

Create a New Role

Last Modified on 12/11/2024 4:33 pm EST

Overview

Roles control the data that users can create, edit, delete, view, or manage in Resolver by adding individual [users](#) or [user groups](#) to a role, selecting the object type(s) those users can see, applying either **global** or **explicit** permissions, then configuring the workflow permissions for each object type added to the role.



Note:

If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence. You can review which roles an individual user has been added to from the **User Memberships** section on the **Edit User** screen.

User Account Requirements

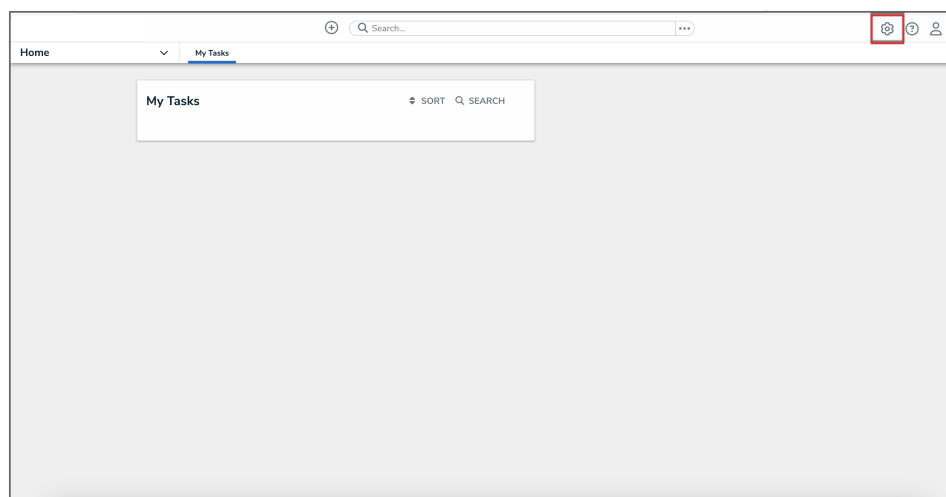
The user must have Administrator permissions to access the **Data Access** section in the **Admin Overview** screen.

Related Information/Setup

Please refer to the [Roles Overview](#) article for more information on using roles in Resolver.

