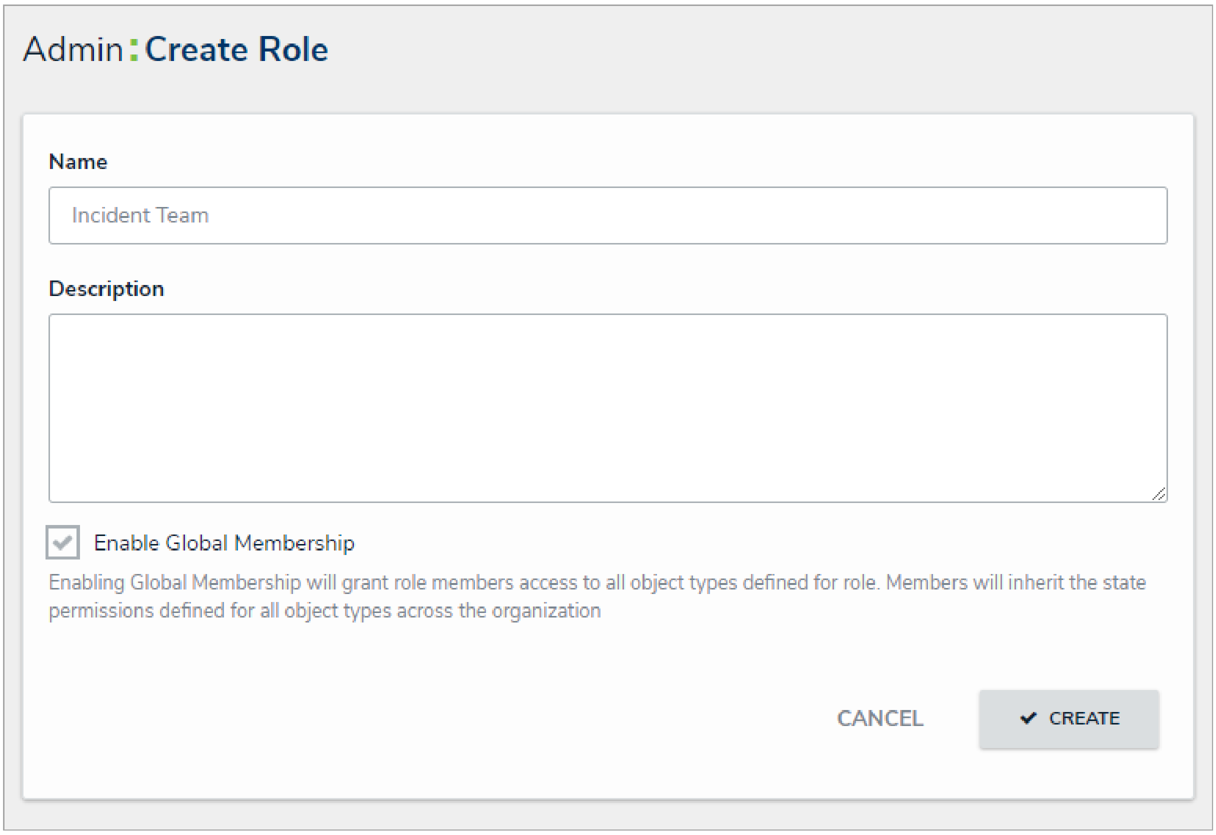
Create a New Role

If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence. If needed, you can review which roles an individual user has been added to from the **User Role Membership** section on the**Edit User** page.

