

Permissions

Lesson Objectives

By the end of this lesson, you should be able to:

- Describe the role of permissions in controlling user capabilities within ClaimCenter
- Assign permissions to users
- Describe the information in the security dictionary

This lesson uses the notes section for additional explanation and information.

To view the notes in PowerPoint, choose View→Normal or View→Notes Page.

If you choose to print the notes for the lesson, be sure to select “Print hidden slides.”

Lesson Outline

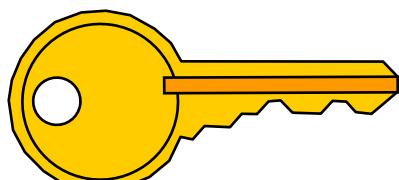
- ▶ Permissions
- ▶ Assigning Permissions to Users
- ▶ The Security Dictionary

Access

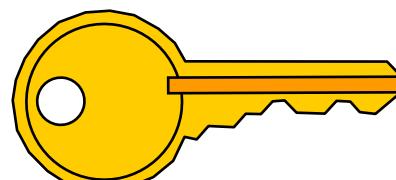
The screenshot shows the ClaimCenter application interface. At the top, there is a navigation bar with tabs: Desktop, Search, Team (highlighted in blue), Address Book, Claim, and Vacation. Below the navigation bar, there is a sidebar titled "Actions" with a dropdown arrow. Under "Actions", there is a section titled "My Groups" which lists "Auto1 - TeamB" and several users: Betty Baker, Heidi Johnson, Terence Mazzon, Isabel Numin, Carlos Oppley, and Rick Ralston (Super). There is also a link for "Pending Assignment". To the right of the sidebar, there is a main content area titled "My Groups: Summary" with links for "Summary" and "Aging". Below the main content area, there is another navigation bar with tabs: Search, Address Book, and Claim. On the left side of this bar, there is a sidebar titled "Claims" with options: Activities, Checks, Recoveries, and Bulk Invoices. To the right of the sidebar, there is a search form titled "Search Claims" with "Simple Search" and "Advanced Search" options. The search form includes fields for "Claim #" (containing ".....") and "Policy #", and buttons for "Search" and "Reset". To the right of the search form, there is a vertical list of search filters: "Search", "First Name", "Last Name", "Organization", and "Tax ID". On the far left, there is a yellow smiley face icon with a tie, labeled "Rick Ralston". On the far right, there is another yellow smiley face icon with a tie, labeled "Ida Belt".

- ▶ Access is the ability to see and do things within ClaimCenter based on your user identity
- ▶ ClaimCenter has a rich set of access functionality that is managed through a set of permissions