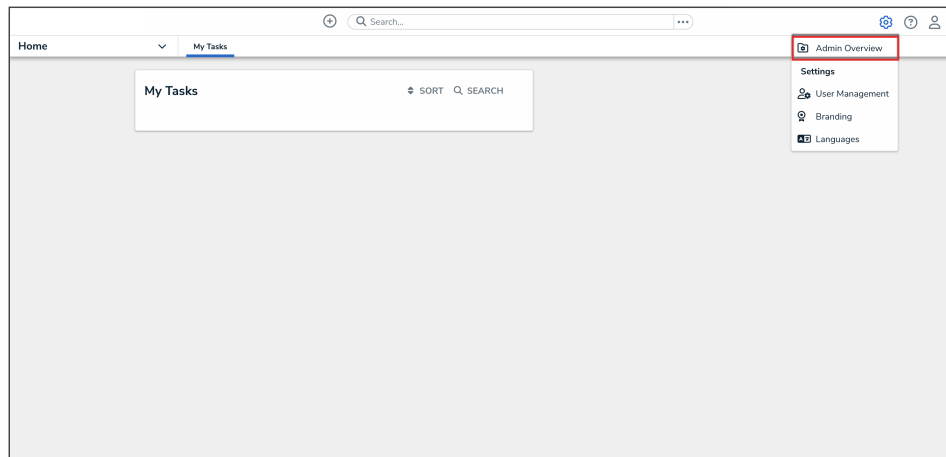
Navigation

1. From the **Home** screen, click the **Administration** icon.



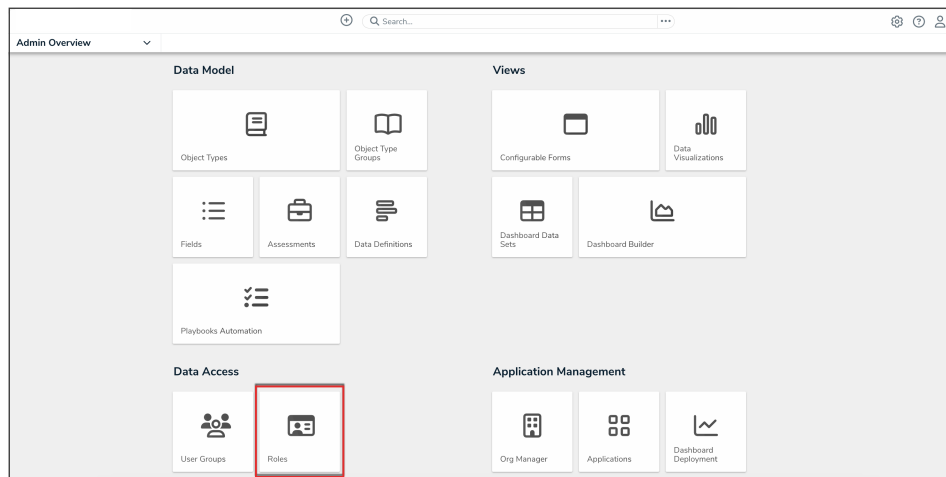
Administration Icon

- From the **Administrator settings** menu, click **Admin Overview**.



Administrator Settings Menu

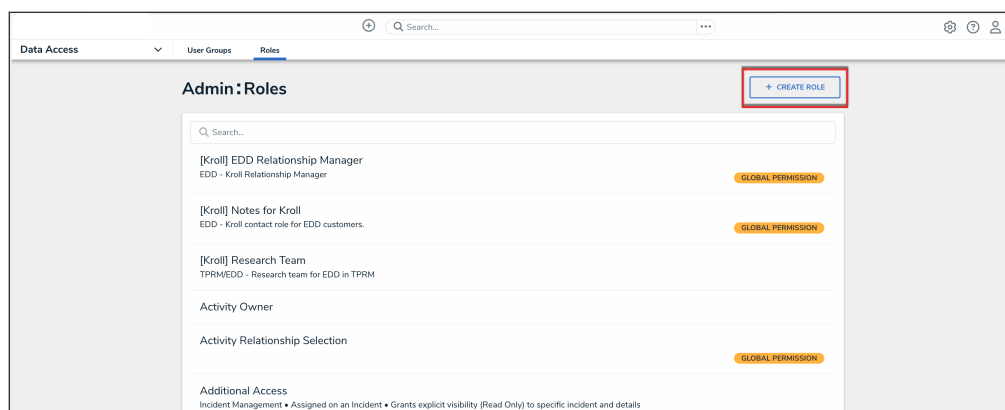
- From the **Admin Overview** screen, click the **Roles** tile under the **Data Access** section.



Roles Tile

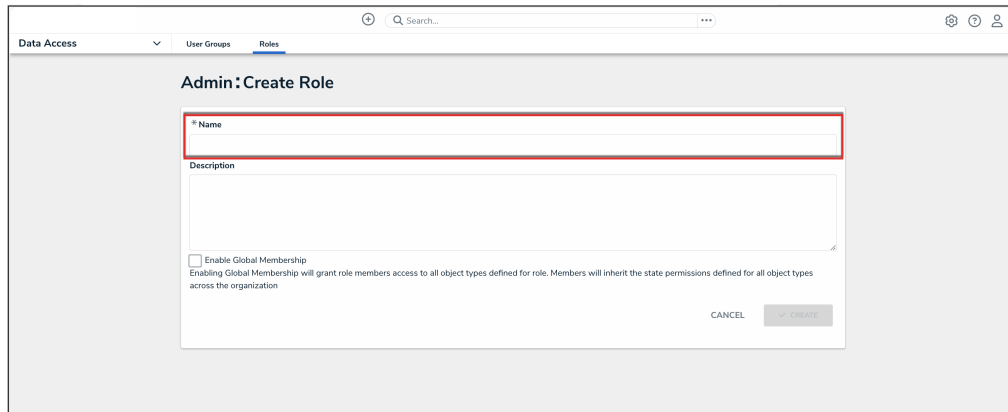
Creating a New Role

- From the **Roles** screen, click the **Create Role** button.



