How to Configure and Use Tracking Item Assignments
Version 1.0

Purpose

This document provides guidance for tenant admins on how to configure tracking item assignment, and instructions for staff on how to use the feature. This document is intended for tenant admin users and members of the implementation team.

Related Resources

Tracking Item Configuration Guide
How to Configure Email Message Templates

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About Tracking Item Assignment

It is not uncommon for some staff roles to have relationships to all students, resulting in high volumes of tracking items and related notifications for those staff. Tracking item assignment allows users to better manage their caseloads of flags, referrals, and to-dos, helping to insure that no student is overlooked.

This feature allows designated staff roles the ability to assign tracking items to themselves, others, or to put items back into the unassigned queue. This gives team members a clearer understanding of what tracking items belong to them, thus narrowing their focus to items that specifically need their attention.

This feature introduces a new "**Assign**" privilege within the tracking item configuration process. The **Assign** permission controls which roles can assign items to themselves or other staff members.

📌 Note: Only those with the **Manage** privilege for a specific tracking item can be assigned that item. For more information about configuring tracking items, refer to the [Tracking Item Configuration Guide](#).
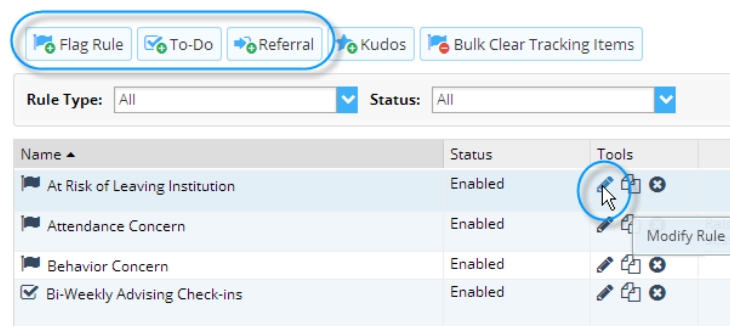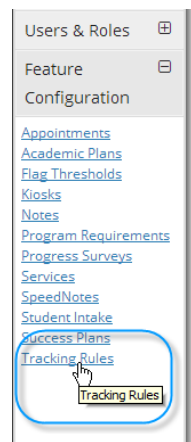
Configure Tracking Item Assignment

Flags, to-dos, and referrals can be configured to include the **Assign** privilege and to include email notifications to the person who receives an assignment. The process for configuring assignment privileges is similar for each of these tracking item types.

📌 Note: Kudos **cannot** be given assign privileges.

The Assign privilege and related email notification settings are found on the **Privileges** page of the tracking item configuration wizard.

Navigate to the Privileges page

1. Select **Tracking Rules** from the **Feature Configuration** section of the **Admin** menu to open the **Tracking Rules** page.

2. Click the button associated with the desired tracking item type to create a new item (**Flag Rule**, **To-Do** or **Referral**, or choose an existing tracking item from the list and click the **edit** icon (✏) to load the tracking rule wizard. Here we will look specifically at editing an existing **Flag Rule.**

3. Step through the wizard by clicking the **Next** button until you reach the **Privileges** page.

The **Privileges** page displays a summary of roles, privileges, and email templates associated with this tracking item. There are two columns related to tracking item assignment.

- **Assign**: A check mark in the **Assign** column indicates a role that has permission to assign this type of item to other staff members who have the manage permission on this item

- **Assign Email**: A template name in the **Assign Email** column indicates that individuals in this role will receive an email whenever an item is assigned to them.

Add/Edit the Assign permission

4. Click on the **edit** icon (🖉) associated with a role to modify the privileges and email notification settings for that role. To add a new role with associated permissions and notification settings, click the **Add Role** button above the summary table.

