

# BlueCamroo

## User Guide v. 4.0



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# Appendix 1 – Managing Users and Permissions

## Overview

BlueCamroo affords you very precise control over the data that individual Users can see, and what they can do with that data. But if you are working in a small team and need less tight controls, then you also have the choice to operate with more “open” permissions.

All User and Permission setups are contained in the **Users and Groups Setup** section ([Setup](#) | [Users and Groups](#)).

## Users

Everyone in your team that you want to use BlueCamroo needs to be set up as a **User**. (It is possible and permitted for individuals to share a user access, however they will then be sharing the same Task list, Calendar, Inbox etc, so this is rarely convenient.)

**Note:** To ensure data integrity, Users cannot be deleted after they are associated to any records in the system. When Users leave your business, they should simply be marked ‘inactive’. This prevents any log-in by that user, and returns their licence count to the pool for use by other new users.

## User Groups

You may define as many **User Groups** as you wish. Users may be added to as many Groups as you choose, or to none.

There are three default User Groups that are created by BlueCamroo when your Workspace is first set up (these may not be deleted):

- **Expense Approver** – BlueCamroo has a built-in personal expense logging and claim process (see Section 14). Users added to this Group are authorized to approve Expenses for other Users.
- **Expense Payer** – Approved Expense claims will be routed to members of this Group for payment. Members of the Expense Payer Group can mark an expense claim “paid”.

- **System Administrators** – System Administrators have unrestricted permissions to all parts of BlueCamroo, including to the Setup area. (An exception is “To Do Lists”, which are personal to each User).

User Groups are the most convenient method to manage Permissions if you will be running a tightly controlled scheme of permissions.

**Note:** User Groups also support other special functionality, including Billing (see Section 13.2) and Group Tasks (Section 6.6).

The screenshot displays the 'System Setup > User Groups > Managers Group Details' interface. At the top, the 'Group Name' is set to 'Managers'. Under 'Base Information', the 'Group Email' is 'managers@acmedemos.com', 'Default Billing Grade' is 'Consultant', and 'Task Group' is unchecked. The interface features three sections for user selection, each with 'Available Member' and 'Selected Member' lists and '>>'/'<<' buttons. The first section, 'Select which users you would like add to this group', shows 'David' in the available list and 'Helen' and 'Jerry' in the selected list. The second section, 'Select which users can approve/decline expense sheets for members of this group', shows 'Helen' and 'Jerry' in the available list and 'David' in the selected list. The third section, 'Select which users can mark expense sheets paid for members of this group', shows 'Helen' and 'Jerry' in the available list and 'David' in the selected list.

## Permissions

For any user / data combination, BlueCamroo has three levels of Permission:

- **No Access** – The User cannot see or work with the data.
- **View Only** – The User can **View** the Data, but cannot update.
- **Full Access** – The User can **View** and **Add/Update** the data.

Permissions are defined for the whole Organization (all Users of the BlueCamroo workspace); at the User Group level, and at other levels besides. The following sections detail all levels where Permissions may be set.

**Settings at each level override those at the previous level.**

### Level 1 – Company Details

In the **Company Defaults** Setup section, the **Company Details** page includes the first level of Default Access Rights.

Section	Permission Level	Apply to All	Control Individual
Organizations Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
People Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Opportunities Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Projects Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Cases Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Social Scout Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Reports Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Libraries Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Preferences Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>
Recycle Bin Access	Full Access	<input checked="" type="radio"/>	<input type="radio"/>

The drop-downs allow you to set the chosen permission for each Section. Note that if permission is set to **No Access**, the relevant section will not display at all – e.g. if ‘Default Case Access’ is set to **No Access**, there will be no Cases item displayed on the explorer bar, and ‘Cases’ will be removed from other sections’ explorer bars also.

**View Only** and **Full Access** permissions both cause the relevant section to display. If **View Only** is selected, the User will be able to view records to which they have access. If Full Access is selected, the User will be able to create records, and to view and update other records to which they have access.

## IMPORTANT – Understanding Record Access and “Apply to All”

View Only and Full Access permissions give access to view or add/update records **to which each user has access**. By default, this is NOT all records in the particular section. Instead, Users have access to:

- **Records that they own** – i.e. in the individual data record, their User Name is shown in the “Owner” field.
- **Records that a subordinate owns** – If John’s user profile shows Susan is his **Manager**, for example, then Susan will be able to see all data records that she or John own. If John is also Alice’s manager, then John will be able to access his and Alice’s records. Susan will be able to access her own, John’s and Alice’s.
- **Records that are explicitly Shared to them** – see below.

By selecting the ‘Apply to All’ radio options, you can override these default rules, giving users access to **all** data records in each selected section with View Only or Full Access permissions as appropriate.

System Administrators automatically have access to all records.

