



Learn Permission Sets and Info Exchange Access

This webinar was presented by Newforma's Stephen Komisarek on Permission Sets and setting up Info Exchange access for members of the Project Team. Permission Sets control what a user can see and do in Newforma Project Center and on your company's Info Exchange Website. Learn how to view, create, and modify Permission Sets in Newforma Project Center. We'll also cover adding members to the Project Team and giving them access to your Info Exchange website.

Join us to learn:

- What Are Permission Sets?
- View, Create, and Modify a Permission Set
- Project Team and Info Exchange Website Access

Details

Title: *Permission Sets and Info Exchange Access*

Date: June 30, 2015

Time: 2:00 PM EDT



Questions & Answers

Q: Can a reusable group be created for use on multiple projects?

A: Yes. Groups and Project Team members can be imported from one project to another.

Q: I'm not seeing the Project Center Administration in my TASK pane.

A: This is likely because you are not a global administrator. Please contact your company's Newforma administrators.

Q: Can you have more than one Global Administrator?

A: Yes. You can have as many as needed. There is no additional licensing or cost.

Q: How many Permission Sets can be created?

A: There is not a maximum number of Permission Sets that can be created.

Q: Is there a way to compare and visualize differences in permission sets, other than clicking through the Matrix individually and documenting?

A: There is not a compare tool for Permission Sets but you can run a report of all Permission sets to help achieve this. We'll add this as a feature request for a future version.

Q: How do I change a Permission Set for multiple users at once?

A: In the Project Team Activity Center, select the users then right-click > Change Field Values > Permission Set.

Q: What happens if a Permission Set is deleted?

A: A Global Administrator will need to apply a Permission Set for those users that it affected. This can be done on multiple users.

Q: Can an external team member change their settings?

A: External team members cannot change their Permission Set nor what they can/cannot see on the Info Exchange website. External users can modify their contact information and what is displayed to other team members.

Q: Is there a quick way to see what Permission Sets are assigned in the Project?

A: Yes. In the Project Team Activity Center, Add the Permission Set column to the view then sort or filter.

Q: Do Global Administrators have to be members of Confidential projects to manage them?

A: No. Global Administrators have the ability to manage all projects through Project Center Administration.

Q: Can you hide an internal user even from other internal users?

A: All users can be hidden from view in the Contact Directory but cannot be hidden from view in the Project Team.