Process/Control Owner Roles and Permissions

Overview

Ready to set up user roles and permissions? In this lab, walk through the steps for assigning the standard roles and permissions for your Process and Control Owners. Here you will be able to practice the concepts you've learned in the course, validate your work, and successfully grant Process/Control Owner access to your Controls Management Workspace.

Pre-Requisites

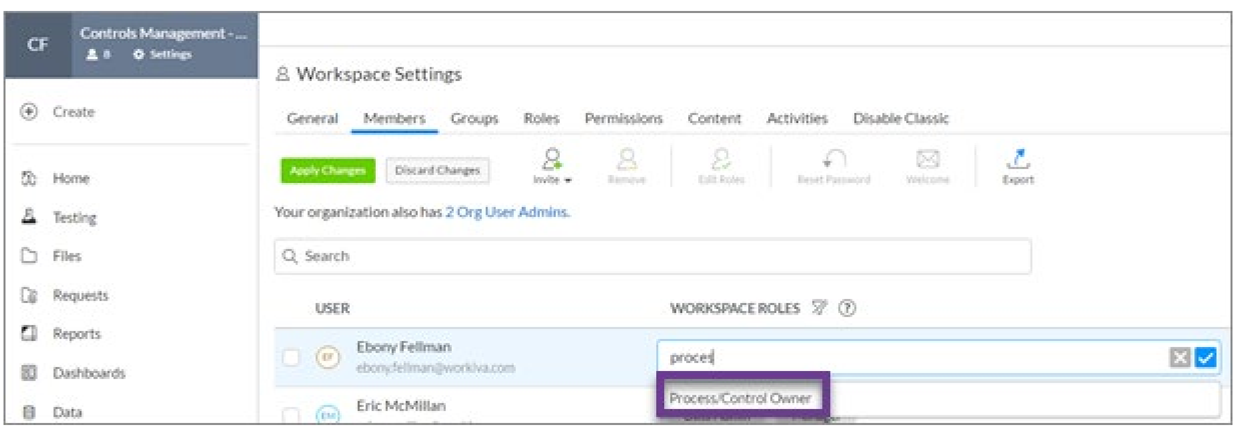
- ✔ Access to a "Sandbox" Workspace
- ✔ Must be a Workspace Owner to assign Roles and setup a Group
- ✔ Must be a Data Admin
- ✔ Ensure you have a file in Workspace before Step 2

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 **Process/Control Owner**

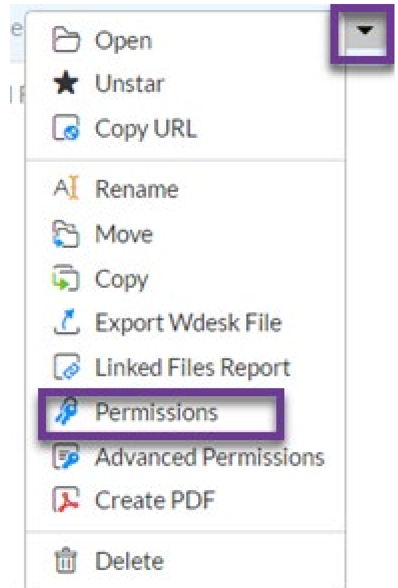


3. *Select* **Apply Changes**
4. *Select* **Groups**
5. *Select* **Create Group** and *name* it **Process Owners**
6. *Select* the checkbox next to the user you gave the Process/Control Owner role to, then *select* **Create Group**

Step 2: Navigate to Files

Assign your Process/Control Owners access to Files — which is where Narratives and Flowcharts are stored. Here, you control what your end-users can see and how they interact with files, allowing your team the proper access for collaboration.

1. *Navigate* to the **Files** Experience
2. *Select* the **dropdown** to the right of a file
3. *Select* **Permissions**
4. *Search* for **Process Owners** group, *grant* them **Editor** access
5. *Search* for your name and *assign* **Owner,** *change* **All Users** to **View**
6. *Select* **Apply Changes**
7. Repeat for any other Spreadsheets, Presentations, or Documents you wish to give the access.



Step 3: Grant access to the User Centric "My Controls - Control Owner" report

1. *Navigate* to the **Reports** Experience
2. *Open* the User Centric **My Controls** report
3. *Select* **Permissions**

4. *Double click* "Add groups or individuals as collaborators"
5. *Search and select* **Process Owners** group, *select* blue checkbox
6. *Open* the right hand panel and *select* the **key** to create an **Editing Rule**
7. *Name* the Rule, *select* **Control Description** under editable columns, *select* **Save**
8. *Double click* to the right of the Process Owner group and *add* your new rule, *select* blue checkbox