

Community Office Hours

User Roles & Team Permissions

Housekeeping Items

- Today's session is recorded and will be posted in the AuditBoard Community
- CPE credits will not be issued today :(
- Live Demos are performed in a Demo Site
- Please use the Zoom Q/A function to submit questions

01



Introduction

Presenters



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Agenda

- High level review of User Access
- User and Team & Category Management Best Practices
- Live Use-Case Demonstrations (Team access)
- Q&A

02



User Access

User Access

Users & Roles

Users are created & assigned a default role:

1. Platform Admin
2. Team Member
3. Stakeholder



Teams

Users are assigned to a team or teams. Each team can be configured to see different:

- Modules
- Icons
- List views.

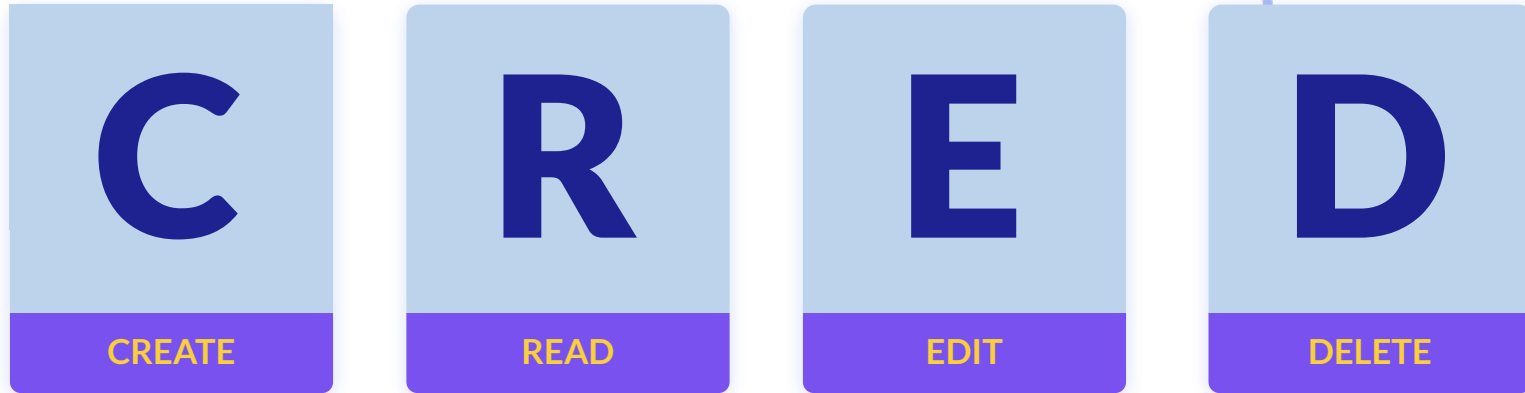
Cycle/Category/Type

Teams are assigned to assigned to cycles/categories/types.

1. Create
2. Read
3. Edit
4. Delete

Basic 4 Governing Principles of Access

There are 4 basic actions which govern all permissions in AuditBoard:

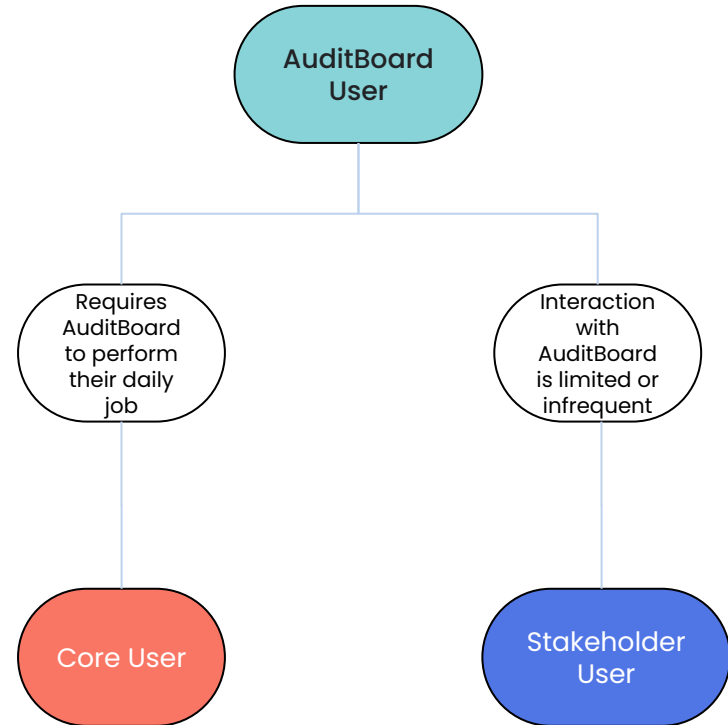


User Definitions

User - Anyone who needs to interact with AuditBoard will require an user account

Core User - Day-to-day users who will be in AuditBoard frequently to complete their work (i.e. Internal Audit, Risk Management, IT Compliance, etc.)

