

Users & User Groups

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Create a New User

Overview

Every individual you want to access your Resolver environment requires a User Account. A user with Administration privileges can add User Accounts to Resolver. When a User Account is created, an Administrator must assign each User to User Groups for the User to access the Resolver environment. Only Administrators can add users to the system.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to edit the User Profile.

Related Information/Setup

For more information regarding Administrative User privileges, please see the Administrator Overview article.

• Administrator Overview

For more information on adding a User to a User Group, please see the Adding a User to a User Group article.

• Adding a User to a User Group

For more information on using an alternate language setting, please see the Languages Overview article.

Languages Overview

For Orgs that have Data Warehouse enabled, please see the Access Your Data Warehouse Settings article.

Access Your Data Warehouse Settings

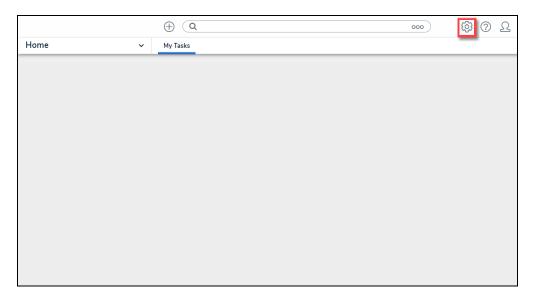
For password requirements, please see the Password Requirements article.

• Password Requirements

Navigation

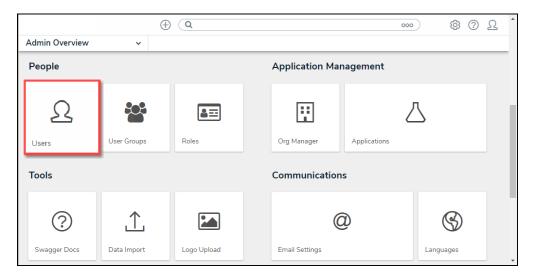


1. From the *Home* screen, click on the **Administration** icon.



Administration Icon

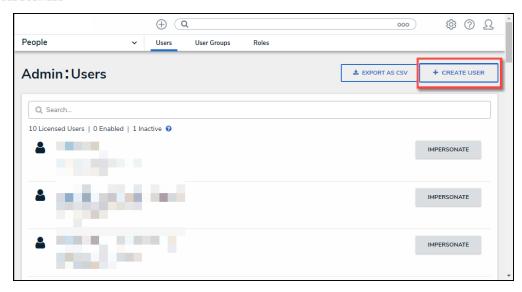
2. From the *Admin Overview* screen, click on the **Users** tile under the **People** section.



Users Tile

3. From the *Admin Users* screen, click the + Create User button.

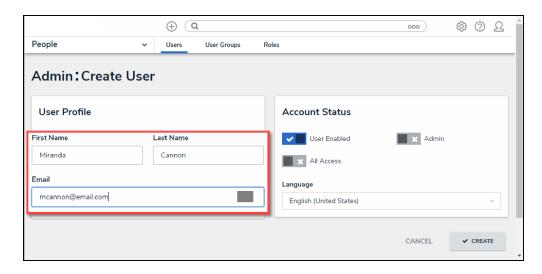




+ Create User Button

Creating a New User

- From the *Admin Create User* screen, enter the user's name in the **First Name** and **Last Name** fields.
- 2. Enter the user's email address in the **Email** field. The email address is used to:
 - Receive the Resolver sign-up email containing instructions on creating a new password and signing into Resolver.
 - Authenticate the user when logging into Resolver.



Create User Screen

- 3. **(Optional)** The following toggle switches are options settings and can give users absolute access or visibility in the system:
 - **User Enabled:** Click the **User Enabled** toggle switch to deactivate the user account. By default, the user account is enabled.

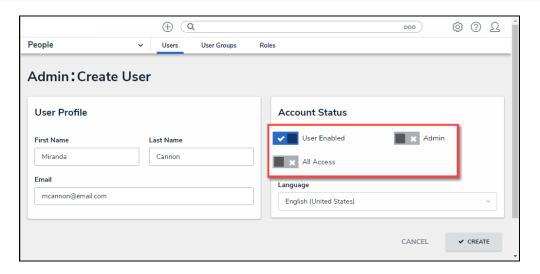


- **Admin:** The Admin toggle switch gives users Administrative privileges with the potential to cause irreparable system damage.
- All Access: The All Access toggle switch allows Users to view, edit, and delete Objects and Object Types. The All Access toggle switch overrides Object Type Workflow permissions.



