



# Manage HQ Users and Roles

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## Table of Contents

1. Create and Manage User Accounts .....	3
1.1. Introduction to User Accounts in Hyperic .....	4
1.2. Built-in Accounts .....	5
1.3. Create a New User Account .....	6
1.4. List User Accounts .....	7
1.5. View a User Account .....	9
1.6. Modify User Account Settings .....	10
2. Create and Manage Roles in vFabric Hyperic .....	13
2.1. Understand Roles in vFabric Hyperic .....	13
2.2. Built-in Roles .....	17
2.3. Create a New Role .....	19
2.4. List Roles .....	27
2.5. View a Role .....	27
2.6. Edit a Role .....	31

# 1. Create and Manage User Accounts

*Topics marked with\* relate to features available only in vFabric Hyperic.*

## 1.1. Introduction to User Accounts in Hyperic

You create an account in Hyperic for each user.

In Hyperic HQ, a user account specifies the user's name, username, and contact information, including the email and SMS addresses for receiving alert notifications.

In vFabric Hyperic, a user account is also associated with one or more *roles*, the mechanism by which resource access and associated permissions are granted to users. Note that in vFabric Hyperic, to have access to resources, a user account must be assigned at least one role to which resources are assigned. Roles are not supported in Hyperic HQ — all users have all permissions to all resources in inventory. Similarly, any Hyperic HQ user has the permission to create other users.

For information about roles, see [Understand Roles in vFabric Hyperic](#).

## 1.2. Built-in Accounts

There is one built-in user account in Hyperic HQ, and two in vFabric Hyperic.

### 1.2.1. hqadmin Account

Both Hyperic HQ and vFabric Hyperic have a built-in hqadmin account, which has the `superuser` role, and can:

- Administer the HQ Server
- and, in vFabric Hyperic:
  - Assign alert definitions to resource types
  - Modify role-based dashboards

### 1.2.2. guest Account

vFabric Hyperic has a built-in `guest` account, which, when enabled, allows anonymous, view-only access to the HQ user interface. The `guest` user has the built-in `guest` role. Note that the `guest` role provides **View** permissions for all types, but unless resource groups are assigned to the role, anonymous users will not be able to view any resources. To allow anonymous users to view resources in HQ you must enable the `guest` account and assign the groups of resources you wish to expose to the `guest` role.

You can expose all resources to the `guest` role without assigning groups to the role. To do so, insert the following row into the database. Note that there is no user-interface that can revert this assignment and that you will have to remove the row manually from the database to disable it.

```
INSERT INTO EAM_ROLE_RESOURCE_GROUP_MAP VALUES (2, 1);
```

## 1.3. Create a New User Account

The sections below have instructions for creating a user, and in vFabric Hyperic, assigning roles to the user.

### 1.3.1. Define User Account Attributes

To create a new Hyperic user:

1. Click **New User** on the **Administration** page.
2. The **New User** page appears.

**New User**

**General Properties**

\* **Name:** First  Last

\* **Username:**

\* **Password:** Enter New Password:   
At least 6 case-sensitive characters and numbers, no spaces, or quotation marks.  
Confirm New Password:

\* **Email:**

\* **Phone:**

\* **Department:**

\* **SMS Address:**

**Format:** ☐ HTML ☒ TEXT

**Enable Login:** ☒ YES ☐ NO

3. Enter values for:

- **Name**
- **Username** — The username the user logs in with.
- **Phone**
- **Department**
- **Password** — Passwords must contain at least 6 case-sensitive characters and numbers, and no spaces or quotation marks.
- **Email** — User's email address.
- **Format** — Toggle the radio button to select HTML or plain text.
- **SMS Address** — An email-to-SMS gateway email address for the user's SMS device.
  - For a cellular phone on the Cingular network, this might look like *4155551212@mobile.mycingular.com*. Check with the service provider for details about an email-to-SMS configuration. Basic alert notification sent to this user's SSS address will be in long format, which can result in up to five separate messages on the SMS device each time notification is sent by HQ. Hyperic recommends that SMS alerting be used in conjunction with escalations, not basic alert notification, but short format is used there.
- **Enable Login** — Toggle the radio button to disable or enable the account. The user cannot log in when the login is disabled.

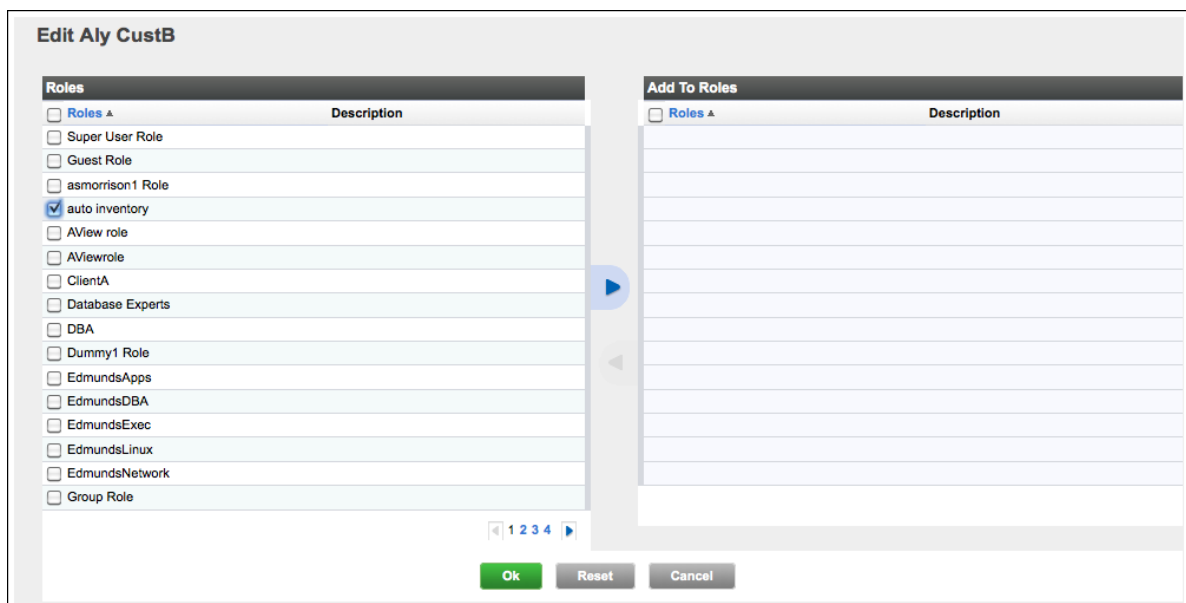
4. Click:

- **OK** in Hyperic HQ to save the new account.
- **OK and Assign to Roles** in vFabric Hyperic.

### 1.3.2. Assign Roles to a New User Account \*

In vFabric Hyperic, the roles to which a user is assigned govern which resources the user may access, and the operations the user can perform on those resources. Each role in vFabric Hyperic defines a permission matrix; users with a role may exercise the permissions it grants, on the resources in groups assigned to the role.

To assign roles to a user:



1. In the "Roles" panel on the left side of the page, checkmark each role to which you want to assign the user, and click the blue arrow to move the roles to the "Add to Roles" panel.
2. Click **OK** when you are done adding users to the role.

## 1.4. List User Accounts

1. Click **List Users** on the **Administration** page.
  - The **List Users** page appears.  
A screenshot of the **List Users** page is shown below.

List Users				
Authentication/Authorization				
Users: <a href="#">List Users</a>		Roles: <a href="#">List Roles</a>		
<a href="#">New User...</a>		<a href="#">New Role...</a>		
<input type="checkbox"/> First Name	Last Name	UserName ▲	Email	Department
<input type="checkbox"/> Guest	User	guest	hq@demo2.hyperic.net	
<input type="checkbox"/> Arie	Chapman	achapman	achapman@vmware.com	
<input type="checkbox"/> agim	agim	agim	agim@springsource.com	
<input type="checkbox"/> Alex	Ma	ama	ama@vmware.com	
<input type="checkbox"/> Al	Sargent	asargent	asargent@vmware.com	
<input type="checkbox"/> Veiw	User	AViewUser	scott.morrison@hyperic.com	
<input type="checkbox"/> Blair	Hester	bhester	bhester@hyperic.com	
<input type="checkbox"/> bruce	snyder	bsnyder	bob@bob.com	
<input type="checkbox"/> Chip	Disabled	cdisabled	chip.witt@springsource.com	
<input type="checkbox"/> chris	harris	charris	chris.harris@springsource.com	
<input type="checkbox"/> chris	prendergast	chrisp	chris.prendergast@hyperic.com	
<input type="checkbox"/> Charles	Lee	clee	charles.lee@hyperic.com	
<input type="checkbox"/> colin	Sampaleanu	colin	Colin.Sampaleanu@springsource.com	
<input type="checkbox"/> Contegix	Customer	contegix	greg.walters@contegix.com	
<input type="checkbox"/> chris	prendergast	cprendergast	Chris.Prendergast@hyperic.com	
<a href="#">NEW...</a> <a href="#">DELETE</a>		Total: 117   Items Per Page: 15 <a href="#">1</a> <a href="#">2</a> <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a> <a href="#">8</a>		

The **List Users** page lists the following information for each user account.

- **First Name**
- **Last Name**
- **UserName** — Click a user name to view and edit the user account.
- **Email** — Click an email address to send mail to the user.
- **Department**



## 1.5. View a User Account

1. List user accounts, following the instructions in [List User Accounts](#).
2. Click the **UserName** for the user account you wish to view.
  - The *UserName* page appears.

A screenshot of the user account page is shown below.

**Guest User**

**General Properties**

Name: Guest User      Username: guest  
 Email: hq@demo2.hyperic.net (TEXT)      Phone:  
 Department:  
 Enable Login: NO      SMS Address:

[EDIT...](#)

**Roles Assigned To**

Name ▲	Members	Description
<input type="checkbox"/> Guest Role	10	

[ADD TO LIST...](#) [REMOVE FROM LIST](#)      Total: 1      Items Per Page: 15 ▼

[<< Return to Users](#)

- The **General Properties** section contains this information:
  - **Name**
  - **Username** — The username the user logs in with.
  - **Phone**
  - **Department**
  - **Password** — The user's password is not displayed. If you have the permission to modify the password, a **Change...** link is present.
  - **Email** — User's email address. Click to send an email to the user.
  - **Format** — Format for email notifications sent to the user — HTML or plain text.
  - **SMS Address** — An email-to-SMS gateway email address for the user's SMS device.
  - **Enable Login** — Indicates whether or not the account is enabled. The user cannot log in when the login is disabled.
- The **Roles Assigned To** section contains:
  - A list of the roles to which the user is assigned.
  - An **Add to List** button — click it to assign additional roles to the user.

## 1.6. Modify User Account Settings

1. Navigate to the user account, as described in [View a User Account](#).

**Guest User**

**General Properties**

Name: Guest User      Username: guest  
Email: hq@demo2.hyperic.net (TEXT)      Phone:  
Enable Login: NO      Department:  
SMS Address:

[EDIT...](#)

**Roles Assigned To**

Name ^	Members	Description
<input type="checkbox"/> Guest Role	10	

[ADD TO LIST...](#) [REMOVE FROM LIST](#)      Total: 1      Items Per Page: 15

[<< Return to Users](#)

### 1.6.1. Change Password

1. Click **Change** in the password field on the *UserName* page.
- The **Change Password** page appears.

**Edit View User**

**Change Password**

★ Password: Enter New Password:

At least 8 case-sensitive characters and numbers, no spaces, or quotation marks.

