

**Dorset Portfolio
Management Office**

Celoxis

**User Types and
Access Controls**



Celoxis Users and Access

Contents

Licensed Users

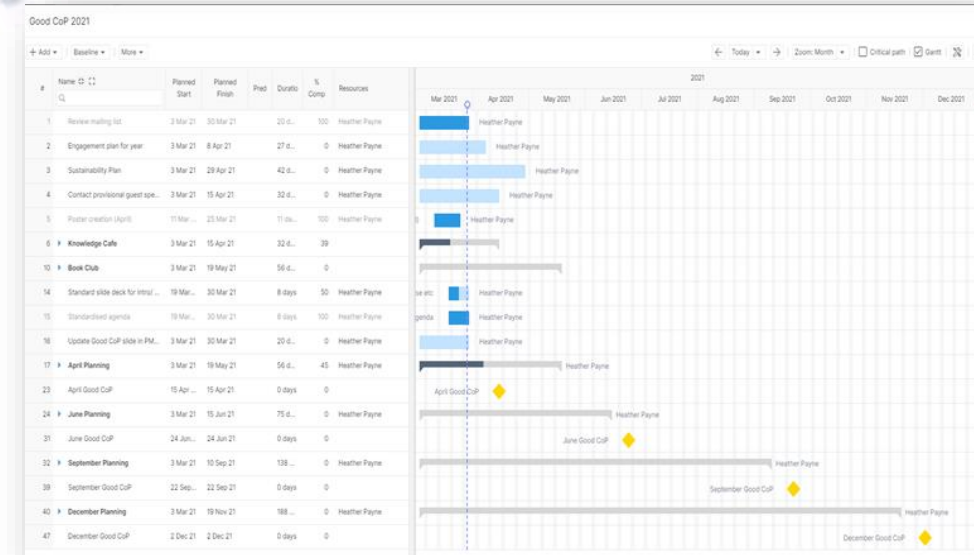
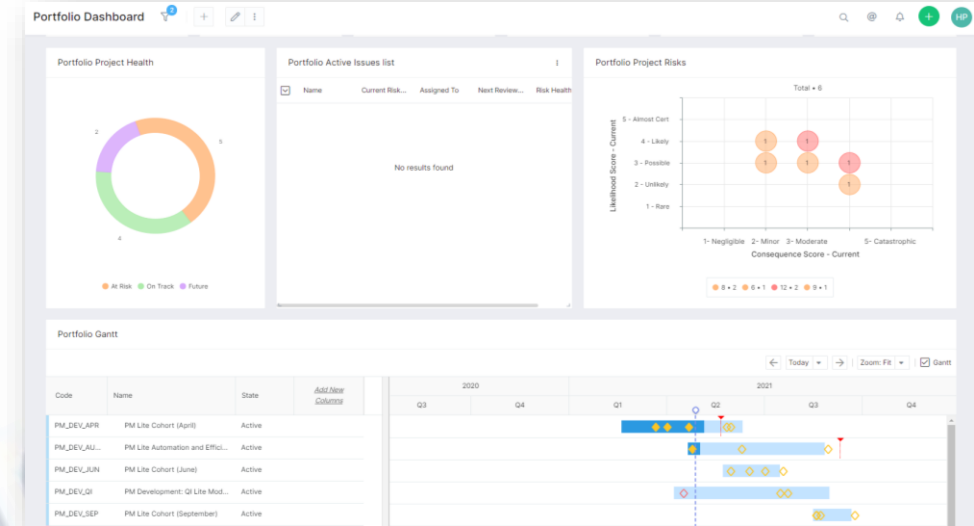
Virtual Users

Clients

Access Control

Click to jump to a section

Use the 'Home' button to come back here



Licensed Users >>>

Licenced Users

Licenced users are given an account to login and have access to a full suite of features.

Dashboards

- View and make updates in dashboard screens
- Can print dashboards for reporting outside of Celoxis

Creating

- Create projects, tasks, risks, lessons etc.
- Personalise your account settings, notifications and calendar

Editing

- Editing the same as creating
- Filter and run reports
- Make changes to any projects where you are listed as team

Licenced users are able to use the 'Comments' and 'Discussion' (coming soon) features to communicate with each-other in Celoxis. Use the @ function and chat with your project team or request updates on tasks and risks.

