

ProjectSolve^{SP} Access Permissions Matrix

The ProjectSolve^{SP} environment includes an access control system that allows site management to control access to a project site and various level of items associated with that site.

Out of the box, ProjectSolve^{SP} provides six levels of individual access controls to select from:

- **Full Control** – Provides the greatest level of abilities; users with “Full Control” can modify the site as they see fit. (This level of access requires addition training and user certification.)
- **Design** – Users with “Design” rights can view, add, update, delete, approve, and customize pages, tools and items as they need to.
- **Edit** – Similar to “Design” rights, users with “Edit” rights can view, add, update, delete, and customize tools (lists and libraries, but not pages) and items as required.
- **Contribute** – Allows users to view, add, update and delete items and documents within a list or library.
- **Read** – Users with “Read” rights can view pages and list items, as well as open or download documents that they have rights to.
- **View Only** – Similar to “Read” rights, but users with only “View” rights are not permitted to download the files they have access to look at.

Additionally, all new sites start with three automatically created security groups that provide the following levels of access to site members who are added to those groups:

- **Owner** – This group provides users with Full Control to the site as described above.
 - **Note:** This level of access can only be assigned to project personnel who have completed the full set of Administrator training and have passed the test required for certification.
- **Member** – This group provides users with “Edit” rights to the site, as described above.
- **Visitor** - This group provides users with “Read” rights to the site.

Security Groups can be created and modified as needed in order to identify logical groupings of users and to properly populate the site. When creating new sites, we recommend the following changes / additions be made to the groupings:

Group Name	Access Level	User Base	Notes
Owner	Full Control	Site Administrators	Only trained and certified personnel may be granted this level of access.
Member	Edit	Coordinators	Suggest renaming this group to be “Coordinators”
Contributor	Contribute	User / Power User	This is a new group and will typically contain the majority of users for a site.
Visitor	Read	Visitors	Read-only access to specific files and areas of the site.

The following page provides a breakdown of the basic access rights and what rights they have within a ProjectSolve^{SP} project site.

ProjectSolve^{SP} Access Permissions Matrix

General Access Rights

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Access ProjectSolve ^{SP}	✓	✓	✓	✓
Navigate ProjectSolve ^{SP}	✓	✓	✓	✓
Change Password	✓	✓	✓	✓
Save Password	✓	✓	✓	✓
Search a ProjectSolve ^{SP} Site	✓	✓	✓	✓
Refine a Search	✓	✓	✓	✓

File Management

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Access the File Menu	✓	✓	✓	✓
Access the Ribbon Bar	✓	✓	✓	✓
Download a File	✓	✓	✓	✓
Upload a File	X	✓	✓	✓
Create a File Within ProjectSolve ^{SP}	X	✓	✓	✓
Preview a File	✓	✓	✓	✓
View Files/Items	✓	✓	✓	✓
Check In / Check Out	X	✓	✓	✓
Edit a File	X	✓	✓	✓
View File Properties/Version History	✓	✓	✓	✓
Delete/Restore a File	X	✓	✓	✓

List/Library Management

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Access Existing Page Views	✓	✓	✓	✓
Modify Existing Page Views	X	✓	✓	✓
Create a New Page View (Private)	X	✓	✓	✓
Create a New Page View (Public)	X	X	✓	✓
Access the Quick Edit View	X	✓	✓	✓
Access the Item Menu	✓	✓	✓	✓
Access the Ribbon Bar	✓	✓	✓	✓
Add a New List Entry	X	✓	✓	✓
View the Properties for a List Entry	✓	✓	✓	✓
Edit the Properties for a List Entry	X	✓	✓	✓
Compare Versions in History	X	✓	✓	✓
Create a List or Library	X	X	✓	✓
Add a List Field	X	X	✓	✓
Modify a List Field	X	X	✓	✓
Configure Version Control for a List or Library	X	X	✓	✓

Page Management

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Sort Data in the View	✓	✓	✓	✓
Filter Data in the View	✓	✓	✓	✓
Create a New Site Page	X	✓ ⚠	✓	✓
Edit a Site Page	X	✓ ⚠	✓	✓
Add a Web Part	X	✓ ⚠	✓	✓
Delete a Web Part	X	✓ ⚠	✓	✓
Configure a Web Part	X	✓ ⚠	✓	✓
Save Page Changes	X	✓ ⚠	✓	✓

Site Management

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Create a Project Site	X	X	X	✓
Add a Custom Logo	X	X	X	✓
Change the Site Theme	X	X	✓	✓
Modify the Quick Launch Menu	X	X	✓	✓
Modify the Global Navigation Tabs	X	X	✓	✓
Create a Site Template	X	X	X	✓
Edit the Home Page	X	✓ ⚠	✓	✓

Permissions and Security

Activity	Visitor (Read)	Basic/Power (Contribute)	Coordinator (Member)	Owner (Full)
Setting Access Permissions at the Site Level	X	X	X	✓
Creating a New Security Group	X	X	X	✓
Adding a User to an Existing Security Group	X	X	X	✓
Changing the Access Level for a Security Group	X	X	X	✓
Creating a Custom Permission Set	X	X	X	✓
Setting Access Permissions at the Tool Level	X	X	X	✓
Security Trimming Access	X	X	X	✓