



Roles & Rights in Projects

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.

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		

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.

Edit role

Role*

Member Remove

View matching users

Cancel Save role

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.

Projects / Open Recruitment Day / Edit Project **Big Packer**

Social Media
SharePoint Hub

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 **Delete** Cancel

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.

The screenshot shows the claromentis dashboard with a search bar and navigation menu. The main content is a table with columns for roles and rows for various permissions. The roles are PM, Senior Team, Team, Senior Client, Client, and Viewer. The permissions listed are: View project, View team, View tasks, View topics, View project files, Update own task status, Edit/delete own task, Contribute to topics, Manage own topics, Upload project file, Team Member *, Receive Team notifications *, Add task, and View all tasks *. Each cell contains a checked or unchecked checkbox.

	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 all tasks *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the table is a collapsible 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.

The screenshot shows the 'Edit Project' page in claromentis. The 'Roles & Rights' tab is active, displaying the same permissions table as in the first screenshot. The page includes a breadcrumb trail 'Projects / Open Recruitment Day / Edit Project' and a navigation menu with 'Details' and 'Roles & Rights' tabs. A note explains that project members are added based on the level of permissions assigned, and specific rights for each role can be configured in the 'Rights' tab.

e.g.If 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