



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.

The screenshot shows a web application interface for 'Projects / Add Project'. At the top right are icons for home, list, and calendar. Below is a tabbed interface with 'Details' and 'Roles & Rights'. The 'Roles & Rights' tab is active, showing a sub-tabbed interface with 'Roles' and 'Rights'. The 'Roles' sub-tab is active, displaying a table with two columns: 'Role' and 'Member'. The table lists six roles: PM, Senior Team, Team, Senior Client, Client, and Viewer. Each role row has a pencil icon for editing and a trash icon for deletion. A green button labeled 'Add new role' is located in the top right corner of the table area. Above the table, there is a text instruction: '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.'

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*

PM

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

Home
List
Grid
Close

Details
Roles & Rights

Social Media
SharePoint Hub

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](#)

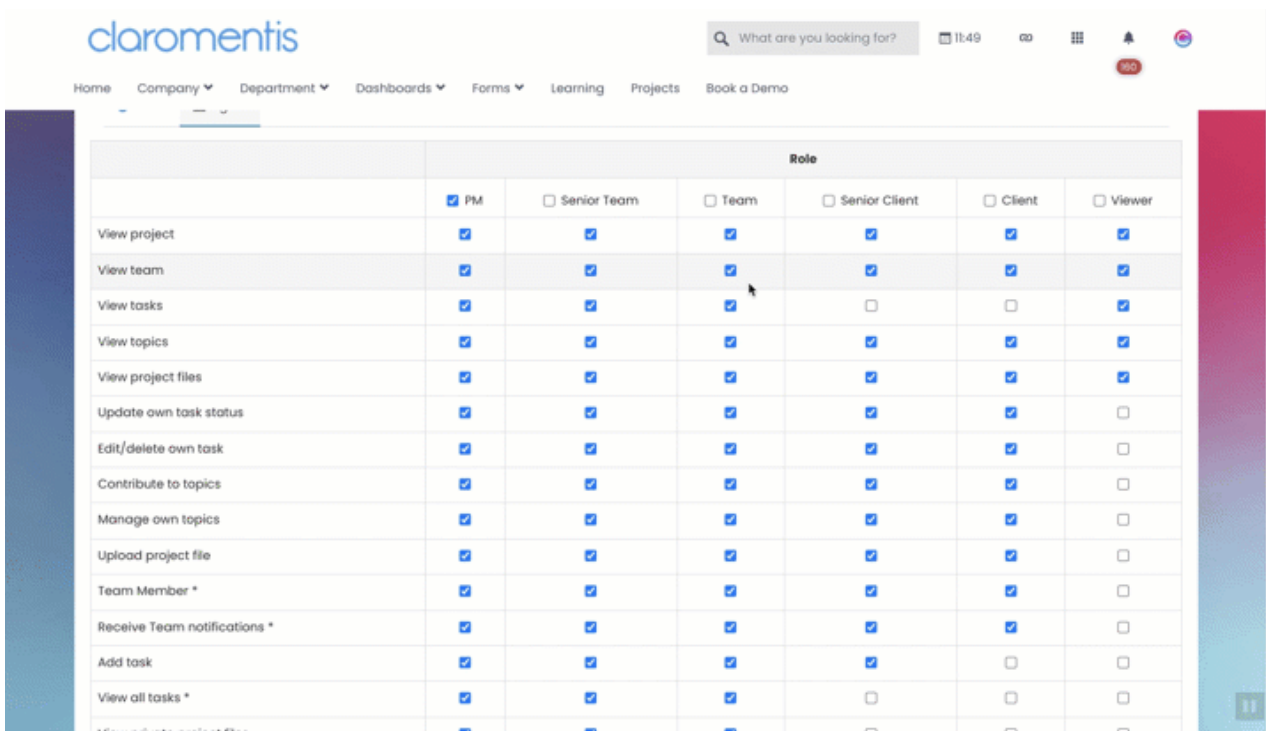
Save
Delete
Cancel

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.

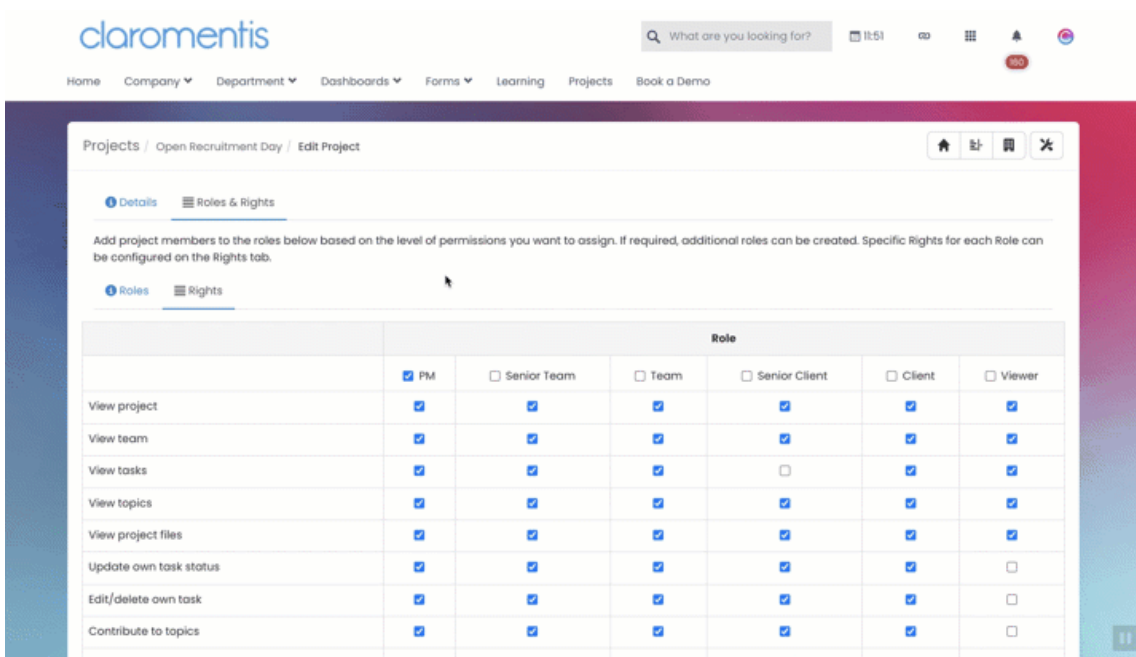


The screenshot shows the Claromentis dashboard with a search bar at the top and a navigation menu. Below the menu is a table titled 'Role' that lists permissions for different roles. The roles are PM, Senior Team, Team, Senior Client, Client, and Viewer. The permissions are listed on the left, and checkboxes indicate whether each role has that permission.

	<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 project files	<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 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.



The screenshot shows the 'Roles & Rights' configuration page in Claromentis. It includes a breadcrumb trail: 'Projects / Open Recruitment Day / Edit Project'. Below the breadcrumb, there are tabs for 'Details' and 'Roles & Rights'. The 'Roles & Rights' tab is active, showing a table with the same permissions as the first screenshot. The table is titled 'Role' and lists permissions for PM, Senior Team, Team, Senior Client, Client, and Viewer. The permissions are listed on the left, and checkboxes indicate whether each role has that permission.

	<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 checked="" 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"/>

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.

