Add a Clear Roles Action to a Transition

Last Modified on 09/11/2024 2:39 pm EDT

Overview

The **Clear Roles** action clears the values from selected fields on a form (excluding formulas). This is 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working with existing assessments because they avoid the need to go into the assessment and manually remove data that's no longer applicable.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 Roles** action may be used when assigning an object type or assessment to a new user in a different role.

Before you can create this action on a workflow state, the fields must be added to the object type as components and a transition must be created.

> ***Note:***
> *Avoid using the* **Clear Roles** *and* **Role Management** *action on the same transition. The* **Clear Roles** *action clears all roles from a form.*

User Account Requirements

The user must have Administrator permissions to access the ***Admin Overview*** screen.

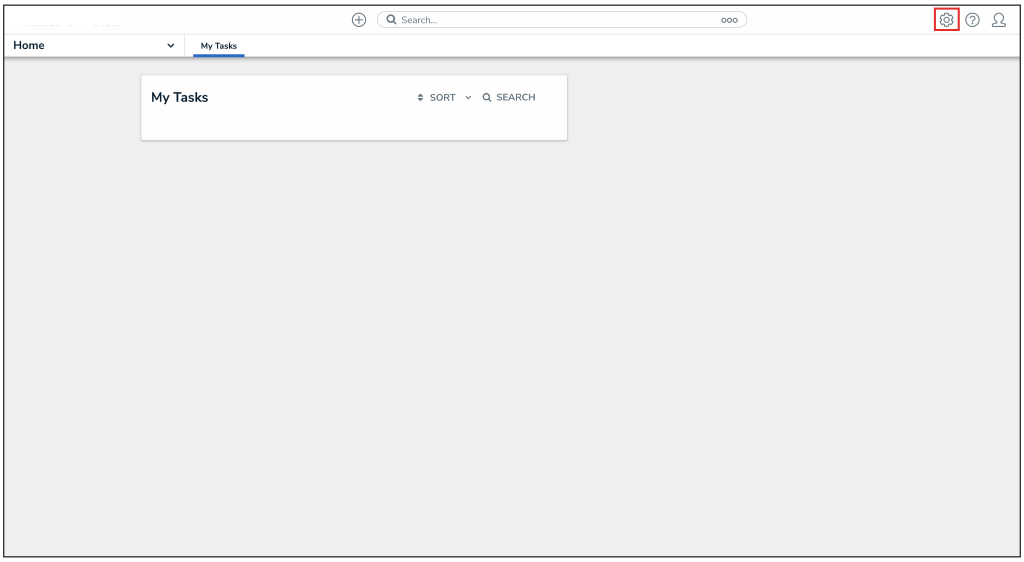
Required Information/Setup

Please refer to the Add a Trigger & Transition to a State article for instructions on how to add triggers and transitions.

Please refer to the Roles and Workflow Permissions sections for more information on configuring roles and workflow permissions.

