

# 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).

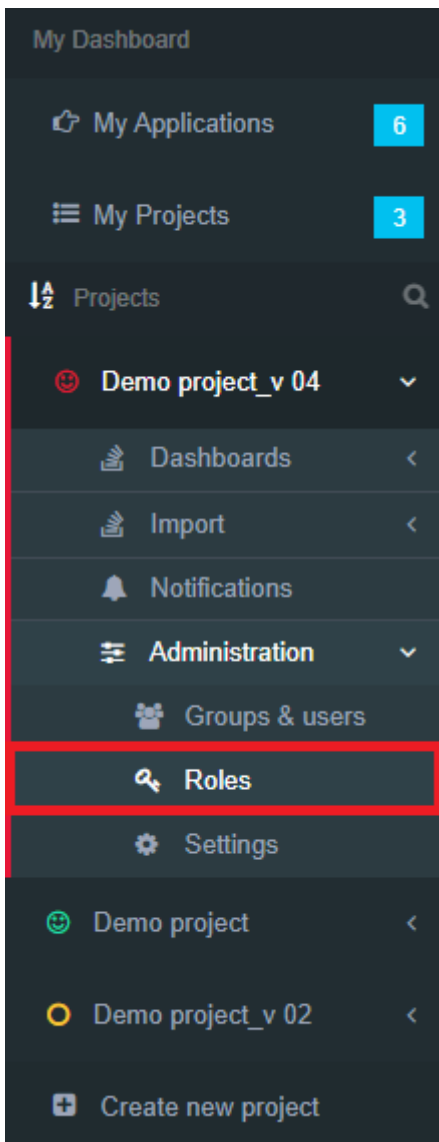
Once the workflow reaches a specific step, the assignment rules will ensure that the task is assigned to the correct group of users (or a user). This will prevent from performing actions by unauthorized users.

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

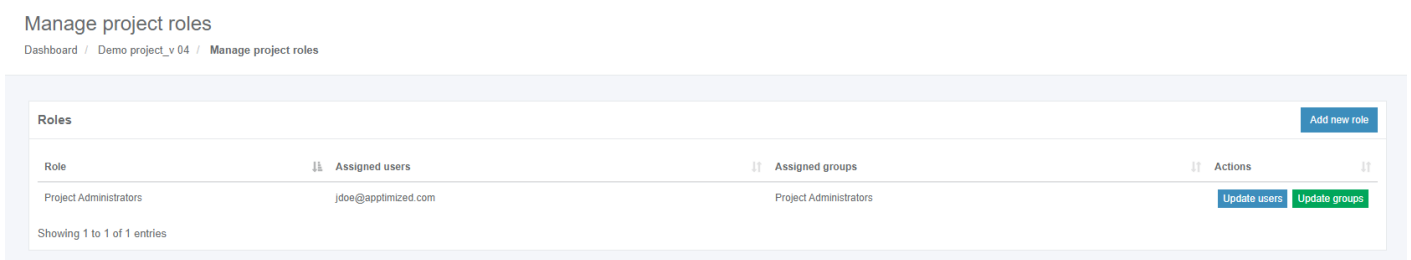
To complete the tasks with role assignments, a user must be a Project administrator or must have permission for these activities.

## Create a role

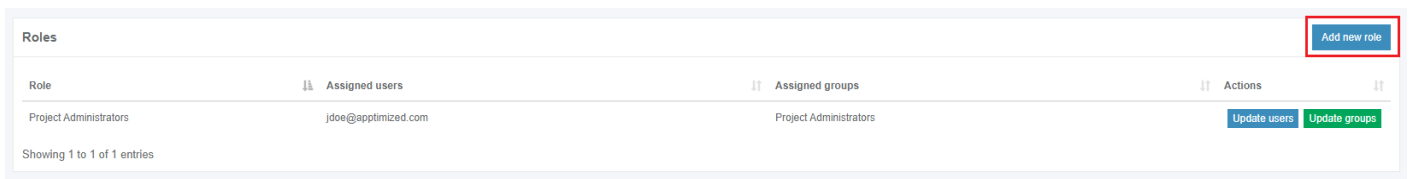
The option to create a role with needed permissions is available under **Roles** in project settings ( **Project** menu > **Administration** > **Roles** ).



