YouTestMe

Workspaces





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1 Introduction

This document explains how to perform UAT for the "**Workspaces**" module that includes the following requirements:

- 1. Req #56 Possibility to create an unlimited number of workspaces
- 2. Req #54 The dashboard for managing workspaces (edit existing workspaces and create new ones)
- 3. Req #58 Introducing the role of a super admin
- 4. Req #59 Allowing the creation of multiple super admins
- 5. Req #64 Allowing super admins to access and compare the individual reports Basic reporting
- 6. Req #60 Introducing the role of a department admin
- 7. Req #63 Enabling department admins to have access to the current full set of standard reports within the workspace scope
- 8. Req #62 Enabling multi-layer creation of custom question properties
- 9. Req #57 Adding a unique workspace identifier into tests
- 10. Req #55 A security layer that allows data separation and permission to access workspaces
- 11. Req #66 Allowing unique logo design and color theme for each workspace
- 12. Req #61 Enabling automatic assignment of user roles
- 13. Req #65 Allowing super admins to access and compare the individual reports Reports that show workspace activity

2 Req #56 - Possibility to create an unlimited number of workspaces

2.1 Pre-conditions

To create a workspace, a user must have the following permission in addition to permissions listed in the chapter 7.1:

• Create new workspace

Note: The "Access workspaces page" permission will be automatically checked.

To manage any workspace in the system, a user must have the following permission in addition to the permissions listed in the chapter 7.1:

• Manage any workspace

<u>Note</u>: The "Access workspaces page" and "Create new workspace" permissions will be automatically checked.

To give the desired permissions to a certain role, you should follow the next steps:

1. Click the "Users" option in the left-side menu, and select the "Roles and permissions" tab.

| | Homepage | | Q | Search anything |
|-----------------------|--|--|--|--|
| A Home | Welcome John Smith, | | | |
| Assignments | Your role is Administrator. Your security role is intended for: | | | Recent activity 276 |
| | - Overseeing the entire system - Configuring system setting | | | Test "Are you an Egyptology Expert?" > 11 minutes ago |
| 🕞 Users 🔺 | - Examining reports As a start, we advise to: | | | Test "Are you an Egyptology Expert?" 12 minutes ago |
| User profiles | Click the Tests option from the main menu Select the Manage tests option | | | Question pool "JM pool" is created |
| User groups | Under the Name column, search for Report Builder Tes Select the Summary report to see overall statistics Select the Report builder to generate your report | st and select it | | Question pool "Demo question pool" > |
| Roles and permissions | 3. Select the Report builder to generate your report | | | |
| My profile | 🗱 My tests | 🧯 New user | ჽ New user group | Question pool "Demo question pool" > |
| 🍓 Tests 🗸 | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | Create a user profile with a pre-created role in accordance with required permissions. | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. | << < 1 2 3 > » |
| | View | Create | Create | 5 🗸 |
| E-testing center | | | | View all activity |
| Surveys | 🔃 New test | 🚏 New training course | 🗓 New survey | |
| Training courses | Create a test with preferred settings and schedule it for the desired time period. | Create a training as a series of lessons organized into steps. Add materials and schedule a test to check the knowledge. | Create a survey with preferred settings and schedule it for the desired time period. | |
| Reporting | Create | Create | Create | |

2. Click the "Edit" option in the action column in a table on the role you want to preview.

| es and per bles an | missions nd permissions | | Q Search anything | 0 0 0 |
|-----------------------|----------------------------|---|--------------------------------|----------------|
| Roles | | | | New role |
| | Name ↑↓ | Description ↑↓ | Role code $\uparrow\downarrow$ | External ID ↑↓ |
| ÷ | Administrator | A role with all permissions in the system that can fully access and manage all application modu | ADM | 10000001 |
| ÷ | Guest | Guest is one of the default user roles in the system. It has only session-level access to the appli | GST | |
| 1 | Instructor | A role with higher-level permissions than a regular user, instructors can manage their groups, qu | INS | 1000002 |
| : | LATCH_PilotSchool_Admin | Department pilot school | elq | |
| Edit raining_Admin | | Department training pilot | ANv | |
| Û | Delete | | xQZ | |



3. Ensure the user has at least "Access workspaces page" and "Create new workspace" permissions, as shown in the image below.

| Roles and permissions / LATCH_PilotSchool_Admin Roles and permissions | | Q Search anything | o 🛛 🗳 📣 - |
|--|--|------------------------|-----------|
| Role Access to predefined reports | | | |
| 47. Access and grade report | When the grader report is enabled, user with this permission can access grader report and grade | the test. | |
| | Permissions - Attachments | | |
| 48. Change attachment availability | Set any attachment to be private or public. Public attachments are available for any test creator. | | |
| 49. Edit public attachment | Access and edit the names and descriptions of all attachments in the system. | | |
| 50. Manage any attachment | Access and edit all your test attachments in the system as well as all private and public attachment | ents from other users. | |
| | Permissions - Workspaces | | |
| 51. Access the 'Workspaces' page | Access the 'Workspaces' page and work with workspace you've created or you are a member of. | | |
| 52. Create a workspace | Create a workspace or edit a personal one. | | |
| 53. Manage any workspace | Create, delete and change any workspace. | | |
| | Permissions - Category | | |
| 54. Access question categories page | Access the page for managing question categories. | | |
| 55. Create a question category | Create a question category. | | |
| 56. Manage any question category | Create, edit or delete any question category. | | |
| Update | | | Q |

2.2 Creating the workspace

To create a workspace, you should follow the next steps:

1. Click the "Workspaces" option in the left side menu, and select the "Manage workspaces" tab.



2. Click the "Create new" button. Provide an optional description and a required unique name. Click the "Save" button, and the workspace should appear in the table.

Workspaces



| | Manage workspaces | | | Q. Search anything |
|------------------------|-----------------------------|-----------------------|---------------------|--------------------|
| • | | | | 1 Create new |
| Assignments 👻 | Name †↓ | | Description ↑↓ | Creation date 🕆 |
| 🖨 Users 👻 | Q. Search Default workspace | Q Search Tr Create | × not categorized). | Sep-27-2022 |
| Workspaces | | Name:* | 10 🗸 | 💼 🚛 Rows: 2 |
| Manage workspaces | | 2 | | |
| Manage workspace roles | | Description: | | |
| 🍓 Tests 🔹 👻 | | 3 | | |
| E-testing center + | | 4 Save C | ancel | |
| Surveys 👻 | | | | |
| Training courses | | | | |
| Reporting 👻 | | | | |
| 🗘 System 👻 | | | | 0 |

3. The created workspace will be presented in the table.

| | Manage | workspaces | Q Search anything | 0 e 📮 🍕 • |
|-------------------|--------|-------------------|---|------------------|
| A Home | Worksp | | Create new | |
| Assignments 🗸 | | Name ↑↓ | Description ↑↓ | Creation date ↑↓ |
| | | Q Search | Q. Search | |
| Users 👻 | | Default workspace | This workspace is assigned to entities if none is chosen (entity is not categorized). | Sep-27-2022 |
| Workspaces | ÷ | Admin's workspace | This workspace will be used for presenting the feature. | Sep-27-2022 |
| Manage workspaces | | | ≪ < 1 > ≫ 10 ∨ | real Rows: 2 |

Note: You can create as many workspaces as needed by repeating the above steps.

| or youtestm | ne tified | Manage | workspaces | Q Search anythin | ng 💿 😧 💭 🗸 v |
|------------------------|--------------|---------|-------------------------|--|------------------|
| A Home | | Workspa | ce information | | Create new |
| Assignments | . | | Name 11 | Description 11 | Creation date 11 |
| | | | Q. Default workspace | Q. This workspace is assigned to entities if none is chosen (entity is not categorised). | Sep-28-2022 |
| Subsers | * | 1 | Workspace 1 | | Oct-03-2022 |
| Workspaces | | | Workspace 2 | | Oct-03-2022 |
| | | E. | Workspace 3 | | Oct-03-2022 |
| Manage workspaces | | 1 | Workspace 4 | | Oct-03-2022 |
| Manage workspace roles | | ÷. | Workspace 5 | | Oct-03-2022 |
| | | - E | Workspace 6 | | Oct-03-2022 |
| Tests | * | 1 E - | Workspace 7 | | Oct-03-2022 |
| E-testing center | . | ÷ | Workspace 8 | | Oct-03-2022 |
| E testing center | | ÷ | Workspace 9 | | Oct-03-2022 |
| Surveys | * | | | << < 1 2 > >> 10 v | 🤹 🤹 Rows: 11 |
| | | | | | |
| Training courses | * | | | | |
| Reporting | * | | | | |
| 🔯 System | • | | | | 0 |
| | | | | | |

3 Req #54 - The dashboard for managing workspaces (edit existing workspaces and create new ones)

3.1 Pre-conditions

3.1.1 Editing "own" workspaces

A user must have the following permission:

• "Create new workspace"

After creating a workspace, they become its manager. This means that they will be able to edit it.

3.1.2 Editing workspaces for which the user is assigned as manager

A user must have the following permission:

• "Create new workspace"

Even though the user did not create a certain workspace, they will be able to edit it if they are assigned as managers of that workspace.

3.1.3 Editing any workspace in the system

A user must have the following permission:

• "Manage any workspace"

This global permission allows the user to manage any workspace in the system.

3.2 Managing a workspace

For an already created workspace, its manager can perform two actions:

- 1. Editing
- 2. Removing

| | e | Manage | workspaces | Q Search anythi | ng 💿 💽 💭 🗸 |
|-------------------|----------|--------|-------------------|---|-----------------|
| A Home | | Worksp | ace information | | Create new |
| Assignments | . | | Name ↑↓ | Description †↓ | Creation date 👈 |
| | | | Q | ٩ | |
| Subsers | * | - E - | Default workspace | This workspace is assigned to entities if none is chosen (entity is not categorized). | Sep-27-2022 |
| Workspaces | | ÷ | Admin's workspace | This workspace will be used for presenting the feature. | Sep-27-2022 |
| Manage workspaces | | | | ≪ < 1 > >> 10 ∨ | 💼 🍇 Rows: 2 |

Once you click on edit, you will access the following tabs:

- 1. **Information** In this tab, the user can change the following items: name, description, theme, logo, and favicon.
- 2. Workspace members In this tab, the user can define a membership rule where all users with the specified role are automatically mapped as workspace members.
- 3. **Users** In this tab, the user will be able to assign other users to this workspace and specify their roles.



Workspaces

| | Manage workspaces 7 Admin's Manage workspaces | | |
|---------------------------------|--|-----------------------------|--------|
| Getternined | Information Workspace | | |
| A Home | | | |
| Assignments 👻 | Workspace ID: | Name:* | |
| Assignments + | 10000 | Admin's workspace | |
| Users 👻 | Description: | | |
| Workspaces | This workspace will be used | for presenting the feature. | |
| | Theme: | | ٢ |
| 🚡 Tests 🔺 | Select one | | ~ |
| New test | Logo: ① | | |
| Manage tests | | | |
| manage (coto | Add logo | | |
| Manage certificates | Favicon: ① | | |
| Question pools | Add favicon | | |
| Grading scales | Created by: | Creation date: | |
| | admin | Sep-27-2022 07:42 | AM EDT |
| Ouestion categories | | | |

Note: After the change is made, the user should see a notification about a successful update, and the change should be immediately visible in the fields and the data table.

