Edit a User as an Advanced Permissions User

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Overview

From the ***Edit User*** screen, a **User Management** or **Settings Management** advanced permission user can edit a user's information and add the user to user groups and roles.

Note:
If you are an Administrator editing a user, please refer to the Edit a User article.

User Account Requirements

The user account you use to log into Resolver must have Administrator or the **User Management** or **Settings Management** advanced permissions to edit users. If you are an Administrator, please refer to the Edit a User article.

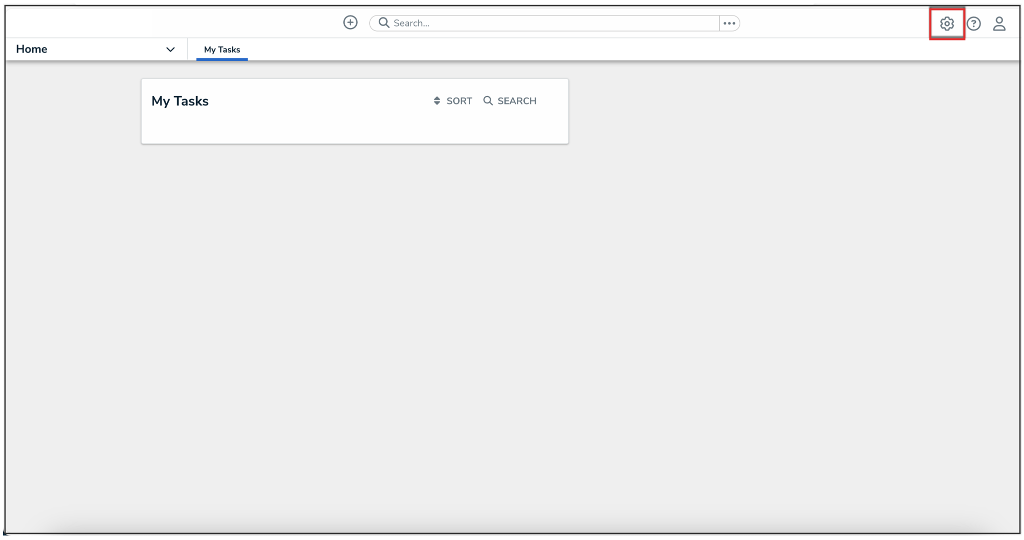
Related Information/Setup

Please see the Languages Overview article for more information on using an alternate language setting.

Please see the Access Your Data Warehouse Settings article for Orgs that have Data Warehouse enabled.

