Edit or Delete a Role

Last Modified on 11/18/2024 5:40 pm EST

Overview

Roles control the data that users can create, edit, delete, view, or manage in Resolver. Administrators can edit or delete roles from Resolver.

> **(i) Note:**
> If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence.
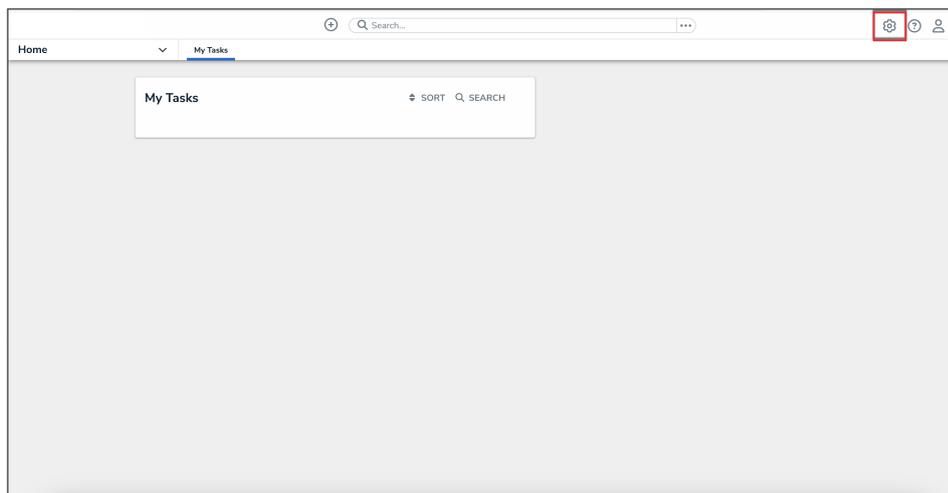
User Account Requirements

The user account used to log into Resolver must have Administrator permission to access the **Data Access** section.

Related Information/Setup

Please refer to the Roles Overview and the Create a New Role articles for more information on using roles in Resolver.
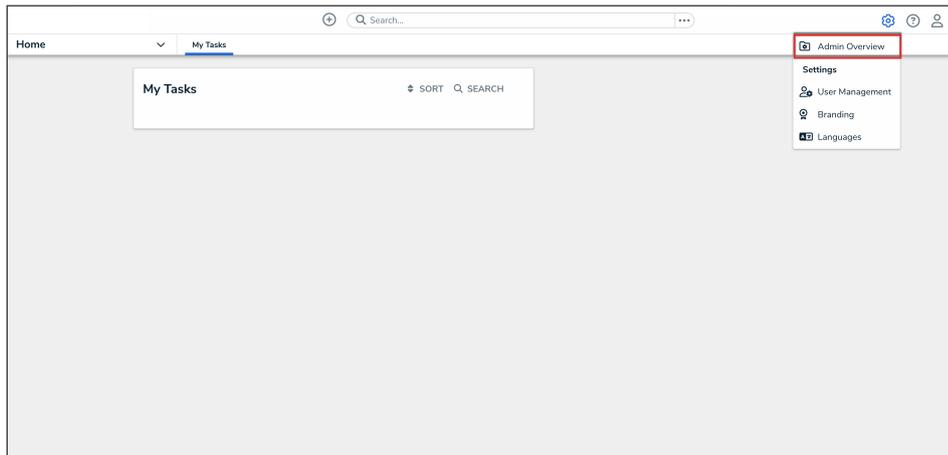
Navigation

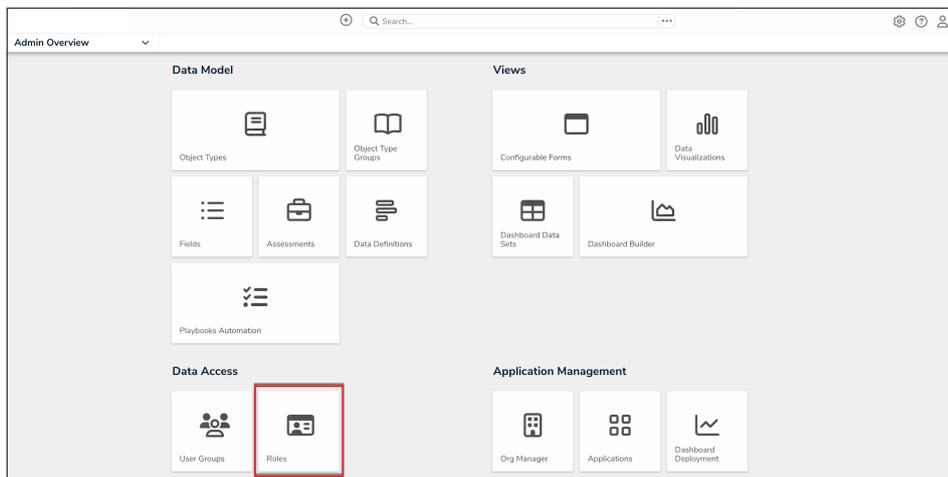1. From the **Home** screen, click the **Administration** icon.

