Lesson 12
Organizations and Producer Codes

12.1 Investigate organizations

Activity

1. **Log in as Superuser with su/gw and go to the Administration tab**
2. **Explore the internal and external organizations and answer the questions**
   a) List all "**Fee audit company**" type organizations
   b) Find all of the external organizations whose name begins with "s".
   c) For organization **Security Group**:
      1) Who are the users in this agency?
      2) Which users have the User Admin role?
      3) List the producer codes available to members of the Security Group organization?
      4) What is the status of the producer codes?
3. **Log in as Danny Hayes (dhayes/gw). Can Danny search for other organizations or the internal organization?**

12.2 Producer code security

Activity

A bonus activity for producer code security.

1. **Log in as super user**
2. **Create a new external user, Betsy HartXX in the organization Allrisk Insurance**
   a) Enter the required details as needed and grant her the producer role
   b) Note the Username and Password for the new user
3. **Log out and log in as Carlos Hart**
4. **Create a new company account and a new submission**
   a) Any product will work for this exercise
   b) Note the account number and submission number
5. **Log out and log in as Betsy HartXX**
6. **Search for the account and submission created earlier**

a) Can Betsy access them? Why?

7. **Configure PolicyCenter so that Betsy HartXX can access the account and submission created by Carlos Hart**

Stop

12.3   Solutions

12.3.1   Investigate organizations

Solution

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

2. **Explore the internal and external organizations and answer the questions**

   Go to the Users & Security → Organizations page.

   a) List all "**Fee audit company**" type organizations.

      Careful Auditors

   b) Find all of the external organizations whose name begins with "s".

      Security Group, Special Form Property Brokers

      Note: Deselect the organization type in the previous search.

   c) For organization **Security Group**:
      1) Who are the users in this agency?

         Danny Hayes, Able Secure, Betty Secure

      2) Which users have the User Admin role?

         Danny Hayes, Able Secure and Betty Secure

      3) List the producer codes available to members of the Security Group organization?

         501-002570, 502-002570, 503-002570

      4) What is the status of the producer codes?

         Active

3. **Log in as Danny Hayes (dhayes/gw). Can Danny search for other organizations or the internal organization?**

   No. Organizations is not available under Users → Users & Security menu.

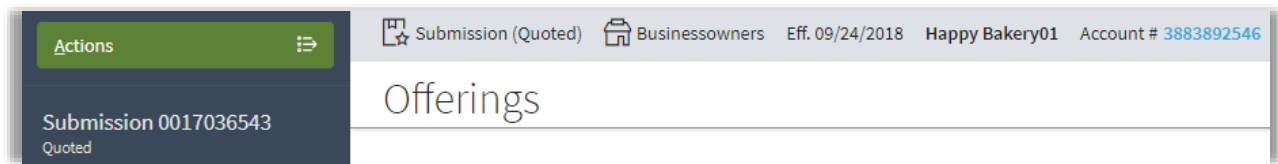## 12.3.2　Producer code security

💡 **Solution**

1. **Log in as super user**

2. **Create a new external user, Betsy HartXX in the organization Allrisk Insurance**

   a) Enter the required details as needed and grant her the producer role

      1) Actions → New User

         ▫ First name = Betsy

         ▫ Last name = HartXX (e.g., Hart01)

         ▫ Username = bhartXX (e.g., bhart01)

         ▫ Password = gw

         ▫ Active = Yes

         ▫ External user = Yes

         ▫ Search and select organization Allrisk Insurance

         ▫ Type = Producer

         ▫ Enter a phone number

         ▫ Go to Roles tab and add the Producer role

      2) Update the user. Ignore the warning message and click update again

   b) Note the Username and Password for the new user

3. **Log out and log in as Carlos Hart with chart/gw**

4. **Create a new company account and a new submission**

   a) Any product will work for this exercise.

