

User Permissions

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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)

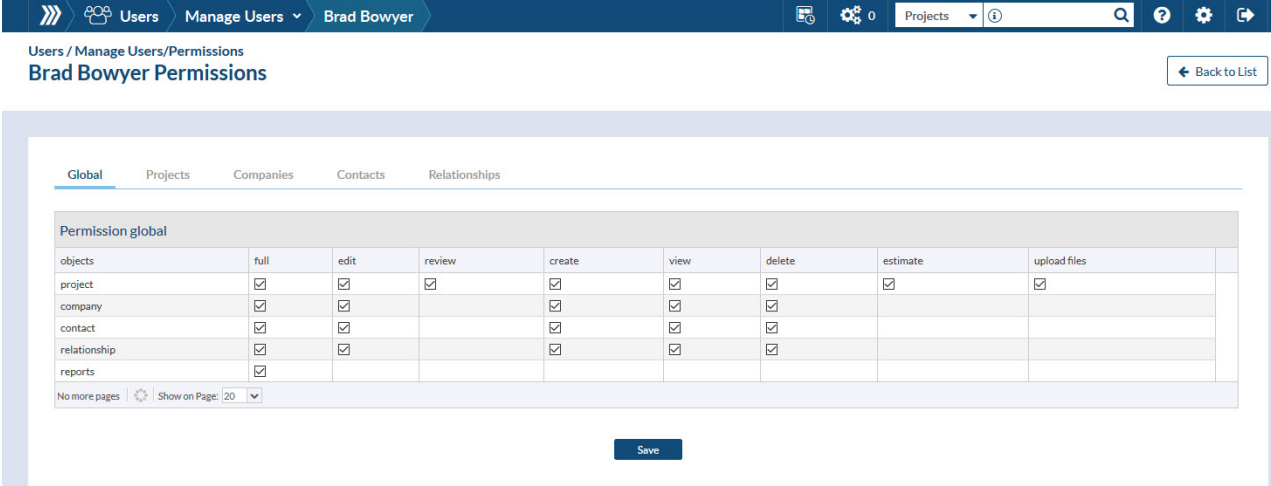
User accounts

Accounts List



Colour	Name	Tools
	Alina Kleinsasser	  
		  

User specific permissions



The screenshot shows the 'Brad Bowyer Permissions' screen. The breadcrumb trail is 'Users / Manage Users / Permissions'. The page title is 'Brad Bowyer Permissions' with a 'Back to List' button. The interface has tabs for 'Global', 'Projects', 'Companies', 'Contacts', and 'Relationships'. The 'Global' tab is active, showing a table of permissions for various objects. The table has columns for 'full', 'edit', 'review', 'create', 'view', 'delete', 'estimate', and 'upload files'. A 'Save' button is at the bottom.

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

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.

Security permission

The security permission is considered the highest level of permission, generally allocated only to one or two users. If a user has the Security permission enabled under their profile, they can enable the Security permission for other users from the **System Access** section of the user's profile.


Change password

New password

Must contain 10 letters, including a capital, a number, and a symbol.

Confirm new password

Force user to change password

Enable Security Settings 

Affiliate Settings

Default Affiliate *

Affiliate Address