Stakeholder User - Users who will interact with AuditBoard on a limited or infrequent basis (i.e. business users, external auditors)



03



Roles & Teams

Roles vs Teams (Team based permissions)

Role	Team
System required	Min. 1 team is required to gain access to a module
One role per user	Multiple teams per user
Configured for the platform	Tailored per module
All UX permissions disabled	UX permissions enabled based on module
Governs field-level visibility	CRED permission granted through team assignment on Categories

04



Live Demo

Q&A

Customer Resources

Education



 **AUDITBOARD
ACADEMY**

Support



 **AUDITBOARD
Help Center**

**Webinar Recording will be available
in the Community** *(sent via Email)*

Connection



 **AUDITBOARD
COMMUNITY**

Additional Resources

Out-of-Box Role, Team and License Matrix

Role	License	Use Case Overview
Platform Admin [CRED]	Core User	Full access to platform settings Commonly added to admin teams to gain access to modules
Team Member [CRED]	Core User	Admin with full access to a specific module
Team Member [CRE]	Core User	Admin access except for DELETE Admins commonly delegate certain tasks to them to manage in details
Team Member [R]	Core User	Perform core activities based on assignment
Stakeholder	Stakeholder	Perform non-core action based on assignment
Stakeholder	Stakeholder	View and download data

Help Center Resources

1. [Team Permissions Overview](#)
2. [Core User Overview](#)
3. [Managing Core Users](#)
4. [Category & Team Owner Overview](#)
5. [Conditional Permissions Guide](#)
6. [Editing Role Permissions Guide](#)

Teams

Teams is a flexible way to group different users together, either by function, geography, business unit, or other sub groups. Teams work in conjunction with the role of each user and increase the level of access for both visual menus (UX) and CRED actions. A user can ONLY be assigned to one role at a time , but can be assigned to multiple teams.

Team can support various use cases such as providing elevated access to a group of users or segregating users' access. In addition, teams provide greater flexibility for cross-module access or restricting a certain group of users to a single module.

EXAMPLE USE CASE

If the users with "Owner" role are restricted to view assigned controls only instead of viewing all controls, "US" Team can be used in such a way where users with "Owner" role & assigned to "US" team can view US entity controls.

Teams Used 3 Ways

01

Group Users

Manage a group of similar users (i.e. region, department, etc)

02

Choose UX/UI

Determine which menus and icons (UX/UI) the team should see.

Without menus and icons, users will not be able to perform any actions.

03

Grant CRED Permissions

Assign the team to the right level for action permissions. The levels are admin, manager, and view-only

Team Management

One or more users can be assigned to teams as team owners. Team owners can manage the users in their team(s) to ensure appropriate level of access is granted.

Often times, Platform admin(s) delegate team management responsibilities to team owners.

<i>Users assigned as Team Owner</i>	<i>Users with Platform Admin Role</i>
<p><i>Access limited to the team they own</i></p> <ul style="list-style-type: none">• <i>Manage team details (i.e. description, name, uid)</i>• <i>Manage team owner(s)</i>• <i>Manage team member(s)</i>	<p><i>Full access to all teams</i></p> <ul style="list-style-type: none">• <i>Create teams(s) & Clone teams</i>• <i>Modify team UX permissions</i>• <i>Manage team details (i.e. description, name, uid)</i>• <i>Manage team owner(s)</i>• <i>Manage team member(s)</i>

Category Management

One or more owners can be assigned to a category.

Category owners can perform the following actions to their assigned categories

- Add and remove other owner(s)
- Manage team assignments
- Manage category details such as name and fields layout (form template)
- Manage options available on the category level such as “required fields”

IT Assets

General

Name

Owners

Allowed On

Display Order

Form Templates

Auditable Entity [Edit](#) [New](#)

Users assigned as Category Owner

Manage assigned category

Users assigned as Admin Team on the Category

*Manage objects (audits, controls, issues etc.)
in the category*

Thank you.

Questions?

Email customersuccess@auditboard.com.