

PoliteMail User Roles

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Applies To: ■ PoliteMail Desktop ■ PoliteMail Online ■ PoliteMail O365

Version: ■ 4.9 ■ 5.0 ■ 5.1+

User Type defines the level of access and sharing the user has within the system. There are three types:

Admin

The Admin, or Administrator, has account wide access to all users, Content (templates, images, Smart Attachments, etc.), and Lists. Admin users may access any other user's metric reports. They can also view and edit any content or lists. Only an Admin may add, migrate and delete users, and make other system-wide settings modifications.

By default, PoliteMail users must [share any content or lists they create](#) if they want them to be accessible to any other user besides themselves (and the Admin). Therefore, to create an "open sharing" account, you may set all users to Admin level, which enables all reports and content to be automatically accessible to all other Admin users. Admins also have access to all content that is marked as Private, regardless of the content owner.

An Admin may control content sharing within the system. An Admin may create or modify templates or lists, and make them available to certain individual users or [Groups](#) (a specific Region or Business). The Admin may assign ownership of any item to a specific user, thereby giving that user the ability to edit, modify and delete that item. By assigning ownership to 'All Users,' the Admin makes the content available to every other user in the system. By assigning an item to a specific Region or Business Unit, the Admin limits sharing and access to just that group. Any user within the group may view the item and use it, but no user may modify or delete the shared item unless the ownership of that item is also assigned.

Manager

Manager level users have the ability to access information for only the users within their group. Managers may access reports, modify and share templates and lists within their specific group. PoliteMail provides two Groups - Business and Region.

For example, if you are set as a Manager of UK (Region sub-group), Consumer Goods (Business sub-group), you could see all other users (and content) within the UK **AND** Consumer Goods.

If you are set as a Manager of UK (Region) (Business sub-group set to Unassigned), you will see content within the Unassigned Business Group and within the UK (Region).

Likewise, if you are set as a Manager of Consumer Goods (Business sub-group) and the Region set to Unassigned, you see the content within the Consumer Goods (Business sub-group) and within Unassigned.

NOTE: It may help to think about Unassigned as content that anyone within your organization can access. A Manager can see content within the Unassigned Business and Region by default; whereas a User can only access Unassigned content if it is shared.

User

A User may only access their own reports, and view, edit and modify their own content. Users must explicitly share any content (templates/images) or lists they want to make accessible to other Users within their group. By default, any content the User creates will be automatically assigned to the Group they belong to. This means that any Manager level user assigned to that Group will be able to see the content, even if its not shared (User will have to share the content for other Users in the Group to see it). If the User does not have a Group assignment, the content will be labelled Unassigned. Users can also view all Admin-shared and Manager-shared content, but they may not modify (save over) or delete these items. Users may assign ownership of their content to another, but if it is assigned outside of their own group, they will lose their own ability to view, edit or use it.

User Roles & Ownership

The various User Roles also come into play when considering who can view content that you share, especially with various Groups or other business Units. [This article](#) goes into this in more detail.