

4. How to Assign an Employee to the Project and Desk

In Wifox Business Core Solution, employees with restrictive roles (e.g. “View Own”) must be explicitly granted access to each Project and, optionally, to specific Desks. Follow these steps to assign an employee to their workspace:

Note: If you have assigned a role that allows an employee to view all projects in the system, you **do not need** to assign a specific project and/or desk to that employee. In other cases (roles with viewing only their own projects and desks), it is mandatory to assign a project to an employee.

1. Open the Employee’s Detail View

After creating or locating the employee in the **Employees** list, click the ⇌ **Edit** icon to open their profile form.

2. Launch the “Add Project” Panel

Within the employee’s form, find the **Projects** panel on the right side. Click **+ Add project** to slide out the assignment panel.

3. Select a Project

In the **Project** dropdown, choose the one Project this user should access.

Note: Please assign the project to a designated employee, as this action will give them the necessary permissions to monitor and control various aspects of the project objects.

4. (Optional) Restrict to a Desk

If you want the employee to see only a subset of that Project’s workflows, use the **Desks** dropdown to pick one or more Desks.

Example: A “Support Agent” role might be restricted to the “Support” desk, while a “Sales Rep” could be limited to “Sales Leads.”

Note: Select project desks to restrict user rights to a specific workspace. This function is effective if the user role is set to “View Own”.

5. Save the Assignment

Click **Save** at the bottom of the panel. The new Project (and any selected Desks) appear immediately in the employee’s **Projects** panel.

“ Important:

Employees with broad roles (e.g. “Admin” or “Viewer All”) do not require explicit assignments—those roles inherently grant access to every Project and Desk in the system.

If you leave **Desks** blank, the user will have visibility into all Desks within the assigned Project.

To remove access later, reopen the “Add project” pane, clear the selection, and save.

By carefully assigning Projects and Desks, you ensure that each employee sees exactly the workspaces they need—and no more—helping maintain clear boundaries and data security across your organization.

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