



## Roles and Permission in Projects

Archived

In Projects we have the following roles:

**PM** : Project Manager

**Senior Team**: Senior team can edit project team and has access to sensitive project information such as financial information (used in plug-ins)

**Team** : Standard team member of a project

**Senior Client**: Client won't be able to see private tasks, but senior client can access sensitive project information such as financial information

**Client**: Standard client permission that won't be able to see private tasks or private notes

### PROJECT ROLES

| PROJECT ROLES           | RESPONSIBILITY                      | RIGHTS   |
|-------------------------|-------------------------------------|--|
| <b>PM</b>               | (Senior PM)<br>(Junior PM)          | Getting notification<br>view/edit finance info |
| <b>SENIOR TEAM</b>      | (Lead Designer)<br>(Lead Technical) | View/Edit finance info                         |
| <b>TEAM</b>             | (Engineers)<br>(Designer)           |  |
| <b>SENIOR CLIENT</b>    | (Designer)                          | View finance info                              |
| <b>CLIENT</b>           |                                     |  |
| <b>Admin permission</b> |                                     | View finance info                              |

from admin panel they can set who can create new project & who can have full permission (regardless they are within the team or not)

Create New Project  
 Full Permission

### Role Capabilities

| Capability                                       | Full Permission user (in whole project) | PM | Senior Team | Team | Senior Client | Client |
|--|---|----|-------------|------|---------------|--------|
| view project information                         | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view team  | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view tasks                                       | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view private tasks                               | Y                                       | Y  | Y           | Y    |               |        |
| updating own task status                         | Y                                       | Y  | Y           | Y    | Y             | Y      |
| add task   | Y                                       | Y  | Y           | Y    |               |        |
| edit/delete their own tasks                      | Y                                       | Y  | Y           | Y    |               |        |
| changing ordering of tasks & section             | Y                                       | Y  |             |      |               |        |
| edit/delete all tasks                            | Y                                       | Y  |             |      |               |        |
| view discussion                                  | Y                                       | Y  | Y           | Y    | Y             | Y      |
| participate in discussion                        | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view private discussion                          | Y                                       | Y  | Y           | Y    |               |        |
| participate in private discussion                | Y                                       | Y  | Y           | Y    |               |        |
| edit delete their own discussion                 | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view and edit/delete all discussion              | Y                                       | Y  |             |      |               |        |
| view project file                                | Y                                       | Y  | Y           | Y    | Y             | Y      |
| upload project file                              | Y                                       | Y  | Y           | Y    | Y             | Y      |
| view private file                                | Y                                       | Y  | Y           | Y    |               |        |
| delete their own file                            | Y                                       | Y  | Y           | Y    | Y             | Y      |
| delete all project file                          | Y                                       | Y  |             |      |               |        |
| edit project properties including status summary | Y                                       | Y  |             |      |               |        |
| edit project team                                | Y                                       | Y  | Y           |      |               |        |
| delete project                                   | Y                                       | Y  |             |      |               |        |
| view financial extension                         |   | Y  | Y           |      | Y             |        |
| edit financial extension                         |   | Y  | Y           |      | ?             |        |

Example how extension permission can be implemented