Optimal Trace

Administrator User Guide

Release 5.3

Local Build: September 4, 2009, 14:27

Contents

CHAPTER 1

Introducing Optimal Trace Administrator

Optimal Trace Administrator is installed as part of both the Optimal Trace Enterprise Server and Optimal Trace Enterprise installations. This tool provides a highly flexible approach to access control allowing permissions to be set for groups of users and individual users on given projects and project baselines. This ensures that project stakeholders are allowed access and editing capability on appropriate areas of the project or baseline.

Some common usage scenarios include:

- Allowing project stakeholders such as Business Analysts/Engineering to have visibility into a project.
- Allowing the QA team to edit the Test Requirements project but have 'read-only' access to the Business Requirements.
- Restricting Engineering teams to editing certain packages and groups of requirements.
- Locking down reference projects for use throughout the organization.
- Locking down a project's Glossary, backups, baselines, and restricting access to sensitive projects.

Specific product functionality includes:

- The ability to security-enable specific projects and baselines.
- The ability to create Groups, Users and Permissions for specific Projects, Packages, the Project Glossary and Custom Properties for different parts of a project.
- The ability to configure certain users as Optimal Trace Administrators.
- The ability to use the same User Group structures for multiple projects.
- The ability to work offline and merge projects back to the repository, obeying appropriate permissions.
- The ability to monitor users connected to specific projects.
- The ability to purge log files on the server.

Groups of users can be set up with specific permissions for given projects (or baselines) allowing them to view or edit projects and sub-components. Projects can also be set as secure or not. When the user attempts to open a security-enabled project, the permissions are validated by the server software which resides on the Optimal Trace Enterprise Server. Levels of permissions dictate the perspective the client has and the level of access permitted. Clients working with offline projects can change them at will, however, permissions are checked on initiating a merge to a corresponding repository project.

Who Should Read This Guide

This documentation is intended for Optimal Trace administrators responsible for managing users and groups in Optimal Trace and setting appropriate permissions to access, create, update, and delete projects.

Getting Help

If ever you have any problems or you would like additional technical information or advice, there are several sources. In some countries, product support from Micro Focus may be available only to customers who have maintenance agreements.

If you obtained this product directly from Micro Focus, contact us as described below. If you obtained it from another source, such as an authorized distributor, contact them for help first. If they are unable to help, contact us as described below.

However you contact us, please try to include the information below, if you have it. The more information you can give, the better Product Support can help you. But if you don't know all the answers, or you think some are irrelevant to your problem, please give whatever information you have.

- The name, release (version), and build number of the product.
- Installation information, including installed options, whether the product uses local or network databases, whether it is installed in the default directories, whether it is a standalone or network installation, and whether it is a client or server installation.
- Environment information, such as the operating system and release on which the product is installed, memory, hardware/network specifications, and the names and releases of other applications that were running.
- The location of the problem in the product software, and the actions taken before the problem occurred.
- The exact product error message, if any.
- The exact application, licensing, or operating system error messages, if any.
- Your Micro Focus client, office, or site number, if available.

Contact

Our web site gives up-to-date details of contact numbers and addresses. To connect, enter *www.microfocus.com* in your browser to go to the Micro Focus home page, or go to *http://supportline.microfocus.com*.

CHAPTER 2

Starting Optimal Trace Administrator

1. Click **Start**>**Programs**>**Micro Focus**>**Optimal Trace Enterprise**>**Optimal Trace Administrator**.

   NOTE

   You can also start Optimal Trace Administrator from the Server menu. Click **Start**>**Programs**>**Micro Focus**>**Optimal Trace Enterprise**>**Optimal Trace Server**>**Optimal Trace Administrator**

   A login dialog box appears.

2. Enter a user name and password.

   The default Optimal Trace Administrator credentials are as follows:

   - **User name:** Administrator
   - **Password:** password

   NOTE

   You cannot delete the default user name *Administrator;* however, you can change the password.

3. Click **Settings**.

   The **Optimal Trace Server Details** dialog box appears.

4. Enter connection data to connect to an Optimal Trace repository server, and then click **OK**. For more information, see Optimal Trace Server Dialog Box [p. 10].

   The **Optimal Trace Server Details** closes and the login dialog box reappears.

5. Click **OK** to login.

   The login dialog box closes and Optimal Trace Administrator user interface is enabled.

Optimal Trace Server Dialog Box

Use the Optimal Trace Enterprise Server dialog box to connect to a repository server.

