Link to article: https://discover.claromentis.com/knowledgebase/articles/804



Projects version 2.0+ has slight changes to how rights and roles work from previous versions, ensuring more granular control over the permissions certain roles have.

The permissions table allows differing access across roles to be configured to best fit your requirements for that project.

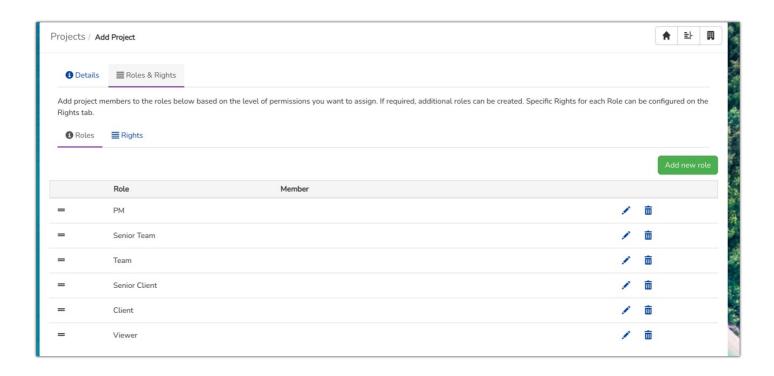
Each new project created can have different roles and permissions to meet any project purpose.

Roles Tab

In Projects the following 6 roles are hardcoded so will appear in all new Projects created.

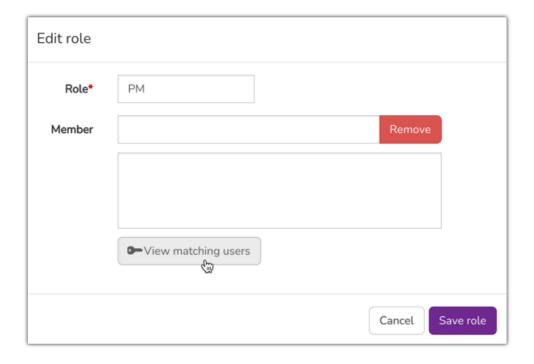
- PM
- Senior Team
- Team
- Senior Client
- Client
- Viewer

To add a new role to the project, use the **Add new role** button.



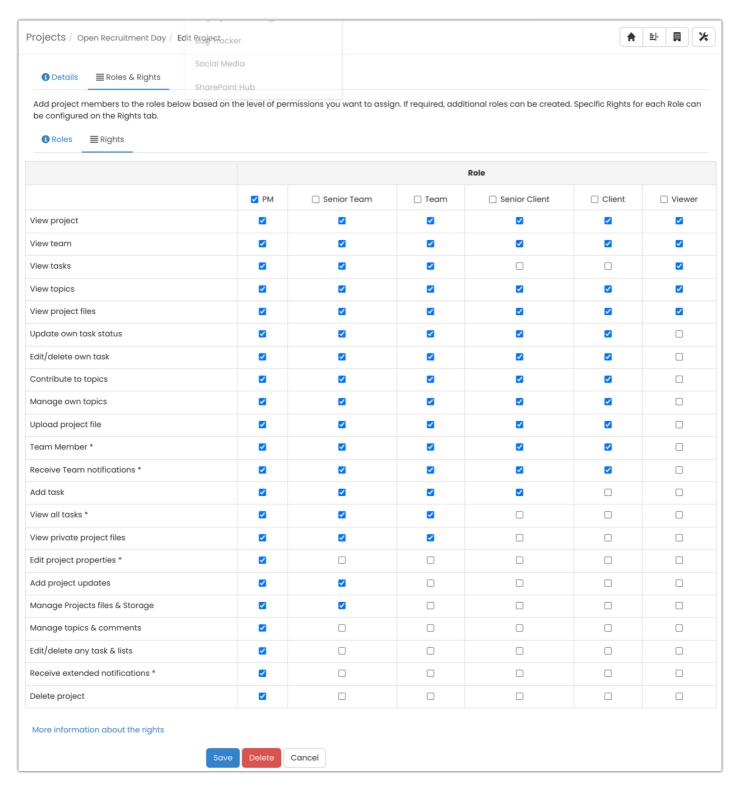
Each role can be edited using the pencil (Edit) icon to allow their title to be changed to something more appropriate for your business if preferable.

You can add a User, Roles, and/or Group using the 'Member' field.



Rights Tab

You can view the permissions table. This area allows you to define what each role can do in the Project based on your requirements.

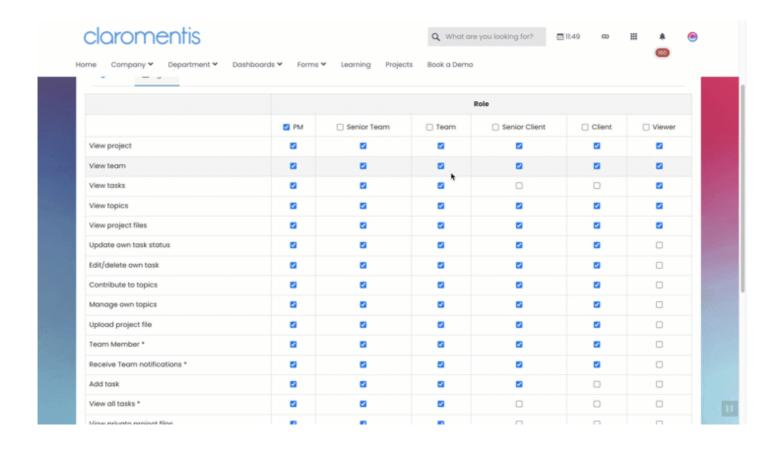


Team members and clients can have varying levels of permissions with Project Manager (PM) being the highest and the Viewer with the least.

Tip: Familiarise yourself with the list of permissions given on the left-hand side and consider which would be most appropriate for which roles.

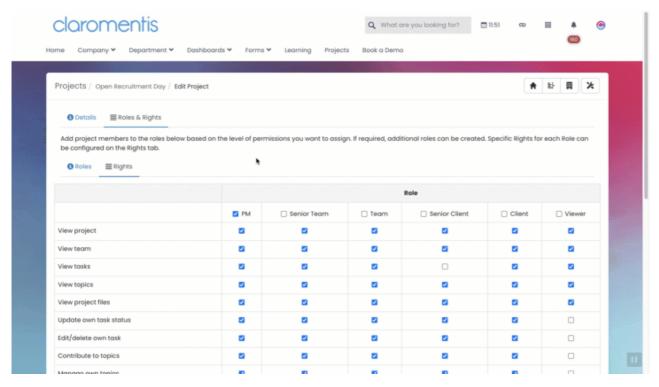
To edit the permissions of a role, uncheck the box in line with the row and click **Save** to update.

These permissions will apply to each role going forward.



At the bottom of the table is a collapsable reference guide.

This can be expanded to reveal more information on what a user will be able to carry out or access if they have certain permissions.



e.g.lf a user has the 'Edit project properties' permission - this will allow them to change the RAG status, access the 'Edit Project' area, Add, Edit & Delete tasks columns, as well as, Add and Remove team members.

This is helpful information to consider when giving certain permissions to roles.

Tip: If you are ever concerned about what a project role can do/access once you have set up the permissions table or would like to see the role's user experience in real-time, consider adding a test user profile to the same role and logging in as them.

You can test the actions they can perform in the Project to ensure you are confident before adding more users to the role or checking that their experience matches your requirements.

Created on 12 May 2021 by Hannah Door. Last modified on 6 December 2023

Tags: projects, role, rights