

Assigning Advanced Permissions to a User

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Overview

Administrators can grant Standard users limited access to use some administrative features by assigning them advanced permissions.

For a full list of permissions that each advanced permissions type grants the user, please read the [Advanced Permissions Types](#) article. The five types of advanced permissions are:

- **Data Import Management:** Manage data imports and reassign data
- **Data Management:** Manage reports and dashboards
- **Settings Management:** Manage all tasks under the Administrator Settings menu
- **User Impersonation:** Impersonate users
- **User Management:** Create, manage, and assign user accounts, group memberships, and roles within the system

Related Information/Setup

For more information on creating and editing a user, please refer to the [Creating a New User](#) and [Editing a User](#) articles.

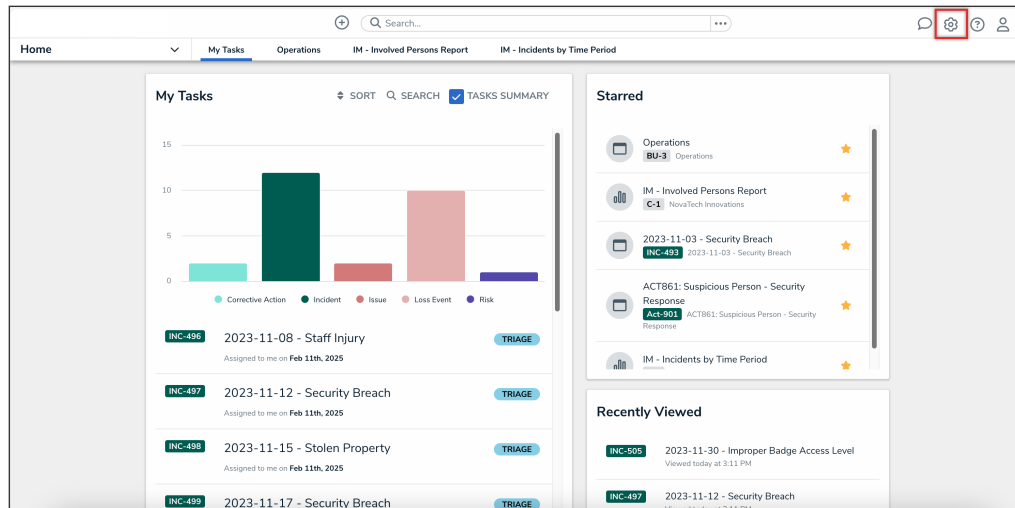
For a full list of permissions that each advanced permissions type grants the user, please refer to the [Advanced Permissions Types](#) article.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions to assign advanced permissions.

