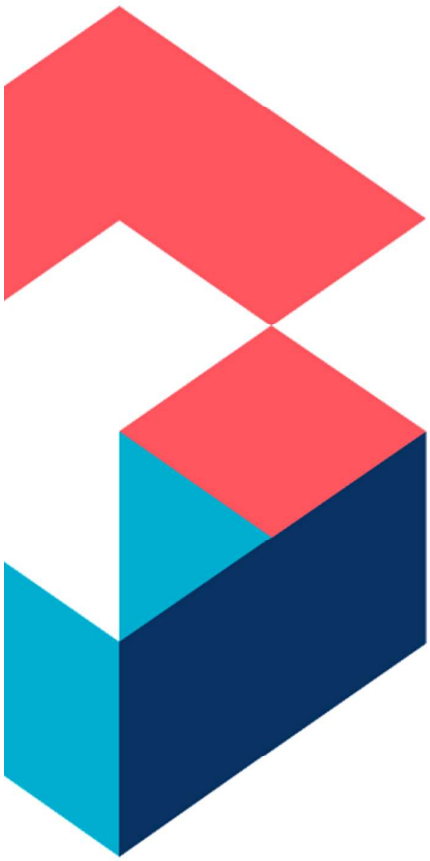

Cora Sequence Ops Manager – All you need to know – From a developer stand point

cora OpsManager

Contents

Purpose of the Document

This document helps developers configure and customize Ops Manager.

Document Details

Version	1.4
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Overview

Ops Manager is a case management solution for managing operational requests. These requests could be a case, an issue or a query raised internally or externally by customers, employees or vendors.

It offers multi-channel support thus making it easy for the requestors to create a case through email, organization portal, or bulk upload.

The purpose of this document is to explain how to configure and customize the product so it will meet the organization requirements.

Important notice for developers

You must NOT make any changes to the existing product settings and workflows on Admin console. Otherwise, you will not be able to upgrade the product or you can damage the system.

If a change is required, contact the product manager.

Configuration – Administration Flowtime

You can configure Ops Manager in Flowtime under the Administration tab. Only users in “Power Users” group have access to this section while for all other users an “access denied” message appears.

To add yourself to “Power Users” group:

1. On Administration console, go to **Edit Organization** under Manage Organization tile.
2. Expand Entire Organization on the left panel.
3. From the tree, expand Ops Manager.
4. Right click Power Users, and click Quick Add Employee.
5. Double click your user name from the Employees list.
6. Click **Save**.

Under Administration tab, there are various options to configure Ops Manager.

Categories

On this tab, add categories.

To add category:

1. Click **+Add New Category**.
2. Insert the category name.
3. Click insert.

Multi-language support

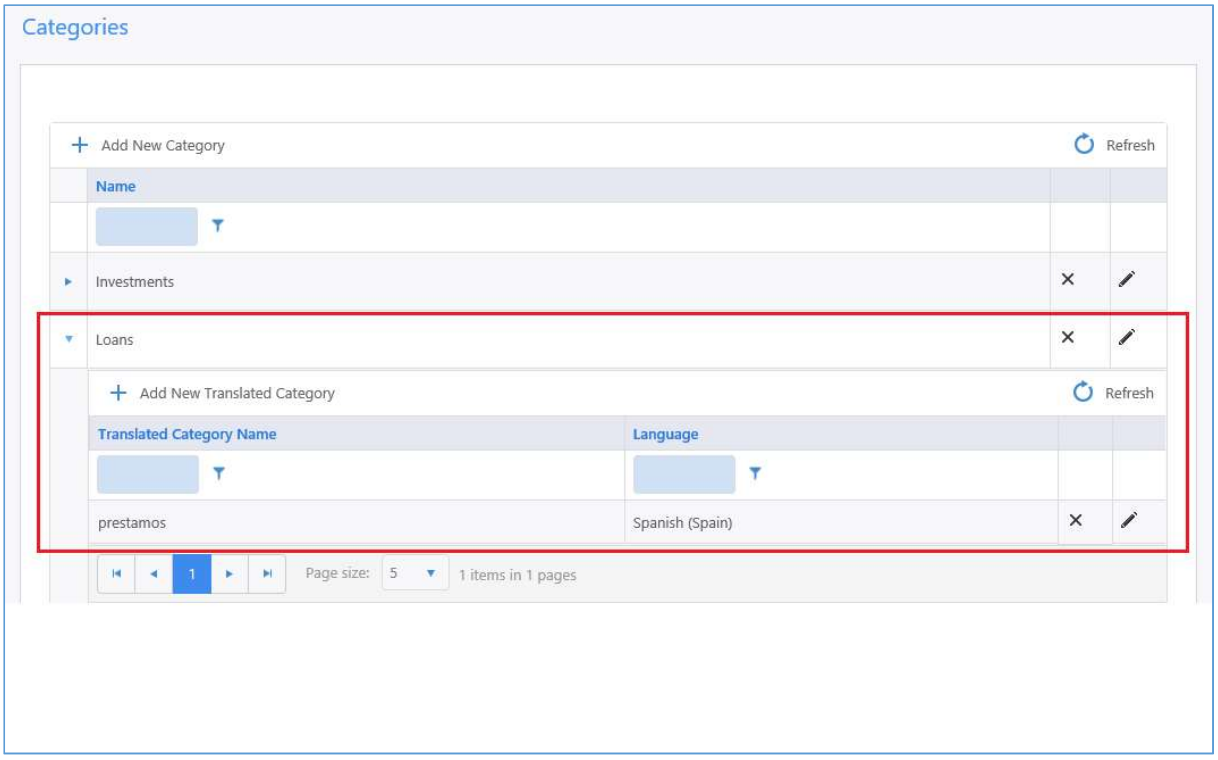
Ops Manager offers multi-language support for Categories. While creating a Category, you may choose to add the translation values in preferred language.

Note: Ops Manager currently supports only Spanish and Portuguese languages.

Add the value for the properties in English, and then add the translation of the value in your preferred language.

To add translation:

1. Expand a Category, and click **Add New Translated Category**.
2. Add the translated category name, and select the language.
3. Click insert.



Types

On this tab, add a Type to an existing Category.

To add a Type, you must select a Category from the respective drop-down list, and then provide a name to the Type.

Multi-language support

To add Type in preferred language, add the value for the Type in English, and then add the translation of the value in your preferred language, same as we did for Category.

Sub Types

On this tab, add a sub type to an existing combination of Category and Type.

You must select a Category and a Type from the respective drop-down lists, and then add a name to the Sub Type.

Multi-language support

To add Sub Type in preferred language, add the value for the Sub Type in English, and then add the translation in your preferred language, same as we did for Category and Type.

Configuration Sets

Defining a Configuration Set is the foundation of Ops Manager. A Config Set comprises of a Category, Type and a Sub Type.

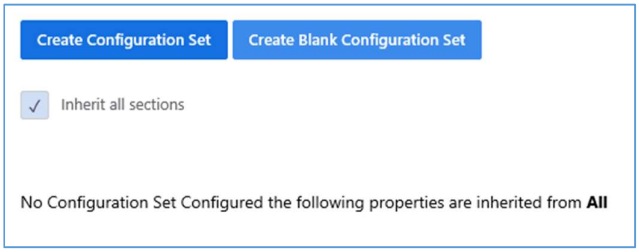
To define a Config Set, you must add properties on the Config Set tab.

To define a Config Set:

1. Select a Set (combination of Case Category, Type and Sub Type).
2. For a new config set, choose one of the two options to define properties:

- **Create inherited configuration set** - allows you to create an inherited configuration set. The selected configuration set inherits the properties from an existing parent configuration set. You may edit properties as per need.
- **Create blank configuration set** – will not inherit any property from parent config set.

*As best practice, we recommend to first create “All Set” (by selecting All, All and All in the Category, Type and Sub Type drop-down lists), and inherit from it for the other sets.



Note: The inherited configuration applies only once, and after creating a new set any changes made to the parent set will not affect the new set.

For a Configuration Set, configure properties on the following tabs of Configuration Sets page:

- Details

- SME SLA
- Reminders
- Actions
- System Actions Reasons
- Email Templates

Config Set Details

On this tab of configuration sets page, add details of a Set:

Field name	Field type	Lookup name/Source	Comments
Set Name	Free text		Unique name for Case Set. By default, appears as per the Category, Type, and Sub Type selected for the Set. Category > Type > Sub Type
Case Creation Template	Combo box	A list of all the emails that were defined in Email Templates section (language will be English).	Default email template for a new case. This template will be in use when a notification on case creation for this set should be sent. If you don't want to send an email leave this field empty.

