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.
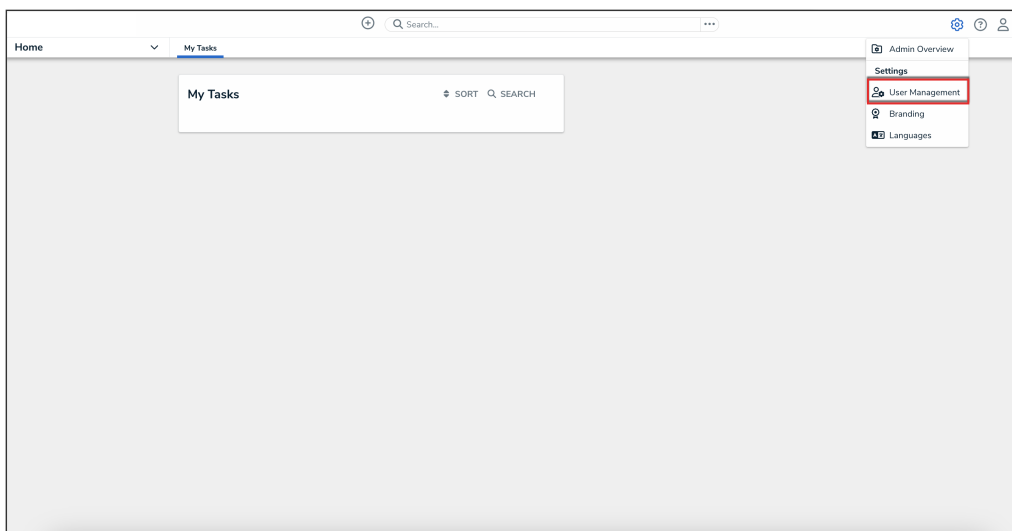
Navigation

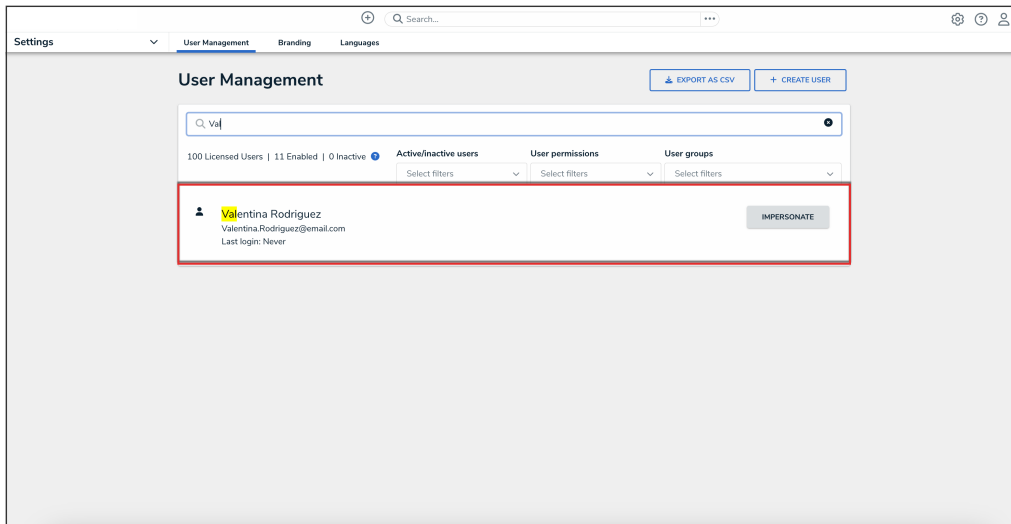1. From the ***Home*** screen, click the **Administration** icon.
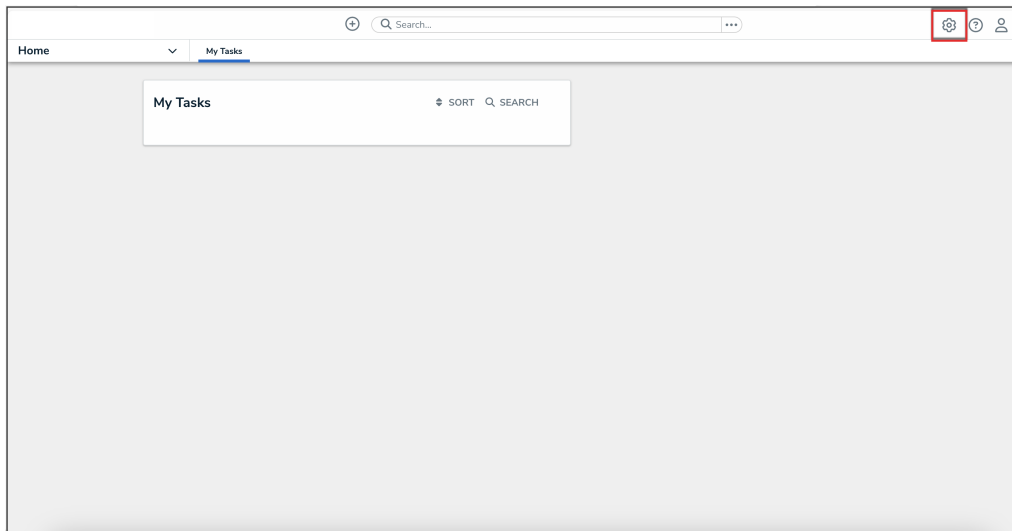
Administration Icon