Figure 1. Optimal Trace Server Details Dialog Box

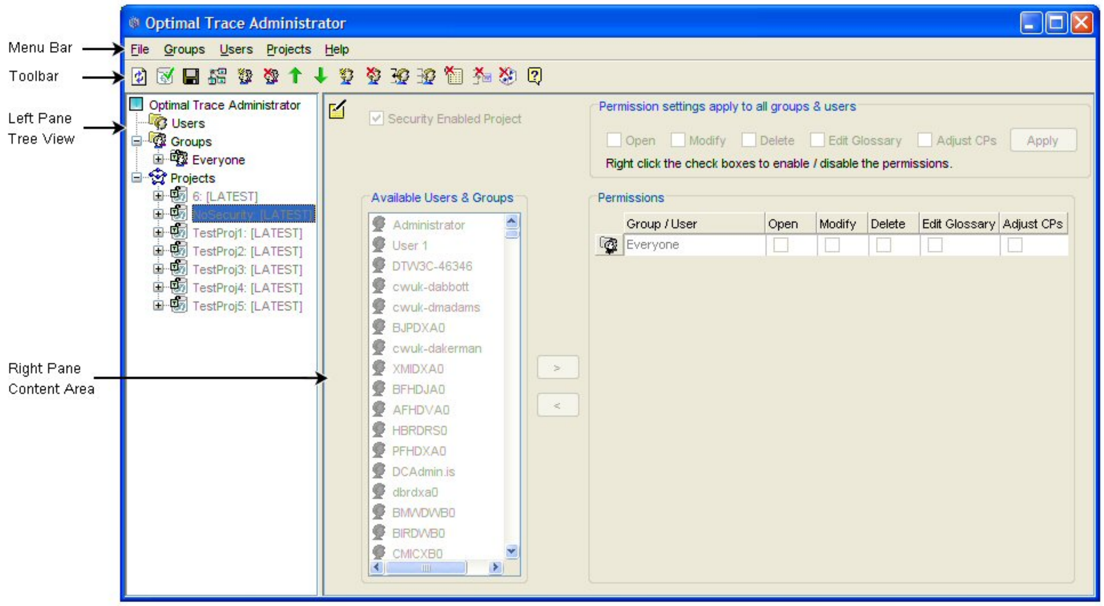
Table 1. Optimal Trace Server Details Options

Option	Description
Server Name	Enter the name for the repository server. On a standard network, this will be the machine name where Optimal Trace Enterprise Server is running. If your repository server is running on your local computer, you can type **`localhost`** in place of the computer's network name. Alternatively, if you know the IP address of the server you can enter this.
Server Port	Enter the port number that the Repository Server is running on. Ensure that this number matches the setting on the Optimal Trace Server. By default both the server and client side settings are set to 5456. For more information, refer to the *Optimal Trace Enterprise Server Help*.
Polling Interval	This is the time setting that controls how often the administration tool queries the server for updates. You can adjust this upwards if you wish to have less frequent polling from client to server.

User Interface

Once you are logged into the Optimal Trace Administrator, the following screen appears:

Figure 2. Optimal Trace Administrator User Interface



Menu Bar

Contains menus, submenus, and options.

Toolbar

Contains frequently used functions that you can access by clicking a button.

Left Pane Tree View

Contains organizational folders for users, groups, and remote Optimal Trace projects. Right-click a folder to open a context-sensitive menu.

Right Pane Content Area

Contains specific details and controls relevant to the items selected in the tree view.

CHAPTER 3

Managing Users and Groups

Using Optimal Trace Administrator, you can create a list of users and assign permissions to access, modify, and delete security enabled projects. There are two ways to create a list of users:

- By manually entering user information in the Optimal Trace Administrator user table.
- By importing user information from a directory service into the Optimal Trace Administrator user table. For more information, see Managing Users From a Directory Service [p. 14].

After creating a list of users, you can assign a collection of users to a group. Groups in Optimal Trace allow you to set permissions for users with similar responsibilities on specific teams. For example, business analysts, managers, developers, and marketing professionals. Users can appear in more than one group.

About Users

A user in Optimal Trace Administrator is any person that can access, modify, delete security enabled projects or receive notifications about projects. This section describes how to add and delete users, and how to import and update users from a directory service.

Adding Users

This topic describes how to manually add users to the Optimal Trace Administrator user table. As an alternative to manually adding users, you can import them from a directory service. For more information, see Managing Users From a Directory Service [p. 14].