4 Req #58 - Introducing the role of a super admin

Super admin is a user with the default role in the system named "Administrator". Super admin has all permissions in the system and can fully access and manage all application modules, including all workspaces.

| | Roles and per Roles ar | missions nd permissions | Q Search anything | 2 Q 🖡 🎒 🚱 v | | | |
|-----------------------|---------------------------|----------------------------|--|--------------|----------------|--|--|
| Roles | | | | | | | |
| Assignments 👻 | | Name ↑↓ | Description ↑↓ | Role code ↑↓ | External ID 10 | | |
| | ÷ | Administrator | Your security role is intended for: - Overseeing the entire system - Configuring system setting - E | ADM | 10000001 | | |
| 😩 Users 🔺 | ÷ | Grader | You can see and manage only user groups in which you are assigned as a group manager and $g_{\!-\!}$ | qOp | 1000006 | | |
| User profiles | ÷. | Guest | You have session-level access to the application. After the session expires or you sign out, your $_$ | GST | | | |
| User groups | ÷ | Instructor | Your security role is intended for: - Creating and managing tests, surveys, and training courses A., | INS | 1000002 | | |
| Roles and permissions | 1 | Proctor | Your security role is intended for: - Monitoring test attempts in real-time - Reviewing proctoring r | PRC | 1000003 | | |
| | ÷ | Question Pool Manager | You can create different types of questions and organize them within new or existing question p | QMN | 1000004 | | |
| My profile | 1 | Student | Your security role is intended for: - Taking tests - Attending training courses - Participating in sur | ATT | 10000005 | | |
| Workspaces | ≣ Displ | ayed columns | << < 1 > >> 10 v | | 👛 🧧 Rows: 7 | | |
| Tests | | | | | | | |

5 Req #59 - Allowing the creation of multiple super admins

The user can create multiple users with the "Administrator" role. To create super admin users, you must have the following permissions:

- 1. Grant roles to users
- 2. Access the "**Profiles**" page
- 3. View a list of all users



- 4. Create new users
- 5. View any user's personal information

| | Roles and permissions / Users creator Roles and permissions | Q Search anything 💿 😥 📭 🧔 🗸 |
|-----------------------|--|--|
| A Home | Role Access to predefined reports | |
| Assignments | 1. Log in | Access the application using your unique oredentials. |
| Coolymenta | 2. Manage a role | Create, edit or delete a role. |
| 👶 Users 🔺 | 3. Grant roles to users | Change other user's roles on their personal profile pages. |
| User profiles | 4. Manage subscriptions | Manage subscribers. Create, edit or delete subscriptions. |
| User groups | 5. Manage system settings | View and manage system aettings page. |
| oser groups | 6. Access the 'Profiles' page | Access the page for managing user's accounts. |
| Roles and permissions | 7. View a list of all users | Keep track of all users using 'List of all users' on 'Profiles' page. |
| My profile | 8. Manage user's status | Change user's status (activate, lock, suspend or delete). |
| | 9. Export users to Excel | Export list of users as an Excel table on 'Profiles' page. |
| Workspaces * | 10. View deleted users | Keep track of deleted users using 'List of all users' on 'Profiles' page. |
| 🐚 Tests 👻 | 11. Manage registration requests | Manage registration requests (approve or decline). |
| E-testing center | 212. Create new users | Create new users through application or load them from excel file. Grant roles permission is required for setting the role other than 'Student'. 'Change user's status' permission is required for setting status other than 'Active'. |
| E Crating Gener | 13. View any user's personal information | View any user profile and its basic information (note that users can always view profiles they created, regardless of this permission) |
| 🗉 Surveys 👻 | 14. Change your personal information | Change personal information (basic information details and contact information). |
| | 15. Change other user's personal information | Change other user's personal information (basic personal information and contact information). |
| Training courses | 16. Change your password | Change your password on your personal profile page. |

5.1 Creating super admin users

To create super admin users, follow the next steps:

1. Click the "Users" option in the left-side menu and select "User profiles".

| | Homepage | € €<!--</th--> |
|-----------------|---|--|
| home | Welcome Joshua Valencia, Your role is Users creator. | Recent activity |
| 🛃 Assignments 👻 | | No recent activity. |
| 🐣 Users 🔺 | | ≪ < > ≫ 5 ♥ |
| User profiles | | View all activity |
| My profile | | |

2. In the "Create new user" tab, enter the required fields and select the role "Administrator". Click the "Save" button.



Workspaces

| | User profiles | Q, Search anything |
|-------------------|--|--------------------|
| A Home | Utst of all users in users or eached by me Desets new user | |
| 🔀 Assignments 🔍 👻 | Application credentials | Zesic info only |
| at Users 🔹 | Consense* Passed* | |
| User profiles | See passed Cerfor passed | |
| Myprofile | Passord appetro das. Silve* | |
| | American Report of Net Control | |
| | Une refusif | |
| | Adhe v | |
| | Trev strek | |
| | Leguça hitege 0 Leguça hiteset 0 | |
| | Bulan v Bolan v | |
| | Personal information | |
| | Fotome* Latiners* | |
| | Eve() | |
| | | |
| | Sine Canal | |

<u>Note</u>: Repeat the previous steps to create as many users with the super admin role as you need. Users with this role will be able to see and manage data from all workspaces and configure system parameters.

6 Req #64 - Allowing super admins to access and compare the individual reports - Basic reporting

Super admin can fully access and manage all application modules, including reports. To access the reports module, follow the next steps:

- 1. Click the "**Reporting**" option in the left side menu.
- 2. Select the "Predefined reports" item.

| | Homepage | | | Q Search anything |
|----------------------|--|---|---|--|
| A Home | Welcome John Smith, Your role is Administrator. | | | Recent activity 💷 |
| Assignments 👻 | Your security role is intended for: - Overseeing the entire system - Configuring system setting | | | Certificate 'Certificate of Completion' i > 30 days ago |
| 🕒 Users 👻 | - Examining reports As a start, we advise to: | | | Test "Banking - Certification Exam" is fi > 30 days ago |
| Workspaces * | Click the Tests option from the main menu Select the Manage tests option Under the Name column, search for Report Builder Test a | nd select it | | Test 'Banking - Certification Exam' is st 30 days ago |
| Tests 🗸 | Select the Summary report to see overall statistics Select the Report builder to generate your report | | | Certificate "Certificate of Completion" i > 30 days ago |
| 🕑 E-testing center 🔻 | My tests | SNew user | 🏅 New user group | Test "Quick Quiz - Cryptocurrency" is fin > 30 days ago |
| Surveys 👻 | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | Create a user profile with a pre-created role in accordance with required permissions. Create | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. Create | << < 1 2 3 > >> 5 • View all activity |
| Training courses | | | | |
| Reporting | New test Create a test with preferred settings and schedule it for the desired time period. | New training course Create a training as a series of lessons organized into steps. Add materials and schedule a test to check the knowledge. | New survey Create a survey with preferred settings and schedule it f the desired time period. | lor |
| Predefined reports | Create | Creste | Create | |

<u>Note</u>: The super admin will see all available reports in the system and access them by clicking on their name.



| redefined reports | | | | | | Q. Search anything | • |
|-------------------------------|-----------------|---------------------------------|-----------------|--|-----------------|--------------------|----------|
| porta for verious categories. | | | | | | | |
| User reports (26) | View all | Test reports (7) | <u>View all</u> | Survey reports (3) | View all | | |
| Administrators: | 14 | Number of published tests: | 61 | Number of published surveys: | 2 | | |
| Instructors: | 7 | Number of suspended tests: | 0 | Number of suspended surveys: | 1 | | |
| Students: | 591 | Number of draft tests: | ٥ | Number of draft surveys: | ٥ | | |
| Others: | 19 | | | | | | |
| User groups reports (1) | <u>View all</u> | Test question pools reports (2) | <u>View all</u> | Survey question pools reports (1) | View all | | |
| Active groups: | 33 | Number of test question pools: | 75 | Number of survey question pools: | 8 | | |
| Inactive groups: | 0 | | | | | | |
| Training course reports (3) | <u>View all</u> | Question reports (4) | <u>View all</u> | Overall statistics (2) | <u>View all</u> | | |
| Number of training courses: | 5 | Number of test questions: | 1812 | General Information about the other eight categories. | | | |
| Number of managers: | 7 | | | Create unique statistics reports with statistics report builder. | | | |
| Number of candidates: | 37 | | | | | | |
| | | | | | | | |
| Usage reports (5) | View all | | | | | | |
| Total registered users: | 630 | | | | | | |
| Total active users: | 145 | | | | | | |
| Total test attempts: | 245 | | | | | | |
| Total proctoring hours: | 00h:26m | | | | | | |

7 Req #60 - Introducing the role of a department admin

Workspace admin is a user role that allows the user to manage a workspace and all its entities, such as tests, surveys, training courses, question pools, question categories, users, reports, etc.

The user with the necessary permissions for managing the workspace will be assigned as a workspace admin once they become a member of that workspace.

There are two ways for a user to become a workspace admin:

- 1. By the **global role**.
- 2. By the **identifier**.

7.1 Creating a global role

Before assigning members, the user must create a global role *suitable* for the workspace admin role.

<u>Note</u>: The *suitable* role refers to a role with all permissions necessary to access entities not affected by the workspaces. For example, attachments are not affected by the workspaces, and therefore the workspace admin must have a global role with the "Manage any attachment" permission and NOT the "Manage any test, survey or training" permission.

The user must have the "Manage a role" permission to create a global role.



| | Roles and permissions / Users creator Roles and permissions | | |
|-----------------------|--|--|--|
| home | Role Access to predefined reports | | |
| Assignments 👻 | | | |
| 🔐 Users 🔺 | Default welcome page: | 0 | |
| User profiles | Select one | ~ | |
| User groups | Role grantable ① | | |
| Roles and permissions | Users with this role will be publicly available. | Permissions - User | |
| My profile | 1. Log in | Access the application using your unique credentials. | |
| Workspaces | 2. Manage a role | Create, edit or delete a role. | |
| 🐚 Tests 💌 | 3. Grant roles to users | Change other user's roles on their personal profile pages. | |
| 10010 | 4. Manage subscriptions | Manage subscribers. Create, edit or delete subscriptions. | |
| E-testing center 🔹 | 5. Manage system settings | View and manage system settings page. | |

To create a global role for the workspace admin, follow the next steps:

1. Click the "Users" option in the left-side menu, and select "Roles and permissions".



2. Click the "New role" option.



Workspaces

| | Roles and per Roles and | missions nd permissions | Q Search anything | 0 0 🔎 🦃 | |
|-----------------------|----------------------------|----------------------------|---|--------------|----------------|
| A Home | Roles | | | | New role |
| Assignments 👻 | | Name ↑↓ | Description ↑↓ | Role code ↑↓ | External ID ↑↓ |
| | ÷ | Administrator | Your security role is intended for: - Overseeing the entire system - Configuring system setting - E | ADM | 10000001 |
| 🔐 Users 🔺 | | Grader | You can see and manage only user groups in which you are assigned as a group manager and \ensuremath{g} | qOp | 10000006 |
| User profiles | ÷ | Guest | You have session-level access to the application. After the session expires or you sign out, your $_$ | GST | |
| User groups | 1 | Instructor | Your security role is intended for: - Creating and managing tests, surveys, and training courses A | INS | 1000002 |
| Roles and permissions | ÷ 1 | Proctor | Your security role is intended for: - Monitoring test attempts in real-time - Reviewing proctoring r | PRC | 1000003 |
| | | Question Pool Manager | You can create different types of questions and organize them within new or existing question p | QMN | 10000004 |
| My profile | ÷ | Student | Your security role is intended for: - Taking tests - Attending training courses - Participating in sur | ATT | 10000005 |
| ⊕ Workspaces ▼ | | Users creator | | zmG | |
| 🐚 Tests 🗸 👻 | E Displayed columns | | | | |
| - | | | | | |

- 3. Enter a name and select the following permissions:
 - Manage a role
 - Manage subscriptions
 - Manage system settings
 - Access the 'Profiles' page
 - Export users to Excel
 - Manage registration requests
 - Change your personal information
 - Change your password
 - Access the 'My groups' section
 - Access the 'My pools' section
 - Access the 'My certificates' section
 - Access the 'My activity log' section
 - Access the 'My subscribers' section
 - Access the 'Groups' page
 - Access the 'Pools' page
 - Page access for Tests, surveys and training courses
 - Fully manage your tests and surveys
 - View questions
 - Create a test template
 - Set a test template to be public
 - View and manage 'Test results verification' page
 - View all accommodations
 - Manage accommodations
 - Manage quiz authorizations
 - Respond to accommodation requests
 - Access and grade report
 - Change attachment availability



- Edit public attachment
- Manage any attachment
- Access the 'Workspaces' page
- Access question categories page

7.2 Creating a workspace role

A workspace role will give the user required permissions for workspace entities when one becomes its member.

