Users & User Groups

Last Modified on 01/18/2022 9:34 am MST

Create a New User

Every person accessing your Core organization must have his or her own username and password to log in. User accounts are then added to User Groups and Roles, so that you can define which users can view, edit, create, and manage certain elements and objects.

The **Users** settings is also where you can:

- Impersonate other users;
- Enable or disable accounts, administrative rights, or the All Access settings;
- Select which language the user will see in the UI and application if they haven't selected a default language in their browser;
- Review the user groups and roles the user has been added to (once the account is created); and
- Access data warehouse information (if enabled for your organization).

All Access

Enabling the **All Access** settings in a user's profile grants the user access to all object types and their objects in the organization. This means that a user with these settings enabled can view all objects **without** an administrator adding the user to a role, adding one or more object types to the role, then configuring the workflow permissions.

Note that even if a user has been added to a role, any workflow permissions configured for the object types are overridden by the All Access settings. Additionally, should the user need access to an application and its activities, the user must be added to a role, which then must be added to an activity. If the user should be an administrator, you must enable the **Admin** settings in their user profile.

Because **All Access** grants a user access to all objects types and their objects within an organization, it's recommended that you enable these settings only when necessary.

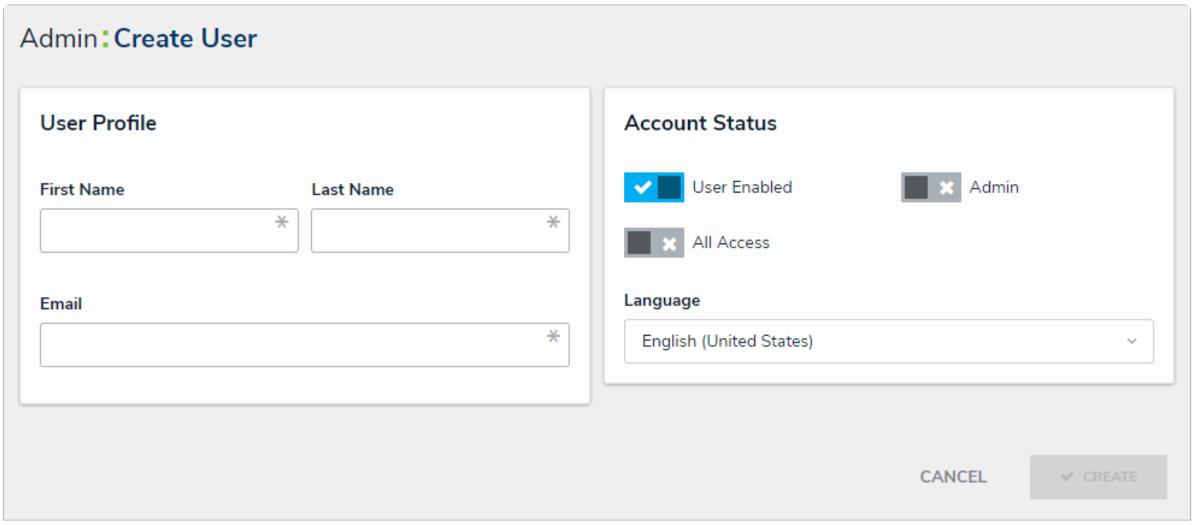
Data Warehouse

If enabled, the **Edit User** page for administrative users contains the **Data Warehouse Settings**. This section provides the information required to connect your data warehouse with business intelligence tools. See the Data Warehouse article for more information.

Instructions

To create a new user:

1. Click the icon in the top bar > **Users** in the **People** section.
2. Click **Create User** to show the **Create User** page.



The Create User page.

3. Enter the user's name in the **First Name** and **Last Name** fields.
4. Enter the user's email address in the **Email** field. This is the address that will receive the email with further instructions on creating a password to sign into Core. This email address is also used to authenticate the user when he or she logs in and therefore must be unique.

> Because the user's email address is used to authenticate the user when he or she logs in, ensure the email address is correct before clicking **Create** as you will be unable to modify the address later.

