HotOperations Portal - Team Leader

Last Modified on 01/17/2019 4:17 am EST

V8.4 and earlier

The Team Leader uses the HotOperations portal to allocate tasks for their team. For the Team Leader, the HotOperations portal includes several sub-pages.

Dashboard

The Dashboard page includes relevant charts and analytics for the work performance of the Team Leader's team, and includes the following visuals.

Team Leader Dashboard Page

Visual	Description
SLA Compliance	Number of tasks that were completed on time, divided by the total number of tasks allocated to the team. Displayed as a percentage.
Cost	Cost per case. The cost of the team from the beginning of the time period divided by the total number of tasks allocated to the team.
Team Utilization	How much effort is allocated to an employee versus the employee's capacity for the period. By default, the employee capacity is eight hours a day.

Open Work	1. Number of tasks by due date category.
	  ◦ Overdue
	  ◦ Due today
	  ◦ Due this week
	  ◦ Due this month
	  ◦ Other
	2. Number of allocated assigned 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 tasks the team closed in this period divided by the number of days. • Closed Today: number of tasks the team closed on that day. • Closed this week: number of tasks the team 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 tasks that the team closed on time versus tasks that the team closed after the due date.

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

Work Assignment Page

Team Leaders use the Work Assignment board to assign tasks to teams and team members in real-time. The dashboard includes predictive analytics, which provide the Team Leader with details about the impact of assignment. To allocate work, drag-and-drop cases from the Unassigned Work panel to the necessary Team queue or Employee queue.

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

Team Leaders use the Tasks List page to view a list of dynamic tasks for a solution that is allocated to the team. If the Team Leader has multiple teams, the board displays the Team Leader's team first. The Team Leader can assign one or more tasks to team members by role or by member name. The Team Leader can also return work to the queue that team members already fetched.

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.
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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

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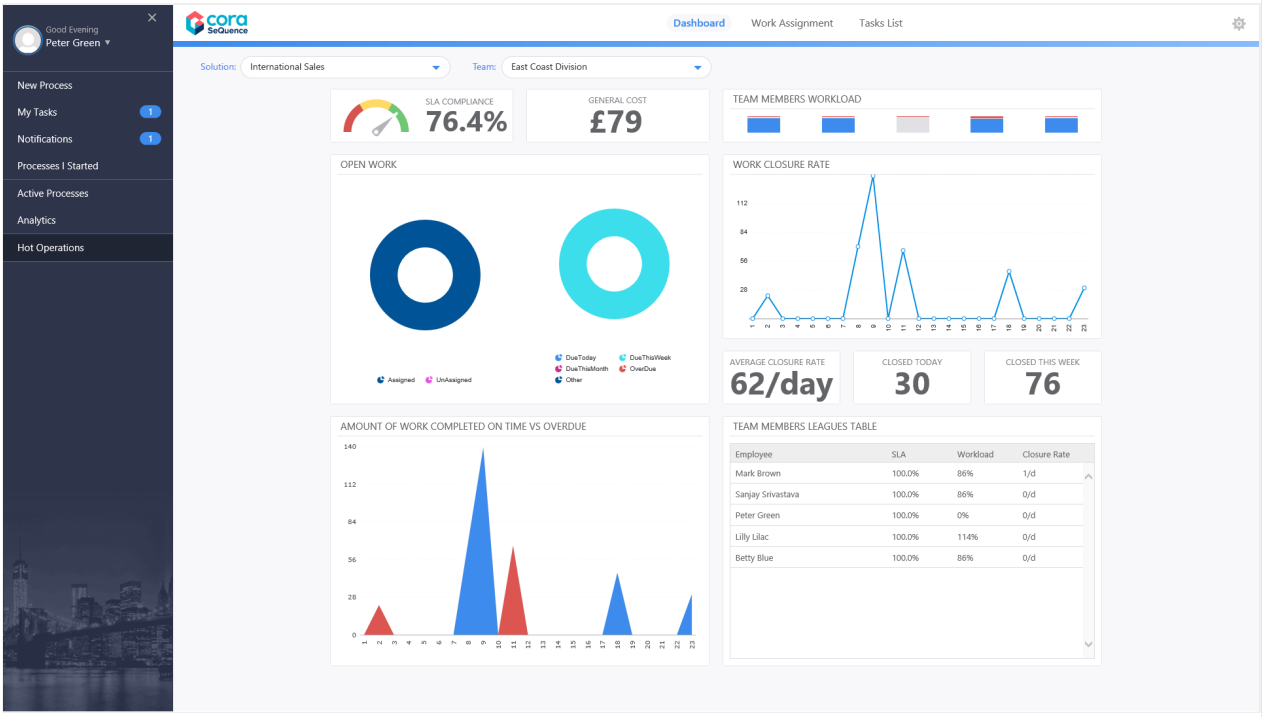

