# Project roles

**Roles** option enables the following functionality:

- To control which group or user is assigned to perform a specific step in the workflow;
- To control who can navigate the project's menu items;
- To set Apptimized email notifications (i.e., which users will receive the email notifications).

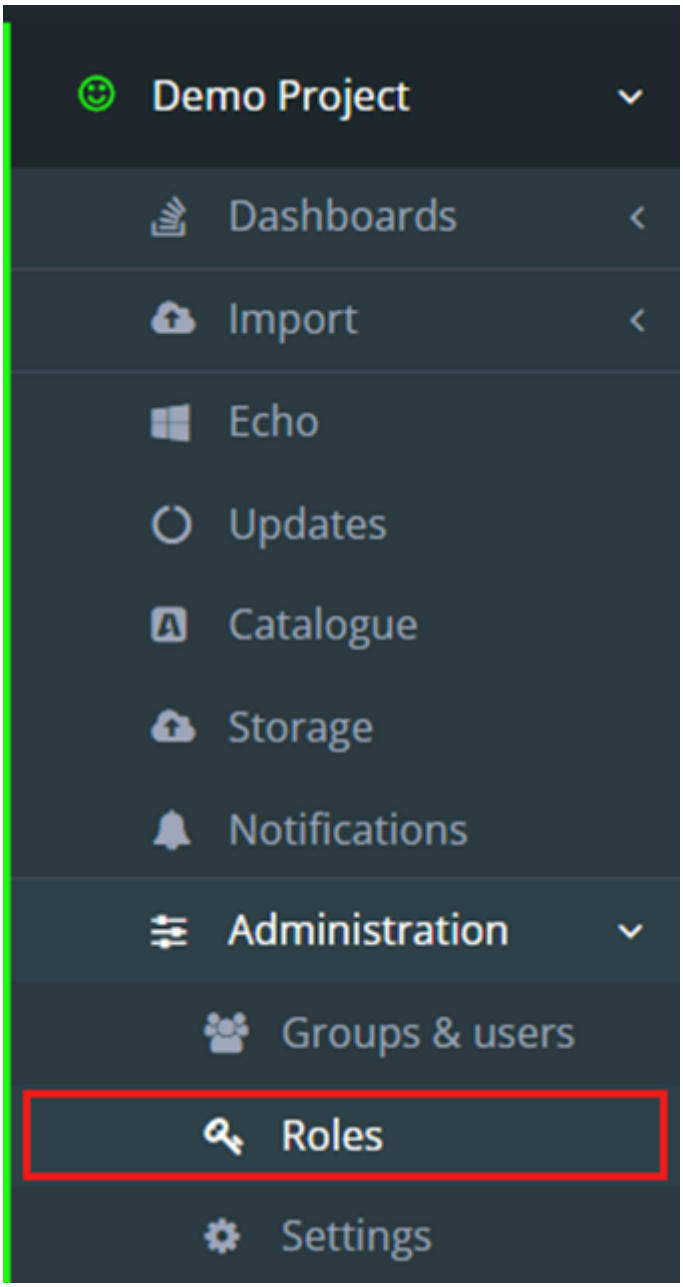
Once the workflow reaches a specific step, the assignment rules will ensure that the task is assigned to the correct group of users (or a user). This will prevent from performing actions by unauthorized users.

> The project administrator role appears as an initial default role after the project was created. Project administrators can perform any workflow action.

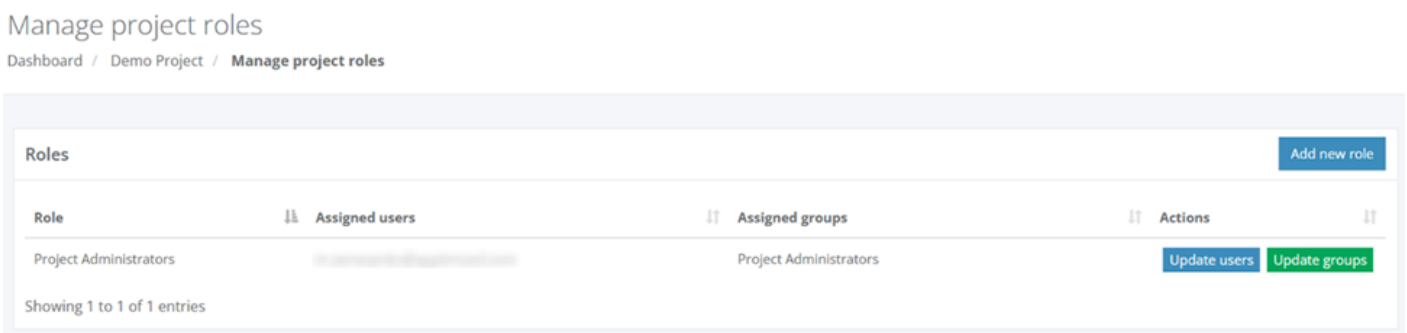
> To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

