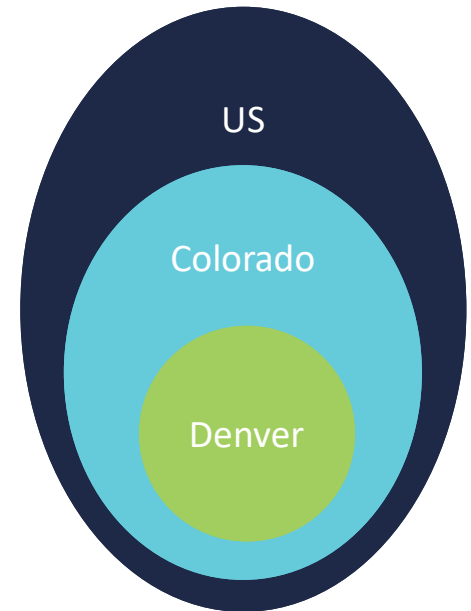# Changes to existing model

- "Collaborators" field on playlists is renamed "Access List"
- Renamed: The role Manager becomes Manager (global)
- Manager (global) and up have access/approval to ALL Playlists regardless of "Access List" entry
- New Role: Group Manager
- Group Manager
  - same rights as "Manager (global)" but only for Playlists/cards that are in the "Access List" of the group they "Manage", or any groups contained within "their" group.
    - Example (diagram): Group Manager/Colorado has manager rights to Colorado and Denver playlists & cards
  - Can add/remove users from THEIR GROUP ONLY in the Admin Console
  - Can only see Users tab in the Admin Console (Not Account, Billing, etc.)
- Visibility is inherited by Group Manager, Manager (global), and above
- Visibility is NOT inherited by levels below Manager (global) or Group manger
- Users can see published Playlists **only** for the groups they are explicitly assigned
  - Example (diagram): User in Colorado can only see Playlists with "Colorado" in the "Access List" NOT "Denver" (visibility is **only** inherited up for Manager-level and above)
  - Done this way so content could be published to state-level employees without being visible to city-level
- Cards created in a playlist follow playlist visibility rules. i.e. if a card is in a playlist with only "Denver" visibility, the cards only show up in search for members of the "Denver" group.
- Assumes most groups are created with "user" rights by default

Changes to existing model/UI

- Admin > Group page: "Managers" section added above "users". Users can be added via shuttle
- Admin > Group page: "Add Group" shuttle
  - On Colorado page, Denver is added as a member. Colorado is the parent
- Admin > Group page: "Member of" lists the groups that this group is a member of
  - The "member of" group name is also a link that opens that specific group page
    - On Denver page, "Member of" shows "Colorado" and when you click "Colorado" it opens the Colorado group page
    - Nice to have: "Member of" reflects nesting, so if Colorado is a member of US, on Denver page "Member of" shows Colorado and US

- Admin > User screen: "Member of" shows group membership and allows you to remove them from the group (an x next to the name) or add them to a group

- Admin > Users screen: Table of Users – replace "job" column with "groups" and put groups after "Role"
  - Table can be filtered by group name

- Admin > Users screen: multiselect enables "add to group…" dropdown and a selector for available groups (nice to have)

- Playlists Page: On the "Approval" tab, a filter is added for "direct group items only". This filters the approvals to only those that are in the direct group the manager is in
  - Colorado manager sees Denver approvals by default. Selecting the filter, only Colorado approvals show
  - The filter is remembered

Admin Console

Account Settings

Users & Groups ⌄

  Users

  Groups

Billing & Payment

Integration ›

Content ›

Administrators Group

Group name
Administrators Group

Role
User

Description

Member Of
All Staff x x

Managers
Blah

Users
Blah

Group name

Administrators Group

Role

Select role ⌄

Description

Enter description

Managers

Available		Selected
Search 🔍		Search 🔍
Admin Superadmin		
Sales User1	>	
David Lewis		
David Proestos	⟩⟩	
James Baldwin		
Katie Gibson	⟨	
Marketing Creator		
Marketing Contributor	⟨⟨	
Marketing Manager		
D Lazorenko		
Dmitriy Develonica		
Sales User2		
Liz Fraim		
Nikki Huitsing		

