

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 Aptimized email notifications (i.e., which users will receive the email notifications).

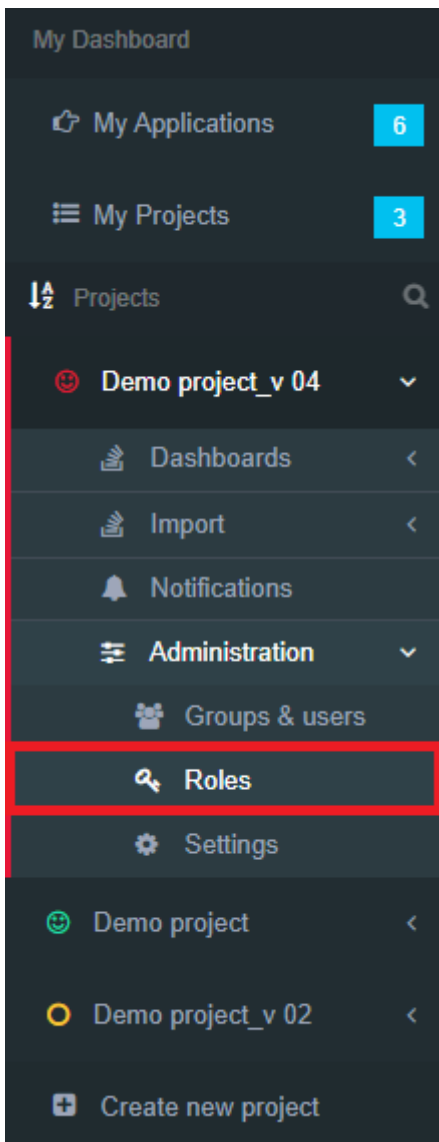
Once the workflow reaches a specific step, the assignment rules will ensure that the task is assigned to the correct group of users (or a user). This will prevent from performing actions by unauthorized users.

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

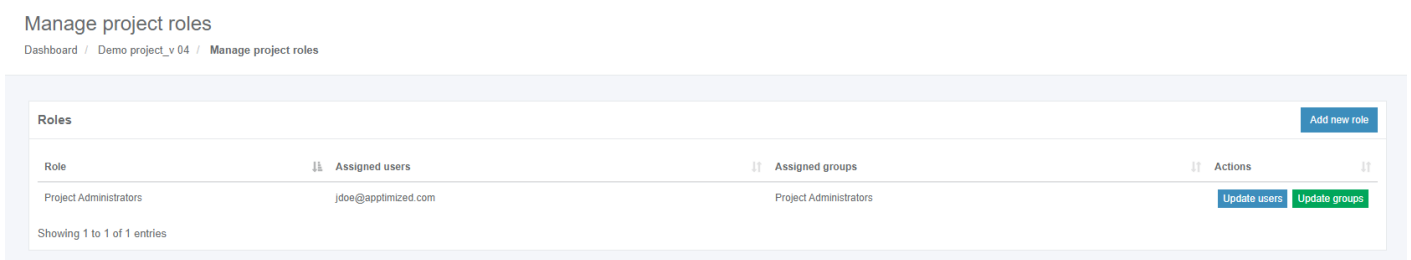
To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

Create a role

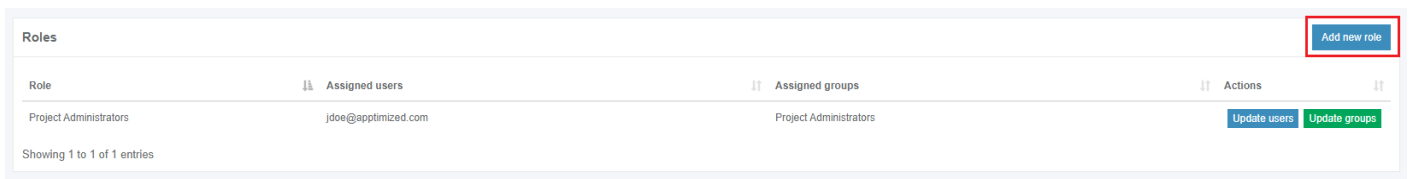
The option to create a role with needed permissions is available under **Roles** in project settings (**Project** menu > **Administration** > **Roles**).



