

Duplicating an Existing Role

Last Modified on 08/07/2024 1:32 pm EDT

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

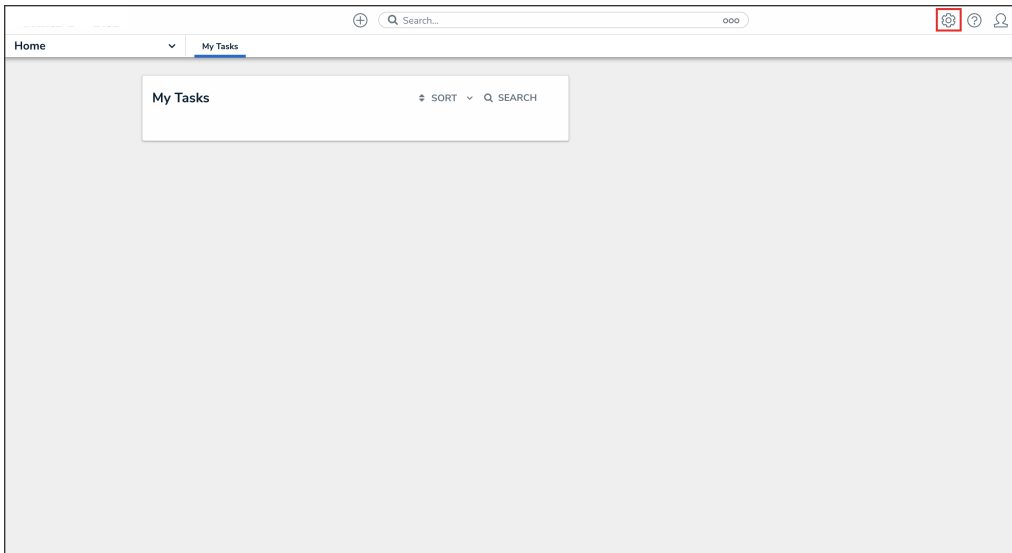
The user account used to log into Resolver must have Administrator permission to access the Roles section.

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.

