

# HRBP Access for folders

Workforce



# | Why?

## Problem

Currently we don't support the folder level permissions with the clients in the 360 or EX. Workforce modules does not have ability share HRBP access.

We have to share the folder permissions with different roles and share the access for different capabilities on the Survey deployments.

## User Story

Jane is an Administrator who manages the 360 deployments want to share the folder access to managers.

She want to have the following abilities for 360 -

1. Share the 360 Survey folder with the HR Managers
2. Share the folder access based on the roles and permissions.

# User Persona



Jane , HR Administrator  
Manager

# User Persona



**Jane Doe**  
Admin, 360 consultancy

## Name

## Behaviour and Actions

- Handles the 360 Surveys product provided by QP
- Expertise in any Reporting/Visualisation Tool
- Understand the information by group, and also in the largest context of the company

## Demographic

## Needs and Pain Points

- Young Women
- Married
- Own the culture and constantly strive to maintain the best
- Handles getting insights from the data & coming up with actions.

- Unable to share the 360 survey folder with her clients and HR managers
- Ability to share the folder permissions with the specific roles in the organisation
- Unable to share the access of specific surveys and the analytics with the HR Managers

# Use cases

- 1) Jane is an administrator in a HR Consultancy firm. She is responsible for 360 surveys with her team for several clients. She wants to give limited access of the 360 folders to her colleagues who are incharge of the respective clients. Currently, all of Jane's colleagues have same level of folder accessible in their 360 account and Jane cannot control it.
- 2) Jane is an administrator in a HR Consultancy firm. She should be able to share folders with her customers who are not part of her org so that they can review the surveys in the folder and make sure their requirements are met. As a power user, she should be able to share folders with all users in her org in one go so that she doesn't have to select individual user while sharing.
- 3) Jane is HR Manager for a multinational company with approx 4500 employees. They create 360 surveys as per department and have dedicated managers to analyze the results. They report to the department stakeholders & leaders. As the manager have to work with their department colleagues while creating the survey by sharing the survey folder with them, we want to limit the access to a specific folder for some users while sharing. This will allow confidentiality within various departments.

## | Use case - OPTM360

### Jane, 360 Surveys Administrator

Jane is an Administrator at a consultancy, who manages the 360 deployments want to share the folder access to managers. She want to have the following abilities for 360 -

1. Share the 360 Survey folder with the HR Managers
2. Share the folder access based on the roles and permissions.
3. Layers of admin access to administer (View all in a folder or view subset with ability to download status reports).
4. Layers of admin access to allow client to fully administer (including ability to encrypt data with RAA so personal data is not visible to the admin)".
5. The folders that certain roles have should only see the folders shared with them.

# Solution Description

To provide shared folders - having permissions on a folder level access with users which the administrator can control.

With the new User and Role management, Jane can

- Create a User role
- Specify the permissions while creating a role
- Create a User with the required role/Assign the role to the users

Jane can create multiple roles according to her requirement and assign the role to the respective user.

# Required Documents

Recording -

[https://drive.google.com/file/d/1jKIUQgKeLz\\_Mmadhi6Y4JNOLbN3igyZg/view?usp=sharing](https://drive.google.com/file/d/1jKIUQgKeLz_Mmadhi6Y4JNOLbN3igyZg/view?usp=sharing)

[https://drive.google.com/file/d/1K5UsuPcftKXCs-IWQnx-r\\_h572N9Mq1/view?usp=sharing](https://drive.google.com/file/d/1K5UsuPcftKXCs-IWQnx-r_h572N9Mq1/view?usp=sharing)



# Create User in the Organization

Workforce

Global search for users, surveys, tickets Admin

Upgrade Now

Surveys Organization Usage Dashboard Mobile

Read our blog

- Explore research method
- Learn about new features

Users

Roles

Teams

Libraries

Settings

Wiki

+ Add User

Search User All Users

<input type="checkbox"/>	Email	Last Login	Team	Role	Status
<input type="checkbox"/>	mrunmayee.kulkarni@questionpro.com	5 hours ago	Unassigned	Super Admin	Employee Admin
<input type="checkbox"/>	zolin.gonsalves+wf1@questionpro.com	4 months ago	Unassigned	User	Active
<input type="checkbox"/>	carla.mininel+wf@questionpro.com	N/A	Unassigned	User	Active
<input type="checkbox"/>	ismael.longhi+wf@questionpro.com	2 months ago	Unassigned	User	Active

# Add role to the user

Workforce

Global search for users, surveys, tickets Admin

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Users

Roles

Teams

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Settings

Wiki

+ Add Role

<input type="checkbox"/>	Role	Active users	Inactive users
	User	3	0
	Super Admin	1	0
<input type="checkbox"/>	Admin	0	0