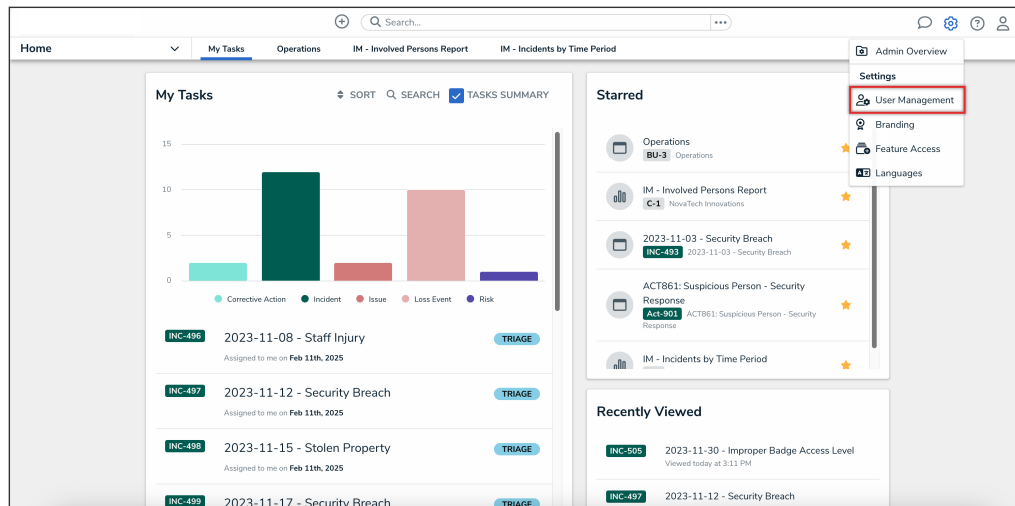
Navigation

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



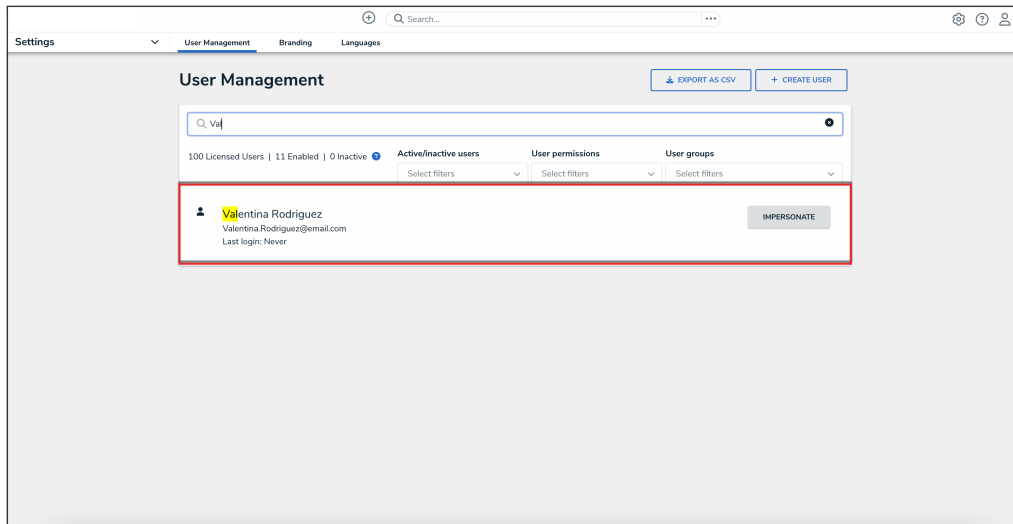
Administration Icon

- From the **Administrator Settings** menu, click the **User Management** link.



Administrator Settings Menu

- Enter a user's name in the **Search** field to narrow the search results.
- Click the user's name you want to assign advanced permissions to.



User Name

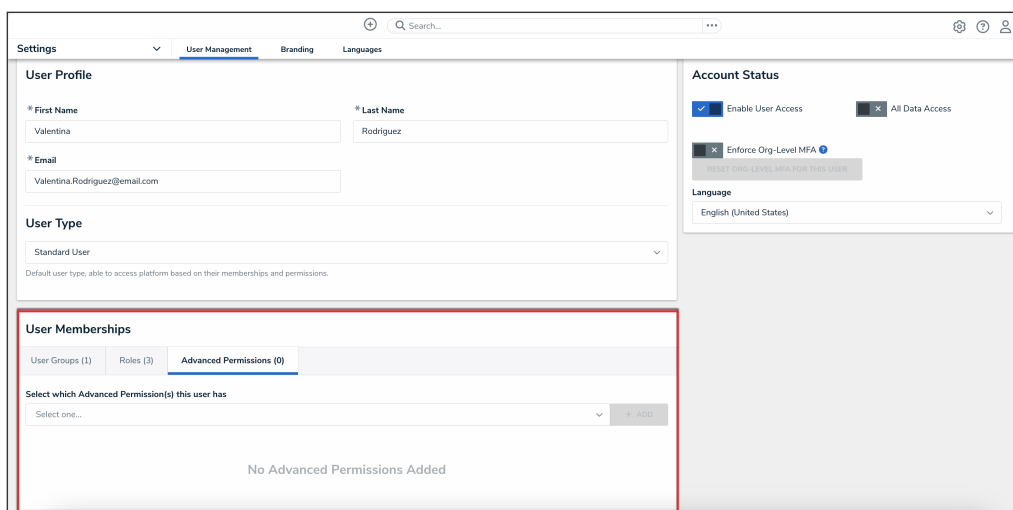
Assigning Advanced Permissions to a User



Note:

Administrators can only grant advanced permissions to a **Standard** user.

