

Create a HotOperations Solution

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V8.7 and later

Overview

HotOperations solutions include additional elements that form the basis of a case management and work optimization application.

TIP

With your business analyst team, create a high-level model of the case in App Studio. Verify that the high-level model reflects the organization's goals for successfully resolving the case. It is recommended to fine-tune the model in discussions with stakeholders, such as operation managers, department heads, and management.

Solution elements

Element	Description
Resource management	A reference to a group in the organization structure. For this group, you can allocate the solution's cases and tasks.
Smart allocation plan	A set of rules for automatic work allocation. You can select the group to which to allocate the rule from a list, or set up an expression that returns a group or a number of groups. Using expressions can reduce the number or rules required for large organizations with multiple groups and complex workflows.
Case effort	Estimated number of working hours that it takes to complete a task. This number affects all dashboards and calculations.

Solution variables

When you add a master workflow to a HotOperations solution, automatically adds a set of variables that are necessary for the solution to run successfully. The variables are added to the workflow as local variables, unless they are already defined as global variables.

NOTE

You must check out the master workflow for the operation to succeed.

Do not delete these variables.

You can update their values as needed.

Variable	Alias	Type
<i>scmCaseEffort</i>	Case Effort	Integer
<i>scmCaseImportance</i>	Important	Boolean

Variable	Alias	Type
<i>scmCaseDueDate</i>	Due Date	DateTime
<i>scmCaseTitle</i>	Case Title	String

Allocation plan execution

Cases can be manually or automatically allocated to groups.

Automatic allocation

The Smart Allocation plan is executed when:

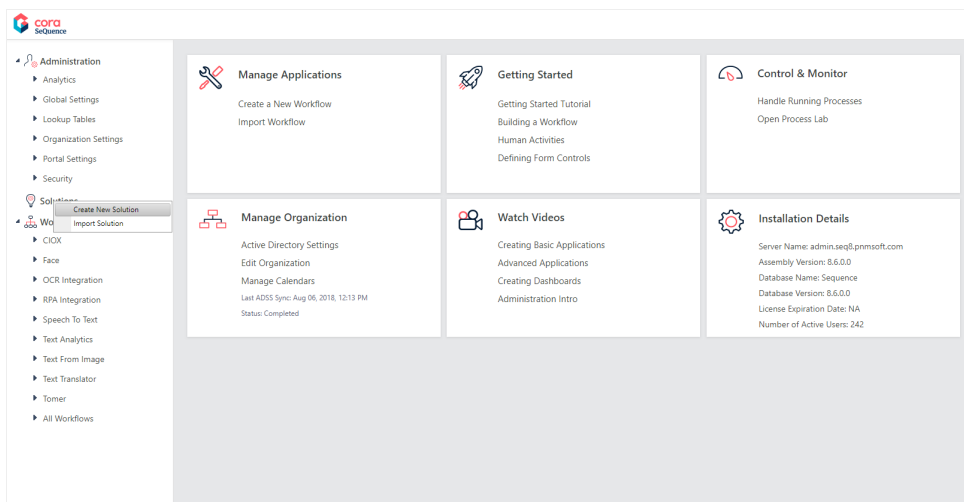
- The master workflow is created.
- A workflow variable included in the allocation plan changes during the execution of the master workflow.
- You reallocated a case using a Built-in Command activity.

Manual allocation

The Hot Operations Manager can manually allocate cases.

Create a solution

1. In the Administration site, right-click **Solutions**, and then select **Create New Solution**.



2. Select **HotOperations Solution**, type a name for the solution, and click **Create**.

Create New Solution ?
Create a new Solution and select its type

Choose solution type

Generic Solution	Name HotOperations Solution
HotOperations Solution	

Description
A solution that also includes HotOperations and advanced resource management

Solution Name
Enter the name of the new solution
Global Sales Solution

Open Configuration Wizard

Create **Cancel**

3. Create a new or select an existing master workflow, and then click **Next**.

Master Workflow Definition
Edit the Solution's Master Workflow

Master Workflow Creation Method

- Create New Master Workflow**
Create a new workflow and set it as the solution's Master Workflow
- Select Existing Workflow**
Select an existing workflow and set it as the solution's Master Workflow
- No thanks, I will define it later**

Master Workflow Name
Global Sales Solution

Back **Next** **Cancel**

4. Enter an estimation for the case effort, and click **Next**.

Case Effort
Edit the Solution's Case Effort

Case Effort
An estimation of how many working hours the case will take
17.5

Back **Next** **Cancel**

5. Select a root group for the solution, and then click **Next**.

Resource Assignment
Edit the Solution's Resources

Choose the root group as resource

- Entire Organization
 - Global Division

Chosen Root Group
Global Division

Back Next Cancel

6. (Optional) Create rules for case allocation.
 - a. To allocate the rule to a group, select the group from a list, or click **Use Expression** to set up an expression.
The expression should return a group ID or a collection of group IDs.
 - b. To ensure that your expressions are valid, in the Expression Wizard, click **Validate**.

