



## Admin tools user guide

A practical guide to organising teams, maintaining team-wide context and setting clear escalation pathways.

### What a Team Admin helps keep clear

- 1 People** Invite members and organise them into the right teams.
- 2 Context** Describe each team's roles, remit and working context.
- 3 Pathways** Set team-specific criteria for escalation, handover or moving on.

### Team-wide guidance needs care

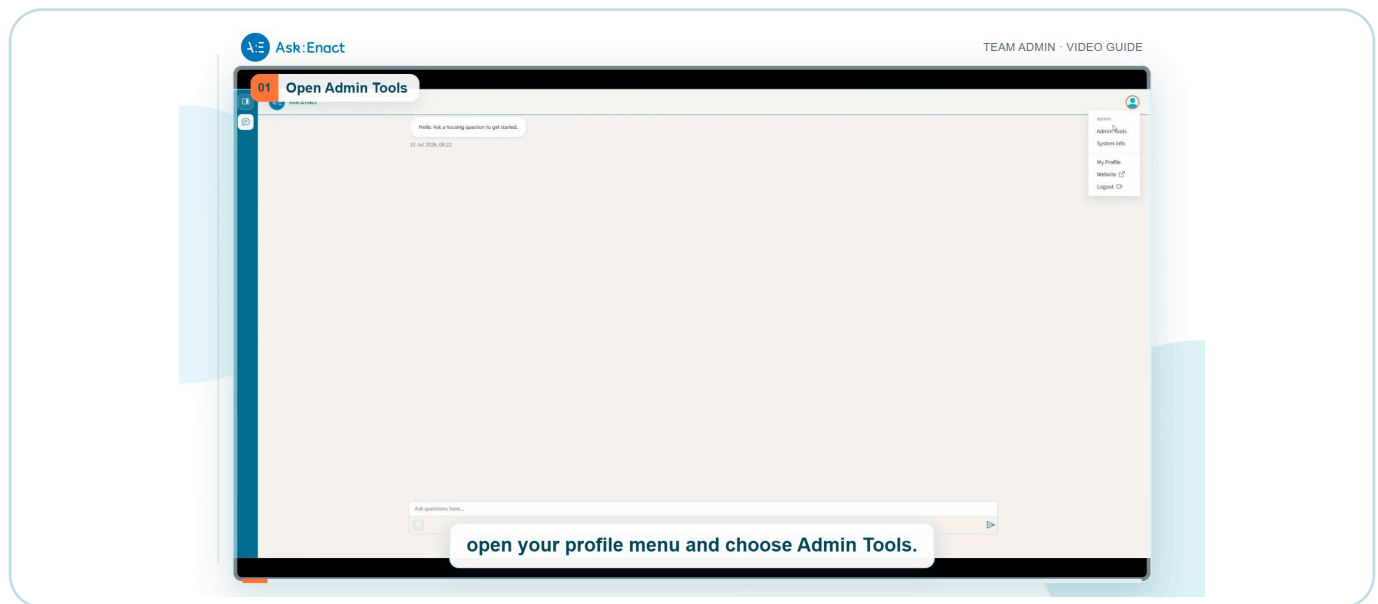
Team Prompt and Escalation Path affect every Ask:Enact interaction for members of that team. Keep them accurate, proportionate and relevant to the team's work.

Ask:Enact supports professional judgement. Team settings do not replace organisational policy, urgent procedures or the responsibility to act.

Version 1.0 | August 2026 | For Team Admins

# Open Admin Tools

Use the admin area when you need to review the organisation, manage people or change team-wide guidance.



