Roles & Permissions

Last Modified on 12/11/2024 4:33 pm EST

Create a New Role

Overview

Roles control the data that users can create, edit, delete, view, or manage in Resolver by adding individual users or user groups to a role, selecting the object type(s) those users can see, applying either **global** or **explicit** permissions, then configuring the workflow permissions for each object type added to the role.

Note:
If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence. You can review which roles an individual user has been added to from the **User Memberships** section on the ***Edit User*** screen.

User Account Requirements

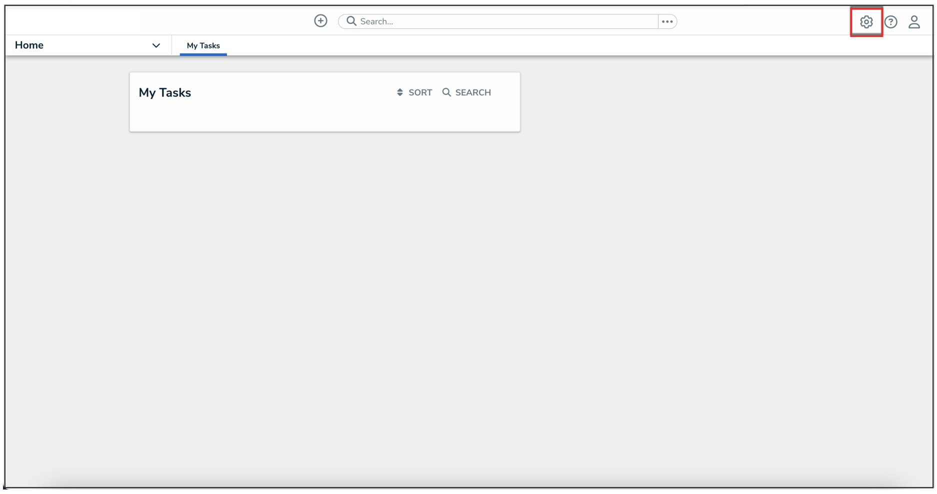
The user must have Administrator permissions to access the **Data Access** section in the ***Admin Overview*** screen.

Related Information/Setup

Please refer to the Roles Overview article for more information on using roles in Resolver.

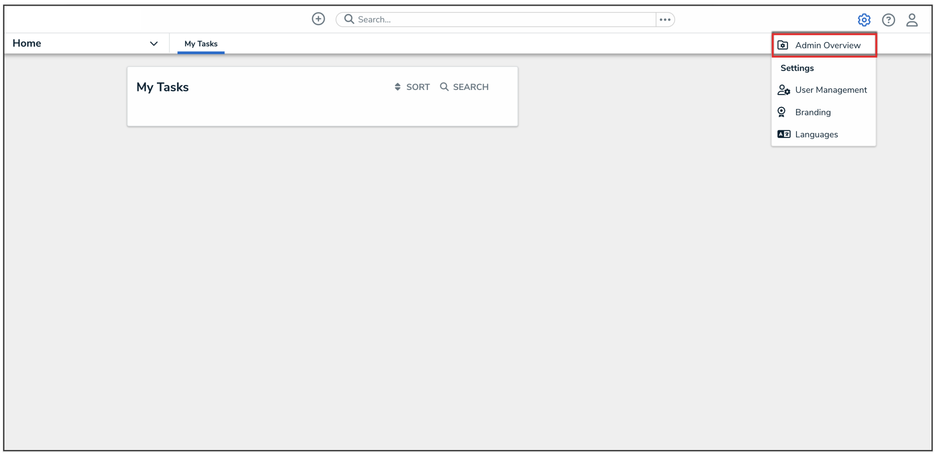
Navigation

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



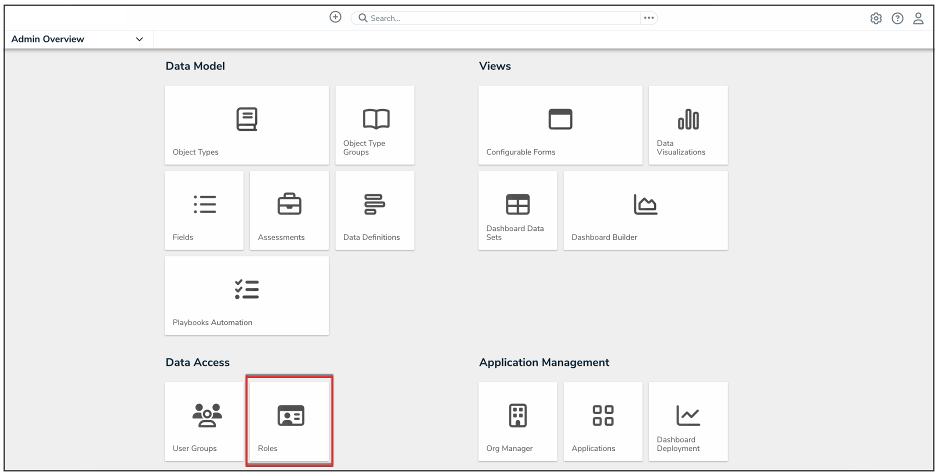
Administration Icon

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



Administrator Settings Menu

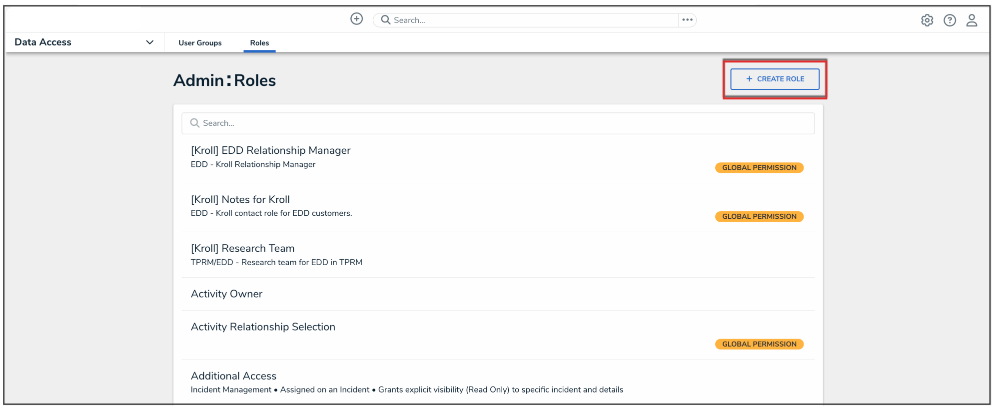
3. From the ***Admin Overview*** screen, click the **Roles** tile under the **Data Access** section.