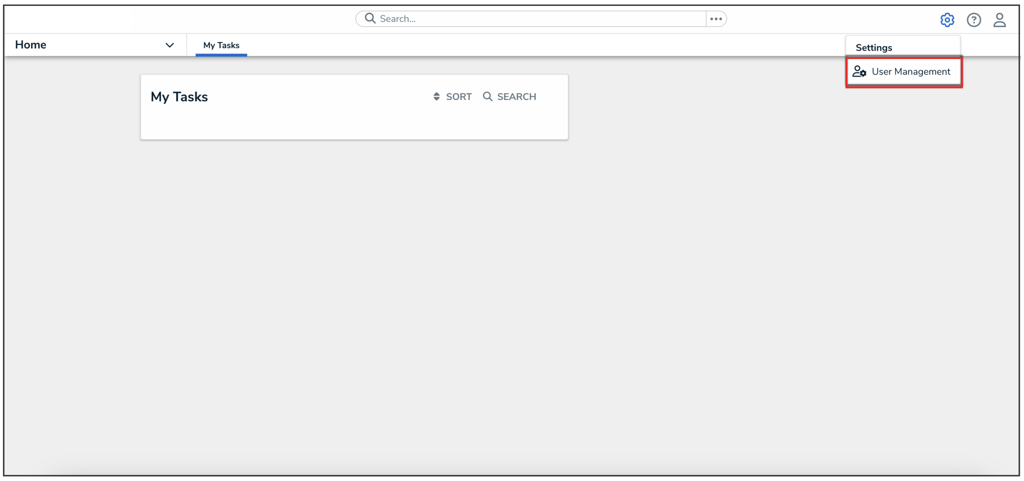
Navigation

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



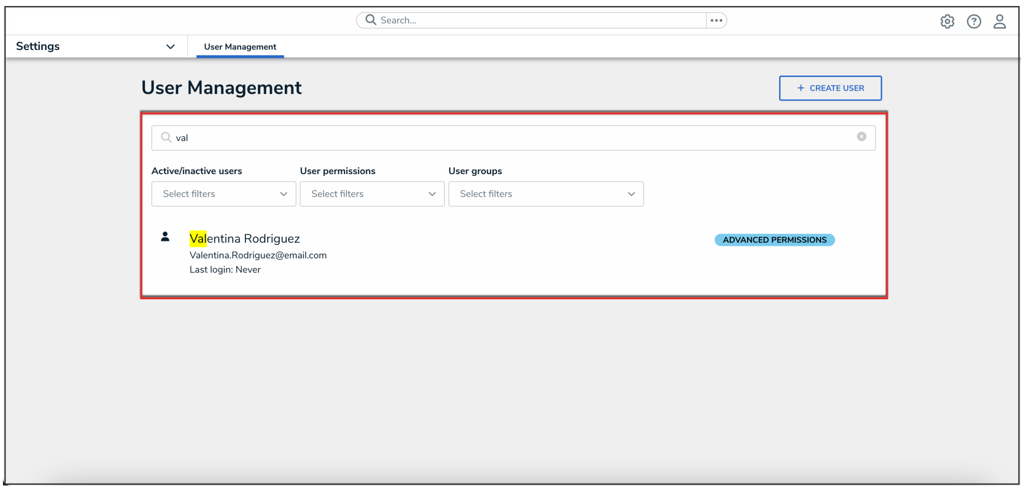
Administration Icon

2. From the **Administrator Settings** menu, click **User Management.**



Administrator Settings Menu

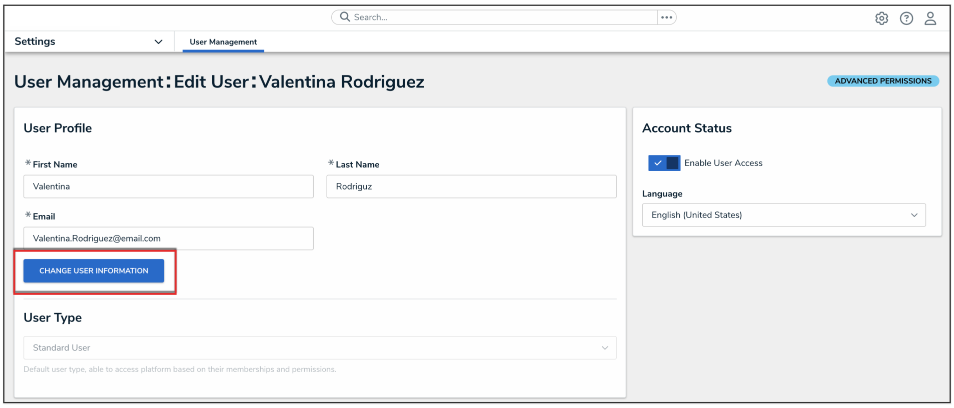
3. Enter a user's name in the **Search** field to narrow the search results.
4. Click the name of the user you want to edit.



Editing a User

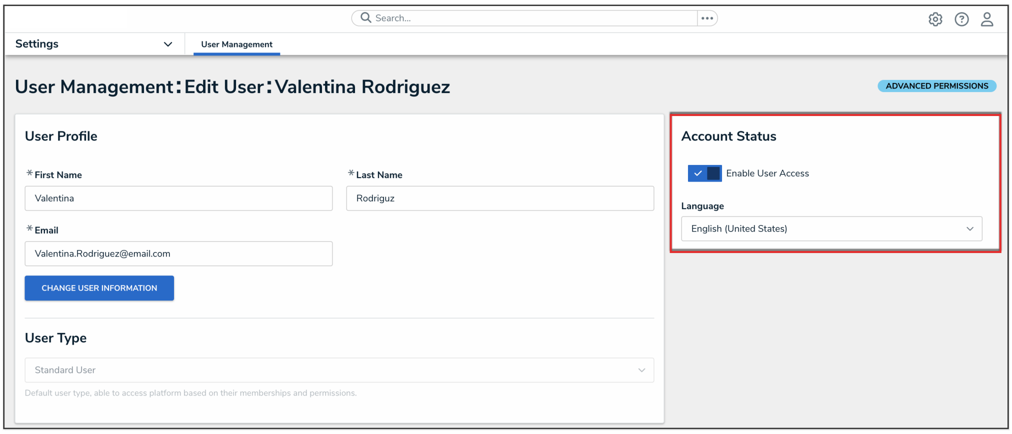
> **Note:**
> The ***Edit User*** screen may look different if SSO or MFA is enabled on your Org.