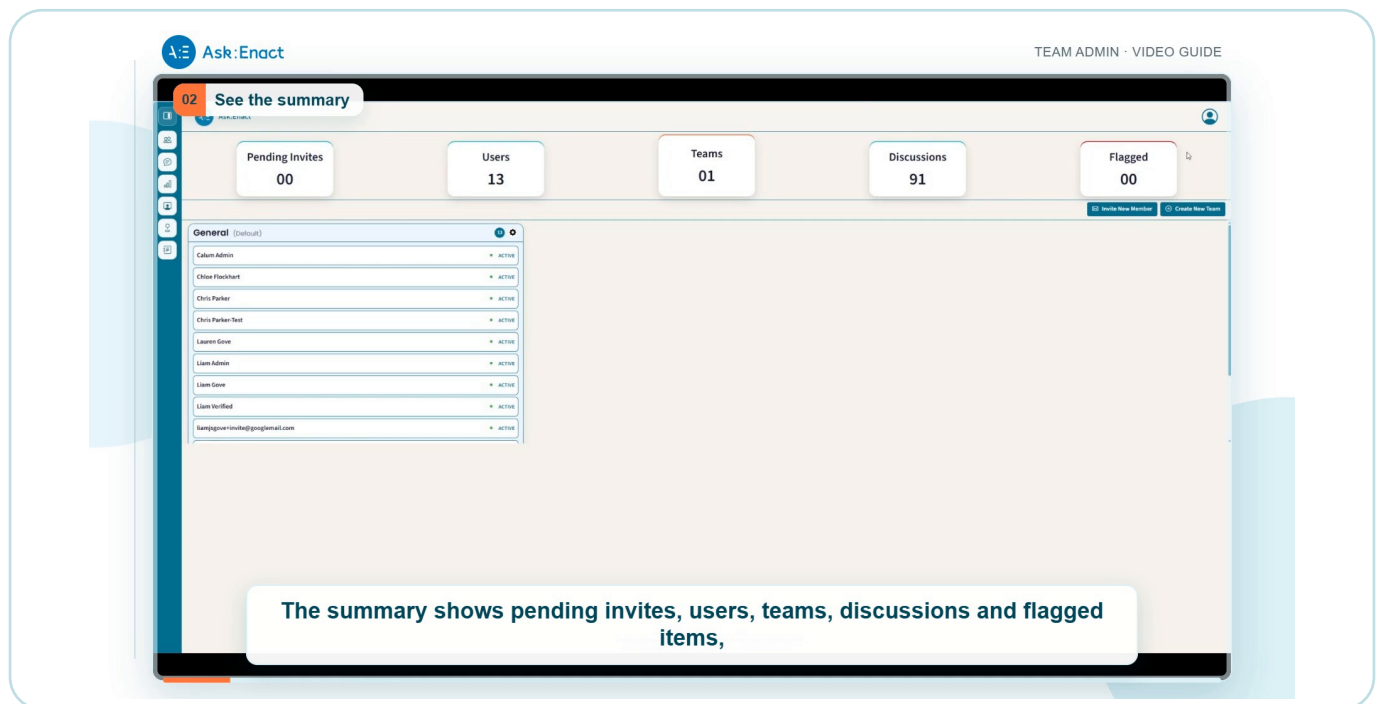
Product screenshot: open the profile menu and choose Admin Tools.

## The admin journey

- 1 **Review**  
Check pending invites, users, teams and discussion activity.
- 2 **Organise**  
Invite people, create teams and manage membership.
- 3 **Configure**  
Set the Team Prompt and Escalation Path for each team.
- 4 **Test**  
Save changes and try realistic questions to check the result.
- 5 **Review again**  
Update guidance when procedures, roles or team remit change.

# Read the dashboard

Start with the summary, then check which members sit in each team and whether any invitations are still pending.



Product screenshot: the dashboard summary and team list.

