


## Adults Quick Guide

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### Assigning Work

All workflow steps have to be assigned to a worker, team inbox (virtual worker) or team as appropriate.

Work can be assigned from:

- The **Current work** folders of a worker, team inbox or the team (**Full** or **Narrow workview**)
- The **Allocations** and **Recently viewed** sections of an individual worker, when the **yellow folder** icon  is clicked to open the folder and display the workflow steps on that person's record (**Full** or **Narrow workview**)
- **Current work** on the **Person summary** screen of a person's record (**Closed** or **Narrow workview**)

Work can be assigned individually (one item at once), or work can be assigned in bulk (multiple items at once).

**Please note:** You cannot bulk assign work directly from a person's record or from the **Allocations** or **Recently viewed** sections. This can only be achieved from the **Current work** folders.

It is likely to be the role of the manager to assign work but depending on local/team arrangements, any worker with sufficient system permissions, will be able to assign work as required.

### Assigning Work Individually in Full or Narrow workview

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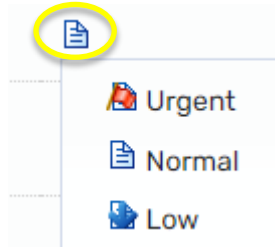
From within the **Current work** folders, **Allocations** or **Recently viewed** sections:

If assigning only one individual piece of work, you can use the **work** icon, next to the piece of work you wish to assign.

If required and you have sufficient system permissions to do so, prior to assigning the work you can also change the **Priority** of the work when in **Full workview**.

### To change the priority:

- Left click on the **Priority** icon - a mini menu will display



- Click on the relevant icon to select the new priority required

### To assign the work:

- Hover the cursor over the **work** icon next to the piece of work you wish to assign:



= **Incoming work** (not yet started)



= **Incomplete work** (started but not yet finished)



= **Future work** (has future scheduled start date)

**Please note:** The **work** icon changes to a **yellow cog** ⚙️ and displays a dialogue box describing what the workflow step is.

- Left click the **yellow cog** ⚙️ to see a list of actions you can take, which will vary according to your role and the type of work you are looking at
- Click **Update assignment**


An **Update assignment** window opens.

- To assign the work to a **member of your team / team inbox** select the worker / inbox from the 'Team worker' dropdown menu

**Please note:** Sub-team workers can also be included in the list by clicking the 'Show workers in sub-teams' checkbox. Where the workflow step is already assigned to a worker or team inbox their details will automatically display in the 'Team worker' dropdown menu but this can be updated as needed.

- To assign the work to a **worker not within your team**, use the 'Find' button next to the 'Pass to worker' field and perform a search for that worker
- To assign the work to a **different team**, use the 'Find' button next to the 'Pass to team' field and perform an organisation search

**Please note:** Only **Incoming** and **Future work** can be assigned to a team.

Where applicable, the '**Scheduled start date**' may default in as 'today' but this can be amended by using the **date picker** icon 

You can add an optional '**Note**' for the worker, team inbox or team receiving the assigned work. Adding a note is considered best practice in most scenarios.

- Click the **OK** button to assign the work

## Bulk Assigning Work in Full workview

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If assigning multiple pieces of work, you can use the **Bulk Assign** button on the **Current work** section.

**Please note:** The **Bulk Assign** button is only visible in **Full workview**.

- Click the **Bulk Assign** button

The **Bulk action** window will display

**Please note:** All the 'Current work' is listed in this window. You can filter the list using the 'Search' field or rearrange the order of the work by type, subject, title, priority or date by clicking on the relevant header option.

- To select **individual items** click the checkbox to their right
- To select **all items** click on the checkbox in the header

- To assign the work to a **member of your team / team inbox** select the worker / inbox from the 'Team worker' dropdown menu

**Please note:** Sub-team workers can also be included in the list by clicking the 'Show workers in sub-teams' checkbox.

- To assign the work to a **worker not within your team**, use the 'Find' button next to the 'Pass to worker' field and perform a search for that worker
- To assign the work to a **different team**, use the 'Find' button next to the 'Pass to team' field and perform an organisation search

**Please note:** Only Incoming and Future work can be assigned to a team.

Once you have selected the work you want to assign and who you want to assign it to the **Preview assign** button is enabled.

- Click the **Preview assign** button

You can add an optional 'Note' for the worker, team inbox or team receiving the assigned work.

Adding a note is considered best practice in most scenarios, but the same note will appear against all items of work if you are assigning multiple items.

- Click the **Assign** button to assign the work

## Assigning Work from within a Person's Record

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From **Current work** on the **Person summary** screen:

- Click the **work** icon next to the piece of work you wish to assign:



= **Incoming work** (not yet started)



= **Incomplete work** (started but not yet finished)



= **Future work** (has future scheduled start date)

You will see a list of actions you can take (which will vary according to your role, system permissions and the type of work you are looking at).

- Click **Update assignment**

**Please note:** You will usually only see the option to '**Update assignment**' if the workflow step is currently assigned to you, a member of your team or your team (the 'Update assignment' option is visible based on system permissions).


An **Update assignment** window opens.

- To assign the work to a **member of your team / team inbox** select the worker / inbox from the 'Team worker' dropdown menu

**Please note:** Sub-team workers can also be included in the list by clicking the 'Show workers in sub-teams' checkbox. Where the workflow step is already assigned to a worker or team inbox their details will automatically display in the 'Team worker' dropdown menu but this can be updated as needed.

- To assign the work to a **worker not within your team**, use the 'Find' button next to the 'Pass to worker' field and perform a search for that worker.
- To assign the work to a **different team**, use the 'Find' button next to the 'Pass to team' field and perform an organisation search.

**Please note:** Only **Incoming** and **Future work** can be assigned to a team.


Where applicable, the '**Scheduled start date**' may default in as 'today' but this can be amended by using the **date picker** icon 



You can add an optional '**Note**' for the worker, team inbox or team receiving the assigned work. Adding a note is considered best practice in most scenarios.


- Click the **OK** button to assign the work

## Accessing the Team Workview

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The **Team workview** is accessed by clicking the **Show team workview** icon  available in **Full** or **Narrow workview**.

**Please note:** The **Show team workview** icon  changes into the **Show individual workview** icon  and can be used to return to your individual workview.

The **Current work** section is found underneath the **Team summary**. If needed, click on the **Current work** section to open it and click on the **yellow folder** icon  to open each folder within the section to display the work assigned to the team.


As previously described work can be assigned [individually](#) or in [bulk](#) from the team's **Current work** folders.

## Checking Assignment History (Details)

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**Assignment details** on the **Workflow Step Summary** screen for any workflow steps shows the last person the workflow step was/is currently assigned to.

Clicking the **History** hyperlink allows you to view a list of all assignment details if the work has been reassigned at all. This shows you who assigned the work along with the date and time they did it. See the **Workflow Step Summary** user guide for further details.

This information can also be accessed by left clicking the **work** icon (which changes to a **yellow cog**  when you hover over it) within your/the team's **Current work**, **Allocations** or **Recently viewed** sections in **Full workview** and selecting **Assignment history** from the mini menu.