HRBP Access for folders

Workforce

P QuestionPro

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

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

Needs and Pain Points

- 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

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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.

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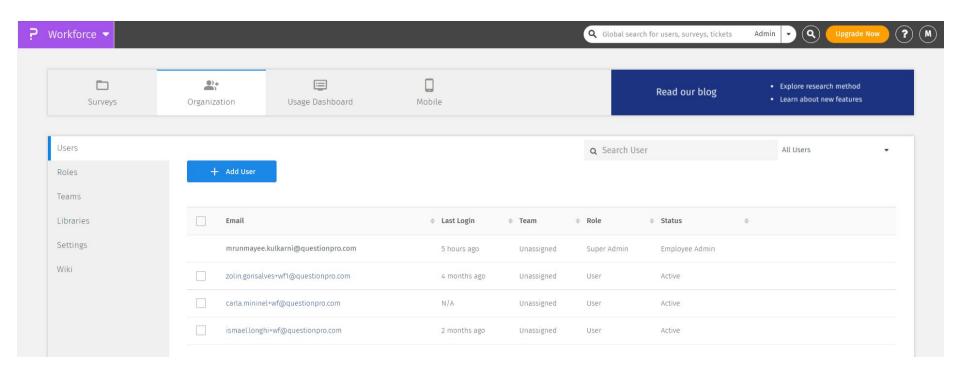
Required Documents

Recording -

https://drive.google.com/file/d/1jKIUQqKeLz_Mmadhi6Y4JNOlbN3igyZg/view?usp=sharing

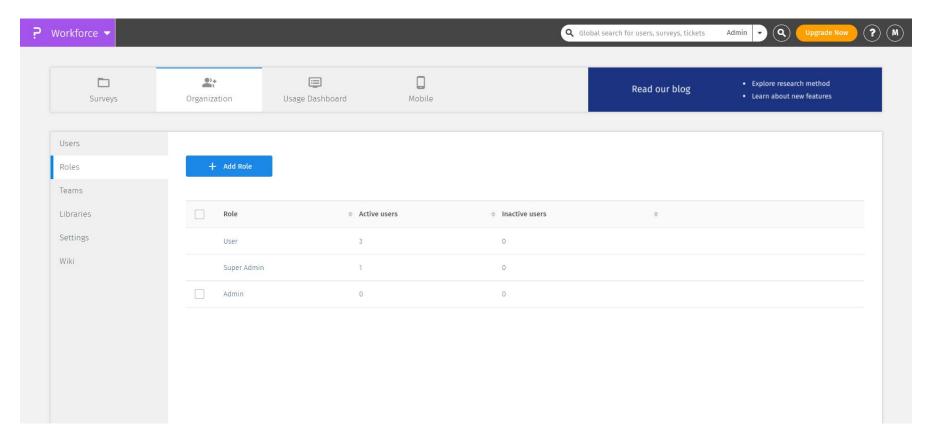https://drive.google.com/file/d/1K5UsuPcfbtKXCs-JWQnx-r_h572N9Mq1/view?usp=sharing

