



Cora Sequence  
Ops Manager –  
All you need to  
know –  
From an end  
user standpoint



## Purpose of the Document

This document gives information on the front-end part of Ops Manager.

## Document Details

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## Contents

Flowtime - The Portal.....	5
SeQuence .....	5
Ops Manager home .....	5
Manual case creation.....	5
Manage cases (as Team Member) .....	5
Manage cases (as Team Leader) .....	6
Dashboard .....	7
Work assignment .....	7
Task list.....	8
Manage cases (as Operations Manager) .....	9
Dashboard .....	9
Work allocation.....	10
Case list .....	10
My tasks .....	11
Processes I Started .....	12
Reports.....	12
Case .....	12
Case sections.....	12
Details .....	12
Properties.....	13
Case tabs .....	14
Conversations .....	14
Audit log.....	15
Attachments.....	15
Linked cases .....	15
System actions .....	15
New request.....	15
New comment.....	16



New email .....	16
Actions .....	16
Case closing .....	16

## Flowtime - The Portal

Flowtime is the portal where the actual work is done.

Below are the components that you will see when you log in to Flowtime:

- SeQUENCE
- Ops Manager
  - Ops Manager Home
  - My Tasks
  - Processes I Started
  - Reports
  - Ops Manager Admin (only Power users will be able to see its content)

**Note:** This is a general description, based on your implementation you can see less items (for example, if your organization uses only Ops Manager you won't see SeQUENCE part)

## SEQUENCE

Navigates to other SeQUENCE parts, which are not part of Ops Manager.

## Ops Manager home

On this page, you can either select a role, and go to your case or task list, or start a new process like manual case creation.

**Note:** As default, you will see only "Manual Case Creation", but per the implementation, other new processes may appear here.

## Manual case creation

1. Click **Start Process** on **Manual Case Creation** tile. A new case window appears on different tab of the browser.
2. Add the basic mandatory case details, and click **Submit**.

## Manage cases (as Team Member)

On this page, appears all the cases that you as a Team Member should work upon.

The grid is divided into 3 sections:

- **Assigned to Me:** shows all tasks I can work upon.
- **In Progress:** tasks fetched by me.
- **Completed:** case tasks already completed by me. For example, if a new case comes in, and I did indexing task, this task will be presented in completed tab, and I will see the case number in Assigned to Me tab, as now I have to work on the case.

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

- Envelope for new case and new email: The envelope with a red dot (ON or Unread) is displayed whenever a new case is created or a new email is received for a case. Opening the case turns off the envelope (mark as read). You can also click the envelope to turn it OFF or ON without opening the case. An email marked as read by one user is displayed as read for all the users.
- Case ID
- Priority
- Target Date
- Created
- From
- Subject
- Case Status
- Case Category
- Case Type
- Case Sub Type
- Country

You can sort and apply multiple filters on the grid columns. Following are the columns on which you can select more than one filter criteria:

- Importance (Flag)
- Priority
- Case Status
- Case Category
- Case Type
- Case Sub Type
- Country

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

- Fetch Tasks
- Return Tasks
- Close As Spam

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

- Open And Fetch
- Open
- Fetch Task
- Close As Spam
- View Message – will show you the last case message preview.

## Manage cases (as Team Leader)

When you log in as a team leader, the default page you will see is the Dashboard.

There are three tabs available:

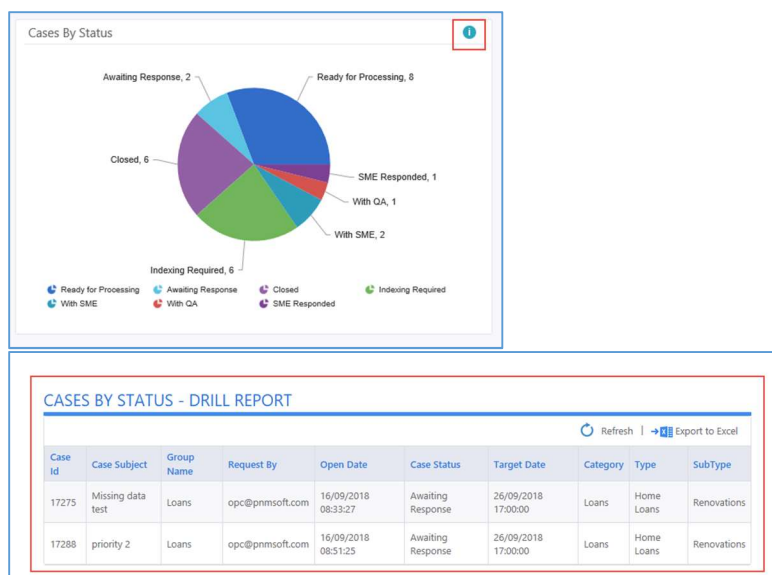
- Dashboard
- Work Assignment
- Tasks List

## Dashboard

All dashboard objects are being filtered by the Start Date, End Date & Team filters except those with “Current” in their titles (which not filtered by dates). Default date range is the current month.