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
<b>Project permissions</b>	
Dashboards	This attribute provides access to the project dashboard.
Access to all apps	This attribute provides access to all apps if the <b>Application owner</b> 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
<b>Workflow permissions</b>	
Import	This attribute provides access to perform activities on the <b>Import</b> step of the project's workflow.
Discovery Self Service	This attribute provides access to perform activities on the <b>Discovery - Self Service</b> step of the project's workflow.
Discovery Factory Service	This attribute provides access to perform activities on the <b>Discovery - Factory Service</b> step of the project's workflow.
Packaging Self Service	This attribute provides access to perform activities on the <b>Packaging - Self Service step</b> of the project's workflow.
Packaging Factory Service	This attribute provides access to perform activities on the <b>Packaging Factory Service</b> step of the project's workflow.
Testing Self Service	This attribute provides access to perform activities on the <b>Testing - Self Service step</b> of the project's workflow.
Testing Factory Service	This attribute provides access to perform activities on the <b>Testing - Factory Service</b> 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				

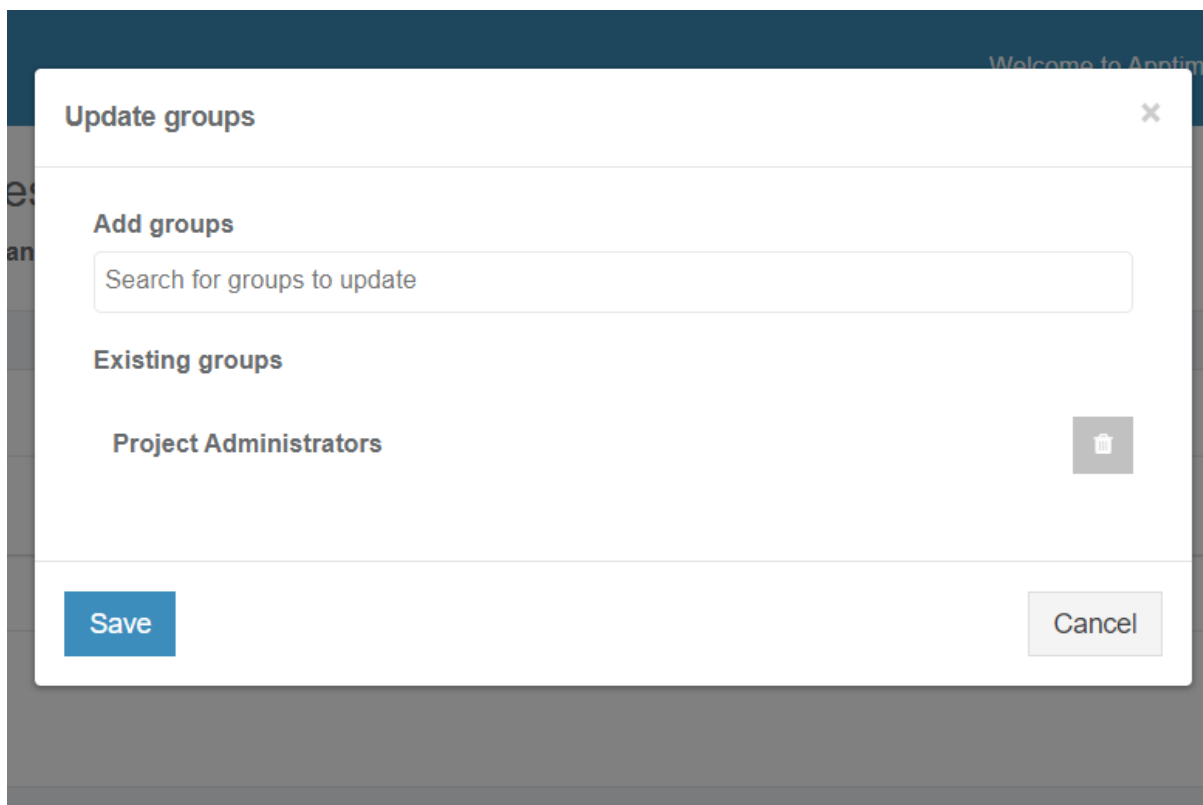
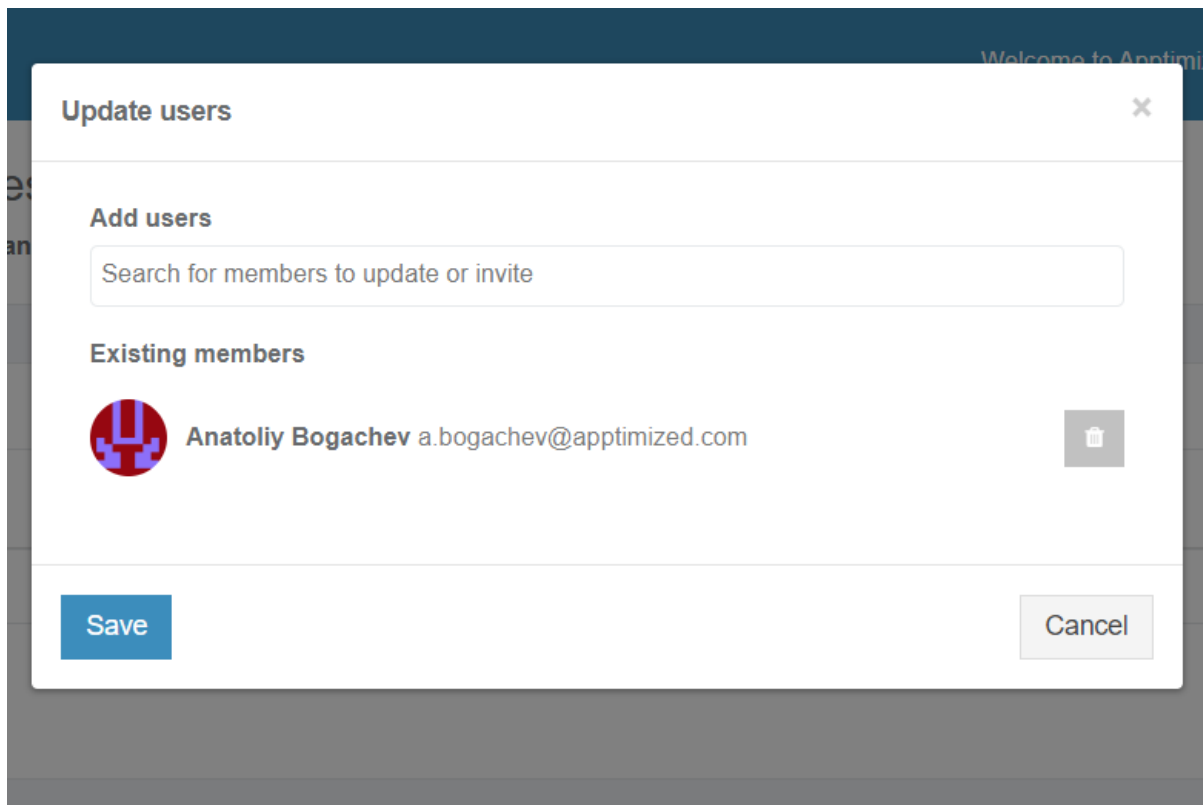
# Manage a role

