

# Permissions

# Lesson Objectives

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

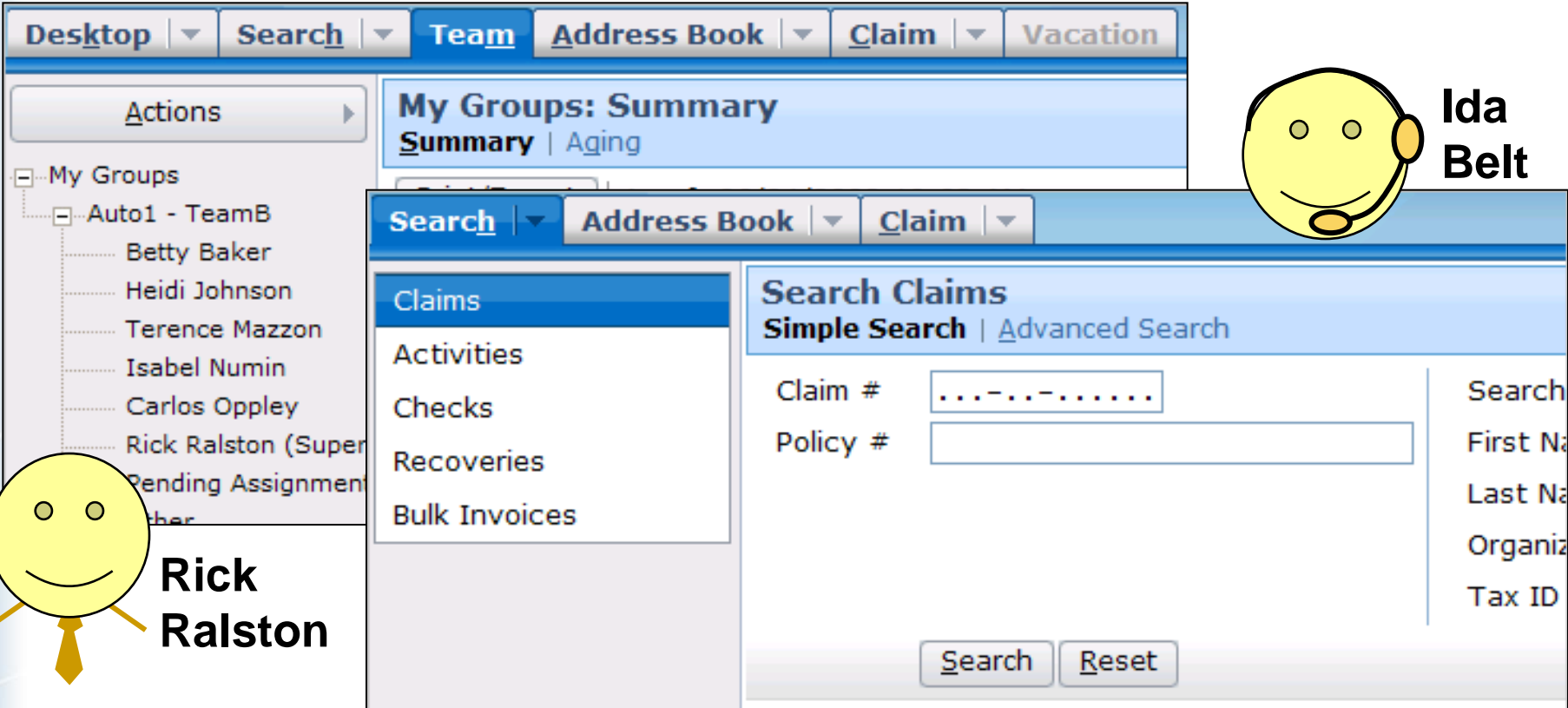
- Describe the role of permissions in controlling user capabilities within ClaimCenter
- Assign permissions to users
- Describe the information in the security dictionary