## Create a role

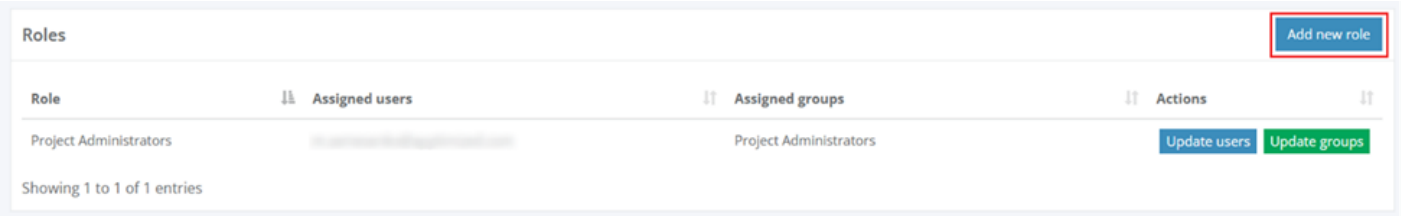
The option to create a role with needed permissions is available under **Roles** in project settings ( **Project** menu > **Administration** > **Roles**).



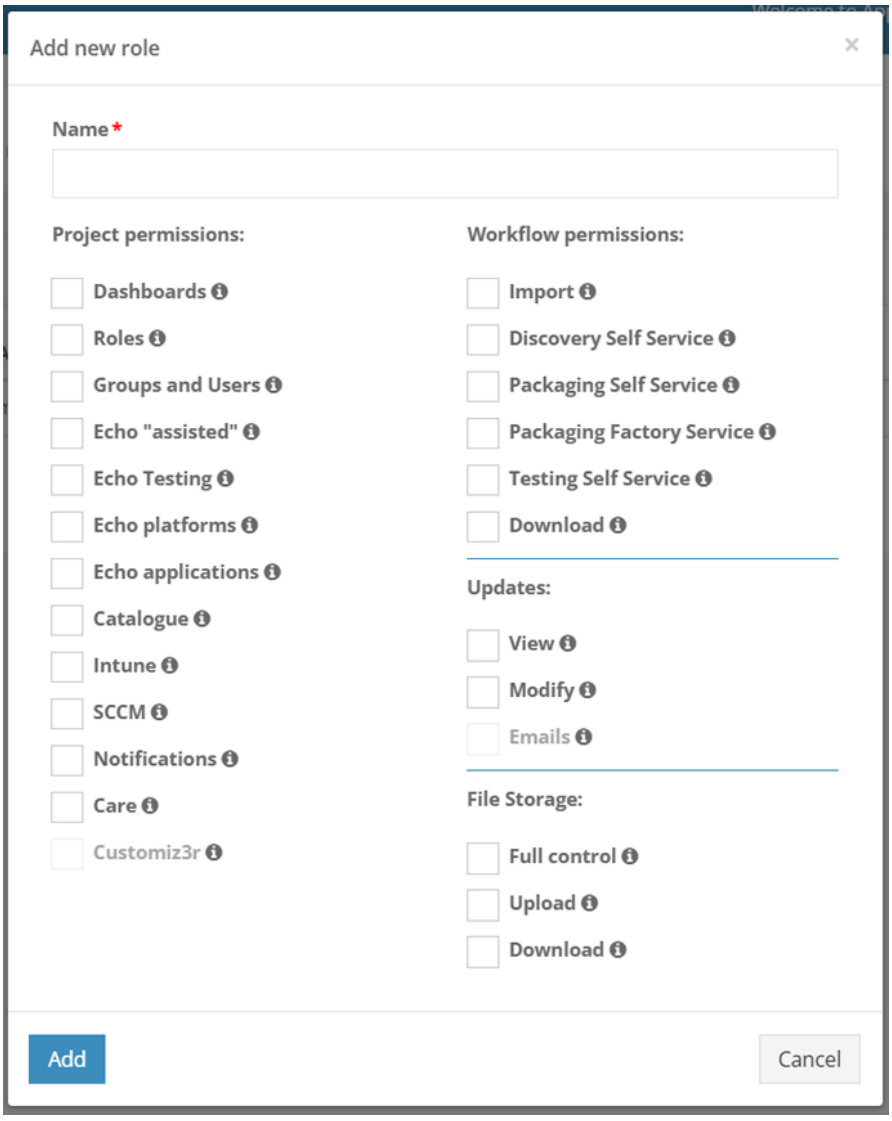

Apptimized opens the following screen:



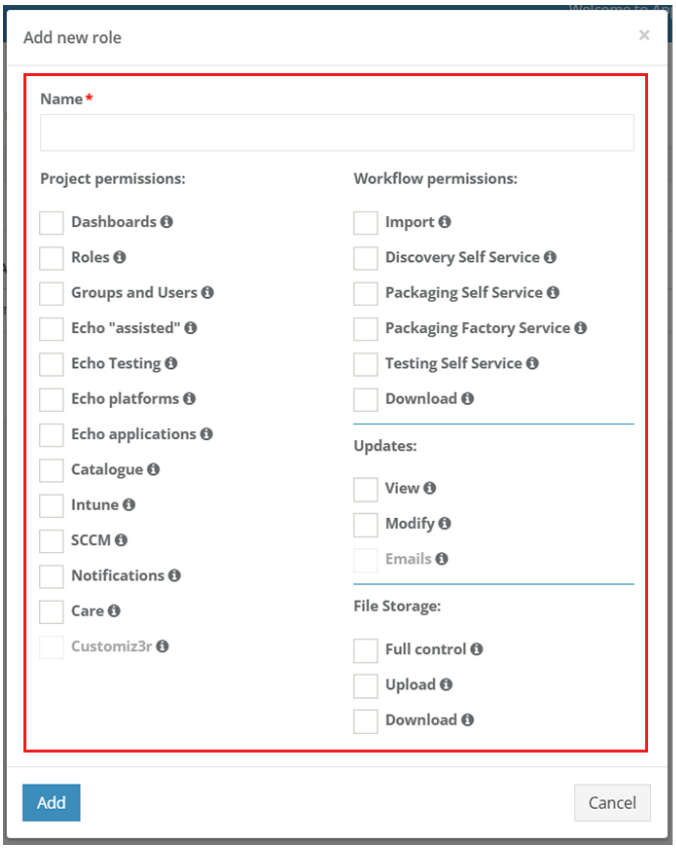

The option to create a new role is available under the **Add new role** button:




Apptimized shows the following modal window when successful:




The new role requires its name, project, workflow and updates permissions. All required fields are marked with an asterisk *.