5. **Optional:** Click the icon next to **User Enabled** to make this user account inactive. By default, the user account is active.
6. **Optional:** Click the icon next to **Admin** to make this user an administrator. By default, administrative rights are disabled.
7. **Optional:** Click the icon next to **All Access** to allow this user to access all the object types and their objects within the organization.

> **All Access** allows grants a user access to all object types and their objects within an organization. Therefore, it's recommended that you enable these settings only when necessary.

8. **Optional:** Select a pre-configured language from the **Language** dropdown menu to choose how the UI and applications will be translated for the user. Note that the default language selected in a user's browser will take precedence. See the Languages section for more information.
9. Click **Create**. The new user will receive an email at the email address entered in step 4 with instructions on creating a password and signing into Core.

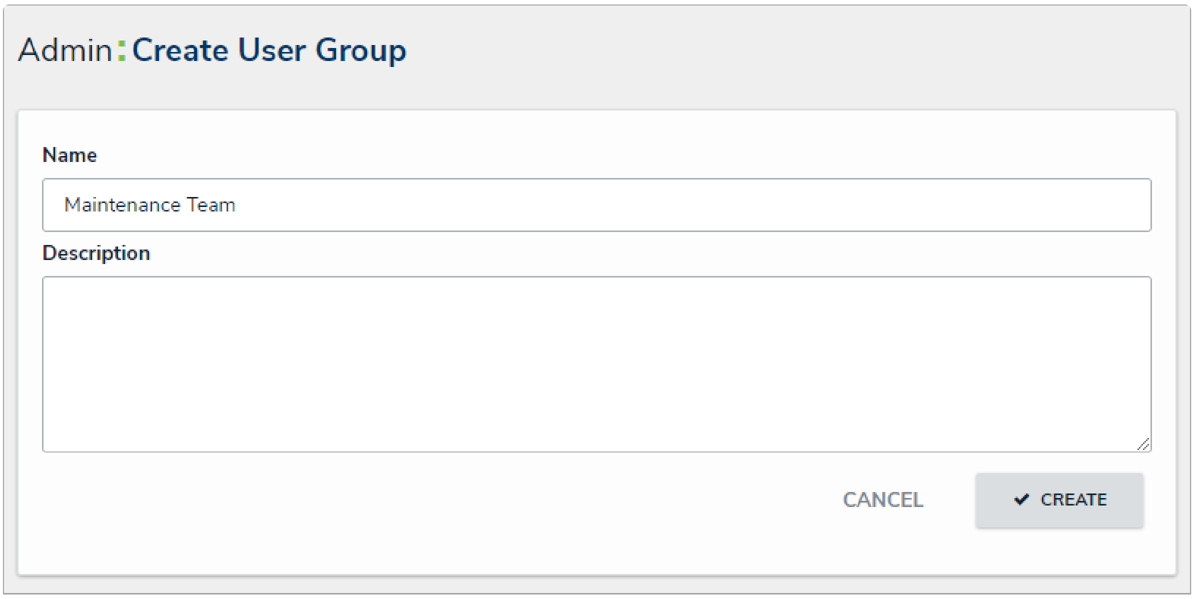
If the email address entered in step 4 belongs to an existing user on another organization, an error message reading "A user with that E-mail already exists, and e-mail must be unique" will be displayed. If you wish to add that user to your organization, click **Link User to Current Org**.

Create a New User Group

If needed, you can review which groups an individual user has been added to from the **User Group Membership** section on the **Edit User** page.

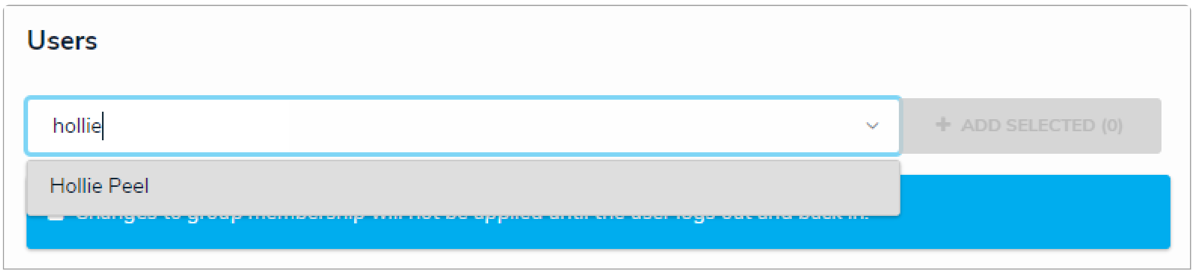
To create a new user group:

1. Click the icon in the top bar > **Users** in the **People** section.
2. Enter the name for the user group in the **Name** field.
3. **Optional:** Enter a description of the user group. This description will appear below the user group's name when viewing it on the **Edit User Group** page.



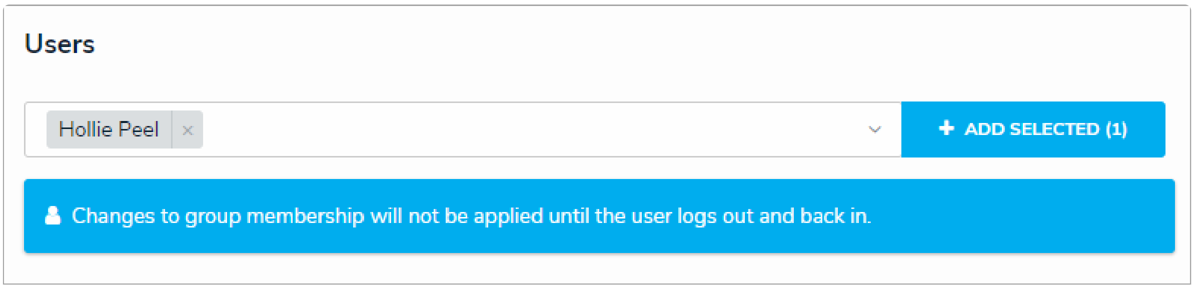
The Create User Group page.

4. Click **Create** to display the **Edit User Group** page.
5. In the field under **Users**, begin typing the name of the user you want to add to the group, then press **Enter** on your keyboard or click the user to select them. Continue adding more users as needed.



Searching for existing users to add to the user group.

6. Click **Add Selected**.



Users to be added to a user group. You must click Add Selected to save your changes.

Users who are logged in at the time they're added to a user group will need to log out then log back in before the changes are applied.

7. Click **Done** when finished.

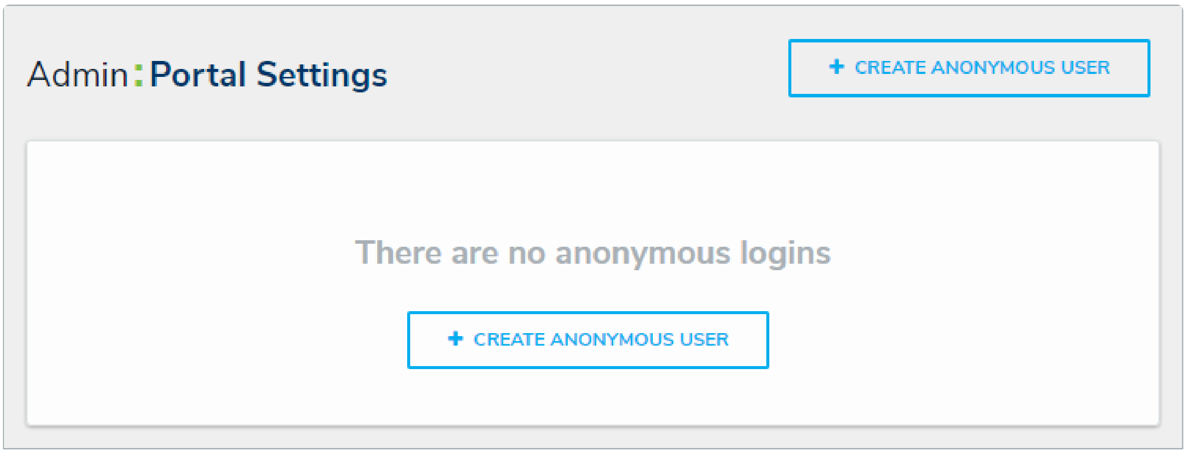
Create an Anonymous Login

To create an anonymous user and login URL:

1. Create a non-administrative user account for the login, then assign it to a role with access to the appropriate object type(s) and activity.

