guide

# Setting Up Access Permissions in Cerebro

## 1 Why Access Permissions Matter

Access permissions let you control access to the Universe, projects, and tasks — and define who can see what in the system.

You can:

- hide projects and tasks
- restrict access to data
- separate internal and external teams

## 2 Where to Start

If you haven't set up your Universe yet, we recommend starting with the Admin Guide storyboard.

## 3 How Permissions Work

In Cerebro, access permissions consist of three parts:

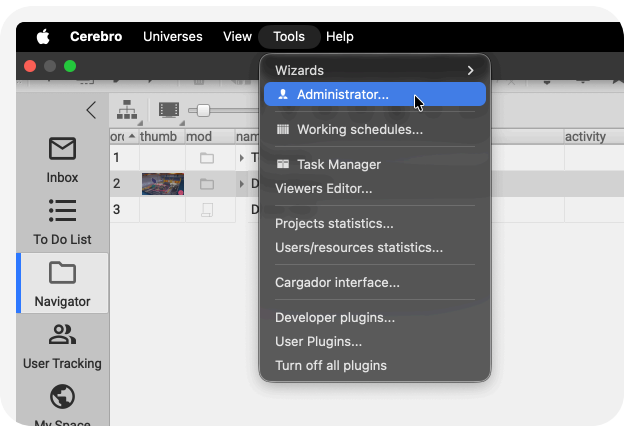
- groups — bring users together
- permissions — define what they can do
- access — defines what users can see

Permissions can be configured at different levels:

- Universe
- project
- task

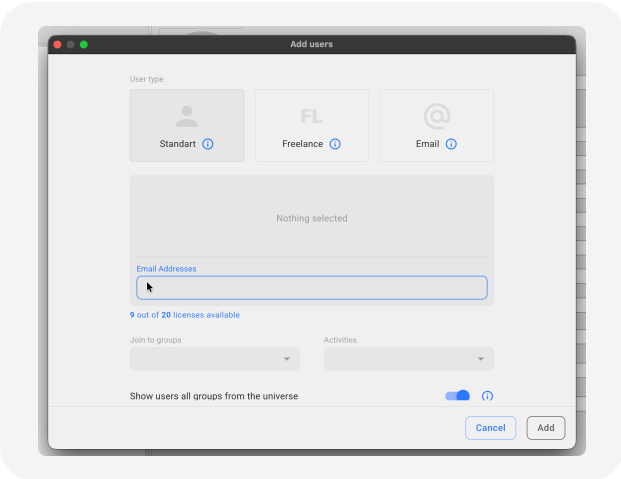
## 4 Adding Users

Start by adding users to the system.




Go to *Tools → Administrator → Users.*

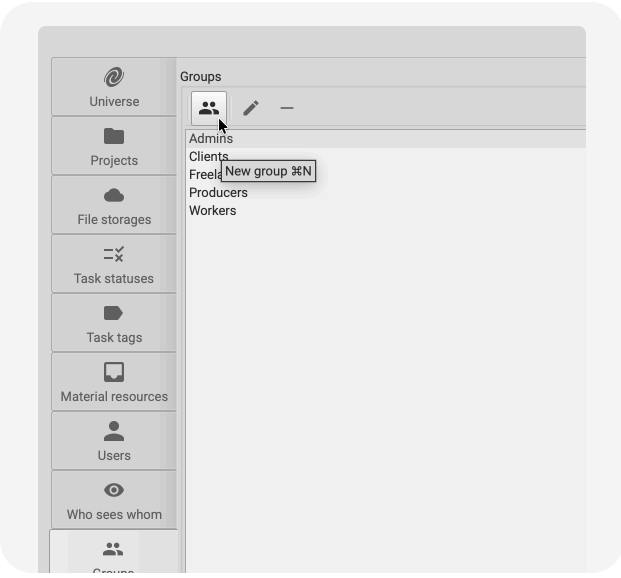
Click New user,




Choose the account type,
and enter an email.

