Exercise 4 - How to use Permission Schemes

Introduction

This is the fourth exercise of the Basic Level. The main goal of this exercise is to give you an idea of how to set up and manage Xporter for Jira Permission Schemes.

Permission schemes enable administrators to define which Projects, Issue Types, User Roles, and Groups will be allowed to use Xporter for Jira, as well as manage the templates used on each of those available Issue Types.

> ⓘ For more information, please check our documentation here.

In order to perform the initial setup, navigate to **Permission Schemes** on the Xporter for Jira administration section Apps page of the Jira Administration. You'll see a warning informing you *There are no Xporter for Jira Permissions Schemes* configured, a *+ Add* button and an empty grid below it. Once a Permission Scheme is configured, it will be displayed on that grid.

Right now, the only option available to you is the **+ Add button**, that will display a pop-over dialog where you'll input your Permission Scheme Name and Description;

> ⓘ In order to perform this exercise properly, please create a **Basic software development** Project on your Jira instance, and name it as **Academy.**
>
> Install at least 2 templates.
>
> Create a New Jira user named **Arthur** and let it be associated only with the j**ira-software-users** Group (it will be by default).
>
> After that, on the sidebar of *Jira Administration -> System*, under *Security*, access **Project roles** and add a Project Role named **King**.
>
> Finally, go to the project *Academy -> Project settings.* On the sidebar, access **Users and roles**. Select *Add users to a role*, and on the dialog, add the user **Arthur** to the role **King**.
>
> After all that is done, create a Bug issue, a Task issue and an Improvement issue for your Project.

1) Adding a Permission Scheme entry

On the **Permission Schemes** on the Xporter for Jira administration section Apps page of the Jira Administration, click **+ Add button** and fill in the Name and Description of your Permission Scheme. Name it **Academy** and click **Create.** A *Success!* message will be displayed informing you that the Permission Scheme was successfully added.

It will be displayed with an entry on the *Xporter for Jira Permission Schemes* grid.

⚠ If the Permission Scheme name is already in use, an *Error!* message will be displayed when you click **Create** to inform you of that conflict.

2) Editing a Permission Scheme entry

On your newly created Permission Scheme entry, click **Edit** on the Operations column, and a pop-over dialog will be displayed.

Enter a Description of your Permission and click **Update**. Your Permission Scheme entry will have its newly edited description displayed as well.

ⓘ When editing, you can change the Name and Description of your Permission Scheme.

3) Configuring the Permissions of a Permission Scheme entry

On your created Permission Scheme entry, click **Permissions** on the Operations column. You will be redirected to the **Permissions** page, where you can define the permissions of the Permission Scheme.

PERMISSIONS ACTIVE *APPLIED IN* 1 PROJECT

Permissions

Issue Types allowed to be exported (Assign)	Roles allowed to use Xporter (Assign)	Groups allowed to use Xporter (Assign)
⬆ Improvement × ☑ Task × ⏹ Bug ×	👤 King ×	⚠ No Groups assigned for this Permission Scheme

Global Template Mapping

Templates	Operations
	Assign Templates

Mapping of Issue Types to Templates

Issues	Templates	Operations
⬆ Improvement	Issue Details with Cover Page (IssueDetailsWithCover.docx) ×	Assign Templates
☑ Task	Issue QR Code (IssueQRCode.docx) ×	Assign Templates
⏹ Bug	Sprint Report (Excel) (Sprint Report.xlsx) ×	Assign Templates

Here, you can define the:

- **Issue Types** that are allowed to be exported;
- **Roles** that are allowed to use Xporter for Jira;
- **Groups** that allowed to use Xporter for Jira.

You can also

- map issue types into corresponding templates, so that for specific issue types, only specific templates will be available.

a. Defining the Issue Types that are allowed to be exported

Click the Assign on *Issue Types allowed to be exported* and on the pop-over dialog, pick only **Bug**, **Improvement** and **Task** and click **Assign**. The previous warning *No Issue Types assigned for this Permission Scheme* will now be replaced with your choices.

Permissions

Issue Types allowed to be exported (Assign)

⬆ Improvement ×
☑ Task ×
⏹ Bug ×

Click the **X** next to **Improvement** and it will be removed.

b. Defining the Roles allowed to use Xporter for Jira

Click **Assign** on *Roles allowed to use Xporter for Jira* and on the pop-over dialog, pick the select box next to *Roles* on the top of the list. All listed roles will be selected. Click **Assign**. The previous warning *No Roles assigned for this Permission Scheme* will now be replaced with your choices.

Roles allowed to use Xporter (Assign)

👤 King ×

Click X next to all the listed items except **King**.

c. Defining the Groups allowed to use Xporter for Jira

Groups allowed to use Xporter for JIRA (Assign)

⚠ No Groups assigned for this Permission Scheme

Now, click the Assign on *Groups allowed to use Xporter for Jira* and on the pop-over dialog, don't select any of the options. Click **Assign**. The warning *No Roles assigned for this Permission Scheme* will still be displayed since no option was selected.

d. Mapping of Issue Types to Templates

A *Warning* message will be displayed informing the *permission scheme does not have associations between issue types and templates* and as consequence, Xporter for Jira will be unusable with the permission scheme.

