

Projects: Roles & Rights

In Projects, Roles are how users are categorised by the level of interaction needed , e.g. Project Lead, Project Manager vs the client, supplier, etc

Rights are how permissions are given to each Role and determine what abilities they have within a Project.

Generally, we want the most senior project management roles to be able to do everything, whereas client roles or those with less involvement are more restricted in what they can do.

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

Admin set up

Application administrators for Projects can [set default Roles and Rights](#) on the admin side of the application.

This means any project created will pre-populate with the options and be configured there.

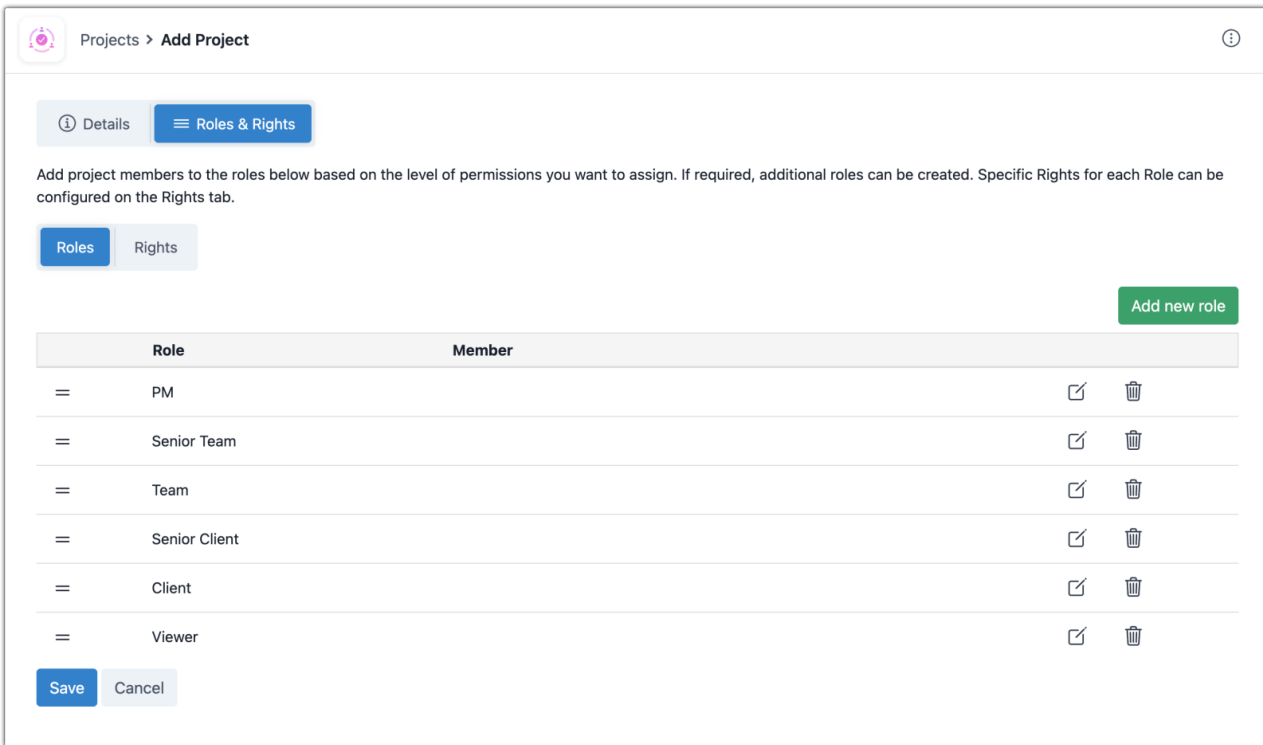
If you have Roles and Rights that will be repeated across multiple projects, or that fit all projects in general, it is strongly recommended to set up the default tab to reflect this structure first.

Then, when new projects are created, those creating them can make tweaks beyond the core setup that has already been pulled through.

