



# Assignment and Approval Engines

*Simplify Advanced Routing*

## ASSIGNMENT ENGINE

The **Assignment Engine** was created to simplify advanced routing rules for SDE. The Assignment Engine is simple to set up, and even the most novice SDE user can create intelligent routing rules. The Assignment Engine works for Incidents, Work Orders, Problems, and Changes.

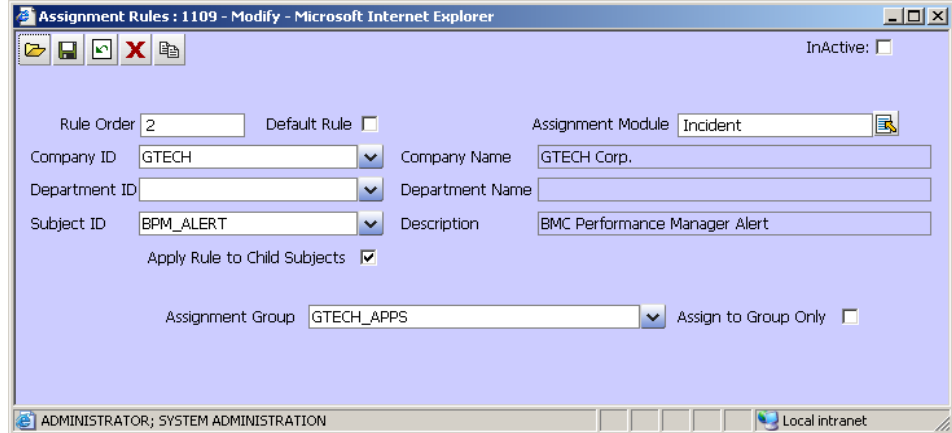
The Assignment Engine uses assignment rules to route requests to the correct groups. These rules are stored in a module like all other SDE data records, making it easy to create reports that display how requests are routed. The Assignment Engine uses the company, department, and category of the record to find the correct assignment group. Once the correct group is found, the Assignment Engine will find all available staff in that group based on availability and work schedule. The Assignment Engine will assign records to a support staff in a round robin fashion.

This adds ownership to requests put in by users by automatically routing to an available staff member instead of the request first being assigned to a group. This will also speed up the process of resolving issues.

Assignment rules are designed to be very flexible. You can specify a default group to which the request will be assigned if

the record does not match any of the rules in the Assignment Engine. This “catch-all” rule ensures that customer requests do not fall through the cracks. Another flexible feature of the Assignment Engine is the ability to specify to which module the rule applies—Incidents, Work Orders, Problems, Changes, or all modules. This allows you to build separate assignment rules for each module.

The Assignment Engine was built to integrate with Self Service so that when a user submits a request, it will be routed to the correct staff member immediately. It was also designed to be used with templated work flow in SDE (e.g. new hire, terminated employee, transferred employee) so you can easily speed up these processes by routing directly to an available staff member to complete the assigned work.



## KEY FEATURES

- Brings advanced workflow functionality to SDE
- Coordinates disparate support groups while maintaining a SPOC (Single Point of Contact)
- Application resides completely inside of SDE, which ensures upgrade-ability
- Minimizes number of Business Rules to be maintained
- Easy reporting
- Staff assignments based on Availability and Work Schedules
- Integrates with Self Service and work flow
- Does not require system administrator rights to create or change rules



## APPROVAL ENGINE

The **Approval Engine** maintains the same user-friendly and intelligent mentality of the Assignment Engine, but uses it to automate the change assessment and approval process. The Assignment and Approval Engines are designed to be used together to automate business processes efficiently and effectively, but each can be implemented on its own.

The setup for the approval rules mirrors that of the assignment rules. The rules match company, department, and category to the record submitted to the Approval Engine. After you create your approval rule, you can add approvals and assessments in the actions tab. These are the approvals and assessments that will be created when a record is submitted to the Approval Engine that matches the approval rule.

When a change is created, the Approval Engine will create the assessments and approvals in the first stage of the approval rule. Once all approvals and assessments have been completed in stage one, the Approval Engine will create all

the assessments and approvals for stage two. This way you can easily create as many assessments and approvals in a stage as required. The application is also designed to allow you the freedom of using as many or as few stages as are needed, making the Approval Engine very scalable. The Approval Engine also utilizes the “route to” option in the staff availability form so that if an approver or assessor is unavailable, the staff member selected in the “route to” field will be assigned the assessment or approval.

Order	Action Type	Staff ID
1	Change Approval	O_SALES1
1	Change Assessment	M_NETOPS1
1	Change Approval	O_SALES2
1	Change Assessment	M_NETOPS2
2	Change Assessment	E_APPS1
2	Change Approval	D_SUPPORT1
2	Change Approval	D_SUPPORT2
2	Change Assessment	E_APPS1
2	Change Assessment	E_APPS2

## RIGHTSTAR SYSTEMS

### Headquarters in Vienna, Virginia

RightStar Systems is a leading provider of ITIL-based service management solutions for upper-middle market firms and government agencies. As an Elite BMC Software Solution Partner, RightStar provides consulting, design, and implementation services for BMC Service Desk Express and BMC Remedy ITSM products. Additionally, RightStar has developed its own add-on modules, MagicWand and MagicMobile, to enhance the functionality of BMC Service Desk Express. RightStar also conducts onsite ITIL assessments and provides strategic recommendations for delivering services to the business more efficiently.