2. Click the icon in the top bar > **Portal Settings** in the **Communications** section.

3. Click **Create Anonymous User**.



The Portal Settings page.

4. Enter a name for the login in the **Name** field.

The Name and Description fields of a new anonymous login.

5. **Optional:** Enter a description of the login in the **Description** field. This description will appear below the login's name on the **Anonymous Login** page.

6. Select the non-administrative account created in step 1 from the **User** dropdown menu.

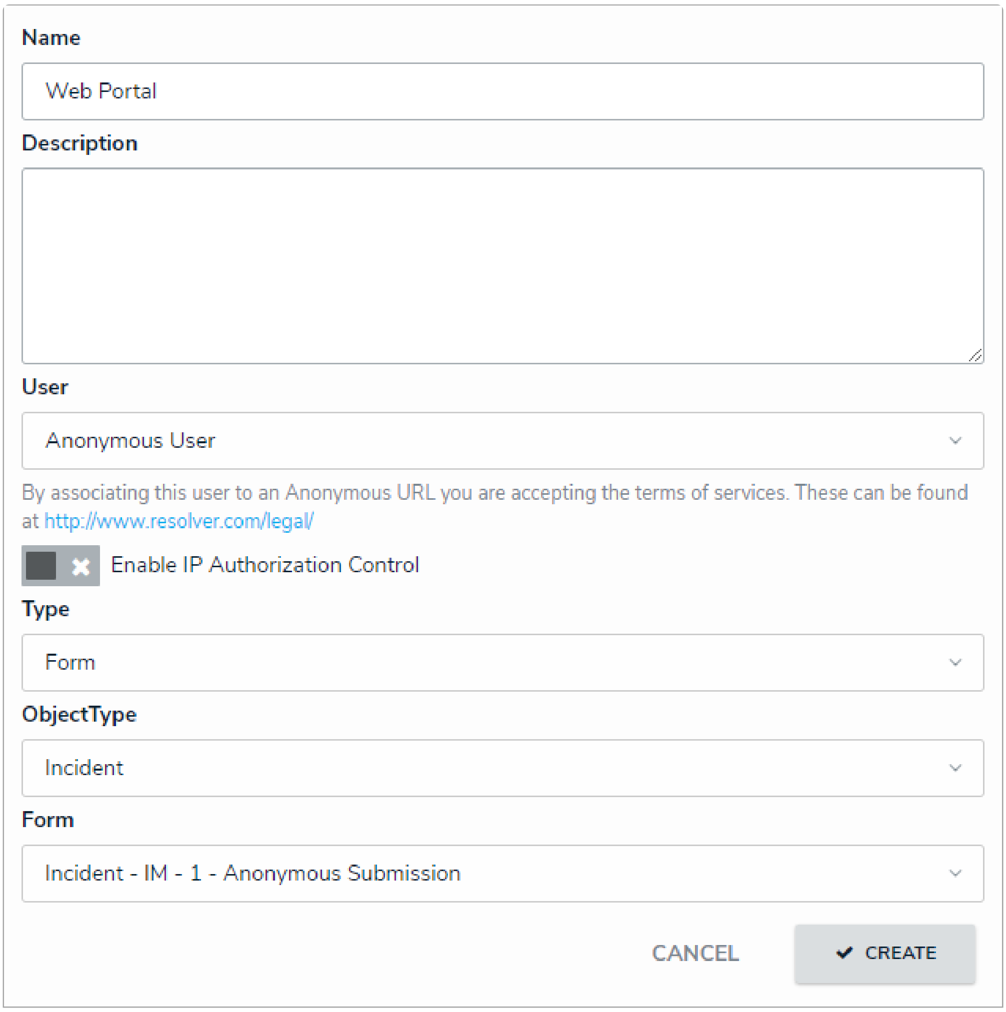
7. **Optional:** Click the icon beside **Enable IP Authorization Control** to restrict who can access this URL based on the entries in the IP allow list. This option will be greyed out if IP authorization control is not enabled for the org. See the IP Authorization Control section for more information.

