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Creating and Assigning Roles

Module 8 – Data Sharing

Version 1.0

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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
• Purchaser • Vendor • Applicant • Respondent • Children	• Property Details • Transaction Details • Employment Details • Relationship Details	• 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.

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3. Assigning Roles

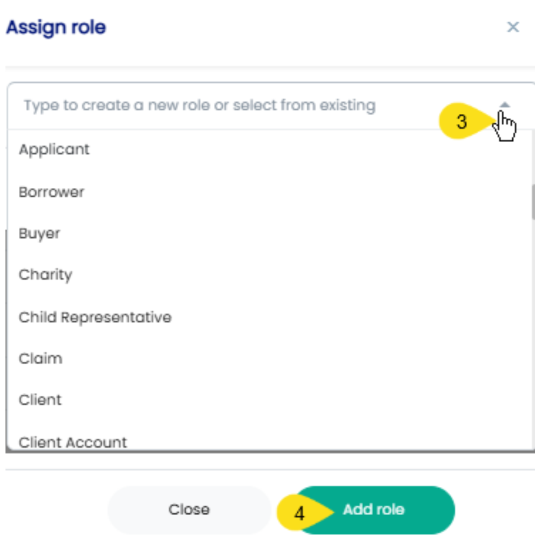
3.1 Apply a Role to a Field

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**.

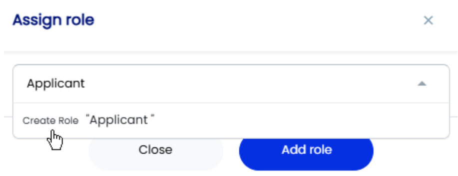
3. Click the drop-down and select the relevant Role.



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**.

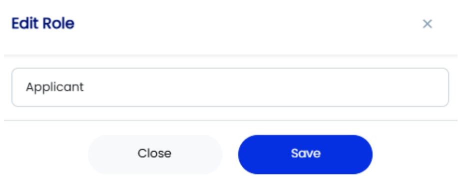


Click **Add role** to assign the Role to the field.

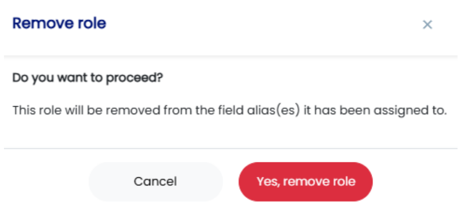
3.3 Adjust Roles Applied to Fields

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

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



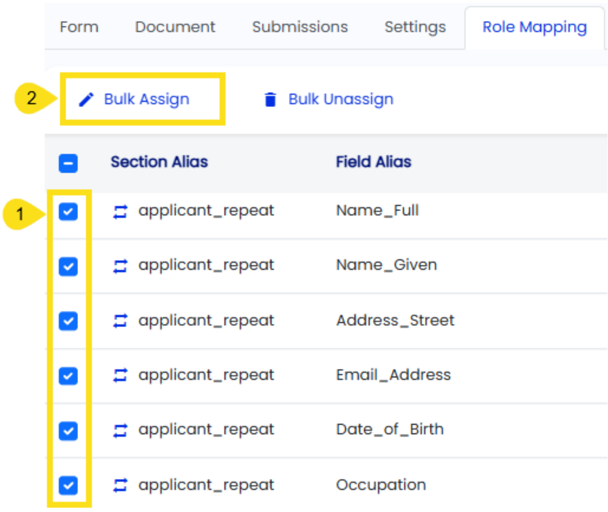
2. **Unassign role:** Remove the Role.
   Confirm removal of the Role.



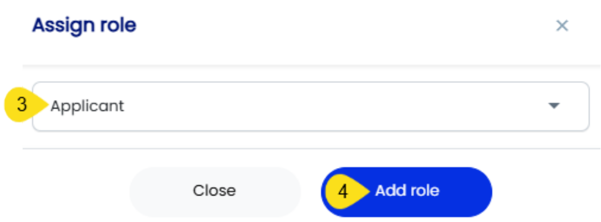
3.4 Bulk Assign Roles

To bulk assign Roles:

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



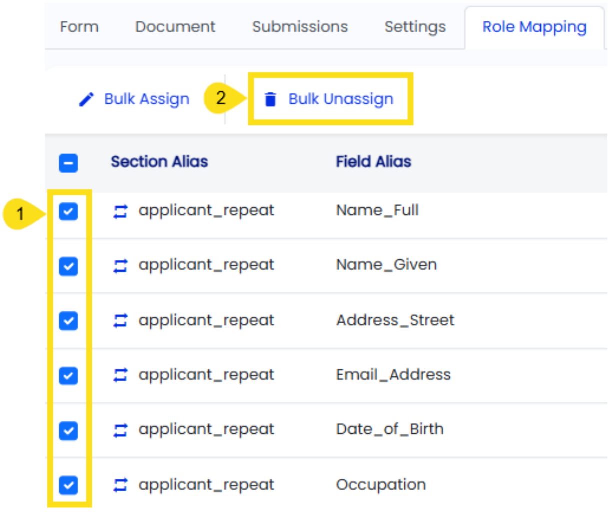
3. Select the relevant Role.
4. Click **Add role**.



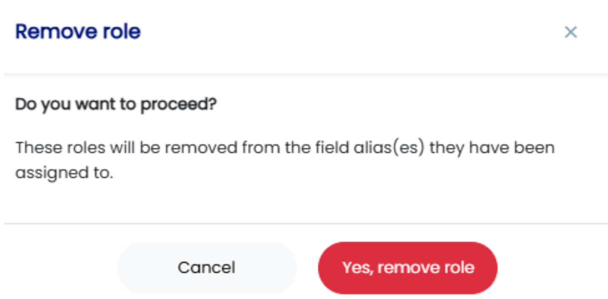
3.5 Bulk Unassign Roles

To bulk unassign Roles:

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



3. Confirm removal of the Roles.



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

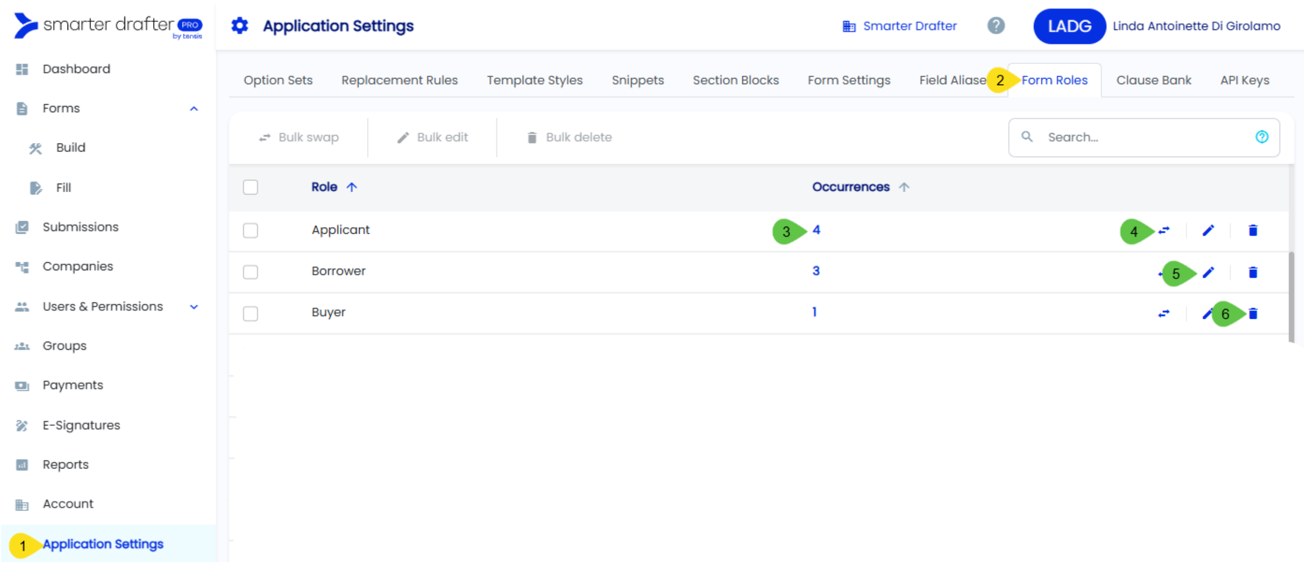
Bulk Assign | Bulk Unassign

Section Alias	Field Alias	Field Type	Mapped Role
applicant_repeat	Name_Full	name	Applicant
applicant_repeat	Name_Given	text	Applicant
applicant_repeat	Address_Street	address	Applicant
applicant_repeat	Email_Address	email	Applicant
applicant_repeat	Date_of_Birth	datetime	Applicant
applicant_repeat	Occupation	text	Applicant
respondent_repeat	Name_Full	name	Respondent
respondent_repeat	Name_Given	text	Respondent
respondent_repeat	Address_Street	address	Respondent
respondent_repeat	Email_Address	email	Respondent
respondent_repeat	Date_of_Birth	datetime	Respondent
respondent_repeat	Occupation	text	Respondent
child_repeat	Name_Full	name	Child
child_repeat	Name_Given	text	Child
child_repeat	Date_of_Birth	datetime	Child
relationship_details	Date_Cohabitation	datetime	Relationship Details
relationship_details	Date_Marriage	datetime	Relationship Details