The user must have the "**Manage any workspace**" permission to access the workspace roles page and manage workspace roles.

To create a workspace role, follow the next steps:

1. Click the "Workspaces" option in the left side menu, and select "Manage workspace roles".



2. Click the "Create new" option.

| | Manage workspace roles | | | Q Search anything 💿 😥 📮 🌍 🗸 |
|------------------------|------------------------|---------|----------------|-----------------------------|
| A Home | Workspace | roles | | Create new |
| Assignments 🗸 | | Name ↑↓ | Description ↑↓ | External ID 11 |
| | | ٩ | ۹ | ٩ |
| 🐝 Users 👻 | | | ≪ < 1 > ≫ 10 ∨ | Rows: 3 |
| Workspaces | | | | |
| Manage workspaces | | | | |
| Manage workspace roles | | | | |

3. Enter the name and click the "Select all" checkbox to select all the permissions.



Workspaces

| or youtestm | | Workspace roles Manage workspace roles | Q Search anything 🕢 😥 🚔 🧔 🗸 |
|------------------------|---|---|--|
| A Home | | Role name.* | |
| Assignments | Ŧ | | |
| Users | * | External ID: | © |
| Workspaces | • | Role description: | |
| Manage workspaces | | | |
| Manage workspace roles | | Select all | Permissions - Workspaces |
| Sector Tests | * | Manage workspaces | Manage workspaces you are assigned to. |
| E-testing center | * | | Permissions - Tests, Surveys, Training courses |
| Surveys | Ŧ | Create new test | Create tests, surveys, or training courses. |
| Training courses | Ŧ | Manage any test | Edit test description, send, suspend or delete a test. Manage questions and certificates. Manage candidates, managers, and steps in training courses. Manage candidates, questions, and profiling in surveys. |
| Reporting | ¥ | Fully manage tests | In tests and surveys where you are assigned as manager edit information, adjust the availability, change settings, assign any user from the system and see detailed reports. |
| 🗴 System | - | View questions | Access the questions and their settings through tests and surveys you manage. |
| | « | Assign group members | Assign members of groups you manage to tests or surveys and monitor their results. |

4. Scroll down and click the "Save" button.

| | Workspace roles Manage workspace roles | Q Search anything 💿 😥 📮 🌍 🗸 | | | |
|------------------------|--|--|--|--|--|
| f Home | Create new user Create new | and on boor mony our monspace. sers in your workspace through the application or load them from an Excel file. Grant roles' permission is required for setting a role other . 'Change user's status' permission is required for setting a status other than Active'. | | | |
| Assignments 👻 | View all users Keep track of | all users from your workspace. | | | |
| 🕒 Users 👻 | View deleted users Keep track of | deleted users from your workspace. | | | |
| Workspaces | View works | ce users' profiles and their basic information. Note that users can always view profiles they created, regardless of this permission. | | | |
| | Change other user's personal information Change other | user's personal information (basic personal information and contact information). | | | |
| Manage workspaces | Manage workspaces Change other user's password Change the password of users in your workspace. | | | | |
| Manage workspace roles | | Permissions - Groups | | | |
| 🐚 Tests 🔻 | View all groups View basic i | formation about each of the groups. | | | |
| | Manage any group Edit basic in | ormation, members, or connections with other groups. | | | |
| E-testing center | Create new group Create a gro | p, automatically becoming its manager. | | | |
| Surveys | | Permissions - Question categories | | | |
| Training courses ▼ | Create a question category Create a que | tion category in your workspace. | | | |
| | Manage any question category Create, edit | r delete any question category in your workspace. | | | |
| Reporting 👻 | Save Cancel | | | | |
| System 🔍 | | | | | |

7.3 Assign a member by the global role

To assign a new member to a workspace, a user that is a workspace manager should follow the next steps:

1. Click the "Workspaces" option in the left side menu, and select the "Manage workspaces" item.



| | Homepage | 🔍 Search anything 💿 😥 🚔 🚳 🗸 |
|------------------------|--|---|
| A Home | Welcome John Smith, | |
| | Your role is Administrator. | Recent activity 20 |
| Assignments 👻 | Your security role is intended for: - Overseeing the entire system - Configuring system setting | Gertificate "Certificate of Completion > |
| 🕒 Users 👻 | - Examining reports As a start, we advise to: | Test 'Banking - Certification Exam' i > |
| Workspaces | 1. Click the Tests option from the main menu 2. Select the Manage tests option | Test "Banking - Certification Exam" L. 30 days app |
| Manage workspaces | 3. Under the Name column, search for Report Builder Test and select it 4. Select the Summary report to see overall statistics 5. Select the Report builder to generate your report | Q Certificate "Certificate of Completion |
| Manage workspace roles | | Ju daya agu |

2. On the desired workspace, click on the "Edit" from the "Actions" column.

| | Manage w | Manage workspaces Q Search anything | | | |
|------------------------|----------|-------------------------------------|---|------------------------------------|--|
| A Home | Workspa | ace information | | Create new | |
| Assignments 👻 | | Name 斗 | Description 11 | Creation date $\uparrow\downarrow$ | |
| 🔮 Users 👻 | ÷ | Q Default workspace | Q. This workspace is assigned to entities if none is chosen (entity is not categorised). | Sep-28-2022 | |
| Workspaces | ÷ | Workspace 1 | | Oct-03-2022 | |
| Manage workspaces | ÷ | Workspace 2 | | Oct-03-2022 | |
| | 1 | Workspace 3 | | Oct-03-2022 | |
| Manage workspace roles | 1 | Workspace 4 | | Oct-03-2022 | |
| Tests 👻 | ÷ | Workspace 5 | | Oct-03-2022 | |
| - | 1 | Workspace 6 | | Oct-03-2022 | |
| E-testing center | ÷ | Workspace 7 | | Oct-03-2022 | |
| 🔲 Surveys 👻 | ÷ | Workspace 8 | | Oct-03-2022 | |
| Training courses | ÷ | Workspace 9 | | Oct-03-2022 | |
| Reporting | | | ≪ < 1 2 > ≫ 10 ∨ | 🤹 🐔 Rows: 11 | |

3. On the "Workspace members" tab, click the "Assign" button.

| | Manage workspaces / Manage workspaces / Manage worksp | Q. Search anything | | |
|------------------------|---|--------------------------------|---|------------|
| A Home | | | |) |
| Assignments 👻 | Workspace me | embers | | Assign |
| | | Role name $\uparrow\downarrow$ | Workspace role name $~\uparrow\downarrow$ | Created †↓ |
| Users 👻 | | Q | Q | |
| Workspaces | | | << < 1 > ≫ 10 ♥ | Rows: 1 |
| Manage workspaces | | | | |
| Manage workspace roles | | | | |

4. Select the user (global) role and workspace role.



Assign members

 \times

Assign new members to a workspace by linking their role to a workspace role. For example, by selecting the role "Instructor" and workspace role "Workspace Instructor", all users in the system with the role "Instructor" will become members of the workspace with workspace role "Workspace Instructor". The selected workspace role will grant users permissions of that workspace role.

| User's role:* | 0 |
|--|---|
| LATCH_PilotSchool_Admin | ~ |
| Workspace role:* | C |
| Workspace admin | ~ |
| Save Cancel | |
| . Click the " Save " button. | |
| | |
| Assign members | × |
| Assign new members to a workspace by linking their role to a workspace role. For example, by select workspace role "Workspace Instructor", all users in the system with the role "Instructor" will become | ting the role "Instructor" and members of the workspace with |
| Assign new members to a workspace by linking their role to a workspace role. For example, by select workspace role "Workspace Instructor", all users in the system with the role "Instructor" will become workspace role "Workspace Instructor". The selected workspace role will grant users permissions of | ting the role "Instructor" and members of the workspace with |
| Assign new members to a workspace by linking their role to a workspace role. For example, by select workspace role "Workspace Instructor", all users in the system with the role "Instructor" will become workspace role "Workspace Instructor". The selected workspace role will grant users permissions of | ting the role "Instructor" and members of the workspace with that workspace role. |
| Assign members Assign new members to a workspace by linking their role to a workspace role. For example, by select workspace role "Workspace Instructor", all users in the system with the role "Instructor" will become workspace role "Workspace Instructor". The selected workspace role will grant users permissions of User's role:* LATCH_PilotSchool_Admin Workspace role:* | ting the role "Instructor" and members of the workspace with that workspace role. |

Note: Once the membership is created, all the users with the selected user role will be assigned within the workspace with the specified role.

