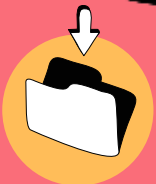# capsa

User Groups & Access

A detailed guide to roles and permissions in Capsa

GUIDE

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Intro

This document provides a clear reference for how user groups work in Capsa and what each role can access within a project.

User groups are designed to reflect real project responsibilities. They help you control access, protect information, and make sure people only see and do what they need to.

This guide is intended to be practical. Use it when setting up a project, inviting new users, or reviewing access as roles change.

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A simple approach to access

When assigning user groups, the guiding principle is simple: **give people the least access they need to do their job well.**

For most projects:

- **Creator** and **Viewer** will be the most commonly used roles
- **Partner** is ideal for limited or occasional access
- **Lead** and **Controller** should be reserved for users actively managing the project

User groups can be changed at any time, and access updates immediately.

Clients, partners and external users

Client access should be considered carefully.

In most cases, clients are best added as **Partners**, giving them controlled access to current information without exposing project history, reporting or wider usage data.

Some clients may need broader visibility, such as access to document versions or ongoing project context. In these cases, **Viewer** access may be more appropriate.

As a rule:

- **Partner** suits limited, current-state access
- **Viewer** suits ongoing visibility

External consultants, specialists and occasional users are often best added as **Partners**, allowing access to be tightly controlled.

Higher-level roles

Roles such as **Lead** and **Controller** provide additional visibility into project reporting, user activity and delivery performance.

These roles should only be assigned to users who are actively responsible for managing the project, coordinating teams or overseeing delivery. They are not required for most contributors or stakeholders.

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Role overview

The following section summarises each user group and when it should be used.

Owner

Summary	The Owner is responsible for the project subscription and overall project administration.
Access overview	Full access to all project areas, including user management, project settings and billing.
Best for	The person or business accountable for the project and its subscription.
Typical use	There is only one Owner per project. This role is usually held by the person who set the project up or manages the subscription. Ownership can be transferred to another user at any point during the project.

Controller

Summary	The Controller is the main administrative role for the project, responsible for managing how the project is set up and run day to day.
Access overview	Access to nearly all areas of the project, including users, documents and settings. Controllers cannot access billing, change the project subscription or transfer ownership, but can manage almost everything else.
Best for	Key team members responsible for project administration, compliance and good practice. This role is often held by someone different to the Owner.
Typical use	Commonly used for project managers, organisation admin teams or operations leads overseeing delivery of the project.

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Lead

Summary	The Lead role is for users who need to view, create and edit documents, report on project data, and manage users within a specific project.
Access overview	Can access and manage project documents, view project reporting, and create or manage users on the project. Leads do not have higher-level controls or access to project settings.
Best for	Senior team members responsible for leading project delivery and coordinating the wider team.
Typical use	Commonly the project manager or lead consultant. This role suits those who need to monitor project performance and progress without controlling project settings.

Creator

Summary	The Creator role is focused on managing project content, not project settings.
Access overview	Can create, upload, edit and manage documents and key project items. Creators do not have access to project reporting, user management or project settings.
Best for	One of the most common roles, alongside Viewer. Ideal for anyone who needs to actively create and upload project content.
Typical use	Architects, engineers, consultants or suppliers contributing drawings, reports or other project information.

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Viewer

Summary	The Viewer role is for users who need ongoing access to project information, but do not need to add, edit or manage anything.
Access overview	Read-only access to project content that has been shared with them.
Best for	For most users, this should be the default option. Designed for people who need visibility without responsibility for managing project information.
Typical use	Commonly used for clients, stakeholders and team members who need to stay informed throughout the project. If a client only needs limited access to current information, the Partner role may be more appropriate.

Partner

Summary	The Partner role is for users who need limited, controlled access to current project information only.
Access overview	Restricted, view-only access to current information. Partners have limited feature access and cannot see project history, reporting or usage data.
Best for	External parties or clients who need tightly controlled access.
Typical use	Used for clients, consultants or third parties who only need access to specific, up-to-date information. For clients who require broader, ongoing visibility, the Viewer role is usually a better fit.

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Keeping access up to date

Project roles are not fixed. As responsibilities change, access can be updated to match.

Reviewing user access regularly helps keep projects organised, secure and easy to manage.

Detailed access by role

The table on the following pages shows a full breakdown of what each user group can see and do across the project.

Use this as a reference when:

- Inviting new users
- Reviewing existing access
- Supporting questions around permissions and visibility

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Item	Page / Feature / Action	Owner	Controller	Lead	Creator	Viewer	Partner
Capsa Pages							
1	User Dashboard	Yes	Yes	Yes	Yes	Yes	Yes
2	Project Dashboard	Yes	Yes	Yes	Yes	Yes	No
3	Project Documents	Yes	Yes	Yes	Yes	Yes	Yes
4	Project Reporting	Yes	Yes	Yes	Limited	No	No
5	Project Users	Yes	Yes	Limited	No	No	No
6	Project Settings	Yes	Yes	No	No	No	No
7	User Personal Settings	Yes	Yes	Yes	Yes	Yes	Yes
1	**User Dashboard Page - Features and Content**						
1.1	Can view projects they created or are active users?	Yes	Yes	Yes	Yes	Yes	Yes
1.2	Favourite project button and hide/reveal projects.	Yes	Yes	Yes	Yes	Yes	Yes
1.3	Project search.	Yes	Yes	Yes	Yes	Yes	Yes
1.4	Create new project.	Yes	Yes	Yes	Yes	Yes	Yes
2	**Project Dashboard Page - Features and Content**						
2.1	Can view project details.	Yes	Yes	Yes	Yes	Yes	No
2.2	Can view project stats and achievements.	Yes	Yes	Yes	Yes	Yes	No
3	**Project Documents Page - Features and Content**						
3.1	Can see all current documents in project?	Yes	Yes	Yes	Yes	Yes	Yes
3.2	Can see all previous documents in project?	Yes	Yes	Yes	Yes	Yes	No
3.3	Header features:						
	Notifications icon and dropdown.	Yes	Yes	Yes	Yes	Yes	Yes
	Access user settings.	Yes	Yes	Yes	Yes	Yes	Yes
	Can access project search and dropdown list?	Yes	Yes	Yes	Yes	Yes	Yes

