

Roles in BuildProjex

Members

Members of your BuildProjex team will typically be employees of your business. Each Member counts towards your total number of users, as determined by your pricing plan.

Members can be assigned various roles which give different permissions. Permissions control what a user can view, edit and delete.

Members can be assigned to one or multiple projects.

There are 4 different Member types:

System Administrator

A System Administrator has full oversight of the BuildProjex app. They are the “all-seeing eye”. They are also a “gatekeeper” – they control the status and permissions of other users.

By default, the first person who signs up to BuildProjex will be assigned System Administrator. The System Administrator can upgrade other users to System Administrator status. You must always have at least one System Administrator.

The System Administrator could be the business owner or Managing Director. Alternatively, the System Administrator role might be assigned to another senior member of the team who will then have total control over the project, contact and user details.

A System Administrator can add, view, edit and delete members and guests. They can add, view, edit and delete projects, files and folders, tasks, messages and Gantt charts.

A System Administrator can edit details of users and change permissions. They can switch users on and off. They can update the company profile. They can view contacts’ protected data.

A System Administrator can view all messaging channels and moderate chat messages.

Administrator

An Administrator can add users and create projects but cannot see and edit private files, tasks and messages as the System Administrator can.

An Administrator could be a more administrative member of the team who might set up projects and add users to BuildProjex.

An Administrator can add members and guests but cannot edit details of users and change permissions. They cannot switch users on and off.

An Administrator can create projects. They can view, edit and delete all projects. They cannot see private files and folders and cannot see private tasks.

They can view, edit and delete messaging channels on which they have owner/editor status. They can view and edit Gantt charts.

Power User

A Power User can work on specific projects to which they've been assigned. They can edit the project details, add people to the project and edit tasks and projects files.

You might assign this role to a Site Manager or other trusted member of staff who has a high level of involvement in one or multiple projects, but who doesn't need to set up projects or add users.

A Power User cannot add or edit users to BuildProjex. They cannot create projects and can only see projects to which they're assigned. A Power User can add people to projects. They can edit project details. They can create and assign tasks. They can edit tasks and project files. They cannot see private files and folders and cannot see private tasks.

A Power User can view, edit and delete messaging channels on which they have owner/editor status. They can view and edit Gantt charts.

User

A User's permissions are similar to a Guest's unless they are given owner/editor status on a Project. * Users count towards your user total in your pricing plan whereas Guests do not.

A User cannot add or edit users in BuildProjex. They cannot see all members and guests and cannot view and edit contacts.

A User can only see projects they're assigned to. They cannot create projects. A User can add people to projects and edit project details, if they've been set to owner/editor within the Project Team. They can create, assign and edit tasks and upload and edit project files, if they have owner/editor status. They cannot see private files and folders and cannot see private tasks.

A User can view, edit and delete messaging channels on which they have owner/editor status. They cannot create a direct message to guests. They can view the Gantt chart, if invited, and edit it, as long as they have owner/editor status.

* Owner/Editor Status is set from the Project Team settings on the Project Overview screen.

Guests

A Guest is different from a Member. Guests do not count towards your user total. A Guest has limited permissions which centre around viewing files, tasks and messages they've been assigned to/invited to see. A Guest may be a client, subcontractor or other professional you work with.

A Guest can edit their own profile, view their own contact details and see their login email. They can view a project to which they've been assigned. They can be assigned to one or multiple projects.

A Guest can view, comment on files and tasks to which they've been assigned. They can respond to chat messages. They can see the Gantt chart if they've been invited.