8. Select either **Form** (to display a configurable form only) or **Activity** (to display the actions and views within an activity) from the **Type** dropdown menu:

   - If you selected **Form**:

     a. Select an object type from the **Object Type** dropdown menu.

     b. Select a configurable form from the **Form** dropdown menu.



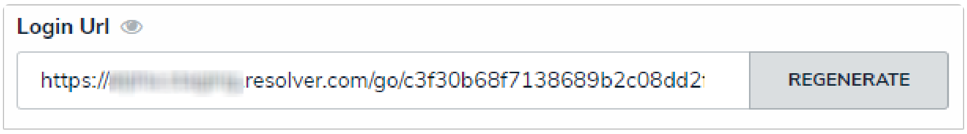
A new anonymous login URL.

- If you selected **Activity**:

    a. Select an application from the **Application** dropdown menu.

    b. Select an activity from the **Activity** dropdown menu.

9. Click **Create** to save your changes and generate the anonymous login link in the **Login Url** field.



The Login URL displaying the anonymous login URL. This field is read-only, but you can copy the link to your clipboard.

10. To share the link, select it in the **Login Url** field, then copy it to your clipboard to paste into an email, document, etc.

11. If the URL needs to be regenerated for security reasons, click **Regenerate** to create a new link.

Editing the fields of an existing anonymous login will require a new **Login Url** link to be generated.

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.

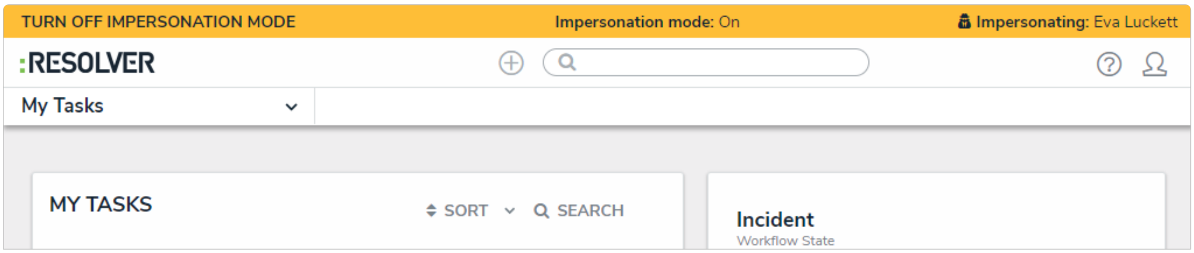
If IP authorization control is enabled on your org, your IP address will be validated against the IP allow list when activating **Impersonation Mode** and when disabling it. If your IP address cannot be validated, you'll be logged out. See the IP Authorization Control section for more details.

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.

2. 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.

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

Edit or Delete a User

Important Notes

In the User Profile section, administrators can change the user's first name, last name, or email address. However, if admins are making user profile changes in this way, any email address updates must be finalized by the user via the link in their confirmation email (sent to their previous email address).

The link will expire in 12 hours and must be re-sent if the change is not finalized before then. Until they click the link, the user can still log into Resolver Core using their previous email address (provided that it worked before). If the original email account was incorrect to begin with, or is no longer accessible, contact Resolver Support.

Instructions

To edit or delete an existing user:

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

2. Search by entering a user's first and/or last name in the text field or click on an account to open the **Edit User** page.

3. In the **User Profile** section:

   a. Edit the **First Name**, **Last Name**, and **Email** fields, as necessary.

   > Changes to the **Email** field will move the user profile into a pending state until the user clicks the email confirmation link. In this period, the admin can either resend the confirmation email or cancel the change by clicking **Resend Email Confirmation** or **Cancel Changes**, respectively.

   b. Click **Change User Information**, then **OK** to confirm.

