

IP7 - Assigning and maintaining departmental roles

Within CoreHR is the ability to assign specific roles to individuals within a department e.g. Head of Department, Departmental Administrator etc. This will link them into any central, automatically generated mailing lists, including via use of generic e-mail addresses if preferred e.g. administrator@department. For central mailing lists to remain up to date and role holders to be properly informed, it is essential that these 'role' details are accurately maintained.

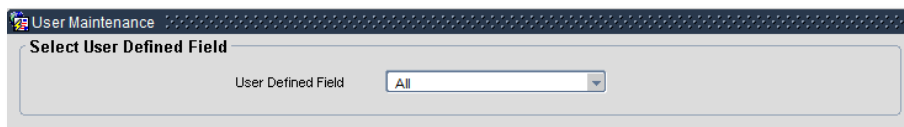
This guide covers the following process steps:

- To assign a role for first time..... 1
- To amend a role 2

Navigate to: Personnel > Maintenance > Personal Profile

To assign a role for first time


1. Search for and open the employee record and go to **Select Details** box > **Other Person Details**. The *User Maintenance* window opens.



2. Click to display **User Defined Field** List of Values.
3. Select **Roles within Department** from the list.

4. Click .

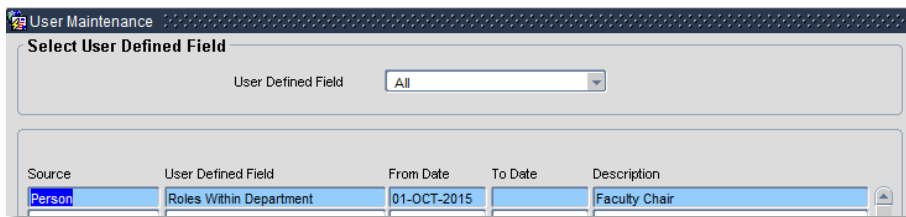
5. Complete the relevant details:

Field Name	Description
Date From*	Enter the start date of the role assignment.
Date To 	Leave blank. You will need to enter an end date at the end of the role assignment where this is for a fixed period.
Role	Select role as required.
Dept.	Select relevant department from the appropriate Divisional listing, or Division if it is a divisional role.
Generic email	Enter if required.

6. Click , then  and .

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To amend a role




User Maintenance

Select User Defined Field

User Defined Field: All

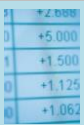
Source	User Defined Field	From Date	To Date	Description
Person	Roles Within Department	01-OCT-2015		Faculty Chair

View/Edit

1. Select the Roles Within Department line and click .
2. Follow steps 5-8 as above, changing details as required.



When a role is allocated to someone new, it may also be necessary to end date the role (by completing **Date To**) for another employee. Where relevant, as identified by the Employee Roles report, the generic migrated *1 Jan 1900* date can be changed (by amending **Date From**).



+	2.000
+	5.000
+	1.500
+	1.125
+	1.062

Useful Reports

To help track role holders don't forget to check via:
PERDEP05_Employee Roles