

Edit a User

Last Modified on 11/12/2024 4:24 pm EST

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.

User Account Requirements

The user account you use to log into Resolver must have Administrator or advanced permissions to edit users.

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.

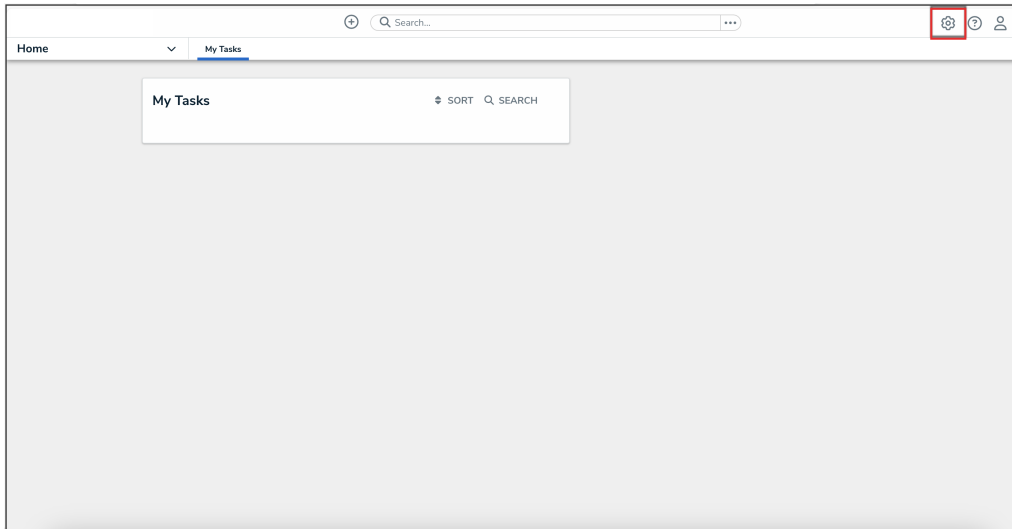
Please see the [Assigning Advanced Permissions to a User](#) article for adding advanced permissions to a user.

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.

