Add a Role Management Action on a Transition

Last Modified on 09/13/2024 3:18 pm EDT

Overview

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 in a configurable form. For example, you want to allow users in the Manager role to view any incident that transitions to the Under Investigation state.

Before you can create this action in a workflow state, a transition must be created.

Note:
The role(s) added to the Role Management action must be properly configured for the selected object type and workflow state.

User Account Requirements

The user must have Administrator permissions in order to access the ***Admin Overview*** screen.

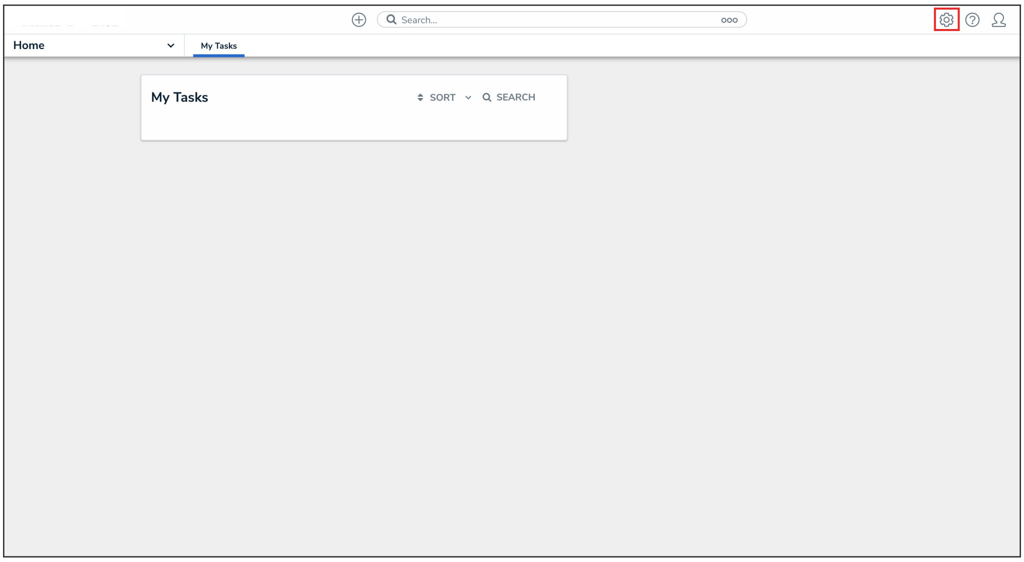
Required Information/Setup

Please refer to the Add a Trigger & Transition to a State article for instructions on how to add triggers and transitions.

Please refer to the Roles and Workflow Permissions sections for more information on configuring roles and workflow permissions.