# Set permissions to the role for the Survey in the selected workforce folder

Role Name

Product: Surveys  
[Select Product - 360 or EX](#)

**Add Workforce in the dropdown**

User Management Edit Distribute **Analytics** Integration Other

- Select All
- Edit Responses
- Delete Responses
- Conjoint Analysis
- TURF analysis
- Maxdiff Analysis
- Sentiment Analysis
- Correlation Analysis
- GAP Analysis
- Crosstab Reports
- Schedule Reports- FTP

[Share Folder](#)

Cancel [Create Role](#)

# Capabilities and permissions for 360

## Edit

- Edit Workspace
- Design
- Settings - Add relationships
- Settings - Edit general display settings
- Add Languages
- Add media

## Distribute

- Edit/Add Deployments
- Send Tab - Edit Participant selection
- Send Tab - Edit Participant options
- Send tab - Compose messages
- Send Tab - Edit Templates
- Send tab - Access sent history
- Report Options
- Portal Options- Instruction messages
- Portal Options- Settings

## Analytics

- Dashboard
- Edit/Create Individual Report

## Manage Data

- Manage Downloads

- **Manage Employee roaster**

- Employee
- Review
- Integration
- Portal Permissions
- Portal Content
- Portal Languages
- Portal Setup
- Admin

# Capabilities and permissions for EX

- **Edit**
  - Edit Workspace
  - Design
  - Add Languages
  - Add Media
  - Completion Settings
  - Notification Settings
- **Send**
  - Compose
  - Sent History
  - Templates
- **Analytics**
  - Dashboard
  - Scorecard
  - Overall
  - Text Report
  - Text Analysis
  - Driver Analysis
  - Custom scorecard
- **Manage Data**
  - Downloads
  - Import
  - Edit Responses
  - Export Settings
  - Export Report
- **Manage Employee roster**
  - Employee
  - Review
  - Integration
  - Portal Permissions
  - Portal Content
  - Portal Languages
  - Portal Setup
  - Admin

### Add New Role ?

Role Name  Product: Workforce

[Employee Roster](#)
[360 Edit](#)
[360 Distribute](#)
[360 Analytics](#)
[EX Edit](#)
[EX Analytics](#)
[Manage Data](#)

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Select All

Employee List

Idea Board Moderate

Portal Permission

Admin Custom Marker

Employee Import

Review Setup

Portal Languages

Admin Survey Comparison

Employee Setup

Review Dashboard

Portal Stats

Admin 360 Category Headers

Employee Custom Field

Integration Setup

Portal Setup

Idea Board Setup

Portal Content

Admin Lifecycle

Cancel
Create Role

<input type="checkbox"/>	Super Admin	1	0
<input type="checkbox"/>	Workforce Edit	1	0
<input type="checkbox"/>	Admin	0	0

# Change workforce to folder

The screenshot shows the 'Workforce' management page. At the top, there is a purple header with a question mark icon and the text 'Workforce'. Below this, a grey bar contains 'QuestionPro', '24 Employees', and a link 'Manage Employee Roster >>'. A dropdown menu is open, showing two items: 'Trial123 1' and 'QuestionPro 24'. Below the dropdown, a red box highlights two buttons: 'Create Workforce' and 'Edit Workforce'. The main content area is a table with columns for an index, a name, and a 'Type'.

		Type
1	Recruiting Experience A123	Survey
2	360	360 Review
3	On-boarding Experience	Survey

The screenshot shows the 'Edit Workforce' dialog box. The title bar says 'Edit Workforce'. Inside, there is a 'Workforce Name' field with the value 'QuestionPro'. An 'Update' button is visible in the bottom right corner. The background shows a blurred view of the workforce list.

### Edit Workforce

Workforce Name \*

Update

Study Name	
1	<b>Recruiting Experience A123</b>
2	360  360 Review Mar 29 2022 1 month ago Active 1 0
3	On-boarding Experience  Survey Mar 29 2022 1 month ago Active 0 0



# Share folder option on a Folder level

Workforce

Global search for users, surveys, tickets Admin

Upgrade Now

OPTM 360 24 Employees Manage Employee Roster >>

Tutorial video

Share Folder Sync Responses Use Existing Survey Create a New Study

Study Name	Type	Created	Status	Deployments	Responses
1 Workplace Culture	Survey	Dec 14 2021 5 months ago	Active	1	0
2 On-boarding Experience	Survey	Dec 13 2021 5 months ago	Active	0	0
3 Leadership	360 Review	Dec 09 2021 5 months ago	Active	0	0
4 360	360 Review	Nov 30 2021 5 months ago	Active	2	1
5 360 Feedback	360 Review	Nov 11 2021 6 months ago	Active	14	17

## Share folder option on a Folder level, add roles in the options

The screenshot displays the 'Folder Sharing' dialog box in the QuestionPro interface. The dialog box is titled 'Folder Sharing' and contains a dropdown menu for 'Folder sharing options'. The dropdown is open, showing four options: 'OFF - only specific users or teams can access', 'Everyone at Workforce will have access to Edit', 'Everyone at Workforce will have access to Reports', and 'Everyone at Workforce will have access to Copy'. The 'Save Changes' button is highlighted in blue.

