



POWERING
YOUR
POSSIBLE.

SIRCON FOR CARRIERS

**User Security &
Administration in
Producer Central**

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Overview

Introduction and Background

Producer Central has built-in security measures to control user access. User security is based on roles, which are collections of permissions to view or update information in Producer Central. User roles grant users access to different types of system data, including:

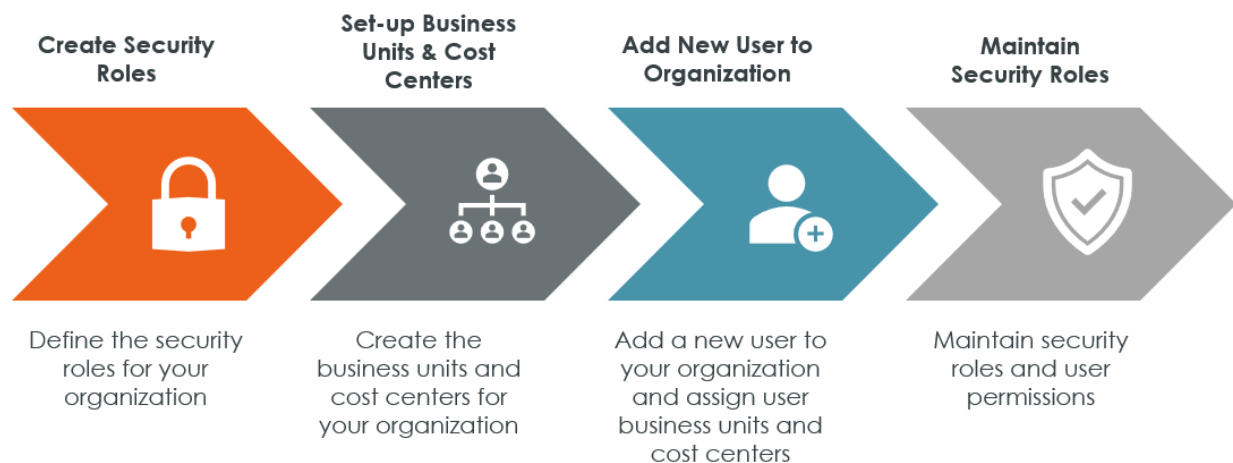
- Pages in Producer Central
- Fields in the Producer Records
- Access to transactions (such as Maintaining Appointments or Data Reconciliations)

Each user is assigned to one or multiple roles. The combined permissions determine the user's rights and privileges in the system.

Much of the role-based security in Producer Central deals with limiting a user's access to one or multiple pages in the system. For example, you can restrict a user with the Licensing Specialist Role, from adding new staff members to your organization.

Similarly, a user in an administrator role may be unconcerned from a business standpoint about producer licensing, and so the administrator role can be set up to disallow access to the *Submit Producer License Application* page.

User Administration Process



Before you can assign security roles to users, you must first create the security roles for your organization. Vertafore pre-configures three security roles for all deployments of Producer Central: Administrator, Licensing Specialist, and View Only. Additional roles need to be configured by a user with administrative privileges.

Section: Overview

After you set up the roles, you will need to add staff members as users to your organization. All users need to be assigned at least one security role and business unit.

What will be covered?

In this guide, we will cover how to create and maintain security roles in Producer Central. We will also cover the process of adding new users to Producer Central and maintaining staff member system access.

Who should use this document?

Users with administrative access that are responsible for user administration and security of Producer Central.

When should you use this document?

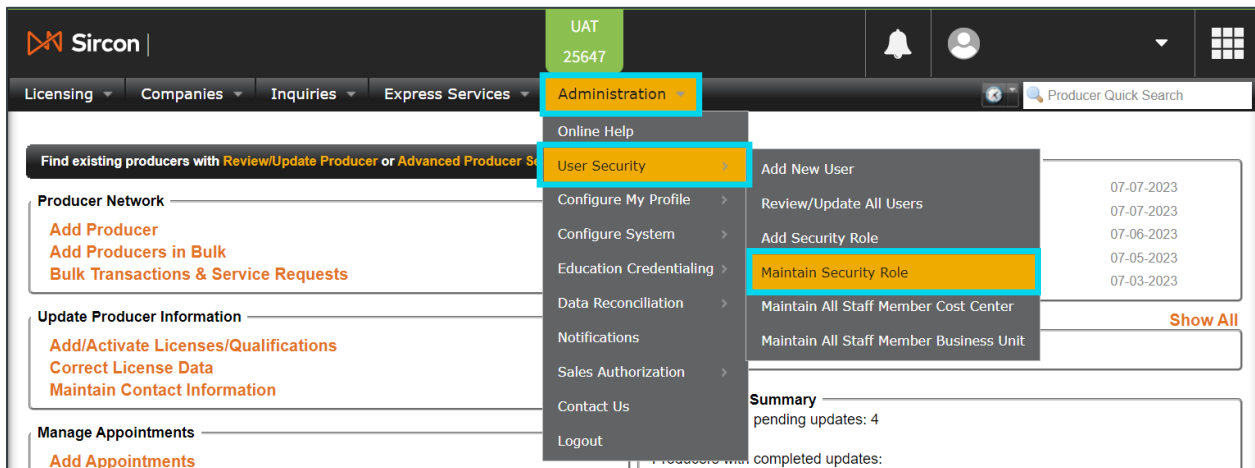
Use this document when you need to:

- Add new security roles
- Modify existing security roles
- Review security roles
- Add new staff members to Producer Central
- Add security roles to a user
- Remove security roles from an existing user
- Change a password in Producer Central for an existing user

Maintain Security Roles

If you have system administrator permissions, use the *Maintain Security Role* page to add permissions to or remove permissions from an existing security role, thereby allowing or denying access to data or system functions for users assigned to the role.

1. From the **Administration** menu, click **User Security** then click **Maintain Security Role**.















The screenshot shows the Vertafore Administration interface. The 'Administration' menu is open, and 'User Security' is selected. The 'Maintain Security Role' option is highlighted in the sub-menu. The background shows a 'Producer Network' section with options like 'Add Producer' and 'Bulk Transactions & Service Requests'.