## 5 Creating User Groups

Next, create groups

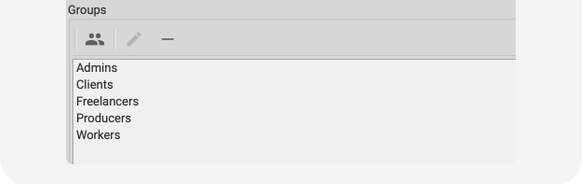



Open the *Groups* section
and click *New group*

Give the group a name

## 6 Structuring Groups

We recommend organizing groups
based on user roles



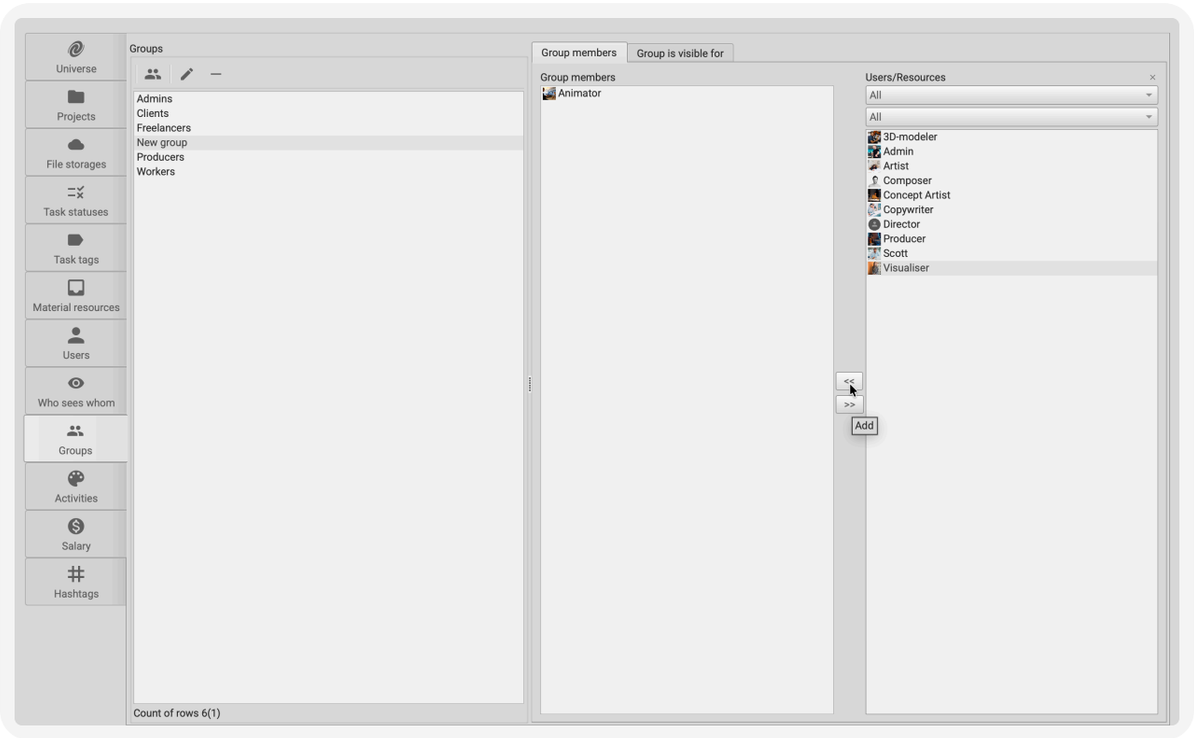

For example:

Administrators | Managers | Artists | Clients | Freelancers

## 7 Adding Users to Groups

To add users to a group, open the *Groups* section and select the group

Add users to the list
You can also add users when creating the group

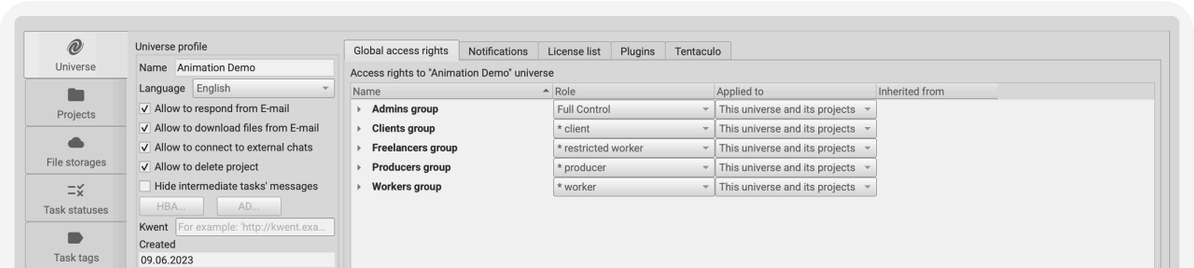


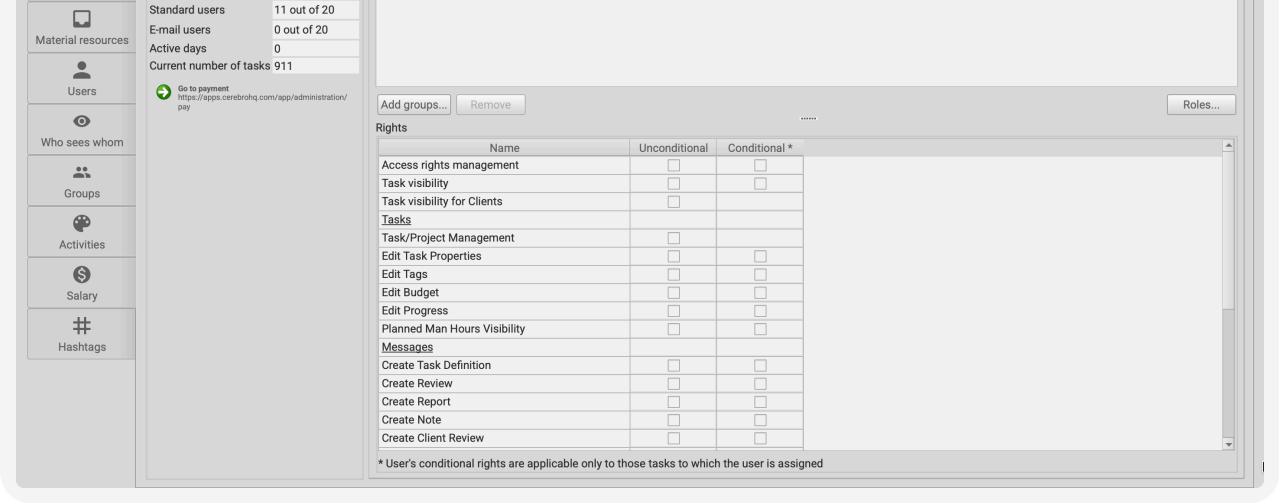

Once added, users automatically inherit the group's permissions.

