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E-Subro Hub Mass Reassign Reference Guide

January 2023

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Mass Reassign Access

To view the “Mass Reassign” menu option, a privilege will need to be assigned to your user login. There are several ways to access the Mass Reassign link.

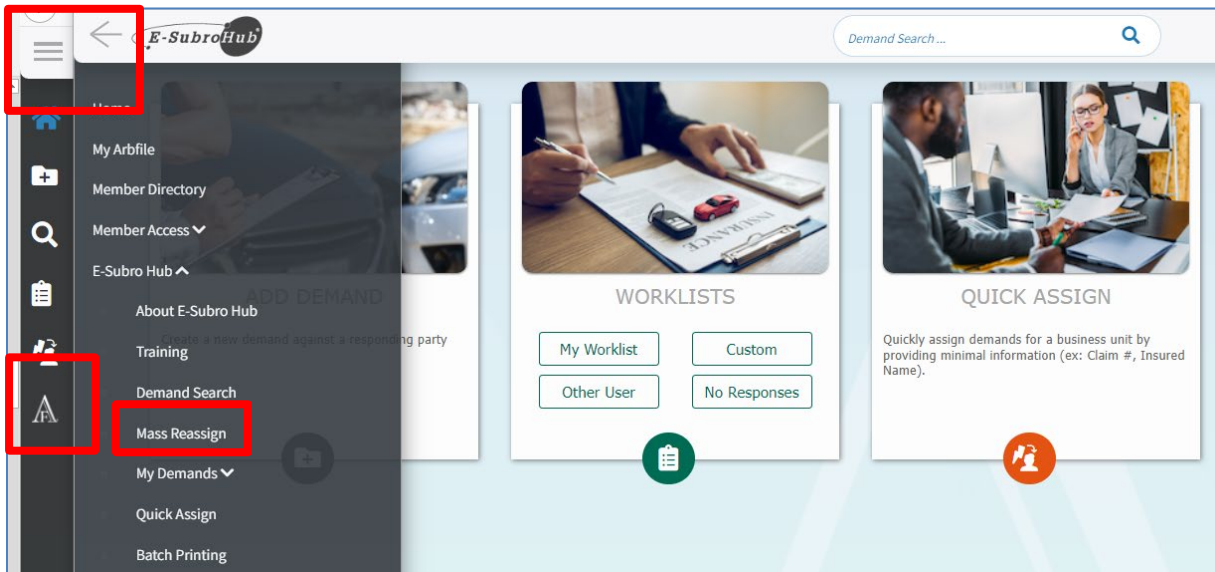
My Arbfile Page

From the “My Arbfile” page, click the E-Subro Hub drop-down menu, then “Mass Reassign.” While this is the most common path to start a Mass Reassign session, there are other locations on the E-Subro Hub platform.



Menu Links

E-Subro Hub contains menus with a “Mass Reassign” link. The AF logo on the side menu and the “hamburger” menu at the top-left corner will open a menu tree with the “Mass Reassign” option.



From User/Business Unit – Step 1

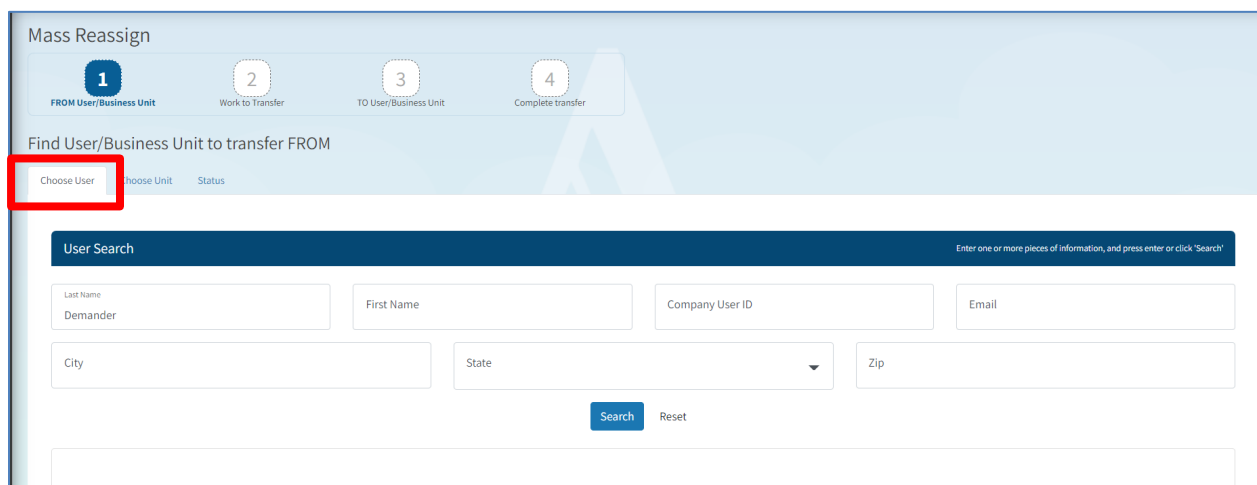
The “Find User/Business Unit” page will show the first step in a bulk assignment by selecting the current owner, which can be an individual associate or business unit.