### Level 2 – User Group

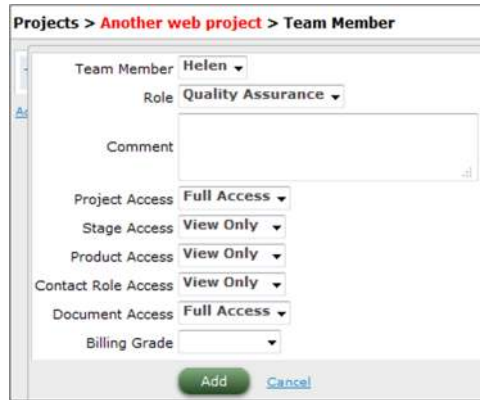
In the Setup page for each User Group, you will find another set of access rules, looking exactly like those above. Any settings you make here will **override** the general company-wide defaults set up at Level 1 – Company Details for all members of the Group.

**Note:** If a User is in multiple groups with different permission levels, BlueCamroo will apply the highest (i.e. most “open”) permissions from all those Groups.

### Level 3 - User

At the individual User level, there is a third set of permissions, again in the same format. Anything set here will override the permissions inherited from the Group and/or Company level. Again, there’s no requirement to set anything at this level if the inherited permissions give the required results.

## Level 4 – Opportunity / Project Role





The User level (Level 3) is the lowest level of Permissions control that applies system-wide. There is one more level of permissions, however, that applies to individual **Opportunities and Projects**. It is possible, by adding Users as Team Members to an Opportunity or a Project, to override their normal permissions, and to control in detail their access to specific sub-sections of the data.

## Sharing Records between Users

As explained in the callout box on page 53 above *IMPORTANT – Understanding Record Access and “Apply to All”*, granting a user Permission to a section of BlueCamroo does not automatically grant access to all the data records in that section. Access to individual records according to the specific rights detailed above, and is modified by creating **Shares**.

**Note:** If you are using the “Apply to all” feature to apply Permission settings to all records in each section, you will have less need to consider Shares, however they may still be used to change the level of access on an individual record, for example to share a Lead with **Full Access** access to a User whose Lead permissions is normally **View Only**.

## Sharing an Individual Data Record

Any User that has Full Access access to a record can **Share** it to other Users and/or User Groups. Select **Settings**  from the toolbar, and then **Shares** .





Group Share Access (0)				
Group	To Organization	To Opportunities	To Projects	To Cases

User Share Access (2)				
User	To Organization	To Opportunities	To Projects	To Cases
David	View Only	Full Access	Full Access	Full Access


Helen ▾ Full Access ▾ Full Access ▾ Full Access ▾ Full Access ▾ Save Cancel

## Mass Share – Sharing a Set of Records at One Time

Instead of sharing data records individually, it is also possible to share a set of records that meet specific criteria. On the Home page, select **Manage Data**  from the toolbar then **Mass Assign Share** .

For further information about using Manage Data to work with groups of records, refer back to Section 16.

## Automating Shares

BlueCamroo also allows you to set rules to automate the creation of Shares. In Setup  **Shared Permissions**, pick the type of data you wish to work with (i.e. Organizations, People, etc.)

Shared Permissions work with User Groups, and allow you to define rules that embody the following logic: **“Whenever a new record is created and the Owner is in Group A, share the record in this way with Group B”**.

The following example, working with Organization Shares, shows how this may be applied to create sophisticated automated sharing rules:

System Setup > Shared Permissions > Organizations

Organization Shares						
Organizations owned by members of Group	Shared with this Group	with:	Organization Access	Opportunity Access	Project Access	Case Access
Managers	Managers		Full Access	Full Access	Full Access	Full Access
Staff	Managers		Full Access	Full Access	Full Access	Full Access
Staff	Staff		View Only	View Only	View Only	View Only

[Add New](#)

With this configuration:

- Any Organization created where the Owner is a **Managers Group** member will share to the **Managers Group** with **Full Access** permission for the Organization and for related Opportunities, Projects and Cases.
- Any Organization created where the Owner is a **Staff Group** member will share to the **Managers Group** with **Full Access** permission.
- Any Organization created where the Owner is a **Staff Group** member will additionally share to the **Staff Group** with **View Only** permission.

**Tip:** Remember that members of the same Group do not automatically share records to one another. It is important to define the share from members of each Group to the same Group if that is the outcome you require.

### BlueCamroo's Top Tips for Managing Permissions

***The fact you can set different permissions for every User doesn't mean you have to!*** Try to set most of your permission controls at the Company or User Group level, so that every new User immediately picks up the correct permissions based on their Group memberships.

It's surprisingly easy to jump in and design complex permission rules that wind up just stopping people from doing their jobs, so **start simple** and develop your permissions structure in small steps as you become more familiar with the system.

