

Duplicating an Existing Role

Last Modified on 11/18/2024 10:19 am EST

Overview

Administrators can create a copy of an existing role, including permissions, as either a global or an explicit role.

The following configuration data is included when creating a copy of an existing role:

- Object type permissions
- Advanced options
- Global role membership

The following data is not copied to the new role:

- User data
- Inferred role permissions and membership to an object type (when copying from a non-global role)
- Workflow email notification messaging actions
- Workflow role actions
- Permission to access activities
- Membership to dashboard data sets

User Account Requirements

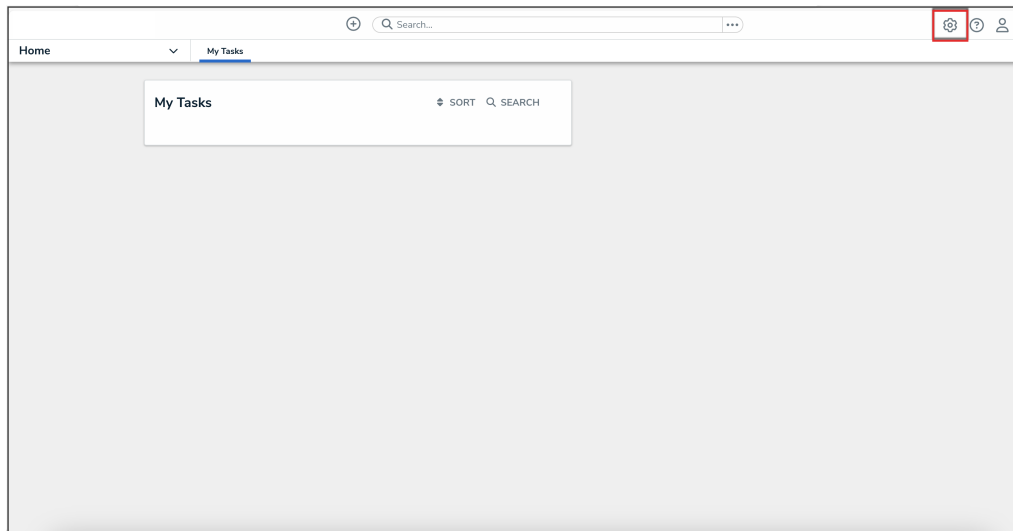
The user account used to log into Resolver must have Administrator permission to access the **Data Access** section.

Related Information/Setup

Please refer to the [Inferred Permissions Overview](#) and [Add Inferred Permissions on an Object Type](#) articles for more information on adding a new duplicated role to an object type and defining its inferred permissions path.