Note: Before initiating a Mass Reassign, it may be beneficial to create an Open Demand Detail report documenting the list of demands to be moved from the current owner.

Choose User Tab

The “Choose User” tab allows the user to select a group of demands owned by an individual associate.

Enter one or more pieces of information and press enter or click “Search.”



Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer 3 TO User/Business Unit 4 Complete transfer

Find User/Business Unit to transfer FROM

Choose User Choose Unit Status

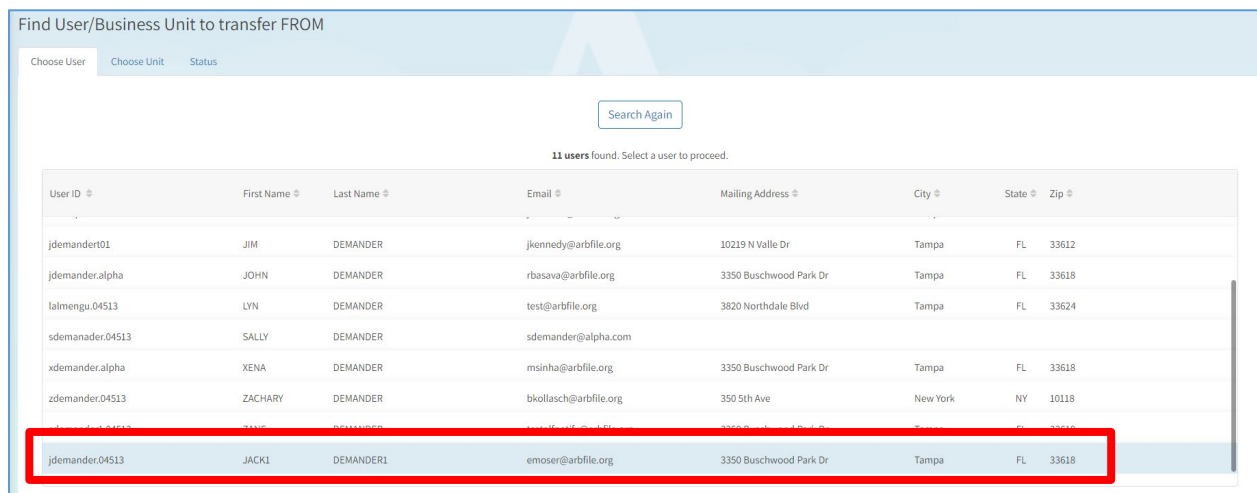
User Search Enter one or more pieces of information, and press enter or click 'Search'

Last Name Demander First Name Company User ID Email

City State Zip

Search Reset

Click on the correct associate result. If there are no demands or tasks owned by the selected associate, a notification will appear.



Find User/Business Unit to transfer FROM

Choose User Choose Unit Status

Search Again

11 users found. Select a user to proceed.

