

Creating and Assigning Roles

Module 8 – Data Sharing

Version 1.0

Table of Contents

1.	Roles.....	2
1.1	What is a Role?	2
1.2	When to use a Role.....	3
2.	Create a Role.....	3
2.1	Naming Conventions	3
3.	Assigning Roles.....	4
3.1	Apply a Role to a Field.....	4
3.2	Create a New Role Label.....	5
3.3	Adjust Roles Applied to Fields.....	5
3.4	Bulk Assign Roles.....	6
3.5	Bulk Unassign Roles.....	7
3.6	Example of Role Mapped Fields.....	8
4.	Managing Roles.....	9
5.	Generating Documents Using Roles.....	11
5.1	Assigning Roles when Generating Documents	12
5.1	Assigning Roles from Contacts.....	12
5.2	Assigning Roles to from Submissions.....	13

1. Roles

1.1 What is a Role?

A Role is a label that is used to group/categorise data. A Role is not limited to a party of the proceedings and can be used to label any collection of useful matter data, e.g.:

Matter Parties	Matter Details	General Details
<ul style="list-style-type: none">• Purchaser• Vendor• Applicant• Respondent• Children	<ul style="list-style-type: none">• Property Details• Transaction Details• Employment Details• Relationship Details	<ul style="list-style-type: none">• Bank Account Details• Superannuation Details

Roles are used in data sharing and allow previously entered data to be reused in other documents.

Roles work with section and field aliases to create a pathway to data so that the answer provided by a form filler has a unique identifier and can be stored, e.g. the pathway of data looks like:

Form >> Section >> Field >> Field Alias >> Role

If we apply that string to the example of the applicant's occupation, the pathway then becomes:

Application >> Applicant Details >> Occupation >> Occupation >> Applicant
FORM SECTION FIELD FIELD ALIAS ROLE

When building documents that use Roles, ensure all documents use the same alias and role to secure the connection. In this example, when a filler answers the Applicant's 'occupation' in the first document, that answer will be stored and reused in future documents where the applicant's occupation is required.

The labels of the form/section/field are irrelevant and will likely differ between documents – it's the field alias and role that need to perfectly match.

Note: Use section blocks to create reusable sections/fields with roles applied to reduce errors in assigning the correct aliases and roles.

1.2 When to use a Role

A Role is not mandatory and can only be applied to fields with a field alias. Use Roles when you identify a group of data that is related and reusable.

Applying a Role doesn't force you to use all of the fields in the group, it is simply a label and the connector for data sharing.

2. Create a Role

Only create Roles for genuine data groups and data that you want to reuse. There is no benefit to having a clutter of Roles that then become confusing and unmanageable.

Roles are assigned during the form building process. When you are assigning a Role, if it doesn't exist then you can create it (see 3 below).

2.1 Naming Conventions

Roles should describe the group of data being collected, e.g. purchaser details, vendor details, property details, transaction details. Refer to the organisation's best practice guidelines on the naming conventions that have been adopted for Roles.

Note: You need to ensure that Roles aren't duplicated as this will impact data sharing. If one form uses the Role **Child** and another uses **Children**, the Roles won't connect and so will prevent data sharing of information previously entered.

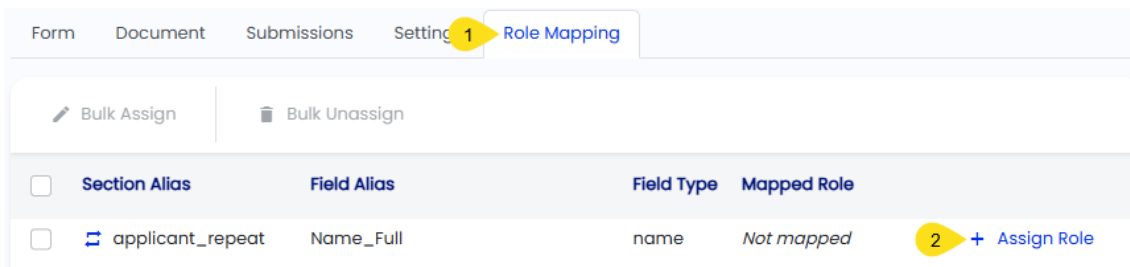
3. Assigning Roles

3.1 Apply a Role to a Field

Once you have created the sections/fields in your form or section block, you can then assign Roles.

