

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).

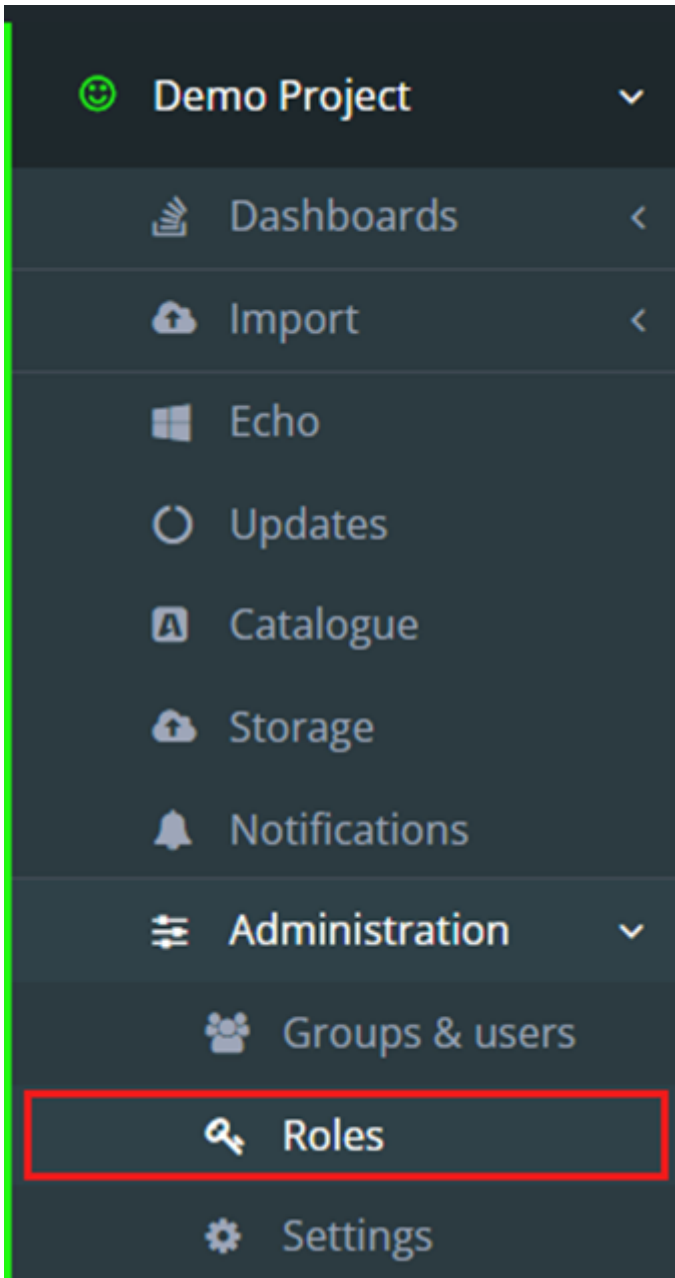
Once the workflow reaches a specific step, the assignment rules will ensure that the task is assigned to the correct group of users (or a user). This will prevent from performing actions by unauthorized users.

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 opens the following screen:

Manage project roles

Dashboard / Demo Project / Manage project roles

Roles				Add new role
Role	Assigned users	Assigned groups	Actions	
Project Administrators		Project Administrators	Update users	Update groups

Showing 1 to 1 of 1 entries

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

Roles			
Role	Assigned users	Assigned groups	Actions
Project Administrators		Project Administrators	<input type="button" value="Update users"/> <input type="button" value="Update groups"/>

Showing 1 to 1 of 1 entries

Apptimized shows the following modal window when successful:

Add new role
✕

Name *

Project permissions:

- Dashboards ⓘ
- Roles ⓘ
- Groups and Users ⓘ
- Echo "assisted" ⓘ
- Echo Testing ⓘ
- Echo platforms ⓘ
- Echo applications ⓘ
- Catalogue ⓘ
- Intune ⓘ
- SCCM ⓘ
- Notifications ⓘ
- Care ⓘ
- Customiz3r ⓘ

Workflow permissions:

- Import ⓘ
- Discovery Self Service ⓘ
- Packaging Self Service ⓘ
- Packaging Factory Service ⓘ
- Testing Self Service ⓘ
- Download ⓘ

Updates:

- View ⓘ
- Modify ⓘ
- Emails ⓘ

File Storage:

- Full control ⓘ
- Upload ⓘ
- Download ⓘ

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

Add new role

Name *

Project permissions:

- Dashboards ⓘ
- Roles ⓘ
- Groups and Users ⓘ
- Echo "assisted" ⓘ
- Echo Testing ⓘ
- Echo platforms ⓘ
- Echo applications ⓘ
- Catalogue ⓘ
- Intune ⓘ
- SCCM ⓘ
- Notifications ⓘ
- Care ⓘ
- Customiz3r ⓘ

Workflow permissions:

- Import ⓘ
- Discovery Self Service ⓘ
- Packaging Self Service ⓘ
- Packaging Factory Service ⓘ
- Testing Self Service ⓘ
- Download ⓘ

Updates:

- View ⓘ
- Modify ⓘ
- Emails ⓘ

File Storage:

- Full control ⓘ
- Upload ⓘ
- Download ⓘ

Add Cancel

Add new role

Name *

Project permissions:

- Dashboards ⓘ
- Roles ⓘ
- Groups and Users ⓘ
- Echo "assisted" ⓘ
- Echo Testing ⓘ
- Echo platforms ⓘ
- Echo applications ⓘ
- Catalogue ⓘ
- Intune ⓘ
- SCCM ⓘ
- Notifications ⓘ
- Care ⓘ
- Customiz3r ⓘ

Workflow permissions:

- Import ⓘ
- Discovery Self Service ⓘ
- Packaging Self Service ⓘ
- Packaging Factory Service ⓘ
- Testing Self Service ⓘ
- Download ⓘ

Updates:

- View ⓘ
- Modify ⓘ
- Emails ⓘ

File Storage:

- Full control ⓘ
- Upload ⓘ
- Download ⓘ

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.
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.
Notifications	This attribute provides access to project notification settings.
Care	This attribute provides access to Aptimized Care functionality within the project.
Customiz3r	This attribute allows access to receive custom packages from the Care service. 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. 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 project roles Role Role 1 created successfully. ✕

Dashboard / Demo Project / Manage project roles

Roles Add new role

Role	Assigned users	Assigned groups	Actions
Project Administrators	View assigned users	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	View assigned users	Project Administrators	Update users Update groups
Role 1			Update users Update groups Edit Delete