IMPORTANT

When setting up the expression, use Int32 format or use the Convert function to convert your expression into Int32 format. When you **save** the allocation rule, the system checks if the expression returns Int32 values. If the expression is not in Int32 format, you will not be able to complete the allocation plan.

NOTE

If you do not set up an allocation plan, the tasks go to the unallocated tasks list, and the Operations Manager needs to manually allocate them.

7. To stop the allocation execution after the first successful allocation match, select **Stop plan execution when allocation successful**.

Smart Allocation Plan
Add rules that enable automatic allocation of cases within a HotOperations solution. You can base each rule on case data or metadata.

Stop plan execution when allocation is successful.

+ Add Rule

Allocation Rule

IF
1=1

THEN Allocate to new Int32[] ([ToInt32(Split((input For m).Query("InputForm")["selectedGroups"], ","), [0]), ToInt32(Split((input For m).Query("InputForm")["selectedGroups"], ","), [1]), ToInt32(Split((input For m).Query("InputForm")["selectedGroups"], ","), [2]))

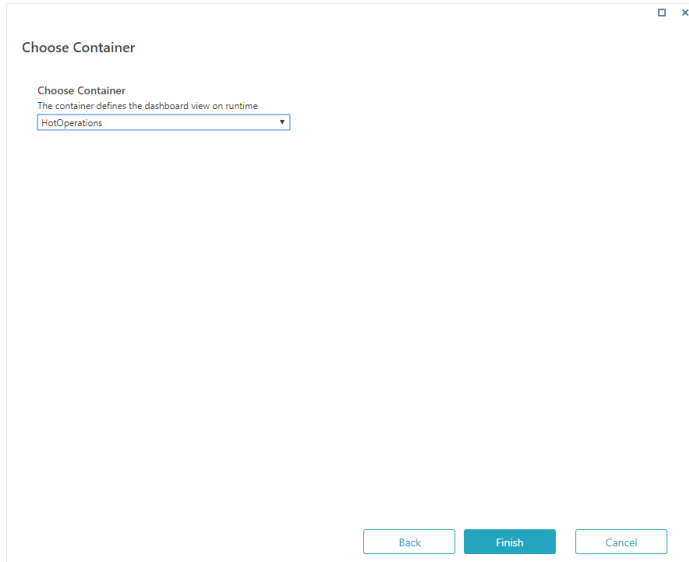
ELSE Allocate to Mgmt Group 1

OK Cancel

Tip:

The **Stop plan execution when allocation is successful** option improves system performance. Select this option when you set up complex allocation plans.

- 8. Select a solution container, and click **Finish**. Containers define solution dashboards.



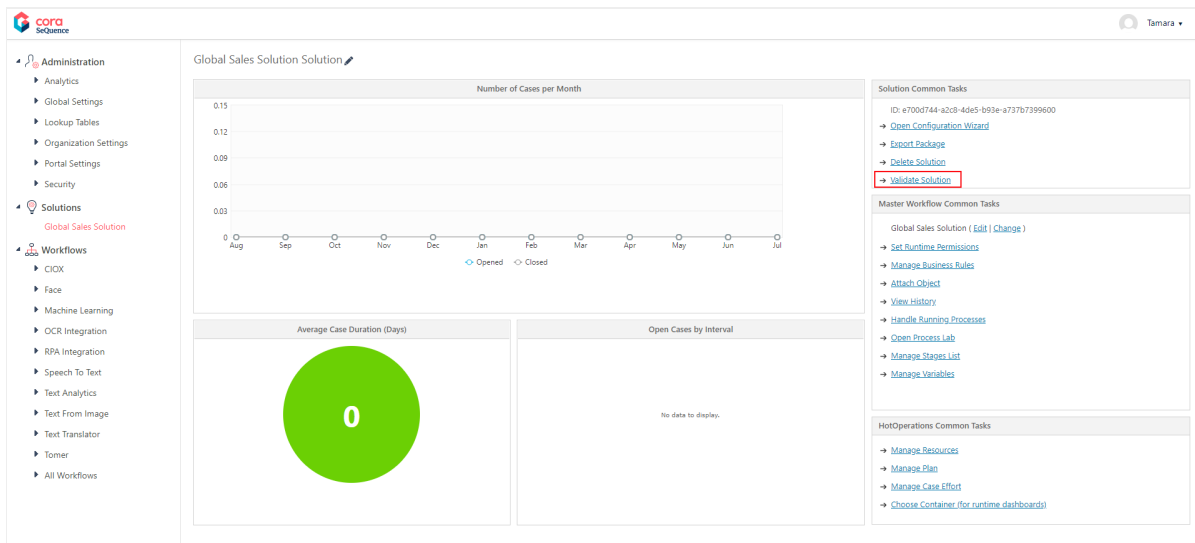
Result

The new solution is added to the **Solutions** list.