2. You will now see the *Select Security Role* page and you can see a list of all the security roles created in your organization.
3. Vertafore pre-configures three security roles for all deployments of Producer Central: **Administrator**, **Licensing Specialist**, and **View Only**. All other roles in this page were created specifically for your organization.
4. To review or modify the specific permissions within a role, click the **Edit** button (✎) next to the role you need to update.

Select Security Role

Below is a list of configured security roles.

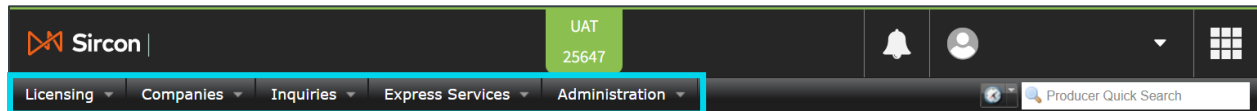
[Add Security Role](#)

Role Name	Role Description	Actions
ADMIN	Administrator	
name1	Details name	
ModifySSN	Grants user the ability to modify SSN values on individual producers	
LICSPEC	License Specialist	
SSNTest	SSN Test	
UW	Underwriter Sales Auth	
VECS	Vertafore Enterprise Customer Service	
VertOuts	Vertafore Outsourcing	
VSECAD	Vertafore Security Administrator	
VCUSTAD	Vertafore Support - Customer/Settings Administrator	
View Only	View Only	
New	new Demo	

Key:  = Edit Security Role

Section: Maintain Security Roles

5. You will now see the *Maintain Security Role* page. This displays the names of all active security roles currently configured in the system.
6. Permissions are grouped by the top-level menus of Producer Central and sorted alphabetically. Permissions within each grouping also are sorted alphabetically.



7. To enable security permissions, click the checkmark to the left of the permission name of the selected security role.
8. To disable security permissions, leave the checkbox blank for the selected security role.

Note: To make navigating through the page easier, use the browser's Find utility. Press **CTRL + F**, and then in the **Find** field enter a keyword relating to a permission you are looking for. Click the **Next** button to highlight occurrences of the keyword on the page.

Maintain Security Role

Role Name: VCUSTAD **Role Description:** Vertafore Support - Customer/Settings Administrator

Select the accessible features for this role within the Producer Licensing module.

Producer Licensing

- Administration
 - Configure My Profile
 - Maintain Staff Member Business Unit
 - Maintain Staff Member Cost Center
 - Review/Update User
 - Configure System
 - Add Hierarchy Templates
 - Administer Producer Business Rules
 - Locations and Departments
 - Maintain Business Unit
 - Maintain Business Unit Cost Center
 - Maintain Codes
 - Maintain Hierarchy Levels
 - Maintain Hierarchy Templates
 - View Code Use Indicators
 - Contact Us
 - Contact Us
 - Data Reconciliation
 - Maintain Data Reconciliation Profiles
 - Maintain Disabled States
 - Education Credentialing
 - Add Education Credentials
 - Add a Program
 - Course List
 - Credential Programs
 - Education Credentials

Section: Maintain Security Roles

9. Permissions pertaining to fields in the *Details* data section offer the following additional controls:
- **Modifiable:** Click the radio button to allow users assigned to the selected security role to update the data in the field.
 - **View Only:** Click the radio button to allow users assigned to the selected security role only to view the data in the field.
 - **Hidden:** Click the radio button to hide the field from users assigned to the selected security role.
10. When you finish updating the fields, click the **Finish** button to save the role permissions.

<input checked="" type="checkbox"/>	View Individual Required Items	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
<input checked="" type="checkbox"/>	View Individual Resident States	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
	Certification Effective Date	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
	Certification Expiration Date	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
	License Expiration Date	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
<input checked="" type="checkbox"/>	View Individual State Producer Number						
<input type="checkbox"/>	View Individual Third Party Certifications						
<input checked="" type="checkbox"/>	View Producer Business Rules						
<input checked="" type="checkbox"/>	View Professional Liability						
<input checked="" type="checkbox"/>	View Securities Information						
<input checked="" type="checkbox"/>	View Transaction History						
	Tracking ID	<input checked="" type="radio"/>	Modifiable	<input type="radio"/>	View Only	<input type="radio"/>	Hidden
Sales Authorization							
<input checked="" type="checkbox"/>	Carrier Requests						
<input checked="" type="checkbox"/>	Maintain Carrier Requests						
<input checked="" type="checkbox"/>	Sales Authorization History						
<input checked="" type="checkbox"/>	Verify Sales Authorization						
							<input type="button" value="Finish"/> <input type="button" value="Return"/>

11. You will return to the *Select Security Role* page.

Select Security Role

Below is a list of configured security roles.

Role Name	Role Description	Actions
ADMIN	Administrator	
APPTSPC	Appointment Specialist	
name1	Details name	
ModifySSN	Grants user the ability to modify SSN values on individual producers	
LICSPEC	License Specialist	
SSNTest	SSN Test	
UW	Underwriter Sales Auth	
VECS	Vertafore Enterprise Customer Service	
VertOuts	Vertafore Outsourcing	
VSECAD	Vertafore Security Administrator	
VCUSTAD	Vertafore Support - Customer/Settings Administrator	
View Only	View Only	
New	new Demo	

