

Duplicate User Group (W5)

[This version is superseded. Click here to view the latest guide.](#)

PURPOSE

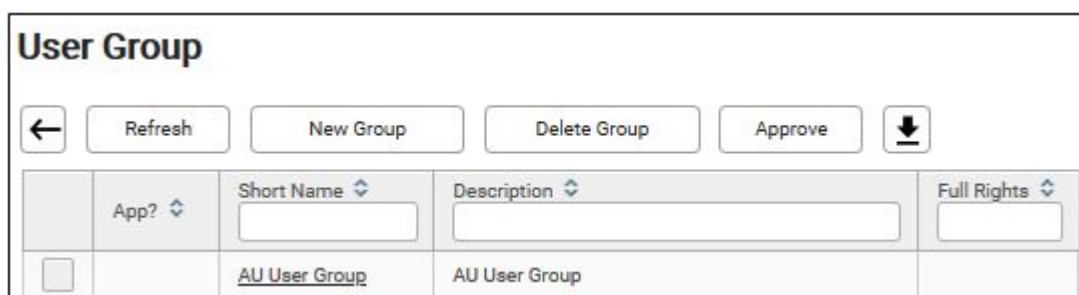
This document shows the detailed procedure on how to duplicate a user group.

WHY IS THIS IMPORTANT?

This allows duplication of user group and its permissions in a quick manner and saves user time.

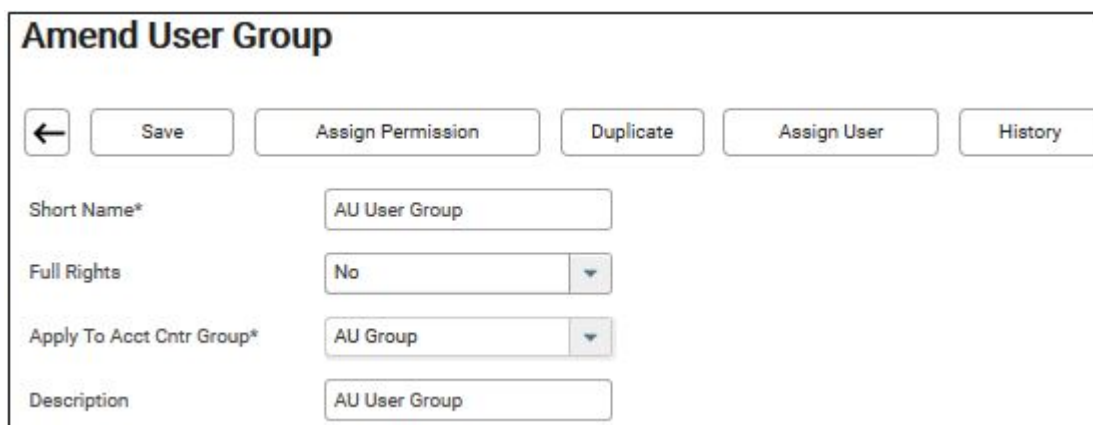
PROCEDURE

1. From the User Group screen, click on the short name of the user group to duplicate.



The screenshot shows the 'User Group' interface. At the top, there are buttons: a back arrow, 'Refresh', 'New Group', 'Delete Group', 'Approve', and a download icon. Below these is a table with columns: 'App?' (with a dropdown), 'Short Name' (with a dropdown), 'Description' (with a dropdown), and 'Full Rights' (with a dropdown). The table contains one row with a checkbox, an empty 'App?' field, 'AU User Group' in the 'Short Name' field, 'AU User Group' in the 'Description' field, and an empty 'Full Rights' field.

2. In this example, AU User Group will be duplicated. The Amend User Group menu will be displayed.



The screenshot shows the 'Amend User Group' interface. At the top, there are buttons: a back arrow, 'Save', 'Assign Permission', 'Duplicate', 'Assign User', and 'History'. Below these are four rows of form fields: 'Short Name*' with a text box containing 'AU User Group'; 'Full Rights' with a dropdown menu showing 'No'; 'Apply To Acct Cntr Group*' with a dropdown menu showing 'AU Group'; and 'Description' with a text box containing 'AU User Group'.

3. Click Duplicate. The User Group main screen will be displayed. The copied user group will have {1} beside its short name.

User Group

	App? ▾	Short Name ▾	Description ▾	Full Rights ▾
<input type="checkbox"/>	N	<u>AU User Group{1}</u>	AU User Group	
<input type="checkbox"/>		<u>AU User Group</u>	AU User Group	
<input type="checkbox"/>		<u>Approver</u>	Approver	
<input type="checkbox"/>		<u>FX Dealing Group</u>	FX Dealing Group	
<input type="checkbox"/>		<u>TFS User Group</u>	TFS User Group	Y
<input type="checkbox"/>		<u>UAGroup_dev</u>	UAGroup_dev	

4. Click the tick box beside the N to approve. Click Approve.

User Group

	App? ▾	Short Name ▾	Description ▾	Full Rights ▾
<input checked="" type="checkbox"/>	N	<u>AU User Group{1}</u>	AU User Group	
<input type="checkbox"/>		<u>AU User Group</u>	AU User Group	
<input type="checkbox"/>		<u>Approver</u>	Approver	
<input type="checkbox"/>		<u>FX Dealing Group</u>	FX Dealing Group	
<input type="checkbox"/>		<u>TFS User Group</u>	TFS User Group	Y
<input type="checkbox"/>		<u>UAGroup_dev</u>	UAGroup_dev	

5. A popup appears, click OK.

✕

⚠ Confirm approving selected item?

6. To amend the short name and change or assign accounting centre groups, click on the Short Name from the User Group screen and the Amend User Group will be displayed.

Amend User Group

←
Save
Assign Permission
Duplicate
Assign User
History

Short Name*

Full Rights

Apply To Acct Cntr Group*

Description

7. Change the Short Name and Acct Cntr Group.

Amend User Group

←
Save
Assign Permission
Duplicate
Assign User
History

Short Name*

Full Rights

Apply To Acct Cntr Group*

Description

8. Click Save. A popup appears, click OK.

⚠

Amending the user group will disable all the users associated with this group from accessing any functions in the system until the changes to the user group are approved by an authorised user. Do you want to continue?

OK
Cancel

9. Approve the amendment by clicking the tick box beside the N in App? and clicking Approve.

User Group

←
Refresh
New Group
Delete Group
Approve
⬇

	App? ⇅	Short Name ⇅	Description ⇅	Full Rights ⇅
<input checked="" type="checkbox"/>	N	<u>EU User Group</u>	EU User Group	
<input type="checkbox"/>		<u>AU User Group</u>	AU User Group	

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

[User Groups and Assigning Permission](#)

CHANGE HISTORY

Date	By	Changes
15-Feb-2008	-	Created
20-Mar-2017	Clarissa	Reformatted and rewritten.
27-Nov-2019	Lyra	Updated Screenshots.