HotOperations Portal - Operations Manager

v8.4 and earlier

The Operations Manager uses the HotOperations portal to allocate work between teams. For the Operations Manager, the HotOperations portal includes several sub-pages.

Dashboard

The Dashboard page includes relevant charts and analytics for teams' work performance, and includes the following visuals.

Operations Manager Dashboard Page

Visual	Description
SLA Compliance	Number of cases that were completed on time, divided by the total number of cases. Displayed as a percentage.
Base and Actual Cost	Cost per case, based on the default operation setting (base), and the actual cost per case derived from the team utilization.
Team Utilization	How much effort is allocated to a team versus the team's monthly capacity. This is based on the value of the *scmCaseEffort* parameter.

Open Work	1. Number of cases by due date category, based on the value of the *scmCaseDueDate* parameter.
	    - Overdue
	    - Due today
	    - Due this week
	    - Due this month
	    - Other
	2. Number of allocated tasks versus unallocated tasks.

Work Closure Rate	Number of tasks closed every day from the beginning of the period, by category. - Average Closure: number of cases closed in this period divided by the number of days from the beginning of the period. - Closed Today: number of cases closed on that day. - Closed this week: number of cases closed in that week, inclusive.
Amount of Work Completed versus Overdue	For each day from the beginning of the time period, displays the number of cases that were closed on time versus tasks that were closed after the due date.

Visual	Description
Teams Leagues Table	Displays information for each team member. • Name • SLA • Workload • Closure Rate

Work Allocation Page

Operations managers use the Work Allocation board to allocate cases between teams in real-time. To allocate work, drag-and-drop cases from the Unallocated Work panel to the necessary Team queue, or from team to team. When you drag a case to a different queue, an Impact window appears, which details the allocation impact on business outcomes, such as Cost and SLA. With these tools, Operations Managers can make informed decision on how to allocate case work between teams and people, which reduces the cost of work and improves business outcomes.

Tip: We recommend that you manage less than 25 teams on the Work Allocation page. Managing more cases might affect performance. If you need to manage more teams, use the Cases List or Tasks List.

Operations Manager Work Allocation Page

Visual	Description
SLA Compliance	Number of cases that were completed on time, divided by the total number of cases. Displayed as a percentage.
Base Cost	Cost based on the number of hours it should take to complete all cases for the month.
Predictive Cost	The predicted cost per month if teams continue to work on the current workload.
Teams Workload	The percentage that each team is utilized for case work, out of their available monthly work hours.

Tasks List Page

Operations Managers use the Tasks List page to view a list of dynamic tasks for a solution, and to allocate one or more tasks in the operation.

Click the three dot button next to a task to view available actions.

You can sort the tasks list columns:

- Ascending: click the column once.
- Descending: click the column twice.

- Remove sort: click the column three times.

Cases List Page

Operations Managers can view a list of all cases and allocate those cases from the Cases List page. We recommend using the Cases List page when managing high volumes of cases.

v8.5

Overview

The Operations Manager uses the HotOperations portal to allocate work between the amalgamation of the sub-groups and teams for the group that they are defined as the HotOperations Manager for. You can define an Operations Manager for every group level, not just the root group.

Let's use a sample organization to understand. This organization has four main groups (Engineering, Human Resources, International Sales, and Marketing), each of which have sub-groups. For our example, we will use the International Sales group (root group). Below the root group are two sub-groups, International Region A and International Region B, each of which have two regional sub-groups (North-South, East-West).

International Sales HotOperations Manager

- International Sales A
  - Sales Group North
  - Sales Group South
- International Sales B
  - Sales Group East
  - Sales Group West

