

Role Types Editor

i A role on a project describes who will be delivering a portion of a project. That could be a project manager, a support engineer, or anything you can imagine. Role Types allow you to quickly populate new roles with required criteria. For example, I need an engineer from the software department in London or Cambridge. To learn more about roles, see [Roles](#).

Below is a list of all the criteria you can specify.

- Departments
- Titles
- Cost Centers
- Locations
- Resource Types
- Skills
- Allocation Percentage
- Billing Title

You can also set your preferred criteria. For example, although this role could be filled from many locations, I prefer one from the Boston office.



Management Portal

The Management Portal does not support the concept of Role Types. You'll need to use Projector Web to leverage these features.

The role type editor is reached by choosing **Administration | Users & Resources | Role Types**.

Projector - RevCorp-org3UX

File View Action Tab Group Help

Home Administration Project Dashboard Projects Reports Integration Expenses

Setup
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Role Types

Role Types are used for two purposes: to analyze types of roles created across projects and for templating purposes. When creating roles, Role Types ensure that key information is quickly filled in without requiring a lot of immediate input by the person creating the role. Of course, that information, such as the various role criteria, can be easily changed later.

Name	Description	Active	Edit	Delete
Project Manager		<input checked="" type="checkbox"/>	Edit	Delete
Developer		<input checked="" type="checkbox"/>	Edit	Delete
QA Lead		<input checked="" type="checkbox"/>	Edit	Delete
Creative Lead		<input checked="" type="checkbox"/>	Edit	Delete
Technical Architect		<input checked="" type="checkbox"/>	Edit	Delete
New				

PPSA Support User Account: revcorp-org3UX Projector

Permissions and Settings

Updating Role Types requires the [global permission System Settings](#) set to **Update**.

There are a few places to view and manage roles in Projector. Note that Management Portal does not support Role Types.

- Projector Web
 - Topics | [Roles](#)
 - Projects | [Roles](#)
- Management Portal
 - [Resourcing Dashboard](#)
 - Project | [Roles tab](#)

Role Types come into play when creating new roles. To create new roles, view any [project](#) in Projector Web and go to the Roles tab. Click **+Add Roles...**

The screenshot shows the Projector Web interface for managing roles. At the top, there is a project selection dropdown showing '(bug) Acme - Inventory Tracking System Beta Release (P001101-001)'. Below this are navigation tabs: Project Summary, Roles, Schedule, Performance Analysis, Invoicing Summary, Notes, and Project Workspaces. A toolbar contains buttons for '0 roles selected', 'As a Scheduler', 'Assign...', 'Edit Hours...', 'Reject...', 'Approve...', 'Finalize...', '+ Add Roles...', and 'Additional Actions'. A 'Layout' dropdown is set to 'Default'. Below the toolbar is a 'Project Role Information' section with a 'Template | Project Role View' dropdown. The main area contains a table with the following data:

<input type="checkbox"/>	Project Role Name ^	Resource	Resource Primary Cost Center	Title	Resource Type	Location	Role Start Date	Role End Date
<input type="checkbox"/>	QA	Max Yang	West Coast	Technical Consultant (Su...	Salaried	Springfield		

Manage Role Types

The main screen shows all role types in your installation. From here you can add, edit, delete, and inactivate.

Add

Click the **New** button.

Delete

Click the **Delete** button. If you cannot delete a role type then it has been used at least once to define a role. You should inactivate it instead.

Inactivate

Edit the role and tick the **Inactive** checkbox.

Edit

Click the **Edit** button.

Notice in the screenshot the green chevron . This indicates the preferred choice. To set your preferred choice, right click and choose **Set preferred**.

The table below explains each of the criteria.

Edit Role Type [Close]

Name: Inactive

Description:

Titles
 Principal Technica

Cost Centers
 RevCorp US

Locations
 Springfield

Resource Types
 Manager

Skills

Keywords

Creative

- Creative Director
- Designer
- Information Architect
- Site Builder

Management

- Managing Partner
- Administrator

Technology

- Principal Technical Consultant
- Senior Technical Consultant
- Technical Consultant
- Associate Technical Consultant

Allocation Percentage:

Base Rates On Title:

Field	Description
Name	Name this role type. This is also the default name applied to new roles. For example, if I made three new Manager roles, they'd be named Manager, Manager 2, Manager 3.
Description	Enter a description to help you remember what this role type is for
Titles	Select the department and titles that can fulfill this role. At least one is required.
Cost Centers	Select the cost centers this role can be fulfilled from. At least one is required.
Locations	Select locations this role can come from. At least one is required.
Resource Types	Select resource types for this role. Optional.
Skills	Select skill levels for this role. Optional.
Keywords	<p>Keywords are used to search resumes. At least one resume must match the keyword search for a resource to be returned. Optional.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p> There is a performance penalty to performing keyword searches as it requires searching all documents associated with resources. Searches for resources that match this role will be a bit slower.</p> </div>
Allocation Percentage	When roles are created, allocate this percentage of their normal working hours. For example, if a resource typically works a forty hour week then an allocation percentage of 50% results in a 20 hour week.
Base Rates on Title	Override the default title and rate for this role to another one. For example, a junior engineer could bill at a senior engineer's rate.