



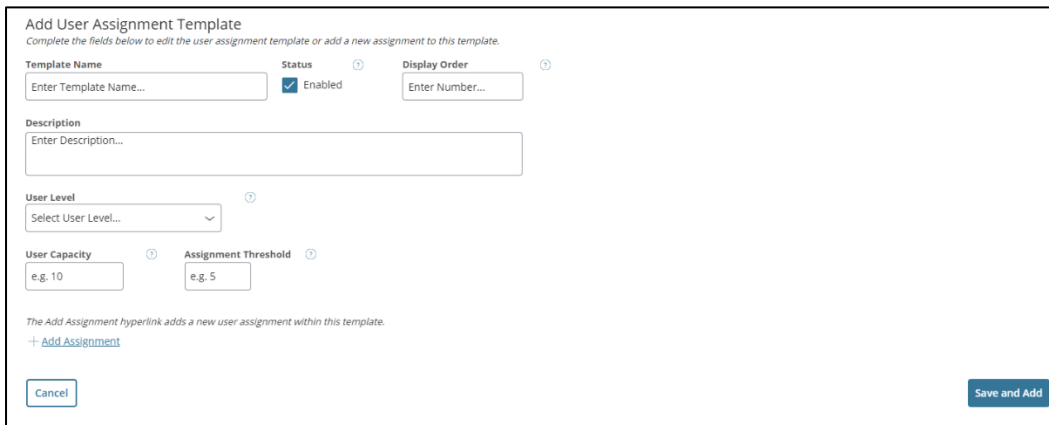
<h2>Managing User Assignment Templates</h2>	
<b>NBIS Release Version:</b> 4.0	<b>Updated Date:</b> 05/23/2022
<b>File ID:</b> JA-028	
<b>Application Section:</b> Organization Management	<b>User Roles:</b> User Manager
<b>Applies to Organizations:</b> Adjudication, Appeals, Continuous Vetting, Component Adjudication, Interim, Screening, SSC, FSO, Review, Authorize	
<b>Table of Contents:</b> Create a User Level ..... 1 View, Edit, and Delete a User Assignment Template..... 3	
<b>Related Documents:</b> 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**.



**Add User Assignment Template**  
 Complete the fields below to edit the user assignment template or add a new assignment to this template.

Template Name:  Status: ☒ Enabled  Display Order:

Description:

User Level:

User Capacity:  Assignment Threshold:

The Add Assignment hyperlink adds a new user assignment within this template.  
[+ Add Assignment](#)

Figure 1: Add User Assignment Template

5. Provide the Template information.





6. 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.
7. Select **Add Assignment** to add an assignment to the persona. Multiple assignments can be added per organization.

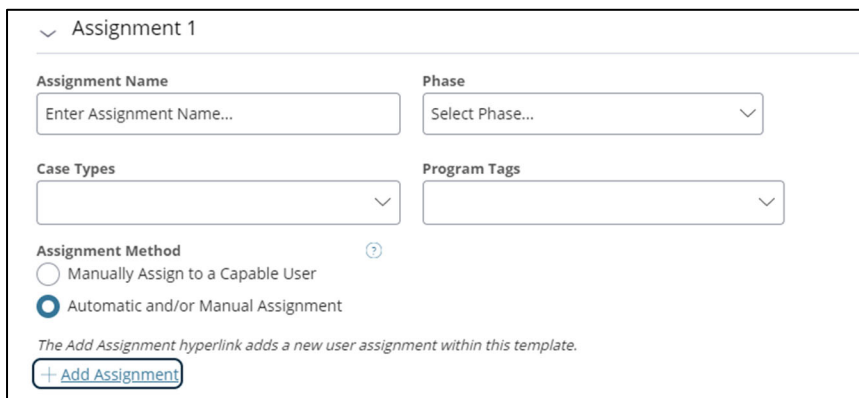


Figure 2: Add Assignment Section of Add Assignment Template

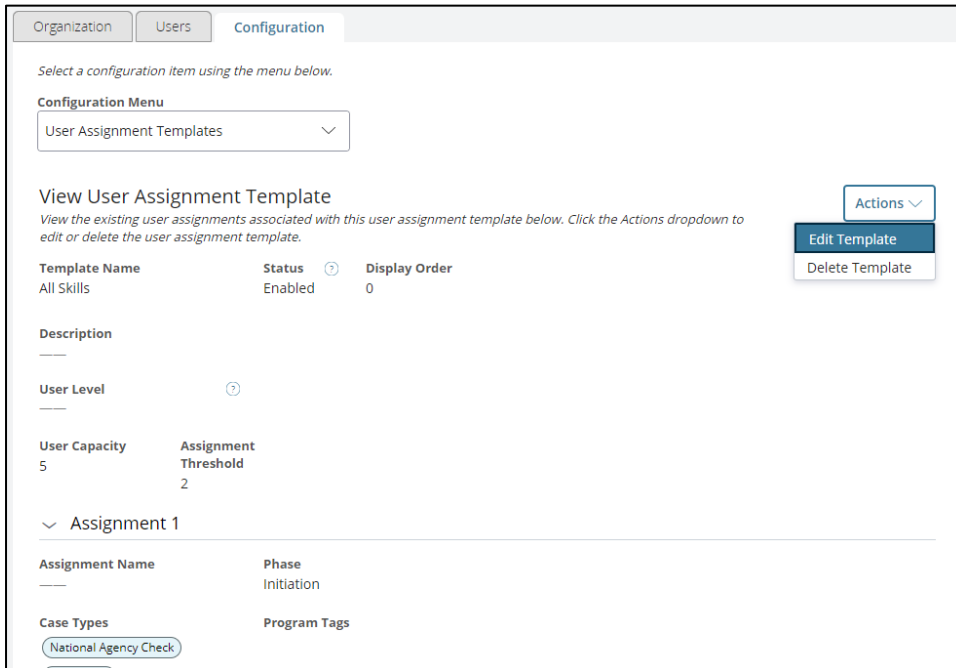
- a. Select the **Phase** for the assignment. The phase determines what phase of the case the user can work on.  
Note: Additional fields will populate depending on the phase selected.
  - b. Select the **Assignment Method** for the user assignment.
    - i. "Manually Assign to a Capable User" means 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.
    - ii. "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.
  - c. "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.
  - d. Select any applicable **Program Tags** needed for this assignment configuration.
8. 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**.



The screenshot shows the 'Configuration' tab selected in the top navigation bar. Below it, the 'Configuration Menu' dropdown is set to 'User Assignment Templates'. The main content area is titled 'View User Assignment Template' and includes a descriptive paragraph. The template details are as follows:

Template Name	Status	Display Order
All Skills	Enabled	0

Below the table, there are fields for 'Description', 'User Level', 'User Capacity' (5), and 'Assignment Threshold' (2). A section titled 'Assignment 1' is expanded, showing 'Assignment Name' and 'Phase' (Initiation). At the bottom, there are 'Case Types' (National Agency Check) and 'Program Tags'.

On the right side of the interface, there is an 'Actions' dropdown menu with two visible options: 'Edit Template' and 'Delete Template'.

Figure 3: View User Assignment Template