Click the **"Remove"** button in the action column to remove a member.



| | Manage workspaces / Workspace 1 Manage workspaces Information Workspace members Users | | | | | | |
|-------|---|-------------------------|---|------------------------------|--|--|--|
| Works | pace me | mbers | | Assign | | | |
| | | Role name 11 | Workspace role name $~\uparrow\downarrow$ | Created $\uparrow\downarrow$ | | | |
| | | ۹ | ٩ | | | | |
| 4 | | LATCH_PilotSchool_Admin | Workspace admin | Oct-04-2022 | | | |
| | 1 Remov | | << 1 > » 10 ¥ | Rows: 1 | | | |

7.4 Assign a member by the identifier

To assign a new member to a workspace, the workspace manager user should follow the next steps:

1. Click the "Workspaces" option in the left side menu and select the "Manage workspaces" item.

| | | Homepage | Q Search anything 💿 😥 📫 🌍 🗸 |
|-------------------|---|--|--|
| n Home | | Welcome John Smith, | |
| | | Your role is Administrator. | Recent activity 💴 |
| Assignments | * | Your security role is intended for: - Overseeing the entite system - Oroffiguing system setting | Certificate "Certificate of Completion > So days app |
| Users | Ŧ | - Examining reports | Test "Banking - Certification Exam" i > |
| Workspaces | ^ | As a start, we advise to: 1. Click the Tests option from the main menu 2. Select the Manage tests option 3. Under the Name column, search for Report Builder Test and select it | Banking - Certification Exam' i |
| Manage workspaces | | Select the Summary report to see overall statistics Select the Report builder to generate your report | Certificate "Certificate of Completion > 30 days ago |

2. Select the desired workspace and enter it by clicking on its row.

| | | Manage w | Q Search anything | | |
|------------------------|---|----------|-------------------|---|-------------------------------------|
| A Home | | Workspa | ce information | | Create new |
| Assignments | - | | Name 14 | Description 14 | Creation date $\uparrow \downarrow$ |
| | | | ۹ | Q, | |
| Users Users | Ť | ÷ | Default workspace | This workspace is assigned to entities if none is chosen (entity is not categorised). | Sep-28-2022 |
| Workspaces | - | 1 | Workspace 1 | | Oct-03-2022 |
| Manage workspaces | | 1 | Workspace 2 | | Oct-03-2022 |
| Manage workspaces | | 1 | Workspace 3 | | Oct-03-2022 |
| Manage workspace roles | | 1 | Workspace 4 | | Oct-03-2022 |
| Tests | Ŧ | 1 | Workspace 5 | | Oct-03-2022 |
| E-testing center | ÷ | 1 | Workspace 6 | | Oct-03-2022 |
| E-testing center | • | 1 | Workspace 7 | | Oct-03-2022 |
| Surveys | * | 1 | Workspace 8 | | Oct-03-2022 |
| Training courses | • | ÷ | Workspace 9 | | Oct-03-2022 |
| Reporting | ÷ | | | ≪ < 1 2 > ≫ 10 ∨ | 📥 🕵 Rows: 11 |

3. In the "Users" tab, you will be presented with all workspace members with these origins: Inherited (for users assigned by the role) and Local (for users assigned by the identifier).



| Aanage workspaces / Workspace 1 Manage workspaces formation Workspace members Users |] | | Q. Search anythir | ig 🛛 🛛 😥 📮 👰 |
|---|---------------------------------|--|-------------------|------------------------------------|
| Workspace members | | | All users w | ith access Local workspace members |
| Username $\uparrow\downarrow$ | Role name $~\uparrow\downarrow$ | Workspace role name $\uparrow\downarrow$ | Origin ↑↓ | Creation date $\uparrow\downarrow$ |
| Q. Search | ۹ | ٩ | Q | |
| Abadvionand | LATCH_PilotSchool_Admin | Workspace admin | Inherited | Oct-04-2022 |
| Abled1997 | Student | Workspace admin | Local | Oct-04-2022 |
| Accon1956 | Student | Workspace admin | Local | Oct-04-2022 |
| & Acessier | Student | Workspace admin | Local | Oct-04-2022 |
| Acesturod | Student | Workspace admin | Local | Oct-04-2022 |
| Acrew1969 | Student | Workspace admin | Local | Oct-04-2022 |
| Actat1963 | Student | Workspace admin | Local | Oct-04-2022 |
| 🜒 adam | Student | Workspace admin | Local | Oct-04-2022 |
| Adam | Super admin creator | Workspace admin | Local | Oct-04-2022 |
| | | << 1 > >> 10 ¥ | | Rows |

4. Select the "Local workspace members" button and click the "Assign" button.

| | rorkspaces | | Q. Searc | ch anything 👔 👔 🎑 🗸 | | | | | |
|-------------|--|--------------------------------|---|-------------------------------------|--|--|--|--|--|
| Information | Workspace members Users | | | | | | | | |
| Workspa | Workspace members 2 1 Kasign All users with access Local workspace members | | | | | | | | |
| | Username ↑↓ | Role name $\uparrow\downarrow$ | Workspace role name $~\uparrow\downarrow$ | Creation date $~\uparrow\downarrow$ | | | | | |
| | Q. Search | ۹ | ۹ | | | | | | |
| | Abled1997 | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Accon1956 | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Acessier | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Acesturod | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Acrew1969 | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Actat1963 | Student | Workspace admin | Oct-04-2022 | | | | | |
| | 🕘 adam | Student | Workspace admin | Oct-04-2022 | | | | | |
| | Adam | Super admin creator | Workspace admin | Oct-04-2022 | | | | | |
| | | | | | | | | | |

5. A dialog should appear with the list of users you can manage. Select which users will become members of the workspace and click the "**Save**" button.



| mation | Workspace members User | | elect users | | | | × | | |
|--------|------------------------|--------|-----------------------------------|---------------------------|-------------------------------|---------------------------|---------------|--------------------------|--|
| /orksp | ace members | Sele | ct the users you want to assign b | o the workspace. Chosen u | users will receive permission | s of the selected workspa | te role. | Assign All users with ac | cess Local workspace members |
| | Userna | n Sele | ct the workspace role:* | | | | ③ a role name | | Creation date $ \uparrow\downarrow\rangle$ |
| | Q Search | R | tole 1 | | | | ~ | | |
| | Abled1997 | | Username ↑↓ | First name 👈 | Last name 👈 | Status ↑↓ | Email | | Oct-04-2022 |
| | Accon1956 | | Q, Search | Q, Search | Q, Search | Select one ~ | Q. Search | | Oct-04-2022 |
| | & Acessier | 0 | 29123 | John | Baird | Active | noreply@you' | | Oct-04-2022 |
| | Acesturod | | A 304 | | | Active | noreply@you: | | Oct-04-2022 |
| | O Acrew1969 | | 🙆 307 | Ramshan | Sandirakumar | Active | noreply@you! | | Oct-04-2022 |
| | 🔇 Actat1963 | | a 313 | Stefano | D'Aquino | Active | noreply@you' | | Oct-04-2022 |
| | 🛞 adam | | 8 316 | Adis | Dijab | Active | noreply@you: | | Oct-04-2022 |
| | 🚺 Adam | | 🙆 6 | Ernst | Huber | Active | noreply@you: | | Oct-04-2022 |
| | | | 🕒 aaron | Aaron | Thompson | Active | noreply@you: | | Ro |
| | | | Robled 1959 | Rey | Averill | Active | noreply@you: | | |
| | | | [| << < 1 2 | 3 4 5 > | ≫ 8 ❤ | Rows: 669 | | |
| | | | | Confirm | n Cancel | | | | |

7.5 Confirmation that requirement is met

The user must be the workspace manager to proceed. In the "**Users**" tab, you should check if you can see the user in "**All users with access view**".

Then, proceed to the next chapters to confirm that the workspace admin can manage all the entities in assigned workspace.

Workspace assignment is required for the following entities: tests, surveys, user groups, question pools and training courses. All entities are assigned to a predefined workspace named "Default workspace". Workspace assignment is not required for question categories and users. Entities can be reassigned to other



| f Home | | Settings | Testing sessions | Candidates | Monitoring | Questions | Grading configuration | Report builde |
|---------------------|---|-----------------|------------------|-------------|--------------------|----------------------|---------------------------------|---------------|
| Home | | Personal repo | ort settings | This is | a practice exam w | vith a passing ma | ark of 0%, and its purpose is s | |
| Assignments | • | Score report s | settings | Add acknow | wledgment message: | | | 0 |
| Users | • | Language pre | eference | I under | stand and agree w | vith the instruction | ons and rules of this assignmen | t |
| | | 3 | | Creation ty | pe: | | | |
| Workspaces | * | Attachments | | Genera | ated | | | |
| 向 Tests | • | External attrib | butes | Test versio | ns: | | | |
| New test | | Delivery prefe | erence | Dynam | ically generated 6 | | | |
| Manage tests | | | | Belongs to | training: | | | 0 |
| | | | | Trainin | g | | | |
| Manage certificates | | | | Workspace | y. | | | 0 |
| Question pools | | | | | t workspace | | | ~ |
| Grading scales | | | | Created by | : | | Creation date: | |
| Question categories | | | | admin | | | Sep-07-2022 11:13 AM EDT | |
| | | | | Updated by | r. | | Update time: | |
| E-testing center | • | | | admin | | | Sep-07-2022 11:56 AM EDT | |
| Surveys | - | | | | | | | |

workspaces by changing the workspace in the drop down menu found in the information section.

The workspaces a user can see depend on the user's permissions. To reassign a test, a user with the **"Create new test"** workspace role permission can place the test only in the workspaces where said user has permissions. If the user has the global **"Create new test"** permission, he can place the test in any workspace. The same applies for other entities. **Users** are the exception. User assignment on workspaces is managed in the desired workspace as mentioned in the previous chapters.

Follow the next steps implementation meets the requirement:

7.5.1 Tests

Make sure the workspace admin has the required permissions (mentioned before), or at least the **"Access test page"** permission.

When the workspace admin opens the list of all tests, it should be empty if there are no tests in the workspaces he is a member of.



| - | All tests (0) Manage tests | | | Import data | • Q Search | anything | Q 🔎 🌒 v | |
|--------|----------------------------|-----------------|-------------------|-------------|---------------|------------------------------------|-----------|--|
| ń | All tests | | | | | | | |
| 8 | Name †↓ | Creation date 👔 | Status ↑↓ | ID ↑↓ | External ID 1 | Creation type $\uparrow\downarrow$ | Proctored | |
| | Q Search | | Select one \sim | Q Search | Q Search | Select one \sim | | |
| T | | | | | | | | |
| | No tests created. | | | | | | | |
| _ | ≣ Displayed columns | | << | < > >> 10 • | • | 4 | Rows: 0 | |
| × » | | | | | | | 0 | |

The workspace admin can create a new test in the workspaces he belongs to, or the super admin can help by reassigning the tests outside of workspace admin's scope.

7.5.1.1 Reassigning a test

To reassign a test, make sure you have the required permission to do so. To reassign any test, the **"Manage any test, survey or training"** permission is required to open and manage it. To reassign a particular test, you must be a test manager. Therefore, this action depends on two conditions: opening the test and managing it.

Follow these steps to proceed with reassigning:

1. Click the "**Tests**" option in the left side menu.

2. Select the "Manage tests" item.

| | All tests (61) / Banking - Certificat Manage tests | .ion Exam |
|---------------------|--|---|
| f Home | Settings Testing sessions C | Candidates Monitoring Questions Grading configuration Report builder Summ |
| Assignments | Report settings | Banking - Certification Exam |
| | Pause and repeat settings | Test description: |
| Users 🔻 | Security settings | This is a certification exam to check your knowledge on the topic - Banking. It contains questions related to all of the steps of the Banking Training Course. |
| Workspaces | Result validity settings | Label: 3 |
| Tests | Certificate | |
| New test | Personal report settings | Add test instructions: This is an official exam. If you pass it, you will receive the certificate of |
| Manage tests | Score report settings | Add acknowledgment message: |
| Manage certificates | Language preference | I understand and agree with the instructions and rules of this assignment |
| Question pools | Attachments | Creation type: |
| Grading scales | External attributes | Generated |
| | | Test versions: |

- 3. Select the desired test.
- 4. Scroll down to find the Workspace drop down menu.
- 5. Click on the menu and choose the workspace you want to place the test in.
- 6. Click the "Save" button.

| Tests | Delivery preference | Dynamically generated 6 | |
|---------------------|---------------------|---------------------------|--------------------------|
| New test | | Belongs to training: | 0 |
| Manage tests | | Training | |
| Manage certificates | | Workspace: Workspace 1 | © ~ |
| Question pools | | Created by: | Creation date: |
| Grading scales | | admin | Sep-07-2022 11:13 AM EDT |
| Question categories | | Updated by: | Update time: |
| E-testing center | | admin | Sep-07-2022 11:56 AM EDT |
| Surveys | | Save Cancel | |

7.5.1.2 Confirmation

To confirm that the requirement is met, the workspace admin should be able to see the test in the "Manage tests" table, as shown in the picture bellow.

| ? | you <mark>te</mark> stme |
|---|--------------------------|
|---|--------------------------|

| All tests (1) Manage | etests | | Import data | Q Search | anything | 0 📮 🌒 |
|----------------------|-----------------|-------------------|-------------|---------------|-------------------|-----------|
| All tests | | | | | | |
| Name 🗤 | Creation date 👔 | Status ↑↓ | ID ↑↓ | External ID 👈 | Creation type 👈 | Proctored |
| Q Search | | Select one \sim | Q Search | Q Search | Select one \sim | |
| Test LATTAS 733 | Sep-21-2022 | Published | 1960 | | Manually created | No |
| | | | 1 > >> 10 | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

When the conditions to see and open the test are met, the next condition is managing tests. The workspace admin has the **"Manage any test, survey or training"** workspace role permission in **"Workspace 1".** This test is now assigned to **"Workspace 1"** and the user should be able to edit it.

