

# 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
<b>SLA Compliance</b>	Number of tasks that were completed on time, divided by the total number of tasks allocated to the team. Displayed as a percentage.
<b>Cost</b>	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.
<b>Team Utilization</b>	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.
<b>Open Work</b>	<ol style="list-style-type: none"><li>Number of tasks by due date category.<ul style="list-style-type: none"><li>Overdue</li><li>Due today</li><li>Due this week</li><li>Due this month</li><li>Other</li></ul></li><li>Number of allocated assigned tasks versus unallocated tasks.</li></ol>
<b>Work Closure Rate</b>	Number of tasks closed every day from the beginning of the period, by category. <ul style="list-style-type: none"><li>Average Closure: number of tasks the team closed in this period divided by the number of days.</li><li>Closed Today: number of tasks the team closed on that day.</li><li>Closed this week: number of tasks the team closed in that week, inclusive.</li></ul>
<b>Amount of Work Completed versus Overdue</b>	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
<b>Teams Leagues Table</b>	Displays information for each team member. <ul style="list-style-type: none"> <li>• Name</li> <li>• SLA</li> <li>• Workload</li> <li>• Closure Rate</li> </ul>

## 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
<b>SLA Compliance</b>	Number of cases that were completed on time, divided by the total number of cases. Displayed as a percentage.
<b>Base Cost</b>	Cost based on the number of hours it should take to complete all cases for the month.
<b>Predictive Cost</b>	The predicted cost per month if teams continue to work on the current workload.
<b>Teams Workload</b>	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.
- 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 Team Leader uses the HotOperations portal to allocate tasks for their team. From the Dashboard, team leaders can select which team to manage from the list of the teams they are defined as the team leader for. For the Team Leader, the HotOperations portal includes several sub-pages.

