Zoho Corporation

Roles and permissions

1. Overview

Effective collaboration, project management, and security rely on clearly defined roles and permissions. Zoho QEngine's role-based access control (RBAC) enhances user management by equipping each role with built-in permissions that clearly delineate access rights and responsibilities. Roles can be assigned at two levels:
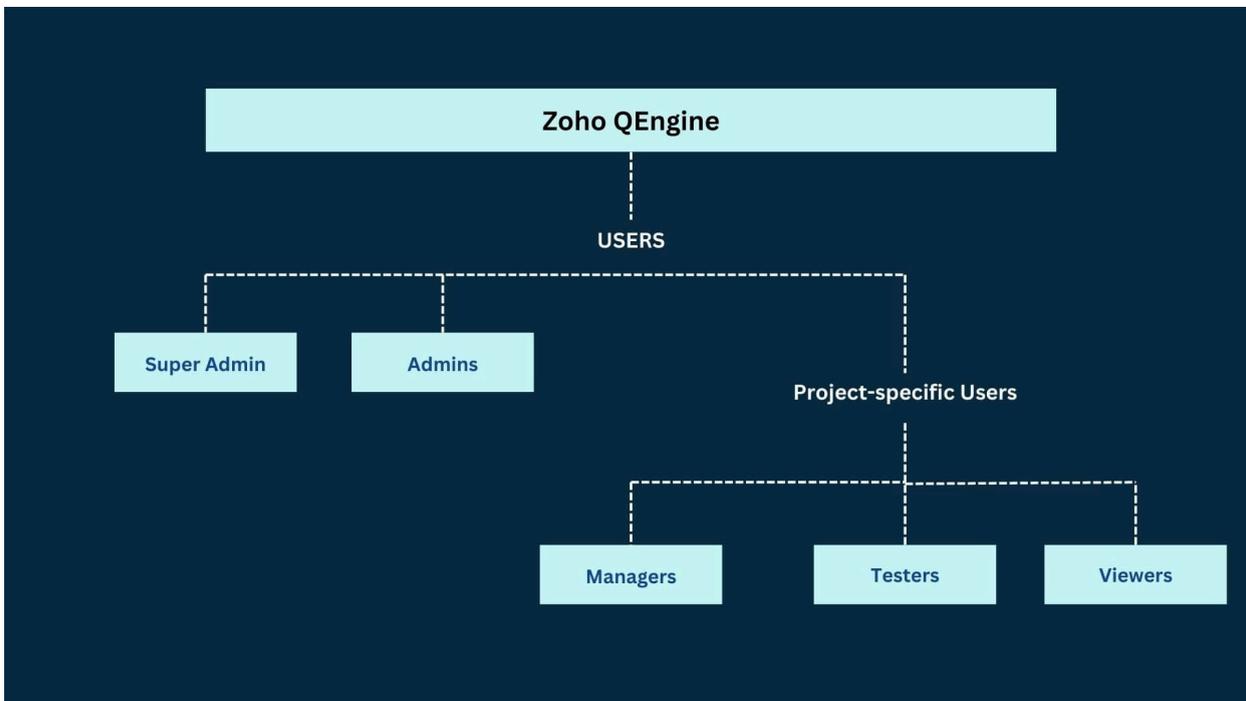
At the **portal level**, certain roles such as **Super Admin**, and **Admin**, have access to **all projects** within the portal by default. These roles manage the overall system, ensuring centralized control and streamlined collaboration across multiple projects.

- **Super Admin**: Has the highest authority within the portal, with access to all projects and the ability to manage portal-wide settings, users, and roles.
- **Admin**: Also has access to all projects by default and can manage users, assign roles, and oversee project-related tasks. However, Admins cannot modify certain super admin privileges like creation of an organization, billing, and setting up integrations.

At the **project level**, roles such as **Manager**, **Tester**, and **Viewer** are assigned on a per-project basis. These roles are specific to individual projects, meaning users with these roles may or may not have access to other projects within the portal.

- **Manager**, **Tester**, and **Viewer** roles are not automatically granted access to all projects. Each role must be assigned specifically to individual projects by a super admin or admin.
- A user can have different roles in different projects, but they will maintain only one role per project. For example, a user might be a manager in one project and a viewer in another.

