|  |  |  |  |
| --- | --- | --- | --- |
| **Object** | **Admin & Executive** | **Team lead** | **User** |
| Initiative (project. Project) | Admin and Executive have all the rights to access this object. Admin or executive can assign the team lead. | Team lead cannot change team lead, If current logged in id and the team lead id is equal then the logged in id user have all the rights to the particular project except team lead field. Team lead does not have access to finance tap that is only for admin and executive. | User has only view permission. |
| Initiative. Proposal | Admin and Executive have all the rights to access this object. They can add the question others can’t. | If there is question exist, then the answer will enabled, team lead can also see others proposal but cannot edit. | If there is question exist, then the answer will enabled, user can also see others proposal but cannot edit. |

FIELDS ACTIONS

|  |  |
| --- | --- |
| Initiative (project. Project) | When on change the team lead field, Automatically added that selected name in members field, under the team tab, and also the team supports field, again when we on change the team lead field, team support field re-seted and also the members field, without team lead we can choose team support but it does not affects members field, team lead does not comes under the team support field and also team support does not comes under the team lead field. |
| When on change the initiative template filter the stage based on the template, added new activities based on the initiative template |
| Percentage of completion affects when on change the stage field |
| In the team tab itself we can add team members |
| Initiative (project. Task ) | When on change the activity template filter in the stage based on activity template and resource type. |
| Percentage of completion affects when on change the stage field |
| If current user id and the assigned to id is equal then the current user can attach the document |
| Everyone can raise issue, key deliverable, notes |
| Initiative proposal (initiative. proposal) | Everyone can raise proposal, admin can edit the question others can’t. |
| Every new proposer can attach the documents |
| If current user id and the proposer id is equal then proposer can edit the document others can only view the documents. |
|  | When click on the approve status initiative proposal converted to initiatives, that action can be done by the admin and exicutive |

Menu actions:

*Main menu Initiatives:*

|  |  |
| --- | --- |
| Initiatives | Admin and executive can create initiatives others can’t; they can only propose the initiative. |
| Initiative proposal |  |
| Activity template |  |
| Initiative template |  |
| Activities |  |
| TO-DO |  |
| Issues |  |
| Project lead issue |  |

*Main menu Configuration:*

|  |  |
| --- | --- |
| Initiative group |  |
| *Issues:*   |  |  | | --- | --- | | Versions |  | | Issue type |  | | Issue version |  | | Module |  | | Phase |  | | Features |  | | Requirements |  | | Labels |  | | |
| Initiative type |  |
| Initiative category |  |
| Outcome |  |
| Outcome group |  |
| Department |  |
| Department group |  |
| Process |  |
| Process group |  |
| Resource |  |
| Activity template state |  |
| Activity state |  |
| Initiative stages |  |
| Issue kanban state |  |
| Issue stage |  |
| Sprint |  |
| Status |  |
| Proposal status |  |
| Questions |  |
| Reason type |  |