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

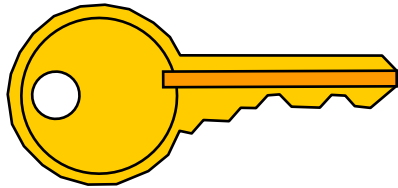
# Access



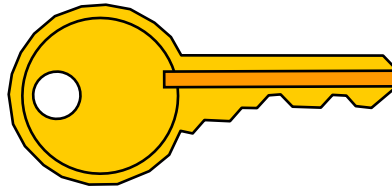
The screenshot displays the ClaimCenter web application interface. At the top, there is a navigation bar with tabs: Desktop, Search, Team, Address Book, Claim, and Vacation. Below this, the main content area is divided into sections. On the left, there is a sidebar with a tree view under 'My Groups' showing a list of users: Betty Baker, Heidi Johnson, Terence Mazzon, Isabel Numin, Carlos Opoley, Rick Ralston (Super), and Pending Assignment. A yellow smiley face icon with a tie is positioned next to 'Rick Ralston'. In the center, there is a 'My Groups: Summary' section with a dropdown menu showing options: Claims, Activities, Checks, Recoveries, and Bulk Invoices. To the right of this, there is a 'Search Claims' section with a 'Simple Search' tab selected. It contains input fields for 'Claim #' and 'Policy #', and a 'Search' button. A yellow smiley face icon with a headset is positioned above the 'Search Claims' section, with the text 'Ida Belt' next to it. The bottom of the interface shows a 'Search' button and a 'Reset' button.

- ▶ 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

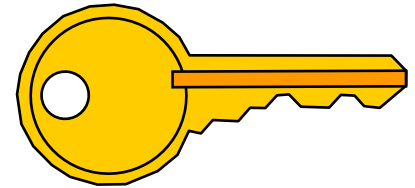
# System Permissions



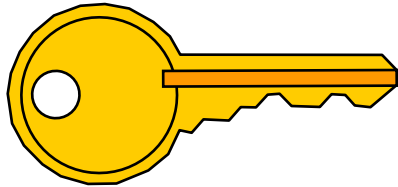
**View claims**



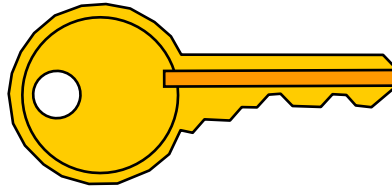
**View groups**



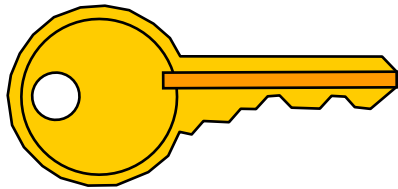
**View Desktop**



**Edit claims**



**Edit groups**



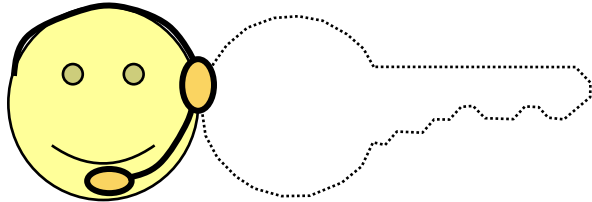
**Own claims**

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

# How Permissions Can Influence Access

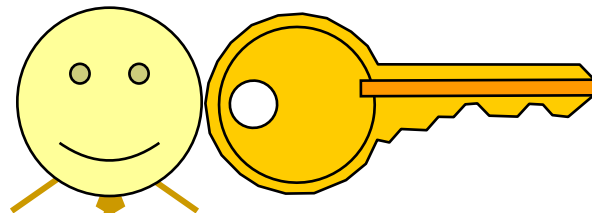
- ▶ Whether or not a user has a given permission can determine what they can:
  - View/navigate to
  - Create, edit, and/or delete
  - Own
  - Act on