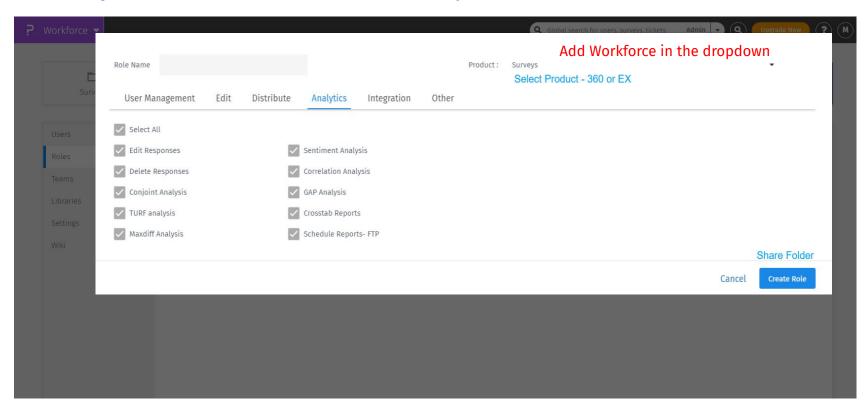# Create User in the Organization

Add role to the user

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

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 roaster**
  Employee
  Review
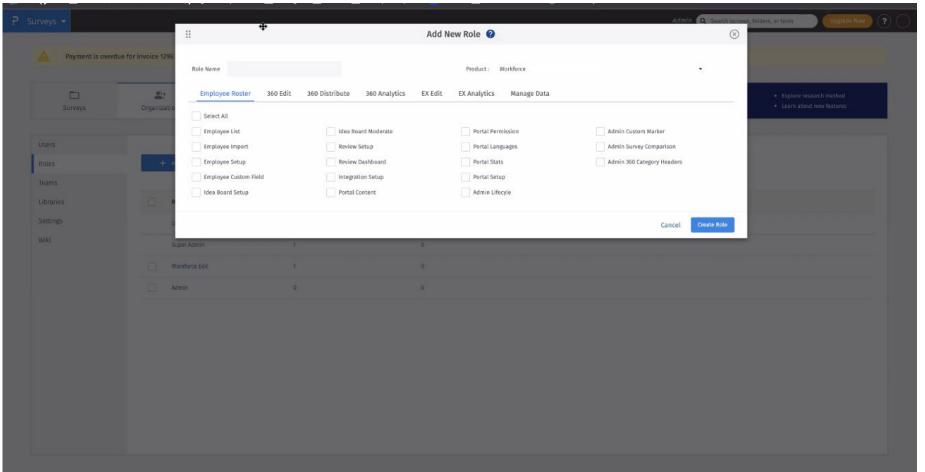 Integration
  Portal Permissions
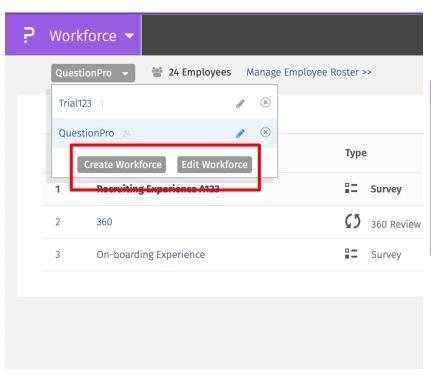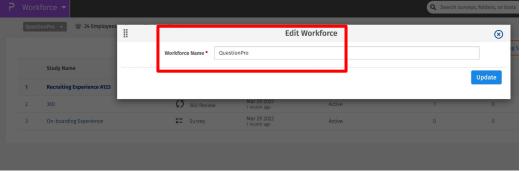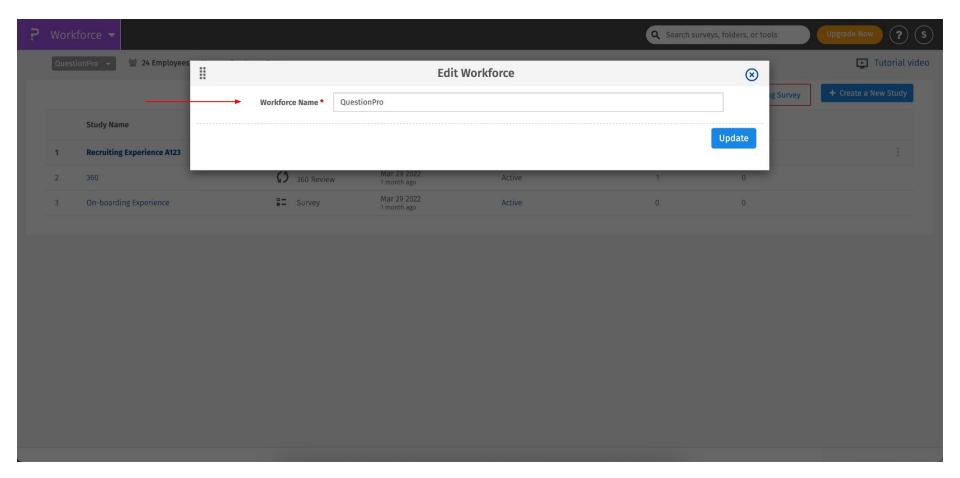 Portal Content
  Portal Languages
  Portal Setup
  Admin

Admin   Search surveys, folders, or tools   Upgrade Now   ?

Payment is overdue for invoice 1296

Surveys   Organizatio

- Explore research method
- Learn about new features

Users

Roles

Teams

Libraries

Settings

Wiki

+ A

R

U

Super Admin   1   0

Workforce Edit   1   0

Admin   0   0

Add New Role ?

Role Name [   ]   Product :   Workforce   ▾

Employee Roster   360 Edit   360 Distribute   360 Analytics   EX Edit   EX Analytics   Manage Data

