Dorset Portfolio Management Office

Celoxis

User Types and Access Controls

Celoxis Users and Access

Contents

Licenced Users

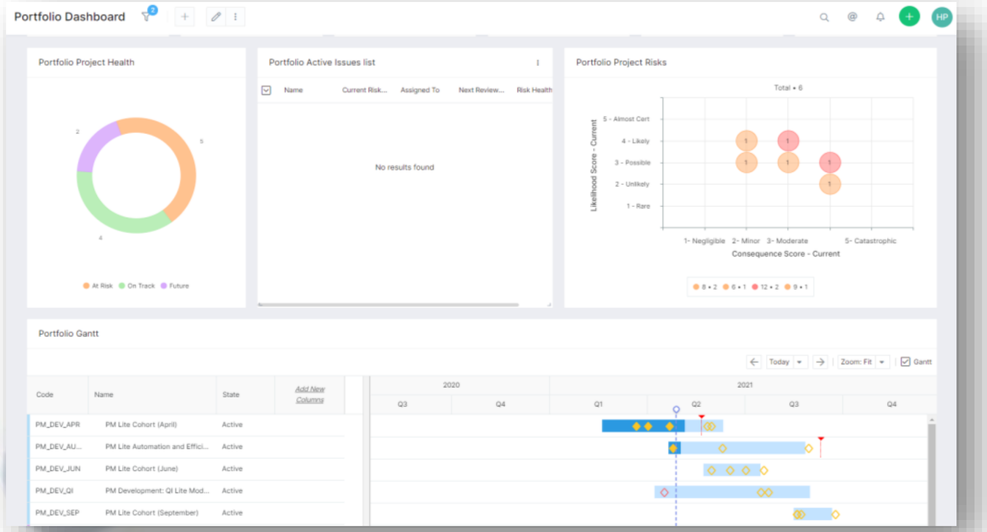
Virtual Users

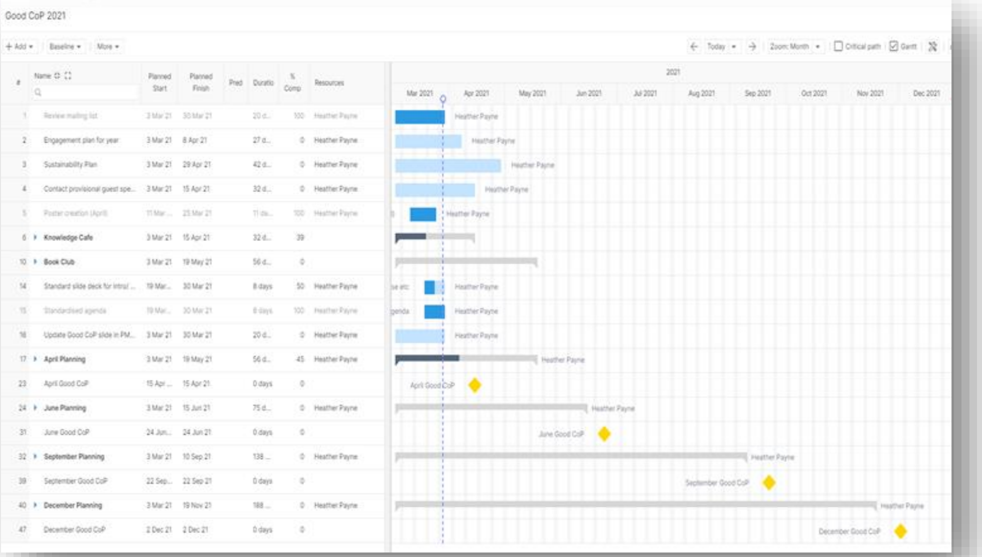
Clients

Access Control

Click to jump to a section

Use the 'Home' button to come back here





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

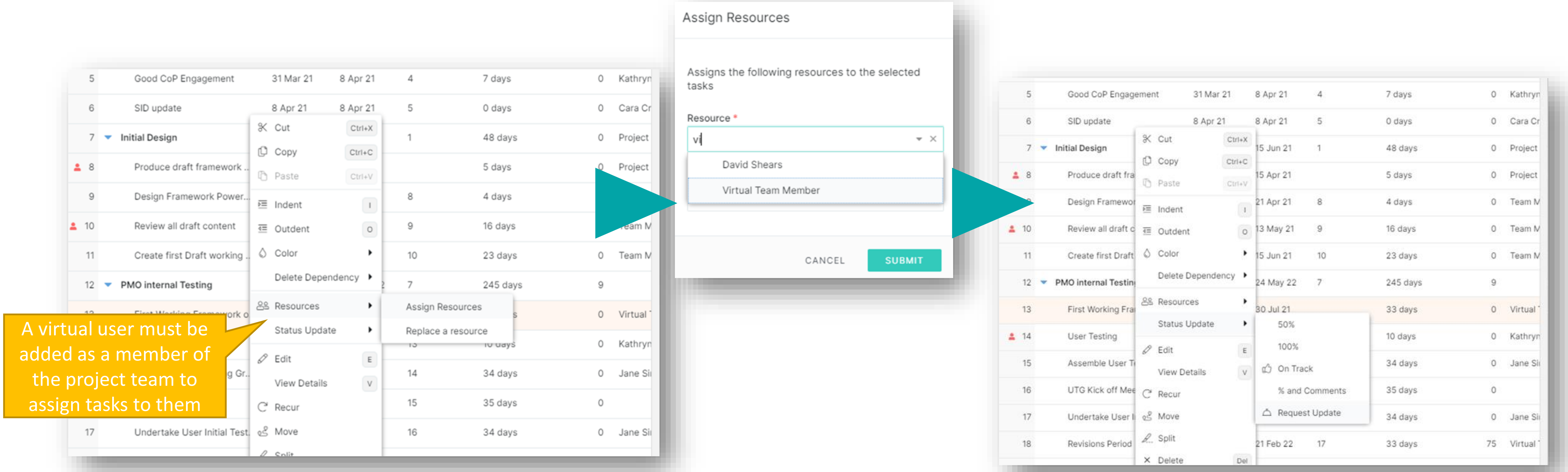