Roles Tile

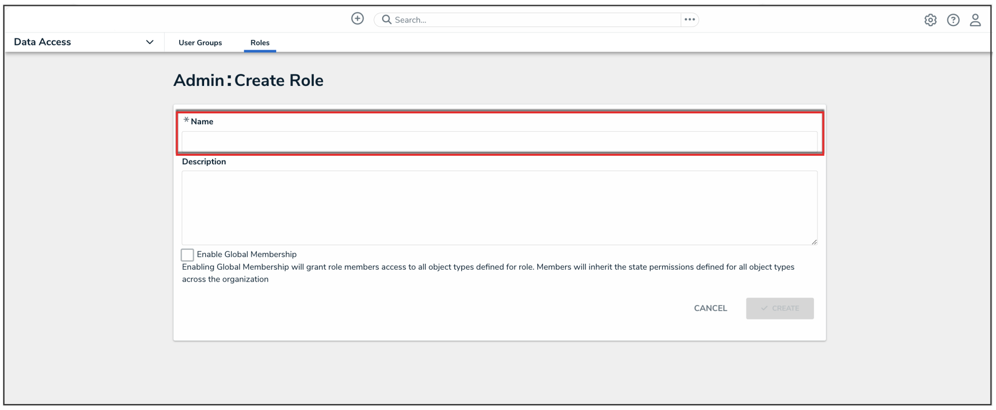
Creating a New Role

1. From the ***Roles*** screen, click the **Create Role** button.



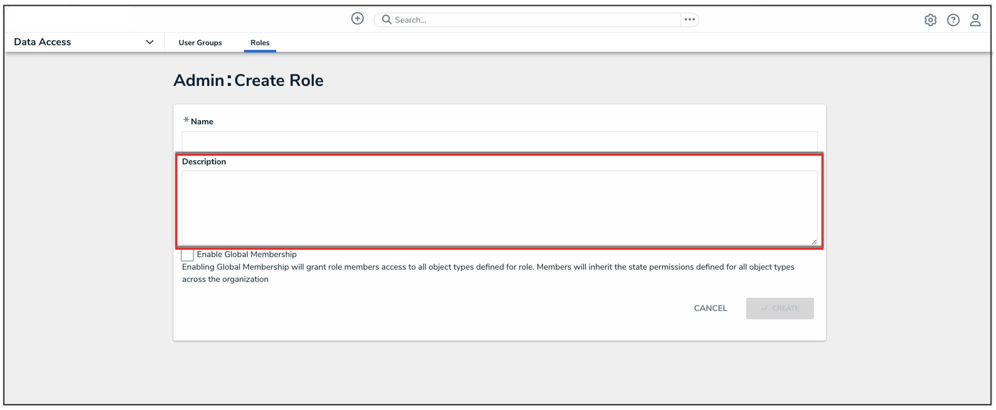
Create Role Button

2. Enter the name for the role in the **Name** field.



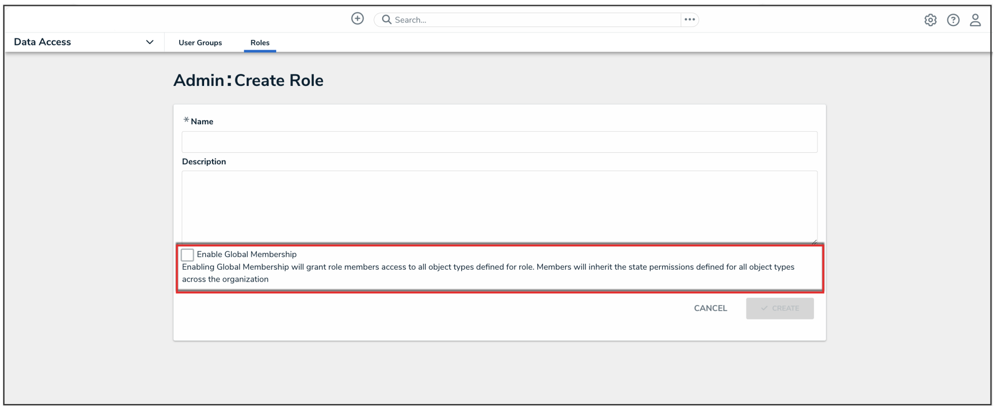
Name Field

3. **(Optional):** Enter a description of the role in the **Description** field. This description will appear below the role's name when editing it.



Description Field

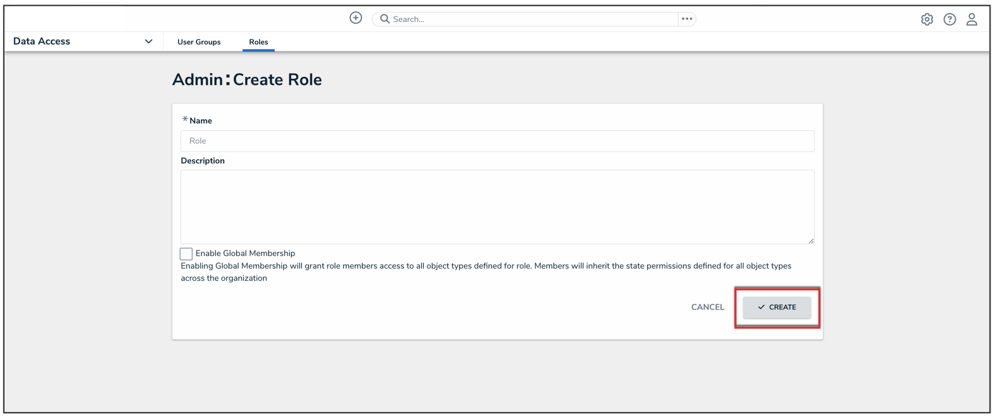
4. **(Optional):** Select the **Enable Global Membership** checkbox if you wish to grant this role global permissions.



Enable Global Membership Checkbox

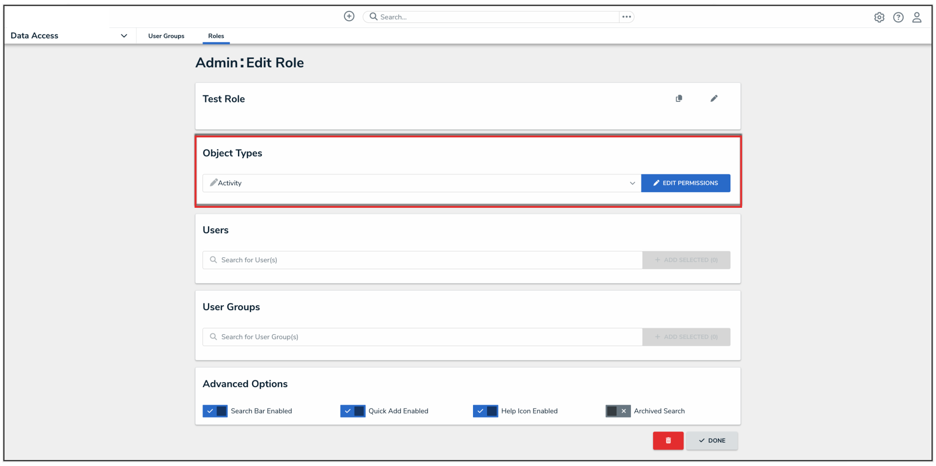
> ***Note:***
> Once a role is created, you cannot enable or disable global membership (permissions) from the ***Edit Roles*** screen. To enable or disable global permissions on an existing role, you must delete then recreate the role.

5. Click the **Create** button.



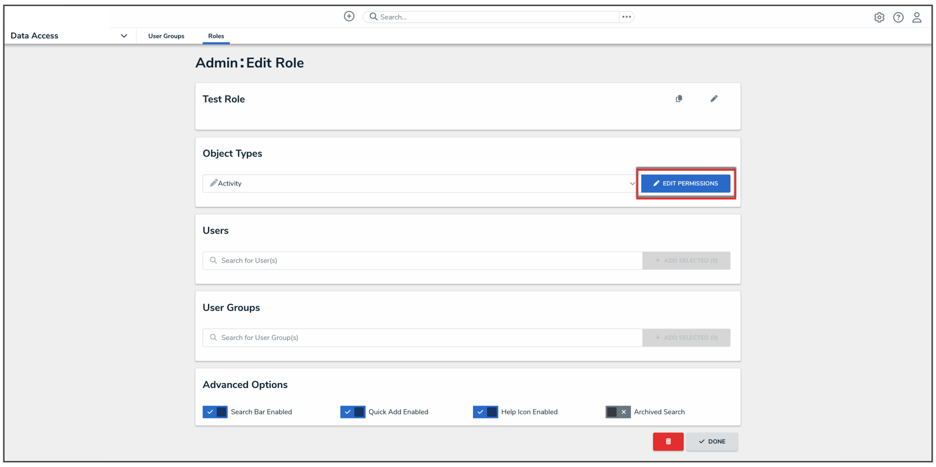
Create Button

6. In the field under **Object Types**, type the name of the object type you want to add, then press **Enter** on your keyboard or select it from the dropdown menu.



Object Types Field

7. Click the **Edit Permissions** button to configure the workflow permissions.



Edit Permissions Button

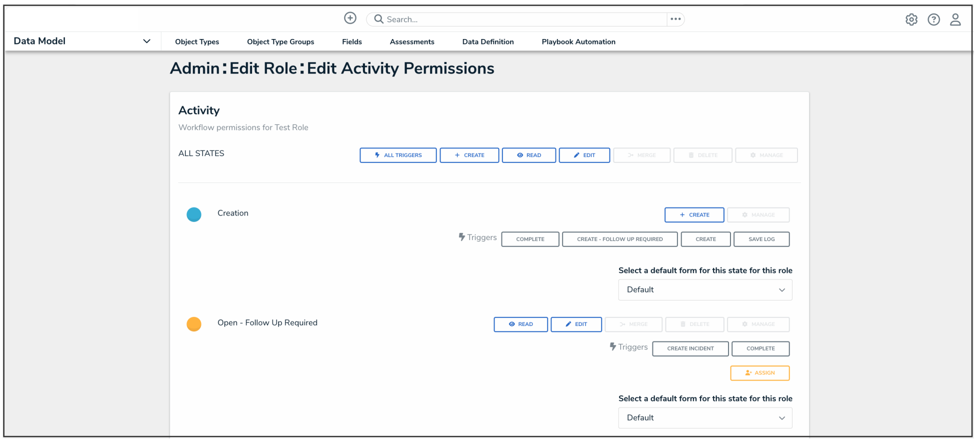
> ***Note:***
> An object type will not be saved to a role until you've configured its workflow permissions.

