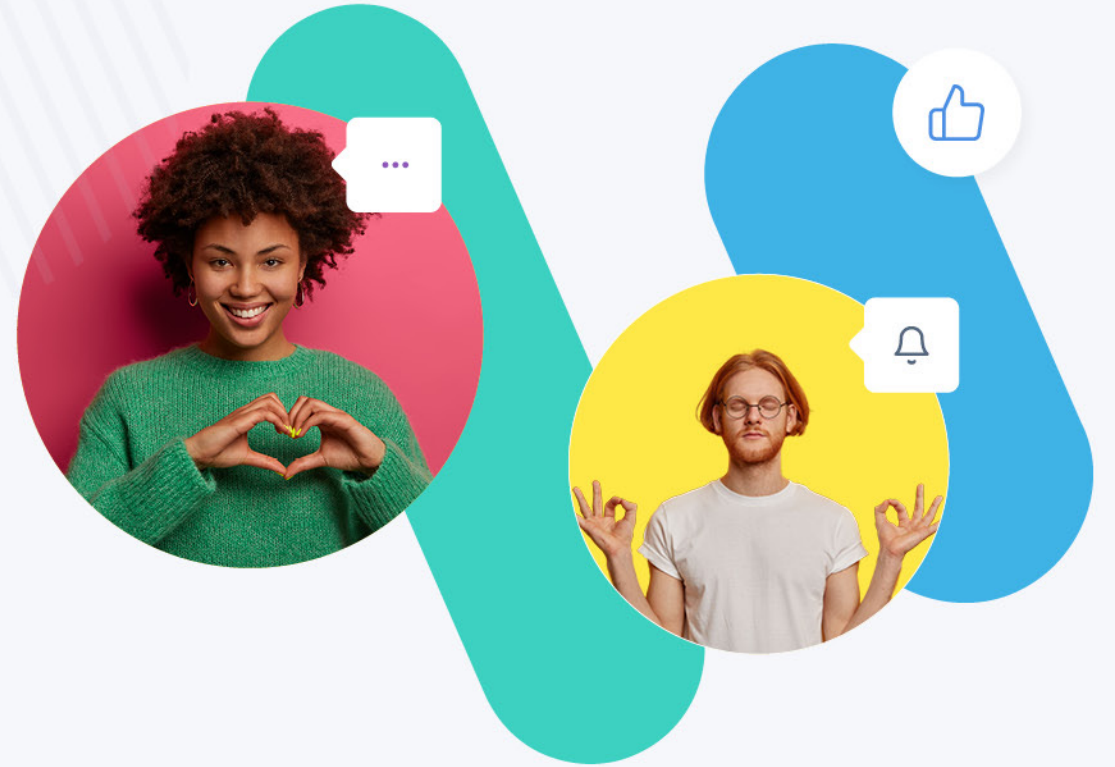


Workvivo Roles & Access

March 2021



Roles & Access Best Practices

Enable/disable permissions for general users as part of the system customization:

Options include:

- Global posting (open/limited)
- Team posting (all/member only)
- Creation of Spaces (admins only/space managers & admins/anyone)

Be aware that roles/access permissions are not 1:1 mapping:

A user can be assigned multiple roles e.g., General Employee + Article Editor + Post Scheduler

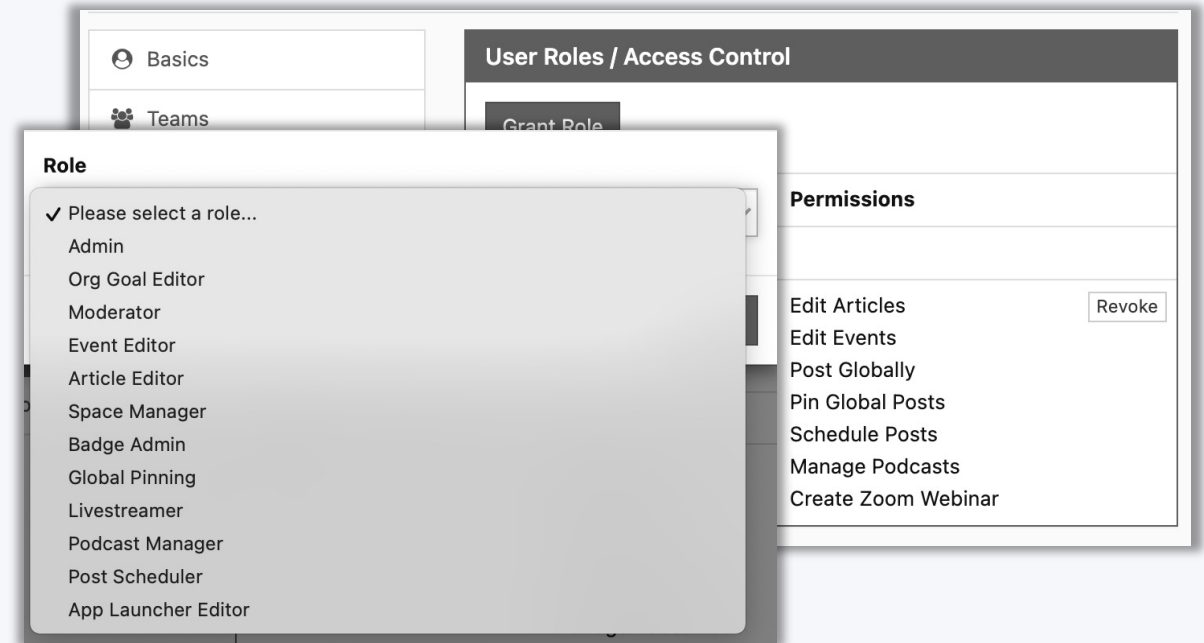
Have a minimum of 3-5 system admins:

While the number of users with this permission should be minimized it is important that you have enough admins for business continuity (planned / unplanned leave, timezones, device availability, etc.)

Have a process in place to manage access:

All system admins should be familiar with this process and know how to give/revoke access at any stage if needed. It is recommended to have rules in place as part of this process to define who should be allowed/disallowed specific access depending on their role in the organization.

If an exception needs to be made, the role should only be assigned temporarily and revoked as soon as it is no longer required. If you need a report outlining what levels of access have been granted to all users, please contact your Workvivo Customer Experience Manager.



Types of Roles

System-level Access Roles

- System-level Access Roles are the **core levels of access that will be provided to users**
- These roles are usually assigned based on the job, department and responsibilities of the user
- These roles **can be assigned or revoked at any time by a system admin**

Specific Permission Roles

- Specific Permission Roles are usually given to users with General Employee Access to give them **specific additional functionality within the platform**
- These roles might be extended to all users in the organization or just a subset who have very specific responsibilities
- These roles **can be assigned or revoked at any time by a system admin**

Workvivo-managed Permission Roles

- These permission roles are similar to the Specific Permission Roles in that they **provide specific additional functionality** to a given user
- These roles cannot be assigned by a system admin and **must be assigned or revoked by your Workvivo Customer Experience Manager**

Space-level Roles

- Space-level Access Roles are the **core levels of access within a Space**
- These roles are usually assigned based on responsibilities of the user within the space, or the intended usage/purpose of the space
- These roles **can be assigned or revoked at any time by a system admin, a space manager, or an owner or admin of the space**

Most Commonly Used Roles

Admin

System-level Access Role

Has full control of the **entire system**, can create or delete **any** content. The only role which gives access to the admin panel and system analytics.

Potential users with this access:

- **IT** if responsible for troubleshooting Workvivo issues
- **HR** if responsible for monitoring usage and activity
- **Internal Comms** if responsible for managing engagement and content
- Anyone else who is responsible for the management/upkeep of Workvivo within the organization

<10

Recommended number of users with this access*

Editor

System-level Access Role

Can post updates, shout-outs, articles, events and podcasts to **everyone** in the organization. Can schedule and pin global posts but **can not delete others' posts**.

Potential users with this access:

- **Leadership/Senior Management team** to allow them flexibility with posting/sharing content
- **HR/Internal Comms** if additional access is required but not acting as a system Admin
- **Marketing** if responsible for creating/publishing organization-wide content

<25

Recommended number of users with this access*

General Employee

System-level Access Role

Can post updates/shout-outs to audiences as defined by the system customization. **Cannot schedule, pin, or delete others' posts or create articles/events.**

Potential users with this access:

- **Vast majority of people in the organization** (set as the default level of access for all users)

>90%

Recommended number of users with this access*

Space Owner/Admin

Space-level Role

Has full control of the **entire Space**, can manage access, and **create or delete any** content in that space. Has **no elevated level of access outside of the Space**.

Potential users with this access:

- **Anyone with responsibility for managing/maintaining a given Space**

2-5

Recommended number of users with this access (per Space)*

*Recommendation depends on size of organization and responsibilities of users

System-level Access Roles



Contents

System-level Access Roles

1. General Employee Access
2. Admin
3. Editor
4. Moderator
5. Space Manager

General Employee Access Role

Default Level of Access

Users with this role can:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to Teams or Spaces (depending on space settings) **that they're a member of**
- View, like and comment on all content shared Globally or to Teams or Spaces they're a member of
- View like and comment on all content shared in public Spaces **even if they're not a member**
- View Apps and Documents that have the audience set Globally or to a Team they're a member of
- View the People Directory, Org Chart, and all user Profiles
- Post Questions/Answers to Spaces they're a member of
- Join public Spaces or request to join private Spaces
- Report any posts that appear on their activity feed
- Bookmark or subscribe to posts
- Edit or delete their own posts

Users with this role cannot:

- Create/edit/publish Articles and Events
- Upload/edit Apps and files in the Documents tab
- Schedule or pin posts
- View Hidden Spaces
- Assign themselves as Owner/Admin of a Space
- Enroll themselves or others in any Space
- Edit or delete updates posted by others
- Send force-push notifications
- View Analytics and activity reports
- Create/Assign/Manage Badges, Awards and Pulse Surveys
- View Pulse survey results & reports
- Create/Edit/Delete Users
- Assign delegates to other users' accounts

