

Add a Role Management Action on a Transition

Last Modified on 03/20/2022 5:10 pm EDT


The **Role Management** action automatically adds a user within a specified role with explicit permissions to the object once it has successfully transitioned into its next state. This action is used to allow users within the role the ability to view objects in their next states without adding them manually through the role element on a configurable form. For example, you want allow users in the Manager role to view any incident that transitions to the Under Investigation state.

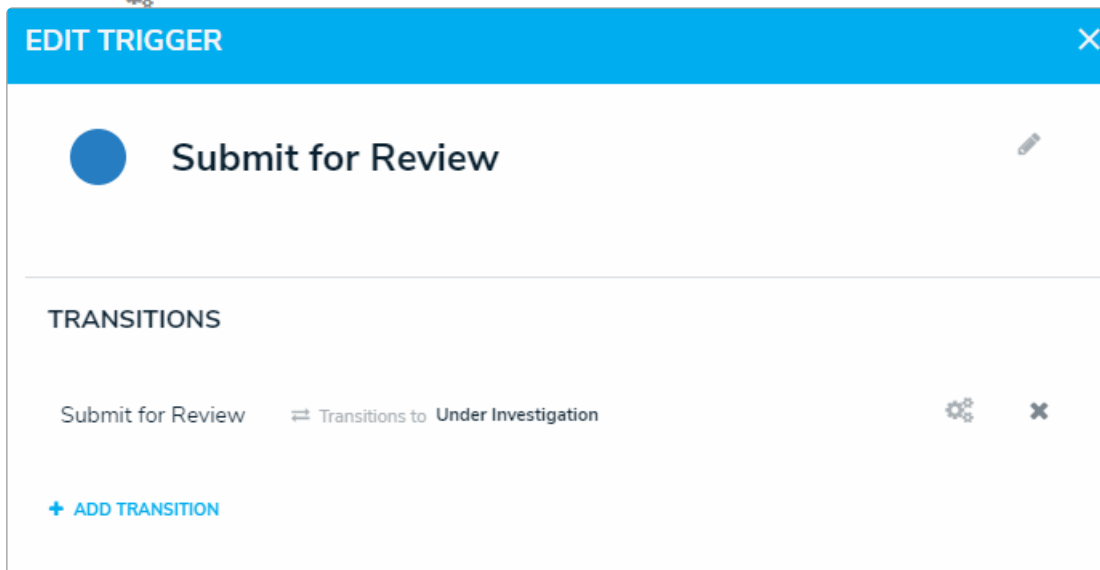
Before you can create this action on a workflow state, a transition must be created. See [Add a Trigger & Transition to a State](#) article for instructions.



The role(s) added to the **Role Management** action must be properly configured for the selected object type and workflow state. See the [Roles](#) and [Workflow Permissions](#) sections for more information.

To add a Role Management action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.

EDIT TRIGGER [X]

Submit for Review [edit icon]

TRANSITION DETAILS

Name
Submit for Review

Destination State
● Under Investigation [v]

Bypass Required Fields. [?]

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

[✓] DONE

The Transition Details, Conditions, and Actions sections of the Edit Trigger palette.

4. Select **Role Management** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Select **Add Current User to Role** from the **Select Type of Role Change** dropdown menu.
7. Select the roles that should receive the email from the **Roles** dropdown menu.
8. Select one or more roles from the **Roles** dropdown menu or search for roles as needed.

ACTIONS

Type

Role Management

Name

Assign to Manager

Select Type of Role Change

Add Current User To Role

Roles

Managers

CANCEL **✓ CREATE**

A new Role Management action.

9. Click **Create**.