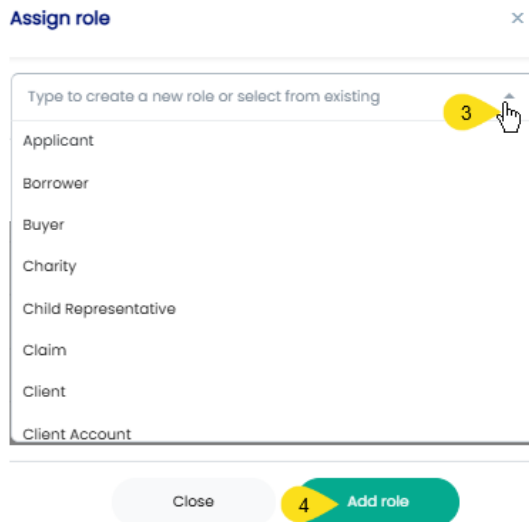
To assign a Role:

1. On the form/section block, click the **Role Mapping** tab.
2. Click **+ Assign Role**.



Section Alias	Field Alias	Field Type	Mapped Role
<input type="checkbox"/> applicant_repeat	Name_Full	name	Not mapped 2 + Assign Role

3. Click the drop-down and select the relevant Role.



Assign role [Close]

Type to create a new role or select from existing 3

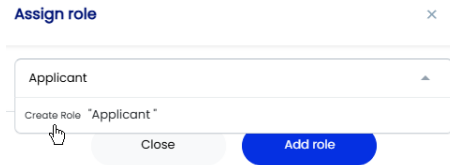
- Applicant
- Borrower
- Buyer
- Charity
- Child Representative
- Claim
- Client
- Client Account

[Close] 4 Add role

4. Click **Add role**.

3.2 Create a New Role Label

If the required Role doesn't exist, type the name of the Role and hit **Enter** or click **Create role**.



The 'Assign role' dialog box shows a search input with 'Applicant' entered. Below the input, there is a 'Create Role "Applicant"' option with a cursor icon. At the bottom, there are 'Close' and 'Add role' buttons.

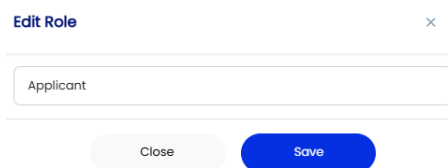
Click **Add role** to assign the Role to the field.

3.3 Adjust Roles Applied to Fields

To adjust Roles, click on the **Kebab** menu.

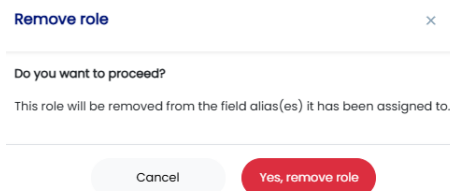
Bulk Assign		Bulk Unassign		
<input type="checkbox"/>	Section Alias	Field Alias	Field Type	Mapped Role
<input type="checkbox"/>	applicant_repeat	Name_Full	name	Applicant
<input type="checkbox"/>	applicant_repeat	Name_Given	text	Applicant
<input type="checkbox"/>	applicant_repeat	Address_Street	address	Applicant

1. **Edit role:** Change the assigned Role.
Select an alternate Role and save.



The 'Edit Role' dialog box shows a search input with 'Applicant' entered. At the bottom, there are 'Close' and 'Save' buttons.

2. **Unassign role:** Remove the Role.
Confirm removal of the Role.