Work Assignment Page

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Team Leader Work Assignment Page

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General Cost	Cost based on the number of hours it should take to complete all cases for the month.
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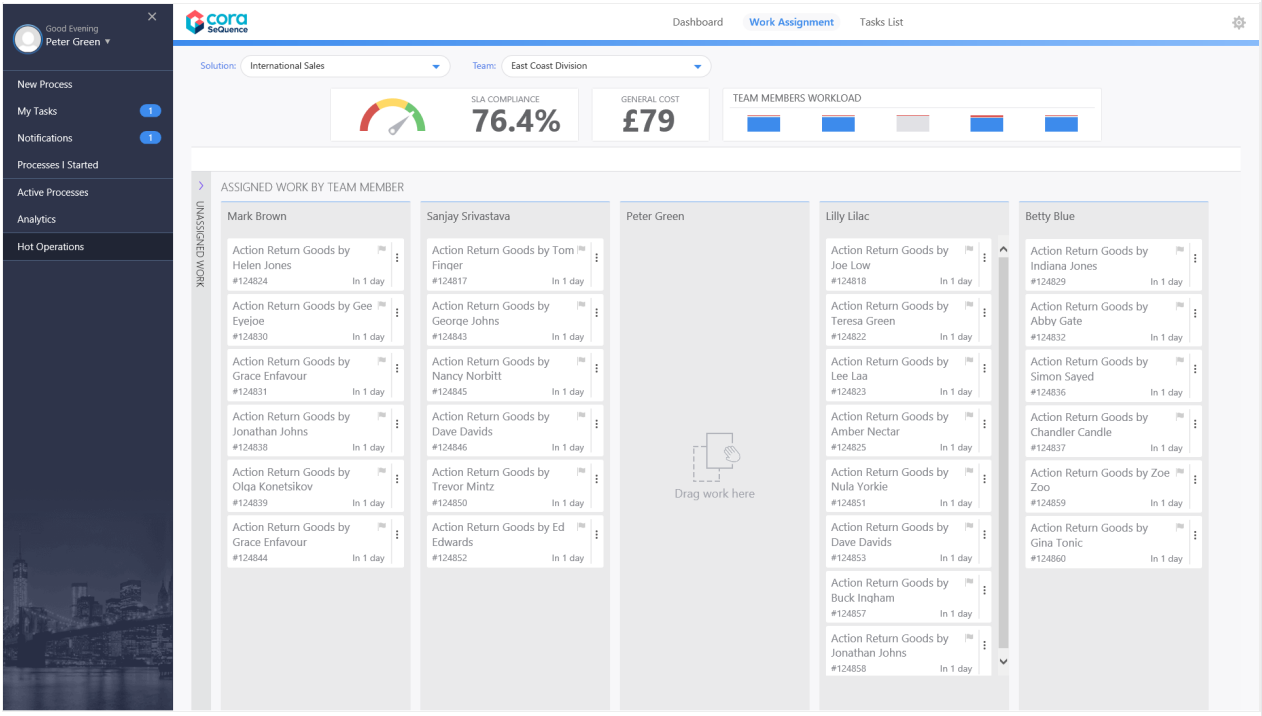
Visual	Description
Team Members Workload	The percentage that each team is utilized for case work, out of their available monthly work hours.



