



# **Merative Social Program Management 8.1**

**Supervisor Workspace Guide**



## Note

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Before using this information and the product it supports, read the information in [Notices on page 37](#)



# Edition

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This edition applies to Merative™ Social Program Management 8.0.0, 8.0.1, 8.0.2, 8.0.3, and 8.1.

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# 1 Cúram Supervisor Workspace Guide

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The Supervisor Workspace helps supervisors monitor and manage the workloads of the users, organization units, and work queues that they supervise. Case and tasks can be assigned to users within the system by supervisors.

## 1.1 Introduction

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### Purpose

This guide is intended to provide a business overview of the Cúram Supervisor Workspace. The Cúram Supervisor Workspace is designed to help supervisors monitor and manage the workloads of the users, organization units and work queues that they supervise. After reading this guide, the reader should understand how a supervisor can use the workspace to monitor and manage the work load of subordinate users through case and task assignment.

In order to best understand this application, the guide should first be read in full. The guide is not intended to be used as a training manual or user guide.

### Audience

This guide is intended for business analysts employed by the organization. The audience should have a strong knowledge of the organization's business requirements. A basic knowledge of the application is also assumed.

### Prerequisites

The reader should be familiar with the basic concepts of Social Enterprise Management (SEM). The reader should also understand how supervisors in the organization manage work load balancing through case and task assignment.

To best understand the topics covered in this guide it would be helpful to have read the *Cúram Workflow Overview*, the *Merative SPM Integrated Case Management Guide*, the *Cúram Participant Guide*, and the *Cúram Organization Administration Guide*.

### Chapters in this Guide

The following list describes the chapters in this guide:

- **The Supervisor Workspace and Role**

This chapter provides an overview of the Cúram Supervisor Workspace, and information on the role of the supervisor in the organization.

- **Using the Supervisor Workspace to Manage Work**  
This chapter discusses the Supervisor Workspace. The principles of work management and the general task functionality available in the application are outlined, and task and user searches, which are used in all workspaces, are explained.
- **Managing Work for Cases**  
This chapter outlines the case work management functions available to the supervisor, including case reassignment.
- **Cases With Issues**  
This chapter outlines the functionality designed to assist supervisors in viewing cases with associated issues.
- **Cases With Appeals**  
This chapter is only relevant if the organization has the Appeals module installed. This chapter outlines the additional functionality designed to assist supervisors in viewing cases with associated appeal cases.
- **Managing Work for Users**  
This chapter outlines the user focused work management functions available to the supervisor, such as case and task assignment, and management of the user settings.
- **Managing Work for Organization Units**  
This chapter outlines the organization unit work management functions available to the supervisor. It covers how the organization hierarchy is used to manage work.
- **Managing Work for Work Queues**  
This chapter outlines the work queue work management functions available to the supervisor, including work queue subscription, and work queue task assignment and reservation.
- **Supervisor Workspace Customization Points**  
This chapters describes the customization points offered in Supervisor Workspace application.

## ***1.2 The Supervisor Workspace and Role***

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### **Introduction**

The Cúram Supervisor Workspace is designed to help supervisors monitor and manage work assigned to users, organization units, and work queues that they oversee. The application supports the supervisor in managing workload balancing by enabling case and task assignment within the system.

### **The Meaning of Work Supervision**

Work supervision is a process focused on moving cases and tasks through their life cycle more efficiently by actively managing the task and case load of organization objects. Workload balancing is achieved through case and task distribution in order to ensure timely completion of work.

### **The Cúram Supervisor Workspace**

The Cúram Supervisor Workspace allows supervisors to manage case and task workloads the organization objects that report to them. Much of the functionality provided for managing

cases, users, organization units and work queues is based upon task actions. Graphs and lists aid supervisors in assigning cases and task so that they can be administered more effectively.

