

5.3.6.1 Automatic Assignment Work to Users

Auto-Assign Work is the process by which the items are *equally* distributed between the users.

Auto-Assign work to users

1. Click **Auto-Assign Work** from the **Assign Work to Users** page.

The screenshot shows the 'Auto-Assign Work' page for 'Project: Vikys Project'. The page includes a sidebar with navigation options: Manage Users, Contact Users, Committees, Create Roles, Assign Roles, Assign Questions, and Item Check-out. The main content area has a title 'Auto-Assign Work' and a 'Project: Vikys Project' header. Below the header is a text box explaining the process: 'Enter the number of questions for each tally-level node you would like to distribute amongst the writers. The numbers entered below will be roughly equally divided amongst all writers. Required number of reviewers and validators will also be assigned to each blueprint node. Note: This will create new assignments. In case of Writing assignments, the numbers entered will be distributed across all eligible users. Metadata criteria will only be available for Write assignments. It disappears when you select Validate or Review type of assignments. Existing assignments will remain.'

Assignment options include: Assign: Writers Validators; Review States: Review: Review One Review: Review Two Review: Review Three; Due Date: [text box]; Select Blueprint Level: Task; Select Metadata and Content: Anchor <Select One>; Remove all Metadata Criteria; Add Metadata.

Criteria	Details		Write Goal
Blueprint	I.A Algebra	<input type="checkbox"/>	[text box]
Blueprint	I.B Trigonometry	<input type="checkbox"/>	[text box]
Blueprint	I.C Calculus	<input type="checkbox"/>	[text box]
Blueprint	II.A Astronomy	<input type="checkbox"/>	[text box]
Blueprint	II.B Geology	<input type="checkbox"/>	[text box]
Blueprint	III.A Grammar	<input type="checkbox"/>	[text box]
Blueprint	III.B Vocabulary	<input type="checkbox"/>	[text box]

Buttons at the bottom: Delete ALL Assignments, Distribute Assignments.

2. From the **Auto-Assign Work** page, select check boxes for the type of work to be assigned to the users. This includes Writers, Validators, and Reviewers for the various Review States of the project. Also specify the assignment deadline in the **Due Date** text box either manually or using the calendar button. In this way, distribution of assignments can be restricted only for Writers, Reviewers (Number of review states available i.e., Review: State one, Review: State two, etc.), and Validators.
3. Select the users in the **Users** list box to whom the work is to be assigned.
4. Next, select the level of the blueprint required in the **Select Blueprint Level** drop-down field.
5. Select a metadata category from under the **Select Metadata and Content** section and select a metadata name from the next drop-down. This depends on the metadata category selected in the first drop-down. Select the metadata content in the next drop-down that appears after you select the second drop-down option. Click **Add Metadata**. The selected metadata also appears under the Criteria listed at the bottom of the page. If you want to remove all the added metadata criteria, click **Remove all Metadata Criteria**. If it is not necessary to specify any metadata criteria, this step can be skipped.



Only **Drop-down** and **Multi-select List** types metadata can be specified for a Write assignment.



The Select Metadata and Content section disappears if you choose a Validators or Review States check box. It is only applicable for Write assignments.

6. In the **Write Goal** column, enter the number of items to be distributed against each blueprint / metadata criteria.
7. Check boxes next to each of the blueprint / metadata criteria can be selected as necessary to determine which of them are to be selected for the assigned work.

8. Click **Distribute Assignments**. (If you want to start all over again, you can click **Delete ALL Assignments**).
9. The assignments are distributed according to the choice made by the Project Manager.
10. To view the assignments distributed, see the **Assign Questions** page.



How do I delete all the assignments?

If you click the **Delete ALL Assignments** button from the **Auto-Assign Work** page, all of the current assignments for all the users are deleted including assignments distributed by the manual distribution mode.



Ensure the user has been given the appropriate Permissions to complete the work assignments.

Distribution of assignments depends upon the number of Writers, Reviewers, and Validators assigned to the project.

The user can get the same blueprint for Review and Validate assignments *only once*.

The user can get the same blueprint for Write assignments *more than once*.

Remember that items can only be viewed by SMEs when they are in the Review state.

The Project Manager can go to the **Assign Questions** tab and adjust any user's assignments manually at any time.