

PoliteMail User Roles

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Applies To: ■ PoliteMail Desktop ■ PoliteMail Online ■ PoliteMail M365

Version: ■ 4.9 ■ 5.0 ■ 5.1+

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

	SysAdmin	Admin	Manager	User
<i>Users</i>	All	All	Region/Business	Self only
<i>Lists</i>	All	All	Region/Business	Self only (unless shared)
<i>Content</i>	All	All	Region/Business	Self only (unless shared)
<i>Reports</i>	Any	Any	Region/Business	Self only (can be emailed/exported)
<i>Private Content</i>	Yes	Yes	Self only	Self only
<i>Unassigned Content</i>	All	All	All	Self only (unless Owner is set to All Users)
<i>Settings</i>	All	Expanded	User Prefs only	User Prefs only

Notes

- Most primary administrators of PoliteMail should be Admins and not SysAdmins; System Administrators have access to ALL settings, including those that can potentially break PoliteMail unless the SysAdmin knows what they're doing!
- By default, PoliteMail users must ~~share any content or lists they create~~ if they want them to be accessible to any other users. To create an "open sharing" account, it is recommended to set all users to Admins.
- Admins and SysAdmins have full control over sharing settings and can assign content to any users or ~~Groups~~, while Managers have control only over content, reports, and users within their Group(s).
- If Unassigned content is assigned a Group by someone and the Owner is set to All Users, it will be accessible by all members of the Group automatically. Otherwise, the Owner will need to manually set the sharing.
- By default, any content a 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.