4. Managing Roles

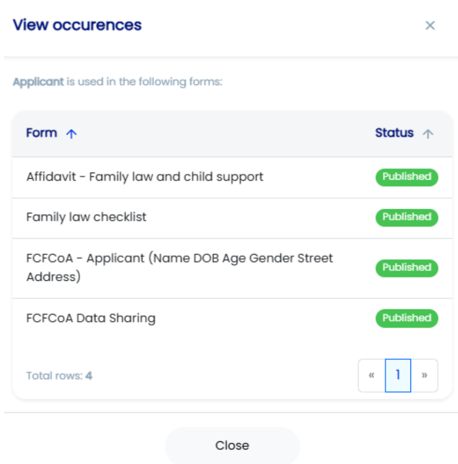
It is recommended that the list of Roles being used by your organisation is reviewed fortnightly so that any issues can be rectified. To access the Roles list:

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

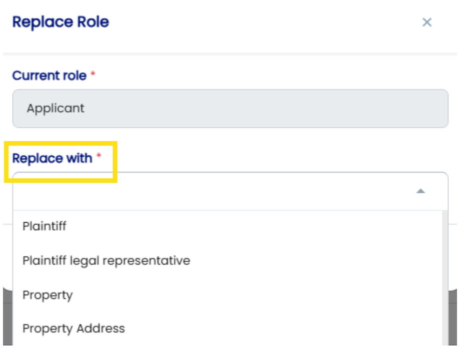


This is where you can review and manage the Roles that have been used.

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

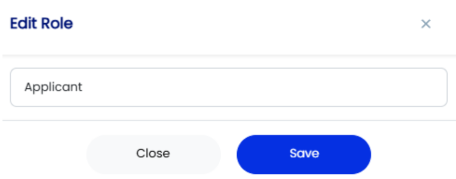


4. Replace: If a duplication is identified, you can replace the duplicate Role with the correct Role. Click on the replace icon next to the Role to be replaced and select the correct Role to use.



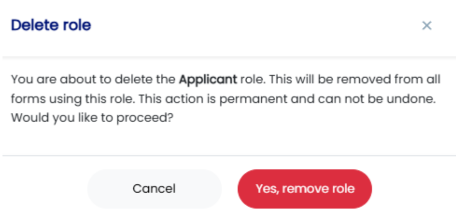
Wherever the duplicate Role was used, the correct Role will automatically be applied and override the duplication.

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.



