

Edit or Delete a User

Last Modified on 04/20/2021 12:05 pm EDT

Overview

From the *Edit User* screen, an Administrator can edit a user's information, set the user account status and advanced permissions, and add the user to user groups and roles.

User Account Requirements

The user account you use to log into Resolver must have Administrator or advanced permissions to edit users.

Related Information/Setup

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

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

Please see the Assigning Advanced Permissions to a User article for adding advanced permissions to a user.

Please see the Managing Portal URL Membership article for more information on managing Portal URL membership for Portal URL Access users.

Please see the Resetting Multi-Factor Authentication and Opt-Out Multi-Factor Authentication for a Specific User articles for more information on opting out of and resetting MFA for an individual user.

Navigation

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



		⊕ Q Search	•••)	\$ © \$
Home	V My Tasks			
	My Tasks	\$ SORT Q SEARCH		

Administration Icon

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

			G Search		•••	0	0 2
lome	~	My Tasks				Admin Overview	
						Settings	
		My Tasks		\$ SORT Q SEARCH		20 User Management	
						Branding	
						E Languages	

Administrator Settings Menu

- 3. Enter a user's name in the **Search** field to narrow the search results.
- 4. Click the name of the user you want to edit.



	÷	Q Search		\$ @ L
Settings ~	User Management Branding Languages			
	User Management		▲ EXPORT AS CSV + CREATE USER	
	Q Val		0	
	100 Licensed Users 11 Enabled 0 Inactive 📀	Active/inactive users User permissions Select filters ~	User groups V Select filters V	
	Valentina Rodriguez Valentina.Rodriguez@email.com Last login: Never		IMPERSONATE	
				'

User Name

Editing a User

Note: The **Edit User** screen may look different if SSO or MFA is enabled on your Org.

- From the *Edit User* screen, an Administrator can edit the following fields under the User Profile section:
 - 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.
 - The following are different situation that can occur when change a user's email address:
 - If the Administrator who changes the email address is a member of all the same Orgs as the user. The email address change will take effect immediately.
 - If the Administrator who changes the email address 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.
 - If the user is logged in to the system. The user will see a system notification at the top of their screen, indicating Email Updated.
 - If 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 screen using



their original email address. On successful login, the user will see an Email Updated confirmation message.

In the User Profile section, an Administrator can edit the user's First Name, Last Name, or Email Address fields. Once you make a edit to one of these fields, click the Change User Information button to save the changes.

	⊕ (Q Search		\$ 0 £
Settings v User Management Branding Languages			
User Management : Edit User : Valentina Rodrig	uez		ADVANCED PERMISSIONS
User Profile		Account Status	
* First Name	* Last Name	Enable User Access	× Portal URL Access 9
Valentin	Rodriguez	Admin	× All Data Access
* Email		Enforce org-level MFA 😒	
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER	
CHANGE USER INFORMATION			
		English (United States)	~
User Memberships			
User Groups Roles		Advanced Permissions	
Select which User Group(s) this user is a member of		User Management 9	
Select one	- ADO + ADO	Create, manage, and assign users	_
		Select which User Group memberships this user	can manage Add All
No user gro	oups added	Select one	✓ + ADD
User Group Membership can only be added or removed from the User Groups which you hav	ze been granted permission to manage.		
			S V DONE

User Profile Section

- An Administrator can edit the following toggle switches and fields under the Account Status section:
 - Enable User Access: Select the Enable User Access toggle switch to enable (blue) or disable (grey) a user profile.
 - **Portal URL Access:** Click the **Portal URL Access** toggle switch to grant the user account access only to the Portal URL.

Note:

When you click the **Portal URL Access** toggle switch, the **Admin**, **All Data Access**, **Enforce Org Level MFA**, and **Advanced Permission** toggle switches will automatically be disabled.

- Admin: Select the Admin toggle switch to enable (blue) or disable (grey) Administration permissions.
- All Data Access: Select the All Data Access toggle switch to enable (blue) or disable (grey) all access, granting the user access to all object types and objects within an organization.
- For Orgs that have multi-factor authentication (MFA) enforced: An Enforce Org
 Level MFA toggle switch will be visible which allows Administrators to opt that user



out of MFA for that Org. Please see the Opt-Out Multi-Factor Authentication for a Specific User article for more information.

• 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 language .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.

		^ ^ ^ ^
		···
Settings V User Management Branding Languages		
User Management : Edit User : Valentina Rodrig	uez	
User Profile		Account Status
* First Name	* Last Name	Enable User Access Portal URL Access 9
Valentina	Rodriguez	X Admin All Data Access
* Email		Enforce org-level MFA •
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MPA FOR THIS USER
User Memberships		Language
User Groups Roles		English (United States)
Select which User Group(s) this user is a member of		Advanced Permissions
Select one	▼ + ADD	User Management O Create, manage, and assign users
No user gr	oups added	
User Group Membership can only be added or removed from the User Groups which you have	e been granteb permission to manage.	
		🗧 🗸 DONE

Account Status Section

 Click the User Management toggle switch under the Advanced Permissions section to grant the user advanced permissions. Please see the Assigning Advanced Permissions to a User article for adding advanced permissions to a user.