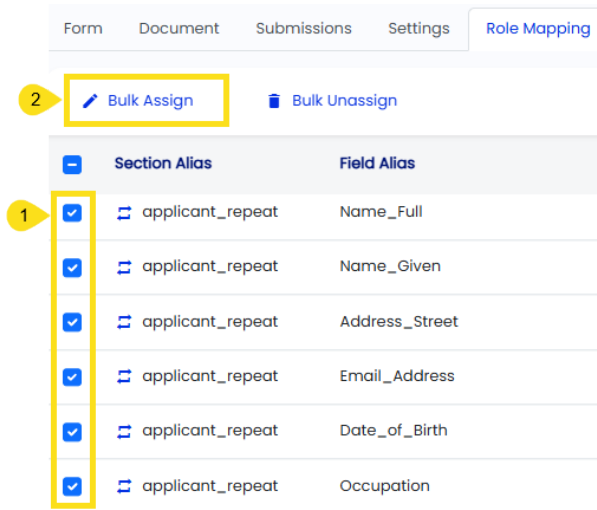


The 'Remove role' dialog box asks 'Do you want to proceed?' and states 'This role will be removed from the field alias(es) it has been assigned to.' At the bottom, there are 'Cancel' and 'Yes, remove role' buttons.

3.4 Bulk Assign Roles

To bulk assign Roles:

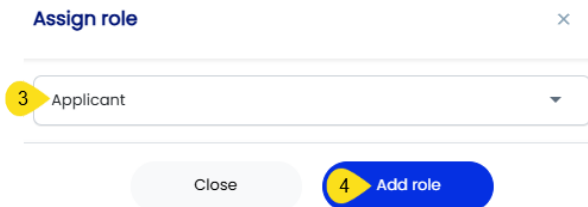
1. Click the checkboxes to select the relevant fields.
2. Click **Bulk Assign**.



The screenshot shows the 'Role Mapping' tab in the application. At the top, there are tabs for 'Form', 'Document', 'Submissions', 'Settings', and 'Role Mapping'. Below these tabs, there are two buttons: 'Bulk Assign' (highlighted with a yellow box and a yellow callout '2') and 'Bulk Unassign'. Below the buttons is a table with two columns: 'Section Alias' and 'Field Alias'. The table contains six rows, each with a checkbox in the first column, 'applicant_repeat' in the second column, and a field alias in the third column. The checkboxes are all checked, and the first checkbox is highlighted with a yellow box and a yellow callout '1'.

	Section Alias	Field Alias
<input checked="" type="checkbox"/>	applicant_repeat	Name_Full
<input checked="" type="checkbox"/>	applicant_repeat	Name_Given
<input checked="" type="checkbox"/>	applicant_repeat	Address_Street
<input checked="" type="checkbox"/>	applicant_repeat	Email_Address
<input checked="" type="checkbox"/>	applicant_repeat	Date_of_Birth
<input checked="" type="checkbox"/>	applicant_repeat	Occupation

3. Select the relevant Role.
4. Click **Add role**.

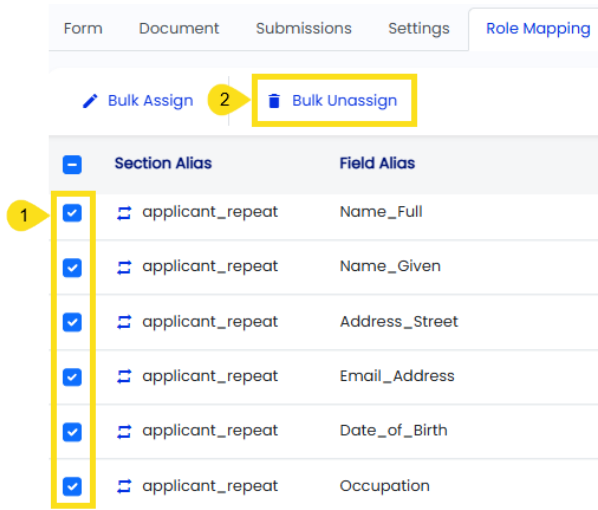


The screenshot shows the 'Assign role' dialog box. It has a title bar with 'Assign role' and a close button. Below the title bar is a dropdown menu with 'Applicant' selected. Below the dropdown menu are two buttons: 'Close' and 'Add role' (highlighted with a yellow box and a yellow callout '4').