Virtual Users

Virtual users are not given an account to login but can be assigned tasks and update progress by email. You can do this from the Interactive Gantt

The screenshot shows the 'Assign Resources' dialog box in the center, which is used to assign resources to selected tasks. The dialog box contains the text 'Assigns the following resources to the selected tasks' and a search field for 'Resource *'. Below the search field, two options are listed: 'David Shears' and 'Virtual Team Member'. The 'Virtual Team Member' option is highlighted. The dialog box has 'CANCEL' and 'SUBMIT' buttons at the bottom. To the left and right of the dialog box are screenshots of the Interactive Gantt interface. The left screenshot shows a context menu open over a task, with the 'Resources' option selected, and the 'Assign Resources' option highlighted. The right screenshot shows the same context menu open over a task, with the 'Status Update' option selected, and the 'Request Update' option highlighted. A yellow callout box on the left side of the screenshot contains the text: 'A virtual user must be added as a member of the project team to assign tasks to them'. The background of the screenshots shows a Gantt chart with various tasks and their durations.

Celoxis only accepts *plain text* so you must remind your virtual users to delete their signature when replying to the email.

Progress Emails

Virtual users are not given an account to login but can be assigned tasks and update progress by email.

Edit the subject of the reply too

The request brackets are removed and the & update added after the task name in brackets

[Task Update Requested] First Working Framework output Complete [P:KE Project training test]

Celoxis Notifications <nobody@celoxis.com>
To: PMO Team (Dorset CCG)

Task: First Working Framework output Complete

HP Task progress update is requested.
Heather Payne

Update Progress

Priority	Normal
ID	28018353
Project	KE Project training test
Planned Start	16 Jun 21
Finish	30 Jul 21
% Comp	0%
Planned % Comp	0%
Kanban State	Backlog
Area of activity/workstream	Task RAG

View Task

Reply to the email rather than pressing 'Update Progress'

RE: First Working Framework output Complete [%:50] [P:KE Project training test]

PMO Team (Dorset CCG) <PMO@dorsetccg.nhs.uk>
To: Heather Payne via Celoxis

This is a test

From: Celoxis Notifications <nobody@celoxis.com>
Sent: 23 April 2021 10:54
To: PMO Team (Dorset CCG) <PMO@dorsetccg.nhs.uk>
Subject: [Task Update Requested] First Working Framework output Complete [P:KE Project training test]

Task: First Working Framework output Complete

HP Task progress update is requested.
Heather Payne

Update Progress

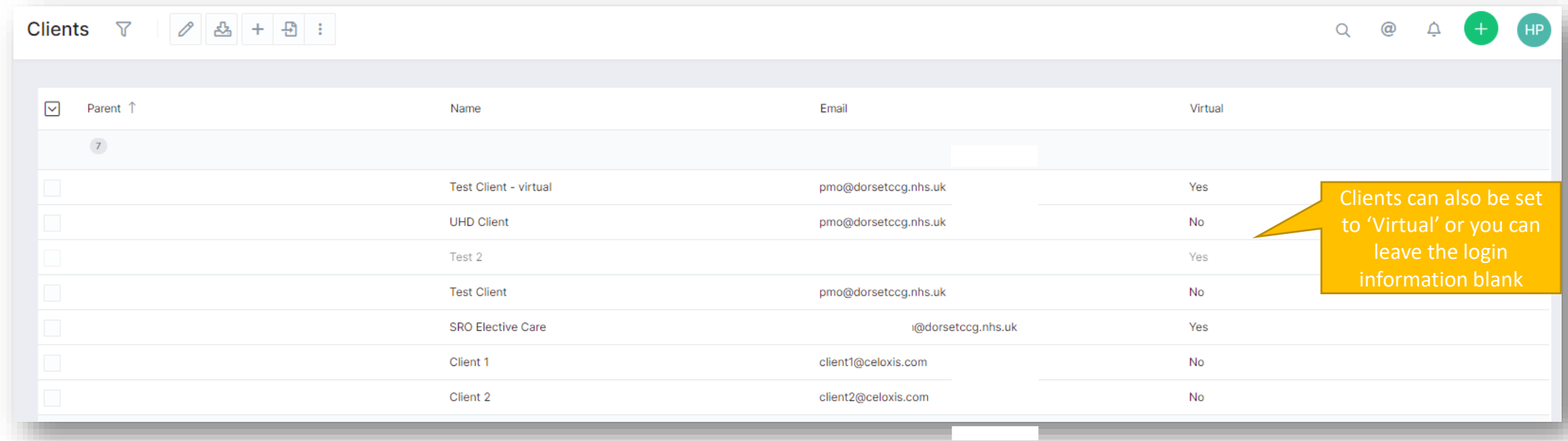
Priority	Normal
ID	28018353
Project	KE Project training test
Planned Start	16 Jun 21
Finish	30 Jul 21
% Comp	0%
Planned % Comp	0%
Kanban State	Backlog