1. In the left pane tree view, select **Users**.
2. Click **Users**>**Add User**.

   The user table appears with a new row added to the bottom of the table.

3. Enter user information in the columns of the row. For more information, see User Attributes [p. 17], and User Passwords [p. 18].

   a) To set the password for a user, click the **Set Password** ... button in the **Password** column.

The **Set Password** dialog box appears.

b) Enter the desired password and retype the password in the appropriate boxes.

c) Click **OK**.

4. Click **File**>**Save Changes**.

Deleting Users

You can delete individual users from the Optimal Trace Administrator user table.

NOTE

You cannot delete the reserved user *Administrator*.

1. In the left pane tree view, select **Users**.

   Optimal Trace Administrator user table appears.

2. Select the row of user to delete by clicking the grey box at the beginning of row.

   The row highlights in blue.

   NOTE

   You cannot select multiple rows to delete.

3. Click **Users**>**Delete User**.

   The **Delete User** dialog box appears and displays a deletion confirmation message.

4. Click **OK** to delete the user.

Managing Users From a Directory Service

As an alternative to manually adding and updating user information in the Optimal Trace Administrator user table, you can import and update user information from a directory service. A directory service is a software system that stores, organizes and provides access to network resource information across a Windows server domain. Optimal Trace supports directory service software, such as Microsoft Active Directory that communicates with and/or hosts directory services using Lightweight Directory Access Protocol (LDAP).

Importing Users From a Directory Service

1. Select the **Users** folder in the left pane of Optimal Trace Administrator.
2. Click **Users**>**Import Users**.

   The **Connect & Query** group box appears.

3. Under **Connection Details**, enter the directory service connection data.

   Host

   The directory service server host name.

   Port

   The port on which the directory service server runs.

User DN
: The distinguished name for the user logging into the directory service to import users.

Password
: The domain password for the user logging into the directory service to import users.

Use SSL
: Secure Sockets Layer (SSL) protocol that provides security and data integrity for directory services communicating over TCP/IP networks.

4. Click **Connect**.

   The **Search Details** group box appears.

5. Enter search criteria to filter the imported data.

   Base DN
   : Leave this box blank to search the entire directory service forest.

   Search Filter
   : Type a search filter using a combination of valid directory service attributes. The search filter syntax supports the following characters: wildcard character "*" ; logical condition characters "&" for AND, "|" for OR, and "!" for NOT. For example:

```
(directoryServiceAttribute=AttributeValue)

(username=Smith) \\returns users named 'Smith"

(username=S*) \\returns users with the names starting with 'S'

(&(username=Smith*)(department=IS))  \\returns users named 'Smith' in the IS
 dept

(|(username=S*)(username=T*))  \\returns users with names starting with 'S'
or 'T'

(&(userPrincipalName=Smith*)(!(title=Developer))(department=IS))  \\returns
users
with names starting with 'Smith' that do not have the title ‘Developer’ and
are
in the IS department
```

6. Click the **Next >** button.

   The users matching the search criteria appear.

7. Under **Available Users**, select the desired user(s).

   NOTE

   Select a specific user to see all of the directory service attributes and their values for that user in a table below the **Available Users** list.

8. Click the appropriate arrow button to add selected users to the **Imported Users** list.

NOTE

You can select multiple users and groups. To select nonconsecutive users and groups, press and hold down the `[Ctrl]` key, and then click each user and group. To select consecutive users and groups, click the first user or group, press and hold down the `[Shift]` key, and then click the last user of the group.

To search for a specific user or group, type the first few letters of the desired user or group. Any matches appear at the top of the list. Use the DOWN ARROW or UP ARROW keys to navigate through the list of matching users. This feature is also available in the attribute table of a selected user. Click on a row in the appropriate column of the table before searching through it.

9. Click **Import Users**.

   The **User(s) Imported** dialog box appears and confirms the number of imported users.

10. Click **OK**, and then **Done**.

    The Optimal Trace user table appears.

Updating Imported Users From a Directory Service

After importing users from a directory service , you can automatically update their information in the Optimal Trace Administrator user table to reflect any changes made to user information in the directory service. This includes removing users that have been deleted from the directory service.

1. Select the **Users** folder in the left pane tree view.
2. Click **Users**>**Import Users**.

   The **Connect & Update** group box appears.

3. Under **Connection Details**, enter the directory service connection data as follows:

   Host
   The directory service server host name.

   Port
   The port on which the directory service server runs.

   User DN
   The distinguished name for the user logging into the directory service to import users.