## 8 Where Permissions Are Set

Now let's configure permissions for the groups

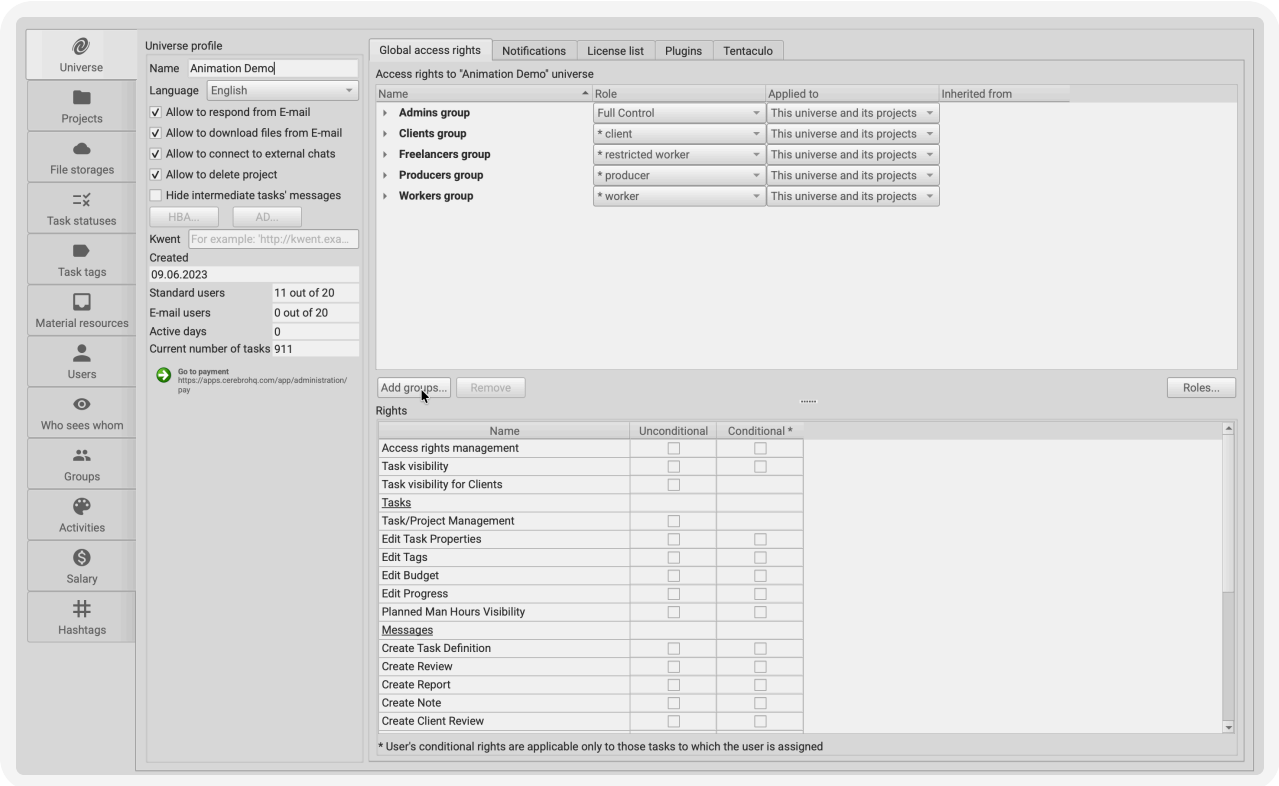
Open the *Administrator* panel and go to the *Universe* tab.



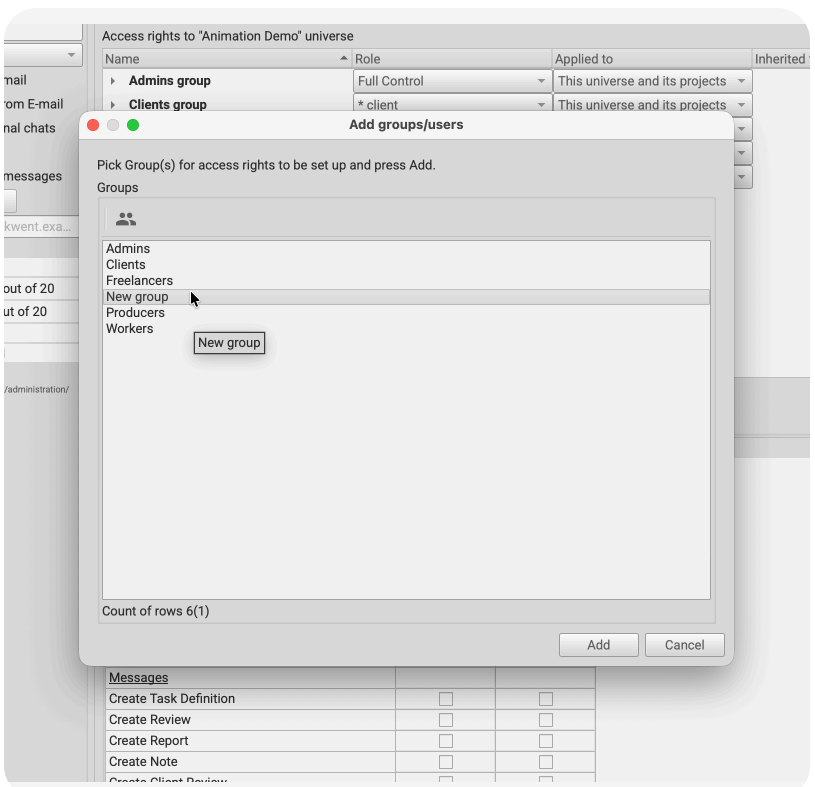


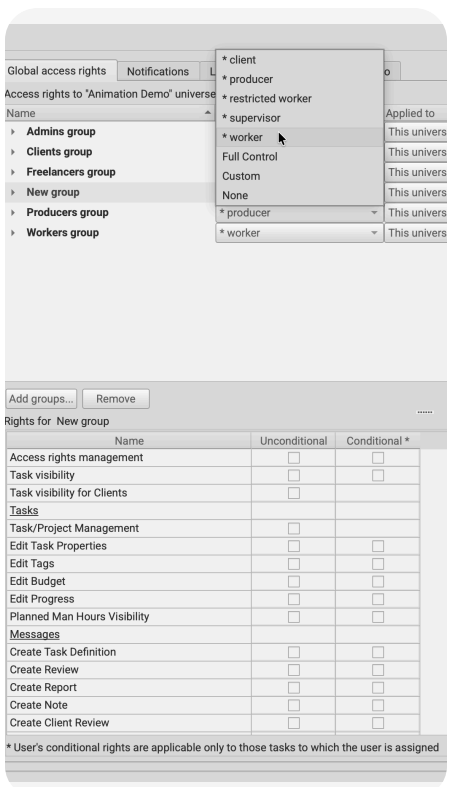

## 9 Setting Permissions

To assign permissions, click *Add groups* and select a role.
You can also create custom roles if needed.