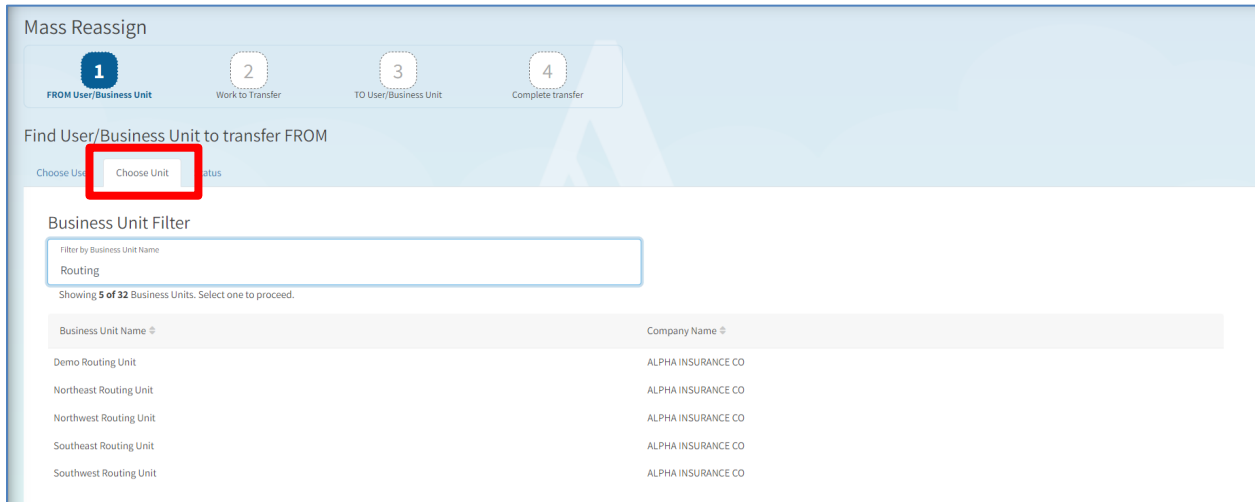
User ID	First Name	Last Name	Email	Mailing Address	City	State	Zip
jdemandert01	JIM	DEMANDER	jkennedy@arbfile.org	10219 N Valle Dr	Tampa	FL	33612
jdemander.alpha	JOHN	DEMANDER	rbasava@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618
lalimengu.04513	LYN	DEMANDER	test@arbfile.org	3820 Northdale Blvd	Tampa	FL	33624
sdemanager.04513	SALLY	DEMANDER	sdemander@alpha.com				
xdemander.alpha	XENA	DEMANDER	msinha@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618
zdemander.04513	ZACHARY	DEMANDER	bkollasch@arbfile.org	350 5th Ave	New York	NY	10118
jdemander.04513	JACK1	DEMANDER1	emoser@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618

Choose Unit Tab

The “Choose Unit” tab allows the user to select a group of demands owned by a business unit.

Enter a business unit name to narrow the search or select a business unit from the visible list.

Click on the correct business unit name. If there are no demands or tasks owned by the selected business, a notification will appear.



Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer 3 TO User/Business Unit 4 Complete transfer