Field name	Field type	Lookup name/Source	Comments
Client Properties View	Free text	Go to Workflow > Customizations > Views > ICM Customizable view.	Fields appear in the properties section of a Case. The view name is in ICM Customizable views → Client properties view. Inside client properties views, create two views: • View • ViewRO (no space!) **View** refers to the name of the view and **ViewRO** is the name of the read only view. When creating new view, duplicate the Test view, which has the style guideline for this form.
Case Priority	Combo box	High/Medium/Low/Standard	To define priority of a Case.
Is Indexing Required?	Check box		If it is selected, the case will go to indexing regardless the input channel definition.
TAT	Numeric		Turnaround time Define the amount of time allowed to solve cases from this kind of configset.
TAT Unit	Combo box	• Hour (business hours) • Day • Business Day • Week • Month • Hours from start of working day	Unit in which TAT is calculated. For details, refer to TAT settings section below.

Field name	Field type	Lookup name/Source	Comments
Priority Specific TATs	Grid	Columns in the grid: • Priority • TAT • TAT Unit • Ignore Cut Off (start calculating the TAT regardless of the time the case is received).	To define the TAT for the case based on priority, in case default priority is changed.

TAT Settings

Turnaround Time (TAT) refers to the time taken to respond to a request or query. It defines the target date (Creation Date + TAT = Target Date).

Beside the TAT that was defined in the set, there are other elements that are taken into account when the target date is calculated.

1. TAT Time Params lookup (Administration > Lookup Tables > ICM Calculate Target Date > TATTimeParams) has the following attributes:
   - UserId – the User Id whose time zone will be used to calculate the target date. We recommend to use system user for this field.
   - CalendarId – the calendar that will be used to calculate target date (you can define working days and non-working days in the calendar).
   - HoursInBusinessDay – number of hours your organization works in a day.

2. Cut off time – the time after which the target date will start calculating, for a case, from the beginning of the following business day. To define the Cut off, go to Administration > Lookup Tables > ICM Data Model > Platformconfig, and set TAT Calculation Cut Off.

   Calculation Types Examples:

   * All examples below use the following rules:

   - Cut-Off is 14:00 hours.
   - Start of Working Day is 08:00 hours.
   - End of Working Day is 18:00 hours.
   - There is 10 hours in a working day.
   - Workings days are Monday - Friday.

Name	Description	Before Cut-Off	After Cut-Off
Hour	Number of working hours from case received (or next	Hours: 6	Hours: 6

Name	Description	Before Cut-Off	After Cut-Off
	working day after cut-off).	Received: Thursday 11:00 hours Start Time: Thursday 11:00 hours Target Date: Thursday 17:00 hours Hours: 6 Received: Thursday 13:00 hours Start Time: Thursday 13:00 hours Target Date: Friday 09:00 hours (5hours on Thursday and 1 hours on Friday)	Received: Thursday 15:00 hours Start Time: Friday 08:00 hours Target Date: Friday 14:00 hours Hours: 6 Received: Friday 15:00 hours Start Time: next Monday 08:00 hours Target Date: Monday 14:00 hours
Day	Number of days from date received (or next working day after cut-off).	Days: 1 Received: Thursday 11:00 hours Start Time: Thursday 11:00 hours Target Date: Friday 11:00 hours Days: 1 Received: Friday 11:00 hours Start Time: Friday 11:00 hours Target Date: Saturday 11:00 hours	Days: 1 Received: Thursday 17:00 hours Start Time: Friday 08:00 hours Target Date: Saturday 08:00 hours Days: 1 Received: Friday 17:00 hours Start Time: next Monday 8:00 hours Target Date: Tuesday 8:00 hours
Business Days	Number of working days from date received (or	Days: 1 Received: Thursday 11:00 hours	Days: 1 Received: Thursday 17:00 hours

Name	Description	Before Cut-Off	After Cut-Off
	next working day after cut-off).	Start Time: Thursday 11:00 hours Target Date: Friday 11:00 hours Days: 1 Received: Friday 11:00 hours Start Time: Friday 11:00 hours Target Date: Monday 11:00 hours	Start Time: Friday 08:00 hours Target Date: Monday 08:00 hours
Week	Number of weeks from date received (or next working day after cut-off).	Week: 1 Received: Thursday 11:00 hours Start Time: Thursday 11:00 hours Target Date: Thursday (Next Week) 11:00 hours Weeks: 1 Received: Saturday 11:00 hours Start Time: Saturday 11:00 hours Target Date: Saturday (Next Week) 11:00 hours	Days: 1 Received: Thursday 17:00 hours Start Time: Friday 08:00 hours Target Date: Friday (Next Week) 08:00 hours
Month	Number of months from date received (or next working day after cut-off).	Months: 1 Received: 01-Jan 11:00 hours Start Time: 01-Jan 11:00 hours Target Date: 01-Feb 11:00 hours	Months: 1 Received: 01-Jan 11:00 hours Start Time: 02-Jan 08:00 hours Target Date: 02-Feb 08:00 hours

Name	Description	Before Cut-Off	After Cut-Off
Hours from Start of Working Day	Number of hours from the start of the working day (or next working day after cut-off).	Hours: 6 Received: Thursday 11:00 hours Start Time: Thursday 08:00 hours Target Date: Thursday 14:00 hours	Hours: 6 Received: Thursday 15:00 hours Start Time: Friday 08:00 hours Target Date: Friday 14:00 hours

SME SLA

On this tab of configuration sets page, add an SLA for an SME.

For each priority, you can set an SLA for SME. When an operator will send the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

Reminders

On this tab of configuration sets page, add Reminder settings.

A Reminder is sent for an email id when no response is received after X days. You can set a maximum of three reminders for each config set.

Once the case is closed, the reminders will not be sent anymore.

Actions

On this tab of configuration sets page, set Actions for a config set. These Actions are defined as per Case status.

When the Case Set reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

Some actions require reasons, and therefore **Manage Reasons** button will appear. You must add at least one reason if this button appear. Each reason is "hierarchic tree field" that allows you to type the reason in preferred languages.

Actions available Out of the box:

Action Name	Result	Case status changes to	Comments
On Hold	Puts the case on hold. Reason is required.	On hold	Add Make Available for On hold action.
Send Approval Email	Generates PDF summary of a case and allows user to send email for external approval.	Awaiting Approval	The Subject of the email will have [Approval] in the subject On receiving approval response, the case status changes to "Approval Response Received".
Make Available	Makes a case available for processing.	Ready for Processing Or The status that was previous to "On Hold" except when the status was "With QA"/"Awaiting Response"/"Pending Closure"/"On Hold". In such case, the status will change to the status that was previous to those statuses.	It's recommended to add Make Available action for On hold, Awaiting response, Approval response received, Pending closure response received, Internal request response received, and Approval cycle rejected.
Close	Closes a Case.	Complete	Skips "pending closure" and "QA" for a case.
Reject	Closes a Case.	Rejected	Rejects a case without further processing.
Pending Closure	Checks if QA is needed. • If Yes and QA is blocking, QA task generated and assigned to QA's in	Pending Closure/ with QA	Reason is required. In case the response is received after Pending Closure, the status

Action Name	Result	Case status changes to	Comments
	Team. Status is updated to With QA. • If Yes and QA is non-blocking, QA task generated and assigned to QA's in Team, Status is updated to Pending closure and Pending closure email is sent to requestor. • If QA is not needed, status is updated to Pending closure and Pending closure email is sent to requestor.		changes to "pending closure – response received".
Send to Team Leader	Sends case to the team leader.	With Team Lead	
Back to Team Member	Sends case back to assigned processor.	Ready for Processing	Use only when the status is "With team leader".
Send to SME	Assigns case to the selected SME.	With SME	To assign a case to SME, an SME must exist in a Team.
SME Return to Processor	Returns case to the user who sent to SME.	SME Responded	Use only when the status is With SME.
SME Return to Team	Returns case to the team.	SME Responded	Use only when the status is With SME.

Note: There is an option to create custom actions, see more under customization section.

System Actions Reasons

On this tab of configuration page, system actions are configured. These actions are supported with reasons.

The following are the system actions that appear for a case in all statuses (except of indexing phase):

- Send email
- New request

- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Send an email outside of Ops Manager	Awaiting response	When a response is received the status changes to the previous status before "Awaiting Response".
New Request	Sends a task to another team in Ops Manager.	Internal Request	Once a response is received the status changes to "Internal request response received".
QA Passed	Updates QA result to pass.	If QA blocking, Status updated to Pending Closure. If QA not blocking, the case status remains "Pending Closure".	Presented only when the status is With QA.
QA Failed	Updates QA result to fail.	If QA blocking, status updated to Audit Correction. If QA not blocking, the case status remains "Pending Closure".	Presented only when the status is With QA.
Reject (In indexing task)	Closes the case.	Rejected	

New Email Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, If you want to change the status of the case to "Pending Closure" (instead of awaiting response), select the "Set Pending Close" check box.

New Request Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.