Warning:

Resolver recommends not enabling the **Admin** or **All Access** toggle switches on for new user accounts.



Optional Toggle Switches

- 4. **(Optional)** Select a language from the **Language** field dropdown menu to change the system's language setting. Before you can set an alternate language setting, an Administrator needs to download a Languages .csv file from the system, map language translations to the user interface text, and upload the .csv file for use within Resolver.
- 5. Click the **Create** button to create the new user account.

Create a New User Group

Overview

An Administrator can add new User Groups to the system. A **User Group** organizes system users into specific groups based on their organizational role (e.g., Employee, Management, etc.). Adding users to a User Group allows an Administrator to assign multiple users within a User Group to a Role by assigning the User Group to a Role instead of manually assign a Role to each user.

User Account Requirements



The user account you use to log into Resolver must have Administrator permission to access the **Admin Overview** screen.

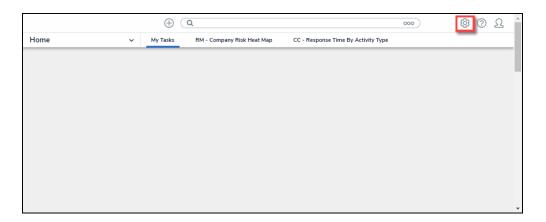
Related Information/Setup

Please follow the link below for more information regarding User Groups.

• User Group Overview

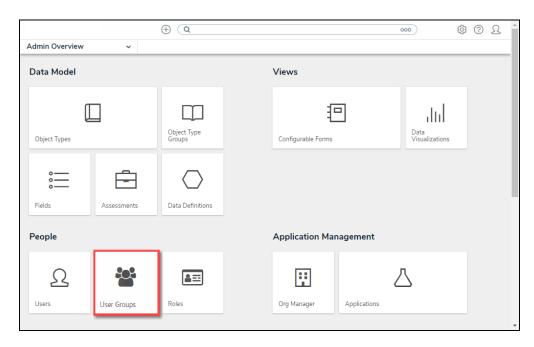
Navigation

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



Administration Icon

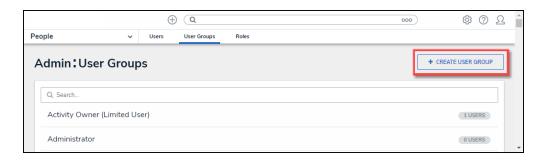
2. From the *Admin Overview* screen, click the **User Groups** tile under the *People* section.



User Groups Tile



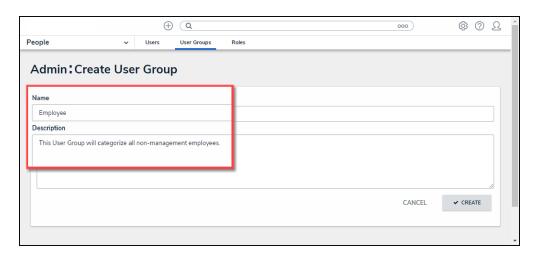
3. From the *Admin: User Groups* screen, click the +Create User Group button.



+Create User Group Button

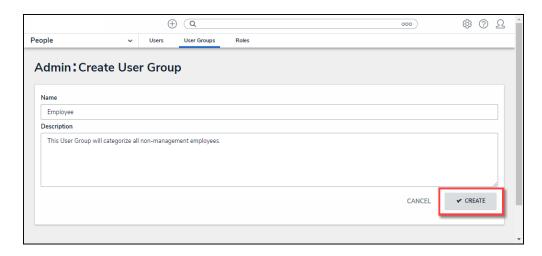
Creating a User Group

- 1. From the Admin: Create User Group screen, enter a User Group name in the Name field.
- 2. (Optional) Enter a brief description outlining the User Group in the Description field.



Admin: Create User Group Screen

3. Click the **Create** Button to add the new User Group to the system.



Create Button



Create an Confidential Login

Overview

An Administrator must create a Confidential Portal Login before you can allow external and occasional stakeholders access to the **Confidential Portal**.

An Administrator must create a non-administrative user account for the login, and assign it to a role with access to the appropriate object type(s) and activity before they can create the Confidential Portal Login.

User Account Requirements

The user account you use to log into Resolver must have Administrator permissions.

Required Information/Setup

For more information on Confidential Portal Submissions, please refer to the Confidential Portal Submissions article.

