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Psiterra | Knowledge Base Article

Projects - Custom Permission Set for a Schedule Template

How To:

How do I create a custom permission set for a Schedule Template?

Steps:

- 1. Navigate to the Schedule Template you would like to change.
- 2. Click the Permissions Tab.
- 3. Click the Manage Permissions Button.
- 4. This will open a popup window, as seen below

Project	Task	Documer	nts	Libraries	Bud
Permission Sets					
Add Permission Set					
				🤹 🛐 🔍	113713 🚺
	Name	Order 📥	Inactive		Description
] None		0		No permissions granted	
View		1		Can see the Schedule	
Edit		2		Can create new schedules, edit attributes, man allowed by task permissions, and set responsib	
] Manage		3		Same as edit plus inclu	des permissions to Set
Full		4		Same as Manage plus	can delete Schedules
Edit Dates		5		For editing dates.	

- 5. Click the Add Permission Set button.
- 6. Observe the new section that appears. Enter a name for the Permission Set, where in the list of sets it will appear, and a description. Click Submit to create the Permission Set.

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Project	Task	Docume	nts	Libraries	Bu
Permission Sets					
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		🧹 Submit	💢 Cancel		
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N	lame	Order 📥	Inactive		Description
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📑 Edit Dates		5		For editing dates.	

- 7. Now click the blue and white menu button to the left of the Permission Set and select Manage.
- 8. This menu controls what the Permission Set will allow users to do. Select the Actions that the Permission Set will allow. Now click Submit. The Permission Set can now be used in Schedule Templates

Actions - TEST			*
Action		Selected	
Archive/ Activate			
Create			
Gantt Chart			
Mark Deleted			
Set Baseline Dates			
Set Manual Dates			
Update			
View			
	Submit 🗙	Close	