   Password
   The domain password for the user logging into the directory service to import users.

   Use SSL
   Secure Sockets Layer (SSL) protocol that provides security and data integrity for directory services communicating over TCP/IP networks.

4. Click **Connect**.

   The **Update Details** group box appears.

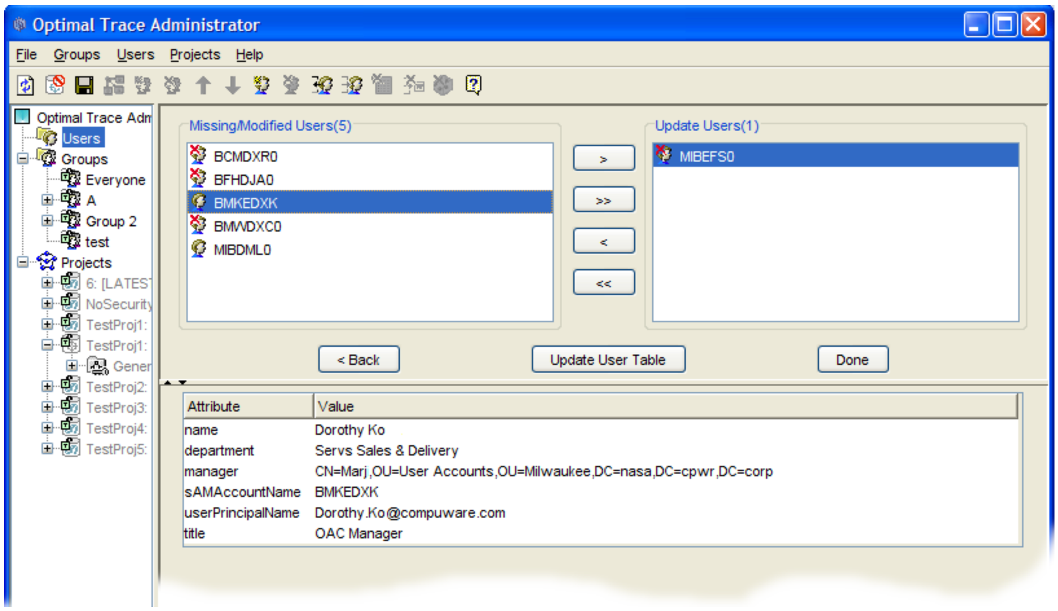
5. Enter an update filter to precisely control which users to update.

Use one of the following update filters:

```
(sAMAccountName=*)   \\updates all users
(sAMAccountName={user name})  \\updates only the specified user
(sAMAccountName={*smith*) \\updates all users with 'smith' in the user name
```

6. Click the **Next >** button.

   Optimal Trace queries the directory service, compares user information in the directory service with the Optimal Trace user table, and then displays any users that have modified information or that have been deleted from the directory service.



   Under **Missing/Modified Users**, users deleted from the directory service appear with a red 'X' in the user icon. To display information about a modified user, select the user and view the user attributes in the table below the **Missing/Modified Users** list.

7. Select the desired user(s) to update, and then use the arrow buttons to move users from the **Missing/Modified Users** list to the **Update User(s)** list.

8. Click **Update User Table**.

   The User(s) Deleted message box appears and displays a confirmation message.

9. Click **OK** to close the message box, and then click **Done**.

   The user table appears and displays the updated user information.

User Attributes

Each row in the Optimal Trace Administrator user table contains columns corresponding to the following attributes:

Table 2. User Attributes

Attribute	Description
User Name	The user name or user id of the user.
Distinguished Name	Use this attribute to provide supplemental information about the user.
Password	The password of the user. For more information, see User Passwords [p. 18].
Member of	The groups of which the user is a member.
E-mail address	The e-mail address of the user. This is used to allow users to be notified of changes made for registered project changes. For more information about notifications, refer to the *Optimal Trace Enterprise Help*
Administrator	Select the check box to give a user the permission to configure groups, users, and project and package permissions.
Title	The title of the user.
Department	The department of which the user is a member.
Manager	The manager to which the user reports.

NOTE

You can sort data in the user table by clicking a column header. An up triangle next to the column name indicates the data is sorted in ascending order. Conversely, a down triangle next to the column name indicates the data is sorted in descending order.

