App Settings - Managing App Profiles and Roles

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| Script | Direction |
| The campusM app presents differently to different end-users. These different representations are called **App Profiles**. Example App Profiles can be an Open House profile for prospects, a Start of Term for students, and an Alumni Association for alumni. Each App Profile has its own branding, screens, and menu options. | Navigate to App settings within App Manager, and Highlight the Enterprise Roles panel |
| App Profiles are categorized into **Profile Groups**. When a user first accesses the app, they are presented with a list of available Profile Groups to choose from; for example student, prospect, staff, or alumni. After logging in, the end-user can switch between the profiles in that group. | Suggestion: show profile selection in app? |
| Within each App Profile, **App Roles** determine which services and features a user can access. |  |
| In this session we'll learn how to create Profile Groups, App Profiles, and App Roles. |  |
| To create a new Profile Group or edit an existing one, go to App Settings > Enterprise Roles > Profile Groups.  Here you can see a list of your existing Profile Groups, which serve as categories for your existing App Profiles. The Student group, for example, may contain App Profiles for undergraduates and graduates.  You can edit an existing group by clicking its name, or create a new one by clicking Add Profile Group.    Give your new Profile Group a Name.  You may optionally add a sort order, which is this group's position within the profile selection list that the end-user sees on first login.  Click Save.  The new Profile Group has been created. | Navigate to profile group and view / create new group as described  Removed " They are also used to define the authentication mechanism for the Profiles nested within the Profile Group for example, authenticated against your Identity Management Provider, or open access or self-registration. " |
| When first creating a Profile Group, you will need to assign a user authentication mechanism to the Group, under App Settings > Profile Registration Authentication. Click on a group to assign the mechanism. Some authentication mechanisms include your Identity Management Provider, open access, or self-registration. We won't demonstrate this now. | Show this area (App settings > App Settings panel > Profile Registration Authentication) so they can at least orientate where this is |
| Next, let's create the App Profiles themselves, under App Settings > Enterprise Roles: App Profiles. Here you can see your existing App Profiles. You can edit a profile by clicking its name, or add a new App Profile.    You must provide a profile name, assign a profile group, and a language pack, which determines the language used for the interface elements. You can learn about the rest of the settings in the documentation. When done configuring your new profile, click Save. | Navigate to App Settings > Enterprise Roles Panel > App Profiles and view / create new profile as described |
| Having made changes to our App Profiles and Profile Groups, we need to publish these changes to make them available to the end user; under App Settings > Publishing: Publish Content. Select App Profiles and click Publish. Your changes are now available to the end users. | Navigate to App Settings > Publishing and select the App profile checkbox and click publish |
| Finally, let's manage our App Roles, under App Settings > Enterprise Roles: App Roles. Roles allow you to show or hide tiles and services to end users, based on role assignment.    You can edit an existing role by clicking on its name, or create a new role.    Select the App Profile to which this role applies, and give the role a name.  You can learn more about the rest of the fields in the documentation.  These fields define which services this role can access. We recommend not making any edits here, but rather managing this in the service itself.  When done editing the role, click Save. | Navigate to App Settings > Enterprise Roles Panel > App Roles and view / create new Roles as described |
| Now that you know how to create Profile Groups, App Profiles, and Roles within your app, you can use them to create a compelling contextualised and personalised experience for your app users.  Thanks for joining! |  |