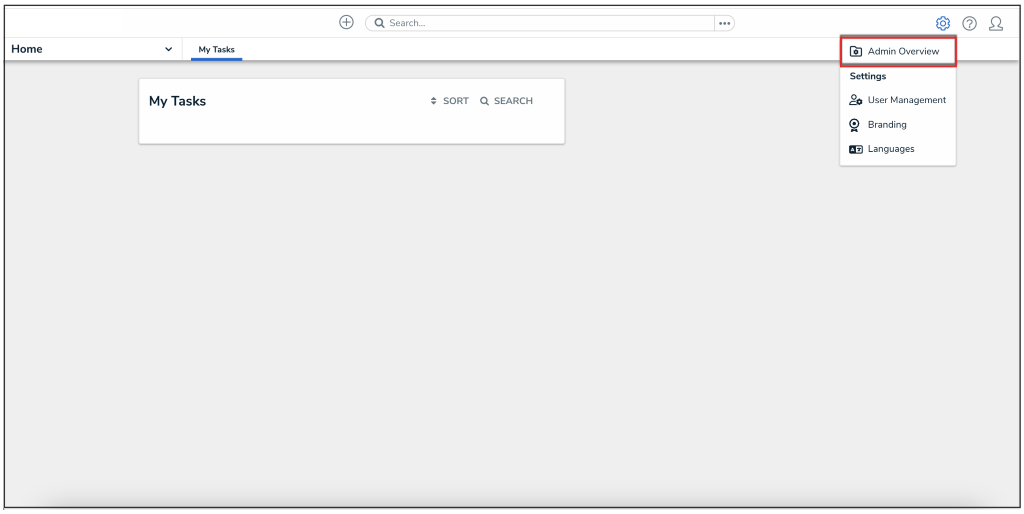
Navigation

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



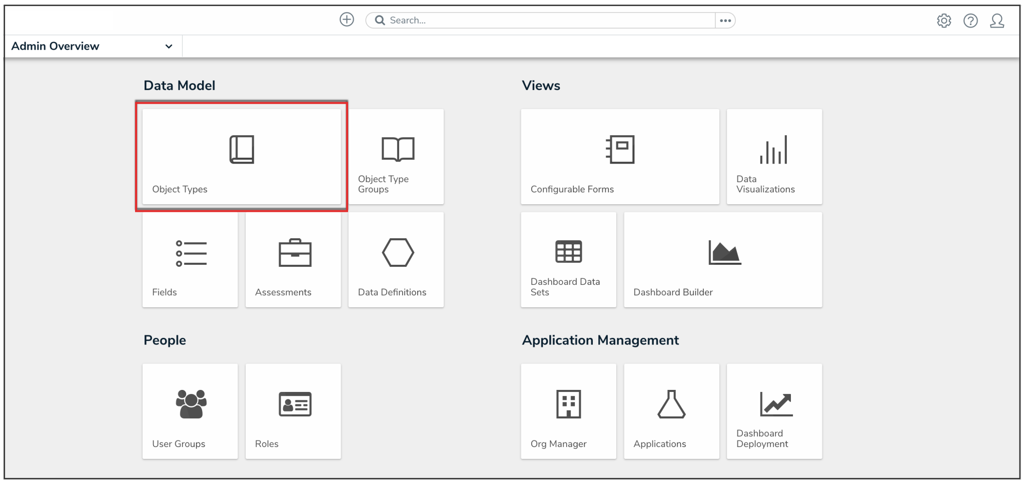
Administration Icon

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



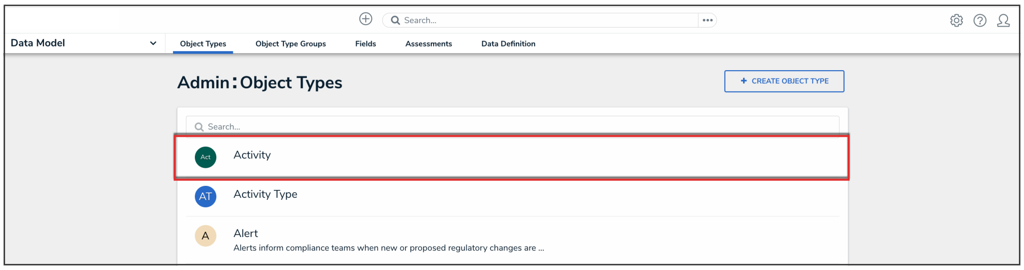
Administrator Settings Menu

3. From the ***Admin Overview*** screen, click the **Object Types** tile under the **Data Model** section.



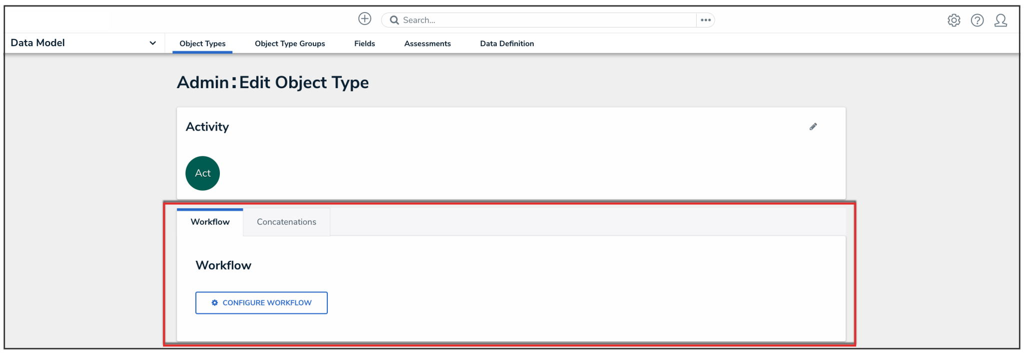
Object Types Tile

4. From the ***Object Types*** screen, enter an object type name in the **Search** field to narrow down the object types list.
5. Click the object type name you want to edit.