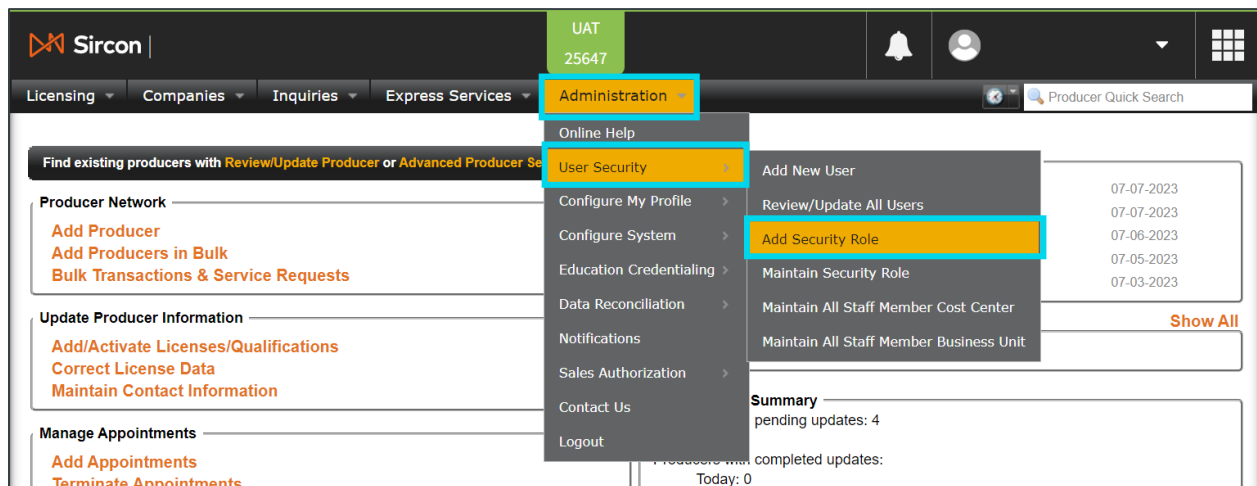
Key: = Edit Security Role

Add Security Role

If you have system administrator permissions, use the *Add Security Role* page to configure a new security role to assign users.

Note: We do not recommend modifying the Administrator role. Instead, you can use this role to create additional roles by copying permissions from the Administrator role.

1. From the **Administration** menu, click **User Security** then click **Add Security Role**.



2. Enter the **Role Name** of a new security role. It must not duplicate the name of an existing security role. Maximum 10 characters.
3. Enter the **Role Description** of the new security role.
4. If you have an existing role with permissions similar to the role you are creating, select the existing role from the **Copy Permission From** list.
5. Click **Next**.

Add Security Role

Role Name

Role Description

If you have an existing role with permissions similar to the role you are creating, select the existing role from the list below to copy the existing permissions. Click Next to modify the copied permissions. Select nothing in the list and click Next to design a new set of permissions.

Copy Permissions From

Section: Add Security Role

6. You will now see the *Maintain Security Role* page.
7. To enable security permissions, click the checkmark to the left of the permission name of the selected security role.
8. To disable security permissions, leave the checkbox blank for the selected security role.

Maintain Security Role

Role Name: APPTSPC
Role Description: Appointment Specialist

Select the accessible features for this role within the Producer Licensing module.

Producer Licensing

Administration

Configure My Profile

- Maintain Staff Member Business Unit
- Maintain Staff Member Cost Center
- Review/Update User

Configure System

- Add Hierarchy Templates
- Administer Producer Business Rules
- Locations and Departments
- Maintain Business Unit
- Maintain Business Unit Cost Center
- Maintain Codes
- Maintain Hierarchy Levels
- Maintain Hierarchy Templates
- View Code Use Indicators

Contact Us

- Contact Us

Data Reconciliation

- Maintain Data Reconciliation Profiles
- Maintain Disabled States

9. When you finish updating the fields, click the **Finish** button to save the role permissions.

- View Individual Required Items
- View Individual Resident States
 - Certification Effective Date Modifiable View Only Hidden
 - Certification Expiration Date Modifiable View Only Hidden
 - License Expiration Date Modifiable View Only Hidden
- View Individual State Producer Number
- View Individual Third Party Certifications
- View Producer Business Rules
- View Professional Liability
- View Securities Information
- View Transaction History
 - Tracking ID Modifiable View Only Hidden

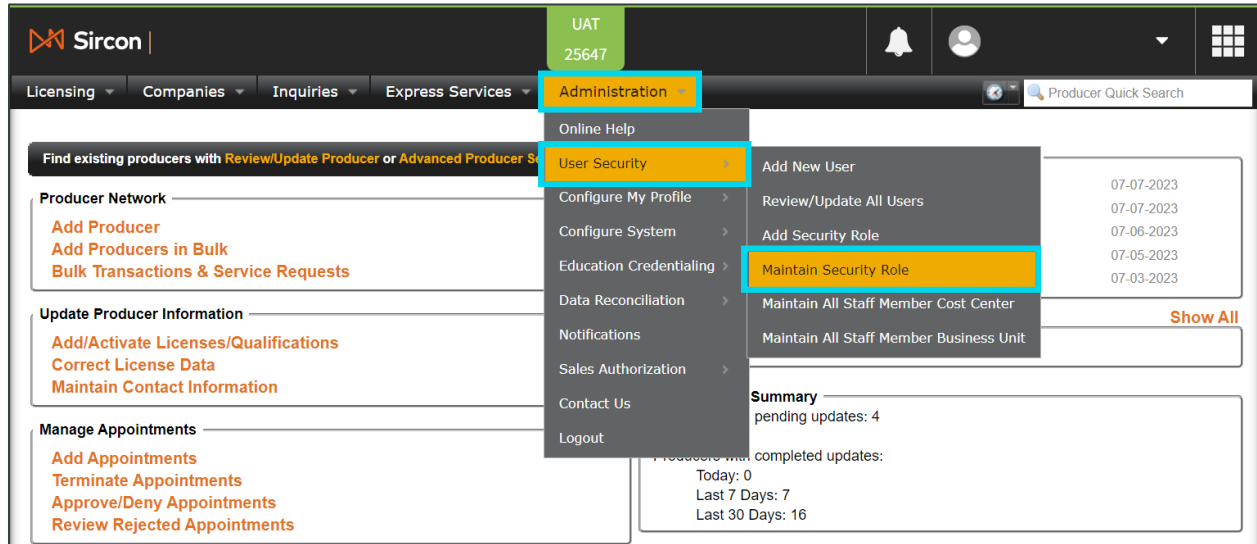
Sales Authorization

- Carrier Requests
- Maintain Carrier Requests
- Sales Authorization History
- Verify Sales Authorization