5. The **Add/Edit Role** privileges page is displayed.
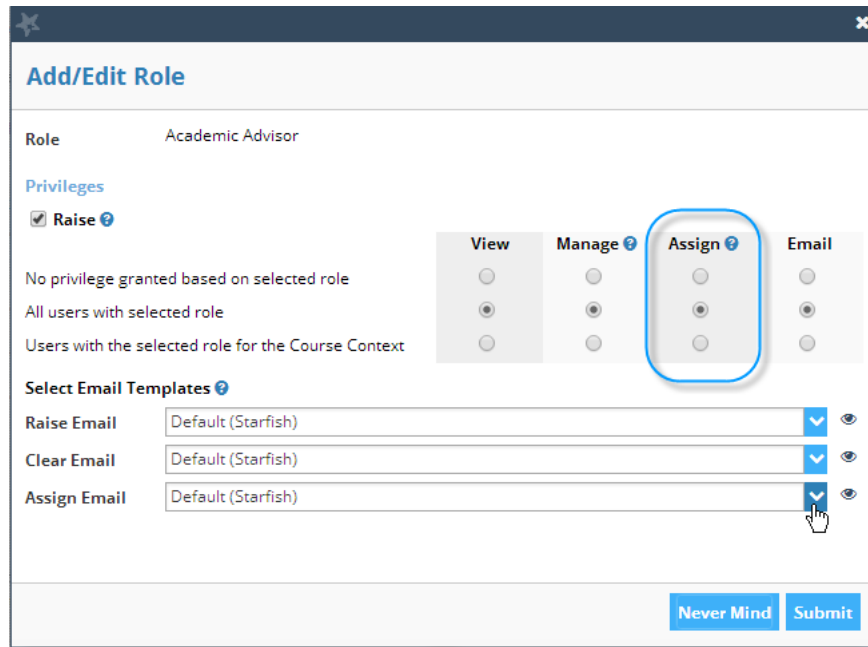
6. Select the desired **Assign** privilege for this role. The options for allowing a role to assign the tracking item include:

- **All users with selected role**: Give the role permission to assign this tracking item

- **Users with the selected role for the Course Context**: Give a course-based role (e.g. instructor) permission to assign the item only if related to a student in one of their courses.

  If the role should not have permission to assign this tracking item, select **No privilege granted based on selected role**.

📌Note: It is important to distinguish the *ability to assign* an item from the *ability to receive an assignment*

- A role that is going to *assign the tracking item to others* must have **Assign** and **View** permission. If you can't view a tracking item, you can't assign it. The system will automatically grant the **View** permission when you select **Assign** for a role.

- A role that is intended to be *the recipient of an assignment* must have **Manage** permission. If you can't manage an item, you cannot be assigned that item.
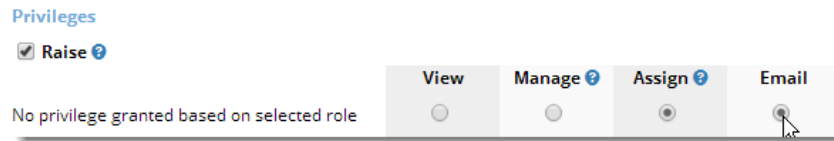
Add/Edit Assignment notification setting

Email privileges work in conjunction with email template selections to determine what email is sent for any combination of role and tracking item.
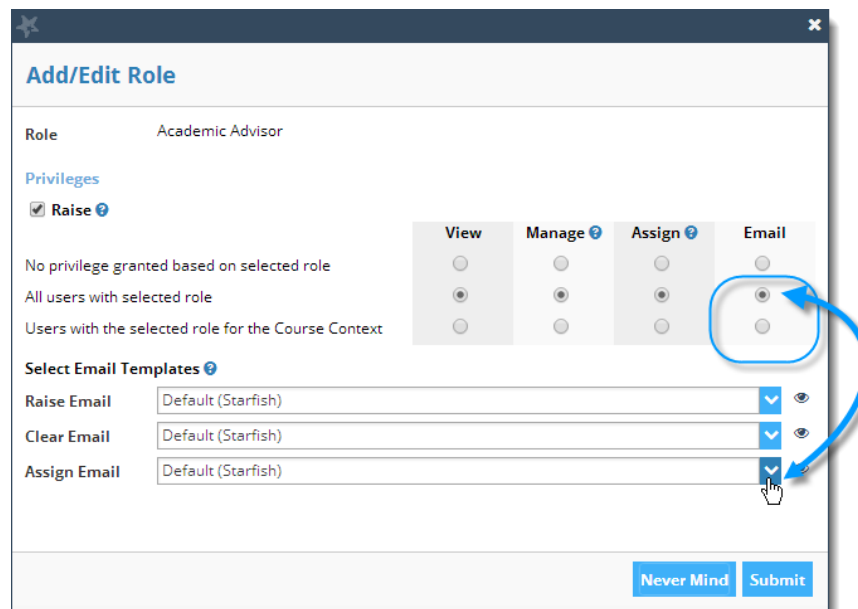
7. Specify the **Email** privilege for the role