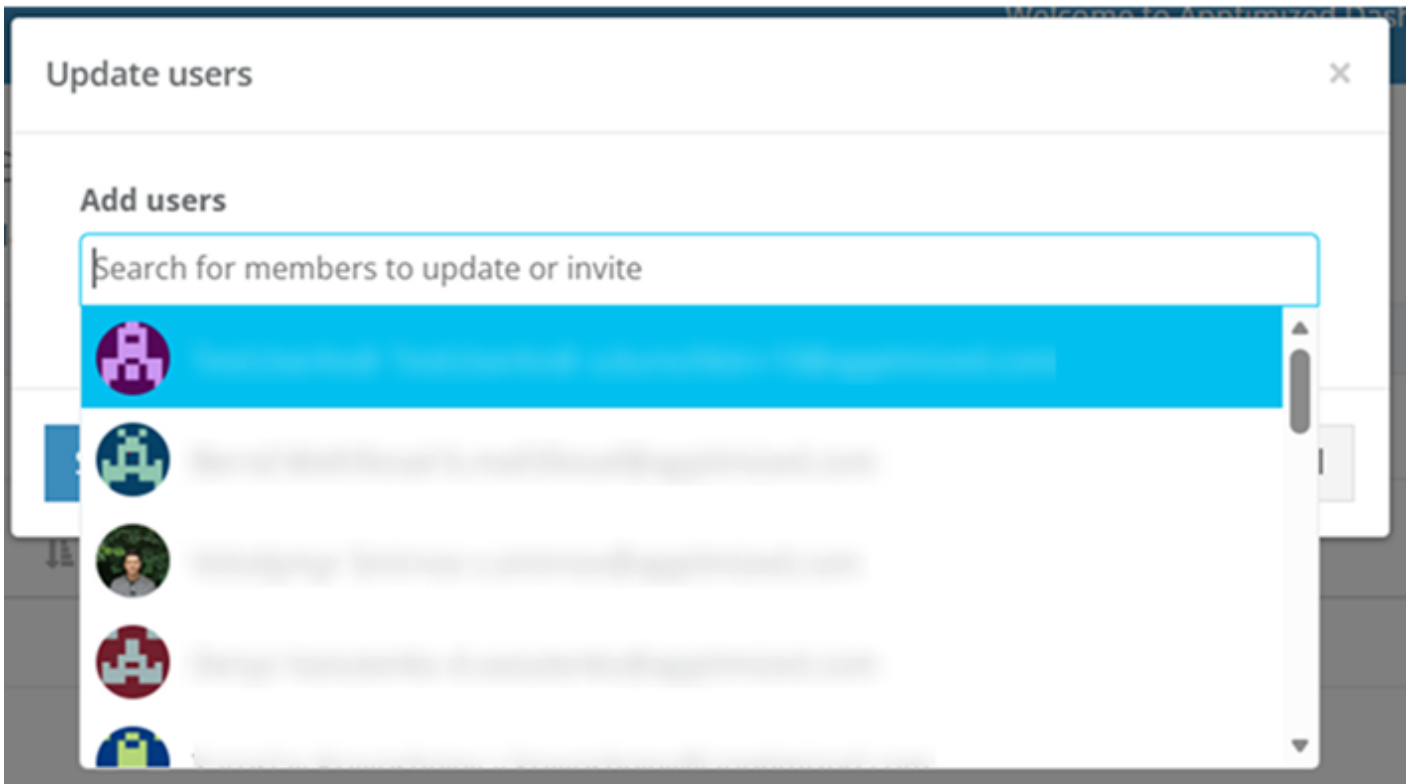
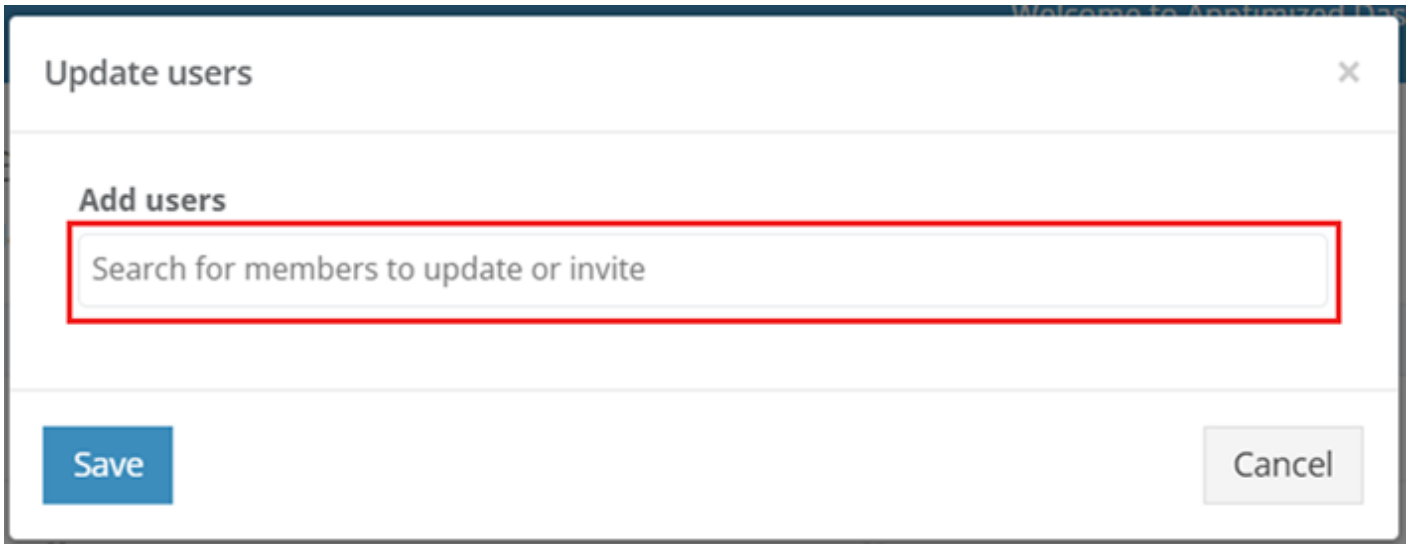
Showing 1 to 2 of 2 entries