Finish
Return

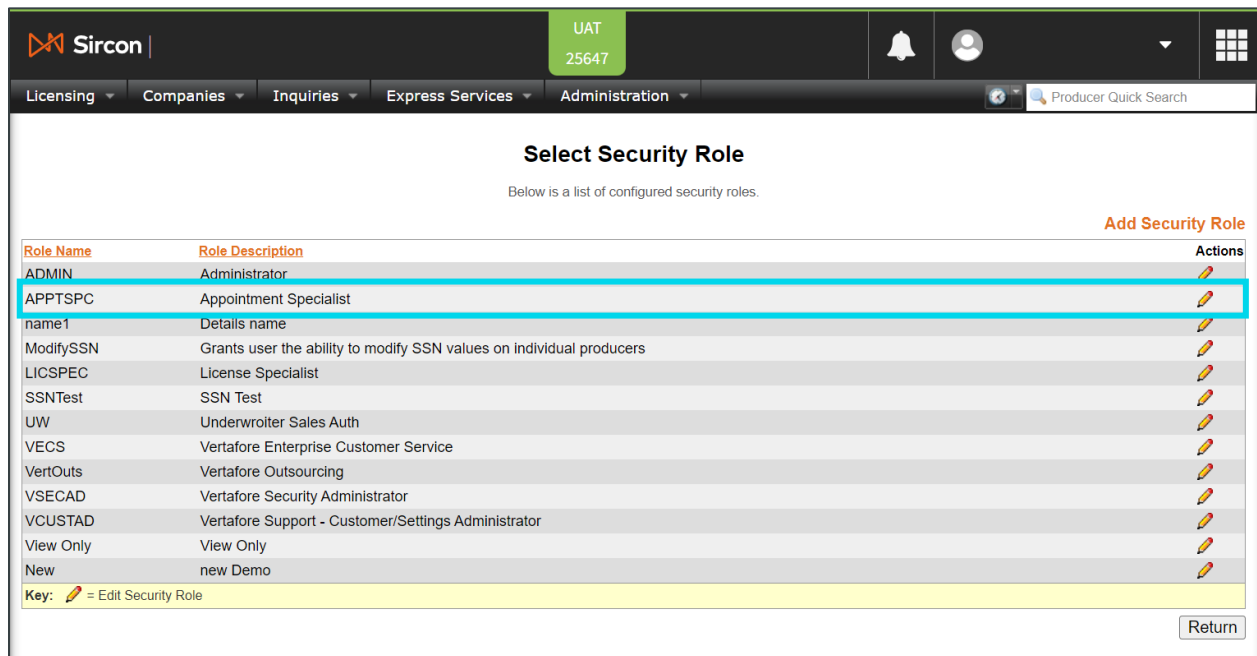
Section: Add Security Role

10. You will return to the home page of Producer Central. To see the new role, click **Administration > User Security > Maintain Security Role**.



The screenshot shows the Sircon application interface. The top navigation bar includes 'Administration' and 'User Security'. The 'User Security' dropdown menu is open, and 'Maintain Security Role' is highlighted. The main content area shows a list of users with columns for 'Name', 'Last Update', and 'Status'. The 'Maintain Security Role' option is highlighted in the dropdown menu.

11. The role will appear in the *Select Security Role* page.



The screenshot shows the 'Select Security Role' page. Below the title, there is a list of configured security roles. The 'APPTSPC' role is highlighted. The table below shows the details of the roles.

Role Name	Role Description	Actions
ADMIN	Administrator	
APPTSPC	Appointment Specialist	
name1	Details name	
ModifySSN	Grants user the ability to modify SSN values on individual producers	
LICSPEC	License Specialist	
SSNTest	SSN Test	
UW	Underwriter Sales Auth	
VECS	Vertafore Enterprise Customer Service	
VertOuts	Vertafore Outsourcing	
VSECAD	Vertafore Security Administrator	
VCUSTAD	Vertafore Support - Customer/Settings Administrator	
View Only	View Only	
New	new Demo	

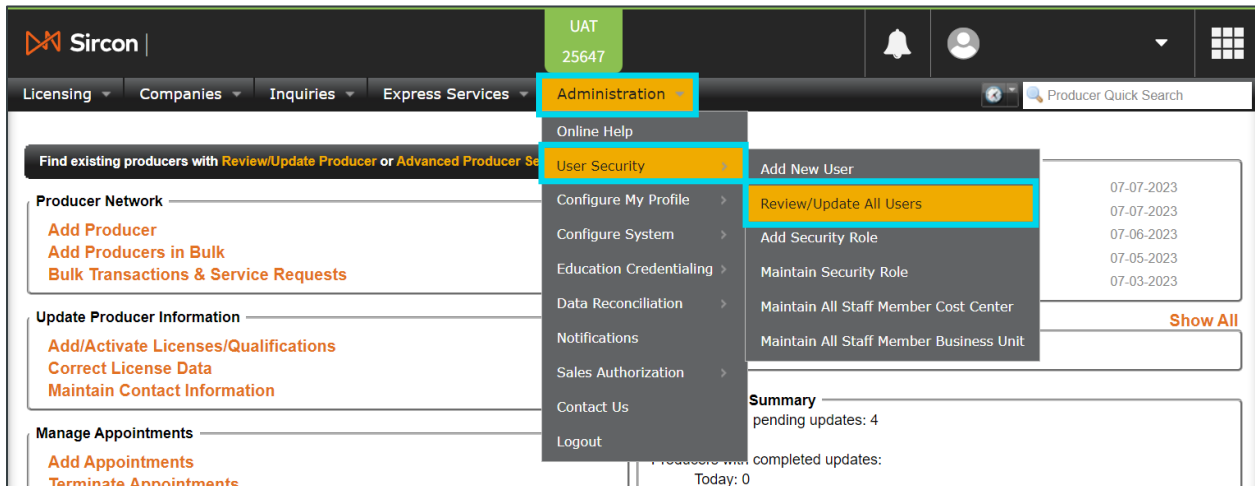
Key: = Edit Security Role

[Return](#)

Review/Update All Users

If you have system administrator permissions, use the *Review/Update User* page to review and modify a user's account information and reset the user's password.

