Role-based Security in Questionmark OnDemand: Effectively Managing Users

April Barnum, Authoring Product Manager
Rick Ault, Trainer
Learning Objectives

1. Understand the role-based security model  
   Rick
2. Create and configure roles  
   Rick
3. Assign roles to / Remove roles from users individually and collectively  
   Rick
4. Use roles to control access to question and assessment content  
   April
Understand the role-based security model

Learning objective #1
Questionmark Offers Many Modules

- Users
  - Roles
- Content
  - Published Content
- Schedules
  - Server Management
- Coaching
  - Transcript
- Item Analysis
  - Results Export
- Scoring Tool
  - Results Importer
Questionmark Offers Many Modules

Users
Roles
...

Content
Published Content
...

Schedules
Server Management
...

Coaching
Transcript
...

Item Analysis
Results Export
...

Scoring Tool
Results Importer
...
Not Everyone Should Be Able to Do Everything...

E.g. you may want to have users who can just **create items**

Users
Roles
...

Content
Published Content
...

Schedules
Server Management
...

Coaching
Transcript
...

Item Analysis
Results Export
...

Scoring Tool
Results Importer
...
With Role-Based Security, You Use Roles to Define What Users Are Allowed to Do.

What role does a user have in your organization? Can be a job role, project role, ...

...
Hi, I am Ella. Today is my first day here.
What will you be doing?
I am filling in for Wendy who is on maternity leave.
Cool. Wendy is our reporting rock star. I will set you up with an account.
Thanks. I will also assist with managing our item bank.
So you need Reporter and Item Bank Administrator access?
I guess so. Is that easy to set up?
Sure is. Let me give your account these two roles.
When Ella Logs On, She Sees...

Report

- **Assessment Overview Report**
  See an overview of results for one or more assessments.

- **Export to ASCII**
  Export results to comma separated ASCII for download to a spreadsheet or statistics package.

- **Score List Report**
  See a list of results for a single assessment.

- **Coaching Report**
  See detailed results for one participant taking one assessment.

- **Grade Book Report**
  See a table of participants and assessments showing scores achieved.

- **Survey Report**
  See question analysis from a survey perspective, including frequency graphs of answers.
When Ella Logs On, She Sees...

She doesn't see the People or Administration menus

Reporting

- **Assessment Overview Report**: See an overview of results for one or more assessments.
- **Export to ASCII**: Export results to comma separated ASCII for download to a spreadsheet or statistics package.
- **Score List Report**: See a list of results for a single assessment.
- **Coaching Report**: See detailed results for one participant taking one assessment.
- **Grade Book Report**: See a table of participants and assessments showing scores achieved.
- **Survey Report**: See question analysis from a survey perspective, including frequency graphs of answers.
Authentication
Roles Based Security

What Information can Someone See

User’s Role(s)

Portal

Authoring

Delivery

Analytics

Learning opportunities

Videos
White papers

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Blog

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Blog

Whats new in our new blog available in this interim version.
Authentication
Roles Based Security

Styles Sheets and Templates

User’s Role(s)

Portal
Authoring
Delivery
Analytics

How they see it
Create and configure roles

Learning objective #2
Managing Roles

- You can go to People > Roles to do the following with roles:
  - Add
  - Edit
  - Delete

<table>
<thead>
<tr>
<th>Role</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>edit role</td>
</tr>
<tr>
<td>Edit</td>
<td>edit role</td>
</tr>
<tr>
<td>Delete</td>
<td>edit role</td>
</tr>
<tr>
<td>Adm</td>
<td>edit role</td>
</tr>
<tr>
<td>Assessment Author</td>
<td>edit role</td>
</tr>
<tr>
<td>Item Bank Administrator</td>
<td>edit role</td>
</tr>
<tr>
<td>Item Author</td>
<td>edit role</td>
</tr>
<tr>
<td>Monitor</td>
<td>edit role</td>
</tr>
<tr>
<td>Publisher</td>
<td>edit role</td>
</tr>
<tr>
<td>Reporter</td>
<td>edit role</td>
</tr>
<tr>
<td>Reviewer</td>
<td>edit role</td>
</tr>
<tr>
<td>Role Manager</td>
<td>edit role</td>
</tr>
<tr>
<td>Scheduler</td>
<td>edit role</td>
</tr>
<tr>
<td>Test Center Administrator</td>
<td>edit role</td>
</tr>
<tr>
<td>Translation Manager</td>
<td>edit role</td>
</tr>
<tr>
<td>Participant</td>
<td>edit role</td>
</tr>
</tbody>
</table>
Adding a Role

- Test Center Administrator
- Translation Manager
- Participant

- Type a name for your role in the box and click/tap Add role
Editing a Role

- *Edit role*: change the role name
- *Edit permissions*: change which permissions are included in the role
Deleting a Role

- First, *edit* the role, then click/tap *Delete role*
TIP: Do Not Edit Default Roles but Create New Roles

- We update the default roles from time to time, e.g. when we add a new module to the software
- Our changes to default roles will overwrite yours
- Roles you create will not be affected by software updates

