## **User Permissions**

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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

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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.

Global @ Project Comp	anies Contacts	Relationships						
Permission	All	Edit	Review	Create	View	Delete/Hide	Estimate	Upload Files
Projects per Wolfe CA		Image: A start of the start						
Projects per Wolfe Instruments		$\checkmark$	$\checkmark$	$\checkmark$	$\checkmark$	Image: A start of the start	$\checkmark$	
Projects per Wolfe Systems	~	~		~	<b>Z</b>		Image: A start of the start	
Contacts				Image: A start of the start				
Companies		~		~				
Relationships	2							
Reports (all available affiliates)								

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.

Global 🛛 Project Companies C	ontacts Relationships						
Grid row colors				_	_	_	_
Project	Customer $\psi$	Affiliate	Confidential	Edit	Review	View	Delete/Hid
Columns for New Plant (S2020730)	TK Chemicals	Wolfe Instruments	0				
Filtration Skid (030998)	TK Chemicals	Wolfe Instruments	0				
	Delta Engineering	Wolfe Instruments	N				
Delta Engineering: Skids for New Plant - Phase Two (000037)	Deita Engineering	wone instruments	<b>U</b>				

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