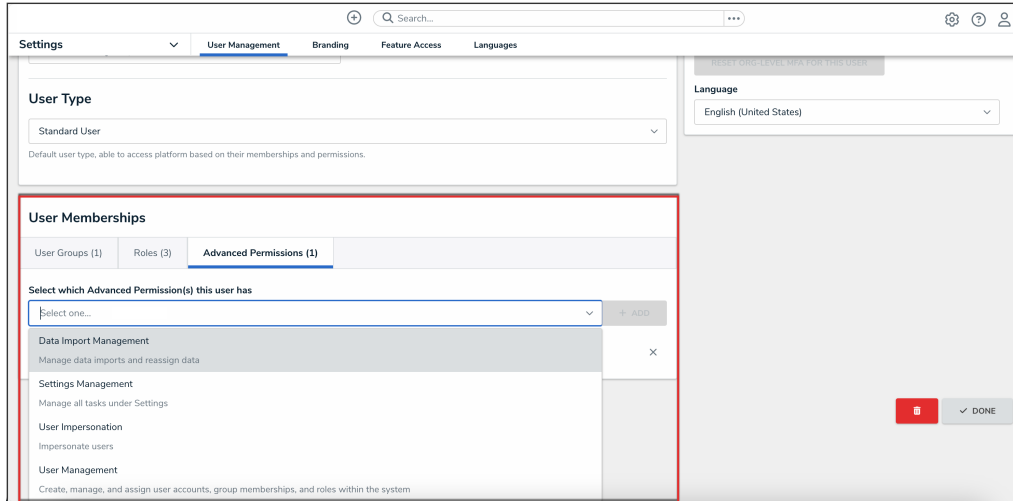
1. From the **Edit User** screen, in the **User Memberships** card, click the **Advanced Permissions** tab.



User Memberships Card

2. From the **Select which Advanced Permission(s) this user has** dropdown, select one of the following options:
 - **Data Import Management:** Manage data imports and reassign data
 - **Data Management:** Manage reports and dashboard

- **Settings Management:** Manage all tasks under the Administrator Settings menu
- **User Impersonation:** Impersonate users
- **User Management:** Create, manage, and assign user accounts, group memberships, and roles within the system



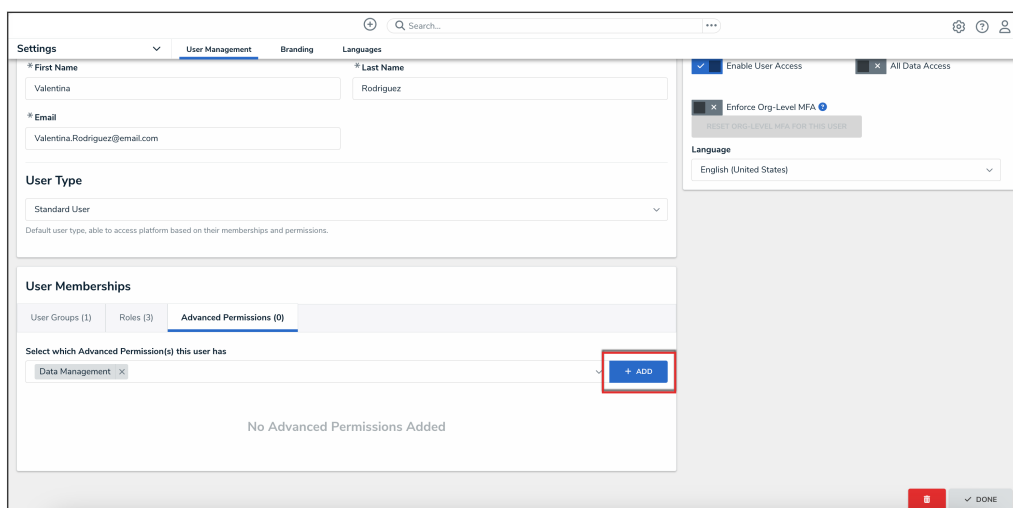
Advanced Permissions Dropdown



Note:

For a full list of permissions that each advanced permissions type grants the user, please refer to the [Advanced Permission Types](#) article.