- Editing the same as creating
- Filter and run reports
- Make changes to any projects where you are listed as team

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

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



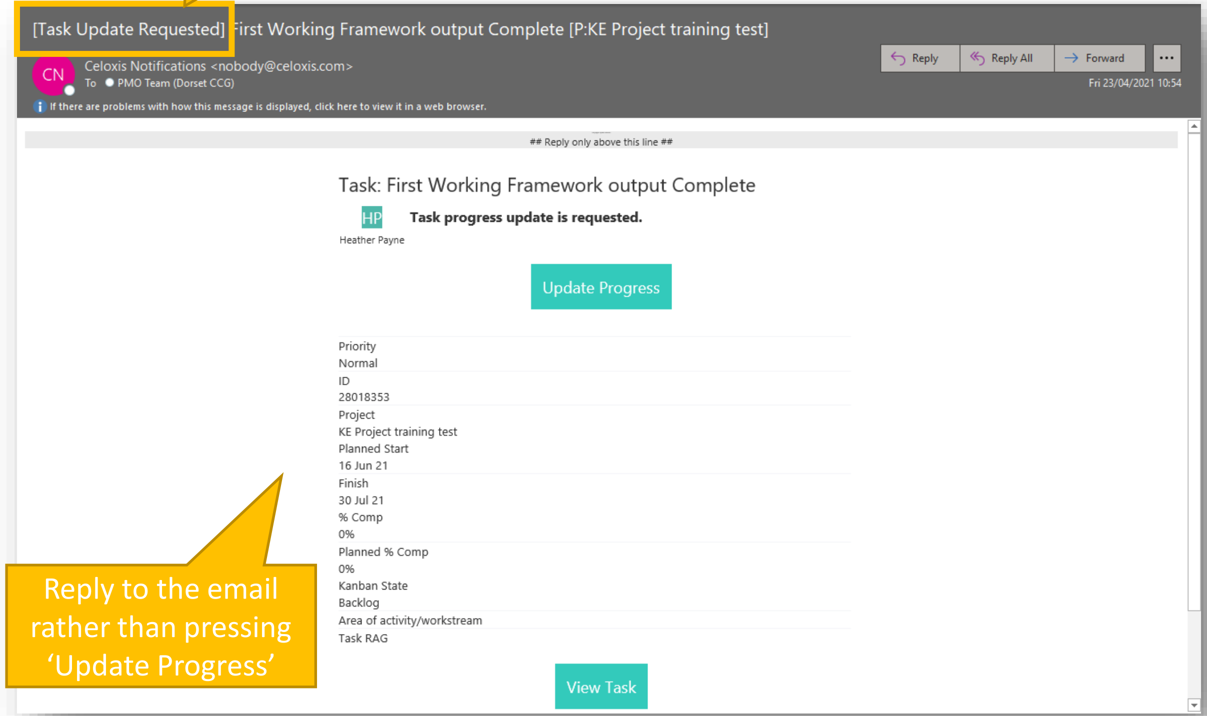
Celoxis only accepts *plain text* so you must remind your virtual users to delete their signature when replying to the email.