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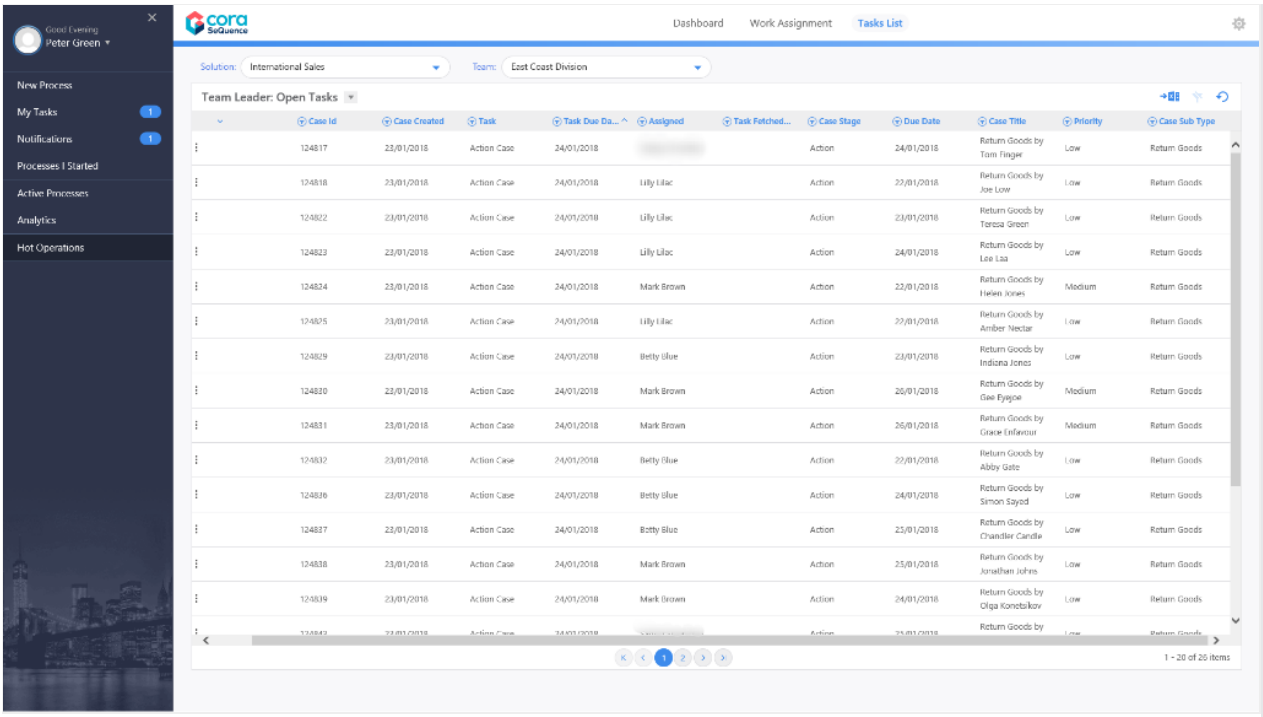

V8.6

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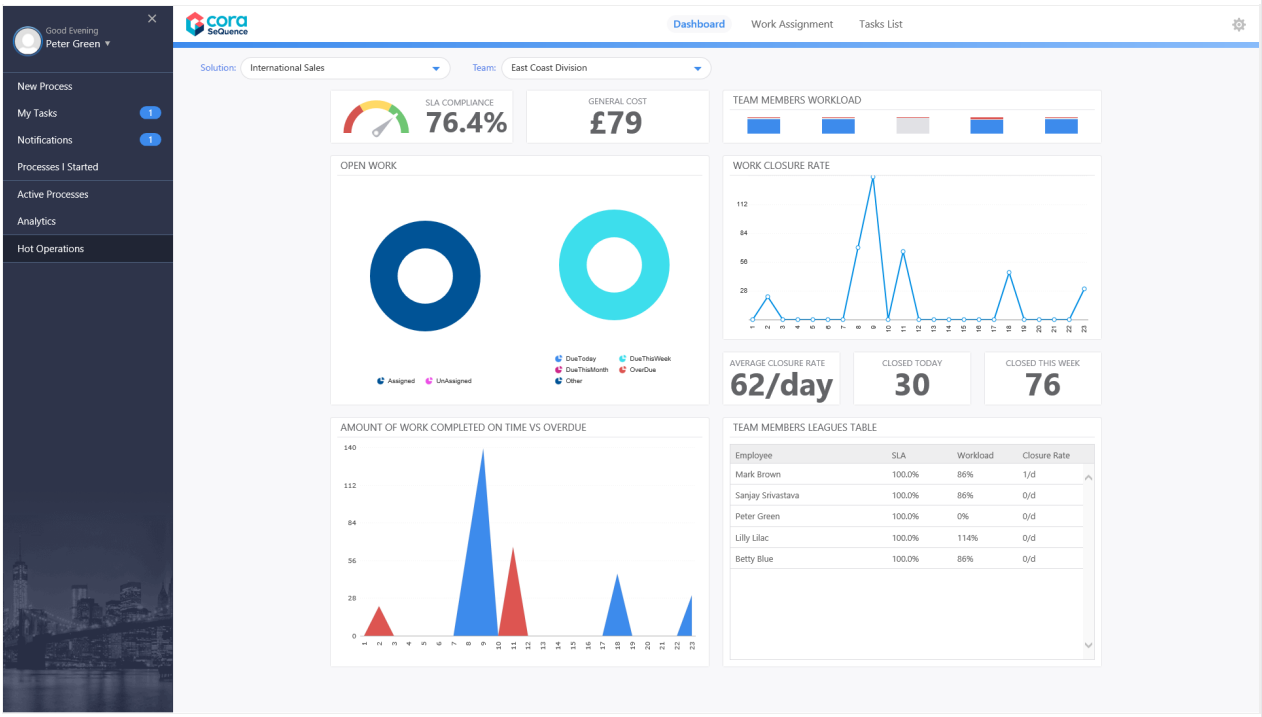