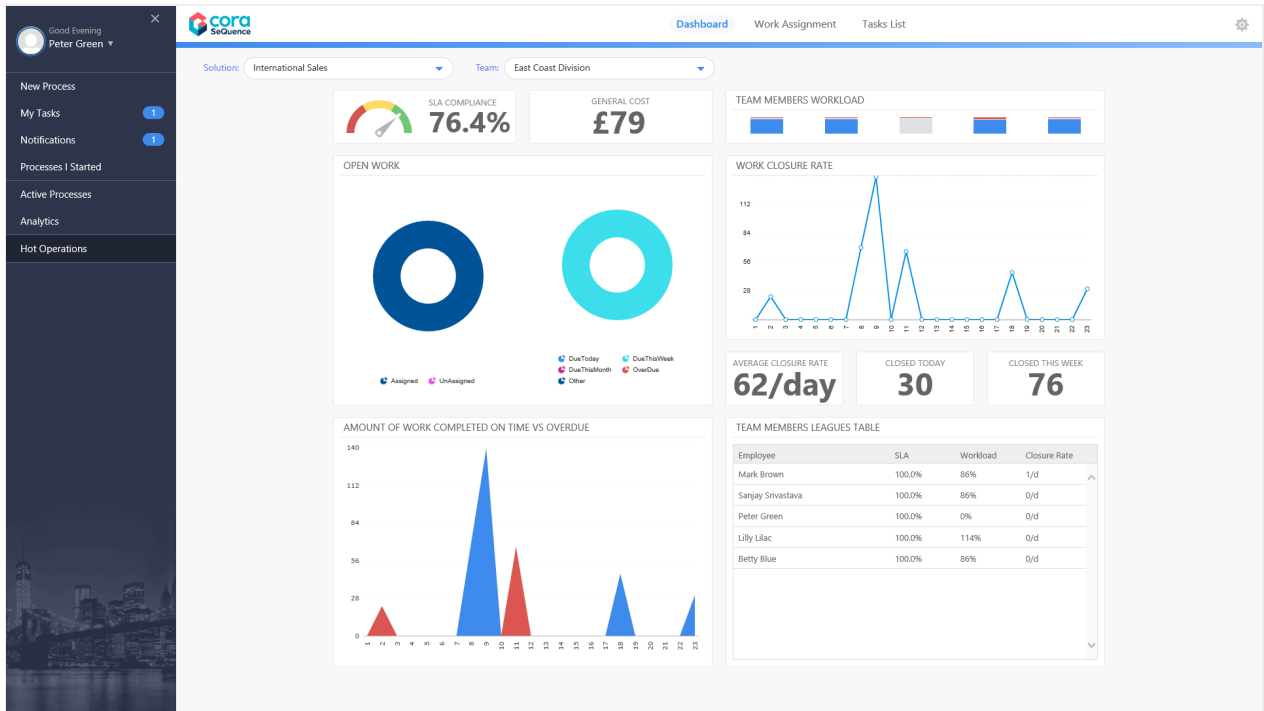
### Dashboard

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	<ol style="list-style-type: none"><li>Number of tasks by due date category.<ul style="list-style-type: none"><li>Overdue</li><li>Due today</li><li>Due this week</li><li>Due this month</li><li>Other</li></ul></li><li>Number of allocated assigned tasks versus unallocated tasks.</li></ol>
Work Closure Rate	Number of tasks closed every day from the beginning of the period, by category. <ul style="list-style-type: none"><li>Average Closure: number of tasks the team closed in this period divided by the number of days.</li><li>Closed Today: number of tasks the team closed on that day.</li><li>Closed this week: number of tasks the team closed in that week, inclusive.</li></ul>
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	<p>Displays information for each team member.</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• SLA</li> <li>• Workload</li> <li>• Closure Rate</li> </ul>



## 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.

### Team Leader Work Assignment Page

Visual	Description
SLA Compliance	Number of cases that were completed on time, divided by the total number of cases. Displayed as a percentage.
General 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.

## Visual

## Description

### Team Members Workload

The percentage that each team is utilized for case work, out of their available monthly work hours.

Good Evening  
Peter Green

Dashboard Work Assignment Tasks List

Solution: International Sales Team: East Coast Division

SLA COMPLIANCE 76.4% GENERAL COST £79 TEAM MEMBERS WORKLOAD

ASSIGNED WORK BY TEAM MEMBER

UNASSIGNED WORK

Mark Brown

- Action Return Goods by Helen Jones #124824 In 1 day
- Action Return Goods by Gee Eyejoe #124830 In 1 day
- Action Return Goods by Grace Enfavour #124831 In 1 day
- Action Return Goods by Jonathan Johns #124838 In 1 day
- Action Return Goods by OIqa Konetsikov #124839 In 1 day
- Action Return Goods by Grace Enfavour #124844 In 1 day

Sanjay Srivastava

- Action Return Goods by Tom Finer #124817 In 1 day
- Action Return Goods by George Johns #124843 In 1 day
- Action Return Goods by Nancy Norbitt #124845 In 1 day
- Action Return Goods by Dave Davids #124846 In 1 day
- Action Return Goods by Trevor Mintz #124850 In 1 day
- Action Return Goods by Ed Edwards #124852 In 1 day

Peter Green

Drag work here

Lilly Lilac

- Action Return Goods by Joe Low #124818 In 1 day
- Action Return Goods by Teresa Green #124822 In 1 day
- Action Return Goods by Lee Laa #124823 In 1 day
- Action Return Goods by Amber Nectar #124825 In 1 day
- Action Return Goods by Nula Yorkie #124851 In 1 day
- Action Return Goods by Dave Davids #124853 In 1 day
- Action Return Goods by Buck Ingham #124857 In 1 day
- Action Return Goods by Jonathan Johns #124858 In 1 day

Betty Blue

- Action Return Goods by Indiana Jones #124829 In 1 day
- Action Return Goods by Abby Gate #124832 In 1 day
- Action Return Goods by Simon Sayed #124836 In 1 day
- Action Return Goods by Chandler Candle #124837 In 1 day
- Action Return Goods by Zoe Zoo #124859 In 1 day
- Action Return Goods by Gina Tonic #124860 In 1 day

