

# **Assigning Advanced Permissions to a User**

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# **Overview**

Administrators can grant Standard users limited access to use some administrative features by assigning them advanced permissions.

For a full list of permissions that each advanced permissions type grants the user, please read the Advanced Permissions Types article. The five types of advanced permissions are:

- Data Import Management: Manage data imports and reassign data
- Data Management: Manage reports and dashboards
- Settings Management: Manage all tasks under the Administrator Settings menu
- User Impersonation: Impersonate users
- **User Management:** Create, manage, and assign user accounts, group memberships, and roles within the system

### **Related Information/Setup**

For more information on creating and editing a user, please refer to the Creating a New User and Editing a User articles.

For a full list of permissions that each advanced permissions type grants the user, please refer to the Advanced Permissions Types article.

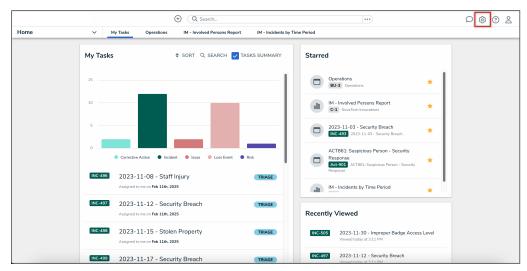
### **User Account Requirements**

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

## Navigation

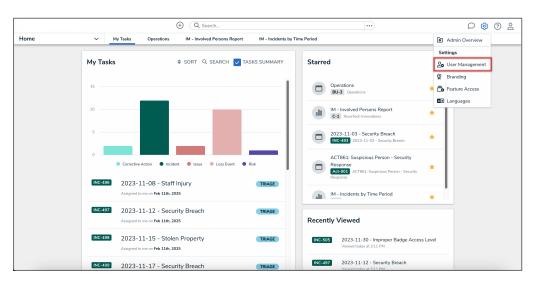
1. From the *Home* screen, click the **Administration** icon.





Administration Icon

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



Administrator Settings Menu

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



		÷	Q Search				\$ ?	9
Settings ~	User Management Branding	Languages						_
	User Management				호 EXPORT AS CSV	+ CREATE USER		
	Q Val					0		
	100 Licensed Users   11 Enabled   0	Inactive 😏	Active/inactive users	User permissions	User groups	~		
	Last login: Never	om				IMPERSONATE		

User Name

## **Assigning Advanced Permissions to a User**

*Note:* Administrators can only grant advanced permissions to a **Standard** user.

 From the *Edit User* screen, in the User Memberships card, click the Advanced Permissions tab.

	④ Q Search	69 69 62
Settings V User Management Branding	Languages	
User Profile		Account Status
* First Name	* Last Name Rodriguez	Enable User Access
* Email Valentina.Rodriguez@email.com		Enforce Org-Level MFA  Reset org-Level MFA  Reset org-Level MFA for this user
		Language English (United States)
User Type		
Standard User	~	
Default user type, able to access platform based on their memberships and permissions.		
User Memberships User Groups (1) Roles (3) Advanced Permissions (0)		
Select which Advanced Permission(s) this user has Select one	× + ADD	
Select one	✓ + ADD	
No Advanced F		

User Memberships Card

- From the Select which Advanced Permission(s) this user has dropdown, select one of the following options:
  - Data Import Management: Manage data imports and reassign data
  - Data Management: Manage reports and dashboard



- Settings Management: Manage all tasks under the Administrator Settings menu
- User Impersonation: Impersonate users
- **User Management:** Create, manage, and assign user accounts, group memberships, and roles within the system

	•••	\$ @ L
Settings V User Management Branding Feature Access Languages		
	RESET ORG-LEVEL MFA FOR THIS USER	
User Type	Language	
	English (United States)	~
Standard User	×	
Default user type, able to access platform based on their memberships and permissions.		
User Memberships		
User Groups (1) Roles (3) Advanced Permissions (1)		
Select which Advanced Permission(s) this user has		
Select one V	+ ADD	
Data Import Management		
Manage data imports and reassign data	×	
Settings Management		
Manage all tasks under Settings		DONE
User Impersonation	-	
Impersonate users		
User Management		
Create, manage, and assign user accounts, group memberships, and roles within the system		

#### Advanced Permissions Dropdown



3. Click the **Add** button to grant that user the selected advanced permissions.

	⊕ Q Search		•••	\$	3 2
Settings V User Management Branding	Languages				
* First Name	* Last Name		Enable User Access	× All Data Access	
Valentina	Rodriguez				
* Email			Enforce Org-Level MFA 3		
Valentina.Rodriguez@email.com			RESET ORG-LEVEL MFA FOR THIS USER		
Valenana, toanguezgenancom			Language		_
User Type			English (United States)		~
User Type					
Standard User		~			
Default user type, able to access platform based on their memberships and permissions.					
User Memberships					
Oser Memberships					
User Groups (1) Roles (3) Advanced Permissions (0)					
Select which Advanced Permission(s) this user has					
Data Management ×		+ ADD			
No Advanced Pe	ermissions Added				
				<b>•</b> ~	DONE