Find User/Business Unit to transfer FROM

Choose User **Choose Unit** Status

Business Unit Filter

Filter by Business Unit Name

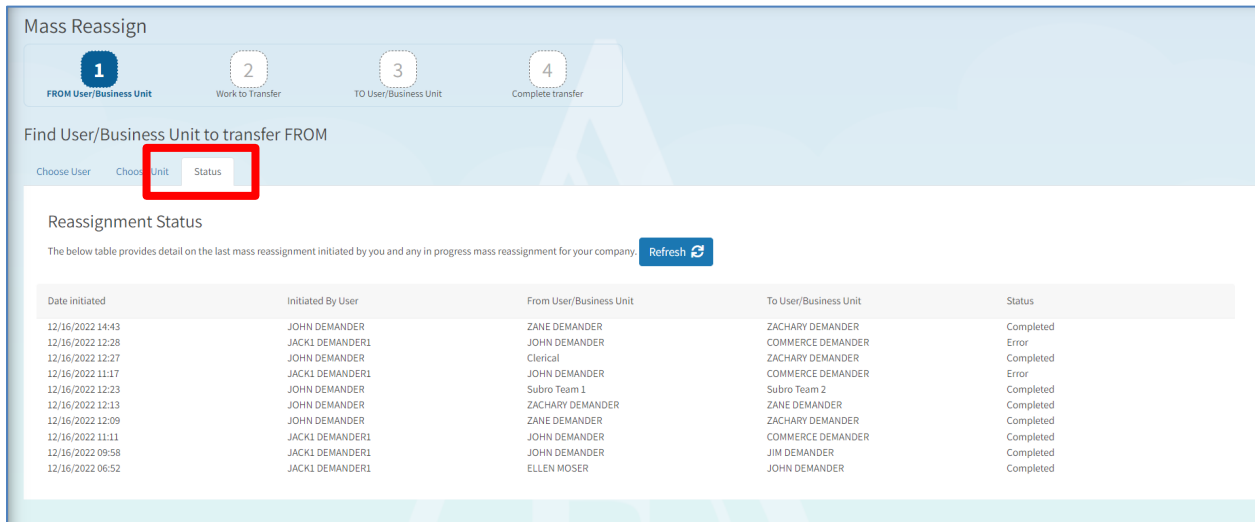
Routing

Showing 5 of 32 Business Units. Select one to proceed.

Business Unit Name	Company Name
Demo Routing Unit	ALPHA INSURANCE CO
Northeast Routing Unit	ALPHA INSURANCE CO
Northwest Routing Unit	ALPHA INSURANCE CO
Southeast Routing Unit	ALPHA INSURANCE CO
Southwest Routing Unit	ALPHA INSURANCE CO

Status Tab

The “Status” tab allows the user to view the status of previous assignment events.



Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer 3 TO User/Business Unit 4 Complete transfer

Find User/Business Unit to transfer FROM

Choose User Choose Unit **Status**

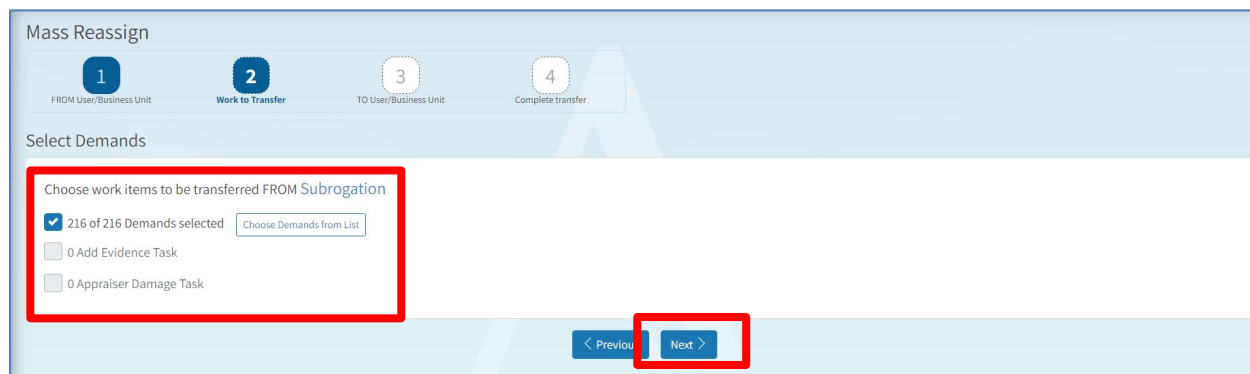
Reassignment Status

The below table provides detail on the last mass reassignment initiated by you and any in progress mass reassignment for your company. [Refresh](#)

Date initiated	Initiated By User	From User/Business Unit	To User/Business Unit	Status
12/16/2022 14:43	JOHN DEMANDER	ZANE DEMANDER	ZACHARY DEMANDER	Completed
12/16/2022 12:28	JACK1 DEMANDER1	JOHN DEMANDER	COMMERCE DEMANDER	Error
12/16/2022 12:27	JOHN DEMANDER	Clerical	ZACHARY DEMANDER	Completed
12/16/2022 11:17	JACK1 DEMANDER1	JOHN DEMANDER	COMMERCE DEMANDER	Error
12/16/2022 12:23	JOHN DEMANDER	Subro Team 1	Subro Team 2	Completed
12/16/2022 12:13	JOHN DEMANDER	ZACHARY DEMANDER	ZANE DEMANDER	Completed
12/16/2022 12:09	JOHN DEMANDER	ZANE DEMANDER	ZACHARY DEMANDER	Completed
12/16/2022 11:11	JACK1 DEMANDER1	JOHN DEMANDER	COMMERCE DEMANDER	Completed
12/16/2022 09:58	JACK1 DEMANDER1	JOHN DEMANDER	JIM DEMANDER	Completed
12/16/2022 06:52	JACK1 DEMANDER1	ELLEN MOSER	JOHN DEMANDER	Completed

