

Add a Clear Roles Action to a Transition

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Overview

The **Clear Roles** action clears the values from selected fields on a form (excluding formulas). This is particularly helpful to users who are working with existing assessments because they avoid the need to go into the assessment and manually remove data that's no longer applicable.

For example, the **Clear Roles** action may be used when assigning an object type or assessment to a new user in a different role.

Before you can create this action on a workflow state, the fields must be added to the object type as components and a transition must be created.



Note:

Avoid using the **Clear Roles** and **Role Management** action on the same transition. The **Clear Roles** action clears all roles from a form.

User Account Requirements

The user must have Administrator permissions to access the **Admin Overview** screen.

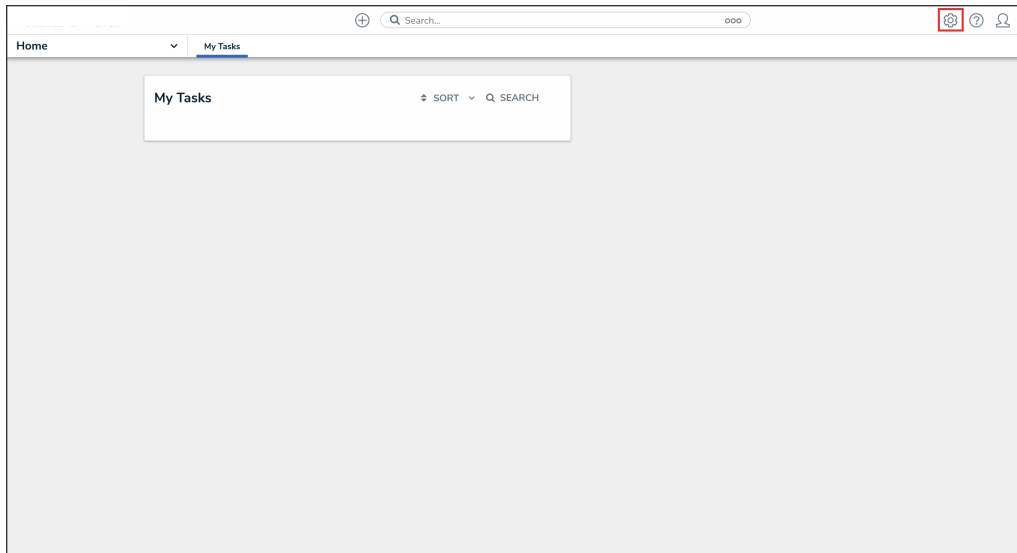
Required Information/Setup

Please refer to the [Add a Trigger & Transition to a State](#) article for instructions on how to add triggers and transitions.

Please refer to the [Roles](#) and [Workflow Permissions](#) sections for more information on configuring roles and workflow permissions.

