

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



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:*

The screenshot shows the 'Pages' section of the Security Dictionary. On the left, a sidebar lists categories: Application Permission Keys, Pages, System Permissions, and Roles. Under 'Pages', a list of items includes: AccountAddInvoiceStreamPopup, AccountAddPaymentPlanPopup, AccountCollateral, AccountContactCorrespondenceDV, AccountContactCV, AccountContactDetailDV, AccountContactDetailPopup, AccountCreateDisbursementWizard (which is highlighted with a red border), AccountCreateSubrogationTargetsScreen, AccountCreateSubrogationWizard, and AccountCreditDistributions. To the right, the main content area is titled 'AccountCreateDisbursementWizard'. It contains a 'Description' section and two buttons: 'Visit Permission Expression:' with the value 'perm.Transaction.disbcreate' and 'Edit Permission Expression:' with the same value.

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

The screenshot shows the details for the 'disbcreate' permission. The title is 'disbcreate (static) - Create disbursement'. Below it is a 'Description' link. The main content area is titled 'Roles' and lists several roles: AdminData.Role.Name.All_Permissions, AdminData.Role.Name.Billing_Clerical, AdminData.Role.Name.Billing_Manager, AdminData.Role.Name.Finance_Manager, and AdminData.Role.Name.General_Admin. Each role entry includes its description: All_Permissions, Billing_Clerical, Billing_Manager, Finance_Manager, and General_Admin respectively.

- 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:

[batchpmntedit](#)
[batchpmntproc](#)
[batchpmntview](#)
[billplancreate](#)
[billplanedit](#)
[billplanview](#) **►**
[businessadmin](#)
[buswkmanage](#)
[buswkview](#)
[cashfromprodtx](#)
[cashtoprodtx](#)
[cashtx](#)
[cashunreltx](#)
[changecontactsubtype](#)
[chargeholdcreate](#)
[chargeholdrelease](#)
[chargepatterncreate](#)
[chargepatternedit](#)
[chargepatternview](#)
[chrgcmsnrateoverride](#)
[colagencycreate](#)
[colagencydelete](#)
[colagencyedit](#)
[colagencyview](#)

billplanview (static) - View billing plans ► Description
Roles
AdminData.Role.Name.All_Permissions AdminData.Role.Description.All_Permissions
AdminData.Role.Name.Billing_Clerical AdminData.Role.Description.Billing_Clerical
AdminData.Role.Name.Billing_Manager AdminData.Role.Description.Billing_Manager
AdminData.Role.Name.Finance_Manager AdminData.Role.Description.Finance_Manager
AdminData.Role.Name.General_Admin AdminData.Role.Description.General_Admin
AdminData.Role.Name.Plan_Admin AdminData.Role.Description.Plan_Admin
AdminData.Role.Name.Underwriter AdminData.Role.Description.Underwriter

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

Users. Click Search.

User Search

Last name

Group Name

Search Unassigned Users Yes No

Role

Results

Display Name User Name Roles Groups

Default Owner	defaultowner	[]	[Headquarters]
System User	sys	[]	[]
Super User	su	[Superuser]	[Headquarters]
Policy User	pu	[Underwriter, General Admin]	[]
Jeff Park	jpark	[Finance Manager, Operations, Billing Manager]	[Operations]
Marc Billing	mbilling	[Operations]	[Operations]

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.

Administration → Users & Security → Roles → New Role

New Role [Up to Roles](#)

[Permissions](#) [User](#)