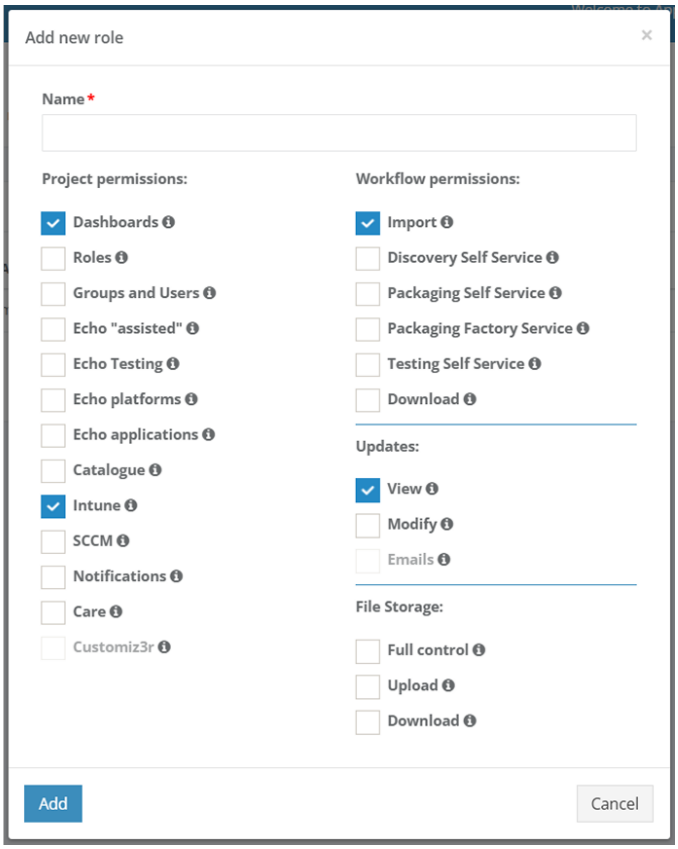



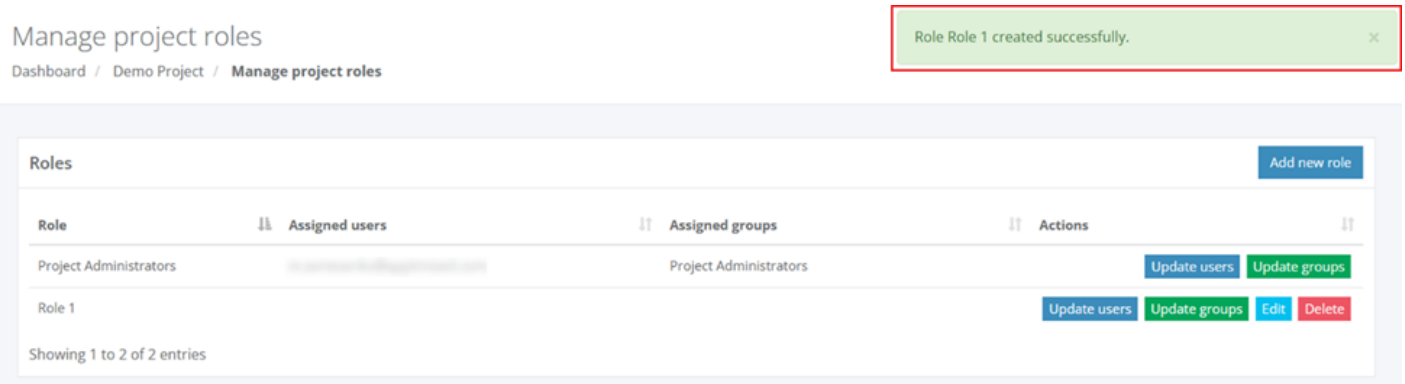

Table 1. Role attributes

| **Attribute** | **Description** |
|---|---|
| **Project permissions** | |
| Dashboards | This attribute provides access to the project dashboard. |
| Access to all apps | This attribute provideees access to all apps if the **Application owner** field is enabled. |
| Roles | This attribute provides access to perform role management activities for the project. |
| Groups and users | This attribute provides access to perform management activities with groups and users for the project. |
| File Storage | This attribute provides access to a dedicated/separate file storage to which the user can upload files for later use. |
| Echo “assisted” | This attribute provides access to assisted Echo playback for interactive sessions such as Discovery and Testing. |
| Echo Testing | This attribute provides test automation capabilities: record the user’s test case and play it back automatically when needed. |

| | |
|---|---|
| Echo platforms | This attribute provides the ability to add and remove Echo platforms in project on Echo statistics page. |
| Echo applications | This attribute provides abilities to check applications for new Echo platform and approve new Echo platform in Project on Echo statistics page. |
| Catalogue | This attribute provides access to latest version of the application which was packaged with a standard guide and ready for use. |
| SCCM | This attribute provides access to perform SCCM activities within the project.<br>The option becomes active when SCCM is enabled for the project. |
| Intune | This attribute provides access to perform Intune activities within the project.<br>The option becomes active when Intune is enabled for the project. |
| Notifications | This attribute provides access to project notification settings. |
| Care | This attribute provides access to Apptimized Care functionality within the project. |
| Customiz3r | This attribute allows access to receive custom packages from the Care service.<br>The option becomes available when Care is selected for the role. |