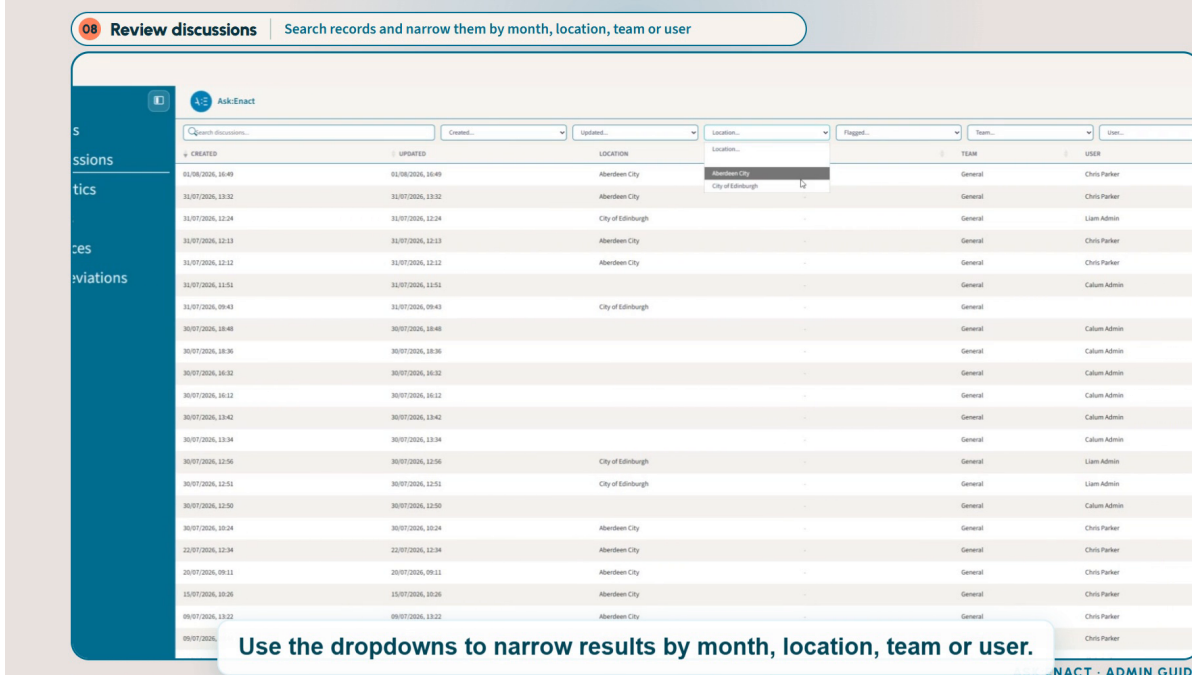
## What to check

- Pending Invites: people who have been invited but have not yet accepted.
- Users: people in the organisation.
- Teams: the default team plus any additional teams created by admins.
- Discussions: the number of discussion records available to review.
- Team lists: members and their current status. Use the cog beside a team to manage it.

The interface shows a Flagged count. Flagging is planned for a future update and should not be treated as an active workflow.

# Review Discussions

Use Discussions to review the records available to you and narrow the list to the activity you need.



**08 Review discussions** Search records and narrow them by month, location, team or user

Ask:Enact

Search discussions...

Created... Updated... Location... Location... Flagged... Team... User...

| CREATED           | UPDATED           | LOCATION          | LOCATION          | TEAM    | USER         |
|-------------------|-------------------|-------------------|-------------------|---------|--------------|
| 01/08/2026, 16:49 | 01/08/2026, 16:49 | Aberdeen City     | Aberdeen City     | General | Chris Parker |
| 31/07/2026, 13:32 | 31/07/2026, 13:32 | Aberdeen City     | City of Edinburgh | General | Chris Parker |
| 31/07/2026, 12:24 | 31/07/2026, 12:24 | City of Edinburgh | -                 | General | Liam Admin   |
| 31/07/2026, 12:13 | 31/07/2026, 12:13 | Aberdeen City     | -                 | General | Chris Parker |
| 31/07/2026, 12:12 | 31/07/2026, 12:12 | Aberdeen City     | -                 | General | Chris Parker |
| 31/07/2026, 11:51 | 31/07/2026, 11:51 | -                 | -                 | General | Calum Admin  |
| 31/07/2026, 09:43 | 31/07/2026, 09:43 | City of Edinburgh | -                 | General | -            |
| 30/07/2026, 18:48 | 30/07/2026, 18:48 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 18:36 | 30/07/2026, 18:36 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 16:32 | 30/07/2026, 16:32 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 16:12 | 30/07/2026, 16:12 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 13:42 | 30/07/2026, 13:42 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 13:34 | 30/07/2026, 13:34 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 12:56 | 30/07/2026, 12:56 | City of Edinburgh | -                 | General | Liam Admin   |
| 30/07/2026, 12:51 | 30/07/2026, 12:51 | City of Edinburgh | -                 | General | Liam Admin   |
| 30/07/2026, 12:50 | 30/07/2026, 12:50 | -                 | -                 | General | Calum Admin  |
| 30/07/2026, 10:24 | 30/07/2026, 10:24 | Aberdeen City     | -                 | General | Chris Parker |
| 22/07/2026, 12:34 | 22/07/2026, 12:34 | Aberdeen City     | -                 | General | Chris Parker |
| 20/07/2026, 09:11 | 20/07/2026, 09:11 | Aberdeen City     | -                 | General | Chris Parker |
| 15/07/2026, 10:26 | 15/07/2026, 10:26 | Aberdeen City     | -                 | General | Chris Parker |
| 09/07/2026, 13:22 | 09/07/2026, 13:22 | Aberdeen City     | -                 | General | Chris Parker |
| 09/07/2026, 13:22 | 09/07/2026, 13:22 | Aberdeen City     | -                 | General | Chris Parker |

Use the dropdowns to narrow results by month, location, team or user.