8. Select the workflow permissions the user will have per each state:

- **All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these permissions for all states in the workflow.
- **All Triggers:** Users can view and click all triggers on a form. The triggers that are visible to user depend on whether the object is in the state associated with the trigger. You can also select each individual trigger to grant access.
- **Create:** Users can create a new object. This permission applies only to the Creation state of the object type.
- **Read:** Users can view the object when it's in the selected state. You cannot select

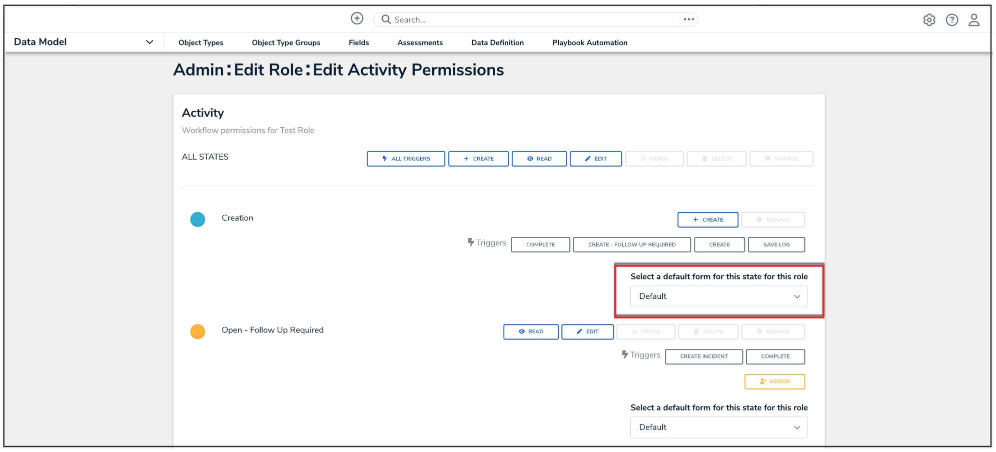
the **Edit**, **Delete**, or **Manage** permissions unless **Read** has been selected.

- **Edit:** Users can edit existing objects in the selected state.
- **Delete:** Users can delete existing objects in the selected state.
- **Manage:** Users can add users from other roles to give them access to the object while it's in the selected state. Note that the added user will not see the object until it's in a state they have permission to view. **Manage** is applicable to explicit permissions only.
- **Assign**: Once the object is in the selected state, users who have been granted permission to view the object through a role will see it in their task list on the My Tasks page. **Assign** is applicable to explicit permissions only.



Edit Permissions Screen

9. From the **Select a default form for this state for this role** dropdown menu, choose the form users will see when using Search, Quick Add, an assessment table, or relationship graph.



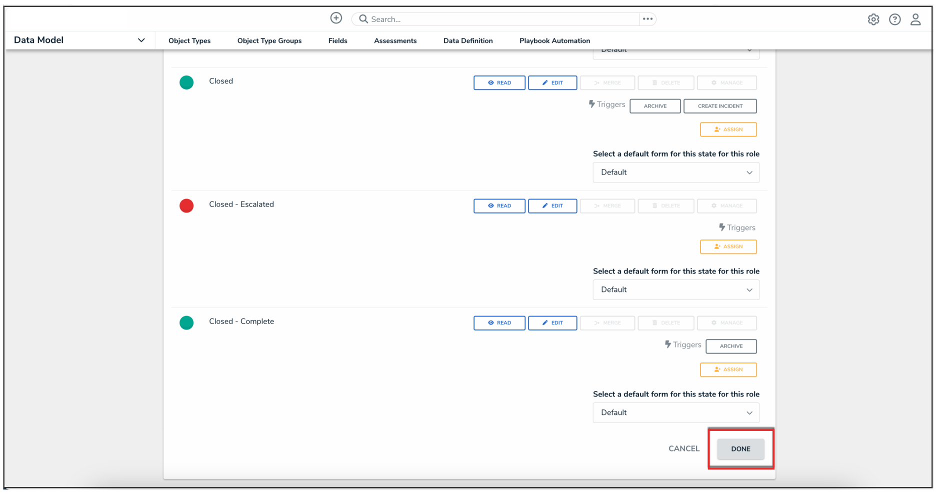
Select a Default Form For This State For This Role Dropdown

- If you **do not** choose a form from this dropdown menu, the object type's default form (the unconfigured list of components added to an object type) will be displayed.
- If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator.

- If you select a configurable form from this dropdown menu, the selected form will be displayed.

> **Note:**
> Forms selected to display on an action, view, data visualization, or relationship table will override any selections made in the **Select a default form for this state for this role** field.

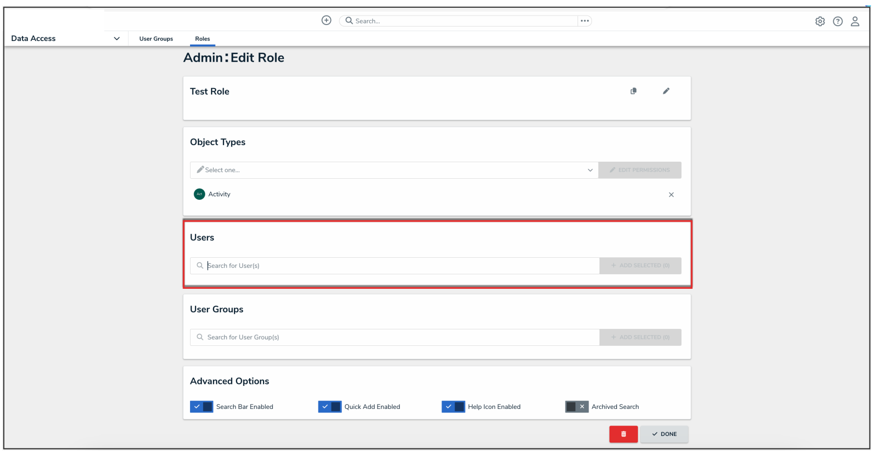
10. Click the **Done** button to save your changes.



Done Button

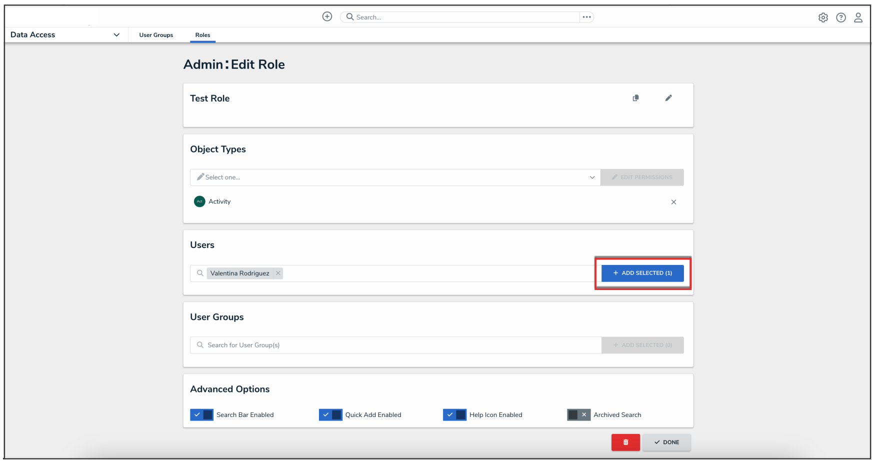
11. Repeat steps 6-10 to continue adding object types as needed.
12. To add individual users to the role:

    a. In the field under **Users**, begin typing the name of the user you want to add to the role in, then press **Enter** on your keyboard or click to select the user.