Confirm New Password:

[Ok](#) [Reset](#) [Cancel](#)

2. If you do not have the SuperUser role, the page prompts you to supply the previous password.
3. Enter a password in the **Enter New Password** field.
4. Enter a password again in the **Confirm New Password** field.
5. Click **OK**.

### 1.6.2. Edit Account Settings

1. Click **Edit** in the "General Properties\*" section of the *UserName* page.
- The \*Edit *UseName* page appears.  
A screenshot of the **Edit User** page is shown below.

**Edit User**

**General Properties**

\* Name: First:  Last:

\* Username:

Phone:

Department:

SMS Address:

\* Email:

Format: ☐ HTML ☒ TEXT

Enable Login: ☐ YES ☒ NO

2. Enter values for:

- **Name**
- **Username** — The username the user logs in with.
- **Phone**
- **Department**
- **Email** — User's email address.
- **Format** — Toggle the radio button to select HTML or plain text.
- **SMS Address** — An email-to-SMS gateway email address for the user's SMS device.
  - For a cellular phone on the Cingular network, this might look like `4155551212@mobile.mycingular.com`. Check with the service provider for details about an email-to-SMS configuration. Basic alert notification sent to this user's SSS address will be in long format, which can result in up to five separate messages on the SMS device each time notification is sent by HQ. Hyperic recommends that SMS alerting be used in conjunction with [escalation](#), not basic alert notification, but short format is used there.
- **Enable Login** — Toggle the radio button to disable or enable the account. The user cannot log in when the login is disabled.

3. Click **OK**.

### 1.6.3. Update Roles Assigned to a User \*

1. Click **Add to List** in the "Roles Assigned To\*" section of the *UserName* page.

- The \*Edit *UserName* page appears.

**Edit Aly CustB**

**Roles**

Roles	Description
<input type="checkbox"/> Super User Role	
<input type="checkbox"/> Guest Role	
<input type="checkbox"/> asmorison1 Role	
<input checked="" type="checkbox"/> auto inventory	
<input type="checkbox"/> AView role	
<input type="checkbox"/> AViewrole	
<input type="checkbox"/> ClientA	
<input type="checkbox"/> Database Experts	
<input type="checkbox"/> DBA	
<input type="checkbox"/> Dummy1 Role	
<input type="checkbox"/> EdmundsApps	
<input type="checkbox"/> EdmundsDBA	
<input type="checkbox"/> EdmundsExec	
<input type="checkbox"/> EdmundsLinux	
<input type="checkbox"/> EdmundsNetwork	
<input type="checkbox"/> Group Role	

1 2 3 4

**Add To Roles**

Roles	Description
-------	-------------

OK Reset Cancel

2. In the "Roles" panel on the left side of the page, checkmark each role to which you want to assign the user, and click the blue arrow to move the roles to the "Add to Roles" panel.
3. Click **OK** when you are done adding users to the role.

## 2. Create and Manage Roles in vFabric Hyperic

Available only in **vFabric Hyperic**

### 2.1. Understand Roles in vFabric Hyperic

In vFabric Hyperic, every user is assigned one or more roles. Roles enable:

- **Access control** - A role defines what resources the users added to the role - *role users* - can access, and the types of operations - view, edit, create, and so on - they can perform on those resources.
- **Alert notification** - A role with users but no resource groups assigned to it can serve simply as a distribution list for alert notifications. Role-based notification makes it easier to maintain alert definitions, and enables shift-based alert notifications. For around-the-clock operations, you can define multiple roles, with complementary alert calendars that specify when role users are on duty. If you assign the several complementary roles as recipients for the same alert, when the alert fires, HQ will send notifications only to the role with currently active calendar.
- **Role-Specific Dashboards** - When you create a role, HQ creates a new Dashboard for the role, which you can customize to meet the needs of role users.

The sections below describe the information you define for a role in vFabric Hyperic.

#### 2.1.1. Permission Matrix: Grants Access to Resource Types

The permission matrix for a role defines the level of access that role users have to configurable items in vFabric Hyperic. There are several types of targets to which you can define a permission level:

- User management types - The permission levels to **Users** and **Roles** determines what level of access, if any, role users have to view and manage HQ user accounts and HQ roles.
- Inventory resource types - The permission level to inventory types - **Platforms, Servers, Services, Groups, and Applications** - controls the level of access, if any, role users have to that inventory type. **Note:** Granting access to an inventory type does *not* grant access to specific resource instances.
- Escalations - The permission level for **Escalations** controls the level of access, if any, role users have to view or manage escalations defined for use in alert definitions.

The screenshot below shows the permission matrix you define for a role.

Permissions		
Resource Type	Permissions	Capabilities
Users	Full	
Roles	Full	
Groups *	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/>
Platforms	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Servers	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Services	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Applications	Full	
Escalations	Full	

*\* Regardless of permissions selected, all users have the ability to create groups in the system.*

Ok Reset Cancel

Assign Users & Groups to this Role after clicking "OK".

## About Permission Levels

You assign one of the following permission levels to each type.

- **None** - No access at all to instances of the type.
- **Read-Only** - Allows role users to view instances of the type, but not create, edit, or delete them. For **Platforms**, **Servers**, **Services**, **Groups**, also enables:

- **Read-Only** access to alert definitions for the inventory type.

A role with **Read-Only** permission level does **not** have permissions to enable/disable/fix/ack alerts or control resources - these capabilities must be explicitly granted.

- **Read-Write** - Allows role users to view and edit instances of the type, but not create or delete them. For **Platforms**, **Servers**, **Services**, **Groups**, also gives:

- **Full** access to alert definitions for the inventory type,
- Permission to manage alerts (enable/disable, fix, acknowledge) for the inventory type.
- Permission to perform supported control operations on resources of the inventory type.

