

# Lesson 8 Permissions and Access Control Lists

## Prerequisites

For this exercise, you will use ClaimCenter and a supported web browser.

ClaimCenter Server and Contact Manager should be running when you start the exercise.

The default URL for ClaimCenter is <http://localhost:8080/cc/ClaimCenter.do>.

## 8.1 Exercise: Managing permissions and roles



### Activity

In this exercise, you observe the effects of permissions.

Succeed Insurance wants to control activity on closed claims more tightly. Adjusters should have the ability to create notes on a closed claim, but they should not be able to create documents or activities on a closed claim.

1. **Log in to ClaimCenter as a system administrator (su/gw). Remove the following permissions from the Adjuster role (if they have not already been removed):**
  - Create activities on closed claims (on page 1 of the list)
  - Create documents on closed claims (on page 1 of the list)
2. **Log in to ClaimCenter as useradmin/gw (Ursula Seradmin, a ClaimCenter user administrator).**
3. **Create a new role as follows:**

Name: Closed Claims XX

Description: Permissions to create activities and documents on closed claims

Permissions: include...

**Create activities on closed claim**

**Create documents on closed claim**

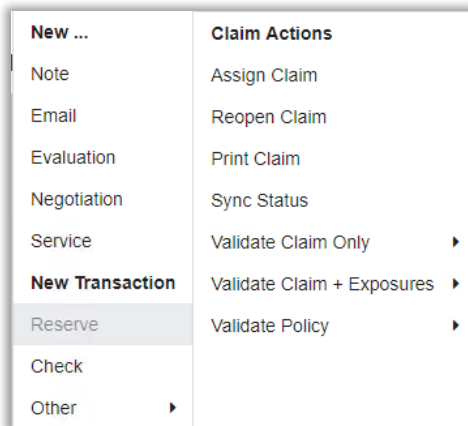
4. **Modify the coworkerXX user account so that this user has the permission. Do not extend the permission to studentXX. You can complete this step by using one of the two approaches below:**

Search for a user, select the user, and modify the Roles list view, OR

Go to the Roles screen, select the role, navigate to the User tab, and add the user.

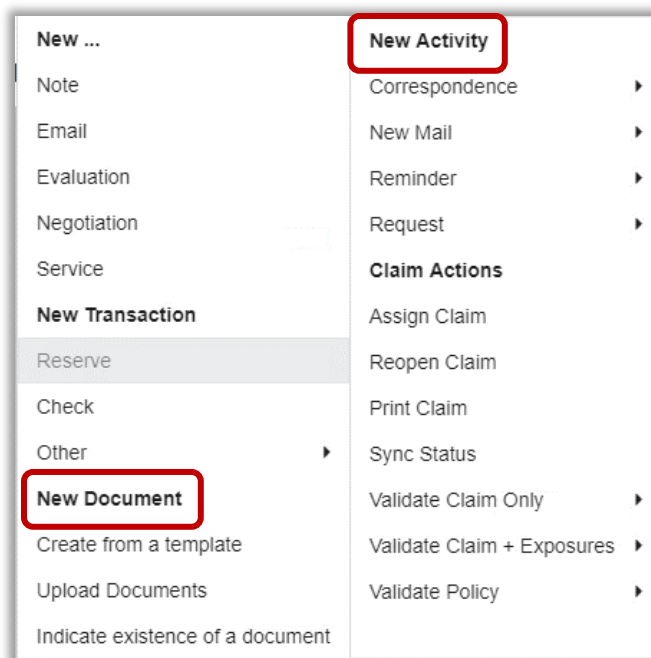
5. **As studentXX, log in to ClaimCenter and access the Bill Kinman closed claim (235-53-425888).**

6. Verify that studentXX cannot create a document or activity on the claim:



7. As coworkerXX, log in to ClaimCenter and access the Bill Kinman closed claim (235-53-425888).

8. Verify that coworkerXX can create a document or activity on the claim.



9. Log out of ClaimCenter.

## 8.2 Exercise: Access Control Lists



Activity

In this exercise, you observe how Access Control Lists can change the visibility of a given claim for a given set of users. Remember that the access profiles for the exercise are default or base application settings.

