CloudOffix

Access Rights Management for Project Cloud
Applications

Access Rights Management for Project Cloud Applications

Access rights in CloudOffix determine what users can view within specific applications. For Project Cloud, which encompasses the Project App, Timesheets App, and Resource Allocation App, access is primarily managed through user groups. These groups define permissions at the model level (e.g., projects, tasks, timesheets, allocations) and can be assigned during user creation or later via Settings app.

For detailed instructions on <u>creating a new user and assigning groups</u>, refer to the User Creation Guideline documentation: [[User Creation Guideline](#)]

Access Rights for Project Cloud Applications

Access rights are configured under Settings > Users & Companies > Users > Access Rights tab. To modify these settings, the user must be part of the *Administration / Access Rights* group.

If no access rights group is selected, the user will not be able to view or access the app.

The following sections outline the access rights and group inheritance for each Project Cloud application.

Project App

This app manages project creation, task management, milestones, risks, and collaboration.

- **Project / User:** Users in this group cannot access the Configuration menu in the Project App. They can view and interact with projects and tasks based on the following visibility rules:

- **Project & Task Visibility**
  - *Own Records:* Can view and edit all projects and tasks they have created.
  - *Public Projects (Privacy set to 'Visible by all employees' and 'Visible by following customers')*:
    - Can view the entire project and all tasks within it (including those created by others).
    - Can edit any task in the project.
  - *Projects where they are a Follower (on the project level, not task-specific follower)*:
    - Can view the full project and all its tasks.
    - Can edit any task within the project.
  - *Projects with Privacy set to 'On invitation only'*:
    - Cannot see the project itself or enter it.
    - Can only see tasks they are explicitly assigned to (assignment automatically adds them as a follower on the task).
    - If they are added as a follower to the general project (not task-specific) they view and edit projects/tasks.
  - *Risks*: Can view risks but cannot create or edit them.
  - **Functional Permissions:**
    - *Sprints*: Can view sprints but cannot create or edit them (if Sprint Management is enabled in Project App > Configuration > Settings).
    - *Backlogs*: Can create backlog tasks (if Sprint Management is enabled in Project App > Configuration > Settings).
  - Inherited tab
    - *Inherited Group:* Employees / Employee (automatically included when a user is assigned to the Project User group, ensures all Employees / Employee permissions are included)
- **Project / Manager:** Users in this group can access the *Configuration* menu in the Project App. They can view and interact with projects and tasks based on the following visibility rules:
  - **Project & Task Visibility:**
    - *Projects*: Can view and edit all projects (regardless of privacy settings or follower status).
      - Can create new projects.
    - *Tasks*: Can **view and edit all tasks** across all projects.
    - *Reporting Menu*: Can access the full Reporting menu for task analysis.
    - *Risks*: Can **view, create, and edit** risks.

- **Functional Permissions:**
  - *Sprints*: Can view, create, and edit sprints (if Sprint Management is enabled in Project App > Configuration > Settings).
  - *Backlogs*: Can view, create, and edit backlog items (if Sprint Management is enabled in Project App > Configuration > Settings).
  - Inherited tab:
    - *Inherited Group:* Project / User (ensures all Project User permissions are included)
- ➢ **Technical Settings / Use Subtask Project:** The *Employees / Employee* group automatically includes the *Technical Settings / Use Subtask Project* group when subtasks are enabled in the system settings.
  - As a result, *any user assigned to the Employees / Employee group* will be automatically granted membership in the *Use Subtask Project* group *if the subtask feature is activated* in Project App > Configuration > Settings > Enable 'Sub-tasks'.
  - This ensures that *all employees with any level of access in Project Cloud* (e.g., Project User) can create subtasks under parent tasks.

NOTE: If a project is created from a Sales Order, the assigned user must have at least '*Sales / User: Own Documents Only*' access in Sales to enter their assigned task. Without this, they will be *blocked* from opening the task, *even if they are the task assignee*.

NOTE: If a user has no Timesheets access rights, they cannot open any task (even one they created or are assigned to) because the Timesheets tab is part of the task form. The user must *have at least Timesheets / User access* to allow task access.

Timesheets App

This app handles time tracking, timesheet journals, approvals, and reminders, integrated with projects and tasks, as well as support tickets.

- **Timesheets / User:** Allows users to view and enter *only their own* timesheets; cannot enter timesheets for others.
  - Inherited tab:
    - *Inherited Group*: Employees / Employee (automatically included when a user is assigned to the Timesheets / User

group, ensures all Employees / Employee permissions are included)

- **Timesheets / Manager:** Grants full access to view all timesheet entries, enter timesheets on behalf of others, create and view timesheet journals, access the *Reporting* menu, and view the *Configuration* menu. This enables in-app configuration and the creation of Timesheet Reminders.
  - Inherited tab:
    - *Inherited Group:* Timesheets / User (ensures all Timesheets / User permissions are included)

Resource Allocation App

This app manages employee scheduling, capacity planning, and calendar integration for resource allocation.

- **Resource Allocation / User Document Reads Only:** Restricts users from accessing the Configuration menu, prohibits creating, deleting or editing resource allocations (only view/read), allows viewing only their own allocations (if assigned), and prevents viewing others' allocations.
  - Inherited tab:
    - *Inherited Group:* Employees / Employee (automatically included when a user is assigned to the Resource Allocation / User Document Reads Only group, ensures all Employees / Employee permissions are included)
- **Resource Allocation / User Documents**: Restricts users from accessing the Configuration menu, permits viewing, *editing*, and *creating* their *own* resource allocations (if assigned), and prohibits viewing allocations of other users.
  - Inherited tab:
    - *Inherited Group:* Resource Allocation / User Document Reads Only (ensures all Resource Allocation / User Document Reads Only are included)
- **Resource Allocation / Team Document:** Grants *department managers* access to view and manage resource allocations for their *own department*. If the user is not a manager of any department, they only have access to their own records and are authorized to create, delete, or edit them.
  - Inherited tab:

- ■ *Inherited Group:* Resource Allocation / User Documents (ensures all Resource Allocation / User Documents permission are included)
- ● **Resource Allocation / Manager:** Grants users *full access to all employee resource allocations*, including the ability to view, create, edit, and delete allocations for others. Additionally, users in this group can access the *Configuration menu*.
  - ○ Inherited tab:
    - ■ *Inherited Group:* Resource Allocation / Team Document (ensures all Resource Allocation / Team Document permissions are included)