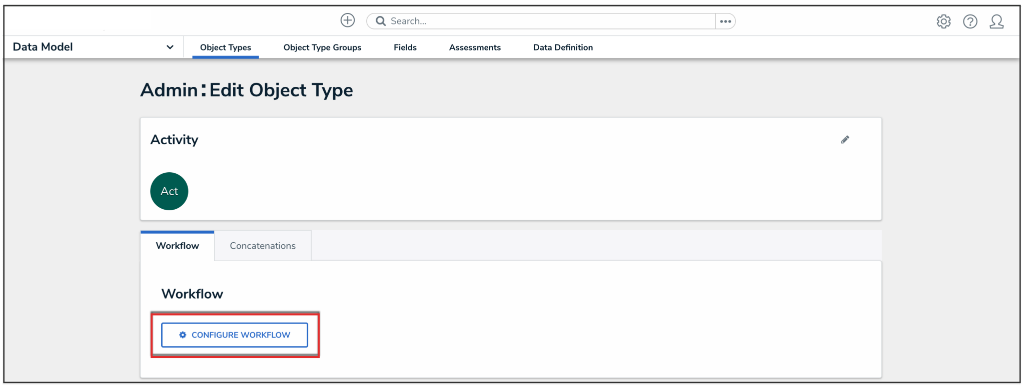
Object Type Name

6. From the ***Edit Object Type*** screen, click a workflow under the **Workflow** tab.



Workflow Tab

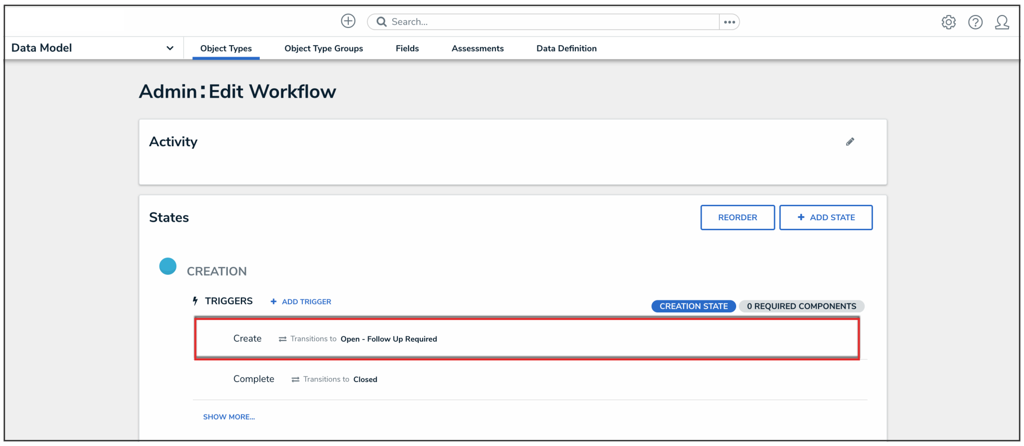
7. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

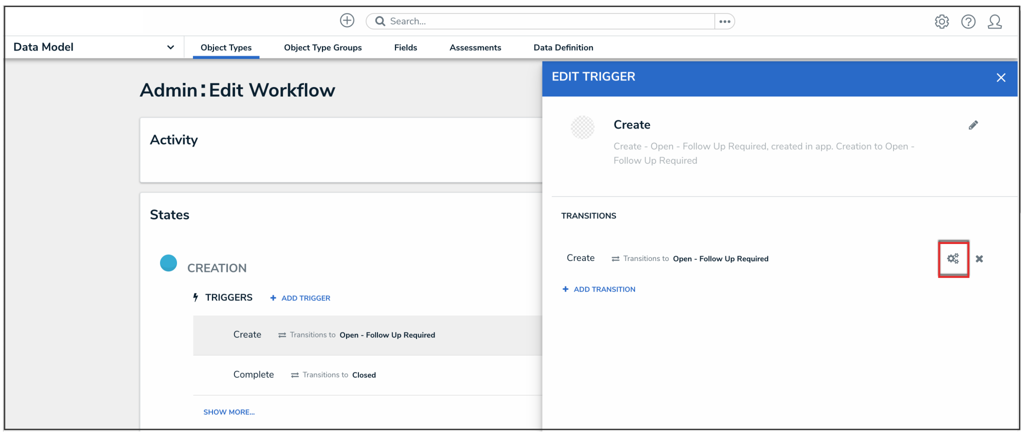
Add a Role Management Action to a Transition