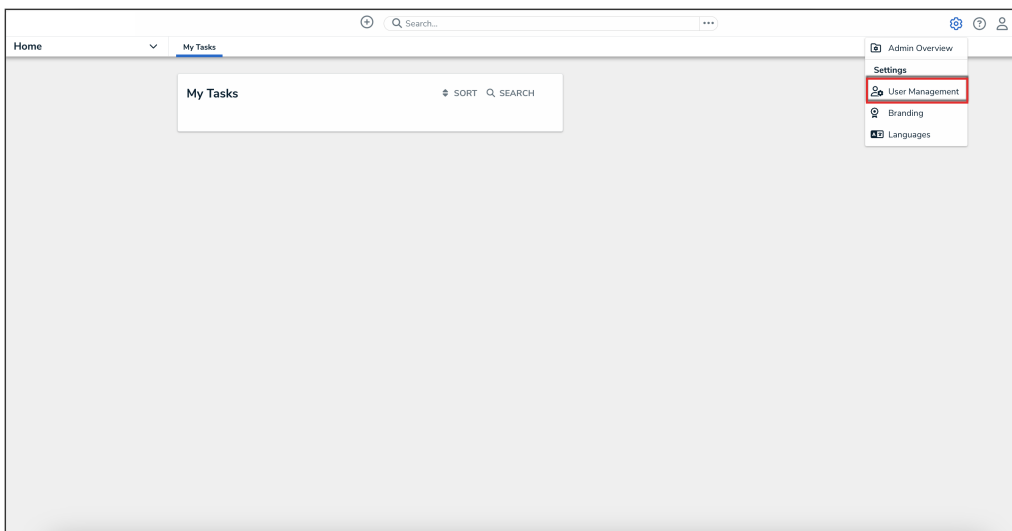
Navigation

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



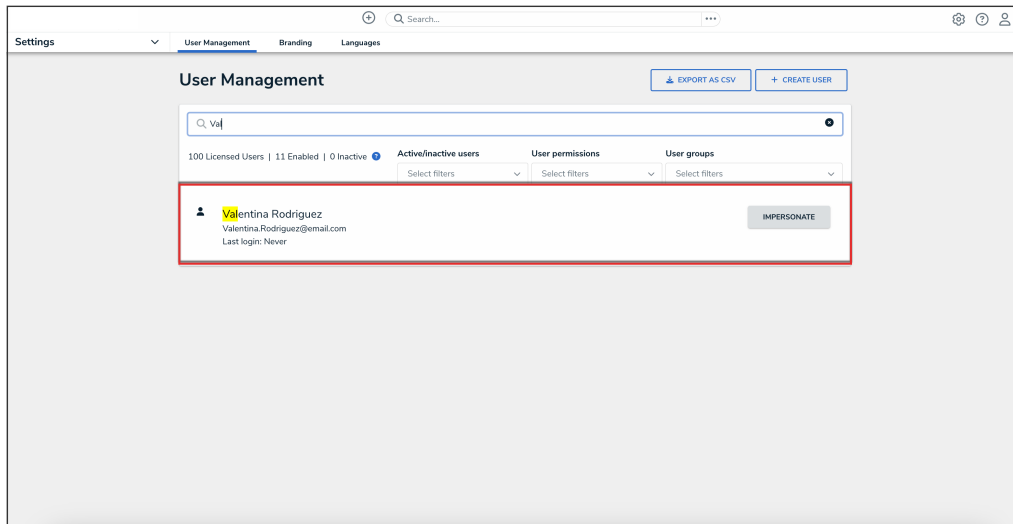
Administration Icon

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



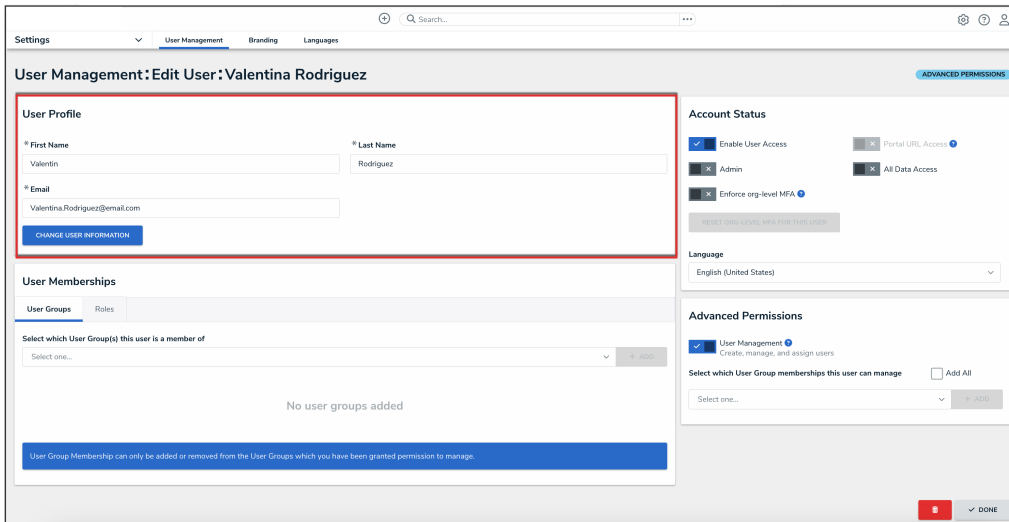
Note:

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. In the **User Profile** section, an Administrator can edit the user's **First Name**, **Last Name**, or **Email Address** fields. Once you make a edit to one of these fields, click the **Change User Information** button to save the changes.



User Profile Section

3. 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.
- **Portal URL Access:** Click the **Portal URL Access** toggle switch to grant the user account access only to the Portal URL.



Note:

When you click the **Portal URL Access** toggle switch, the **Admin**, **All Data Access**, **Enforce Org Level MFA**, and **Advanced Permission** toggle switches will automatically be disabled.