Apptimized shows the following screen when successful:



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



Apptimized shows the following modal window when successful:

Add new role

Name *

Project permissions:

☐ Dashboards ⓘ

☐ Access to all apps ⓘ

☐ Roles ⓘ

☐ Groups and Users ⓘ

☐ File Storage ⓘ

☐ View Updates ⓘ

☐ Echo "assisted" ⓘ

☐ Echo Testing ⓘ

☐ Echo platforms ⓘ

☐ Echo applications ⓘ

☐ Catalogue ⓘ

☐ Intune ⓘ

☐ SCCM ⓘ

☐ View Holistic portfolio ⓘ

☐ Manage Holistic portfolio ⓘ

☐ Hypervisors ⓘ

☐ Azure VMs ⓘ

Workflow permissions:

☐ Import ⓘ

☐ Discovery Self Service ⓘ

☐ Discovery Factory Service ⓘ

☐ Packaging Self Service ⓘ

☐ Packaging Factory Service ⓘ

☐ Testing Self Service ⓘ

Add

Cancel

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

Add new role

Name *

Project permissions:

Workflow permissions:

☐ Dashboards ⓘ
☐ Access to all apps ⓘ
☐ Roles ⓘ
☐ Groups and Users ⓘ
☐ File Storage ⓘ
☐ View Updates ⓘ
☐ Echo "assisted" ⓘ
☐ Echo Testing ⓘ
☐ Echo platforms ⓘ
☐ Echo applications ⓘ
☐ Catalogue ⓘ
☐ Intune ⓘ
☐ SCCM ⓘ
☐ View Holistic portfolio ⓘ
☐ Manage Holistic portfolio ⓘ
☐ Hypervisors ⓘ
☐ Azure VMs ⓘ

☐ Import ⓘ
☐ Discovery Self Service ⓘ
☐ Discovery Factory Service ⓘ
☐ Packaging Self Service ⓘ
☐ Packaging Factory Service ⓘ
☐ Testing Self Service ⓘ

Add
Cancel

Add new role

Name *

Role 1

Project permissions:

Workflow permissions:

☒ Dashboards ⓘ
☐ Access to all apps ⓘ
☒ Roles ⓘ
☒ Groups and Users ⓘ
☐ File Storage ⓘ
☐ View Updates ⓘ
☐ Echo "assisted" ⓘ
☐ Echo Testing ⓘ
☐ Echo platforms ⓘ
☐ Echo applications ⓘ
☐ Catalogue ⓘ
☐ Intune ⓘ
☐ SCCM ⓘ
☐ View Holistic portfolio ⓘ
☐ Manage Holistic portfolio ⓘ
☐ Hypervisors ⓘ
☐ Azure VMs ⓘ

☒ Import ⓘ
☐ Discovery Self Service ⓘ
☐ Discovery Factory Service ⓘ
☐ Packaging Self Service ⓘ
☐ Packaging Factory Service ⓘ
☐ Testing Self Service ⓘ
☐ Testing Factory Service ⓘ

Add
Cancel

Table 1. Role attributes

| Attribute | Description |
|----------------------------|---|
| Project permissions | |
| Dashboards | This attribute provides access to the project dashboard. |
| Access to all apps | This attribute provides 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. |
| View Updates | This attribute provides access to the Update Monitoring feature of Apptimized including e-mail notifications. |
| 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. The option becomes active when SCCM is enabled for the project. |
| Intune | This attribute provides access to perform Intune activities within the project. The option becomes active when Intune is enabled for the project. |
| View Holistic portfolio | This attribute provides access to view Holistic portfolio. |
| Manage Holistic portfolio | This attribute provides access to manage Holistic portfolio. |
| Hypervisors | This attribute enables to set up Hypervisors settings. |
| Azure VMs | This attribute enables to setup Azure virtualization settings |
| 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. |
| Testing Factory Service | This attribute provides access to perform activities on the Testing - Factory Service step of the project's workflow. |

Apptimized shows the following notification and screen when successful:

Manage project roles

Dashboard / Demo project_v 04 / Manage project roles

Role Role 1 created successfully



| Roles | | | | Add new role |
|-----------------------------|---------------------|------------------------|--------------|---------------------------|
| Role | Assigned users | Assigned groups | Actions | |
| Project Administrators | jdoe@apptimized.com | Project Administrators | Update users | Update groups |
| Role 1 | | | Update users | Update groups Edit Delete |
| Showing 1 to 2 of 2 entries | | | | |

