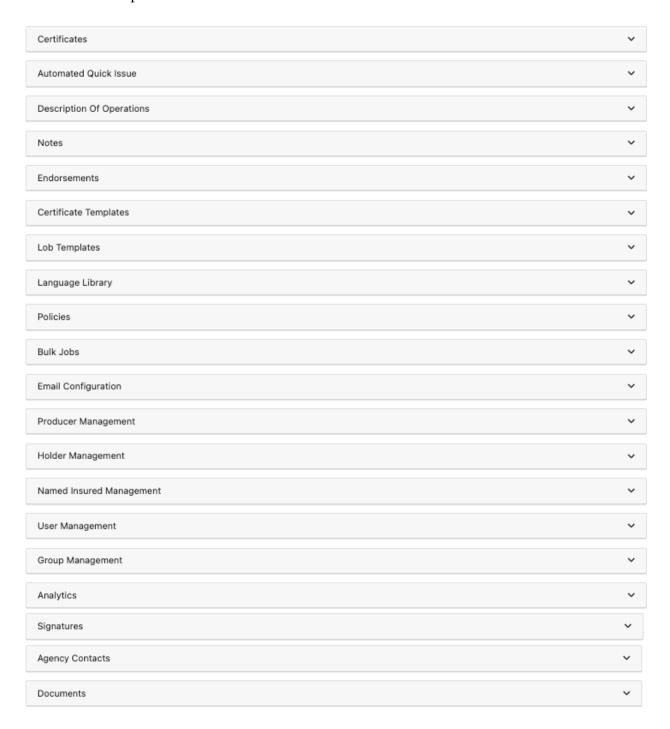# Permission Definitions

The below guide will provide the definitions to the various permissions when creating a Certificate Hero User Permission Group.

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Group Management	⌄
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Agency Contacts	⌄
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Certificates

Set the desired permissions for processing certificates within Certificate Hero.

- Access
  - Permits the User to access the Certificate Manager to view the certificates.
- Create
  - Permits the User to create and/or modify a certificate, depending upon which ACORD Form(s) the agency permits.
- Create from Sample COI
  - Permits the User to start the certificate by uploading a Sample COI.
- Create from Contract
  - Permits the User to start the certificate by uploading a contract for parsing.
- Create from Insurance Clause
  - Permits the User to start the certificate by copying and pasting insurance clause or requirements for parsing.
- Import and Export
  - Permits the User to Import and Export certificates/holders.
- Send Email
  - Permits the User to distribute certificates from within Certificate Hero via email.
- Send Fax
  - Permits the User to distribute certificates from within Certificate Hero via fax.

Automated Quick Issue

Set the permissions that will enable the User to view and configure Insured configuration within Certificate Hero.

- Access
  - Permits the User to view the AQI Requests page.
- Configure
  - Permits the User to configure a new Insured, and edit an existing Insured, for Automated Quick Issue.

Description of Operations

Set the permission for adding verbiage to the certificates while processing certificates within Certificate Hero.

- Create
  - Permits the User to edit the Description of Operations on a certificate.

Notes

Set the permissions that will enable a User to view and/or create Insured and/or Certificate Notes while processing certificates within Certificate Hero.

- Insured Notes Access
  - Permits the User to view Insured notes.
- Insured Notes Create
  - Permits the User to add/edit the existing Insured notes.
- Certificate Notes Access
  - Permits the User to view Certificate notes.

- Certificate Notes Create
    - Permits the User to add Certificate notes.

Endorsements

Set the permissions that will enable the level of access the User has when viewing, creating and/or deleting endorsement forms within the endorsement form library, and insured endorsements.

- Access
    - Permits the User access to the Endorsement Manager.
- Create
    - Permits the User to create new and modify existing Insured endorsements.
- Delete
    - Permits the User to delete an existing Insured endorsement.
- Form Access
    - Permits the User access to the Endorsement Form Manager.
- Form Create
    - Permits the User to create new and modify existing endorsements forms.
- Export Form Details
    - Permits the User to export details of the endorsement forms.
- Edit Form Name
    - Permits the User to edit an endorsement form name.
- Tags Allowed
    - Permits the User to use endorsement tags within the Endorsement Form Manager.
- Tags Editable
    - Permits the User to edit existing endorsement tags within the Endorsement Form Manager.

Certificate Templates

Set the permissions for the COI Template manager within Certificate Hero.

- Access
    - Permits the User to view the existing certificate templates.
- Create
    - Permits the User to create new certificate templates.
    - Permits the User to select which ACORD Forms for which they can create templates.
- Quick Issue
    - Permits the User access to quick issue from an existing certificate template.