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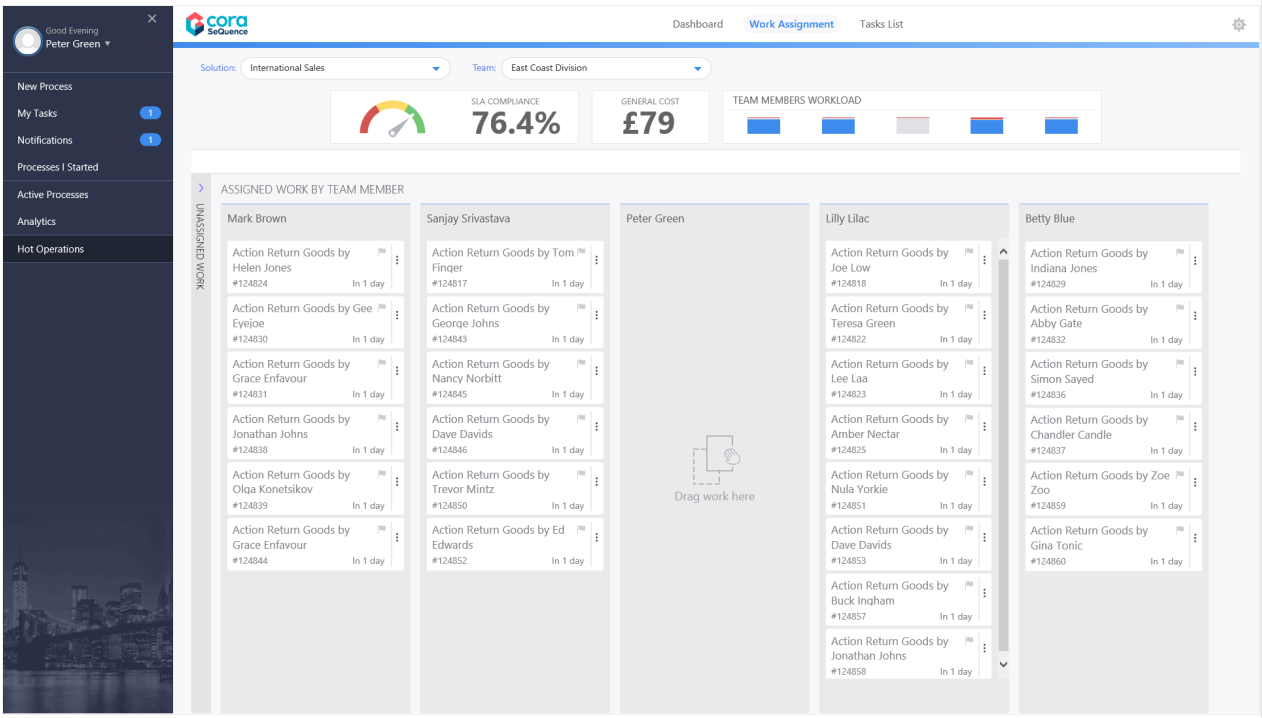