- If this role should not get *any* emails for this tracking item, select **No privilege granted based on selected role** as the **Email** privilege.
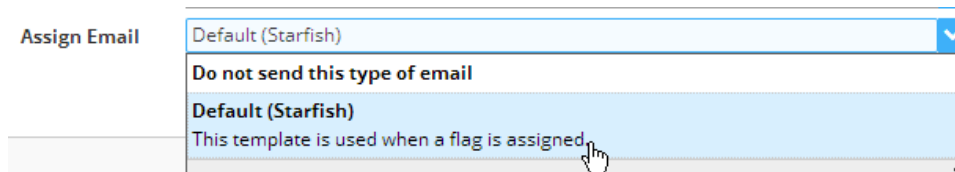
- If this role should get email for *at least one* event related to this tracking item (e.g. raise, clear, assign) elect either **All users with selected role** or **Users with the selected role for the Course Context** as the **Email** privilege.

8. Specify the template to use for the **Assign Email**.

- If an email should be sent to the assigned individual when this item is assigned, select the **Default (Starfish)** template associated with the **Assign Email** in the **Select Email Templates** section of the **Add/Edit Role** page.

📌 Note: you may also use a customized assignment template created with the message template editor. But you must select a template for **Assign Email** in order to send a notification. See How to Configure Email Message Templates for more information on this topic.

- If an email should **NOT** be sent to the assigned individual when the item is assigned, select **Do not send this type of email** as the **Assign Email** option under **Select Email Templates**

9. Click the **Submit** button on the **Add/Edit Role** page to save your updates to privileges and email notifications.

Repeat steps 4 - 9 to modify additional roles. Click the **Finish** button to save your updates.

About Assigning Tracking Items

Tracking item assignments allow staff to assign tracking items to themselves or others based on privileges associated with their role and the tracking item.

You can access tracking item assignments from the Home page, the My Students tab, the student Tracking tab, and from within the Student Folder.

You may interact with Assignments as either an assignee or an assigner.

As an Assigner: If you have the assign permission on a flag, to-do or referral, you can assign the item to any user (yourself or another provider) that has **Manage** permission on that item. You can also re-assign the item to someone else, or remove the assignment altogether to make the item unassigned.

As an Assignee: If you have manage permission on a flag, to-do, or referral, a user with the assign permission for that item can assign it to you. You can filter your lists based on items assigned to you, and also see where other users have been assigned to an item. You may also receive an email when items are assigned to you depending on the specific configuration your administrator set for each item.
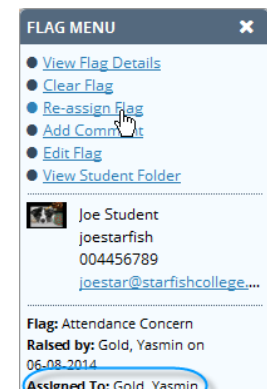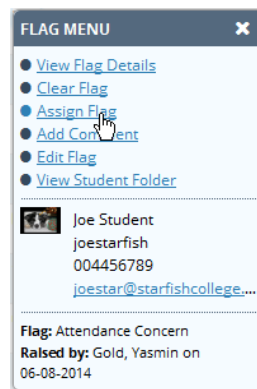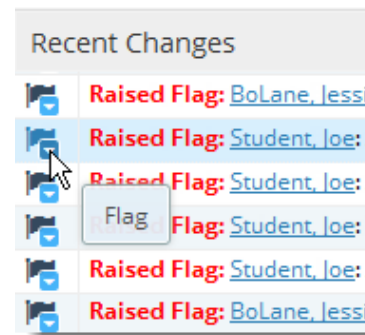
How to assign a tracking item

Assign or re-assign an existing item

A user with the assign permission for an item will find the **Assign** option on the mini-menu associated with the tracking item wherever it appears.

For example, in the recent changes channel on the **Home** page, or with an item on the **Tracking** tab.

