Manage Cases as Team Member

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V3.0 and later

The way to manage cases can be different for different roles in Cora OpsManager.

As a Team Member, you can manage cases by resolving and closing the cases assigned to you. Go to **Flowtime** > **Ops Manager** > **My Tasks > Ops Manager**. You will see your tasks list displayed.

From the System View list, select one of the following:

- **Default View** - shows the list of tasks in the Open and Completed tab.
- **Assigned** - shows the list of tasks assigned to the members of the selected team.
- **Unassigned** - shows the list of tasks not assigned to any member of the selected team.
- **In Progress** - shows the list of tasks assigned and fetched by the members of the selected team.

NOTE
The **Completed** tab is not active for system views because this tab already displays a specific view of the data. You cannot apply additional filters to it.

You can save the view that best fits your needs, for future use. For more details, see theWorking with Flowtime Grid Views article.

The task grid is divided into two tabs, based on the task status:

- **Open**: displays the list of tasks assigned to you.
- **Completed:** displays the list of tasks that are already completed by you. For example, if a new case comes in, and you perform indexing on it, this task will be presented under completed tab, and you could see the case number under Assigned to Me tab.

You can choose the columns you want to view in the grid. Click**Columns**, and select the column names you want to display.

To sort the list based on one or more columns,

1. Click **Sorting**.
2. In the **Sort by** panel, select the column from the list based on which the list is to be sorted.
3. To add another sorting column, click **+ Add Column**.
4. Click **Save**.

You can add filter criteria on the grid by clicking**Filters**.

1. Click **Select Filters** to display the list of columns based on which the grid can be filtered.
2. Select one or more column names. The selected column name fields appear next to **Select Filters** for you to add the filter criteria.
3. Click the filter icon in the respective column name, and add the filter value.
4. Click **Filter**.

NOTE

Based on the project, other columns can be presented.

An envelope is displayed next to each ID in the grid, on creation of a new case, and on receiving a new email for a case. The envelope icon with a red dot depicts an unread email. The envelop turns off once you open the task.

Click the envelope icon to mark the mail as read or unread, without opening the case. The read or unread of an email is not user specific. An email marked as read by one user will be displayed as read for all the users.

Select the check box on the left side of the grid for a task, to view a menu with following items:

- Fetch Tasks: to fetch the selected tasks for you.
- Return Tasks: to return the selected tasks to the unassigned list.
- Close As Spam: to close the selected tasks as Spam.
- Merge Cases: to merge two or more selected tasks.

Click the ellipsis (...) to view the context menu with these options:

- Open and Fetch: to open and fetch the task directly.
- Open: to open the task for you.
- Fetch Task: to fetch the task without opening.
- Close As Spam: to close the task as Spam without opening it.
- View Last Conversation: to show you the last message preview.
  Starting from V3.4, this option is not available.

The **Get Next Task >** button opens and fetches the next task in your queue, if push next feature is enabled.

Previous to V3.0

The way to manage cases can be different for different roles in Cora OpsManager.

To manage cases, go to **Flowtime** > **Ops Manager** > **Ops Manager Home**. The Ops Manager Home page appears with Manage Cases section asking for role selection (Operations Manager, Team Leader, or Team Member).

Manage cases as Team Member

As a Team Member, you can manage cases by resolving and closing the cases assigned to you. Navigate to Ops Manager Home, and click Team Member under Manage Cases section. You will see your tasks list displayed.

The grid is divided into three sections:

- **Assigned to Me –** displays the list of tasks assigned to you.
- **In Progress –** displays the list of tasks you are working on.
- **Completed –** displays the list of tasks that are already completed by you. For example, if a new case comes in, and you perform indexing on it, this task will be presented under completed tab, and you could see the case number under Assigned to Me tab.

You can filter or sort the list by these parameters:

- Case ID
- Priority
- Target Date
- Created
- From
- Subject
- Case Status
- Case Category
- Case Type
- Case Sub-Type
- Country

NOTE
These are the default columns in the grid. Based on the project, other columns can be presented.

An envelope is displayed against each case ID in the grid, on creation of a new case, and on receiving a new email for a case. The envelope icon with red dot depicts the email as unread. The envelop turns off once you open the case.

You can also click the envelope icon to mark it read or unread without opening the case. The read or unread of an email is not user specific. An email if marked as read by one user will be displayed as read for all the users.

If you select the check box on the left side of the grid for a task, you will see a menu where you can:

- Fetch Tasks - to fetch a task for you.
- Return Tasks - to return the task to unassigned list.
- Close As Spam - to close a case as Spam.
- Merge Cases - to merge two or more selected cases.

If you click on the ellipsis (...) you will see context menu with these options:

- Open and Fetch - to open and fetch the task directly.
- Open - to open the task for you.
- Fetch Task - to fetch the task by the user.
- Close As Spam - to close the case as Spam.
- View Last Conversation - to show you the last message preview.

The **Get Next Task >** button allows you to open and fetch the next task in your queue if push next feature is enabled.