PM ProjectManager

Customizing Account
& Project Security

Customizing Account & Project Security

ProjectManager allows you to set permissions on the account level and on a per-project basis. Users can define account roles with global admin, admin, manager, member, custom or guest role but also can provide manage, edit or collaborate access per project. For example, an admin can have "manage" access on one project but "edit" access on another project.

Account security

You have the ability to fully customize who can access certain areas of the software on an account level. You can assign a team member to one of the below roles:

✓ **Global Admin**   ✓ **Manager**   ✓ **Guest**

✓ **Admin**   ✓ **Member**   ✓ **Custom***

Each role has a default setting, but these can be customized with two minor exceptions for Admins (Global Admins default to all access):

✓ **Edit account security**

✓ **Edit account/billing pages**

Global Admin is the default role if you're the original user on the account. Security and account page permissions cannot be removed from the Global Admin or Admin role, or from users in that role.

The Account Owner is the person who registered the account and receives financial statements. You can see and edit this person on account > settings > account owner field. The account owner will always receive billing receipts and have access to the billing page, even if they have a different security role.
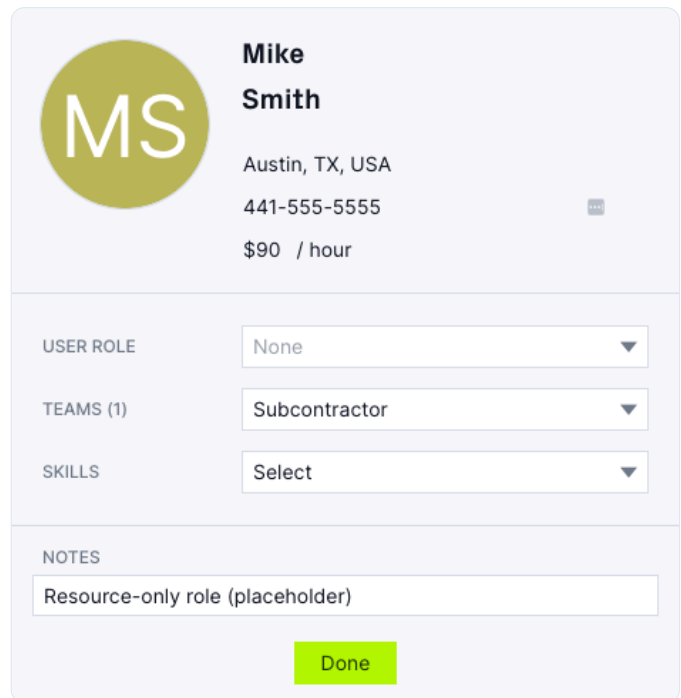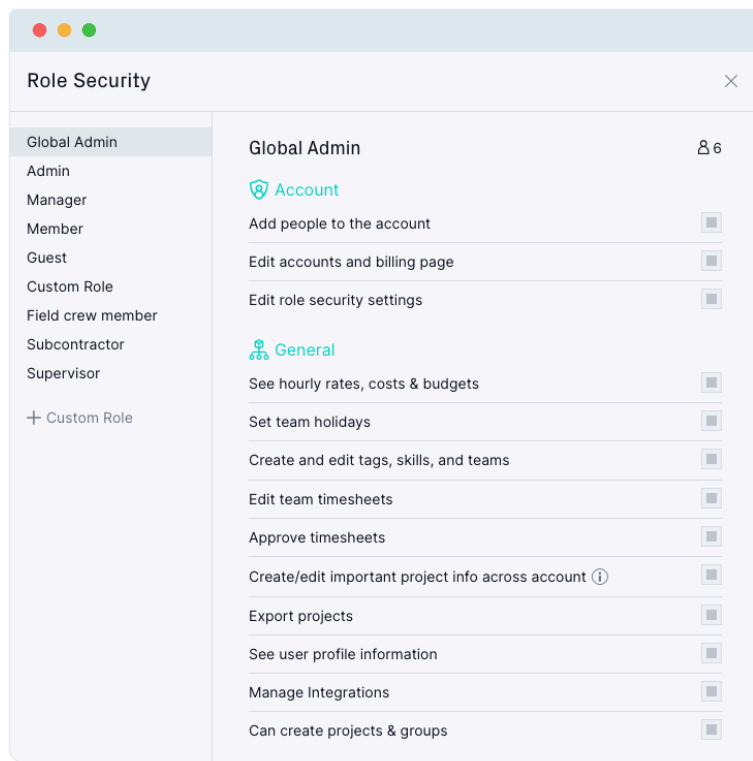

***For Enterprise customers only**

Custom, Guest & "None" Roles

Custom roles give you more flexibility beyond our standard roles. Once enabled, you can create as many custom roles as you'd like. Many customers use custom roles for clients, contractors, etc. They're available by default on the Enterprise plan and can be added as needed onto annual plans.