Click the tracking item's icon (e.g.) to bring up the tracking item's menu. If the item is not assigned and you have permission to assign it, the **Assign** option will be listed.

If the item is currently assigned, the assignee is listed at the bottom of the menu, and the option to **Re-assign** is displayed in the menu to those with the permission to assign the item.

You can also use the **Assign** button located on the **Tracking** tab. Select the student(s) and item(s) to be assigned then click the **Assign** button.
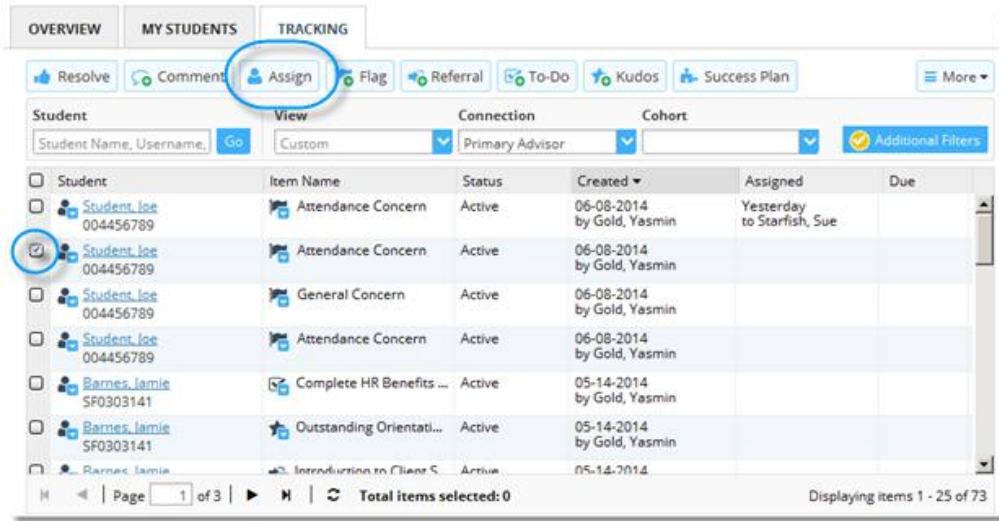

When you click the **Assign** or **Re-assign** option, you are presented with the **Assign Item** window.

If the item is currently assigned, the label **Current Assignee** and the name of the person to whom the item is assigned will be displayed at the top of the window

Select an option for **Assignee** from among these three options:

1. **Unassigned**: Remove an existing assignment.

2. **Me**: Assign to self. (Only an option if the user has both **Manage** and **Assign** privilege for this tracking item).

3. **Provide**r: Assign to someone else that has the **Manage** privilege. Start typing a name to filter the list further. Only people who have a relevant relationship to the student are listed.
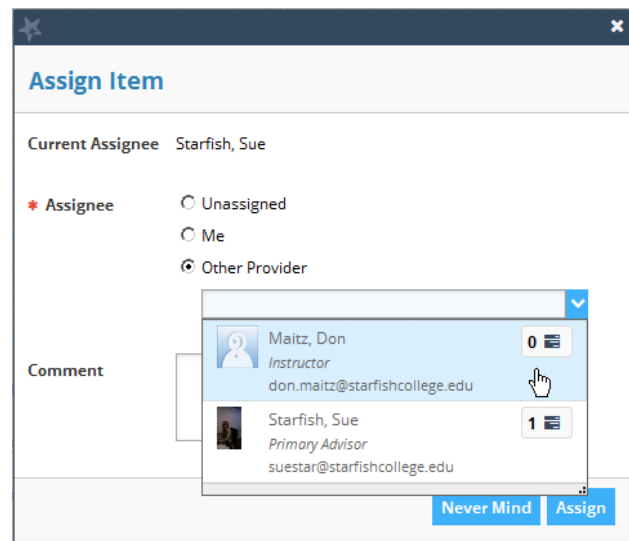
📌 **Note:** The number of items currently assigned to each provider will be displayed to the right of each name in the dropdown list to assist you in balancing case loads.
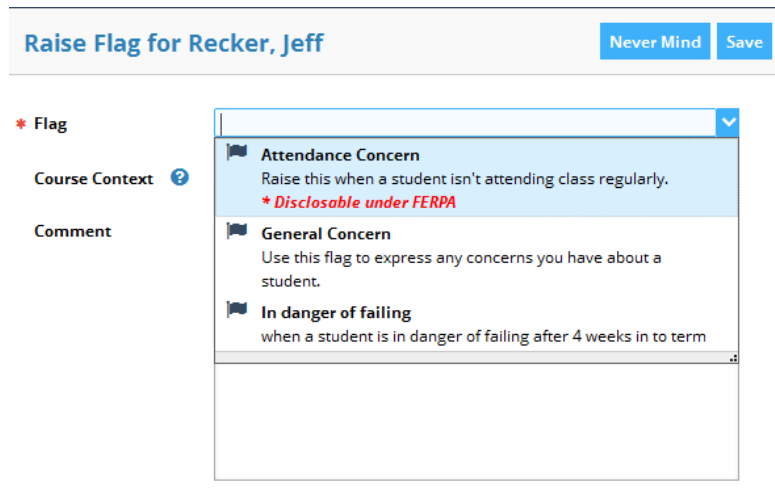
Enter a **Comment** that will be included in the tracking item **Notes** and included in the **Assign Email** if configured to be sent to the assignee.