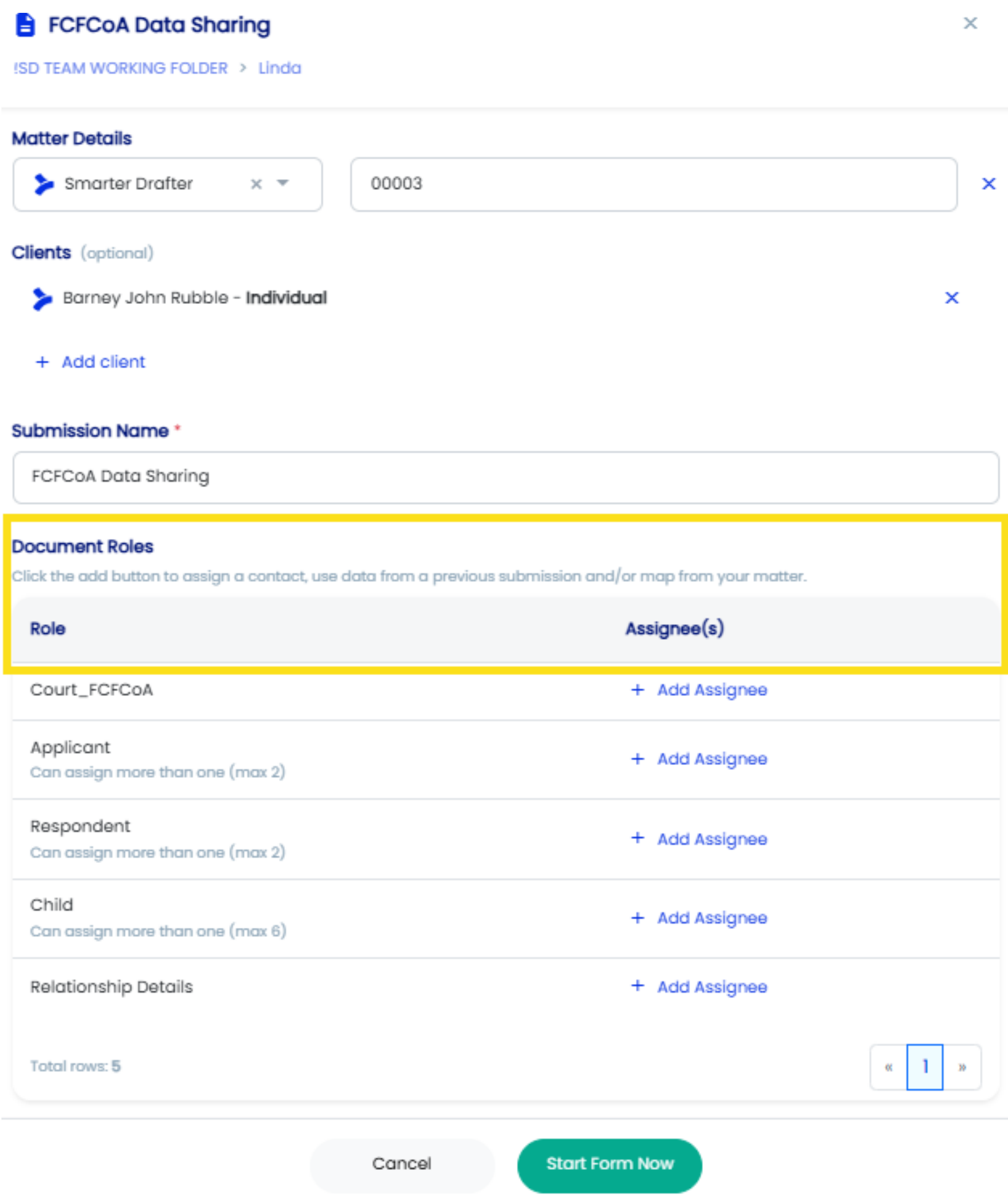
Wherever the Role has been used, the name will be adjusted.

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.



5. Generating Documents Using Roles

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

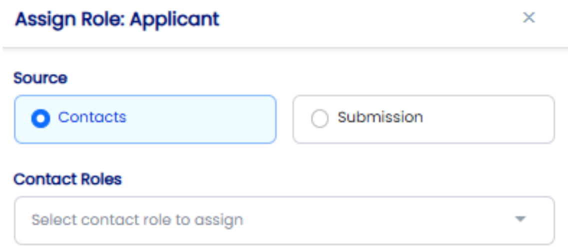


It is not mandatory for the form filler to add the assignees. If they start the form without adding the assignees, they will complete the answers and process the document like any other form.

5.1 Assigning Roles when Generating Documents

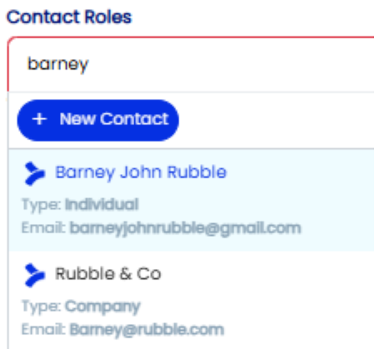
To assign a Role, click the **+ Add Assignee**.

