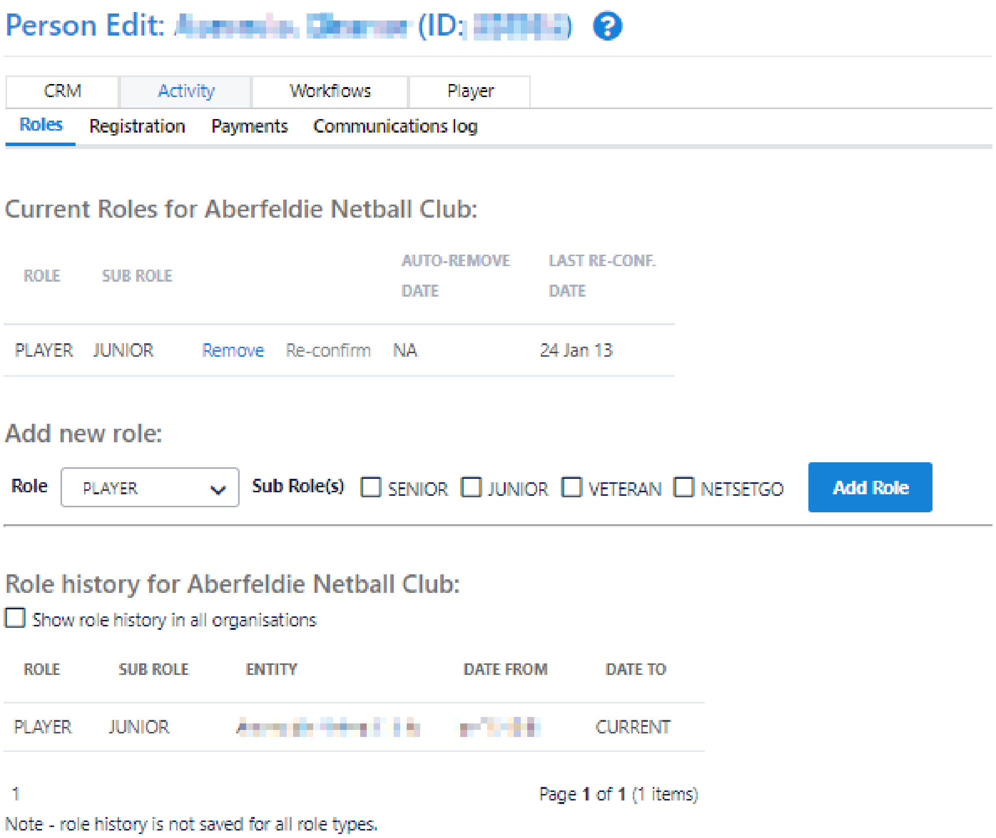
Assigning person roles

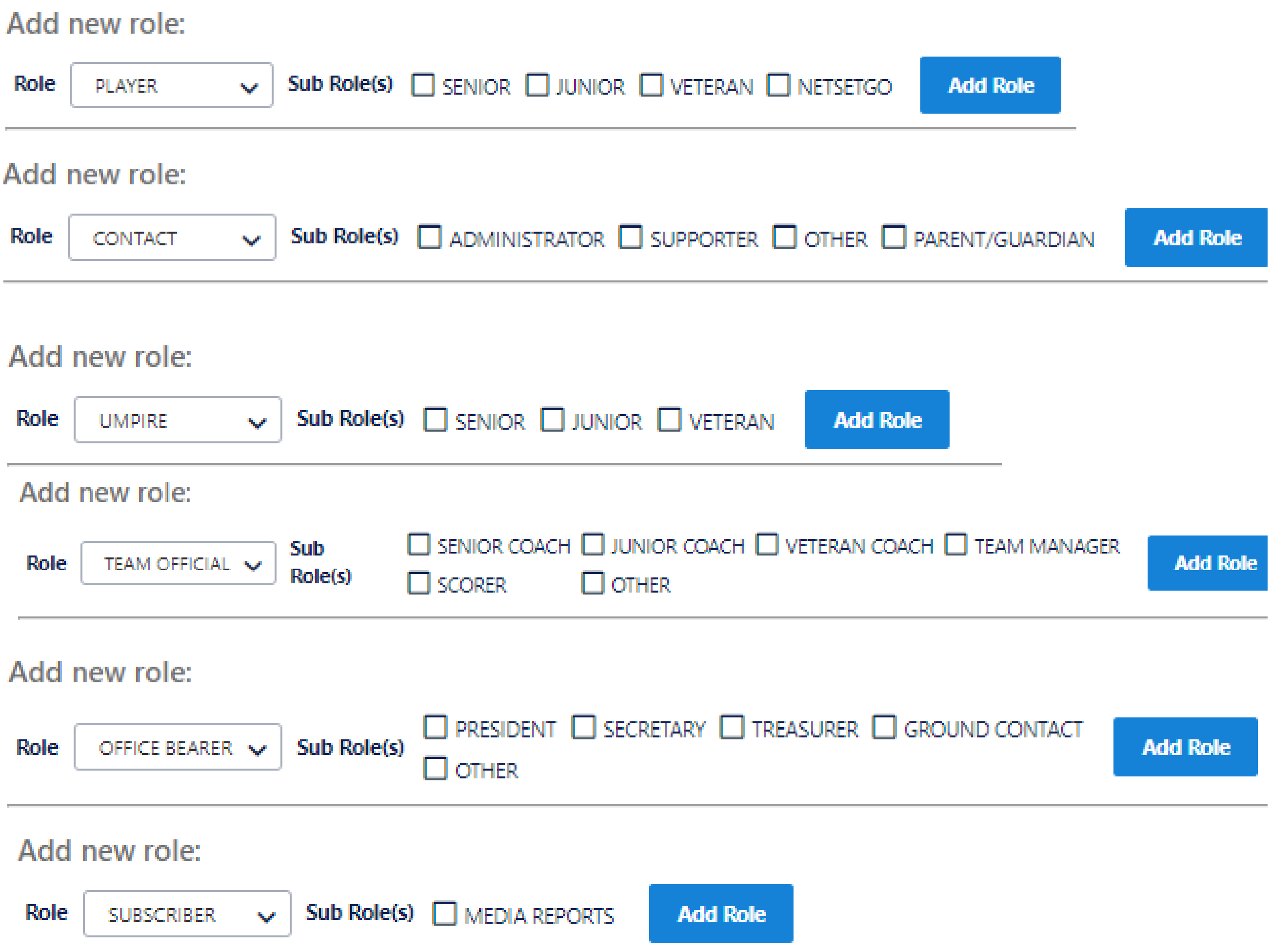
Each Person record can be assigned Roles within the system. By default, a Person record is not assigned to any Roles.

1. Find a Person on the **Searching Person Record** screen, using the **Using Person List (within ResultsVault Admin)** option.
2. Double-click the Person record to display the Person record details.
3. Select the Roles option at the top of the Person record screen.



Add new Roles as required, by selecting a Role and Sub Role(s) as required and clicking the **Add Role** link.

Each new Role will have several **Sub Role(s)** options, as shown below.



Each new Role will have several Sub Role(s) options, as shown below.

> ⚠ You should not add a role where a clearance is required.
>
> For example, there could be a situation where a past player has played at another club, and now requires a clearance to return to your club. Rather than adding back the role here, you should apply for a Clearance, whereby the role is added back once the Clearance is approved.
>
> If you are adding a Role back to a person with no current roles, and this person has been marked as not editable then adding a Role causes the record to enter a 'provisional' state (similar to records just transferred into your organisation). The record will not be editable or available for viewing for a period of 5 days by your organisation. The person will also be notified that this change has taken place.

Manage the Roles for a Person under the **Current Roles for..**. section.

The current roles within the current organisation are listed in the current roles table, with each Role/Sub-Role combination listed on a new line.

For example, if a person has both SENIOR and JUNIOR Sub-Roles of the PLAYER Role, there would be two entries in this table: PLAYER SENIOR and PLAYER JUNIOR.