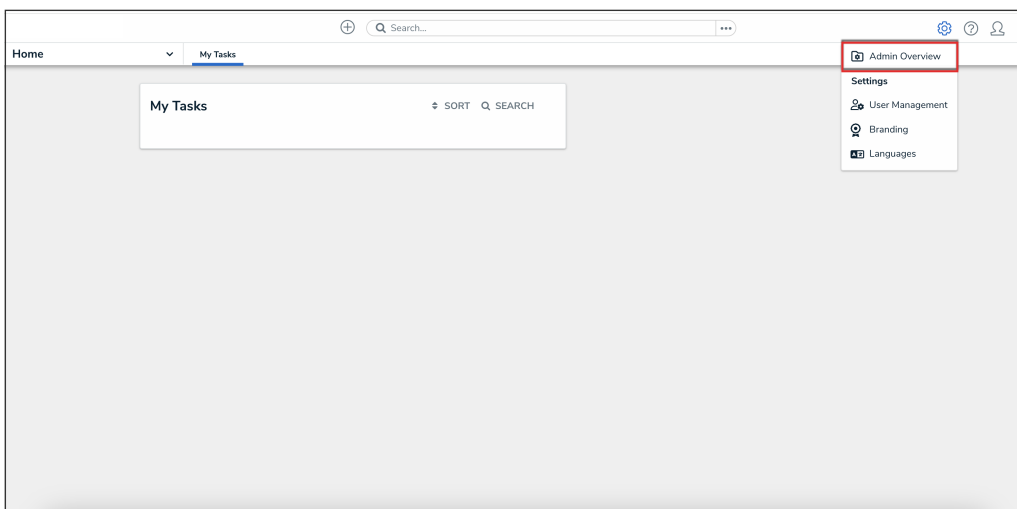
Navigation

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



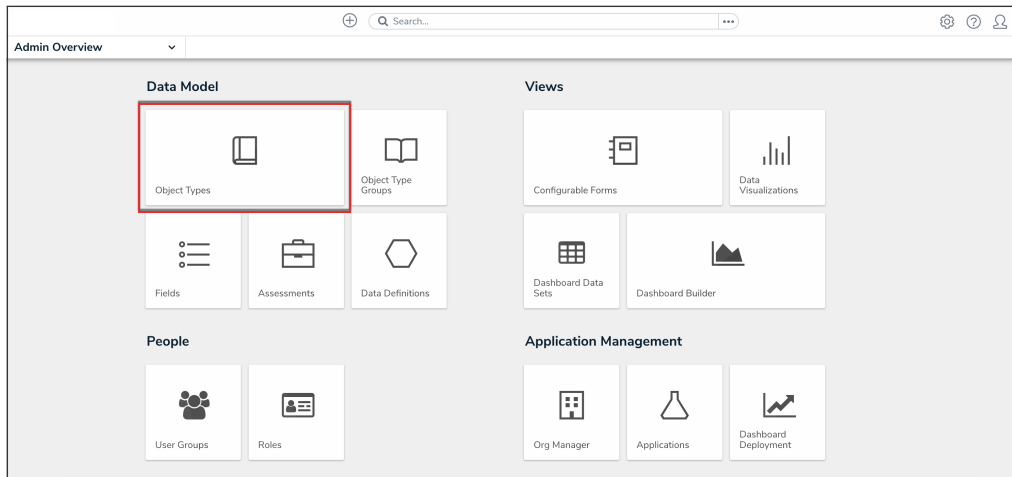
Administration Icon

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



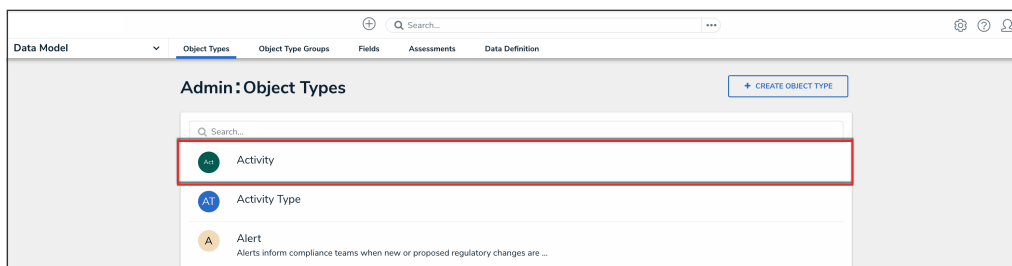
Administrator Settings Menu

- From the **Admin Overview** screen, click the **Object Types** tile under the **Data Model** section.



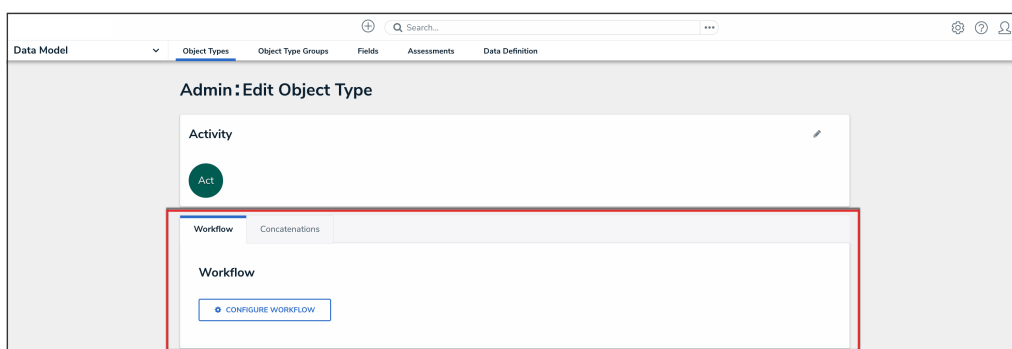
Object Types Tile

4. From the **Object Types** screen, enter an object type name in the **Search** field to narrow down the object types list.
5. Click the object type name you want to edit.