Validate your solution

You can validate the HotOperations solution to make sure that it does not include errors, warnings, or missing information. Validating a solution is not mandatory, but it is recommended as part of the implementation of the solution.

- 1. Under Solution Common Tasks, **Validate Solution**.



- o If there are issues, the system displays a list of the issues.

Source	Message	Severity
Allocation Plan/Allocation Rule	IF field is required.	Error
Allocation Plan/Allocation Rule	IF field: Expression is not valid.	Error
Allocation Plan/Allocation Rule	THEN field is required.	Error

- o If there are no issues, a success message appears.

Select a search provider

To enable case search for the solution, you need to map it with the respective search provider (available from version 9.2).

For more details, see the the *Select a search provider* section in [this article](#).

V8.6 and earlier

Overview

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Solution Elements

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Solution Variables

When you add a master workflow to a HotOperations solution, automatically adds a set of variables that are necessary for the solution to run successfully. The variables are added to the workflow as local variables, unless they are already defined as global variables.

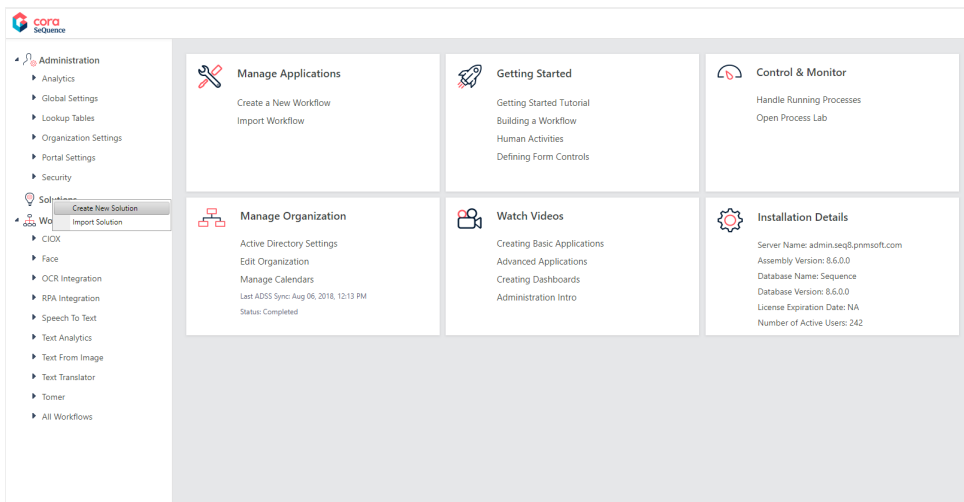
Note:

You must check out the master workflow for the operation to succeed.
Do not delete these variables.
You can update their values as needed.

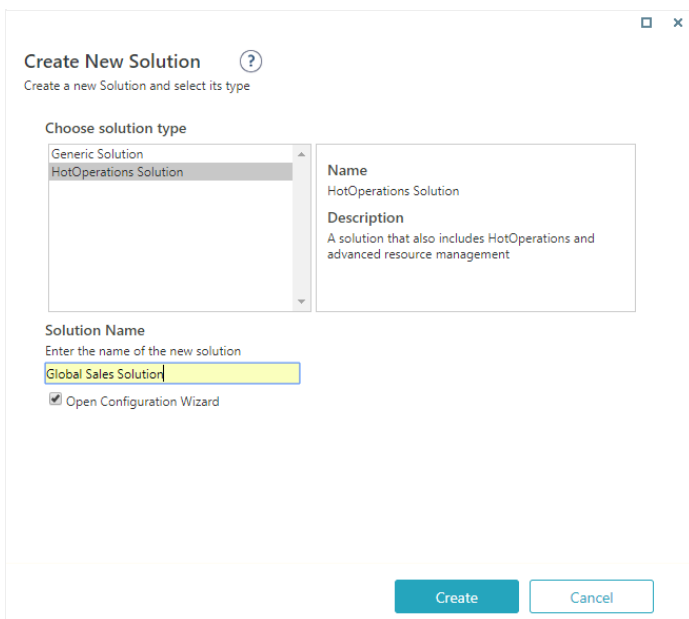
Variable	Alias	Type
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Solution Wizard

1. In the Administration site, right-click **Solutions**, and then select **Create New Solution**.



2. Select **HotOperations Solution**, type a name for the solution, and click **Create**.



3. Create a new or select an existing master workflow, and then click **Next**.

The screenshot shows a dialog box titled "Master Workflow Definition" with the subtitle "Edit the Solution's Master Workflow". Under "Master Workflow Creation Method", there are three radio button options: "Create New Master Workflow" (selected), "Select Existing Workflow", and "No thanks, I will define it later". Below this is a text field for "Master Workflow Name" containing "Global Sales Solution". At the bottom are "Back", "Next", and "Cancel" buttons.