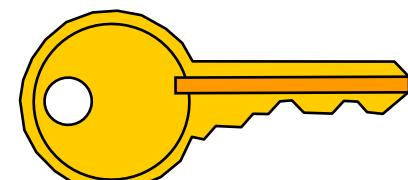
System Permissions



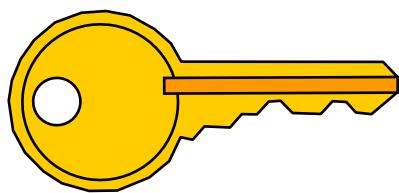
View claims



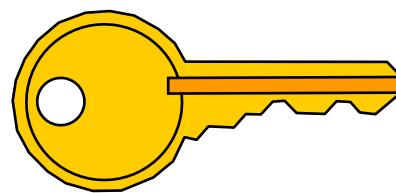
View groups



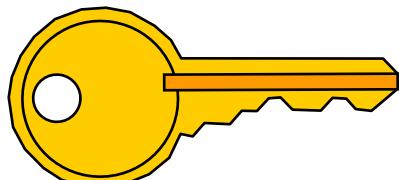
View Desktop



Edit claims



Edit groups



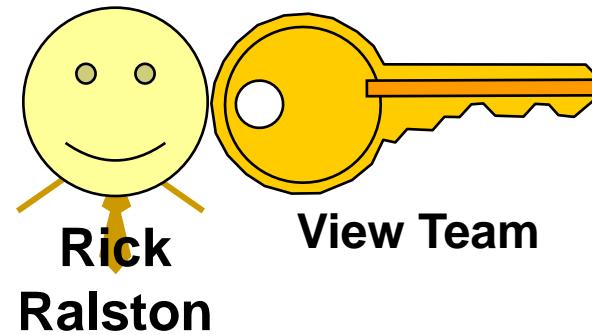
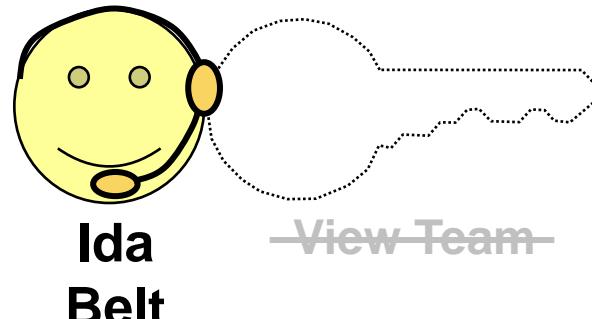
Own claims

- ▶ A system permission is a granular ability to see or do something within ClaimCenter

How Permissions Can Influence Access

- ▶ Whether or not a user has a given permission can determine what they can:
 - View/navigate to
 - Create, edit, and/or delete
 - Own
 - Act on

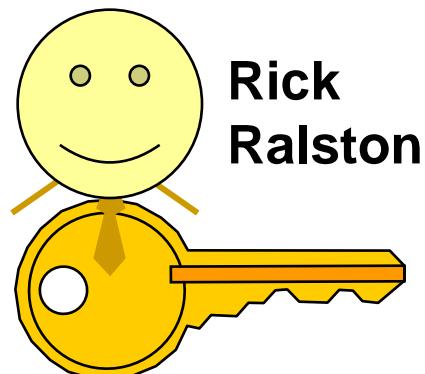
View/Navigate To Permissions



Create Object Permissions



~~Create Address Book Contacts~~



Create Address Book Contacts

Contacts
Contacts | Users

No matches exist in the Address Book, and a new entry could not be created because you do not have the required permission.

Paula Wellington Primary Plaintiff's Attorney No 606-456-1243

Basics Addresses Related Contacts

Edit Link

This contact is not linked to the Address Book

Roles Related To Judy Rand Lawsuit

Paula Wellington Primary Plaintiff's Attorney

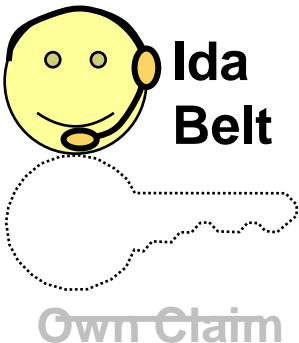
Basics Addresses Related Contacts

Edit Unlink View in Address Book

This contact is linked to the Address Book and is in sync

A red arrow points from the "Link" button in the first screenshot to the "Unlink" button in the second screenshot, indicating the inverse relationship between linking and unlinking contacts.

Own Object Permissions



Ida
Belt

Own Claim

Select how you would like to do the assignment

Select from list: Use automated assignment

Find a user or group:

	User	Group	Parent Group
Assign	Ida Belt	Western Call Center	Western Regional Claims Center

Assign (Return to Betty Baker: Claims)
Claims | Exposures | Activities | Matters

► Some assignment(s) failed, see below for details. Please assign the item(s) to another user or group

► User Ida Belt does not have permission to be assigned item 000-00-000047 (owning the item requires 'Claim own' permission)"



Carlos
Oppley

Own Claim

Select how you would like to do the assignment

Select from list: Use automated assignment

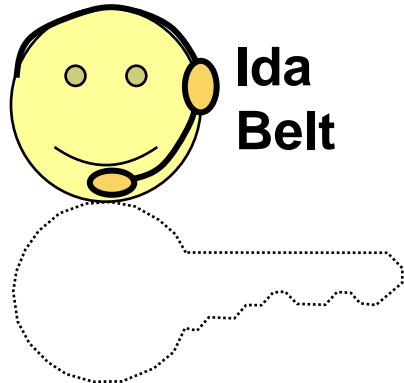
Find a user or group:

	User	Group	Parent Group
Assign	Carlos Oppley	Auto1 - TeamB	Auto - Level1

Claim (000-00-000047) | Vacation

► | Car Pol: 53-263535 | Ins: Mark Henderson | DoL: 05/27/2001
Adj: Carlos Oppley (Auto1 - TeamB)