To create a new role:

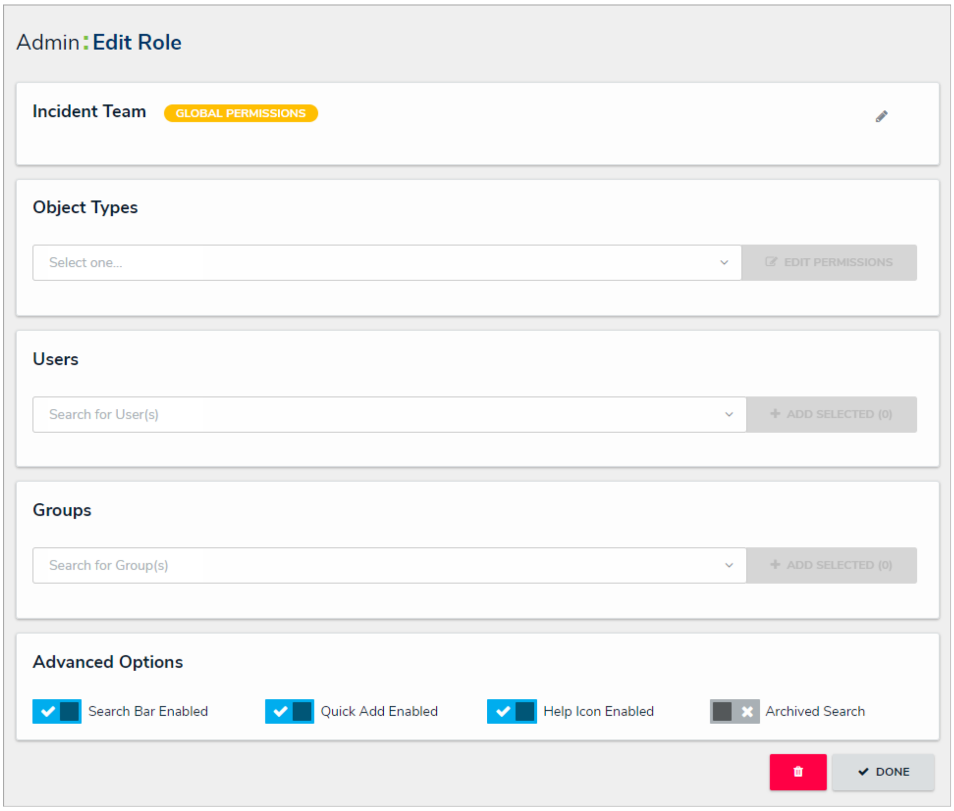
1. Click the icon in the top bar > **Roles** in the **People** section.
2. Click **Create Role** to display the **Create Role** page.
3. Enter the name for the role in the **Name** field.
4. **Optional:** Enter a description of the role in the **Description** field. This description will appear below the role's name when editing it.
5. **Optional:** Select the **Enable Global Membership** checkbox if you wish to grant this role global permissions.

   Once a role is created, you cannot enable or disable global membership (permissions) from the **Edit Roles** page. To enable or disable global permissions on an existing role, you must delete then recreate the role.



