



# **HP TechPulse Roles and Permissions**

# HP TechPulse Roles and Permissions

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# HP TechPulse Roles and Permissions

## About Roles and Permissions

This document provides information about the roles and permissions for the HP TechPulse portal.

A permission within HP TechPulse represents access to view or edit specific tasks and items inside the portal.

A role within HP TechPulse represents a set of permissions that can easily be applied to multiple portal users.

Built-in roles have been defined for use by different personas including Company IT Administrators, Partners, Managed Service Providers (MSPs), among others. Custom roles that are needed by a specific Partner for their customers' users or even by the customer's users on their own can be created at will.

## Responsibilities Assigning Roles and Permissions

If you are an HP Proactive Insights customer, you are responsible for assigning the built-in roles and permissions to the appropriate users.

If you are an HP Proactive Endpoint Management customer, HP will follow the directions of the company's Primary user to assign the built-in roles and permissions to the appropriate users. For example, the IT Admin can be the Primary user, or the admin may also register different users to assign this role.

In the future, a Company's IT Admin can assign built-in or custom roles to users in the tenant. They may also open tickets requesting that their Partners or HP assign roles to their tenant users. The users who don't have access to the HP TechPulse portal will have to follow the user registration procedure before they can log in to the portal with their roles.

## Manage Roles

These are the ways the roles can be managed by various personas:

Role	Task Description
IT Administrator	Company role that can manage (create, edit) custom roles for the Company.
Partner Administrator Partner Specialist	Partner roles (both Onboard Authorized and unauthorized) that can manage (create, edit, remove) custom roles for the Company.

## Role Levels

Role Level	Description
Company	A company has no sub-tenants in the HP TechPulse system as a Partner would and can manage only their own selves.
Partner	Partners are HP partners who manage devices in HP TechPulse on behalf of one or more companies.
Partner (Onboard Authorized)	Onboard Authorized Partners are the same as Partners but have gone through a rigorous authorization and training process. Therefore, they have been granted greater permissions within HP TechPulse.

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## Built-in and Custom Roles

Both the **Built-in** and the **Custom** roles can be found in the portal under **Settings > ROLES AND PERMISSIONS** tab, where the following tasks may be performed:

- View roles and role details
- Add custom roles
- Duplicate roles
- Edit custom roles
- Remove custom roles

## Built-in Roles

Role Level	Description
IT Administrator	View and edit information about their own company, such as company settings, device and user administration including device location, partner invite/approval/removal, and reporting.
App Admin	Ability to use app deployment features.
EMM Admin	Ability to link Microsoft Intune or VMware Workspace ONE with HP TechPulse analytics.
Hardware Admin	Ability to manage hardware including OS security and patches. View and edit information about their own company's devices such as company PIN, client application preferences, company domain names, device custom fields, third-party software integrations, device-related dashboard widgets, all device administration including device location, all incidents and reports, and view/remove users.
Lost Device Admin (LDA)	Ability to perform lost device protection (currently only location service).
Microsoft Telemetry Admin	Ability to manage Microsoft Telemetry configuration.
Reports Admin (RA)	Ability to run and view reports at customer tenant. Can view all reports and dashboard widgets, device details, incident details, and logs.
ServiceNow Admin	Ability to manage ServiceNow configuration.
User (US)	Ability to perform limited functionality and only on the user's device within customer tenant. No access to HP TechPulse portal.

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## View Details of a Role

1. Navigate to **Settings** > **ROLES AND PERMISSIONS**.
2. Click a role.
3. The **Role Details** box has three sections:
  - **Information:** Displays the role name and description.
  - **Manageability:**
    - **Managed By:** Displays the roles that are managed. Multiple built-in roles or custom roles can be selected here. This is defined as what roles are allowed to change/assign this role.
    - **Managing:** Displays the roles that are manageable. This is defined as what roles a user with this current role can change/assign.
  - **Permissions:** Displays the permissions assigned to the role. Click the down-arrow next to the permission to view the granular permissions.

## Add a Custom Role

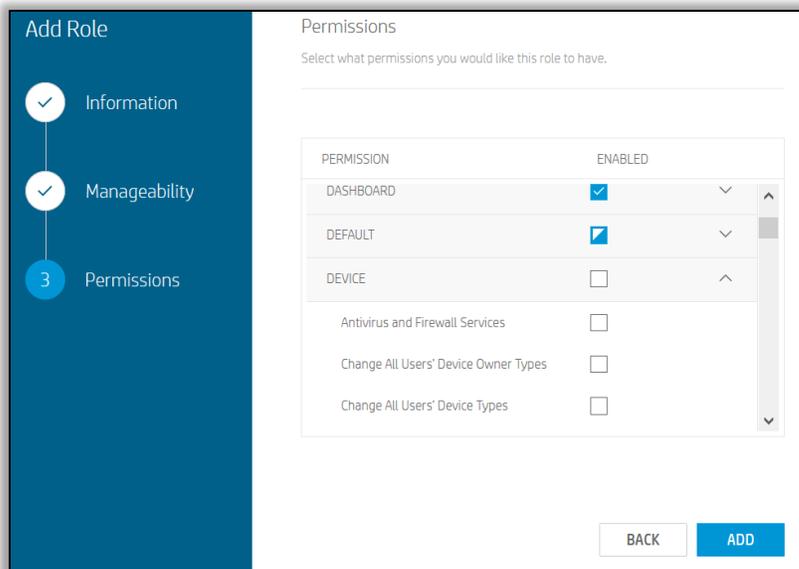
1. Navigate to **Settings** > **ROLES AND PERMISSIONS**.
2. Click **Add**.
3. Enter a unique **Name** (50 chars max) and a **Description** (optional, 250 characters max) for the role.
4. Click **Next**.
5. Optional step.
  - From the **Managed By** drop-down list, select the roles that can manage the new role.
  - From the **Managing** drop-down list, select the roles that are manageable by the new role.
6. Click **Next**.
7. Optional step. Permissions are listed as categories with the option to drill-down to granular permissions within each category. Example: Permission **Device** contains all permissions about device management and **User** contains all permissions about user management.