| **Workflow permissions** | |
| Import | This attribute provides access to perform activities on the **Import** step of the project's workflow. |
| Discovery Self Service | This attribute provides access to perform activities on the **Discovery - Self Service** step of the project's workflow. |
| Discovery Factory Service | This attribute provides access to perform activities on the **Discovery - Factory Service** step of the project's workflow. |
| Packaging Self Service | This attribute provides access to perform activities on the **Packaging - Self Service step** of the project's workflow. |
| Packaging Factory Service | This attribute provides access to perform activities on the **Packaging Factory Service** step of the project's workflow. |
| Testing Self Service | This attribute provides access to perform activities on the **Testing - Self Service step** of the project's workflow. |

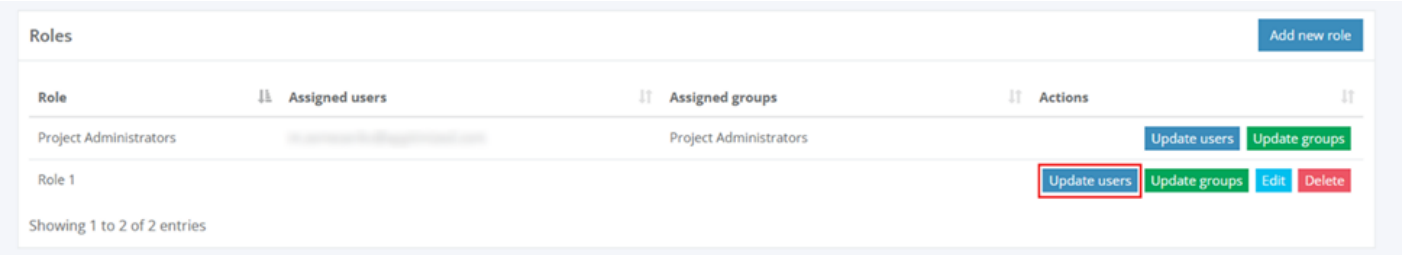
| | |
|---|---|
| Download | This attribute provides access to perform the **Download** step in the workflow. |
| **Updates** | |
| View | This attribute provides view access to the Updates feature of Apptimized. |
| Modify | This attribute provides permissions to operate with updates, including tracking, editing, and processing. |
| Emails | This attribute enables receiving e-mail notifications about updates.<br>The option becomes available when Notifications is selected for the role. |
| **File Storage** (available if the Storage feature is enabled in the project settings) | |
| Full control | This attribute provides permissions to download, upload, and remove files and directories in project storage. |
| Upload | This attribute provides permission to upload files and create directories in project storage. |
| Download | This attribute provides permission to access, view, and download content from project storage. |

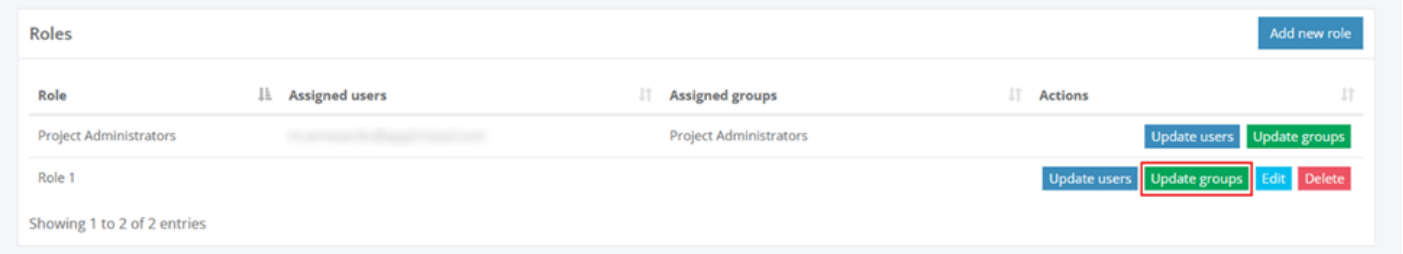
Apptimized shows the following notification and screen when successful:



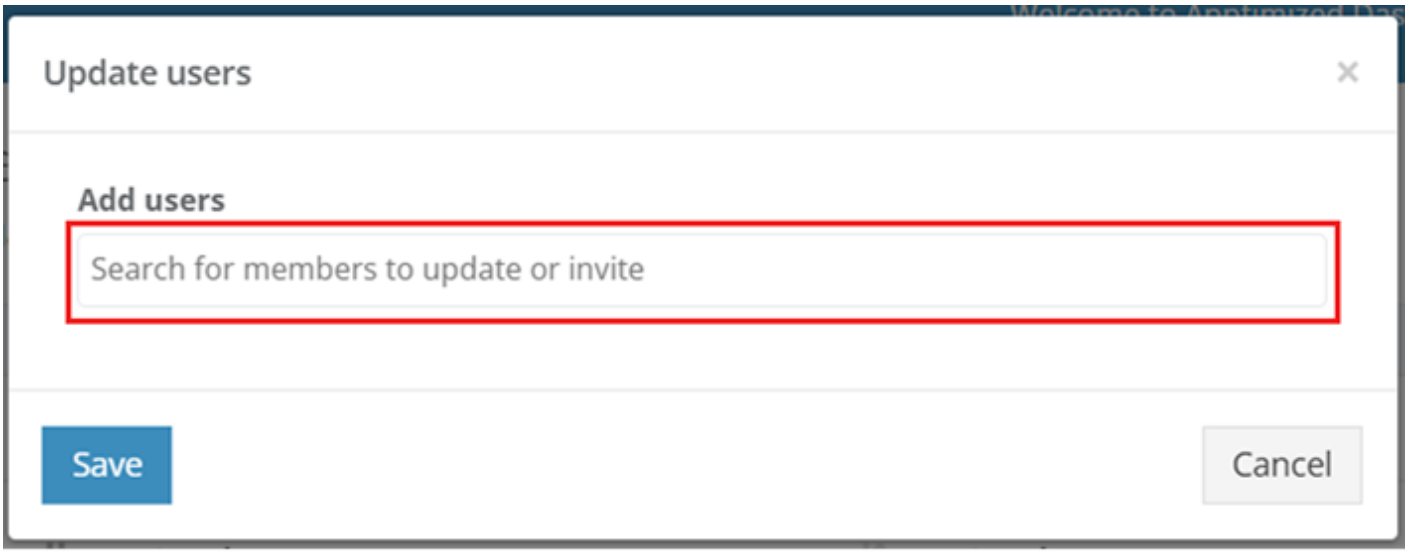

# Manage a role

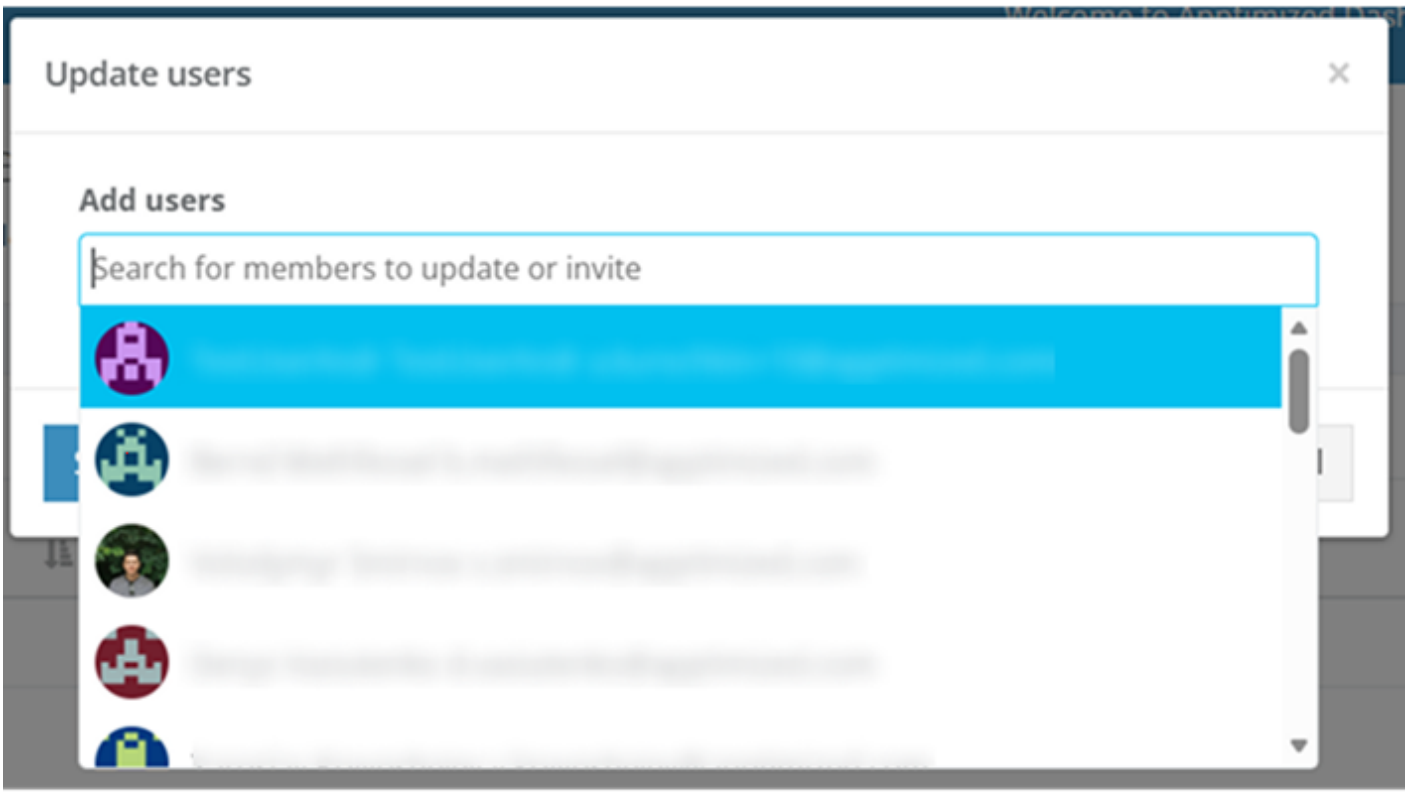
Users can be added to the role via the **Update users** or **Update groups** buttons.