- If you want that a specific reason should change the status of the case to “Pending Closure” (instead of internal request), you should select the “Set Pending Close” check box.

Reject (In indexing task) Reasons

- Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the “Send Reject Email” check box).

Note: If no reasons are configured for a Set, the reject button will not appear in the indexing task.

*Best practice advice: When case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

QA Fail Reasons

- Add reasons for Fail action.

Note: Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

Email Template

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates will be presented to the operator in the new email window of the case, on clicking “Choose Email Template”.

Email Templates

On this tab, the user generates email templates that are used in cases.

To create new template:

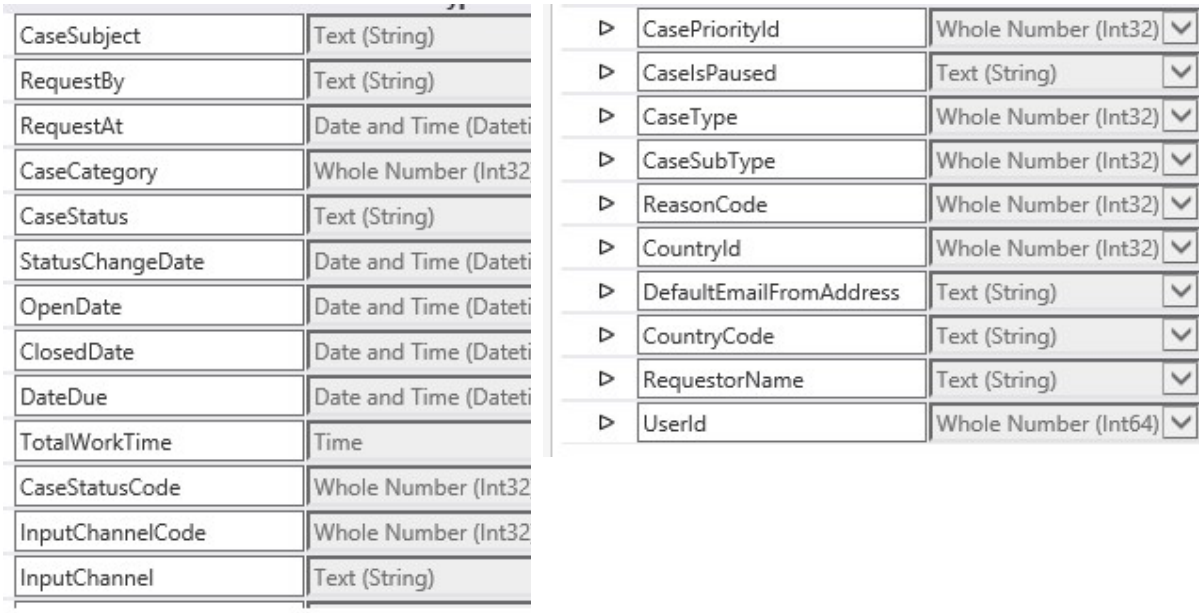
1. Click **Add New Record**.
2. Give your template a name and click insert.
3. Click **Edit content**. A popup window appears where you may choose language and content (with rich text editor) for the template.

Available languages: English, French, Spanish, Portuguese, Chinese, Italian, German, Japanese, Russian and Korean.

While creating a template you may use some of the following expressions:

Case subject, Request By, Case category, case status, status change date, open date, closed date, date due, total work time, case status code, input channel code, input channel, case priority Id, case is paused, case type, case sub type, reason code, country id, default email from address, country code, requestor name, UserID.

The convention of using these expressions: {{: it.fldMasterIWfId }}



CaseSubject	Text (String)
RequestBy	Text (String)
RequestAt	Date and Time (Dateti
CaseCategory	Whole Number (Int32
CaseStatus	Text (String)
StatusChangeDate	Date and Time (Dateti
OpenDate	Date and Time (Dateti
ClosedDate	Date and Time (Dateti
DateDue	Date and Time (Dateti
TotalWorkTime	Time
CaseStatusCode	Whole Number (Int32
InputChannelCode	Whole Number (Int32
InputChannel	Text (String)

CasePriorityId	Whole Number (Int32)
CaseIsPaused	Text (String)
CaseType	Whole Number (Int32)
CaseSubType	Whole Number (Int32)
ReasonCode	Whole Number (Int32)
CountryId	Whole Number (Int32)
DefaultEmailFromAddress	Text (String)
CountryCode	Text (String)
RequestorName	Text (String)
UserId	Whole Number (Int64)

To show the body of the original message use one of the following options:

- Plain text – {{: it.MessagePlainText}}
- Html {{= it.Query }}

You must have at least 3 email templates in the list:

1. Case Creation notification Template
2. Case Rejection notification Template
3. Pending Closure notification Template

Case Creation Notification Template – Example

```
Hello,
The following case has been created for you:
Case ID: {{: it.fldMasterIWfId }}
Requested By: {{: it.RequestBy }}
Subject: {{: it.CaseSubject }}
Body: •    {{= it.Query }}
Please reply to this email for further questions and make sure that the
subject contains the case ID to shorten the process time.
Regards,
Ops Manager Team
```


Case Rejection Notification Template – Example

```
Hello {{: it.RequestBy }},
Do not reply to this message.
Your case "{{: it.CaseSubject }}" has been rejected
```

Pending Closure Notification Template – Example

```
Your case has been marked as pending closure.
Case ID: {{: it.fldMasterIWfId }}
Subject: {{: it.CaseSubject }}
If you require further assistance, replying to this email, otherwise,
your case will be auto closed after X days.
```

Manage User Groups

This tab shows all the groups and users in Ops Manager, and allows you to edit the groups.

Roles in Ops Manager

- Associate – a regular processor or agent (team member).
- HotOperation Manager – is able to see sub teams.
- QA Auditor – gets cases in QA phase.
- Team Leader – is able to allocate cases between the team members.
- Employee – (do not use this).
- Manager – (do not use this).
- SME – is able to resolve queries sent to SME.

Add users to group

To add users to a group:

1. Select in the tree, the group you want to add a user to.
2. Click **Add Users**.
3. On top of the window, select the role of the users you are adding. The available roles are HotOperations Manager, Team Leader, Associate, QA Auditor, and SME.
4. Select the user you want to add and click **>>**. You may select multiple users simultaneously by using ctrl and click.
5. Click **Apply Permissions**.

To edit user permissions, click edit icon in the end of each row and choose the permissions. Click **Apply permissions** to save the permission changes.

To delete user, click delete icon (X) in the end of the row.

Apart from managing users and groups on Flowtime, you can access them from the Administration console (see customization part).

Conditional Formatting

On this page, you can configure color formatting for a case i.e. set a condition based on which the case ID will be colored in red or amber.

By Default, a case Id is green in color.

If you wish to color the case IDs in amber or red based on the target date, you need to:

1. Go to **Flowtime** > **Ops Manager** > **Administration** > **Conditional Formatting**.
2. Specify how many hours or days before the target date the case ID should be colored amber.
3. Specify how many hours or days before the target date the case ID should be colored red.
4. Click **Save**.

Reports

On this tab, the user configures reports that are displayed on Ops Manager Flowtime. To add any new report to Ops Manager, user must provide the following parameters:

- Name – Report Name
- Friendly name – Display name
- Path – the folder that stores the document
- Description
- Level authorized to see the report (if you want to display the report to some specific role, select the check box for that role):
  - Ops manager
  - Team lead
  - Associate (Team Member)

Customizations

Customizations are made on the Administration console of the application and not on Flowtime.

Allocation plan

To customize business rules (team allocations), go to **Solutions** > **Ops Manager**.

1. Under HotOperations Common Tasks section, click **Manage Plan**. Smart Allocation Plan window appears.
2. Click **Add rule** to add new rule, or click edit icon against a rule to edit.
3. Click **OK**.

You can use ICM Main Process Data Model tables' data + any variable in the main case process for rule conditions.

Best Practice advice

Most of the allocation plans in Ops Manager can be based on "Inbox", or "Category", or "Type".

As a best practice, we suggest to use the following Rules:

1. Based on "Category":
   a. Allocation rule – wf.Variables["ICMGCaseCategory"] == "X"
   b. Allocate to – the desired team.
2. Based on "Inbox":
   a. Set the group for each inbox, in mailbox routing config lookup.
   b. In allocation plan:
   - Allocation rule – !String.isNullOrEmpty({DataModel}.Query("ref:nsSharedData/CaseDetails")["AllocatedGroupPath"])
   - Allocate to – {SQL: SELECT fldid FROM tblOrganization WHERE fldPath = {{DataModel}.Query("ref:nsSharedData/CaseDetails")["AllocatedGroupPath"]}}

Add Groups to Ops manager

To add a new group:

1. Go to **Edit Organization** under Manage Organization tile. The Organization Management page appears in a separate window.
2. Expand Entire Organization on the left panel.
3. Right click on Ops Manager, to add a group.
4. Add a name and click **Save**.

