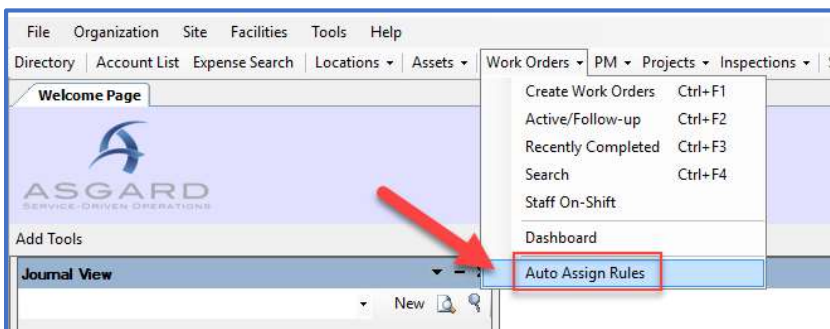## Using Auto Assignment

Auto Assign Rules and Groups work together, along with Staff On-Shift, to automatically assign Standard Work Orders, at the expected start, based on business criteria. Rules can be set up for a consolidated site, or for a single Facilities Department. Auto Assign Rules allow department managers to determine who should be assigned to specific work, removing the responsibility of deciding who should be assigned from the operators, reducing assignment time, and increasing responsiveness and resolution.

Overview of Auto Assign Rules Set-Up
Auto Assign Rules for a single Facilities Department can be accessed from the Work Orders menu.

Note: All users with Work Order View permissions can view the existing Auto Assign Rules. Only Katana Team Members can create, edit, or delete Rules.

Rules can be created using any combination of the following criteria:

- Group (Smart or Standard)
- Work Order Type or Work Order Department
- Work Order Task or Work Order Category
- Reported By
- Time of Day
- Day of Week
- Locations/Zones

Rules can be assigned a Priority. If a newly created work order meets the criteria of two or more rules, it will be assigned in order of priority (e.g. #1, then #3, then #17).

Rules also carry a flag for 'Allow Assignments to Off-shift users.' If the flag is checked, the rule will assign work orders to anyone in the associated group, regardless of whether or not they are on-shift, or in a Break or Off-Shift status. This is useful in assigning to specialized team members or managers.

Note: Once a rule is added, it will begin working immediately. The rule will not apply to work orders already created, but it will apply to Future Work Orders, assigning to one of the available users at the time the work order is expected to start. (If the rule does not begin working immediately, see the Troubleshooting Auto Assign section, below.)

Overview of Auto Assign Groups

Auto Assign Groups are manually (Standard Groups) or automatically created (Smart Groups) groups of candidate assignees for use with Auto Assign Rules.

Users in a rule's associated group must be in an On-Shift and Ready status to receive work orders, unless the rule has the 'Allow Assignments to Off-shift users' flag checked.

To access Groups in the main application, open the Site menu, and select Auto Assign Groups.
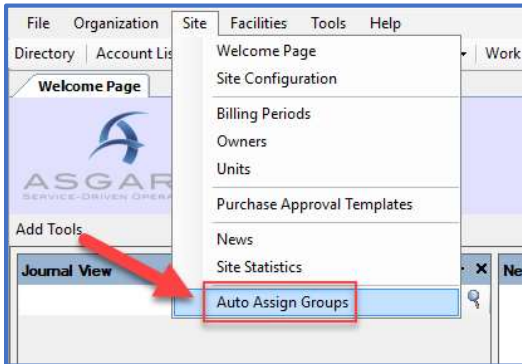
Note: Users must have Edit Shifts permissions in order to View Groups and Add or Delete members. Users must have Site Admin permissions to Add or Delete Groups.

Smart Groups vs Standard Groups

Smart Groups are automatically created (by Asgard) for each department within an organization, and populated with all users on-shift for that department in Staff On-Shift.

Standard Groups are created by System Admins, Site Admins or Org Admins, and may include any combination of assignees (not limited by the user's department). The selected users must have "Is Assignee?" privileges.

