Role Types Editor

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**.

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...**

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.

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	Keywords are used to search resumes. At least one resume must match the keyword search for a resource to be returned. Optional. ⓘ 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.
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.