Create a HotOperations Solution

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
scmCaseEffort	Case Effort	Integer
scmCaseImportance	Important	Boolean

Variable	Alias	Type
scmCaseDueDate	Due Date	DateTime
scmCaseTitle	Case Title	String

Allocation plan execution

Cases can be manually or automatically allocated to groups.

Automatic allocation
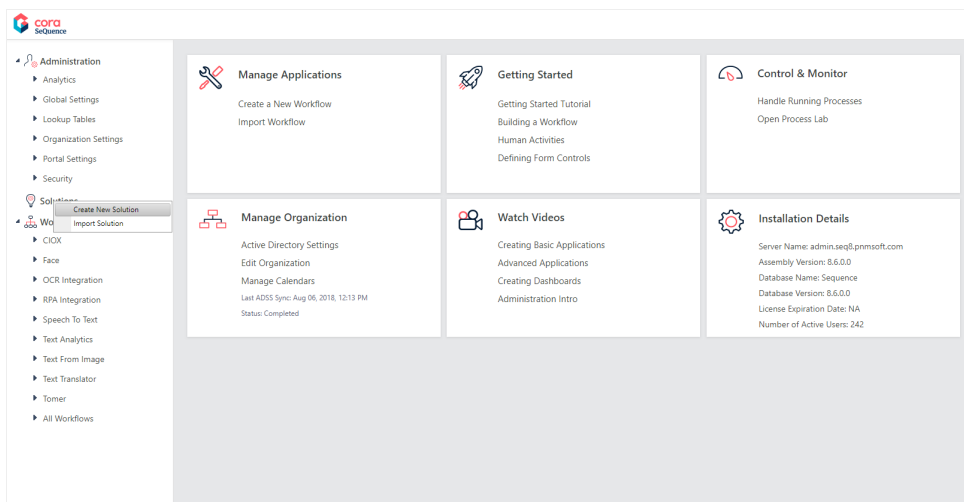
The Smart Allocation plan is executed when:

- 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**.

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

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

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

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.

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

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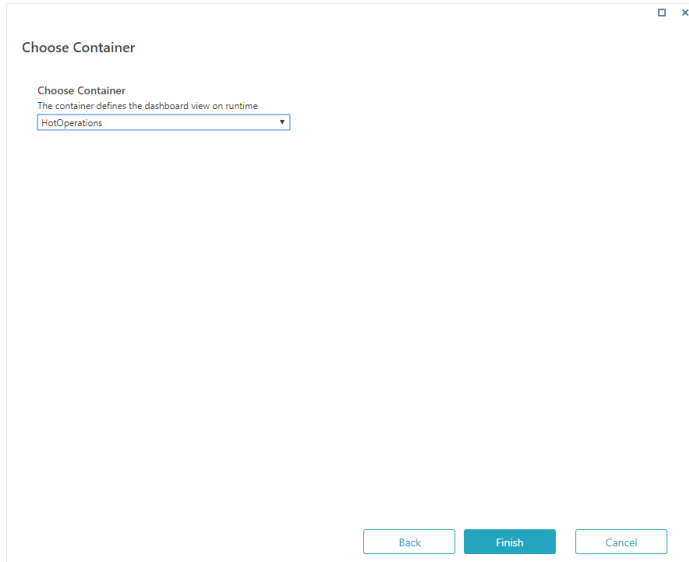
Result

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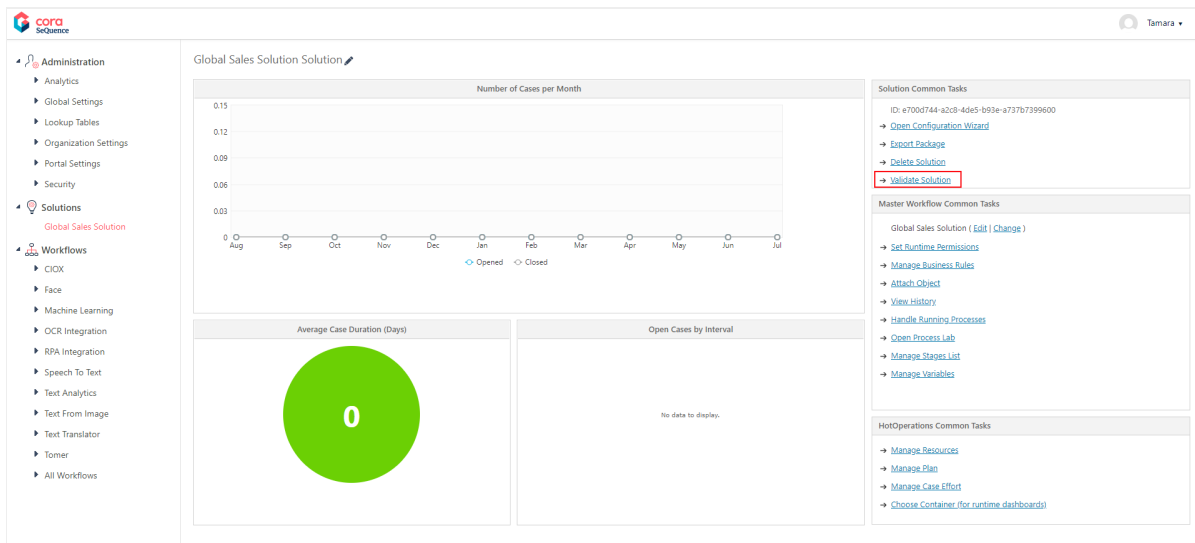
   o If there are issues, the system displays a list of the issues.