Progress Emails

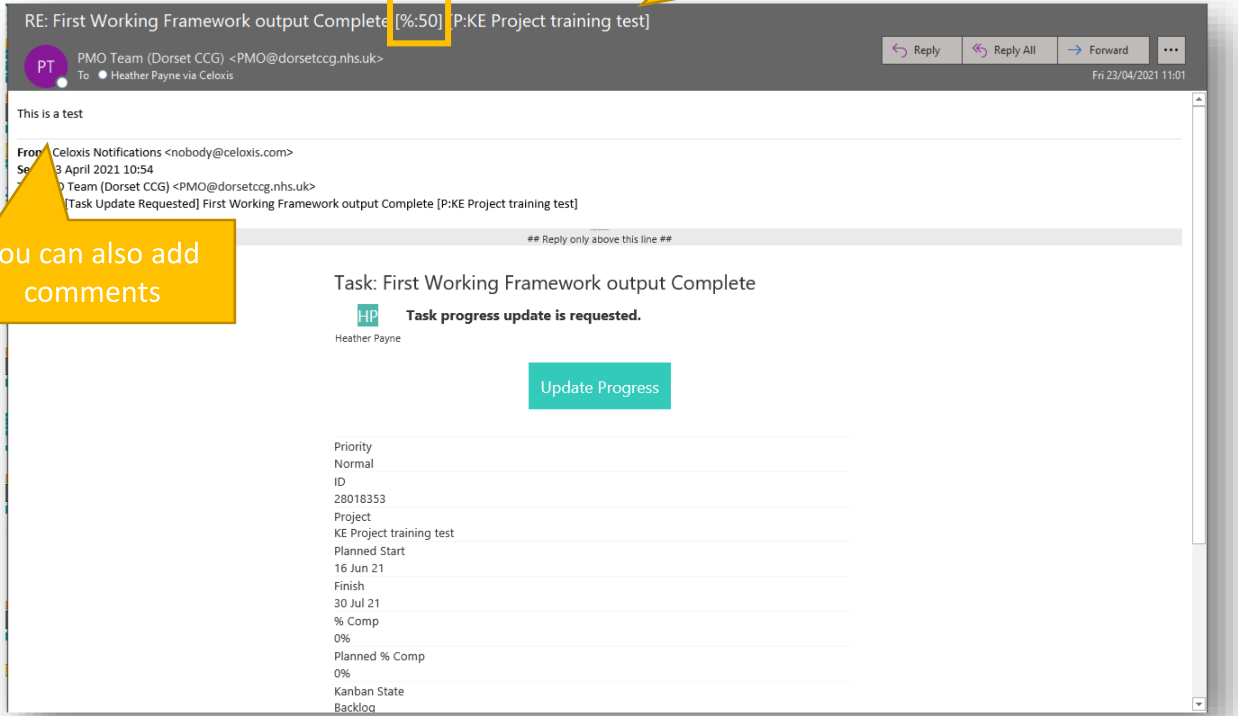
Edit the subject of the reply too

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

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



Reply to the email rather than pressing 'Update Progress'



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 <u>can</u> be given a login to view reports and dashboards, view task progress and information and if permitted, update task progress.