# View/Navigate To Permissions



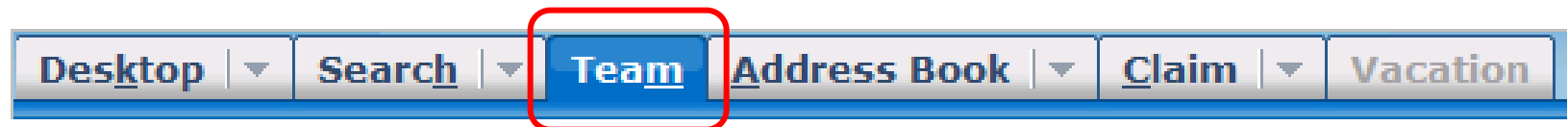
**Ida  
Belt**

~~View Team~~



**Rick  
Ralston**

**View Team**



# 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

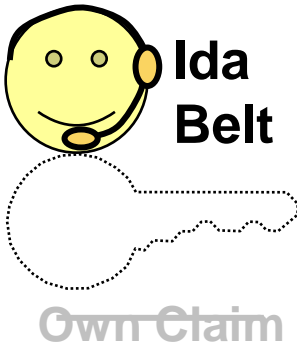
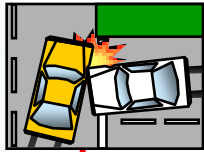
Basics Addresses Related Contacts

Edit Unlink View in Address Book

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



# Own Object Permissions



Select how you would like to do the assignment

☐ Select from list:

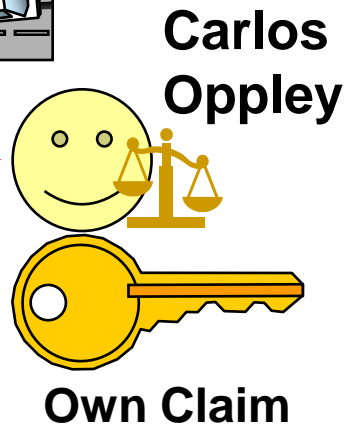
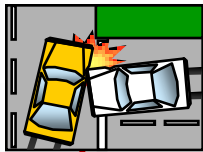
☒ Find a user or group:

	User	Group	Parent Group
<b>Assign</b>	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)"



Select how you would like to do the assignment

☐ Select from list:

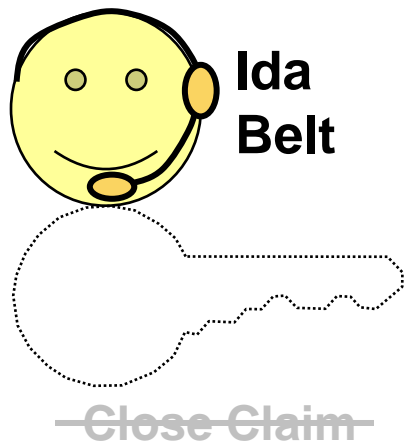
☒ Find a user or group:

	User	Group	Parent Group
<b>Assign</b>	Carlos Oppley	Auto1 - TeamB	Auto - Level1

**Claim (000-00-000047)** | Vacation

Pol: 53-263535 | Ins: Mark Henderson | DoL: 05/27/2000  
Adj: Carlos Oppley (Auto1 - TeamB)

# Act On Permissions

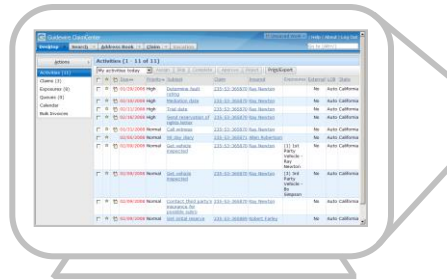
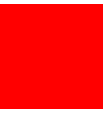


Actions		
Summary	<b>New ...</b>	<b>New Exposure</b>
Loss Details	<u>N</u> ote	<u>C</u> hoose by Coverage Type
Exposures	<u>E</u> mail	Choose by Coverage
Parties Involved	<b>New Document</b>	<b>Claim Actions</b>
Financials	<u>C</u> reate from a template	<u>A</u> ssign Claim
	<u>A</u> ttach an existing document	
	<u>I</u> ndicate existence of a document	