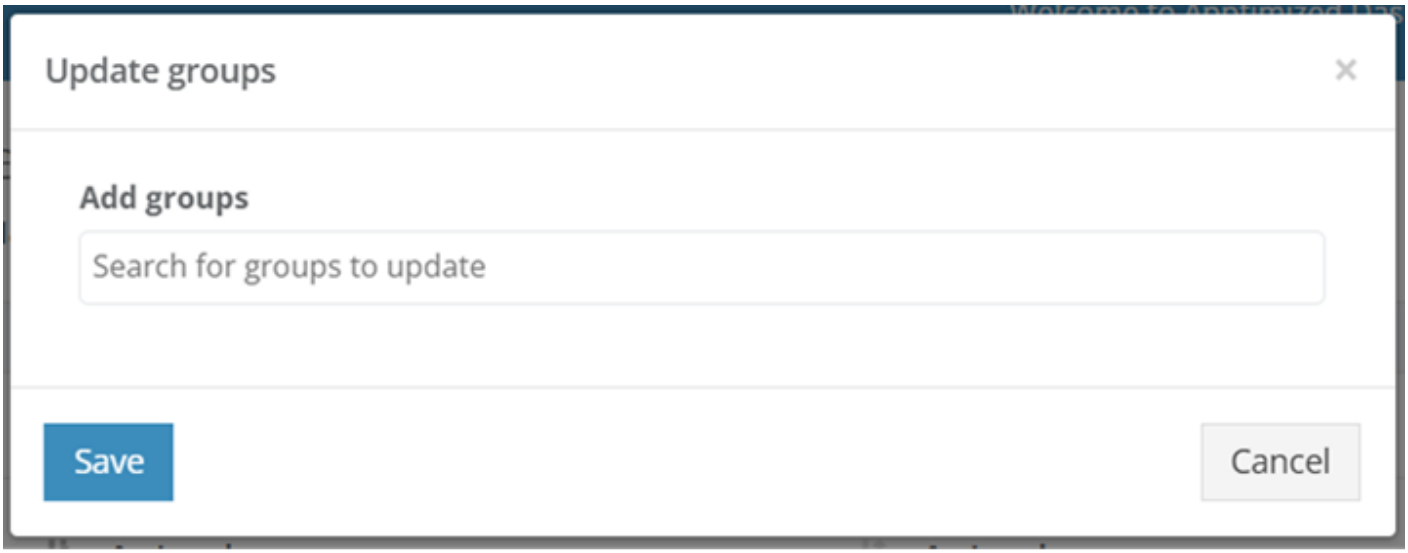



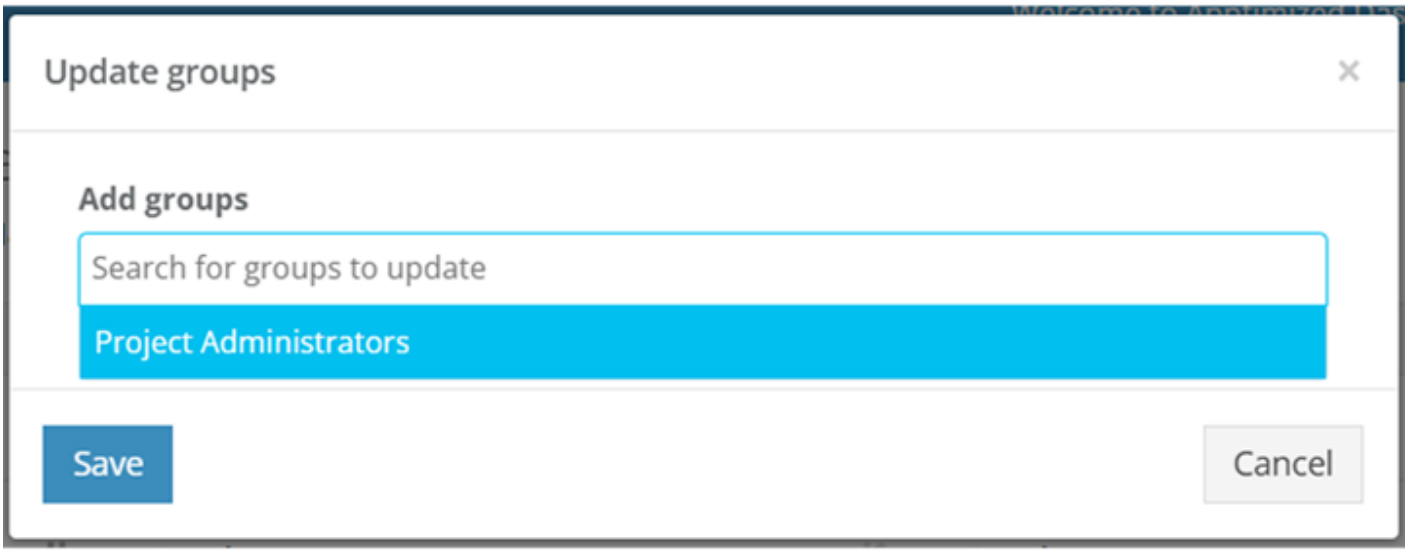

A user or group can be selected on the following screens. The Save button applies the changes.


