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Sharing Permissions Feature Design Specs

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Context and Impact

Prior to the implementation of this sharing permissions model, the platform had **inconsistent sharing UX patterns** for the key artifacts users interact with on a daily basis.

As lead designer on this project, it was my job to implement the best practices for users when sharing artifacts for the **purposes of collaboration**. In this case these artifacts consisted of data collections (saved data queries), dashboards, and investigations (graph data analysis views).

By modeling the designs after existing sharing patterns that users are familiar with, users were able to quickly adopt the sharing model and user engagement with these artifacts in the platform **increased by 67%** in the first month after the feature was released.

Current Sharing UI Refresher

😤 Public Sharing A Private 2 Privately Shared Invite people: 🐣 Public Who has access Are vou sure? david.krasik@threatq.com (you) is owner david.krasik@threatg.com joe has shared dashboards, how would you like to proceed? n joe@threatg.com Reassign to user By checking this box, it confirms you are deleting this user. This cannot be undone Cancel

Dashboards

- User Specific (no groups)
- No shared "Editor" Rights (Owner or View only)
- Reassign only available when deleting users

Investigations



- Shared or Private only
- Read-only users can view but not edit

Permission Types

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Owner can:

- View
- Edit
- Add/Edit sharing rights for other users (add/elevate/lower/remove rights).
- Reassign Ownership to another user
- Delete (data collection)



Editors can:

- View
- Edit
- Add/Edit sharing rights for other users (but not Owner)

Viewers can:

- View Only

Sharing Data Collections

Viewing, Editing, Ownership Rights

Thre	at Libi	r ary Ir keyw	Bella's Data Collection 👻	① → 図 Save ▲ Share			
Filt	er Set 1		NOT				
• Add	Indica	tors	😐 Sharing			×	II Mar
Туре	•	Sta	Invite people				
	PREVIEW	HEA	Q. Search by na	me	•		н
	۲	Тур			Can view		т
0	۲	Тур	Who has access		& Can edit	-	т
	۲	Тур	Bella Jones (you) bella.jones@thre	atq.com	Make owner	er	т
	۲	Тур					т
	۲	Typ					т
	۲	Typ	Арріу	cancel			т
	۲	Туре	something	Type something	Type some	thing	т
	۲	Туре	something	Type something	Type some	thing	1
	۲	Туре	something	Type something	Type some	thing	1

- Owners and Editors can select a permission level before adding users to the list
- Only Owners can **reassign** ownership



- Owners and Editors can edit the permission levels of users in the list
- Only Owners can **remove** users

Searching and Adding Users

	Thre	at Libr	ary	Bella	ís Data C	Collection 👻 🤅 💌	Save 🔒 Share		
	Q S	earch fo	r keyw	ords					
	Filt • Add	er Set 1 Another F	liter S	NOT					l
	6	Indica	tors	8	Sh	aring		×	III Manage
	Туре	PREVIEW	Sta	I	nvite p	people		0 -	HEAD
		@	Typ			Everybody (Public)			Type
		٢	Тур	W	-				Туре
		٢	Тур	C	AA	Amy Adams		is owner	Туре
		٢	Тур		FA	Fred Armisen			Туре
		٢	Тур		АВ	Alec Baldwin			Туре
		۲	Тур		-				Туре
		۲	Туре	somet	thing		Type something	Type something	Туре
		۲	Туре	somet	thing		Type something	Type something	Туре
		۲	Туре	somet	thing		Type something	Type something	Туре
		۲	Туре	somet	thing		Type something	Type something	Туре

- 'Everybody (Public)' automatically exists in user list as a user group
- All system users are consequently listed alphabetically

Invite need		
Q Dav	2	0 -
DK Dave	Krasik	
Dave	Kurtz	is owne
	Klees	is ow

Who has access							
BJ	Bella Jones (you) bella.jones@threatq.com	is owner					
DK	Dave Krasik dave.krasik@threatq.com	0 - 🗊					

- Typing a name will return possible results
- Clicking on the user name will then add them with the permission level selected on the right

Viewing Data Collection Info

Select a collection



View collection info

Q Search for keywords	Bella's Data Collection 🖉	⑪
	Owned by Bella Jones	Last Modified Bella Jones 10/23/20 8:30am
Filter Set 1 🔲 NOT	Used by (9)	
Add Another Filter Set	Dashboard 1 owned by Bob Ricca	TQ - NE Updates owned by Bob Ricca
	This is a longer dashboa. owned by Bob Ricca	R TQ - NW Updates owned by Bella Jones
Indicators (14,605)	Another Dashboard owned by Bella Jones	This is longer feed name owned by Bella Jones
Type 🔻 Status 💌 Score	Super cool dashboard owned by Dave Krasik	
	+2) Private Dashboards	

