Identify a Conflict & Set a Form's Priority
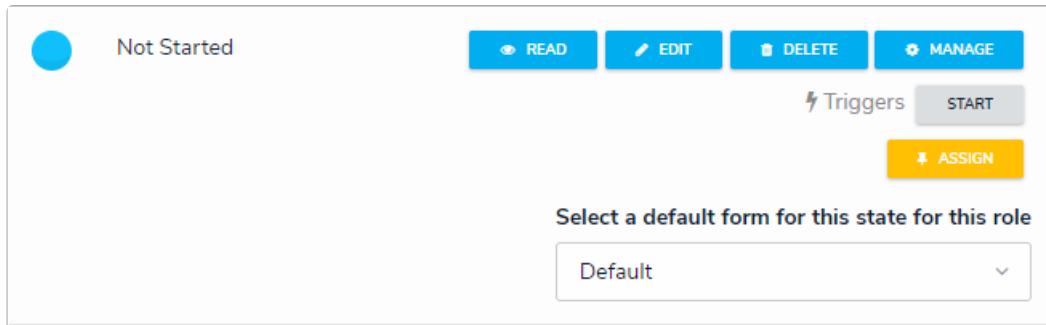
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If a user belongs to two or more roles that have permission to view the same object, but each role should be accessing that object through a different standard form (including palette forms) a form conflict exists. To resolve this, administrators can use the impersonation feature to identify any conflicts, then assign number priorities to the forms to ensure the correct form is displayed.

Important Notes

- The **Priority** field accepts up to nine numeric characters, with a range of -999999999 to 999999999.
- The higher the number entered, the higher the form's priority, with negative numbers being lower (e.g. -1 is a lower priority than 0). For example, if you assign one conflicting form a 1 priority and the other conflicting form a 2 priority, the form with a 2 priority would be displayed before the form with a 1 priority.
- By default, all forms are assigned a 0 (none) priority.
- If the form you wish to display to the user has been assigned a higher priority than all other conflicting forms, it's not necessary to assign lower priorities to those forms.

- Entering **Impersonation Mode** for the user after assigning a priority will still display the blue banner to indicate that a potential form conflict exists. However, clicking the ellipsis will display the priorities assigned to the conflicting forms and allow you to edit them as needed.
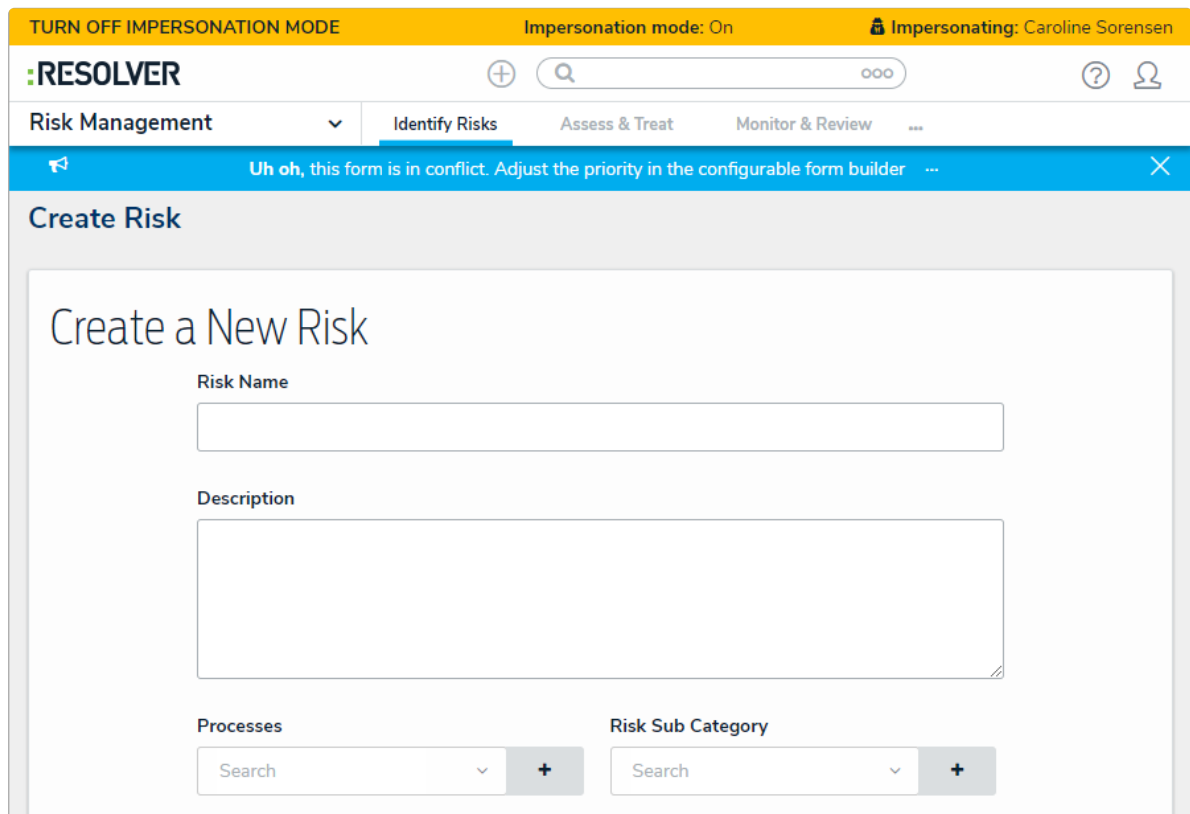
To identify a conflict and set a form's priority:

1. Assign the user you'll impersonate to an object by:

   - Adding the user via the role element on a form, then creating a view using the object type's default form; or
   - Assigning the user via the **Assign** permission on the role, ensuring the **Default** option is selected for the appropriate state in the **Select a default form for this state for this role** dropdown menu in the role's workflow permissions. This method should be selected if you'll be using the search function to locate the object once **Impersonation Mode** is activated.

The Assign option for a role's workflow permissions with the Default option selected.

2. Click the ⚙ icon in the top bar **> Users** in the **People** section.

3. Click **Impersonate** beside the name of the user to turn on **Impersonation Mode**. See the Impersonate Another User article for more information on using this feature.

4. Navigate to the object according to the assignment method in step 1. If a conflict exists, a blue banner will be displayed.
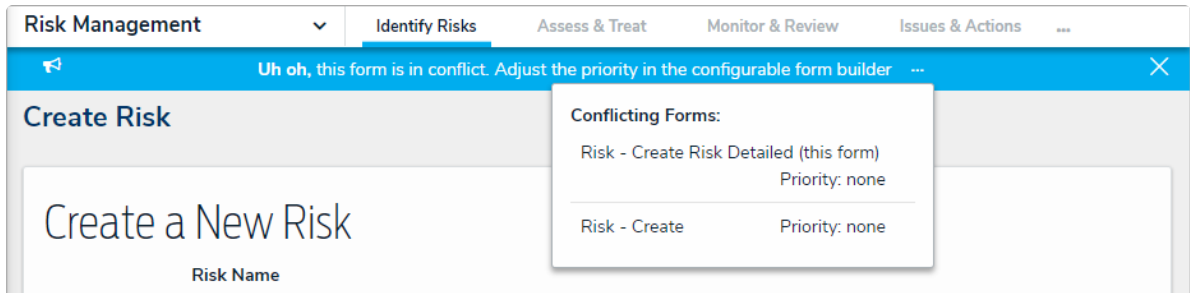