4. For the **Settings Management** advanced permission, Administrators will have to further configure which user groups and roles the user will be able to assign to other users. Under



**Permission to Assign Membership(s)**, click the **Manage Permissions to Assign** link.

	•••	오 \$P @ 2
Settings v User Management Branding Feature Access Languages		
User Type Standard User V Default user type, able to access platform based on their memberships and permissions.	Language English (United States)	~
User Groups (0)         Roles (0)         Advanced Permissions (1)		
Select which Advanced Permission(s) this user has Select one		
Settings Management ×		
Permission to assign membership(s) Dilan Friedman can assign membership to 0 User Group(s) and 0 Role(s) via the Settings Management Advanced Permission(s).   MANAGE PERMISSIONS TO ASSIGN		

Manage Permissions to Assign Link

 From the User Groups tab, in the Select which User Group memberships this user can manage dropdown, enter a user group name and select a user group or multiple user groups.

	Q Search		\$ 0 £
Settings V User Management Branding	Languages		
User Management : Edit User : Valentina F	Podriguez	PERMISSION TO ASSIGN MEMBERSHIP(S)	
User Management. Luit User, Valentina P	User Groups Roles		
User Profile	Select which User Group memberships this user can manage	Add All	
* First Name	* Last Name	Activity Owner (Limited User) ×	V + ADD
Valentina	Rodriguez		
* Email			
Valentina.Rodriguez@email.com			
User Type			
Standard User			
Default user type, able to access platform based on their memberships and permissions.			
User Memberships			
User Groups (1) Roles (3) Advanced Permissions (1)			
Select which Advanced Permission(s) this user has			
Select one			
Settings Management			

User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user is assigned to manage.
- (**Optional**): Click the **Add All** checkbox to select all available user groups, allowing the user to manage all user groups in the system.
- From the **Roles** tab, in the **Select which Role memberships this user can manage** dropdown, enter a role name and select a role or multiple roles.



	(Q Search		\$ @ \$
Settings V User Management Branding	Languages		
User Management: Edit User: Valentina	Rodriguez	PERMISSION TO ASSIGN MEMBERSHIP(S)	
User Management. Luit User, Valentina	Rounguez	User Groups Roles	
User Profile		Select which Role memberships this user can manage	Add All
* First Name	* Last Name	Select one	✓ + ADD
Valentina	Rodriguez		
* Email			
Valentina.Rodriguez@email.com			
User Type			
Standard User			
Default user type, able to access platform based on their memberships and permissions			
User Memberships			
User Groups (1) Roles (3) Advanced Permissions (1)			
Select which Advanced Permission(s) this user has			
Select one			
Settings Management			

Roles Tab

- Click the Add button to add all selected roles to the list of roles the user is assigned to manage.
- (**Optional**): Click the **Add All** checkbox to select all available roles, allowing the user to manage all roles in the system.



#### Note:

Users with the **Settings Management** advanced permission will only have access to edit the user group memberships of the user groups and the roles that they have been assigned to manage.

 For the User Management advanced permission, Administrators will have to further configure which user groups and roles the user will be able to assign to other users. Under Permission to Assign Membership(s), click the Manage Permissions to Assign link.

			÷	Q Search				D @ 0 2
Settings	~	User Management	Branding	Feature Access	Languages			
User Type							English (United States)	~
Standard User						~	English (office oraco)	
Default user type, able to	access platform	based on their membership	s and permission	s.				
User Membersh	ips							
User Groups (0)	Roles (0)	Advanced Permissic	ns (1)					
Select which Advanced	d Permission(s	) this user has						
Select one						✓ + ADD		
User Management						×		
Permission to assign	n membership(	s)						
Dilan Friedman can a	ssign member	ship to 0 User Group(s)	and <b>0</b> Role(s) vi	a the User Manageme	ent Advanced Permission(	i).		
S MANAGE PERMI	SSIONS TO A	SSIGN						
								🖬 🗸 DONE

Manage Permissions to Assign Link



 From the User Groups tab, in the Select which User Group memberships this user can manage dropdown, enter a user group name and select a user group or multiple user groups.

	(Q. Search	•••)	\$ 0 \$
Settings V User Management B	Iranding Languages		
User Management : Edit User : Vale	ontina Podriguez	PERMISSION TO ASSIGN MEMBERSHIP(S)	
User Management. Luit User . Vale	andna Rounguez	User Groups Roles	
User Profile		Select which User Group memberships this user can manage	Add All
* First Name	* Last Name	Select one	✓ + ADD
Valentina	Rodriguez		
* Email			
Valentina.Rodriguez@email.com			
User Type			
Standard User			
Default user type, able to access platform based on their memberships and	permissions.		
User Memberships			
User Groups (1) Roles (3) Advanced Permissions (1)			
Select which Advanced Permission(s) this user has			
Select one			
User Management			

User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user is assigned to manage.
- (**Optional**): Click the **Add All** checkbox to select all available user groups, allowing the user to manage all user groups in the system.
- From the **Roles** tab, in the **Select which Role memberships this user can manage** dropdown, enter a role name and select a role or multiple roles.

