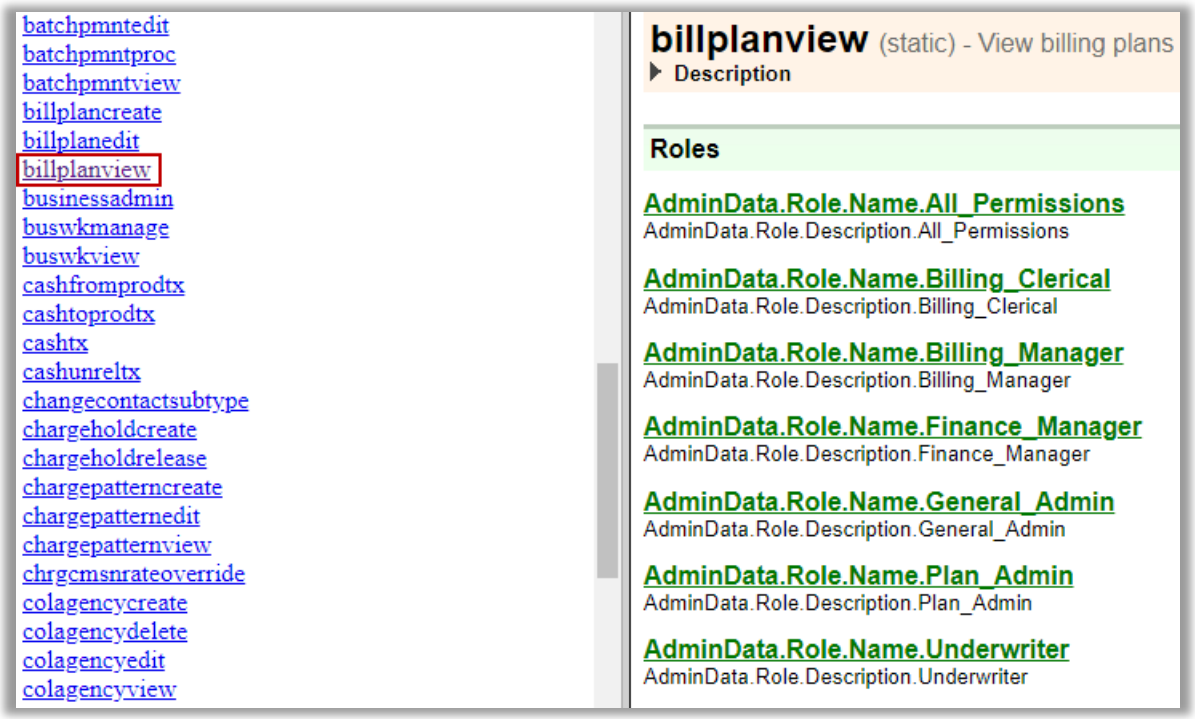
   *In the **Security Dictionary**, click **Pages** in the side pane. Click **AccountCreateDisbursementWizard** to see the permissions for the **Account Disbursement Wizard** screen:*



   To find the roles that contain each permission, click the permission.
   For the disbcreate permission:

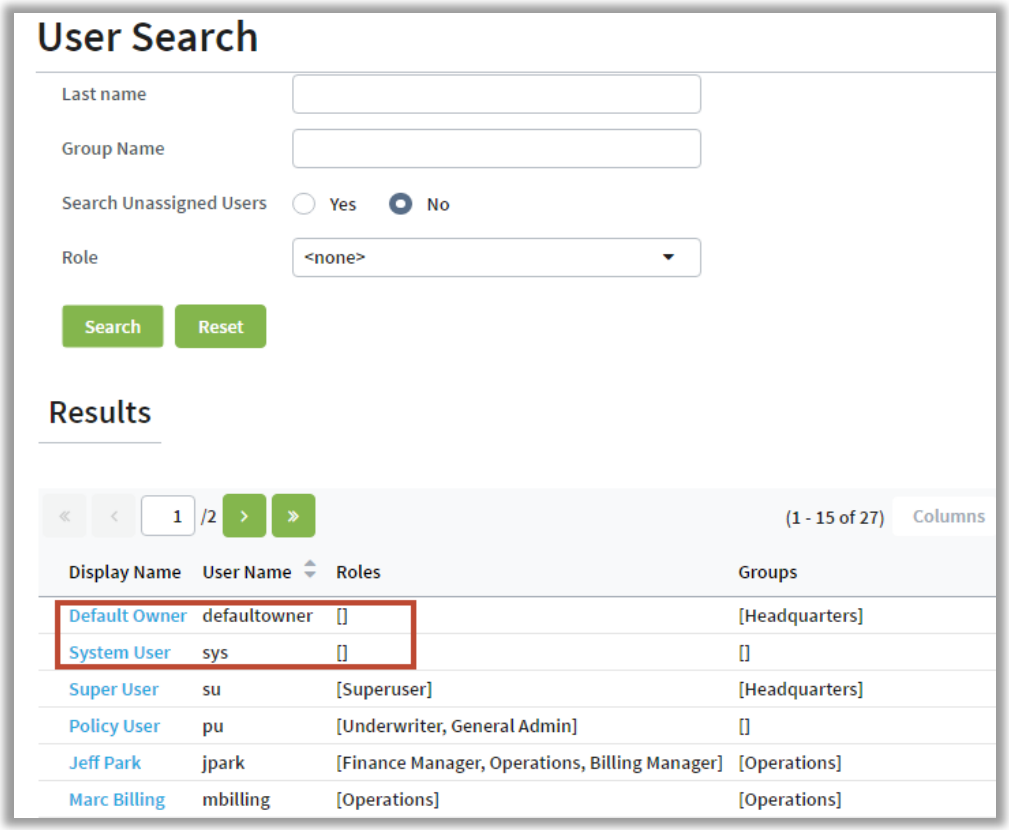


b) View billing plans. **Tip:** Go to the **System Permissions** section of the **Security Dictionary**.
Click System Permissions in the side panel at the top left. Scroll to billplanview and click the link:



2. **In the BillingCenter, which users have no roles?**
Defaultowner and sys. In the BillingCenter UI, select Administration → Users & Security →

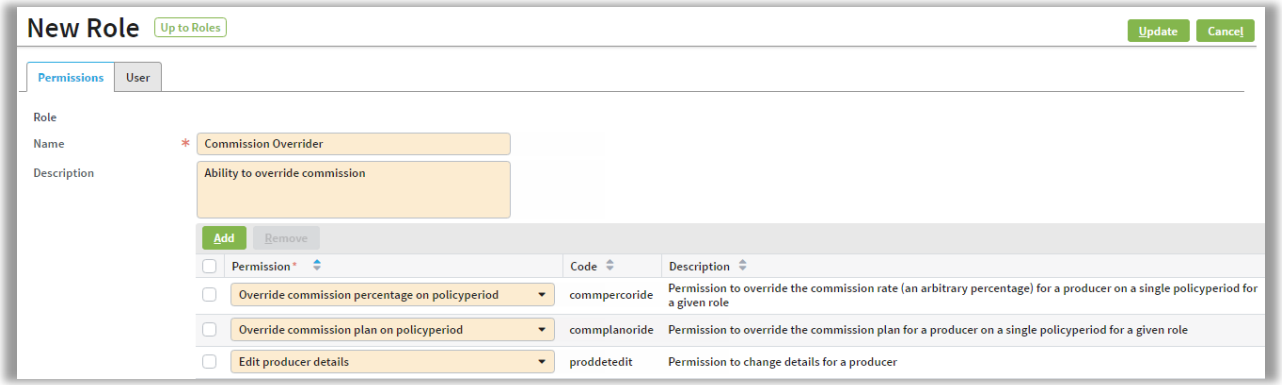
Users. Click Search.