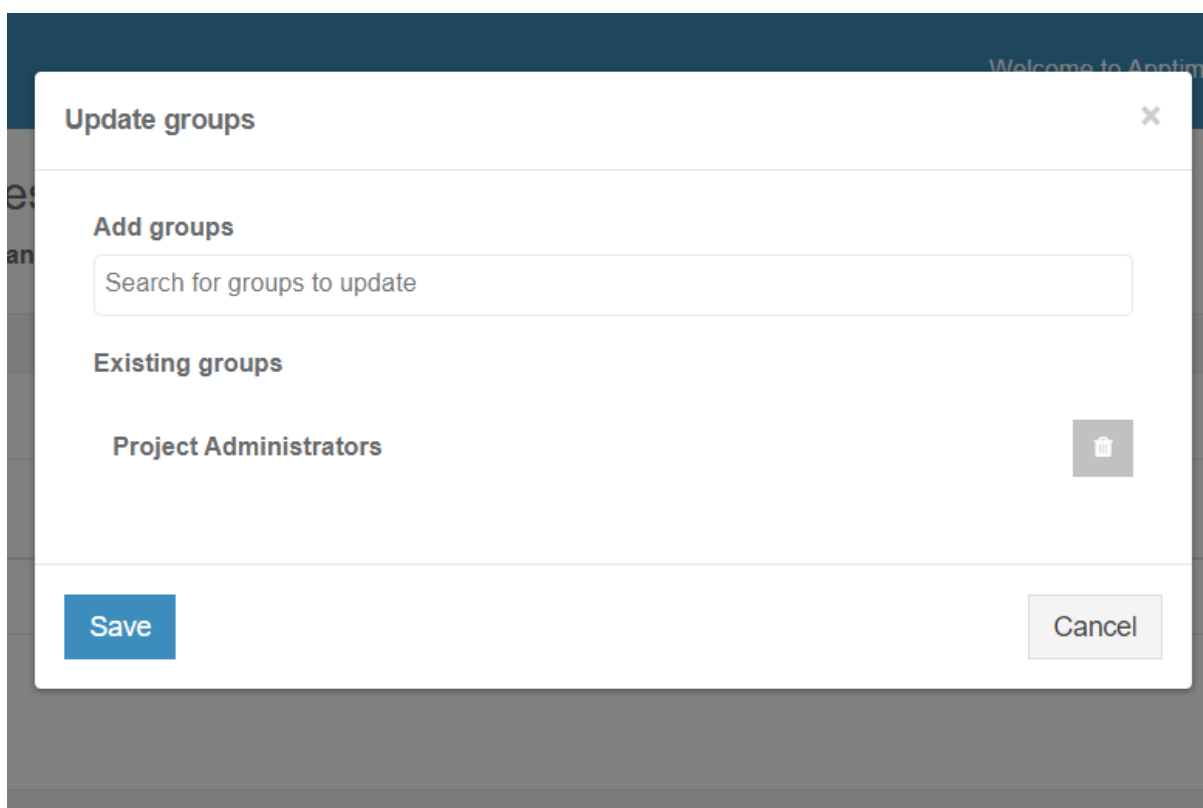
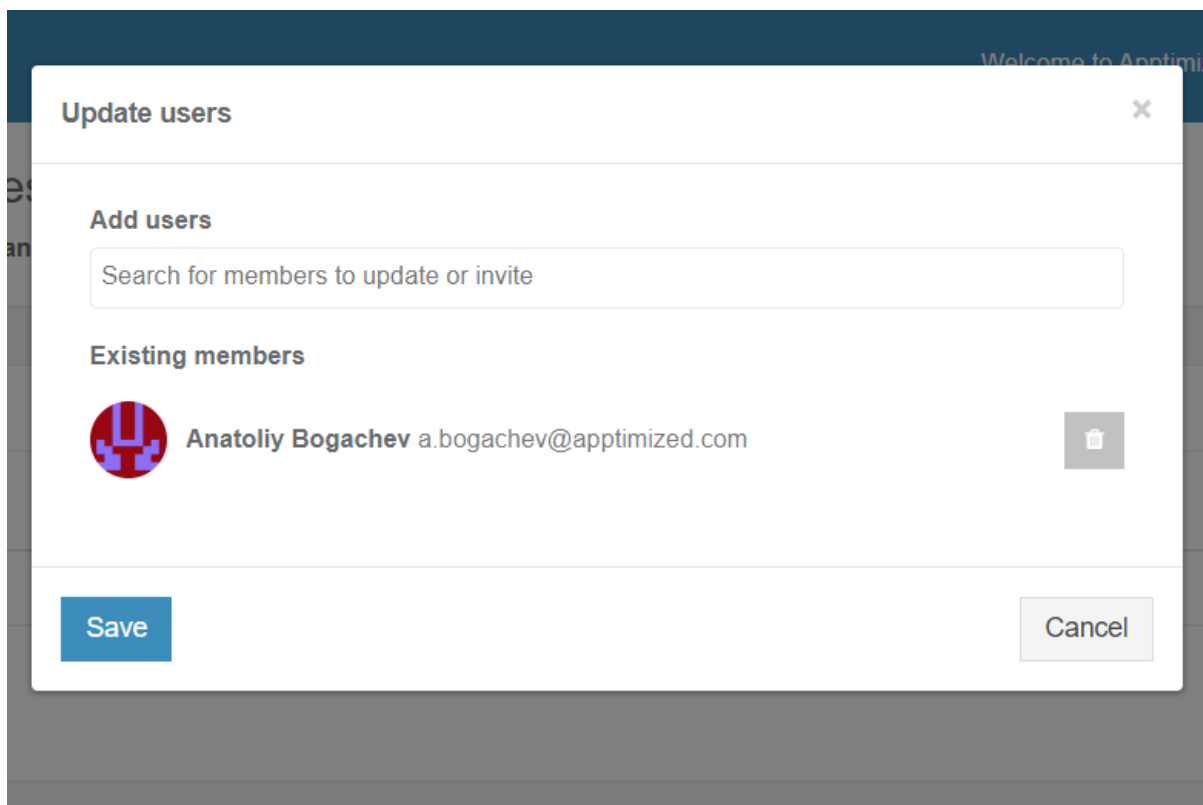
Manage a role