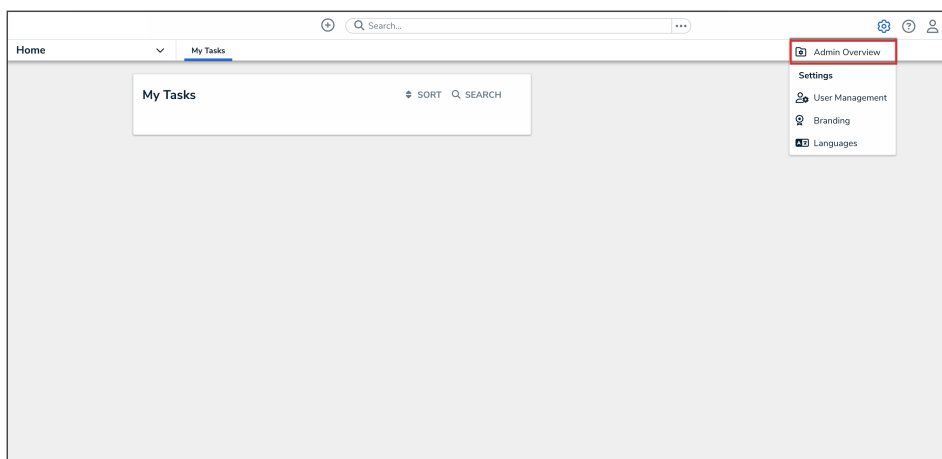
Navigation

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



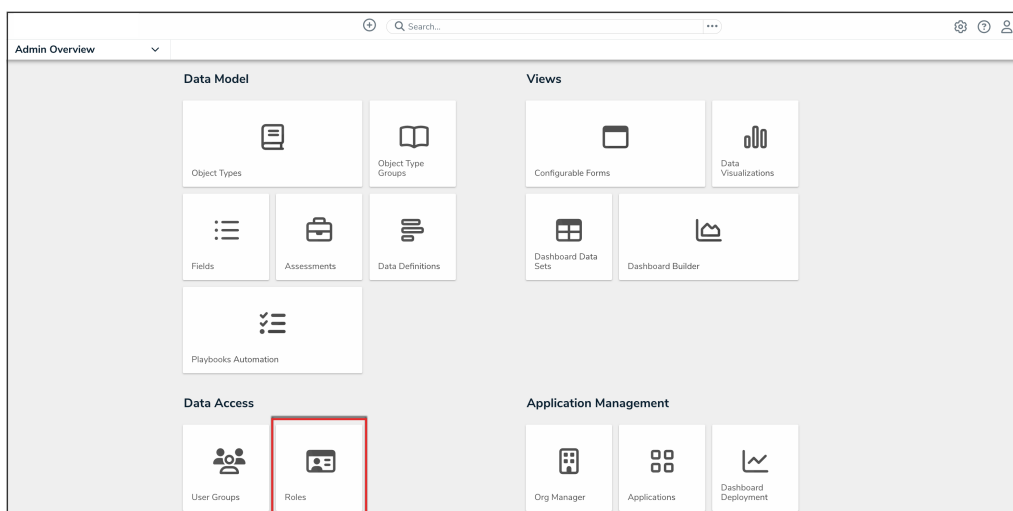
Administration Icon

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



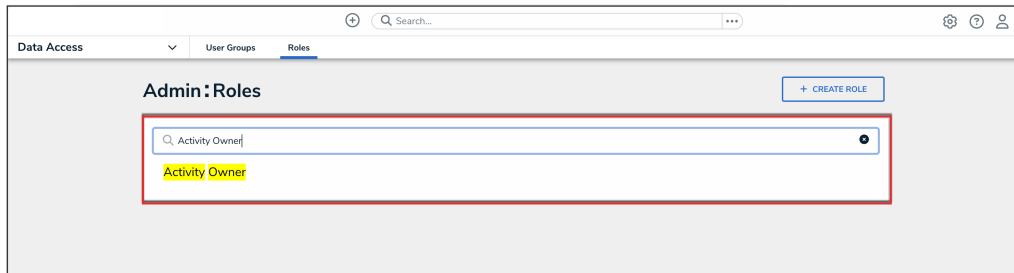
Administrator Settings Menu

3. From the **Admin: Overview** screen, click the **Roles** tile under the **Data Access** section.



Roles Tile

- From the **Roles** screen, enter a keyword in the **Search** field to narrow the search results.

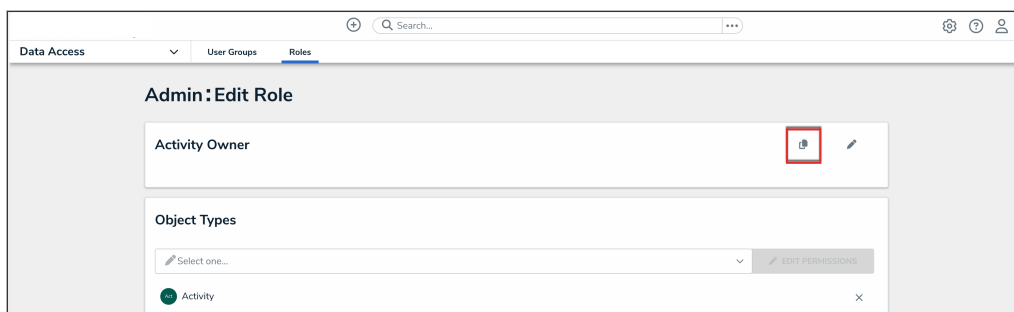


Search Field

- Click the role that you want to duplicate.