1. From the ***Edit User*** screen, you can edit the following fields under the **User Profile** section:
   - **First Name:** Click the **First Name** field to change to the user's first name.
   - **Last Name:** Click the **Last Name** field to change to the user's last name.
   - **Email Address:** Click the **Email Address** field to change to the user's email address.
     - The following are different situation that can occur when change a user's email address:
       - If the Administrator who changes the email address is a member of all the same Orgs as the user. The email address change will take effect immediately.
       - If the Administrator who changes the email address is not a member of all the same Orgs as the user. The user is moved to a Pending state and must click a **Verification** link for the changes to take effect. The Administrator can also **Resend Email Confirmation** or **Cancel Changes**.
       - If the user is logged in to the system. The user will see a system notification at the top of their screen, indicating Email Updated.
       - If the user is not logged in to the system. The user will be redirected the next time they log in. The user must log in on the redirected screen using their original email address. On successful login, the user will see an Email Updated confirmation message.
2. Once you make a edit to one of these fields, click the **Change User Information** button to save the changes.



Change User Information Button

3. In the **Account Status** section, select the **Enable User Access** toggle switch to enable (blue) or disable (grey) a user profile.

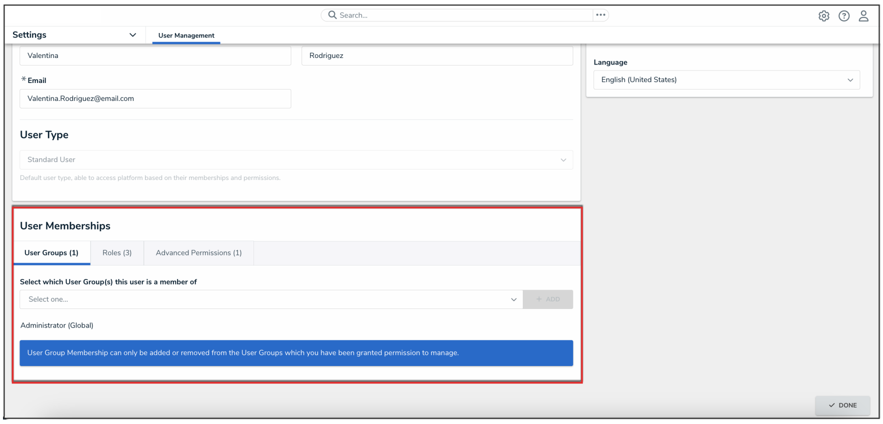


Enable User Access Toggle Switch

4. Select a **Language** preference from the drop-down menu to change the system's language setting. Before you can set an alternate language setting, an Administrator needs to download a language CSV file from the system, map language translations to the user interface text, and upload the CSV file for use within Resolver.

> ***Note:***
> The default language setting in the user's browser will take precedence over Resolver for language translations.

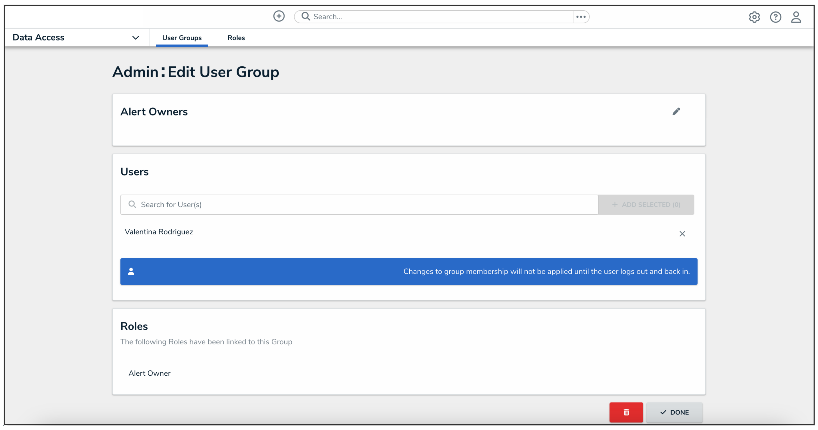
5. In the **User Memberships** card, users will have a different view depending on which user type was selected in Step 2. Each tab in this section includes a count of how many of the designated memberships the user has.
   - For all user types, the **User Groups** tab shows the user groups the user is enrolled in. To add a user to a user group, select the user group from the **Select which User Groups(s) this user is a member of** drop-down and click the **Add** button.



