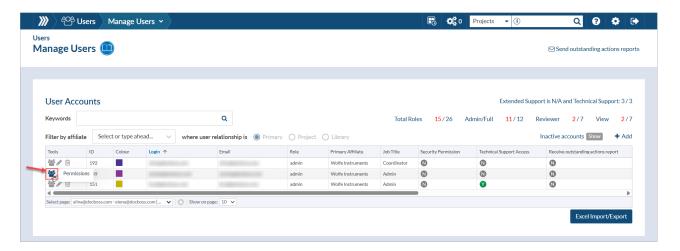
User Permissions

11/10/2025 2:03 pm MST

Permissions are managed from the **Manage Users** screen. Note that there is a **View Permissions** screen from the instance menu, but it is READ ONLY and is available to all user types.

To edit user permissions, navigate to **System Menu > Users > Manage Users.** From the grid, select the "Permissions" icon of the appropriate user





Note: You must have admin permissions in order to edit the permissions of other users.

User specific permissions

Global permissions

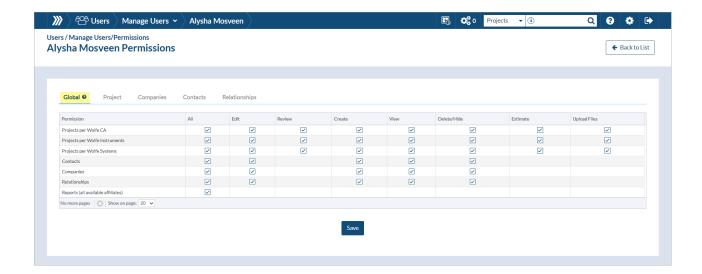
These options control access to every occurrence of an object.



Example: If a user has **full** permissions to **projects** on the **Global** tab, then they will have full access to every project in the system.

IMPORTANT: Global permissions <u>override</u> the any specific permissions. If global permission are assigned, individual permissions are **not required**.

Note that a users role will control the options available on the permissions screens. For example - a reviewer role cannot edit projects, so the **edit** option will not be available.

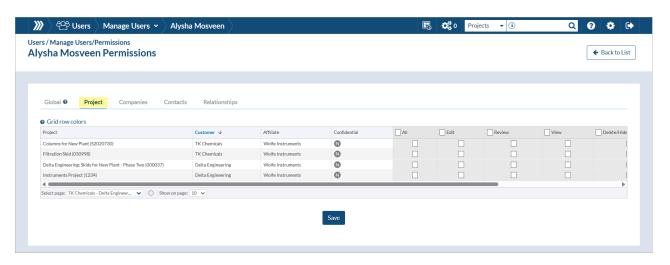


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Global project permissions are defined PER AFFILIATE. For more information, see this article: Enable Affiliate Permissions for a User.

Individual permissions

Each of the other tabs contains a list. In each of the specific grids (i.e., Project, Companies, Contacts or Relationships), you can set permissions for each item in the list.



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If the permission for the group (e.g., Projects) are being set at the global level, the individual permission options will be greyed out.