## 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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Case Id	Case Created	Task	Task Due Date	Assigned	Task Fetched	Case Stage	Due Date	Case Title	Priority	Case Sub Type
124817	23/01/2018	Action Case	24/01/2018			Action	24/01/2018	Return Goods by Tami Frazier	Low	Return Goods
124818	23/01/2018	Action Case	24/01/2018	Lilly Lilac		Action	23/01/2018	Return Goods by Joe Low	Low	Return Goods
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124824	23/01/2018	Action Case	24/01/2018	Mark Brown		Action	22/01/2018	Return Goods by Helen Jones	Medium	Return Goods
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124829	23/01/2018	Action Case	24/01/2018	Betty Blue		Action	23/01/2018	Return Goods by Indiana Jones	Low	Return Goods
124820	23/01/2018	Action Case	24/01/2018	Mark Brown		Action	20/01/2018	Return Goods by Eel Fygap	Medium	Return Goods
124831	23/01/2018	Action Case	24/01/2018	Mark Brown		Action	20/01/2018	Return Goods by Grace Enlamur	Medium	Return Goods
124832	23/01/2018	Action Case	24/01/2018	Betty Blue		Action	22/01/2018	Return Goods by Abby Gate	Low	Return Goods
124826	23/01/2018	Action Case	24/01/2018	Betty Blue		Action	24/01/2018	Return Goods by Simon Sayed	Low	Return Goods
124827	23/01/2018	Action Case	24/01/2018	Betty Blue		Action	23/01/2018	Return Goods by Chandler Canille	Low	Return Goods
124838	23/01/2018	Action Case	24/01/2018	Mark Brown		Action	23/01/2018	Return Goods by Jonalhen Jofras	Low	Return Goods
124839	23/01/2018	Action Case	24/01/2018	Mark Brown		Action	24/01/2018	Return Goods by Olga Konotalkov	Low	Return Goods
124843	23/01/2018	Action Case	24/01/2018			Action	23/01/2018	Return Goods by	Low	Return Goods

## V8.6

### Overview

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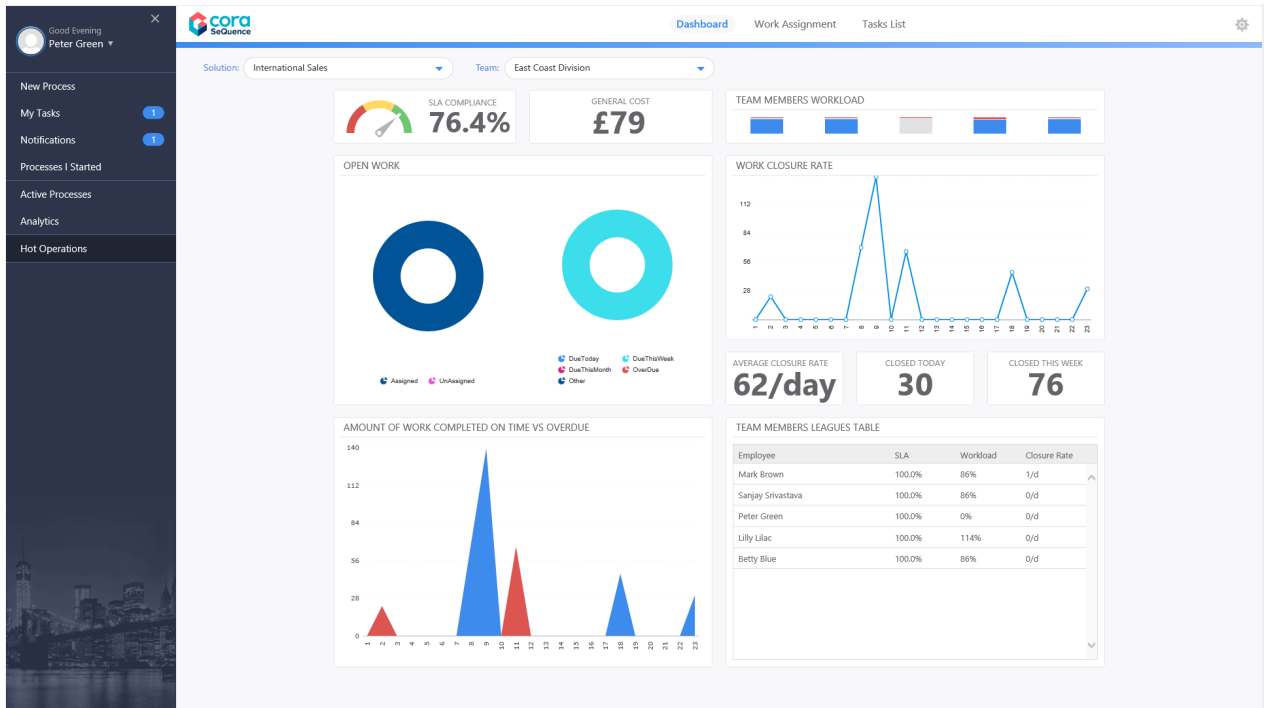
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Visual	Description
Open Work	<ol style="list-style-type: none"> <li>Number of tasks by due date category. <ul style="list-style-type: none"> <li>Overdue</li> <li>Due today</li> <li>Due this week</li> <li>Due this month</li> <li>Other</li> </ul> </li> <li>Number of allocated assigned tasks versus unallocated tasks.</li> </ol>
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## Tasks List Page