Users Field

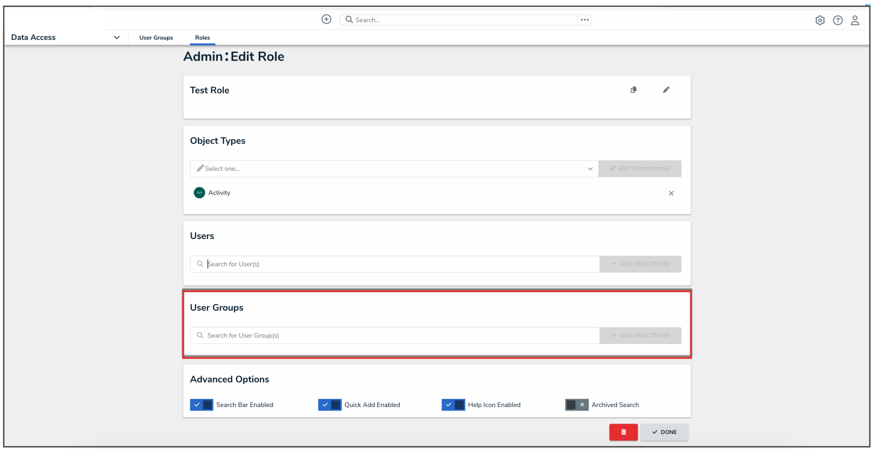
    b. Repeat as needed to add more users, then click the **Add Selected** button.



Add Selected Button

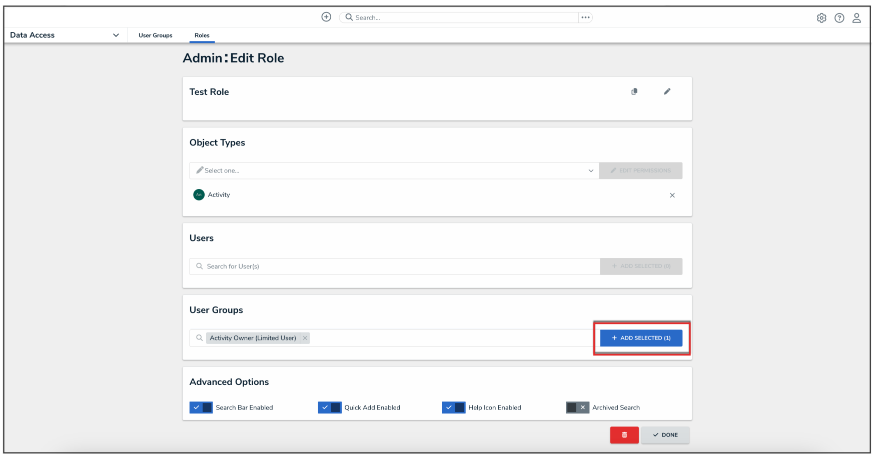
13. To add a user group to the role:

    a. In the field under **User Groups**, begin typing the name of the user group you want to add to the role, then press **Enter** on your keyboard or click to select the user group.



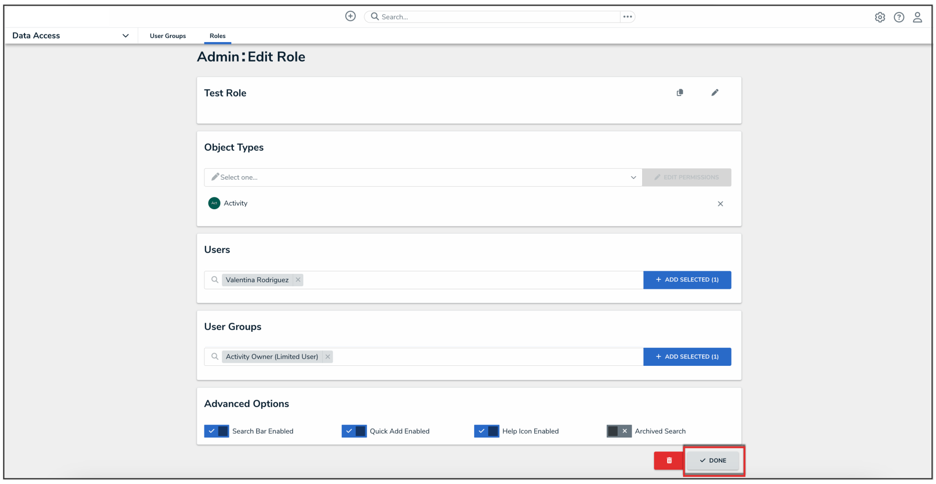
User Groups Field

    b. Repeat as needed to add more user groups, then click the **Add Selected** button.



Add Selected Button

14. **(Optional):** In the **Advanced Options** section, you can select which advanced options to to enable or disable for users within the role. Please refer to the Advanced Options on Roles article for more information.
15. Click the **Done** button to save your changes.



Done Button

Add Roles to an Object Type

Roles control the data a user can create, edit, delete, view, or manage on object types and objects. Once the role component for a specific role is added to an object type, it can be added to a configurable form, where you can grant users from within that role permission to view a specific object. Where necessary, roles allow users to see additional object types related through relationships or references by granting inferred permissions.

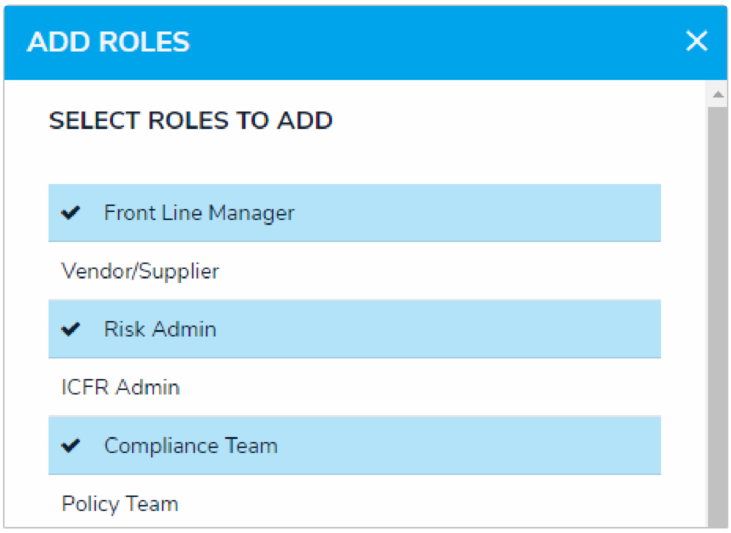
As users with global permissions can automatically view all the objects saved to the object type(s) specified in the role (subject to any workflow permissions), you can only add roles with explicit permissions to an object type.

What the users within a role can do with the object types and objects, including those accessed through inferred permissions, is controlled by the object type’s workflow permissions on their role.

Roles must be created and configured before they can be added to an object type. See the Roles chapter for more information.

To add a role to an object type:

1. Click the icon in the top bar **> Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click the **Roles** tab.
4. Click **Add Role**.
5. Click to select one or more roles under **Select Roles to Add**.