Confidential Portal Submissions

To Edit or Delete a Confidential Portal login, please refer to the Edit or Delete a Confidential Login article.

• Edit or Delete a Confidential Login

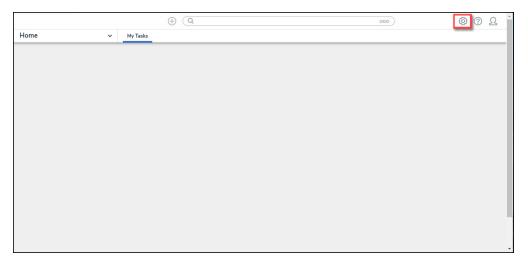
An Administrator must create a non-administrative login for use with the Confidential login, please refer to the Create a New User article.

• Create a New User

Navigation

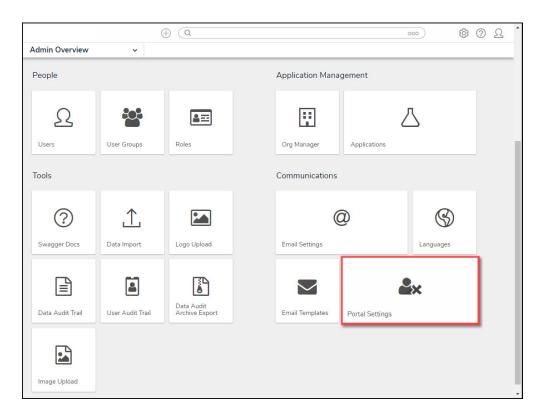
1. From the *Home* screen, click on the **System** icon.





System Icon

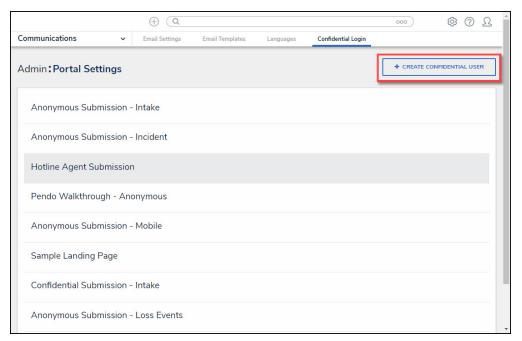
From the *Admin Overview* screen, click the **Portal Settings** tile on the *Communications* section.



Portal Settings Tile

3. From the $\it Portal \ Settings$ screen, click the + $\it Create \ Confidential \ User$ button.



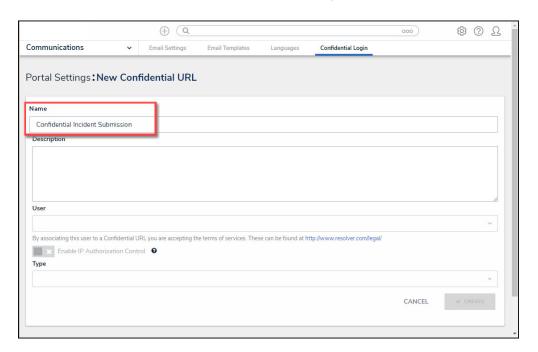


+ Create Confidential User Button

Create a Confidential Login

An Administrator must create a non-administrative user account for the login, and assign it to a role with access to the appropriate object type(s) and activity before they can create the Confidential Portal Login. For more information, please refer to the Create a New User article.

1. From the New Confidential URL screen, enter a login name in the Name field.

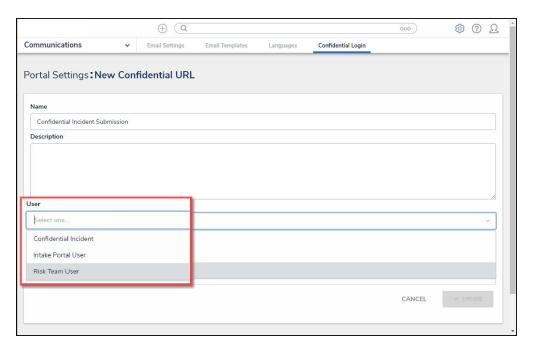


Name Field

2. **(Optional)** Enter a login description in the **Description** field. This description will appear below the login's name on the **Confidential Login** screen.



