

Confidential Projects

04/17/2026 4:10 pm MDT

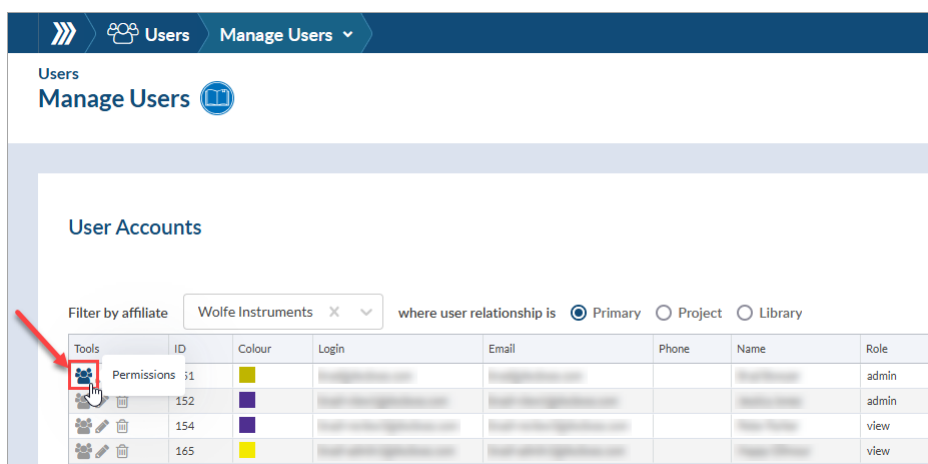
When setting up a project, you have the option to make the project confidential. Enabling this option **blocks access** to the project unless a user is specifically granted access to it, which can be useful in cases where the project contains sensitive information.

Admin users have the ability to grant non-admin users access to confidential projects. Admin users can also grant themselves access so long as they have the appropriate affiliate access.

Granting access

To add a user to a project, navigate to **System Menu > Users > Manage Users**.

For the user you are looking to add to the project, click on the first icon under "Tools" to access the users permission settings.



The screenshot shows the 'Manage Users' interface. At the top, there is a navigation bar with 'Users' and 'Manage Users' tabs. Below this, the 'User Accounts' section is visible. A filter is set to 'Wolfe Instruments' and 'where user relationship is' is set to 'Primary'. A table of user accounts is displayed with columns: Tools, ID, Colour, Login, Email, Phone, Name, and Role. A red arrow points to the 'Tools' icon in the first row of the table.

| Tools | ID | Colour | Login | Email | Phone | Name | Role |
|-------------|-----|--------|------------|------------|-------|------------|-------|
| Permissions | 11 | Yellow | [Redacted] | [Redacted] | | [Redacted] | admin |
| [Icon] | 152 | Purple | [Redacted] | [Redacted] | | [Redacted] | admin |
| [Icon] | 154 | Purple | [Redacted] | [Redacted] | | [Redacted] | view |
| [Icon] | 165 | Yellow | [Redacted] | [Redacted] | | [Redacted] | view |

From the user's permission settings:

1. Open the "Project" settings (second tab above the grid).
2. Find the confidential project in the grid* and enable access.
(*Note: Available actions are limited by the user's role*)
3. Click "Save" to update the user's permissions.

Users / Manage Users / Permissions

Global **Project** Companies Contacts Relationships

Grid row colors

| Project | Affiliate | Confidential | <input type="checkbox"/> Full | <input type="checkbox"/> Edit | <input type="checkbox"/> Review | <input type="checkbox"/> View | <input type="checkbox"/> Delete | <input type="checkbox"/> Estimate | <input type="checkbox"/> Upload |
|---------------------------|-------------------|--------------------------|-------------------------------|-------------------------------|-------------------------------------|-------------------------------|---------------------------------|-----------------------------------|---------------------------------|
| ALY Test Company (4531AM) | Wolfe Instruments | Y | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Select page: Altra Test 4 (2342) - Delta Engineering 000... Show on page: 10

3 Save

*Confidential projects will be highlighted in the grid, as well as display a green "Y" under the "Confidential" column. The project name can be identified by the sales order number identified in the "Project" column.