Administrative Accounts and Roles

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Administrative Accounts

Administrative accounts are responsible for the creation, configuration, operation, and management of projects and project resources in DecisionDirector. An administrative account is created when a holder of a DecisionDirector account holder is assigned, and accepts, one or more administrative roles.

Scopes of Authority of Administrative Roles

There are three possible scopes (or levels) of authority of administrative roles:

1. **Organization** - role applies to organization and all workspaces and activities created within the organization.

2. **Workspace** - role applies to the workspace and all activities created within that workspace.

3. **Activity** - role applies to the activity only.
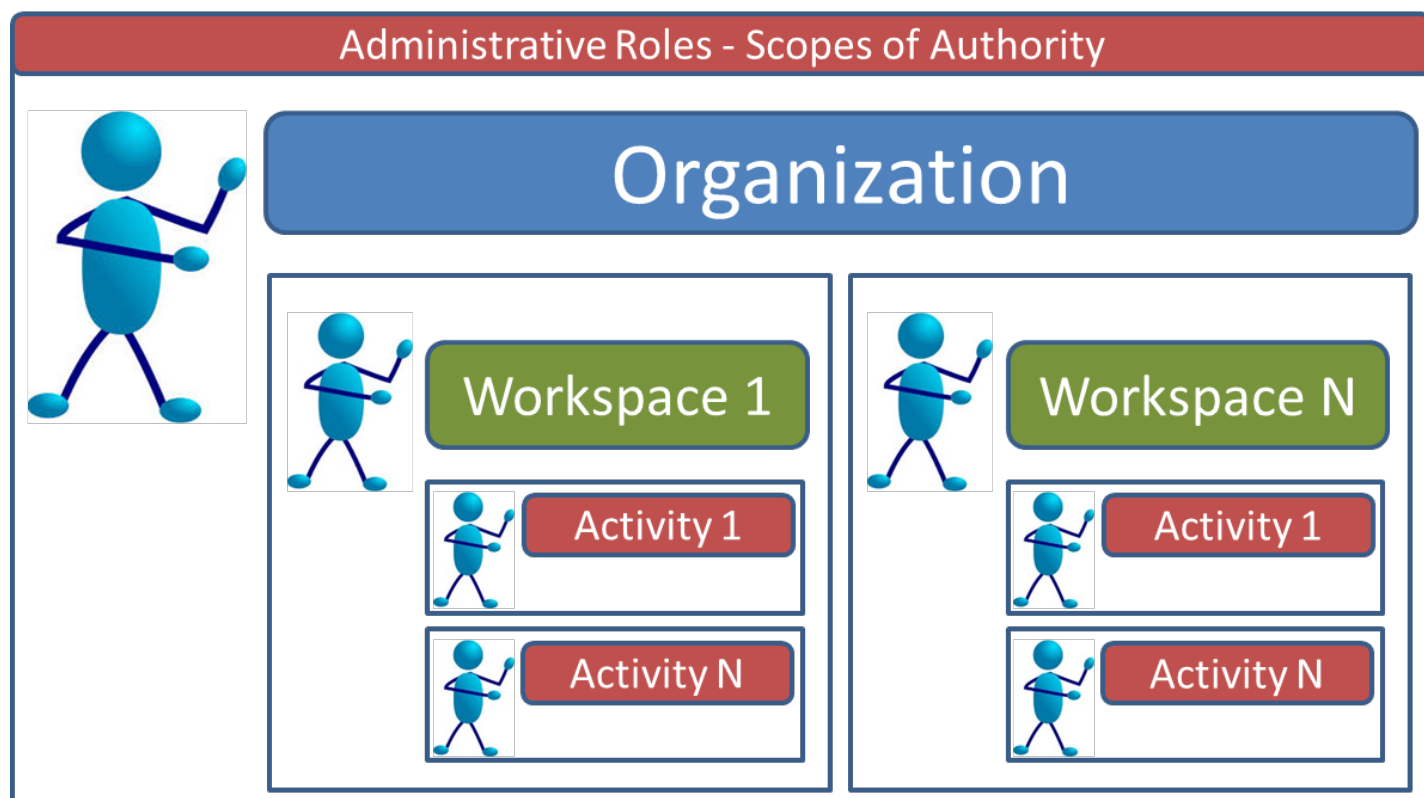
Administrative Roles

Administrative roles are generally divided into three categories:

1. **Administration** - create, configure, and manage workspaces and activities.

2. **Content** - create, configure, and manage libraries and documents.

3. **Engagement Management** - issue and manage invitations to activity contributors and RFP bidders.

The table below lists the available administrative roles and their descriptions:

Role Name	Description
Admin1	Full administrative privileges - create, update, manage entity (e.g. organization, workspace, activity)
Admin2	Most administrative privileges - update and manage entity but cannot create
Content Editor	Can create and manage sections and detail records within a virtual document, but cannot create new virtual documents
Content Integrator	Can import documents
Content Manager	Can create and manage documents and packages
Engagement Guest	Can receive invitations and manage engagements on behalf of invited guests, e.g. bid responders
Engagement Host	Can create, issue, and manage engagements, e.g. RFPs
Facilitator	Can view overall activity summary information. In future, will be have additional facilitation capabilities
ReportViewer	Can access reports and extracts within activity
UserAdmin	Can administer users
Viewer	Read-only access to activity; no updateable fields

Guidelines for Administrative Role Assignments

The following guidelines are useful for those just starting out with DecisionDirector:

1. The **Admin1** role is the most powerful role because it provides the power to create.
2. Every organization must have at least one person with the **Admin1** role for the organization. **Organization level Admin1**'s can create workspaces for project teams that wish to use DecisionDirector.
3. Once a workspace is created, the **Organization Admin1** can serve as the administrator for that project, or they can assign a **Workspace Admin1** role to someone on the project team so that the project team can manage the creation of collaborative Activities.
4. It is not a good idea to assign project people the **Admin1** role at the Organization level. Too many **Organization Admin1**'s can lead to confusion and unnecessary mistakes.
5. The next most essential roles are **Content Manager** and **Content Editor**. These roles can be given in tandem to those who are tasked with creating and editing documents. These roles can be assigned at either at the organization level or at the workspace level
6. An **Organization Content Editor/Manager** can create and maintain documents in the Organization library. This is useful for those organizations that maintain standard documents for

use in their projects (meaning, in their project Workspace libraries).

7. As with the **Admin1** role, it is better to assign **Organization Content Manager/Editor** roles to a small number of people. Project team members who will creating and managing documents should be assigned the Content Manager/Editor roles at the project Workspace level.

8. If a project will entail issuing an RFP, then someone will need to have the **Engagement Host** role at the Workspace level.

Creating and Managing Administrative Accounts

See Creating and Managing Administrative Accounts for information and instructions for administrative account management.