1. From the ***Edit Workflow*** screen, click the trigger that you want to add the Role Management action to.



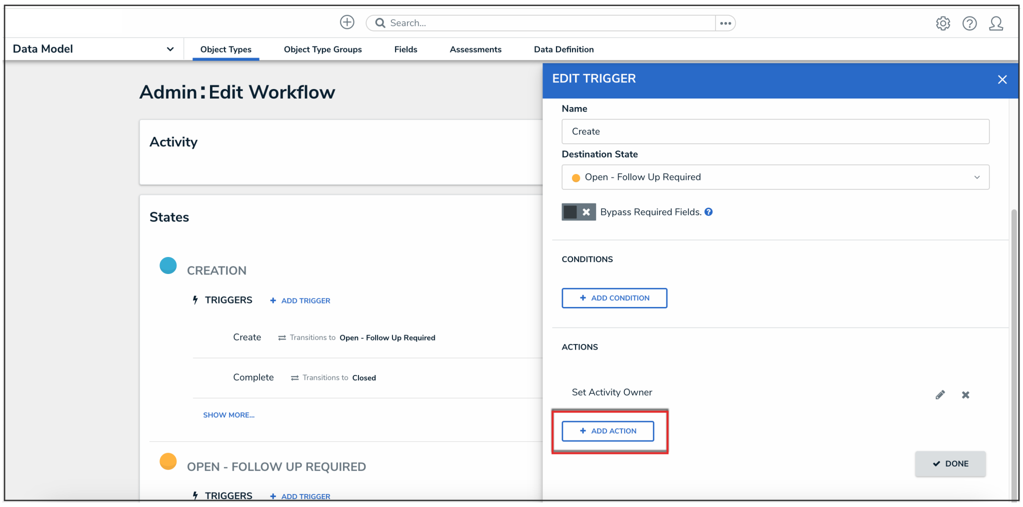
Workflow Trigger

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



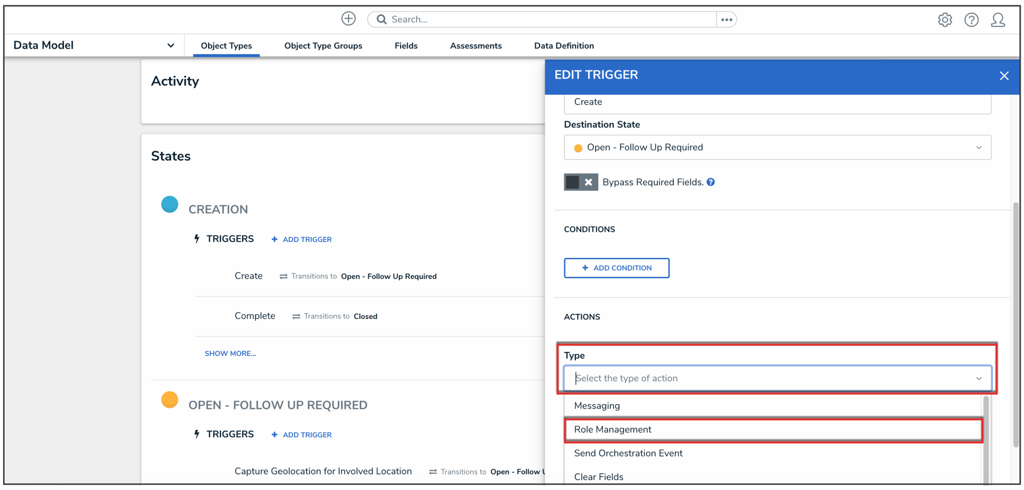
Configure Icon

3. Click the **Add Action** button under **Actions**.



