

Identify a Conflict & Set a Form's Priority

Last Modified on 02/28/2025 1:15 pm EST

Overview

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 mode to identify any conflicts, then assign number priorities to the forms to ensure the correct form is displayed.

User Account Requirements

The user must have Administrator permissions to use Impersonation mode.

Related Information/Setup

Please refer to the Impersonate Another User article for more information on using Impersonation mode.

Navigation

To identify a conflict and set a form's priority, you must first assign the user you'll impersonate to an object by completing one of the following:

- Adding the user via the role element on a form, then creating a view using the object type's default form
- 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 drop-down menu in the role's workflow permissions

Note: This method should be selected if you'll be using the search function to locate the object once Impersonation mode is activated.

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



			G Search			\$ ® 2
Home	~	My Tasks				
	My Tasks		\$ SORT	Q SEARCH		

Administration Icon

2. From the Administrator settings menu, click User Management.

			 \$?	0
Home	✓ My Tasks		Admin Overview		
			Settings		
	My Tasks	\$ SORT Q SEARCH	20 User Management		
			Branding		
			Languages		

Administrator Setting Menu

3. On the *User Management* screen, from the list of users, click the **Impersonate** button beside the user that you want to impersonate.

	•	Q Search			\$ ® \$
Settings	V User Management Branding	Languages			
	User Management		- REASSIGN DATA	🛓 EXPORT AS CSV 🛛 🕂 CREATE USER	
	Q Search				
	100 Licensed Users 12 Enabled 0 Inactive 3	Active/inactive users	User permissions	User groups	
		Select filters 🗸 🗸	Select filters ~	Select filters V	
	Aitana Yang aitana yang@email.com Last login: Never			IMPERSONATE	
	 Allan Barrow allan.barrow@email.com Last login: Never 			IMPERSONATE	

Impersonate Button

Identifying a Conflict and Setting a Form's Priority

 Navigate to the object according to the assignment method in the Navigation section. If a conflict exists, a blue banner will display while in Impersonation mode. The banner will not show for end users using Resolver normally.



TURN OFF IMPERSONATION N	IODE		Impersonation mode:	On 🤷 🔒	mpersonatin	g : Caroline Sorensen
:RESOLVER		\oplus		000)	② Ω
Risk Management	~	Identify Risks	Assess & Treat	Monitor & Review	***	
📢 Uh o	h, this fo	rm is in conflict. Ac	djust the priority in the c	onfigurable form builde	er	×
Create Risk						
Create a New Risk Name Description	Risk	<	Risk Sub Ca + Search	ategory	· +	

Conflict Banner



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



Conflicting Forms

- 3. Click a form to display the *Edit Configurable Form* page. This will turn off Impersonation mode.
- Click the Edit icon at the top of the page to display the Name, Description, and Priority fields.



		÷	Q Search)		¢	0 2
Views ~	Forms Da	ta Visualizations	Dashboard Data Sets	Dashboard Builder				
Admin:Edit Confi	gurable Fo	orm				FORM	ELEMENTS	
Risk - IRM - Create Object Type: Risk					8	Proper	ties	÷
Form Layout			ה			Fields		-
1 COLUMN LE	EFT SIDEBAR	RIGHT SIDEBA	R			Actor Archiv Comr Dispo	red Date nents on sition	

Edit Icon

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

(Q Search	•••		\$ @ \$
Views v Forms Data Visualizations Dashboard Data Sets Dashboard Builder			
Admin: Edit Configurable Form		ħ	FORM ELEMENTS ×
Risk - IRM - Create *Name	đ		Properties +
Risk - IRM - Create Description			
			Fields 📃
			Actor
Priority		-	Archived Date
10			Comments on Disposition
Where does this form rank in relation to other forms for this object type if multiple forms conflict (1 being lowest)?			Consequences

Priority Field

6. **(Optional):** Repeat the steps above to assign other conflicting forms a 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.

(i) Note:

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.

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.