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Sharing Permissions Feature

Design Specs

Bella Jones

UX / UI Designer

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.
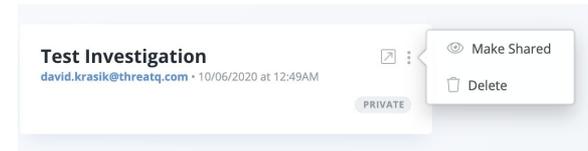
Current Sharing UI Refresher

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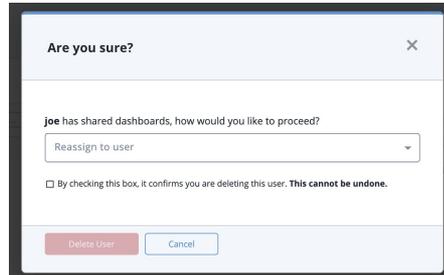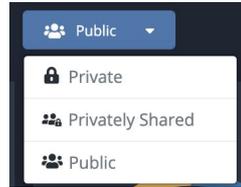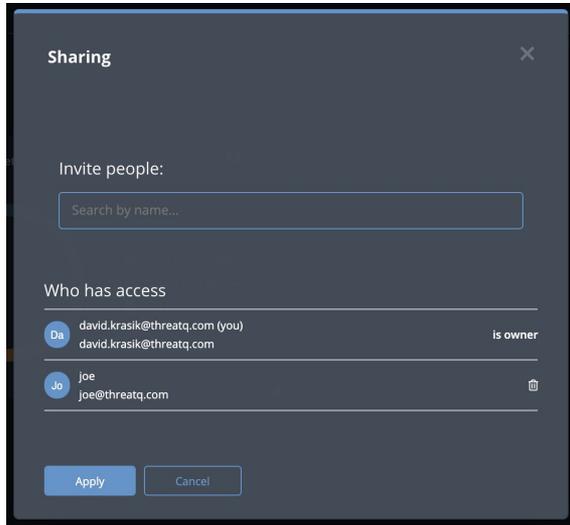
- User Specific (no groups)
- No shared "Editor" Rights (Owner or View only)
- Reassign only available when deleting users

Investigations

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

Note: there is currently no sharing model for Data Collections

Permission Types

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
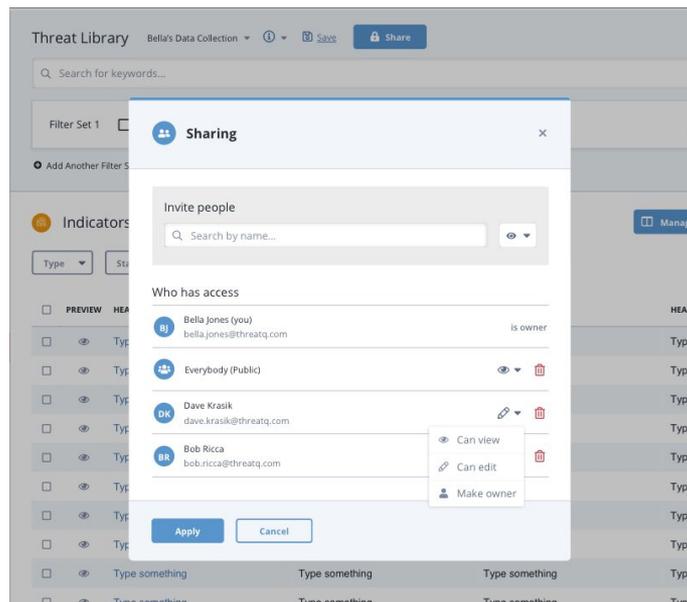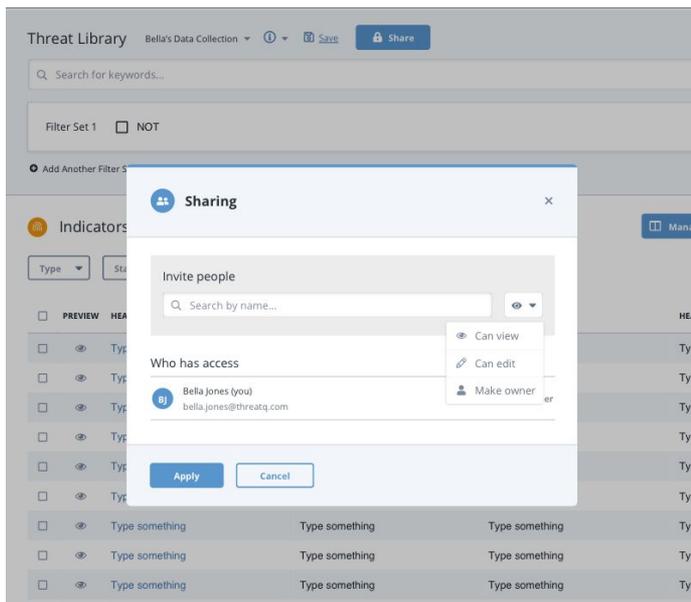- Add/Edit sharing rights for other users (**but not Owner**)
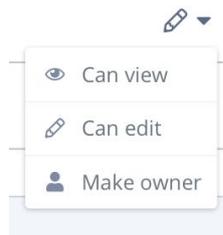
Viewers can:
- View Only
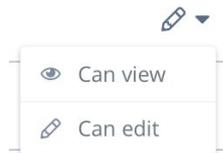
Sharing Data Collections