- **Full** - Allows role users to create, edit, delete, and view instance of the type. For **Platforms**, **Servers**, **Services**, **Groups**, also gives:

- **Full** access to alert definitions for the inventory type.
- Permission to manage alerts (enable/disable, fix, acknowledge) for the inventory type.
- Permission to perform supported control operations on resources of the inventory type.

## Permission Tips

### Defining a Role's Permission Matrix

For roles that:

- **Add resources to inventory and create alert definitions** - use **Full** or **Read-Write** permission levels. These permission levels enable a role to also process fired alerts and control resources.
- **Monitor resources, respond to alerts and control resources** - use the **Read** permission level, and then grant **Fix/Ack** and **Control** capability, or both. This allows operations staff to respond to alerts, see the details of alert definitions, and perform routine or as-needed resource control tasks but **not** create/modify/delete resources and alert definitions.
- **Need visibility only** - Use **Read** permission level for roles that view and monitor resources, but do not (1) create/modify/delete resources and alert definitions, or (2) response to alerts.

## How HQ Validates Platform-Server-Service Permission Level Assignments

HQ Enterprise does a bottom-up validation of the permission levels a role grants to Platforms, Servers, and Services.

A role with **Full** access (which enables resource deletion) to an inventory type must have at least **Read-Only** access to the parent type (if there is one) and Full to the child type (if there is one).

For example, **Full** access to Servers requires at least Read access to Platforms and Full access to Services.

### 2.1.2. Groups: Grant Access to Specific Resources

In addition to defining a permission matrix for a role, you assign one or more resource groups to the role. Together, the permission levels and groups defined in the role determine the *specific* inventory resources that role users can work with.

If you create a role simply for use in role-based alert notifications, you do not have to assign any resource groups to the role.

Permission levels to **Platforms**, **Servers**, **Services**, **Groups**, and **Applications** define the level of access role users have to each of those inventory *types*. The operations that a role enables for an inventory type apply *only* to resources that belong to a group assigned to the role. (You cannot assign individual resources to a role, you must create groups of resources, and assign groups to roles.)

For example, the **Full** permission to **Platforms** granted by a role may only be exercised on platforms that belong to a group assigned to the role. So, a group assigned to a role may well contain resource types to which the role does not grant access.

You can assign the same resource group to multiple roles, and you can assign the same user to multiple roles. This allows for the fact that different users may need different levels of access to the same resources. For instance, you can create one role for users that need **Read-Only** access to the members of a resource group, and another for users that need **Full** permission, and assign the same resource groups to both roles.

### 2.1.3. Alert Calendar: Enable Shift-Based Notifications

An Alert Calendar is an optional component of a role that builds on the notion of role-based notification. In role-based alert notifications, the notification recipient is a role - notifications are sent to all users with the role. An

Alert Calendar for role defines the time periods during a work week that role users are on duty. You can define multiple roles to span the week - each with a different availability calendar, and assign all of the complementary roles as the notification recipients. In this case, HQ Server will send alert notifications only to the role that is currently on-duty, based on the alert calendars defined in the roles.

The screenshot below shows the alert calendar you can define for a role.

Alert Calendar					
<input checked="" type="checkbox"/> Monday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Tuesday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Wednesday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Thursday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Friday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Saturday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Sunday	From:	12 AM	To:	12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input type="button" value="Save"/>					



## 2.2. Built-in Roles

vFabric Hyperic has two built-in roles, which are described in the sections below.

### 2.2.1. SuperUser

The screenshot below is the permission matrix for the HQ SuperUser. The built-in hqadmin account has the SuperUser role.

**HYPERIC HQE**  
ENTERPRISE EDITION

Recent Alerts: (There have been no alerts in the last 2 hours.) Welcome, HQ Sign Out Screenshots Help

Dashboard Resources Analyze Administration Search

### Super User Role

[<< Return to Roles](#)

**Properties**

**Name:** Super User Role **Owner:** System User (admin)

**Description:** **Administer HQ Server:** YES **Configuration:**

**Dashboard Name:** Super User Role Role Dashboard

**Permissions**

Resource Type	Permissions	Capabilities
Users	Full	
Roles	Full	
Groups	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/>
Platforms	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Servers	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Services	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Applications	Full	Can Control? <input checked="" type="checkbox"/>
Escalations	Full	

**Assigned Users**

First Name	Last Name	Username
HQ	Administrator	hqadmin

[ADD TO LIST...](#) [REMOVE FROM LIST](#) Total: 1 Items Per Page: 15

**Alert Calendar**

Day	From	To	Except	From	To
<input checked="" type="checkbox"/> Monday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Tuesday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Wednesday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Thursday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Friday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Saturday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM
<input checked="" type="checkbox"/> Sunday	12 AM	12 AM	<input type="checkbox"/> Except	1 AM	2 AM

[Save](#)

[<< Return to Roles](#)

03/24/2010 01:59 PM mmcgarry About HQ Version 4.3.0-EE (build #1386 - Mar 23, 2010 - Release Build) © 2004-2010 Hyperic, Inc. [www.hyperic.com](http://www.hyperic.com)

## 2.2.2. Guest Role

The screenshot below is the permission matrix for the HQ SuperUser. The built-in guest account has the Guest role.

The screenshot displays the Hyperic HQ Enterprise Edition web interface. The top navigation bar includes the logo, a recent alerts status, user information, and navigation tabs. The main content area is titled "Guest Role" and contains sections for properties, permissions, and assigned users.