4. Enter an estimation for the case effort, and click **Next**.

The screenshot shows a dialog box titled "Case Effort" with the subtitle "Edit the Solution's Case Effort". It contains a text field for "Case Effort" with the value "175" and the description "An estimation of how many working hours the case will take". At the bottom are "Back", "Next", and "Cancel" buttons.

5. Select a root group for the solution, and then click **Next**.

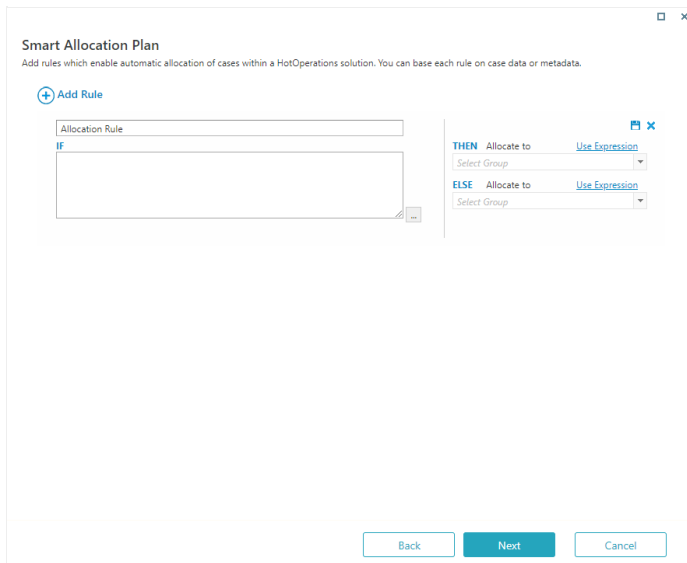
The screenshot shows a dialog box titled "Resource Assignment" with the subtitle "Edit the Solution's Resources". It features a tree view under "Choose the root group as resource" with "Entire Organization" and "Global Division" (selected). Below is a text field for "Chosen Root Group" containing "Global Division". At the bottom are "Back", "Next", and "Cancel" buttons.

6. (Optional) Create rules for case allocation.

To allocate the rule to a group, select the group from a list, or click **Use Expression** to set up an

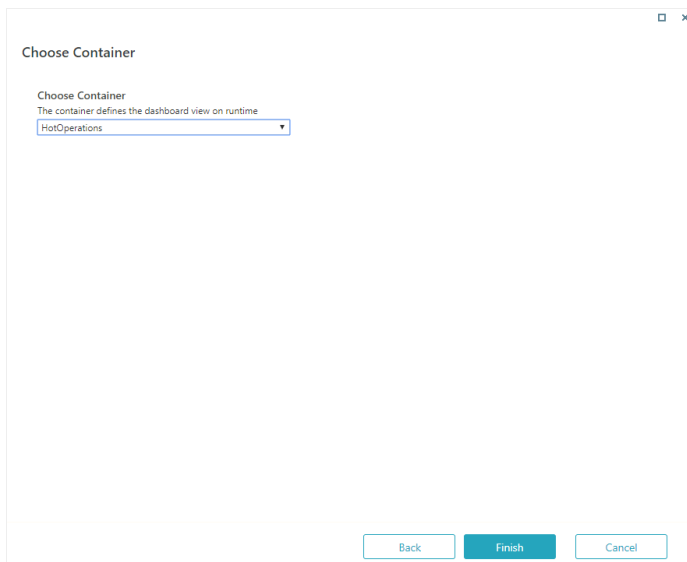
expression.

The expression should return a group ID or a collection of group IDs.



The image shows a dialog box titled "Smart Allocation Plan" with a subtitle "Add rules which enable automatic allocation of cases within a HotOperations solution. You can base each rule on case data or metadata." There is an "Add Rule" button with a plus icon. Below it is a form with an "Allocation Rule" label and a large text area. To the right, there are two conditional rule sections: "THEN" and "ELSE". Each section has "Allocate to" and "Use Expression" options, with a "Select Group" dropdown menu. At the bottom, there are "Back", "Next", and "Cancel" buttons.

7. Select a solution container, and click **Finish**. Containers define solution dashboards.



The image shows a dialog box titled "Choose Container" with a subtitle "Choose Container" and "The container defines the dashboard view on runtime". There is a dropdown menu with "HotOperations" selected. At the bottom, there are "Back", "Finish", and "Cancel" buttons.

Result

The new solution is added to the **Solutions** list.

What to do next

View the solution dashboard, common tasks, and master workflow tasks.