Viewing, Editing, Ownership Rights
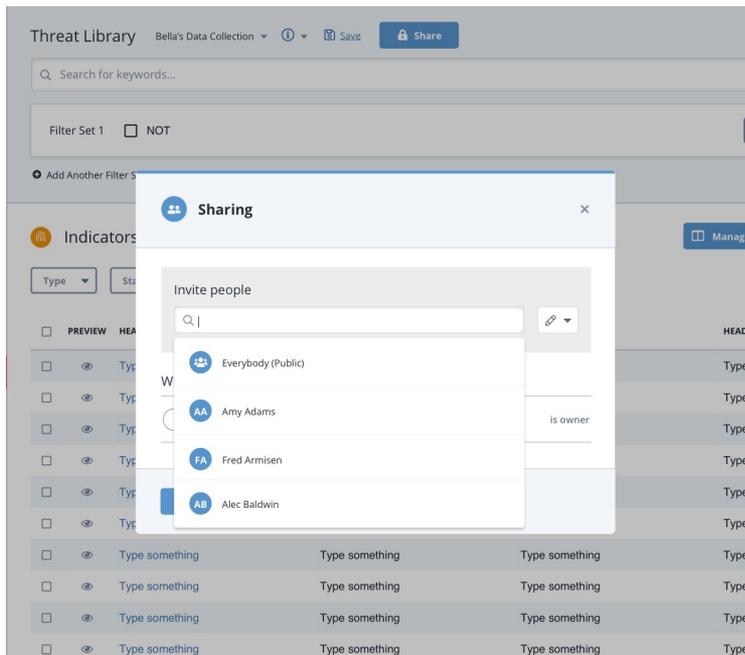

Owner menu

Editor menu

- 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

- 'Everybody (Public)' automatically exists in user list as a user group
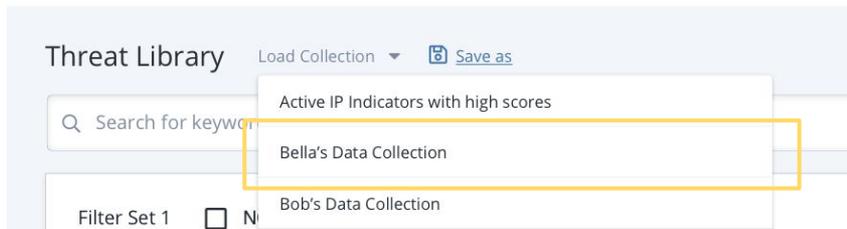- All system users are consequently listed alphabetically
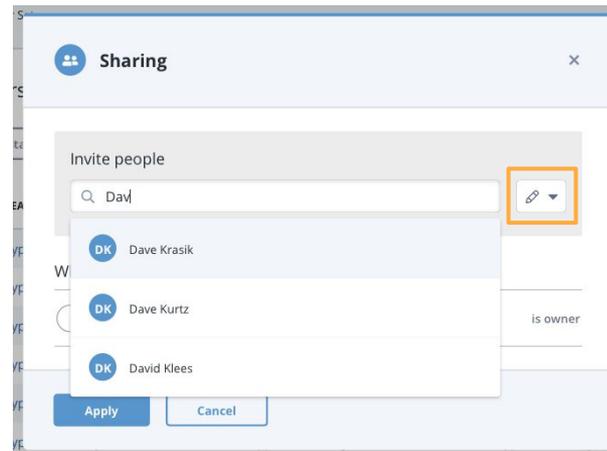
- Typing a name will return possible results
- Clicking on the user name will then add them with the permission level selected on the right
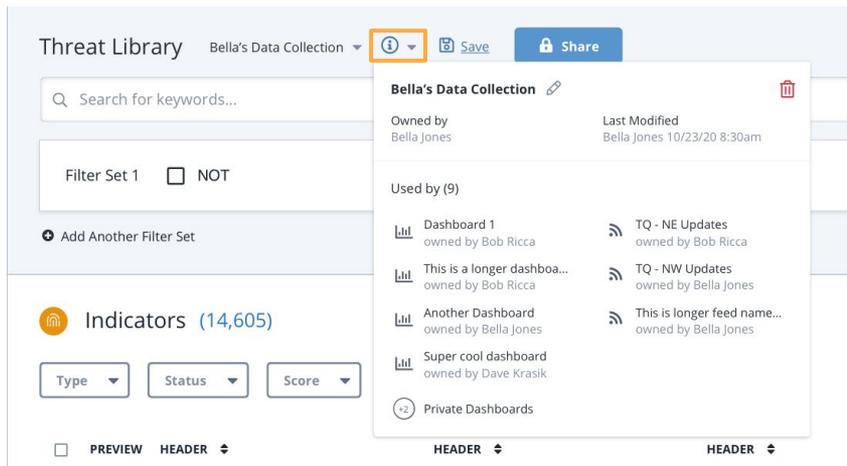
Viewing Data Collection Info