User Passwords

Optimal Trace supports basic authentication and Windows Integrated Authentication. In basic authentication, user passwords are manually created and stored using the Optimal Trace Administrator user table. Each time a user accesses an Optimal Trace project, the user must supply the correct password as it is defined in the user table. In Windows Integrated Authentication, Optimal Trace uses the network login password of a user to authenticate the user. For more information, refer to the topic *Setting Up Windows Integrated Authentication* in the *Optimal Trace Enterprise Server Help*.

When using basic authentication, administrators can change passwords in Optimal Trace Administrator and users can change passwords in the Optimal Trace Enterprise client. For more information, refer to the topic *Changing Project Passwords* in the *Optimal Trace Enterprise Help*.

About Groups

Groups are collections of users with similar responsibilities on specific teams. For example, business analysts, managers, developers, and marketing professionals. You can create any number of groups and assign a user to more than one group.

By default, Optimal Trace Administrator creates an *Everyone* group and assigns all users to this group. The *Everyone* group is a global group and is automatically added to the permissions of new projects. You cannot delete the *Everyone* group or remove it from the permissions of a project.

This section describes how to add and delete groups.

Adding Groups

1. In the left pane tree view, select **Groups**.
2. From the menu bar, click **Groups**>**Add Group**.

   The right pane content area displays a form in which you can create a group.
3. In the **Group Name** box, use the default name or type another name. Optionally, type a description for the group.
4. Set the default group permissions. For more information, see Setting Default Group Permissions [p. 28].

   Each time you add the group to a project, the default permissions for the group are automatically set.
5. In the **Available Users** list, select the desired users, and then use the arrow buttons to add the selected users to the **Group Members** list.
6. Click **File**>**Save Changes**.

Deleting Groups

1. In the left pane tree view, select the group to delete.
2. Click **Groups**>**Delete Group**.

   Optimal Trace deletes the group.

   NOTE

   If the group is associated with the permissions of a project, a message box will appear and prompt you to confirm the deletion.

Sorting Groups in the Tree View

To help you organize and manage user-created groups, you can sort them by name in the tree view. The default group *Everyone* is not included in the sort order and always remains at the top of the **Groups** list.

1. In the left pane tree view, select the **Groups**.
2. Select **Groups**, and then select one of the following commands:
   - **Sort Ascending**: Sorts all user-created groups appearing under **Groups** in the tree view in ascending order
   - **Sort Descending**: Sorts all user-created groups appearing under **Groups** in the tree view in descending order

After selecting a sort command, Optimal Trace Administrator sorts all user-created groups appearing under **Groups** in either ascending or descending order.

CHAPTER 4

Managing Projects

Optimal Trace projects stored remotely in an Optimal Trace repository appear in the tree view of Optimal Trace Administrator. For these remote projects, you can perform the following project functions:

- Enable or disable project security
- Delete projects and project baselines
- Delete project change history log files
- Delete project update log files
- Monitor users currently editing remote projects
- Show or hide project baselines

In addition to these project functions, you can also set permissions to control which users and groups can access, modify, and delete security enabled projects and packages. For more information, see Setting Project and Package Permissions [p. 25].

Enabling Project Security

You can either enable project security for a specific project in Optimal Trace Administrator or you can enable project security by default by selecting the **Enable New Project Security** option in Optimal Trace Enterprise Server. For more information about enabling project security by default, refer to the *Advanced Configuration Options* topic in the *Optimal Trace Enterprise Server Help*.

To enable project security for a specific project in Optimal Trace Administrator, perform the following steps:

1. In the left tree view pane, select the project for which to enable security.

   In the right pane, administration controls for the selected project appear.
2. Click the **Edit Project Permissions** button to enable editing.
3. Select the **Security Enabled Project** box.

The *Everyone* group and any other global groups appear under **Permissions**.

NOTE

You cannot remove the *Everyone* group from the project permissions.

4. Select **File**>**Save Changes**.

Disabling Project Security

To disable project security for a specific project in Optimal Trace Administrator, perform the following steps:

1. In the left tree view pane, select the project for which to disable security.

   In the right pane, administration controls for the selected project appear.
2. Click the **Edit Project Permissions** button  to enable editing.
3. Clear the **Security Enabled Project** box.

   The Disable Security dialog box appears and displays a message informing you that all permissions for the project will be removed and registered users will no longer receive project notifications.
4. Click **OK** to close the dialog box and disable security.
5. Select **File**>**Save Changes**.

Deleting Projects

In Optimal Trace Administrator, you can delete remote projects and project baselines from the repository.

NOTE

You can also delete projects from the Optimal Trace Enterprise client. For more information, refer to the *Deleting Projects* topic in the *Optimal Trace Enterprise Help*.