ASK:ENACT - ADMIN GUIDE

Product screenshot: discussion records and filters.

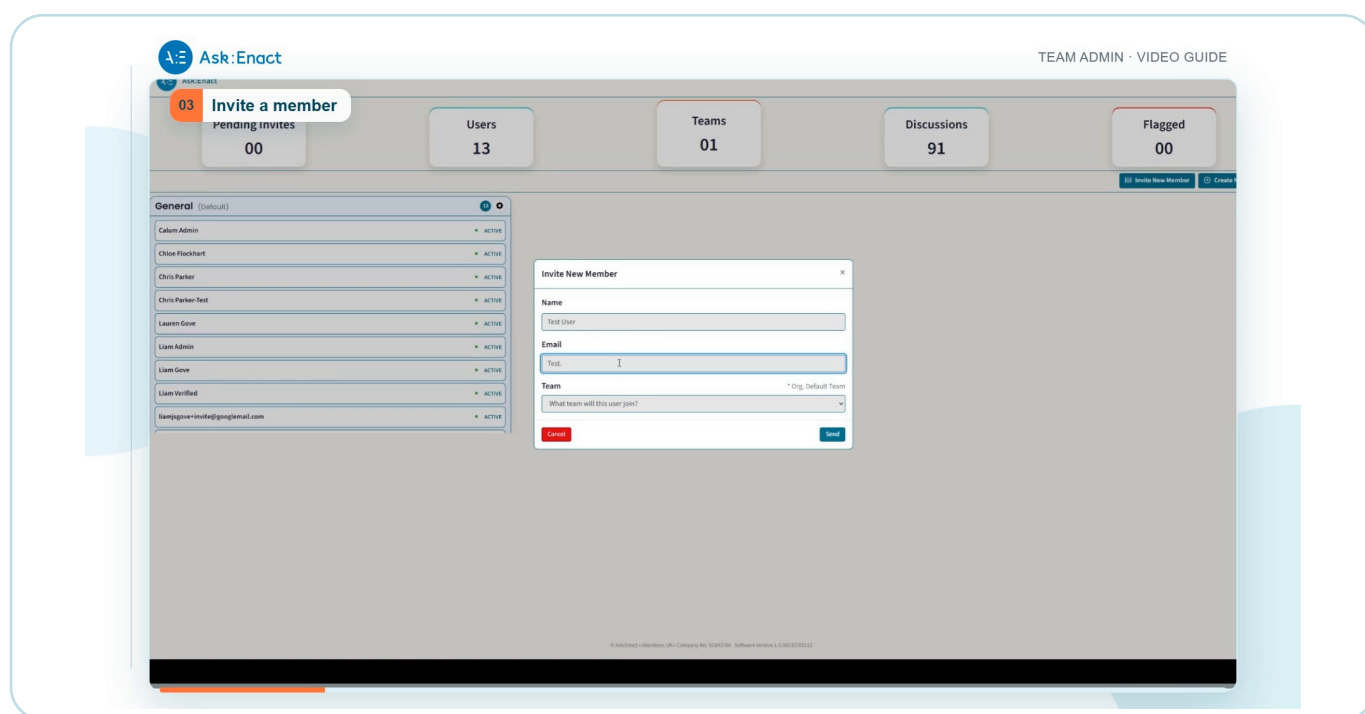
## Filter the list

- Search filters the records shown in the list; it does not search inside conversations.
- Use the dropdowns to narrow records by created or updated date, location, team or user.
- Use filters together when you need to understand activity for a particular team, place or period.
- Review records only for legitimate administrative and service-learning purposes.

Professional judgement and your organisation's information-handling rules still apply when reviewing records.

# Invite a member

Add a person to the organisation and place them in the team whose context and pathways should shape their interactions.



Product screenshot: Invite New Member.

## Invite in four steps

1

### Select Invite New Member

Open the invitation form from the dashboard.

2

### Enter their details

Add the person's name and email address.