Create Role Button

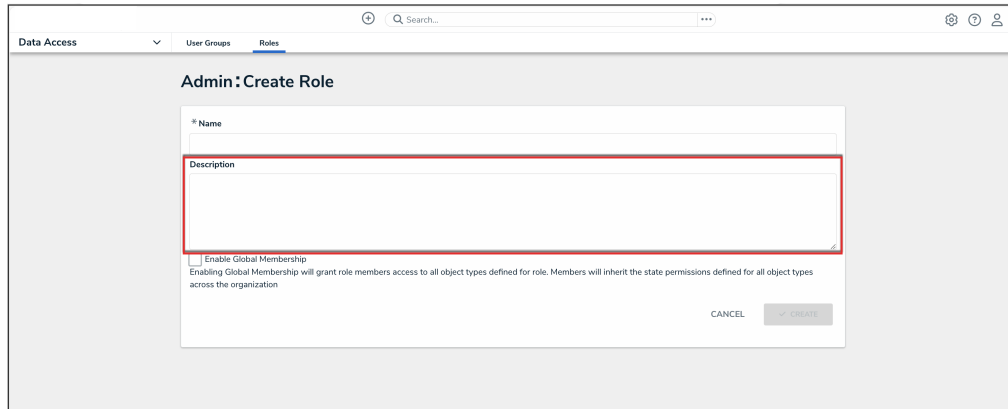
2. Enter the name for the role in the **Name** field.



The screenshot shows the 'Admin: Create Role' form in a web application. The form has a header bar with 'Data Access', 'User Groups', and 'Roles' tabs. Below the header, the title 'Admin: Create Role' is displayed. The form contains three main sections: a 'Name' field (highlighted with a red border), a 'Description' field, and a checkbox labeled 'Enable Global Membership'. The 'Name' field is the first input field, and the 'Description' field is a larger text area below it. The 'Enable Global Membership' checkbox is at the bottom of the form, with a small text description below it. The form also includes 'CANCEL' and 'CREATE' buttons at the bottom right.

Name Field

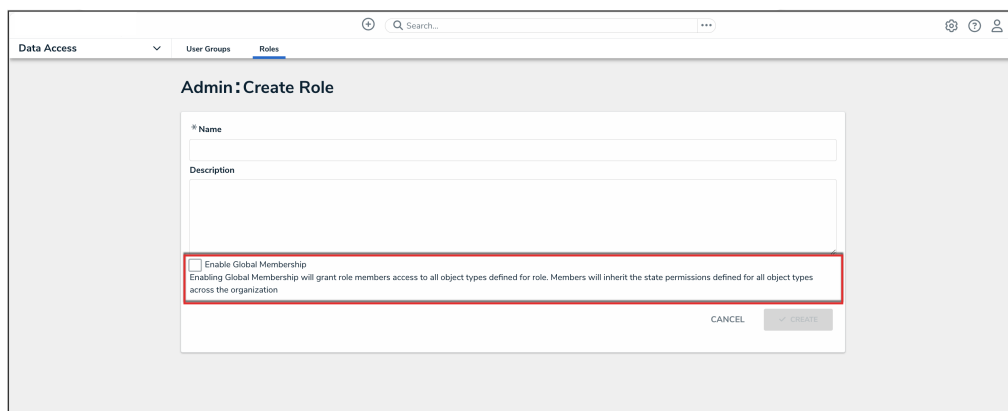
3. **(Optional):** Enter a description of the role in the **Description** field. This description will appear below the role's name when editing it.



The screenshot shows the 'Admin: Create Role' form. The 'Name' field is now filled with text, and the 'Description' field (highlighted with a red border) is the next input field. The 'Enable Global Membership' checkbox and its description are still visible at the bottom of the form. The 'CANCEL' and 'CREATE' buttons are at the bottom right.

Description Field

4. **(Optional):** Select the **Enable Global Membership** checkbox if you wish to grant this role global permissions.



The screenshot shows the 'Admin: Create Role' form. The 'Name' and 'Description' fields are now filled with text. The 'Enable Global Membership' checkbox (highlighted with a red border) is the next input field. The checkbox is currently unchecked. The text description below the checkbox is visible. The 'CANCEL' and 'CREATE' buttons are at the bottom right.

Enable Global Membership Checkbox



Note:

Once a role is created, you cannot enable or disable global membership (permissions) from the **Edit Roles** screen. To enable or disable global permissions on an existing role, you must delete then recreate the role.