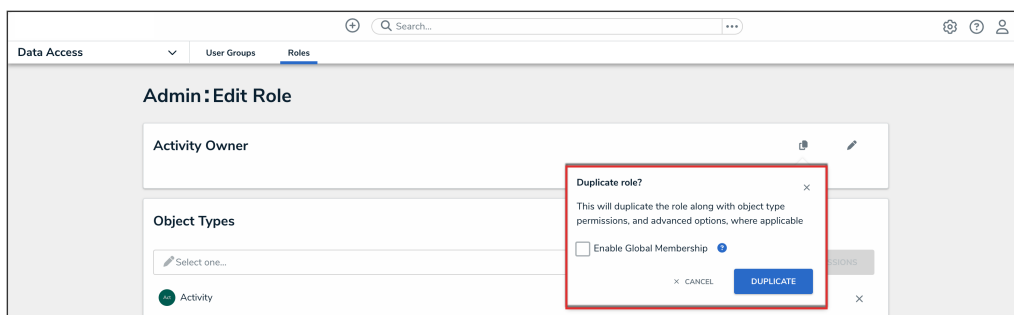
Creating a Duplicate Role

- From the **Edit Role** screen, click the **Duplicate** icon.



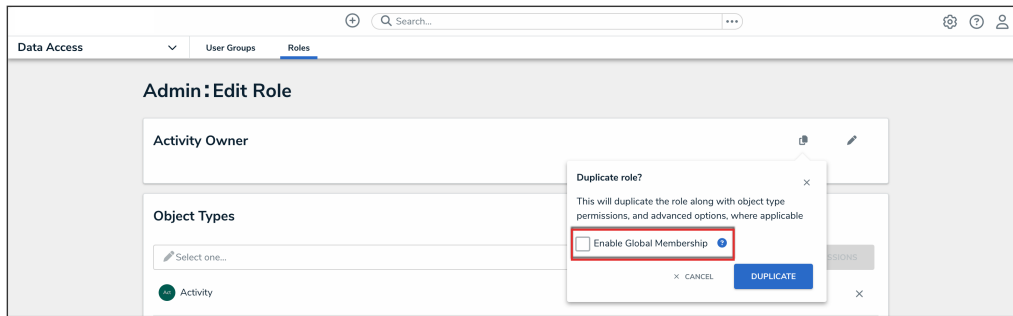
Duplicate Icon

- The confirmation screen will appear.



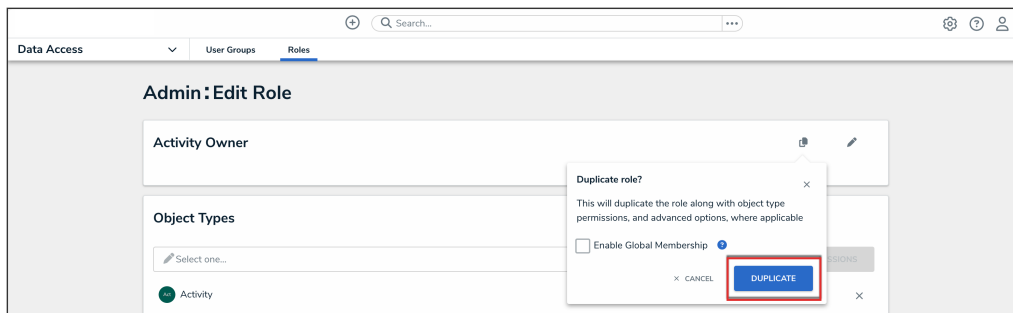
Confirmation Screen

- (Optional):** Click the **Enable Global Membership** checkbox to enable global permissions on the duplicate role. Leave the **Enable Global Membership** checkbox unchecked to duplicate the role with explicit permissions.



Enable Global Membership Checkbox

4. Click the **Duplicate** button to duplicate the role.



Duplicate Button