Select a collection

- Once a user selects a data collection from the 'Load Collection' menu
  - An ⓘ icon appears
  - The "**Share**" button appears
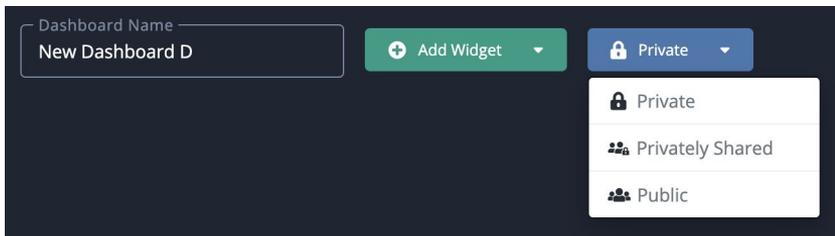
View collection info

- Clicking on the ⓘ 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
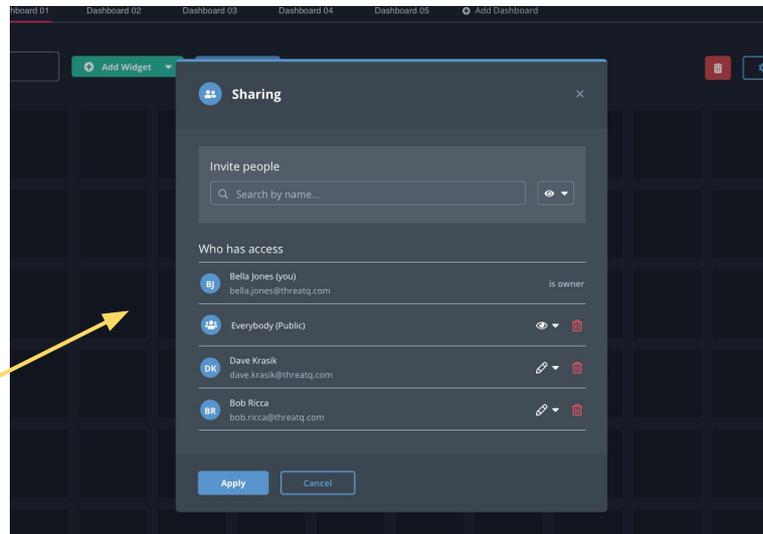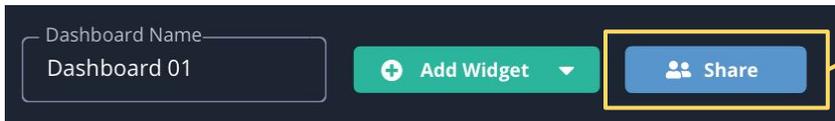
Sharing Dashboards
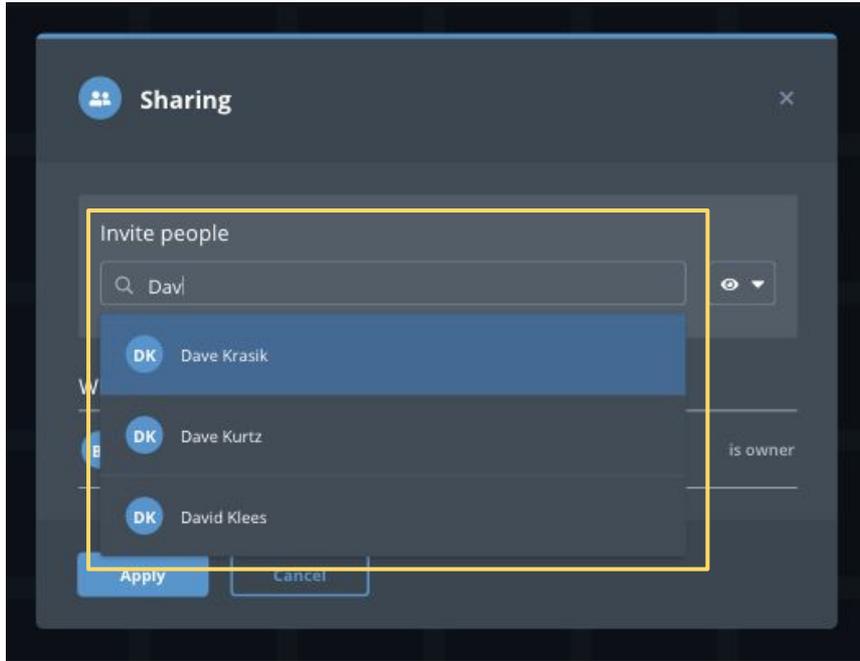
Sharing a Dashboard