Users

Available	Selected
Search 🔍	Search 🔍
Admin Superadmin	
Sales User1	

Users Page

Add a User

	Name	Email ⇅	Role	Groups	Status ⇅	
☐	**Admin Superadmin**	adm@local.dev	Administrator		ACTIVE	⋮
☐	**Sales User1**	SellerDL	Sales		ACTIVE	⋮
☐	**David Lewis**	DLewis	Marketing		ACTIVE	⋮
☐	**David Proestos**	DProestos	CEO		ACTIVE	⋮
☐	**James Baldwin**	jbaldwin	Chief Nerd		ACTIVE	⋮
☐	**Katie Gibson**	kgibson	Marketing Associate		ACTIVE	⋮
☐	**Marketing Creator**	Creator	Marketing Creator Warrior		ACTIVE	⋮
☐	**Marketing Contributor**	Contributor	Marketing Contributor		ACTIVE	⋮
☐	**Marketing Manager**	Manager	Marketing Manager and Approver		ACTIVE	⋮

Sales User1

Personal Information

Prefix	First name *	Last name	Suffix
None	Sales	User1	None

Account Information

Invite User

Login (email)*	Role	Member Of	Job title *
SellerDL	User	All Staff x x	Sales

Contacts Information

Phone number

Address	City	State

Postal Code	Country

Examples follow for clarity
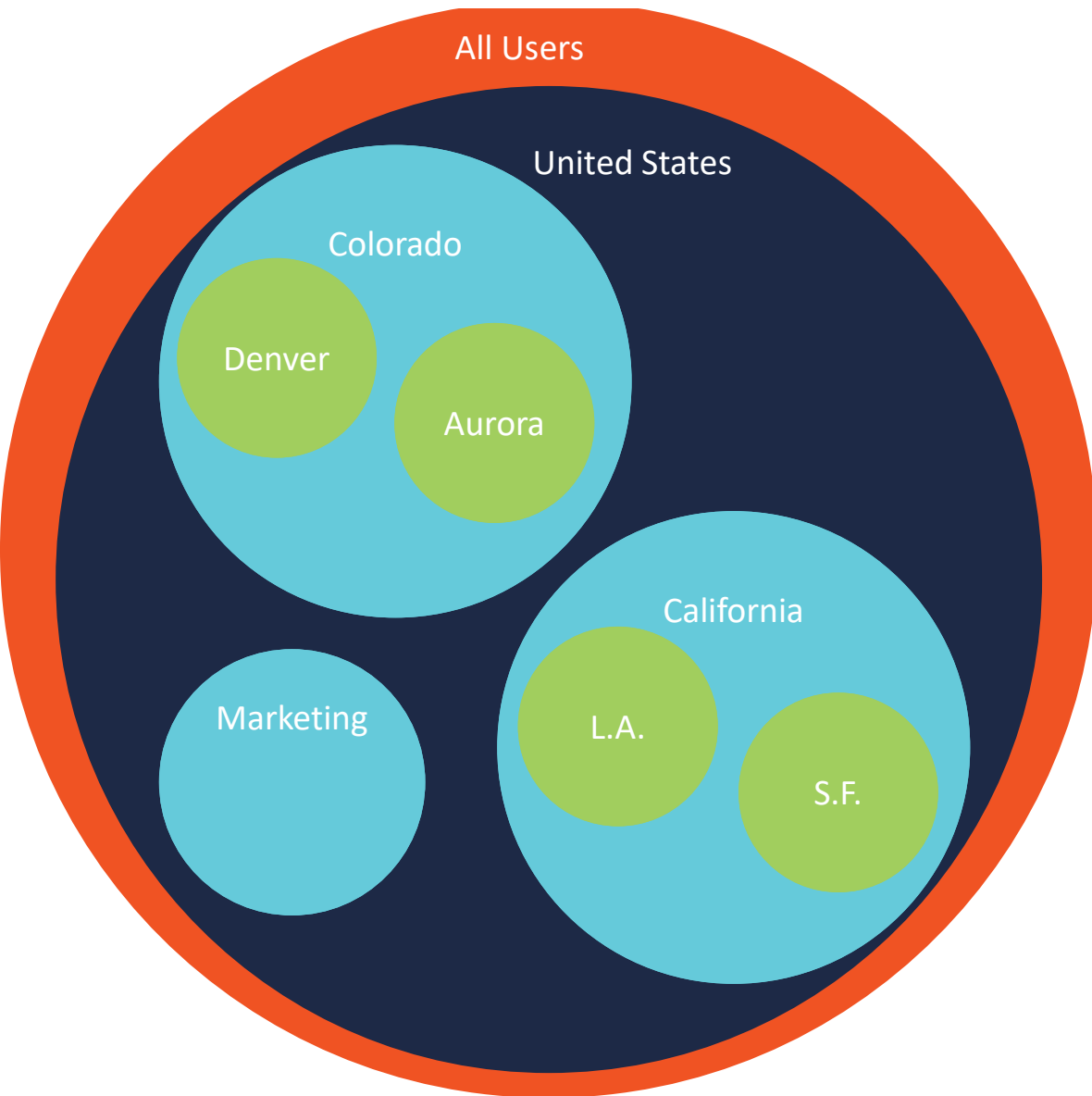
In this case, "All users" isn't strictly required, but enables future expansion