Click the **Assign** button to complete the assignment.
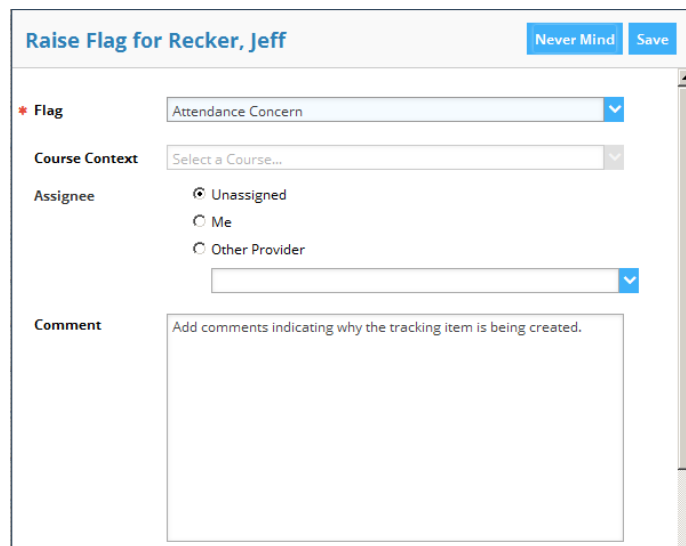
Assign an item as part of creating it

Users with the **Assign** privilege to a tracking item can assign an item while creating it.

You must first select the item to be raised/created on the **Raise Flag** window (or **Create To-Do**, **Create Referral** window).

If the item you select is one on which you have the **Assign** privilege, the **Assignee** options will be added to the window. The assignment options are the same as when you assign an existing item.


📌 **Note:** The **Comment** entered in this case is *both* the "raise" comment and the assignment comment. This means that it will be seen by those with **View** permission on the item. This *includes the student* if the student has **View** permission on the item.

Bulk assign tracking items

Navigate to the **Tracking** tab within the **Students** area and select the group of items to be assigned by clicking the checkbox to the left of each row you want to include.

Click the **Assign** button from the action bar above the student list.
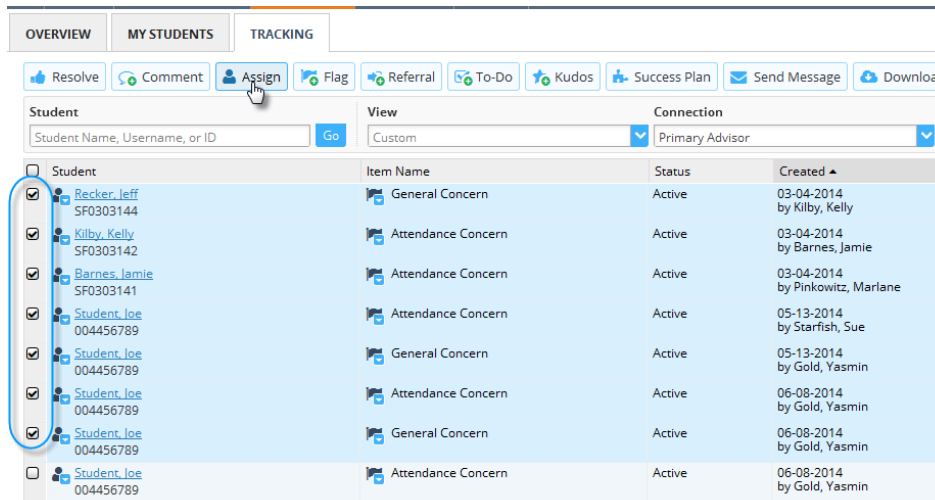
A warning message may display noting any items that are not actionable (those you don't have permission to assign). Click the **OK** button to assign the other items in your selection.
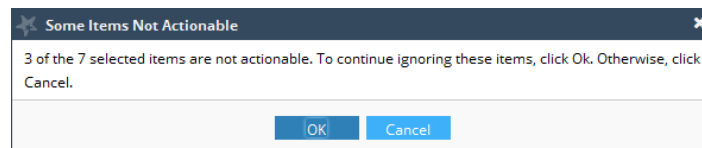