For example, you may want all of your standard roles to be able to create and edit tags, skills and teams, but you may not want to give that functionality to a client. Custom roles give you flexibility and control over what certain roles can do on the account security level.

Mike Smith

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$90 / hour

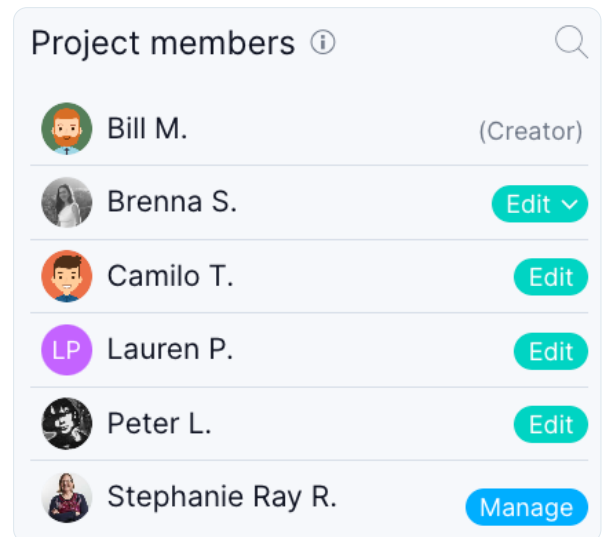| USER ROLE	None ▼
TEAMS (1)	Subcontractor ▼
SKILLS	Select ▼

NOTES

Resource-only role (placeholder)

Done

Guest licenses provide read-only access to ProjectManager to those who don't need full access. While guests cannot collaborate directly, they'll have access to data and key insights. Business edition users get 5 guest licenses and Enterprise users get unlimited guest licences.

Finally, you can assign the "none" role to your user-profiles that don't need to be afforded login access, but can still be assigned tasks within the software. Go to the Invite pop-up and fill out the info as needed. There's no email address required but they can be assigned to tasks or be assigned to actual hours on tasks.

Project Security

Project security allows you to define specific edit access per project by team member. It gives you more control and flexibility over individual team member access.

You can access project security by clicking the person icon (to the left of a filter icon) when viewing a project. Once selected, you'll see the users who have access to a project and their specific role in that project. You can easily add a person or a team by searching for their name.

Project members ⓘ

👤	Bill M.	(Creator)
👤	Brenna S.	Edit ⌄
👤	Camilo T.	Edit
LP	Lauren P.	Edit
👤	Peter L.	Edit
👤	Stephanie Ray R.	Manage