Viewing a form that's in conflict while in Impersonation Mode.
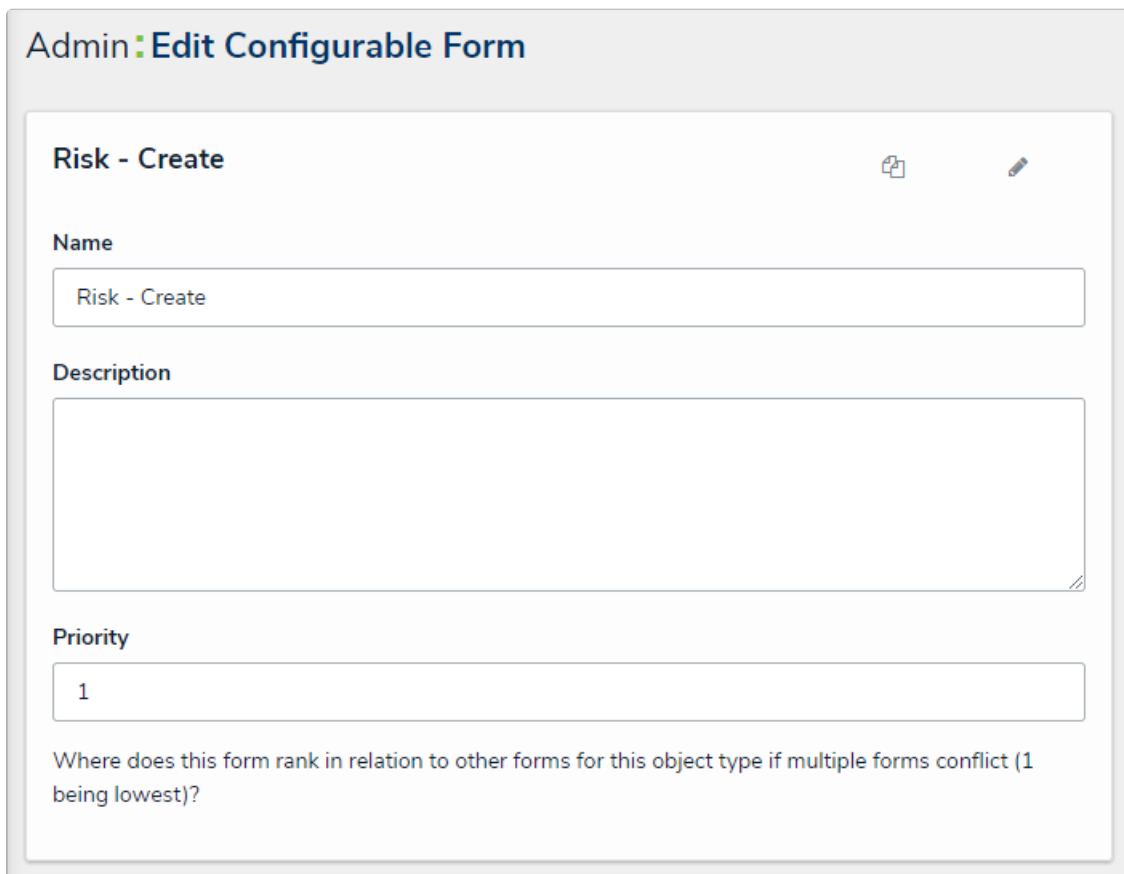
> ℹ️ If a form and a palette are both in conflict, two blue banners will appear at the top of your screen.

5. Click the ellipsis in the blue banner to display the forms in conflict.

Clicking the ellipsis in the blue banner will display all the forms that are currently in conflict for the impersonated user.

6. Click a form to display the **Edit Configurable Form** page, which will disable **Impersonation Mode**.

7. Click the ✏ icon at the top of the page to display the **Name**, **Description**, and **Priority** fields.

8. Enter a number in the **Priority** field.

Assigning a priority to form to remove any form conflicts.

9. **Optional:** Repeat the steps above to assign other conflicting forms a priority. Note that if the form you wish to display to the user has been assigned a higher priority than all other conflicting forms, it's not necessary to assign lower priorities to those forms.

Entering **Impersonation Mode** for the user after assigning a priority will still display the blue banner to indicate that a potential form conflict exists. However, clicking the ellipsis will display the priorities assigned to the conflicting forms and allow you to edit them as needed.

Uh oh, this form is in conflict. Adjust the priority in the configurable form builder ···

Conflicting Forms:

Risk - Create Risk Detailed (this form)

Priority: 1

Risk - Create   Priority: none

Clicking the ellipsis in the blue banner will display the forms' priorities, if any.