1. From the **Administration** menu, click the **User Security** option then click **Review/Update All Users**.



The screenshot shows the Siron system interface. The 'Administration' menu is open, and the 'User Security' option is selected. Within the 'User Security' submenu, the 'Review/Update All Users' option is highlighted. The background shows various system navigation options like 'Licensing', 'Companies', and 'Inquiries'.

2. You will now see the *Select User Profile* page. You will see a list of all the staff members that were added to Producer Central. In the table below, you will see the following fields:
 - **Staff Member:** Displays the name of the staff member.
 - **User Name:** Displays the user's non-modifiable login name.
 - **Status:** Displays the status of the user's account, either **Active** or **Inactive**.
 - **Phone:** Displays the staff member's phone number.
 - **Ext:** Displays the extension of the phone number, if applicable.
3. Click the **Staff Member** name to edit the user's details.

Select User Profile

Select a User's Profile to edit by clicking the staff member name link below.

Filter Criteria

Staff Member	User Name	Status	Phone	Ext	
Admin, Comp	CompAdmin	Inactive	888-777-6665		Change Password
Administrator, SIRCON	siron	Active	516-555-1212		Change Password
Analyst, Comp	CompAnalystUAT	Active	990-200-6535	91	Change Password
Analyst, Comp	CompAnalyst	Active	990-800-2535		Change Password
Analyst, UAT	UATAnalyst	Active	122-566-8765		Change Password

Section: Review/Update All Users

4. You will now see the *Review/Update User* page.

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title			Begin Date	End Date
<input type="text" value="sircon"/>			<input type="text" value="03-22-2010"/> <small>Calendar</small>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address	
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>	
Employee Type	Assigned Staff Member ID			
<input type="text" value="Employee"/>	<input type="text"/>			

Security

Security Roles	Maintain User Security				
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Security Role</th> <th style="text-align: left;">Description</th> </tr> </thead> <tbody> <tr> <td>ADMIN</td> <td>Administrator</td> </tr> </tbody> </table>	Security Role	Description	ADMIN	Administrator	
Security Role	Description				
ADMIN	Administrator				

[Maintain Cost Centers](#)
[Maintain Business Units](#)

5. From this page, you can update the following details:

- **Staff Member Details**
 - **First** – User's first name
 - **Middle** – User's middle name
 - **Last** – User's last name

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

- **Employment Information**
 - **Title** – Review or update the user's position title.
 - **Begin Date** – *Required*. Review or update the date the user account became active. Defaults to the current date. You may overwrite the date to any prior to the current date using the MMDDYYYY date format or, click the **Calendar** button (📅) to open a popup calendar where you can select a date.
 - **End Date** – The **End Date** field is used to inactivate a user if they no longer need access to Producer Central. Enter a date in this field using the MMDDYYYY date format. Or click the **Calendar** button (📅) to open a popup calendar where you can select a date.

Section: Review/Update All Users

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title		Begin Date	End Date
<input type="text" value="sircon"/>		<input type="text" value="03-22-2010"/>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>
Employee Type	Assigned Staff Member ID		
<input type="text" value="Employee"/>	<input type="text"/>		

Security

Security Roles	Maintain User Security				
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Security Role</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>ADMIN</td> <td>Administrator</td> </tr> </tbody> </table>	Security Role	Description	ADMIN	Administrator	
Security Role	Description				
ADMIN	Administrator				

[Maintain Cost Centers](#)
[Maintain Business Units](#)

- **Phone Number** – Review/update the user's main phone number.
- **Ext** – Review/update the user's extension, if applicable.
- **Fax Number** – Review/update the user's fax number, if applicable.
- **Email Address** – Review/update the user's email address.
- **Employee Type** – Review/update the user's employee type.
- **Assigned Staff Member ID** – Review/update the user's assigned staff member ID, if applicable.

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title		Begin Date	End Date
<input type="text" value="sircon"/>		<input type="text" value="03-22-2010"/>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>
Employee Type	Assigned Staff Member ID		
<input type="text" value="Employee"/>	<input type="text"/>		

- **Security**
 - **Security Roles** – Lists all the security roles that are assigned to the user.

Note: Click the **Maintain User Security** link to modify the user's security role.

Note: Use the **Maintain Cost Centers** link or the **Maintain Business Units** link if you need to update the user's configuration.

6. After you finish updating the user, click **Save**.

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title			Begin Date	End Date
<input type="text" value="sircon"/>			<input type="text" value="03-22-2010"/>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address	
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>	
Employee Type	Assigned Staff Member ID			
<input type="text" value="Employee"/>	<input type="text"/>			

Security

Security Roles	Maintain User Security				
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Security Role</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>ADMIN</td> <td>Administrator</td> </tr> </tbody> </table>	Security Role	Description	ADMIN	Administrator	
Security Role	Description				
ADMIN	Administrator				

Maintain Cost Centers

Maintain Business Units

Change User's Password

If a user in your organization cannot log into Producer Central, you have the option to create a generic temporary password so that they can log in and change their password.

1. From the *Review/Update User* page, click the **Change Password** link.

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

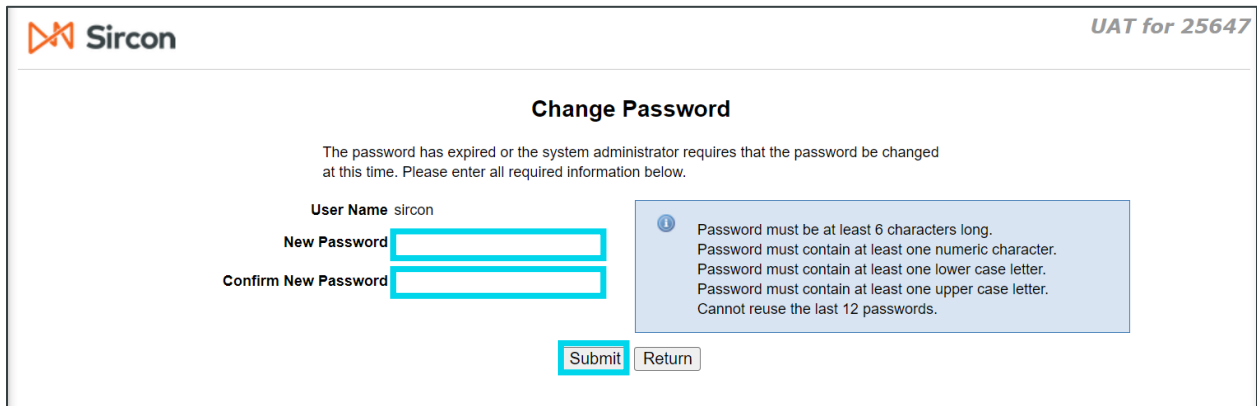
Title			Begin Date	End Date
<input type="text" value="sircon"/>			<input type="text" value="03-22-2010"/>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address	
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>	
Employee Type	Assigned Staff Member ID			
<input type="text" value="Employee"/>	<input type="text"/>			