Administration Icon

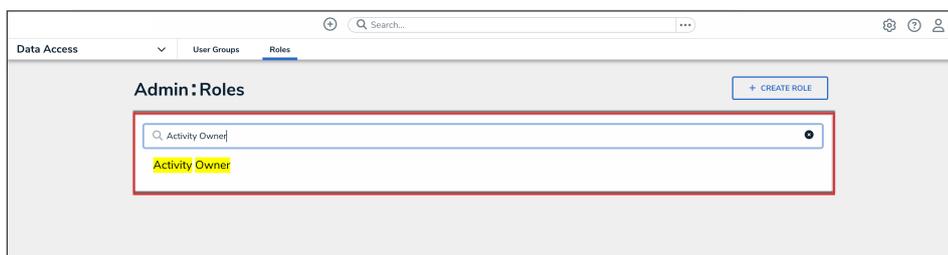2. From the **Administrator settings** menu, click **Admin Overview**.

Administrator Settings Menu

3. From the **Admin Overview** screen, click the **Roles** tile under the **Data Access** section.

Roles Tile

4. From the **Roles** screen, enter a keyword in the **Search** field to narrow the search results.


Search Field

5. Click the role that you want to edit or delete.

Editing a Role

1. From the **Edit Role** screen, you can add more object types to the role. Select the object

types from the dropdown menu in the **Object Types** section, then click the **Edit Permissions** button to edit the object type's permissions. For more information on configuring permissions, please refer to the Workflow Permissions article.
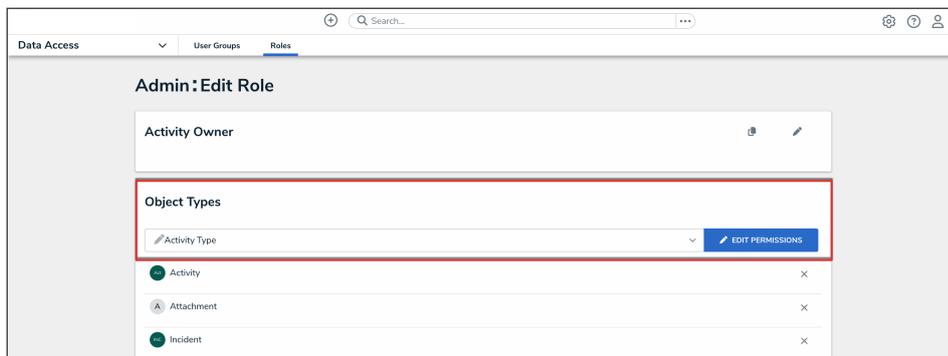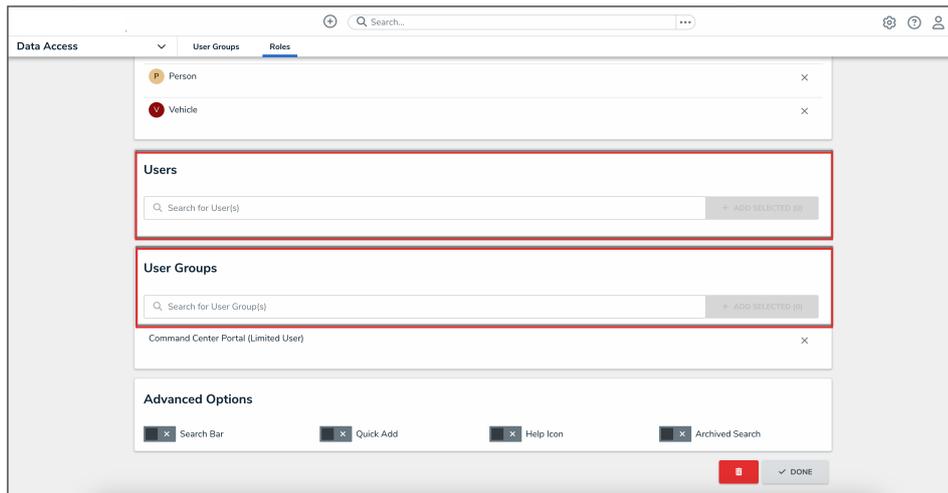

