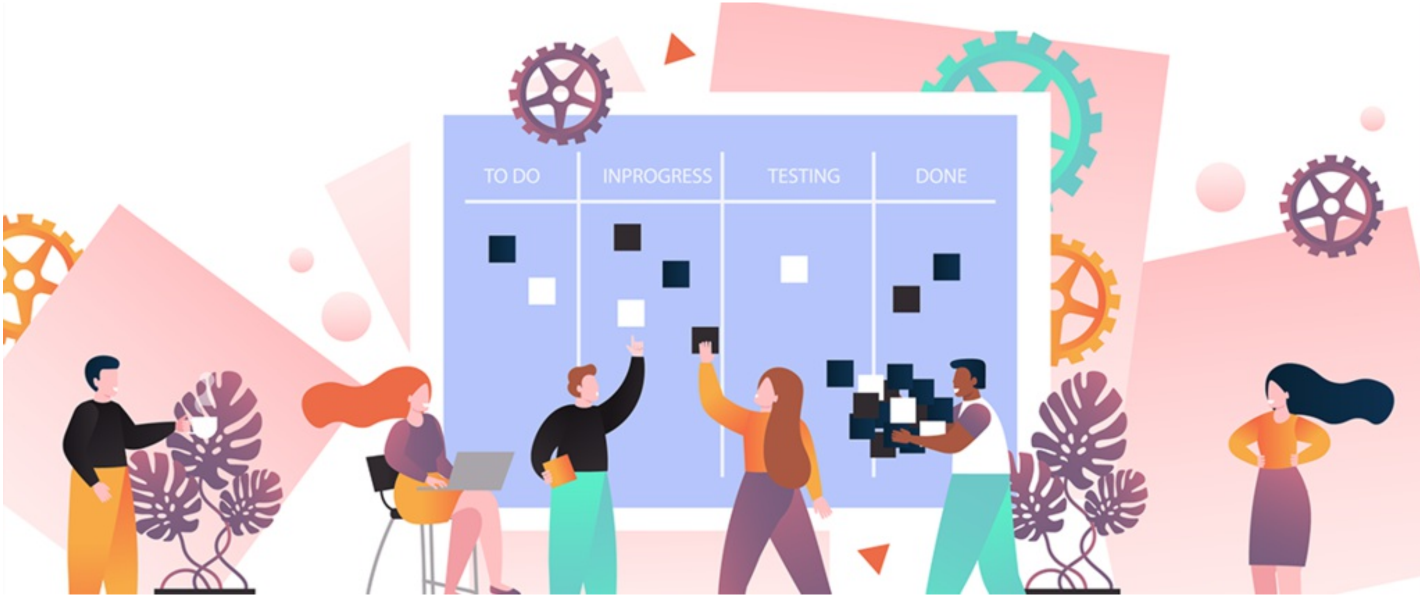
Link to article: https://discover.claromentis.com/knowledgebase/articles/773