Roles Tab

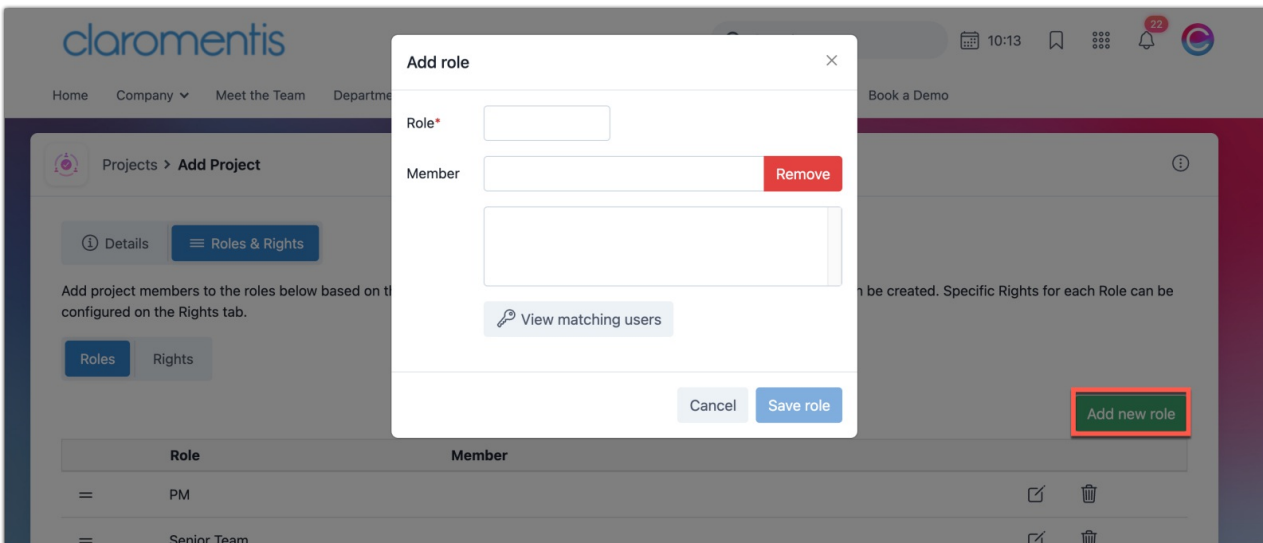
In Projects, 6 Roles are hardcoded, but these can be renamed or removed from the admin side by administrators to better fit your company's requirements.

The Roles configured on the admin side will pull through to any new project created on the front end, and can be further tweaked by the Project creator for their project specifically.

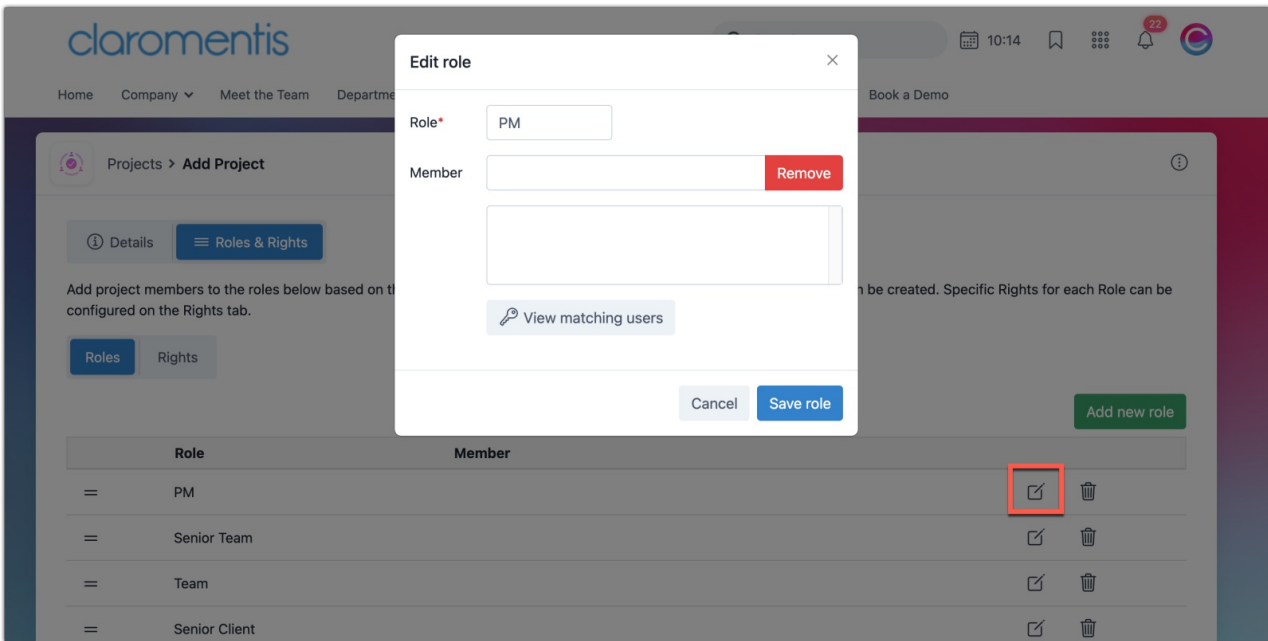


They can rename, add or remove Roles to best match their needs, as well as set which users are included across them.