Clients

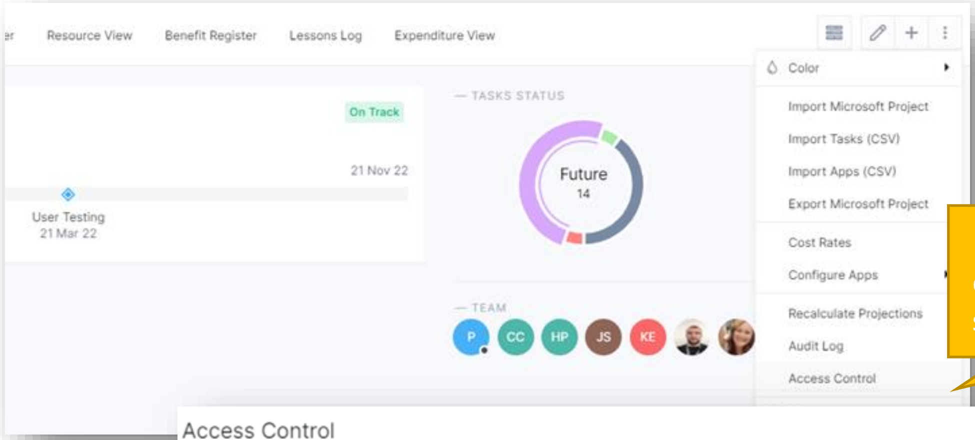
Parent	Name	Email	Virtual
7			
	Test Client - virtual	pmo@dorsetccg.nhs.uk	Yes
	UHD Client	pmo@dorsetccg.nhs.uk	No
	Test 2		Yes
	Test Client	pmo@dorsetccg.nhs.uk	No
	SRO Elective Care	@dorsetccg.nhs.uk	Yes
	Client 1	client1@celoxis.com	No
	Client 2	client2@celoxis.com	No

Clients can also be set to 'Virtual' or you can leave the login information blank

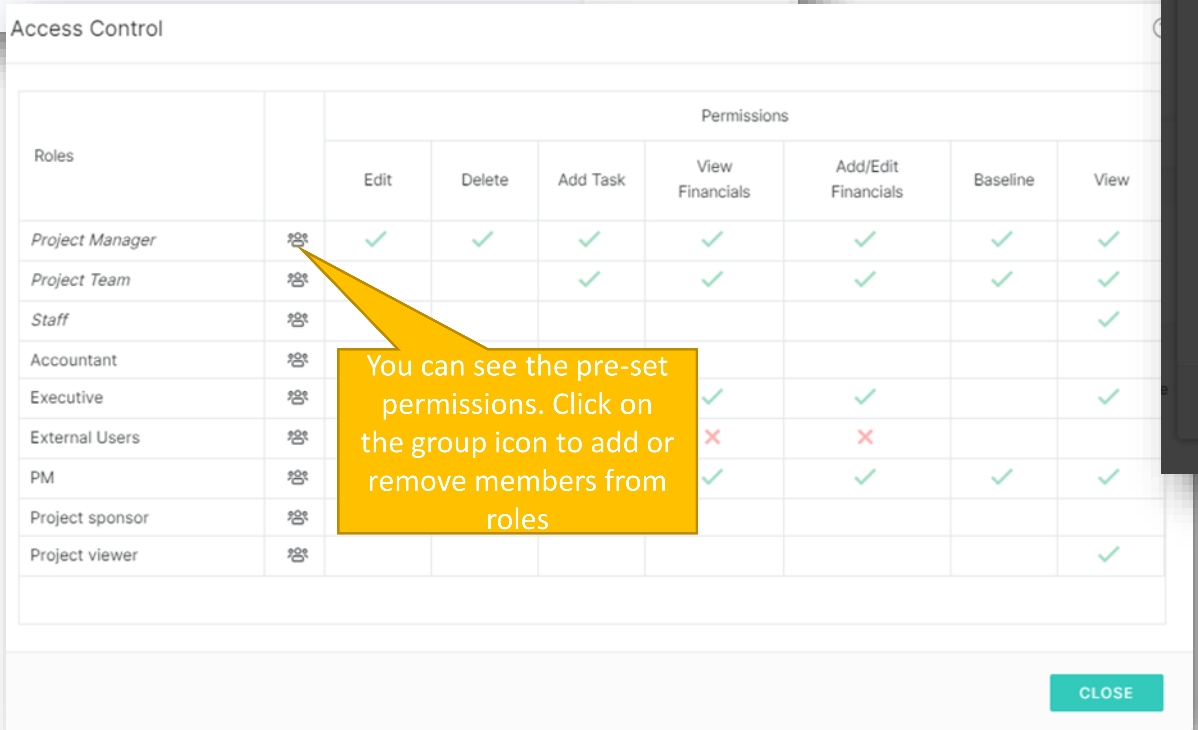
If you do not want clients to login, they can be sent reports by email and do not need to have an account created.