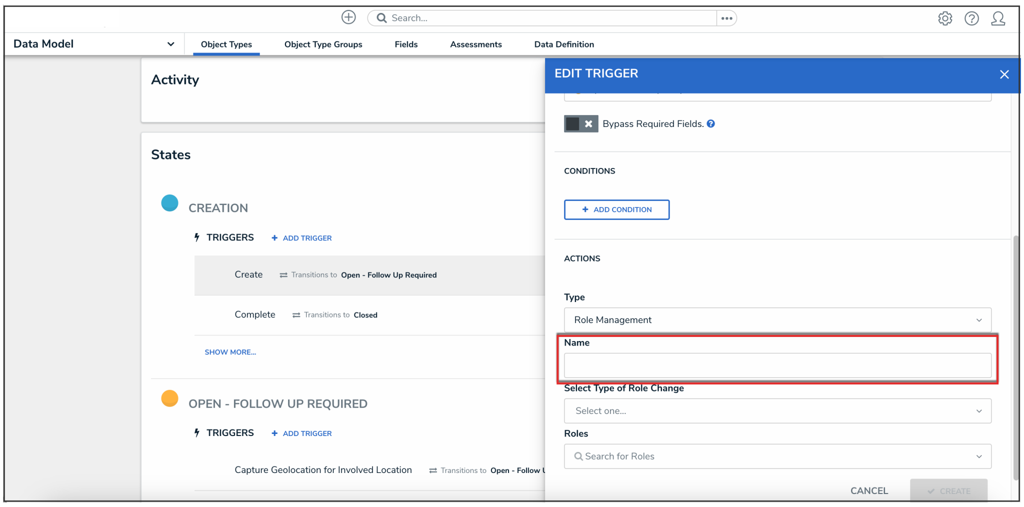
Add Action Button

4. Select **Role Management** from the **Type** dropdown menu.



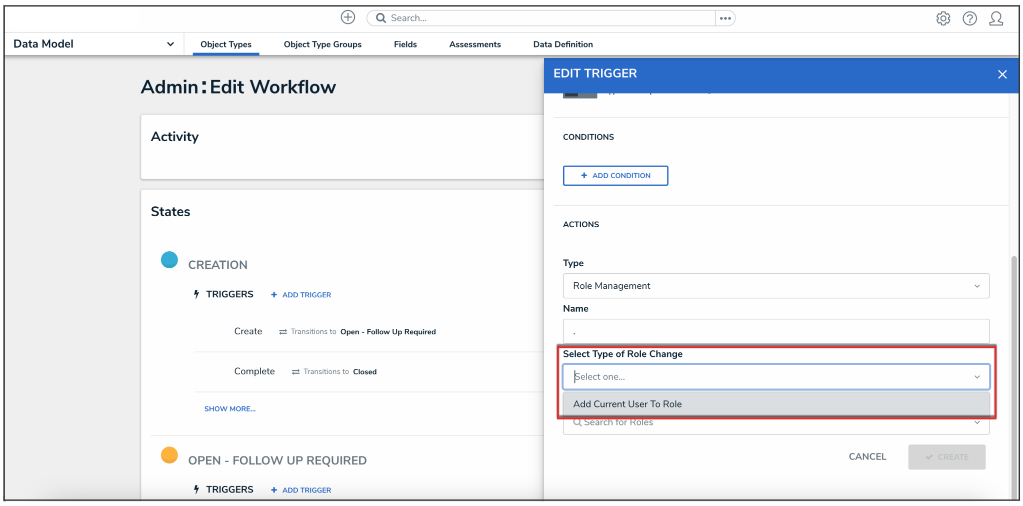
Type Dropdown

5. Enter a name for the action in the **Name** field.



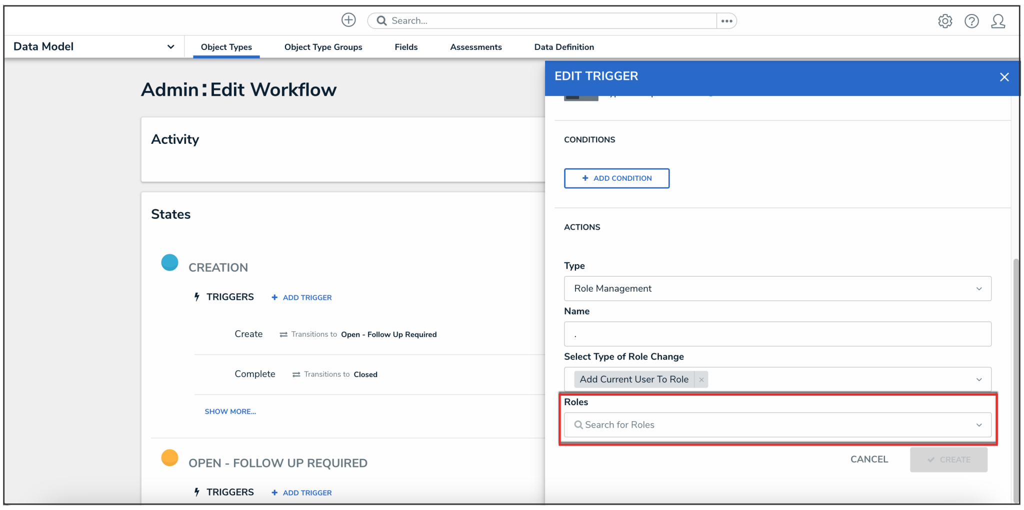
Name Field

6. Select **Add Current User to Role** from the **Select Type of Role Change** dropdown menu.