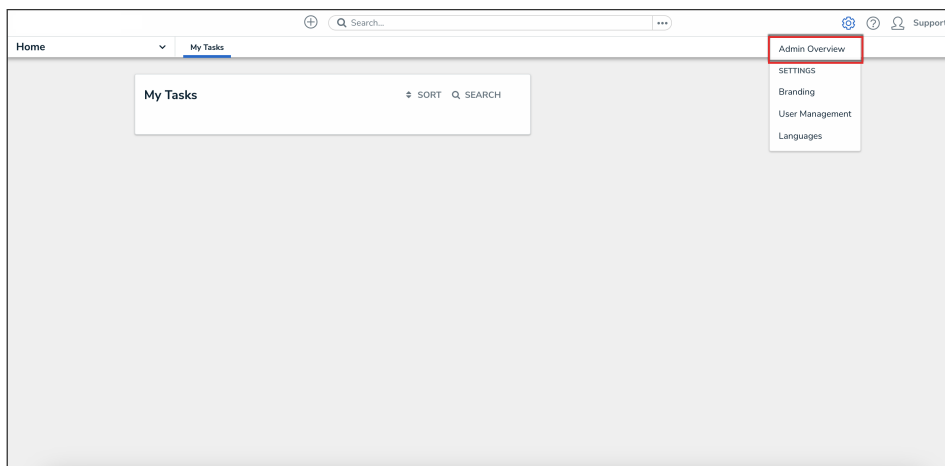
Navigation

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



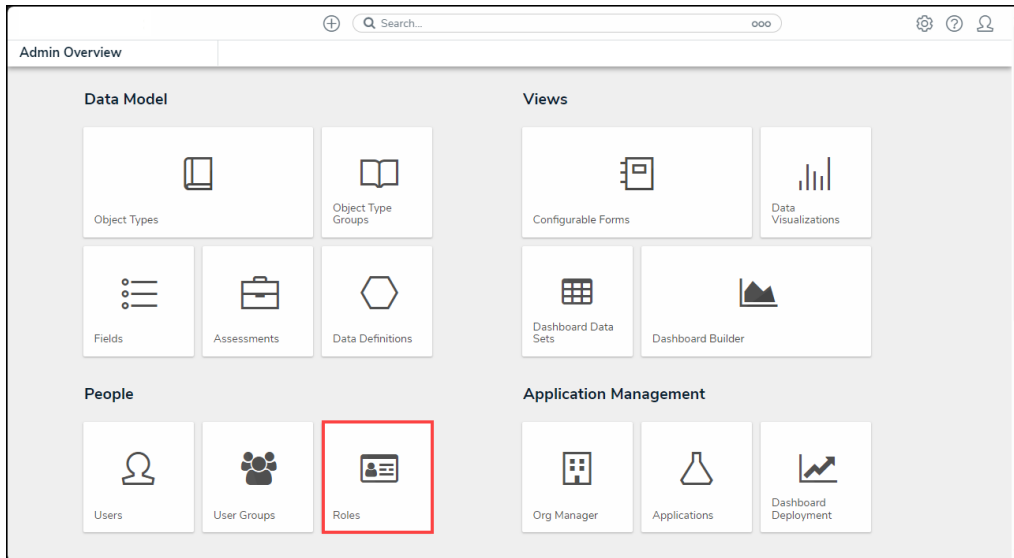
Administration Icon

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



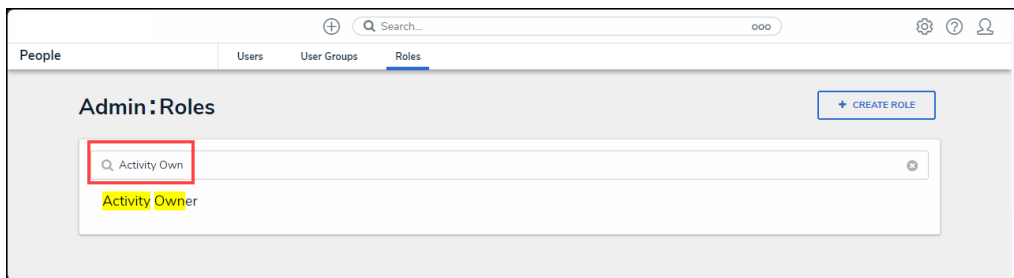
Administrator Settings Menu

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



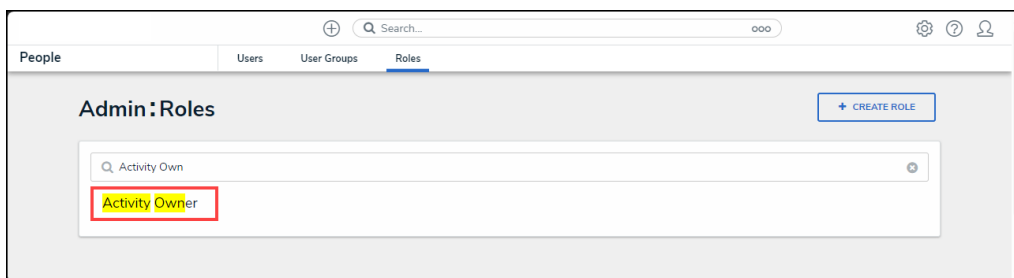
Roles Tile

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



Search Field

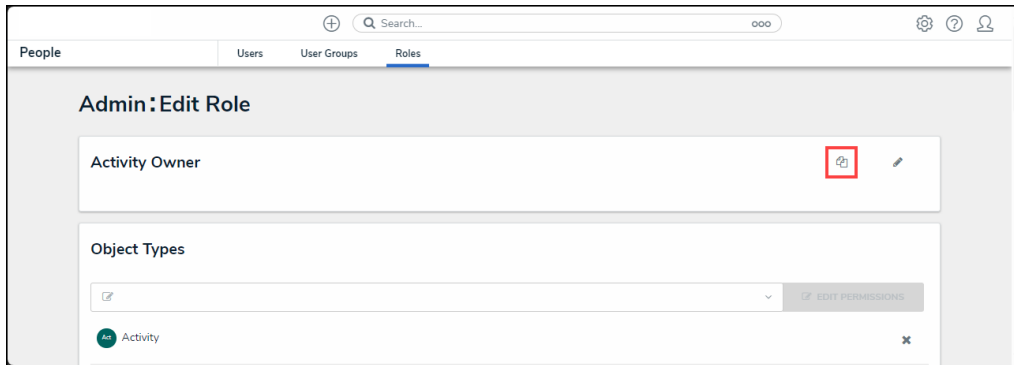
5. Click the **Role** that you want to duplicate.