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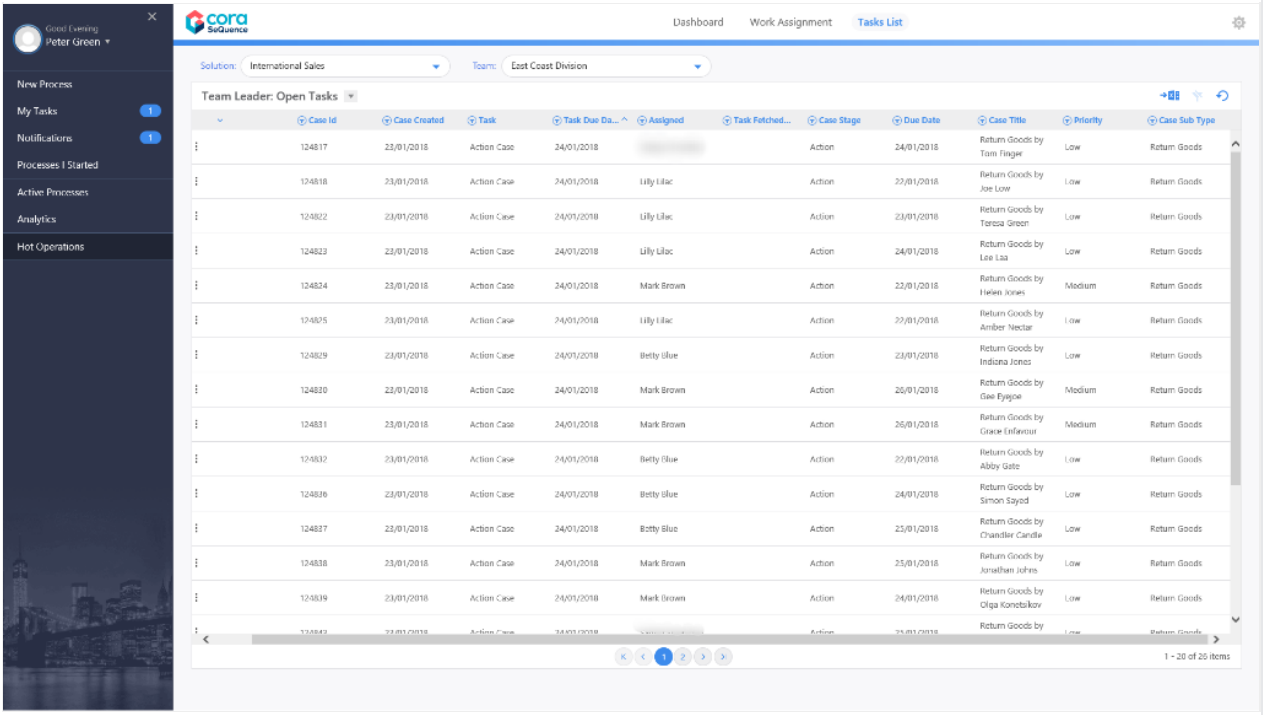