Work to Transfer – Step 2

The “Work to Transfer” page will show the second step to a bulk assignment by selecting the demands to be moved. To move the entire inventory, simply click “Next.”



Choose Demands From List

“Choose Demands From List” will allow the user to select a portion of the inventory for assignment by activating filters to narrow the list.

The filters are similar to the filter options available for a Custom Search and will not be reviewed in detail in this document. However, the most common filter options would be Role (Demander or Responder) and Demand Status (Outstanding or Closed).

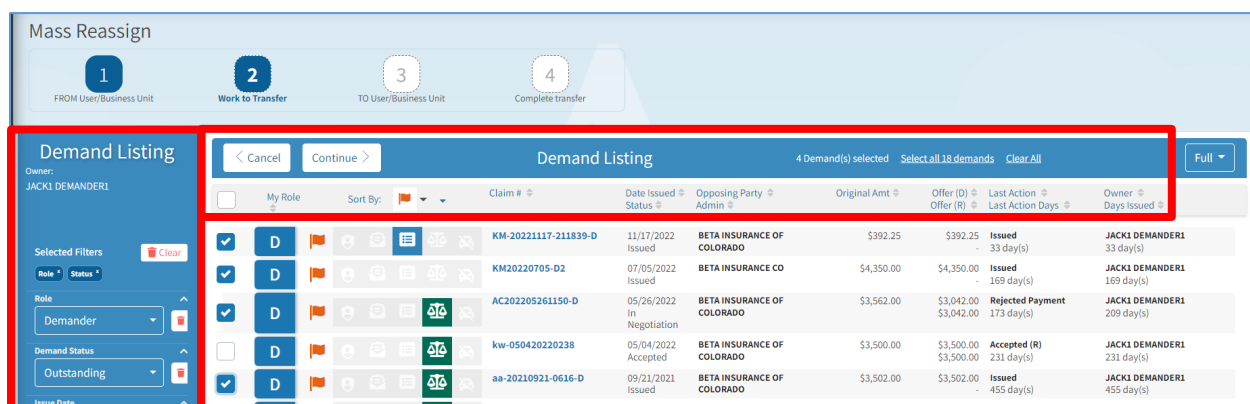
Click the “Apply Filters” button when the filters are selected to return a list of demands

Individual demands can be selected by clicking the check box to the left of the row.

All the demands on the page can be selected by clicking the check box at the top of the column or by clicking “Select all # demands” in the column header to highlight all the demands in the current list.

Clicking “Clear All” in the column header will remove the current highlighted demands.

“Cancel” will return the user to the prior page and delete any selections. “Continue” will move the user to the second step page where the number of demands will be listed.



Previous

The “Previous” option will move the user to the prior step.

Next

The “Next” option will move the user to the next step with the selected list of demands.

Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer 3 TO User/Business Unit 4 Complete transfer

Select Demands

Choose work items to be transferred FROM Subrogation

28 of 216 Demands selected

0 Add Evidence Task

0 Appraiser Damage Task

To User/Business Unit – Step 3

The “To User/Business Unit” page will show the third step to a bulk assignment by selecting the new owner, which can be an individual associate or business unit.

Choose User Tab

The “Choose User” tab allows the user to assign the demands to an individual associate.

Enter one or more pieces of information and press enter or click “Search.”

Click on the correct associate result.

Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer 3 TO User/Business Unit 4 Complete transfer

The following work items from Subrogation are selected for reassignment.