Mapping of Issue Types to Templates

Issues	Templates	Operations
⬆ Improvement	Issue Details with Cover Page (IssueDetailsWithCover.docx) ×	Assign Templates
☑ Task	Issue Details with QR Code (IssueQRCode.docx) ×	Assign Templates
⬛ Bug	Sprint Report (Excel) (Sprint Report.xlsx) ×	Assign Templates

We'll correct this by clicking **Assign Templates** on each issue type entry, and select a <u>different</u> template to assign to each Issue Type on the pop-over dialog.

⚠ Even though all templates will be available to be assigned on Issue Types, their **Scope** settings are still respected. Therefore, if you assign a template with only an **Active Scope** to *Single Export*, you won't be able to Bulk Export with it.

4) Associating a Project with a Permission Scheme

Back on the **Permission Schemes** on the Xporter for Jira administration section Apps page of the Jira Administration, on our created Permission Scheme entry, click **Projects** on the Operations column, and a pop-over dialog will be displayed.

Assign Projects

	Projects
☐	Academy
☐	Solo

Assign Cancel

On the pop-over dialog, pick the select box next to *Projects* on the top of the list - all listed Projects will be selected. Click **Assign**. A *Success!* message will be displayed and all Projects will now be listed under the column **Projects** of our created Permission Scheme entry.

If you click the **Projects** button on the Operations column again, a *Warning!* message will be displayed informing you that *There are no projects to select*.

Now, under the column **Projects** of our created Permission Scheme entry, click the **X** next to each listed project, except for **Academy**.

5) Copying a Permission Scheme

On our created Permission Scheme entry, click **Copy** on the Operations column. A Success! message will be displayed, along with a new entry that will be listed, named **Academy (Copy)**.

ⓘ

ⓘ   Only the name, description and permissions are copied.

6) Deleting a Permission Scheme

On the **Academy (Copy)** Permission Scheme entry, click **Delete** on the Operations column, and a prompt dialog will be displayed asking if you're sure about deleting the Permission Scheme. Click **Confirm** and that entry will be removed.

The Exercise(s)

7) Enabling Permission Schemes configurations

With all the Permission Schemes setup done, navigate to the **Global Settings** on the Xporter for Jira administration section Apps page of the Jira Administration, and on *Enable Xporter for Jira for all projects and all users* under *Global Permissions,* tick **Off** and click **Save**.

Also, make sure the *Enable Xporter for Jira panel on Single Issue View* is ticked **On**.

ⓘ   With this option set to Off, only the Projects, Issue types, User Roles, and Groups, as well as associated templates configured on the Permission Schemes are allowed to use Xporter

On a new browser window, logged in as **Arthur**, navigate to the **Improvement** issue type of the project **Academy.** You will notice the Xporter panel isn't displayed on the right sidebar. Click the *Export* drop-down menu, select **Xporter for Jira** and you will navigate to a page titled *Export issues using Xporter for Jira* where an *Error!* message will be displayed informing you are *unable to export the selected issues*. Clicking the **Check Details** button, an Error Reporting pop-over will be displayed, with an entry of the Issue Key you are trying to export, along with the description *User has no permissions for using Xporter for Jira in current Permission Scheme*.

8) Exporting issues within a Permission Scheme

Still logged in as **Arthur**, navigate to the **Bug** issue type of the project **Academy**, and you will notice the Xporter panel is displayed on the right sidebar. However, on the *Template* selector, the only available option will be the template you've set up on the Permission Scheme definition to that issue type. Using the *Export* drop-down menu, the same options will be listed.

Now, try to bulk Export all the 3 issues from the project **Academy.** An *Error!* message will be displayed informing you that you are *unable to export the selected issues*. Clicking the **Check Details** button, an Error Reporting pop-over will be displayed, with an entry of the Improvement Issue Key you are trying to export, along with the description *Issue Type not assigned for the current Permission Scheme*.

If you now try to bulk Export only the **Bug** and **Task** issues from the project **Academy**, an *Error!* message will still be displayed informing you that you are *unable to export the selected issues*. Clicking the **Check Details** button, an Error Reporting pop-over will be displayed because they don't have a common template assigned on the permission scheme definitions.

With your user with Administration access, navigate to the **Permission Schemes** on the Xporter for Jira administration section Apps page of the Jira Administration, click **Permissions** under the Operations column of your entry, and map a common template to both the Bug and Task issue types.

Back on the browser using the user Arthur, try to bulk Export the **Bug** and **Task** issues from the project **Academy** again. This time, you'll be able to complete the operation.

9) Exporting issues with an unauthorized user

With your user with Administration access, navigate to the **Permission Schemes** on the Xporter for Jira administration section Apps page of the Jira Administration, click **Permissions** under the Operations column of your entry. Click the Assign on *Groups allowed to use Xporter for Jira* and on the pop-over dialog, select **jira-administrators.** Click **Assign**. Also, click the **X** next to **King** under the *Roles allowed to use Xporter for Jira*.

Now, back to the browser using the user **Arthur**, try to bulk export the **Bug** and **Task** issues from the project **Academy** again. An *Error!* message will be displayed informing you that you are *unable to export the selected issues*. Clicking the **Check Details** button, an Error Reporting pop-over will be displayed, with an entry informing you that your user doesn't have permissions.

This Exercise is now complete. Proceed to Exercise 5 to learn how to manage your Xporter for Jira license.

ⓘ   If you like this exercise, please leave a comment or a 👍. Your feedback is very important to us.

Thank you in advance.

Enjoy our product. 😃