A permission that is enabled will apply to the role and any user that has the role will be able to access whatever it is that the permission granted.

You can:

- Check the permission category to automatically enable all the granular permissions within the category.
- Drill-down a permission category and select only a few of the granular permissions within the category. The checkbox shows half white and half blue.

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8. Click **ADD**. The new role is listed in the **ROLES AND PERMISSIONS** tab.

## Edit a Role

Built-in roles cannot be edited, but custom roles can be if the current user's assigned role(s) has permission to manage the role.

1. Navigate to **Settings > ROLES AND PERMISSIONS**.
2. Click the role to edit.
3. Except for the role **Name**, you can modify all the other details.
4. Click **SAVE**.

## Create a Duplicate Role

Duplicate roles can be made from both built-in and custom roles. Duplicate roles are custom roles that start off as an exact copy of the original role that can be edited.

1. Navigate to **Settings > ROLES AND PERMISSIONS**.
2. Click the three-dot menu next to the role, then select **Duplicate**.
3. The next steps are same as Add a custom role. You can keep the defaults or make edits as required.
4. Click **SAVE**.

## Add a New User and Assign Roles

1. Navigate to **Customers > Users**.
2. In the **Users** page, click **ADD**.
3. In Add Users, select **Manually**.
4. Click **Next**.
5. Enter First Name, Last Name, and Email.
6. Select the role from the drop-down list.  
Both built-in and custom roles are listed.
7. Click **ADD**.

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## Recommendations for Custom Role Permissions

The following are some recommendations for enabling permissions for specific situations. They are by no means exhaustive and are provided as suggestions for customizing roles. When creating custom roles, the lines listed under the category are the permissions that are suggested to be selected to achieve the level of management mentioned.

Function	Category	Permissions	
User Management	USER	Create User	
		Delete User	
		Delete Users in Bulk Update	
		Delete Valid User	
		Edit All Users	
		Read Users	
		Resend Invitations to Multiple Users	
		Search Users	
		Send Invitation to User	
		Update All Employees	
		Update All User Settings	
		Update All Users of a Tenant	
Device Management	ASSET	Manage Custom Field for Tenant	
		Manage Lifecycle Status for Tenant	
	DEVICE	Change All Users' Device Types	
		Create Device	
		Delete Devices of Others	
		Enroll Device	
		Locate Device	
		<b>Note:</b> Be deliberate and judicious when using this.	
		Search for Devices	
		See Device Details Hardware Tab	
		See Device Details Software Tab	
		See the Map for Device Location	
		Show All Users' Devices	
		<b>Note:</b> Be deliberate and judicious when using this.	
		Unenroll Device	
		Update Devices	
		View All Users' Hardware Inventories	
		View Device Details BIOS Tab	
		View Device Details Health Tab	
View Device Details Location Tab			
<b>Note:</b> Be deliberate and judicious when using this.			
View Device List			
View Overview Tab on Device Details Page			
Dashboard Management	Dashboard	Read Charts Dashboard	
		Read Company Details on Dashboard	
		Read Dashboard	

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Function	Category	Permissions
		Read Device Health Tile on Dashboard
		View Business Review Tile on Dashboard
Report Management	DEFAULT	Manage Reports
		View All Standard Reports
		Antivirus and Firewall Service
Company Management	COMPANY	Get Device Location Policy
		Invite Partner
		Manage Application Catalog
		Manage Assigned Partner
		Manage Association
		Manage Company Information
		Manage Device Configuration
		Manage Domain Name
		Manage Enforce Azure Login
		Manage Firewall on Security Configuration
		Manage Notifications
		Manage Own Notifications
		Manage ServiceNow
		Manage Software Update Configuration
		Manage Windows Information Protection Profiles
		Provision Company PINs
		Read All Software Catalog
		Read Application Catalog
		Read Blue Screen Crash Dump
		Read Bromium License
		Read Company
		Read Company Information
		Read Company PINs
		Read Firewall
		Read Logs
		Read Own Software Catalog
		Read Preferences
		Read Settings
		Read Support
		Update Location Policy
		Blue Screen Crash Dump
		Software Inventory Service

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