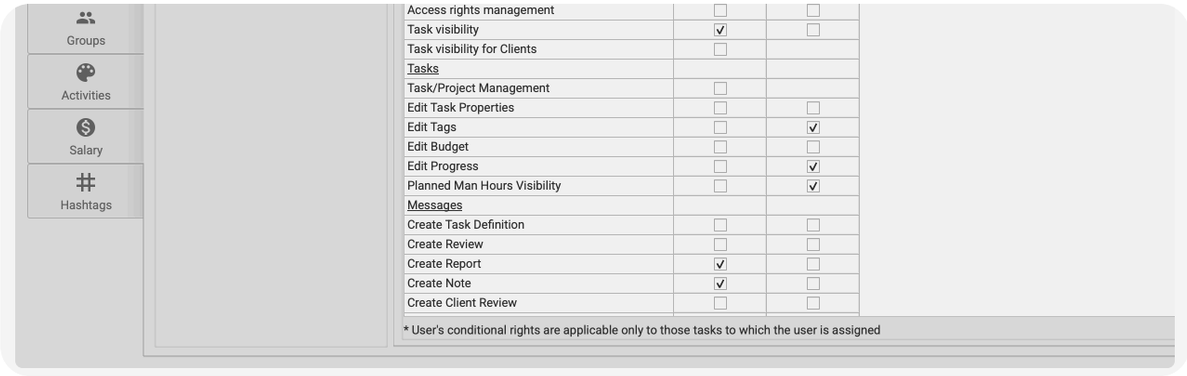

The permissions list shows all available actions for the selected role.
You can enable or disable them manually.



If the permission is checked in the *Unconditional* column, it applies across the entire Universe.

If it's in *Conditional*, it applies only to tasks where users from that group are assigned.



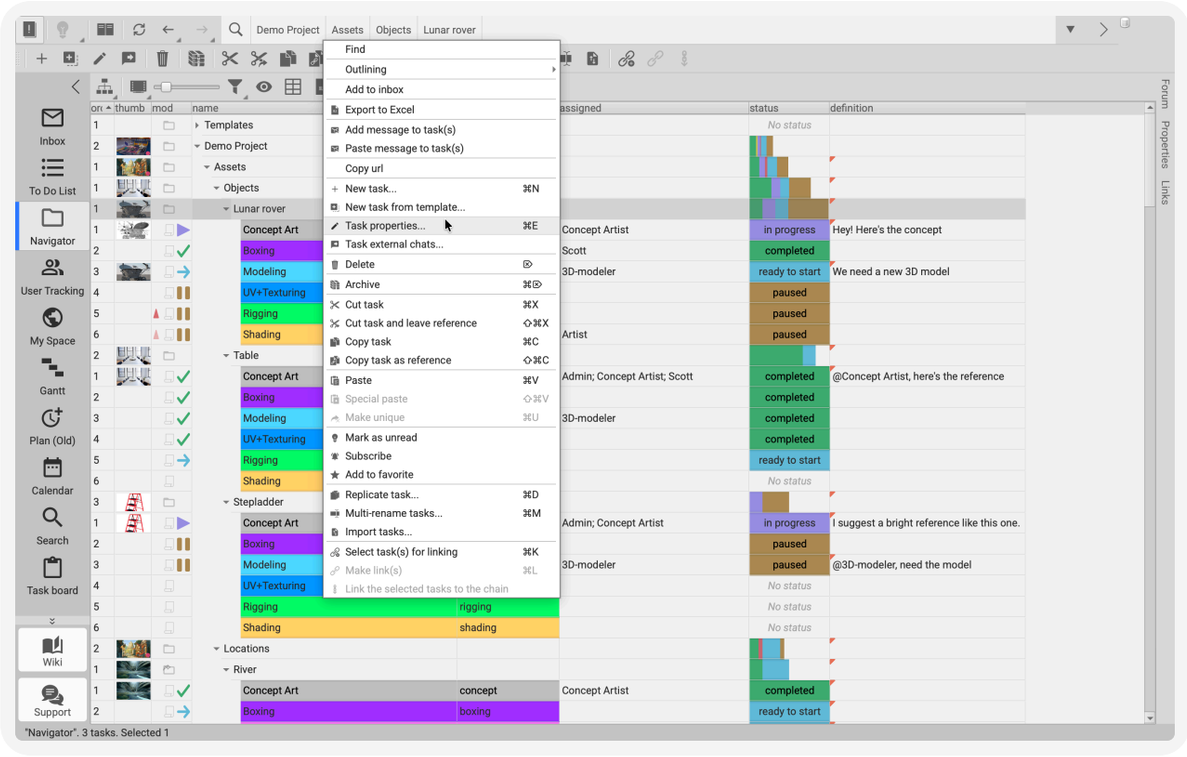

## 10 How Permissions Are Applied

Permissions are applied at the Universe level by default.
If needed, you can override them for specific projects or tasks.