General Settings

Some customizations fall under general settings for Ops Manager.

PlatformConfig lookup

In this lookup, most of the product general settings are done. To edit these settings:

Go to **Administration** > **Lookup Tables** > **ICM Data Model** > **PlatformConfig**.

IMPORTANT: Please be careful while customizing this lookup. You must NOT add any new row to the lookup and must only edit the existing row per your needs.

Below are the fields you may alter:

Field name	Type	Comments
HaveIndexingStatus	Check box	Do not edit.
CaseHierarchyDepth	Numeric	Do not edit.
DefaultPriority	Numeric	Do not edit.
DefaultSLA	Numeric	Do not edit.
UsesSMTPPriority	Check box	Do not edit.
DefaultTaskEffort	Numeric	Do not edit.
DefaultEmailFromAddress	Text	Default value in From field when creating a manual case. This address must have email listener and must have mailbox routing config record. Read more under “Adding mailboxes to Ops Manager” section.
RecipientListCacheSize	Numeric	Number of email addresses saved per processor in cache.
BaseOrganizationName	Text	OpsManager
Active	Check box	Must be checked.
BaseOrgId	Numeric	Do not edit.
AuditCalculatorWorkflowId	Grid	The workflow that will be used to calculate whether the case should go to QA or not. Read QA section for more information.

Field name	Type	Comments
AuditSampleLevel	Numeric	Chances that case will go to QA. Used only when using the audit calculator OOTB workflow. Read QA section for more information.
AuditIsBlocking	Check box	Whether the audit phase block the case or not (if not, pending closure email will be sent regardless of the QA results). Read QA section for more information.
FailedQAReturnsToOriginator	Check box	If the QA is blocking and the result is Fail, whether the case will return to the operator. Read QA section for more information.
CustomDataCopy	Check box	To use custom properties view.
CustomDataCopyWorkflowId	Grid	Workflow used to copy custom data from the manual case creation table to the case table.
TAT Calculation Cut Off	Hour	The cut-off time for receiving a case. If a case is received after this time, the target date calculation starts from the next working day. For more information, refer to TAT Settings section.
Auto Assign Indexing	Check box	To use auto assign workflow for indexing task.
Auto Assign Indexing Workspace ID	Workflow space guid	The workflow that will be used for calculation of the assignment to individual.
Auto Assign Processing	Check box	Use auto assign workflow for the main case.
Auto Assign Processing Workspace ID	Workflow space guid	The workflow that will be used for calculation of the assignment to individual.
If Indexing Auto Assign Fails move to unassigned	Check box	If the auto assign of indexing didn't find matching users, should the case go to the unassigned queue.
If Processing Auto Assign Fails move to unassigned	Check box	If the auto assign of main case didn't find matching users, should the case go to the unassigned queue.

Field name	Type	Comments
Display Country	Check box	To display the country name across cases. If selected, the field is mandatory.
PushNextEnabled	Check box	To enable Push Next feature.
PushNextType	Drop-down	To select the type of Push Next: Push: automatically pushes a new case to your task list, and pop it on the screen as soon as previous task is complete. Get: displays a message of completion of task, and asks for next action, which may be Get Next or Close window.
PushNextWorkflowSpaceId	Workflow space guid	The workflow that will be used to calculate the case that should be pushed to the user.
Display Team	Check box	To enable selection of Team. You want to display team to users when your allocation plan is based on the selection of team.
Number of days at pending closure	Text	Set the number of days, a case can stay in Pending Closure status, before it is automatically closed.
QA Edit View Path	Text	Specify the view path of the QA fields that will be displayed in “QC Parameters tab”, when the case is in “With QA” status. Read more in QA section.
QA Read Only View Path	Text	Specify the view path of the QA fields that will be displayed in “QC Parameters tab”, after QA review. Read more in QA section.
DisplayPCL	Check box	Do not edit.

Country values

If you use country field, you need to add values to the country lookup first. To do so:

1. Go to **Administration** > **Lookup tables** > **ICM Data Model** > **Country**.

2. Add record per each country.

Add or Edit Priorities

If you need to use different priorities in, you need to add values to the priorities lookup. To do so:

1. Go to **Administration** > **Lookup tables** > **ICM Data Model** > **Case Priorities**.
2. Add or Edit record per each priority.

Turn on the "Important Flag", based on case priority

If you want to turn on the flag in the grid, for some particular priority:

1. Go to **Administration** > **Lookup tables** > **ICM Data Model** > **Case Priorities**.
2. Edit the record for the priority you wish to highlight.
3. Select the **Highlight** check box.
4. Click **Update**.

Status bar and labels

To configure which statuses will appear on the bar, and when, go to **Administration** > **Lookup Tables** > **ICM Data Model** > **Statuses**.

You can configure the order in which the statuses appear on the bar with **Display order** field, and whether it should be visible always or not, with **Always visible** check box.

If not visible always, it will show the status in the bar only when this is the current status.

In the same lookup, you can change the label of the status on **StatusName** field.

Indexing base on input channel

To define which input channel required indexing, go to **Administration** > **Lookup Tables** > **ICM Data Model** > **InputChannels**.

Edit the input channel row that you wish to change, and select the "need index" check box if you want the cases created in that input channel to go to indexing.

Adding Mailboxes to Ops Manager

While settings email that Ops Manager will listen to, you need to take into consideration that you don't create too many email listeners. There is an option to auto forward emails from one inbox to another, and listen only to the later. We recommend to forward 10 inboxes to one mailbox, and listen only to that one mailbox.

There are multiple steps to configure inboxes:

1. Create email listener, by duplicating ICM Email Listener.
2. Add record to "Mailbox config" lookup.

3. Add record to “Mailbox routing config” lookup.

Create email listener workflow

To configure the email listener process, you need to duplicate the product ICM email listener process, and save it with a new name.

We recommend neither using the original email listener nor making any changes to it.

1. Go to **Administration** > **All Workflows** > **ICM Email Listener**.
2. Right click and select **Manage Versions (Active)**.
3. On pop-up window, click Create a copy of this workflow.
4. Give it a name, and click **Create**.
5. Click **Open Workflow**.
6. Select ICM Email Listener activity, and in the right menu click on the **…** button near the Job Name attribute.
7. Type the job name.
8. Select the “Job is enabled” check box.
9. Click **Next**.
10. Fill in the details in Command tab. For more information about email listener configuration, go to KB.pnmsoft.com.

    Make sure to select Include message attachments and linked resources check box.
11. Click **Next**.
12. Click **Finish**.

Connect the email listener workflow to Ops Manager

To connect an email listener workflow to Ops Manager,

1. Go to **Administration** > **Lookup Tables** > **ICM Data Model** > **MailboxConfig**.
2. Click **Add New Record**, to create new record with the following properties:

Field	Description
Email ID	Email address
User Name	The username for the email address. Mostly, same as email ID.
Server	The server on which mail is configured. Mostly, same as email ID.
Port	The port of the email server.

Field	Description
AllowCaseCreation	Select to allow creating a case through email.
WorkflowName	The workflow name of the email listener you have created.

Note: Only emails that you listen directly to should appear in this lookup.

Set Default values to each mailbox

1. Go to **Administration** > **Lookup Tables** > **ICM Data Model** > **MailboxRoutingConfig**.
2. Click **Add New Record**, to create new record with the following properties:

Field	Description
Listener mail box	Mailbox you are listening to.
Originated mail box	Mailbox from which the email is forwarded.
Legal Entity	Not in use
Region	Not in use
Team group	The team responsible for the inbox. Will be used if the allocation rules are based on the inbox, and not on category or type, or when you want to have the inbox to be selected when creating a case manually.
Country	Country set for the Case as per the originated inbox.
Case category	Category set for the Case as per the originated inbox.
Case type	Type set for the Case as per the originated inbox.
Default response language	The default language set for auto email responses.

Note: You must include in this list, a record for the listener inbox such that we have the originated mailbox as listener mailbox, and a record for your default email 'from address' from platform config.

Define Case Priority base on Subject Line

Note: The priority of the case, before indexing, is set by the email listener.

To set the case priority based on words in subject line:

1. Go to **Administration** > **Lookup tables** > **ICM Data Model** > **SubjectPriorityLookups**.
2. Edit the tables and add keywords in the subject that will indicate priority:

a. Sort order – the “priority” of the word (which word is stronger).

b. Word – The word that should appear in the e-mail subject.

c. Priority – to which priority the case should be set in case this word exists in the subject.

Note: If the case has got priority according to the subject, it’s superior to the priority given by the config set, hence, it won’t be changed after the user selects sub type. The only option to change the priority is manually.

Defining Multi-language auto notification templates

Ops Manager offers multi-language support for email communication related to a case.

The email templates offer support, for sending email in the preferred language per inbox, or per manual creation, or body of the auto message.