V8.7

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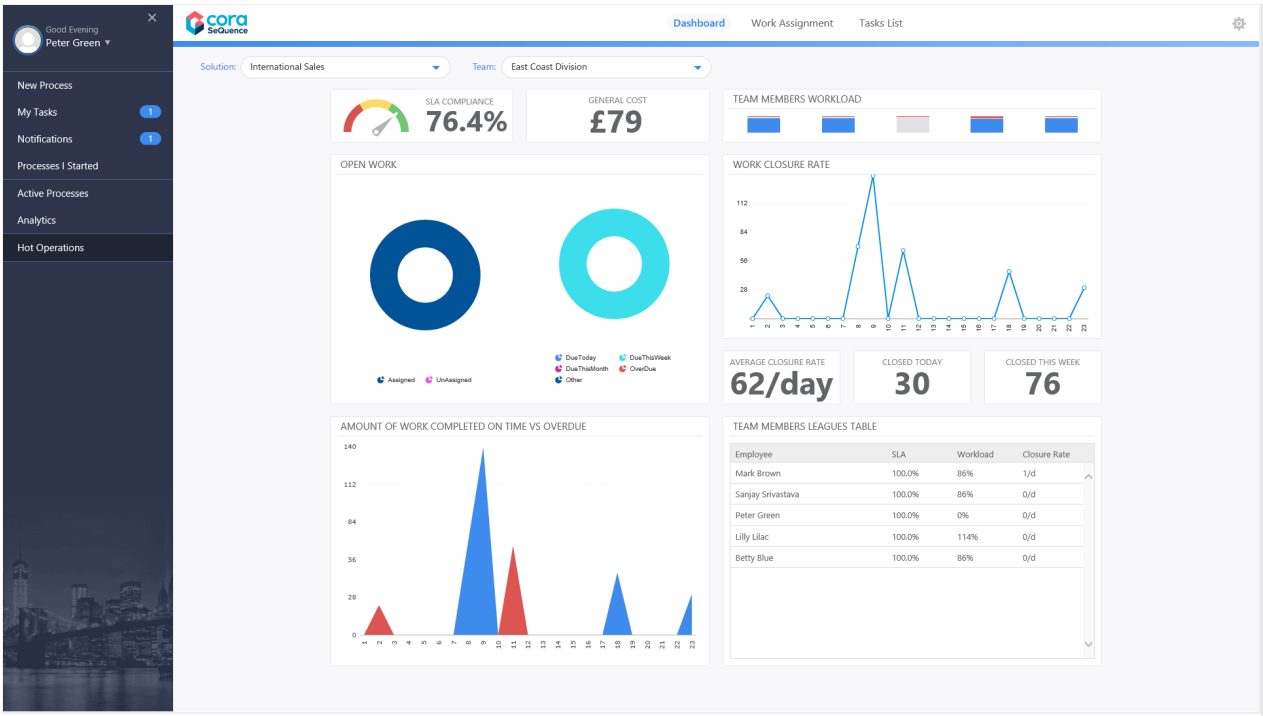

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In some organizations, the Team Leader can also set a case as important, or remove the importance flag from cases.

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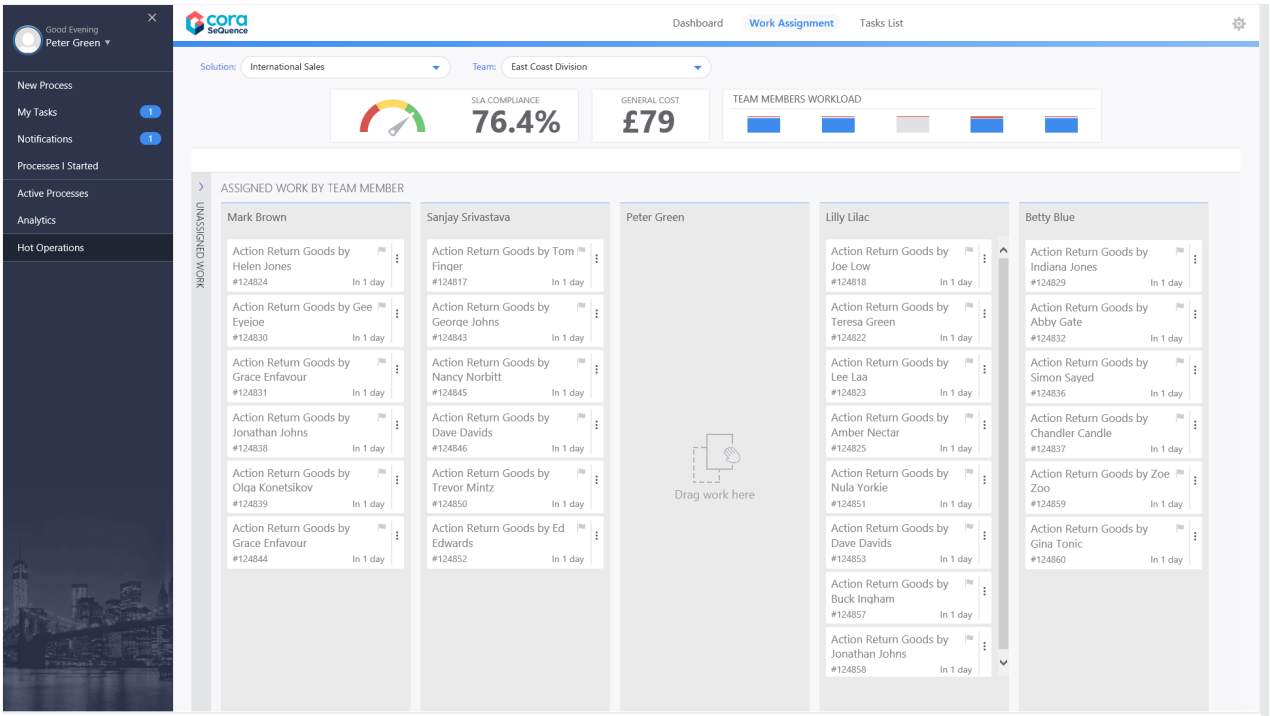

