

Purpose

This document is designed to assist staff with the function of reassigning an Action in TRIM9. You would use this function if you have an Action assigned to you and you are going on leave, or if your area uses Groups and you want to identify that you are working on a particular job.

Reassigning an Action

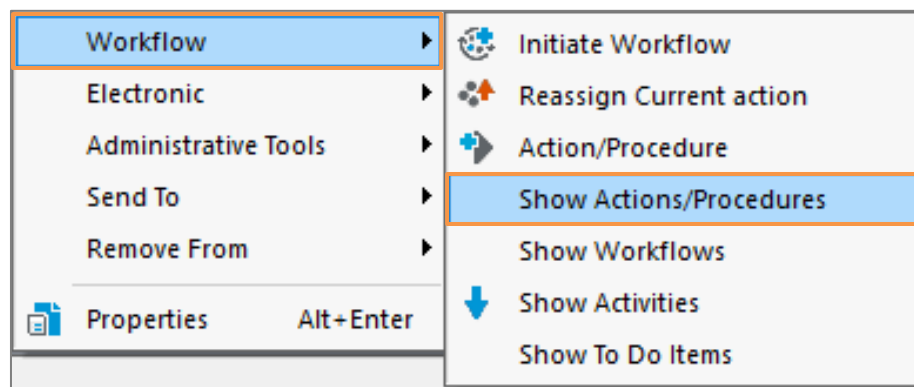
First, locate the record in TRIM9 which has the Action which you want to reassign. You can do this by:

- **Double-clicking** the .tr5 TRIM9 attachment (for the record) in the Action email notification and selecting **Open**
- OR
- Navigating to your Records Due Tray in TRIM9

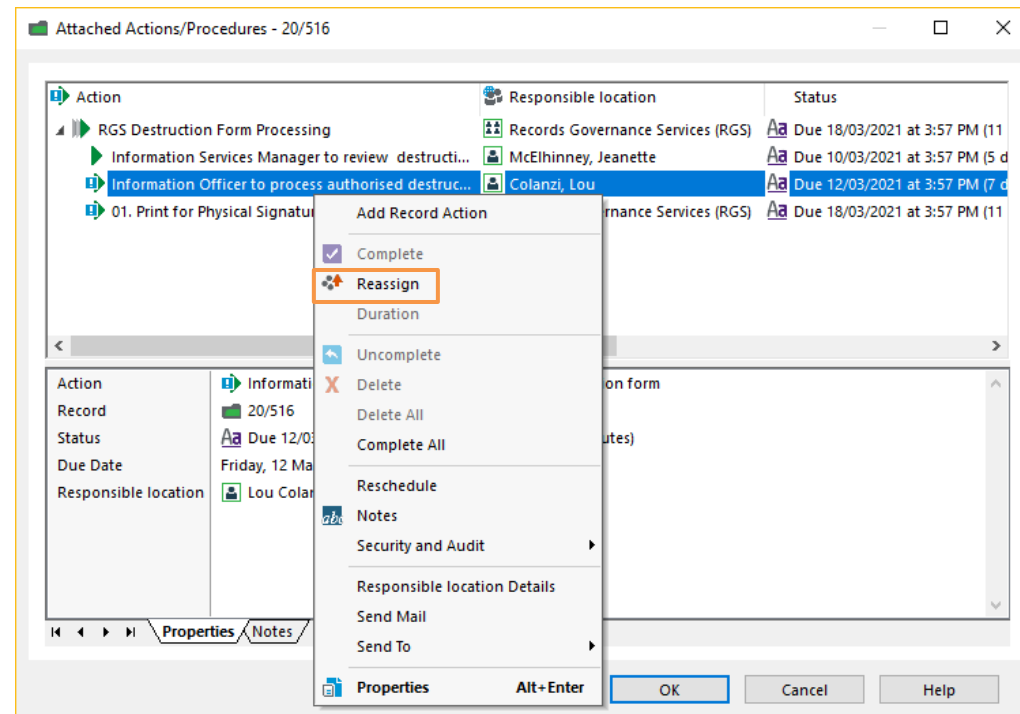
Hint: If you require instructions on how to perform either of the above two methods, please refer to the first page of the [TRIM9 – Quick Reference Guide – D15/230693 – Action Tracking – Completing an Action in TRIM9](#).