3.5 Bulk Unassign Roles

To bulk unassign Roles:

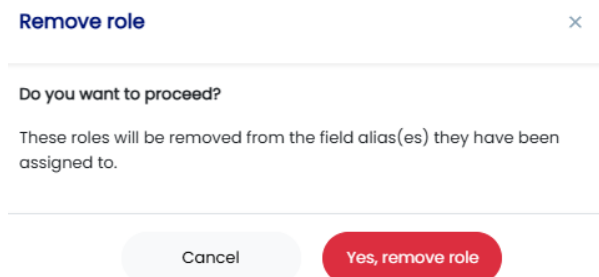
1. Click the checkboxes to select the relevant fields.
2. Click **Bulk Unassign**.



The screenshot shows the 'Role Mapping' tab in the application. At the top, there are tabs for 'Form', 'Document', 'Submissions', 'Settings', and 'Role Mapping'. Below these, there are two buttons: 'Bulk Assign' and 'Bulk Unassign'. The 'Bulk Unassign' button is highlighted with a yellow box and a yellow circle with the number '2'. Below the buttons is a table with two columns: 'Section Alias' and 'Field Alias'. The table contains six rows, each with a checkbox in the first column, a 'document' icon, the text 'applicant_repeat', and a field alias. The checkboxes are all checked, and the first checkbox is highlighted with a yellow box and a yellow circle with the number '1'. The field aliases are 'Name_Full', 'Name_Given', 'Address_Street', 'Email_Address', 'Date_of_Birth', and 'Occupation'.

	Section Alias	Field Alias
<input checked="" type="checkbox"/>	document applicant_repeat	Name_Full
<input checked="" type="checkbox"/>	document applicant_repeat	Name_Given
<input checked="" type="checkbox"/>	document applicant_repeat	Address_Street
<input checked="" type="checkbox"/>	document applicant_repeat	Email_Address
<input checked="" type="checkbox"/>	document applicant_repeat	Date_of_Birth
<input checked="" type="checkbox"/>	document applicant_repeat	Occupation

3. Confirm removal of the Roles.



The screenshot shows a 'Remove role' dialog box. At the top, it says 'Remove role' with a close button (X) on the right. Below this, it asks 'Do you want to proceed?'. Underneath, it states 'These roles will be removed from the field alias(es) they have been assigned to.' At the bottom, there are two buttons: 'Cancel' and 'Yes, remove role'.

Remove role ×


















Do you want to proceed?

These roles will be removed from the field alias(es) they have been assigned to.

Cancel Yes, remove role

3.6 Example of Role Mapped Fields

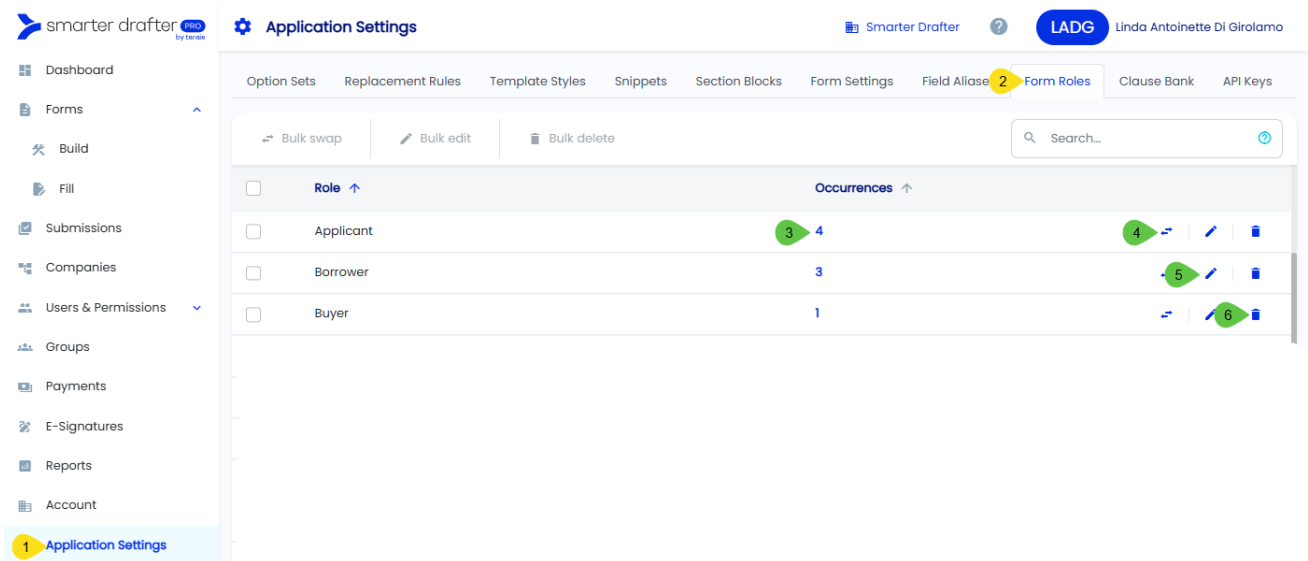
This is an example of a form that has had role mapping applied.