Act On Permissions



**Ida
Belt**

Close Claim



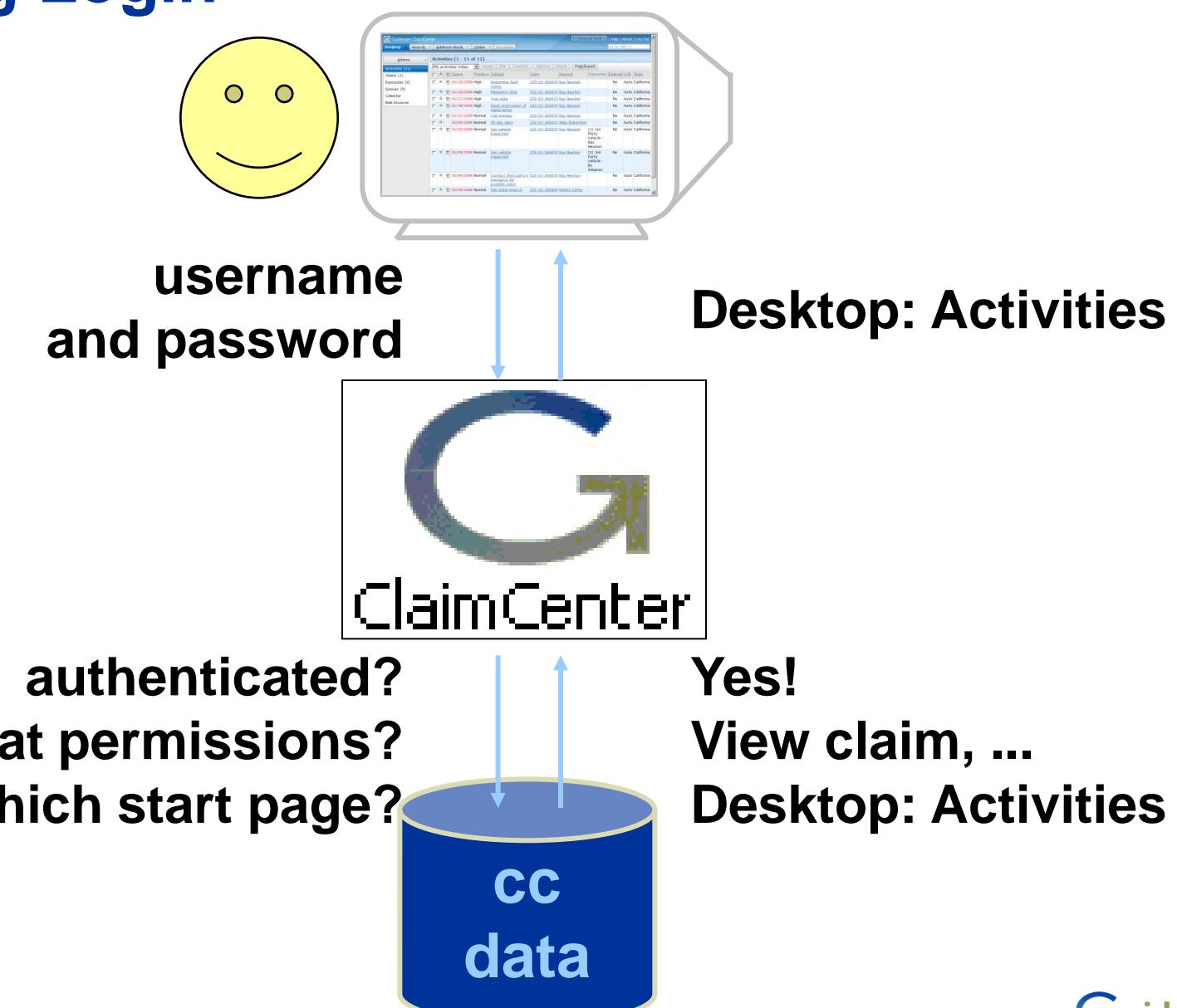
**Betty
Baker**

Close Claim

Actions		New ...	New Exposure
Summary		Note	Choose by Coverage Type
Loss Details		Email	Choose by Coverage
Exposures		New Document	Claim Actions
Parties Involved		Create from a template	Assign Claim
Financials		Attach an existing document	Indicate existence of a document

Actions		New ...	New Activity
Summary		Note	Correspondence
Workplan		Email	Interview
Loss Details		Matter	New Mail
Exposures		Evaluation	Reminder
Parties Involved		Negotiation	Request
Policy		New Transaction	New Exposure
Financials		Reserve	Choose by Coverage Type
Notes		Check	Choose by Coverage
Documents		Other	Claim Actions
Plan of Action		New Document	Assign Claim
Subrogation		Create from a template	Close Claim
		Attach an existing document	Print Claim
		Indicate existence of a document	Sync Status