LOB (Line of Business) Templates

Set the permissions that will enable the level of access the User has when viewing, creating and/or deleting LOB Templates

- Access
    - Permits the User access the LOB Profiles Manager and access the LOB Profiles while processing certificates.
- Create
    - Permits the User to create, edit, deactivate and set LOB profiles as default.
- Delete

- o Permits the User to delete existing LOB profiles from the manager.

Language Library
Set the permissions that will enable the level of access the User has when viewing, creating and/or deleting Language Library Templates.
- Access
  - o Permits the User to access the DOO Language Library.
- Create
  - o Permits the User to create new, and exit existing, Language Library templates.
- Delete
  - o Permits the User to delete existing Language Library templates.

Policies
Set the permissions that will enable the level of access the User has to import policies and edit specific policy details within Certificate Hero.
- Access
  - o Permits the User to access the policies manager.
- Create
  - o Permits the User to import new, and exit existing, imported policies.

Bulk Jobs
Set the permissions that will enable the level of access the User has for Bulk Jobs within Certificate Hero.
- Access
  - o Permits the User to access the Bulk Jobs.
- Create Revisions
  - o Permits the User to perform a Bulk Revision.
- Create Renewals
  - o Permits the User to perform a Renewal.

Email Configuration
Set the permissions that will enable the level of access the User has to create global outbound email templates for outbound Certificate Hero emails.
- Access
  - o Permits the User to access the email templates.
- Create
  - o Permits the User to revise the email templates.

Producer Management
Set the permissions that will enable the level of access the User has to the Producer Library.
- Access
  - o Permits the User to view the existing producers in the producer library.
  - o Permits the User to select a holder from the Holder Library when processing certificates or creating certificate templates.
- Create

- o Permits the User to create, modify, deactivate and activate producers within the producer library.

Holder Management
Set the permissions that will enable the level of access the User has to the Holder Library.
- Access
  - o Permits the User to view the Holder Library.
  - o Permits the User to select a holder from the Holder Library when processing certificates or creating certificate templates.
- Create
  - o Permits the User to create, modify, deactivate and activate holders within the Holder Library.
- Delete
  - o Permits the User to delete existing holders from the Holder Library.

Named Insured Management
Set the permissions that will enable the level of access the User has to the Named Insured Library.
- Access
  - o Permits the User to view the Insured's additional named insureds in the Named Insured Library.
  - o Permits the User to select an Insured's additional named inured from the Named Insured Library when processing certificates.
- Create
  - o Permits the User to create, modify, deactivate and activate an Insured's additional named insureds within the Named Insured Library.
- Delete
  - o Permits the User to delete an Insured's existing additional named insureds from the Named Insured Library.

User Management
Set the permissions that will enable the user to access the Users manager.
- Access
  - o Permits the User to access the agency's list of users.
- Create
  - o Permits the User to create new, or modify existing, users.

Group Management
Set the permissions that will enable the user to access the Groups manager.
- Access
  - o Permits the User to access the agency's list of user permission groups.
- Create
  - o Permits the User to create new, or modify existing, user permission groups.

Analytics
Set the permission for accessing the agency's Certificate Hero Analytics.
- Permits the User to view certificate processing analytic reports for the agency.

Signatures

Set the permissions that will enable the level of access the User has to the Signatures manager.

- Access
    - Permits the User to view the existing signatures in the Signature Library.
    - Permits the User to select a signature from the Signature Library when processing certificates.
- Create
    - Permits the User to create, modify, deactivate and activate signature within the Signature Library.
- Delete
    - Permits the User to delete existing signature from the Signature Library.

Agency Contacts

Set the permissions that will enable the level of access User has to the Agency Contacts menu.

- Access
    - Permits the User to view the existing Agency Contacts in the Agency Contacts Library.
    - Permits the User to select an Agency Contacts from the Agency Contacts Library when processing certificates
- Create
    - Permits the User to create, modify, deactivate and activate Agency Contacts within the Agency Contacts Library.
- Delete
    - Permits the User to delete existing Agency Contacts from the Agency Contacts Library.

Documents

Set the permissions that will enable the level of access User has to the Documents menu.

- Access
    - Permits the User to view the existing certificate processing supporting Documents within the Documents Manager.
    - Permits the User to view the various documents when processing certificates.
- Create
    - Permits the User to create, modify, deactivate and activate documents from within the Documents Manager.
- Delete
    - Permits the User to delete existing documents from the Documents Manager.