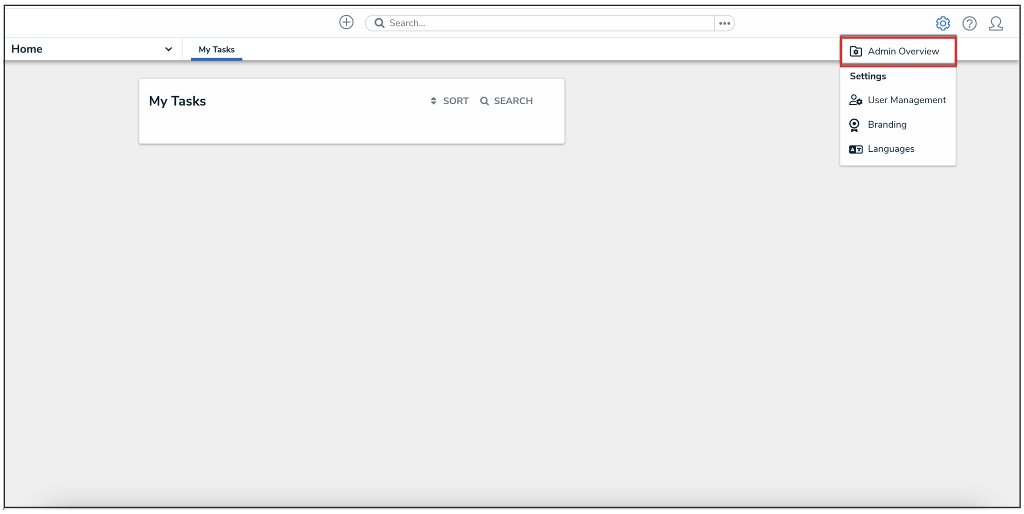
Navigation

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



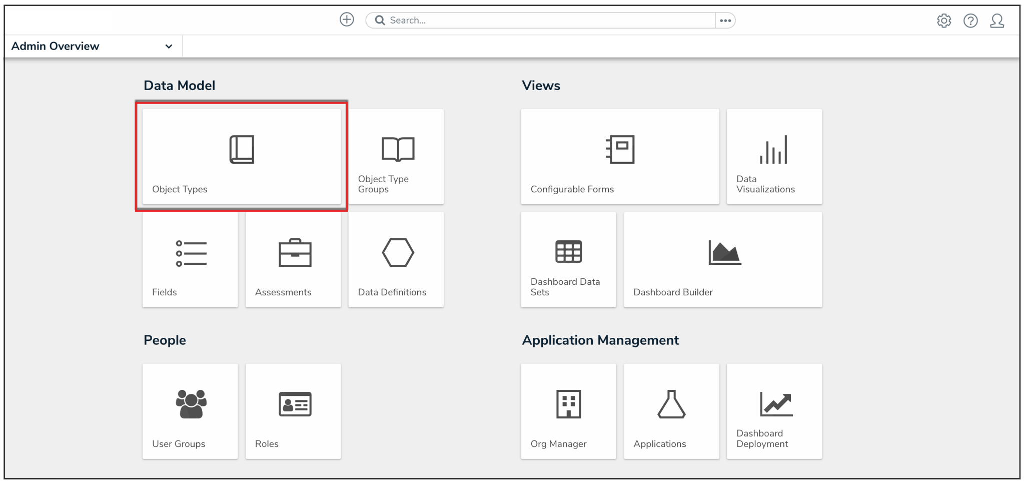
Administration Icon

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



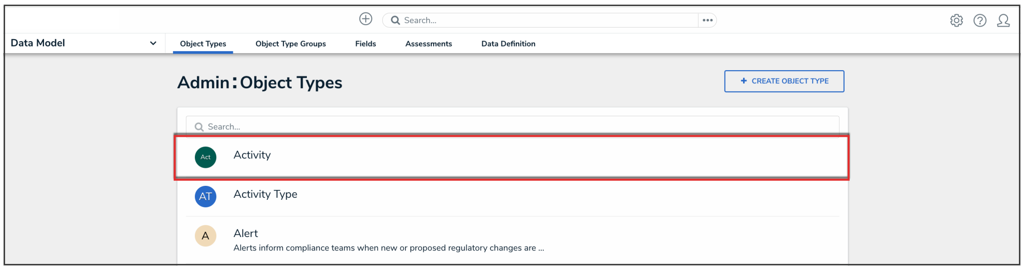
Administrator Settings Menu

3. From the ***Admin Overview*** screen, click the **Object Types** tile under the **Data Model** section.



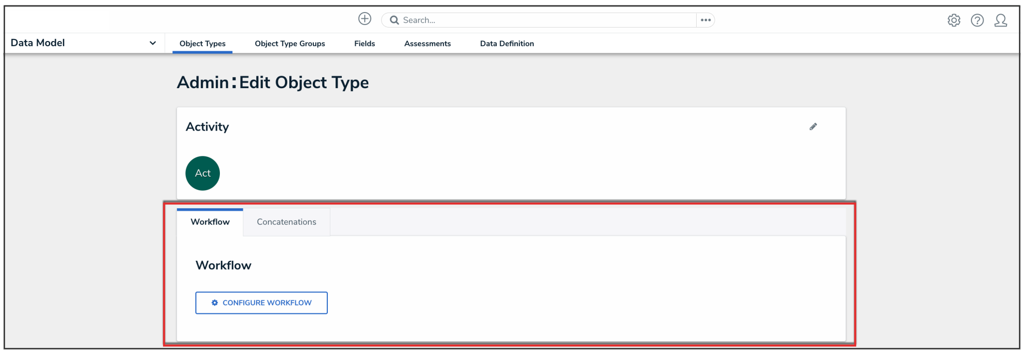
Object Types Tile

4. From the ***Object Types*** screen, enter an object type name in the **Search** field to narrow down the object types list.
5. Click the object type name you want to edit.