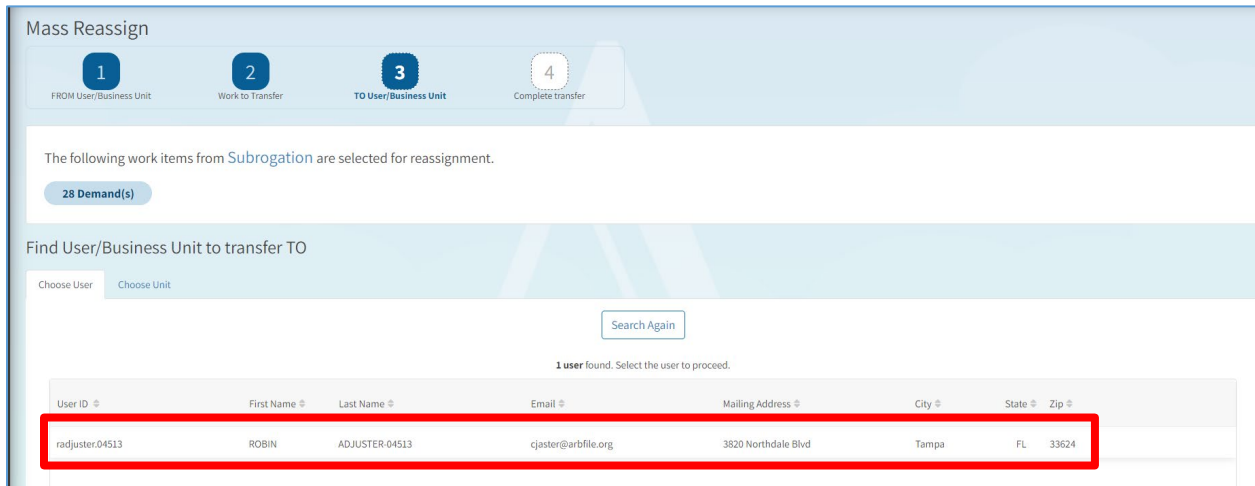
28 Demand(s)

Find User/Business Unit to transfer TO

User Search Enter one or more pieces of information, and press enter or click 'Search'

Last Name: Adjuster First Name: Company User ID: Email: City: State: Zip:

Click on the correct associate result.



Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer **3 TO User/Business Unit** 4 Complete transfer

The following work items from Subrogation are selected for reassignment.

28 Demand(s)

Find User/Business Unit to transfer TO

Choose User Choose Unit

Search Again

1 user found. Select the user to proceed.

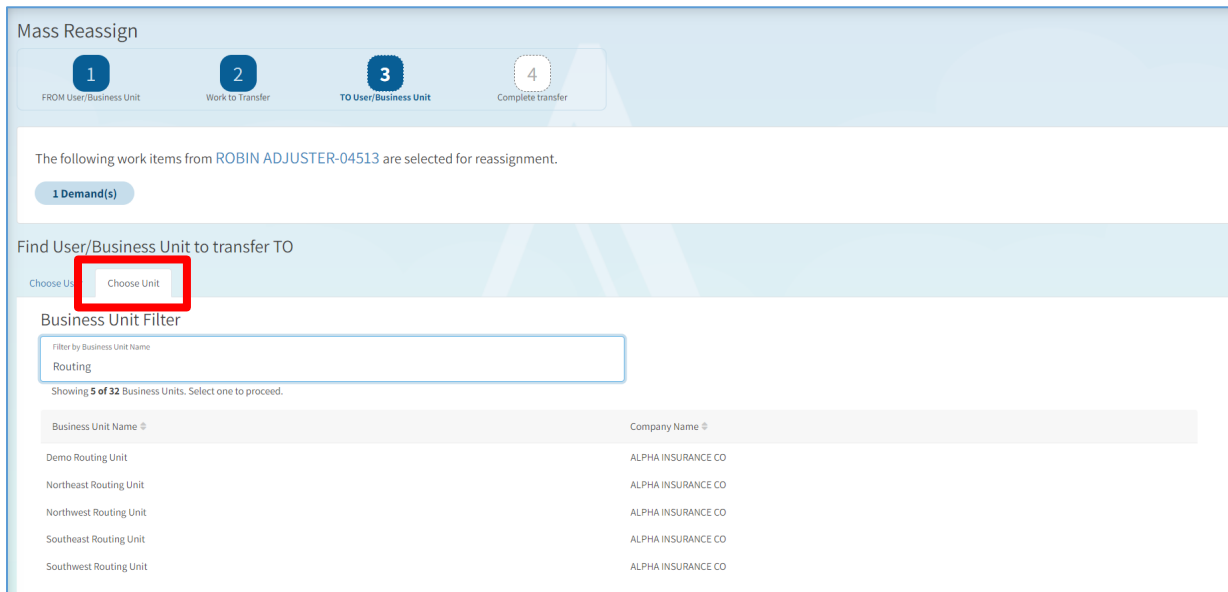
User ID	First Name	Last Name	Email	Mailing Address	City	State	Zip
radjuster.04513	ROBIN	ADJUSTER-04513	cjaster@arbfile.org	3820 Northdale Blvd	Tampa	FL	33624