- For inboxes, the language of each inbox is defined in mail routing config lookup.
- For manual creation, the field “preferred communication language” is used.
- Body of the auto message

When an auto mail is sent for the system, the system will look for,

1. The template that was defined for the config set (if no template is found, email will not be sent).
2. The communication language of the inbox.
3. The matching language of the template (if matching language is not found, the English version will be used).

Subject of auto message

The subject of auto email, in the system, will always be:

```
<case id><Subject in the matching language><Case subject>
```

When an auto mail is sent for the system, the system will:

1. Look for the subject that was defined for the communication language for the kind of email the system needs to send (Creation, pending closure or reject).
2. Look for the subject. If the subject in the preferred language is not found, the English version will be used. If there is no English, the email will not be sent.
3. Define subject for each communication language.

   a. Go to Administration > Lookup Tables > AutomatedEmailSubjects.

   b. Add 3 rows for each language (Creation, pending closure, and reject).
   - Type - Creation, pending closure or reject.
   - Subject – the subject for this type of email in the required language.
   - Language

Define settings for the QA Stage

Few parameters need to take into consideration for QA Phase,

1. The logic based on which the system will decide if the case should be sent to QA.
2. QA parameters (fields).
3. General setting (fail QA go to originator, audit is blocking).

Define the Logic – send to QA or not

The OOTB workflow will calculate whether a case should go to QA or not according to the "audit sample level" that is defined in the Platformconfig lookup. Based on this number the system randomly picks a number between 1-100. If the chosen number is less than or equal to the specified <audit sample level>, the case is sent for QA. If the audit sample specified is zero, no case goes to QA.

Based on client need, you may duplicate the OOTB workflow, save it with new name, and configure it with different QA logic. Then, paste the new workflow spaceguid in **AuditCalculatorWorkflowId** field in PlatformConfig lookup.

Create QA Forms

To create a view to hold the QA fields:

1. Create a new workflow.
2. Add Form activity.
3. Create your QC views that must have:
    a. Edit view
    b. Read only view

Tip: If there is more than one QC view, create a Host view that will hold the reference to all other views, and show them based on your logic. Set this view in the platformconfig.

Then:

1. Go to ICM Data Model > PlatformConfig.
2. Write the full path of your Edit QC view in "QA Edit View Path".
3. Write the full path of your Read only QC view in "QA Read Only View Path".

Disabling the Pass/Fail buttons according to some conditions

Use the following code in your QA forms, if you want to disable/enable the pass button based on some conditions:

```
var btnPC = $find($sq('[id$="cmdSubmitAction"][value="QA
Passed"]')[0].id)
        if(your condition for enable the button)
         btnPC.set_enabled(true);
```



```
else
btnPC.set_enabled(false);
```

Define QA General Settings

The below mentioned QA settings are made on the PlatformConfig lookup:

- AuditIsBlocking – check box, determines whether the case can continue to pending closure status in parallel to the QA task, or only after QA passed.
  - If blocking – in case of pending closure, and audit is needed, the status changes to "With QA". If QA pass, the status is "Pending closure", if QA fails, the status is "Audit Correction".
  - If not blocking – in case of pending closure, the status is "pending closure". The findings of the audit are not relevant to the closing of the case.
- FailedQAReturnsToOriginator – check box, determines whether the processor who initiated "Pending closure" gets the case back when QA fails or, the case will return to the whole team.

Add new process to Ops Manager Home

Ops Manager default new process is "manual case creation". To add other new process to the home page:

1. Go to Administration > Lookup Tables > ICM Data Model > OpsCenterNewProcessLinks.
2. Click **Add new record**. Fill in the following fields, and click **Save**.
   - Link Text: the display text of the process.
   - Query String: can be workflowID, or any parameter that you want to pass.
   - LinkId: the workflow space ID.
   - Image path: the source of the display icon image. We recommend to put the image here: *C:\Program Files\PNMsoft\Shared Resources\OpsCenter\images*. Then specify this path in the lookup: */Shared Resources/images/OpsCenter/x.png*.
   - Display order: the order in which you want the process to display in the process list.

Multi language support

To add a translation for the new process:

1. Go to Administration > Lookup Tables > ICM Data Model > OpsCenter Lookup Translations.
2. Click **Add new record**. Fill in the following fields, and click **Save**.
   - Source table name – NewProcessLinks
   - Source item ID – the fieldID from OpsCenterNewProcessLinks lookup
   - Language – the language you want to translate into
   - Translated Item Text – the text in the selected language

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Reports

OOTB Reports

Report Name	Parameters for Search	Query Description	Presented Columns
Aging of Open Tickets	• Team • From date • To date	Based on team, start date, and end date, will show all open cases (cases for which status is not: Rejected, Closed, Pending Closure & Closed as Spam).	Case ID, Case Subject, Request By, Open Date, Age, Requestor Email, Status, Target Date, Priority, Case Type, Country
Cases Closed Today	• Team	Based on team, will show all the cases that have been closed in the current date (statuses – Rejected, Closed, Pending Closure and Closed as Spam).	Case ID, Case Subject, Case Status, Open Date, Closed Date, Target Date, Priority, Closed By, Reason Text
Cases Origin	• Team • From date • To date	Will show the number of cases opened per channel.	Input Channel, Case Count
Cases Owner	• Team • Case ID	Will show the current owner of the selected case. (Excluding statuses Rejected, Closed, Pending Closure & Closed as Spam).	Current Owner
Case Resolved by Agent Against SLA	• Team • Agent	Based on team and agent\all agents, will show for each case if it met the SLA or not. Includes statuses Closed & Pending Closure	Agent, Team Name, Case ID, Case Subject, Requestor Email, Open Date, Closed Date, Target Date, Priority, Case Type, Country, In SLA?
Open Cases by Agent	• Team • Agent	Will show all the cases that are not in statuses – Closed, Rejected, Pending Closure or	Case ID, Agent, Case Subject, Status, Open Date, Priority, Case Type, Country

Report Name	Parameters for Search	Query Description	Presented Columns
		Closed as Spam per agent.	
Rejected Requests With Reasons	• Team • From date • To date	Based on the selected team and date range, the report will show all the rejected requests.	Case ID, Case Subject, Reason, Country, Rejected Date
Re open cases pending closure	• Team • From date • To date	Will show all the cases that were re-opened after the status was “pending closure”.	Case ID, Case Subject, Current Case Status, Requestor Name, Creation Date, Closed Date, Re Open Date
Requested on hold with reasons	• Team • From date • To date	Based on the selected team and date range, the report will show all the cases that are on hold.	Case ID, Case Subject, Reason, On Hold Date, On Hold Duration (Hours), Change to On Hold By
Search Case By Case ID	• Case ID	According to the entered Case ID, the report will show details regarding the Case.	Case ID , Case Subject, Requestor Email, Team, Assignee, Case Status, Open Date, Target Date, Priority, Category, Case Type, Case Sub Type, Country
Tickets per case types	• Team • From date • To date	Will show number of cases per sub type for all cases that have been opened within the selected date range.	Case Sub-Type, Case Count
Time from tickets creation to resolution	• Team • From date • To date	For all cases that have been closed within the selected date range, the report will calculate and present the time taken to close the case. Includes statuses Closed & Pending Closure	Case ID, Case Subject, Open Date, Closed Date, Priority, Time Difference
Total requests in date range	• Team • From date • To date	Will show all the requests present in the system for the specified	Case ID, Case Subject, Requestor Email, Team Name, Category, Case Status, Open Date, Closed Date, Target Date, Input Channel, Priority,

Report Name	Parameters for Search	Query Description	Presented Columns
	• Country	team within selected date range.	Case Type, Case Sub Type, Reason, Country

Create custom report

When creating new reports:

1. Create a new workflow.
2. Create Form and Data model.
3. Create your view (which is your report). If you want to use columns, use the grid.
4. Add this report to Reports in Ops Manager Flowtime under Administration.