Actions		
Summary	<b>New ...</b>	<b>New Activity</b>
Workplan	<u>N</u> ote	Correspondence
Loss Details	<u>E</u> mail	<u>I</u> nterview
Exposures	<u>M</u> atter	New Mail
Parties Involved	<u>E</u> valuation	Reminder
Policy	Negotiation	Request
Financials	<b>New Transaction</b>	<b>New Exposure</b>
Notes	<u>R</u> eserve	<u>C</u> hoose by Coverage Type
Documents	<u>C</u> heck	Choose by Coverage
Plan of Action	<u>O</u> ther	<b>Claim Actions</b>
Subrogation	<b>New Document</b>	Assign Claim
	<u>C</u> reate from a template	<u>C</u> lose Claim
	<u>A</u> ttach an existing document	Print Claim
	<u>I</u> ndicate existence of a document	Sync Status

# A User's Permissions Are Determined During Login



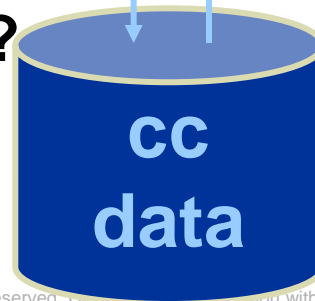
**username  
and password**

**Desktop: Activities**



**authenticated?  
what permissions?  
which start page?**

**Yes!  
View claim, ...  
Desktop: Activities**

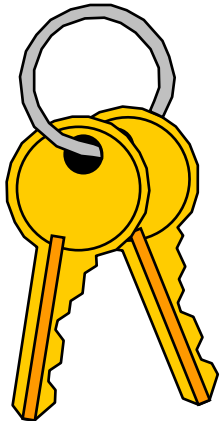


# Lesson Outline

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

# Roles

## CSR



**View claims**

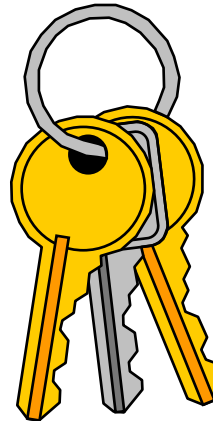
**Create claims**

**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

<div>Actions ▸</div>	<div>Roles (1 - 15 of 15)</div>																																
<div>Search For Users</div> <div>Search For Groups</div> <div>Search For Regions</div> <div>Activity Patterns</div> <div>Attributes</div> <div>Catastrophes</div> <div>Authority Limit Profile</div> <div><b>Roles</b></div> <div>Regions</div> <div>Holidays</div> <div>Event Messages</div> <div>Script Parameters</div> <div>Workflows</div> <div>Import/Export Data</div> <div>Report Admin</div> <div>Security Zones</div> <div>Coverage Verification</div>	<div> <div>Add Role</div> <div>Delete</div> </div> <table> <tr> <th data-bbox="579 299 1081 342"><input type="checkbox"/> Role△</th><th data-bbox="1081 299 1758 342">Description△△</th></tr> <tr> <td data-bbox="579 342 1081 385"><input type="checkbox"/> <a href="#">Adjuster</a></td><td data-bbox="1081 342 1758 385">Base permissions for an adjuster</td></tr> <tr> <td data-bbox="579 385 1081 428"><input type="checkbox"/> <a href="#">Catastrophe Admin</a></td><td data-bbox="1081 385 1758 428">Permissions for managing catastrophes</td></tr> <tr> <td data-bbox="579 428 1081 471"><input type="checkbox"/> <a href="#">Claims Supervisor</a></td><td data-bbox="1081 428 1758 471">Base permissions for a claims supervisor</td></tr> <tr> <td data-bbox="579 471 1081 514"><input type="checkbox"/> <a href="#">Clerical</a></td><td data-bbox="1081 471 1758 514">Base permissions for a clerical user</td></tr> <tr> <td data-bbox="579 514 1081 556"><input type="checkbox"/> <a href="#">Customer Service Representative</a></td><td data-bbox="1081 514 1758 556">Limited view for a customer service representative</td></tr> <tr> <td data-bbox="579 556 1081 599"><input type="checkbox"/> <a href="#">Integration Admin</a></td><td data-bbox="1081 556 1758 599">Permissions for integration admin</td></tr> <tr> <td data-bbox="579 599 1081 642"><input type="checkbox"/> <a href="#">Manager</a></td><td data-bbox="1081 599 1758 642">Base permissions for a manager</td></tr> <tr> <td data-bbox="579 642 1081 685"><input type="checkbox"/> <a href="#">New Loss Processing Supervisor</a></td><td data-bbox="1081 642 1758 685">Base permissions for a claims supervisor</td></tr> <tr> <td data-bbox="579 685 1081 728"><input type="checkbox"/> <a href="#">Preferred Vendor Admin</a></td><td data-bbox="1081 685 1758 728">Permissions for managing preferred vendors</td></tr> <tr> <td data-bbox="579 728 1081 771"><input type="checkbox"/> <a