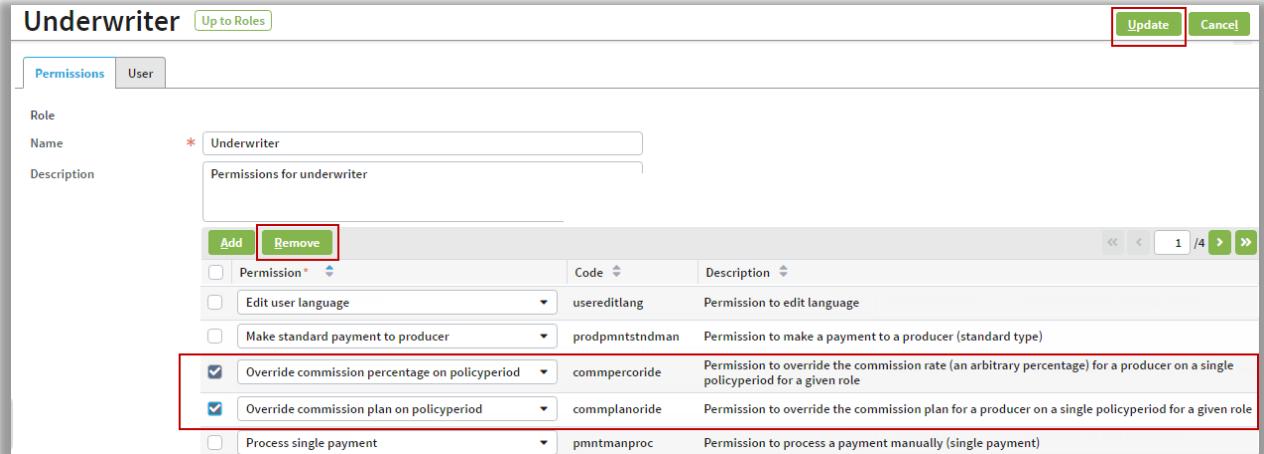
Role
Name *
Description

[Add](#) [Remove](#)

Permission *	Code	Description
<input type="checkbox"/> Override commission percentage on policyperiod	comppercoride	Permission to override the commission rate (an arbitrary percentage) for a producer on a single policyperiod for a given role
<input type="checkbox"/> Override commission plan on policyperiod	complanneride	Permission to override the commission plan for a producer on a single policyperiod for a given role
<input type="checkbox"/> Edit producer details	prodeditedit	Permission to change details for a producer

[Update](#) [Cancel](#)

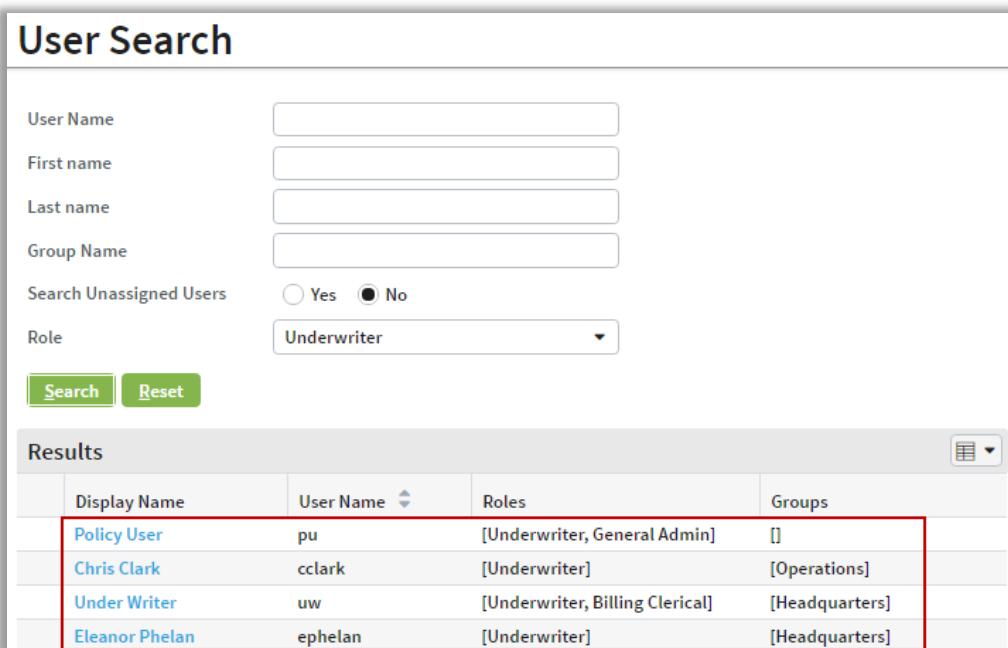
- b) **WAIT:** The instructor will remove the two commission override permissions from the **Underwriter** role.
*Click the **Underwriter** link on second page. Click **Edit**. Select “Override commission percentage on policyperiod” and “Override commission plan on policyperiod”. Click **Remove**. Click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



The screenshot shows the 'Underwriter' role edit screen. The 'Permissions' tab is selected. The 'Name' field contains 'Underwriter' and the 'Description' field contains 'Permissions for underwriter'. Below these fields are 'Add' and 'Remove' buttons. A table lists permissions with their codes and descriptions. Two specific permissions are highlighted with a red box: 'Override commission percentage on policyperiod' (code: commpercoride) and 'Override commission plan on policyperiod' (code: commplanoride). Both checkboxes are checked.