International Sales A HotOperations Manager

- Sales Group North
- Sales Group South

International Sales B HotOperations Manager

- Sales Group East
- Sales Group West

Important Notes

- Operations Managers and Team Leaders cannot exist on the same group level.
- There must be at least one sub-group beneath the group level where the operations manager is assigned.
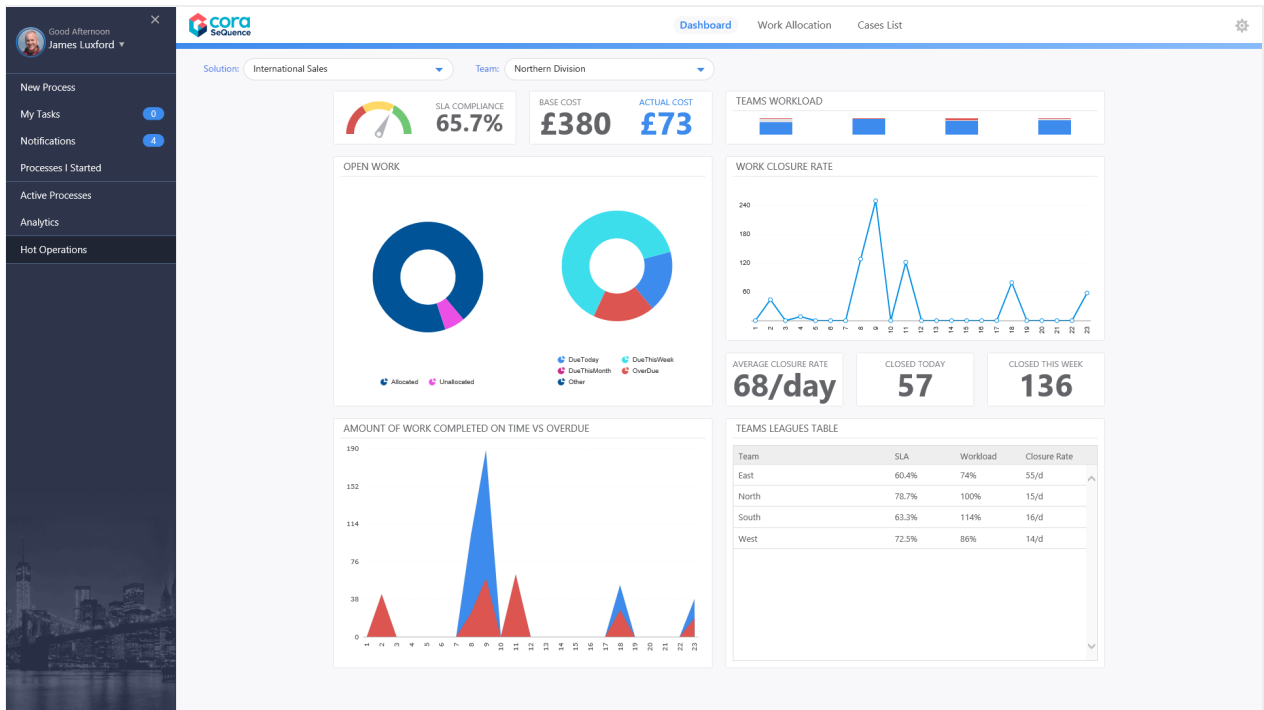
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Cora SeQuence   Dashboard   Work Allocation   **Cases List**   ⚙

Solution: [International Sales   ▾]   Team: [Northern Division   ▾]

Cases List: Open ▾   →X 🔽 ↺

☐ ▾	▾	⊽ Case Id	⊽ Due Date ^	⊽ Case Created	⊽ Last Updated	⊽ Team	⊽ Case Stage	⊽ Case Status	⊽ Case Title	⊽ Priority	⊽ Case Sub Type
☐	⋮	124815	22/01/2018	23/01/2018	23/01/2018		Action	Pending	General Query by Billy Kid	Low	General Query
☐	⋮	124818	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Joe Low	Low	Return Goods
☐	⋮	124820	22/01/2018	23/01/2018	23/01/2018	South	Action	Pending	Complaint by Simon Sayed	High	Complaint
☐	⋮	124824	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Helen Jones	Medium	Return Goods
☐	⋮	124825	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Amber Nectar	Low	Return Goods
☐	⋮	124827	22/01/2018	23/01/2018	23/01/2018	South	Action	Pending	Complaint by Jo B'sworth	Low	Complaint
☐	⋮	124832	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Abby Gate	Low	Return Goods
☐	⋮	124853	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Dave Davids	Low	Return Goods
☐	⋮	124860	22/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Gina Tonic	Low	Return Goods
☐	⋮	124814	23/01/2018	23/01/2018	23/01/2018		Action	Pending	General Query by Sue Sew	Medium	General Query
☐	⋮	124816	23/01/2018	23/01/2018	23/01/2018		Action	Pending	General Query by Steph Up	Medium	General Query
☐	⋮	124819	23/01/2018	23/01/2018	23/01/2018	North	Action	Pending	Product Support by Manny Monay	Low	Product Support
☐	⋮	124822	23/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Teresa Green	Low	Return Goods
☐	⋮	124826	23/01/2018	23/01/2018	23/01/2018	North	Action	Pending	Product Support by Will Iam	Medium	Product Support
☐	⋮	124829	23/01/2018	23/01/2018	23/01/2018	East	Action	Pending	Return Goods by Indiana Jones	Low	Return Goods

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