Some of the objects have drill down report. When you hover on the “i” icon next to the object (as shown in the screenshots below), the tooltip info gives the description of the object, and mentions if the object has drill down report or not.

In order to access drill down report, click on the relevant section, and the drill down report will open in a new tab/window.



## Work assignment

On this tab, the team leader is able to see all the cases allocated to his team. Each section will show the cases that are assigned to the respective operator, and one unassigned queue for cases that are not assigned to any of the team member.

For each case, you can see the Subject, Case Status, and Case ID.

You can drag and drop cases from one operator to another as long the background of the case is white.

**Note:** If the case background is grey, means that some operator already fetched it, if the background is white, means that the case is not fetched yet.

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

- Reassign Task to Employee – to assign the case to a team member.
- Reset Assignment – to return case to all the associates in team
- Close As Spam – to close the case.
- Open – to open the case.
- Return Task – will take the case from the employee and return it the whole team.

## Task list

On this page, appears all the cases that allocated to your team(s).

In the “Team” drop down you may select the team(s) that you want to see.

The grid is divided into five sections:

- **Open:** shows all tasks that are open in the selected team(s).
- **Assigned:** shows all tasks that are assigned to specific user in the selected team(s).
- **Unassigned:** shows all tasks that are unassigned to specific user in the selected team(s).
- **In Progress:** shows all tasks that fetched by specific user in the selected team(s).
- **Completed:** shows all tasks that already completed by your team. For example, if a new case comes in and a member of your team did indexing task, this task will be presented in completed tab, and will be presented in Open tab, as now the team have to work on the case.

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

- Envelope for new case and new email: The envelope with a red dot (ON or Unread) is displayed whenever a new case is created or a new email is received for a case. Opening the case turns off the envelope (mark as read). You can also click the envelope to turn it OFF or ON without opening the case. An email marked as read by one user is displayed as read for all the users.
- Case ID
- Priority
- Target Date
- Created
- From
- Subject
- Case Status
- Case Category
- Case Type
- Case Sub Type
- Country
- Assigned

You can sort and apply multiple filters on the grid columns. Following are the columns on which you can select more than one filter criteria:

- Importance (Flag)
- Priority



- Case Status
- Case Category
- Case Type
- Case Sub Type
- Country

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

- Reassign Task to Role
- Reassign Task to Employee
- Reset Assignments
- Return Task
- Close As Spam

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

- Return Task
- Open
- View Message: will show you the last case message preview.

## Manage cases (as Operations Manager)

When you log in as an operation manager, the default page you will see is the Dashboard.

There are three tabs available:

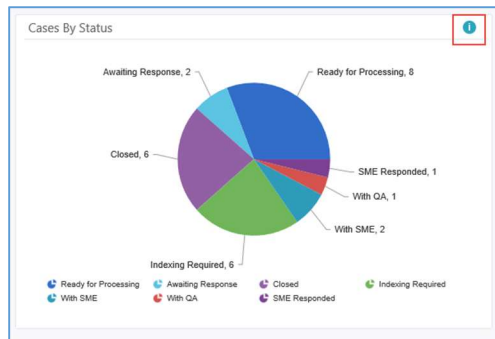
- Dashboard
- Work Allocation
- Case List

## Dashboard

All dashboard objects are being filtered by the Start Date, End Date & Team filters except those with “Current” in their titles (which not filtered by dates). Default date range is the current month.

Some of the objects have drill down report. When you hover on the “i” icon next to the object (as shown in the screenshots below), the tooltip info gives the description of the object, and mentions if the object has drill down report or not.

In order to access the drill-down report, click on the relevant section, and the drill-down report will open in a new tab/window.



CASES BY STATUS - DRILL REPORT

Refresh | Export to Excel

Case Id	Case Subject	Group Name	Request By	Open Date	Case Status	Target Date	Category	Type	SubType
17275	Missing data test	Loans	opc@pnmsoft.com	16/09/2018 08:33:27	Awaiting Response	26/09/2018 17:00:00	Loans	Home Loans	Renovations
17288	priority 2	Loans	opc@pnmsoft.com	16/09/2018 08:51:25	Awaiting Response	26/09/2018 17:00:00	Loans	Home Loans	Renovations

## Work allocation

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

For each case, the Subject, Case Status, and Case ID is shown.