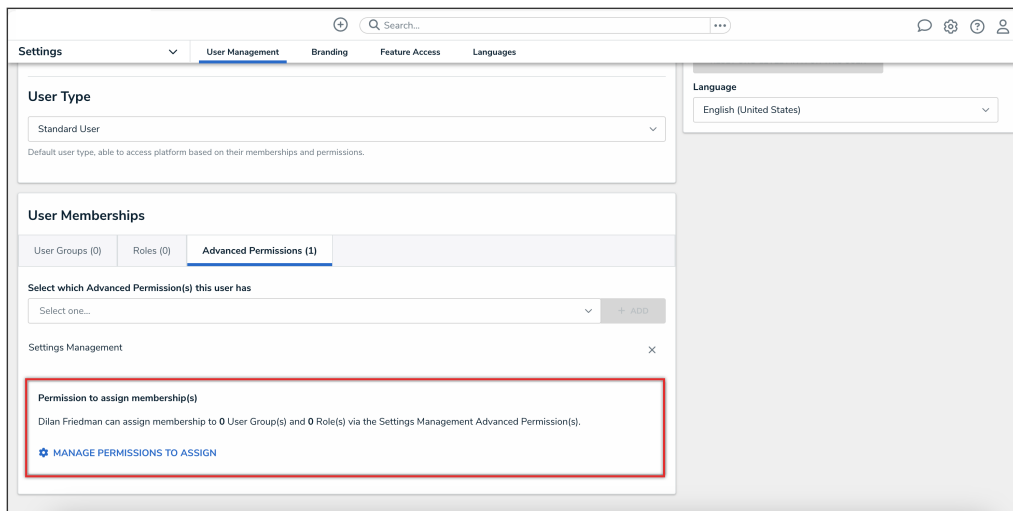
3. Click the **Add** button to grant that user the selected advanced permissions.



Add Button

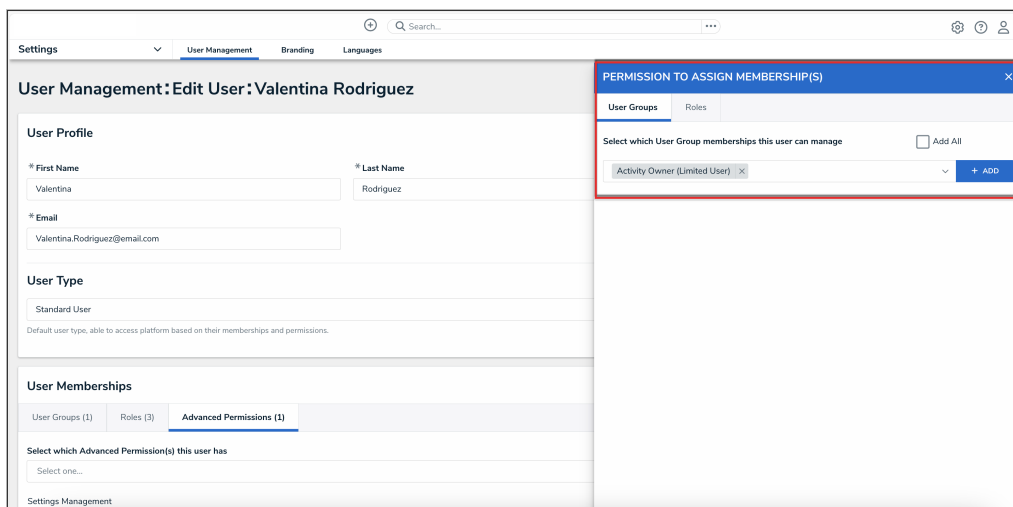
4. For the **Settings Management** advanced permission, Administrators will have to further configure which user groups and roles the user will be able to assign to other users. Under

Permission to Assign Membership(s) , click the **Manage Permissions to Assign** link.