To confirm the manager condition is met, open the test, and update it. A success notification should popup.

With all conditions met, we can conclude that the workspace admin is the manager of all tests in the assigned workspace.

7.5.2 Surveys

Make sure the workspace admin has the required permissions or at least the **"Access test page"** permission.

When the workspace admin opens the list of all surveys, it should be empty if there are no surveys in the workspaces that he is a member of.



| | ne | All surveys (3) Manage surveys | | | + New survey Q. Search a | anything 🔹 😧 📮 🎯 🗸 |
|--------------------------|-------------|-----------------------------------|------------------|---------------------|--------------------------|--------------------|
| A Home | | All surveys | | | | |
| Assignments | * | Name 斗 | Creation date 11 | Status 者 | ID 11 | External ID 11 |
| | | Q Search | | Draft ~ | Q Search | Q Search |
| Users Users 🕑 Workspaces | - - - | | | É | | |
| E-testing center | • | | | No surveys created. | | |
| Surveys | • | Displayed columns | 4 | < 1 > >> 10 v | | 💼 🍇 🛛 Rows: D |
| New survey | | | | | | |
| Manage surveys | | | | | | |

The workspace admin can create a new survey in the workspaces he belongs to, or the super admin can help by reassigning the surveys outside of workspace admin's scope.

7.5.2.1 Reassigning a survey

To reassign a survey, make sure you have the required permission to do so. To reassign any survey, the **"Manage any test, survey or training"** permission is required to open the survey and manage it. To reassign a particular survey, you must be a manager. Therefore, this action depends on two conditions: opening the survey and managing it.

Follow next steps to proceed with reassigning:

- 1. Click the "**Surveys**" option in the left side menu.
- 2. Select the "Manage surveys" item.
- 3. Select the desired survey.
- 4. Scroll down to find the Workspace drop down menu.
- 5. Click on the menu and choose the workspace you want to place the survey in.
- 6. Click the "Save" button.



Workspaces

| Home | | Settings Survey sessions | Candidates Monitoring Questio | ns Grading configuration | Report builder | Managers | Proctors | Au |
|------------------|----------|--------------------------|---|---|----------------|----------|----------|----|
| Assignments | • | Language preference | | n this survey, the "Allow test continua e their answers, take a pause, and co od. | | | | |
| Users | Ŧ | Attachments | Label: | | 0 | | | |
| Workspaces | - | External attributes | | | | | | |
| workspaces | | Delivery preference | Add survey instructions: | | 0 | | | |
| Tests | • | | Add arbitrary text like survey instruct | ctions to be displayed to the candida | | | | |
| E-testing center | . | | Add acknowledgment message: | | 0 | | | |
| | | | I understand and agree with the ins | tructions and rules of this assignmer | nt 🧪 | | | |
| Surveys | ^ | | Workspace: | | 0 | | | |
| w survey | | | Workspace 1 | | ~ | | | |
| nage surveys | | | Created by: | Creation date: | | | | |
| ading scales | | | admin | May-16-2018 06:56 AM ED | Г | | | |
| estion pools | | | Updated by: | Update time: | | | | |
| stion pools | | | admin | Nov-30-2020 04:41 AM EST | r | | | |

7.5.2.2 Confirmation

To confirm that the requirement is met, the workspace admin should now be able to see the survey in the list of managed surveys, as shown in the picture bellow.

<Dodati sliku iz Manage surveys liste koju vidi Workspace Admin i u njoj survey koji je gore editovan>

When the conditions to see and open the survey are met, the next condition is managing the survey. The workspace admin has the **"Manage any test, survey or training"** workspace role permission in **"Workspace 1"**. This survey is now assigned in **"Workspace 1"** and the user should be able to edit it.

To confirm the manager condition is met, open the survey, and update it. A success notification should popup.

With all conditions met, we can conclude that the workspace admin is the manager of all surveys in the assigned workspace.

7.5.3 User groups

Make sure the workspace admin has the required permissions (mentioned before) or at least the **"Access the 'Groups' page"** permission.

When the workspace admin opens the list of all groups, it should be empty if there are no groups in the workspaces that he is a member of.





The workspace admin can create a new group in the workspaces he belongs to, or the super admin can help by reassigning the groups outside of workspace admin's scope.

7.5.3.1 Reassigning a group

To reassign a group, make sure you have the required permission to do so. To reassign any group, the **"Manage any group"** permission is required to open the group and manage it. To reassign a particular group, you must be a manager. So, this action depends on two conditions: opening the group and managing it.

Follow next steps to proceed with reassigning:

- 7. Click the "Users" option in the left side menu.
- 8. Select the "User groups" item.
- 9. Select the desired group.
- 10. Find the Workspace drop down menu.
- 11. Click on the menu and choose the workspace you want to place the group in.
- 12. Click the "Save" button.



Workspaces

| | User groups | Delete New sub-group |
|-----------------------|---|--------------------------|
| f Home | Information Members Managers Statistics | |
| Assignments 👻 | User group ID: Group path: 5110 Sales | |
| 🔐 Users 🔺 | 5110 Sales Group description: | |
| User profiles | Group for all employees from the Sales department. The Sales department consists of two subgroups: client relations and presentation. | |
| User groups | Workspace: | |
| Roles and permissions | Workspace 1 V | |
| My profile | Self-enrollment: ① | |
| Workspaces • | Your role in group: Group manager | |
| Tests 🔹 | Created by: Creation date: | |
| E-testing center | John Smith Oct-01-2018 01:06 PM EDT | |
| | Updated by: Update time: | [|
| Surveys | John Smith Jan-27-2021 10:44 AM EST | |
| Training courses | Save Cancel | |
| Peporting T | | |

7.5.3.2 Confirmation

To confirm that the requirement is met, the workspace admin should now be able to see the group in the list of managed groups, as shown in the picture bellow.

| | User groups | | Q. Search anything |
|---------------------------|---------------------------------|---|--------------------|
| A Home | Create new | | |
| Assignments 👻 | My groups All groups | | |
| 😫 Users 🔷 | Q Search user groups | | |
| User profiles | Space and Engineering Systems 0 | Organize users in groups. Groups can be hierarchically organized. Users can belong to multiple user groups. | |
| User groups My profile | | Use user groups to distribute tests effectively by adding them to testing sessions on the 'Manage tests' page. | |
| Workspaces | | | |
| Tests | | You can do the following on this page:: • Select a group from the navigation on the left. | |
| E-testing center | | Create a new user group or a new sub-group. Assign group manager. They will be able to ded groups, manage group members, use groups when distributing tests, and examine group statistics. | |
| Surveys | | Add members so they can attend tests, surveys, and training courses assigned to this group. | |
| Training courses | | | |
| | | | |
| Reporting | | | |

When the conditions to see and open the user group are met, the condition is managing the group. The workspace admin has the **"Manage any group"** workspace role permission in **"Workspace 1"**. This group is now assigned in **"Workspace 1"** and the user should be able to edit it.

To confirm the manager condition is met, open the group, and update it. A success notification should popup.

With all conditions met, we can conclude that the workspace admin is a manager of all the groups in the assigned workspace.

7.5.4 Question pools

Make sure the workspace admin has required permissions mentioned before or at least the "Access the 'pools' page" permission.

When the workspace admin opens the list of all pools, it should be empty if there are no pools in the workspaces that he is a member of.



The workspace admin can create a new pool in the workspaces he belongs to, or the super admin can help by reassigning the pools outside of workspace admin's scope.

7.5.4.1 Reassigning a pool

To reassign a pool, make sure you have the required permission to do so. To reassign any pool, the "Manage any pool" permission is required to open and manage it. To reassign a particular pool, you must be a manager. So, this action depends on two conditions: opening the pool and managing it.

Follow next steps to proceed with reassigning:



- 13. Click the "Tests" option in the left side menu.
- 14. Select the "Question pools" item.
- 15. Select the desired pool.
- 16. Find the Workspace drop down menu.
- 17. Click on the menu and choose the workspace you want to place the pool in.
- 18. Click the "Save" button.

| | Are you an Egyptology Expert? Question pools | | Options 🔻 | + New sub-pool |
|---------------------|--|----------------|-----------|----------------|
| ft Home | Information Questions Users Statistic | s Comments | | |
| Assignments • | | | | |
| Users 🗸 | Workspace: Workspace 1 | © ~ | | |
| Workspaces | Your role: | | | |
| Tests | Modify | | | |
| New test | Pool type: Test pool | | | |
| Manage tests | Created by: Creation date: | | | |
| Manage certificates | John Smith Jun-14-2022 | 2 10:19 AM EDT | | |
| Question pools | Updated by: | | | |
| Grading scales | John Smith | | | |
| Question categories | Update time: Jun-14-2022 11:03 AM EDT | | | |
| E-testing center | Save | | | |
| Surveys | | | | |

7.5.4.2 Confirmation

To confirm that the requirement is met, the workspace admin should now be able to see the pool in the list of managed pools, as shown in the picture bellow.



| o youtestme | Question pools | + New sub-pool | Q Search anything |
|----------------------------------|---------------------|---|-------------------------------------|
| A Home | New Import • | | |
| Assignments | My pools All pools | | |
| 😌 Users 👻 | Q Search pools | | |
| Workspaces | ✓ Aviation (1) | Organize and store questions in pools. Question pools | |
| Tests 🔺 | | can be hierarchically organized. You can use question pools to create randomly generated test versions. <i>Bay side</i> | |
| New test | | * | |
| Manage tests | | You can do the following on this page:: | |
| Question pools Grading scales | | Select a question pool from the navigation tree on the left or create a new one. Define user roles in question pools. You can choose between the "Read-only" and "Modify" roles. The "Read-only" role allows | |
| Question categories | | users to manage the question pool and its questions. • Create new questions or bulk load them from an Excel file or the QTI package. View, modify, or delete the existing questions. Copy or move them to another question pool. | |
| E-testing center | | | |
| 🗉 Surveys 👻 | | | |
| « | | | oo to octange to octifuite mindons. |

When the conditions to see and open the pool are met, the condition is managing the question pool. The workspace admin has the **"Manage any pool"** workspace role permission in **"Workspace 1"**. This pool is now assigned in **"Workspace 1"** and the user should be able to edit it.

To confirm the manager condition is met, open the pool, and update it. A success notification should popup.

With all conditions met, we can conclude that the workspace admin is the manager of all the pools in the assigned workspace.

7.5.5 Training courses

Make sure the workspace admin has the required permissions (mentioned before) or at least the "Access the 'training courses' page" permission.