Click the ellipsis (...) against a case to display context menu with the following options:

- **Reallocate:** to allocate the case to a team.
- **Open:** to open the case.

## Case list

This tab displays lists of all the cases in Ops Manager.

The grid is divided into five sections:

- **Open:** shows all tasks that are open in Ops Manager.
- **Allocated:** shows all tasks that are allocated to specific team(s).
- **Unallocated:** shows all tasks that are unassigned to specific user in the selected team(s).
- **In Progress:** shows all tasks fetched by specific team(s).
- **Completed:** shows all tasks already completed by team(s). For example, if a new case comes in and a member of your team did indexing task, this task will be presented in completed tab, and will be presented in Open tab, as now the team have to work on the case.

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

- **Envelope for new case and new email:** The envelope with a red dot (ON or Unread) is displayed whenever a new case is created or a new email is received for a case. Opening the case turns off the

envelope (mark as read). You can also click the envelope to turn it OFF or ON without opening the case. An email marked as read by one user is displayed as read for all the users.

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

You can sort and apply multiple filters on the grid columns. Following are the columns on which you can select more than one filter criteria check box to apply multiple filters:

- Importance (Flag)
- Priority
- Case Status
- Team
- Case Category
- Case Type
- Case Sub Type
- Country

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

- Reallocate
- Close As Spam

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

- Reallocate
- Open
- Close As Spam
- View Message: will show you the last case message preview.

## My tasks

Displays the list of any tasks that are related to cases. These tasks are not cases by themselves.

## Processes | Started

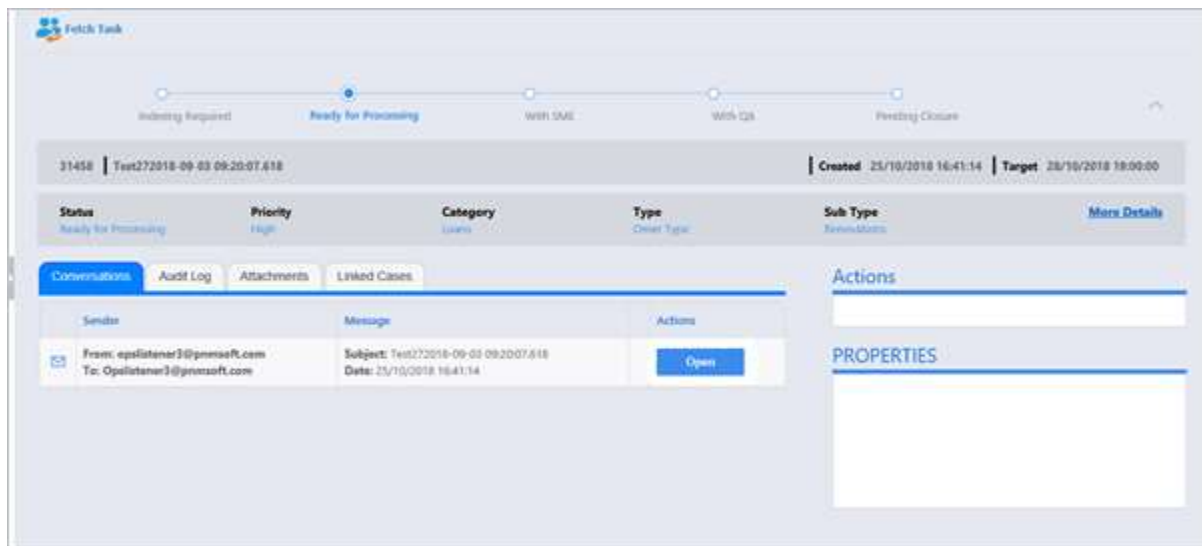
Displays the list of cases created by user.

## Reports

Displays the reports in Ops Manager as per the role selection made by user.

Select a report from drop-down list. Fill in the relevant parameters based on which the report is fetched, and click Search. The result is displayed in a table, which the user can export to excel.

## Case



## Case sections

A case details page is divided into various sections, which are explained here.

## Details

The details section present all the meta data of the case. These are the fields:

Field	Description
Case ID	The unique ID for Case.
Subject	The subject of the email/the manual case.
Created	The date of creation of Case.