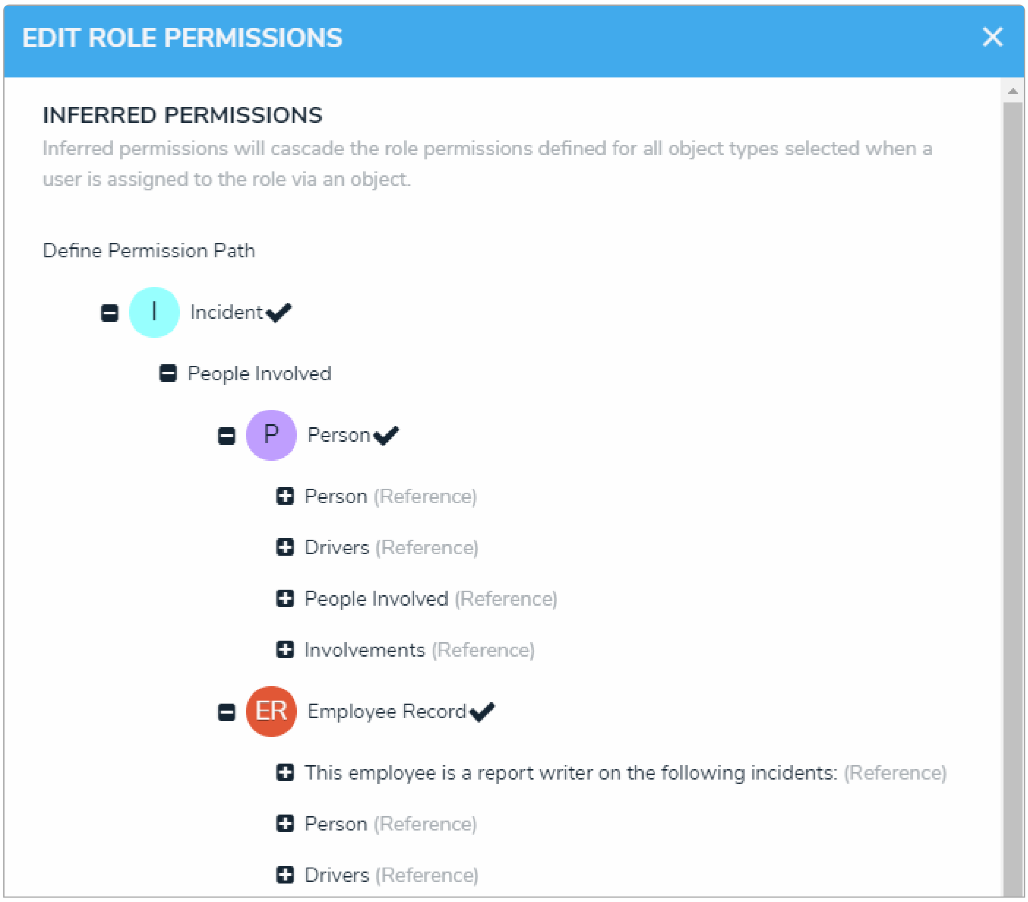


Selecting roles to add to an object type.

6. Click **Add Selected**.
7. To add inferred permissions to the role:

> Granting inferred permissions requires additional configurations on the role. See the Inferred Permissions section for more information on how these permissions work and how to configure the role.

   a. Click the role in the **Roles** tab to open **Edit Role Permissions**.
   b. Click the monogram, which represents the object type you're currently working in, to expand the node and reveal any relationships and references saved to the object type.
   c. Click a relationship or reference to show the object types associated with that relationship or reference (e.g. clicking People Involved will show the People and Employee Record object types).
   d. Click an object type to grant inferred permissions to that object type.



Granting inferred permissions. The checkmarks next to the P (People) and ER (Employee Record) monograms confirm that users in that role have access to those object types through the I (Incident) object type.

  e. Click **Done**, then **Continue** to confirm.

8. To edit the role's inferred permissions, click the role in the tab to open **Edit Role Permissions**.
9. To delete the role **from the object type only**, click the icon.
10. Click **Done** when finished.

Add Roles to an Activity

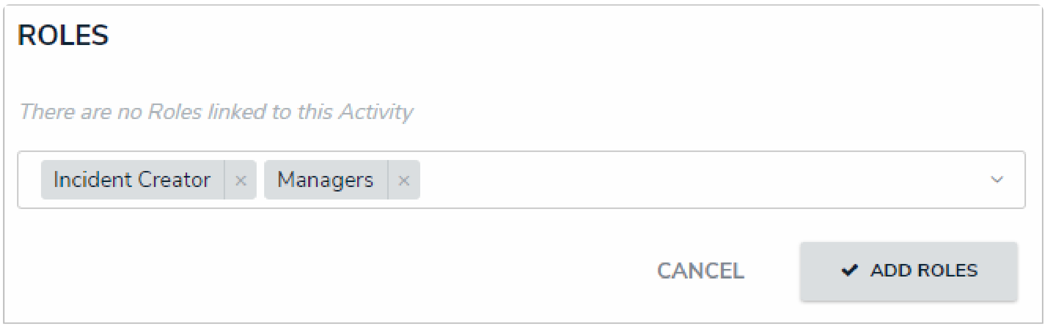
All users, including administrators and those with All Access settings enabled, will not be able to see an application in the left navigation menu until they've been added to one or more activities through a role. Note that adding a role to one activity with an application will not grant access to all its activities. Roles must be added to each activity individually in order to grant access.

Roles are saved to activities within an application. See the Create an Application & Activity section for more information on creating applications and activities.

> If you've recently added your role to an activity, you will need to log out then log back in before the application and/or activity will be displayed in the left navigation menu.

To add roles to an activity:

1. If needed, open the activity you wish to add the role to by clicking the icon in the top bar **> Applications** in the **Application Management** section, then clicking the application and activity to show the **Edit Activity** page.
2. Click **Add Roles** in the **Roles** section.
3. Select one or more roles from the dropdown menu.



Roles selected, but not yet added to an activity.

4. Click **Add Roles**.

To remove a role from the activity, click the trash can icon next to the role, then click **Yes** to confirm.

Add a Clear Fields, Roles or Relationships Action to a Transition

The **Clear Fields**, **Clear Roles**, and **Clear Relationships** actions clear the values from selected fields, roles, or relationships on a form (excluding formulas). These features are particularly helpful to users who are working with existing assessments because they avoid the need to go into the assessment and manually remove data that's no longer applicable.

For example, the **Clear Fields** or **Clear Relationships** actions could be used when a user is relaunching an assessment, while the **Clear Roles** may be used when assigning an object type or assessment to a new user in a different role.

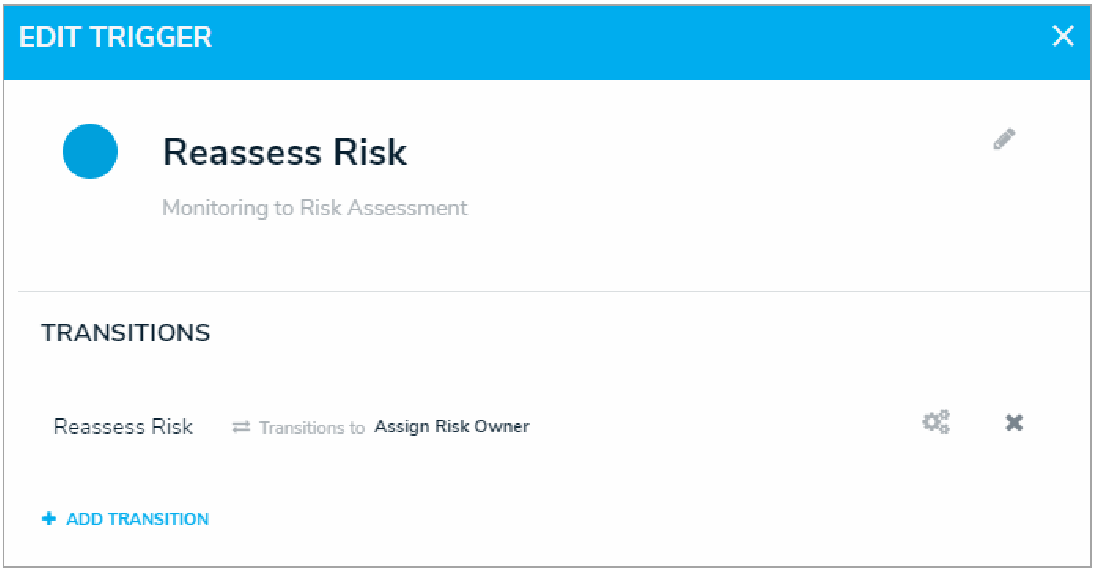
Before you can create these actions on a workflow state, the fields, roles, and relationships must be added to the object type as components and a transition must be created. See Add a Trigger & Transition to a State article for instructions.

Because the **Clear Roles** action takes precedence over the **Role Management** action, avoid adding both these actions to the same transition, as the **Clear Roles** action will clear all roles, including any specified in the **Role Management** action, from the form.