Object Types Section

2. To edit an existing object type's permissions, click the object type in the **Object Types** section, make your changes as needed, then click the **Done** button to return to the ***Edit Role*** page.
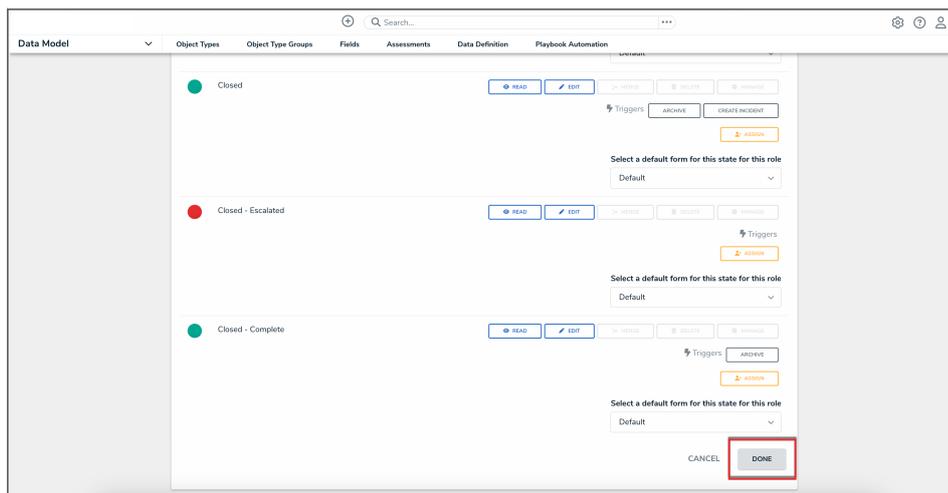

Done Button

3. To add more users or groups to the role, select them from the dropdown menus in the **Users** and **User Groups** section.
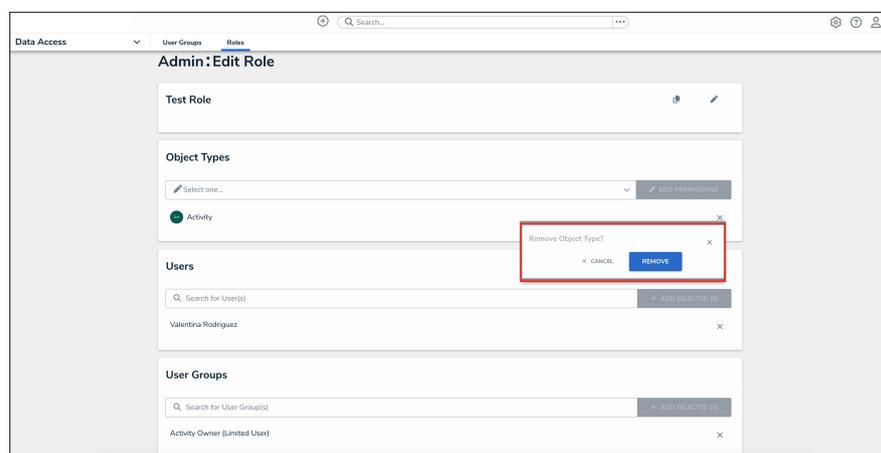
Users and User Groups

4. From the **Edit Role** screen, you can delete an object type, user, or user group from the role:

   ○ To delete an object type, user, or user group from the role, click the **Remove** icon next to the object type, user, or user group you want to delete.
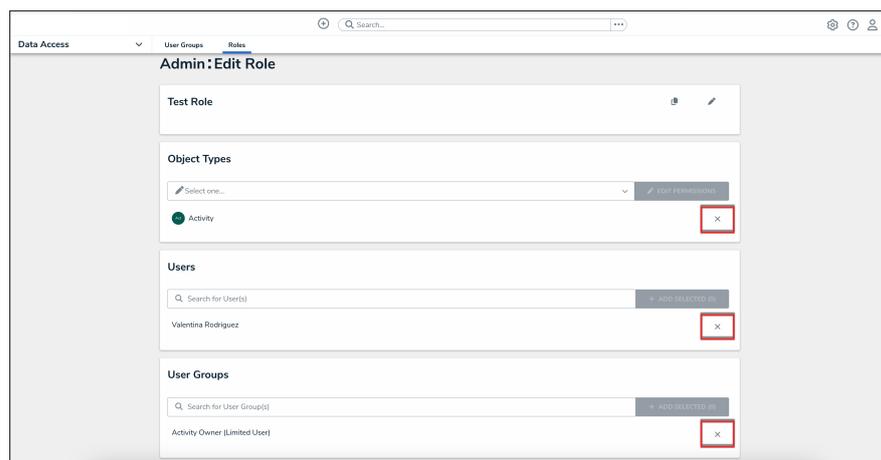
Remove Icon