Permission*	Code	Description
Edit user language	usereditlang	Permission to edit language
Make standard payment to producer	prodpmntstdman	Permission to make a payment to a producer (standard type)
<input checked="" type="checkbox"/> Override commission percentage on policyperiod	commpercoride	Permission to override the commission rate (an arbitrary percentage) for a producer on a single policyperiod for a given role
<input checked="" type="checkbox"/> Override commission plan on policyperiod	commplanoride	Permission to override the commission plan for a producer on a single policyperiod for a given role
Process single payment	pmntmanproc	Permission to process a payment manually (single payment)

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



The screenshot shows the 'User Search' interface. It includes fields for 'User Name', 'First name', 'Last name', 'Group Name', 'Search Unassigned Users' (radio buttons for Yes and No), 'Role' (dropdown menu set to 'Underwriter'), and 'Search' and 'Reset' buttons. The 'Results' section displays a table of users. A red box highlights the entire results table. The table has columns for 'Display Name', 'User Name', 'Roles', and 'Groups'. The rows are: 'Policy User' (User Name: pu, Roles: [Underwriter, General Admin], Groups: []), 'Chris Clark' (User Name: cclark, Roles: [Underwriter], Groups: [Operations]), 'Under Writer' (User Name: uw, Roles: [Underwriter, Billing Clerical], Groups: [Headquarters]), and 'Eleanor Phelan' (User Name: ephelan, Roles: [Underwriter], Groups: [Headquarters]).

Display Name	User Name	Roles	Groups
Policy User	pu	[Underwriter, General Admin]	[]
Chris Clark	cclark	[Underwriter]	[Operations]
Under Writer	uw	[Underwriter, Billing Clerical]	[Headquarters]
Eleanor Phelan	ephelan	[Underwriter]	[Headquarters]

- 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.*

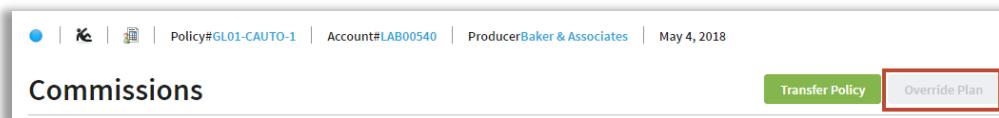
Eleanor Phelan

Update **Cancel**

Basics	Authority Limits	Profile						
Prefix	<none>							
First name	* Eleanor							
Middle name								
Last name	* Phelan							
Session timeout (Seconds)								
User Roles	<input type="button" value="Add User Role"/> <input type="button" value="Remove Selected Role"/> <table border="1"> <tr> <td><input type="checkbox"/> Name *</td> <td>Description</td> </tr> <tr> <td><input type="checkbox"/> Underwriter</td> <td>Permissions for underwriter</td> </tr> <tr> <td><input type="checkbox"/> Commission Overrider</td> <td>Ability to override commission</td> </tr> </table>		<input type="checkbox"/> Name *	Description	<input type="checkbox"/> Underwriter	Permissions for underwriter	<input type="checkbox"/> Commission Overrider	Ability to override commission
<input type="checkbox"/> Name *	Description							
<input type="checkbox"/> Underwriter	Permissions for underwriter							
<input type="checkbox"/> Commission Overrider	Ability to override commission							

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:
 - o Policy #: GL01-CAUTO-XX
 - o Product: General Liability
 - o Payment Plan: PP08
 - o Primary Producer: Baker & Associates
 - o 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-XX** 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 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%. *On the **Commissions** screen, click **Override Plan**. Select **Percentage** from the **Override Primary** drop-down list and enter 11. Click **Update**.*

The screenshot shows the 'Override Commission Plan' page. At the top, there are navigation icons and status information: Policy#GL01-CAUTO-1, Account#LAB00540, ProducerBaker & Associates, and May 4, 2018. Below this, the title 'Override Commission Plan' is displayed, along with 'Return to Commissions', 'Update', and 'Cancel' buttons. A section titled 'Override Primary (Baker & Associates)' contains a dropdown menu set to 'Percentage' with the value '11' highlighted.

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**.

The screenshot shows the 'Override Commission Plan' page. The interface is identical to the previous one, but the dropdown menu under 'Override Primary' is now set to 'Alternate Plan', with the value 'CP02 All Tiers Personal' highlighted.

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**

The screenshot shows the 'Commercial Lines' group details page. It displays the following information:

- Parent:** Central Billing
- Supervisor:** Edward Lee
- Security Zone:** Commercial Lines Zone (highlighted with a red box)
- Users:** Edward Lee (status: At work)

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 **EPHELANXX**.
- 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.*