Create & Modify Roles

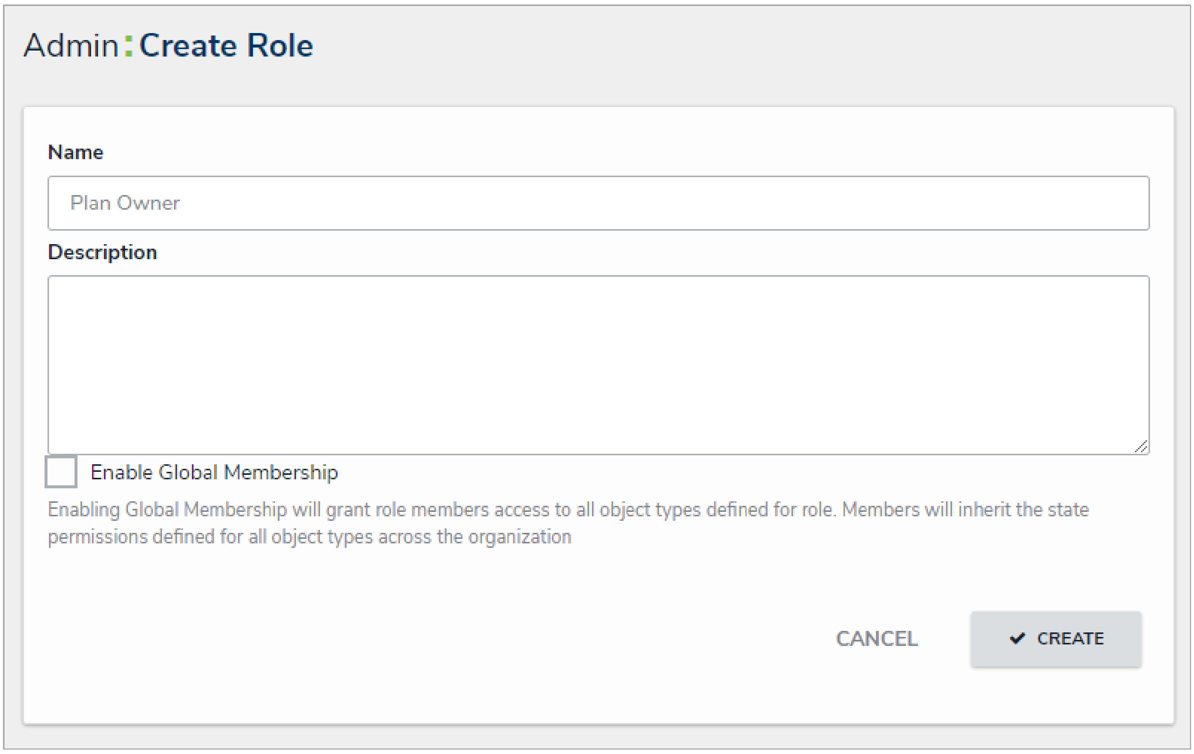
The enabled triggers and permissions in the following steps are recommended; however, you can adjust these triggers and permissions as needed.

To avoid creating duplicate data, it's recommended that admins perform a search to confirm the following roles don't already exist in their organization. For more detailed information on roles and permissions, see the Roles section and Workflow Permissions article in the **Resolver Core Administrator's Guide**.

Create a New Role

To create a new role:

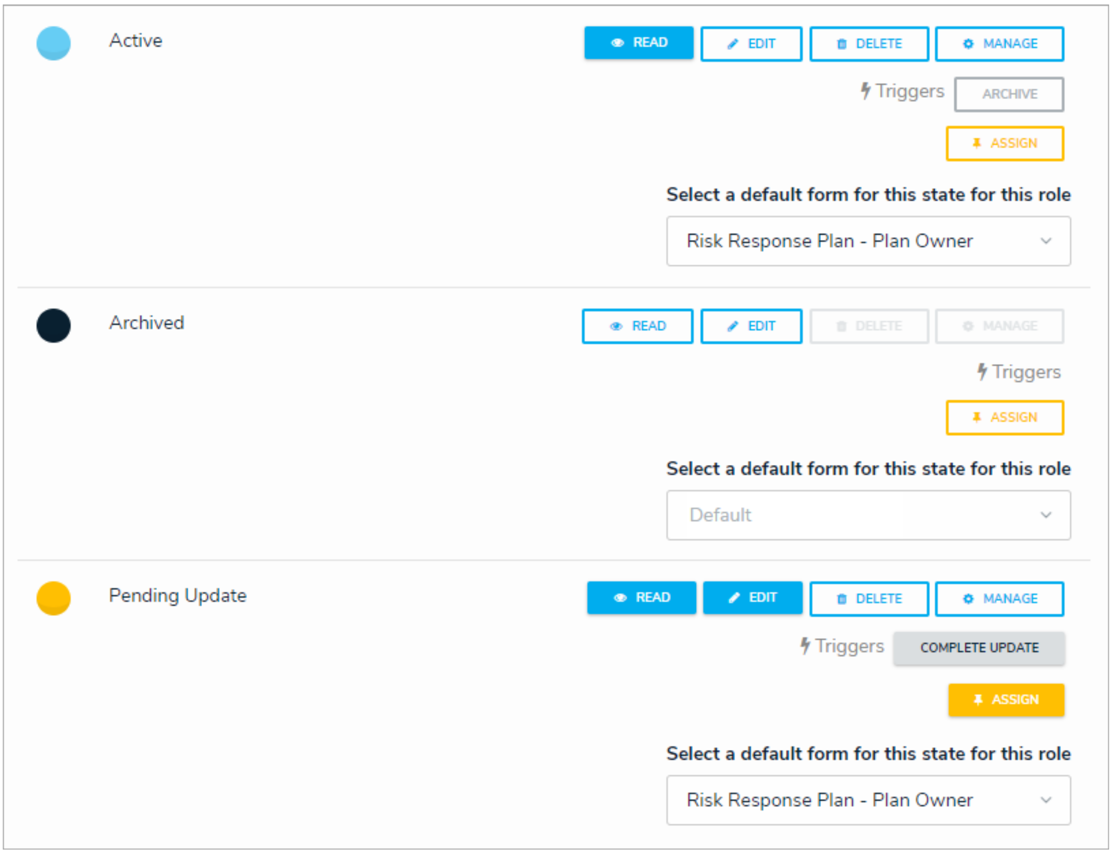
1. Click the icon in the top bar **> Roles** in the **People** section.
2. Click **Create Role** to display the **Create Role** page.
3. Enter **Plan Owner** in the **Name** field.
4. Ensure the **Enable Global Membership** checkbox is **not** selected.



5. *The Create Role page.*
6. Click **Create** to display the **Edit Role** page.
7. In the **Object Types** section, begin typing, then select **Risk Response Plan**.

The Edit Role page.

8. Click **Edit Permissions.**
9. On the **Active** state:
    a. Enable **Read** permissions.
    b. Select the **Risk Response Plan - Plan Owner** form.
10. On the **Pending Update** state:
    a. Enable **Read**, **Edit**, and **Assign** permissions.
    b. Enable the **Complete** update trigger.
    c. Select the **Risk Response Plan - Plan Owner** form.



Workflow permission.

11. Click **Done** to return to the previous page.
12. Add the appropriate users and/or user groups to the role through the **Users** and **Groups** sections on the **Edit Role** page. See the Users and User Groups sections in the **Resolver Core Administrator's Guide** for more information.

Modify Existing Roles

To modify the permissions on existing roles:

1. Click the icon in the top bar > **Roles** in the **People** section.
2. Select the **Risk Team** role.
3. Select the **Risk Response Plan** object type in the **Object Types** section, then click **Edit Permissions**.
4. Enable the **All Triggers**, **Create**, **Read**, **Edit**, and **Manage** permissions at the top of the page for all workflow states.
5. Select the **Risk Response Plan - Risk Team** form for all workflow states.
6. Repeat steps 1-3 for the **Risk Owner** role.
7. Enable the **All Triggers**, **Create**, **Read**, **Edit**, and **Manage** permissions.
8. Select the **Risk Response Plan - Risk Team** form for all workflow states.