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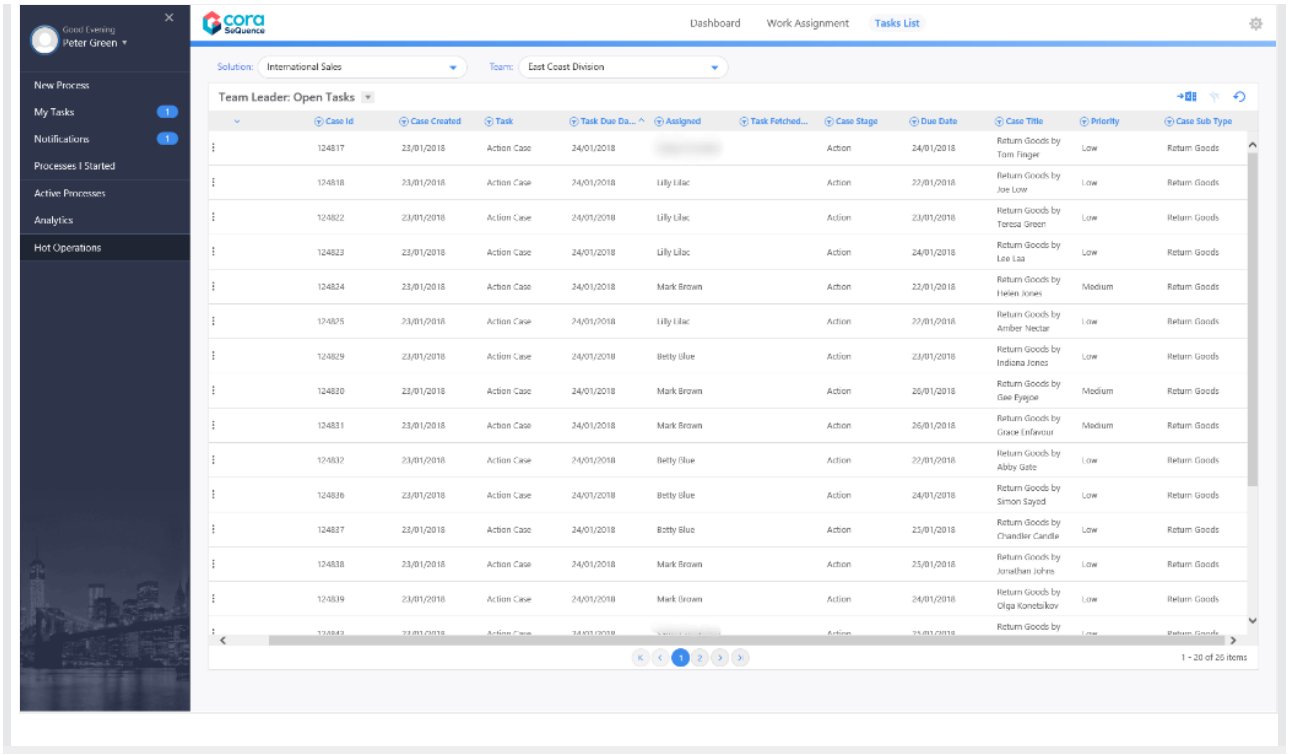
Good Evening
Peter Green
New Process
My Tasks 1
Notifications 1
Processes I Started
Active Processes
Analytics
Hot Operations
cora SeQuence
Dashboard
Work Assignment
Tasks List
Solution: International Sales
Team: East Coast Division
Team Leader: Open Tasks
Case Id
Case Created
Task
Task Due Da...
Assigned
Task Fetched...
Case Stage
Due Date
Case Title
Priority
Case Sub Type
1 - 20 of 26 items