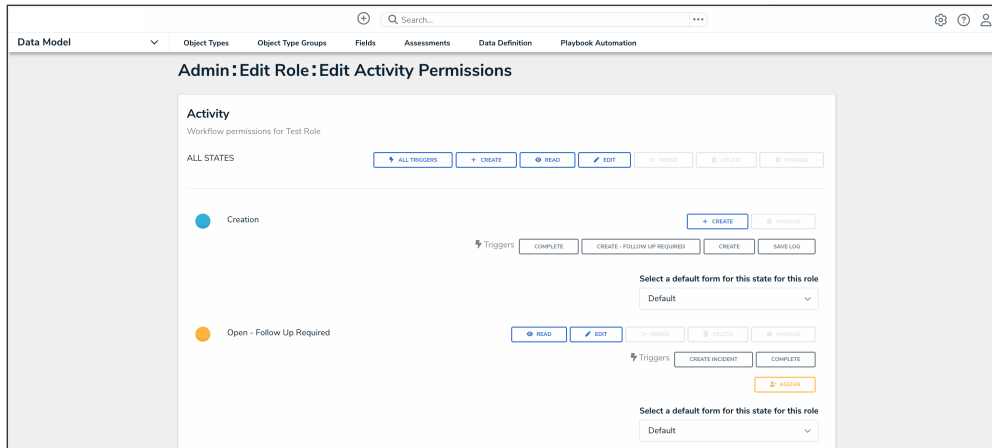


Workflow Permissions

Last Modified on 11/19/2024 1:54 pm EST

Overview

Every object type added to a role requires workflow permissions, allowing you to create a layer of security on an object for global and explicit permissions. Through these configurations, you can control the data a user can see and the actions a user can perform.



Workflow Permissions

Related Information/Setup

Please see the [Workflows](#) section for more information on workflows.

Please refer to the [Merge Rules Overview](#) article for further information on the merge duplicate object feature rules.

Please refer to the [Enabling Merge Object Permissions on an Object Type](#) article for further information on enabling the merge duplicate object feature.

Workflow Permissions

Except for the **All States** permission, the following permissions can be applied to each state added to an object type:

- **All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these rights for all states in the workflow. When **All Triggers** is selected, users can view and click all triggers on a form to transition an object to its next state. The triggers visible to the user depend on whether the object is in the state associated with the trigger.
- **Create:** Users can create a new object. This permission applies only to the Creation state of the object type. When granting a user this permission, you must enable one or more

triggers for this state.

- **Read:** Users can view the object when it's in the selected state. You cannot select **Edit**, **Delete**, or **Manage** permissions unless **Read** has been selected.
- **Edit:** Users can edit existing objects in the selected state. The edit state also enables the Merge Duplicate Objects feature.
- **Delete:** Users can delete existing objects in the selected state.
- **Manage:** Users can add other users with explicit permissions on the object type to a role field on a configurable form to give them access to the object while it's in the selected state. The **Manage** permission only works if the user has **Edit** permission on the object.



Note:

Users added to the **Role** field on the form will not see the object until it's in a state they have permission to view. **Manage** applies to explicit permissions only.

- **Triggers:** Users can see and click the selected trigger on a form to transition an object to its next workflow state. The trigger will be visible only when the object is in the state associated with the trigger.
- **Assign:** Once the object is in the selected state, users granted permission to view it through a role will see it in their task list on the [My Tasks](#) page.
- **Select a default form this state for this role :** The form users will see when using the [Search](#) feature, [Quick Add](#) to create an object, viewing an [assessment table](#) on a form, or opening an object via the [relationship graph](#):
 - If you **do not** choose a form from this dropdown menu, the object type's default form will be displayed.
 - If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator elsewhere in Core.
 - If you select a configurable form from this dropdown menu, the selected form will be displayed.

The screenshot shows a user interface for an object in the 'Archived' state. At the top, there are buttons for 'READ', 'EDIT', 'DELETE', and 'MANAGE'. Below these is a 'Triggers' section with an 'ASSIGN' button. A red-bordered dropdown menu is open, displaying the text 'Select a default form for this state for this role' and a 'Default' option with a downward arrow. At the bottom of the dropdown are 'CANCEL' and 'DONE' buttons.

Select a Default Form For This State For This Role Dropdown



Note:

Forms selected in an [action](#), [view](#), [data visualization](#), or [relationship table](#) will override any selections made in the **Select a default form this state for this role** field.

Workflow permissions can be configured on new roles by adding an object type to a role, then clicking the **Edit Permissions** button. Open the **Edit Role** screen for existing roles, then click on a previously added object type to edit the permissions.