Access Control

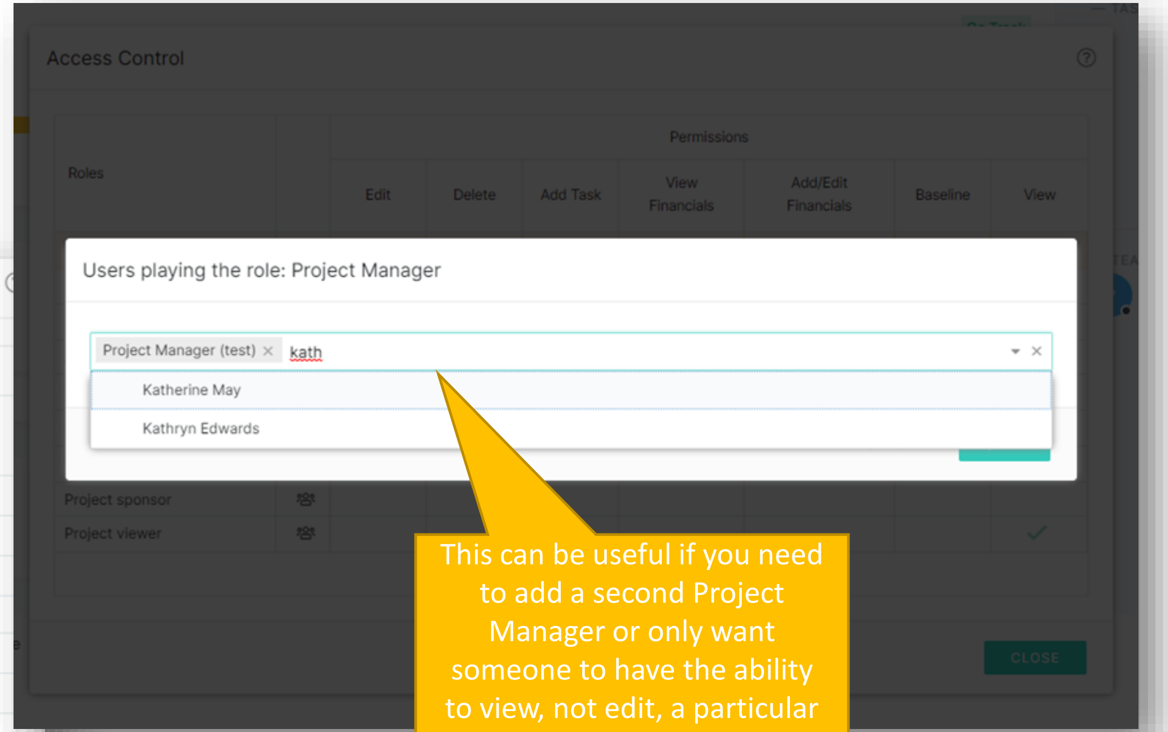
Permissions have been set globally, but you can change them for individual projects



In the project screen, click on the menu and select 'Access Control'



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



This can be useful if you need to add a second Project Manager or only want someone to have the ability to view, not edit, a particular project