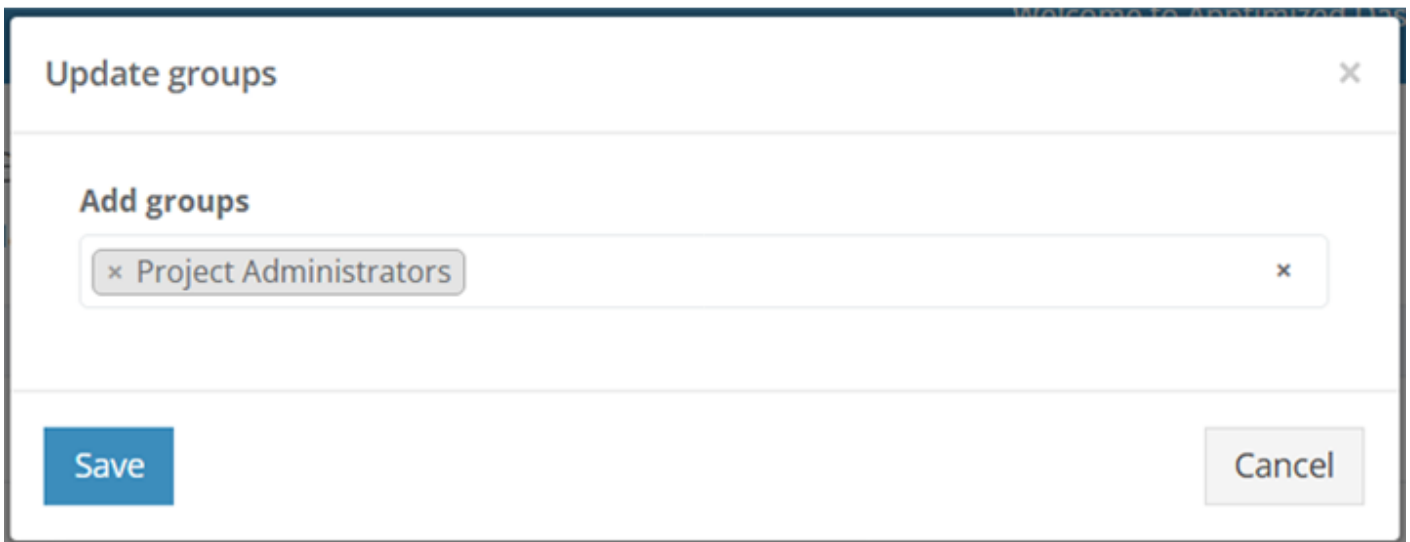
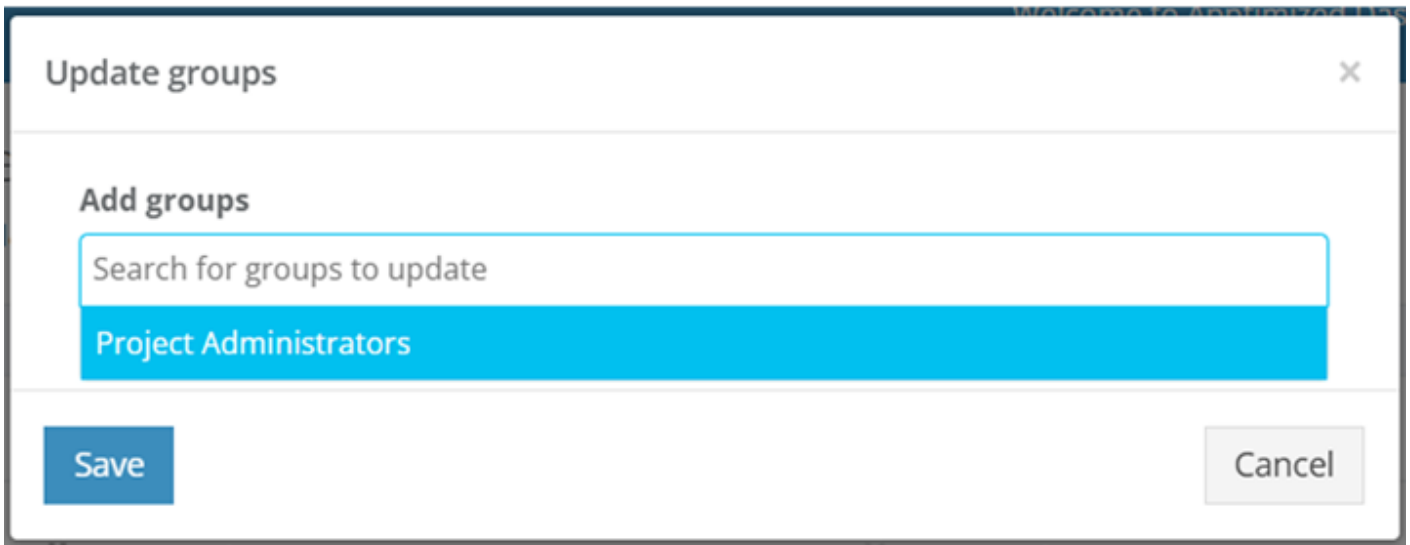
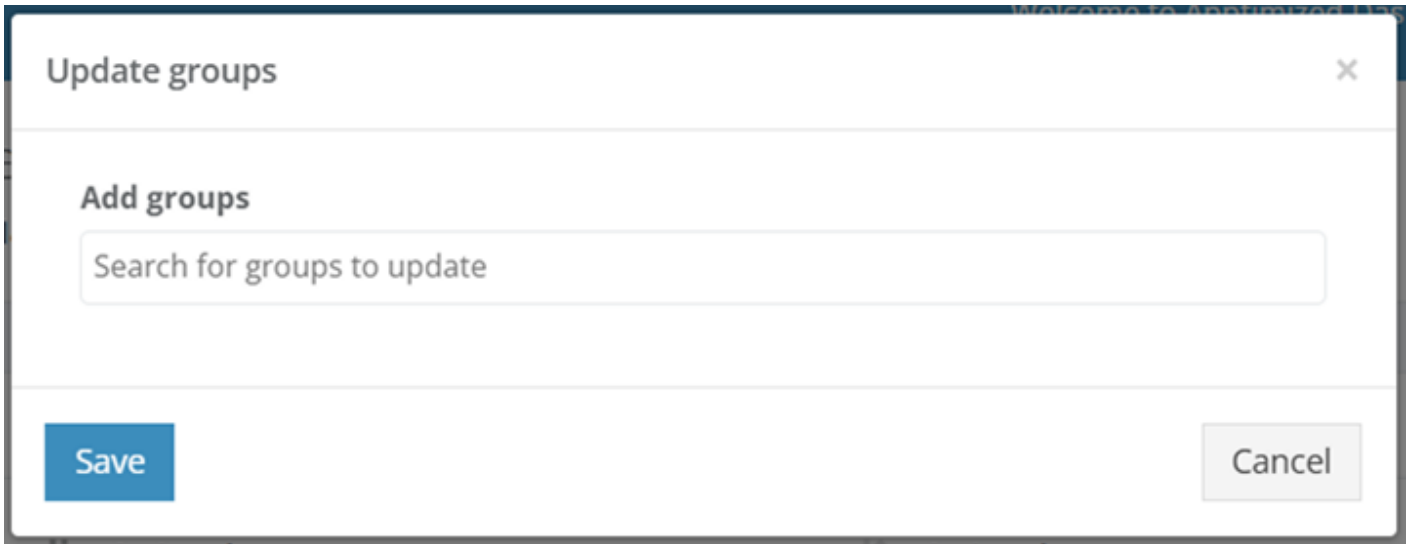
Roles Add new role

Role	Assigned users	Assigned groups	Actions
Project Administrators	View assigned users	Project Administrators	Update users Update groups
Role 1			Update users Update groups Edit Delete

Showing 1 to 2 of 2 entries

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





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

Roles				Add new role
Role	Assigned users	Assigned groups	Actions	
Project Administrators	View assigned users	Project Administrators	Update users	Update groups
Role 1			Update users	Update groups
			Edit	Delete

Showing 1 to 2 of 2 entries

Edit role: Role 1

Name *

Project permissions:

- Dashboards ⓘ
- Roles ⓘ
- Groups and Users ⓘ
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Workflow permissions:

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Updates:

- View ⓘ
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- Emails ⓘ

File Storage:

- Full control ⓘ
- Upload ⓘ
- Download ⓘ

Save
Cancel

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

Roles				Add new role
Role	Assigned users	Assigned groups	Actions	
Project Administrators	View assigned users	Project Administrators	Update users	Update groups
Role 1			Update users	Update groups
			Edit	Delete

Showing 1 to 2 of 2 entries

Confirm delete role



Do you really want to delete role Role 1?

Cancel

Delete

Revision #5

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