Choose Unit Tab

The “Choose Unit” tab allows the user to assign the demands to a business unit.

Enter a business unit name to narrow the search or select a business unit from the visible list.

Click on the correct business unit name.



Mass Reassign

1 FROM User/Business Unit 2 Work to Transfer **3 TO User/Business Unit** 4 Complete transfer

The following work items from ROBIN ADJUSTER-04513 are selected for reassignment.

1 Demand(s)

Find User/Business Unit to transfer TO

Choose User **Choose Unit**

Business Unit Filter

Filter by Business Unit Name

Routing

Showing 5 of 32 Business Units. Select one to proceed.

Business Unit Name	Company Name
Demo Routing Unit	ALPHA INSURANCE CO
Northeast Routing Unit	ALPHA INSURANCE CO
Northwest Routing Unit	ALPHA INSURANCE CO
Southeast Routing Unit	ALPHA INSURANCE CO
Southwest Routing Unit	ALPHA INSURANCE CO

Complete Transfer – Final Step

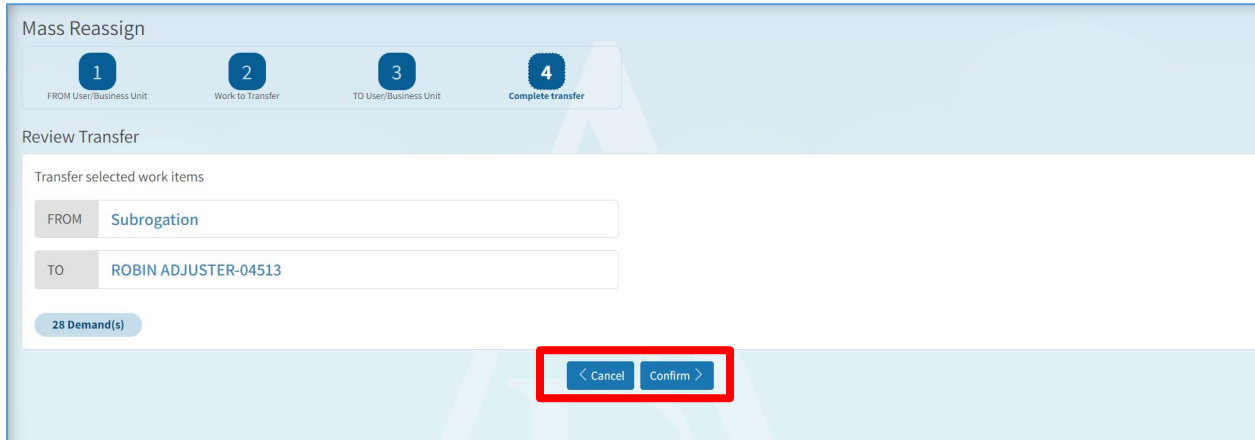
The “Complete Transfer” page will show the final step to a bulk assignment by confirming the “From” ownership, the “To” ownership and the number of demands to be moved.

Cancel

“Cancel” allows the user to return to a prior step or discontinue the process.

Confirm

“Confirm” allows the user to complete the transfer process.



Mass Reassign Results

The “Mass Reassign Results” page will allow the user to view the status of the transfer, or click “Ok” to move to another E-Subro Hub task.