Section: Review/Update All Users

2. Type the **New Password** and then **Confirm New Password**.
3. It is recommended that you use a generic password that is simple and easy to change, such as Password1.

Note: The password must be at least 6 characters long with at least one numeric character, one lower case letter, and one upper case letter.

4. Click **Submit**.



The screenshot shows the Sircon user interface for changing a password. At the top left is the Sircon logo, and at the top right is the text "UAT for 25647". The main heading is "Change Password". Below this, a message states: "The password has expired or the system administrator requires that the password be changed at this time. Please enter all required information below." The form includes a "User Name" field with the value "sircon". There are two password input fields: "New Password" and "Confirm New Password", both highlighted with red boxes. To the right of these fields is a blue information box containing the following requirements: "Password must be at least 6 characters long.", "Password must contain at least one numeric character.", "Password must contain at least one lower case letter.", "Password must contain at least one upper case letter.", and "Cannot reuse the last 12 passwords." At the bottom of the form are two buttons: "Submit" (highlighted with a red box) and "Return".

5. You can send the **New Password** to the users and instruct them to change their password.

Note: Users can follow the steps in the [Sircon Business Account Login Quick Guide](#) to change their password and login to Producer Central.

Maintain User Security

Follow these steps to add or remove security roles from a user's profile.

1. From the *Review/Update User* page, click the **Maintain User Security** link.

Review/Update User

Staff Member Details

User Name : sircon (Change Password) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title			Begin Date	End Date
<input type="text" value="sircon"/>			<input type="text" value="03-22-2010"/>	<input type="text"/>
Phone Number	Ext	Fax Number	Email Address	
<input type="text" value="5165551212"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="sircondatasecurity@vertafore.com"/>	
Employee Type	Assigned Staff Member ID			
<input type="text" value="Employee"/>	<input type="text"/>			

Security

Security Roles	Description
ADMIN	Administrator

[Maintain User Security](#)

[Maintain Cost Centers](#)
[Maintain Business Units](#)

2. You will now see the *User Security* page. Here you will see checkmarks next to all the roles the user is currently assigned to.
3. Click the checkmark next to each role you need to add to the user.
4. Click **Save**.

User Security

Staff Member	User Name	Phone	Ext	Email Address
Administrator, SIRCON	sircon	516-555-1212		sircondatasecurity@vertafore.com

Select the roles designating this staff member's access rights:

- Administrator
- Appointment Specialist
- Details name
- Grants user the ability to modify SSN values on individual producers
- License Specialist
- SSN Test
- Underwriter Sales Auth
- Vertafore Enterprise Customer Service
- Vertafore Outsourcing
- Vertafore Security Administrator
- Vertafore Support - Customer/Settings Administrator
- View Only
- new Demo

Section: Review/Update All Users

Note: The user's security represents the sum of all the permissions they are granted in all the roles.

For example, the Licensing Specialist role does not allow the user access to the *Maintain Code* page, but the Administrator role does. If the user has both roles assigned to them, they will have access to the *Maintain Code* page through the Administrator role.

- You will return to the *Review/Update User* page. The new role is now available in the **Security** section.

Review/Update User

Staff Member Details

User Name : sircon ([Change Password](#)) * Changes to the password will be made to all Sircon products.

First	Middle	Last	Suffix	Nickname
<input type="text" value="SIRCON"/>	<input type="text"/>	<input type="text" value="Administrator"/>	<input type="text"/>	<input type="text"/>

Employment Information

Title <input type="text" value="sircon"/>	Begin Date <input type="text" value="03-22-2010"/>	End Date <input type="text"/>
Phone Number <input type="text" value="5165551212"/>	Ext <input type="text"/>	Fax Number <input type="text"/>
Employee Type <input type="text" value="Employee"/>	Assigned Staff Member ID <input type="text" value="SIRCON1"/>	
Email Address <input type="text" value="sircondatasecurity@vertafore.com"/>		

Security

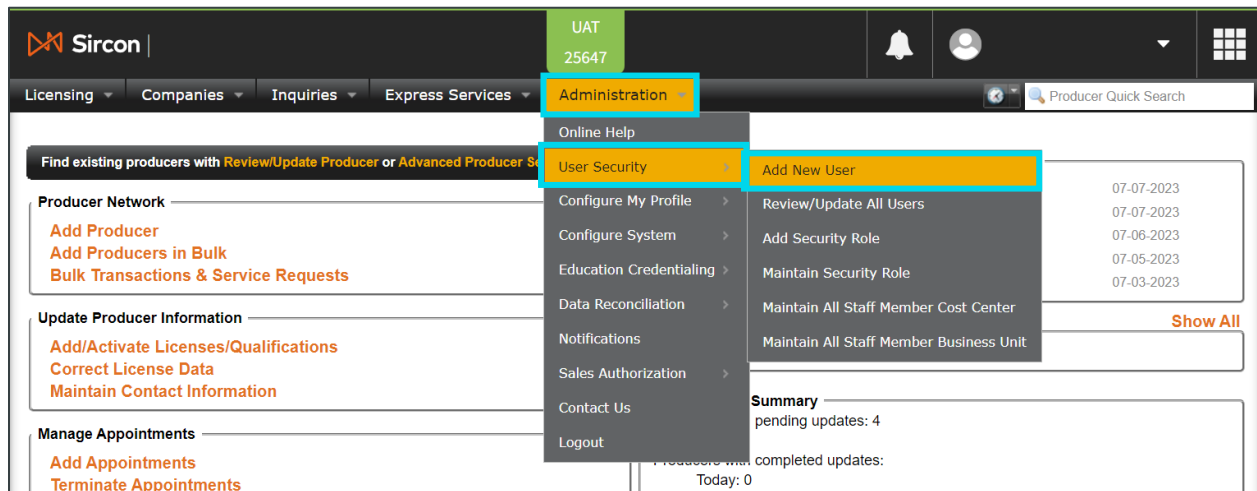
Security Roles	Maintain User Security						
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Security Role</th> <th style="text-align: left;">Description</th> </tr> </thead> <tbody> <tr> <td>ADMIN</td> <td>Administrator</td> </tr> <tr> <td>LICSPEC</td> <td>License Specialist</td> </tr> </tbody> </table>	Security Role	Description	ADMIN	Administrator	LICSPEC	License Specialist	
Security Role	Description						
ADMIN	Administrator						
LICSPEC	License Specialist						