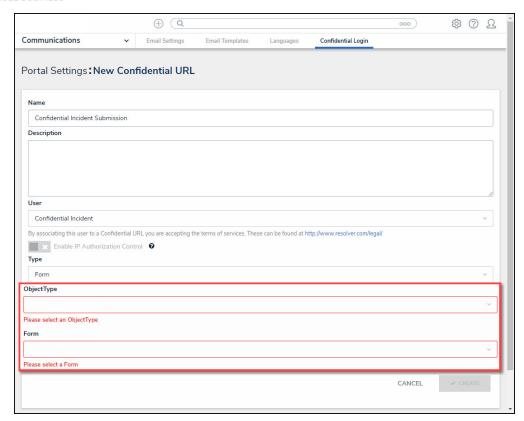
3. Select a non-administrative account from the **User** dropdown menu.



User Dropdown Menu

- 4. **(Optional)** Click the Enable IP Authorization Control toggle switch to restrict who can access this URL (based on the entries in the IP allow list). The toggle switch will be greyed out if IP authorization control is not enabled for the Org. For more information, please refer to the IP Authorization Control article.
- 5. Select one of the following **Type** options from the dropdown menu:
 - Form: The Form type displays a configurable form only.
 - Object Type: Select an Object Type from the Object Type dropdown list. The
 Object Type dictates which Forms will be available to select on the Forms
 dropdown menu.
 - Form: Select a Form from the Form dropdown menu. The Form selected will appear when access the Confidential Portal.

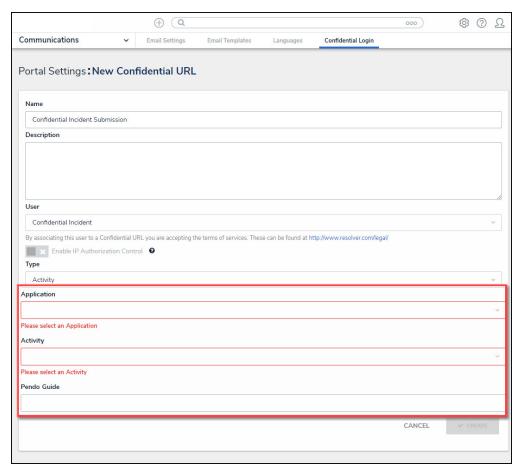




Form Additional Fields

- Activity: The Activity type displays the actions and views within an activity.
 - Application: Select an Application (e.g., IT Risk Management) from the Application dropdown list. The Application dictates which Activities will be available to select on the Activity dropdown menu.
 - Activity: Select a Activity from the Activity dropdown menu. An Activity is the
 part of an application where users can create, edit, and view data. The Activity
 selected will appear when access the Confidential Portal.
 - (Optional) Pendo[®] Guide:

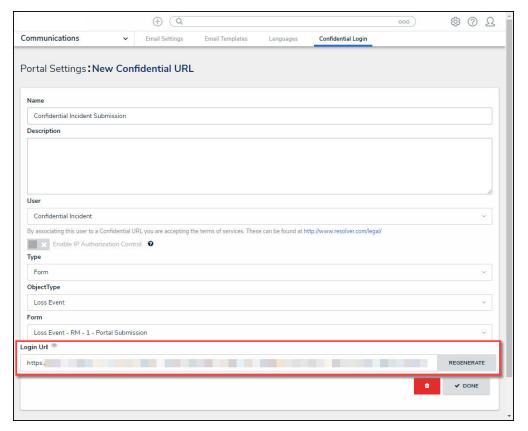




Activity Addition Fields

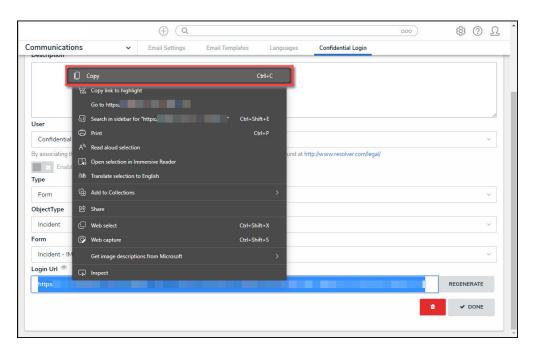
Click the Create button to save your changes, the New Confidential URL screen will refresh
and the system will generate the confidential Login URL. The Login URL field is a readonly field.





Login URL Field

- 7. **(Optional)** Click the **Regenerate** button to create a new Login URL if you have edited any of the field on the **New Confidential UR**L screen, or for security reasons.
- 8. Using your cursor, highlight the **Login URL** and press the **Right** mouse button to select the **Copy** option from the **Context Menu**.