1. In the left tree view pane, select the project to delete.
2. Select **Projects**>**Delete Project**.

   A deletion confirmation message box appears.
3. Click **Yes** to close the message box and delete the project.

Deleting Project Log Files

In Optimal Trace Administrator, you can delete the following logs of a selected project.

- The `Change History Log` contains a list of all changes made to the project. You can view this log in the Optimal Trace Enterprise client. If you are experiencing performance problems with a project, deleting this log may improve performance.

- The `Project Update Log` is used when updating a word document that was previously generated from the project. This log file is used to record all changes that were made since the document was generated, thus allowing the document to be updated. You can safely delete it for a specific project if you do not intend to use the **Update Document** feature in the Optimal Trace Enterprise Client.

NOTE

You can still update documents that are generated after you delete the `Project Update Log`; however, you will be unable to update any documents created before you deleted the log.

1. In the left tree view pane, select the project for which to delete the desired log.
2. Select one of the following options:
   - **Projects**>**Delete Change History Log**
   - **Projects**>**Project Update Log**

   A deletion confirmation message box appears.
3. Click **Yes** to close the message box and delete the log.

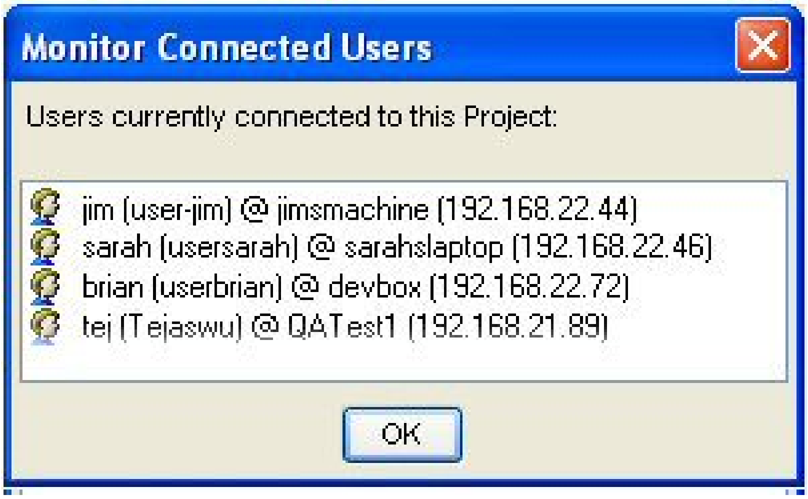
Monitoring Connected Users

In order to set or edit permissions in Optimal Trace Administrator, all users currently editing the project in the Optimal Trace Enterprise client must be logged off. In Optimal Trace Administrator, you can view all connected users of a specific project, and then either inform them to log off the project or log them off automatically by editing the permissions. After logging connected users off automatically, a message appears informing the users they are being forced offline, in which case, they are free to continue editing offline until you have saved any changes made to the permissions. For more information, see Setting Project and Package Permissions [p. 25].

1. In the left tree view pane, select a project.
2. Select **Projects**>**Monitor Connected Users**.

   If users are currently connected to the project, then the **Monitor Connected Users** dialog box appears and displays the user name and machine name of the connected user. If no users are connected to the project, then a message box appears informing you that no users are currently connected.

Figure 3. Monitor Connected Users Dialog Box



Showing or Hiding Project Baselines

You can show or hide project baselines in the left tree view pane by clicking the **Show Project Baselines** button or the **Hide Project Baselines** button on the Optimal Trace Administrator toolbar. Additionally, you can set permissions for a project baseline.

Synchronizing with the Server

To update changes made in Optimal Trace Administrator to remote projects or to retrieve changes made to projects saved in an Optimal Trace repository, you can use the **Synchronize with Server** feature in Optimal Trace Administrator.

NOTE

By default, projects are automatically synchronized every 60 seconds. To change this interval, refer to the *Advanced Configuration Options* topic in the *Optimal Trace Enterprise Server Help*.

1. Optionally, to synchronize a specific project, select the desired project in the left pane tree view.

   ### NOTE

   If you want to synchronize multiple projects or retrieve project changes from the server or client, you do not have to select a project.

2. Select **Projects**>**Synchronize with Server**.

   Optimal Trace Administrator synchronizes project information.

