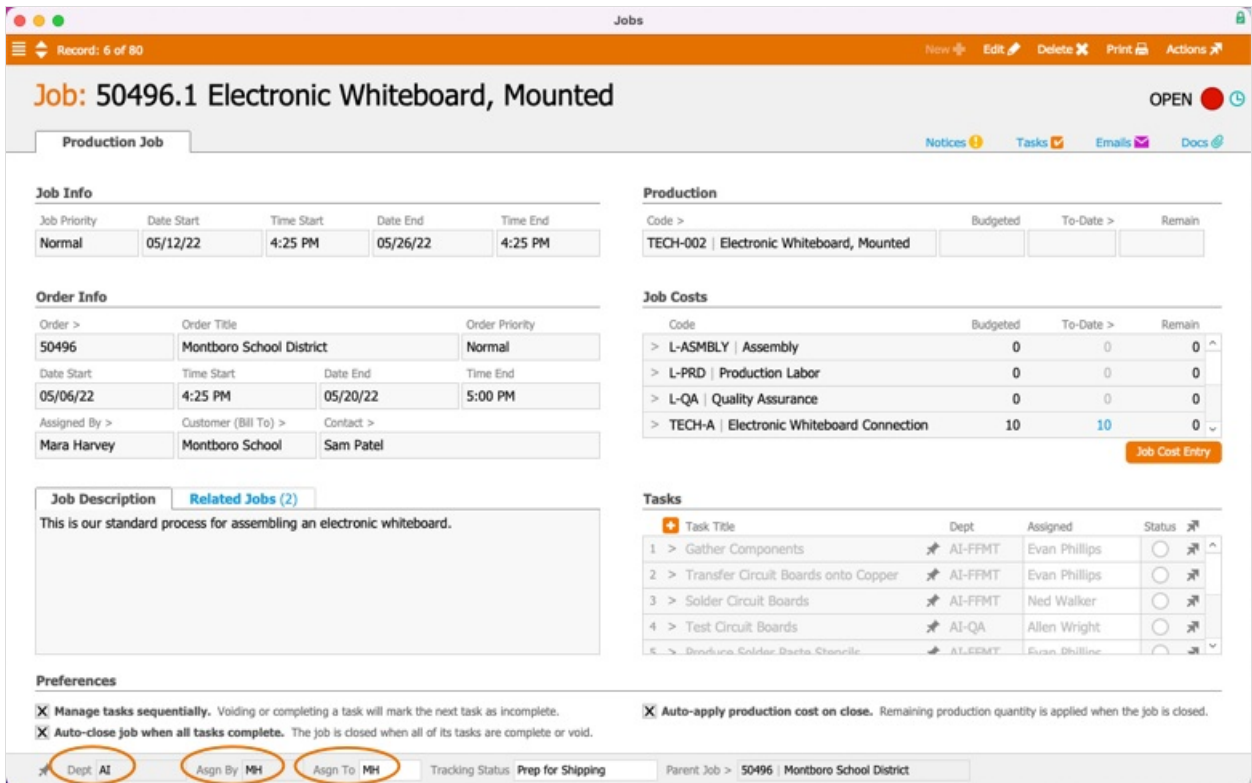


Understanding Job Assignment Logic

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This guide explains how job assignments function. It is intended for general users.

When you open an order, the system automatically creates the needed Job records and fills in the assignment fields at the bottom of the Job record:



Cascading Job Assignment Rules

For job assignment fields (i.e. Department, Assigned By, and Assigned To), aACE assumes that a specific individual will be responsible for completing or coordinating each task. It identifies the team member most likely to be responsible for each job. If the assignment needs to be transferred to someone else, these assignment fields are all editable drop-down lists that list users with the appropriate privileges.

When a job is created, the following rules determine the source records for automatically setting the default assignment. aACE pulls information from the first available source. If no information is available there, the system checks the next source.

Department Assignment

1. From the related line item code (LIC)

Note: Department assignments for an LIC will be inherited by the jobs generated from that LIC and the tasks generated from those jobs.

2. From the parent job
3. From the related order

Assigned By Team Member

1. From the parent job
2. From the related order

Assigned To Team Member

The system assigns different job types using different sources:

1. Order Jobs: From the related order
2. Standard Jobs: From the related order
3. Production Jobs:
 1. The traffic manager of the related LIC's Department
 2. The traffic manager of the related office's Fulfillment Department
 3. From the parent job
 4. From the related order

Workgroup Assignments

Some organizations collect jobs for members of a group (e.g. a department) to work on as they are able. You can easily customize aACE to establish this type of 'work center' assignment.

1. Create a placeholder "team member" (e.g. First Name "Engineering," Last Name "Department").
2. Assign that placeholder as the traffic manager for those jobs.

This helps prevent users from taking assignments that someone else has already started on.
3. Set the proper preferences for each member of the group to view and edit tasks that are assigned to the placeholder.

Other group members can then manually transfer assignments to themselves.