The **Assign Item** window is displayed with the number of items being assigned in the title.

Select the desired **Assignee** option, and click the **Assign** button to assign the items.

📌 Note: The list of providers will be limited to those that have the **Manage** privilege and a relevant student relationship for *all* of the items being assigned. If there are no providers with permissions to all items (including yourself) you will not be able to select an assignee.

The only option may be "Unassigned".
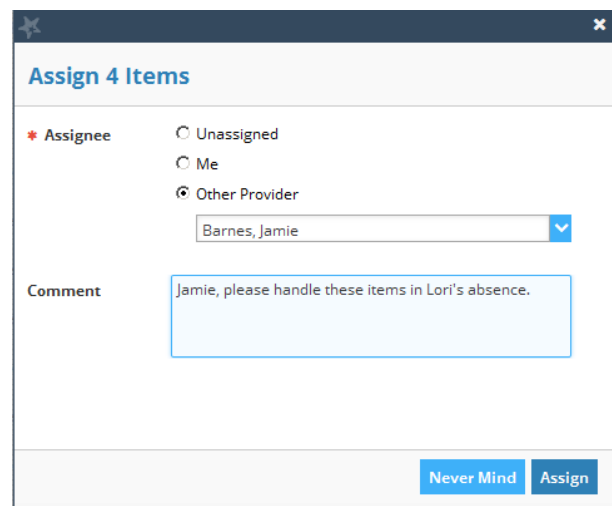
Working with assigned items

Filter by assignment

There are two options for filtering based on **Assigned To** values. You can use either a predefined **View**, or the **Additional Filters** option. Each is described in more detail below.

Use a predefined View

Select the drop down arrow (🔽) associated with the **View** filter on the **Tracking** tab within the **Students** area. This option is also available within an individual **Student Folder** on its **Tracking** tab