Depending on Org settings they may be able to:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to everyone in the organization
- Create Spaces and Subspaces
- Give delegate access to their account/switch into other accounts that have given them delegate access

<div>Basics</div> <div>Teams</div> <div>Security</div> <div>Other Actions</div>	<div>User Roles / Access Control</div> <div>Grant Role</div> <table><tr><th>Name</th><th>Permissions</th></tr><tr><td>General Employee</td><td>Access</td></tr></table>	Name	Permissions	General Employee	Access
Name	Permissions				
General Employee	Access				

Admin Role

Highest Level of Access

Users with this role can:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls **Globally**, to Spaces they're a member of, or to **any Team**
- View, like and comment on all content shared Globally, to Spaces they're a member of, or to **any Team**
- View like and comment on all content shared in public Spaces even if they're not a member
- View all Apps and Documents including those visible to **Teams they're not a member of**
- View the People Directory, Org Chart, and all user Profiles
- Post Questions/Answers to Spaces they're a member of
- Create/edit/publish Articles, Events and Podcasts
- Upload/edit Apps and files in the Documents tab
- Create/Manage/Delete Spaces and Subspaces
- **Enroll themselves or others in any Space** (including Private and Hidden Spaces)
- Report any posts that appear on their activity feed
- Bookmark or subscribe to posts
- Edit or delete their own posts
- Schedule or pin posts
- Delete posts shared by others
- View Hidden Spaces
- Create/Edit/Delete Users (if using automated provisioning these changes may be overwritten)
- Create/Assign/Manage Badges, Awards and Pulse Surveys
- View Analytics and activity reports

Users with this role cannot:

- Assign themselves as Owner/Admin of a Space even if they are currently a member
- Edit updates posted by others
- Send force-push notifications
- View Pulse survey results & reports

Depending on Org settings they may be able to:

- Give delegate access to their account/switch into other accounts that have given them delegate access
- Assign delegates to other users' accounts (users will be notified)

ⓘ Basics

👤 Teams

🔒 Security

⚙️ Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee	Access
Admin	<div>Edit Articles</div> <div>Edit Org Goals</div> <div>Export People</div> <div>Edit Events</div> <div>Edit All Goals</div> <div>Edit Articles For Others</div> <div>Post Globally</div> <div>Pin Global Posts</div> <div>Manage Space Categories</div> <div>Moderate Activities</div> <div>Make Links Shareable</div> <div>Edit App Launcher</div> <div>Manage Awards</div> <div>Manage Space Access</div> <div>Invite Space Members</div> <div>Invited Space Members</div> <div>Space Analytics</div> <div>Edit Space</div> <div>Archive Space</div> <div>Schedule Posts</div> <div>Create Badges</div> <div>Edit Badges</div> <div>Revoke Badges</div> <div>Assign Badges</div> <div>Delete Badges</div> <div>Manage Podcasts</div> <div>Create Zoom Webinar</div> <div>Enrol User To A Space</div> <div>Manage Space Question And</div> <div>Acknowledgment</div> <div>Delegate Access</div> <div>View Content Analytics</div>

Revoke

Editor Role

Elevated Level of Access: Content Publishing Focus

Users with this role can:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls **Globally**, to Spaces they're a member of, or to **any Team**
- View, like and comment on all content shared Globally, or to **Spaces or Teams they're a member of**
- View like and comment on all content shared in public Spaces even if they're not a member
- View Apps and Documents that have the audience set Globally or to a Team they're a member of
- View the People Directory, Org Chart, and all user Profiles
- Post Questions/Answers to Spaces they're a member of
- **Create/edit/publish Articles, Events and Podcasts**
- Create/Manage/Delete Spaces and Subspaces
- Report any posts that appear on their activity feed
- Bookmark or subscribe to posts
- Edit or delete their own posts
- Schedule or pin posts

Users with this role cannot:

- Assign themselves as Owner/Admin of a Space even if they are currently a member
- Enroll themselves or others in any Space
- Edit or delete updates posted by others
- Upload/edit Apps and files in the Documents tab
- Send force-push notifications
- View Pulse survey results & reports
- View Hidden Spaces
- Create/Edit/Delete Users (if using automated provisioning these changes may be overwritten)
- Create/Assign/Manage Badges, Awards and Pulse Surveys
- View Analytics and activity reports
- Assign delegates to other users' accounts (users will be notified)

Depending on Org settings they may be able to:

- Give delegate access to their account/switch into other accounts that have given them delegate access
- Create Spaces and Subspaces

<div>Basics</div> <div>Teams</div> <div>Security</div> <div>Other Actions</div>	<div>User Roles / Access Control</div> <div>Grant Role</div> <table><tr><th>Name</th><th>Permissions</th></tr><tr><td colspan="2">General Employee Access</td></tr><tr><td>Editor</td><td><div>Edit Articles</div><div>Edit Events</div><div>Post Globally</div><div>Pin Global Posts</div><div>Schedule Posts</div><div>Manage Podcasts</div><div>Create Zoom Webinar</div><div>Revoke</div></td></tr></table>	Name	Permissions	General Employee Access		Editor	<div>Edit Articles</div> <div>Edit Events</div> <div>Post Globally</div> <div>Pin Global Posts</div> <div>Schedule Posts</div> <div>Manage Podcasts</div> <div>Create Zoom Webinar</div> <div>Revoke</div>
Name	Permissions						
General Employee Access							
Editor	<div>Edit Articles</div> <div>Edit Events</div> <div>Post Globally</div> <div>Pin Global Posts</div> <div>Schedule Posts</div> <div>Manage Podcasts</div> <div>Create Zoom Webinar</div> <div>Revoke</div>						

