



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 breadcrumb trail at the top reads 'Admin / Projects / Permissions'. A red box highlights the 'Permissions' tab in the left sidebar. The main content area is titled 'Project Permission' and includes the subtitle 'Manage who can create projects and who has full access to all projects'. Below this, there is a search input field with the placeholder text 'Start typing to add...', a 'Browse' button, and a 'Remove' button. 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). At the bottom, there is a link 'View effective permissions...' and a purple 'Apply permissions' button.

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

Files

Communication

Files

Manage the folder in Documents that contains all project files

Folder location:

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	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Team member role changed	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Project updated	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Project status changed	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Project file added	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Task assigned to user	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Task added	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Task updated	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Task completed	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Task file added	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email

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

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