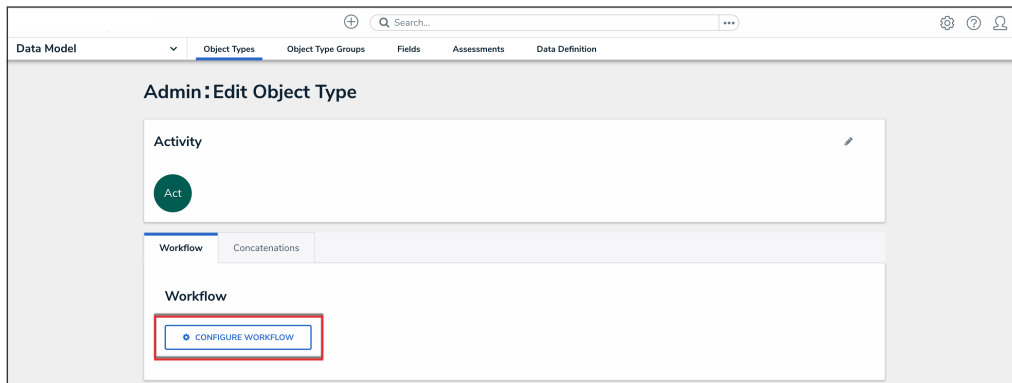
Object Type Name

6. From the **Edit Object Type** screen, click a workflow under the **Workflow** tab.



Workflow Tab

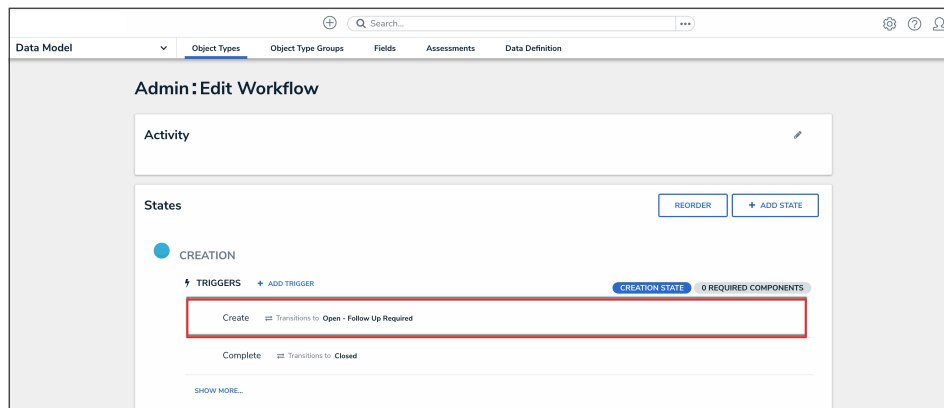
7. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

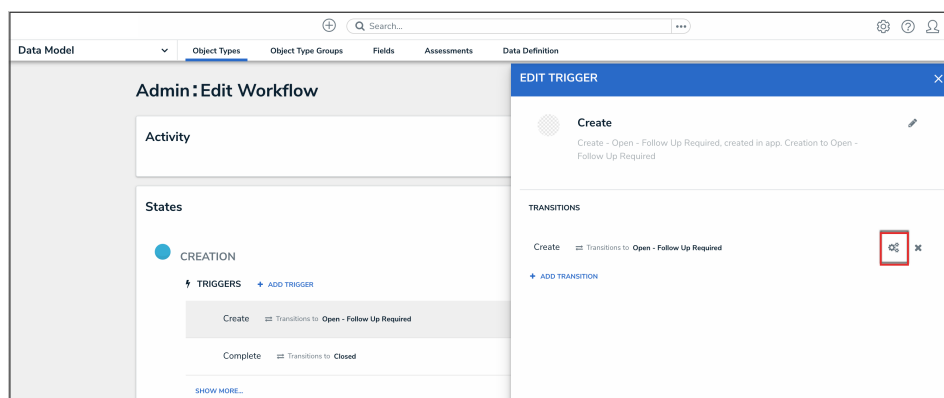
Add a Clear Roles Action to a Transition

1. From the **Edit Workflow** screen, click the trigger that you want to add the **Clear Roles** action to.



Workflow Trigger

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



Configure Icon

3. Click the **Add Action** button under **Actions**.

The screenshot shows the 'Admin:Edit Workflow' interface. On the left, there's a sidebar with 'Activity' and 'States'. The 'States' section shows 'CREATION' and 'OPEN - FOLLOW UP REQUIRED'. The 'EDIT TRIGGER' modal is open on the right. It has a 'Name' field with the value 'Create', a 'Destination State' dropdown set to 'Open - Follow Up Required', a 'Bypass Required Fields' checkbox, and sections for 'CONDITIONS' and 'ACTIONS'. The 'ACTIONS' section has a '+ ADD ACTION' button highlighted with a red box.

Add Action Button

4. Select **Clear Roles** from the **Type** dropdown menu.

The screenshot shows the 'Admin:Edit Workflow' interface. The 'EDIT TRIGGER' modal is open. The 'Type' dropdown menu is open, showing a list of options: 'Messaging', 'Role Management', 'Send Orchestration Event', 'Clear Fields', and 'Clear Roles'. The 'Clear Roles' option is highlighted with a red box.