Context Menu



9. Paste the Login URL in an email or document to send to a Submitter.

Impersonate Another User

With the **Impersonation** feature, administrators can temporarily assume the account of another user to work with objects according to that user's role and permissions. This feature is useful when admins need to test the user's permission levels or to complete a task for users who may otherwise be unable to do so themselves. Administrators can impersonate other administrators, but they are unable to perform administrative tasks while doing so.

Impersonation Mode can also be used to identify and fix any standard form conflicts for users in multiple roles. See the Form Conflicts section for more information.



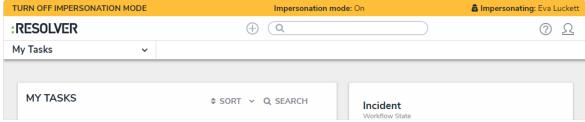
If IP authorization control is enabled on your org, your IP address will be validated against the IP allow list when activating **Impersonation Mode** and when disabling it. If your IP address cannot be validated, you'll be logged out. See the IP Authorization Control section for more details.



Any changes made while impersonating another user are captured in the User Audit Trail.

To impersonate another user:

- 1. Click the 👸 icon in the top bar > **Users** in the **People** section.
- Click the Impersonate button next to the user you wish to impersonate. While in
 Impersonation Mode, the name of the user you're impersonating will appear in a yellow
 banner at the top of the page.



Active Impersonation Mode.

To deactivate Impersonation Mode, click **Turn Off Impersonation Mode** to the left of the banner.

Edit or Delete a User

Overview

An Administrator can edit a User Profile by changing the User's first name, last name, or email address.



User Account Requirements

The user account you use to log into Resolver must have Administrator permission to edit the User Profile.

Related Information/Setup

Please see the Languages Overview article for more information on using an alternate language setting.

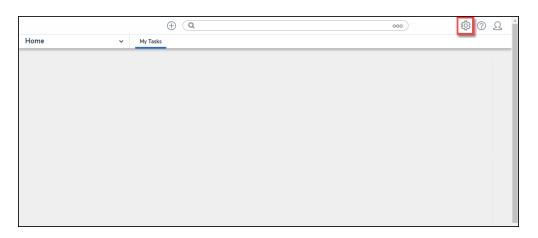
• Languages Overview

Please see the Access Your Data Warehouse Settings article for Orgs that have Data Warehouse enabled.

Access Your Data Warehouse Settings

Navigation

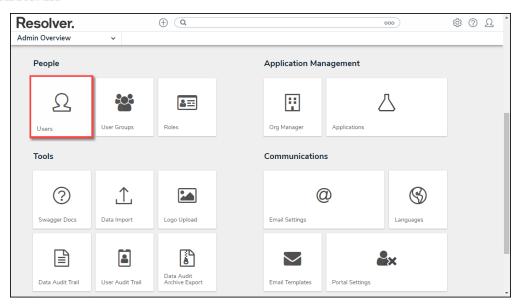
1. From the *Home* screen, click the **Administration** Icon.



Administration Icon

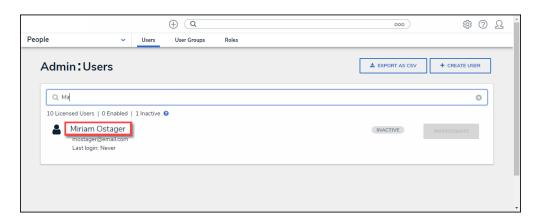
2. From the *Admin Overview* screen, click the **Users** tile under the **People** section.





Users Tile

- 3. Enter a **User's Name** in the **Search** field to narrow the search results.
- 4. Click a User Name.



User Name Link

Editing or Deleting a User

- From the Admin Edit User screen, an Administrator can edit the following fields and toggle switches:
 - First Name: Click the First Name field to change to the User's first name.
 - Last Name: Click the Last Name field to change to the User's last name.
 - Email Address: Click the Email Address field to change to the User's email address.
 - An Administrator is a member of all the same Orgs as the user. The email address change will take effect immediately.
 - An Administrator is not a member of all the same Orgs as the user. The User is
 moved to a Pending state and must click a **Verification** link for the changes to
 take effect. The Administrator can also **Resend Email Confirmation** or **Cancel**



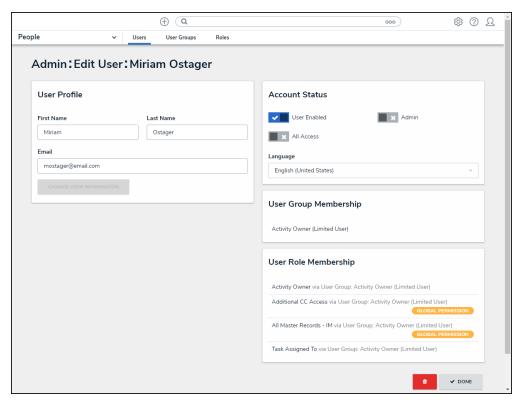
Changes.