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

User Name

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, 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.
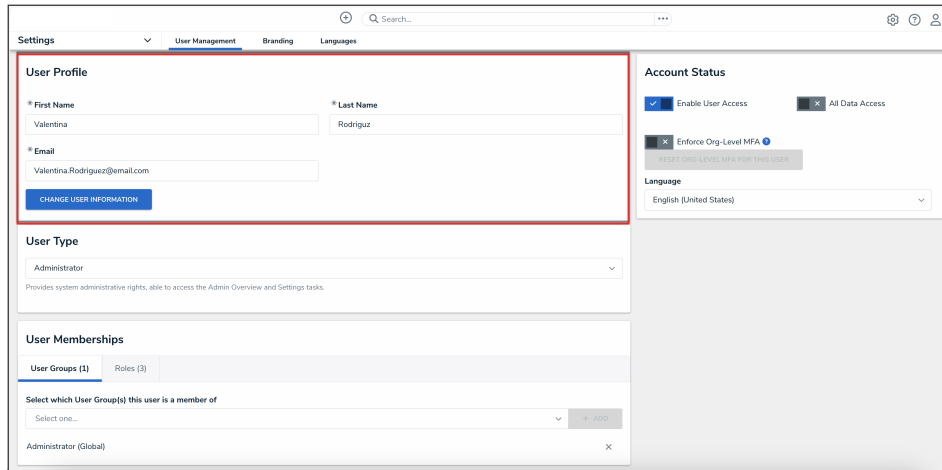
User Profile Section

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.

4. 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 multi-factor 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.

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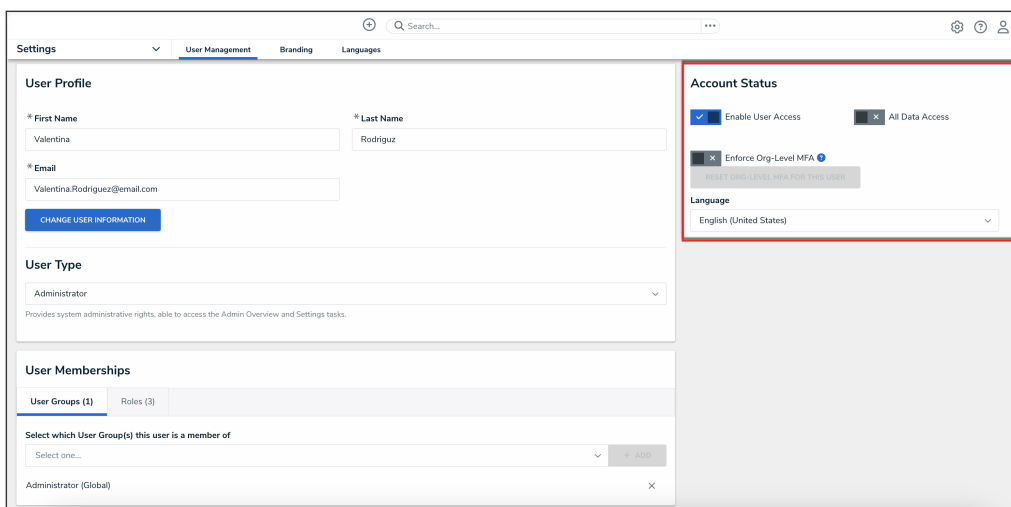

