

Working with Security Roles in CCC ONE®

Introduction The job aids within this document describe how to create and work with Security Roles in CCC ONE®.

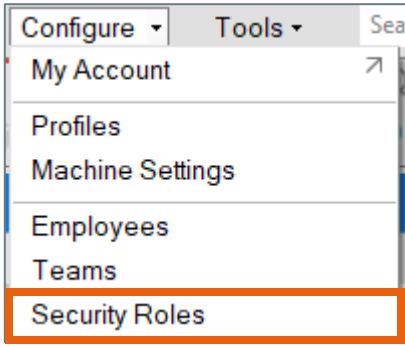
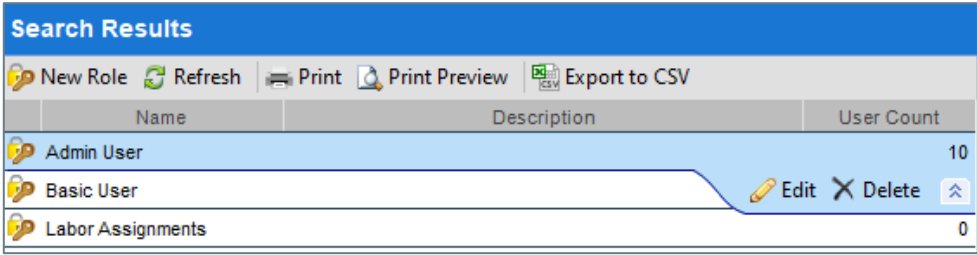
Contents This document contains the following topics:

Topic	See Page
Locate Security Roles in CCC ONE®	2
Using the Role Tab	4
Working with the Users Tab	6
More About Existing Security Roles	7

Locate Security Roles in CCC ONE®

Introduction This document reviews how to locate the Security Roles screen in CCC ONE®.

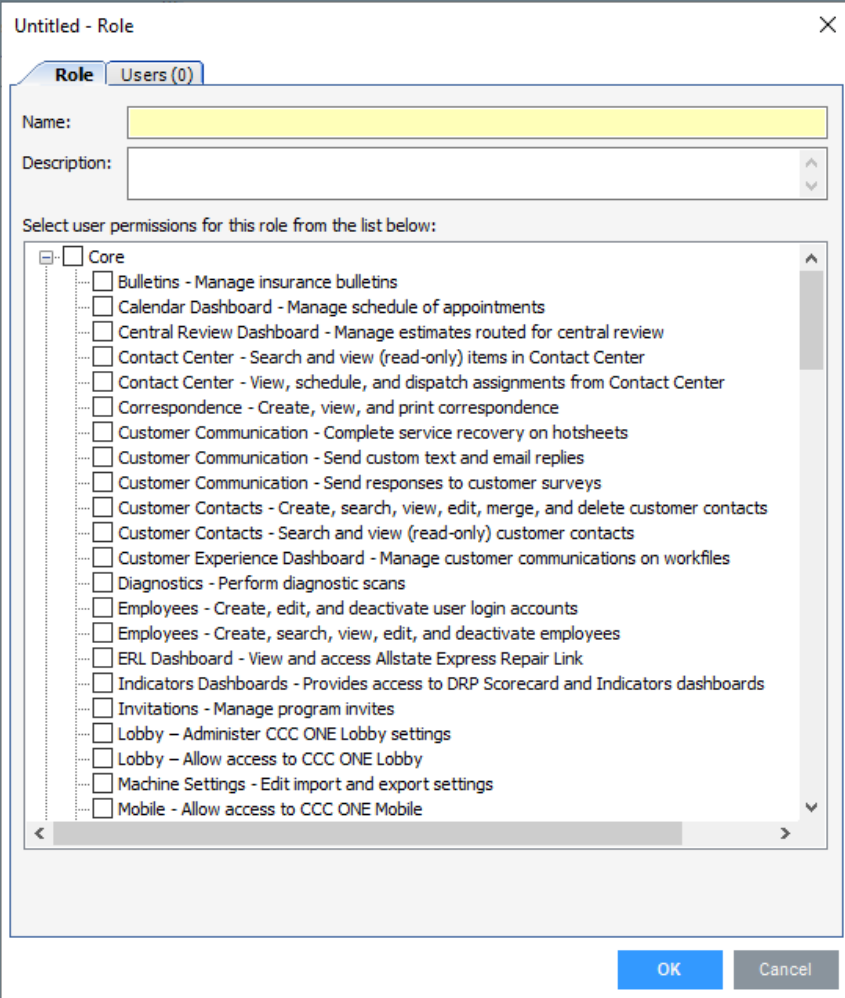
Procedure Use the following steps to locate the Security Roles screen:

Step	Action
1	<p>Go to the Configure Menu and select Security Roles.</p>  <p>Note: Options listed may differ based on modules purchased and access rights.</p>
2	<p>The Security Roles window opens. Add new Roles or edit existing roles. Admin User, Basic User, and Labor Assignments are the default roles provided.</p>
	
3	<p>Click on New Role on the toolbar or click on Edit in an existing role to continue.</p>

Continued on next page

Locate Security Roles in CCC ONE®, Continued

Procedure
(continued)

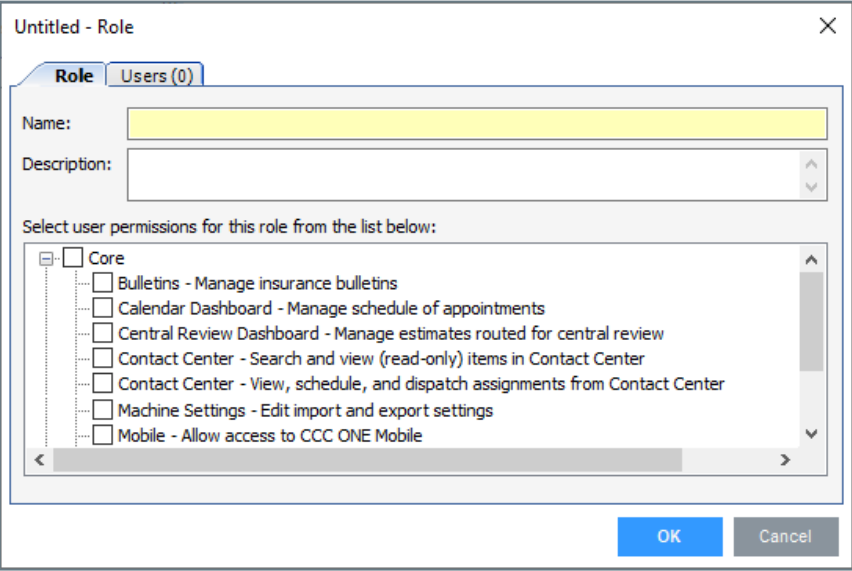
Step	Action
4	<p>The New Role (or existing Role) window opens.</p> <p>The window defaults to the Role tab. This tab is reviewed in the next section of this job aid.</p>  <p>Note: If you had opened an existing Role, the current permissions selected for that role would display.</p>

Using the Role Tab

Introduction This job aid reviews the steps necessary to complete or update the Role tab.

Procedure To create a New Role (or edit an existing Role), information is entered on two tabs (Roles and Users). This table reviews the information needed to complete the Roles tab.

Note: The examples are based on creating a **New** role, but you will use the same procedure to edit an existing role.

Step	Action
1	<p>Enter the Name for the new Security Role into this tab.</p>  <p>The following fields can be completed by entering information in a text box or using the check boxes to select options:</p> <ul style="list-style-type: none"> • Name • Description • User Permissions: Use the plus/minus links to maximize or minimize Permissions Groups. Use the check boxes to select specific Permissions within each Group. <p>Note: Required Fields are indicated by a yellow background.</p>
2	Enter a Description if needed.