   ○ From the **Remove** pop-up, click the **Remove** button.

> ⚠️ **Warning:**
> Roles determine a user's eligibility to access objects only. Removing a user from a role with explicit permissions after they've been granted direct access to an object does **not** automatically revoke their access to that object. Another user with the appropriate permissions must revoke access by removing the user from the role field on the object's form.

5. **(Optional):** In the **Advanced Options** section, you can select which advanced options to to enable or disable for users within the role. Please refer to the Advanced Options on Roles article for more information.

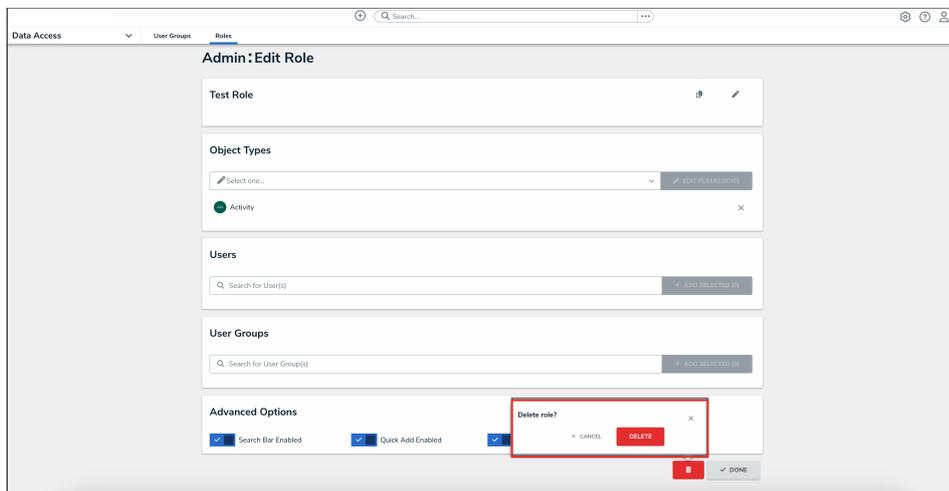6. Click the **Done** button to save your changes.

Done Button

Deleting a Role

1. From the ***Edit Role*** screen, you can delete a role. Click the **Delete** icon to delete the role.
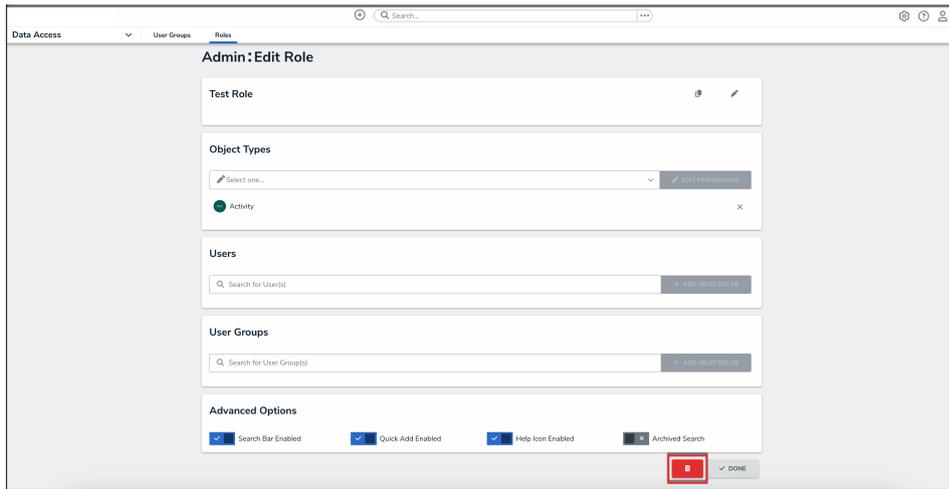
Delete Icon

2. From the **Delete role?** pop-up, click the **Delete** button.

Delete Button