	( Q. Search		\$ ® \$
	anagement Branding Languages	PERMISSION TO ASSIGN MEMBERSHIP(S)	×
User Management : Edit l	User Management : Edit User : Valentina Rodriguez		
User Profile		Select which Role memberships this user can manage	Add All
* First Name	* Last Name	Select one	✓ + ADD
Valentina	Rodriguez		
* Email			
Valentina.Rodriguez@email.com			
User Type			
Standard User			
Default user type, able to access platform based on the	eir memberships and permissions.		
User Memberships			
User Groups (1) Roles (3) Advance	ed Permissions (1)		
Select which Advanced Permission(s) this user	has		
Select one			
User Management			

Roles Tab

- Click the **Add** button to add all selected roles to the list of roles the user is assigned to manage.
- (**Optional**): Click the **Add All** checkbox to select all available roles, allowing the user to manage all roles in the system.



Note:

Users with the **User Management** advanced permission will only have access to edit the user group memberships of the user groups and the roles that they have been assigned to manage.

 For the User Impersonation advanced permission, Administrators will have to further configure which users the user will be able to impersonate. Under Permission to impersonate, click the Manage Permissions to Assign link.

*Note:* Users with the **User Impersonation** advanced permission will only be able to impersonate Standard users without any advanced permissions.

			(+)	Q Search			•••	D @ ? 2
Settings	~	User Management	Branding	Feature Access	Languages			
User Type							English (United States)	~
Standard User						~		
Default user type, able t	o access platform l	pased on their memberships	and permissior	15.				
User Members	hips							
User Groups (1)	Roles (3)	Advanced Permission	s (1)					
Select which Advanc	ed Permission(s	this user has						
Select one						✓ + ADD		
User Impersonation						×		
Permission to impe								
Valentina Rodrigue	z can impersonat	e users from <b>0</b> User Grou	ıp(s) and <b>0</b> Ro	le(s) via the User Impe	rsonation Advan	ed Permission(s).		
C MANAGE PERM	MISSIONS TO IM	PERSONATE						

Manage Permissions to Impersonate Link

• From the User Groups tab, in the Select which User Group memberships this user can impersonate other users from dropdown, enter a user group name and select a user group or multiple user groups.



(	Q Search		D & @ 2
Settings V User Management Brandin	ng Feature Access Languages		
		PERMISSION TO IMPERSONATE	
User Management : Edit User : Valenti	ina Rodriguez	User Groups Roles	
User Profile		Select which User Group memberships this user can impersonate other users from	Add All
* First Name	* Last Name	Select one	✓ + ADD
Valentina	Rodriguez	L	
* Email			
Valentina.Rodriguez@email.com			
User Type			
Standard User			
Default user type, able to access platform based on their memberships and permissions.			
User Memberships			
User Groups (1) Roles (3) Advanced Permissions (1)			

User Groups Tab

- Click the **Add** button to add all selected user groups to the list of user groups the user can impersonate.
- (**Optional**): Click the **Add All** checkbox to select all available user groups, allowing the user to impersonate all user groups in the system.
- From the Roles tab, in the Select which Role memberships this user can impersonate other users from dropdown, enter a role name and select a role or multiple roles.

	···
Settings V User Management Branding Feature Acc	ccess Languages
User Profile	PERMISSION TO IMPERSONATE ×
* First Name * Last Name	User Groups Roles
Valentina Rodriguez	Select which Role memberships this user can impersonate other users from Add All
* Email	Select one V + ADD
Valentina.Rodriguez@email.com	
User Type	
Standard User	
Default user type, able to access platform based on their memberships and permissions.	
User Memberships	
User Groups (1) Roles (3) Advanced Permissions (1)	
Select which Advanced Permission(s) this user has	
Select one	
User Impersonation	

Roles Tab

- Click the **Add** button to add all selected roles to the list of roles the user can impersonate.
- (**Optional**): Click the **Add All** checkbox to select all available roles, allowing the user to impersonate all user groups in the system.
- 7. Click the **Done** button to save your changes.



		···
Settings V User Management Branding	Languages	
User Profile		Account Status
* First Name	*Last Name	Enable User Access
Valentina	Rodriguez	
* Email		Enforce Org-Level MFA 💿
Valentina.Rodriguez@email.com		RESET ORG-LEVEL MFA FOR THIS USER
		Language
User Type		English (United States) V
Standard User	~	
Default user type, able to access platform based on their memberships and permissions.		
User Memberships		
User Groups (1) Roles (3) Advanced Permissions (1)		
Select which Advanced Permission(s) this user has		
Select one	✓ + ADD	
Data Management	×	

Done Button