Account Status Section

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.
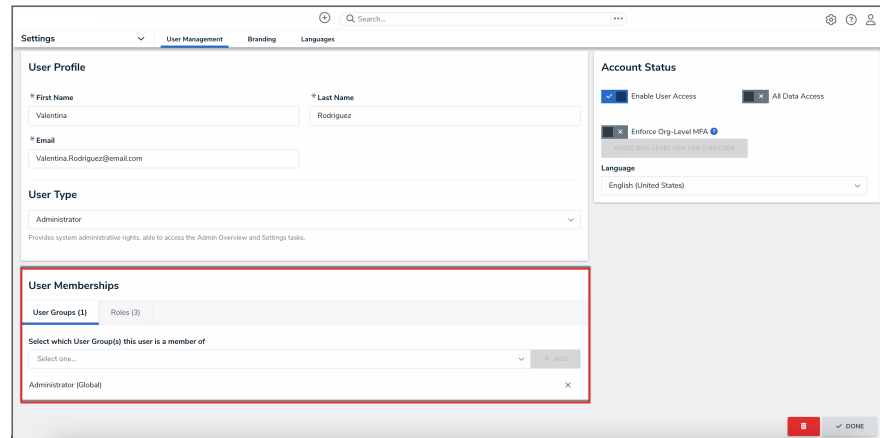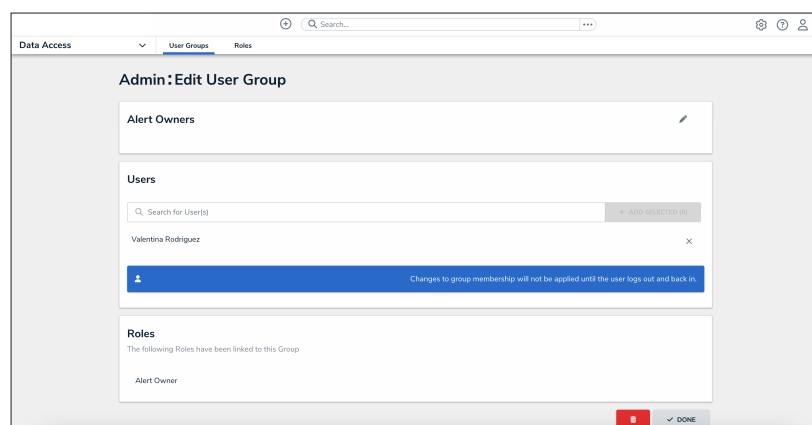


User Groups Tab

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.
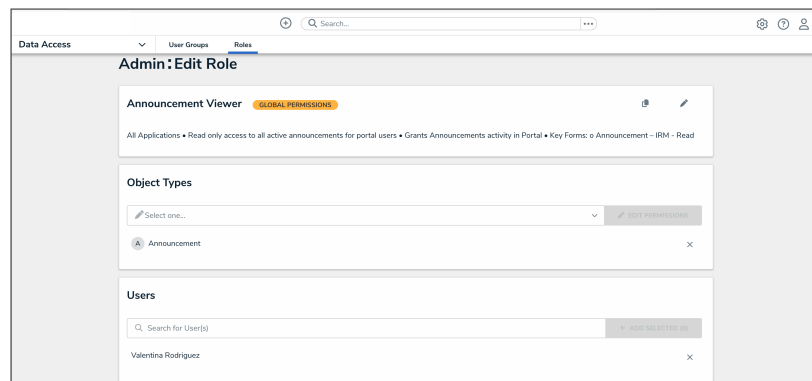

