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| Managing User Assignment Templates | | | |
| **NBIS Release Version:** 4.0 | **Updated Date:** 05/23/2022 | | **File ID:** JA-028 |
| **Application Section:** Organization Management | | **User Roles:** User Manager | |
| **Applies to Organizations:** Adjudication, Appeals, Continuous Vetting, Component Adjudication, Interim, Screening, SSC, FSO, Review, Authorize | | | |
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| Related Documents:  Managing Users and Personas (JA-042)  Managing User Levels (JA-027) | | | |

**Purpose**: User Assignment Templates can be used to apply assignment attributes to multiple personas. User Assignments determine a user’s capabilities and are managed by the **User Manager** role. Multiple assignments for the same phase can be configured within a template.

**Definition**: User Assignments are the user persona’s skillset. What they are configured for in this (Persona) tab indicates what, if anything a user can work on for cases.

# Create a User Assignment Template

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **User Assignment Templates**.
4. To create a new template, select **Add Template.**

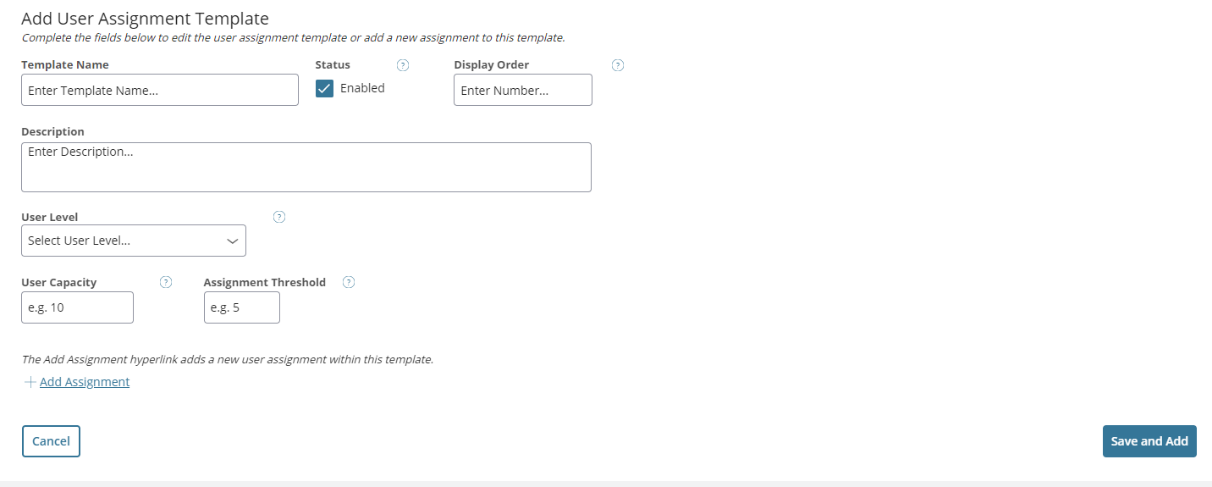


Figure 1: Add User Assignment Template

1. Provide the Template information.
2. To allow work to be automatically assigned, configure the **User Capacity** and **Threshold Values**.

Notes:

* **User Capacity** sets the maximum number of cases a persona may be automatically assigned.
* **Threshold** sets the minimum number of cases a persona can have in their worklist until the system queries for cases that match the persona’s capabilities and adds cases to the user’s worklist up to the capacity.
* **Capacity** and **Threshold** are required if the **Automatic and/or Manual Assignment** method is selected for an assignment.
* A user can be manually assigned cases that may exceed their User Capacity if the **Manually Assign to a Capable User** button is selected.
* Automatic Assignment Occurs when the User Logs into NBIS if they are below Capacity, or when the Assigned cases reached the Threshold Value.