You can also add comments

Celoxis only accepts *plain text* so you must remind your virtual users to delete their signature when replying to the email.

Clients

Clients can be given a login to view reports and dashboards, view task progress and information and if permitted, update task progress.

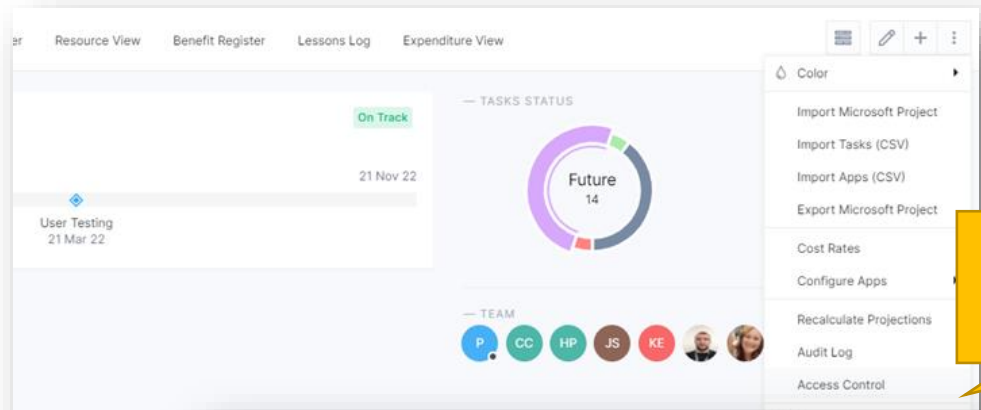


The screenshot shows a web interface for managing clients. At the top, there's a header with the title 'Clients' and several icons for filtering, editing, adding, deleting, and a menu. On the right, there are search, user, notification, and profile icons. Below the header is a table with the following columns: a checkbox for selection, a 'Parent' column with an upward arrow, 'Name', 'Email', and 'Virtual'. There are 7 rows of data. A yellow callout box points to the 'Virtual' column with the text: 'Clients can also be set to 'Virtual' or you can leave the login information blank'.

<input checked="" type="checkbox"/>	Parent ↑	Name	Email	Virtual
<input type="checkbox"/>	7	Test Client - virtual	pmo@dorsetccg.nhs.uk	Yes
<input type="checkbox"/>		UHD Client	pmo@dorsetccg.nhs.uk	No
<input type="checkbox"/>		Test 2		Yes
<input type="checkbox"/>		Test Client	pmo@dorsetccg.nhs.uk	No
<input type="checkbox"/>		SRO Elective Care	i@dorsetccg.nhs.uk	Yes
<input type="checkbox"/>		Client 1	client1@celoxis.com	No
<input type="checkbox"/>		Client 2	client2@celoxis.com	No

If you do not want clients to login, they can be sent reports by email and do not need to have an account created.

Access Control



Access Control

Roles		Permissions						
		Edit	Delete	Add Task	View Financials	Add/Edit Financials	Baseline	View
Project Manager		✓	✓	✓	✓	✓	✓	✓
Project Team				✓	✓	✓	✓	✓
Staff								✓
Accountant								
Executive					✓	✓		✓
External Users					✗	✗		
PM					✓	✓	✓	✓
Project sponsor								
Project viewer								✓

You can see the pre-set permissions. Click on the group icon to add or remove members from roles