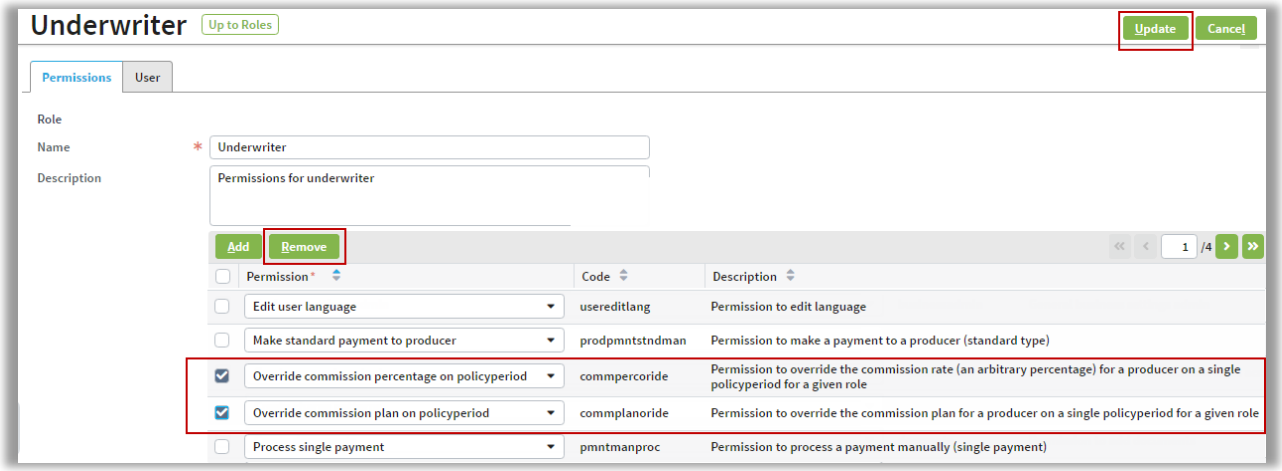
3. **The underwriting department manager wants to restrict the ability to override commission rates to only certain underwriters. Implement this request by doing the following:**

   a) Create a new role (**Commission Overrider <u>XX</u>**) that has two permissions that control the ability to override commissions and one permission to edit producer information.

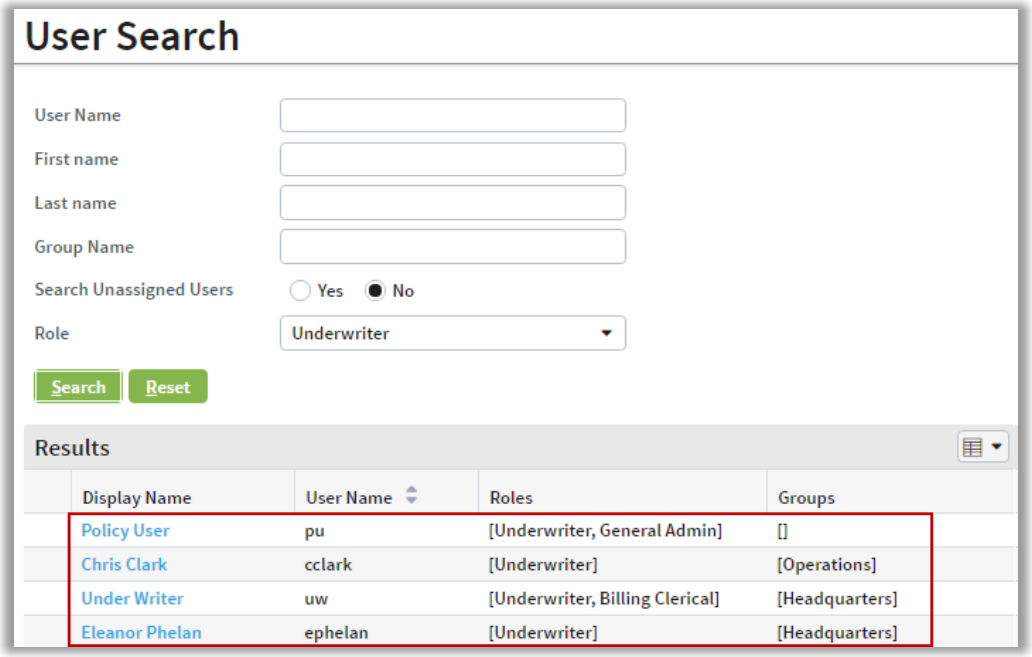
   Administration → Users & Security → Roles → New Role



