Create a Project Permission Template from the Project Directory

Objective

To create a project permission template from the Project Directory.

Background

If you been granted the appropriate access permissions to the project's Directory tool, you can create a new project permission template when editing any user's contact information in the Project Directory. To do this, see the Steps below. Its important to be aware that these steps only permit you to create a template. It does NOT allow you to modify the access permissions defined in the new template. To do that, you must work with one of your company's designated Procore Administrators (i.e., users 'Admin' level permissions on the company's Directory tool) who then follows the steps in Edit a Permission Template in the Company Directory.

Things to Consider

- **Required User Permission:**
  - 'Admin' level permissions on the Project Directory.

Demo

Steps

1. Navigate to the project's Directory tool.
2. Locate a user who you want to create a new permission template for. Then click **Edit**.
3. Scroll to the **Project Permission Templates** area.
4. Select **New Project Permission Template** from the menu.

5. Name your new template in the popup window that appears. Then click OK. The system creates a new project template. To modify the access permissions defined in the new template, you must have the appropriate level of permission to the Company Directory. See [Edit a Permission Template in the Company Directory](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/create-a-project-permission-template-fr...).

---

**Next Step**

- [Edit a Permission Template in the Company Directory](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/create-a-project-permission-template-fr...)

---

**See Also**

- [Manage Permission Templates](https://support.procore.com/products/online/user-guide/project-level/directory/tutorials/create-a-project-permission-template-fr...)