Group Manager/All Users
see and approve everything

Group Manager/US
see and approve everything US and below

Group Manager/Colorado
see and approve Colorado, Denver and Aurora

Group Manager/Denver
see and approve Denver
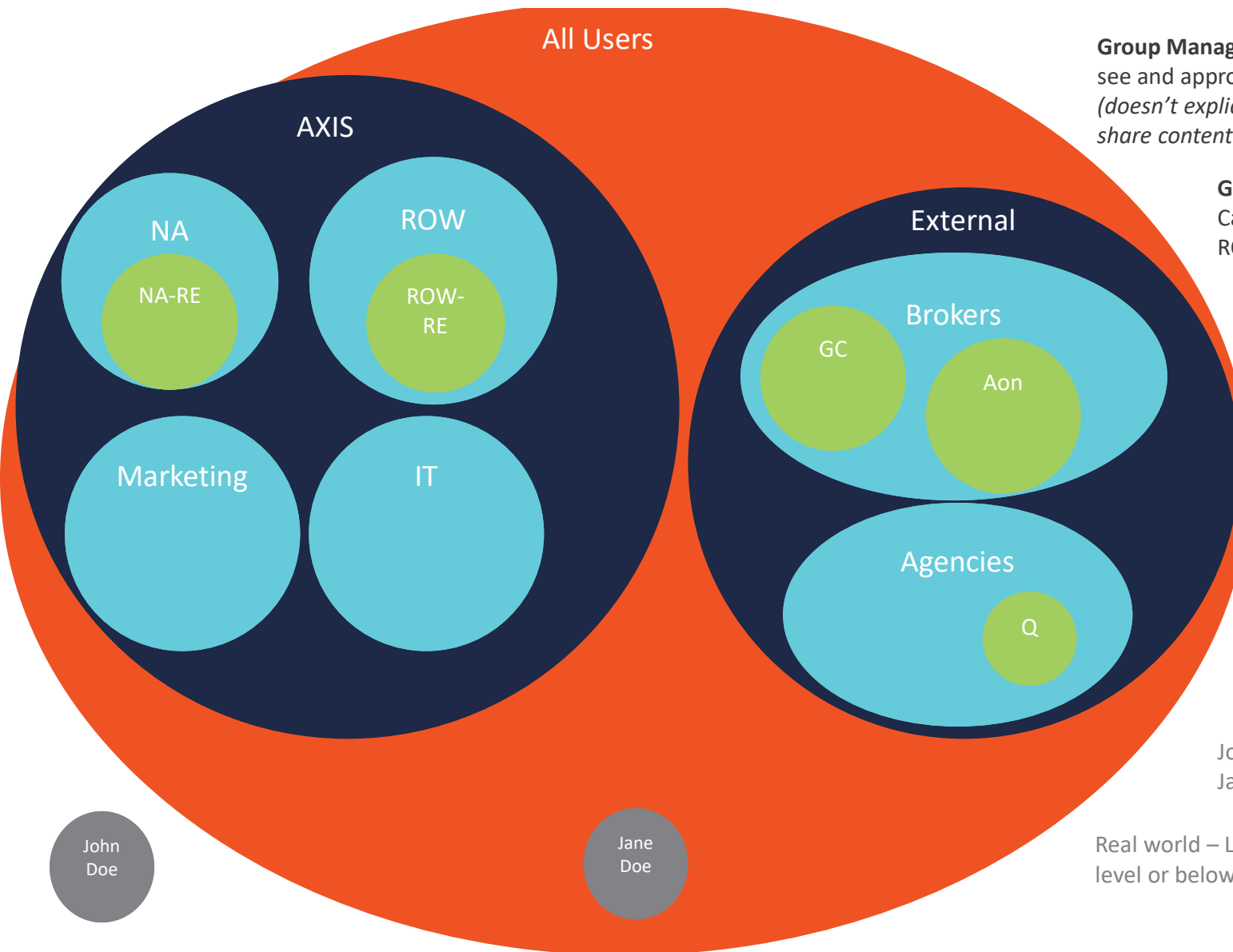**Group Manager/Marketing**
see and approve marketing