A User's Permissions Are Determined During Login

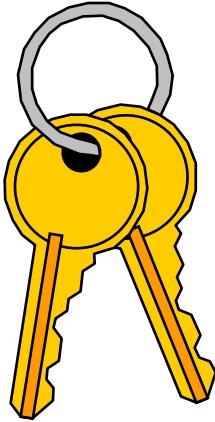


Lesson Outline

- ▶ Permissions
- ▶ Assigning Permissions to Users
- ▶ The Security Dictionary

Roles

CSR



View claims
Create claims
Edit claims
Edit exposures

...

Adjuster



View claims
View confidential Notes
Create claims
Own claims
Edit claims
Edit exposures
Edit matters

...

- ▶ A role is a named collection of permissions used to simplify the assignment of permissions to users
 - Typically, a role maps to a job title or a job function

Managing Roles

Actions		Roles (1 - 15 of 15)	
		Add Role	Delete
	<input type="checkbox"/>	Role	Description
	<input type="checkbox"/>	Adjuster	Base permissions for an adjuster
	<input type="checkbox"/>	Catastrophe Admin	Permissions for managing catastrophes
	<input type="checkbox"/>	Claims Supervisor	Base permissions for a claims supervisor
	<input type="checkbox"/>	Clerical	Base permissions for a clerical user
	<input type="checkbox"/>	Customer Service Representative	Limited view for a customer service representative
	<input type="checkbox"/>	Integration Admin	Permissions for integration admin
	<input type="checkbox"/>	Manager	Base permissions for a manager
	<input type="checkbox"/>	New Loss Processing Supervisor	Base permissions for a claims supervisor
	<input type="checkbox"/>	Preferred Vendor Admin	Permissions for managing preferred vendors
	<input type="checkbox"/>	Reporting Admin	Permissions for reporting admin
	<input type="checkbox"/>	Rule Admin	Permissions for rule admin
	<input type="checkbox"/>	Superuser	Superuser with full permissions
	<input type="checkbox"/>	Trusted for Sensitive Claims	Permissions for managing sensitive claims
	<input type="checkbox"/>	User Admin	Permissions for user admin
	<input type="checkbox"/>	Viewer	User with view-only permissions

- ▶ Accessing the Roles list view requires the "Manage Roles" permission, which is typically given only to high-level supervisors

Modifying Permissions in a Role

Screenshot of the Guidewire interface showing the 'Roles' screen and the 'Adjuster' role details.

The 'Actions' sidebar on the left includes: Search For Users, Search For Groups, Search For Regions, Activity Patterns, Attribution, Catastrophe Admin, Authority, and Roles (selected).

The 'Roles (1 - 15 of 15)' table shows two rows:

Role	Description
Adjuster	Base permissions for an adjuster
Catastrophe Admin	Permissions for managing catastrophes

The 'Adjuster (Up to Roles)' dialog is open, showing the 'Basics' tab. It displays the role name 'Adjuster' and its description 'Base permissions for an adjuster'. A large yellow key icon is displayed next to the role details.

The 'Permissions' table lists six permissions, each associated with a yellow key icon:

* Permission	Code	Description
Close claims	claimclose	Permission to close a claim
Close exposures	expclose	Permission to close an exposure
Close matters	mttrclose	Permission to close matters on a claim
Create activities	actcreate	Permission to create new activities
Create activities on closed claim	actcreateclsd	Permission to create a new activity associated with a closed claim