To add a Clear Fields, Clear Roles, or Clear Relationships action to a transition:

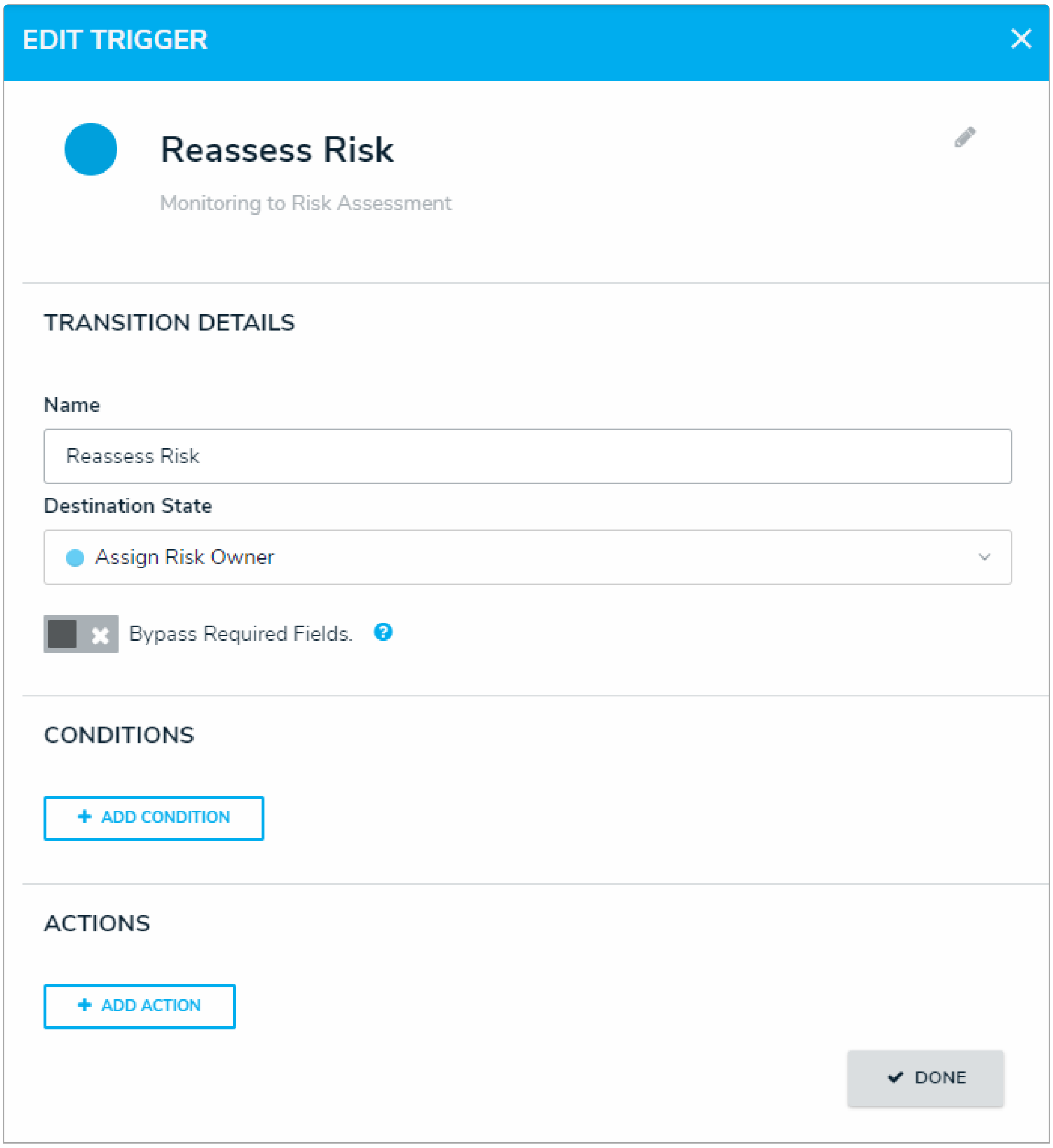
1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the icon next to the transition.

Resolver.
A KROLL BUSINESS



A transition on the Edit Trigger palette.

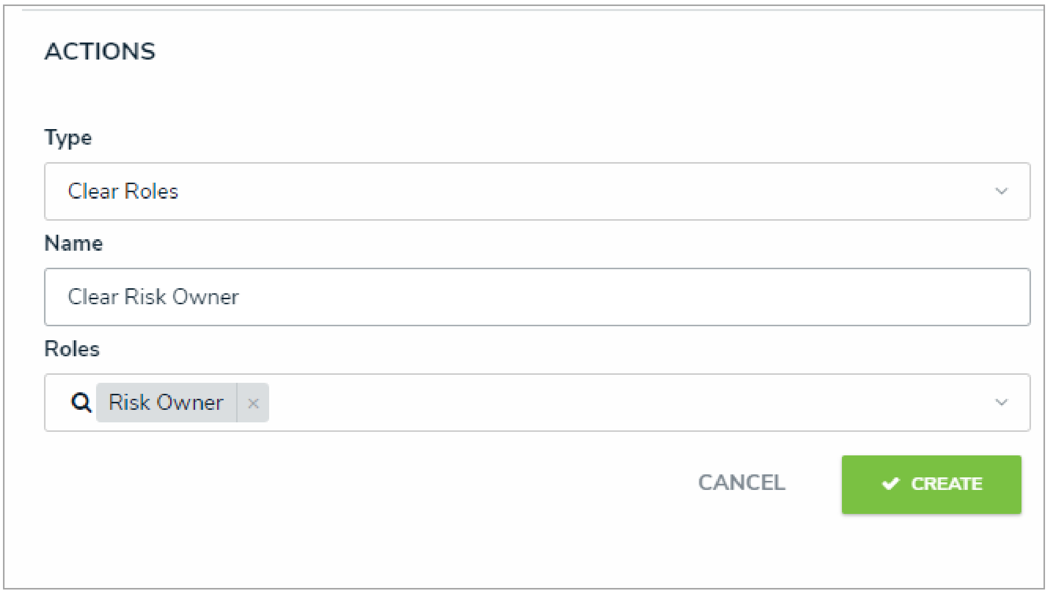
3. Click **Add Action** in the **Actions** section.



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

4. Select **Clear Fields**, **Clear Roles** or **Clear Relationships** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Depending on your selection in step 4 above, make the following selection in the dropdown menu:

In the Type dropdown menu, if you selected	Then
Clear Fields	• Select the fields you wish to clear data from (once the object transitions) from the **Fields** dropdown menu.
Clear Roles	• Select the roles field you wish to clear data from (once the object transitions) from the **Roles** dropdown menu.
Clear Relationships	• Select the relationship fields you wish to clear data from (once the object transitions) in the **Relationships** dropdown menu.



7. Click **Create**.

Edit or Delete a Role

Overview

Roles control the data that users can create, edit, delete, view, or manage in Resolver. Administrators can edit or delete roles from Resolver.

> ***Note:***
> If a user is in multiple roles and the permissions are in conflict, the role with the higher level of permissions will take precedence.

User Account Requirements

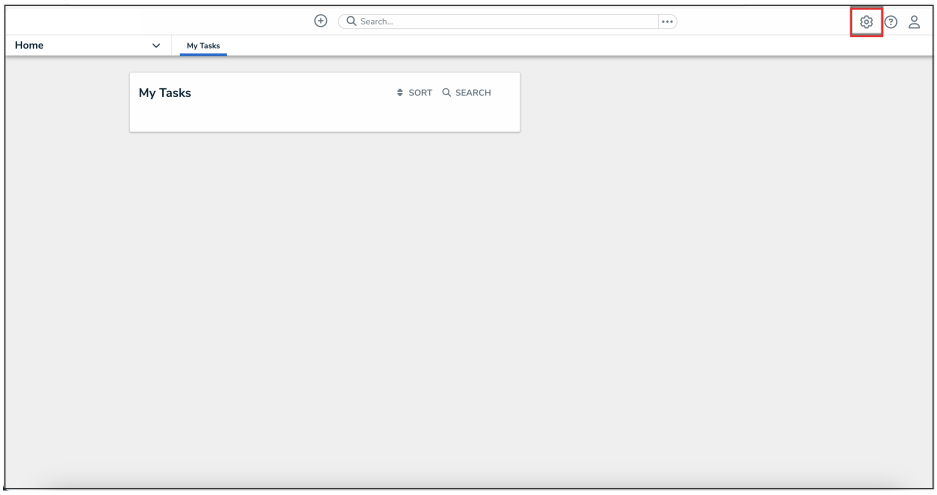
The user account used to log into Resolver must have Administrator permission to access the **Data Access** section.

Related Information/Setup

Please refer to the Roles Overview and the Create a New Role articles for more information on using roles in Resolver.