A User member of "All Users"
see published content with "All Users" in "Access List" only
CANNOT see published Playlists in US, Colorado, Denver, etc.

Replace "collaborators" in the UI with "Access List"

Playlist	Status	Access List	Seen by	Can be approved by
1	Draft	none	• The Playlist Creator • Manager (global) or above	Manager (global) or above
1	Published	none	• The Playlist Creator • Manager (global) or above	
2	Draft	United States	• The Playlist Creator • Manager (global) or above • Group Manager in US	• Creator • Manager (global) or above • Group Manager in US
2	Published	United States	• The Playlist Creator • Manager (global) or above • Members of US	
3	Draft	Denver	• The Playlist Creator • Group Managers in Denver, Colorado, United States • Managers (global) and up	• Group Mgrs: Denver, Colorado, US • Managers and up (global)
3	Published	Denver	• The Playlist Creator • Group members of Denver	• Group Mgrs: Denver, Colorado, US • Managers and up (global)
4	Draft	Colorado	• The Playlist Creator • Group Managers in Colorado, United States • Managers (global) and up	• Creator • Group Mgrs: Colorado, US • Managers (global) and up
4	Published	Colorado	• The Playlist Creator • Group members of Colorado	
5	Draft	Colorado, Marketing	• The Playlist Creator • Group Managers in Colorado, United States, Marketing • Managers (global) and up	• Creator • Group Mgrs: Colorado, Marketing, US • Managers (global) and up
5	Published	Colorado, Marketing	• The Playlist Creator • Group Managers in Colorado, United States, Marketing • Managers (global) and up • Members of Colorado OR Marketing	

Group Manager/All Users:
see and approve everything
(doesn't explicitly need to be created unless you want to share content to internal and external by using "All Users")

Group Manager/AXIS:
Can see and approve AXIS, NA, NA-RE, ROW, ROW-RE, Marketing, IT

Group Manager/NA:
Can see and approve NA, NA-RE

Group Manager/NA-RE:
Can see and approve NA-RE

Member of Aon:
• If assigned only to "Aon", can only see content tagged "Aon"
• In real world, could also be added to "External" to see published content in external and/or "Brokers" to see "Brokers" content.

John Doe has no group
Jane Doe is in "All Users" group

Real world – Likely to be no group managers in "Broker" level or below, only users

Replace "collaborators" in the UI with "Visibility"

Playlist	Status	Visibility	Seen by	Can be approved by
1	Draft	none	• Creator • Manager (global) or above	Manager (global) or above
1	Published	none	• Creator • Manager (global) or above	
2	Draft	All	• Creator • Manager (global) or above • Group Managers in All	
2	Published	All	• Creator • Manager (global) or above • Group Managers in All • Users in All	
3	Draft	AXIS	• Creator • Group Managers in All, AXIS • Managers (global) and up	• Creator • Group Managers in All, AXIS • Managers (global) and up
3	Published	AXIS	• Creator • Members of AXIS	
4	Draft	Marketing, Aon	• Creator • Group Manager in Marketing, Axis, Aon, Brokers, External, All Users • Managers (global) and up	• Creator • Group Manager in Marketing, Axis, Aon, Brokers, External, All Users • Managers (global) and up
4	Published	Marketing, Aon	• Creator • Group members in Marketing, Aon	