

# Lesson 7 Configuring Permissions

ClaimCenter provides a base set of permissions which control access to the application's various functions. This functionality is configurable, allowing you to change the applicability of existing permissions and add new permissions to control access to new (or existing) functionality.

## 7.1 Limit ability to remove Metro Reports



### Exercise

At Succeed Insurance, only supervisors may remove metro reports from claims.

The base application allows all users to remove the reports. You need to make the appropriate configurations so that supervisors may remove metro reports from claims, but adjusters cannot.

### Prerequisites

This lesson assumes that you have successfully completed the **ClaimCenter Configuration Kickstart** course.

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

ClaimCenter Server should **not** be running when you start the exercise.

### Exercise 1: Limit ability to remove Metro Reports

1. Create a custom permission in typelist **SystemPermissionType.ttx** which will be used to control a user's ability to remove metro reports.

code	metrodel_Ext
name	Delete metro reports
desc	Permission to delete metro reports

2. Modify the user interface so that the Remove button at the top of the metro report is visible only to users with the new permission. (To save time, do this only for auto claims.)
3. Start ClaimCenter in debug mode.
4. Log in as admin/gw.
5. Add the new permission to the Claims Supervisor role.
6. Log out.

## Test procedure

1. Log in as aapplegate/gw.
2. Navigate to the Allen Robertson claim (235-53-365871).
3. In the sidebar, click Loss Details.
4. Click Edit.
5. Verify that the Remove button is not visible for the Metropolitan Reports table.
6. Click Cancel and log out.
7. Log in as ssmith/gw, Andy Applegate's supervisor.
8. Navigate to the Allen Robertson claim (235-53-365871).
9. Click Loss Details.
10. Click Edit.
11. Verify that the Remove button is visible for the Metropolitan Reports table.
12. Click Cancel and log out.

## 7.2 Bonus task



### Exercise

Regenerate the Security Dictionary *from the user interface* (not the command line) and view the permission you created.



### Stop

## 7.3 Solution

### Solution 1: Limit ability to remove Metro Reports

Name	Value
code	metrodel_Ext
name	Delete metro reports
desc	Permission to delete metro reports
identifierCode	
priority	-1
retired	false

LossDetailsDV.Auto.pcf x

### Metropolitan Reports

List View Input

Toolbar

{Term.Add.Proper} Remove

List View : MetroReportsLV Claim, documentsActionsHelper

Row Iterator MetroReport

{Term.Type.Proper} {Term.Status.Proper} Order Date Document Actions

Row

MetroReport...oReportType ▼ MetroReport.Status ▼ ./././... Link Cell MetroReport.Document.Name Link Cell : Acti... Resubmit

Iterator Buttons	
Basic properties	
addVisible	
id	
iterator*	MetroReportsLV.MetroReportsLV
removeVisible	perm.System.metrodel_Ext

Claims Supervisor
Up to Roles
Edit

Basics

Users

Role

Name

Claims Supervisor

Description

Base permissions for a claims supervisor

Claims Supervisor
Up to Roles

Name

Claims Supervisor

Description

Base permissions for a claims supervisor

Add
Remove

<input type="checkbox"/>	Close matters	mttrclose	Permission to close matters on a claim
<input type="checkbox"/>	Create activities	actcreate	Permission to create new activities
<input type="checkbox"/>	Create activities on closed claim	actcreateclsd	Permission to create a new activity associated with a closed claim
<input type="checkbox"/>	Delete address book preferred vendors	abcreate	Permission to create a new contact in the address book
<input type="checkbox"/>	Delete documents	bulkinvcreate	Permission to create bulk invoices
<input type="checkbox"/>	Delete documents on closed claim	claimcreate	Permission to create a new claim
<input type="checkbox"/>	Delete groups	anytagcreate	Permission to create a new contact regardless of which tag(s)
<input type="checkbox"/>	Delete medical note	doccreate	Permission to add documents
<input type="checkbox"/>	Delete metro reports	doccreateclsd	Permission to add documents to a closed claim
<input type="checkbox"/>	Delete organization	evalcreate	Permission to create an evaluation on a claim
<input type="checkbox"/>	Delete private note	expcreate	Permission to create a new exposure
<input type="checkbox"/>	Delete sensitive note	cttcreate	Permission to create a new local contact
<input type="checkbox"/>	Delete users	manpaycreate	Permission to create manual payment transactions
<input type="checkbox"/>	Deploy Activity Rule		
<input type="checkbox"/>	Deploy Exposure Rule		
<input type="checkbox"/>	Deploy Reserve Rule		
<input type="checkbox"/>	Deploy Rule		
<input type="checkbox"/>	Edit activity pattern		
<input type="checkbox"/>	Edit Activity Rule		
<input type="checkbox"/>	Edit address book preferred vendors		
<input type="checkbox"/>	Edit BatchProcess tools page		
<input type="checkbox"/>	Edit Cluster tools page		
<input type="checkbox"/>	Edit Exposure Rule		
<input type="checkbox"/>	<none>		

## Test procedure

# ClaimCenter™

Username

Password

[Log In](#)

Pol: 54-253465 | Ins: Allen Robertson | DoL: 01/13/2018 | St: Open | Adj: Andy Applegate (Auto1 - TeamA)

## Loss Details

Reported By [Ray Newton](#)

[Edit](#)

Metropolitan Reports					
<input type="checkbox"/>	Type	Status	Order Date	Document	Actions
<input type="checkbox"/>	Registration Check/DMV	Received		RegistrationCheckDMV3OCQYM0001.tif	<a href="#">Resubmit</a>
<input type="checkbox"/>	Auto Accident	Received		AutoAccident3OCQYM0000.tif	<a href="#">Resubmit</a>

# ClaimCenter™

Username

Password

[Log In](#)

Metropolitan Reports					
		<a href="#">Add</a>		<a href="#">Remove</a>	
<input type="checkbox"/>	Type ▾	Status ▾	Order Date ▾	Document	Actions
<input type="checkbox"/>	<a href="#">Registration Check/DMV</a>	Received		RegistrationCheckDMV3OCQYM0001.tif	<a href="#">Resubmit</a>
<input type="checkbox"/>	<a href="#">Auto Accident</a>	Received		AutoAccident3OCQYM0000.tif	<a href="#">Resubmit</a>

## Solution 2: Bonus task

<b>SI_metrodel</b> (static) - Delete metro reports	
► Description	
<b>Roles</b>	
<b><u>Claims Supervisor</u></b> Base permissions for a claims supervisor	
<b>Related Elements</b>	
<b><u>IteratorButtons</u></b> removeVisible attribute <a href="#">LossDetailsDV.Auto</a> (LossDetailsDV.Auto.pcf)	