**1. As coworkerXX, create a claim using the Auto - Quick Claim wizard.**

- a) Search for the policy of Kevin SmithXX.
- b) In creating the claim, specify the minimal information acceptable.
- c) Assign the claim to coworkerXX (Cory OworkerXX, a claims adjuster).
- d) Open the claim.
- e) Go to the Claim Status menu link (Summary → Status) and verify that the Special Claim Permission field is blank. (This means it's an "unsecured" claim.)

General Status	
Loss Type	Auto
Line of Business	Personal Auto Line
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No
<hr/>	
Claim Status	Open
Date Reported	12/22/2016 10:52 AM
Create Date	12/22/2016
Days Open	0
<hr/>	
Primary Adjuster	Cory Worker01
Primary Group	Training Group 01
Special Claim Permission	

In this part of the exercise, you log in as each of the following users to see how Access Control Lists can change the visibility of a given claim for a given set of users.

- **Sam TudentXX** (studentXX), who is in the same group as coworkerXX
- **Andy Applegate** (aapplegate), who is in the same security zone as coworkerXX
- **Gerald Ickes** (gickes), who is in a different security zone than coworkerXX

Remember, Cory OworkerXX (coworkerXX) is the claim owner for this exercise.

**Make a note of the newly created claim number.**

2. **Log in as the other three users to see if you can view the claim. NOTE: When you log in as studentXX, be sure to use the same number. For example, if you logged on first as coworker07, you should log in as student07 for this step.**
3. **Can studentXX (same group and therefore same security zone) see the claim?**

4. Can aapplegate (different group, same security zone) see the claim?
5. Can gickes (different security zone) see the claim?
6. As coworkerXX, set the claim's Special Claim Permissions field to "Employee claim" and set CiQ to "No". An employee claim should be visible only to users in the owner's group. As the other three users, see if you can view the claim now.
7. Can studentXX (same group) see the claim?
8. Can aapplegate (different group, same security zone) see the claim?
9. Can gickes (different security zone) see the claim?

## 8.3 Solution: Access Control Lists



### Solution

1. **As coworkerXX, create a claim using the Auto - Quick Claim wizard.**
  - a) Search for the policy of Kevin SmithXX.
  - b) In creating the claim, specify the minimal information acceptable.
  - c) Assign the claim to coworkerXX (Cory OworkerXX, a claims adjuster).
  - d) Open the claim.
  - e) Go to the Claim Status menu link (Summary → Status) and verify that the Special Claim Permission field is blank. (This means it's an "unsecured" claim.)

General Status	
Loss Type	Auto
Line of Business	Personal Auto Line
Claim Segment	Auto - low complexity
Claim Strategy	Unknown
Incident Only?	No
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Date Reported	12/22/2016 10:52 AM
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Primary Adjuster	Cory Worker01
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In this part of the exercise, you log in as each of the following users to see how Access Control Lists can change the visibility of a given claim for a given set of users.

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- **Andy Applegate** (aapplegate), who is in the same security zone as coworkerXX
- **Gerald Ickes** (gickes), who is in a different security zone than coworkerXX

Remember, Cory WorkerXX (coworkerXX) is the claim owner for this exercise.

**Make a note of the newly created claim number.**

2. **Log in as the other three users to see if you can view the claim. NOTE: When you log in as studentXX, be sure to use the same number. For example, if you logged in first as coworker07, you should log in as student07 for this step.**
3. **Can studentXX (same group and therefore same security zone) see the claim?**  
Yes
4. **Can aapplegate (different group, same security zone) see the claim?**  
Yes
5. **Can gickes (different security zone) see the claim?**  
No
6. **As coworkerXX, set the claim's Special Claim Permissions field to "Employee claim" and set CiQ to "No". An employee claim should be visible only to users in the owner's group. As the other three users, see if you can view the claim now.**
7. **Can studentXX (same group) see the claim?**  
Yes

**8. Can aaggregate (different group, same security zone) see the claim?**

No

**9. Can gickes (different security zone) see the claim?**

No