<table>
<thead>
<tr>
<th>Name</th>
<th>Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>edit role</td>
</tr>
<tr>
<td>Assessment Author</td>
<td>edit role</td>
</tr>
<tr>
<td>Item Bank Administrator</td>
<td>edit role</td>
</tr>
<tr>
<td>Item Author</td>
<td>edit role</td>
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<td>Monitor</td>
<td>edit role</td>
</tr>
<tr>
<td>Publisher</td>
<td>edit role</td>
</tr>
<tr>
<td>Reporter</td>
<td>edit role</td>
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<tr>
<td>Reviewer</td>
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<td>Test Center Administrator</td>
<td>edit role</td>
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<td>Translation Manager</td>
<td>edit role</td>
</tr>
<tr>
<td>Participant</td>
<td>edit role</td>
</tr>
</tbody>
</table>
You Cannot Edit the Permissions of the Participant Role

- The Participant role is a special role
- When you have it, you are allowed to take assessments
- If you want to give Admin User permissions to a Participant (you can!), give the user an additional role
# Role Delegation

- When you edit the permissions of a role, you can define which roles that role in turn can assign (and remove)
- E.g. if you want to enable users with the Authoring Team Member role to assign the Assessment Author and Item Author roles to users, then:
  - edit the Authoring Team Member role and
  - select the two authoring roles in the Role delegation section

<table>
<thead>
<tr>
<th>Role delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign all roles</td>
</tr>
<tr>
<td>Assign Admin role</td>
</tr>
<tr>
<td>Assign Assessment Author role</td>
</tr>
<tr>
<td>Assign Item Bank Administrator role</td>
</tr>
<tr>
<td>Assign Item Author role</td>
</tr>
<tr>
<td>Assign Monitor role</td>
</tr>
<tr>
<td>Assign Publisher role</td>
</tr>
<tr>
<td>Assign Reporter role</td>
</tr>
<tr>
<td>Assign Reviewer role</td>
</tr>
</tbody>
</table>
Editing the Permissions of a Role

- Open a permission section, e.g. V6 Authoring
Editing the Permissions of a Role

- Add/remove permissions by ticking/unticking them
Assign roles to / Remove roles from users individually and collectively

Learning objective #3
Edit an Individual User

- Tick/untick the roles you want to add/remove

Roles
- [ ] Authenticated User
- [ ] Admin
- [ ] Assessment Author
- [ ] Item Author
- [ ] Item Bank Administrator
- [ ] Monitor
- [ ] My New Role
- [ ] Participant
- [ ] Publisher
- [ ] Reporter
- [ ] Reviewer
- [ ] Role Manager
- [ ] Scheduler
- [ ] Test Center Administrator
- [ ] Translation Manager
Select Multiple Users

- Two users have been selected:
  - demopublisher
  - ella

<table>
<thead>
<tr>
<th>Username</th>
<th>Status</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>demopublisher</td>
<td>active</td>
<td>Publisher</td>
</tr>
<tr>
<td>demoparticipant</td>
<td>active</td>
<td>Participant</td>
</tr>
<tr>
<td>ella</td>
<td>active</td>
<td>Item Bank Administrator, Reporter</td>
</tr>
<tr>
<td>602336</td>
<td>active</td>
<td>Admin</td>
</tr>
</tbody>
</table>
Use the Update Options to Assign or Remove Roles

- E.g. add the Scheduler role to the selected users
What Is Different in NextGen?
Moving Onwards and Upwards

Previous Architecture

User A
- Admin Permissions

User B
- Admin Permissions

Participant
- No Admin Role

NextGen Architecture

Role A
- Permissions

Role B
- Permissions

Participant
- Permissions
NextGen Portal – User Meets Role
NextGen Portal – User Meets Roles

User A
- Administration Role
  - Permissions

User B
- Authoring Role
  - Permissions

User C
- Participant
  - Permissions

User D
- Analytics Role
  - Permissions

User E
Use roles to control access to question and assessment content

Learning objective #4
Assign access to a topic or assessment folder

Content

- **Topics and questions**
  Create and edit topics and questions

- **Assessments**
  Create, edit, and publish assessments

- **Import a Qpack**
  Import a Qpack file

- **Metatags**
  Create and edit metatags

- **Manage access**
  Assign permissions to topics and assessment folders

- **Administration**
  Set default question status

- **Help**
  Authoring help and documentation
Assign access to a topic or assessment folder
Assign access to a topic folder

<table>
<thead>
<tr>
<th>Users</th>
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<tbody>
<tr>
<td>402258</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>sampleperson</td>
<td></td>
<td></td>
</tr>
<tr>
<td>test</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Roles</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Author</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top left: Users
- 402258
- sampleperson
- test

Top right: Roles
- Item Author

Bottom: Options
- Include all sub-items
- Adobe Flash
- Running
- Show
Topic Folder Access

Content

Home » Topics

Topics

Topics

Scrum
Assign access to an assessment folder
Assign access to an assessment folder
Assign access to an assessment folder

<table>
<thead>
<tr>
<th>Topics</th>
<th>Assessments</th>
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<td>April</td>
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