



## Lighthouse Guide 6: Managing Roles

Roles contains a variety of useful information about volunteer and electoral roles that individuals hold, or have held in the party.

These are broken up across multiple sub-tabs to make things a bit more manageable.

Roles are generally only created for a single year, to indicate each individual volunteer term that someone has held - so if someone was elected as a Chair or Convenor for 3 years in a row, they would get 3 Chair roles, one for each term, rather than 1 3 year role.

Roles can also relate to things outside of your local party, like people who have qualified as party trainers and so they can also be a source of useful information about your members.

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### Permissions Required

	View	Edit	Create
View current member party roles	✓		
View past member party roles	✓		
Edit member party roles		✓	

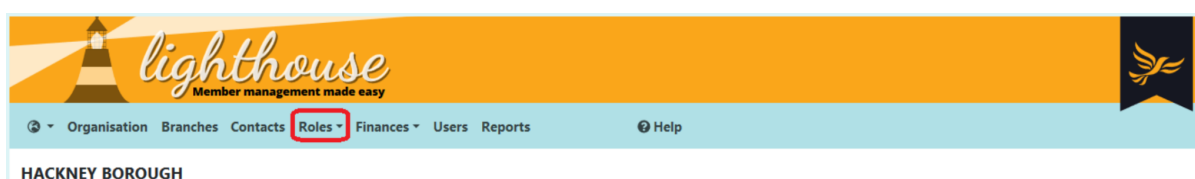
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Create member party roles			✓
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### How to view current and previous roles

#### Step 1

Whilst logged into Lighthouse. click on “Roles” in the blue menu bar at the top.



#### Step 2

A drop-down menu containing the Roles Sub-tabs will now appear. Each sub-tab contains a different set of data. A summary of the sub-tabs and what they contain can be found here:

Sub-tab	Roles contained within it
Campaigners	People with access to the Campaigners Google Drive or who have signed up to HQ update lists.
Electoral	Anyone who has been elected or is running for election in your area, as well as people who are acting as agents.
Federal Party	People holding roles managed or appointed by the Federal Party, like Designated Returning Officers and Returning Officers.
Local Party	Any Officers or Executive members in your organisation.
System Users	Anyone with access to party systems, like Lighthouse and Connect (please note, the

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	Connect list is updated manually)
<b>Other</b>	Any other roles that don't fit into the above categories.

### Step 3

You will be directed to the Roles page, where a list of people holding your specified type of role will be displayed in a list.

### Step 4 (optional)

A list of the current members holding the selected type of role will appear. In the example shown below, you can see a list of current officers in the Hackney local party.

To view previous years' officers, click on the button above the "Holder" column, which by default will be set to "Current".

The screenshot shows the Lighthouse software interface. At the top, there is a navigation bar with 'Organisation', 'Branches', 'Contacts', 'Roles', 'Finances', 'Users', 'Reports', and 'Help'. Below this, the breadcrumb path is 'HACKNEY BOROUGH > ROLES > OFFICERS'. There are buttons for '+ Add new', 'Download', and 'Filter', followed by a search bar and a dropdown menu set to 'Current'. The table below has columns: Reference, Position, Holder, Active, From, and Until. Two rows are visible:

Reference	Position	Holder	Active	From	Until
MPR00188162	Chair/Convenor	Officer name	✓	1 Jan 2020	31 Dec 2020
MPR00188159	Data Officer	Officer name	✓	1 Jan 2020	31 Dec 2020

### Step 5 (optional)

A drop-down list of previous years will appear. Click on the year you would like to view.

The screenshot shows the Lighthouse software interface with the 'Current' dropdown menu open. The dropdown list shows years from 2009 to 2020, with 2019 highlighted. The table below has columns: Reference, Position, Holder, Active, From, and Until. Seven rows are visible:

Reference	Position	Holder	Active	From	Until
MPR00188162	Chair/Convenor	2018	✓	1 Jan 2020	31 Dec 2020
MPR00188159	Data Officer	2017	✓	1 Jan 2020	31 Dec 2020
MPR00188161	Membership Development Officer	2016	✓	1 Jan 2020	31 Dec 2020
MPR00188165	Membership Secretary	2015	✓	1 Jan 2020	31 Dec 2020
MPR00188160	Secretary	2014	✓	1 Jan 2020	31 Dec 2020
MPR00188163	Treasurer	2013	✓	1 Jan 2020	31 Dec 2020

A list of member roles for your chosen year will appear.

