

User Permissions

09/19/2024 2:03 pm MDT

Permissions may only be 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.

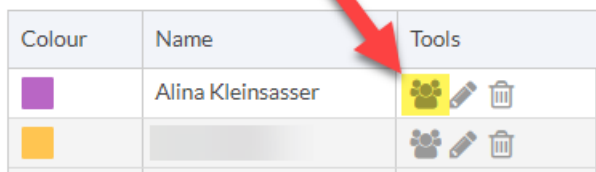
To edit user permissions, you must have an admin role.









To get here:

1. Open the Instance Menu
2. Under **Users**, select **Manage Users**
3. Click on the user permissions icon in the tools column (see image below)

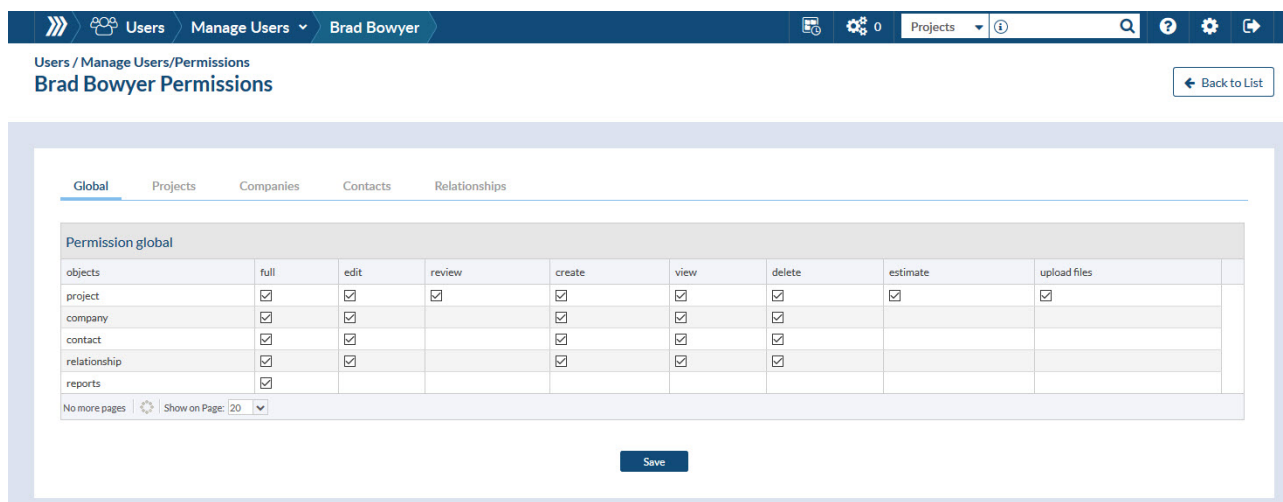
User accounts

Accounts List



Colour	Name	Tools
	Alina Kleinsasser	  
		  

User specific permissions



Users / Manage Users/Permissions
Brad Bowyer Permissions [← Back to List](#)

Global Projects Companies Contacts Relationships

Permission global	full	edit	review	create	view	delete	estimate	upload files
objects								
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"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
company	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
contact	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
relationship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
reports	<input checked="" type="checkbox"/>							

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Global permissions

These options control access to every occurrence of an object. i.e. If you have a **full** permissions to **projects** on the **Global** tab, then you will have full access to every project in the system.

Global permissions OVERRIDE the 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.

NOTE that global project permissions are defined PER AFFILIATE. For more information, see [Enable Affiliate Permissions for a User](#).

Individual permissions

Each of the other tabs contains a list. For each: Project, Companies, Contacts or Relationships, you can set permissions for each item in the list.