- The User is logged in to the system. The User will see a system notification at the top of their screen, indicating Email Updated.
- The User is not logged in to the system. The User will be redirected the next time they log in. The user must log in on the redirected page using their original email address. On successful login, the user will see an Email Updated confirmation message.
- **User Enabled:** Select the **User Enabled** toggle switch the enable (blue) or disable (grey) a User Profile.
- Admin: Select the Admin toggle switch to enable (blue) or disable (grey)
 Administration permissions.
- All Access: Select the All Access toggle switch to enable (blue) or disable (grey) all
 access, granting the User access to all Object Types and Object within an
 Organization.
- Language: Select a Language preference from the dropdown menu to change the system's language setting. Before you can set an alternate language setting, an Administrator needs to download a languages .csv file from the system, map language translations to the user interface text, and upload the .csv file for use within Resolver.

Note:

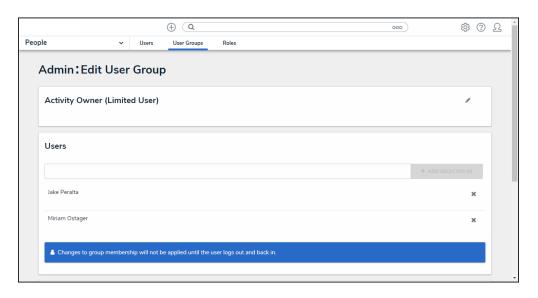
The default language setting in the User's browser will take precedence over Resolver for language translations.





Admin Edit User Screen

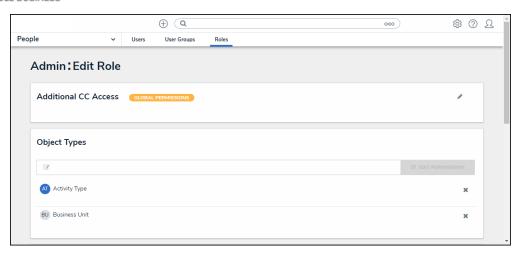
 The *User Group Membership* section shows the User Groups the User is enrolled in. Click on a **User Group** to open the *Admin Edit User Group* screen to view further details, remove, and add a User to the User Group.



Admin Edit User Groups Screen

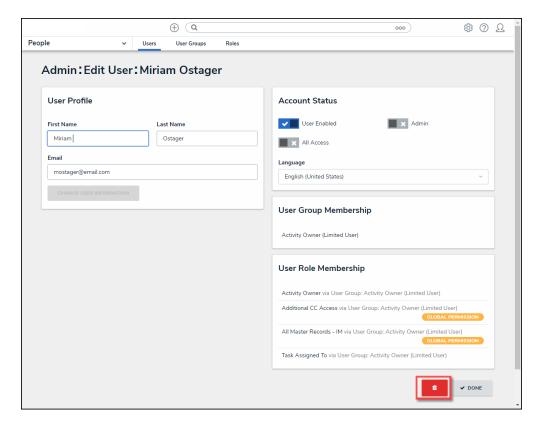
The *User Role Membership* section shows the Roles the User is enrolled in. Click on a
 Role to open the *Admin Edit Role* screen to view further details, remove, and add a User
 to a Role.





Admin Edit Role Screen

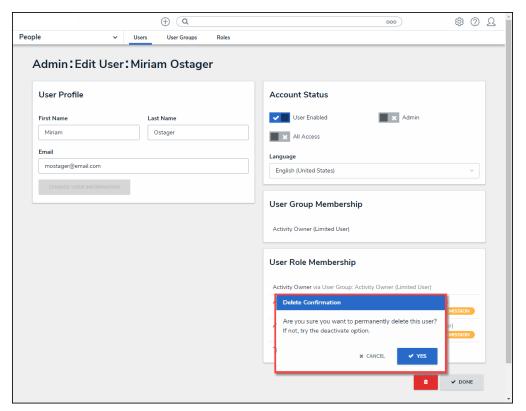
4. Click on the **Delete** button to delete the user profile. Disabling a user account is better than delete them to avoid impacting any existing role and assignment configurations (and their associated workflows). Disabled Users are not counted towards your Org's maximum user count.