Continued on next page

Using the Role Tab, Continued

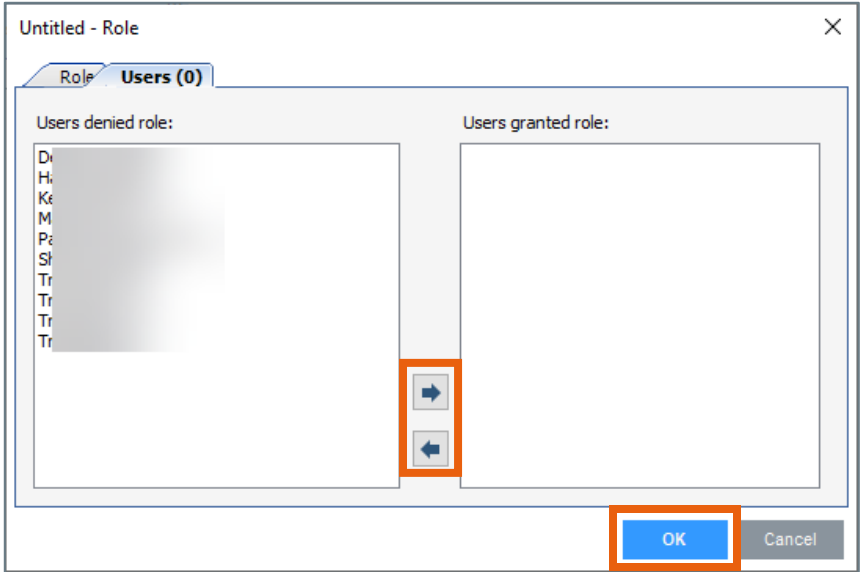
Procedure (continued)

Step	Action
3	<p>Use the menu to select Permissions for this new Security Role or Update existing Permissions.</p> <div data-bbox="565 506 1414 1150" style="border: 1px solid gray; padding: 5px;"> <p>Select user permissions for this role from the list below:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Core <ul style="list-style-type: none"> <input type="checkbox"/> Bulletins - Manage insurance bulletins <input type="checkbox"/> Calendar Dashboard - Manage schedule of appointments <input type="checkbox"/> Central Review Dashboard - Manage estimates routed for central review <input type="checkbox"/> Contact Center - Search and view (read-only) items in Contact Center <input type="checkbox"/> Contact Center - View, schedule, and dispatch assignments from Contact Center <input type="checkbox"/> Correspondence - Create, view, and print correspondence <input type="checkbox"/> Customer Communication - Complete service recovery on hotsheets <input type="checkbox"/> Customer Communication - Send custom text and email replies <input type="checkbox"/> Customer Communication - Send responses to customer surveys <input type="checkbox"/> Customer Contacts - Create, search, view, edit, merge, and delete customer contacts <input type="checkbox"/> Customer Contacts - Search and view (read-only) customer contacts <input type="checkbox"/> Customer Experience Dashboard - Manage customer communications on workfiles <input type="checkbox"/> Diagnostics - Perform diagnostic scans <input type="checkbox"/> Employees - Create, edit, and deactivate user login accounts <input type="checkbox"/> Employees - Create, search, view, edit, and deactivate employees <input type="checkbox"/> ERL Dashboard - View and access Allstate Express Repair Link <input type="checkbox"/> Indicators Dashboards - Provides access to DRP Scorecard and Indicators dashboards <input type="checkbox"/> Invitations - Manage program invites <input type="checkbox"/> Lobby - Administer CCC ONE Lobby settings <input type="checkbox"/> Lobby - Allow access to CCC ONE Lobby <input type="checkbox"/> Machine Settings - Edit import and export settings <input type="checkbox"/> Mobile - Allow access to CCC ONE Mobile </div> <p>A. Selecting the checkbox by a Permission Group Name selects all the permissions under that Group.</p> <p>B. Use the individual checkboxes to select specific permissions under each Group as needed.</p>
4	<p>When you have completed this tab, click the User tab to continue.</p>

Working with the Users Tab

Introduction This job aid reviews the steps necessary to complete or update the Users tab.

Procedure Once the Role has been created or update, you must identify the Users that are allowed to have this Security Role:

Step	Action
1	<p>The system displays all the users on the system in the Users denied role column. Use the arrow keys to move users to the Users granted role column.</p> 
2	<p>Once you have entered all of the information required on both tabs, click the OK button at the bottom of the dialogue box to add (or update) the Security Role.</p>