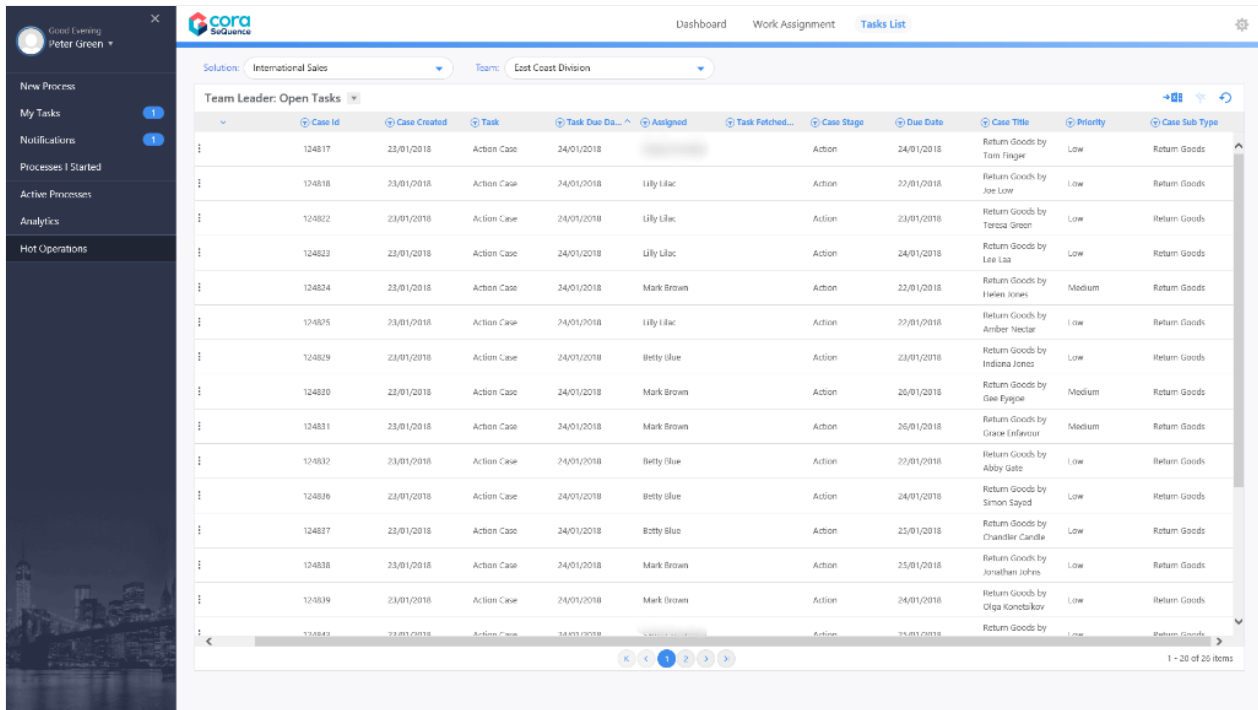
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## V8.7