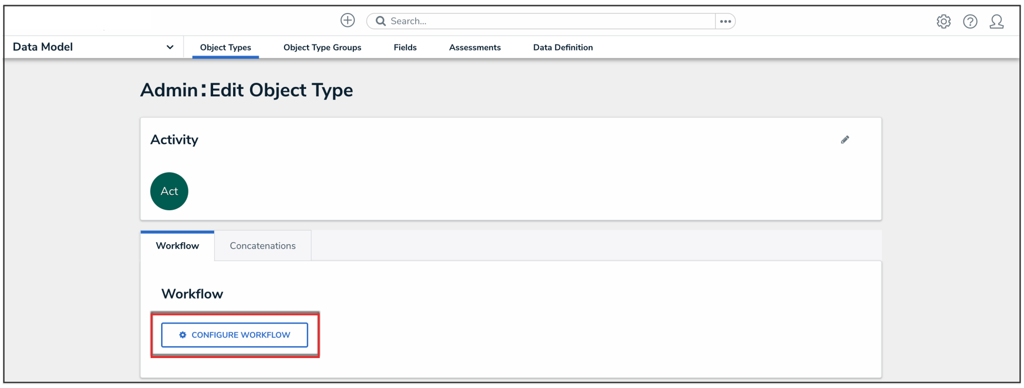
Object Type Name

6. From the ***Edit Object Type*** screen, click a workflow under the **Workflow** tab.



Workflow Tab

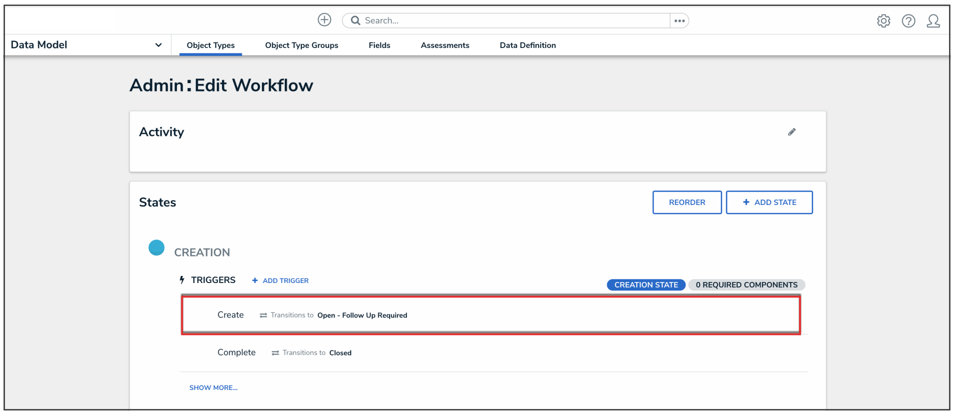
7. If there are no workflows listed, click the **Configure Workflow** button.



Configure Workflow Button

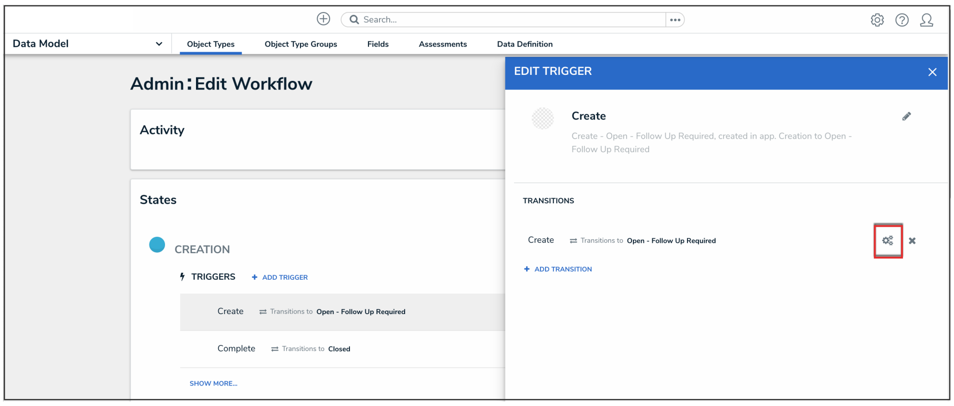
Add a Clear Roles Action to a Transition