Manage Permissions to Assign Link

- From the **User Groups** tab, in the **Select which User Group memberships this user can manage** dropdown, enter a user group name and select a user group or multiple user groups.



User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user is assigned to manage.
- (Optional):** Click the **Add All** checkbox to select all available user groups, allowing the user to manage all user groups in the system.
- From the **Roles** tab, in the **Select which Role memberships this user can manage** dropdown, enter a role name and select a role or multiple roles.

The screenshot shows the 'User Management: Edit User: Valentina Rodriguez' form. On the right, a modal titled 'PERMISSION TO ASSIGN MEMBERSHIP(S)' is open. The 'Roles' tab is selected, and the 'Add All' checkbox is checked. The modal also shows a dropdown for 'Select which Role memberships this user can manage' and an 'Add' button.

Roles Tab

- Click the **Add** button to add all selected roles to the list of roles the user is assigned to manage.
- **(Optional):** Click the **Add All** checkbox to select all available roles, allowing the user to manage all roles in the system.



Note:

*Users with the **Settings Management** advanced permission will only have access to edit the user group memberships of the user groups and the roles that they have been assigned to manage.*

- For the **User Management** advanced permission, Administrators will have to further configure which user groups and roles the user will be able to assign to other users. Under **Permission to Assign Membership(s)**, click the **Manage Permissions to Assign** link.

The screenshot shows the 'User Management' form with the 'Advanced Permissions (1)' tab selected. A modal titled 'Permission to assign membership(s)' is open, showing that 'Dilan Friedman can assign membership to 0 User Group(s) and 0 Role(s) via the User Management Advanced Permission(s)'. A red box highlights the 'MANAGE PERMISSIONS TO ASSIGN' link.

Manage Permissions to Assign Link

- From the **User Groups** tab, in the **Select which User Group memberships this user can manage** dropdown, enter a user group name and select a user group or multiple user groups.

The screenshot shows the 'User Management: Edit User: Valentina Rodriguez' page. The 'User Profile' section includes fields for First Name (Valentina), Last Name (Rodriguez), and Email (Valentina.Rodriguez@email.com). The 'User Type' is 'Standard User'. The 'User Memberships' section has tabs for 'User Groups (1)', 'Roles (3)', and 'Advanced Permissions (1)'. The 'Advanced Permissions (1)' tab is active, showing a dropdown for 'Select which Advanced Permission(s) this user has' and an 'Add' button. A modal titled 'PERMISSION TO ASSIGN MEMBERSHIP(S)' is open, with the 'User Groups' tab selected. The modal contains a dropdown for 'Select which User Group memberships this user can manage' and an 'Add All' checkbox, which is checked.

User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user is assigned to manage.
- (Optional):** Click the **Add All** checkbox to select all available user groups, allowing the user to manage all user groups in the system.
- From the **Roles** tab, in the **Select which Role memberships this user can manage** dropdown, enter a role name and select a role or multiple roles.

The screenshot shows the 'User Management: Edit User: Valentina Rodriguez' page. The 'User Profile' section includes fields for First Name (Valentina), Last Name (Rodriguez), and Email (Valentina.Rodriguez@email.com). The 'User Type' is 'Standard User'. The 'User Memberships' section has tabs for 'User Groups (1)', 'Roles (3)', and 'Advanced Permissions (1)'. The 'Advanced Permissions (1)' tab is active, showing a dropdown for 'Select which Advanced Permission(s) this user has' and an 'Add' button. A modal titled 'PERMISSION TO ASSIGN MEMBERSHIP(S)' is open, with the 'Roles' tab selected. The modal contains a dropdown for 'Select which Role memberships this user can manage' and an 'Add All' checkbox, which is checked.