Type Dropdown

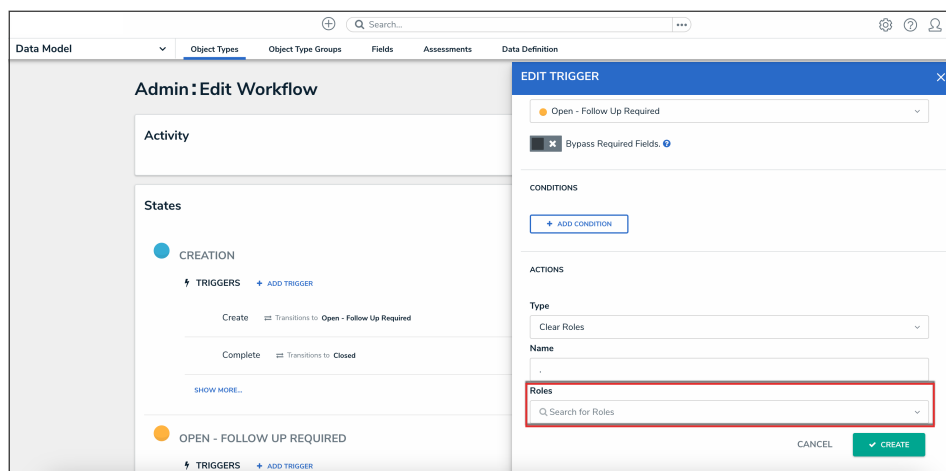
5. Enter a name for the action in the **Name** field.

The screenshot shows the 'Admin:Edit Workflow' interface. The 'EDIT TRIGGER' modal is open. The 'Type' dropdown menu is set to 'Clear Roles'. The 'Name' field is highlighted with a red box.

Name Field

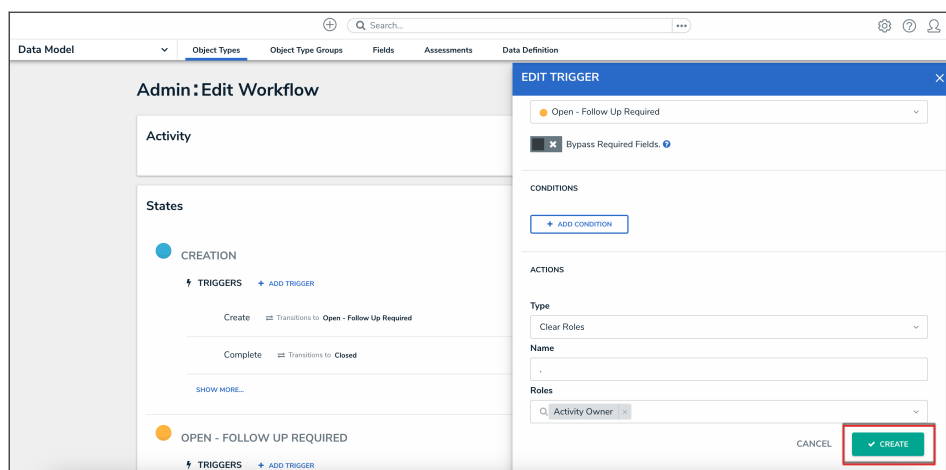
6. Select the roles you wish to clear data from (once the object transitions) from the

Roles dropdown menu.



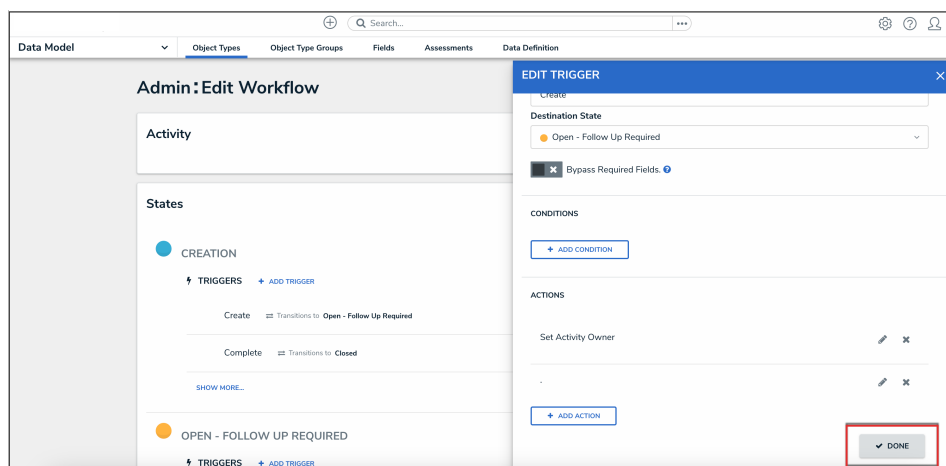
Roles Dropdown

7. Click the **Create** button.



Create Button

8. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.



Done Button