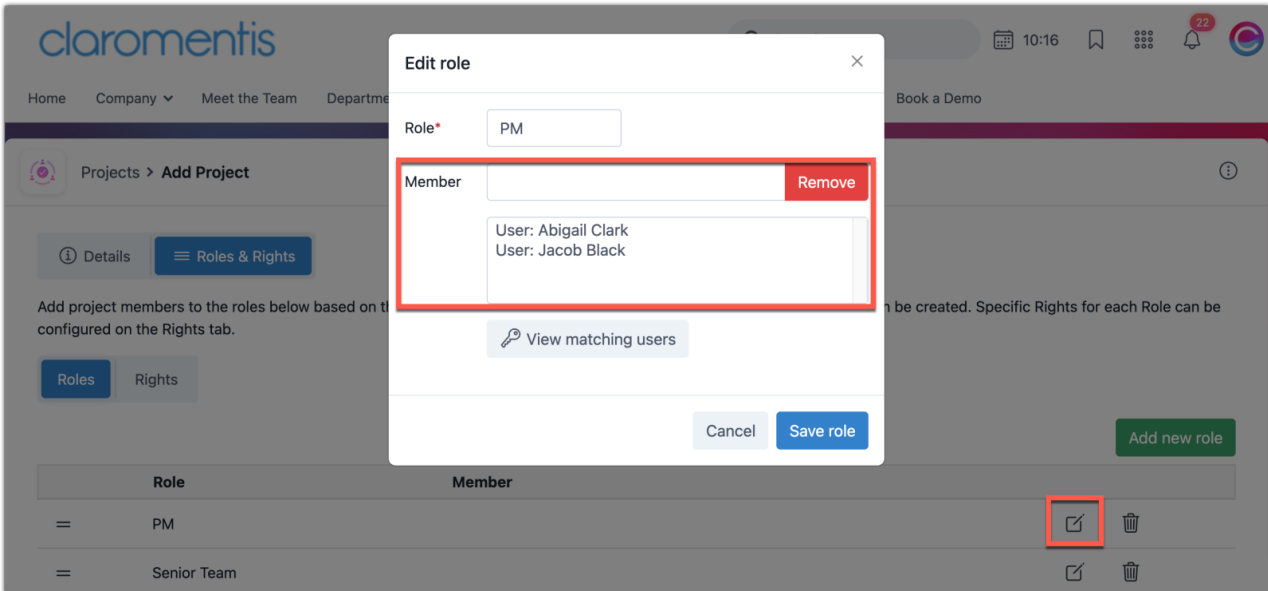
- Add a new role using the button for this, save it with 'Save Role'



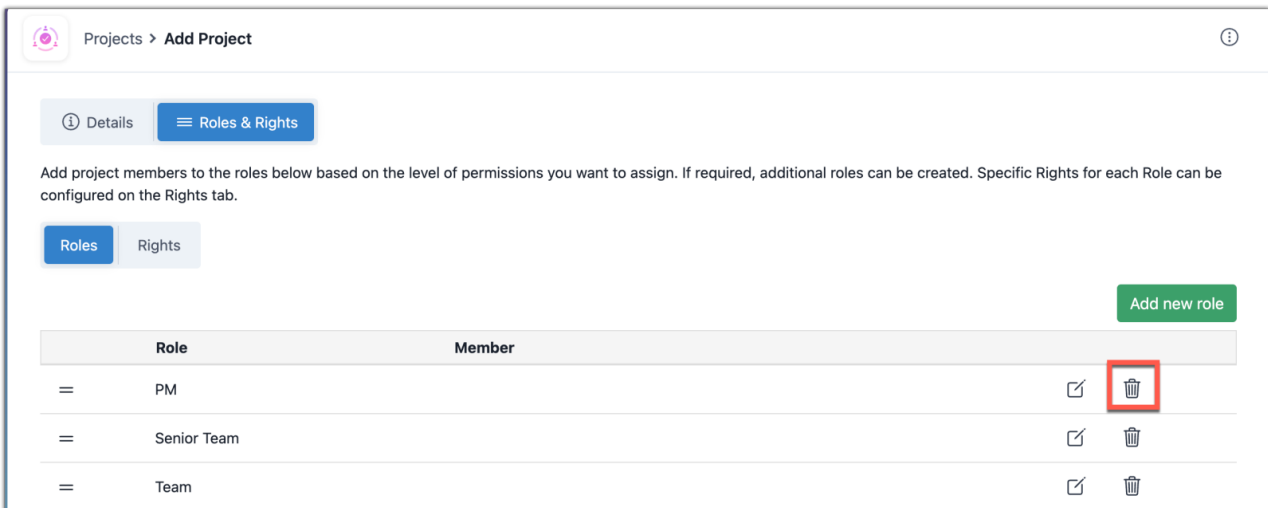
- Rename a role by clicking the pencil icon, click 'save Role' to apply