CHAPTER 5

Setting Project and Package Permissions

To control which individual users and groups can access, modify, and delete security enabled projects, you can set the following permissions:

- **Open**: Allows users to open remote projects from the repository. This permission is automatically selected when you select the `Modify`, `Edit Glossary`, or `Adjust Custom Properties` permissions.
- **Modify**: Allows users to make modifications to any project entity type with the exception of custom properties.
- **Delete**: Allows users to permanently delete remote projects from the repository.
- **Edit Glossary**: Allows users to edit glossary entries. This permission is automatically set by default when you set the modify permission; however, you can deselect the modify permission to limit editing to glossary entries.
- **Adjust Custom Properties**: Allows users to add, delete, and edit custom properties, and to choose whether to share custom properties of the project or a parent package. This permission is independent from the modify permission and must be explicitly set.

NOTE

All permissions applicable to projects are also applicable to project baselines.

In addition to setting permissions for projects, you can also set permissions for specific packages of a project. For more information, see Setting Permissions for a Specific Package [p. 28].

You can also set default permissions for a group. Each time you add the group to a project, the group is automatically assigned the default permissions. For more information, see Setting Default Group Permissions [p. 28].

Setting Project Permissions

1. In the left pane tree view, select the project for which to set permissions.

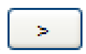
   The permission options and list of available users and groups appear in the right pane.

2. Click the **Edit Project Permissions** button  to enable editing.
3. Under **Available Users & Groups**, select the desired users and groups.

   NOTE

   You can select multiple users and groups. To select nonconsecutive users and groups, press and hold down the `[Ctrl]` key, and then click each user and group. To select consecutive users and groups, click the first user or group, press and hold down the `[Shift]` key, and then click the last user of the group.

   To search for a specific user or group, type the first few letters of the desired user or group. Any matches appear at the top of the list. Use the DOWN ARROW or UP ARROW keys to navigate through the list of matching users. This feature is also available in the attribute table of a selected user. Click on a row in the appropriate column of the table before searching through it.

4. Click the arrow button  to add the selected users or groups to the **Permissions** list.

   For specific users, all permissions are set by default. For groups, the default group permissions are set. For more information, see Setting Default Group Permissions [p. 28], and Permissions Priority Rule [p. 29].

5. Under **Permissions**, select the desired permissions.

   You can select from the following:

   - **Open**: Allows users to open remote projects from the repository. This permission is automatically selected when you select the `Modify`, `Edit Glossary`, or `Adjust Custom Properties` permissions.
   - **Modify**: Allows users to make modifications to any project entity type with the exception of custom properties.
   - **Delete**: Allows users to permanently delete remote projects from the repository.
   - **Edit Glossary**: Allows users to edit glossary entries. This permission is automatically set by default when you set the modify permission; however, you can deselect the modify permission to limit editing to glossary entries.
   - **Adjust Custom Properties**: Allows users to add, delete, and edit custom properties, and to choose whether to share custom properties of the project or a parent package. This permission is independent from the modify permission and must be explicitly set.

6. Optionally, under **Apply Permissions to All Groups & Users**, apply permissions settings to all existing users and groups by performing the following steps:

   a) Right-click a check box to enable the permission setting.

      Permissions settings are disabled by default to prevent erroneous updates to user and group permissions.

   b) Select or clear a permission setting check box.

      You can apply permissions from existing users and groups by selecting the check box. You can also remove permissions by clearing the check box.

c) Click the **Apply** button.

A message box appears. Click **Yes** to apply the permissions to all existing users and groups.

NOTE

This feature does not define the default permissions for users and groups added to the project after you have clicked the **Apply** button. A user added to a project always has all permissions set by default and groups added to a project always retain their default permissions.

7. Click **File**>**Save**.

About Setting Package Permissions

In addition to setting permissions at the project level, you can also set the following permissions for a specific package of a project:

- **Modify**: Allows users to make modifications to any aspect of the project. This includes the ability to delete a package.
- **Adjust Custom Properties**: Allows users to add, delete, and edit custom properties and the **Share Custom Properties** package setting. This permission is independent from the modify permission and must be explicitly set.

The process for adding permissions to a specific package is the same as adding permissions to a project. For more information, see Setting Permissions for a Specific Package [p. 28]. Additionally, you can choose an option to automatically add permissions to all packages whenever you add permissions to a project. For more information, see Setting Default Package Permissions [p. 27].

Setting Default Package Permissions

You can set the default package permission option to either have packages automatically inherit the permissions of the project or to display a prompt that asks you if you want to add permissions to all packages of a project.

The following steps describe how to set the default option for adding package permissions.