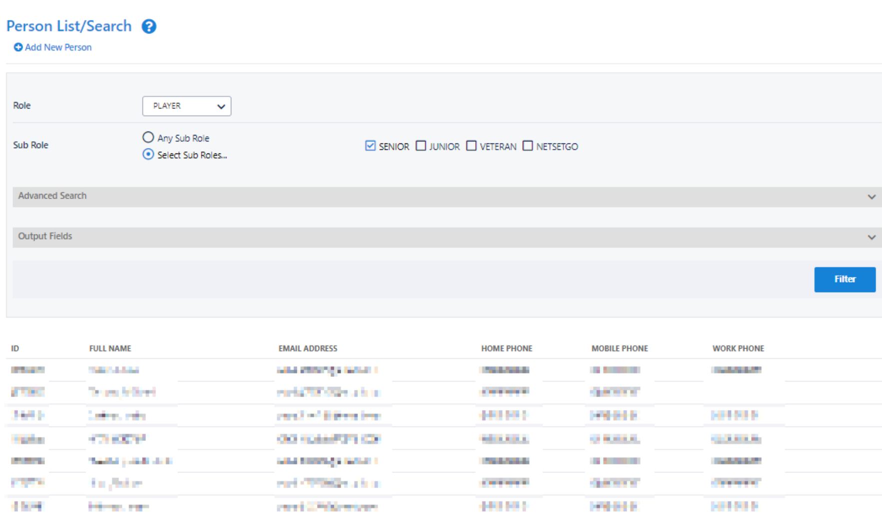
> ⚠ Roles that a person may have at another organisation will not be listed in this table.

If a person has no current roles within the organisation, then the **Last Sub-Role held** is displayed within a dropdown list. This refers to the last Sub-Role that was removed from the person record in this organisation, prior to there being no current roles assigned. The **Last Sub-Role** is only used as a search criteria in, for example, person lists when **NO ROLES** is selected. **Last Sub-Role** does not affect any prior role history. If it is incorrect, it can be changed by making a new selection in the dropdown list and clicking the **Update** link.

Remove Roles	Click the **Remove** link of the Role/Sub-Role combination within the Current Roles table, and click **OK** in the confirmation box. This will immediately remove the Role/Sub-Role, and if applicable will update the Role History. Removing all PLAYER roles will mean the person cannot be selected in teams, and removing all UMPIRE /REFEREE roles will mean the person cannot be allocated to matches. However, removing a role will not affect any past data for the person (e.g. matches played etc).
Reconfirm roles	To re-confim a role, click the **Re-confirm** link of the Role/Sub-Role combination within the Current Roles table. If applicable, roles for a single person can be re-confirmed here, although these would normally be done in bulk. If the role requires reconfirmation, then the *Re-confirm* link will be enabled, and the Auto remove date (which is the date on which the system will automatically remove the role if it is not re-confirmed beforehand) is listed. If NA displays, it means the role is not currently scheduled to be removed at any time in the future. The date that the role was last re-confirmed (if any) is also displayed.
Role History	The system records the history of changes to most roles (CONTACTS is an exception, history is not recorded). For each period where a Role/Sub-Role was held, a row will appear in the Role History table. Current roles will display as CURRENT in the Date To column. You can also see role histories in other organisations by checking the Show role history in all organisations checkbox.

On the Reconfirm / Change Person Roles screen, select **Display All** for one of the Roles in the Role Summary and follow the three steps:

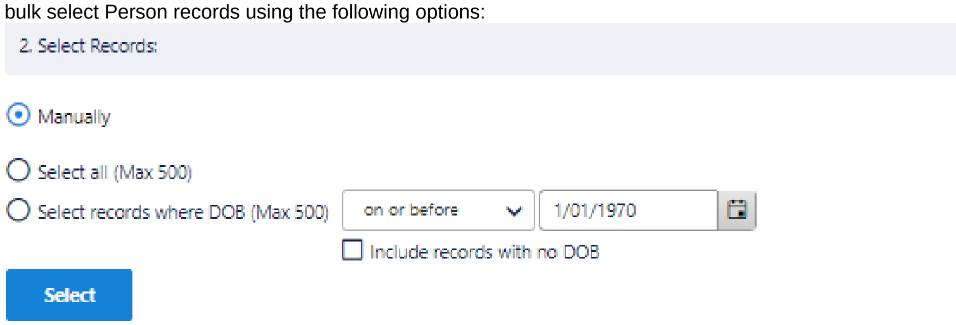
The Person List will display with a list of Person Records for the Role selected:



If you select **NO ROLE** from the Role Summary table, and records are found that are marked as not editable (normally this would be done by the person logging in as a participant, and clearing the editable flag for your organisation), these records cannot be selected to add Roles back into. In those cases you will need to access the records individually via the Person List, and add the Role via the Roles tab. This triggers notifications to the person that the record has changed, and puts the record into a provisional state for a period of time. For more information see the online help for the Person Edit (Roles) screen.