**Properties**

- Name: Guest Role
- Owner: System User (admin)
- Description: Administer HQ Server YES
- Configuration: Dashboard Name: Guest Role Role Dashboard

**Permissions**

Resource Type	Permissions	Capabilities
Users	Read Only	
Roles	Read Only	
Groups	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/>
Platforms	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Servers	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Services	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Applications	Read Only	Can Control? <input type="checkbox"/>
Escalations	None	

**Assigned Users**

<input type="checkbox"/> First Name	Last Name	Username ▲
<input type="checkbox"/> Guest	User	guest

Buttons: ADD TO LIST... REMOVE FROM LIST

Total: 1 Items Per Page: 15

## 2.3. Create a New Role

The sections below provide instructions for creating and editing roles.

### 2.3.1. Define Role Permission Matrix

In this step you create a permissions matrix for the role.

**Note:** If you are creating a role purely for the purpose of role-based alert notification, skip to [Assign Users to the Role](#).

#### Learn About Roles

- For an introduction to roles in vFabric Hyperic, see [Understanding Roles in HQ Enterprise](#).
- For information about permission levels, see [About Permission Levels](#).

1. Click **New Role** on the **Administration** page.

**New Role**

**Properties**

★ Name:

Description:

Please limit the description to 100 characters

Dashboard Name: New Role Dashboard

Owner: Marie McGarry (marie)

**Permissions**

Resource Type	Permissions	Capabilities
Users	Full	
Roles	Full	
Groups *	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/>
Platforms	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Servers	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Services	Full	Can Fix/Ack Alerts? <input checked="" type="checkbox"/> Can Control? <input checked="" type="checkbox"/>
Applications	Full	
Escalations	Full	

\* Regardless of permissions selected, all users have the ability to create groups in the system.

Ok Reset Cancel

Assign Users & Groups to this Role after clicking "OK".

2. In the "Properties" section of the **New Role** page, enter:

- **Name**
- **Description**, if desired.

3. In the **Permissions** section, select a permission level - **Full**, **Read-Write**, **Read-Only**, or **None** for each type:

- a. **Users**

- Grant **Full** to enable role users to create and delete HQ user accounts.
- Grant **Read-Write** to enable role users to edit HQ users accounts.

b. **Roles**

- If you select **Full**, which enables role users to create roles, HQ will ensure that the role's permission level to Users and Groups is at least **Read-Only**, because to create a role, you need to view users and groups.

c. **Groups**

- Grant **Full** to enable role users to delete groups created by others.
- Grant **Read-Write** to enable role users to modify groups created by others.
- Note that regardless of the permission level you select, any user can create groups, and as the owner of such groups, delete them.

d. **Platforms**

- If you select **Full**, which enables role users to delete platforms and their child resources, HQ will require that the role's permission level to Servers and Services is also **Full**.
- If you select **Full** or **Read-Write**, HQ will automatically checkmark the **Can Fix/Ack Alerts?** and **Can Control?** capabilities.
- If you select **Read-Only**, you have the option to grant alert management or resource control capabilities by clicking **Can Fix/Ack Alerts?** or **Can Control?** respectively.
- If you select **None**, you cannot grant alert management or resource control permissions.

e. **Servers**

- If you select **Full**, which enables role users to delete servers and child services, HQ will require that the role's permission level to Platforms is at least **Read-Write**, and its permission level to Services is **Full**.
- If you select **Full** or **Read-Write**, HQ will automatically checkmark the **Can Fix/Ack Alerts?** and **Can Control?** capabilities.
- If you select **Read-Only**, you have the option to grant alert management or resource control capabilities by clicking **Can Fix/Ack Alerts?** or **Can Control?** respectively.
- If you select **None**, you cannot grant alert management or resource control permissions.

f. **Services**

- If you select **Full**, HQ will require that the role's permission level to Servers is at least **Read-Write**.
- Grant at least **Read-Only** if you are going to grant the role **Full** permission to **Applications**.
- If you select **Full** or **Read-Write**, HQ will automatically checkmark the **Can Fix/Ack Alerts?** and **Can Control?** capabilities.
- If you select **Read-Only**, you have the option to grant alert management or resource control capabilities by clicking **Can Fix/Ack Alerts?** or **Can Control?** respectively.

- If you select **None**, you cannot grant alert management or resource control permissions.

g. **Applications**

- Grant **Full** if you want role users to be able to create and delete applications.
- Grant **Read-Write** if you want role users to be able to modify change applications created by others.

h. **Escalations**

- Grant **Full** if you want role users to be able to create and delete escalations groups
- Grant **Read-Write** if you want role users to be able to modify escalations.

- i. The role is saved, and the refreshed role page will have three new sections: "Assigned Users", "Assigned Groups", and "Alert Calendar".

Proceed to [Assign Users to a Role](#).

## 2.3.2. Assign Users to a Role

In vFabric Hyperic, each user you assign to a role can exercise the permissions defined for the role, on resources in the groups assigned to the role.

1. If you are not currently viewing the role to which you wish to assign users, navigate to the role.

### Guest Role

[<< Return to Roles](#)

**Properties**

**\* Name:** Guest Role

**Description:**

**Dashboard Name:** Guest Role Role Dashboard

**Owner:** System User (admin)

**Administer HQ Server:** YES

**Configuration:**

**Permissions**

Resource Type	Permissions	Capabilities
Users	Read Only	
Roles	Read Only	
Groups *	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/>
Platforms	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Servers	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Services	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Applications	Read Only	
Escalations	Read Only	

\* Regardless of permissions selected, all users have the ability to create groups in the system.