Moderator Role

Elevated Level of Access: Content Moderation Focus

Users with this role can:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to Teams or Spaces (depending on space settings) **that they're a member of**
- View, like and comment on all content shared Globally or to Teams or Spaces they're a member of
- View like and comment on all content shared in public Spaces **even if they're not a member**
- View Apps and Documents that have the audience set Globally or to a Team they're a member of
- View the People Directory, Org Chart, and all user Profiles
- Post Questions/Answers to Spaces they're a member of
- Join public Spaces or request to join private Spaces
- Report any posts that appear on their activity feed and be **notified when posts are reported** by others
- Bookmark or subscribe to posts
- Edit or delete their own posts
- **Delete updates posted by others**

Users with this role cannot:

- Create/edit/publish Articles and Events
- Upload/edit Apps and files in the Documents tab
- Schedule or pin posts
- View Hidden Spaces
- Assign themselves as Owner/Admin of a Space
- Enroll themselves or others in any Space
- Edit updates posted by others
- Send force-push notifications
- View Analytics and activity reports
- Create/Assign/Manage Badges, Awards and Pulse Surveys
- View Pulse survey results & reports
- Create/Edit/Delete Users
- Assign delegates to other users' accounts

Depending on Org settings they may be able to:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to everyone in the organization
- Create Spaces and Subspaces
- Give delegate access to their account/switch into other accounts that have given them delegate access

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Moderator	Moderate Activities <div>Revoke</div>

Space Manager Role

Elevated Level of Access: Spaces Focus

Users with this role can:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to Teams or Spaces (depending on space settings) **that they're a member of**
- View, like and comment on all content shared Globally or to Teams or Spaces they're a member of
- View like and comment on all content shared in public Spaces **even if they're not a member**
- View Apps and Documents that have the audience set Globally or to a Team they're a member of
- View the People Directory, Org Chart, and all user Profiles
- Post Questions/Answers to Spaces they're a member of
- Report any posts that appear on their activity feed
- Bookmark or subscribe to posts
- Edit or delete their own posts
- **Enroll themselves or others in any Space** (including Private and Hidden Spaces)
- View Hidden Spaces
- Manage/Delete Spaces and Subspaces and view Space Analytics
- Create/edit/publish Articles, Events, Documents, or Pages within public Spaces or Spaces they're a member of

Users with this role cannot:

- Create/edit/publish **Global** Articles, Events or Podcasts
- Upload/edit Apps and files in the Documents tab
- Schedule or pin posts
- Assign themselves as Owner/Admin of a Space even if they are currently a member
- Edit or delete updates posted by others
- Send force-push notifications
- View Analytics and activity reports
- Create/Assign/Manage Badges, Awards and Pulse Surveys
- View Pulse survey results & reports
- Create/Edit/Delete Users
- Assign delegates to other users' accounts

Depending on Org settings they may be able to:

- Post Updates, Shout-outs/Kudos, Value updates, and Polls to everyone in the organization
- Create Spaces and Subspaces
- Give delegate access to their account/switch into other accounts that have given them delegate access

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Space Manager	<div>Manage Space Access</div> <div>Invite Space Members</div> <div>Invited Space Members</div> <div>Space Analytics</div> <div>Edit Space</div> <div>Archive Space</div> <div>Enrol User To A Space</div> <div>Manage Space Question And Acknowledgment</div> <div>Revoke</div>

Specific Permission Roles



Contents

Specific Permission Roles

1. Global Pinning
2. Post Scheduler
3. Article Editor
4. Event Editor
5. Podcast Manager
6. App Launcher Editor
7. Badge Admin
8. Org Goal Editor Role

Global Pinning Role

Specific Permission Role

Users with this role can:

- Pin global posts to the main activity feed
- Manage pinned posts on the activity feed

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Global Pinning	Pin Global Posts

Revoke

Post Scheduler Role

Specific Permission Role

Users with this role can:

- Schedule posts

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Post Scheduler	Schedule Posts

Revoke

Article Editor Role

Specific Permission Role

Users with this role can:

- Create/edit/publish/delete Articles
- Manage Hero Articles

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Article Editor	Edit Articles

Revoke

Event Editor Role

Specific Permission Role

Users with this role can:

- Create/edit/publish/delete Events
- Create Zoom webinars (if integration is enabled)

👤 Basics

👥 Teams

🔒 Security

⚙️ Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Event Editor	Edit Events Create Zoom Webinar

Revoke

Podcast Manager Role

Specific Permission Role

Users with this role can:

- Create/edit/publish/delete Podcasts*

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Podcast Manager	Manage Podcasts

