

## Admin05 – Assignments (Main Page)

Summary.....	1
Purpose.....	1
Screen Group.....	2
Screen View.....	2
Assignment Structure Filter.....	3
Current Assignments Grid.....	3
Report Generation.....	4
Page Access.....	5

### Summary

Below are some of the main elements of the Assignments page:



**Assignments |**

**Assignment Structure**

Dept Code:  PI:

Search

Restructure Assignments

Download my Dept Codes

**Current Assignments**

Update Assignments

	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*

Callouts:

- Click search to update grid
- Enter fields to search/update grid
- Click to open Restructure Assignments Popup
- Click to download to Excel
- Click to open Update Assignment popup
- Select checkmarks to update selected assignment
- Select Highlighter pen to highlight single row

### Purpose

The purpose of the Assignments page is to allow Department Administrators and certain EFM users to assign specific personnel to provisions and COPs. The Assignments Main Page consists of an Assignments Filter and a Results Grid that enables the user to search for and view a list of current assignments. Assignments in the list can then be selected and edited by the user. Below is a sample view of the Assignments main page:

## Assignments

### Assignment Structure

Dept Code

PI

Search

Restructure Assignments

Download my Dept Codes 

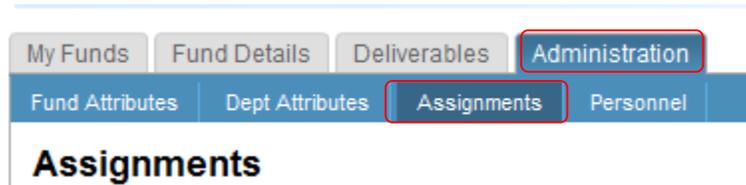
### Current Assignments

Update Assignments

<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL				
<input type="checkbox"/>		ALL	*	*	*	*
<input type="checkbox"/>		ALL	*	*	*	*

## Screen Group

The Assignments Main Page is located in the Administration Tab, which can be accessed using the top menu in PAMS:



## Screen View

The Assignments Main Page is visible to all users, but can only be edited by the EFM Director/AD, EFM Supervisor, and Department Administrator. The screen consists of the Assignment Structure filter (green box) and the Current Assignments results grid (red box):

## Assignments |

**Assignment Structure**

Dept Code

PI

Search

Restructure Assignments

Download my Dept Codes

**Current Assignments**

Update Assignments

	<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
	<input type="checkbox"/>		ALL	*	*	*	*
	<input type="checkbox"/>		ALL	*	*	*	*
	<input type="checkbox"/>		ALL	*	*	*	*
	<input type="checkbox"/>		ALL	*	*	*	*
	<input type="checkbox"/>		ALL	*	*	*	*

### Assignment Structure Filter

The Assignment Structure filter will mirror the Assignment Structure set in the Restructure Assignments pop-up (see Assignments Pop-up quick guide). Using the filter, the user can enter or select values in the filter fields (example: Dept Code, Award Type) and then click the search button to display the current assignments that fall under the filter values that have been entered. If the user leaves the filters blank and then clicks search, all of the current assignments will be returned in the grid below.

The Assignment Structure Filter can contain any combination of the following fields:

- PI
- Dept Code

The user can assign preparers and reviewers to provisions and COPs based on the combination of the fields selected for the Assignment Structure. For example, if the administrator assigns COPs based on Dept Code and PI, they would set these three fields as their assignment structure. These two fields would then be displayed in the filter.

The filter fields are hierarchical, meaning that when a user enters a value in first (top) filter field, that value will limit the second filter field to the resulting subset of values available.

### Current Assignments Grid

Clicking the Search Button will display the Current Assignments Grid. The lines displayed in the grid will be limited by the selection made in the Assignments Filter (i.e. if Dept Code 1553 is entered in the filter, the results grid will display just those assignments for dept code 1553).

The First 1-3 Columns of the Assignments Grid will mirror the Assignment Structure; so if the Assignment Structure is set to 1. Dept Code > 2. PI, the first two grid columns will display as shown below:

### Current Assignments

Update Assignments

	<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
	<input type="checkbox"/>			*	*	*	*

To the right of the Assignment Structure columns, the grid displays the Preparer, and up to three Reviewers currently assigned to that structure, all which are sortable columns. Only the Preparer field is required. If the user would like to change the current assignments displayed in the grid results, they can click the checkbox to the left of the assignment line, then click the Update Assignments Button to be taken to the Update Assignments Pop-up (see Update Assignments Pop-up quick guide):

### Current Assignments

Update Assignments

	<input type="checkbox"/>	Dept Code	PI
	<input checked="" type="checkbox"/>		ALL
	<input type="checkbox"/>		ALL
	<input type="checkbox"/>		ALL
	<input type="checkbox"/>		ALL

Additionally user can use the highlighter tool by selecting the yellow pen to highlight a single line at a time to assist in selection accuracy.

### Current Assignments

Update Assignments

	<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
	<input checked="" type="checkbox"/>			*	*	*	*
	<input type="checkbox"/>			*	*	*	*
	<input type="checkbox"/>			*	*	*	*

## Report Generation

There are two reports that can be generated from the Assignments Main Page.

The first is an Excel list of the Dept Codes available to the current user. This Excel list is generated by clicking the Download my Dept Codes icon:

## Assignments

### Assignment Structure

Dept Code

PI

Search

### Current Assignments

	<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				



The second report that can be generated is an Excel version of the Assignments Grid results. This report can be generated by clicking the Excel icon located on the top right of the results grid:

## Assignments

### Assignment Structure

Dept Code

PI

Search

### Current Assignments

	<input type="checkbox"/>	Dept Code	PI	Preparer	Reviewer	Reviewer	Reviewer
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				
	<input type="checkbox"/>		ALL				



## Page Access

The Assignments Main Page is visible to all, but only editable by those users allowed to modify assignment personnel. These users are the EFM Director/AD, EFM Supervisor, and Department Administrator.