[EDIT...](#)

**Assigned Users**

<input type="checkbox"/> First Name	Last Name	Username ^
<input type="checkbox"/> Guest	User	guest
<input type="checkbox"/> Don	Baron	donbaron
<input type="checkbox"/> Guest	guest	guest2
<input type="checkbox"/> Helena	Edelson	holly
<input type="checkbox"/> HQ	Demo	hqdemo
<input type="checkbox"/> Kenji	Igarashi	kigarash
<input type="checkbox"/> Robert	Ide	ride
<input type="checkbox"/> Sales	Group	sales
<input type="checkbox"/> Michael	Wood	woodm
<input type="checkbox"/> Yen-Ju	Chen	ychen

[ADD TO LIST...](#) [REMOVE FROM LIST](#) Total: 10 Items Per Page: 15

**Assigned Groups**

<input type="checkbox"/> Group ^	Description
<input type="checkbox"/> All Platforms	
<input type="checkbox"/> All Server Group	
<input type="checkbox"/> All Services Group	
<input type="checkbox"/> Linux Group of 10	
<input type="checkbox"/> My SQL Servers	
<input type="checkbox"/> vm group	

[ADD TO LIST...](#) [REMOVE FROM LIST](#) Total: 6 Items Per Page: 15

**Alert Calendar**

<input checked="" type="checkbox"/> Monday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Tuesday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Wednesday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Thursday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Friday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Saturday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Sunday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM

[Save](#)

[<< Return to Roles](#)

2. Click **Add to List** in the "Assigned Users" section of the page.

- The **Assign Users to Role** page appears.

**Edit auto inventory: Assign Users to Role**

Users			Assign To Role		
<input type="checkbox"/> First Name	Last Name	Username ▲	<input type="checkbox"/> First Name	Last Name	Username ▲
<input type="checkbox"/> Guest	User	guest			
<input type="checkbox"/> Arie	Chapman	achapman			
<input type="checkbox"/> agim	agim	agim			
<input type="checkbox"/> Alex	Ma	ama			
<input type="checkbox"/> Al	Sargent	asargent			
<input checked="" type="checkbox"/> Volw	User	AViewUser			
<input type="checkbox"/> Blair	Hester	bhester			
<input type="checkbox"/> bruce	snyder	bsnyder			
<input type="checkbox"/> Chip	Disabled	cdisabled			
<input type="checkbox"/> chris	harris	charris			
<input type="checkbox"/> chris	prendergast	chrisp			
<input type="checkbox"/> Charles	Lee	clee			
<input type="checkbox"/> colin	Sampaleanu	colin			
<input type="checkbox"/> Contegix	Customer	contegix			
<input type="checkbox"/> chris	prendergast	cprendergast			

1 2 3 4 5 6 7 8

Ok Reset Cancel

3. On the "Users" panel on the left side page, checkmark each HQ user you wish to add to the role, and click the blue arrow to move the users to the "Assign To Role" panel.

4. Click **OK** when you are done adding users to the role.

If you are creating a role purely for the purpose of role-based alert notification, skip to [Define Alert Calendar for Role](#). Otherwise proceed to [Assign Groups to the Role](#).

### 2.3.3. Assign Groups to a Role

In vFabric Hyperic, the groups of resources you assign to a role constitute the population of resources to which users with that role may exercise the permissions associated with the role. (For example, if the role's permission level to Platforms is **None**, role users will not have access to platforms in groups assigned to the role.

1. If you are not currently viewing the role to which you wish to assign groups, navigate to the role.

### Guest Role

[<< Return to Roles](#)

**Properties**

**\* Name:** Guest Role

**Description:**

**Dashboard Name:** Guest Role Role Dashboard

**Owner:** System User (admin)

**Administer HQ Server:** YES

**Configuration:**

**Permissions**

Resource Type	Permissions	Capabilities
Users	Read Only	
Roles	Read Only	
Groups *	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/>
Platforms	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Servers	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Services	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Applications	Read Only	
Escalations	Read Only	

\* Regardless of permissions selected, all users have the ability to create groups in the system.

[EDIT...](#)

**Assigned Users**

<input type="checkbox"/> First Name	Last Name	Username ^
<input type="checkbox"/> Guest	User	guest
<input type="checkbox"/> Don	Baron	donbaron
<input type="checkbox"/> Guest	guest	guest2
<input type="checkbox"/> Helena	Edelson	holly
<input type="checkbox"/> HQ	Demo	hqdemo
<input type="checkbox"/> Kenji	Igarashi	kigarash
<input type="checkbox"/> Robert	Ide	ride
<input type="checkbox"/> Sales	Group	sales
<input type="checkbox"/> Michael	Wood	woodm
<input type="checkbox"/> Yen-Ju	Chen	ychen

[ADD TO LIST...](#) [REMOVE FROM LIST](#) Total: 10 Items Per Page: 15

**Assigned Groups**

<input type="checkbox"/> Group ^	Description
<input type="checkbox"/> All Platforms	
<input type="checkbox"/> All Server Group	
<input type="checkbox"/> All Services Group	
<input type="checkbox"/> Linux Group of 10	
<input type="checkbox"/> My SQL Servers	
<input type="checkbox"/> vm group	

[ADD TO LIST...](#) [REMOVE FROM LIST](#) Total: 6 Items Per Page: 15

**Alert Calendar**

<input checked="" type="checkbox"/> Monday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Tuesday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Wednesday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Thursday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Friday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Saturday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM
<input checked="" type="checkbox"/> Sunday	From: 12 AM To: 12 AM	<input type="checkbox"/> Except From: 1 AM To: 2 AM

[Save](#)

[<< Return to Roles](#)

2. Click **Add to List** in the "Assigned Groups" section.

- The **Assign Groups to Role** page appears.