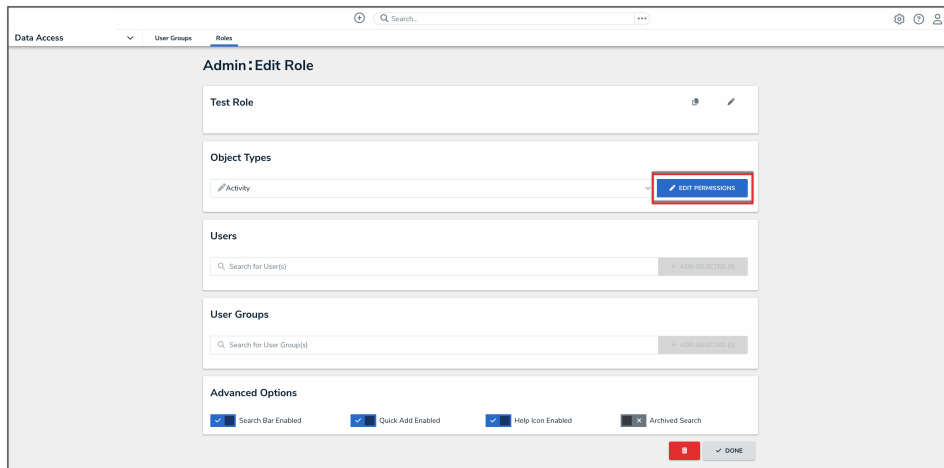
- Click the **Create** button.

Create Button

- In the field under **Object Types**, type the name of the object type you want to add, then press **Enter** on your keyboard or select it from the dropdown menu.

Object Types Field

- Click the **Edit Permissions** button to configure the workflow permissions.



Edit Permissions Button



Note:

An object type will not be saved to a role until you've configured its workflow permissions.

8. Select the [workflow permissions](#) the user will have per each state:
 - **All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these permissions for all states in the workflow.
 - **All Triggers:** Users can view and click all [triggers](#) on a form. The triggers that are visible to user depend on whether the object is in the state associated with the trigger. You can also select each individual trigger to grant access.
 - **Create:** Users can create a new object. This permission applies only to the Creation state of the object type.
 - **Read:** Users can view the object when it's in the selected state. You cannot select the **Edit**, **Delete**, or **Manage** permissions unless **Read** has been selected.
 - **Edit:** Users can edit existing objects in the selected state.
 - **Delete:** Users can delete existing objects in the selected state.
 - **Manage:** Users can add users from other roles to give them access to the object while it's in the selected state. Note that the added user will not see the object until it's in a state they have permission to view. **Manage** is applicable to explicit permissions only.
 - **Assign:** Once the object is in the selected state, users who have been granted permission to view the object through a role will see it in their task list on the [My Tasks](#) page. **Assign** is applicable to explicit permissions only.

Edit Permissions Screen

- From the **Select a default form for this state for this role** dropdown menu, choose the form users will see when using [Search](#), [Quick Add](#), an [assessment table](#), or [relationship graph](#).

Select a Default Form For This State For This Role Dropdown

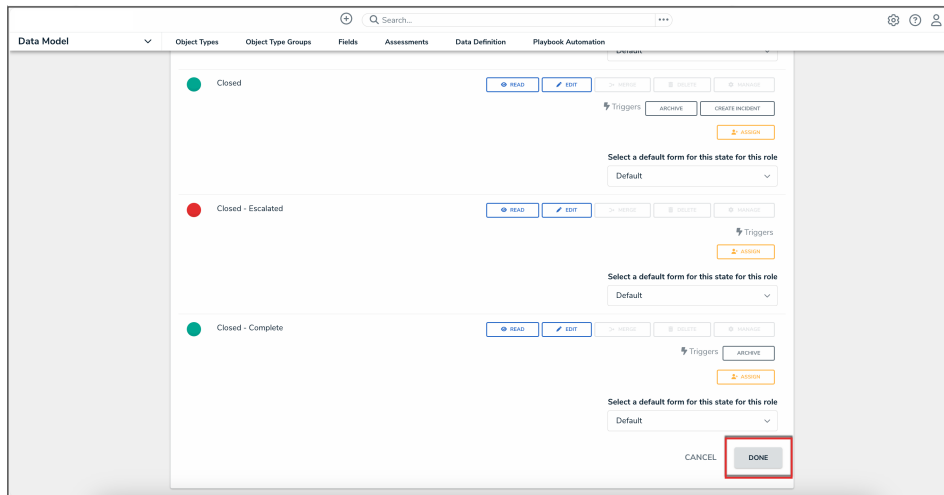
- If you **do not** choose a form from this dropdown menu, the object type's default form (the unconfigured list of components added to an object type) will be displayed.
- If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator.
- If you select a configurable form from this dropdown menu, the selected form will be displayed.