Roles Tab

- Click the **Add** button to add all selected roles to the list of roles the user is assigned to manage.
- (Optional):** Click the **Add All** checkbox to select all available roles, allowing the user to manage all roles in the system.



Note:

*Users with the **User Management** advanced permission will only have access to edit the user group memberships of the user groups and the roles that they have been assigned to manage.*

- For the **User Impersonation** advanced permission, Administrators will have to further configure which users the user will be able to impersonate. Under **Permission to impersonate**, click the **Manage Permissions to Assign** link.



Note:

*Users with the **User Impersonation** advanced permission will only be able to impersonate Standard users without any advanced permissions.*

The screenshot shows the Resolver User Management interface. The 'User Management' tab is selected. Under 'User type', 'Standard User' is chosen. The 'User Memberships' section has three tabs: 'User Groups (1)', 'Roles (3)', and 'Advanced Permissions (1)'. The 'Advanced Permissions (1)' tab is active. It shows a dropdown for 'Select which Advanced Permission(s) this user has' with a '+ ADD' button. Below this, the 'User Impersonation' section is expanded, showing a red box around the 'Permission to impersonate' link. The text below the link states: 'Valentina Rodriguez can impersonate users from 0 User Group(s) and 0 Role(s) via the User Impersonation Advanced Permission(s)'. At the bottom right of the interface is a red 'DONE' button.

Manage Permissions to Impersonate Link

- From the **User Groups** tab, in the **Select which User Group memberships this user can impersonate other users from** dropdown, enter a user group name and select a user group or multiple user groups.

The screenshot shows the Resolver User Management interface. The main page is titled "User Management: Edit User: Valentina Rodriguez". It has a sidebar with "Settings" and "User Management" (selected). The main content area has tabs for "User Profile", "User Type", and "User Memberships". The "User Profile" tab is active, showing fields for First Name (Valentina), Last Name (Rodriguez), and Email (Valentina.Rodriguez@email.com). The "User Type" is set to "Standard User". The "User Memberships" tab is also active, showing "User Groups (1)", "Roles (3)", and "Advanced Permissions (1)". A modal titled "PERMISSION TO IMPERSONATE" is open, with the "User Groups" tab selected. It contains a checkbox for "Add All" and a dropdown menu for "Select one...".

User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user can impersonate.
- **(Optional):** Click the **Add All** checkbox to select all available user groups, allowing the user to impersonate all user groups in the system.
- From the **Roles** tab, in the **Select which Role memberships this user can impersonate other users from** dropdown, enter a role name and select a role or multiple roles.

The screenshot shows the Resolver User Management interface. The main page is titled "User Management: Edit User: Valentina Rodriguez". It has a sidebar with "Settings" and "User Management" (selected). The main content area has tabs for "User Profile", "User Type", and "User Memberships". The "User Profile" tab is active, showing fields for First Name (Valentina), Last Name (Rodriguez), and Email (Valentina.Rodriguez@email.com). The "User Type" is set to "Standard User". The "User Memberships" tab is also active, showing "User Groups (1)", "Roles (3)", and "Advanced Permissions (1)". A modal titled "PERMISSION TO IMPERSONATE" is open, with the "Roles" tab selected. It contains a checkbox for "Add All" and a dropdown menu for "Select one...".

Roles Tab

- Click the **Add** button to add all selected roles to the list of roles the user can impersonate.
- **(Optional):** Click the **Add All** checkbox to select all available roles, allowing the user to impersonate all user groups in the system.

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

Settings

User ManagementBrandingLanguages

User Profile

* First Name

Valentina

* Last Name

Rodriguez

* Email

Valentina.Rodriguez@email.com

User Type

Standard User

Default user type, able to access platform based on their memberships and permissions.

User Memberships

User Groups (1)Roles (3)Advanced Permissions (1)

Select which Advanced Permission(s) this user has

Select one...+ ADD

Data ManagementX

Account Status

☒ Enable User Access

☒ All Data Access

☒ Enforce Org-Level MFA

RESET ORG-LEVEL MFA FOR THIS USER

Language

English (United States)

1

✓ DONE

Done Button