Create Allocation Plan in Cora OpsManager

Allocation plans in Cora OpsManager are actually the business rules that define the allocation of a case based on some pre-defined criteria.

To create an allocation plan (team allocations):

1. On Admin console, go to **Solutions** > **Ops Manager**.

2. Under HotOperations Common Tasks section, click **Manage Plan**.

3. Smart Allocation Plan window appears.

4. Click **Add rule** to add new rule, or click edit icon against a rule to edit.

5. Add or update rule as per need.

6. Click **OK**.

You can use ICM Main Process Data Model tables' data with any variable in the main case process, to define rule conditions.

Most of the allocation plans in Cora OpsManager are usually based on Inbox, Category, or Type.

As a best practice, use the following rules:

Based on Category

Set the following in allocation plan:

- Allocation rule:

```
wf.Variables["ICMGCaseCategory"] == "X"
```

- Allocate to: the desired team.

Based on Inbox:

Set the group for each inbox, in mailbox routing config lookup.

Set the following in allocation plan:

- Allocation rule:

```
!String.isNullOrEmpty({DataModel}.Query("ref:nsSharedData/CaseDetails").Select(AllocatedGrou
pPath).FirstOrDefault())
```

- Allocate to:

```
ToInt32({SQL: SELECT fldid FROM tblOrganization WHERE fldPath =
{{DataModel}.Query("ref:nsSharedData/CaseDetails").Select(AllocatedGroupPath).FirstOrDefault
()}})
```