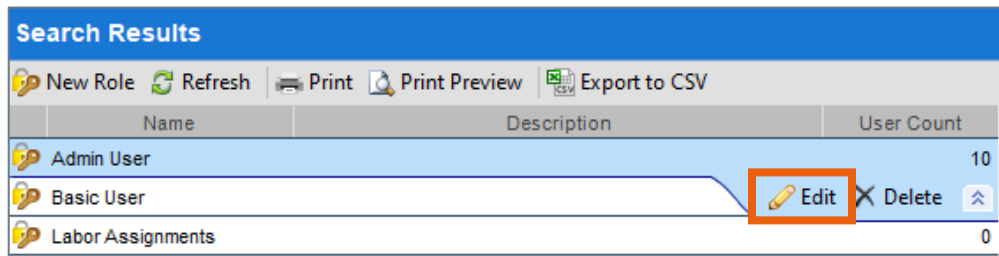
More About Existing Security Roles

Introduction

This job aid provides additional information on working with Security Roles.

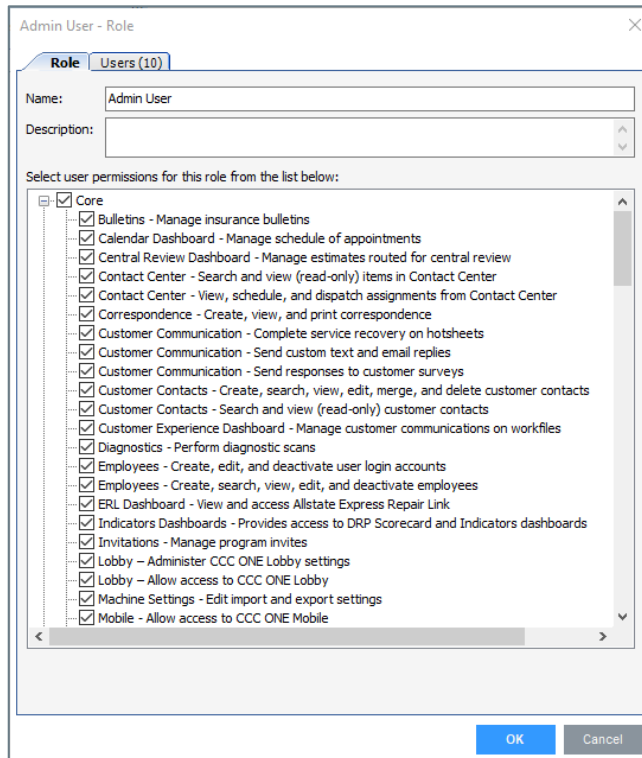
Edit Security Roles

The Admin, Basic, and Labor Assignments Security Roles are the default roles provided with CCC ONE®. The Search Panel displays all existing Security Roles.



Name	Description	User Count
Admin User		10
Basic User		
Labor Assignments		0

Once created, highlight the Security Role to change and then use the Edit link to change the permissions or users associated with the Role.



Admin User - Role

Role Users (10)

Name: Admin User

Description:

Select user permissions for this role from the list below:

- Core
 - Bulletins - Manage insurance bulletins
 - Calendar Dashboard - Manage schedule of appointments
 - Central Review Dashboard - Manage estimates routed for central review
 - Contact Center - Search and view (read-only) items in Contact Center
 - Contact Center - View, schedule, and dispatch assignments from Contact Center
 - Correspondence - Create, view, and print correspondence
 - Customer Communication - Complete service recovery on hotsheets
 - Customer Communication - Send custom text and email replies
 - Customer Communication - Send responses to customer surveys
 - Customer Contacts - Create, search, view, edit, merge, and delete customer contacts
 - Customer Contacts - Search and view (read-only) customer contacts
 - Customer Experience Dashboard - Manage customer communications on workfiles
 - Diagnostics - Perform diagnostic scans
 - Employees - Create, edit, and deactivate user login accounts
 - Employees - Create, search, view, edit, and deactivate employees
 - ERL Dashboard - View and access Allstate Express Repair Link
 - Indicators Dashboards - Provides access to DRP Scorecard and Indicators dashboards
 - Invitations - Manage program invites
 - Lobby - Administer CCC ONE Lobby settings
 - Lobby - Allow access to CCC ONE Lobby
 - Machine Settings - Edit import and export settings
 - Mobile - Allow access to CCC ONE Mobile

OK Cancel

Delete Role

To delete a **Security Role**, highlight it and click the **Delete** link.