Then, to reassign an Action:

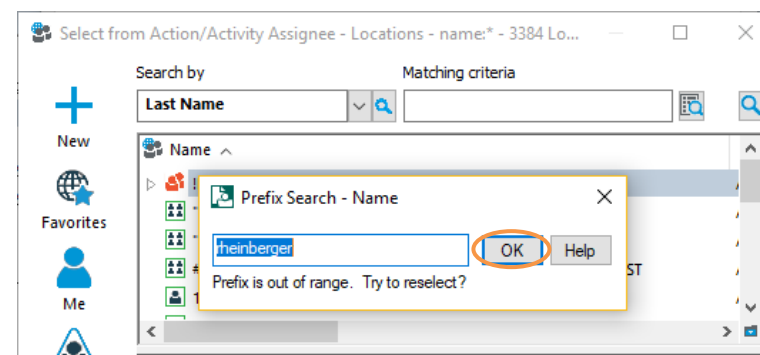
1. **Right-click** on the record → **Workflow** → **Show Actions/Procedures**



2. The **'Attached Actions/Procedures'** window will appear. **Right-click** on the Action you want to reassign and select **Reassign**:



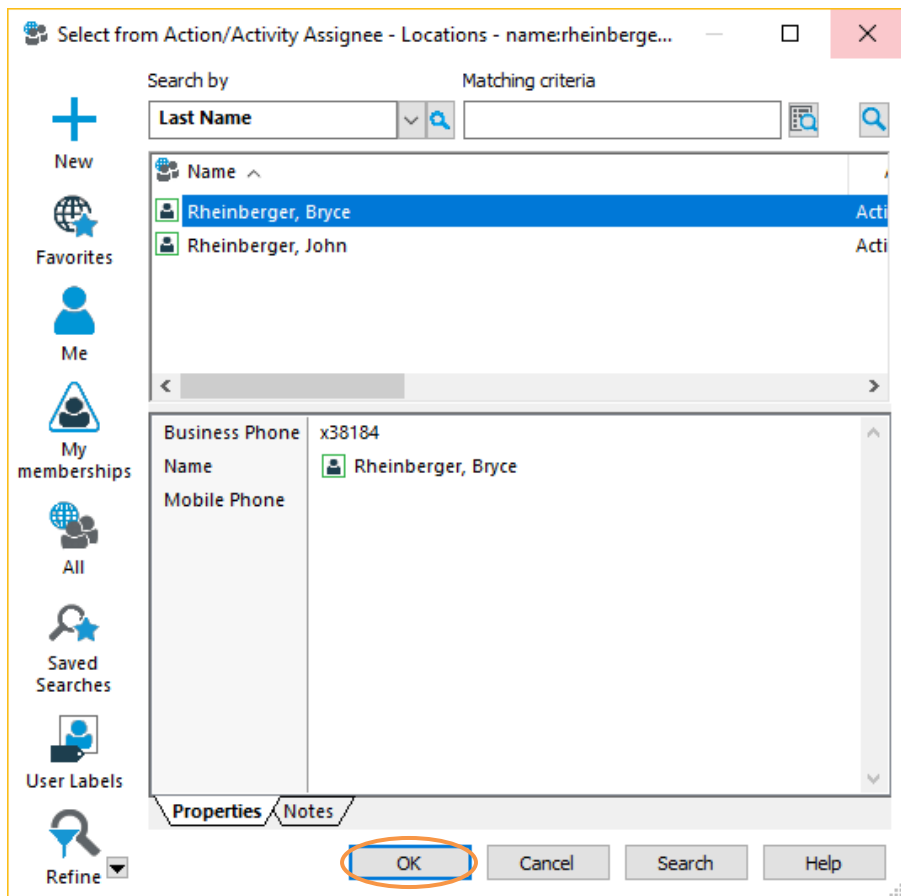
3. The **'Select from Action/Activity Assignee'** window will appear. **Don't click anywhere**, but instead just start typing the surname of the person or the name of the Position, Unit/Team, Group you wish to reassign the Action to. When you start typing the **'Prefix Search – Name'** window will pop up. Click **OK** to run the search:



Quick Reference Guide – Action Tracking – Reassigning an Action in TRIM9

- The list of matching Locations will appear. Click on the required Location to highlight it blue, then click **OK**:

Hint: Only select Locations represented by a green icon.