## The Supervisor Role

The supervisor role is designed for work supervision and has access to the Cúram Supervisor Workspace and its workload management functionality. This role is assigned to a user at administration level. The supervisor account is used for workload management rather than casework. When a supervisor logs-in, the Supervisor Workspace is displayed.

### ***1.3 Using the Supervisor Workspace to Manage Work***

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#### Introduction

The Cúram Supervisor Workspace helps the supervisor direct tasks and cases to the best equipped user or group. Focused views of cases and tasks enable the supervisor to prioritize the work that has approaching deadlines. The Supervisor Workspace functions as a portal to these views. From the Supervisor Workspace, the supervisor can choose a particular focus, for example, all cases with issues, or the current tasks of a specific user.

#### The Supervisor Workspace

On log-in, the supervisor is presented with the Supervisor Workspace, which makes a number of alternative workspaces accessible from the navigation bar.

A list of all the users who report to the supervisor is displayed by default. This includes:

- All users in any organization unit that the supervisor holds a lead position for.
- All users in any child units of any organization unit that the supervisor holds a lead position for.
- All users who hold a position that reports directly or indirectly to the supervisor's position.

The supervisor's calendar and shortcuts are also displayed.

If the supervisor does not hold a lead position in an organization unit, the list will contain only users whose positions report directly to the supervisor's position.

The alternative views available are:

- A list of users who hold a position within the supervisor's organization units and users who hold a position that either directly or indirectly reports to a position currently held by the supervisor.
- A list of cases that are owned by users who reports to the supervisor, owned by the supervisor, or supervised by the supervisor.
- A list of the organization units that the supervisor holds a lead position in, and their child units if the organization has decided to include them in this view.
- A list of the work queues to which the supervisor's users are subscribed.

Views are also provided for Cases With Issues, and Cases With Appeals if the Appeals module is installed.

The purpose of each of these lists is to provide overview information and a link to each of the individual workspaces. For example, on the users view, a View link beside each record leads the supervisor to the User Workspace for that user.

The information displayed for each list is:

- **Case Lists**  
Reference Number, Product, Primary Client, Start Date, Status.
- **User List**  
Name, Number of Open Cases, Number of Reserved Tasks, Number of Assigned Tasks.
- **Organization Unit List**  
Name, Status, Date Created.
- **Work Queue List**  
Name, Number of Tasks in Work Queue.

## Task Functionality Available to the Supervisor

For all types of work management, knowledge of the task life cycle is the key to effectively manipulate tasks in order to balance workloads.

### ***Viewing Tasks Using Workspaces***

The supervisor has a number of different workspaces available to aid in assessing the workload of individuals or groups. Workspaces provide both at-a-glance overviews and more detailed lists such as a view of all tasks due on a particular day. Each workspace enables the supervisor to focus on particular tasks. For example, the supervisor might want to assess a user's workload for this week, and will therefore view all tasks reserved by the user that are due in the next week. These focused views aid the supervisor in assessing workloads and can highlight priority tasks that should be completed urgently. Drilling down from workspaces gives more detailed information, enabling the supervisor to reassign cases and tasks, and to monitor the progress in detail.

The workspaces provided are:

- Case Workspace
- User Workspace
- Organization Unit Workspace
- Work Queue Workspace

### **Viewing Tasks By Month or By Week**

The graphs on the initial view of each workspace show all related reserved and assigned tasks for which the task deadline date falls within the current calendar week, or the current calendar month starting from the current week. These tasks are displayed in a horizontal bar chart, each bar split into the assigned and reserved tasks due on that day or week. If the view is set to show the current week, the task load for each day is displayed; if viewing a month, they appear for each week. The application administrator can configure the weekly view to display tasks for 5 days or 7 days.

### **Viewing Assigned Tasks**

Each workspace allows the supervisor to view the assigned tasks for the case, user, organization unit, or work queue. The supervisor can access the individual task details page, reserve a task to a user, or reserve multiple tasks to a user.

