



Projects: Admin overview

Introduction

In this article, you will be given an overview of the admin area of the Projects application.

As an admin, this is a great place to start to ensure that you and the team have appropriate permissions set up.

The admin side & projects permissions

The first section available is 'Permissions'.

A screenshot of the 'Project Permission' admin interface. The top navigation bar shows 'Admin / Projects / Permissions'. On the left, a sidebar menu has 'Permissions' highlighted with a red box, and 'Files' and 'Communication' listed below it. The main content area is titled 'Project Permission' and includes a subtitle 'Manage who can create projects and who has full access to all projects'. Below this, there is a search bar with the text 'Start typing to add...' and two buttons: 'Browse' and 'Remove'. A dropdown menu is open, showing 'All registered' as the selected option, with sub-text 'Role: Administrators' and 'User: Claromentis Administrator'. Below the dropdown, there are three checkboxes: 'Create New Project' (checked), 'Full Permission' (unchecked), and 'Add/Edit companies' (unchecked). A link 'View effective permissions...' is also present. At the bottom, there is a purple button labeled 'Apply permissions'.

You can assign certain user groups and roles to have permissions over the following options:

- **Create New Project:** This enables the user(s) to create new projects from the front end.
- **Full Permission:** This enables the user(s) to create, edit, delete, and view all projects.
- **Add/Edit companies:** This enables the user(s) to add and edit companies within your project.

Next, you will see the 'Files' section.

Admin / Projects / Files

Permissions

Files

Communication

Files

Manage the folder in Documents that contains all project files

Folder location

Projects

Choose folder

Submit

Here you will be able to integrate your Projects within the Documents application by selecting a folder from the directory to which all your project items can be stored.

Please note: You will first need to create a new folder under the Documents application ready-for-use.

The last section available is the 'Communication' option.

Admin / Projects / Files

Permissions

Files

Communication

Communication

Manage which messages are sent via system notifications and which are sent in a daily digest email

Add team member

☒ Notification ☐ Daily digest email

Team member role changed

☒ Notification ☐ Daily digest email

Project updated

☒ Notification ☐ Daily digest email

Project status changed

☒ Notification ☐ Daily digest email

Project file added

☒ Notification ☐ Daily digest email

Task assigned to user

☒ Notification ☐ Daily digest email

Task added

☒ Notification ☐ Daily digest email

Task updated

☒ Notification ☐ Daily digest email

Task completed

☒ Notification ☐ Daily digest email

Task file added

☒ Notification ☐ Daily digest email

Submit

Each of the items listed will trigger a notification within your Project. You can set up what type of notification will be sent out per trigger.

Please note: The 'Notification' option is set up as the default method under the notification settings.

Related Article

[Roles and Permission in Projects](#)

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