User Groups Tab

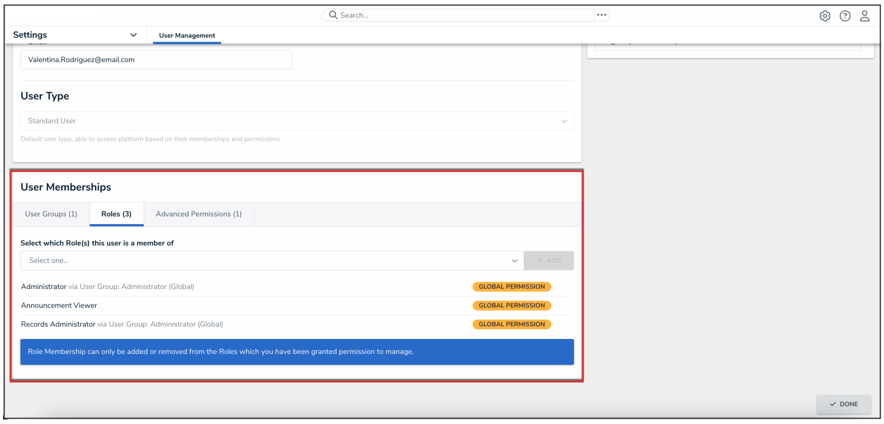
> ***Best Practice:***
> We recommend adding users to a user group via the **User Memberships** section to more accurately manage permissions for all the users in the same group.

- Click a **User Group** to open the ***Admin: Edit User Group*** screen to view further details, remove, and add a user to the user group.



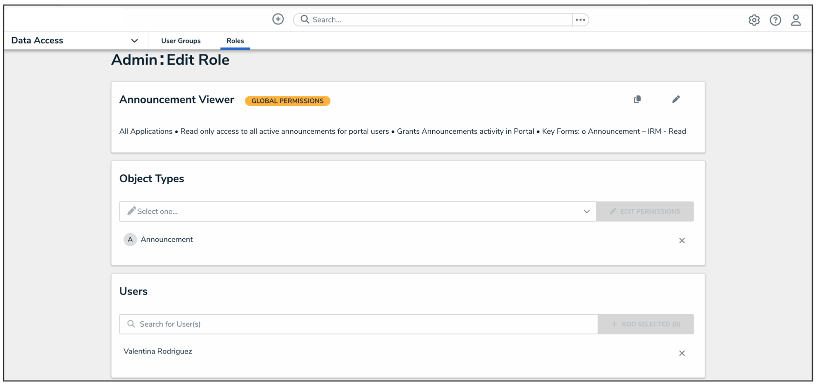
Edit User Groups Screen

- For all user types, the **Roles** tab shows the roles the user is enrolled in. To add a user to an individual role, select the role from the **Select which Role(s) this user is a member of** drop-down and click the **Add** button.



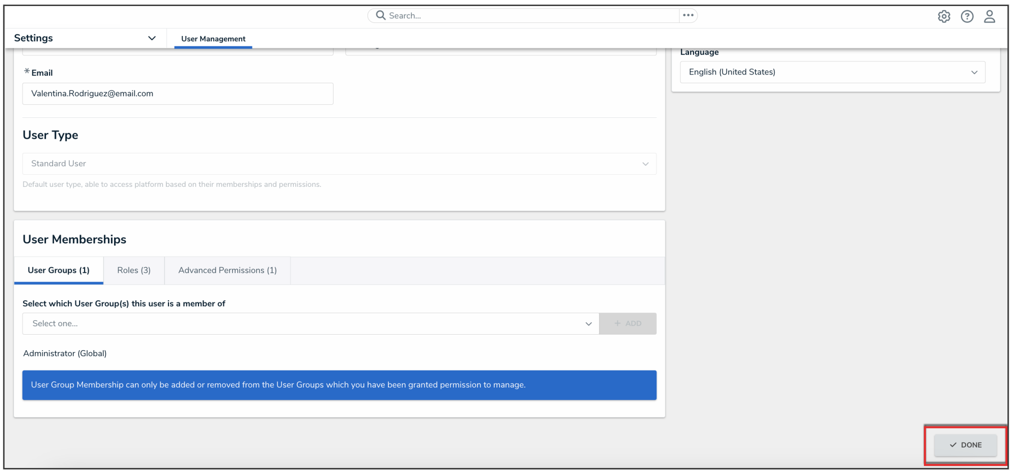
Roles Tab

- Click a **Role** to open the ***Admin: Edit Role*** screen to view further details, remove, and add a user to a role.



Edit Role Screen

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



Done Button