

## **Edit or Delete a Role**

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If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence.

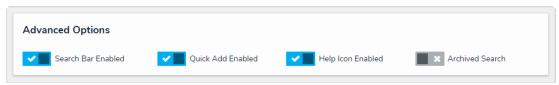
## To edit or delete a role:

- 1. Click the ☆ icon in the top bar > **Roles** in the **People** section.
- 2. Enter the name of the role in the text field to search for it or click the role you want to edit.
- 3. To add more object types to the role, select the object types from the dropdown menu in the **Object Types** section, then edit the permissions.
- 4. To edit an existing object type's permissions, click the object type under **Object Types**, make your changes as needed, then click **Done** to return to the **Edit Role** page.
- To add more users or groups to the role, select them from the dropdown menus under Users and Groups.
- 6. To delete an object type, user, or user group from the role, click the click to the object type, user, or user group you want to delete, then click **Yes** to confirm.



Roles determine a user's eligibility to access objects only. Removing a user from a role with explicit permissions after they've been granted direct access to an object does **not** automatically revoke their access to that object. Another user with the appropriate permissions must revoke access by removing the user from the role field on the object's form.

- 7. **Optional:** In the Advanced Options section, click the or license or license icons to enable or disable the following options for users within the role:
  - **Search Bar Enabled:** Shows or hides the Search field from the top bar.
  - Quick Add Enabled: Shows or hides the Quick Add feature from the top bar.
  - **Help Icon Enabled:** Shows or hides the link to the Resolver Knowledge Base from the top bar.
  - **Archived Search:** Shows or hides the option to include archived data in the search results when using the **Search** function.



The Advanced Options section.

8. To delete the role, click the icon, then click **Yes** to confirm.