Dashboards

OOTB Dashboards for Team Leader

List of Dashboards available to Team Leader:

Object name	Object details	Type of object/report
Total Number Of Cases	Total number of cases received within the selected date range.	Displays number
Daily Average Of Closed Cases	Provides the rate of case closure per day for all cases with "Closing" status (Closed, Pending Closure) that have been closed within the specified time range. *Calculation:* All cases with any of the "Closing" status divided by the total number of cases for the selected date range.	Displays number
Total Cases Sent to SME (Has a drill Report)	Number of cases that had "With SME" status within the selected date range.	Displays number
Current Open QA Tasks (Has a drill Report)	Number of all open QA Tasks.	Number
Current Pending Work by Hours to Target Date (Has a drill Report)	*Calculation*: Subtracts the target date of all cases within the selected date range that are not in "Closing" status from the current	Bar chart • Y-axis: Hours

Object name	Object details	Type of object/report
	date, and then distributes the result by an Overdue range (time to closure date): • More than 8 hours • In the next 4-8 hours • In the next 4 hours • In the next hour • Overdue • No due date	• X-axis: Number of cases
Overall SLA Compliance Measure (Has a drill Report)	For each case that have been closed or in pending closure status within the selected date range, compare between Target Date to the last time that case was in "Pending Closure" status. Excluding Rejected & Closed as Spam cases.	Pie chart displaying total count of cases for the team, divided to "Met SLA" & "Not Met SLA"
Number Of Closed Cases (Has a drill Report)	Pie that presents number of cases in the "Closing" status (Rejected, Closed, Pending Closure & Closed as Spam) that have been closed within the selected date range.	Pie Chart
Sending To SME By Team Member	Number of cases that have "with SME" status within the selected date range divided by the team member whom changed the case to "with SME" status.	Bar chart by Team Member
Current Team Members Open Cases Workload	Distribution of cases currently assigned to each Team Member.	Bar chart Shows the distribution of cases by Team Member. The chart also displays a bar for unassigned cases.
Accuracy Of Work By Team Member (Has a drill Report)	Take all cases that went to QA and divided how many pass QA and how many failed, per team member.	Stacked bar by team member (the one who sent the case to QA) - every bar divided by 2, "Pass" and "Fail"

Object name	Object details	Type of object/report
Cases by Status (Has a drill Report)	Distribution of all cases within the selected date range by their status.	Pie chart by status
Number Of Closed Cases By Team Members (Has a drill Report)	Distribution of cases with any of the "Closing" statuses (Rejected, Closed, Pending Closure & Closed as Spam) that have been closed within the selected date range divided by Team Member.	Multi Bar chart by Team Member Drill report presents all closed cases for the team member
Meeting SLA's by Team Member	For each case that have been closed or in pending closure status within the selected date range, compare between Target Date to the last time that case was in "Pending Closure" status. Excluding Rejected & Closed as Spam cases.	Stacked bar by team member - every bar divided by 2 "Met SLA" & "Not Met SLA"
Average SME Response Time By Minutes	Average Time between case status "With SME" to "SME Responded".	Bar graph divided by SME
Average Handling Time By Team Member By Hours	For each case that have been closed or in pending closure status within the selected date range, calculate the last date of pending closure status minus case creation date and divide by total of cases in "Closing" status within the selected dates. Excluding Rejected & Closed as Spam cases.	Bar chart divided by team member and their average case processing time
Team Members Measurements	For each Team Member displaying: Team Member Name, Number of closed cases within date range, average closure rate and percentage of meeting SLA. Displaying only members that closed at least one case. Excluding Rejected & Closed as Spam cases.	Grid

OOTB Dashboards for Operation Manager

List of Dashboards available to Operations Manager:

Object Name	Object Details	Type of object/report
Total Number Of Cases	Total number of cases received within the selected date range.	Displays number
Daily Average Of Closed Cases	Provides the rate of case closure per day for all cases, with "Closing" status (Closed, Pending Closure), that have been closed within the specified time range. *Calculation:* All cases with any of the "Closing" status, divided by the total number of cases for the selected date range.	Displays number
Total Cases Sent To SME (Has a drill Report)	Number of cases that had "With SME" status within the selected date range.	Displays number
Current Pending Work by Hours to Target Date (Has a drill Report)	*Calculation*: Subtracts the target date of all cases within the selected date range that are allocated to teams and are not in "Closing" status from the current date, and then distributes the results by an Overdue range (time to closure date): • More than 8 hours • In the next 4-8 hours • In the next 4 hours • In the next hour • Overdue • No due date	Bar chart • Y-axis: Hours • X-axis: Number of cases
Overall SLA Compliance Measure (Has a drill Report)	For each case that has been closed or in pending closure status within the selected date range, compare between Target Date to the last time that case was in "Pending Closure" status. Excluding Rejected & Closed as Spam cases.	Pie chart displaying total count of cases for all teams, divided to "Met SLA" & "Not Met SLA".

Object Name	Object Details	Type of object/report
Number Of Closed Cases (Has a drill Report)	Pie that presents number of cases in the "Closing" status (Rejected, Closed, Pending Closure & Closed as Spam) that have been closed within the selected date range.	Pie Chart
Accuracy Of Work By Team (Has a drill Report)	Take all cases that went to QA and divided how many pass QA and how many failed, per team.	Stacked bar by team. Each bar divided by count cases Pass & Fail.
Cases by Status (Has a drill Report)	Distribution of cases within the selected date range by their status.	Pie chart by status.
Current Teams Open Cases Workload	Distribution of cases currently assigned to each team.	Bar chart Shows the distribution of cases by teams. The chart also displays a bar for unallocated cases.
Average SME Response Time By Minutes	Average Time from status "With SME" to "SME Responded" status.	Bar graph divided by SME.
Average Handling Time By Team By Hours	For each case that have been closed or in pending closure status within the selected date range, calculate the last date of pending closure status minus case creation date and divide by total of cases in "Closing" status within the selected dates. Excluding Rejected & Closed as Spam cases.	Bar graph divided by team and its average case processing time.
Number of Closed Cases by Team (Has a drill Report)	Distribution of cases with any of the "Closing" statuses (Rejected, Closed, Pending Closure & Closed as Spam) that have been closed within the selected date range divided by Teams.	Bar chart by team Drill report presents all closed cases for the team.
Meeting SLA's By Team	For each case that have been closed or in pending closure status within the selected date range, compare between Target Date to the last time that case was in "Pending Closure"	Stacked bar by team - every bar divided by 2 "Met SLA" & "Not Met SLA".

Object Name	Object Details	Type of object/report
	status. Excluding Rejected & Closed as Spam cases.	
Current Open QA Tasks By Team (Has a drill Report)	Displaying the number of open tasks pending for QA audit, for each team.	Bar graph with all open tasks pending for QA audit, divided by team.
Team Measurements	For each team displaying: Team Name, Number of closed cases within date range, average closure rate, percentage of meeting SLA. Displaying only teams that closed at least one case. Excluding Rejected & Closed as Spam cases.	Grid

Customize the Dashboards

1. Create a copy of the Ops Manager Dashboard you want to customize.
2. Change the name of the container on the copy (any name).
3. Go to solution and choose container, and choose the “new container name”.

SQL Tables in Ops Manager

This table will show all the relevant tables that you need to know before modifying or creating new report/dashboard object:

Table	Description	Table Name
Cases Details Table	Current case status and more info.	UACT31fad8982d3446c79f83c3f7fbde3441
Closed Cases View	For each Closed or Pending Closure case, brings the close date and the user whom closed the case – Available from version 1.7.	vw_OpsCenter_BI_ClosedCases
Status History Log	For each case what is the statuses history – who changed the status and when.	UACT1eb8ce0f0566496c8be117f9e0f19d7b

Table	Description	Table Name
Statuses Table	Lookup table – Cases statuses codes and names.	UTCMB8230dbb471b54872b8beb67bdd7c463c
Category Table	Lookup table – Cases category codes and names.	UTCMBfb0df735ae3e4715a3c0b28953bb586e
Types Table	Lookup table – Cases type codes per category and type names.	UTCMB6d55c1086e1c4a3ba8a19a321c89f8bc
Sub Types Table	Lookup table – Cases sub types codes per type and sub type names.	UTCMBe96dd72769b049dcaee9c705acb96e2d
Priorities Table	Lookup table – Cases priorities code and names.	UTCMB327e788a1ee6456eba43bda317e3ac24
Case Audit Table	Audit details for each case.	UACTa79fc0da0d83440aaae1941a68959c0f
Tasks Table	Tasks details per case.	USLf197425dadd5446a95fab04374f91784_Tasks
Tasks Assigned To Employees	For each case, who are the employees working on it.	USLf197425dadd5446a95fab04374f91784_TaskEmployeeAssignments
Allocated Cases	For each case, to which group it has been allocated.	USLf197425dadd5446a95fab04374f91784_AllocatedCases
QA Table	Shows each case that has been sent to QA, and its results.	UACT9bd6705efa414c47b5f377bc31cfa019
Case Attachments Table	All attachments information per case.	UACT6e0fd6cfcb564f5bb9ed12bf15840bc7
Reasons Table	Reason codes and Reason text.	UTCMBdc32b2249b7f416bab328def86b3fd3f

Create Organization Address book

Ops Manager supports an address book that holds email Ids that are suggested to the user at the time of sending a new email from a case.