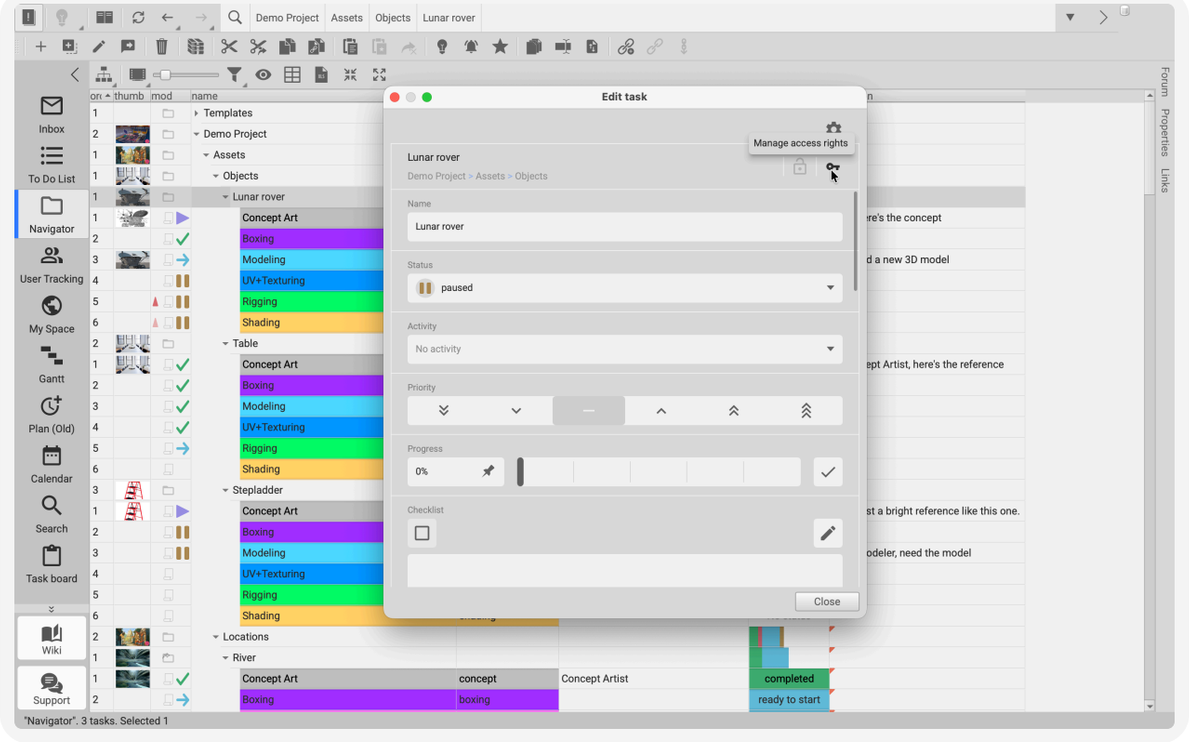
## 11 Task-Level Permissions

Let's look at how to configure permissions at the task level.

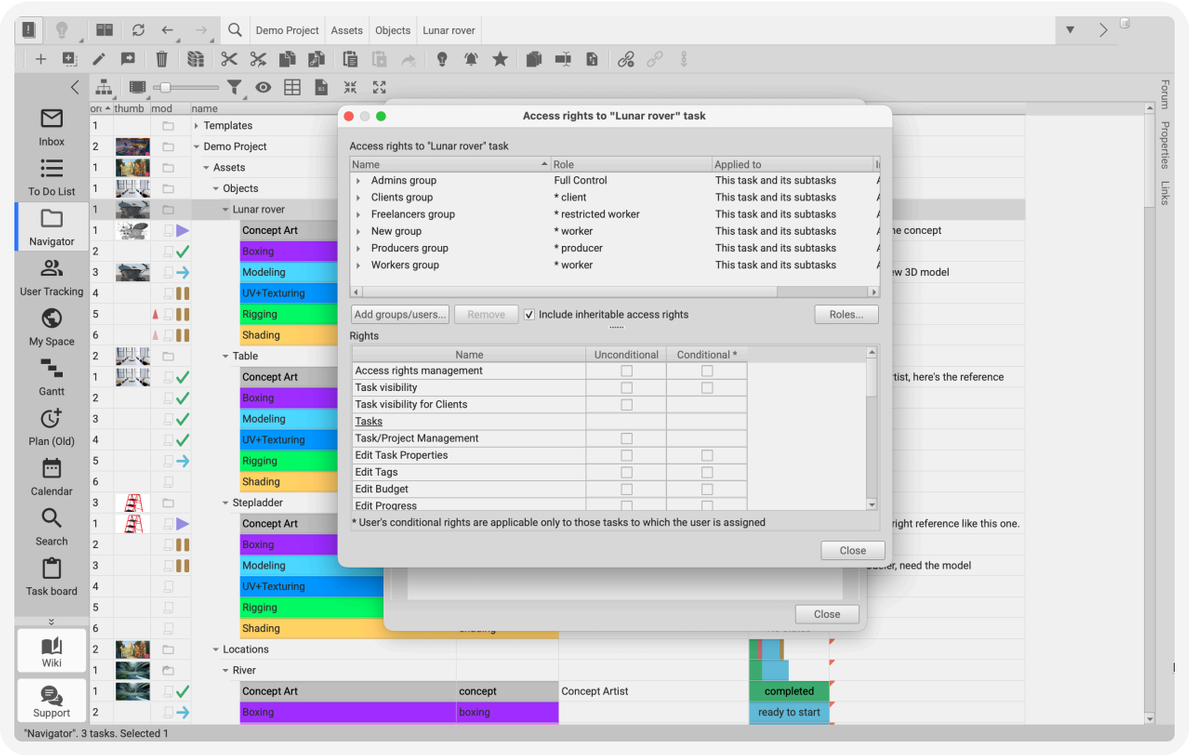
Open a task and go to its *Task properties*.