Revoke

*Podcasts must be enabled for your organization to use this feature; your customer experience manager can enable them for you

App Launcher Editor Role

Specific Permission Role

Users with this role can:

- Create/sort/edit/delete Apps
- Create/sort/edit/delete Documents
- View all Apps and Documents including those visible to Teams they're not a member of

Basics

Teams

Security

Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
App Launcher Editor	Edit App Launcher

Revoke

Badge Admin Role

Specific Permission Role

Users with this role can:

- Create/edit/assign/revoke/delete Badges*

👤 Basics

👥 Teams

🔒 Security

⚙️ Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Badge Admin	Create Badges Edit Badges Revoke Badges Assign Badges Delete Badges

Revoke

*Badges must be enabled for your organization to use this feature; your customer experience manager can enable them for you

Org Goal Editor Role

Specific Permission Role

Users with this role can:

- Create/edit/delete organization Goals/Values

👤 Basics

👥 Teams

🔒 Security

⚙️ Other Actions

User Roles / Access Control

Grant Role

Name	Permissions
General Employee Access	
Org Goal Editor	Edit Org Goals

Revoke

Workvivo-managed Permission Roles



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Contents

Workvivo-managed Permission Roles

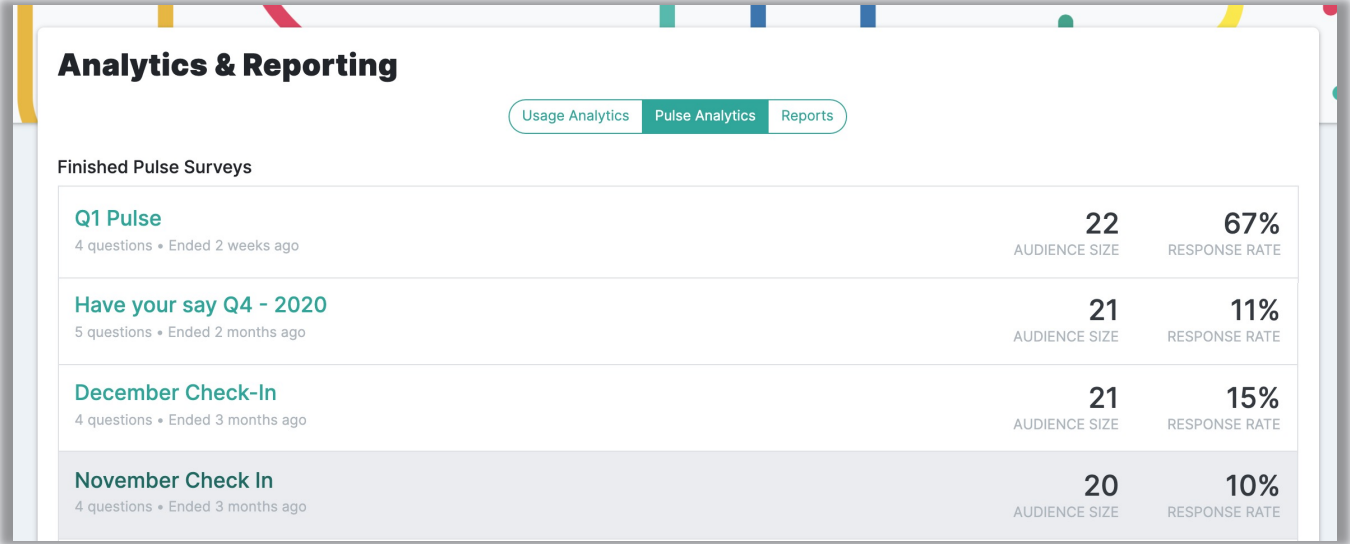
1. Pulse Survey Analytics
2. Force-push Notifications
3. Social Advocate

Pulse Survey Analytics

Workvivo-managed Permission Role

Users with this role can:

- View results and analytics of Pulse Surveys (user **must be a system admin** to be able to see any global analytics)



The screenshot displays the 'Analytics & Reporting' section of the Workvivo interface. It features a tabbed navigation bar with 'Usage Analytics', 'Pulse Analytics' (selected), and 'Reports'. Below this, a section titled 'Finished Pulse Surveys' contains a table with four rows of survey data. Each row lists the survey name, the number of questions, the end date, the audience size, and the response rate. The 'November Check In' row is highlighted in grey.