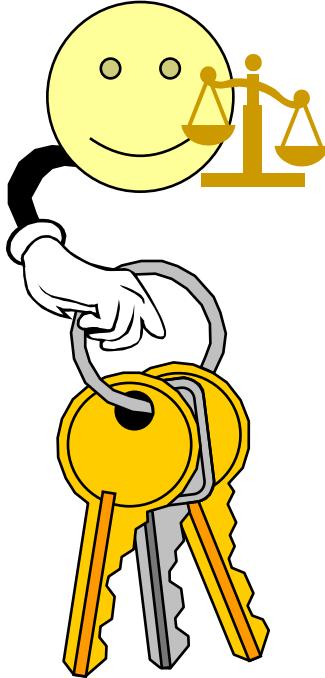
Mapping Roles to Users

Ida Belt



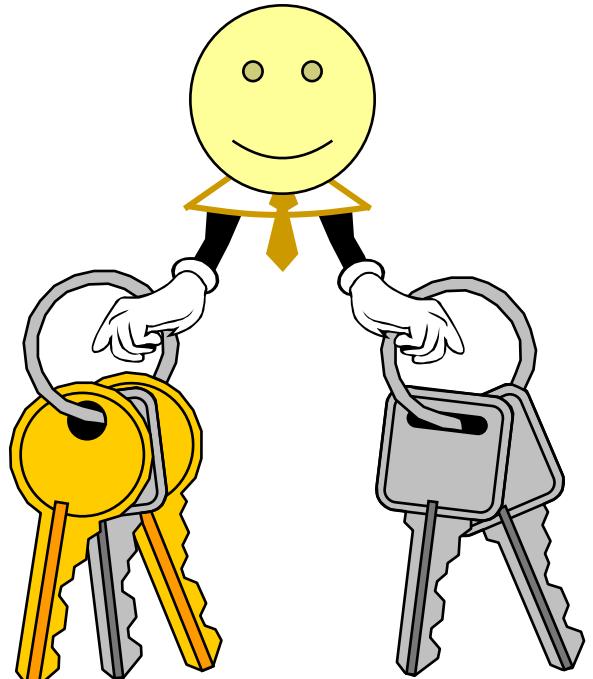
CSR

Betty Baker



Adjuster

Rick Ralston



Adjuster

Manager

- ▶ Each user is given one or more roles
 - A user has all the permissions of the roles s/he is given

Modifying Roles for a User

Carlos Oppley
User Details | Activities | Claims | Exposures | Matters

Update Cancel

Basics Profile Authority Limits Attributes Regions

This contact is not linked to the Address Book

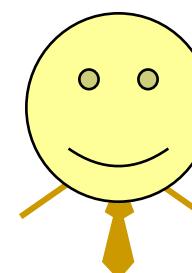
Security

First Name * Carlos
Last Name * Oppley
User name * coppley

Roles

Add Remove

<input type="checkbox"/>	* Name	Description
<input type="checkbox"/>	Adjuster	Base permissions for an adjuster
<input type="checkbox"/>	Trusted for Sensitive Claims	Permissions for managing sensitive claims



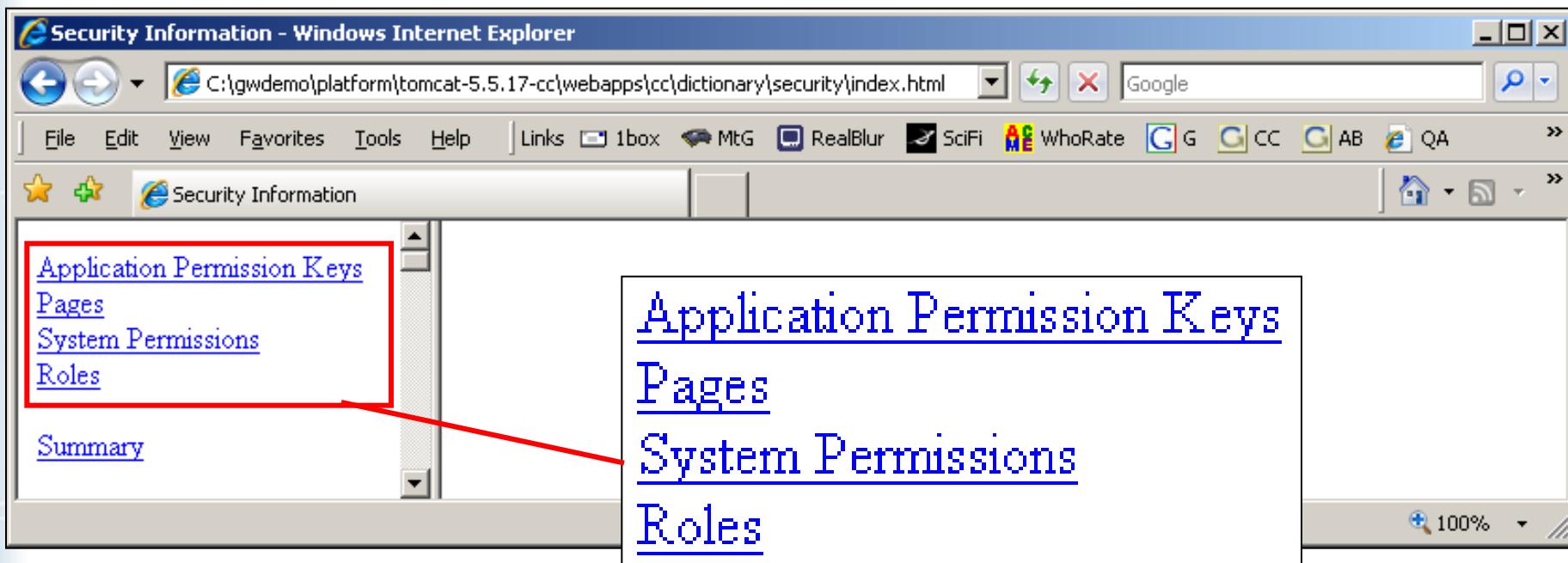
- ▶ A user can be given one or many roles using the Roles list in the user detail view

