

Tester Permissions

Overview

Ready to set up user permissions? In this lab, walk through the standard permissions for your Testers. Here you will be able to practice the concepts you've learned in the course, validate your work, and successfully grant Tester access to your Controls Management Workspace.


Pre-Requisites

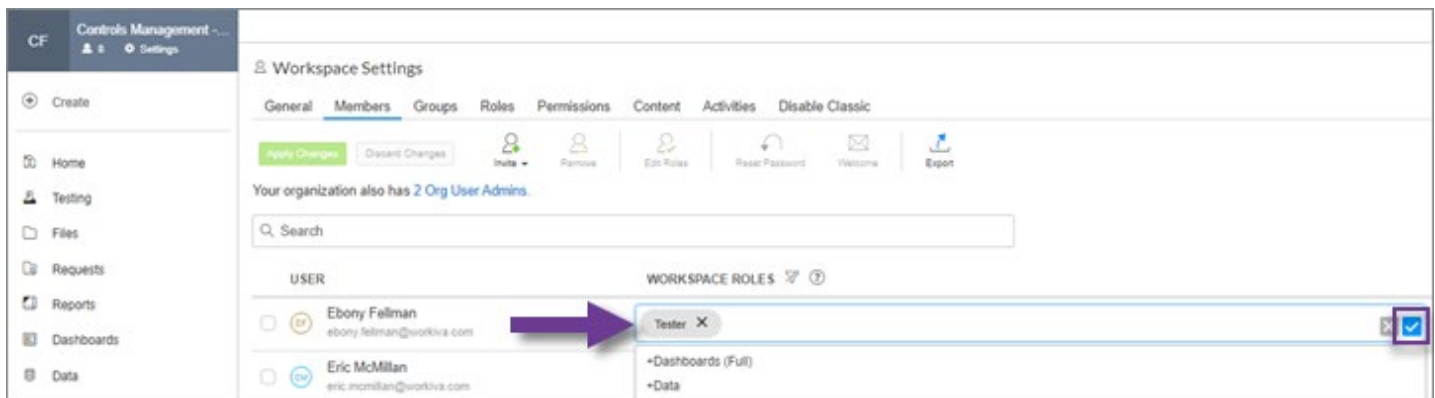
- ✓ Access to "Sandbox" Workspace
- ✓ Must be a Workspace Owner to assign Roles and setup a Group
- ✓ Must be a Data Admin

Procedures

Step 1: Assign Role, Create Group, Add users to Group

Make user management more efficient by using Groups vs individual permissions.

1. Navigate to the **Members** tab of **Workspace Settings**  8
2. Double click to the right of a user and update their role to **Tester**



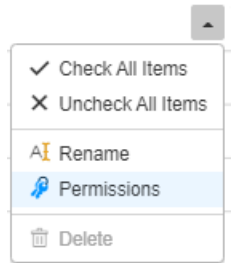
3. Select **Apply Changes**
4. Select **Groups**
5. Select **Create Group**, title group name **Internal Audit**
6. Select the checkbox next to a user's name you'd like to add to the group, select **Create Group**

Step 2: Navigate to Testing Experience

Here, you control what your end-users can see and how they interact with Test Forms, allowing your team the proper access for collaboration. Practice giving your Testers group access to Test Forms.


1. *Navigate to the **Testing** Experience*
2. *Select **Test Forms***
3. *Select the **dropdown** to the right of a folder*
4. *Select **Permissions***
5. *Search for the **Internal Audit** group, grant them **Editor** access*
6. *Search for your name and grant yourself **Owner** access*
7. *Select **Apply Changes***
8. *Repeat for any other folders you wish to give the **Internal Audit** group access to*

*Remember any test form within the folder will inherit the folder level permissions. If explicit permissions are needed for a form, repeat the same actions at the Control Test Form level vs the Folder.



Step 3: Grant access for Internal Audit to Create/Edit Review Plans and Time Entries

Within Test Forms, users who are not Data Admins will need to be given additional access to create/edit review plans and time tracking entries.

1. *Navigate to the **Reports** Experience*
2. *Open the **Admin Reports** folder*
3. *Select **[Permissions] Review Plans***
4. *Select **Permissions*** 
5. *Double click "Add groups or individuals as collaborators"*
6. *Search and select **Internal Audit** group, select blue checkbox*
7. *Select **+Add Editing Rule** to the right of your Testers group*
8. *Select **Create and Update Review Plans**, select blue checkbox*



Your Permissions should now display your Internal Audit group beneath Groups, and all users within that group under Collaborators with checkboxes next to Viewer and Editor.

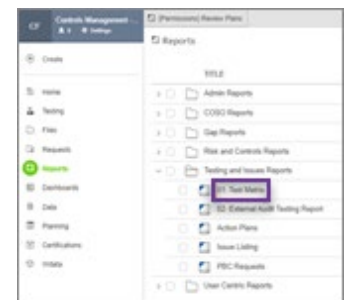
GROUPS 1		VIEWER	EDITOR	EDITING RULES
Testers	3	✓	✓	Create and Update Review Plans
COLLABORATORS 3		VIEWER	EDITOR	EDITING RULES
Eric McMillan		✓	✓	Create and Update Review Plans
Jared Jasso		✓	✓	Create and Update Review Plans
Laura Formal		✓	✓	Create and Update Review Plans

9. Repeat Steps 1 – 8 for [Permissions] Time Tracking Report

Step 4: Grant Access to Test Matrix Report


Now that Test Form permissions are completed, often Admin’s want to give Testers visibility into other data in the account. Let’s assign our Internal Audit group access to the “Test Matrix” report for the ability to holistically view testing progress.

1. Navigate to the **Reports** experience
2. Open the **Testing and Issues Reports** folder and select the **01. Test Matrix** report
3. Select **Permissions** 
4. Double click “Add groups or individuals as collaborators”
5. Search and select **Internal Audit** group, select blue checkbox 
6. Repeat for any other Reports you’d like Testers to be able to view



Step 4: Grant access for Testers to view Dashboards

Give access for Testers to view dashboards

1. Navigate to the **Dashboards** Experience
2. Select the dropdown to the right of the **SOX Testing Status Dashboard**
3. Select **Permissions**
4. Double click “Add groups or individuals as collaborators”
5. Search and select **Internal Audit** group, select blue checkbox 
6. Repeat for any other Dashboards you’d like Testers to be able to view