☐ 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 Lifecyle

Cancel   **Create Role**

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Change workforce to folder

Search surveys, folders, or tools

Upgrade Now

QuestionPro ▾   24 Employees

Tutorial video

Edit Workforce   ✕

Workforce Name * | QuestionPro |

Update

	Study Name
1	**Recruiting Experience A123**
2	360
3	On-boarding Experience

360 Review   Mar 29 2022 1 month ago   Active   1   0

Survey   Mar 29 2022 1 month ago   Active   0   0

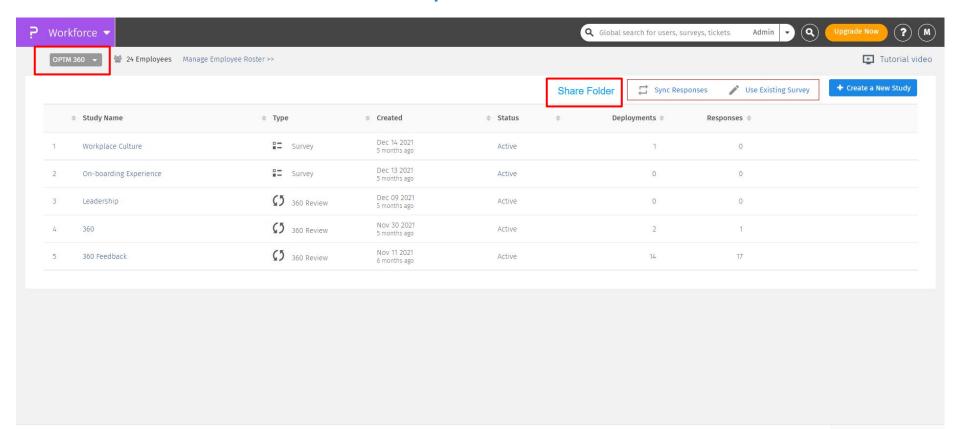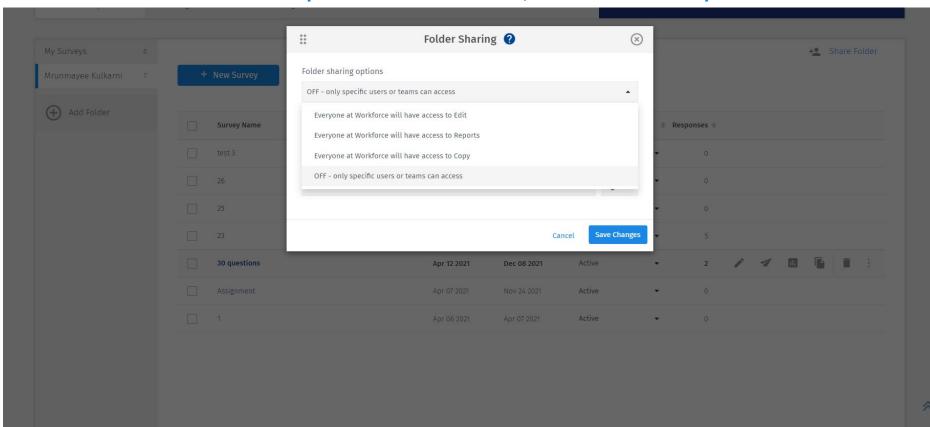g Survey   + Create a New Study

QuestionPro
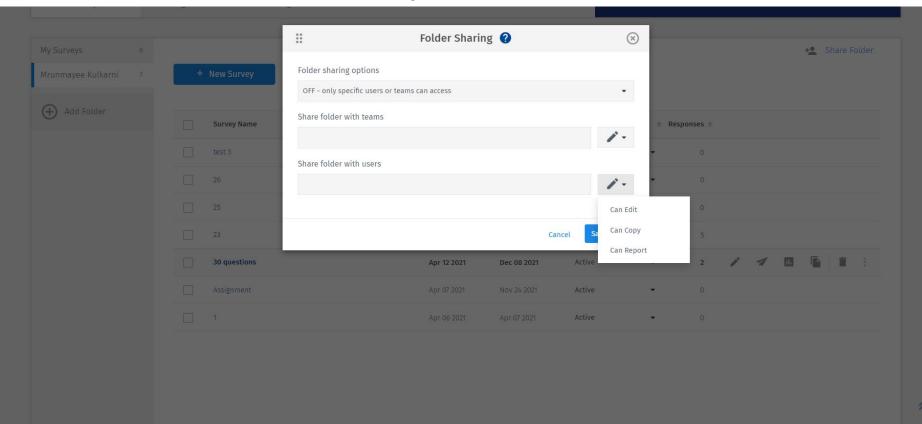
Share folder option on a Folder level

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

Adoption for Roles

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-FUIMOdIsN_GFMyBA2ezbTg4X70izZSj1ApvFo/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 de 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**
  Dashboard
  Scorecard
  Overall
  Text Report
  Text Analysis
  Driver Analysis
  Custom scorecard
- **Manage Data**
  Downloads
  Import
  Edit Responses
  Export Settings
  Export Report

- **Manage Employee roaster**
  Employee
  Review
  Integration
  Portal Permissions
  Portal Content
  Portal Languages
  Portal Setup
  Admin

Any Questions?

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