

Project Options: Project Permissions

Project Roles

Head to *Admin > Infocapture > Your Project > Project Permissions > Project Roles*

Project roles are the collections of users who have the same level of rights across the project.

Think about how many different 'levels' of access your users will need to be separated into. An example would be:

Users: A role that has all staff in. They could submit new forms but not amend existing ones.

Managers: A role with managers in, who have permission to edit existing forms.

Admin: A role with full permission to make any changes they like.

An ideal number of roles would be no more than 3. As a general rule, if you are creating more than 5 roles, it's likely that you are overthinking things, and adding unnecessary complexity.

Rights

Now click on the *Rights* tab.

The level of rights can be defined for each project role, the submitter (aka reporter) and the handler.

Rights	Description	Things to bear in mind...
View tickets	Users are permitted to view tickets	This will allow the user, in the specified role, to see all submitted tickets. You may wish to just allow the Submitter of ticket view rights, rather than your all users role. This would mean that users could only see tickets that they themselves have created, but not those created by others.
Update tickets	Users are permitted to edit the form after submission	A user may be able to edit an ticket but if field permissions have been configured, they may not be able to update some, or any fields.
Report tickets	Users are permitted to submit new tickets	
Handle tickets	Users are permitted to be the handler of the ticket, i.e. the user the ticket is assigned to	Only users with handle tickets rights will appear in the list of possible handlers .
Update ticket status	Users are permitted to change the status of the ticket	A user may be able to change the status but if project workflow has been configured, there may be restrictions, including when they can change the status and what they are allowed to change the status to.
Assign tickets	Users are permitted to change the handler of the ticket (i.e. the user the ticket is assigned to).	
View notes	Users are permitted to view notes added to the ticket	
Add notes	Users are permitted to add notes to the ticket	
View files	Users are permitted to view files attached to the ticket	
Attach files	Users are permitted to attach files to the ticket	
View history	Users are permitted to view the history of the ticket	This includes the full history log, which captures all changes throughout the ticket life cycle, and the history diagram, which displays a graphical representation of status and SLA changes.
Manage	Users are permitted to delete tickets,	

tickets	delete files attached to tickets and delete notes added to tickets	
View reports page	Users are permitted to view the reports page	

Users will have access to:

- All tickets **OR**...
- ...Only tickets of which they are the reporter **AND/OR**...
- ...Only tickets of which they are the handler

Rights can be defined for all tickets or only tickets of which the user is the reporter or handler. For example, users may be able to see all tickets submitted, but only be able to update those which they reported.

If you require more complex permissions, this may be possible by using a plugin. For more information, please see [here](#).

An example rights table

Rights	Project role				
	<input type="checkbox"/> All Staff	<input type="checkbox"/> Managers	<input type="checkbox"/> Administrator	<input type="checkbox"/> Submitter of ticket	<input type="checkbox"/> Ticket handler
View tickets	<input type="checkbox"/> 1	<input checked="" type="checkbox"/> 2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/>
Update tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Submit tickets	<input checked="" type="checkbox"/> 4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Handle tickets	<input type="checkbox"/>	<input checked="" type="checkbox"/> 5	<input checked="" type="checkbox"/>		
Update tickets status	<input type="checkbox"/>	<input checked="" type="checkbox"/> 6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Assign tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View notes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Add notes to a ticket	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View attached files	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attach files to a ticket	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View history of tickets	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage tickets (delete, files, notes)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/> 7	<input checked="" type="checkbox"/>
View reports page	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Things to note:

1. All staff don't have View Tickets rights, so that they can't view all the submitted forms...
2. but Managers can see everything submitted...
3. ... It's important to allow the Submitter of ticket role view rights though. This means if a user creates a new ticket, they can see it, along with any others that they created themselves.
4. Creating new tickets is the only right that the majority of users, within the All Staff role, have.
5. Managers can handle tickets, meaning that tickets can be assigned to any individuals within this role.
6. Additionally, they can update the status of tickets. A user in the 'All Staff' role would be able to see the status of any ticket they've submitted, but not change it.
7. Manage tickets gives users the ability to delete submitted tickets, files, and notes. It's important to untick this box so that a user can't delete other peoples' notes and files within the tickets that they submitted.

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