In 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:

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

**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 New.

5. Complete the relevant details:

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

6. Click OK, then OK and Close.
To amend a role

1. Select the Roles Within Department line and click View/Edit.

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).

Useful Reports
To help track role holders don’t forget to check via:
PERDEP05_Employee Roles