# 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:

Job: 5049 Production Job		onic V	Vhitebo	ard, Mounted			Notices 🔒	Tas	ks 🗹 Emaile	OPE	N C
Job Info					Production	n					
Job Priority Da	te Start Tir	me Start	Date End	Time End	Code >		B	dgeted	To-Date >	Rem	ain
Normal 05	/12/22 4:	25 PM	05/26/22	4:25 PM	TECH-002	Electronic Whiteboard, Mounted					
Order Info					Job Costs						
Order > 50496	Order Title Montboro School District			Order Priority	Code  Code L-ASMBLY   Assembly			dgeted 0	To-Date >	Rem	
Date Start	Time Start	District	Feed	Time End	L-PRD   Production Labor			0	0		0
05/06/22	4:25 PM	05/2		5:00 PM	> L-QA   Quality Assurance			0	-		0
Assigned By >		Customer (Bill To) > Contact		5.00 PPT				10	10		
Mara Harvey	Montboro School Sam Patel				- IECH-	Electronic whiteboard connect	ion i	10	10	Job Cost	
Job Description	Related Jobs				Tasks						
This is our standard process for assembling an electronic whiteboard.					🔁 Task	Title	Dept	A	ssigned	Status	P <sub>R</sub>
						er Components	🖈 AI-FF		van Phillips		* ^
						sfer Circuit Boards onto Copper	🖈 AI-FF		van Phillips		PK.
					3 > Sold	er Circuit Boards	🖈 AI-FF		led Walker		P <sub>R</sub>
						Circuit Boards	* AI-QA		llen Wright		Fr.
					5 > Drod	una Saldar Daeta Stancile	AT.EE	MT F	ivan Dhilline	0	31
	uentially. Voiding or co			ext task as incomplete. s tasks are complete or void.	X Auto-app	ly production cost on close. Remai	ning productio	n quantity	is applied when the	he job is cl	osed.

## **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**

- 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").
- 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.