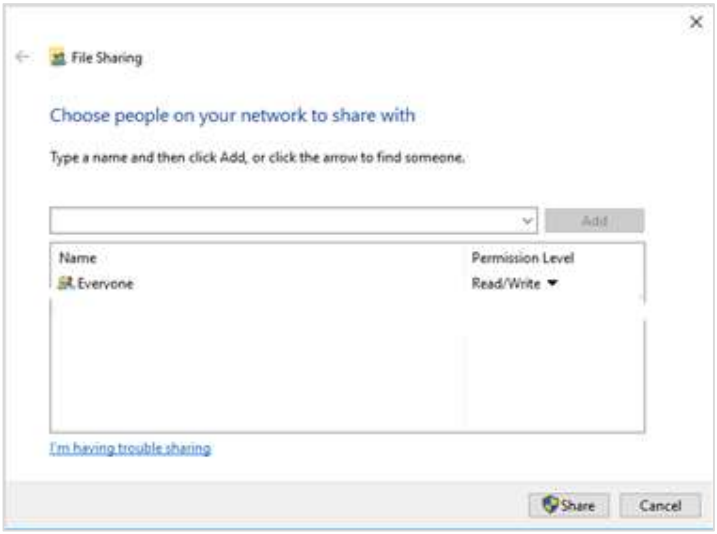
To create an address book in Ops Manager, enable the File Listener mechanism to update the address book table in database.

Before modifying the ICM File Listener workflow, do the following.

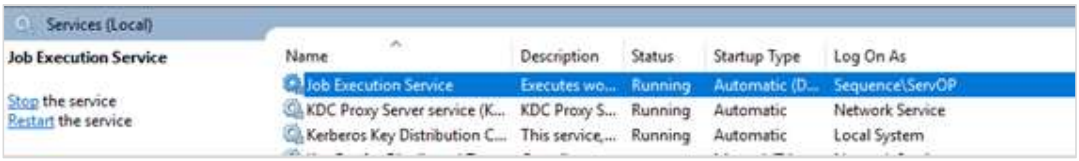
Create a network share folder

1. Create a new AddressBook folder in C drive.
2. To Share the folder, right click the AddressBook folder, and click **Properties**.
3. On the Sharing tab, click **Share**.

4. Select the people with whom you need to share the AddressBook folder.



Make sure you give “read” permissions to the user to run the Job Execution Service.



5. Click **Share**.
6. On the properties window, click **OK**.

Configure the File Connection

1. On Admin console, go to **Administration** > **Global Settings** > **File Connections**, and add new connection.
2. Choose Network Storage connection and fill in the fields.
   - Connection Name – AddressBookConnection.
   - Host – the name of the server (to check, go to This PC > Properties > Computer name).
   - Base Path – fill value only if the folder is not under \\C: drive.
   - Credential type – Application.
3. Click **Update**.

CSV File

1. Create a CSV file, and set comma (,) as the delimiter of the file.
2. Add the Header row columns (in this specific order):
   - EmployeeId
   - EmployeeName
   - EmailAddress
   - Active (True/False)

3. Save the file in the AddressBook folder that you have created previously.

Modify ICM File Listener

1. On Admin console, go to **Workflows** > **All Workflows**.
2. Create a copy of ICM File Listener workflow and give it a name.
3. Edit the File Listener Activity in the newly created workflow.
   a. Job Host – if needed, select the job host from the combo box.
   b. Select the job is enabled check box.
   c. Click **Next**.
   d. In advance option tab,
      - Repeat by select custom.
      - Set the time (recommend time – night time).
      - Set the frequency.
   e. Click **Finish**.

The File Listener process runs according to the previous setting, and updates the table according to the SVC file.

Excel Bulk upload

Ops Manager supports bulk upload, and has an example workflow that shows how it works.

You need to create your own upload workflow, and add error handling to the workflow before using it in production.

The file must be .csv.

The example workflow will open a form where the user will select category, type, sub type, and file.

Clicking on Submit will generate a case out of each row.

The example Excel template:

Country	Language	Requester name	Requester email address	Subject	Details	Target date (must be in dd/mm/yyy format)
United Kingdom	English	Person One	test@test.com	bulk 1	details of bulk 1	10/27/2018 12:30
France	French	Hector Boissieu	test@test.com	bulk 2	details of bulk 2	10/27/2018 13:00

Country	Language	Requester name	Requester email address	Subject	Details	Target date (must be in dd/mm/yyy format)
France	French	Person Two	test@test.com	bulk 3	details of bulk 2	10/28/2018 13:00

To create your own excel bulk upload:

1. Create a folder for the excel upload workflow. For example on C:\\
2. Give read and write permissions to specific user (recommend on system user).
3. Duplicate the workflow name which you need to in order to create your own workflow is “ICM Bulk Upload Example”.
4. Edit the “Save File To Server” Activity, and add the folder connection
    a. Name.
    b. Host – the server name.
    c. Base path – location of the folder.
    d. Credential type – choose store.
    e. Credentials – select from the existing or create new (name of the user that has access to the folder and its password).

Auto Assign for Individual in the team

The normal behavior of hot operation is that a case is showing in all the team member’s lists. However, if you want to use some logic to assign case to an individual you need to use this feature.

The system allows you to create auto assign process that will return in the end the User ID that should get the case. The OOTB auto assign logic will assign the case to the least busy person in the team.

If you want to use this logic, go to **PlatformConfig** (under ICM Data Model in Lookup tables):

1. Select the **Auto Assign Indexing** check box, if you want only specific user to do indexing.
2. Select the **Auto Assign Processing** check box, if you want only specific user to handle or process the case.

Note: If you do not want to use **Auto assign**, clear the two check boxes.

If you want to use your own logic for auto allocate:

1. Create a copy of “ICM Auto Assign Case” workflow.
2. Apply your logic in the Assign user ID activity, or add more activities.
3. Do not change or delete the Web service input activity.
4. Do not delete (but, you can change) the Web service output assigned.

5. Paste the workflow ID in the “auto assign indexing workspace id” or “auto assign processing workspace id” (in platformconfig lookup).

Note: If you use the auto assign, do not use “return to team” action in your set configuration action.

Fails to assign

In case the auto assign did not calculate user Id it may go either to all the team members, or to the unassigned queue. This depends on the definition in the *PlatformConfig*.

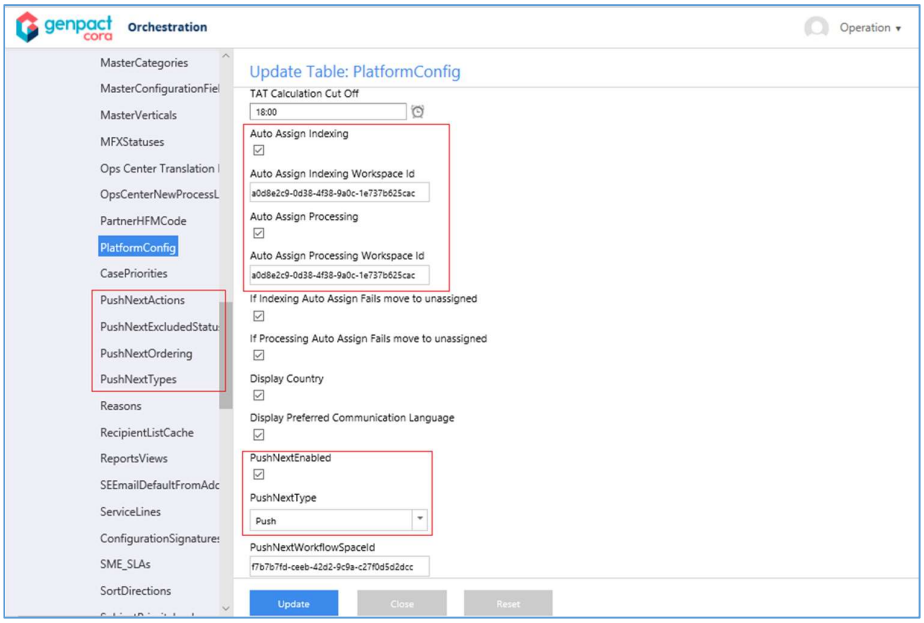
To send the case to unassigned queue in case of auto assign failure, select the “If indexing Auto Assign Fails move to unassigned” and “If Processing Auto Assign Fails move to unassigned” check boxes.

To send the case to all team members clear the check boxes.

Push Next configuration

Out-of-the-box push next logic takes the first case in the unassigned queue, and pushes it to the team member.

Before using this feature, make other configuration settings in Ops Manager on the left menu options shown in the image below.



Note: At the time of enabling Push Next functionality, make sure Auto Assign Indexing and Auto Assign Processing are also enabled in *PlatformConfig*, and that if auto assign fails the case moves to unassigned, that is because the “pushed” tasks are taken from the unassigned queue.

Important parameters for push next,

- Configure the sorting of the unassigned queue in *PushNextOrdering* (**Administration** > **Lookup Tables** > **ICM Data Model** > **PushNextOrdering**).

- Define action that will trigger the push next in *PushNextActions* (**Administration** > **Lookup Tables** > **ICM Data Model**).