Delete Button

- 5. A *Delete Confirmation* screen will appear, asking if you want to delete the User from the system permanently.
- 6. Click the **Yes** button to confirm.





Delete Confirmation Screen

Edit or Delete a User Group

Overview

An Administrator can make changes to a User Group or delete a User Group from the system. A **User Group** organizes system users into specific groups based on their organizational role (e.g., Employee, Management, etc.). Adding users to a User Group allows an Administrator to assign multiple users within a User Group to a Role by assigning the User Group to a Role instead of manually assigning a Role to each user.

If your organization uses LDAP, adding or removing users on a User Group will need to be done from LDAP. If changes are made in Resolver, any changes will revert during the next LDAP sync.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to access the **Admin Overview** screen.

Related Information/Setup

Please follow the link below for more information regarding User Groups.

User Group Overview

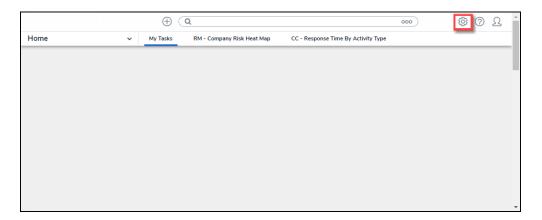


Please follow the link below for more information regarding LPAD.

• Configure & Run the LDAP Sync Tool

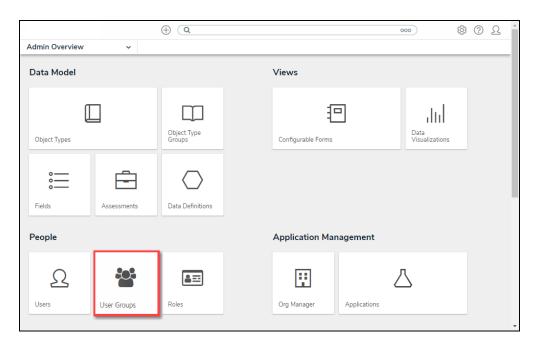
Navigation

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



Administration Icon

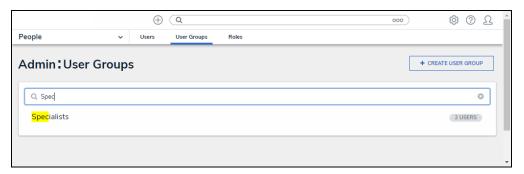
2. From the *Admin Overview* screen, click the **User Groups** tile under the *People* section.



User Groups Tile

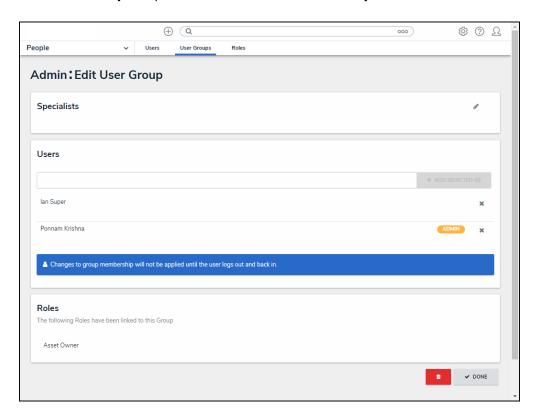
 From the *Admin: User Groups* screen, enter a **User Group Name** or keyword in the Search field or scroll down until you locate the correct User Group.





Search Field

4. Click a **User Group** to open the **Admin: Edit User Group** screen.

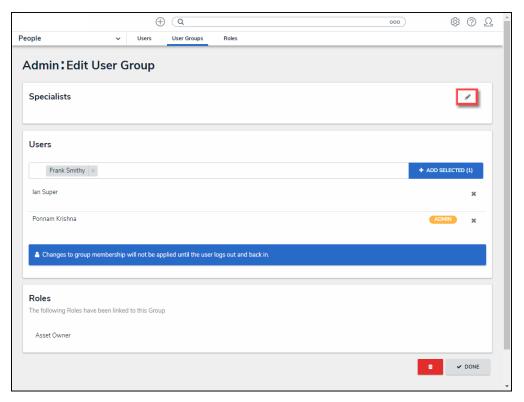


Admin: Edit User Group Screen

Editing a User Group

 From the Admin: Edit User Groups screen, click the Edit icon to edit the User Group's Name and Description fields.





