

Copy Roles/User Profiles

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Overview

The Copy Roles/User Profiles utility allows the option to duplicate roles and users in datasets where they were not originally included. Copying roles from the current year dataset will ensure that all the users' corresponding roles will be available in the prior year datasets to which they are being copied. Copying users from the current year dataset will allow individual users to access prior year datasets where they were not originally included as users.

Setup

Copying Roles / User Profiles

1. To begin the process, log into the dataset from which is needing to be copied (the source dataset). The utility is found at *Hub / Utilities / Admin Utilities / Hub / Copy Roles/User Profiles*.
2. Choose the destination datasets. On the right side of the screen, double-click in the first available row and browse to the data folder to which is needing to be copied (the destination dataset).

Copy Roles/User Profiles

☐ Copy Roles from current dataset

How Many Roles: All Select Roles

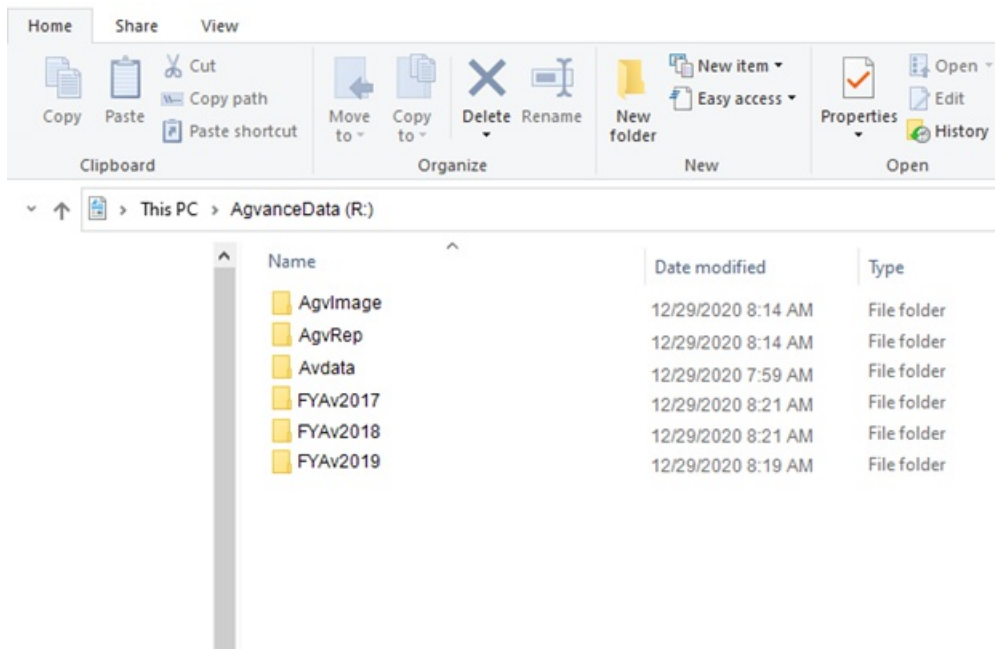
☐ Copy users from current dataset

How Many Users: All Select Users

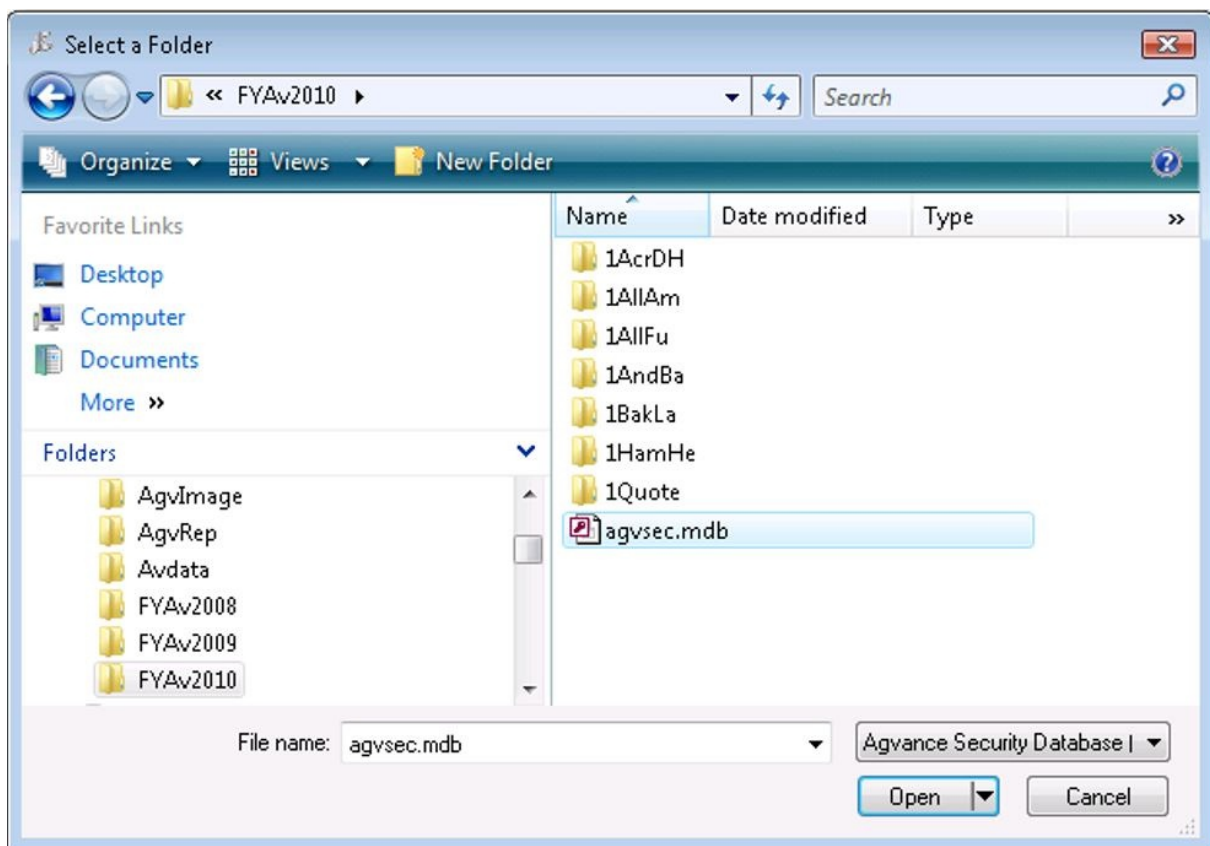
Copy Selected Roles and Users into the Datasets listed below

