

Auto Assignment : Round Robin based on Active Agents

Active agent based Round-Robin is an auto-assignment algorithm that aims to maximize agent engagement. The goal of this auto-assignment is very simple - assign tickets to each active agent in a round-robin manner. Once the number of tickets assigned to an agent (for a particular category) reaches the upper-limit specified, the agent will no longer be assigned more tickets. This kind of assignment ensures that when there is a continuous inflow of tickets, it is distributed among all active agents.

The upper limit for Auto-Assignment:

As mentioned above, this assignment allows the administrator to specify an upper-limit that is applicable for all agent at the auto-assignment level. All participating agent will adhere to this upper-limit. However, do note that this upper-limit is inclusive of tickets that an agent can potentially be assigned - meaning it includes tickets assigned manually and via assignment rules. Once an agent reaches the upper limit, auto-assignment ceases to assign any further tickets to him. However, he/she can still be manually assigned tickets.

How does it work?

Active agent based Round-Robin ensures that as long as there is an available agent who can be assigned tickets, ticket inflow is distributed in a round-robin manner amongst them. When an agent reaches the upper limit specified, he/she is removed from this round-robin queue. Then, the auto-assignment continues to assign tickets amongst the remaining agent.

An agent will be added to the assignment queue if any of the following happens

- A new agent makes himself available by setting his state to “Active” assuming his total pending ticket count is less than upper-limit set
- An active agent removed from assignment queue resolves tickets that brings his total pending ticket count (for associated category) below the specified upper limit

Configuring Round Robin based on Active-agent

1. Navigate to Manage>Categories
2. Click on “Add New Auto-Assignment”
3. Choose “Round Robin based on Active agent” from the type-dropdown as shown below. Click on Save Settings.

4. In the Category Auto-Assignment settings, choose the agent who would be participating in the auto-assignment.

Auto Assignment settings
Choose the staff members who should be a part of the Auto Assignment for this category

Name
Freighter Support Assignment Rule

Category
Freighter Support

Active
Yes

Type
✓ Round Robin based on Active Staff
Round Robin
Auto-Assignment based on Active staff

Save Settings Reset Cancel

5. Now, choose the upper-limit for this assignment. This upper limit is specific to this assignment rule (and by extension to this category) and applies to each of the associated agents. When the number of pending tickets assigned to an agent reaches this upper-limit, he will no longer be considered for auto-assignment. However, do note that he can still be manually assigned tickets.
6. Choose exclusion statuses (if applicable). Tickets that fall into these statuses will not be considered while validating if an agent has reached the specified

upper limit.

Category-Auto Assignment settings [Delete](#)

Choose the staff members who should be a part of the Auto Assignment for this category

Name

Category

Active

Type

Associate Staff

All All Administrators All Staffs

Kevin Mathew John Williams

Throttle limit

Choose an upper limit for tickets that can be assigned via this auto assignment. This value will be applicable for all associated staff.

Set throttle limit

Exclude statuses for load calculation

Auto assignment considers staff's current pending tickets load before assigning new tickets. Exclude the statuses which you don't want to consider while calculating the load.

NEW **OPEN** **ON HOLD**

Note

- The agent must set themselves to “Active” before they are eligible to participate in auto-assignment. This ensures that the agent is not assigned tickets when they are offline or when they are performing other tasks in the help-desk.
- When the agent decides to become “Inactive”, they have 2 options:
 - Release all pending tickets in their queue back to the system so that they are considered for auto-assignment
 - Hold on to the pending tickets assigned to them
- The upper-limit specified here is specific to the category for which the auto-assignment has been created. In other words, the same limit applies to all associated agent. While calculating an agent ticket assignment load (for this auto-assignment), only the tickets belonging to this particular category will be considered.