Edit Icon

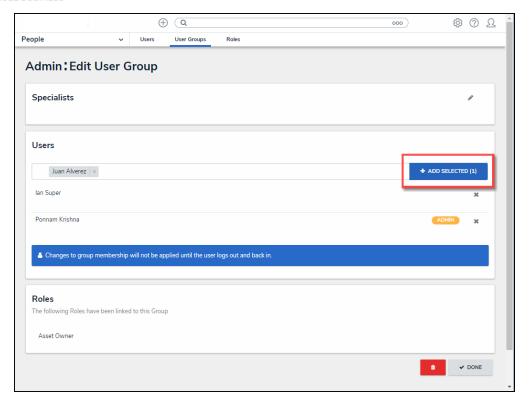
- 2. Enter a User's name in the **Users** field and click the user's name from the drop-down list. Continue adding more users as required.
- 3. Click the **+Add Selected** button to add the selected user to the User Group.



Note:

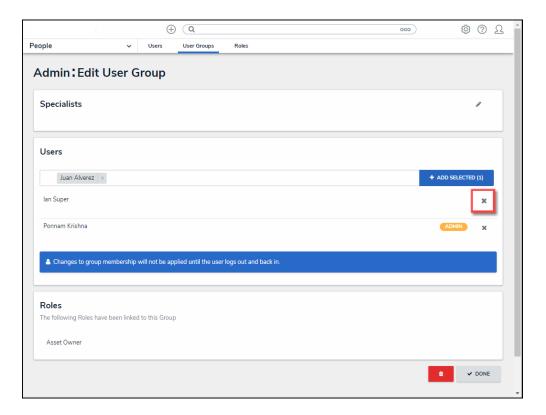
Users who are currently logged in when they are added to a user group will need to log out and then log back in before the changes are applied.





+Add Selected Button

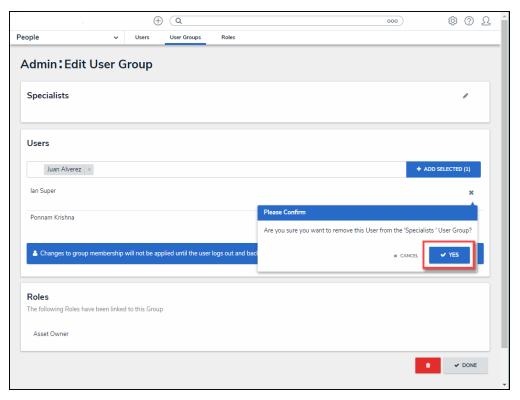
4. Click the **Delete** icon to delete a user from the User Group.



Delete Icon

- 5. A *Confirmation* pop-up will appear.
- 6. Click the **Yes** button to remove the user from the User Group.

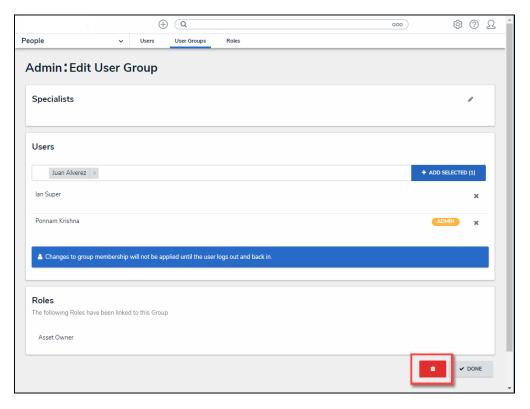




Confirmation Pop-up

Deleting a User Group

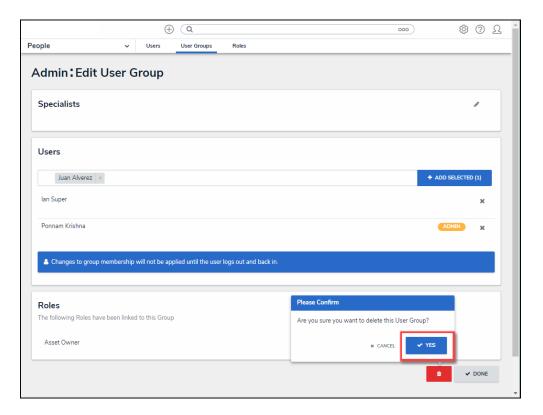
1. From the *Admin: Edit User Group* screen, scroll to the bottom of the screen and select the **Delete** button.



Delete Button



- 2. A *Confirmation* pop-up will appear.
- 3. Click the **Yes** button to delete the User Group from the system.



Yes Button