Click *Manage access rights.*



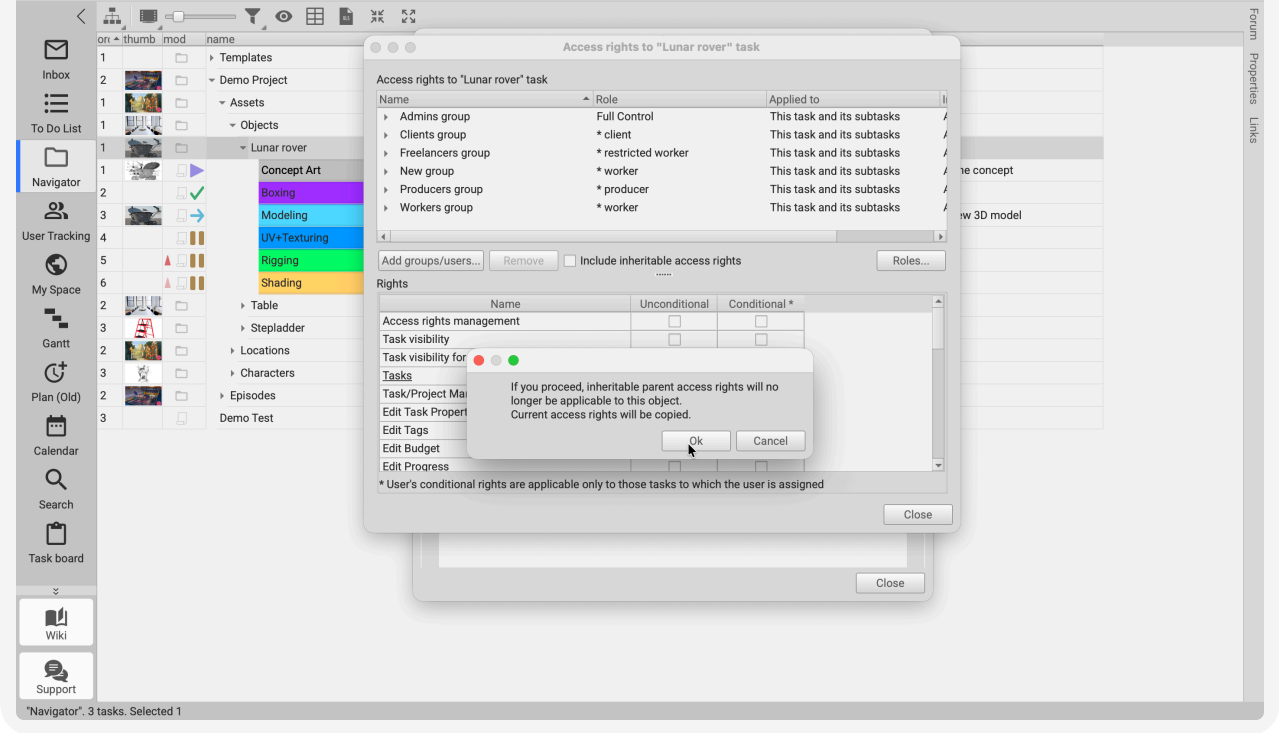

Here you'll see all groups and users
who have access to the task.




## 12 Editing Task Permissions

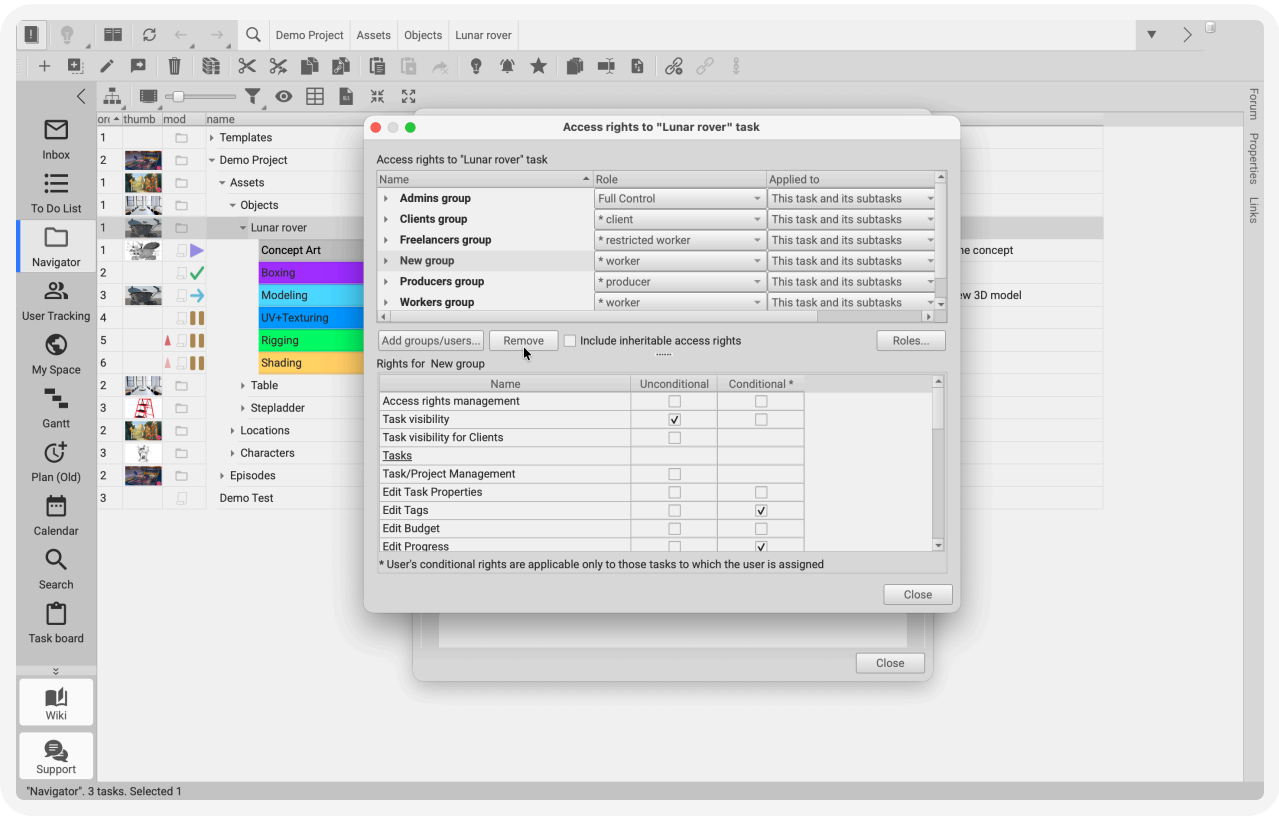
Uncheck *Include inheritable access rights* to set custom rules for the task.