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				<a href="#">Add new role</a>
Role	Assigned users	Assigned groups	Actions	
Project Administrators	o.hryshchenko@apptimized.com	Project Administrators	<a href="#">Update users</a>	<a href="#">Update groups</a>
Role 1			<a href="#">Update users</a>	<a href="#">Update groups</a> <a href="#">Edit</a> <a href="#">Delete</a>
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 ⓘ  
☐ Echo "assisted" ⓘ  
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☐ 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 ⓘ

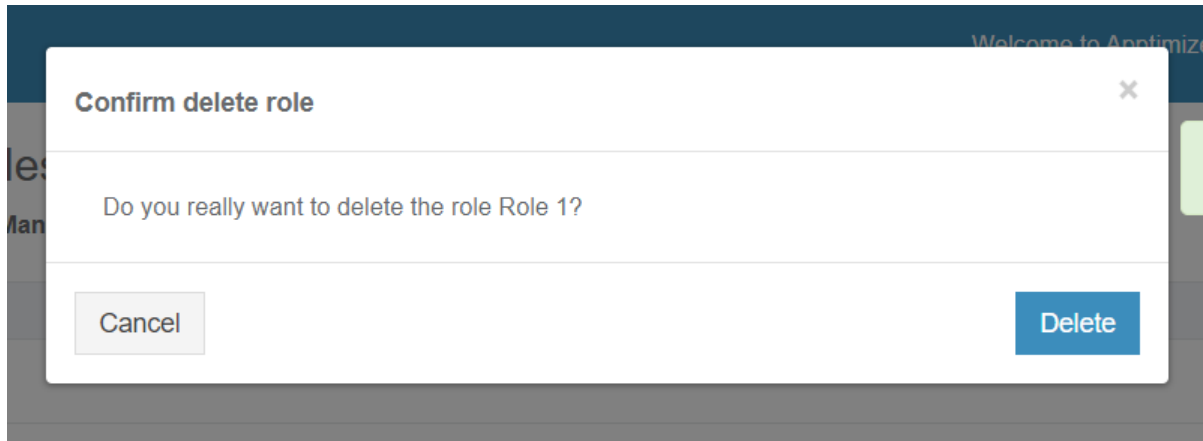
Save

Cancel

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



Roles				<a href="#">Add new role</a>
Role	Assigned users	Assigned groups	Actions	
Project Administrators	<a href="#">o.hryshchenko@apptimized.com</a>	Project Administrators	<a href="#">Update users</a> <a href="#">Update groups</a>	
Role 1			<a href="#">Update users</a> <a href="#">Update groups</a> <a href="#">Edit</a> <a href="#">Delete</a>	
Showing 1 to 2 of 2 entries				



Revision #3

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