- Once a user selects a data collection from the 'Load Collection' menu
 - An (i) icon appears
 - The "Share" button appears
- Clicking on the <a>i reveals information about the data collection
 - Owners and Editors can edit the name 🖉
 - Owners can **delete** 💼
 - All users can see the owner, last modified, and where dashboards are being used
 - If a user has access to the item using the collection, they can click on the link to navigate to it

Sharing Dashboards

DASHBOARDS

Sharing a Dashboard

Current



• Button will be updated to open the Sharing modal



• The functionality of the Sharing modal will be the same as for that of Data Collections, except with dark mode styling DASHBOARDS

Dashboard Sharing Modal

Search dropdown

Invite	people	
<u>م</u> ۵	Davl	• •
W	Dave Krasik	
	Dave Kurtz	is owner
	David Klees	

Permissions dropdown

Invite people	
Q Search by name	@ -
Who has access	
Bella Jones (you) bella.jones@threatq.com	
Everybody (Public)	۰ ج
Dave Krasik dave krasik@threatq.com	Ø • 🛍
Dave Krasik dave krasik@threatq.com	Ø ▼ 🛍 ● Can view
Dave Krasik dave.krasik@threatq.com Bob Ricca bob.ricca@threatq.com	Ø ▼ 10
Dave Krasik dave.krasik@threatq.com BR Bob Ricca bob.ricca@threatq.com	Can view

Sharing Investigations

INVESTIGATIONS

Investigations Permissions



- **Owner** Editing rights plus reassign ownership, delete.
- **Editor** Can add timeline entry, can 'commit' new nodes to an investigation, Modify Status, Priority, Description, Name, share with users, comments.
- Viewer view only

*Need to consider create relationships suggested results to ensure granular relationships are honored

User Groups

USER GROUPS

Adding Users to Groups

ROLE 🗢	GROUPS 🗢	
Maintenance	Everybody (Public)	•
Administrator	Everybody (Public)	Mid-Atlantic Region 🗙 +
Primary Contributor	Everybody (Public)	Northwest Group 🗙 🕂
Administrator	Everybody (Public)	Mid-Atlantic Region 🗙 +
Administrator	Everybody (Public)	•
Read Only	Everybody (Public)	•
Read Only	Everybody (Public)	Northwest Group 🗙 🕂
Primary Contributor	Everybody (Public)	٠
Primary Contributor	Everybody (Public)	Southeast Division 🗶 🕂
Primary Contributor	Everybody (Public)	

- Current "Groups" column becomes user's "Role"
- Custom user groups now appear in new "Groups" column

Add to User Group	×
User Groups	P
Southeast Group	⑪
Northwest Division	th III
Mid-Atlantic Region	⑪
Pacific Coast SOC	⑪
UK Malware Specialists	h لل
⊕ Create new group	h
Apply Cancel	

- Clicking + opens an Add to User Group modal showing available groups
- Users can also create new groups in this modal

USER GROUPS

User Groups in List

6	Sharing	×
	Invite people	0 -
W	😕 Everybody (Public)	
(Southeast Group	is owner
	AA Amy Adams	
	FA Fred Armisen	

- User groups would now appear at top of user lists in the sharing modal
- The Everybody (Public) group always appears first in the list
- Any custom groups follow in alphabetical order
- Then individual names follow in alphabetical order

Group Permissions



- The permissions for user groups can only ever have the "Can Edit" or "Can View" level assigned to it
- "Make Owner" is never a possible option for a user group, only for individuals

Notifications

NOTIFICATIONS

Yesterday

Sharing Notifications

NOTIFICATION CENTER MARK ALL AS READ SYSTEM NOTIFICATION You have been added as an Editor to 'Bella's Data Collection' A few seconds ago A few seconds ago SYSTEM NOTIFICATION Your 'Adversary Watchlist' dashboard has been shared A few seconds ago A few seconds ago Your 'Adversary Watchlist' dashboard has been shared SYSTEM NOTIFICATION You have been removed from 'Bob's Data Collection' You have been removed from 'Bob's Data Collection'

- Send notifications to users when data collections, dashboards, and investigations are shared or unshared with them
- Send notifications to **Owners** when their data collections, dashboards, and investigations are shared