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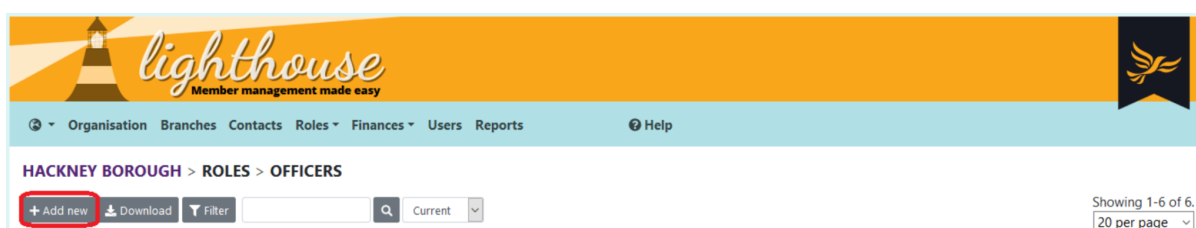
### How to create roles

#### Step 1

Following the steps in the last section, navigate to the right sub-tab for roles.

#### Step 2

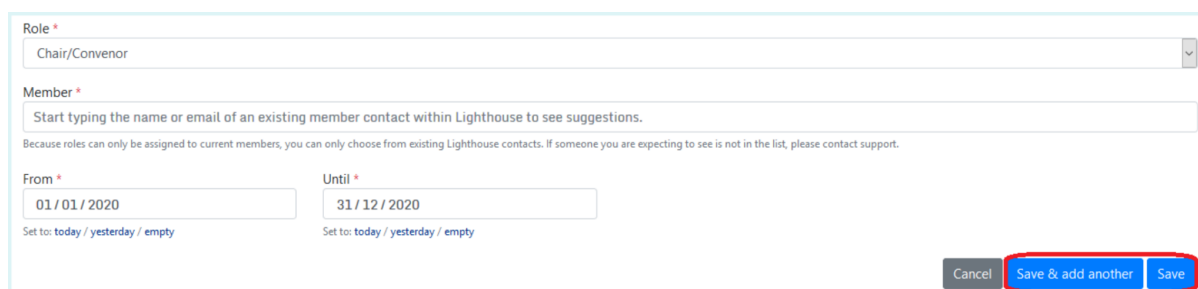
A list of the current members holding the selected type of role will appear. To create a new member role, click "Add new" above the list.



#### Step 3

You will be directed to the "New role" page. Click into the first drop-down menu to select the name of the role you are filling. Next, start typing the name of the new role-holder into the field next to "Contact". Lighthouse will show a list of your current contacts as you type - click on one of these to select them.

Finally, type in the dates of their term of office into the "From" and "Until" fields. Alternatively, mouse over the two fields and click on the single downward arrow which appears at the far right end of the box to select a date from the calendar.

The image shows a screenshot of the "New role" form in the Lighthouse application. The form has several fields: "Role" (a dropdown menu with "Chair/Convenor" selected), "Member" (a text input field with the placeholder text "Start typing the name or email of an existing member contact within Lighthouse to see suggestions."), "From" (a date input field with "01 / 01 / 2020" entered), and "Until" (a date input field with "31 / 12 / 2020" entered). Below the "From" and "Until" fields, there are links for "Set to: today / yesterday / empty". At the bottom right of the form, there are three buttons: "Cancel", "Save & add another", and "Save". The "Save & add another" and "Save" buttons are highlighted with red boxes.

When you are finished, click "Save". You will be directed back to the Roles page, where you can view your newly-added role. Alternatively, if you'd like to add another role, click "Save and add another".