Role Name

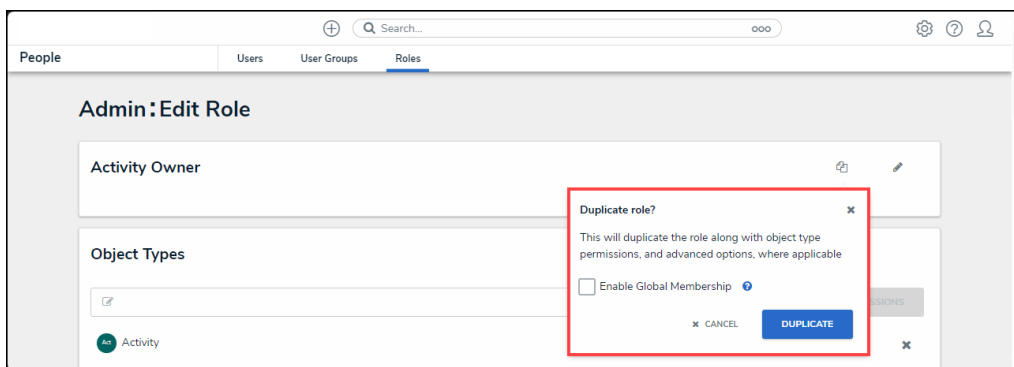
Creating a Duplicate Role

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



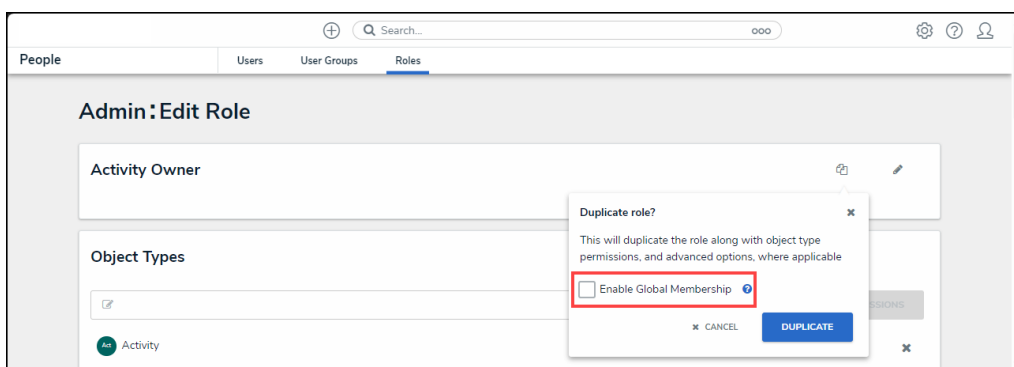
Duplicate Icon

2. The confirmation screen will appear.



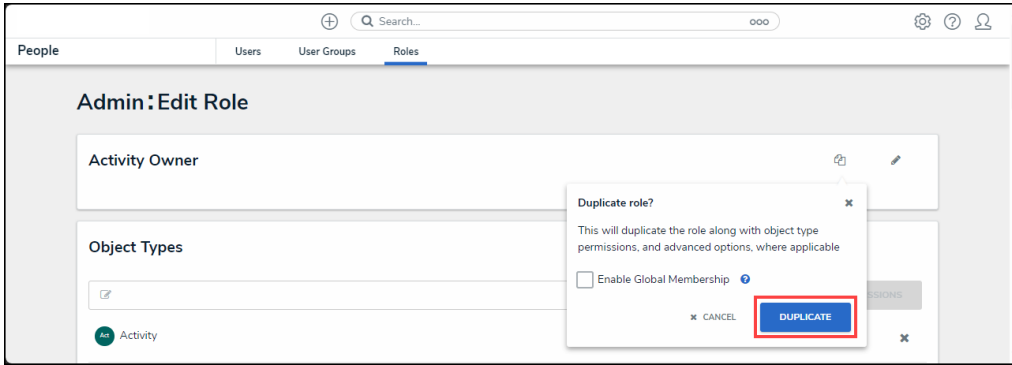
Confirmation Screen

3. **(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