Field	Description
Target	The Case target date. Calculated according to the TAT.
Status	Status of the Case. Generated by the system.
Priority	The priority of the Case.
Category	The Case category.
Case type	The Case type.
Case sub type	The Case sub type.
Reason	Displays the last reason selected while performing actions on the case.
Requester name	Name of the one who requested the case. Comes from the “from” email or from the field when creating manually.
Updated at (system field)	The last updated date and hour.
Input Source	Could be: <ul style="list-style-type: none"> <li>• Manual</li> <li>• Mail</li> <li>• Bulk</li> <li>• Webform</li> </ul>
Country (will be presented or not – depend on your organization setting)	The name of the country where the case is requested.
Team (will be presented or not – depend on your organization setting)	The team that associate with the case.
Case Communication Email	The email selected for case related email communications.

**Note:** The processor may edit these fields anytime except when the case status is QA.

## Properties

The properties section present all the business fields that belong to the case’s config set. The presented fields may be different from case to case.

## Case tabs

The case details page displays some information on different tabs explained below.

### Conversations

On this tab, all the Correspondence of the case is displayed. It displays all the emails sent or received in relation to the case and comments that relegated to the case.

The details displayed on the screen are:

Name	Description
Icon	<p>Depicts the type of conversation in the row.</p> <p>Commonly displayed icons are:</p> <ul style="list-style-type: none"> <li>• Email: When a case is created through mail.</li> <li>• Question: When a case query is sent to SME.</li> <li>• Answer: When a case query is answered by the SME.</li> <li>• QA Pass: When a case passes QA.</li> <li>• QA Fail: When a case fails QA.</li> <li>• Comments: When a comment is added to a case.</li> <li>• Bell: Notification from the system.</li> </ul>
Sender	From whom and to whom.
Message	Subject, message preview and sent date.
Actions	<p>The actions performed on the case.</p> <p>For each message the processor can:</p> <ul style="list-style-type: none"> <li>• Open – will show the message.</li> <li>• Reply – pressing on this button will open “Reply Message” where the processor can enter all the details. Pressing on “choose template...” will open a pop up where the processor will be able to select which template to use. The processor can save the response as draft or send the message.</li> <li>• Reply All – Same as reply with all the original recipients in the respective fields (TO, CC)</li> <li>• Forward – same as “reply”, but the processor must enter value in “to”. In order to forward the message.</li> </ul>

## Audit log

This tab specifies the history of the case. The Activity, Date on which activity is performed, User Name, and Comments, if any.

## Attachments

This tab lists all the attachments related to the case. For a case created through email, any attachments included in the original email are listed here. This tab also displays the original email attached automatically as a \*.msg to the Case, if your project is customized to support this feature.

The supported file types for attachment are:

\*.bpm, \*.csv, \*.doc, \*.docx, \*.gif, \*.jpg, \*.png, \*.ods, \*.odt, \*.pdf, \*.ppt, \*.pptx, \*.rtf, \*.tif, \*.txt, \*.xls, \*.xlsx, \*.xps, \*.zip. You can attach to a case any files with these extensions.

The system also supports adding multiple attachments in one go by selecting more than one attachments using ctrl and click.

## Linked cases

This tab displays the cases linked to the selected case. It has another section Linked Child Cases.

On clicking “Link to Parent Case”, a pop up window appears where the user may search for specific cases, and link them to the selected case.

Automated links are created when a new email comes in with the subject [Case: <ID>], and if the ID exists with Closed status then a new case is created, and both cases are linked together.

## System actions

### New request

Click “New Request” to open a pop up window, and enter the following:

Field	Description
To	The team to send the request to.
Subject	Add subject to the request.
Reason	Reasons that were defined for the specific status, and the action request.
Attachments	Attachments to the request, if any.
Body	Details of the request.

After clicking on “Send Request” the system will generate a request task to the selected team, and the status of the case will change to “Internal Request”.

**Note:** New request button maybe hidden in your Operation.

### New comment

Click “New Comment” to open a window with rich text editor to add comments. These comments appear on the Conversations tab.

### New email

Click “New Email” to open a window, and enter the following:

Field	Description
To	Mail ID of the recipient of the mail.
Reason	Reason for which the mail is being sent.
Subject	Subject of the mail.
Attachment	Attachments to the mail, if any.
Body	Mail body, the content of the mail.
Choose template	Here you can select a template, which will populate in the body section. Use template when you want to ease your work.

### Actions

The available actions in this section are based on pre-defined configuration. For each status and config set different actions may appear.

### Case closing

Case is closed automatically when the case status is “Pending closure”, and no response or related email is sent in the next N number of days (this is configurable).