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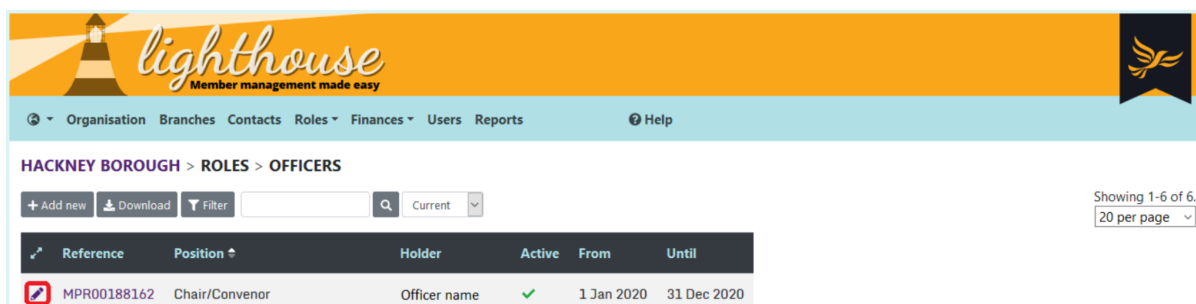
### How to edit roles

#### Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on “Roles” and follow the steps set out under How to view current member roles to choose the types of roles you would like to display.

#### Step 2

A list of the current members holding the selected type of role will appear. To edit an existing member role, click on the pencil icon next to the member’s name.

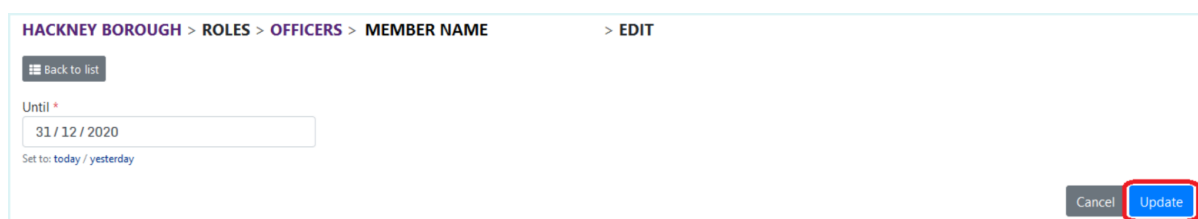


The screenshot shows the Lighthouse web interface. The header includes the Lighthouse logo and navigation menus for Organisation, Branches, Contacts, Roles, Finances, Users, Reports, and Help. The breadcrumb trail is HACKNEY BOROUGH > ROLES > OFFICERS. Below the breadcrumb, there are controls for adding new roles, downloading, filtering, and a search box. A table lists the current officers with columns for Reference, Position, Holder, Active, From, and Until. The first row shows reference MPR00188162, position Chair/Convenor, holder Officer name, active status, and dates from 1 Jan 2020 to 31 Dec 2020.

#### Step 3

You will be directed to the Edit page. Type in the new end date into the box on the left hand side of the screen, or alternatively click on the single downward facing icon at the far right end of the date field to select a new end date from the calendar.

When you are finished, click Update.



The screenshot shows the Edit Role page. The breadcrumb trail is HACKNEY BOROUGH > ROLES > OFFICERS > MEMBER NAME > EDIT. There is a 'Back to list' button. The 'Until' field is highlighted with a red box and contains the date 31 / 12 / 2020. Below the field, it says 'Set to: today / yesterday'. At the bottom right, there are 'Cancel' and 'Update' buttons, with the 'Update' button highlighted by a red box.

You will be returned to the Roles page, where you can view the edited role in the list.

### Electoral Roles

The one exception to the rules above are the “electoral” roles. These aren’t created in quite the same way as other roles.

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The process for this is outlined in more detail in [Guide 9](#), under “Add a Councillor”.

These roles also come with public contact details and biographical information which, when completed will display when people look up who their Councillors are on the party’s new website platform.

It’s therefore vitally important that you get your Councillors to complete these, so that people looking to find out who the Lib Dems are in their area can get in touch with them.

### Related guides and geek sheets

If you want to know more about Roles, you can find out more in these Guides & Geek Sheets:

- [Geek Sheet 7: Finding Candidates in Lighthouse](#)
- [Geek Sheet 11: Adding candidates & agents](#)
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