

Projects: Admin overview

[Application administrators](#) of the Projects application can configure the admin side, ready for Projects to be created by users with permissions on the front end.

This guide will detail all the options available. It's recommended to set these up before Projects start to be created on the front end.

Admin side tabs

Head to Applications > Admin > Projects

- The 'Permissions' tab

A screenshot of the 'Project Permission' admin interface. The interface shows a sidebar with 'Permissions' selected, a search bar, and a list of permissions including 'Create New Project', 'Full Permission', and 'Add/Edit companies'. A button 'Apply permissions' is visible at the bottom.

Assign users/roles/groups permissions to perform desired actions:

- **Create New Project:** User(s) can add new projects
- **Full Permission:** User(s) can create, edit, delete, and view all projects (even if they have not been included in each project's permissions specifically)
- **Add/Edit companies:** User(s) to add and edit companies within your project.

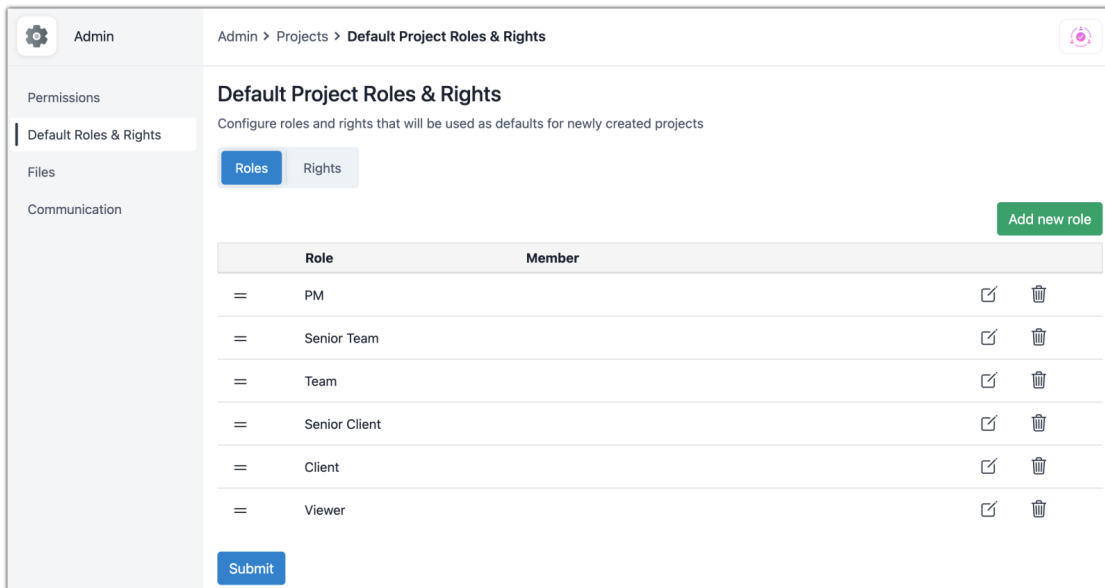
Generally, administrators or responsible users who should have an overview of all projects will be given all permissions.

Users you wish to only be able to create and see their own projects (or projects they have been added to by others) give the 'Create new project' permission only.

As long as they add themselves to the project in a role with permissions to view, they will be able to make further edits.

- The 'Default project Roles & Rights' tab

Here, an administrator can set the [Roles & Rights](#) that will autopopulate for any Project created on the [front end](#):



The screenshot shows the 'Default Project Roles & Rights' configuration page. The left sidebar has 'Permissions' selected, with 'Default Roles & Rights' highlighted. The main content area has 'Roles' selected. A table lists roles and their members:

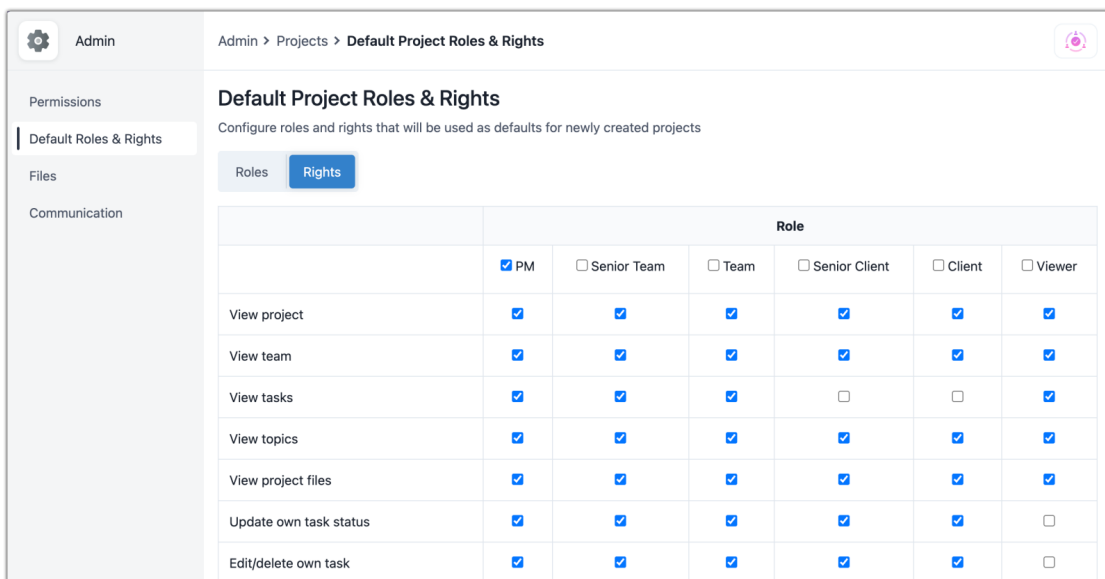
Role	Member		
= PM		<input checked="" type="checkbox"/>	<input type="checkbox"/>
= Senior Team		<input checked="" type="checkbox"/>	<input type="checkbox"/>
= Team		<input checked="" type="checkbox"/>	<input type="checkbox"/>
= Senior Client		<input checked="" type="checkbox"/>	<input type="checkbox"/>
= Client		<input checked="" type="checkbox"/>	<input type="checkbox"/>
= Viewer		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons for 'Add new role' and 'Submit' are visible.

This prevents this manual work from being repeated in each Project if the general permissions needing to be set are the same.

Consider the Roles your Company needs across Projects and tweak these or rename them.

Consider what [permissions](#) each Role should have universally and set these.



The screenshot shows the 'Default Project Roles & Rights' configuration page with the 'Rights' tab selected. A table shows permissions for various roles:

	Role					
	<input checked="" type="checkbox"/> PM	<input type="checkbox"/> Senior Team	<input type="checkbox"/> Team	<input type="checkbox"/> Senior Client	<input type="checkbox"/> Client	<input type="checkbox"/> Viewer
View project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
View project files	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Update own task status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit/delete own task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click 'submit' to apply any changes.

When Projects are created on the front end, the default Roles & Rights will pre-populate to speed up this process, but they can still be edited further by the Project creator if needed.

- The Files tab

Select the folder in the Documents application where Project files should be stored.

By default, the system creates a 'Projects' folder for use, but you can create your own and change the location on the admin side if preferred.

Admin
Admin > Projects > Files

Permissions

Default Roles & Rights

Files

Communication

Files

Manage the folder in Documents that contains all project files, please note that changing the folder location will only apply to new projects and won't affect existing ones

Folder location Choose folder

Submit

Settings

Action for non-images

Download

Preview

Always detailed upload

Open docs in new window

View style

Icons

List

Submit

- **Action for non-images:** Choose what happens when users click on content in the project, whether it opens a preview or downloads immediately
- **Always detailed upload:** Check this box to ensure all file uploads will be given the extended list of fields to accompany them
- **Open docs in new window:** Check this box to ensure all clicks on files open in a new window (meaning users do not have to go back to view the project when browsing files)
- **View Style:** How files will appear across Projects, with file icons or as a list

- The 'Communication' tab

For the list of actions, choose which format of notification should be sent to users (who are included in Projects on the front end)

The choice is between what users have set in their [notification preferences](#), or to override this and send the content as a daily digest-style email:

Admin
Admin > Projects > Communication

Permissions

Default Roles & Rights

Files

Communication

Communication

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

Added to team	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Team members added	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Member role changed	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
Team member responsibility 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
Project deleted	<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 completion	<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
Task deleted	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email
New topic added	<input checked="" type="radio"/> Notification	<input type="radio"/> Daily digest email

Submit

Related Article

[Roles and Permission in Projects](#)

Created on 13 March 2026 by [Hannah Door](#)

Tags: [projects](#), [user guide](#), [administrator](#)