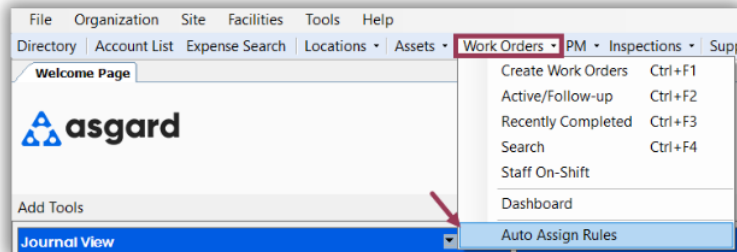


Auto Assign Rules and Groups work seamlessly with Staff On-Shift to automatically assign Standard Work Orders at the expected start time based on business criteria. With Auto Assign Rules, department managers control and automate task assignments, reducing the burden on operators, minimizing assignment time, and improving 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. Click **Auto Assign Rules**.



All users with Work Order View permissions can view the current Auto Assign Rules. However, **only** members of the Asgard Team have the ability to create, edit, or delete these Rules.

Rules determine work order assignments based on 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 based on priority order (e.g. #1, then #3, then #17).

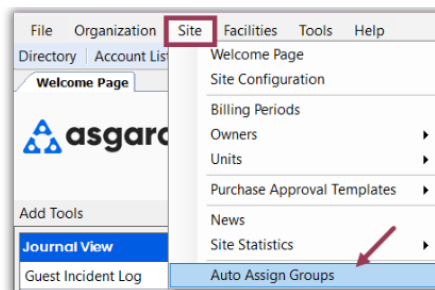
Rules also carry a flag for **Allow Assignments to Off-shift** users. If the flag is checked, the rule will assign work orders to anyone in the associated group, regardless of whether or not they are On-Shift, On Break, or Off-Shift status. This is useful when assigning tasks to specialized team members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



Once a rule is added, it takes effect immediately. However, it will only apply to future work orders and will not retroactively assign existing ones. New work orders will be assigned based on user availability at the expected start time. (If a rule is broken or not working correctly, contact support@asgardsoftware.com.)

Overview of Auto Assign Groups

To find Groups within the main application, navigate to the Site menu and select **Auto Assign Groups**. Auto Assign Groups consist of **"Smart Groups"** or **"Standard Groups"**.



Smart Groups vs Standard Groups

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

Standard Groups are created by Asgard Customer Support and can include any combination of assignees, regardless of department. Selected users must have "Is Assignee?" permission.

For users to receive work orders from a rule's associated group, they must be in On-Shift-Ready status, unless the rule has the Allow Assignments to Off-Shift Users option enabled.

The Groups and their types can be seen on the Auto Assign Groups page and the Auto Assign Group detail screen.

Defined At	Name	Smart Group
Training Org	Front Office	<input checked="" type="checkbox"/>
Training Org	Housekeeping	<input checked="" type="checkbox"/>
One Valley Lodge	HSKP Block 1 (Assist)	<input type="checkbox"/>
Members		
Christian, Michael		
Davis, Diana		
Silva, Agueda		
One Valley Lodge	HSKP Block 1 (Deliver)	<input type="checkbox"/>

Standard Group members can be viewed and edited, while Smart Group members are not displayed. Users must have Edit Shifts permissions to view groups and add or remove members from Standard Groups.



To Add or Delete Groups contact support@asgardsoftware.com

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

At **parent sites** (e.g., Consolidated Sites), group members must have permissions at **all child sites**.

At **single sites** (e.g., One Valley Lodge), any user with permissions at that site can be added."

The site (parent or child) where the group is created is the **owner site**. The group can only be deleted from the **owner site**. Either site can add users to the group.

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

The **Defined At** column is indicated at the left – The **Group Name** on the right

Defined At	Name
One Valley Lodge	ENG Block 1 (Assist)
One Valley Lodge	ENG Block 1 (Repair)

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

Auto Assign Synopsis

- Auto Assign dispatches work orders based on workload, prioritizing team members with the fewest incomplete tasks. If all have the same, it assigns in a round-robin fashion.
- To receive assignments, users must be in the rule's group, On-Shift, and in Ready Status on the Staff On-Shift page.
- Auto Assign only applies to Standard Work Orders.
- Users in Ending Shift or Break status won't receive assignments unless the Allow Assignments to Off-Shift users flag is enabled.
- Auto-assigned work orders can be manually reassigned anytime.
- Sites using Assign at Create can override Auto Assign by assigning a work order during creation.