Current

New

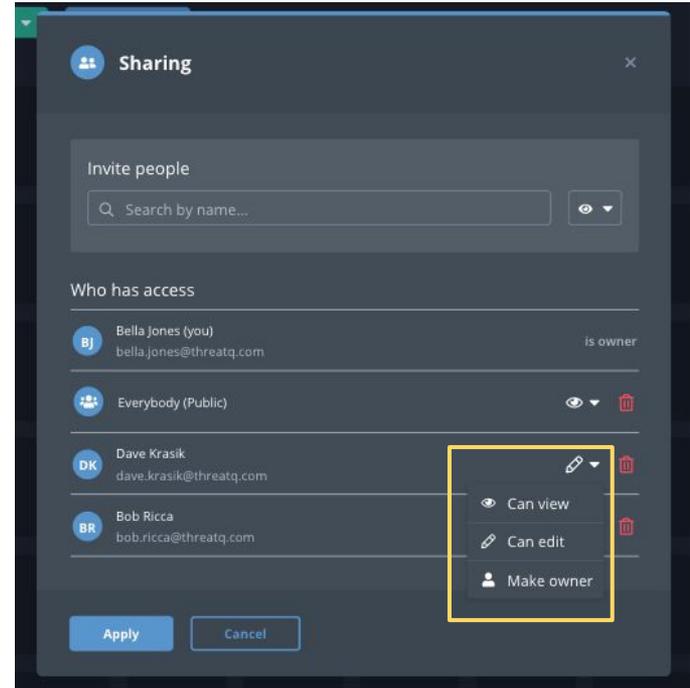- Button will be updated to open the Sharing modal

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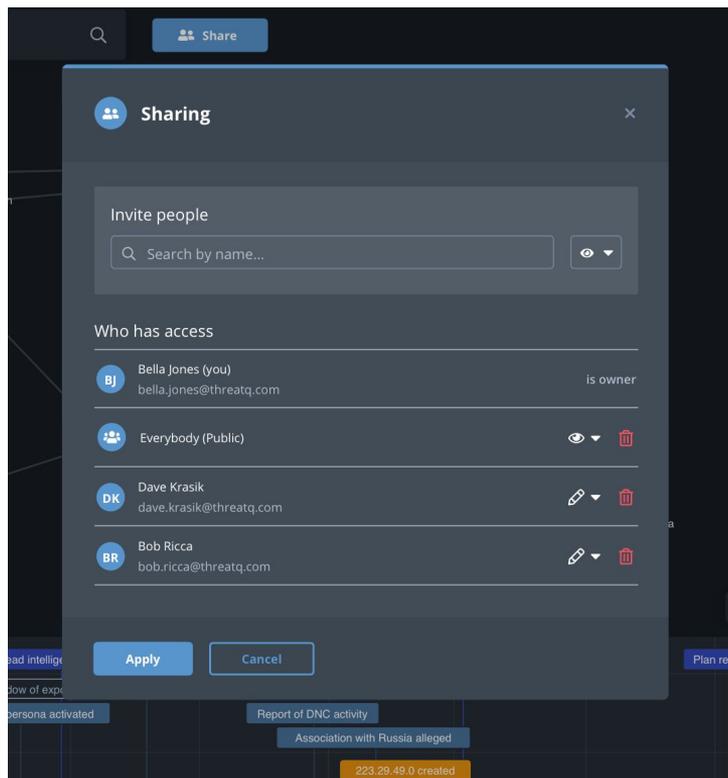
Dashboard Sharing Modal