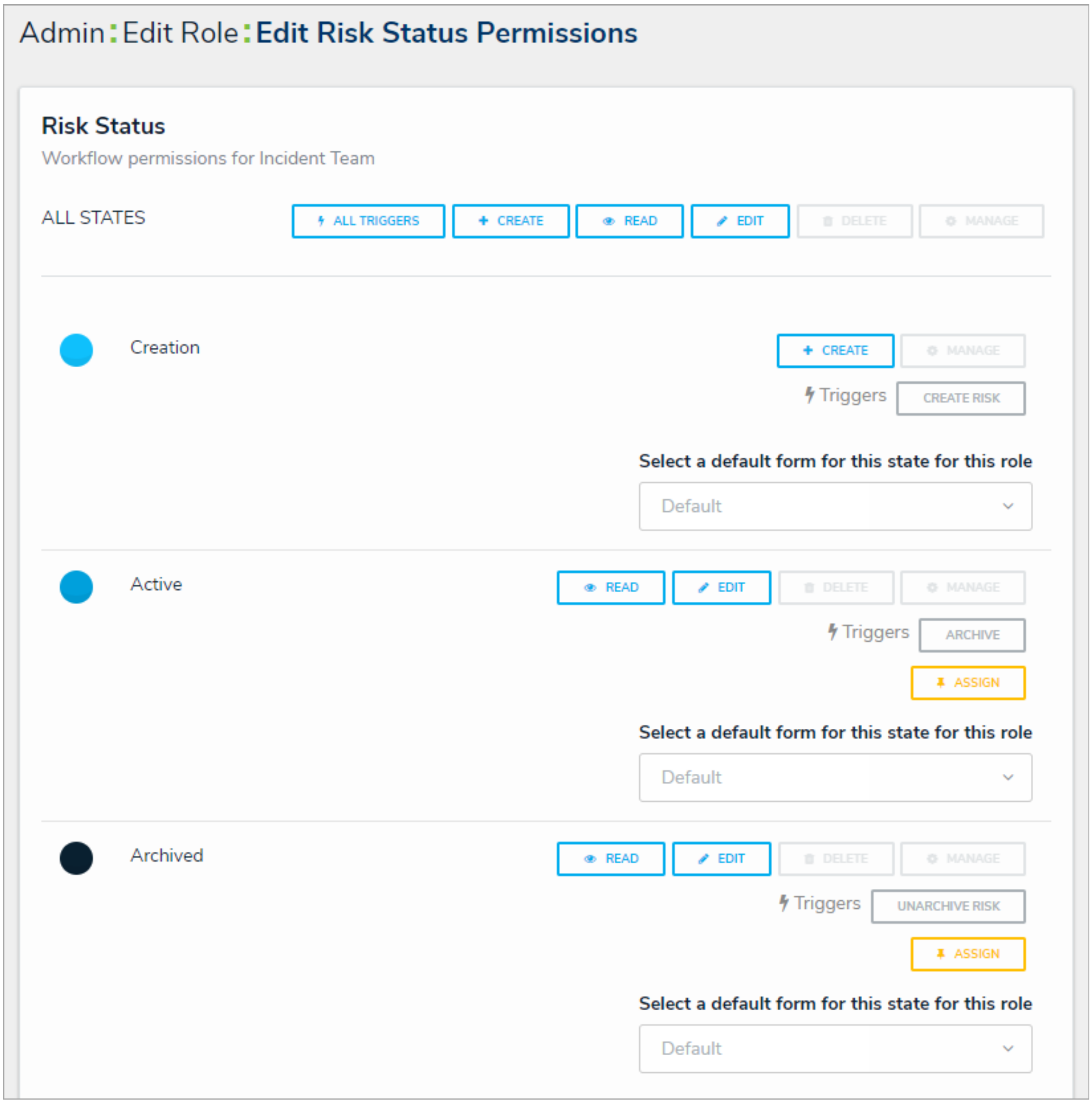
The Create Role page.

6. Click **Create** to show the **Edit Role** page.



The Edit Role page.

7. In the field under **Object Types**, type the name of the object type you want to add, then press **Enter** on your keyboard or select it from the dropdown menu.
8. Click **Edit Permissions**. An object type will not be saved to a role until you've configured its workflow permissions.
9. Select the workflow permissions the user will have per each state:
    - **All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these permissions for all states in the workflow.
    - **All Triggers:** Users can view and click all triggers on a form. The triggers that are visible to user depend on whether the object is in the state associated with the trigger. You can also select each individual trigger to grant access.
    - **Create:** Users can create a new object. This permission applies only to the Creation state of the object type.
    - **Read:** Users can view the object when it's in the selected state. You cannot select the **Edit**, **Delete**, or **Manage** permissions unless **Read** has been selected.
    - **Edit:** Users can edit existing objects in the selected state.
    - **Delete:** Users can delete existing objects in the selected state.
    - **Manage:** Users can add users from other roles to give them access to the object while it's in the selected state. Note that the added user will not see the object until it's in a state they have permission to view. **Manage** is applicable to explicit permissions only.
    - **Assign**: Once the object is in the selected state, users who have been granted permission to view the object through a role will see it in their task list on the My Tasks page. **Assign** is applicable to explicit permissions only.



