

User Types Editor

i User types are a very important concept in Projector. They define access rules, permissions, and notifications to groups of users - allowing you to make a change in one place and having it update many users at once.

Each user has a primary type that is displayed in reports and on dashboards. In addition, you can specify additional types if they fulfill multiple purposes in your organization. For example, I might be primarily an administrator for the entire organization, but I might also be a project manager for our main office. In the screenshot below you can see that this person is primarily a Project Manager, but is also a Finance Manager. The permission sets are additive, so adding more types expands your permissions.

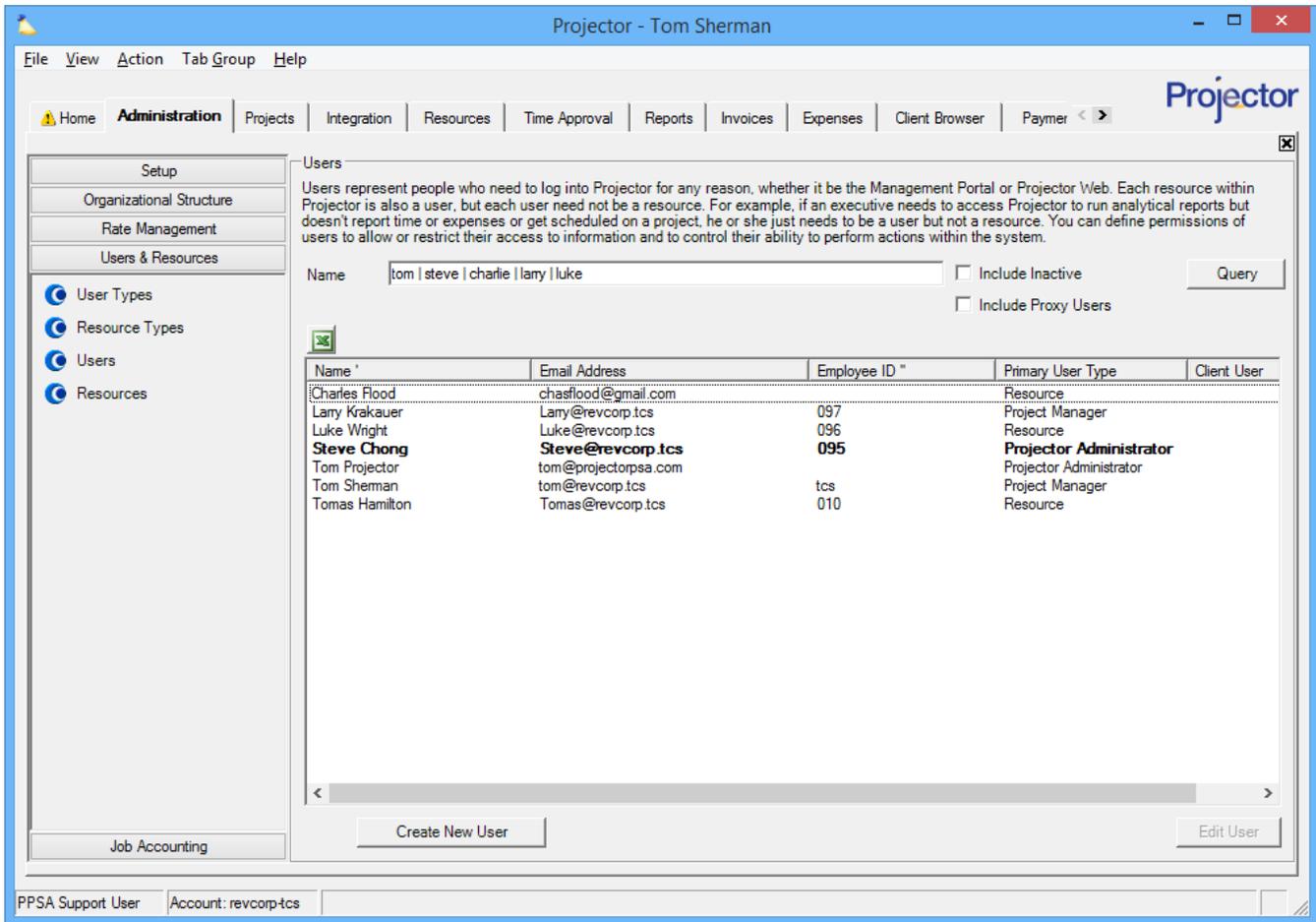
User Types	User Type Overrides	Contact Information
Primary User Type		Cost Center
Project Manager	(Entire Organization)	
Additional UserTypes		Cost Center
Finance Manager	RevCorp US	Delete
	(Entire Organization)	

The final special thing about user types is that they can be applied on a [cost center](#) basis. In the screenshot above you can see that this user is the Finance Manager, but only for the Revcorp US cost center. This level of granularity and inheritance is invaluable to large organizations where someone may wear several hats across cost centers.

When you need to update someone's permissions, the first place your mind should turn is the User Type editor. You might tweak an existing type to expand or restrict permissions, give the user another type, or create an entirely new type.

As not every user is going to neatly fit into a type, you can perform line-item permission overrides for individual people through the [User Editor](#).

This form is reached from the menu by choosing **View | Administration**. Go to the **Users & Resources** subsection and then **User Types**



Permissions and Settings

To make changes to user types you must have the [global permission Users and Permissions](#) set to **Update**.

You can override permissions on a line-item basis through the [User Editor](#).

You can generate a list of your users, as well as their permissions, with a [User Report](#).

You can [distribute reports](#) based on user type.

The dashboards tab is only editable if you have the [Advanced Analytics module](#) enabled.

Manage User Types

Manage your user types. Tick the **Include Inactive** checkbox to show inactive types.

User Types

User types allow organizations to define permissions and other default behaviors at a global level. User types can then be assigned at a cost center level to individual users, thus defining the access rights that will be granted to that person.

Include Inactive



User Type Name	
Resource	
Projector Administrator	
Delivery Manager	
Finance Manager	
Project Manager	
Resource Manager	
Scheduler	
Client	
Projector Support	

Add User Type

Click the **Create New User Type** button.

Edit User Type

Double click on an existing type.

Reorder User Types

Select any user type and use the up/down arrow buttons. This changes the order that they are displayed in dropdown lists.

Delete User Type

Right click a user type and choose **Delete Type**. You cannot delete a type that is currently assigned to someone. You can mark it inactive instead.

Inactivate User Type

Edit a user type and tick the **Inactive** checkbox. An inactive type cannot be assigned to users, but any existing users with this type will continue to have it. If you want to completely remove the type, you should run a [User Report](#) and filter on everyone with the type you wish to deactivate. Then reassign them.

User Type Fields

The table explains the fields:

Control	Description
User Type Name	Enter an appropriate name. For instance, scheduler or project manager or contractor.
Inactive	Tick the checkbox to prevent this type from being assigned to any additional users. Users currently with the type will keep it.