

# 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 (**2<sup>nd</sup> 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 2<sup>nd</sup> 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 2<sup>nd</sup> browser log in as Chris Clark (**cclark/gw**), who is an underwriter but does not have the **Commission Override 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 2<sup>nd</sup> browser log out and log in as **Eleanor PhelanXX**, the underwriter who also has the Commission Override 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 2<sup>nd</sup> 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:*

The screenshot shows the Security Dictionary interface. On the left, under the 'Pages' section, the link 'AccountCreateDisbursementWizard' is highlighted with a red box. On the right, the details for 'AccountCreateDisbursementWizard' are shown. Under the 'Description' section, two permission expressions are listed, each with a red box around the text: 'Visit Permission Expression: perm.Transaction.disbcreate' and 'Edit Permission Expression: perm.Transaction.disbcreate'.

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

The screenshot shows the details for the 'disbcreate' permission. At the top, it says 'disbcreate (static) - Create disbursement'. Below this, under the 'Roles' section, there is a list of roles with their descriptions:

- 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

- 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:

The screenshot displays the 'Security Dictionary' interface. On the left, a list of system permissions is shown, with 'billplanview' highlighted by a red rectangle. On the right, the details for 'billplanview' are shown, including its description and a list of roles.

billplanview (static) - View billing plans
► Description
<b>Roles</b>
<u><a href="#">AdminData.Role.Name.All_Permissions</a></u> AdminData.Role.Description.All_Permissions
<u><a href="#">AdminData.Role.Name.Billing_Clerical</a></u> AdminData.Role.Description.Billing_Clerical
<u><a href="#">AdminData.Role.Name.Billing_Manager</a></u> AdminData.Role.Description.Billing_Manager
<u><a href="#">AdminData.Role.Name.Finance_Manager</a></u> AdminData.Role.Description.Finance_Manager
<u><a href="#">AdminData.Role.Name.General_Admin</a></u> AdminData.Role.Description.General_Admin
<u><a href="#">AdminData.Role.Name.Plan_Admin</a></u> AdminData.Role.Description.Plan_Admin
<u><a href="#">AdminData.Role.Name.Underwriter</a></u> 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

« < 1 / 2 > » (1 - 15 of 27) Columns

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

Permission *	Code	Description
<input type="checkbox"/> Override commission percentage on policyperiod	commpcoride	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	commpplanoride	Permission to override the commission plan for a producer on a single policyperiod for a given role
<input type="checkbox"/> Edit producer details	proddetedit	Permission to change details for a producer

- 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**.

**Underwriter** Up to Roles Update Cancel

**Permissions** **User**

Role  
Name: \* Underwriter  
Description: Permissions for underwriter

Add Remove

Permission	Code	Description
<input type="checkbox"/> Edit user language	usereditlang	Permission to edit language
<input type="checkbox"/> 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	commpcoride	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
<input type="checkbox"/> 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**.

**User Search**

User Name:   
 First name:   
 Last name:   
 Group Name:   
 Search Unassigned Users: ☐ Yes ☒ No  
 Role: Underwriter

Search Reset

**Results**

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

Add User Role Remove Selected Role

	Name *	Description
<input type="checkbox"/>	Underwriter	Permissions for underwriter
<input type="checkbox"/>	Commission Override	Ability to override commission

#### 4. To test the new role:

- a) In the **2<sup>nd</sup> 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 **2<sup>nd</sup> browser** log in as **Chris Clark (cclark/gw)**, who is an underwriter but does not have the Commission Override 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.*

Policy#GL01-CAUTO-1
Account#LAB00540
ProducerBaker & Associates
May 4, 2018

### Commissions

Transfer Policy
Override Plan

- g) In the **2<sup>nd</sup> browser** log out and log in as **Eleanor PhelanXX**, the underwriter who also has the Commission Override 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**.*

Policy#GL01-CAUTO-1 | Account#LAB00540 | ProducerBaker & Associates | May 4, 2018

## Override Commission Plan

[Return to Commissions](#) [Update](#) [Cancel](#)

Override Primary (Baker & Associates)

\* Percentage

\* 11

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**.

Policy#GL01-CAUTO-1 | Account#LAB00540 | ProducerBaker & Associates | May 4, 2018

## Override Commission Plan

[Return to Commissions](#) [Update](#) [Cancel](#)

Override Primary (Baker & Associates)

\* Alternate Plan

\* CP02 All Tiers Personal  [Q](#)

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*

## Commercial Lines

[Return to Groups](#)

Parent [Central Billing](#)

Supervisor [Edward Lee](#)

Security Zone [Commercial Lines Zone](#)

Users

User	Vacation Status	Backup User
Edward Lee	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 **2<sup>nd</sup> 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.*