The Groups and their types can be seen on the Auto Assign Groups page in the Main App, and on the Auto Assign Group detail screen.
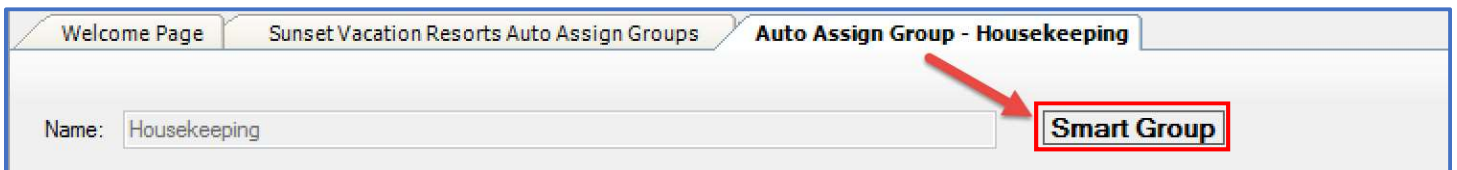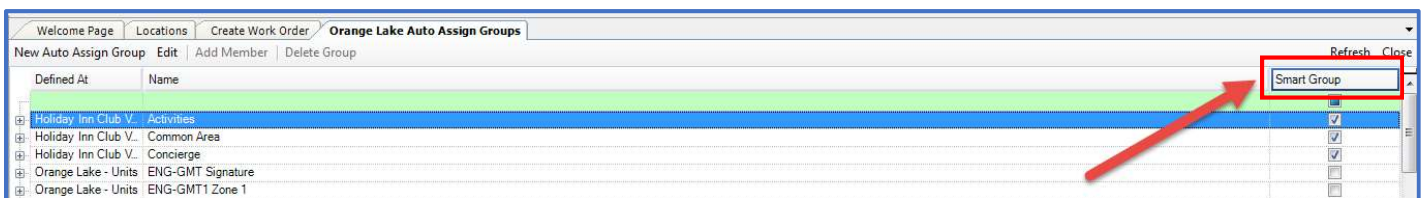
Note: The members of the Smart Group are not displayed, but members of a Standard Group can be viewed.

Standard Groups can be set-up at consolidated (parent) and non-consolidated sites; all sites below the consolidated site (child sites) will inherit consolidated site groups.

- When creating Groups at parent sites (e.g. Consolidated Sites), you will only be able to add users who have permissions at underline all child sites.
- When creating Groups at a single site (e.g. Sunset West), you will be able to add all users who have permissions at that specific site.

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The site where the group is created is the "owner" site for the group. The group can only be deleted from the owner site. Any site below the owner site can add users to the group.

The "owner site" can be determined from the Auto Assign Groups list, in the Defined At column:

"Defined At" column indicated at left – "Group Name" on the right

Both Smart and Standard Groups are automatically closed when an Organization or Organizational Department is deleted.

Using Auto Assign

- Auto Assign will automatically dispatch work orders that meet a rule's criteria to the members of the rule's group in a load-balancing fashion. Asgard will look at the number of Incomplete Work Orders each member of a group currently has assigned, and will dispatch to the team members with the fewest in-progress tasks. If all team members have the same number of Incomplete Work Orders, Asgard will dispatch in a round-robin fashion.
- In order for a user to be eligible to be assigned a work order, s/he must be a member of the rule's group and On-Shift and in a Ready Status on the Staff On-Shift page for Standard Work Orders.
- Auto Assign currently only dispatches Standard Work Orders.
- Users who are in an Ending Shift or Break status will not be assigned work orders, unless the 'Allow Assignments to Off-shift users' flag is checked.
- Automatically assigned work orders can be manually reassigned at any time.
- Sites using Assign at Create can override the firing of a rule by assigning a work order during creation.

Troubleshooting Auto Assign: What to Do If "It Isn't Working"

Because the Auto Assign functionality is so complex and intricate, it can be difficult to pinpoint the cause when a rule isn't firing as expected. When experiencing an issue, the following areas can be investigated immediately at the site to look for potential causes.

- Are there users in the Group who are in a Ready status on the Staff On-Shift page?
  - This can easily be investigated by opening the Auto Assign Rules page. Then click the Refresh with Availability button in the upper right corner of the page.
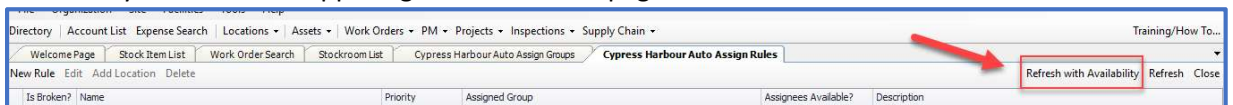
  - A rule that has the Assignees Available? field unchecked had no valid assignees at the time it was run.
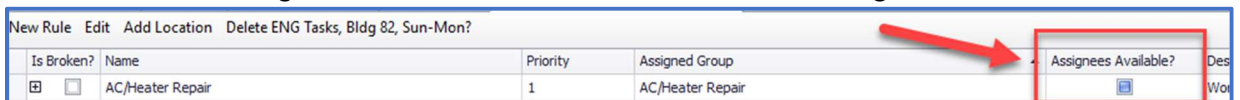
  - **Note:** Pulling Available Assignees is a resource-intensive search, so Asgard will only update that field if the Refresh with Availability button is clicked.

- Does the Group assigned to a Rule match the Group that you expect?
    - The Group associated with each Rule can be found on the Work Orders > Auto Assign Rules page.

- Is the rule Broken?
    - A rule that is Broken can no longer run because a change elsewhere in the system modified the criteria. For example, a deleted model task that was used in a rule will mark the rule as broken and won't run again until the criteria are updated.

    - A Broken rule flag should rarely be seen.
    - If a rule is Broken, please immediately reach out to your Katana Support Heroes. They are able to work with you to fix it.

If, after examing these possible causes, the rule is still not working as expected, please contact us at support@katanasoft.com to continue troubleshooting. We want Asgard to work for you!