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

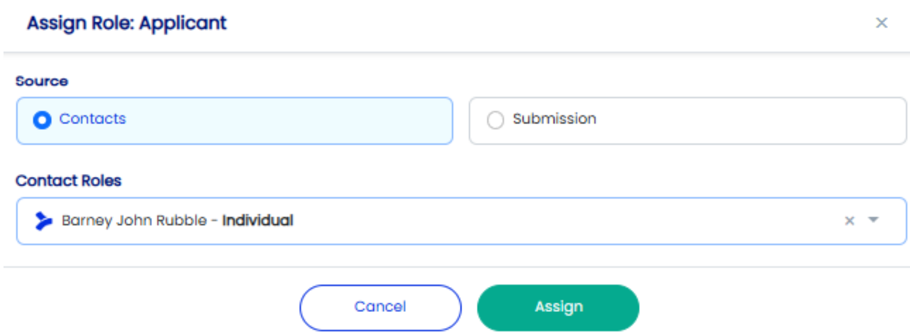


5.1 Assigning Roles from Contacts

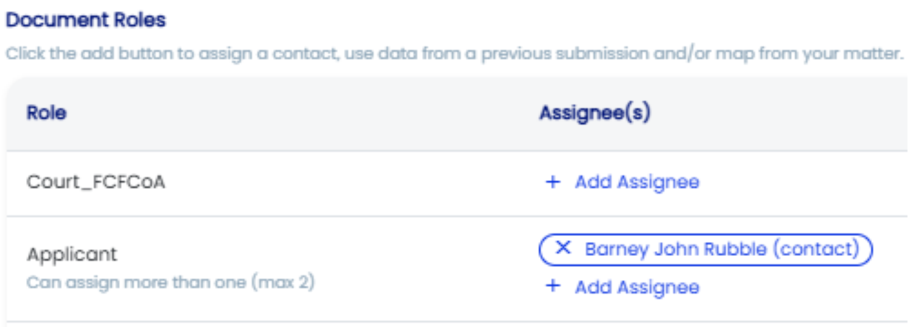
If you select **Contacts**, you will be prompted to select a contact or create a new one.



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

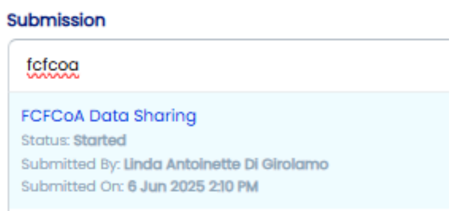


You will see that the selected contact has been assigned to the Applicant. In the example below, another Applicant can be assigned as the repeat on the Applicant has been allowed up to 2.



5.2 Assigning Roles from Submissions

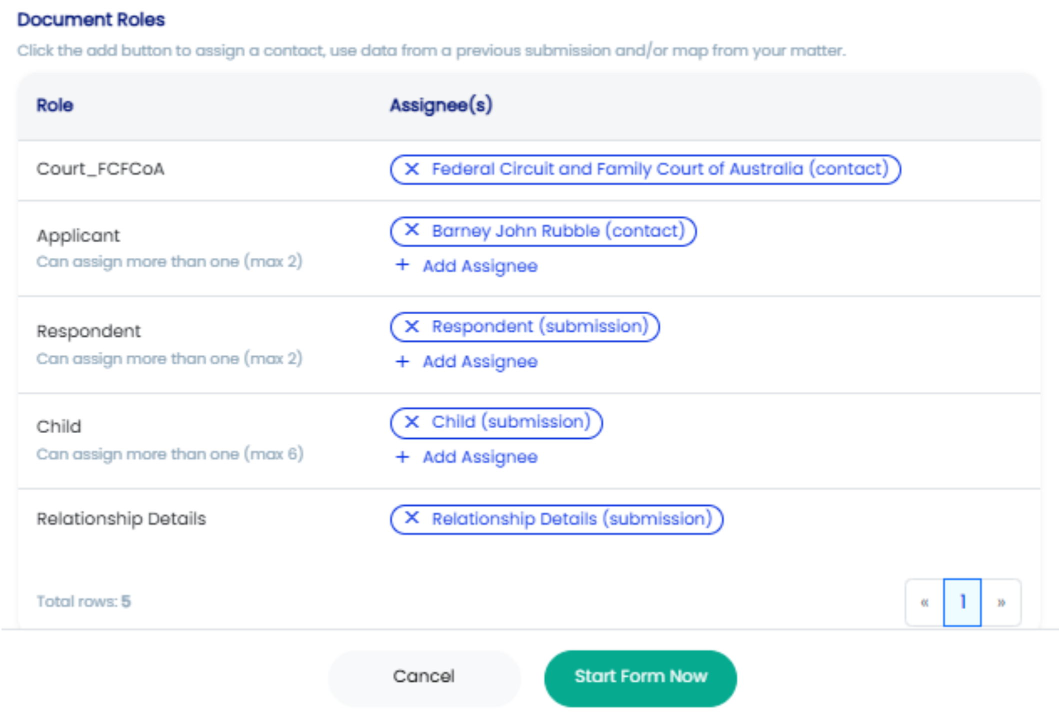
If you select Submission, you will be prompted to search and select a previously generated submission.



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

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.

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



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