The following table discusses the detailed description and access rights for each role:

Roles	Description	Example Use Case
Super admin	- Permission to perform all actions inside Zoho QEngine. - Responsible for managing the tool, adding new users, and assigning roles.	The IT Manager of the company can be a super admin to oversee the setup, configuration, and maintenance of Zoho QEngine. In this role, the IT Manager can configure company-wide access by creating and organizing user accounts and assigning roles based on each user's responsibilities. Through Zoho QEngine's user management features, the IT Manager can add new users, modify user profiles, and adjust settings to maintain secure and efficient access across the organization. Additionally, they will serve as the primary point of contact for any tool-related issues.
Admin	Permission to perform all actions except upgrading the plan.	Project managers can be assigned an admin role to oversee daily testing activities. With this role, they can create and manage test plans and

	• Manages the testing process for all projects, including creating and managing test plans, test cases, and test runs.	organize tasks according to project priorities. Using Zoho QEngine's project and review management features, project managers can delegate tasks to team members, monitor progress, and make adjustments as needed to keep the project aligned with goals and timelines.
Manager	• Manages everything in an assigned project. • Can add users, assign roles, and create or modify modules, test cases, test suites, and test plans.	The department head of the projects can be assigned a Manager role in Zoho QEngine to supervise testing activities for specific projects, ensuring they stay on track and meet quality standards. In this role, the department head can monitor progress and quality through Zoho QEngine's dashboards, making it easier to keep projects aligned with departmental goals. They allocate resources by assigning team members to projects and balancing workloads as necessary. Using Zoho QEngine's module and test case creation features, they can organize and structure test cases to meet quality standards and project requirements.
Tester	• Can write, view, edit, and delete test cases and associated modules, test suites, and test plans.	The software quality testing engineer is responsible for creating, executing, and refining test cases within Zoho QEngine to identify and report defects effectively. Using the platform's test management feature, they create, organize, and prioritize test cases. Bug tracking features enable them to report issues with detailed descriptions, facilitating prompt action by developers. They collaborate closely with developers using in-platform review

		management features to rectify any issue. Additionally, Zoho QEngine's dashboard allows engineers to track overall testing progress, defect trends, and ensure high product quality before launch.
Viewer	• Only has permission to view the test cases and associated modules, test suites, and test plans created inside an assigned project.	Quality assurance engineers monitor testing progress in Zoho QEngine without direct involvement in testing activities. They use platform dashboards to observe metrics such as test coverage, defect rates, and pass/fail ratios, ensuring these align with project standards and quality objectives. Through detailed analysis of these metrics, they identify areas for improvement and provide feedback to the testing team.

2. User Roles and Permissions Breakdown

The permissions for each roles are marked in the table below.

> 📄 **Note**: The actions that aren't supported are left blank.

Super admin

Setup > Org Users	
View	✓
Add	✓
Remove (org / project)	✓
Product Walkthrough	✓
Setup > Agent	
View	✓
Create	✓

Edit	✓
Delete	✓
Send Logs	✓
Setup > Connections	
Create Connection	✓
Create Custom Services	✓
Create Connection - API Authentication	✓
Setup > Tunnels	
View	✓
Create	✓
Edit	✓
Delete	✓
Setup > iOS Settings	
View	✓
Create	✓
Edit	✓
Delete	✓
Projects > Users	
View	✓
Add	✓
Remove	✓
Projects	
View	✓
Create	✓
Edit	✓
Delete	✓
Modules	
View	✓
Create	✓

Edit	✓
Delete	✓
Test Cases	
View	✓
Create	✓
Edit	✓
Delete	✓
Review and Approve	✓
Request Review Process	✓
Preview Run	✓
Test Approval Process	✓
Self-healing Process	✓
Functions	✓
Manual Test Case	✓
Versions	✓
Run History	✓
Data-Driven	✓
Test Suites	
View	✓
Create	✓
Edit	✓
Delete	✓
Test Plans	
View	✓
Create	✓
Edit	✓
Delete	✓

	✓
Disable Run	✓
Stop Run	✓
Results	
View	✓
Manual	✓
Settings	
Variables	✓
Elements	✓
Configure Elements Strategy	✓
Platform	✓
Files	✓
Preferences	✓
MFA	✓
Data Source	✓
Dashboard	
View	✓
Upgrade	
Billing	✓

Admin

Setup > Org Users	
View	✓
Add	✓
Remove (org / project)	✓
Product Walkthrough	✓

Setup > Agent	
View	✓
Create	✓
Edit	✓
Delete	✓
Send Logs	✓
Setup > Connections	
Create Connection	✓
Create Custom Services	✓
Create Connection - API Authentication	✓
Setup > Tunnels	
View	✓
Create	✓
Edit	✓
Delete	✓
Setup > iOS Settings	
View	✓
Create	✓
Edit	✓
Delete	✓
Projects > Users	
View	✓
Add	✓
Remove	✓
Projects	
View	✓