[Maintain Cost Centers](#)
[Maintain Business Units](#)

Add New User

If you have system administrator permissions in Producer Central, use the [Add New User](#) page to create a new Producer Central user account for a staff member.

1. Before you add a new user, follow the steps in the [Review/Update User](#) section to check that the user has not been added to the system.
2. From the **Administration** menu, click **User Security** then click **Add New User**.



3. You will now see the [Add New User](#) page.
4. Enter the details about the user, the following fields are available:

- **Staff Member Details**

- **First** – *Required*. User's first name
- **Middle** – User's middle name
- **Last** – *Required*. User's last name
- **Suffix** – Enter the user's suffix, if applicable.
- **Nickname** – Enter the user's nickname, if applicable.
- **Password** – *Required*. Enter an initial password for the user. Maximum 20 characters. The password must comply with the password strength requirements established in the system based on your company's requirements.
- **Confirm Password** – *Required*. Confirm the password.

- **Employment Information**

- **Title** – Review or update the user's position title.
- **Begin Date** – *Required*. Review or update the date the user account became active. Defaults to the current date. You may overwrite the date to any prior to the current date using the MMDDYYYY date format or, click the **Calendar** button (📅) to open a popup calendar where you can select a date.

Section: Add New User

- **Initial Business Unit** – *Required*. From the dropdown menu, select an initial business unit to assign to the new user.
 - **Phone Number** – *Required*. Review/update the user's main phone number.
 - **Ext** – Review/update the user's extension, if applicable.
 - **Fax Number** – Review/update the user's fax number, if applicable.
 - **Email Address** – *Required*. Review/update the user's email address.
 - **Employee Type** – Review/update the user's employee type.
 - **Assigned Staff Member ID** – Review/update the user's assigned staff member ID, if applicable.
- **Security**
 - **Initial Security Role** – *Required*. From the dropdown menu, select an initial security role that the new user will assume in the system. Each security role is configured to include specific permissions to view or edit specific data or access functions and controls in the system.

5. Click **Save and Review** to add the user.

Add New User

Please enter the following profile information for **TRAINING**:

Staff Member Details

First <input type="text" value="Winnie"/>	Middle <input type="text"/>	Last <input type="text" value="MacTavish"/>	Suffix <input type="text"/>	Nickname <input type="text"/>
Password <input type="password" value="*****"/>	Confirm Password <input type="password" value="*****"/>	Password must be at least 6 characters long. Password must contain at least one numeric character. Password must contain at least one lower case letter. Password must contain at least one upper case letter.		

Employment Information

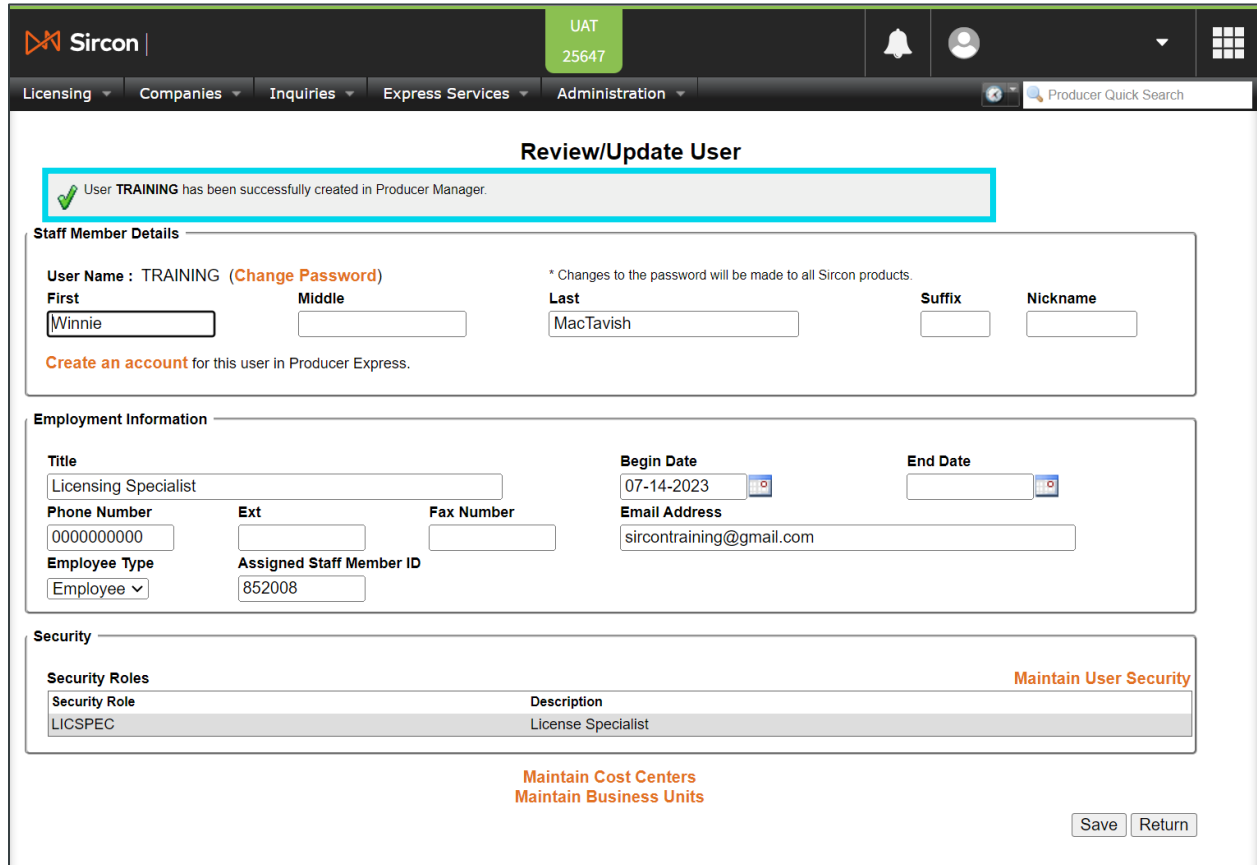
Title <input type="text" value="Licensing Specialist"/>	Begin Date <input type="text" value="07-14-2023"/>	Initial Business Unit <input type="text" value="DEFAULT"/>
Phone Number <input type="text" value="000-000-0000"/>	Ext <input type="text"/>	Fax Number <input type="text"/>
Employee Type <input type="text" value="Employee"/>		Assigned Staff Member ID <input type="text" value="852008"/>
Email Address <input type="text" value="sircontraining@gmail.com"/>		