href="#">Reporting Admin</a></td><td data-bbox="1081 728 1758 771">Permissions for reporting admin</td></tr> <tr> <td data-bbox="579 771 1081 813"><input type="checkbox"/> <a href="#">Rule Admin</a></td><td data-bbox="1081 771 1758 813">Permissions for rule admin</td></tr> <tr> <td data-bbox="579 813 1081 856"><input type="checkbox"/> <a href="#">Superuser</a></td><td data-bbox="1081 813 1758 856">Superuser with full permissions</td></tr> <tr> <td data-bbox="579 856 1081 899"><input type="checkbox"/> <a href="#">Trusted for Sensitive Claims</a></td><td data-bbox="1081 856 1758 899">Permissions for managing sensitive claims</td></tr> <tr> <td data-bbox="579 899 1081 942"><input type="checkbox"/> <a href="#">User Admin</a></td><td data-bbox="1081 899 1758 942">Permissions for user admin</td></tr> <tr> <td data-bbox="579 942 1081 985"><input type="checkbox"/> <a href="#">Viewer</a></td><td data-bbox="1081 942 1758 985">User with view-only permissions</td></tr> </table>	<input type="checkbox"/> Role△	Description△△	<input type="checkbox"/> <a href="#">Adjuster</a>	Base permissions for an adjuster	<input type="checkbox"/> <a href="#">Catastrophe Admin</a>	Permissions for managing catastrophes	<input type="checkbox"/> <a href="#">Claims Supervisor</a>	Base permissions for a claims supervisor	<input type="checkbox"/> <a href="#">Clerical</a>	Base permissions for a clerical user	<input type="checkbox"/> <a href="#">Customer Service Representative</a>	Limited view for a customer service representative	<input type="checkbox"/> <a href="#">Integration Admin</a>	Permissions for integration admin	<input type="checkbox"/> <a href="#">Manager</a>	Base permissions for a manager	<input type="checkbox"/> <a href="#">New Loss Processing Supervisor</a>	Base permissions for a claims supervisor	<input type="checkbox"/> <a href="#">Preferred Vendor Admin</a>	Permissions for managing preferred vendors	<input type="checkbox"/> <a href="#">Reporting Admin</a>	Permissions for reporting admin	<input type="checkbox"/> <a href="#">Rule Admin</a>	Permissions for rule admin	<input type="checkbox"/> <a href="#">Superuser</a>	Superuser with full permissions	<input type="checkbox"/> <a href="#">Trusted for Sensitive Claims</a>	Permissions for managing sensitive claims	<input type="checkbox"/> <a href="#">User Admin</a>	Permissions for user admin	<input type="checkbox"/> <a href="#">Viewer</a>	User with view-only permissions
<input type="checkbox"/> Role△	Description△△																																
<input type="checkbox"/> <a href="#">Adjuster</a>	Base permissions for an adjuster																																
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<input type="checkbox"/> <a href="#">Reporting Admin</a>	Permissions for reporting admin																																
<input type="checkbox"/> <a href="#">Rule Admin</a>	Permissions for rule admin																																
<input type="checkbox"/> <a href="#">Superuser</a>	Superuser with full permissions																																
<input type="checkbox"/> <a href="#">Trusted for Sensitive Claims</a>	Permissions for managing sensitive claims																																
<input type="checkbox"/> <a href="#">User Admin</a>	Permissions for user admin																																
<input type="checkbox"/> <a href="#">Viewer</a>	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

**Actions**

- Search For Users
- Search For Groups
- Search For Regions
- Activity Patterns
- Attribut
- Catastr
- Authorit
- Roles**
- Regions
- Holidays
- Event M
- Script P
- Workflo
- Import/t
- Report A
- Security
- Coverag