Projects: Admin overview

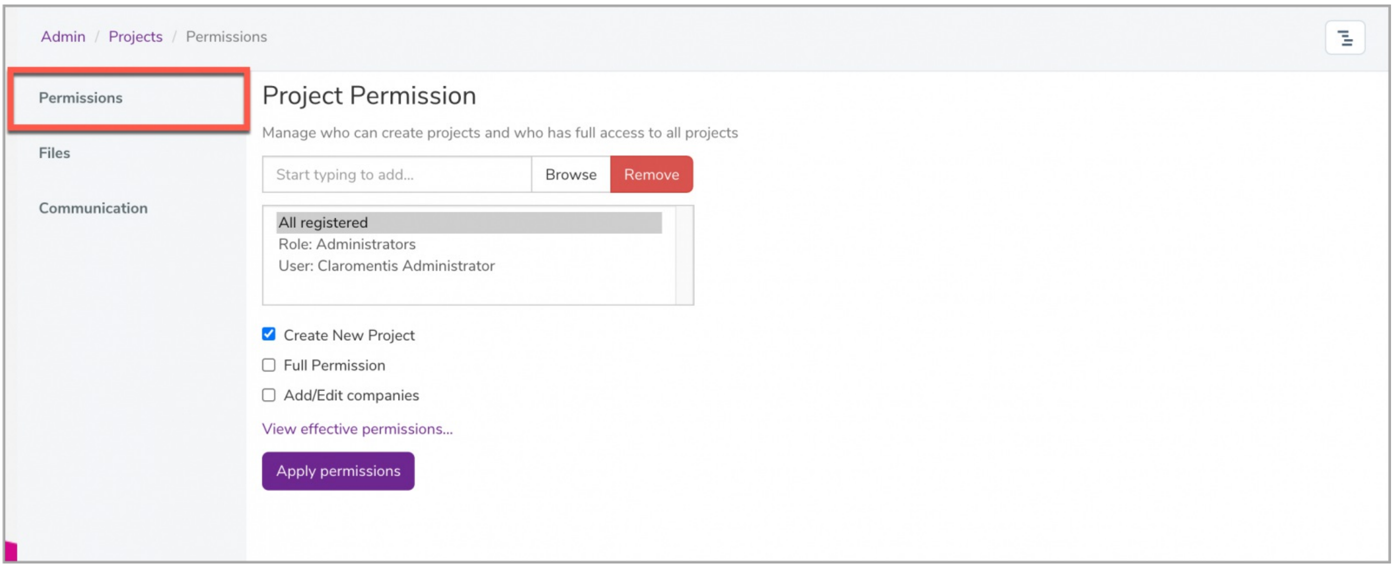
Introduction

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

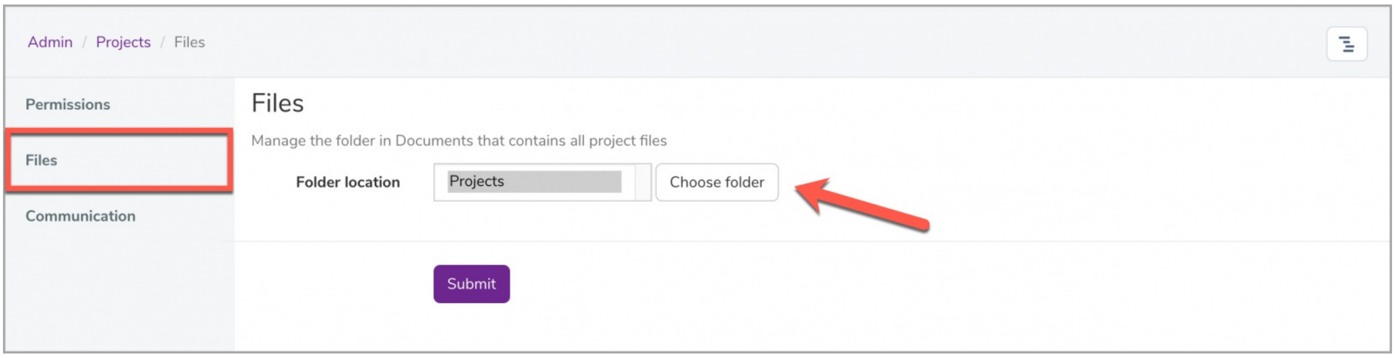
The first section available is '**Permissions**'.



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.

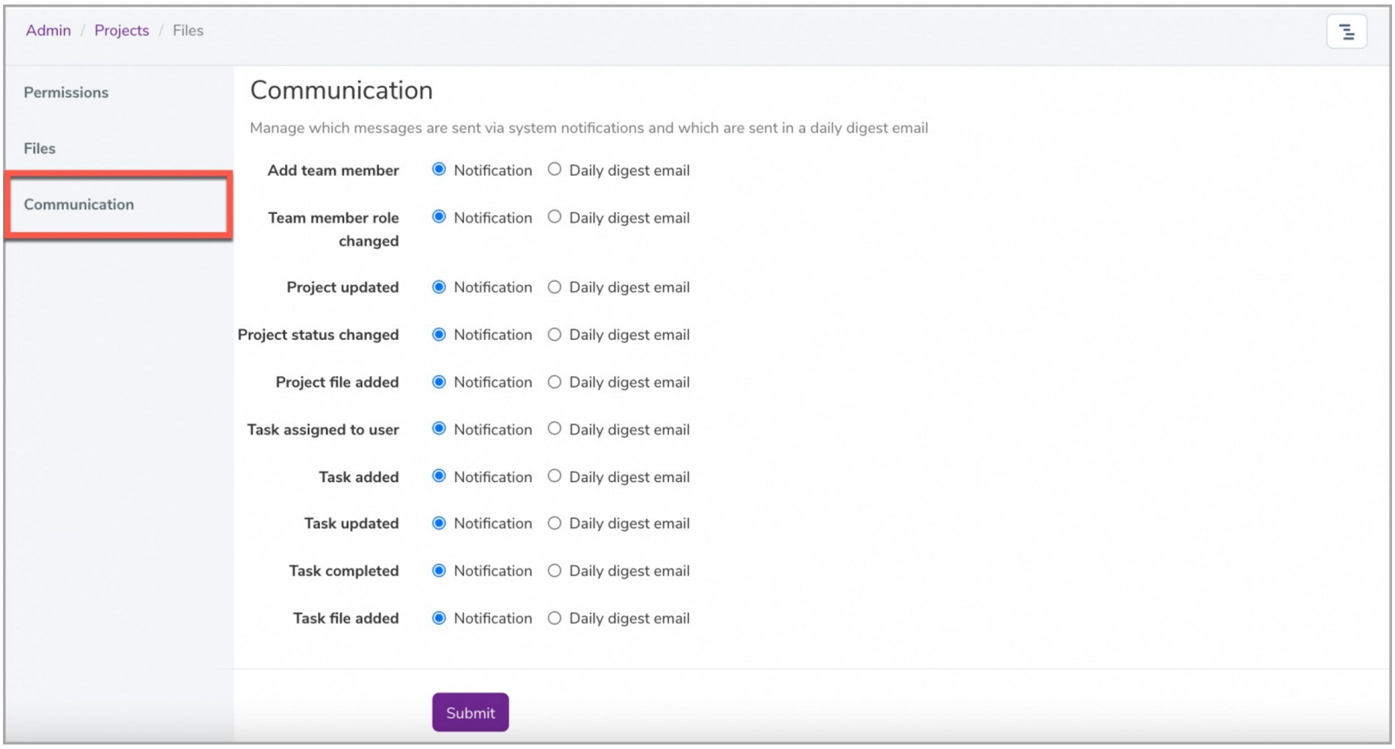
Next, you will see the '**Files**' section.



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.



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

Last modified on 6 December 2023 by Hannah Door

Created on 18 January 2021 by Veronica Kim

Tags: projects, user guide, administrator