1. From the ***Edit Workflow*** screen, click the trigger that you want to add the **Clear Roles** action to.



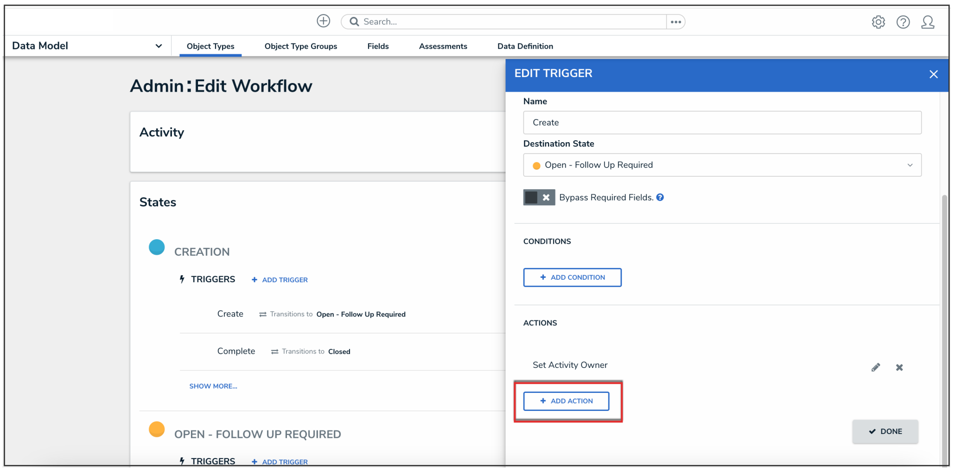
Workflow Trigger

2. From the **Edit Trigger** pop-up, click the **Configure** icon under **Transitions**.



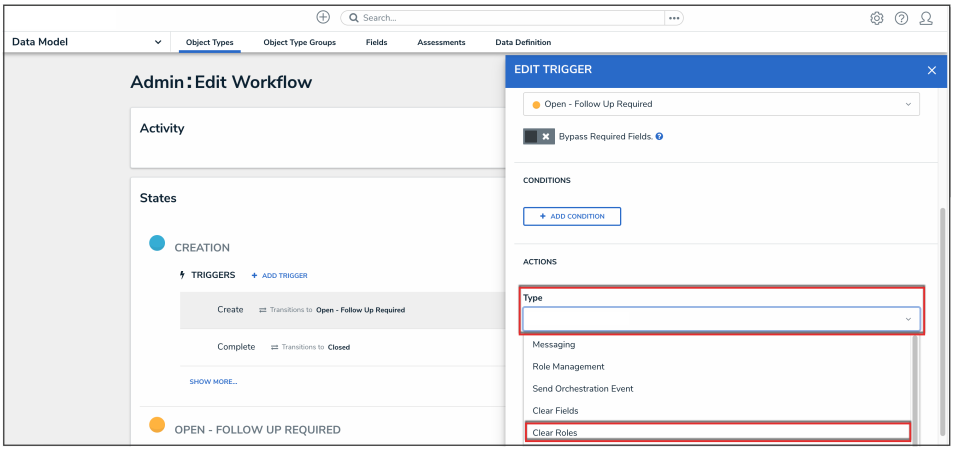
Configure Icon

3. Click the **Add Action** button under **Actions**.



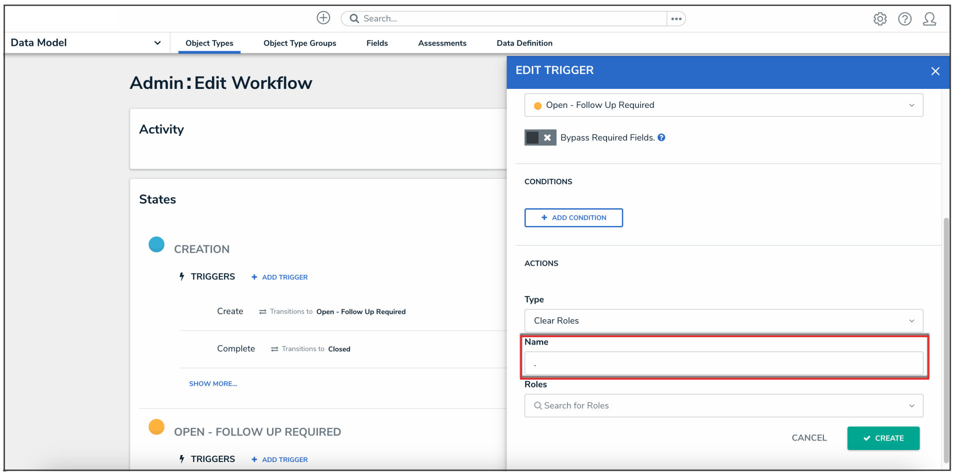
Add Action Button

4. Select **Clear Roles** from the **Type** dropdown menu.