3

### Choose the team

Select the team whose Team Prompt and Escalation Path should apply.

4

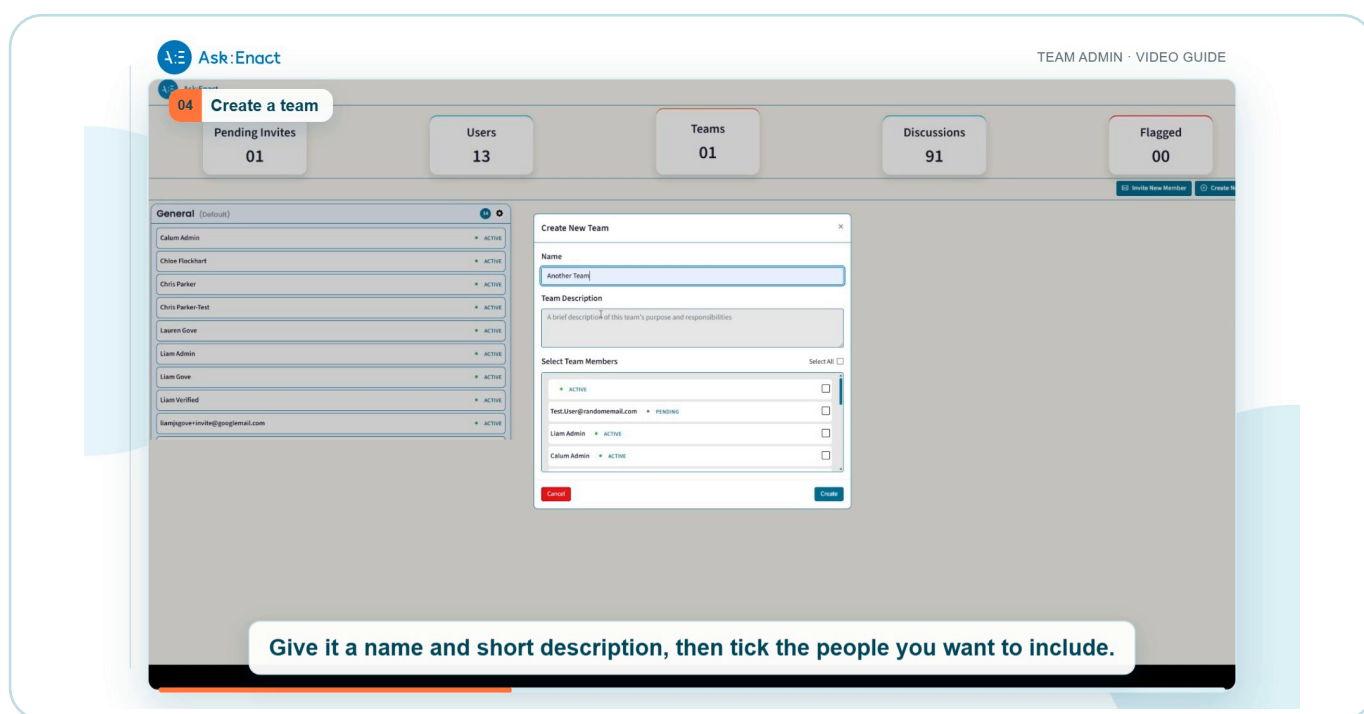
### Select Send

The invitation remains pending until the person accepts it.

Check the selected team before sending: its settings will affect every interaction after the member joins.

## Create a team

Create a separate team when a group has a distinct role, remit or pathway that should shape its Ask:Enact interactions.



Product screenshot: Create New Team.