When the workspace admin opens the list of all training courses, it should be empty if there are no training courses in the workspaces that he is a member of.



| | = Training courses | + New training course | Q Search anything 👔 😥 📮 🛔 🗸 |
|------------------|--------------------------|---|-------------------------------------|
| A Home | Training courses | | |
| 🕄 Assignments 🔻 | All training courses (0) | | |
| 🐞 Users 👻 | ٩ | | |
| Workspaces | No training courses. | | |
| Tests 🗸 | Drafts (0) | Manage training courses with multimedia content and short tests. <u>Play tideo</u> | |
| E-testing center | Published (0) | | |
| Surveys 🔻 | 1 Suspended (0) | You can do the following on this page:: | |
| Training courses | | Organize training course in steps that have to be passed in order to complete the training course. Add different types of multimedia content to your training steps. | |
| Training courses | | Quickly create and schedule tests within training courses using the 'ad host set' option. Add existing tests with certificates to your training steps as a check or final evaluation point. These tests must have testing seasions defined in order for candidates to access them. | |
| Reporting | | | |
| | | | |
| »» | | | Go to Settings to activate Windows. |

The workspace admin can create a new training course in the workspaces he belongs to, or the super admin can help by reassigning the training courses outside of workspace admin's scope.

7.5.5.1 Reassigning a training course

To reassign a training course, make sure you have the required permission to do so. To reassign any training course, the **"Manage any test, survey or training"** permission is required to open and manage it. To reassign a particular training course, you must be a manager. So, this action depends on two conditions: opening the training course and managing it.

Follow next steps to proceed with reassigning:

- 19. Click the "Training courses" option in the left side menu.
- 20. Select the "Training courses" item.
- 21. Select the desired training course.
- 22. Find the Workspace drop down menu.
- 23. Click on the menu and choose the workspace you want to place the training course in.
- 24. Click the "Save" button.



Workspaces

| | Banking Training Cours | | Options 👻 | + New training cour |
|------------------|--|---|-----------|---------------------|
| f Home | Information Candida | ates Managers Steps | | |
| _ | Description: | | | |
| Assignments | This course will help you lea creation process, and mode | arn more about banking and banknote, the credit ern technologies in banking. | | |
| Users | ··· | | | |
| Workspaces | Status: | | | |
| | Published | | | |
| Tests | Workspace: | 0 | | |
| E-testing center | ✓ Workspace 1 | ~ | | |
| Surveys | Unlock all steps at once ⑦ | | | |
| ,- | Self-enrolment ① | | | |
| Training courses | · | | | |
| aining courses | Created by: | Creation date: | | |
| | John Smith | May-14-2018 12:52 PM EDT | | |
| Reporting | Updated by: | Update time: | | |
| | | Feb-02-2022 08:22 AM EST | | |

7.5.5.2 Confirmation

To confirm that the requirement is met, the workspace admin should now be able to see the training course in the list of managed training courses, as shown in the picture bellow.

| | = Training courses | + New training course | Q Search anything |
|------------------|--------------------------|--|-------------------|
| A Home | Training courses | | |
| 🚼 Assignments 👻 | All training courses (1) | | |
| 💁 Usera 🔻 | Q. Search | | |
| Workspaces • | Finance Training Course | - | |
| 🗑 Tests 🔻 | ▲ Drafts (0) | Manage training courses with multimedia content and short tests. <i>Play rideo</i> | |
| E-testing center | Published (0) | | |
| 🔲 Surveys 🔻 | I Suspended (0) | You can do the following on this page:: • Organize training course in steps that have to be passed in order to complete the training | |
| Training courses | | course. Add different types of multimedia content to your training steps. Quickly create and schedule tests within training courses using the 'ad hoc test' option. Add existing tests with certificates to your training steps as a check or final evaluation point. | |
| Training courses | | These tests must have testing sessions defined in order for candidates to access them. | |
| Reporting - | | | |
| | | | |
| » | | | |

When the conditions to see and open the training course are met, the next condition is managing the training course. The workspace admin has the **"Manage any test, survey or training"** workspace role



permission in **"Workspace 1"**. This training course is now assigned in **"Workspace 1"** and the user should be able to edit it.

To confirm that the manager condition is met, open the training course, and update it. A success notification should popup.

With all conditions met, we can conclude that the workspace admin is the manager of all the training courses in the assigned workspace.

7.5.6 Question categories

Make sure the workspace admin has the required permissions (mentioned before) or at least the "Access the 'question categories' page" permission.

When the workspace admin opens the list of all question categories, it should be empty if there are no question categories in the workspaces that he is a member of, and if there are no global question categories. In the example bellow, there is one question category without the workspace.

| | | | | Q Search anything 🔹 😥 🕌 よ |
|---------------------|-------------------|------------------------|----------------|--|
| A Home | Custom data types | | | New question category |
| Assignments 👻 | ID ↑↓ | Name 🌮 | Description ↑↓ | Workspace ID ↑↓ |
| 😝 Users 👻 | Q. Search | Q. Search Economics | Q. Search | Q. Search |
| igga Users 👻 | : 10000 | | | 💼 🔊 Rows: 1 |
| Workspaces | | | 1 > >> 10 • | NUWS. 1 |
| Tests 🔺 | | | | |
| | | | | |
| New test | | | | |
| Manage tests | | | | |
| Question pools | | | | |
| Grading scales | | | | |
| Question categories | | | | |
| | | | | |
| E-testing center | | | | |
| 🗉 Surveys 👻 | | | | Activate Windows Go to Settings to activate Windows |
| (K) | | | | V |

To check this, open the question category edit dialog by clicking the "**Edit**" button from the action column. The workspace shouldn't be displayed, meaning it isn't set.



| | ne ertified | | | | Q Search a | nything 🛛 😧 📭 💄 ~ |
|---------------------|-----------------------|----|---------|------------------------|------------|-----------------------|
| f Home | | Cu | istom (| Edit question category | × | New question category |
| Assignments | • | | | Name:* | | Description ↑↓ |
| Subsers | Ţ | : | Q Se | Economics | | Q Search |
| , Users | Ť | | 1000 | Description: | 10 | |
| Workspaces | Ŧ | | | | 10 🔨 | • 🧧 🕵 Rows: 1 |
| | | | | | | |
| Tests | ^ | | | Workspace: | 0 | |
| New test | | | | Select one | ~ | |
| Manage tests | | | | | | |
| Question pools | | | | Save Cancel | | |
| Question pools | | | | | | |
| Grading scales | | | | | | Activate Windows |
| Question categories | « | | | | | |

The workspace admin can create a new question category in the workspaces he belongs to, or the super admin can help by reassigning the question categories outside of workspace admin's scope.

7.5.6.1 Reassigning a question category

To reassign a question category, make sure you have the required permission to do so. To reassign any question category, the **"Manage any test, survey or training"** permission is required to open the question category and manage it. To reassign a particular question category, you must be a manager. So, this action depends on two conditions: opening the question category and managing it.

Follow next steps to proceed with reassigning:

- 25. Click the "**Tests**" option in the left side menu.
- 26. Select the "Question categories" item.
- 27. Select the desired question category and click the "Edit" button form the action column.
- 28. Click on the workspace menu and choose the one you want to place the question category in.
- 29. Click the "Save" button.



| Ø | | | | | Q Search | a anything | • |
|----|----|------------------|-----------------|------------------------|-----------------|----------------------|----------|
| | | | | Edit question category | < | | |
| n | Qu | estion categorie | s | Name:* | | New question categor | y |
| 8 | | ID ↑↓ | | Category C | ription ↑↓ | Workspace ID ↑↓ | |
| | | Q Search | Q Search | Description: | | Q Search | |
| •• | : | 100002 | Category | | | 1 | |
| ۲ | | | | | | 💼 🍋 Rows | s: 1 |
| | | | | Workspace: | @ , | | |
| 0= | | | | | | | |
| | | | | Save Cancel | | | |

7.5.6.2 Confirmation

To confirm that the requirement is met, the workspace admin should now be able to see the question category in the list of managed question categories, as shown in the picture bellow.

| or youtestr | ne | | | | | | | ${\sf Q}_{\rm c}$ Search anything | 0 0 0 0 1 |
|---------------------|----------|-------|---------------|-----------|--------|-------------|----------------------------------|-----------------------------------|--------------------------|
| f Home | | Custo | om data types | | | | | | New question category |
| Assignments | . | | ID ↑↓ | | Name 🌮 | | Description $\uparrow\downarrow$ | | Workspace ID 114 |
| | | | Q. Search | Q. Search | | Q. Search | | | Q. Search |
| Users | * | 1 | 100004 | Astronomy | | | | | 10014 |
| | | ÷. | 100006 | Economics | | | | | |
| Workspaces | Ť | | | | × × | 1 > >> 10 ~ | | | 💼 🚈 Rows: 2 |
| 🛅 Tests | | | | | | | | | |
| New test | | | | | | | | | |
| | | | | | | | | | |
| Manage tests | | | | | | | | | |
| Question pools | | | | | | | | | |
| Grading scales | | | | | | | | | |
| Question categories | | | | | | | | | |
| question categories | | | | | | | | | |
| E-testing center | * | | | | | | | | |
| | | | | | | | | Activate | Windows |
| Surveys | * | | | | | | | | ngs to activate Windows. |
| | ~~ | | | | | | | | |

When the conditions to see and open the question category are met, the next condition is managing the question category. The workspace admin has the **"Manage any question category"** workspace role permission in **"Workspace 1"**. This question category is now assigned in **"Workspace 1"** and the user should be able to edit it.

To confirm the manager condition is met, open the question category, and update it. A success notification should popup.



With all conditions met, we can conclude that the workspace admin is the manager of all question categories in the assigned workspace.

8 Req #63 - Enabling department admins to have access to the current full set of standard reports within the workspace scope

If a user has the workspace admin role, they can access all reports containing the data of all entities in their workspace.