You can either:

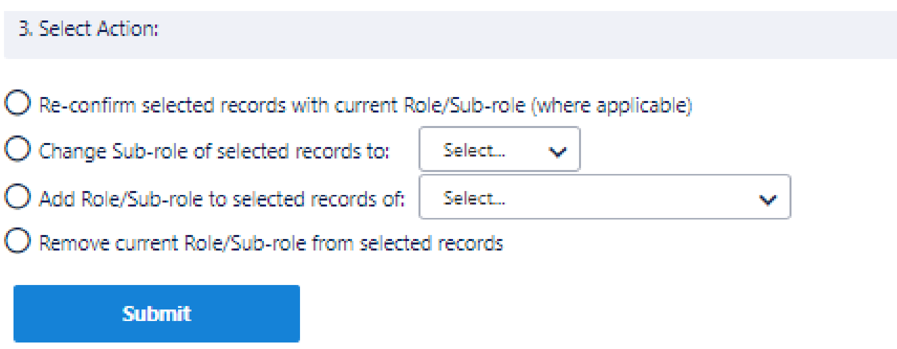
1. individually select Person records from the Person List by checking the **Select** checkbox for each record, or
2. bulk select Person records using the following options:



- Click **Select all** radio button and then click the **Select** button to Select all records in the Person List; or
- Click **Select records where DOB,** make a selection from the dropdown, then enter a date and click the **Select** button.
  For example, selecting DOB on or before 1/1/1980 will select all records that have a date of birth earlier (or on) the 1st January 1980.

  By default, records that have no DOB entered are not selected. To include these records, check the **Include records with no DOB** checkbox.

Once the records have been selected, you can select the action to perform on all these selected records.



- **Re-confirm selected records with current* Role/Sub-role:** This option is used to bulk re-confirm records, and simply marks the records as re-confirmed with the same role, which means they will not be automatically removed by the system, and that (e.g.) players can be selected in teams or umpires can be allocated to matches. Note – that any records selected that do not require re-confirmation will simply be ignored.
- **Change Sub-role of selected records to:** This removes the current* sub-role, and replaces with the selected sub role.
- Add role to selected records of [option]. This adds the selected Role/sub-role to the records, and leaves any existing roles intact. Note – this is the only option applicable when a selection of NO ROLES is made in Step 1.
- **Remove current* Role/sub-role from selected record**. This removes the current role.

The current Role/Sub-role in this instance is that selected initially in Step 1, and will be indicated at the top of the Person List.

Example : Club has 50 SENIOR players that require re-confirmation. 45 are to be re-confirmed, while 5 have left the club.

1. Click the **Display All** link for PLAYER/SENIOR in the Role Summary. The 50 records display in the Person List.
2. Choose **Select All** and click **Select** in the Bulk Select Records section. All 50 records are selected.
   Manually de-select the 5 records to remove from the Person List.

3. Choose the **Re-confirm selected Records** action.
4. Click **Commit Changes**. 45 records are re-confirmed, leave 5. A message displays 45 records reconfirmed as PLAYER/SENIOR . The Person List table now displays the 5 records still requiring reconfirmation.

Then,

1. Choose **Select All** , and click **Select** . All 5 records are selected.
2. Choose the **Remove role** action.
3. Click **Submit**. SENIOR sub-role is removed from the 5 records. A message displays PLAYER/SENIOR role removed from 5 records . No records now require re-confirmation for Sub-Role.

Roles that can be assigned to a Person and where these Person records will display in the system:

ROLE	Where visible
PLAYER	• Team selection page. • Player score cards. • Player transfer/clearance and mailing list. The record also stores special information applicable to this type, for example, availability and registration.
CONTACT	Mailing list
MATCH OFFICIAL	Match Official allocation pages (manual/automatic) and mailing list. The record also stores special information applicable to this type solely for instance accreditation & availability.
TEAM OFFICIAL	Team selection page, team nomination and mailing list.
OFFICE BEARER	Organisation's contact's details and mailing list.
SUBSCRIBER	
ADMINISTRATOR	
MEMBER	