Lesson Outline

- ▶ Permissions
- ▶ Assigning Permissions to Users
- ▶ The Security Dictionary

The Security Dictionary

- ▶ The security dictionary is a series of HTML pages that document the permissions and roles in your application
 - The dictionary has four main sections
 - When you add or edit permissions or roles, you can regenerate the information in these sections to reflect the changes



System Permissions in the Security Dictionary

The screenshot shows the Guidewire Security Dictionary interface. On the left, a sidebar lists navigation items: Application Permission Keys, Pages, System Permissions (which is highlighted with a red box), and Roles. Below these are various permission keys listed as hyperlinks, with `claimedit` also highlighted with a red box. A red arrow points from the `claimedit` link in the sidebar to its detailed description on the right. The main content area displays the details for the `claimedit` permission key, which is described as "(claim-related) - Edit claim". It includes a 'Description' section and a 'Roles' section. The 'Roles' section lists several roles with their descriptions: **Adjuster** (Base permissions for an adjuster), **Appraiser** (Base permissions for an appraiser), **Catastrophe Administrator** (Permissions for managing catastrophes), **CSR** (Limited view for a customer service representative), **Finance Specialist** (Base permissions for a finance specialist), and **Legal** (Base permissions for a legal professional). A horizontal scrollbar is visible at the bottom of the main content area.

Application Permission Keys

Pages

System Permissions

Roles

[claimclose](#)
[claimcreate](#)
[claimedit](#)
[claimeditclsd](#)
[claimintegadmin](#)
[claimown](#)
[claimprint](#)
[claimprtsmanage](#)
[claimprtsmanclsd](#)
[claimraown](#)
[claimraunown](#)
[claimremflag](#)
[claimreopen](#)
[claimselectplcy](#)
[claimsplcycclsd](#)
[claimusermanage](#)
[claimusermanclsd](#)
[claimvalidate](#)
[claimview](#)
[claimviewpay](#)
[claimviewrec](#)

claimedit (claim-related) - Edit claim

► Description

Roles

Adjuster
Base permissions for an adjuster

Appraiser
Base permissions for an appraiser

Catastrophe Administrator
Permissions for managing catastrophes

CSR
Limited view for a customer service representative

Finance Specialist
Base permissions for a finance specialist

Legal
Base permissions for a legal professional

Roles in the Security Dictionary

Application Permission Keys

Pages	Adjuster
System	Appraiser
Roles	Catastrophe Administrator
	Cleanup Specialist
	CSR
	External Customer
	Finance Specialist
	Integration Administrator
	Legal
	Medical Case Manager
	Policy Processor
	Producer
	Recovery Specialist
	Repair Specialist
	Reporting Administrator
	Rule Writer
	Special Investigation
	Specialist
	Underwriter
	User Administrator
	Sensitive Claims
	Supervisor
	Manager

Adjuster

► Description

Permissions

abedit
Permission to edit an existing contact in the address book

abview
Permission to view and search contact entries in the address book

actcreate
Permission to create new activities

actmakemand
Permission to set whether an activity is mandatory

actown
Permission to own an activity and to see the Desktop Activities page

actqueuenext
Permission to get the next activity off of a queue

Lesson Objectives Review

You should now be able to:

- Describe the role of permissions in controlling user capabilities within ClaimCenter
- Assign permissions to users
- Describe the information in the security dictionary

Review Questions

1. When does ClaimCenter determine which permissions a given user has?
2. How many permissions can a given role have?
3. How many roles can a given user have?
4. How could you easily determine the number of roles that enable users to create matters?

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