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Item	Page / Feature / Action	Owner	Controller	Lead	Creator	Viewer	Partner
3.4	Subheader features:						
	Can see all project page icons?	Yes	Yes	No	No	No	No
	Can search and filter documents in search box?	Yes	Yes	Yes	Yes	Yes	Yes
3.5	Headings box features:						
	Document read status icon/filter.	Yes	Yes	Yes	Yes	Yes	Yes
	Document favourite status icon/ filter.	Yes	Yes	Yes	Yes	Yes	Yes
	A-Z and Z-A heading sort.	Yes	Yes	Yes	Yes	Yes	Yes
	Multiple selection box.	Yes	Yes	Yes	Yes	Yes	Yes
3.6	Document viewer:						
	Can preview documents	Yes	Yes	Yes	Yes	Yes	Yes
	View document.	Yes	Yes	Yes	Yes	Yes	Yes
	Print document.	Yes	Yes	Yes	Yes	Yes	Yes
	Fullscreen document view.	Yes	Yes	Yes	Yes	Yes	Yes
	Download document.	Yes	Yes	Yes	Yes	Yes	Yes
	Can toggle between documents.	Yes	Yes	Yes	Yes	Yes	Yes
3.7	Header plus options:						
	Add document.	Yes	Yes	Yes	Yes	No	No
	Add user.	Yes	Yes	Yes	No	No	No
	Add, edit or remove Tags.	Yes	Yes	Yes	Yes	Yes	No
3.8	Document plus options:						
	Edit.	Yes	Yes	Yes	Yes	No	No
	Edit - can change the time/issue date of a document?	Yes	Yes	No	No	No	No
	Tag - view and create.	Yes	Yes	Yes	Yes	Yes	No
	Tag - delete.	Yes	Yes	Yes	No	No	No
	Add revision.	Yes	Yes	Yes	Yes	No	No
	Transfer.	Yes	Yes	Yes	Yes	Yes	Yes
	Notify.	Yes	Yes	Yes	Yes	Yes	No
	Admin request.	Yes	Yes	Yes	Yes	Yes	Yes
	Download	Yes	Yes	Yes	Yes	Yes	Yes

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Item	Page / Feature / Action	Owner	Controller	Lead	Creator	Viewer	Partner
3.9	Document multiple selection options:						
	Download	Yes	Yes	Yes	Yes	Yes	Yes
	Print	Yes	Yes	Yes	Yes	Yes	Yes
	Transfer	Yes	Yes	Yes	Yes	Yes	Yes
	Notify	Yes	Yes	Yes	Yes	Yes	No
	Tag	Yes	Yes	Yes	Yes	Yes	No
4	**Report Page - Features and Content**						
4.1	Type - Journals:						
	Access Journal.	Yes	Yes	Yes	Yes	No	No
4.2	Type - Registers:						
	Current register.	Yes	Yes	Yes	Yes	No	No
	Custom register.	Yes	Yes	Yes	Yes	No	No
	Full register.	Yes	Yes	Yes	Yes	No	No
5	**Users Page - Features and Content**						
5.1	Create new user:						
	Invite new user to project?	Yes	Yes	Yes	No	No	No
5.2	Access groups/permissions for new users:						
	All	Yes	No	No	No	No	No
	Owner	Yes	No	No	No	No	No
	Controller	Yes	Yes	No	No	No	No
	Lead	Yes	Yes	No	No	No	No
	Creator	Yes	Yes	Yes	No	No	No
	Viewer	Yes	Yes	Yes	No	No	No
	Partner	Yes	Yes	Yes	No	No	No

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Item	Page / Feature / Action	Owner	Controller	Lead	Creator	Viewer	Partner
5.3	User options:						
	View.	Yes	Yes	Yes	No	No	No
	Edit.	Yes	Yes	No	No	No	No
	Suspend / Restore.	Yes	Yes	Yes	No	No	No
	Remove.	Yes	Yes	No	No	No	No
	Change access group.	Yes	Yes	Yes	No	No	No
	Resend invite.	Yes	Yes	Yes	No	No	No
	Access history.	Yes	Yes	Yes	No	No	No
5.4	Can change project owner and bill payer?	Yes	Yes	No	No	No	No
6	**Project Settings Page - Features and Content**						
6.1	Can edit project details.	Yes	No	No	No	No	No
6.2	Can view and edit subscription and billing details?	Yes	No	No	No	No	No
6.3	Can change project plan?	Yes	No	No	No	No	No
6.4	Can delete project/cancel plan?	Yes	No	No	No	No	No
6.5	Can access invoices.	Yes	No	No	No	No	No
7	**User Personal Settings Page - Features and Content**						
7.1	View and edit personal details.	Yes	Yes	Yes	Yes	Yes	Yes
7.2	Can link to an organisation?	Yes	Yes	Yes	Yes	Yes	Yes
7.3	Can reset password?	Yes	Yes	Yes	Yes	Yes	Yes
7.4	Can view sign in activity?	Yes	Yes	Yes	Yes	Yes	Yes

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Looking for more?

This guide covers user groups and access in detail. For broader guidance, tools and updates, head to capsaapp.com and explore the Capsa help and resources.

capsaapp.com