

# BLUE CHAMELEON : Advanced Functions and Configuring : Setting user rights

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# Appendix B

## Setting user rights

Some Blue Chameleon components might be of no use to some users ; what is more, actions they could take (such as deleting, modifying some database elements) from these components might even be detrimental to the whole. In order to regulate access to Blue Chameleon function, users are assessed rights (gathered into main groups, B.3) for every aspect of Blue Chameleon.

Most conveniently, user rights are be accessed via the *Modify User Page* (9.17).

### B.1 User right basics

For each component, rights are defined in two ways : one right for **Owner** and an other for **All**, which are respectively the rights the user has on his/her own things and on all other users' things, all pertaining to this specific component.

Most user rights inside Blue Chameleon can be assessed the one of the following values :

- 'None' : user doesn not even see anything related to this component ;
- 'View' : user only sees this component appear and is able to browse it ;
- 'Modify' : user is able to edit pre-existing data on this component ;
- 'Create/Modify' : the above and user is able to add data there ;
- 'Delete/Create/Modify' : user is able to accomplish any data-related action ;
- 'Unrestricted' : all rights above, adding to that this user is authorized to take actions that are administrator-only.

#### B.1.1 Other kinds of user right values

These levels allow to gradually grant the access to particular objects selectively by users.

### **B.1.1.1 Article ordering**

The 'Article ordering level:' menu contains 'Front-office and back-office level 0', 'Backoffice level 1' to '...level 4' and 'Unrestricted'. Its role is to allow or not users to register orders on certain articles. Indeed, the category page provides a similar menu (3.3.4.2.1) : for articles related to this category to be ordered by a user, this user's right will have to be equal to or higher than the one that is set for the category.

### **B.1.1.2 Privacy access**

The 'Privacy access level' contains values from 'Level 0' to '... 5'. Its role is to rule whether a user has the right to modify/act on certain objects.

The user's privacy access level has to be equal to or higher than the one defined for :

- a property (7.6.2.1), in order for her/him to update it ;
- an document uploaded through the Paperwork manager (7.7), in order for her/him to view or attach other documents to it.

### **B.1.1.3 Commercial access**

The 'Commercial access level:' menu contains 'Level 0' to '... 5' and 'Unrestricted'. Its role is to rule whether users are allowed or not to assess to a client a service level agreement (9.5), which is defined using similar levels.

This user's commercial access level has to be equal to or higher than the ones that are were set for the SLA in order to :

- attribute a SLA to a client while her/his creation (2.1) or modifying (2.2.3) ;
- assess the corresponding ticket priority (8.2.5).

### **B.1.1.4 Financial access**

The 'Financial access level:' menu contains 'Level 0' to '... 5' and 'Unrestricted'. Its role is to rule whether users are allowed or not to modify a credit control class (5.6.6.1), which is defined using similar levels. For a credit control class to be updated, this user's financial access levels will have to be equal to or higher than the ones that are were set for the credit control class.

The multitude of financial access levels enable to really fine-tune the managing of credit control.

## **B.2 Viewing and modifying user rights**

The list of all Blue Chameleon user rights components can be displayed and set in several ways ; for instance, concerning user Tom :

- via the *Modify User Page*, i.e. **General** / **Users** / **Users** : by clicking on the **Modify** button right besides **Tom**, the list of rights as briefly featured at Fig.9.17 is displayed and then can be set individually, for **Owner** and for **All** ;
- or via the dedicated *Modify Right Page* as accessible via **General** / **Users** / **User rights**.

The latter way is more efficient as user rights for all users can be set at the same time. An example of it is given at Fig.B.1 below : there, we select the 'Payment Management' user right from the drop-down menu and upon **Search** click, the current **Owner/All** rights pertaining to payment management are displayed for all users. The 'admin' user is assessed unrestricted rights, while members of the 'Sales Dept.' (Tom, Dick and Harry) and 'Accounting' (Mary and Jane) user groups are assessed the highest rights (Delete/Create/Modify) for a non-'admin' user. By safety, the two remaining users are assessed only view rights.

**General** / **Users** / **User rights** :

**Modify user right**

User right:

User	Owner	All
admin	<input type="text" value="Unrestricted"/>	<input type="text" value="Unrestricted"/>
Dick	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Harry	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
James	<input type="text" value="View"/>	<input type="text" value="View"/>
Jane	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Karen	<input type="text" value="View"/>	<input type="text" value="View"/>
Mary	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>
Tom	<input type="text" value="Delete/Create/Modify"/>	<input type="text" value="Delete/Create/Modify"/>

Figure B.1: For the 'payment management' component, users are assessed different rights according to their role in the company.

### B.3 List of user rights

On the *Modify User Page*, user rights are gathered into different categories, in the following succession :

- the so-called *User rights* : (B.3.1) ;
- *Menu script user rights* : (B.3.2) ;
- particular rights pertaining to add-ons (B.3.3).

### **B.3.1 General *user rights***

As displayed under *User rights* ;, they rule the **management rights** to various basic Blue Chameleon functionalities.

### **B.3.2 *Menu script user rights***

They rule the **access** to Blue Chameleon's general tools and add-ons :

- News (7.1) ;
- Agenda (7.2) ;
- Alarms (7.3) ;
- File manager (7.4) ;
- Customer Relationship Manager (7.9), Projects / Timesheets (7.10) and Human Resource Manager (7.11) ;
- Helpdesk (8).

### **B.3.3 Rights pertaining to add-ons**

They are displayed under :

- *OGA user rights* (6.5.1.1) ;
- *CRM user rights* (7.9.1) ;
- *Project / Timesheets user rights* (7.10.1) ;
- *HR Management user rights* (7.11.2).