Manage Permission Templates

Objective

To manage company and project permission templates.

Background

In Procore, Role-Based Permissions (RBP) are used to manage user access to different Procore tools. Access for each role is defined in a permission template. By default, Procore provides its clients with several role-based permission templates. For details, see What is a permission template? and What are the default permission templates in Procore?

If your company wants to modify the existing default permission templates in Procore or if you want add and manage your own templates to fit your specific needs, review the topics below.

Things to Consider

• Required User Permissions:
  ○ To create or edit permission templates:
    ▪ ‘Admin’ level permissions on the Company level Directory tool.
  ○ To assign and manage permission templates for project users:
    ▪ ‘Admin’ level permissions on the Project level Directory tool. See Project Directory below. OR
    ▪ ‘Standard’ or ‘Read Only’ level permissions on the Project level Directory tool with the 'Manage Permission Templates (Assignable Only)' granular permission enabled on your permission template.

• Limitations:
  - Permission templates must be added and edited in the Company level Directory tool.

• Additional Information:
  - Permission levels (e.g., None, Read Only, Standard, Admin) define what information users can edit and see in each Procore tool.
  - You can also grant granular task permissions for the ‘Read Only’ and ‘Standard’ level permission on a limited number of supported Procore tools. See Grant Granular Permissions in a Permission Template.
  - You can create custom reports using data from the Company Directory that include a user's default permission template. See Create a Custom Company Report for more information on how to create a custom report.
Tasks

Company Directory

When managing permission templates in Procore, you can perform the following tasks in the Company Directory:

- Add a New Permission Template to the Company Directory
- Edit a Permission Template in the Company Directory
- Grant Granular Permissions in a Permission Template
- Assign a Permission Template to a User in the Company Directory
- Delete a Permission Template from the Company Directory
- Export Permission Templates to PDF

Project Directory

You can also perform a limited number of management tasks in the Project Directory:

- Assign a Permission Template to a Project User
- Change a Project User's Permission Template
- Create a Project Permission Template in the Project Directory

Frequently Asked Questions

- What are role-based permissions?
- What is a permission template?
- What are the default permission templates in Procore?
- What are the default permission levels in Procore?
- Which Procore tools support Granular Permissions?
- How do I create a new project permission template in the Project Directory?
- Can I provide users with 'Read-Only' level permission with limited access to update information in Procore?