Form Document Submissions Settings Role Mapping				
<div>  Bulk Assign  Bulk Unassign </div>				
<input type="checkbox"/>	Section Alias	Field Alias	Field Type	Mapped Role
<input type="checkbox"/>	 applicant_repeat	Name_Full	name	Applicant
<input type="checkbox"/>	 applicant_repeat	Name_Given	text	Applicant
<input type="checkbox"/>	 applicant_repeat	Address_Street	address	Applicant
<input type="checkbox"/>	 applicant_repeat	Email_Address	email	Applicant
<input type="checkbox"/>	 applicant_repeat	Date_of_Birth	datetime	Applicant
<input type="checkbox"/>	 applicant_repeat	Occupation	text	Applicant
<input type="checkbox"/>	 respondent_repeat	Name_Full	name	Respondent
<input type="checkbox"/>	 respondent_repeat	Name_Given	text	Respondent
<input type="checkbox"/>	 respondent_repeat	Address_Street	address	Respondent
<input type="checkbox"/>	 respondent_repeat	Email_Address	email	Respondent
<input type="checkbox"/>	 respondent_repeat	Date_of_Birth	datetime	Respondent
<input type="checkbox"/>	 respondent_repeat	Occupation	text	Respondent
<input type="checkbox"/>	 child_repeat	Name_Full	name	Child
<input type="checkbox"/>	 child_repeat	Name_Given	text	Child
<input type="checkbox"/>	 child_repeat	Date_of_Birth	datetime	Child
<input type="checkbox"/>	relationship_details	Date_Cohabitation	datetime	Relationship Details
<input type="checkbox"/>	relationship_details	Date_Marriage	datetime	Relationship Details

4. Managing Roles

It is recommended that the list of Roles being used by your organisation is reviewed fortnightly so that any issues can be rectified. To access the Roles list:

1. Go to **Application Settings**.
2. Click on the **Form Roles** tab.



Application Settings

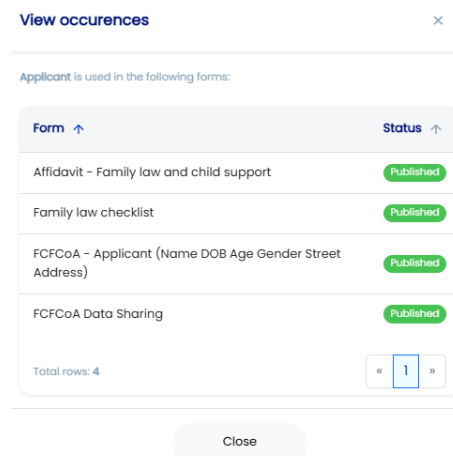
Option Sets Replacement Rules Template Styles Snippets Section Blocks Form Settings Field Aliases **Form Roles** Clause Bank API Keys

Bulk swap Bulk edit Bulk delete Search...

Role	Occurrences
Applicant	3
Borrower	3
Buyer	1

This is where you can review and manage the Roles that have been used.