### Overview

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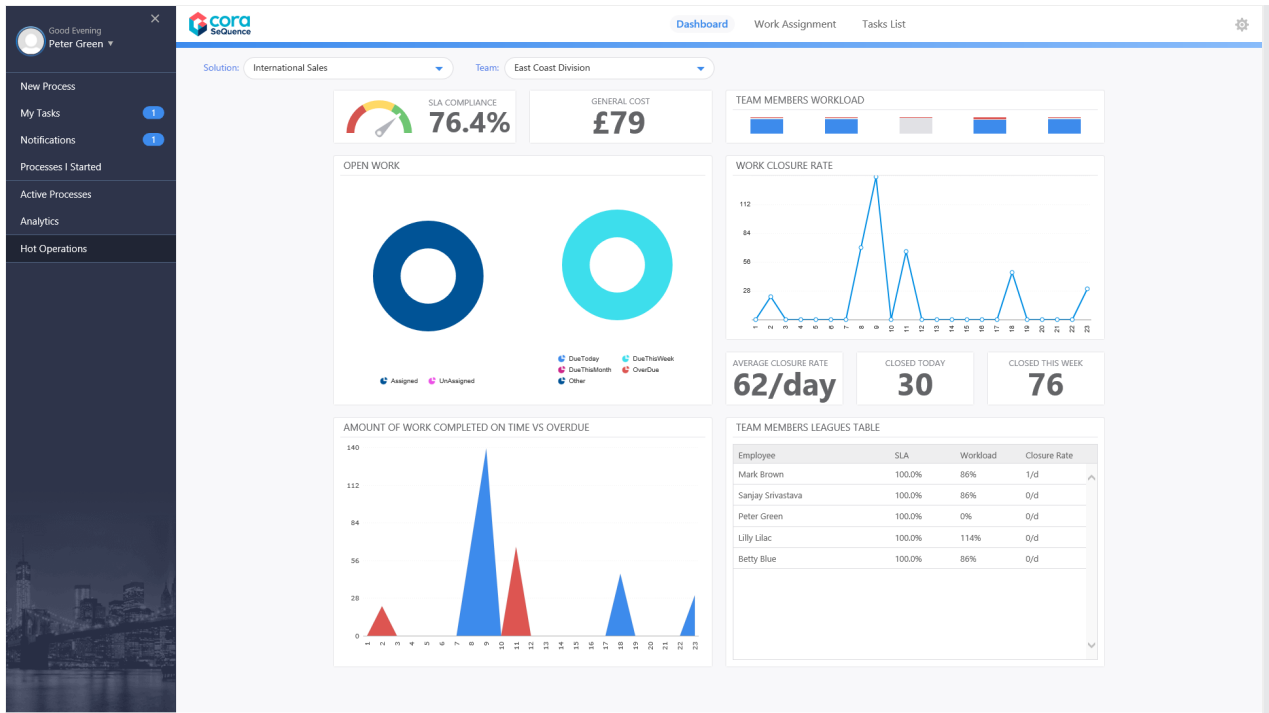
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Visual	Description
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<b>Open Work</b>	<ol style="list-style-type: none"> <li>1. Number of tasks by due date category. <ul style="list-style-type: none"> <li>◦ Overdue</li> <li>◦ Due today</li> <li>◦ Due this week</li> <li>◦ Due this month</li> <li>◦ Other</li> </ul> </li> <li>2. Number of allocated assigned tasks versus unallocated tasks.</li> </ol>
<b>Work Closure Rate</b>	<p>Number of tasks closed every day from the beginning of the period, by category.</p> <ul style="list-style-type: none"> <li>• Average Closure: number of tasks the team closed in this period divided by the number of days.</li> <li>• Closed Today: number of tasks the team closed on that day.</li> <li>• Closed this week: number of tasks the team closed in that week, inclusive.</li> </ul>
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<b>Teams Leagues Table</b>	<p>Displays information for each team member.</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• SLA</li> <li>• Workload</li> <li>• Closure Rate</li> </ul>



## Work Assignment Page

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

### Team Leader Work Assignment Page

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<b>Team Members Workload</b>	The percentage that each team is utilized for case work, out of their available monthly work hours.

The screenshot displays the CORA Work Assignment dashboard. At the top, it shows the user 'Peter Green' and navigation options for 'Dashboard', 'Work Assignment', and 'Tasks List'. The dashboard includes several key metrics: 'SLA COMPLIANCE' at 76.4%, 'GENERAL COST' at £79, and 'TEAM MEMBERS WORKLOAD' represented by a bar chart. The main section is a Kanban board titled 'ASSIGNED WORK BY TEAM MEMBER' with columns for team members: Mark Brown, Sanjay Srivastava, Peter Green, Lilly Lilac, and Betty Blue. Each column contains a list of tasks, such as 'Action Return Goods by Helen Jones' or 'Action Return Goods by Tom Finer', with a 'In 1 day' status and a three-dot menu icon. A 'Drag work here' icon is visible in the Peter Green column. A sidebar on the left contains navigation links like 'New Process', 'My Tasks', 'Notifications', 'Processes | Started', 'Active Processes', 'Analytics', and 'Hot Operations'.

## 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. In some organizations, the Team Leader can set a case as important or not by clicking the Importance flag.

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

You can sort the tasks list columns:

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Guest User: Peter Green

- New Process
- My Tasks (1)
- Notifications (1)
- Processes I Started
- Active Processes
- Analytics
- Hot Operations



Solution: International Sales | Team: East Coast Division

Team Leader: Open Tasks

Case Id	Case Created	Task	Task Due Date	Assigned	Task Fetched...	Case Stage	Due Date	Case Title	Priority	Case Sub Type
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124843	23/01/2018	Action Case	24/01/2018			Action	23/01/2018	Return Goods by	Low	Return Goods

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