Select from Action/Activity Assignee - Locations - name:rheinberge...

Search by: Last Name

Matching criteria

Name

- Rheinberger, Bryce
- Rheinberger, John

Business Phone: x38184

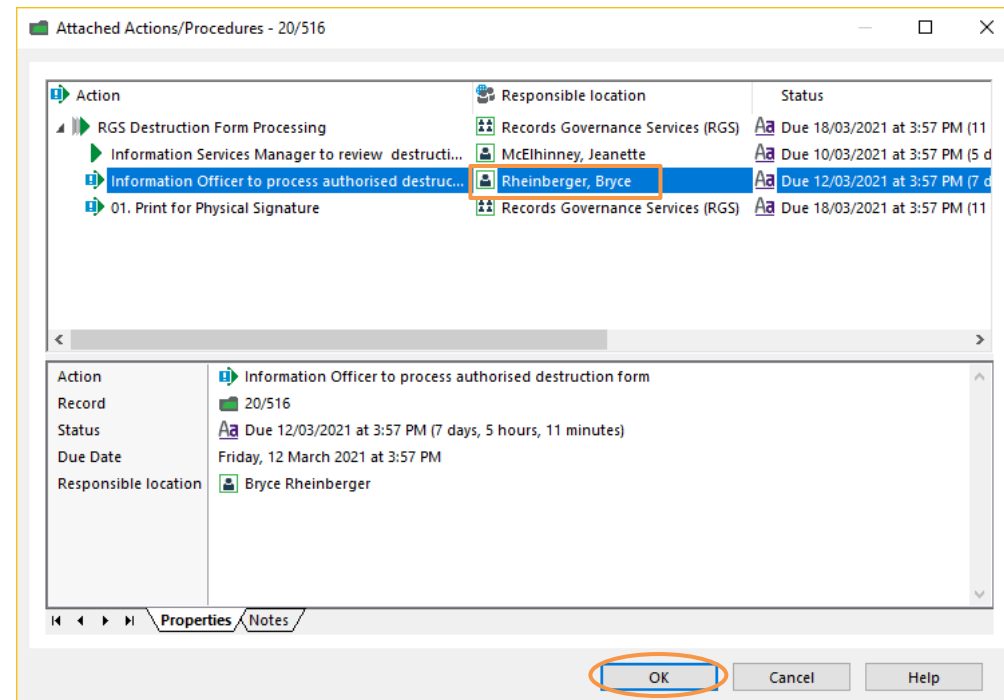
Name: Rheinberger, Bryce

Mobile Phone:

Properties Notes

OK Cancel Search Help

- Check that the Action has been reassigned as required, then click **OK** to close the 'Attached Actions/Procedures' window:



Attached Actions/Procedures - 20/516

Action	Responsible location	Status
RGS Destruction Form Processing	Records Governance Services (RGS)	Due 18/03/2021 at 3:57 PM (11 days, 11 hours, 11 minutes)
Information Services Manager to review destruction form	McElhinney, Jeanette	Due 10/03/2021 at 3:57 PM (5 days, 11 hours, 11 minutes)
Information Officer to process authorised destruction form	Rheinberger, Bryce	Due 12/03/2021 at 3:57 PM (7 days, 5 hours, 11 minutes)
01. Print for Physical Signature	Records Governance Services (RGS)	Due 18/03/2021 at 3:57 PM (11 days, 11 hours, 11 minutes)

Properties Notes

OK Cancel Help

Hint: The new Responsible Location will receive an email notification advising them they have had an Action reassigned to them which requires completion.