3. **Occurrences:** Indicates how many sections/section blocks use the Role. Click on the number to see the list:



View occurrences

Applicant is used in the following forms:

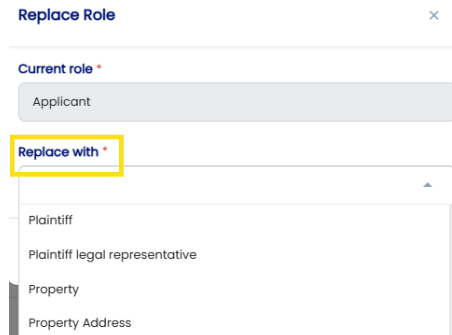
Form	Status
Affidavit - Family law and child support	Published
Family law checklist	Published
FCFCoA - Applicant (Name DOB Age Gender Street Address)	Published
FCFCoA Data Sharing	Published

Total rows: 4

« 1 »

Close

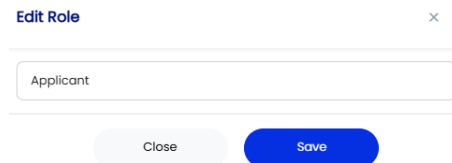
4. **Replace:** If a duplication is identified, you can replace the duplicate Role with the correct Role. Click on the replace icon next to the Role to be replaced and select the correct Role to use.



The 'Replace Role' dialog box shows the 'Current role' as 'Applicant'. Below it, the 'Replace with' dropdown menu is open, displaying a list of roles: 'Plaintiff', 'Plaintiff legal representative', 'Property', and 'Property Address'. The 'Replace with' label is highlighted with a yellow box.

Wherever the duplicate Role was used, the correct Role will automatically be applied and override the duplication.

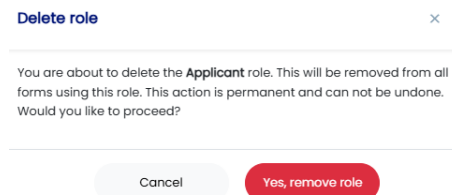
5. **Edit:** If a Role name needs to be adjusted, you can edit the name. Click on the pencil icon and adjust the name as required, then save.



The 'Edit Role' dialog box shows the current role name 'Applicant' in a text input field. Below the input field are two buttons: 'Close' and 'Save'.

Wherever the Role has been used, the name will be adjusted.

6. **Delete:** If a Role is not required, you can delete it. If you delete a Role that is in use, it will be removed from all fields that have used it and those fields will no longer have a Role. It is recommended to run a replace first (see above) if the relevant fields require a Role, before deleting it. Click on the bin icon and confirm deletion of the Role.



The 'Delete role' dialog box displays a warning message: 'You are about to delete the **Applicant** role. This will be removed from all forms using this role. This action is permanent and can not be undone. Would you like to proceed?'. At the bottom, there are two buttons: 'Cancel' and 'Yes, remove role'.

5. Generating Documents Using Roles

When a builder applies Roles in a form, the **Document Roles** section will be displayed to the form filler.

FCFCoA Data Sharing

ISD TEAM WORKING FOLDER > Linda

Matter Details

Smarter Drafter

00003

Clients (optional)

Barney John Rubble - Individual

+ Add client

Submission Name *

FCFCoA Data Sharing

Document Roles

Click the add button to assign a contact, use data from a previous submission and/or map from your matter.

Role	Assignee(s)
Court_FCFCoA	+ Add Assignee
Applicant Can assign more than one (max 2)	+ Add Assignee
Respondent Can assign more than one (max 2)	+ Add Assignee
Child Can assign more than one (max 6)	+ Add Assignee
Relationship Details	+ Add Assignee

Total rows: 5

1

Cancel

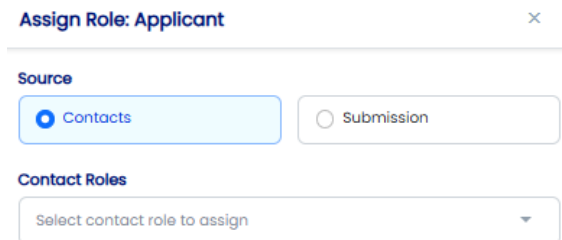
Start Form Now

It is not mandatory for the form filler to add the assignees. If they start the form without adding the assignees, they will complete the answers and process the document like any other form.

5.1 Assigning Roles when Generating Documents

To assign a Role, click the **+ Add Assignee**.

You will be able to assign a Role either from the Contacts address book or a previous submission.