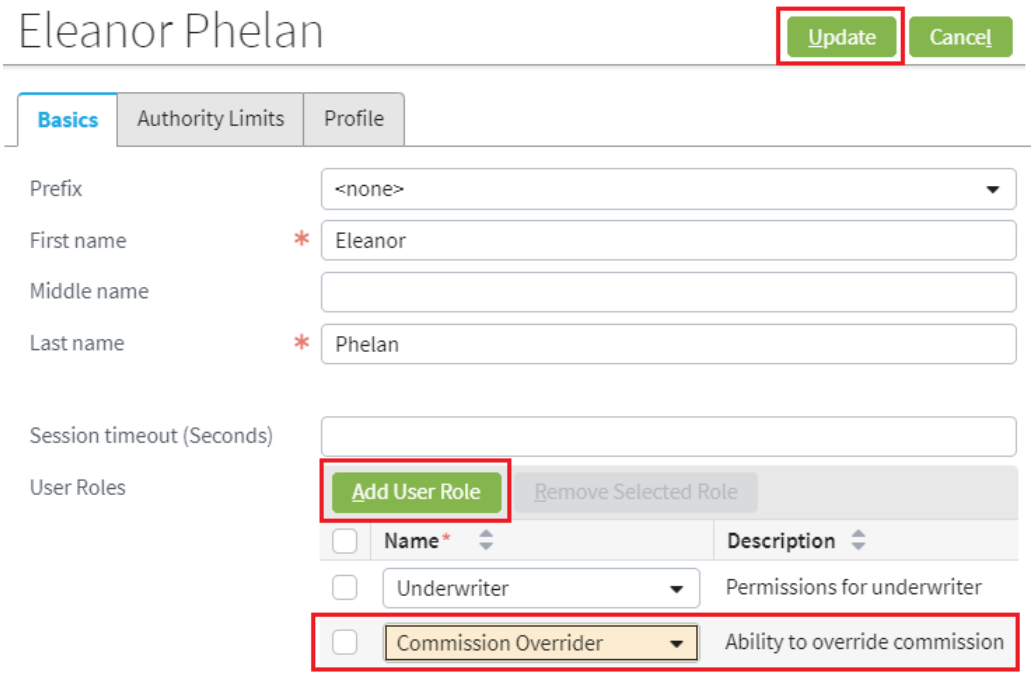
b) **WAIT**: The instructor will remove the two commission override permissions from the **Underwriter** role.
*Click the **Underwriter** link on second page. Click **Edit**. Select "Override commission percentage on policyperiod" and "Override commission plan on policyperiod". Click **Remove**. Click **Update**.*



c) Search for users with the Underwriter role. ***Administration → Users & Security → Users***. *Select **Underwriter** as the **Role** and click **Search**.*



d) Add the role of **Commission Overrider** to **Eleanor PhelanXX**.
Click **Eleanor PhelanXX**. *Click **Edit**. Click **Add User Role**. Select **Commission Overrider XX** as the Name. Click **Update**.* Notice Chris Clark also has the role of Underwriter.



4. To test the new role:

a) In the **2nd browser** login as **student<u>XX</u>**/gw

b) Open the Crow Auto Repair <u>XX</u> account.

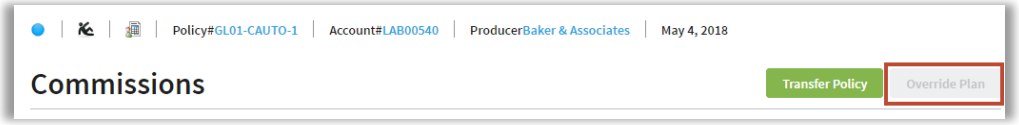
c) Add a policy with these details to the account:

- Policy #: GL01-CAUTO-<u>XX</u>
- Product: General Liability
- Payment Plan: PP08
- Primary Producer: Baker & Associates
- Charge: Premium for 1399

d) In the **2nd browser** log in as **Chris Clark (cclark/gw)**, who is an underwriter but does not have the Commission Overrider role.

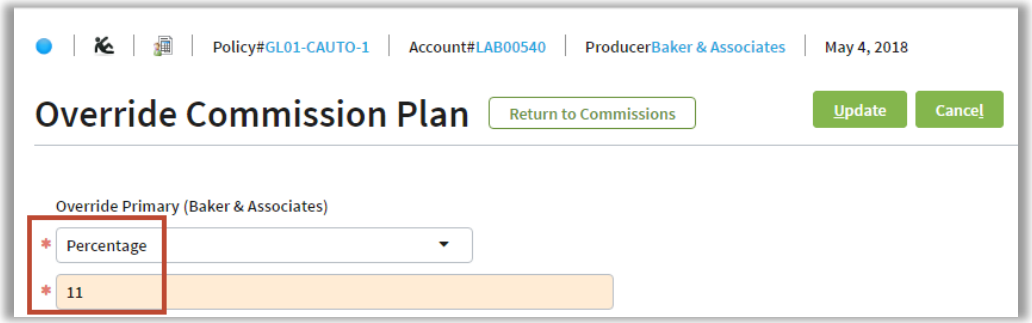
e) Search for the **GL01-CAUTO-<u>XX</u>** policy

f) Go to the **Commissions** screen for the policy. Can Chris override the commission plan? *No. The **Override Plan** button is not enabled.*