Type Dropdown

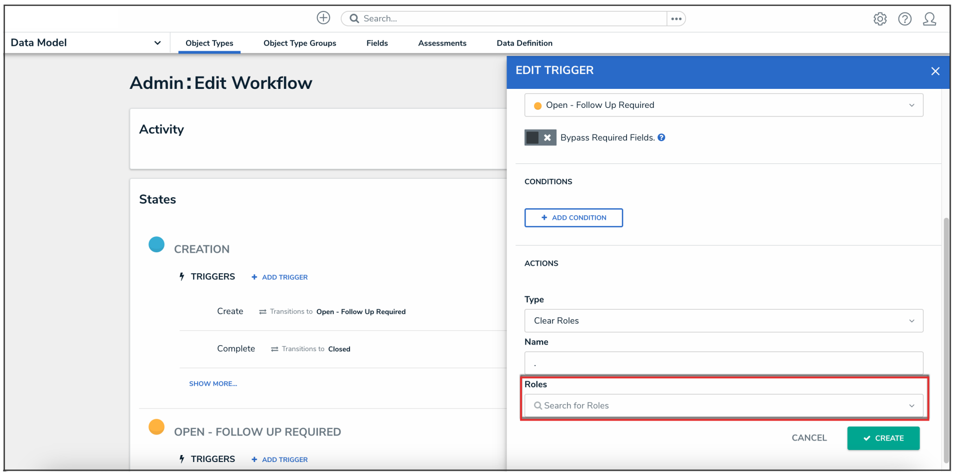
5. Enter a name for the action in the **Name** field.



Name Field

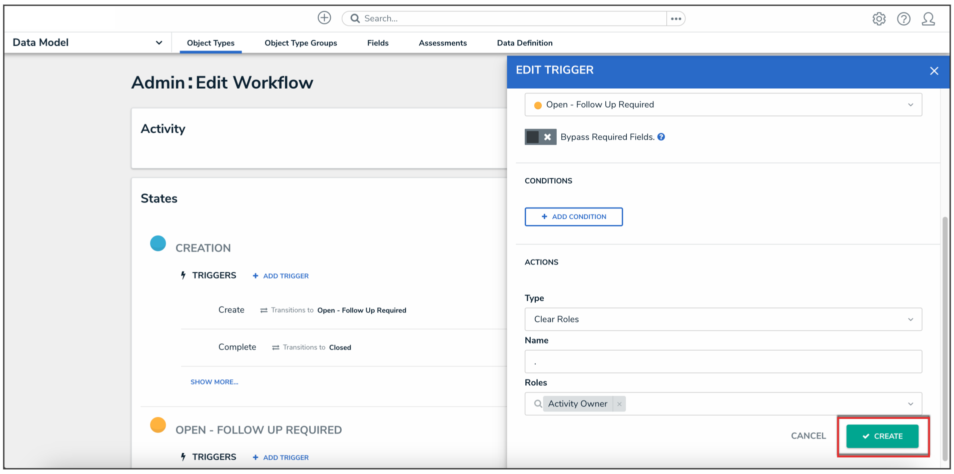
6. Select the roles you wish to clear data from (once the object transitions) from the

Roles dropdown menu.



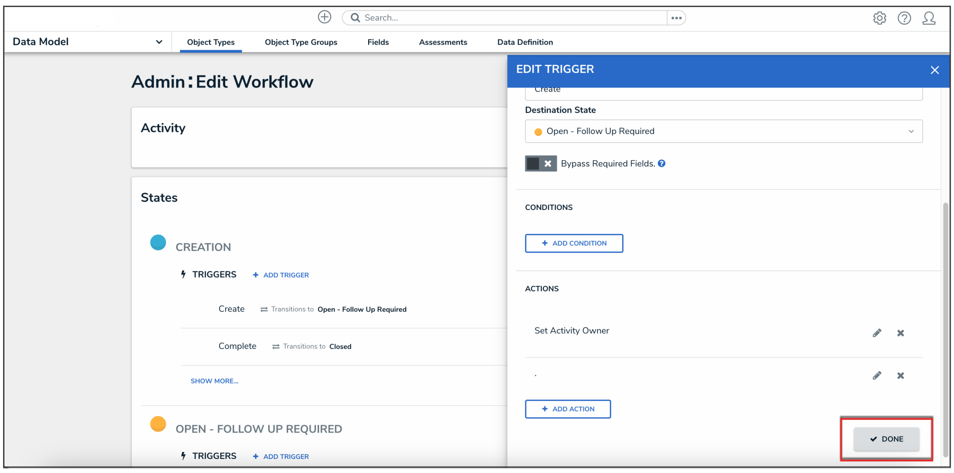
Roles Dropdown

7. Click the **Create** button.



Create Button

8. From the **Edit Trigger** pop-up, click the **Done** button to save your changes.



Done Button