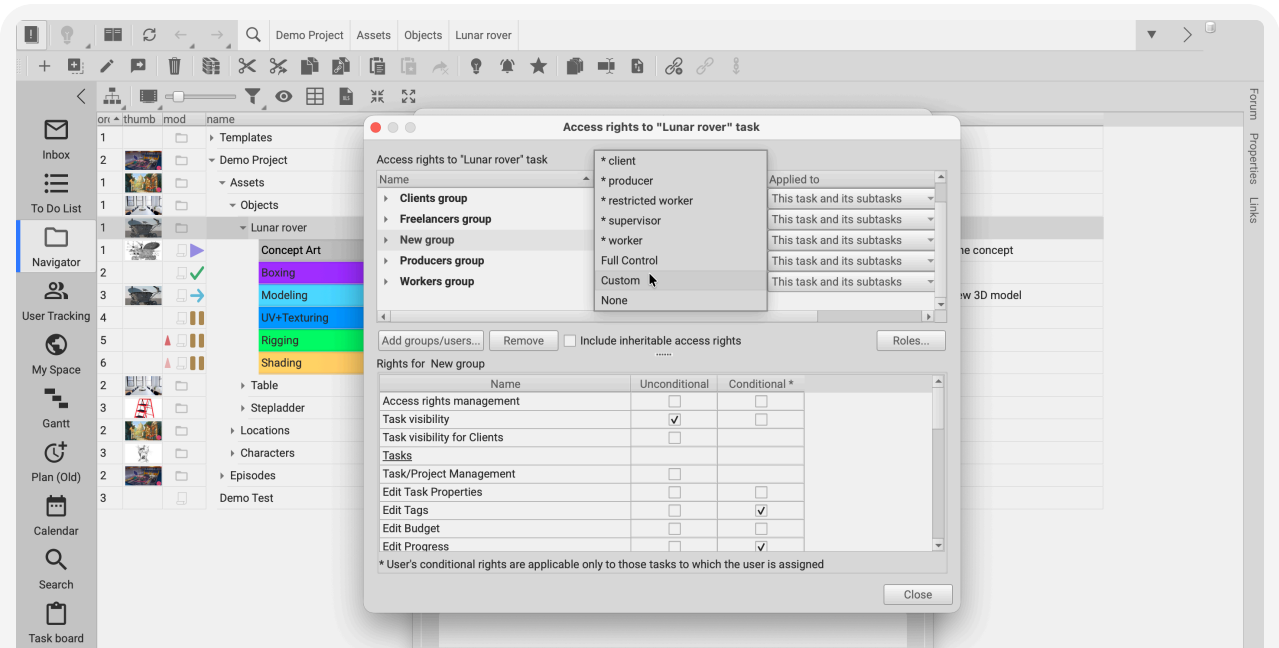
Add or remove groups and users, and configure their access.

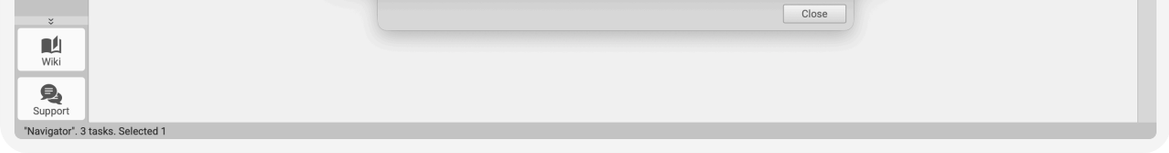



## 13 Restricting Task Access

Task-level permissions override global settings.
They allow you to restrict access within a project.



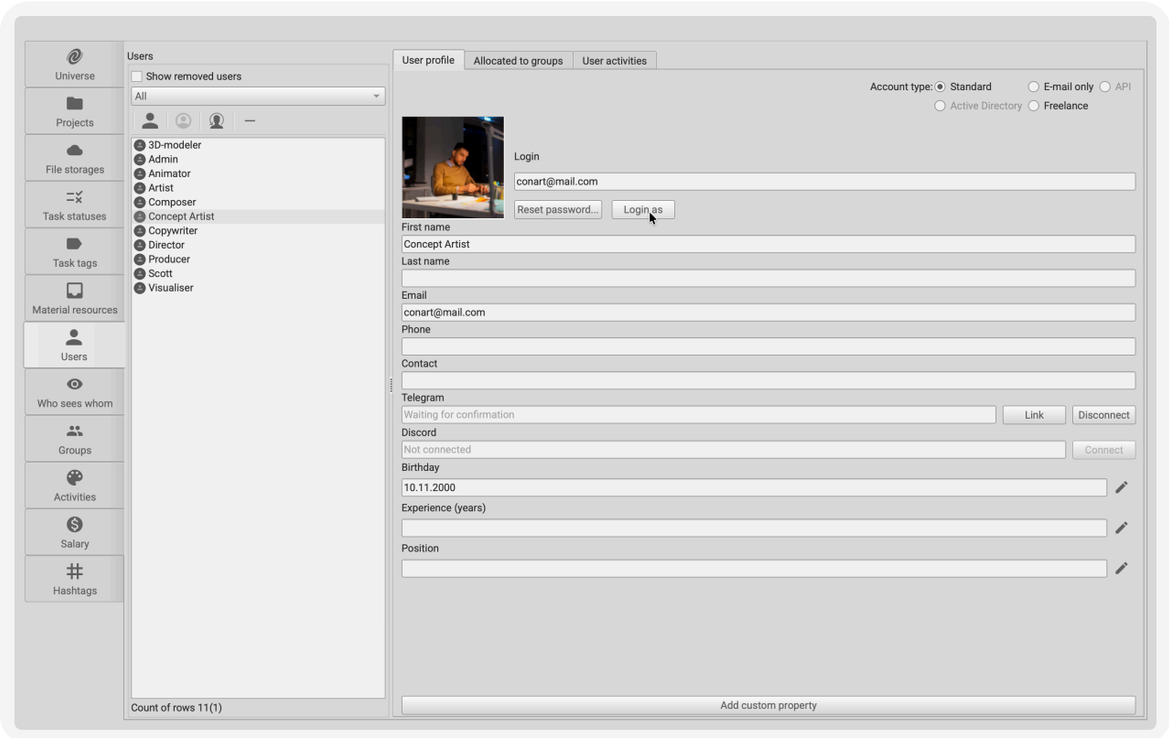



## 14 Checking Access Settings

To verify settings, go to the *Users section*

Select a user
and click *Login* as.