Assign Role: Applicant ×

Source

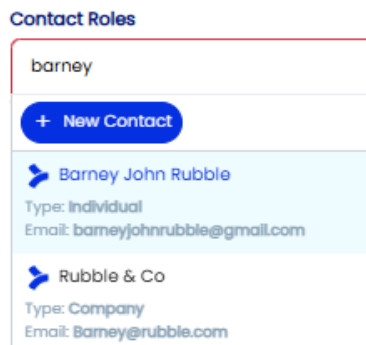
☒ Contacts ☐ Submission

Contact Roles

Select contact role to assign ▼

5.1 Assigning Roles from Contacts


If you select **Contacts**, you will be prompted to select a contact or create a new one.




Contact Roles

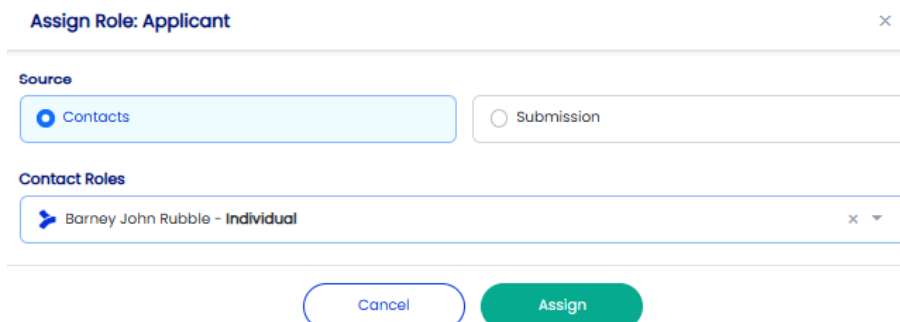
barney

+ New Contact

 **Barney John Rubble**
Type: Individual
Email: barneyjohnrubble@gmail.com

 **Rubble & Co**
Type: Company
Email: Barney@rubble.com

Once you have selected a contact, click **Assign**.




Assign Role: Applicant ×

Source

☒ Contacts ☐ Submission

Contact Roles

 **Barney John Rubble - Individual** × ▼

Cancel **Assign**

You will see that the selected contact has been assigned to the Applicant. In the example below, another Applicant can be assigned as the repeat on the Applicant has been allowed up to 2.

Document Roles

Click the add button to assign a contact, use data from a previous submission and/or map from your matter.

Role	Assignee(s)
Court_FCFCoA	+ Add Assignee
Applicant Can assign more than one (max 2)	<div>X Barney John Rubble (contact)</div> <div>+ Add Assignee</div>

5.2 Assigning Roles from Submissions

If you select Submission, you will be prompted to search and select a previously generated submission.

Submission

fcfcoa

FCFCoA Data Sharing
Status: Started
Submitted By: Linda Antoinette Di Girolamo
Submitted On: 6 Jun 2025 2:10 PM

Selected a submission and then select the Role that you want to connect.

Submission

FCFCoA Data Sharing

Submission Roles

Select submission role to assign

Court_FCFCoA
Applicant
Respondent
Child
Relationship Details

The connection will then be made to the Role in the previous submission. In this instance, the repeat allows for up to 6 children, however the connection will bring in however many children were used in the selected submission.

Child Can assign more than one (max 6)	<div>X Child (submission)</div> <div>+ Add Assignee</div>
---	---

Once the required roles have been assigned, click **Start Form Now**.

Document Roles

Click the add button to assign a contact, use data from a previous submission and/or map from your matter.

Role	Assignee(s)
Court_FCFCoA	✕ Federal Circuit and Family Court of Australia (contact)
Applicant Can assign more than one (max 2)	✕ Barney John Rubble (contact) + Add Assignee
Respondent Can assign more than one (max 2)	✕ Respondent (submission) + Add Assignee
Child Can assign more than one (max 6)	✕ Child (submission) + Add Assignee
Relationship Details	✕ Relationship Details (submission)

Total rows: 5

« 1 »

[Cancel](#) [Start Form Now](#)

The form will commence and all role mapped data will automatically be populated from the selected contacts/submissions.