- Select the "**Assigned to Me**" view, to filter the list to all items assigned to you (active or resolved).
- Select the "**Unassigned**" view to filter the list to all items (active or resolved) that have no assignee.
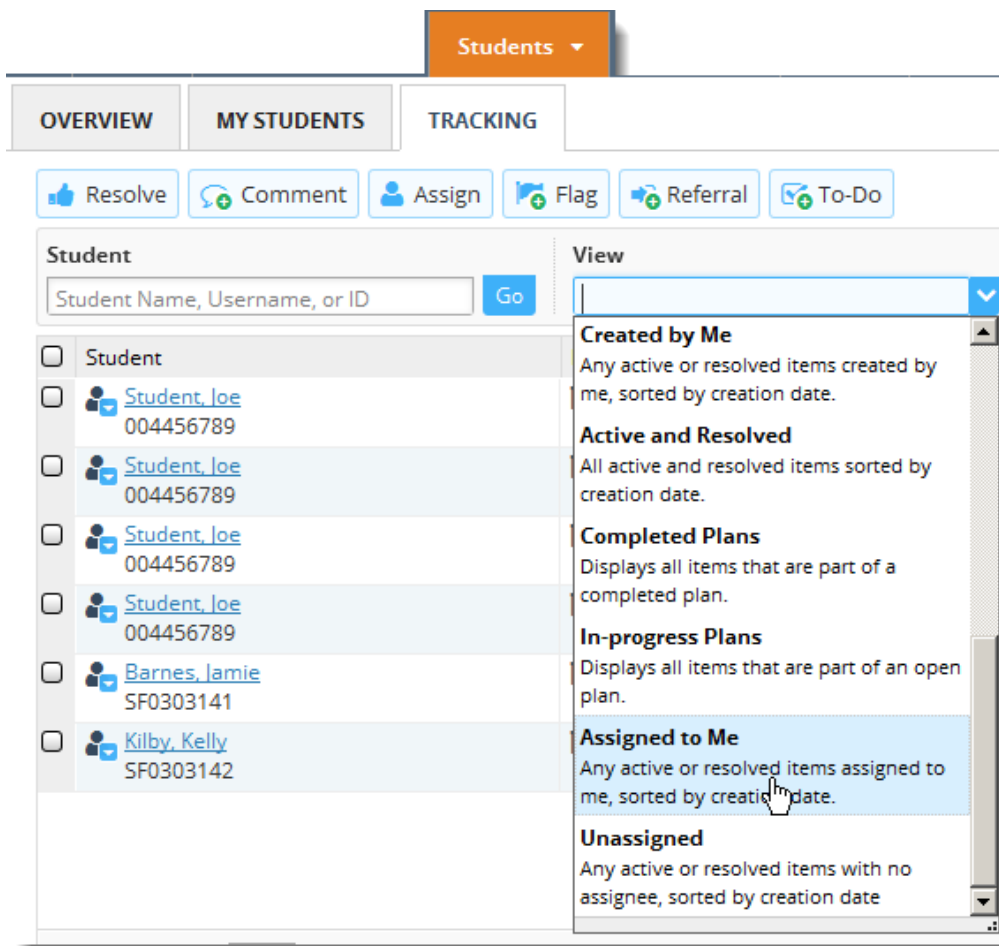
Use Additional Filters

1. Click the **Additional Filters** button.

2. Select the desired option for the **Assigned To** value:
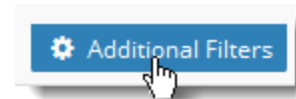
- **All assigned and unassigned**: clears any Assigned to filtering.
- **Me:** filters your student list to items currently assigned to you.
- **User:** filters your student list to items assigned to a specific user. Begin typing a name to populate the drop down with matching users.
- **Role:** filters your student list to items assigned to people with a specific role selected from the drop down list. For example you might filter on items assigned to people with an academic advisor role.
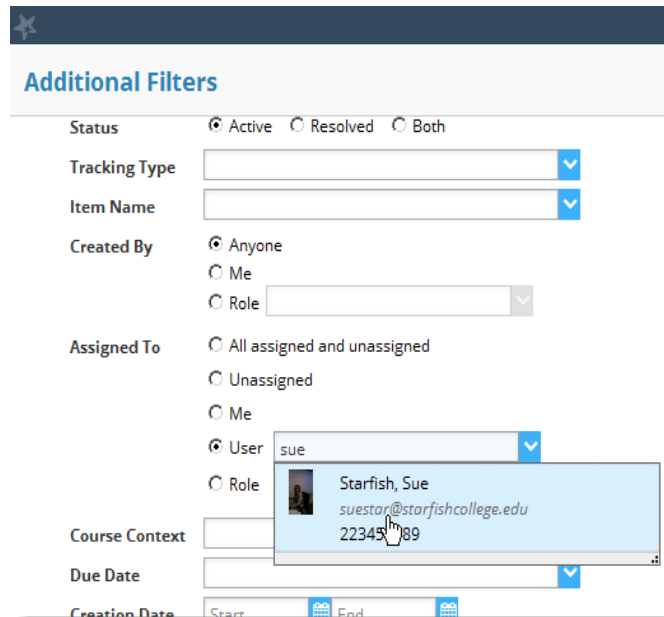
Review assignees

