Manage Cases as Operations Manager

Last Modified on 06/30/2021 7:00 am EDT

V3.0 and later

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

As an Operations Manager, you can manage cases by resolving and closing the cases assigned to you. Go to **Flowtime** > **Ops Manager** > **Case Management**. You will see a Case Management sub menu with the following three menu items:

- Case List
- Assignment Board
- Dashboard

Case list

This page displays the lists of all the Opened, Allocated, Unallocated, In Progress, and Completed cases in Cora OpsManager. As an Operations Manager, you have access to all these cases.

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

- **Default View**: shows the list of cases in the Open and Completed tab.
- **Allocated**: shows the list of cases not allocated to different teams.
- **Unallocated**: shows the list of cases not assigned to any team.
- **In Progress**: shows the list of cases assigned and fetched by the members of a team.

NOTE
The **Completed** tab is not active for system views because this tab already displays a specific view of the data.

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 displays tasks under two tabs, based on the task status:

- **Open** - shows the list of all the open cases.
- **Completed** - shows the list of cases already completed and closed.

You can choose the columns you want to view in the grid. Click**Columns**, and select the column name check boxes 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 name check boxes. **New 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 field, and add the filter value.
4. Click **Filter**.

An envelope appears next to the 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 case.

Click the envelope icon to mark the mail as read or unread, without opening the case. An email marked as read by one user is displayed as read for all the users.

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

- Reallocate: to allocate the case to another team/group.
- Open: to open the task for you.
- Close As Spam: to close the case as Spam.
- View Last Conversation: to show you the last message preview.
  Starting from V3.4, this option is not available.

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

- Reallocate: to allocate a case to another team.
- Close As Spam: to close the case.
- Merge Cases: to merge two or more selected cases.

Allocation board

On this page, you can see in different queues, all the cases allocated to different teams, and the unallocated cases.

The Unallocated Work section displays the list of all the unallocated cases. In the Allocated Work By Teams section, there is a queue per team displaying the respective cases assigned to the team. The Subject, Status, and Case ID details are displayed for each case in the list.

You can filter the tasks in the queues using the **Filters** option. This filter option works same as explained above.

Click the more options icon (three dots) for a case to display context menu with the following option:

- Reallocate: to allocate the case to another team.

Dashboard

The dashboard for Operations Manager displays all the analytics for all the teams in Cora OpsManager.

A dashboard helps you to keep track of the metrics and analyze case progress. It displays the data in form of tables, graphs, bar charts and line charts based on the way they have been configured. It offers real time monitoring of data thus saving your time.
You can save the dashboard data to your system in form of reports to view later. Some of the dashboards also provide real time data filters. All this is configured at the time of dashboard creation.

All dashboard objects are filtered by the Team filters. For the dashboards with "Current" in their titles, the default date range is the current month.

For the list of available Out of the box dashboards for Operations Manager see OOTB Dashboards for Operations Manager article.

For list of additional measurements and trends dashboards see, Dashboards in Cora OpsManager article.

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 Operations Manager

As an Operations Manager, you manage cases by allocating the cases to different teams or by closing the cases as spam. Navigate to Ops Manager Home, and click Operations Manager under Manage Cases section. You will land on the Case List by default.

You may navigate to other tabs from the top menu. The available options are:

- Dashboard
- Work Allocation

Operation Manager Dashboard

The dashboard for Operations Manager displays all the analytics for all the teams in Cora OpsManager.

A dashboard helps you to keep track of the metrics and analyze case progress. It displays the data in form of tables, graphs, bar charts and line charts based on the way they have been configured. It offers real time monitoring of data thus saving your time.
You can save the dashboard data to your system in form of reports to view later. Some of the dashboards also provide real time data filters. All this is configured at the time of dashboard creation.

All dashboard objects are filtered by the Team filters. For the dashboards with "Current" in their titles the default date range is the current month.

For the list of available Out of the box dashboards for Operations Manager see OOTB Dashboards for Operations Manager article.

For list of additional measurements and trends dashboards see, this article.

Work Allocation

On this tab, operations manager is able to see in different queues, all the cases allocated to his operation divided by teams, and a queue for unallocated cases, which are not assigned to any team yet.

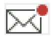
For each case, the Case ID and subject is displayed in the queue.

Click the more options icon (three dots) against a case to display context menu with the following options:

- Change Properties - to change the case details and properties.
- Reallocate - to allocate the case to a team.

Case list

Lists of all the Opened, Allocated, Unallocated, In Progress, and Completed cases in Cora OpsManager are displayed here.

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

- Reallocate - to allocate the case to another team/group.
- Open - to open the task for you.
- Close As Spam - to close the case as Spam.
- View Last Conversation - to show you the last message preview.

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

- Reallocate - to allocate a case to another team.
- Close As Spam - to close the case.
- Merge Cases - to merge two or more selected cases.