Follow the steps to view the reports for created tests in the workspace:

Click the "**Reporting**" option in the left main menu.

| | My profile | | | Options 💌 |
|-----------------------|--------------------------|--------------------------------------|-------------------------------------|-----------------------------|
| | Information My groups My | y pools My activity log My subscribe | rs My favorite reports My certifica | ates Balance My authorizati |
| 🔐 Users 🖌 | | ID: | Username: | |
| User profiles | Password settings | 1 | admin | |
| | Attachments | Email:* | | |
| User groups | | noreply@youtestme.com | | |
| Roles and permissions | | Current workspace: | 0 | |
| My profile | | Default workspace | ~ | |
| Workspaces | | Role:* | User status: | |
| | | Administrator | Active | |
| Tests 🔹 | · | Time zone: | | |
| E-testing center | | America/Toronto | | |
| | | Language in app: ③ | Language in tests: | |
| Surveys | | English | English | |
| Training courses | | External ID: | Data source: ⑦ | |
| | | 624499 | LMS | |
| Reporting | - | | | |
| 🕸 System | _ | Save Cancel | | |
| - System | « | | | |



Select the "Predefined reports" item.

| or poutestme | My profile | | | | | Options • |
|---------------------|-----------------------------|-------------------------------|---------------------------|-----------------|---------|-----------------|
| USCIS | Information My groups My po | ols My activity log My subscr | ibers My favorite reports | My certificates | Balance | My authorizatic |
| Workspaces • | Password settings | ID: 1 | Username: | | 1 | |
| Tests 🔹 | Attachments | Email:* | | | T | 1 |
| E-testing center | | noreply@youtestme.com | | | | 3 |
| | | Current workspace: | | 0 | A | |
| Surveys | | Default workspace | | ~ | | |
| Training courses | | Role:* | User status: | | | |
| _ | | Administrator | Active | | | |
| Reporting | | Time zone: | | | | |
| Report builder | | America/Toronto | | | | |
| Predefined reports | | Language in app: | ⑦ Language in tests: | 0 | | |
| | | English | English | | | |
| My favorite reports | | External ID: | ⑦ Data source: | 0 | | |
| Scheduled reports | | 624499 | LMS | | | |
| Subscribers | | | | | | |
| 🌣 System 🛴 | | Save Cancel | | | | |

Click the "View all" button for "Test reports".

| | ne | Predefined reports | \sim | | Q. Search anything |
|------------------|----|---------------------------------------|------------------------------------|--------------------------------|--------------------------------|
| ff Home | | Reports for various categories. | | | |
| Assignments | ÷ | User reports (26) View all | Test reports (7) | Survey reports (3) View all | User groups reports View all |
| Users | * | Administrators: 14 | Number of published tests: 61 | Number of published surveys: 2 | Active groups: 33 |
| | | Instructors: 7 | Number of suspended tests: 0 | Number of suspended surveys: 1 | Inactive groups: 0 |
| Workspaces | * | Students: 592 | Number of draft tests: 0 | Number of draft surveys: 0 | |
| | | Others: 19 | | | |
| Tests | * | | | | |
| E-testing center | • | Test question pools view all view all | Survey question pools reports (1) | Training course reports (3) | Question reports (4) View all |
| | | Number of test question pools: 75 | Number of survey question pools: 8 | Number of training courses: 5 | Number of test questions: 1812 |
| Surveys | ¥ | | | Number of managers: 7 | |
| Training courses | * | | | Number of candidates: 37 | |



Select the report "Tests basic info".

| or youtestr | ne | | | Q Search any | thing 😥 🚅 🚳 🗸 |
|------------------|----------|-------|-------------------------------|--|---------------------|
| ft Home | | Prede | fined reports | | |
| Assignments | * | | Report name | Description | My favorite reports |
| Users | * | 1 | Q. Search Tests basic info | List of all tests with their descriptions and creation details | * |
| Workspaces | . | 2 | Item reliability | Central tendencies measures for each attempted test and item reliability on question level | * |
| Tests | Ţ | з | Tests status and availability | List of all tests in the system with some basic informations | * |
| - | | 4 | Test pass rate | The ratio between attempted and passed tests | * |
| E-testing center | Ť | 5 | Average test duration | List of average duration for each attempted test with limited duration | * |
| Surveys | * | 6 | Test results | The final outcome for each user who attempted taking any test within the system | * |
| Training courses | * | 7 | Accommodations by status | List of accommodations for users on testing session. | * |
| Reporting | | | | ≪ < 1 > ≫ 10 ~ | Rows: 7 |

The user will be presented with all tests in the selected workspace.

To confirm that the requirement is met, click on the test name, and make sure that the test's workspace matches the user's current workspace.

9 Req #57 Adding a unique workspace identifier into tests

To confirm that the requirement is met, follow these steps:

- 1. Click the "**Tests**" option in the left side menu.
- 2. Select the "Manage tests" item.

| | All tests (60) Manage tests | | | + N | + New test Import data Q Search anything | | | |
|---------------------|------------------------------------|-----------------|-------------------|----------|---|-------------------------------------|-----|--|
| A Home | All tests | | | | | | | |
| Assignments • | Name ↑↓ | Creation date 👔 | Status ↑↓ | ID ↑↓ | External ID $\uparrow\downarrow$ | Creation type $~\uparrow\downarrow$ | Pre | |
| | Q Search | | Select one \vee | Q Search | Q Search | Select one $ \smallsetminus $ | | |
| Users 🔻 | Quick Quiz - Cryptocurrency | Sep-07-2022 | Published | 1871 | | Generated | | |
| Workspaces | Quick Quiz - Banking - 20th Centu | Sep-07-2022 | Published | 1870 | | Generated | | |
| | Quick Quiz - Introduction to Banki | Sep-07-2022 | Published | 1869 | | Generated | | |
| Tests | Informatics and Computing | Aug-17-2022 | Published | 1868 | | Manually created | | |
| New test | Is your business ready for Blockc | Aug-17-2022 | Published | 1867 | | Manually created | | |
| Manage tests | Java Certification Practice Test | Aug-17-2022 | Published | 1866 | | Manually created | | |
| Manage certificates | Principles of Taxation | Aug-17-2022 | Published | 1865 | | Manually created | | |
| - | SQL Skill and Knowledge Assess | Aug-17-2022 | Published | 1864 | | Manually created | | |
| Question pools | Project Management Certification | Aug-17-2022 | Published | 1863 | | Manually created | | |
| Grading scales | Foreign Legal Systems and their | Aug-17-2022 | Published | 1862 | | Manually created | | |

- 3. Select the desired test.
- 4. Scroll down to find the Workspace drop down menu.
- 5. Click on the menu and choose the workspace you want to place the test in.
- 6. Click the "**Save**" button.

over youtestme

Workspaces

| | All tests (60) / Quick Quiz - Crypto Manage tests | currency | | | 0 | ptions 💌 |
|---------------------|--|--|-----------------------------------|----------------|----------------|----------|
| A Home | Settings Testing sessions (| Candidates Monitoring Questions | Grading configuration | Report builder | Summary report | Managers |
| | Score report settings | Add acknowledgment message: | | 0 | | |
| Assignments • | Language preference | I understand and agree with the instruct | ions and rules of this assignment | | | |
| Users 🔹 | | Creation type: | | | | |
| | Attachments | Generated | | | | |
| Workspaces | External attributes | Test versions: | | | | |
| Tests | Delivery preference | Dynamically generated 6 | | | | |
| New test | | Belongs to training: | | 0 | | |
| Manage tests | | Training | | | | |
| Manage certificates | | Workspace: | | 0 | | |
| Manage certificates | | Workspace 1 | | \sim | | |
| Question pools | | Created by: | Creation date: | | | |
| Grading scales | | admin | Sep-07-2022 11:13 AM EDT | | | |
| Question categories | | Updated by: | Update time: | | | |
| | | admin | Sep-07-2022 11:56 AM EDT | | | |
| E-testing center | | Canad | | | | |
| Surveys | | Save Cancel | | | | |

10 Req #62 - Enabling multi-layer creation of custom question properties

The changes made to the question categories are:



| | Settings and customization | | | | | Q Search anyt | hing |
|--|-------------------------------------|----------------------|---------------|-----------------------------|-------------------|---------------------|---------------------------|
| f Home | System preferences Theme and la | nguage Notifications | Job scheduler | Support Attachments library | Custom properties | | |
| Assignments | Custom data types | Custom data type | s | | | | |
| - | Custom question properties | ID ↑ | ÷ | Name 🌾 | | Description ↑↓ | We |
| Users 👻 | Custom user properties | Q Search | | Q Search | Q Search | | Q Searc |
| Workspaces Tests | Question categories | | | | | | |
| E-testing center | | | | 1 | No custom types. | | |
| 🖬 Surveys 🔻 | | | | ~ | < > >> 10 v | | |
| youtestm GetCent Home | Settings and c System preference | | nguage | Notifications Job schedu | uler Support | Attachments library | Custom propertio |
| Assignments | Custom data types | | Cust | om data types | | | |
| | Custom question p | roperties | | ID ↑↓ | | Name JF | |
| Users | Custom user prope | rties | | Q Search | Q Search | | Q Searc |
| Workspaces | Question categorie | S | | | | | |
| Tests | | | | | | | |
| New test | | | | | | Ν | No custom ty |
| Manage tests | | | | | | | |
| Manage certificates | | | | | | ~ | $\langle \rangle \rangle$ |
| Question pools | | | | | | | |
| Grading scales | | | | | | | |
| Question categories | | | | | | | |

- Question categories can now be assigned to a workspace. If the workspace is not set, the question category will be available to any manager, making it globally available. The question category manager is a user with these permissions: "Access question categories page", "Create question category", and "Manage any question category". Users without the "Manage any question category" permission can also be managers when they create it or if they have the workspace role "Manage any question category" permission in the same workspace.
- The question category name is now unique in the same workspace and out of it.

10.1.1 Creating a question category

To confirm that the requirement is met, follow the next steps to create a question category in the workspace.



To create a question category, the user is required to have the "Page access global" permission and global or workspace role "Create question category" permission. To proceed, follow these steps:

- 1. Click the "**Tests**" option in the left side menu.
- 2. Select the "Question categories" item.

| | | | | | | Q Search anything | 0 0 0 0 |
|---------------------|-----|------------------|------------|-------------------------------------|----------------|-------------------|-----------------------|
| A Home | Que | stion categories | | | | | New question category |
| Assignments 👻 | | ID 11 | N | ame 🌮 | Description 14 | | Workspace ID 11 |
| 👪 Users 👻 | | Q. Search | Q, Search | Q. Search | | Q, Search | |
| Contro | - | 100002 | Category C | | | 1 | |
| Workspaces | | | | $\langle \langle 1 \rangle \rangle$ | 10 ~ | | 💼 💶 Rows: 1 |
| Tests • New test | | | | | | | |
| Manage tests | | | | | | | |
| Manage certificates | | | | | | | |
| Question pools | | | | | | | |
| Grading scales | | | | | | | |
| Question categories | | | | | | | |
| E-testing center | | | | | | | |
| | | | | | | | |

- 3. Click the "New question category" button.
- 4. Provide a unique "Name".
- 5. Select the workspace you want to assign the question category to.
- 6. Click the "Save" button.

| | ne | | | Q Search anything | () ~ |
|---------------------|---------|----|-----------------|--------------------------------------|--------------|
| GetCer | rtified | | | New question category × | |
| f Home | | Qu | estion cate | Name:* New question cate | gory |
| Assignments | - | | ID 🕆 | Description ↑↓ | |
| | | | Q Search | Description: | Q |
| Subsers Users | - | : | 100002 | | 1 |
| Workspaces | - | | | 10 🗸 👛 🦉 Re | ows: 1 |
| Tests | • | | | Workspace: Default workspace V | |
| New test | | | | | |
| Manage tests | | | | Save Cancel | 0 |
| Manage certificates | | | | | |

A success message should appear next to the question category in the table.

11 Req #55 A security layer that allows data separation and permission to access workspaces

This requirement is implemented by introducing the workspace parameter for entities, and new roles and permissions for users.

11.1.1 Data separation

Data separation is implemented by separating entities in workspaces. The separated entities are tests, surveys, training courses, question pools, user groups, users, and question categories. Workspace assignment is required for all entities except users and question categories.

11.1.2 Permission to access workspaces

To create a workspace, a user must have **"Access workspaces page"** and **"Create new workspace"** permissions. To be able to edit the workspace, the user must be the workspace manager. The workspace manager is a user with a permission to **"Manage workspace"** or **"Manage any workspace"**. To be able to view the **"Users"** tab in the workspace, the user must have the global role or the **"View all users"** permission.

For example - to access data in a workspace named **"Workspace 1"**, the user must be a member of **"Workspace 1"** and have a suitable workspace role permission. E.g., to see and manage all question categories, the user must have the **"Manage any question category"** permission for **"Workspace 1"**. To view the question categories dashboard, the user must have the **"Access question category"** global permission. Note that page access is not required for the user to view the list of question categories when editing questions in the pool.