Assignments are displayed on the **Tracking** tab within the **Students** area in the **Assigned** column. This column lists both the date of the assignment and the person to whom the item is assigned. The column is blank for unassigned items.
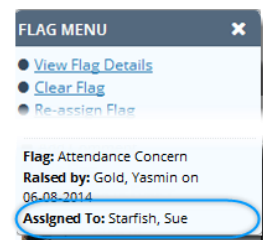
Assignees are also listed within each **Student Folder**'s **Tracking** tab in the **Assignee** column. The column is blank for unassigned items.
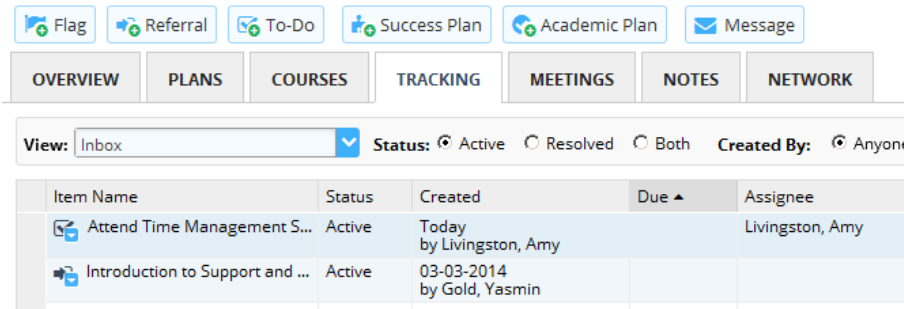

You will also find the assignee at the bottom of the mini-menu (e.g.) associated with the tracking item wherever it is displayed. If the flag is unassigned, this label will not appear on the menu.


Review assignment notes

Comments entered as part of assigning a tracking item are available on the **Notes** tab within the **Student Folder** and on the **Tracking** tab as part of the tracking item details.

On the Notes tab

Assignment comments display with the subject **Assignment Comment**. Click the expand icon (⊞) associated with an **Assignment Comment** to review the contents.
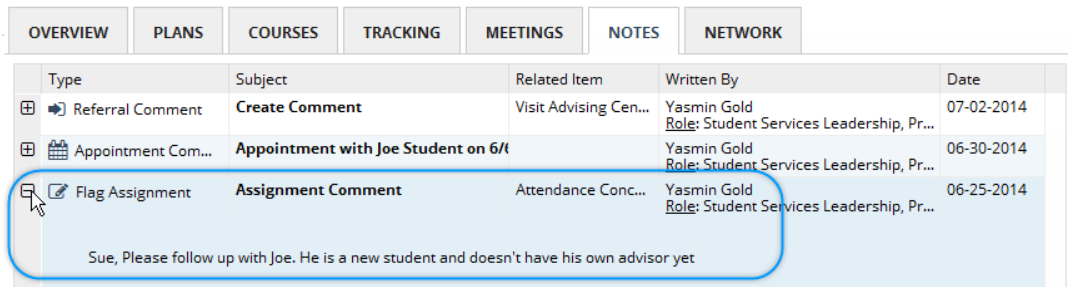
On the Tracking tab

To review tracking item details including assignment comments on the **Tracking** tab, open the tracking item details. You can either select the **View Details** option from the tracking item's mini-menu(e.g. View Flag Details), or navigate to the **Tracking** tab within the **Student Folder** and click the expand icon (⊞) associated with the tracking item.
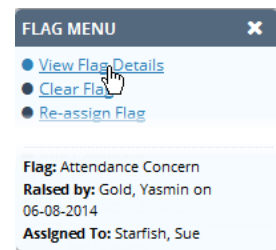
Assignment comments are listed within the **Journal** section of the tracking item details. The date, creator, and content of the assignment comment are included with the title **Assignment.**

Set Assignment related email notifications

Your administrator can configure the system to send (or not send) an email notification upon assignment for each tracking item. Similarly to other notifications for the tracking items you manage, you can set your profile to send assignment emails to you immediately, or as part of your summary.

Click on your name in the top right corner of your **Home** page to open your profile.

Select the **Email Notifications** tab and scroll to the **Tracking Item Notifications** section.

Select the frequency for receiving a summary of all tracking item activity that generates an email to you (either daily or weekly) under the "Send me a summary of tracking item activity" heading.

For the statement "Send me an immediate email whenever" check the box associatedwith " an item is assigned to me" if you want to receive assignment emails right away vs. waiting for the summary.

Document Version History

Version	Description of updates	Date of update
1.0	Created with release of Tracking Item Assignment feature for Starfish 4.7	7/3/14