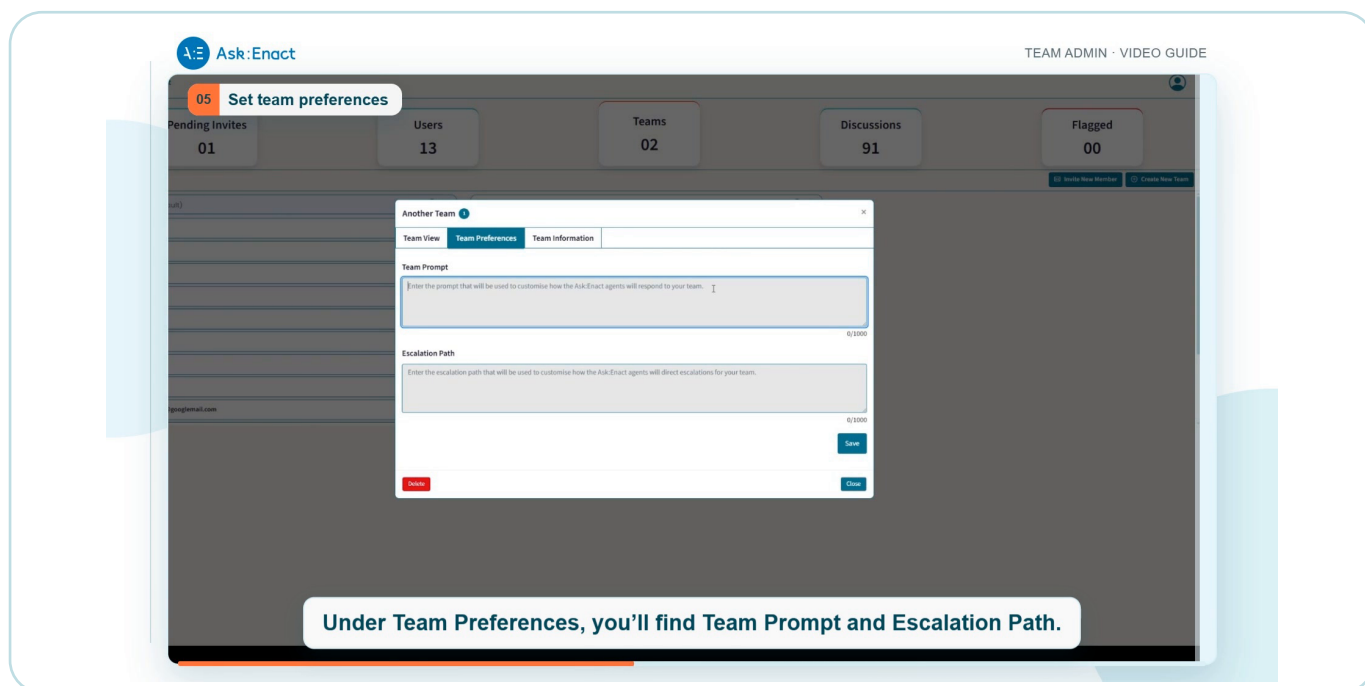
### Set the team up clearly

- Use a name that staff will recognise immediately.
- Describe the team's purpose and responsibilities in plain language.
- Select the members who should receive this team's context and escalation guidance.
- After creating the team, use its cog to open Team View, Team Preferences and Team Information.

The team member can set their own conversation type and response length in their user profile.

## Set team preferences

Open the cog beside a team, choose Team Preferences, add the guidance the team needs and select Save.



Product screenshot: Team Prompt and Escalation Path.

### Team Prompt

Standing context that applies to every interaction for the team.

- Who the team is and the roles it contains
- Its remit and professional boundaries
- How Ask:Enact should respond: friendly, direct or professional

### Escalation Path

Conditional guidance for situations that need a particular response.

- Criteria that should trigger action or discussion
- The manager, procedure or pathway to use
- When to hand over, stop or move on

Both fields affect every interaction for the team. Keep them concise, current and clearly separated by purpose.

# Write a useful Team Prompt

Give Ask:Enact the standing context it needs to frame guidance for the team's roles in every interaction.

## Use it for context - not response length

Describe the team, its roles, remit, preferred manner of response and professional boundaries. Individual users choose response length and interaction style in My Profile.

## Include five things

1

### Team

The service or team name.

2

### Roles

Who uses Ask:Enact in this team.

3

### Remit

What the team does and does not do.

4

### Response

The manner and tone Ask:Enact should use.

5

### Priorities

What guidance should prioritise for those roles.

## Copy and adapt

Team: [team or service name]

Roles: Members are [roles].

Remit: The team works with [people or situations] and is responsible for [purpose]. The team does not [important limit].

Response: Respond in a [friendly / direct / professional / supportive] manner. Use [plain or service-specific language] and a [practical / reassuring / confident] tone.

Priorities: Address the user as a [role]. Prioritise [risks, questions or actions]. Make clear that [decision or responsibility] remains with the professional and their organisation.

Boundaries: Do not assume the user has [power, qualification or responsibility they do not have].

