Resolver.
A KROLL BUSINESS

Maintenance Administration - Quick Start Guide

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Overview

As an Administrator, you must maintain the application(s) after the go live period has ended. The following is a list of requirements that must be maintained regularly.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to perform the following functions.

User Maintenance

- Creating Users
  - A user account must be setup for each individual who needs access to the Resolver environment.
- Assigning Users to a User Group
  - An Administrator or user with Advanced Permissions can assign a user to a group when creating or editing a user, without going through the User Groups section.
- Impersonating Users
  - Administrators can temporarily assume the account of another user to work with objects according to that user’s role and permissions.
- Deactivating Users
  - Deactivating an account prevents the user from logging in and accessing data.

Field Maintenace

- Updating Select List Field Values (e.g., Remaining a Field)
  - Administrators can edit and delete an existing field.

Report Modifications

- Editing/Updating a Report Chart
  - Pie Charts display numeric data based on the data definition selected and can be displayed as a full pie chart or half-pie chart.
- Editing/Updating a Report Table
  - Users can display additional information on a table by adding or editing table elements (e.g., columns, parameters, etc.).

- Add Parameters to a Report
    - A report **parameter** controls the data displayed in a report and all its elements.
- Add Filters to a Report
    - A **Data Visualization Filter** is an optional feature that allows end-users viewing a report to narrow report data by applying Data Visualization Filters from the ***Filters*** pop-up on a Report.
- Editing/Updating a Data Grid
    - A **Data Grid** is a data visualization that displays object data in a spreadsheet-style format.

Email Template Modifications

- Adding Variables to an Email Template
    - Email templates allow an Administrator to configure the information (e.g., object fields and properties) that appear on an email.
- Creating a New Custom Email Template
    - An Administrator can create a new custom email template for emails sent through using messaging action on a workflow.
- Editing or Deleting a Custom Email Template
- Editing the Default (Standard or Assigned) Email Templates
    - An Administrator can edit the Standard or Assigned email templates. Standard and Assigned email templates are default templates within an organization.
- Using an Organization Logo for Branding Email Templates
    - Administrators can use the organization logo for branding email templates.

Form Modifications

- Adding Form Elements to a Standard Form
    - An Administrator can add elements (e.g., Fields, Formulas, Roles, Relationships, References, etc.) to an existing form once those elements have been saved to the object type as components.
- Configuring Formulas on Forms
- Configuring Fields on Forms
- How Roles Function on Forms
    - Roles control the data a user can create, edit, delete, view, or manage on object types and are added to object types as components.
- Configuring Free Form Text on Forms
    - Through the free form text element, you can add headers, titles, instructions, or additional information to your configurable forms.
- Configuring References on a Form

- A **Reference** element in a standard form indicates that an object is referenced to other objects through a relationship. Administrators can configure how the information is displayed, as well as what tasks end-users can do through the Reference element.
- Configuring Relationships on a Form
  - Relationships can be displayed on Forms as dropdown menus or tables, where end users can search for and/or create new objects through that relationship, depending on the element's settings.