**Roles (1 - 15 of 15)**

Add Role Delete

<input type="checkbox"/> Role△	Description△△
<input checked="" type="checkbox"/> Adjuster	Base permissions for an adjuster
<input type="checkbox"/> Catastrophe Admin	Permissions for managing catastrophes

**Adjuster (Up to Roles)**

Update Cancel

**Basics Users**

**Role**


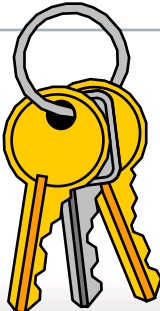
Name \* Adjuster

Description Base permissions for an adjuster

Add Remove

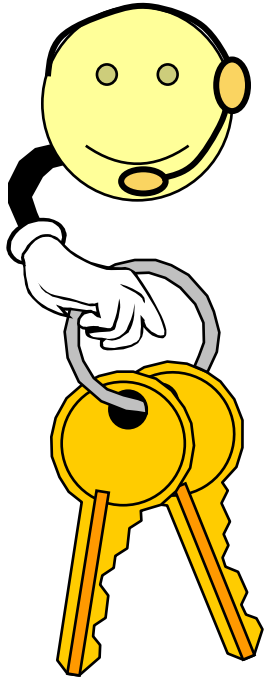
Page 1 of 9 | Prev | Next

<input type="checkbox"/> *Permission△	Code	Description
<input type="checkbox"/> Close claims	claimclose	Permission to close a claim
<input type="checkbox"/> Close exposures	expclose	Permission to close an exposure
<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



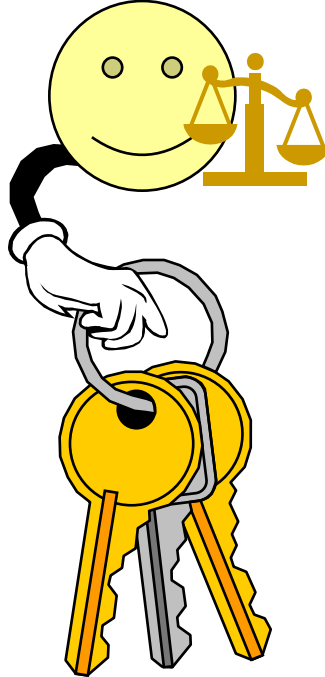
# Mapping Roles to Users

**Ida Belt**



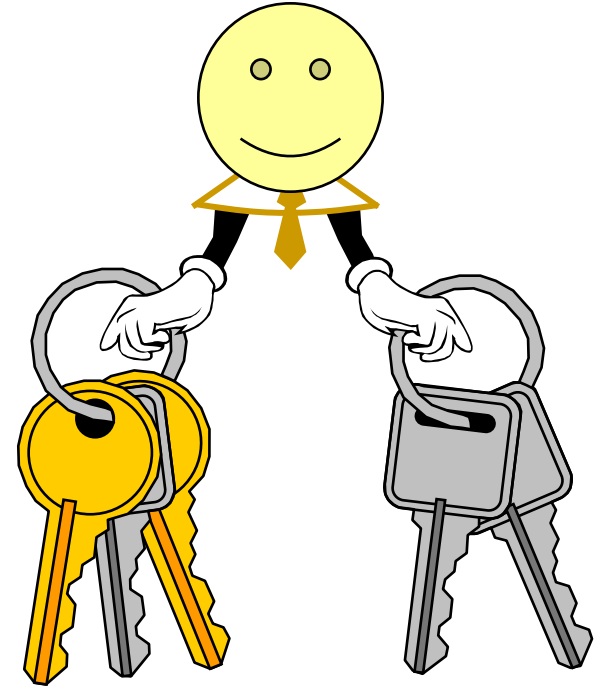
**CSR**

**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



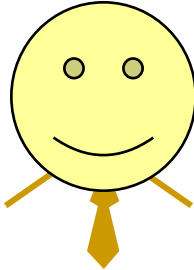
# Modifying Roles for a User

**Carlos Oppley**  
**User Details** | [Activities](#) | [Claims](#) | [Exposures](#) | [Matters](#)


[Basics](#) | [Profile](#) | [Authority Limits](#) | [Attributes](#) | [Regions](#)