- **Admin:** Select the **Admin** toggle switch to enable (blue) or disable (grey) Administration permissions.
- **All Data Access:** Select the **All Data Access** toggle switch to enable (blue) or disable (grey) all access, granting the user access to all object types and objects within an organization.
- *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

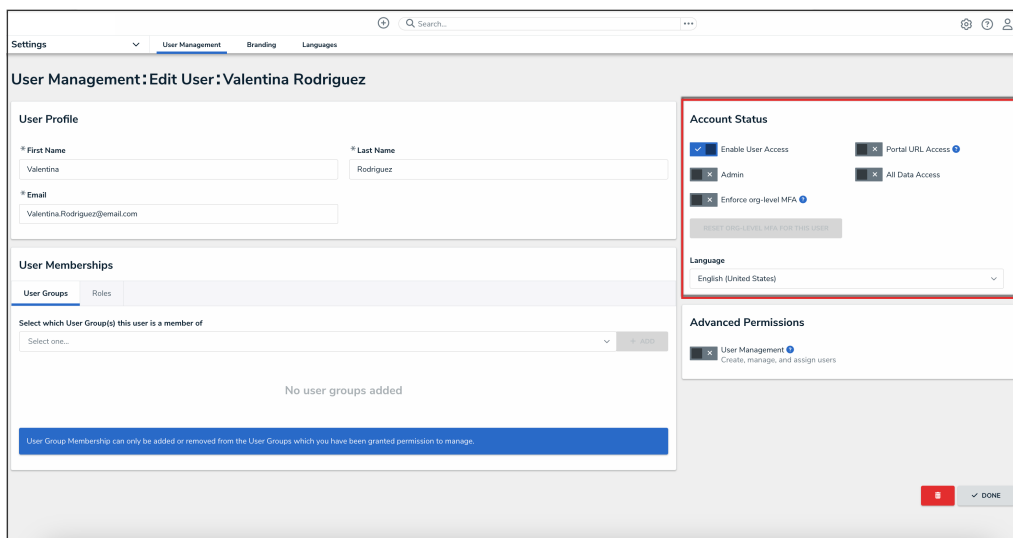
out of MFA for that Org. Please see the [Opt-Out Multi-Factor Authentication for a Specific User](#) article for more information.

- **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.



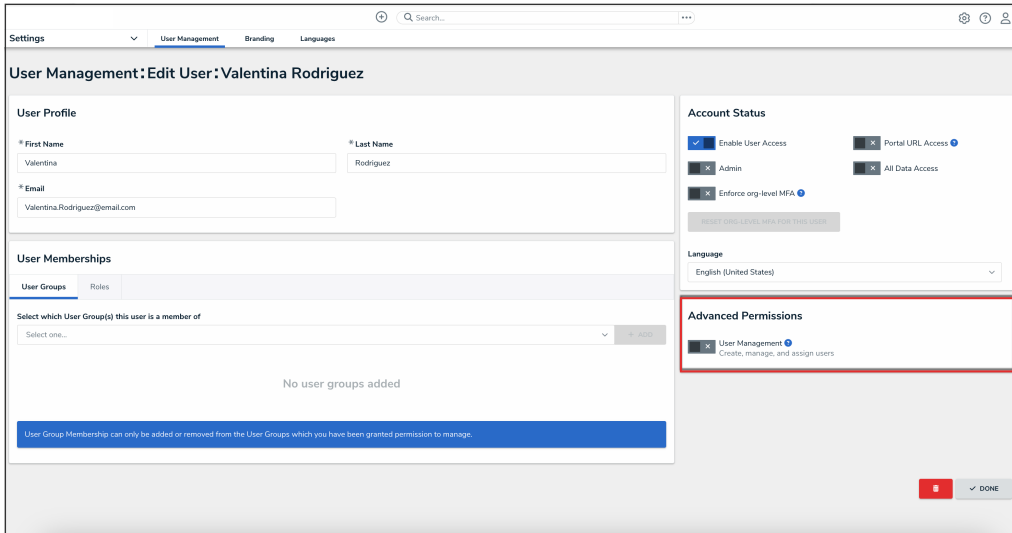
Note:

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



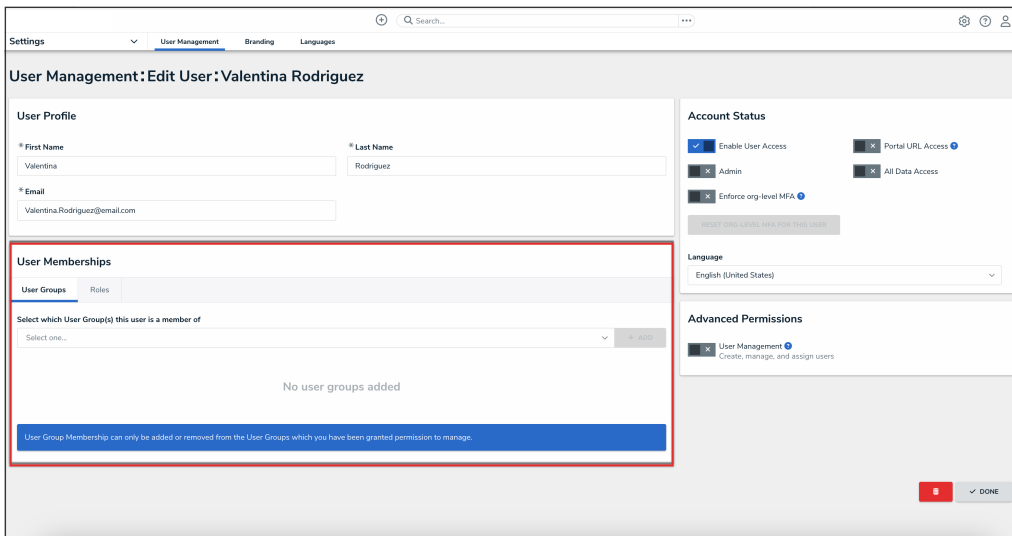
Account Status Section

4. Click the **User Management** toggle switch under the **Advanced Permissions** section to grant the user advanced permissions. Please see the [Assigning Advanced Permissions to a User](#) article for adding advanced permissions to a user.



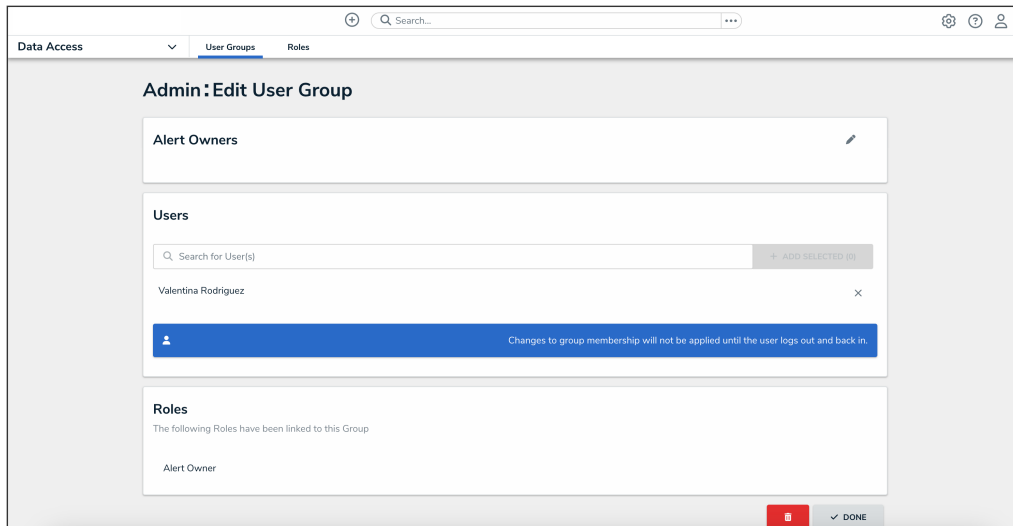
User Management Toggle Switch

5. For Portal URL Access users: In the **User Group Membership** section, 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.
6. In the **User Group Membership** section, 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** dropdown and click the **Add** button.