**Edit auto inventory: Assign Groups to Role**

Group	Description
<input type="checkbox"/> Group	
<input type="checkbox"/> AACPUGRP	
<input type="checkbox"/> All Weblogic Instances	this all the WLS for VMWARE
<input type="checkbox"/> apple groups	
<input checked="" type="checkbox"/> Applications Group Test	Trying to see how application groups work
<input type="checkbox"/> carwin	
<input type="checkbox"/> demo	
<input type="checkbox"/> Demo Group	
<input type="checkbox"/> Dummy Filesystem Group	
<input type="checkbox"/> edmunds testing - apache	
<input type="checkbox"/> edmunds testing - linux	
<input type="checkbox"/> esx	
<input type="checkbox"/> FileServer Downtime Test	
<input type="checkbox"/> FileServer Mounts	
<input type="checkbox"/> Group of Groups	
<input type="checkbox"/> Hugh TCServer	

1 2 3 4 5 6 7 8 9 10

Ok Reset Cancel

- On the "Groups" panel on the left side of the page, checkmark each resource group you wish to add to the role, and click the blue arrow to move the groups to the "Assign To Role" panel.
- Click **OK** when you are done adding groups to the role.

Proceed to [Define Alert Calendar](#), as desired.

## 2.3.4. Define Alert Calendar for Follow-the-Sun Role-Based Notifications

An alert calendar defines the availability calendar during which role users are available for alert notifications. You should define an alert calendar if:

- You are creating a role that will be a recipient of alert notifications, and
- The users assigned to the role users are available only during specific intervals only.

By default, a role's alert calendar settings specify that role users are available for notifications 24 hours a day, 7 days a week, with no exceptions. To define a narrower availability calendar:

- For each day in the week,
  - Use the first set of **From** and **To** pull-downs to specify a start time and an end time that role users are availability for notifications.
  - If there is a period of time within the availability period specified in the previous step, during which role users should *not* receive notifications, click **Except**, and use the **From** and **To** pull-downs on the right to specify that period of time.
- Click **Save** after defining the alert calendar.

You must define additional role or roles with complementary alert calendars to ensure that there is a role whose users are available during periods of time that the current role's alert calendar does not include.

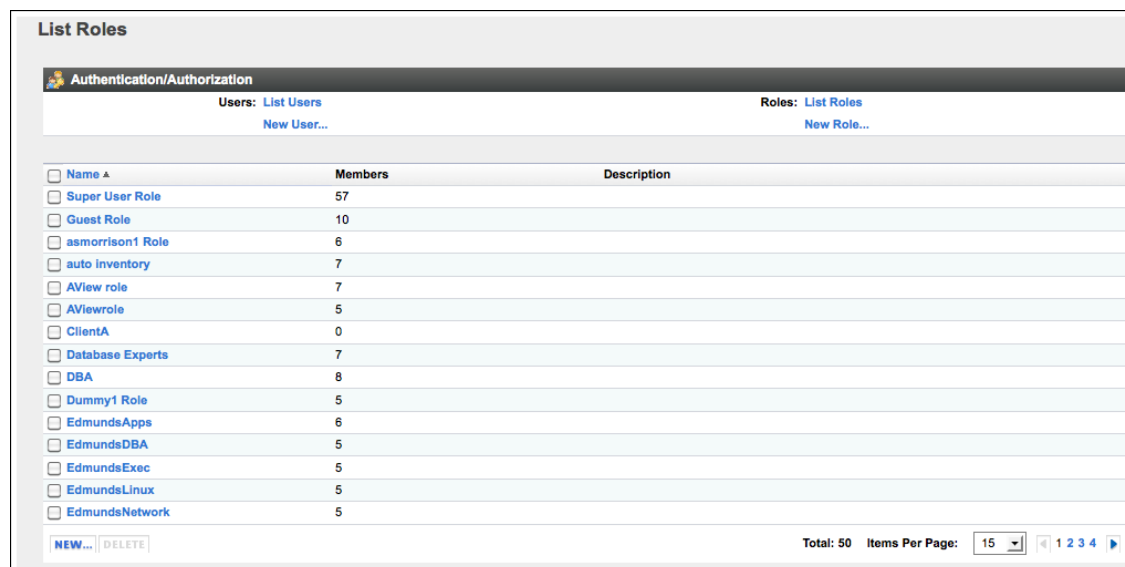
## 2.3.5. Customize Role-Specific Dashboard

When you create a role, vFabric Hyperic creates a Dashboard with the same name as the role, which is HQ users that have been added to the role can select from the **Select a Dashboard** pull-down in the upper left corner of the HQ Dashboard.

As desired, you can add, remove, or reconfigure the portlets on the role dashboard to meet the needs of role users. For more information see "Role-Based Dashboards in vFabric Hyperic".

## 2.4. List Roles

1. Click **List Roles** on the **Administration** page.
    - The **List Roles** page appears.
- A screenshot of the **List Roles** page is shown below.



<input type="checkbox"/> Name ▲	Members	Description
<input type="checkbox"/> Super User Role	57	
<input type="checkbox"/> Guest Role	10	
<input type="checkbox"/> asmorrison1 Role	6	
<input type="checkbox"/> auto inventory	7	
<input type="checkbox"/> AView role	7	
<input type="checkbox"/> AViewrole	5	
<input type="checkbox"/> ClientA	0	
<input type="checkbox"/> Database Experts	7	
<input type="checkbox"/> DBA	8	
<input type="checkbox"/> Dummy1 Role	5	
<input type="checkbox"/> EdmundsApps	6	
<input type="checkbox"/> EdmundsDBA	5	
<input type="checkbox"/> EdmundsExec	5	
<input type="checkbox"/> EdmundsLinux	5	
<input type="checkbox"/> EdmundsNetwork	5	

NEW... DELETE

Total: 50 Items Per Page: 15 1 2 3 4

The **List Roles** page lists the following information for each role.

- **Name** — Click a role name to view and edit the role.
- **Number of Members**
- **Description**

## 2.5. View a Role

1. List roles, following the instructions in [List Roles](#).
2. Click the name of role you wish to view.

A screenshot of the *RoleName* page is shown below.