      1) New Account → Company

         Example:

         Company Name= Happy BakeryXX (e.g., Happy Bakery01)

         Producer Code = 501-002552 Allrisk Insurance

      2) New Submission → Businessowners
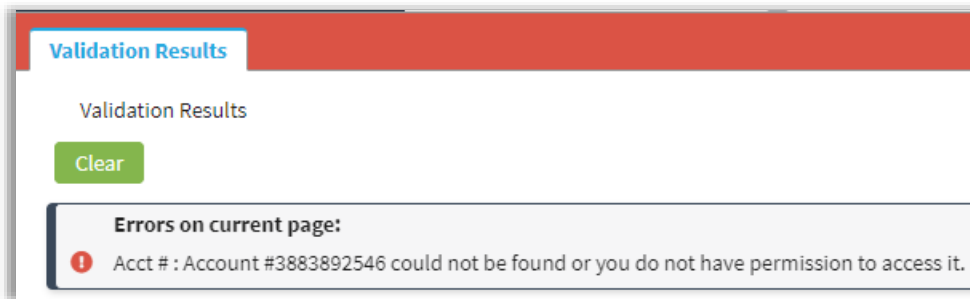
   b) Note the account number and submission number.

| Actions | ⇶ | ⭐ Submission (Quoted) | 🏠 Businessowners | Eff. 09/24/2018 | **Happy Bakery01** | Account # 3883892546 |

Submission 0017036543
Quoted

Offerings

5. **Log out and log in as Betsy HartXX (e.g., bhart01/gw)**

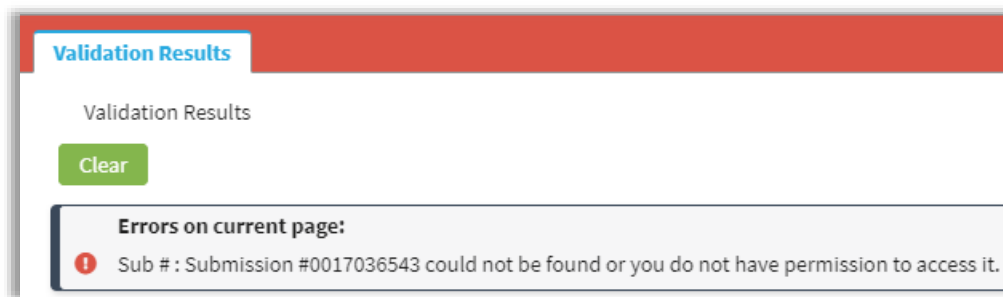6. **Search for the account and submission created in the step above**

   Can Betsy access them? Why?

   PolicyCenter restricts data access using producer code security. Betsy HartXX does not have the corresponding producer code used on the account and submission which was created by Carlos Hart.

   a) Enter the account number in the account search box. An error is displayed.

   Validation Results

   Validation Results

   [Clear]

   Errors on current page:
   🛈 Acct # : Account #3883892546 could not be found or you do not have permission to access it.

   b) Enter the submission number in the submission search box. An error is displayed.

   Validation Results

   Validation Results

   [Clear]

   Errors on current page:
   🛈 Sub # : Submission #0017036543 could not be found or you do not have permission to access it.

7. **Configure PolicyCenter so that Betsy HartXX can access the account and submission created by Carlos Hart**

   a) Log out and log in as superuser (su/gw)
   b) Search for the user Betsy HartXX (e.g., Betsy Hart01)
   c) Edit the user and on the Access tab add additional producer code 501-002552
   d) Ensure that the user has the Producer role
   e) Update the user (Ignore the warning message and click update again)

f) Repeat step #5 above. Now Betsy HartXX can access both the account and submission created by Carlos Hart because she has the matching producer code to the one on the account and submission.

12.4   References

12.4.1   Managing organization

Reference

Organizations

- The tree browser (seen on the Administration tab) will always show the home organization of the user (either internal or external).
- The **Basics** card displays the Organization info, e.g., name, type, address, supervisor, etc. The load factor used by the assignment rules to assign an activity to a user or group within this organization is displayed here.
- The **Users** card lists users under that organization.
- The **Producer Codes** card displays the producer codes and a list view of the description, status, branch and the preferred underwriter for each code.
- The **Queues** tab lists the queues used for activity assignment.
- The **Regions** tab lists the regions that the system can use when making assignment decisions.

12.4.2   Managing producer codes

Reference

Producer Codes

- The **Basics** tab lists the code, description, organization, status and other information related to the producer code.
- The **Roles** tab lists the roles assigned to the producer code.
- The **Groups** tab lists the groups that have this producer code security, in view only mode.
- The **Users** tab lists the users that have access to this producer code, in view only mode.
- The producer code can be added to users and groups using the Edit Users or Edit Groups administration screens, respectively. The producer code screen gets updated.

Stop