- Put users in each Role by editing it with the pencil icon, click 'save role' to apply



- Remove a Role from the Project by clicking the bin icon, a pop-up will appear asking for confirmation to proceed



Please note: To ensure all changes you make save, click to save in each pop-up and then the Rights tab overall using its own save button:

Projects > Add Project

Details Roles & Rights

Add project members to the roles below based on the level of permissions you want to assign. If required, additional roles can be created. Specific Rights for each Role can be configured on the Rights tab.

Roles Rights

Add new role

| Role | Member | | |
|-----------------|--------|---|----|
| = PM | | ✓ | 🗑️ |
| = Senior Team | | ✓ | 🗑️ |
| = Team | | ✓ | 🗑️ |
| = Senior Client | | ✓ | 🗑️ |
| = Client | | ✓ | 🗑️ |
| = Viewer | | ✓ | 🗑️ |

Save Cancel

Once a user has been included in a Role, they will get all the Rights assigned to it, which are set in the next tab.

Rights Tab

The permissions each Role has can be edited from here.

Choices will pre-populate based on what administrators have set up as the default on the admin side.

The Project creator can tweak these to suit their needs for the Project being made:



Details

Roles & Rights

Add project members to the roles below based on the level of permissions you want to assign. If required, additional roles can be created. Specific Rights for each Role can be configured on the Rights tab.

Roles

Rights

| | 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"/> |
| Contribute to topics | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Manage own topics | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Upload project file | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Team Member * | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Receive Team notifications * | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Add task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| View all tasks * | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| View private project files | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit project properties * | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Add project updates | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Projects files & Storage | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage topics & comments | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit/delete any task & lists | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Receive extended notifications * | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete project | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

More information about the rights

Save

Cancel

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

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Please download the file: [video/mp4](#)

The permissions with an asterisk next to them are further explained under the "More information button as what users who have them can do is not as obvious as the actions without an asterisk:

Delete project

[More information about the rights](#)

| | | | |
|--|---|---|---|
| <p>Edit project properties</p> <ul style="list-style-type: none"> Change RAG status Edit project Add, edit & delete tasks columns Add and remove team members | <p>Receive team notifications</p> <ul style="list-style-type: none"> Project is changed Project status is changed Comment posted A member's role is changed Topic added | <p>Receive extended notifications</p> <ul style="list-style-type: none"> Tasks updated Tasks marked as complete Tasks unmarked as complete Tasks discussion posted Tasks reply posted Tasks file added A member is added to a project | <p>Team Member</p> <ul style="list-style-type: none"> Visible in the team view Can be assigned tasks |
| <p>View tasks</p> <ul style="list-style-type: none"> View all non-private tasks Participate in tasks discussions | <p>View all tasks</p> <ul style="list-style-type: none"> View private tasks that are not assigned to the user | <p>Add/delete any tasks</p> <ul style="list-style-type: none"> Add and delete any tasks Add and delete task lists | <p>Manage project files & storage</p> <ul style="list-style-type: none"> View, edit, delete files Edit metadata Edit project folder permissions |
| <p>Manage topics & comments</p> <ul style="list-style-type: none"> Create, edit and delete any topics Create, edit and delete all comments on any topics or tasks Pin and unpin topics | | | |

Save
Delete
Cancel

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.

Changes over time

Once both Roles and Rights have been set in a Project, the users involved can begin interacting with the Project.

If further tweaks are needed over time, users with rights 'Edit project properties' rights or, application administrators of Projects can make the changes at anytime by editing the project, updating the Roles & Rights and saving.

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

Tags: [projects](#), [role](#), [rights](#)