Note:

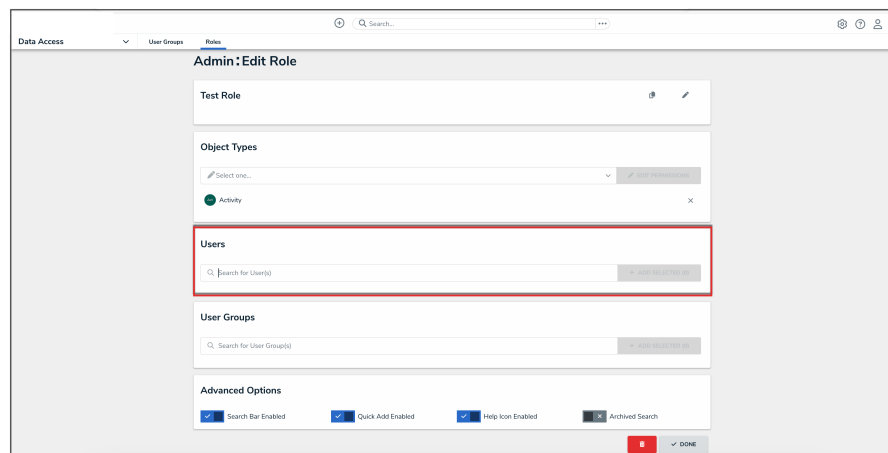
Forms selected to display on an action, view, data visualization, or relationship table will override any selections made in the **Select a default form for this state for this role** field.

- Click the **Done** button to save your changes.



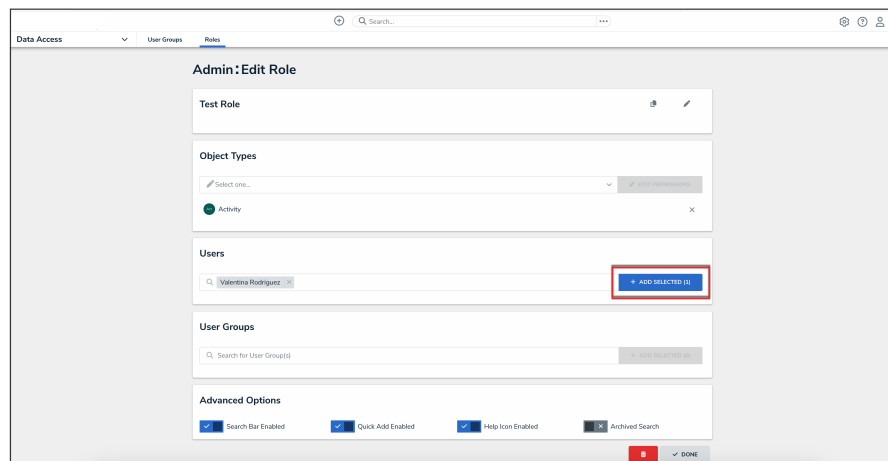
Done Button

11. Repeat steps 6-10 to continue adding object types as needed.
12. To add individual users to the role:
 - a. In the field under **Users**, begin typing the name of the user you want to add to the role in, then press **Enter** on your keyboard or click to select the user.



Users Field

- b. Repeat as needed to add more users, then click the **Add Selected** button.



Add Selected Button

13. To add a **user group** to the role:

- In the field under **User Groups**, begin typing the name of the user group you want to add to the role, then press **Enter** on your keyboard or click to select the user group.

The screenshot shows the 'Admin: Edit Role' interface. The 'User Groups' field is highlighted with a red box. The field contains a search bar with the placeholder text 'Search for User Group(s)' and an 'ADD SELECTED (0)' button. Below the field, there are 'Advanced Options' with checkboxes for 'Search Bar Enabled', 'Quick Add Enabled', 'Help Icon Enabled', and 'Archived Search'.

User Groups Field

- Repeat as needed to add more user groups, then click the **Add Selected** button.

The screenshot shows the 'Admin: Edit Role' interface. The 'User Groups' field now contains the text 'Activity Owner (Limited User)' and the 'ADD SELECTED (1)' button is highlighted with a red box. The 'Advanced Options' section remains visible at the bottom.

Add Selected Button

- (Optional):** In the **Advanced Options** section, you can select which advanced options to enable or disable for users within the role. Please refer to the [Advanced Options on Roles](#) article for more information.
- Click the **Done** button to save your changes.

Data Access

User Groups

Roles

Search...

Admin: Edit Role

Test Role

Object Types

Users

User Groups

Advanced Options

✓ Search Bar Enabled

✓ Quick Add Enabled

✓ Help Icon Enabled

✗ Archived Search

✗

✓ DONE

Done Button