## **Viewing Reserved Tasks**

For the Case, Organization Unit and Work Queue Workspaces the list of reserved tasks is initially displayed as a horizontal bar chart with each bar split into open tasks and deferred tasks. From this chart the supervisor can drill down to a list of open tasks and a list of deferred tasks. From the task list pages the supervisor can drill down again to individual task pages.

The user workspace does not use the bar chart of reserved tasks, but instead offers direct links to the open tasks list and the deferred tasks list. From these lists the supervisor can choose to forward task to another user, or reallocate them.

## ***Task Details Page***

The Task Details page can be accessed from any page in the application where a task is listed. This page allows the supervisor to manage an individual task, as it includes supervisor versions of the standard task management functions, which are forward, reallocate, reserve, unreserve, defer, restart, add a comment and close. It also displays both the task header details, and the complete task history. The events of the task history are displayed in reverse chronological order from the most recent to the earliest.

## ***Reserving Tasks***

The supervisor can reserve a task for a user. A reserved task can only be undertaken by the user who has the task reserved. This gives the supervisor the ability to redistribute that user's tasks if he or she feels that a user is overloaded or behind on their work. Conversely, tasks can be reserved to a user who has a lighter workload than their co-workers.

## ***Unreserving Tasks***

Reserved tasks can be unreserved by supervisors in order to make them available again to any users or work queues to which it was previously assigned before reservation.

## ***Deferring Tasks***

The supervisor can specify that a reserved task should be deferred until a later date. The deferred task is still reserved to the user, but is now on their deferred tasks list. The task can be scheduled for automatic restart, which means that the system will automatically set the task status from deferred to open on a date specified by the supervisor. The task will be displayed in the user's Reserved Tasks list page.

## ***Restarting Tasks***

A deferred task may also be restarted manually by the supervisor. Tasks must be deferred or reserved before they can be re-started.

## ***Forwarding Tasks to Alternative Targets***

A reserved or assigned task can be forwarded by the supervisor to a job, position, organization unit, user or work queue. If the task is reserved, it is first un-reserved, thereby making it available to the organization object that it is forwarded to. Closed tasks cannot be forwarded.

## ***Reallocating Tasks***

Reallocation of a task invokes the task's initial allocation strategy. This results in the task being reassigned to the item (group of users or work queue) to which it was originally assigned by the system. It should be noted that this is a different action from un-reserving a task. Unreserving a

task assigns the task to the last group it was assigned to before being reserved. Reallocating a task uses the initial task allocation strategy, which will usually assign the task to the first group it was assigned to, if no changes have been made to the allocation strategy or groups in the mean time.

### ***Closing Tasks***

Tasks that have been created by a user can be closed by the supervisor. System created tasks may not be closed in this manner, but are closed automatically by the system after the action associated with the task has been undertaken.

## **Finding Tasks and Users**

In situations where details are required for a specific task or user, the User Search and Task Search functionality can be used to find a user or a task. The supervisor may want to search for a user to assign a task or case to. This functionality is available via the user select tool which enables the supervisor to assign tasks to users across the organization.

### ***Task Search***

The task search enables the supervisor to search for a task using the task ID, the case reference number or the participant name. The search returns a list of tasks meeting the search criteria, and the task details page for each task can be accessed from the list.

### ***User Search***

The User Search allows the supervisor to search for any user in the system by first name, last name, organization unit or job. The search returns a user or a list of users that match the search criteria, and the User Workspace for each user be then be accessed from the list.

### ***User Selection***

The User Select allows the supervisor to search for and select any user in the system by first name, last name, organization unit or job. The user select functionality is typically used in the context of task or case assignment, reservation or forwarding.