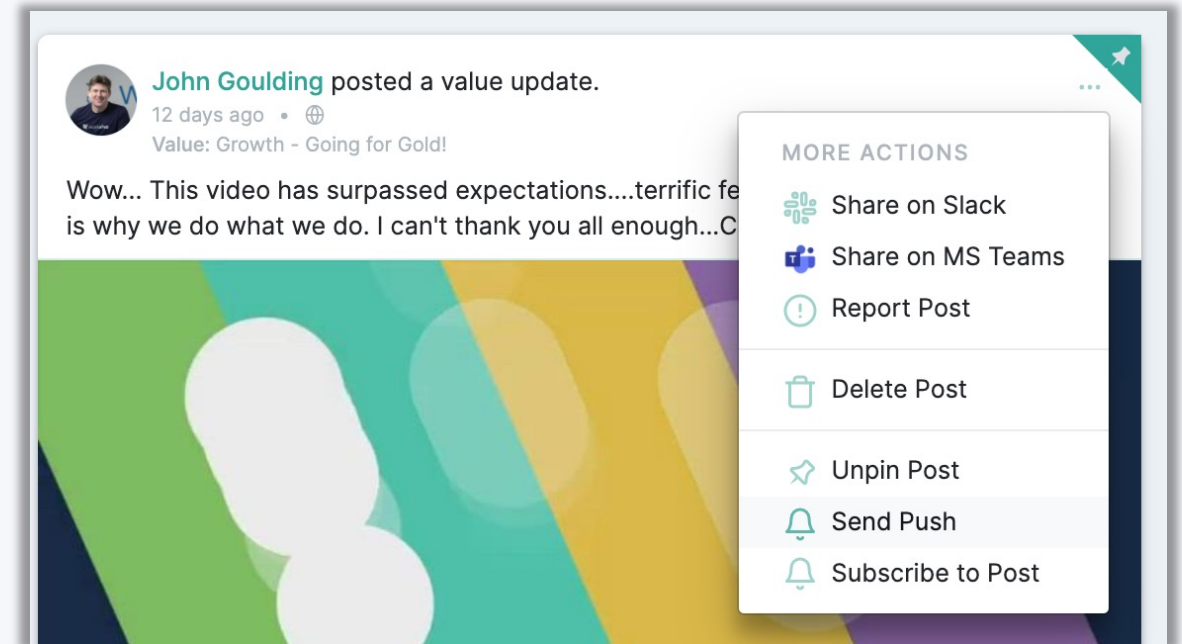
Finished Pulse Surveys			
Q1 Pulse	4 questions • Ended 2 weeks ago	22	67%
		AUDIENCE SIZE	RESPONSE RATE
Have your say Q4 - 2020	5 questions • Ended 2 months ago	21	11%
		AUDIENCE SIZE	RESPONSE RATE
December Check-In	4 questions • Ended 3 months ago	21	15%
		AUDIENCE SIZE	RESPONSE RATE
November Check In	4 questions • Ended 3 months ago	20	10%
		AUDIENCE SIZE	RESPONSE RATE

Force-push Notifications

Workvivo-managed Permission Role

Users with this role can:

- Force notification to all members of the organization, regardless of their notification settings, intended to be used for crisis comms not general notification

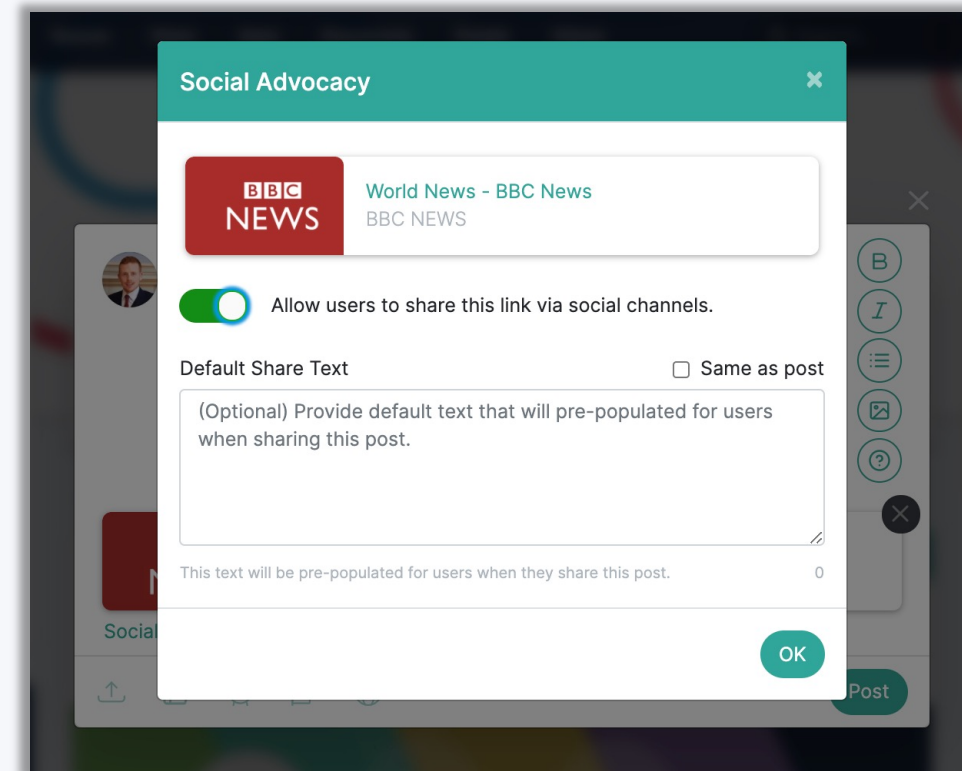


Social Advocate

Workvivo-managed Permission Role

Users with this role can:

- Mark posts as socially shareable*



Space-level Roles



Contents

Space-level Roles

1. Space Owner
2. Space Admin
3. Space Moderator
4. Space Member

Space Owner

Highest Level of Space Access

Users with this role can:

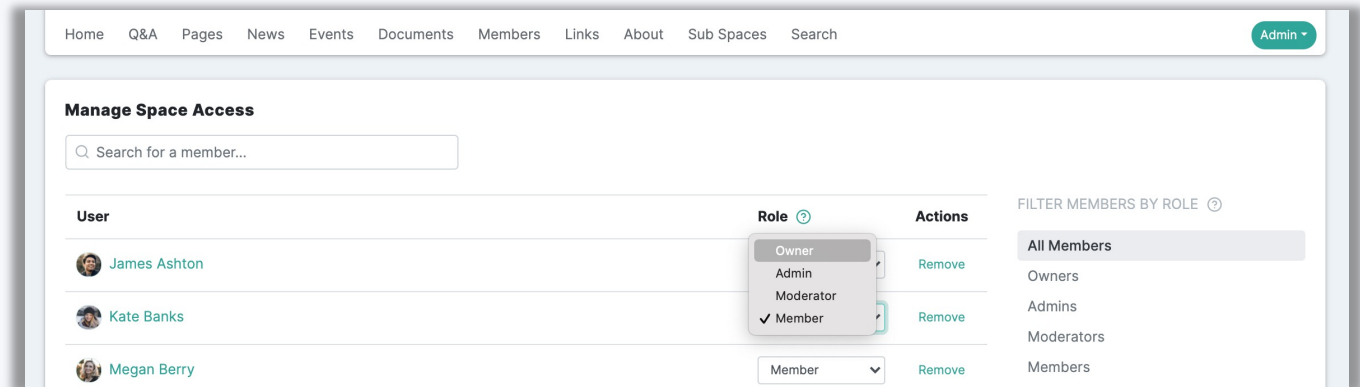
- Post Updates, Shout-outs/Kudos, Value updates, and Polls to the Space
- View, like and comment on all content shared in the Space
- Post Questions/Answers to the Space
- Create/edit/publish Articles, Events, Documents and Pages within the Space
- Manage Access Permissions for Space Members (assign Admin/Owner /Moderator/Member access to the Space)
- Enroll others in the Space
- Pin Posts on Space Feed
- Re-Invite Colleagues to Join Space
- Manage Space Join Requests
- View Space Analytics
- Edit Space Details (name, branding, description, permissions, etc.)
- **Archive the Space**

Users with this role cannot:

- Make the Space open to External users after it has been created

Depending on Org settings they may be able to:

- Create Spaces and Subspaces



Space Admin

High Level of Space Access

Users with this role can:

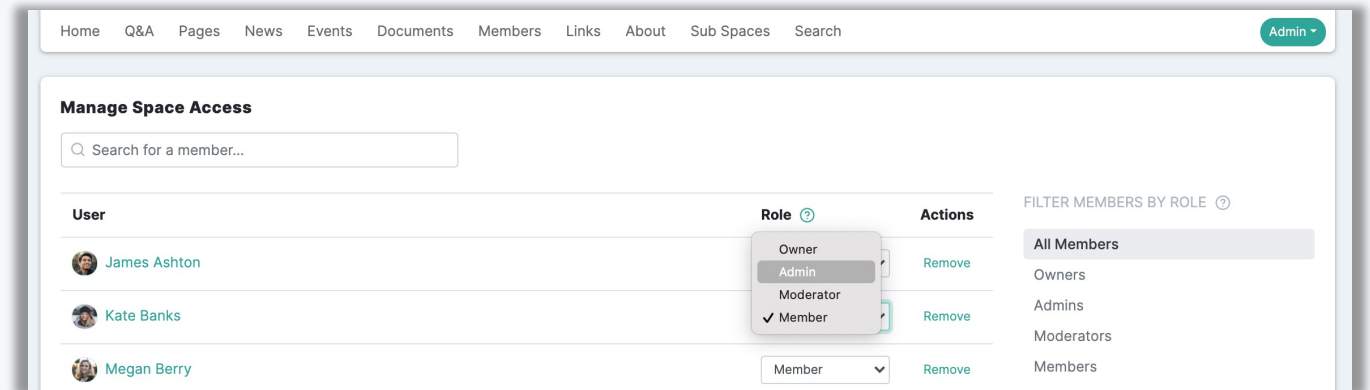
- Post Updates, Shout-outs/Kudos, Value updates, and Polls to the Space
- View, like and comment on all content shared in the Space
- Post Questions/Answers to the Space
- Create/edit/publish Articles, Events, Documents and Pages within the Space
- Enroll others in the Space
- Pin Posts on Space Feed
- Delete posts shared by others
- Re-Invite Colleagues to Join Space
- Manage Space Join Requests
- Manage Access Permissions for Space Members (only members and moderators)
- View Space Analytics
- Edit Space Details (name, branding, description, permissions, etc.)