1. In the left tree view pane, select **Projects**.

   The **Default Package Permissions Options** appear.

2. Select an option to configure how permissions are added to packages by default.
   - **Automatically add permissions to all packages of a project**: Permissions are automatically added to all packages of a project each time you add permissions to the project. The packages of the project inherit the permissions set for the project.
   - **Prompt before adding permissions to all packages of a project**: Each time you add permissions to a project, a prompt is displayed asking you to add permissions to all packages of the project.

Setting Permissions for a Specific Package

This topic describes how to set permissions for a specific package of a security enabled project.

1. In the left pane tree view, select the package for which to set permissions.

   The list of available users and groups appear. Additionally, under **Permissions**, any global groups appear.

2. Under **Available Users & Groups**, select the desired users and groups.

   NOTE

   You can select multiple users and groups. To select nonconsecutive users and groups, press and hold down the `[Ctrl]` key, and then click each user and group. To select consecutive users and groups, click the first user or group, press and hold down the `[Shift]` key, and then click the last user of the group.

   To search for a specific user or group, type the first few letters of the desired user or group. Any matches appear at the top of the list. Use the DOWN ARROW or UP ARROW keys to navigate through the list of matching users. This feature is also available in the attribute table of a selected user. Click on a row in the appropriate column of the table before searching through it.

3. Click an arrow key to add the selected users or groups to the **Permissions** list.

   Prior to adding the user or group to the package, you must add a user or group to the project.

4. Under **Permissions**, select the desired permissions.

   You can select from the following persmissions:

   - **Modify**: Allows users to make modifications to any aspect of the project. This includes the ability to delete a package.
   - **Adjust Custom Properties**: Allows users to add, delete, and edit custom properties and the **Share Custom Properties** package setting. This permission is independent from the modify permission and must be explicitly set.

5. Click **File**>**Save**.

Setting Default Group Permissions

To automatically set permissions each time you add a group to a project, you can set the default permissions for a specific group. Setting the default group permissions eliminates the need to set permissions each time you add a group to a project. Additionally, you can define a group as a global group. Global groups are automatically added to every new project.

This topic describes how to set default group permissions and define a global group.

1. In the left pane tree view, select the group for which to set default group permissions.
2. Select the **Is this group global** box to automatically add the group to new projects.

NOTE

Selecting the global group option does not add the group to existing projects in the repository, only to new projects that are created after the group becomes a global group.

3. Under **Default permissions for this group**, select the check box of the desired permissions.

   Available permissions to set are as follows:

   - **Open**: Allows users to open remote projects from the repository. This permission is automatically selected when you select the `Modify`, `Edit Glossary`, or `Adjust Custom Properties` permissions.
   - **Modify**: Allows users to make modifications to any project entity type with the exception of custom properties.
   - **Delete**: Allows users to permanently delete remote projects from the repository.
   - **Edit Glossary**: Allows users to edit glossary entries. This permission is automatically set by default when you set the modify permission; however, you can deselect the modify permission to limit editing to glossary entries.
   - **Adjust Custom Properties**: Allows users to add, delete, and edit custom properties, and to choose whether to share custom properties of the project or a parent package. This permission is independent from the modify permission and must be explicitly set.

   Each time you add the group to a project, the default permissions for the group are automatically set.

Permissions Priority Rule

For users who are members of multiple groups that have different permissions, the priority of permissions is as follows: permissions that are set have priority over permissions that are not set. For example, if Jim has delete permission set in Group A but not in Group B, when both groups are added to a project, the delete permission set in Group A has priority. Jim will be able to delete projects.

One exception to this rule is when an individual user is added to a project. In this case, the permissions set for an individual user have priority and override any permissions set in other groups.

The following table provides examples that describe how the permissions priority rule is applied to multiple groups and users added to the same project.

Table 3. Permissions Priority Table

User	Is a Member of	User and Group Permissions	Result
Jill	QA Engineering	QA: Modify = yes Engineering: Modify = no	Jill can modify
Paul	Analysis Managers	Analysts: Open = no Managers = Open = yes	Paul can open

User	Is a Member of	User and Group Permissions	Result
Jill	QA Engineering	Jill: Modify = no QA: Modify = yes Engineering: Modify = no	Jill cannot modify
Paul	Analysis Managers	Paul: Open = no Analysts: Open = no Managers: Open = yes	Paul cannot open

NOTE

When Jill and Paul are added as individual users, their permissions have priority over the group permissions.

Index