Customer Service Validation Results

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

- 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

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Solution Elements

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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.
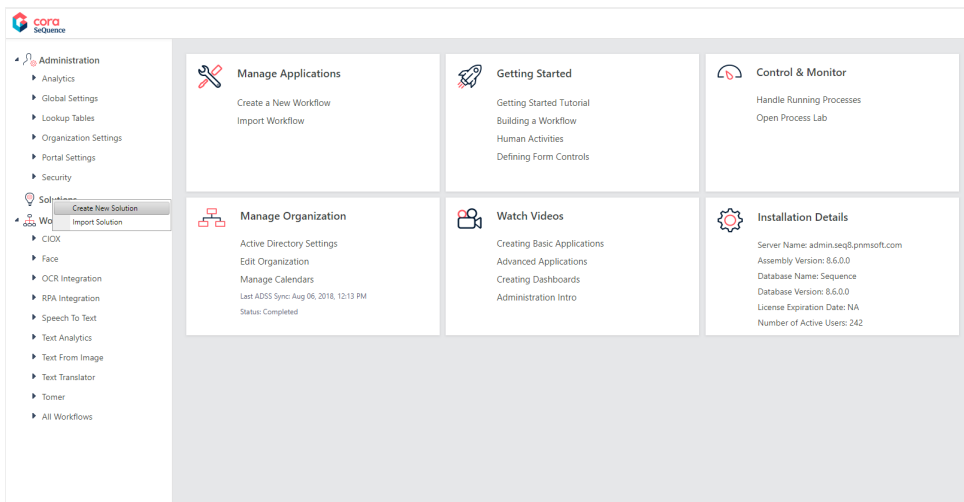
Variable	Alias	Type
scmCaseEffort	Case Effort	Integer
scmCaseImportance	Important	Boolean
scmCaseDueDate	Due Date	DateTime
scmCaseTitle	Case Title	String

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**.

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

175

| Back | Next | Cancel |

5. Select a root group for the solution, and then click **Next**.
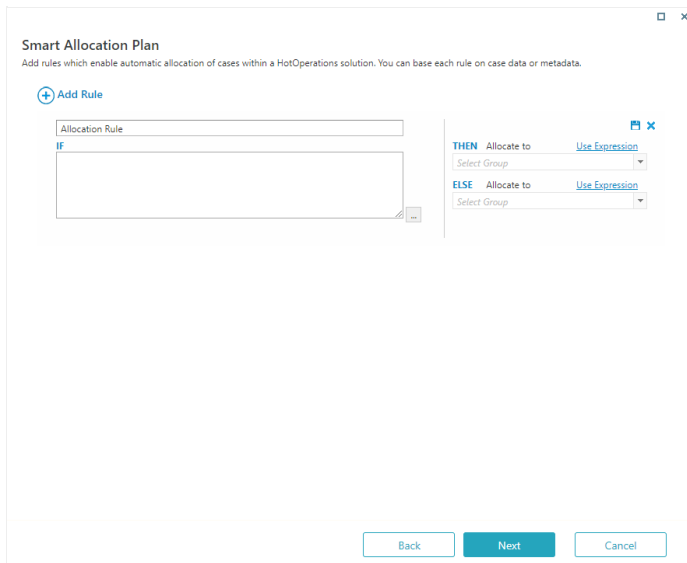
Resource Assignment
Edit the Solution's Resources

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.

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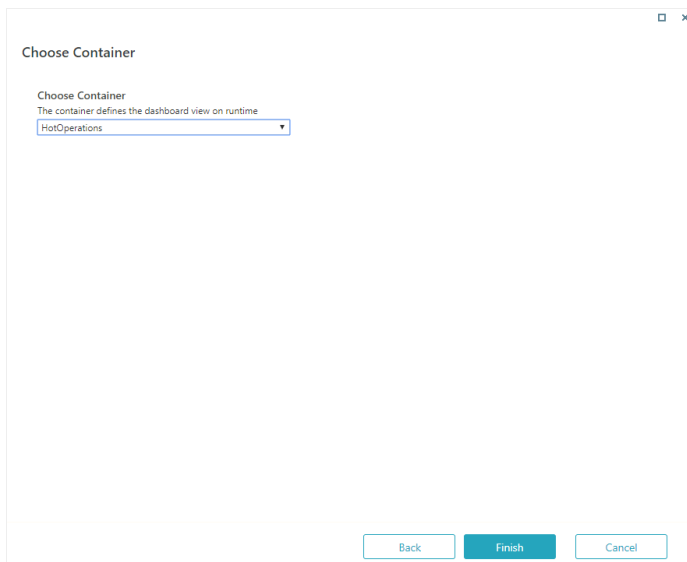
expression.

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

7. Select a solution container, and click **Finish**.

Containers define solution dashboards.

Result

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

What to do next

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