

Edit a User

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Overview

From the *Edit User* screen, an Administrator can edit a user's information, set the user account status and advanced permissions, and add the user to user groups and roles.

Note: If you are a **User Management** or **Settings Management** advanced permissions creating a new user, please refer to the Edit a User as an Advanced Permissions 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 advanced permissions user, please refer to the Edit a User as an Advanced Permissions 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.

Please see the Assigning Advanced Permissions to a User article for adding advanced permissions to a user.

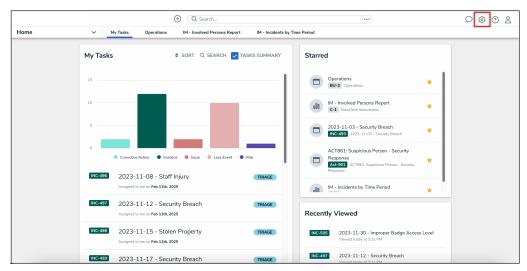
Please see the Managing Portal URL Membership article for more information on managing Portal URL membership for Portal URL Access users.

Please see the Resetting Multi-Factor Authentication and Opt-Out Multi-Factor Authentication for a Specific User articles for more information on opting out of and resetting MFA for an individual user.

Navigation

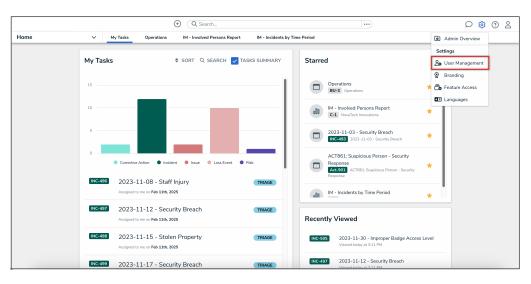
1. From the *Home* screen, click the Administration icon.





Administration Icon

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



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.



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Settings ~	User Management Branding Languages		
	User Management	★ EXPORT AS CSV + CREATE USER	
	Q Val	0	
	100 Licensed Users 11 Enabled 0 Inactive Active/inactive users Select filters	User permissions User groups Select filters V	
	 Valentina Rodriguez Valentina Rodriguez@email.com Last login: Never 	IMPERSONATE	

User Name

Editing a User

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

- From the *Edit User* screen, an Administrator 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 an edit to one of these fields, click the **Change User Information** button to save the changes.

	④ Q Search		•••	\$ 0 £
Settings V User Management Branding	Languages			
User Profile			Account Status	
* First Name	* Last Name		Enable User Access All Data Acce	155
Valentina	Rodriguz		Enforce Org-Level MFA 🔮	
* Email			RESET ORG-LEVEL MFA FOR THIS USER	
Valentina.Rodriguez@email.com			Language	
CHANGE USER INFORMATION			English (United States)	~
User Type Administrator Provides system administrative rights, able to access the Admin Overview and Settings tad	S.	~		
User Memberships				
User Groups (1) Roles (3)				
Select which User Group(s) this user is a member of				
Select one		✓ + ADD		
Administrator (Global)		×		

User Profile Section

- 3. From the **User Type** drop-down menu, an Administrator can change a user's user type to one of the following options. Please refer to the **Changing the User Type** section of this article for a full list of how a user's access will change if the user type is changed.
 - **Standard User**: The default user type, standard users are granted access to parts of Resolver based on their memberships and permissions.
 - Administrator: This user type provides system administrative rights, and the ability to access the *Admin Overview* page and the Administrator Settings menu.
 - **Portal URL User**: This user type enables users to be assigned to Portal URLs, and the ability to authenticate access to assigned Portals.

Note:

The options displayed in the **Account Status** section and **User Memberships** cards will change based on the user type selected.

- An Administrator can edit the following toggle switches and fields under the Account Status section:
 - Enable User Access: Select the Enable User Access toggle switch to enable (blue) or disable (grey) a user profile.
 - All Data Access: Select the All Data Access toggle switch to enable (blue) or disable (grey) all access, granting the user access to view, edit and delete all



objects within an organization.

Warning: Resolver recommends not enabling the All Access toggle switch for new user accounts.

- For Orgs that have multi-factor authentication (MFA) enforced:
 - An Enforce Org Level MFA toggle switch will be visible which allows Administrators to opt that user out of MFA for that Org. Please see the Opt-Out Multi-Factor Authentication for a Specific User article for more information.
 - The Reset MFA For This User button allows an Administrator to reset multifactor authentication (MFA) for the end user. Please see the Resetting Multi-Factor Authentication article for more information.
- Language: Select a Language preference from the dropdown 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.