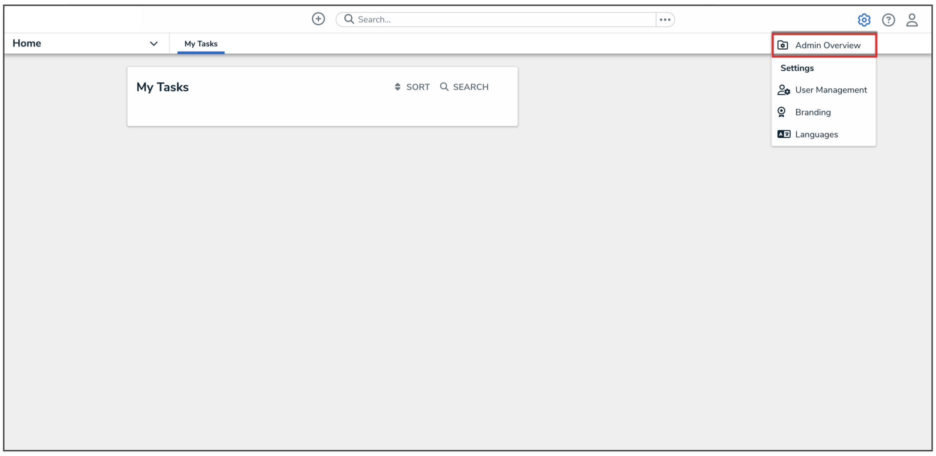
Navigation

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



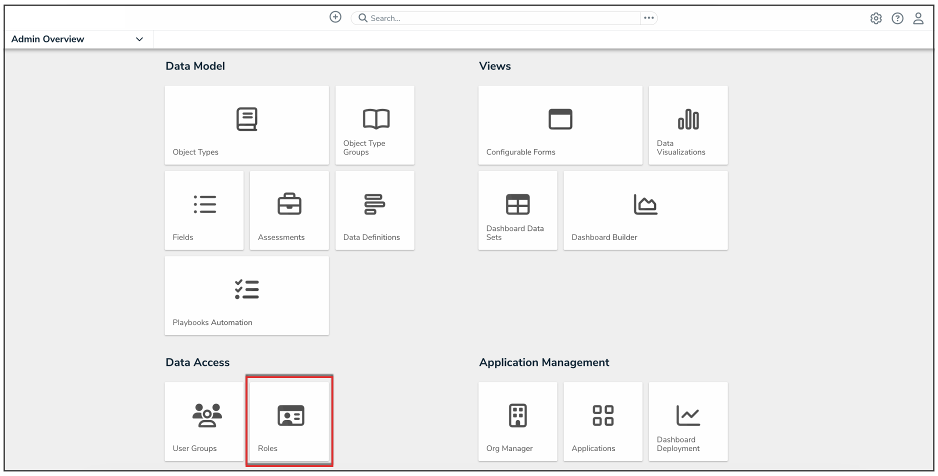
Administration Icon

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



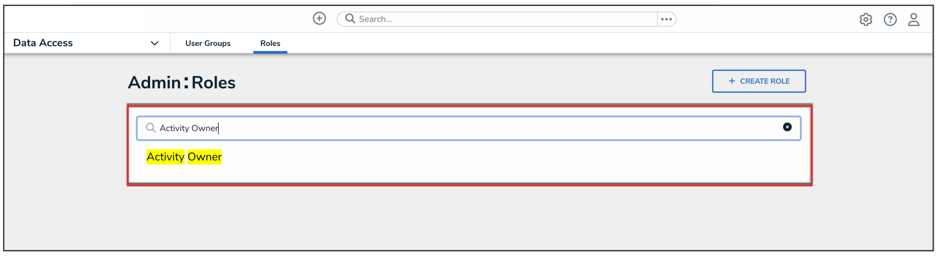
Administrator Settings Menu

3. From the ***Admin Overview*** screen, click the **Roles** tile under the **Data Access** section.



Roles Tile

4. From the ***Roles*** screen, enter a keyword in the **Search** field to narrow the search results.



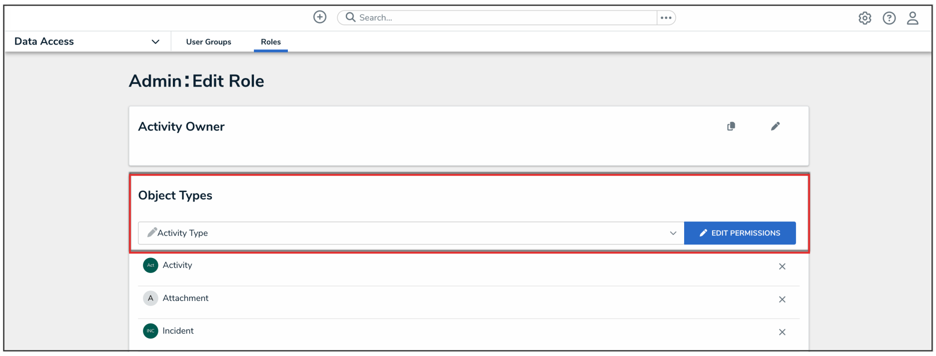
Search Field

5. Click the role that you want to edit or delete.

Editing a Role

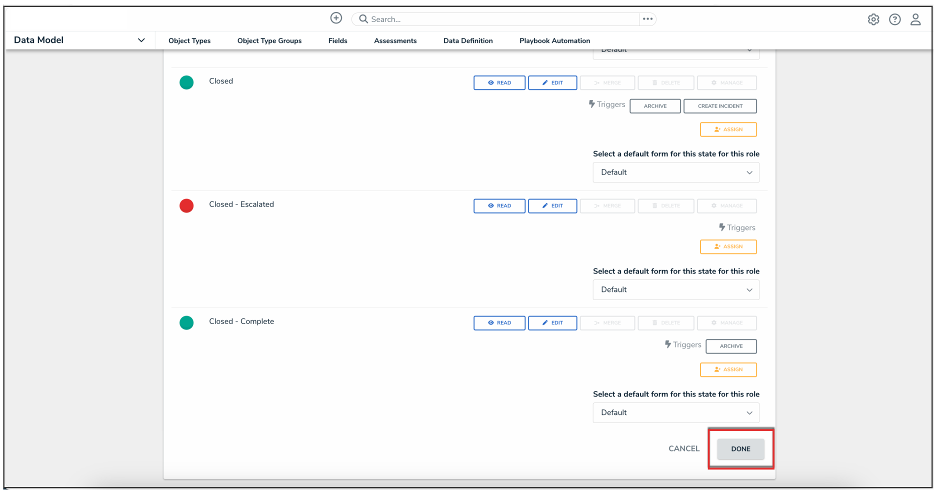
1. From the ***Edit Role*** screen, you can add more object types to the role. Select the object types from the dropdown menu in the **Object Types** section, then click the **Edit**

Permissions button to edit the object type's permissions. For more information on configuring permissions, please refer to the Workflow Permissions article.



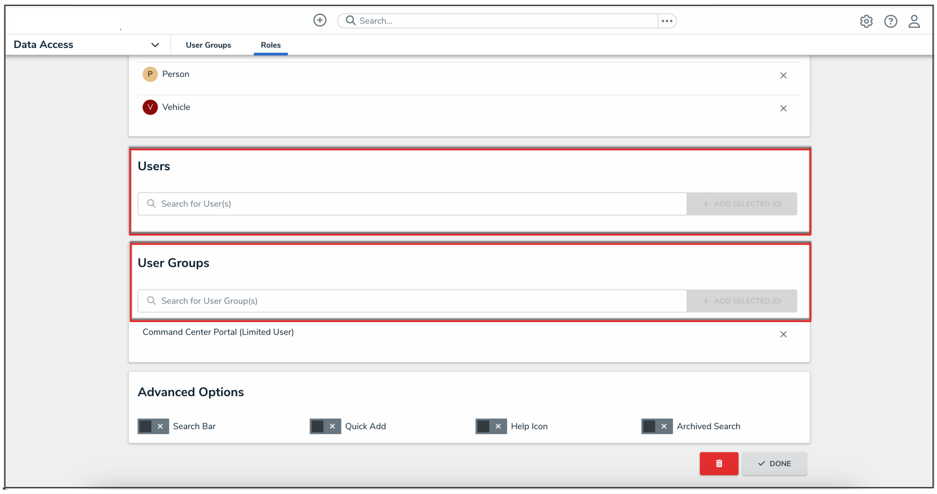
Object Types Section

2. To edit an existing object type’s permissions, click the object type in the **Object Types** section, make your changes as needed, then click the **Done** button to return to the ***Edit Role*** page.