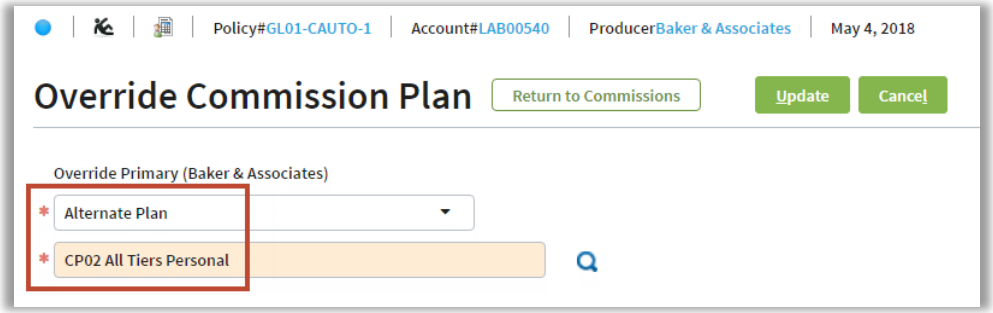


g) In the **2nd browser** log out and log in as **Eleanor Phelan<u>XX</u>**, the underwriter who also has the Commission Overrider role.

h) Go to the **Commissions** screen for the GL01-CAUTO-**<u>XX</u>** policy. Change the commission percentage rate to 11%. *On the **Commissions** screen, click **Override Plan**. Select **Percentage** from the **Override Primary** drop-down list and enter **11**. Click **Update**.*



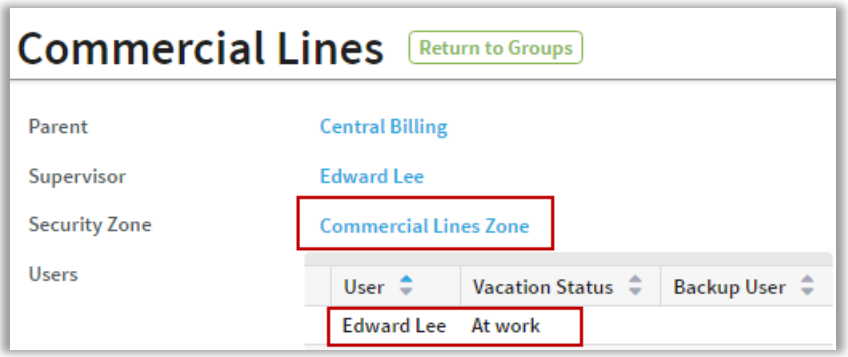
If that succeeds, change the commission plan. Both actions should succeed for this user. *On the **Commissions** screen, click **Override Plan**. Select **Alternate Plan** from the **Override Primary** drop-down list. Search for and select a commission plan. Click **Update**.*



5. **In the SU browser, go to the Commercial Lines group.**
   Administration → Users & Security → Groups. Click Commercial Lines.

   a) What security zone is the Commercial Lines group a member of? *Commercial Lines Zone*

   b) What users are in the group? *Edward Lee*



6. **Follow these steps to observe security zone behavior:**

   a) Add the **GL01-CAUTO-XX** policy you created earlier in this exercise to the Commercial Lines Zone. *On the **Policy Details** screen, click **Edit**, select **Commercial Lines Zone** as the **Security Zone** and click **Update**.*

b) In the **SU browser** can you still see the policy? *Yes.* Why or why not? *Superuser role has permission to ignore security zones.*

c) In the **2nd browser,** log out and log in as **EPHELAN<u>XX</u>**.

d) What happens when Eleanor searches for the GL01-CAUTO-**XX** policy? *A message is displayed saying "The search returned zero results."*

e) Why can't she find the policy? *Eleanor does not belong to a group in the Commercial Lines Zone.*

f) Log out and log in as **ELEE**. Can Edward see the policy? *Yes.* Why or why not? *Edward is a member of the Commercial Lines group, which is a member of the Commercial Lines Zone.*