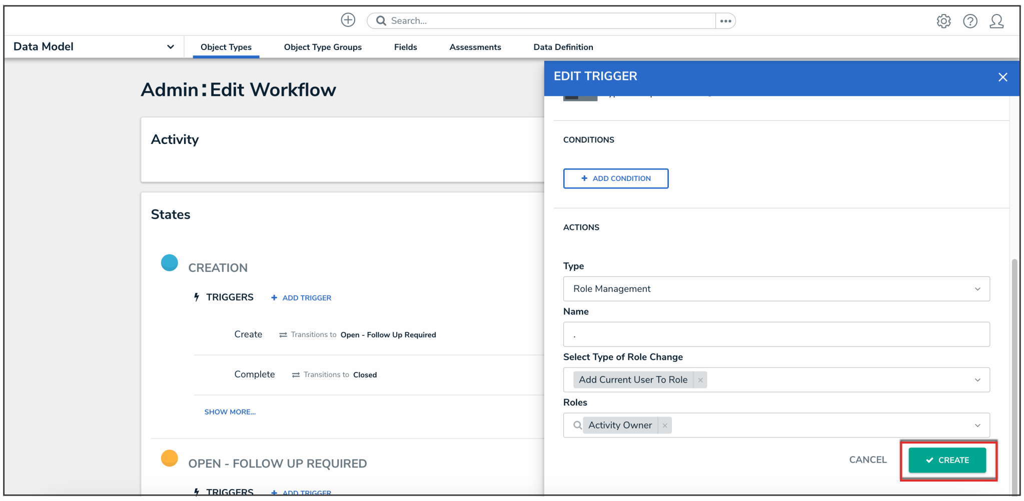
Select Type of Role Change Dropdown

7. Select the roles that should receive the email from the **Roles** dropdown menu.



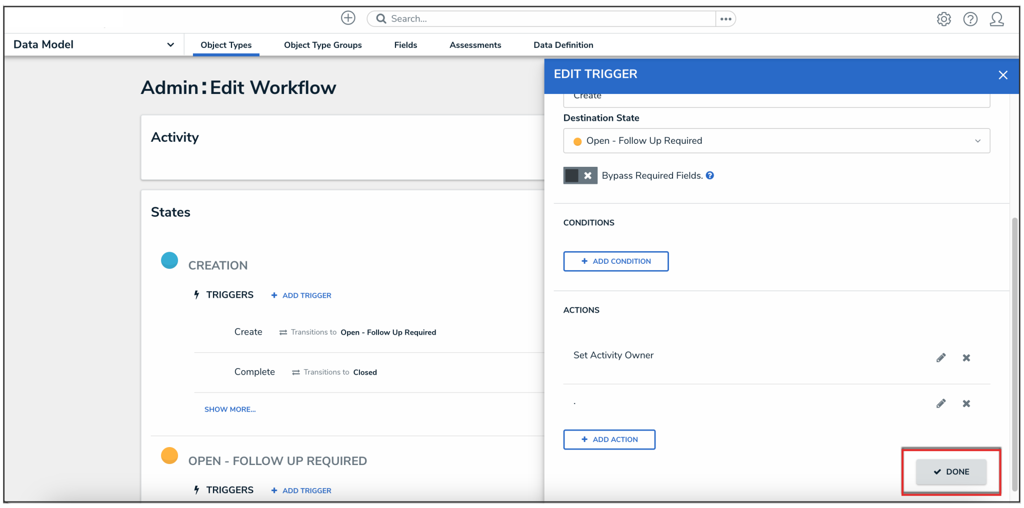
Roles Dropdown

8. Click the **Create** button.



Create Button

9. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.



Done Button