

Assigning work to the right person

A key aspect of workflow management in Plint is ensuring that the minimal amount of time is spent assigning work to the right person or vendor. To this end, there is an array of options called "Job assignment criteria", all based on the concept "match user data with job data". In short, [users are categorised with different data](#), which can be matched against data from the job, or the whole project.

A simple example might be: For all subtitling jobs in Project A, automatically select users who have the same **target language** as well as the **job type** "Subtitling".

A more refined example might include the requirement that the users also have the same genre **keyword** as the *project* and perhaps a special **tag**.

These criteria, like all job options, can be configured for individual jobs, batch edited for multiple jobs and pre-set for the jobs that are created using joblist templates.

Available criteria

- Target language
- Source language
- Job type
 - Note: The three criteria above can also be combined into [Skill sets](#).
- Keywords
- Tags
- Priority (a simple 1-5 ordering list)

Prioritising matching users

If multiple matching users are found, the **Priority** setting on user level will automatically come into play, selecting the user with the lowest value first. **Tags** can also be used to prioritise users. These settings create a "soft" filter that determines who is selected *first*, but without excluding others completely. Others will still be *available* when criteria are applied (see below).

Avoiding incorrect assignment with Conflicting job types

[New: Nov 2024]

In order to avoid a situation where the same user is assigned, for example, both Subtitling and Proofing on the same file, you can use the Conflicting jobs feature.

- First, go to Tools & Data / Job types to configure which job types are "in conflict".
 - For example "Subtitling from template" could be set to conflict with "Full QC", depending on which job types are in your system.
- With Job tank:
 - When a user tries to self-assign a job in the Job tank, the system will check if they have a conflicting job in the **same node** (e.g. same part and target language). In this case, the user will be notified with an alert and the job will not be assigned to them.
- With "Find random matching user":
 - If a job is set to be offered to a "random matching user" on decline (or failure to confirm), the rule will also be applied. A user with a conflicting job will automatically be excluded.

Applying the criteria in practice

There are several ways these criteria are applied. The most obvious way is that the dropdown "Assigned to" is filtered in real time as criteria are added or removed from a single job in edit mode (see picture below). The list here always reflects which users match all the requirements.

The criteria will determine which jobs are shown to a user in the [Shark tank](#) (if this function is enabled), and which ones will be notified about available jobs.

If a job has the "User can reassign" option, the criteria will decide who the job can be reassigned to by the current user.

When a [joblist template](#) is applied, the settings for the created jobs can automatically be used to pre-assign users. The used criteria will also be stored along with the job, for future reference and use.

The great exception: client company excludes users from work for other clients

There is one major factor that will trump all criteria: if a user is linked to a **client company**, they will not be available for jobs on project for other companies. Linking a user to a Client company should, in short, only be used where suitable: typically when a major client wants to ensure that an in-house resource of theirs is assigned certain jobs in workflows on projects for them.

Overriding criteria

Anyone with editing access to jobs (such as a project manager fine-tuning a project) can always assign basically anyone, by simply searching on user name in the "Name search" dropdown. This will automatically ignore all other rules, even the "Client company" rule.

The assignment rules as shown when editing a single job. All criteria that are available for a specific job can also be set in a joblist templates, ensuring that all jobs in a certain workflow follow

the same rules.

Assigned to

Example LSP Inc (Currently Assigned) ▾

Name search (overrides all criteria)

Name search (overrides all criteria)

Shark Tank

No ▴ ▾

User can reassign

No ▴ ▾

Assign Criteria

Apply criteria ▴ ▾

Criteria

Job type ×

Target language ×

Source language ×

Prioritise users with tag

Tier 1 ×

Priority