Edit User Groups Screen

- 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.
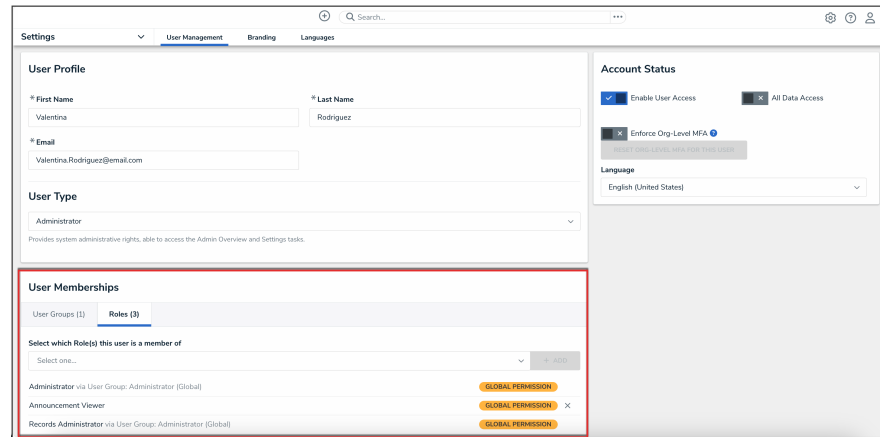
Roles Tab

- 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

- *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 Management:** Manage reports and dashboards
  - **Settings Management:** Manage all tasks under the Administrator Settings menu
  - **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.
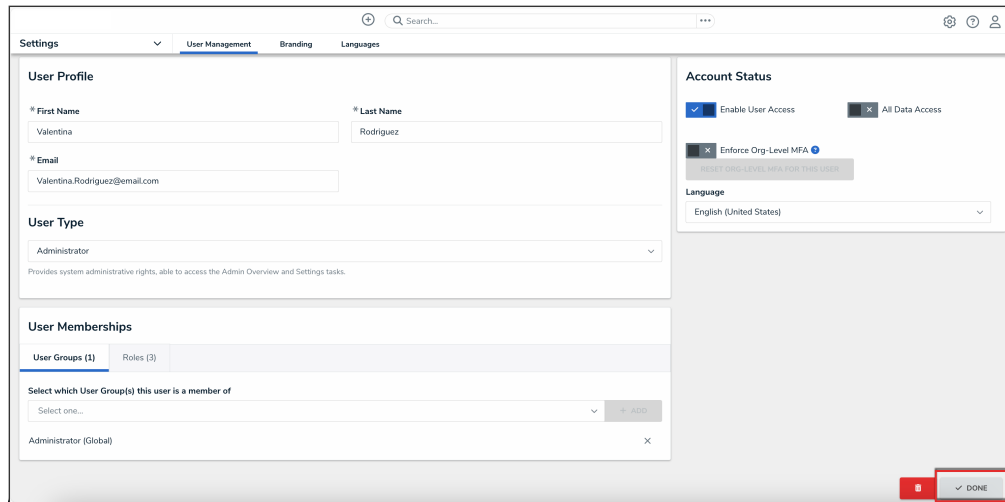
Done Button

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

Original User Type	New User Type	Access Change
Standard User	Portal URL User	- All data access is removed - SSO access is hidden from the ***User Management*** screen **Enforce Org level MFA** access is removed - 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
Administrator	Portal URL User	- Access to Administrator activities and functions are removed - All data access is removed - SSO access is hidden from the ***User Management*** screen **Enforce Org level MFA** access is removed
Administrator	Standard User	Access to Administrator activities and functions is removed
Portal URL User	Administrator	This user type can be changed only if no Portal URL memberships are assigned to the user

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