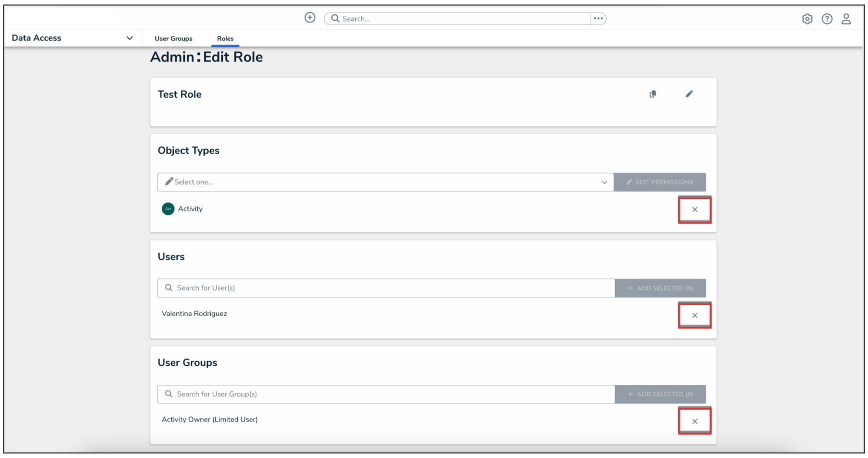


Done Button

3. To add more users or groups to the role, select them from the dropdown menus in the **Users** and **User Groups** section.

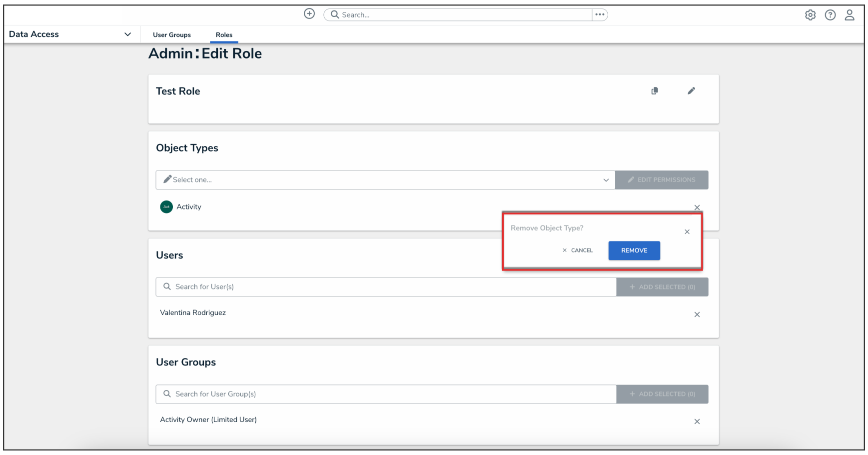


4. From the ***Edit Role*** screen, you can delete an object type, user, or user group from the role:
   - To delete an object type, user, or user group from the role, click the **Remove** icon next to the object type, user, or user group you want to delete.



Remove Icon

   - From the **Remove** pop-up, click the **Remove** button.



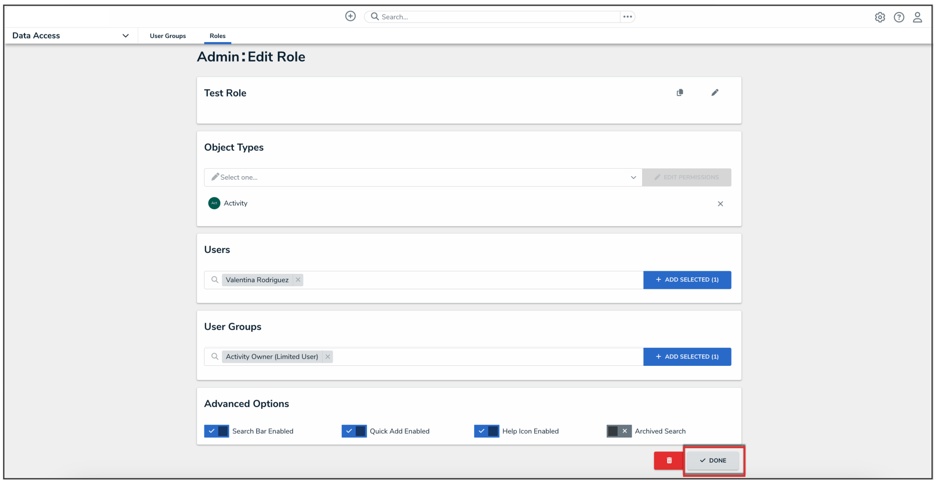
Remove Button

> ***Warning:***
> Roles determine a user's eligibility to access objects only. Removing a user from a role with explicit permissions after they've been granted direct access to an object does **not** automatically revoke their access to that object. Another user with the appropriate permissions must revoke access by removing the user from the role field on the object's form.

5. **(Optional):** In the **Advanced Options** section, you can select which advanced options to to enable or disable for users within the role. Please refer to the Advanced Options on

Roles article for more information.

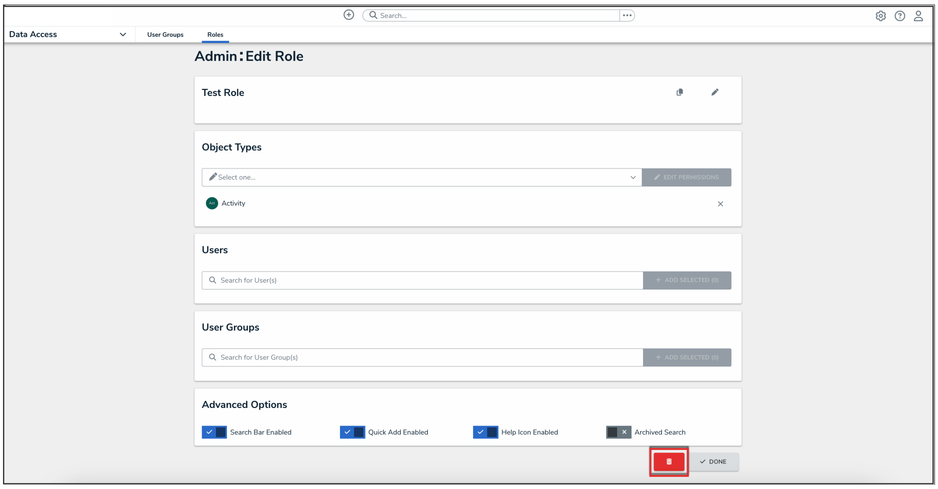
6. Click the **Done** button to save your changes.



Done Button

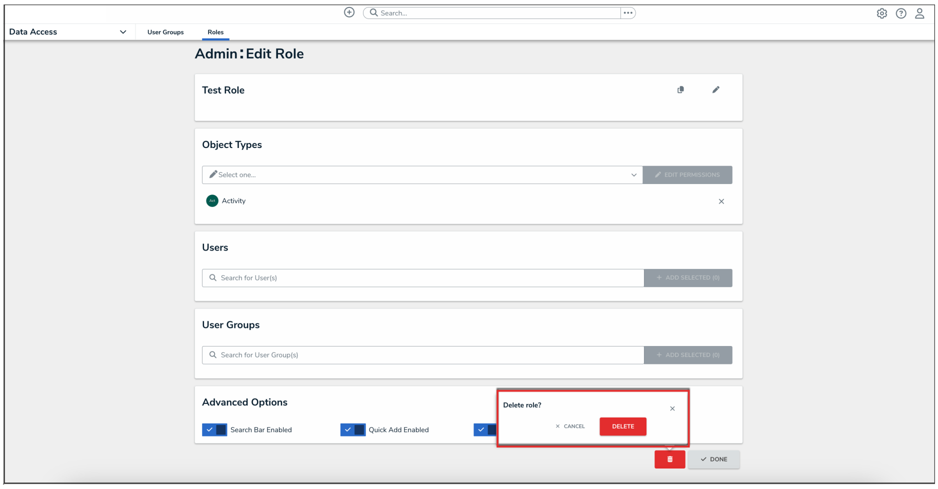
Deleting a Role

1. From the ***Edit Role*** screen, you can delete a role. Click the **Delete** icon to delete the role.



Delete Icon

2. From the **Delete role?** pop-up, click the **Delete** button.



Delete Button