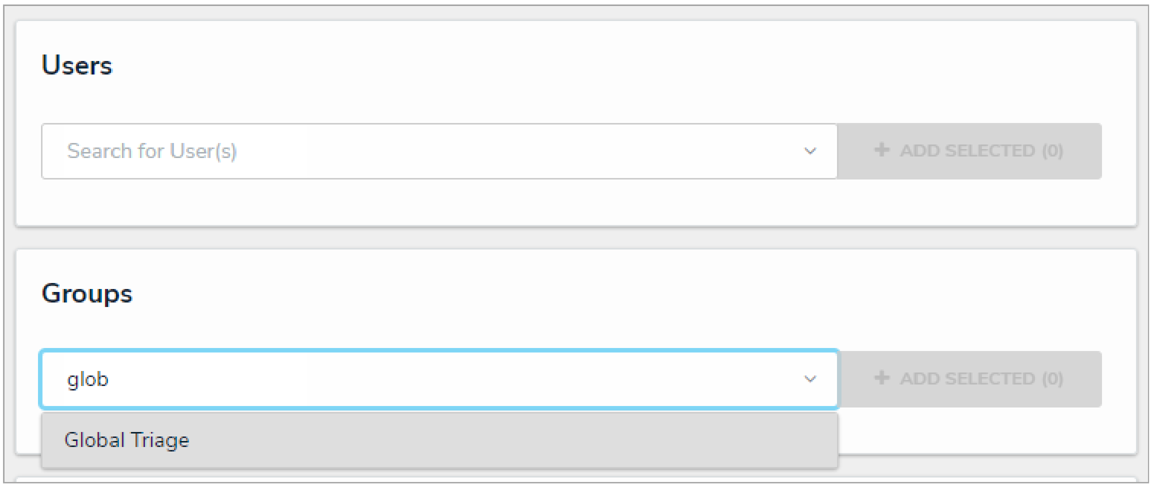
Workflow permissions.

10. From the **Select a default form for this state for this role** dropdown menu, choose the form users will see when using Search, Quick Add, an assessment table, or relationship graph:
    - If you **do not** choose a form from this dropdown menu, the object type's default form (the unconfigured list of components added to an object type) will be displayed.
    - If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator.
    - If you select a configurable form from this dropdown menu, the selected form will be displayed.

> Forms selected to display on an action, view, data visualization, or relationship table will override any selections made in the **Select a default form for this state for this role** field.

11. Click **Done** to return to the **Edit Roles** page.
12. Repeat steps 7-11 to continue adding object types as needed.
13. To add individual users to the role:
    a. In the field under **Users**, begin typing the name of the user you want to add to the role in, then press **Enter** on your keyboard or click to select the user.
    b. Repeat step a. as needed to continue adding more users, then click **Add Selected**.
14. To add a user group to the role:

a. In the field under **Groups**, begin typing the name of the group you want to add to the role, then press **Enter** on your keyboard or click to select the group.

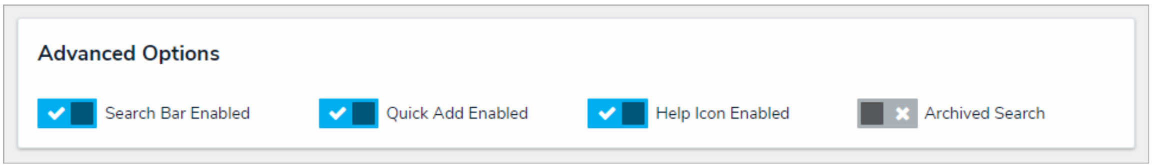


The Users and Groups sections.

b. Repeat step a. as needed to continue adding more user groups, then click **Add Selected**.

15. **Optional:** In the Advanced Options section, click the  or  icons to enable or disable the following options for users within the role:

- **Search Bar Enabled:** Shows or hides the Search field from the top bar.
- **Quick Add Enabled:** Shows or hides the Quick Add feature from the top bar.
- **Help Icon Enabled:** Shows or hides the link to the Resolver Knowledge Base from the top bar.
- **Archived Search:** Shows or hides the option to include archived data in the search results when using the **Search** function.



The Advanced Options section.

16. Click **Done** when finished.