**Guest Role**  
[<< Return to Roles](#)

**Properties**

**\* Name:** Guest Role

**Description:**

**Dashboard Name:** Guest Role Role Dashboard

**Owner:** System User (admin)

**Administer HQ Server Configuration:** YES

**Permissions**

Resource Type	Permissions	Capabilities
Users	Read Only	
Roles	Read Only	
Groups *	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/>
Platforms	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Servers	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Services	Read Only	Can Fix/Ack Alerts? <input type="checkbox"/> Can Control? <input type="checkbox"/>
Applications	Read Only	
Escalations	Read Only	

\* Regardless of permissions selected, all users have the ability to create groups in the system.

[EDIT...](#)

**Assigned Users**

<input type="checkbox"/> First Name	Last Name	Username <sup>▲</sup>
<input type="checkbox"/> Guest	User	guest
<input type="checkbox"/> Don	Baron	donbaron
<input type="checkbox"/> Guest	guest	guest2
<input type="checkbox"/> Helena	Edelson	holly
<input type="checkbox"/> HQ	Demo	hqdemo
<input type="checkbox"/> Kenji	Igarashi	kigarash
<input type="checkbox"/> Robert	Ide	ride
<input type="checkbox"/> Sales	Group	sales
<input type="checkbox"/> Michael	Wood	woodm
<input type="checkbox"/> Yen-Ju	Chen	ychen

[ADD TO LIST...](#) [REMOVE FROM LIST](#)

Total: 10 Items Per Page: 15

**Assigned Groups**

<input type="checkbox"/> Group <sup>▲</sup>	Description
<input type="checkbox"/> All Platforms	
<input type="checkbox"/> All Server Group	
<input type="checkbox"/> All Services Group	
<input type="checkbox"/> Linux Group of 10	
<input type="checkbox"/> My SQL Servers	
<input type="checkbox"/> vm group	

[ADD TO LIST...](#) [REMOVE FROM LIST](#)

Total: 6 Items Per Page: 15

**Alert Calendar**

<input checked="" type="checkbox"/> Monday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Tuesday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Wednesday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Thursday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Friday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Saturday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>
<input checked="" type="checkbox"/> Sunday	From: 12 AM <input type="text"/>	To: 12 AM <input type="text"/>	<input type="checkbox"/> Except	From: 1 AM <input type="text"/>	To: 2 AM <input type="text"/>

[Save](#)

[<< Return to Roles](#)

## 2.5.1. Properties Section

The **Properties** section contains this information:

- **Name**
- **Owner** — The user that created the role.
- **Description**
- **Administer HQ Server Configuration**
- **Dashboard Name**

## 2.5.2. Permissions Section

The **Permissions** section displays the permission matrix for the role.

- **None** - No access at all to instances of the type.
- **Read-Only** - Allows role users to view instances of the type, but not create, edit, or delete them. For **Platforms, Servers, Services, Groups**, also enables:
  - **Read-Only** access to alert definitions for the inventory type.

A role with **Read-Only** permission level does **not** have permissions to enable/disable/fix/ack alerts or control resources - these capabilities must be explicitly granted.

- **Read-Write** - Allows role users to view and edit instances of the type, but not create or delete them. For **Platforms, Servers, Services, Groups**, also gives:
  - **Full** access to alert definitions for the inventory type,
  - Permission to manage alerts (enable/disable, fix, acknowledge) for the inventory type.
  - Permission to perform supported control operations on resources of the inventory type.
- **Full** - Allows role users to create, edit, delete, and view instance of the type. For **Platforms, Servers, Services, Groups**, also gives:
  - **Full** access to alert definitions for the inventory type.
  - Permission to manage alerts (enable/disable, fix, acknowledge) for the inventory type.
  - Permission to perform supported control operations on resources of the inventory type. Click **Edit** to modify the permission matrix.

## 2.5.3. Assigned Users

The **Assigned User** section lists the following information for each user assigned to the role:

- **First Name**
- **Last Name**
- **UserName** — Click to view the user.

Click **Add to List** to add users to the role.

## 2.5.4. Assigned Groups

The **Assigned Groups** section lists the following information for each group assigned to the role:

- **Group** — The name of the group. Click to view the group.
- **Description**

Click **Add to List** to add users to the role.

## 2.5.5. Alert Calendar

The **Alert Calendar** section defines the availability calendar during which role users are available for alert notifications.

Custom alerts calendars enable "follow the sun" alert notifications. To implement a follow the sun notification strategy, you create multiple roles with complementary alert calendars. You assign a user to the role whose alert calendar matches the user's availability.

By default, a role's alert calendar settings specify that role users are available for notifications 24 hours a day, 7 days a week, with no exceptions.

To define an availability calendar for a role:

1. For each day in the week,
  - a. Use the first set of **From** and **To** pull-downs to specify a start time and an end time that role users are availability for notifications.
  - b. If there is a period of time within the availability period specified in the previous step, during which role users should *not* receive notifications, click **Except**, and use the **From** and **To** pull-downs on the right to specify that period of time.
2. Click **Save** after defining the alert calendar.

You must define additional role or roles with complementary alert calendars to ensure that there is a role whose users are available during periods of time that the current role's alert calendar does not include.

## 2.6. Edit a Role

1. List roles, following the instructions in [List Roles](#).
2. Click the name of role you wish to edit.
3. To make changes to:
  - Role permissions — Click **Edit** in the **Permissions** section of the page. See [Define Role Permission Matrix](#) for instructions.
  - Which users are assigned to the role — Click **Edit** in the **Assigned Users** section of the page. See [Assign Users to a Role](#) for instructions.
  - The alert calendar for role — Follow the instructions in [Define Alert Calendar for Follow-the-Sun Role-Based Notifications](#).