Security

Initial Role

Section: Add New User

- You will see a message that the user has been successfully created in Producer Central.



Review/Update User

✔ User **TRAINING** has been successfully created in Producer Manager.

Staff Member Details

User Name : TRAINING (Change Password) * Changes to the password will be made to all Siron products.

First: Winnie Middle: Last: MacTavish Suffix: Nickname:

Create an account for this user in Producer Express.

Employment Information

Title: Licensing Specialist Begin Date: 07-14-2023 End Date:

Phone Number: 0000000000 Ext: Fax Number: Email Address: sircontraining@gmail.com

Employee Type: Employee Assigned Staff Member ID: 852008

Security

Security Roles Maintain User Security

Security Role	Description
LICSPEC	License Specialist

Maintain Cost Centers
Maintain Business Units

Save Return

- Send the **Password** to the new user and instruct them to change their password.

Note: Users can follow the steps in the [Siron Business Account Login Quick Guide](#) to change their password and login to Producer Central.

APPENDIX 1: Sircon for Carriers Help Resources

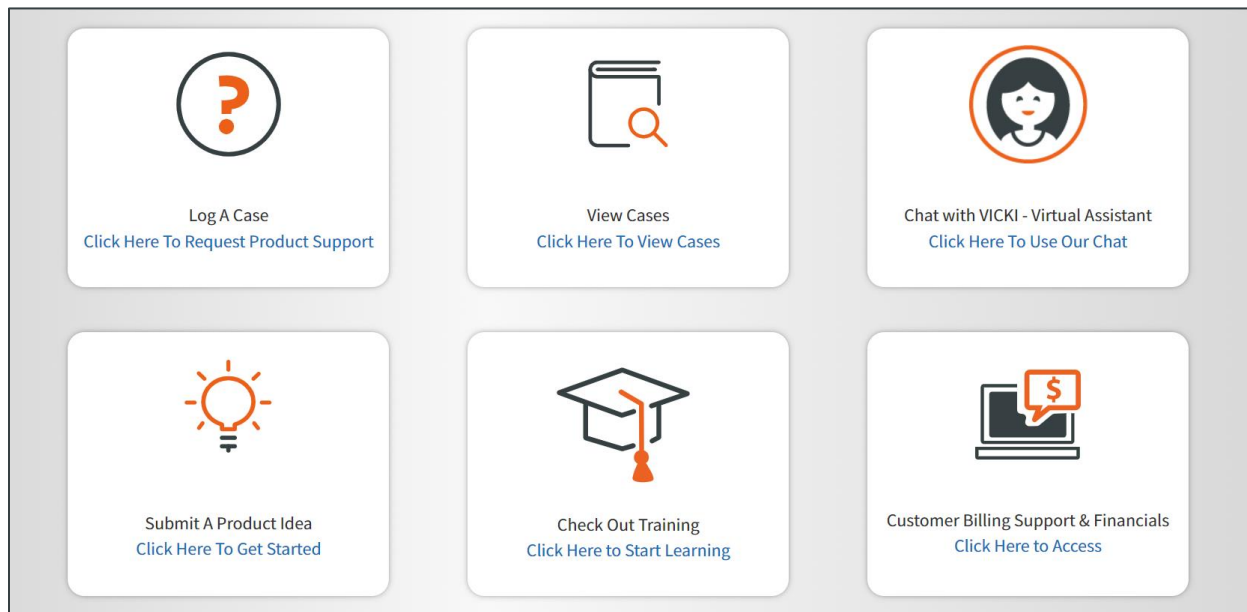
Help is just a click away. Vertafore has two resources available to support you 24/7:

- My Vertafore
- Sircon Support

My Vertafore

My Vertafore is our free online customer support portal and knowledge base. At [My Vertafore](#) you can:

- **Log a Case** – Cases are used to request product support
- **Submit Ideas** – Send Vertafore ideas for new product features or enhancements
- **Search Knowledgebase** – Search for detailed articles on the Sircon Knowledge Base



Note: Sircon does not use the Submit a Product Idea or Chat with VICKI functions.

Contact Vertafore Customer Support

Can't find what you are looking for at My Vertafore? Our Customer Support team is here to help. [Click here to email Support](#) or call 877-876-4430.

APPENDIX 2: Document History

Version	Revision Date	Revision Record
1.0	7/14/2023	Original Document



999 18th St | Denver, CO, 80202 | 877.876.4430 | [Vertafore.com](https://www.vertafore.com)

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