	<Data Folders>
1	
2	
3	
4	
5	
6	
7	
8	
9	

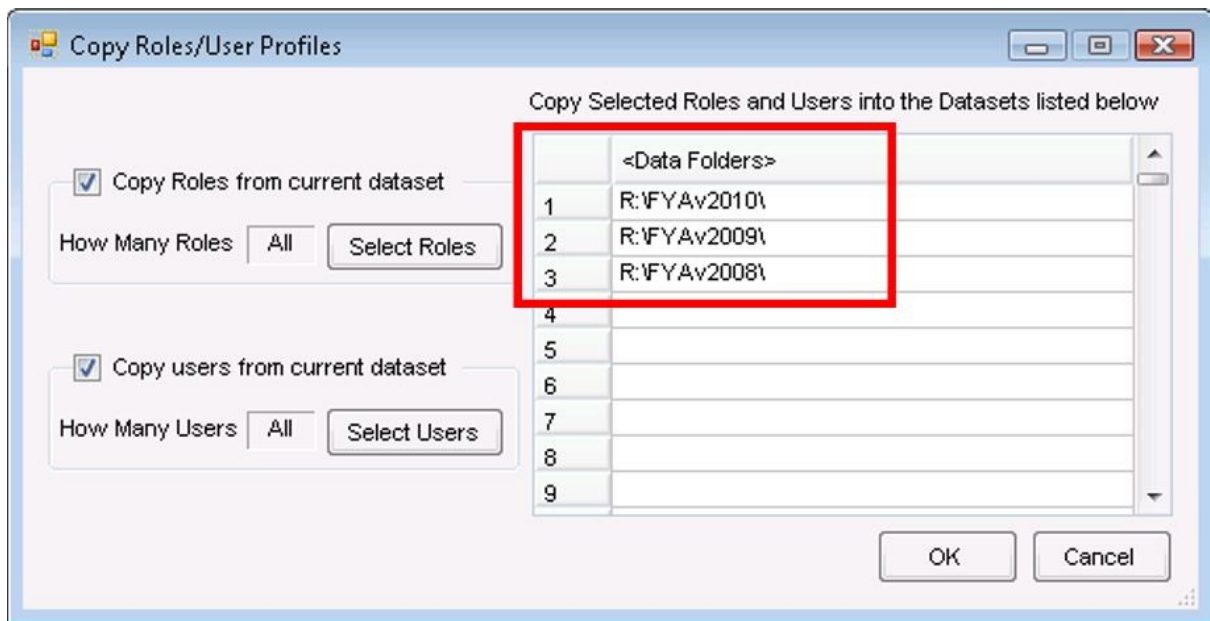
OK Cancel



Navigate to the drive letter that represents the server where the data is stored. Double-click on the destination data folder. If adding users to prior year datasets, these data folders will likely be named something like FYAv2020. Select the *agvsec.mdb* file, which is inside the data folder.



The line in the *Data Folders* field on the *Copy Roles/User Profiles* screen will display the data server drive letter and the name of the destination data folder. Optionally continue to add data folders to this column until all the datasets that needing to be copied into are included.



3. Upon selecting **OK**, Agvance will begin the process of copying roles and/or users into the selected datasets. The length of time it takes depends on how many roles and users needing to be copied as well as how many datasets being copied into. If a user or role already exists in a selected destination dataset, a message will appear asking to overwrite that role or user. Select **Yes** to overwrite the role/user with current year information. Select **No** to retain the information that already exists in that dataset.

Once the process is finished, a report will appear on the screen listing the changes made to each role and user in each dataset. Print the report for future reference.