			\$ ® £
Settings v User Management Branding Languages			
User Management : Edit User : Valentina Rodrigi	Jez		
User Profile		Account Status	
* First Name	* Last Name	Enable User Access	Portal URL Access 9
Valentina	Rodriguez	Admin	All Data Access
*Email		Enforce org-level MFA 3	
Valentina Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER	
User Memberships		Language English (United States)	~
User Groups Roles			
Select which User Group(s) this user is a member of		Advanced Permissions	
Select one	✓ + ADD	User Management Create, manage, and assign users	
No user gro	pups added		
User Group Membership can only be added or removed from the User Groups which you have	e been granted permission to manage.		

User Management Toggle Switch

- 5. *For Portal URL Access users:* In the **User Group Membership** section, the **Portal URLs** tab shows which Portal URL a Portal URL Access user is assigned to. Please see the Managing Portal URL Membership article for more information.
- 6. In the User Group Membership section, the User Groups tab shows the user groups the user is enrolled in. To add a user to a user group, select the user group from the Select which User Groups(s) this user is a member of dropdown and click the Add button.

			\$ 0 \$
Settings v User Management Branding Languages			
User Management : Edit User : Valentina Rodrig	uez		
User Profile		Account Status	
* First Name	* Last Name	Enable User Access Portal URL Acce	ess 9
Valentina	Rodriguez	Admin All Data Access	
* Email		Enforce org-level MFA 9	
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER	
User Memberships User Groups Roles		Language English (United States)	*
Select which User Group(s) this user is a member of		Advanced Permissions	
Select one	✓ + ADD	User Management Create, manage, and assign users	
No user gi	oups added		
User Group Membership can only be added or removed from the User Groups which you ha	ve been granted permission to manage.		
			✓ DONE

User Groups Tab

 Click a User Group to open the *Admin: Edit User Group* screen to view further details, remove, and add a user to the user group.



			\$? L
Data Access	V User Groups Roles		
	Admin:Edit User Group		
	Alert Owners	,	
	Users		
	Q Search for User(s)	+ ADD SELECTED (0)	
	Valentina Rodriguez	×	
	±	Changes to group membership will not be applied until the user logs out and back in	
	Roles The following Roles have been linked to this Group		
	Alert Owner		
		🗇 🗸 DONE	

Edit User Groups Screen

 In the User Group Membership section, the Roles tab shows the roles the user is enrolled in. To add a user to an individual role, select the role from the Select which Role(s) this user is a member of dropdown and click the Add button.

			•••	\$ @ A
Settings V User Management	Branding Languages			
User Management : Edit User : N	/alentina Rodriguez			
User Profile			Account Status	
* First Name	* Last Name		Enable User Access	Portal URL Access 🧿
Valentina	Rodriguez		Admin	× All Data Access
* Email			Enforce org-level MFA 😏	
Valentina.Rodriguez@email.com			RESET ORG-LEVEL MFA FOR THIS USER	
			1	
User Memberships			Language	
User Groups Roles			English (United States)	
Select which Role(s) this user is a member of			Advanced Permissions	
Select one		✓ + ADD		
Alert Owner via User Group: Alert Owners			User Management Create, manage, and assign users	
Role Membership can only be added or removed from the R	toles which γou have been granted permission to manage.			
			1	
				🗂 🗸 DONE





9. Click a **Role** to open the *Admin: Edit Role* screen to view further details, remove, and add a user to a role.



		\$ ® \$
Data Access	V User Groups Roles	
	Admin : Edit Role	
	Announcement Viewer GLOBAL PERMISSIONS	
	All Applications • Read only access to all active announcements for portal users • Grants Announcements activity in Portal • Key Forms: o Announcement – IRM - Read	
	Object Types	
	Select one V EDIT PERMISSIONS	
	Announcement ×	
	Users	
	Q Search for User(s) + ADD SELECTED (0)	
	Valentina Rodriguez ×	

Edit Role Screen

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

			\$ @ L			
Settings V User Management Branding Languages						
Jser Management : Edit User : Valentina Rodriguez						
User Profile		Account Status				
* First Name	* Last Name	Enable User Access Portal URL Access	s O			
Valentina	Rodriguez	Admin All Data Access				
* Email		Enforce org-level MFA 😡				
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER				
User Memberships		Language				
		English (United States)	~			
User Groups Roles						
Select which User Group(s) this user is a member of		Advanced Permissions				
Select one	✓ + AD0	User Management O Create, manage, and assign users				
No user gro	oups added					
User Group Membership can only be added or removed from the User Groups which you hav						
			V DONE			

Done Button