Background interface elements include:

- My Surveys: 0
- Mrunmayee Kulkarni: 7
- + New Survey
- + Add Folder
- Survey Name
- test 3
- 26
- 25
- 23
- 30 questions
- Apr 12 2021
- Dec 08 2021
- Active
- Assignment
- Apr 07 2021
- Nov 24 2021
- Active
- 1
- Apr 06 2021
- Apr 07 2021
- Active
- Responses
- 0
- 0
- 0
- 5
- 2
- 0
- 0

# Adoption for Roles

**Folder Sharing** ?

Folder sharing options

OFF - only specific users or teams can access

Share folder with teams

Share folder with users

Cancel **Share**

- Can Edit
- Can Copy
- Can Report

**My Surveys** 0

Mrunmayee Kulkarni 7

+ New Survey

+ Add Folder

Survey Name	Start Date	End Date	Status	Responses
test 3				0
26				0
25				0
23				5
30 questions	Apr 12 2021	Dec 08 2021	Active	2
Assignment	Apr 07 2021	Nov 24 2021	Active	0
1	Apr 06 2021	Apr 07 2021	Active	0

# | Solution

The Administrator will be able to give the permissions to share the survey folders with Users and Roles in the 360.

This will enable the Administrators to share the permissions with HR Managers to create, edit or modify the surveys, distribute the surveys, and look at the analytics dashboard.

Refer to this sheet for permissions under each role and their description-

[https://docs.google.com/spreadsheets/d/1E33q8-FUJMOdIsN\\_GFMxBA2ezbTg4X70izZSj1ApvFo/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1E33q8-FUJMOdIsN_GFMxBA2ezbTg4X70izZSj1ApvFo/edit?usp=sharing)

We are going to follow the same user flow as that of our core survey platform to share the folders.

**Note:** A user can only be assigned to one role. A user cannot be a part of multiple roles.

## Folder permissions - More Use Cases by actual clients from the competitor platforms (for advanced cases like filtered by demographics)

1. In dashboards is really easy to restrict access, but I am having the same question about the Employee Directory. I would like to have regional admins, that only have access to the employees details of their region and not other BUs. Also, I would not like that if they make a change in the participant information of a project, that affects the directory.
2. I have a project in a global company that wants to use EE by the local HRBP's but w/o them seeing the employees of each other, meaning only the central HR will have access to the full directory and locals will see only their own employees. You can limit visibility by country or by site, that's what we did. what we did not decide is give them only visibility to the managers and teams they are responsible for, that was way too much work to set up and would increase complexity greatly. We justified that that they should be able to compare plants and teams within the same country to exchange best practices and those are more equitable comparisons as they share the same cultural context.
3. Is it possible to assign the results of a team to another manager? I have a situation, that when the data were uploaded to the platform before the survey and when the survey was closed, a team reported to a person who is not a manager of this team any more. There's a new person in the manager's role for this team. I'd like him (the new manager) to work with the results in the platform as he also will conduct the Close the Loop sessions with his team and will hopefully see the improvement in the next year's edition of the survey.
4. The best/easiest solution in these situations is to have the HRBP PDF the results from the prior leader and provide the PDF'd report to the new leader. Ideally the HRBP would walk this new leader through the results, so that the HRBP can give input/context. Because we survey quarterly, the new leader will get access to tool and their team's next results relatively quickly.

# Capabilities and permissions for 360

## **Edit**

- View Settings
- Settings - Edit relationships
- Settings - Edit general display settings

## **Distribute**

- View Deployments
- Edit Deployments
- Send Tab - View
- Send Tab - Edit Participant selection
- Send Tab - Edit Participant options
- Send tab - Send Mail / Edit Template

## **Analytics**

- View Dashboard
- View Individual Report
- Edit Individual Report

## **Manage Employee roaster**

Edit Employee  
View Employee

# Capabilities and permissions for EX

- **Edit**
  - Edit Workspace
  - Design
  - Add Languages
  - Add Media
  - Completion Settings
  - Notification Settings
- **Send**
  - Compose
  - Sent History
  - Templates
- **Analytics**
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  - Text Report
  - Text Analysis
  - Driver Analysis
  - Custom scorecard
- **Manage Data**
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# Any Questions?



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