Create	✓
Edit	✓
Delete	✓
Modules	
View	✓
Create	✓
Edit	✓
Delete	✓
Test Cases	
View	✓
Create	✓
Edit	✓
Delete	✓
Review and Approve	✓
Request Review Process	
Preview Run	✓
Test Approval Process	✓
Self-healing Process	✓
Functions	✓
Manual Test Case	✓
Versions	✓
Run History	✓
Data-Driven	✓
Test Suites	
View	✓

Create	✓
Edit	✓
Delete	✓
Test Plans	
View	✓
Create	✓
Edit	✓
Delete	✓
Disable Run	✓
Stop Run	✓
Results	
View	✓
Manual	✓
Settings	
Variables	✓
Elements	✓
Configure Elements Strategy	✓
Platform	✓
Files	✓
Preferences	✓
MFA	✓
Data Source	✓
Dashboard	
View	✓
Upgrade	

Billing	✓

Manager

Setup > Org Users	
View	✓
Add	✓
Remove (org / project)	✓
Product Walkthrough	✓

Setup > Agent	
View	✓
Create	✓
Edit	✓
Delete	✓
Send Logs	✓

Setup > Connections	
Create Connection	✓
Create Custom Services	✓
Create Connection - API Authentication	✓

Setup > Tunnels	
View	✓
Create	✓
Edit	✓
Delete	✓

Setup > iOS Settings	
View	✓
Create	✓

Edit	
Delete	
Projects > Users	
View	✓
Add	✓
Remove	✓
Projects	
View	✓
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Edit	✓
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Modules	
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Create	✓
Edit	✓
Delete	✓
Test Cases	
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Create	✓
Edit	✓
Delete	✓
Review and Approve	✓
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Preview Run	✓
Test Approval Process	✓

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Test Plans	
View	✓
Create	✓
Edit	✓
Delete	✓
Disable Run	✓
Stop Run	✓
Results	
View	✓
Manual	✓
Settings	
Variables	✓
Elements	✓
Configure Elements Strategy	✓

Platform	✓
Files	✓
Preferences	✓
MFA	✓
Data Source	✓
Dashboard	
View	✓
Upgrade	
Billing	

Tester

Setup > Org Users	
View	✓
Add	
Remove (org / project)	
Product Walkthrough	✓
Setup > Agent	
View	✓
Create	✓
Edit	✓
Delete	✓
Send Logs	✓
Setup > Connections	
Create Connection	✓
Create Custom Services	✓
Create Connection - API Authentication	✓

Setup > Tunnels	
View	✓
Create	✓
Edit	✓
Delete	✓
Setup > iOS Settings	
View	✓
Create	
Edit	
Delete	
Projects > Users	
View	✓
Add	
Remove	
Projects	
View	✓
Create	
Edit	
Delete	
Modules	
View	✓
Create	✓
Edit	✓
Delete	✓
Test Cases	
View	✓

Create	✓
Edit	✓
Delete	✓
Review and Approve	
Request Review Process	✓
Preview Run	✓
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Functions	✓
Manual Test Case	✓
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Test Suites	
View	✓
Create	✓
Edit	✓
Delete	✓
Test Plans	
View	✓
Create	
Edit	
Delete	
Disable Run	

Stop Run	

Results	
View	✓
Manual	✓

Settings	
Variables	✓
Elements	✓
Configure Elements Strategy	✓
Platform	✓
Files	✓
Preferences	
MFA	✓
Data Source	✓

Dashboard	
View	✓

Upgrade	
Billing	

Viewer

Setup > Org Users	
View	
Add	
Remove (org / project)	
Product Walkthrough	

Setup > Agent	
View	

Create	
Edit	
Delete	
Send Logs	
Setup > Connections	
Create Connection	
Create Custom Services	
Create Connection - API Authentication	
Setup > Tunnels	
View	
Create	
Edit	
Delete	
Setup > iOS Settings	
View	
Create	
Edit	
Delete	
Projects > Users	
View	✓
Add	
Remove	
Projects	
View	✓
Create	
Edit	

Delete	
Modules	
View	✓
Create	
Edit	
Delete	
Test Cases	
View	✓
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Delete	
Review and Approve	
Request Review Process	
Preview Run	
Test Approval Process	
Self-healing Process	
Functions	
Manual Test Case	✓
Versions	✓
Run History	✓
Data-Driven	
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View	
Create	

Edit	
Delete	
Test Plans	
View	
Create	
Edit	
Delete	
Disable Run	
Stop Run	
Results	
View	✓
Manual	✓
Settings	
Variables	✓
Elements	✓
Configure Elements Strategy	✓
Platform	
Files	✓
Preferences	
MFA	
Data Source	✓
Dashboard	
View	✓
Upgrade	
Billing	

3. Related Links

- [User Management](#)