1. Select **Add Assignment** to add an assignment to the persona. Multiple assignments can be added per organization.

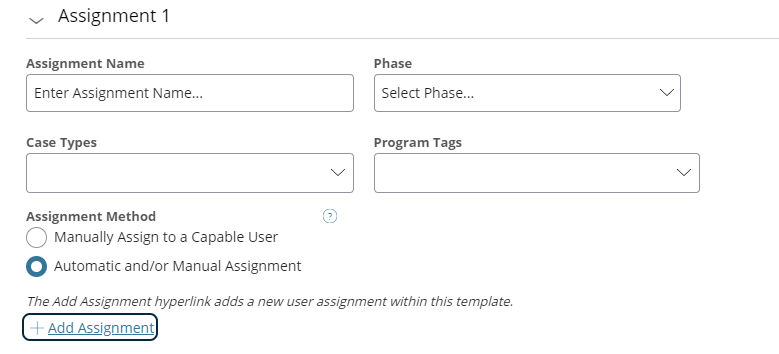


Figure 2: Add Assignment Section of Add Assignment Template

* 1. Select the **Phase** for the assignment. The phase determines what phase of the case the user can work on.

Note: Additional fields will populate depending on the phase selected.

* 1. Select the **Assignment Method** for the user assignment.

1. “Manually Assign to a Capable User" means that the persona can access and work on a case with certain attributes, but only if they are manually assigned the case, not through automatic assignment.
2. “Automatic and/or Manual Assignment” means that the persona can work on and will be automatically assigned the case or task; selecting this option will still allow for manual assignment.
   1. “Select the appropriate **Case Type** and **Workflow Status** options for the persona.These sections indicate the types of cases or tasks you want the user to be capable of working on.
   2. Select any applicable **Program Tags** needed for this assignment configuration.
3. Select **Save and Add** to create the template.

# View, Edit, and Delete a User Assignment Template

1. From the left navigation menu, select **Org Management**.
2. Select the **Configuration** tab.
3. From the Configuration Menu drop-down, select **User Assignment Templates**.
4. Select the **User Level Name** to view its details.
5. From the **Actions** drop-down, select **Edit Template** or **Delete Template.**

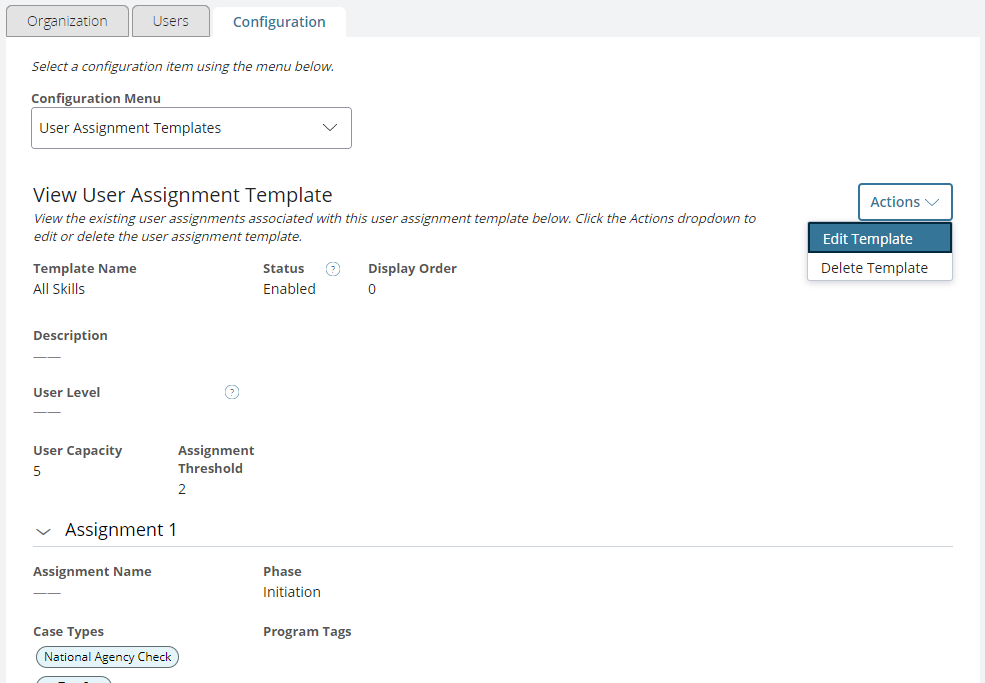


Figure 3: View User Assignment Template