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

| Roles | | | | Add new role |
|-----------------------------|------------------------------|------------------------|--------------|---------------------------|
| Role | Assigned users | Assigned groups | Actions | |
| Project Administrators | o.hryshchenko@apptimized.com | Project Administrators | Update users | Update groups |
| Role 1 | | | Update users | Update groups Edit Delete |
| Showing 1 to 2 of 2 entries | | | | |

| Roles | | | | Add new role |
|-----------------------------|------------------------------|------------------------|--------------|---------------------------|
| Role | Assigned users | Assigned groups | Actions | |
| Project Administrators | o.hryshchenko@apptimized.com | Project Administrators | Update users | Update groups |
| Role 1 | | | Update users | Update groups Edit Delete |
| Showing 1 to 2 of 2 entries | | | | |

A new group or user can be selected on the next screens, and click on **Save** persists all changes.



A current role can be changed with the **Edit** button and by following the same set of operations as for adding a new role.

| Roles | | | | Add new role |
|------------------------|------------------------------|------------------------|--------------|---------------------------|
| Role | Assigned users | Assigned groups | Actions | |
| Project Administrators | o.hryshchenko@apptimized.com | Project Administrators | Update users | Update groups |
| Role 1 | | | Update users | Update groups Edit Delete |

Showing 1 to 2 of 2 entries

Edit role: project role

Name *

project role

Project permissions:

☐ Dashboards ⓘ
☐ Access to all apps ⓘ
☐ Roles ⓘ
☐ Groups and Users ⓘ
☐ File Storage ⓘ
☐ View Updates ⓘ
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☐ Manage Holistic portfolio ⓘ
☒ Hypervisors ⓘ
☒ Azure VMs ⓘ

Workflow permissions:

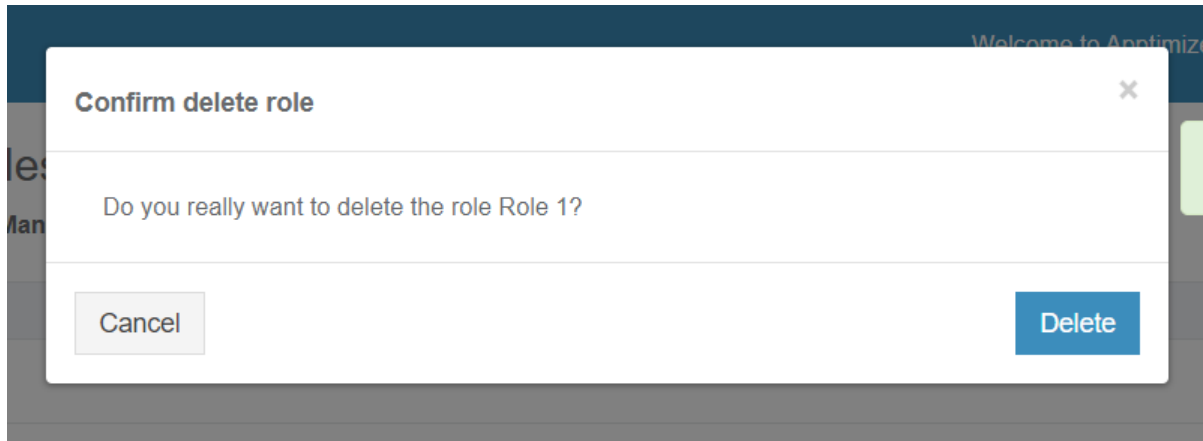
☐ Import ⓘ
☐ Discovery Self Service ⓘ
☐ Discovery Factory Service ⓘ
☐ Packaging Self Service ⓘ
☐ Packaging Factory Service ⓘ
☐ Testing Self Service ⓘ

Save

Cancel

The role can be removed by clicking on the **Delete** button and after providing a confirmation.

| Roles | | | | Add new role |
|-----------------------------|--|------------------------|--|------------------------------|
| Role | Assigned users | Assigned groups | Actions | |
| Project Administrators | o.hryshchenko@apptimized.com | Project Administrators | Update users Update groups | |
| Role 1 | | | Update users Update groups Edit Delete | |
| Showing 1 to 2 of 2 entries | | | | |



Revision #3

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