

Investment instance rights for todo's vs. Need-To-Know-Principle

Starting situation:

Currently, todo's for resources are only displayed in the personal todo list if the resource also has instance rights to the respective investment.

Todo's are used by us as subtasks for preparatory work/provision of certain information for project tasks, without the todo resource also having direct project access.

For this purpose, basic users should be able to do preliminary work with to-do's without having to own restricted user licenses (among other things for cost reasons), but they must also be able to see them in their personal to-do list.

From our point of view, an unsatisfactory contribution was described as follows:

<https://knowledge.broadcom.com/external/article?articleId=267026>

Problem:

We have numerous development projects in the automotive industry. For this purpose, it must be ensured that only those who have been staggered for the respective project are allowed to see all project information, need-to-know principle.

Not every resource that has been assigned a todo for a task is allowed to see all project information, which is why they are not allowed to receive instance rights.

Currently, it is also possible to assign a todo to all resources, even if they have not been staggered for the project and thus have instance rights (compared to the tasks, here only staggered project members can be assigned to a task).

Solution:

Make the setting in the system again in such a way that no instance rights are required for assigned todo's, in order todo's (also from checklists) are visible in the personal todo list and "My Workspace" and can also be edited there (done flag, write notes via detail flyout, use conversations in todo for queries and insert Sharepoint link for document storage) and note information for the "assigned resource".