Search dropdown

Permissions dropdown

Sharing 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

Adding Users to Groups

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

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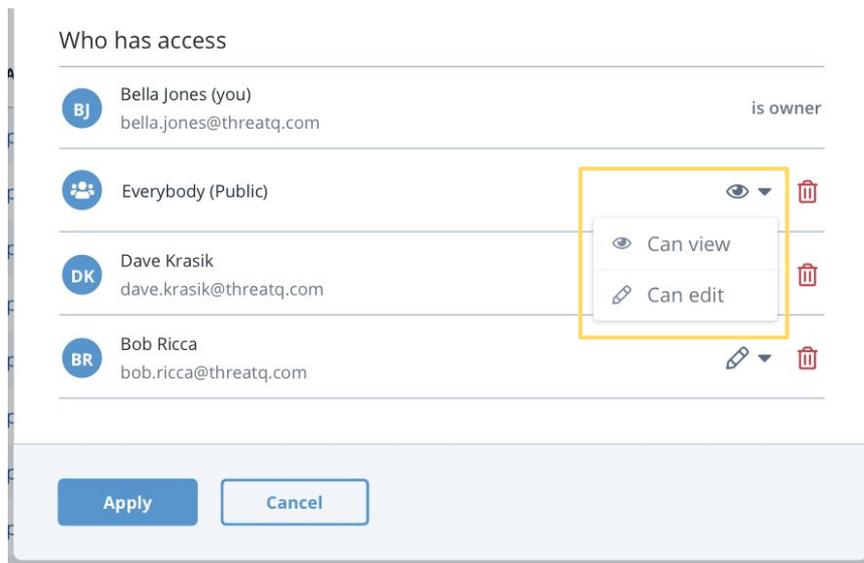- Users can also create new groups in this modal

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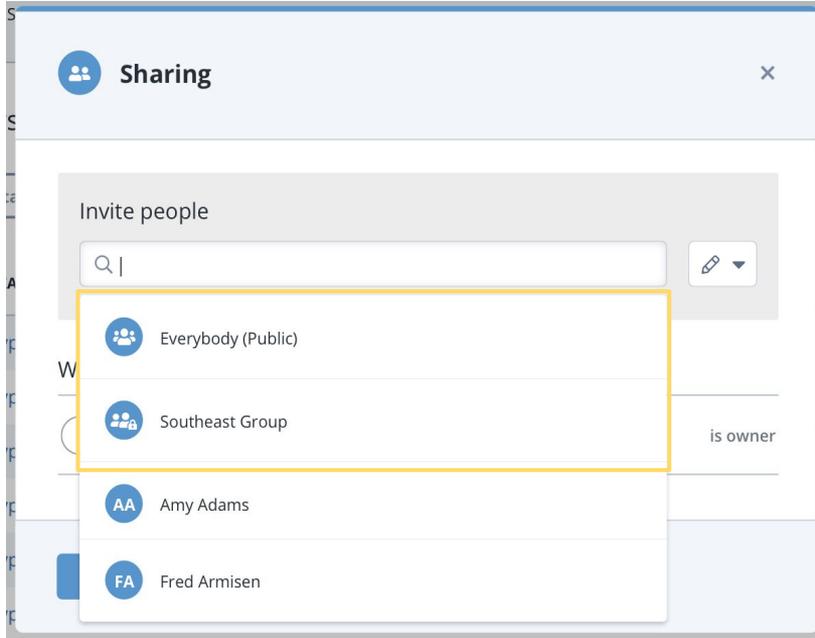
- User groups would now appear at top of user lists in the sharing modal
- The Everybody (Public) group always appears first in the list
- Any custom groups follow in alphabetical order
- Then individual names follow in alphabetical order

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

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

⚠ **SYSTEM NOTIFICATION**
Your 'Adversary Watchlist' dashboard has been shared
A few seconds ago

⚠ **SYSTEM NOTIFICATION**
You have been removed from 'Bob's Data Collection'
Yesterday

- 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