**This contact is not linked to the Address Book**

**Security**  
First Name \*   
Last Name \*   
User name \*



**Roles**



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

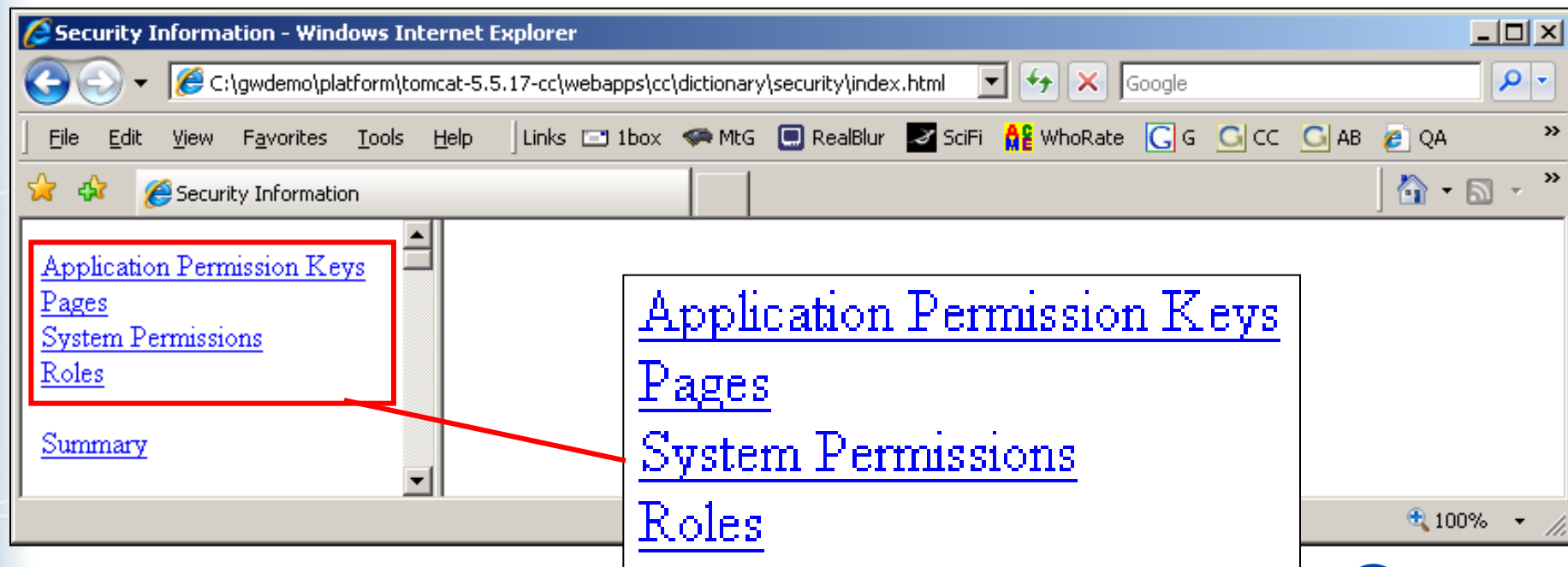
- ▶ A user can be given one or many roles using the Roles list in the user detail view

# 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

[Application Permission Keys](#)

[Pages](#)

[System Permissions](#)

[Roles](#)

[claimclose](#)

[claimcreate](#)

[claimedit](#)

[claimeditclsd](#)

[claimintegadmin](#)

[claimown](#)

[claimprint](#)

[claimprtsmanage](#)

[claimprtsmanclsd](#)

[claimraown](#)

[claimraunown](#)

[claimremflag](#)

[claimreopen](#)

[claimselectply](#)

[claimslplyclsd](#)

[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](#)

[System I](#)

[Roles](#)

[Adjuster](#)

[Appraiser](#)

[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](#)

[IT - 1.001](#)

## 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

#### [actqueueenext](#)

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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