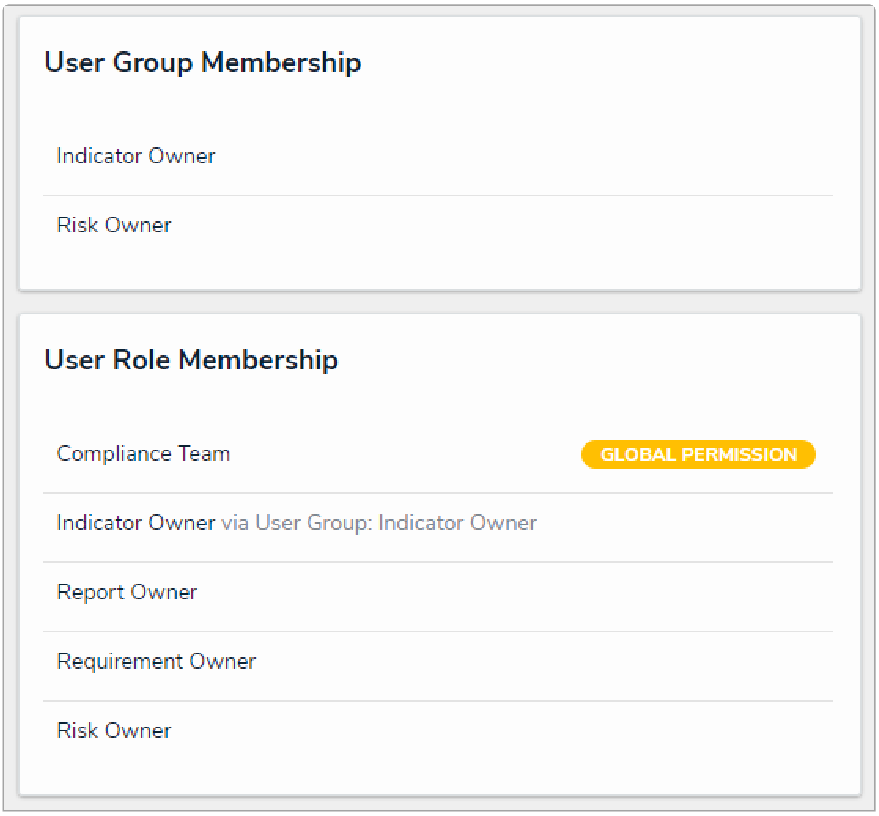
4. In the **Account Status** section:

   a. Click the or icons next to **User Enabled**, **Admin**, and/or **All Access** to enable or disable the user account and/or administrative rights.

   > All Access grants a user access to all object types and their objects within an organization. Therefore, you should only enable these settings when necessary for their role or assignment.

   b. Select a pre-configured language from the **Language** dropdown menu to choose how the UI and applications will be translated for the user. Note that the default language selected in a user's browser will take precedence.

5. To review the user groups or roles the account has been added to, click a group or role in the **User Group Membership** or **User Role Membership** section, which will display the **Edit Role** or **Edit User Group** page.



The User Group Membership and User Role Membership sections.

> It is better to **disable user accounts rather than to delete them**, to avoid impacting any existing role and assignment configurations (and their associated workflows). Note that disabled users are not counted towards your org's maximum user count.
>
> However, if a user's email address was incorrect from the start and they haven't been configured to any roles or assignments in the system, it is fine to delete their account and re-create a new one.

6. To delete the user, click the icon, then click **Yes** to confirm.

7. Click **Done** when finished.

Edit or Delete a User Group

If your organization is synced with LDAP, any instance of adding or removing users to a user group will need to be done from LDAP itself. If made in Core, any changes could be reverted during the next LDAP sync.

To edit or delete a user group:

1. Click the icon in the top bar > **User Groups** in the **People** section.
2. Enter keywords in the **Search** field to search for the user group by name or click a group to select it.
3. To edit the user group name or description, click the icon next to the user group name.
4. To add more users to the group, enter the user's name in the field below **Users**, then click **Add Selected**.

   Users who are currently logged in at the time they're added to a user group will need to log out then log back in before the changes are applied.

5. To delete a user from the group, click the icon next to their name, then click **Yes** to confirm.
6. To delete the user group, click the icon, then **Yes** to confirm.
7. Click **Done** when finished