The manager can view all entity data. For example, the **"Workspace 1"** test manager will be able to see all test candidates, even the ones outside of his workspace.

In terms of users, the workspace admin can see the list of users that have a role with the flag **"Users with this role will be publicly available"**. This way, the workspace admin can assign new members to the workspace, without having the global "View all users" permission.

View the chapter **"Introducing the role of a workspace admin"** on how to assign a member and reassign an entity's workspace.

12 Req #66 Allowing unique logo design and color theme for each workspace

To customize the logo and color theme for a workspace, follow these steps:

1. Click the "Workspaces" option in the left side menu and select the "Manage workspaces" item.



| Geice | rtified | | | | | | |
|-----------------------------|---------|---|---|---|--|--|--|
| Home | | Welcome John Smith, | | | | | |
| | | Your role is Administrator. | | | Recent activity 🚧 | | |
| Assignments | * | Your security role is intended for: - Overseeing the entire system - Configuring system setting | | | Certificate "Certificate of Completion about a month ago | | |
| Users | * | - Examining reports | | | Test "Banking - Certification Exam" i | | |
| Workspaces | | As a start, we advise to: | | | about a month ago | | |
| нокарасса | | Click the Tests option from the main menu Select the Manage tests option | | | Test "Banking - Certification Exam" i about a month ago | | |
| nage workspaces | | Under the Name column, search for Report Builder Tes Select the Summary report to see overall statistics | st and select it | | | | |
| | | Select the Summary report to see overall statistics Select the Report builder to generate your report | | | Certificate "Certificate of Completion about a month ago | | |
| nage workspace roles | | | | | | | |
| | | | | | Test "Quick Quiz - Cryptocurrency" is | | |
| Tosta | | III My tests | 🚪 New user | 🌋 New user group | Test "Quick Quiz - Cryptocurrency" is about a month ago | | |
| Tests | • | View the list of tests you can edit, grade or monitor | Create a user profile with a pre-created role in | Organize existing users in a group to easily schedule | Test "Quick Quiz - Cryptocurrency" Ia about a month ago | | |
| | | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | • | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. | Test 'Quick Quiz - Cryptocurrency' ia about a month ago | | |
| | • | View the list of tests you can edit, grade or monitor | Create a user profile with a pre-created role in | Organize existing users in a group to easily schedule | about a month ago •• about a month ago •• •• •• •• •• •• •• •• •• •• •• •• •• •• | | |
| E-testing center | • | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | Create a user profile with a pre-created role in accordance with required permissions. | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. | about a month ago | | |
| E-testing center | * | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | Create a user profile with a pre-created role in accordance with required permissions. | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. | about a month ago •• about a month ago •• •• •• •• •• •• •• •• •• •• •• •• •• •• | | |
| E-testing center Surveys | * | View the list of tests you can edit, grade or monitor depending on the role assigned to you. | Create a user profile with a pre-created role in accordance with required permissions. | Organize existing users in a group to easily schedule tests or generate reports for that group specifically. Create | about a month ago •• about a month ago •• •• •• •• •• •• •• •• •• •• •• •• •• •• | | |

2. Enter the desired workspace by clicking on its name.

| or youtestme | Manage | workspaces | Q Search anything | o 🕫 📲 🎯 - |
|------------------------|--------|-------------------|---|------------------|
| Home | Works | pace information | | Create new |
| Assignments 👻 | | Name †↓ | Description 🕆 | Creation date 14 |
| | | Q, Search | Q. Search | |
| 🔐 Users 👻 | 1 | Default workspace | This workspace is assigned to entities if none is chosen (entity is not categorized). | Sep-27-2022 |
| Workspaces | E. | Admin's workspace | This workspace will be used for presenting the feature. | Sep-27-2022 |
| Manage workspaces | | | ≪ < 1 > ≫ 10 ∨ | 💼 🍋 Rows: 2 |
| Manage workspace roles | | | | |

- 3. In the information tab user will be able to select the theme and upload the logo or favicon.
- 4. Click the "Save" button to update the workspace.

| | Manage workspaces / Admin's workspace Manage workspaces Q Search anything Q Search anything | 🥘 ~ |
|---|--|-----|
| A Home | Information Workspace members Users | |
| Assignments 👻 | Workspace ID: Name:* 10000 Adminis workspace | |
| Users 👻 | Description: | |
| Workspaces | This workspace will be used for presenting the feature. | |
| Manage workspaces Manage workspace roles | Select one V | |
| 🍯 Tests 🔹 👻 | kogs: 🔿 | |
| E-testing center 🔹 | Favicon: | |
| Surveys 👻 | Add favicon | |
| Training courses | Created by: Creation date: admin Sep-27-2022 07:42 AM EDT | |
| Reporting | Save | |
| 🔹 System 👻 | | 0 |



If the user is a member of multiple workspaces, they can change the current workspace by following these steps:

- 1. Click the User profile image in the top right corner.
- 2. Select the "View profile" item.
- 3. Select the current workspace as desired. Click the "Save" button to update the workspace.

| o youtestme | My profile | Options * Q Search anything | 0 0 0 |
|-----------------------|-----------------------|---|--|
| A Home | Information My groups | My pools My activity log My subscribers My favorite reports My certificates Balance My authorizations My grading reports | admin Administrator |
| | Account information | Account information | Administrator Service View profile |
| 🛿 Assignments 🔹 | Personal information | | Sign out |
| 😫 Users 🔶 | Password settings | D: Userana: | |
| User profiles | Attachments | and the second se | |
| User groups | | Email* noreply@youtestme.com | |
| Roles and permissions | | Current workspace: | |
| Ay profile | | 2 Select one | |
| 🕽 Workspaces 💌 | | Rolex* User status: | |
| Tests 👻 | | Administrator Active | |
| i voto | | Time zone | |
| E-testing center * | | America/Toronto | |
| 🛛 Surveys 👻 | | Language in app: O Language in tests: O | |
| Training courses 👻 | | English English | |
| Reporting 👻 | | Loremail 0: Deten source: Deten source: Deten source: Deten source: | |
| | | | |
| 🗘 System | | 3 Save Cancel | |

Note: This action can be performed by any user with permission to access personal information.

13 Req #61 - Enabling automatic assignment of user roles

Automatic assignment of user roles is enabled by user membership in a workspace. A user becomes a member when the membership is created in the workspace. The membership gives the user a specific workspace role with permissions for entities in the workspace.

For example, if the user has the **"Workspace Admin"** role with all test permissions in a workspace named **"Workspace 1"**, that user will manage all tests in **"Workspace 1"**. Consequently, the **"Workspace Admin"** with all user-related permissions will manage all users assigned to the workspace.

The **"Workspace user manager"** role can view all the users in a workspace, create new ones, and update their data.

View the chapter **"Introducing the role of a workspace admin"** on how to assign a member and reassign an entity's workspace.

14 Req #65 - Allowing super admins to access and compare individual reports - reports that show workspace activity

The user can see workspace activity (the number of test attempts and entities.) report in the "**Predefined reports**" page.

To confirm that the requirement is met, first set the desired workspace as current by following the steps:

- 1. Click the User profile image in the top right corner.
- 2. Select the "View profile" item.
- 3. Select the current workspace as desired.
- 4. Click the "Save" button to update the workspace.

| o youtestme | My profile | | | | Options 👻 | Q Search anything | 0 | o 🌓 🎯 🔬 |
|-----------------------|-----------------------|--------------------------------------|--------------------------|---------------------------|------------------------------|-------------------|---|---------------|
| A Home | Information My groups | My pools My activity log My subscrib | bers My favorite reports | My certificates Balance M | My authorizations My grading | reports | | admin |
| Assignments 👻 | Account information | Account information | | | | | 0 | Administrator |
| | Personal information | | | ~ - | | | | Sign out |
| 🔐 Users 🔺 | Password settings | ID: 1 | Username: admin | | 6 | | | |
| User profiles | Attachments | Email:* | | -I | 7 | | | |
| User groups | | noreply@youtestme.com | | | 2 | | | |
| Roles and permissions | | Current workspace: | | | | | | |
| My profile | | 2 Select one | | × | | | | |
| Workspaces | | Role:* | User status: Active | | | | | |
| 🐚 Tests 👻 | | Administrator | Active | | | | | |
| E-testing center • | | Time zone: America/Toronto | | | | | | |
| Surveys 👻 | | Language in app: G | 2) Language in tests: | 0 | | | | |
| | | English | English | | | | | |
| Training courses 👻 | | | Data source: | O | | | | |
| Reporting * | | 624499 | LMS | | | | | |
| 🗘 System | « | 3 Save Cancel | | | | | | |

With the workspace set, all entities and reports will be filtered by that workspace.

The next step requires the administrator role.

Follow these steps to view the reports for created tests in the workspace:

- 1. Click the "**Reporting**" option in the left main menu.
- 2. Select the "Predefined reports" item.
- 3. Click the "View all" button for "Test reports".
- 4. Select the report "Tests basic info".



| | 1e lified | Predefined reports | | | | | |
|----------------------|---------------|---------------------------------------|--|--|-------------------|--------------------------|------------|
| A Home | | Reports for various categories. | | | | | |
| Assignments | * | User reports (26) | | Test reports (7) | | i Survey re | ports (3) |
| Users | - | Administrators: | 14 | Number of published tests: | 61 | Number of published surv | eys: |
| | | Instructors: | 7 | Number of suspended tests: | 0 | Number of suspended su | veys: |
| Workspaces | * | Students: | 592 | Number of draft tests: | 0 | Number of draft surveys: | |
| Tests | * | Others: | 19 | | | | |
| E-testing center | Ŧ | Question reports (7) | | Usage reports (5) | | | |
| Surveys | * | | | | | | |
| | | · · · · · · · · · · · · · · · · · · · | 1812 | Total registered users: | 631 | | |
| Training courses | • | Number of survey question pools: | 8 | Total active users: | 145 | | |
| | _ | Number of test question pools: | 75 | Total test attempts: | 245 | | |
| Reporting | ^ | | | Total proctoring hours: 0 | 0h:26m | | |
| Report builder | | | | | | | |
| Predefined reports | | | | | | | |
| My favorite reports | | | | | | | |
| Scheduled reports | | | | | | | |
| o youtestme | Predefined r | eports / Test reports ined reports | | | | Q Search anything | 0 |
| A Home | Test r | eports | | | | | |
| Assignments - | # Report name | | | Descriptio | n | | My favorit |
| | | Q Search | | | | | |
| Users 🗸 | 1 | Tests basic info | | List of all tests with their descriptions and creation details | Add to fa | | |
| Workspaces | 2 | 2 Item reliability | | Central tendencies measures for each attempted test and item reliability on question level | | | Add to fa |
| | 3 | 3 Tests status and availability | | List of all tests in the system with some basic informations | | | Add to fa |
| Tests 💌 | 4 | Test pass rate | The ratio between attempted and passed tests | Add to fa | | | |
| 🖭 E-testing center 💌 | | | | List of average duration for each attempted test with limited du | Add to fa | | |
| | 6 | Test results | | The final outcome for each user who attempted taking any test | t within the syst | em | Add to fa |
| 🗉 Surveys 🔻 | 7 | Accommodations by status | | List of accommodations for users on testing session. | | | Add to fa |
| Training courses | | | | << < 1 > >> 10 ~ | | | |

The user will be presented with all the tests by the selected workspace.

To confirm that the requirement is met, click on the test name, and make sure that the test's workspace matches the user's current workspace.