Users with this role cannot:

- **Archive the Space**
- **Assign Admin/Owner access to the Space**
- Make the Space open to External users after it has been created

Depending on Org settings they may be able to:

- Create Spaces and Subspaces



Space Moderator

Moderate Level of Space Access

Users with this role can:

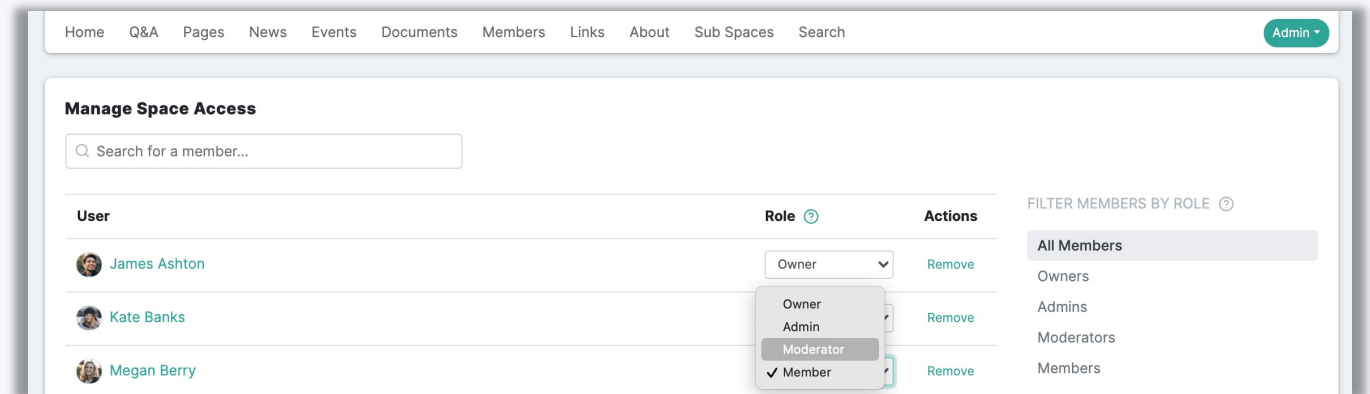
- Post Updates, Shout-outs/Kudos, Value updates, and Polls to the Space
- View, like and comment on all content shared in the Space
- Post Questions/Answers to the Space
- Delete posts shared by others
- Pin Posts on Space Feed

Users with this role cannot:

- Make the Space open to External users after it has been created
- Re-Invite Colleagues to Join Space
- Manage Space Join Requests
- Manage Access Permissions for Space Members
- View Space Analytics
- Edit Space Details (name, branding, description, permissions, etc.)
- Archive the Space
- Create/edit/publish Articles, Events, Documents and Pages within the Space
- Enroll others in the Space

Depending on Org settings they may be able to:

- Create Spaces and Subspaces



Space Member

Default Level of Space Access

Users with this role can:

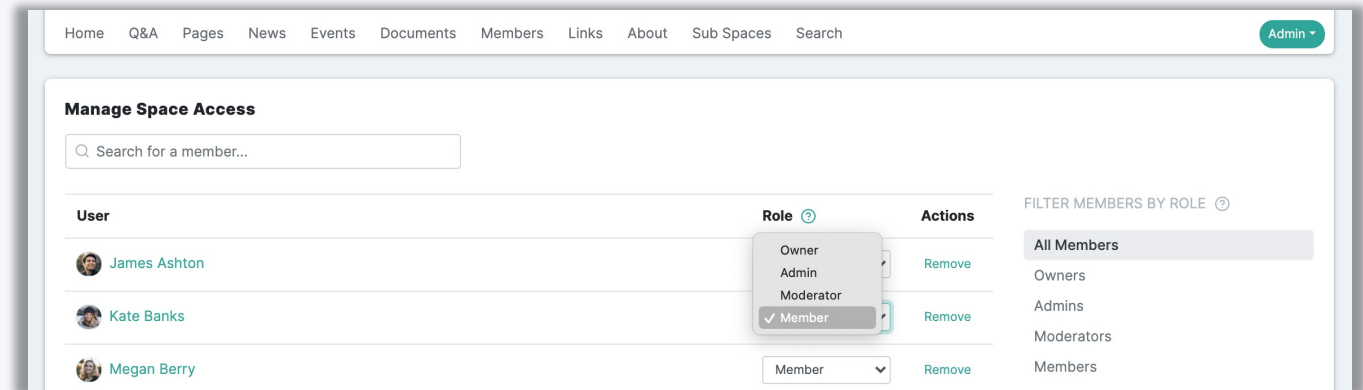
- Post Updates, Shout-outs/Kudos, Value updates, and Polls to the Space
- View, like and comment on all content shared in the Space
- Post Questions/Answers to the Space

Users with this role cannot:

- Delete posts shared by others
- Make the Space open to External users after it has been created
- Create/edit/publish Articles, Events, Documents and Pages within the Space
- Enroll others in the Space
- Pin Posts on Space Feed
- Re-Invite Colleagues to Join Space
- Manage Space Join Requests
- Manage Access Permissions for Space Members
- View Space Analytics
- Edit Space Details (name, branding, description, permissions, etc.)
- Archive the Space

Depending on Org settings they may be able to:

- Create Spaces and Subspaces



Your entire company
in one place