## Keep out

Personal or case-specific information, copied policy text that may go out of date, response-length instructions, and conditional pathways that belong in Escalation Path.



## Team Prompt examples

Use these as patterns. Replace the wording with an accurate description of the real team, its roles and its boundaries.

### 1 Police

Team: Community Policing. Members are police officers and staff who may identify housing risk during routine contact. Respond in a direct, professional manner. Focus on safe, proportionate questions, immediate risk, relevant housing next steps and appropriate handover. Do not assume the user is a housing decision-maker.

### 2 Community nursing

Team: Community Nursing. Members are nurses supporting people at home. Respond in a supportive, professional manner. Relate housing issues to health, safety, treatment and the person's ability to remain at home. Suggest practical questions and referral routes while keeping clinical judgement and local procedures with the nurse.

### 3 Social work

Team: Social Work. Members support adults, children or families within the team's agreed remit. Respond in a respectful, strengths-based and professional manner. Focus on risk, support networks and coordinated action. Distinguish housing guidance from statutory social work decisions and keep professional judgement explicit.

### 4 Support or information service

Team: [service name]. Members provide information, advice and signposting. Respond in a friendly, direct manner. Focus on clarifying the immediate housing issue, giving practical next steps and relevant routes. Do not continue detailed questioning once the matter is outside the service's remit; use Escalation Path for the agreed handover.

A good Team Prompt makes the role and remit clearer without trying to reproduce an entire policy or procedure.

# Write an Escalation Path

Describe the team-specific criteria that should lead to manager discussion, a named pathway, handover or a clear move-on point.

## Make the condition and action explicit

An Escalation Path should tell Ask:Enact what to surface when a defined situation applies. It guides the response; it does not complete the escalation for the user.

## Keep it to three questions

1

### When?

What situation or criteria should make this guidance appear?

2

### What should they do?

Should the team member speak with a manager or follow a named pathway?

3

### When should they stop or move on?

State when the normal conversation should end and what happens next.

## Copy and adapt

If [situation or criteria], advise the team member to [speak with manager / follow named pathway / use named procedure]. If [stop or move-on point], do not continue the normal conversation; direct them to [next step].

## Keep it practical

Use specific criteria and approved wording. Do not include personal information or case details. Ask:Enact highlights the next step; the team member follows the procedure.

## Escalation Path examples

These templates show the structure only. Replace brackets with approved criteria, manager roles, systems and local procedures.

1

### Adult Support and Protection (ASP)

TRIGGER: If the team's approved ASP criteria may apply, or the user is unsure. ACTION: Advise the user to consult [manager or duty lead] and follow [ASP procedure]. STOP: Do not delay the organisation's safeguarding response while continuing in Ask:Enact. Use [emergency procedure] if immediate action is required.

2

### Police iVPD pathway

TRIGGER: If information meets or may meet the team's agreed iVPD criteria. ACTION: Tell the user to follow [local iVPD pathway] and consult [supervisor role] where required. RECORD: Use [approved police system or process]. Ask:Enact does not submit the referral or replace operational judgement.

3

### Discuss with a manager

TRIGGER: If [specific criterion] is present, repeated or unclear. ACTION: Advise the user to discuss the situation with [manager role] before taking [specified action]. HANDOVER: Follow [team procedure] if the manager confirms the threshold is met.