  Note: We recommend including Pending Closure, On Hold, Send Email, and Send to SME actions.

- Define statuses that will exclude for Push Next (if the case is in these statuses it will not get pushed) in *PushNextExcludeStatus* (**Administration** > **Lookup Tables** > **ICM Data Model**).

Note: We recommend excluding Pending Closure, On Hold, Awaiting Response, and With QA status from Push Next.

Plug and play

There are few places in Ops Manager where developers can add workflow in between statuses in the case or even before the case is created.

To use these hooks, you must follow the instructions below

Create pre case execution workflow

Pre case hook allows the developer to add workflow even before the case is open.

This workflow could be fulfilment of some criteria to create a case, or some process to be followed before case creation, for example approval cycle. This workflow can be blocking and a case will not be created until a response is received from the workflow.

To create a workflow that holds the logic of the Pre Case Execution (all the activities that needs to be done before the case is open).

1. On Admin console, go to **Workflows** > **All workflows**.
2. Create a copy of **ICM PreCaseRequest** workflow without changing the Input and Output activities. In this copy workflow, you will create all the activities that you need to perform before the case is created.
3. On Admin console **Global Settings→ Application Variable** and update these app variables:

- **OPM.IsPreCaseRequestNeeded** – Value 0 or 1 to determine whether Pre Case execution is needed or not.
- **OPM.IsPreCaseBlocking** – Value 0 or 1 to determine whether Pre Case execution workflow will block the case until a response is received (1) or not (0). In case it is blocking, the case is not created until a response is received from the workflow. In case it is non-blocking, the case is created, and the activities in the workflow are performed in the background.

  Note: You must use blocking, if your answer depends on decisions that will be made during the workflow.

- **OPM.PreCaseWorkflow** – the Pre Case workflow spaceguid.

While in pre case execution workflow, the status of the case is Pre Case Creation, and the case is visible in Ops Manager case list only. As the case is not created yet so, it cannot be fetched and worked upon by any operator, and will not be shown in any dashboard or report in Ops Manager.

In the end, this workflow will return the following two values:

- Result–Yes or No
- Comment–string

If the result is Yes, the case is created, a notification is added to the case conversation tab, and a record is added to the audit log.

If the result is No, the case is NOT created, and the status changes to Reject From PreCase.

Create pre "Ready For Processing" workflow

Pre ready for processing hook allows the developers to add workflow before the case is ready for processing after indexing.

This workflow could be fulfilment of some criteria to open a case and start processing after indexing, or some process to be followed before sending the case for processing.

To create a workflow that holds the logic of the Pre Ready For Processing Execution (all the activities that needs to be done before the case is in ready for processing status).

1. On Admin console, go to **Workflows** > **All workflows**.
2. Create a copy of **ICM Pre Ready For Processing Request** workflow without changing the Input and Output activities.
3. On Admin console **Global Settings→ Application Variable** and update these app variables:

- **OPM.IsExecutePreReadyForProcessingWorkflow** – Value 0 or 1 to determine whether Pre Ready for Processing execution is needed or not. In case it is blocking, the case is not moved to ready for processing status until a response is received from the workflow. In case it is non-blocking, the case is moved to ready for processing status, and the activities in the workflow are performed in the background.
- **OPM.IsPreReadyForProcessingBlocking** – Value 0 or 1 to determine whether Pre Ready For Processing workflow will block the case until a response is received (1) or not (0).

  Note: You must use blocking, if your answer depends on decisions that will be made during the workflow.
- **OPM.PreReadyForProcessingWorkflowGuid** – the Pre Ready For Processing workflow spaceguid.

In the end, this workflow will return the following two values:

- Result–Yes or No
- Comment–string

If the result is Yes, the case status changes to Ready For Processing, a notification is added to the case conversation tab, and a record is added to the audit log.

If the result is No, the case is closed, and the status changes to Reject From PreCase.

Create pre case pending closure workflow

Pre pending closure hook allows developers to connect workflow before the case is moved to pending closure status.

This workflow could be fulfilment of some criteria to send the case to Pending Closure status, or some process to be followed before moving case to pending closure.

To create a workflow that hold the logic of Pre Pending Closure (all the activities that needs to be done before the case goes to Pending Closure status),

1. On the Admin console, go to **Workflows** > **All workflows**.
2. Create a copy of **ICM Pre Pending Closure Request** workflow without changing the Input and Output activities.
3. On Admin console **Global Settings→ Application Variable** and update these app variables:

- **OPM.IsExecutePrePendingClosureWorkflow** – Value 0 or 1 to determine whether case Pending Closure execution is needed or not.
- **OPM.IsPrePendingClosureBlocking** – Value 0 or 1 to determine whether pre Pending Closure workflow will block the case until a response is received (1) or not (0). In case it is blocking, the case is not moved to pending closure, and is not visible to Operators until a response is received from the workflow. In case it is non-blocking, the case is moved to pending closure status, and the activities in the workflow are performed in the background.

  Note: You must use blocking, if your answer depends on decisions that will be made during the workflow.
- **OPM.PrePendingClosureWorkflowGuid** – the Pre Pending Closure Execution workflow spaceguid.

  In the end, This workflow will return the following two values:

  - Result–Yes or No
  - Comment–string

  If the result is Yes, the case status changes to Pending Closure, a notification is added to the case conversation tab, and a record is added to the audit log.

Alerts

Alerts are email notifications related to a case, sent on fulfilment of certain conditions. These are not part of the product, but can be customized.

Note: For detailed information on Alerts, contact the product team.

Custom actions

Ops Manager allows power users to add customized actions as per need.

To add customized actions:

1. Create your new action workflow. Recommend to do it by duplicating one of the existing actions that can be found on Admin console, **Workflows** > **OpsCenter** > **Actions**.
2. If you want to create dialog box for this action, go to **ICM Forms** > **ICM Case Dialog**, and duplicate one of the views there.

3. Go to **Administration** > **Lookup Tables** > **ICM Data Model** > **Actions**, and add your new action, specify the workspace ID of that action. Select the check box if you want to make this action visible in config set actions tab.

Note: We recommend consulting the product team before implementing new action in your project.

Config file (grid columns customization)

The config files of “Team Member”, “Team Leader”, and “Operation Manager” have default columns that are displayed in the grid. You can add or remove columns. Keep in mind –you need to do this change every time you upgrade Ops Manager.

Portal menu

The default portal menu of Ops Manager arrives with Sequence and Ops Manager. If your organization use only Ops Manager, you may remove the Sequence items from the menu.

To remove Sequence,

1. Go to C:\Program Files\PNMsoft\Shared Resources\Components\Flowtime\Config\Portal\Commands.
2. Edit the OpsCenter.xml to comment the following tags:

```
<MenuItem Id="OpsCenterSequence" Command="OpsCenterSequenceCommand"
Text="Sequence" Tooltip="Sequence" ></MenuItem>
```

3. Make Ops Manager as default page:
    a. Go to C:\inetpub\wwwroot\Flowtime.
    b. Edit Web.config file.
    c. Search for <defaultDocument>.
    d. Remove or comment all related lines, and leave this line: <add value="Default.aspx" /> uncommented.
    e. Go to IIS > SeqWeb.
    f. Click Content view tab.
    g. Right click Default.aspx.
    h. Select Switch to feature View.
    i. Click default.aspx that appears under Seqweb.
    j. Double click Http Redirect.
    k. Select Redirect requests to this destination check box, and add /OpsCenter/Default.apsx in the field.
    l. In Set Status Code, select “Permanent Redirect (308)”.
    m. Click **Apply**, on the right side menu.
    n. Reset IIS.

Remove new request button from the case

If your organization doesn't want to use the new request feature follow these steps:

1. Hide new request in the case:
   a. Create a view call hideNewRequest (in customizable views > Client Properties Views).
   b. Add this code to the view:

```
<script>
 Sys.Application.add_load(hideNewRequestButton);
 function hideNewRequestButton()
  {
    var nrBtn = $findByControlId("btnNewRequest");
    if(nrBtn)
    {
                nrBtn.set_visible(false);
    }
 }
 </script>
```

   c. Add the following to the bottom of all other views in this form:

```
<sq8:SubView runat="server" ID="svHideNR"
VirtualPath="hideNewRequest.ascx"></sq8:SubView>
```

2. Hide "My Task" menu item (because you don't use new request, tasks in sequence will not be created):
   a. Go to C:\Program Files\PNMsoft\Shared Resources\Components\Flowtime\Config\Portal\Commands.
   b. Edit the OpsCenter.xml.
   c. Comment these tags:

```
<MenuItem Id="OpsCenterMyTasks" Command="OpsCenterMyTasksCommand"
Text="{$resources.MyTasks}" Tooltip="{$resources.MyTasks}"
CssClass="sqpt-aggregation-tasks"></MenuItem>
```