Check what projects
and tasks they can see.



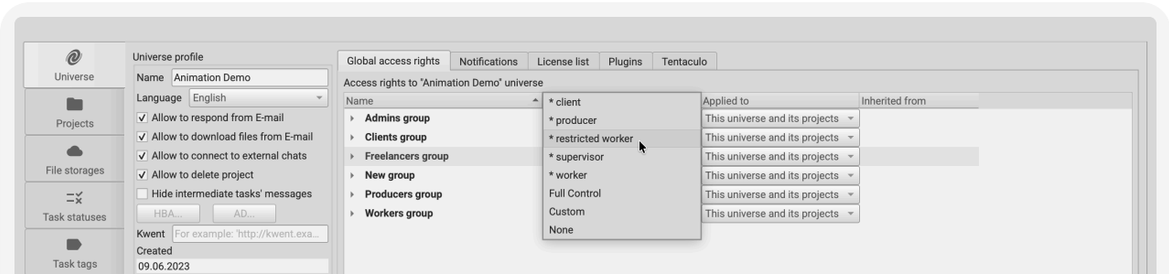

## 15 Use Case — Freelancer Access

Let's take a look at a common use case.

Freelancers only see the tasks
they're assigned to.

## 16 Setting Up Freelancer Access

Create a Freelancers group as shown earlier.
In the *Universe tab*, assign the *Restricted worker* role.



As a result, the user will only see their assigned tasks and won't have access to other project data.

## 17 Use Case — Client Access

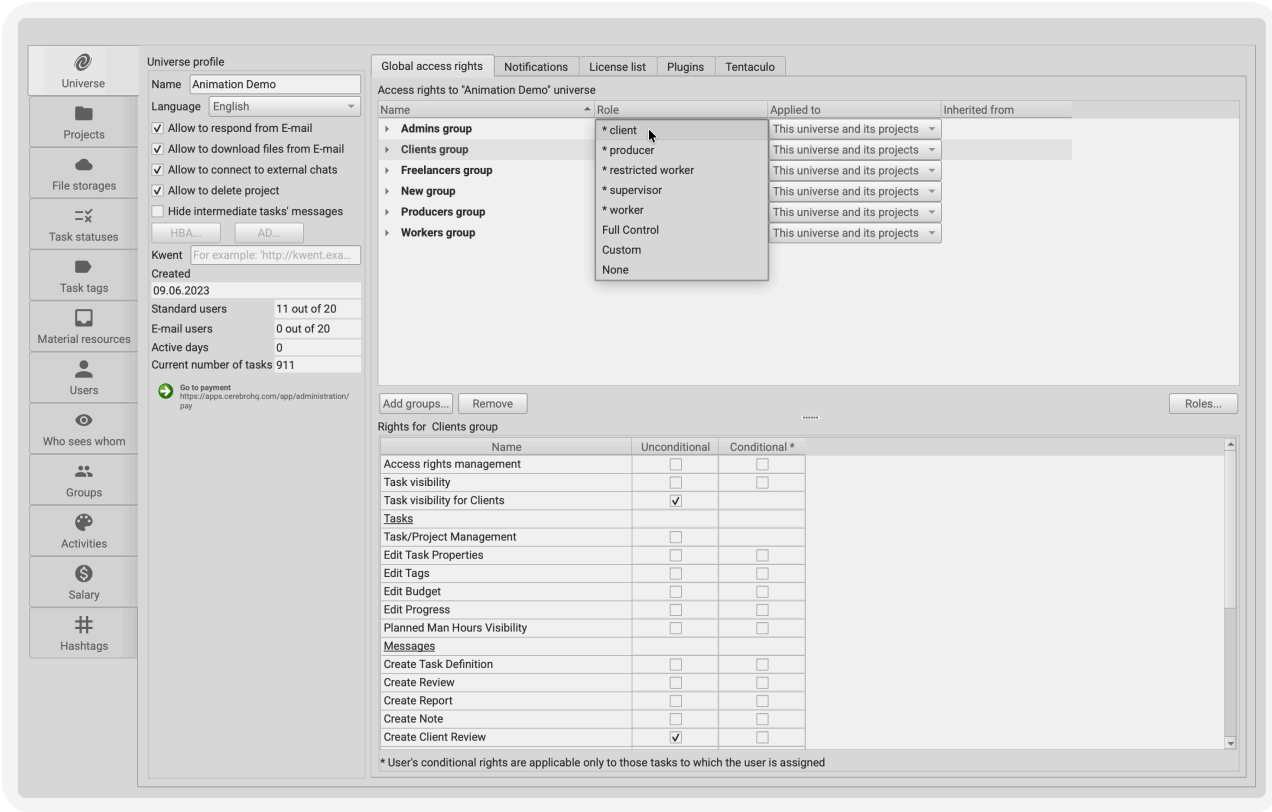
Let's take a look at another common use case.

The Client role allows users to create a specific message type — *Client review* — and limits visibility to messages marked as *Visible to clients*.

## 18 Setting Up Client Access

Create a Clients group and assign the client role in the *Universe* tab.

Clients will only see projects and tasks they have access to, as well as messages marked *Visible to clients*.




## 19 Keeping Permissions Simple

Whenever possible, keep access management simple.

Avoid configuring permissions for individual users unless necessary — use groups instead

This reduces errors and makes the system easier to manage.

The simpler your setup, the easier it is to maintain.

## 20 What Proper Setup Gives You

Well-configured permissions help you:

- protect your data
- simplify project management
- safely collaborate with both internal and external teams