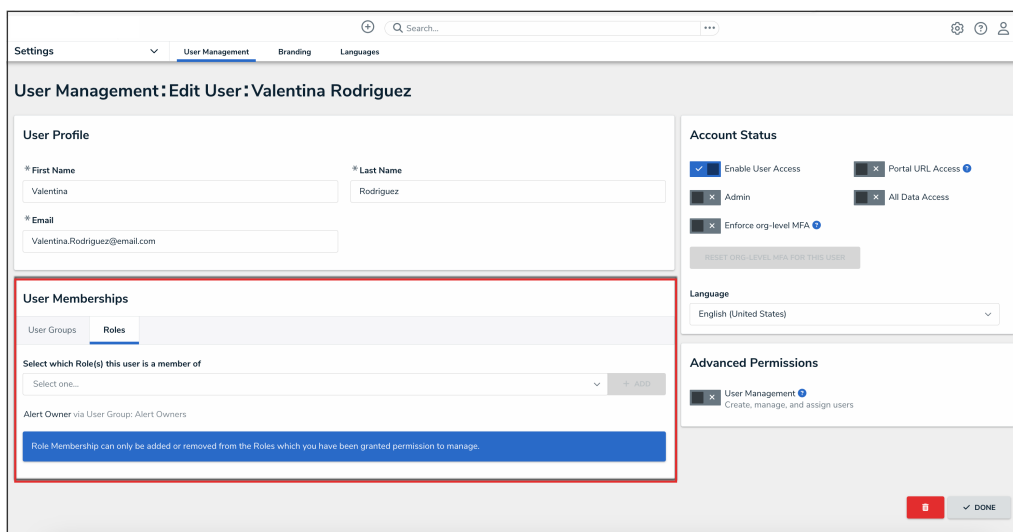
User Groups Tab

7. 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

- In the **User Group Membership** section, 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** dropdown and click the **Add** button.



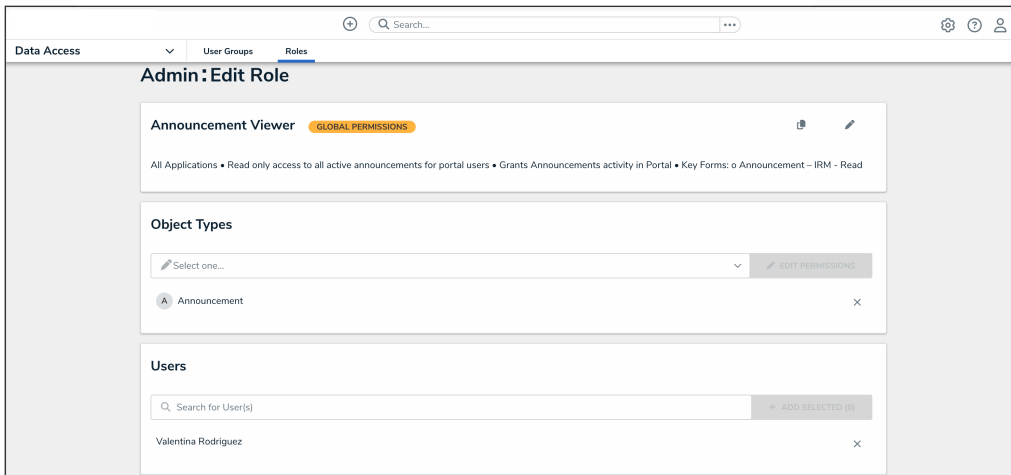
Roles Tab



Best Practice:

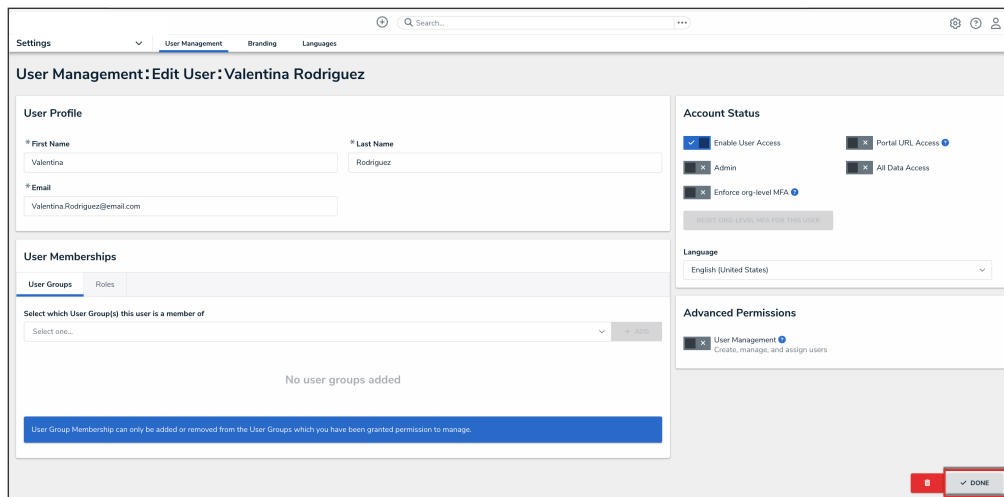
We recommend adding users to a user group via the **User Memberships** section to more accurately manage permissions for all the users in the same group.

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



Edit Role Screen

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



Done Button