Project Member Roles

Manage: A user with manage access is given access to everything so that they can fully manage the project. This includes changing team member roles, editing important project information and deleting the project.
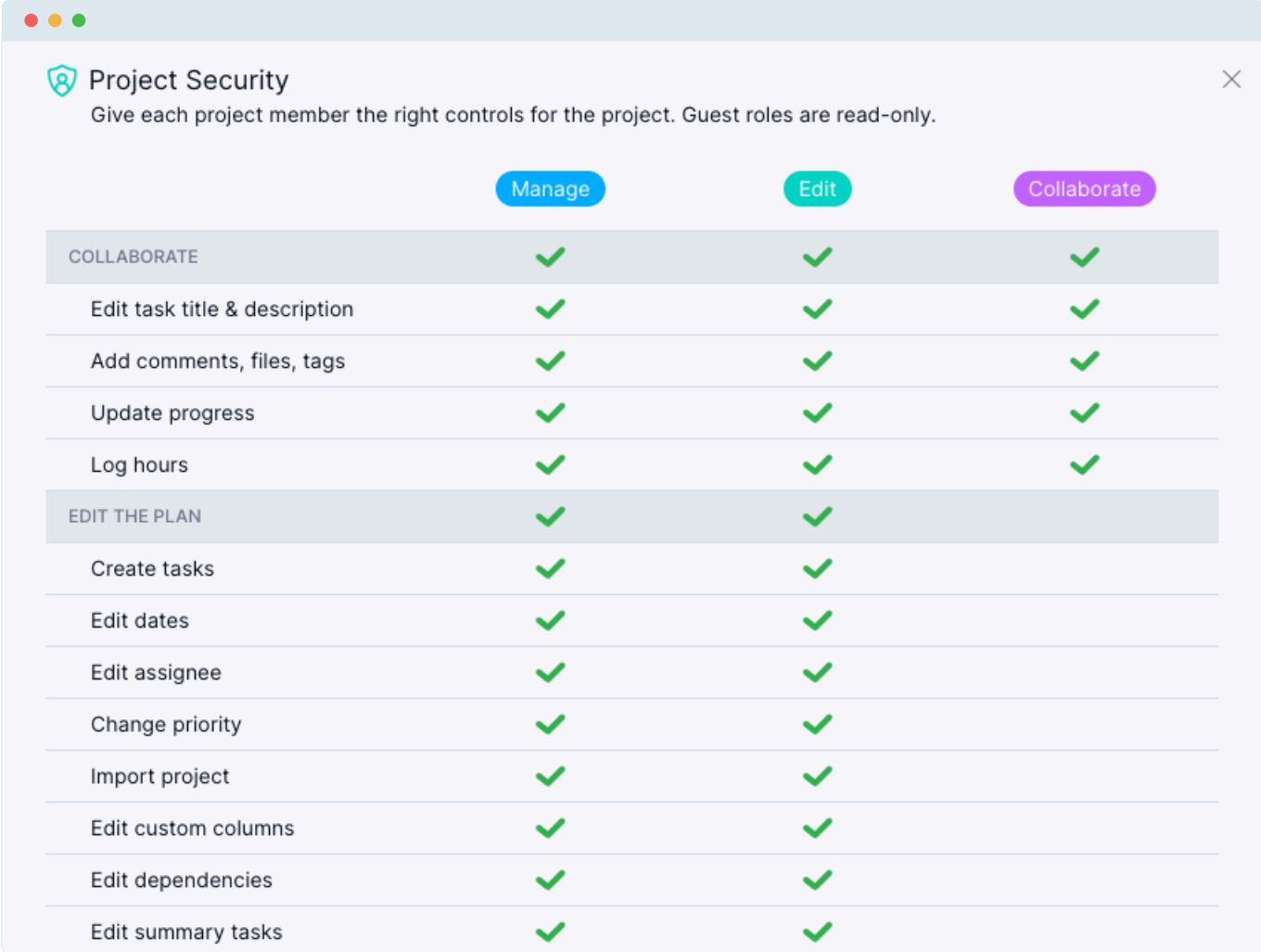
Edit: A user with edit access can't change member roles, edit important project information or delete the project. Edit is the default role and only users with manage access can change a user role.

Collaborate: A user with collaborate access can only edit task details, including progress, comments, files, tags and log hours.

How to Set Up Your Custom Security Settings

First, we recommend looking at your account security settings to ensure they're up to date for admins, managers and members. You can also set up any custom roles if you're on an Enterprise plan. Contact us to learn more about setting up custom roles.

Project Security	Manage	Edit	Collaborate
COLLABORATE	✓	✓	✓
Edit task title & description	✓	✓	✓
Add comments, files, tags	✓	✓	✓
Update progress	✓	✓	✓
Log hours	✓	✓	✓
EDIT THE PLAN	✓	✓	
Create tasks	✓	✓	
Edit dates	✓	✓	
Edit assignee	✓	✓	
Change priority	✓	✓	
Import project	✓	✓	
Edit custom columns	✓	✓	
Edit dependencies	✓	✓	
Edit summary tasks	✓	✓	

Give each project member the right controls for the project. Guest roles are read-only.

The default role for team members is edit. Your team will be automatically assigned the edit role for all projects to which they have access unless they're the project owner. You only need to take action if you'd like to switch the project manager role to another user or you'd like certain users to have manage or collaborate access.