

Duplicating an Existing Role

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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 nonglobal 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.



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Home	V My Tasks			
	My Tasks	\$ SORT Q SEARCH		

Administration Icon

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

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Home	V My Tasks		Admin Overview	
			Settings	
	My Tasks	♦ SORT Q SEARCH	20 User Management	
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Administrator Settings Menu

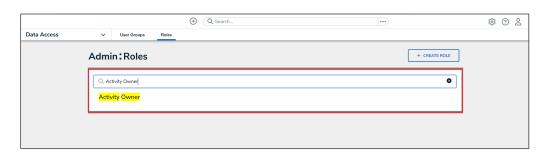
3. From the *Admin: Overview* screen, click the **Roles** tile under the **Data Access** section.

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Admin Overview 🗸					
	Data Model		Views		
	Object Types	Object Type Groups	Configurable Forms	Data Visualizations	
	Fields	Data Definitions	Dashboard Data Sets Dashboard Builder	<u> </u>	
	Playbooks Automation				
	Data Access		Application Management		
	User Groups Roles		Org Manager Applications	Dashboard Deployment	



Roles Tile

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





5. Click the role that you want to duplicate.

Creating a Duplicate Role

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

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Data Access	✓ User Groups Roles				
	Admin:Edit Role				
	Activity Owner			0	
	Object Types				
	Select one		~		
	Activity			×	

Duplicate Icon

2. The confirmation screen will appear.

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Data Access	~	User Groups	Roles					
	Admi	n:Edit Ro	ble					
	Activi	ty Owner				ð	/	
					Duplicate role?	×		
	Object Types			This will duplicate the role along with object ty permissions, and advanced options, where app				
	Sel 🖉	ect one			Enable Global Membership 3		SSIONS	
	Ad Ad	tivity			× CANCEL DUPL	CATE	×	



 (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.



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Data Access	V User Groups Roles		
	Admin: Edit Role		
	Activity Owner	d 🖉	
		Duplicate role?	
	Object Types	This will duplicate the role along with object type permissions, and advanced options, where applicable	
	Select one	Enable Global Membership	
	Activity	× CANCEL DUPLICATE ×	

Enable Global Membership Checkbox

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

				G Search				\$ ® \$
Data Access	~	User Groups	Roles					
	Admi	n:Edit Ro	ole					
	Activi	ty Owner					1	
	Objec	t Types			Duplicate role? This will duplicate the role along with object type permissions, and advanced options, where applic			
	Sel	ect one tivity			CANCEL	те	SSIONS X	

Duplicate Button