4

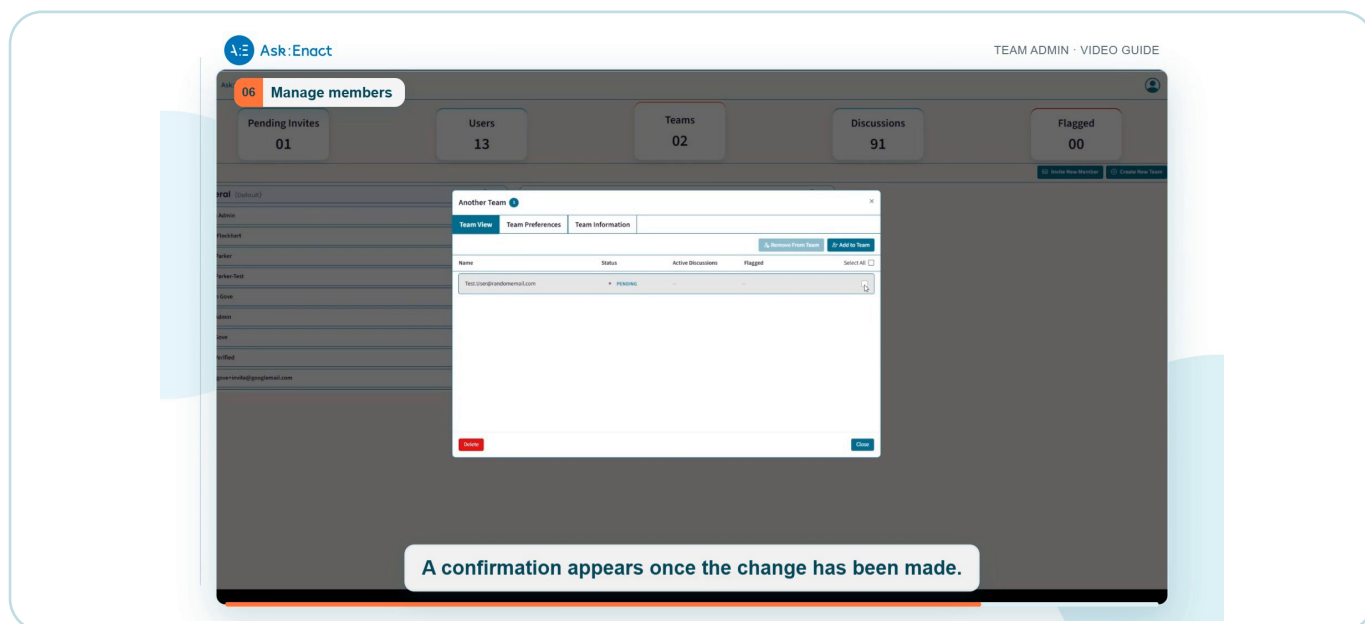
### Light-touch service move-on point

TRIGGER: When basic information or signposting has been provided, or the matter needs specialist assessment. ACTION: Explain the service's limit and provide [agreed route]. STOP: Do not continue exploratory questioning once the transfer criteria are met; advise contact with [service or team].

Escalation wording should make the user's next organisational step clearer, without delaying urgent action.

# Manage members and delete teams

Use Team View to change membership. Delete a team only when its separate context and pathways are no longer required.

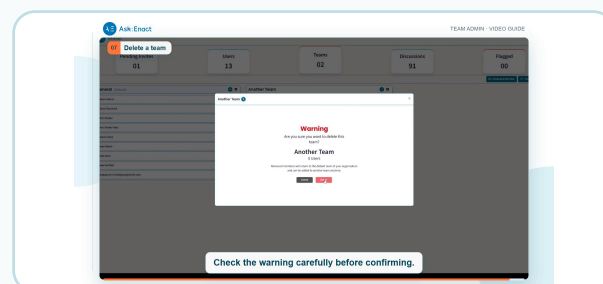


Product screenshot: select members in Team View, then add or remove them.

## Change membership

- ☐ Open the team cog and choose Team View.
- ☐ Tick the relevant names.
- ☐ Choose Add to Team or Remove From Team.
- ☐ Check the confirmation and the updated team list.

## Delete carefully



Read the warning before confirming. Removed members return to the organisation's default team and can be added to another team later.

After moving members, confirm they are receiving the correct Team Prompt and Escalation Path for their new team.

# Admin checklist

Use this check whenever you create a team or change team-wide guidance.

## BEFORE

### Confirm the source

- ☐ Confirm the team's purpose, roles and remit.
- ☐ Use current approved procedures and pathways.
- ☐ Remove personal information and case-specific details.

## WRITE

### Separate context from escalation

- ☐ Put standing team context and roles in Team Prompt.
- ☐ Put conditional criteria and pathways in Escalation Path.
- ☐ Use clear triggers, actions, urgency and handover points.

## TEST

### Check realistic interactions

- ☐ Save the changes before testing.
- ☐ Try common situations and edge cases for that team.
- ☐ Check the intended context and pathway appear clearly.

## REVIEW

### Keep guidance current

- ☐ Review regularly and after policy or pathway changes.
- ☐ Update guidance when team roles or remit change.
- ☐ Keep professional judgement and urgent procedures explicit.

## Before you finish

Make one final check that the right people are in the team and that its Team Prompt and Escalation Path are accurate for every interaction they may start.