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Settings v User Management Branding	Languages			
User Profile			Account Status	
* First Name	* Last Name		Enable User Access	CCESS
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* Email			Enforce Org-Level MFA 😨	
Valentina.Rodriguez@email.com			Language	
CHANGE USER INFORMATION			English (United States)	~
User Type				
Administrator		~		
Provides system administrative rights, able to access the Admin Overview and Settings to	sis.			
User Memberships				
User Groups (1) Roles (3)				
Select which User Group(s) this user is a member of				
Select one		✓ + ADD		
Administrator (Global)		×		

Account Status Section

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.

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Settings v User Management Branding	Languages		
User Profile		Account Status	
* First Name	*Last Name	Enable User Access All Data Acce	:55
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* Email		Enforce Org-Level MFA O	
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER	
		Language	
User Type		English (United States)	~
Administrator			
Administrator	×		
Administrator Provides system administrative rights, able to access the Admin Overview and Settings ta			
Provides system administrative rights, able to access the Admin Overview and Settings ta			
Provides system administrative rights, able to access the Admin Derview and Settings to User Memberships			
Provides system administrative rights, able to access the Admin Overview and Settings ta			
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Provides system administrative rights, able to access the Admin Overview and Settings to User Memberships User Groups (1) Roles (3)			
Provides system administrative rights, able to access the Admin Diverview and Settings to User Memberships User Groups (1) Roles (3) Select which User Group(1) bits user is a member of	ada.		

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.

	€ Q Search)	\$ 0 \$
Data Access	V User Groups Roles		
	Admin:Edit User Group		
	Alert Owners	/	
	Users		
	Q, Search for User(s)	+ ADD SELECTED (0)	
	Valentina Rodriguez	×	
	±	Changes to group membership will not be applied until the user logs out and back in.	
	Roles The following Roles have been linked to this Group		
	Alert Owner		

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.



	⊕ (Q. Search	
Settings V User Management Branding L	anguages	
User Profile		Account Status
* First Name	* Last Name	Enable User Access All Data Access
Valentina	Rodriguez	
* Email		Enforce Org-Level MFA 💿
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER
		Language English (United States)
User Type		English (United States) ~
Administrator	~	
Provides system administrative rights, able to access the Admin Overview and Settings tasks.		
User Memberships		
User Groups (1) Roles (3)		
Select which Role(s) this user is a member of		
Select one	✓ + ADD	
Administrator via User Group: Administrator (Global)	GLOBAL PERMISSION	
Announcement Viewer	GLOBAL PERMISSION X	

Roles Tab

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

✓ User Groups Roles	
Admin: Edit Role	
Announcement Viewer GLOBAL PERMISSIONS	
All Applications • Read only access to all active announcements for portal users • Grants Announcements activity in Portal • Key Forms: o Announcement - IRM - Read	
Object Types	
Select one v ZEDIT PERMISSIONS	
Announcement X	
Users	
Q, Search for User(s) + ADD SELECTED (5)	
Valentina Rodriguez X	
	All Applications + Read only access to all active announcements for portal uses + Grants Announcements activity in Partial + Key Forms + Announcement - IRM + Read Object Types Image: Comparison of the Compa

Edit Role Screen

- For Portal URL Access users: The **Portal URLs** tab shows which Portal URL a Portal URL Access user is assigned to. Please see the Managing Portal URL Membership article for more information.
- *For Standard users:* Administrators can grant the following advanced permissions to standard users:
 - 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

Please see the Assigning Advanced Permissions to a User article for more information.

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



	(Q Search	···
Settings V User Management Branding	Languages	
User Profile		Account Status
* First Name	* Last Name	Enable User Access
Valentina	Rodriguez	
* Email		Enforce Org-Level MFA 9
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER
		Language
User Type		English (United States) ~
Administrator	~	
Provides system administrative rights, able to access the Admin Overview and Settings tasks	L	
User Memberships		
User Groups (1) Roles (3)		
Select which User Group(s) this user is a member of		
Select one	✓ + ADD	
Administrator (Global)	×	

Done Button

Changing the User Type

Please refer to the following table to see how access will change if an Administrator changes a user's user type:

Original User Type	New User Type	Access Change
Standard User	Administrator	 Advanced permissions are removed User groups and roles that Settings Management advanced permission and User Management advanced permission users have permission to manage are removed User groups and roles the User Impersonation
		advanced permission users have permission to impersonate are removed





Original User Type	New User Type	Access Change
Portal URL User	Administrator	 This user type can be changed only if no Portal URL memberships are assigned to the user
Portal URL User	Standard User	 This user type can be changed only if no Portal URL memberships are assigned to the user