Update users
Add users
Search for members to update or invite
Save
Cancel


Update users
Add users
Search for members to update or invite


Update users
Add users
Save
Cancel

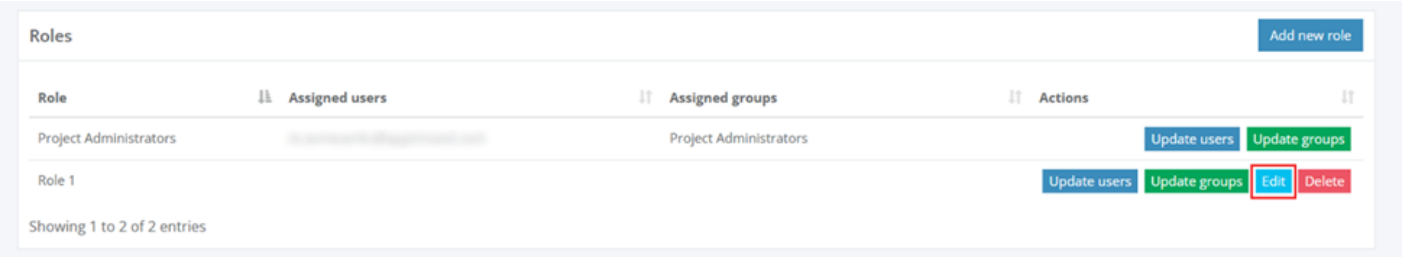


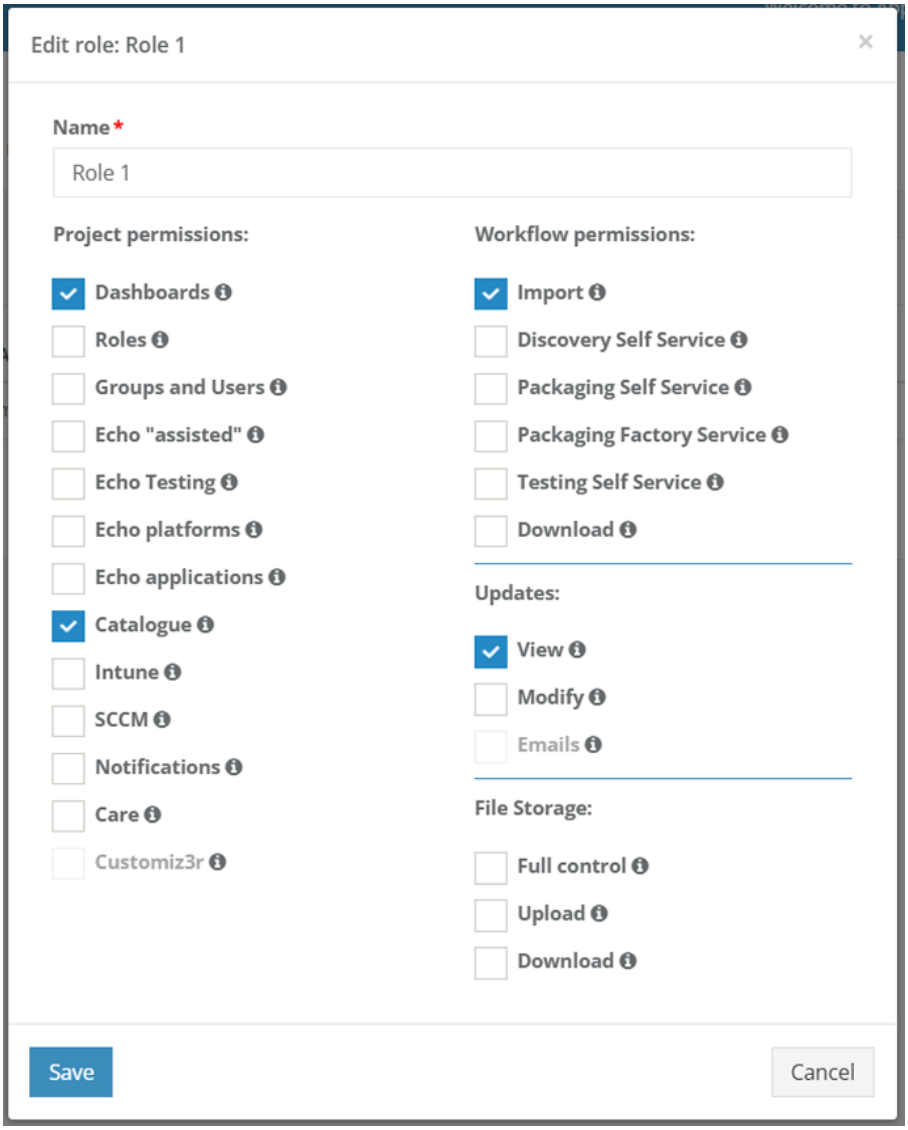





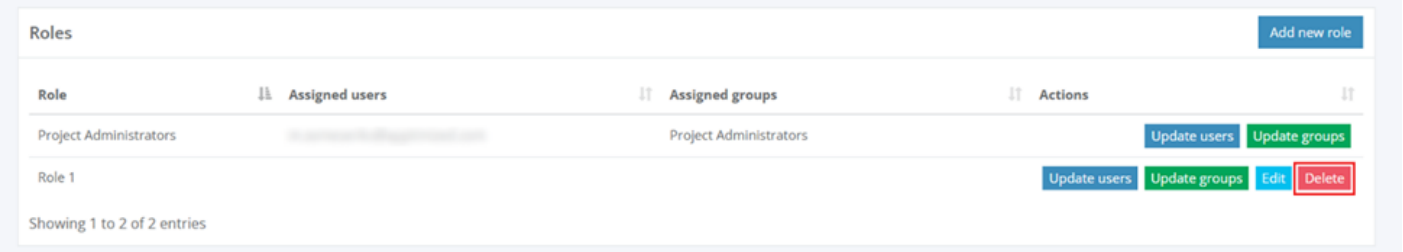


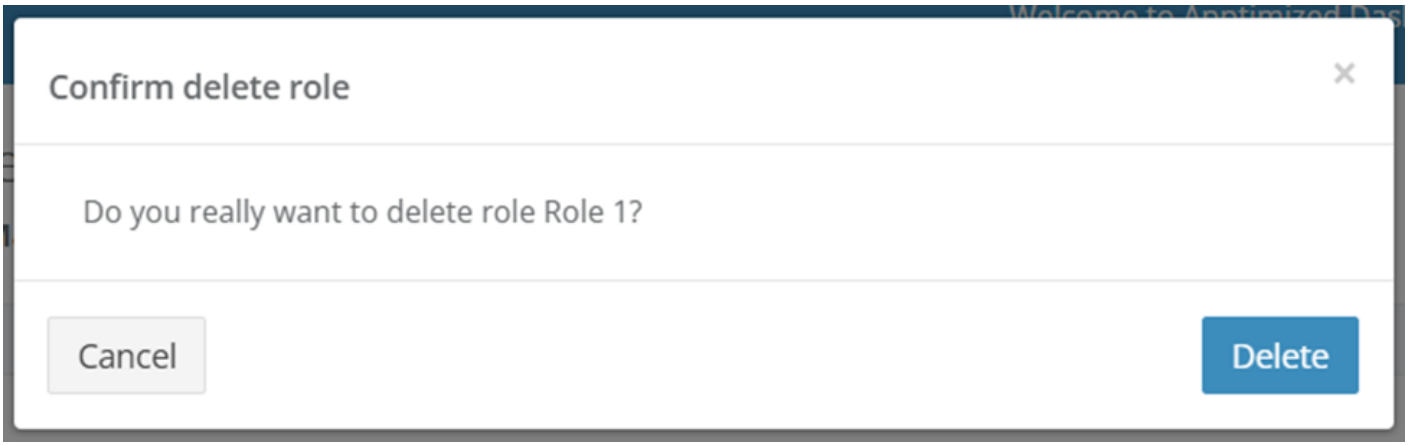
The **Edit** button allows modifying an existing role. The same steps apply as when adding a new role.




The role can be removed by selecting the **Delete** button and confirming the action.






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