## **Bulk Reassignment of Work**

During the course of workload management, a supervisor may need to reassign cases or forward tasks in bulk for a particular user. For example, if a user has unplanned leave (e.g. is sick) and their work needs to be distributed amongst other team members. The Supervisor Workspace provides actions to reassign cases and forward tasks in bulk. For system performance reasons, these actions are not performed online by the system, they are performed either in deferred process or in batch, depending on the number of items selected. The threshold value when bulk reassignment should be performed in batch mode is a configurable parameter and therefore can be set based on a customer system configuration. When the number of items selected is less than or equal to the threshold value, the bulk reassignment is performed in a deferred process. When the number of items selected exceeds the threshold value, the bulk reassignment is performed in a batch process. This threshold value is made visible to a supervisor, to allow them to make informed decisions when performing bulk reassignment.

Where a case is scheduled for later reassignment, neither the system will present it in the list for bulk reassignment again nor can it be reassigned online by a caseworker until the initial reassignment is complete. Likewise, where a task is scheduled for later forwarding, neither the

system will present it in the list for bulk task forwarding again nor can it be forwarded online by a caseworker until the initial task forward is complete.

### **Bulk Case Reassignment**

The Bulk Case re-assignment feature is redesigned to ensure that it is performant by making use of deferred processing and batch processing methodologies.

A new environment property

`"curam.batch.bulkcasereassignment.deferredprocess.max.processing.count"` has been introduced and it defaults to a value of `100`. This value can then be modified by an organization to meet their specific processing requirements. Based on the value of the property, the application will either choose deferred processing of case re-assignments or will queue the cases for batch processing.

- **Execution flow**

Bulk Case re-assignment flow when the number of cases are lesser than or equal to maximum processing count property value:

- User chose to re-assign a set of cases.
- Based on the number of cases selected for re-assignment, this value is compared with the value set for the property `"curam.batch.bulkcasereassignment.deferredprocess.max.processing.count"`
- When the cases chosen are lesser than or equal to the maximum processing count property, then the re-assignment will be executed as a deferred process .
- The following informational message will be displayed to the user on the user interface, "The selected cases are currently being reassigned and a notification will be sent to your Inbox once this completes".
- During deferred processing, all the cases chosen will be re-assigned on success or all the cases will be rolled back on failure due to some business logic validation failure or application exceptions.
- Both the current owner and the new owner will be informed by means of a notification.

Case re-assignment flow when the numbers of cases are greater than the maximum processing count property value.

- User chooses to re-assign a set of cases .
- Based on the number of cases selected for re-assignment, this value is compared with the value set for the property, `"curam.batch.bulkcasereassignment.deferredprocess.max.processing.count"`
- When the cases chosen are greater than this value, these cases are queued for batch processing .
- The following text will be displayed to the user on the user interface, "There are too many cases selected to reassign now. This reassignment will need to be performed in batch mode, please schedule with your administrator ".
- The administrator will have to set up the scheduling of the batch launcher that will invoke the case reassignment batch process.
- In case of batch processing any case that failed re-assignment due to failure of business validations or application exception will be notified and only that case will be rolled back .
- Both the current owner and the new owner will be informed by means of a notification.
- A summary report of the batch processing is also available as an email.



- **Message/Notification**  
A number of new notifications have been introduced for the new design of cases re-assignment functionality.
  - On successful case re-assignment notification (deferred process), **Subject:** Reassignment of cases from <x> to <y> completed successfully **Content:** Reassignment of cases from <x> to <y> completed successfully *X* and *Y* refer to the cases reassigned from and to.
  - On failure case re-assignment notification (deferred process), **Subject:** Reassignment of cases from <x> to <y> was unsuccessful. **Content:** The following caused the reassignment to fail: <message> *X* and *Y* refer to the cases reassigned from and to <message> refers to the cause of failure, like, User <<toUser>> is not an active user and cases cannot be reassigned to this user.
  - Summary report in case of batch processing **Subject:** Report from 'Bulk case reassignment' batch job run on <<datetime>> **Content:** Number of cases specified for reassignment: *A* Number of cases successfully reassigned: *B* Number of failed reassignments: *C* Number of invalid cases: *D* **Note:** Notifications were sent to owners informing them of the failed reassignments. Job started at <<start date time>> and took <<elapsed time>> to complete. *A* refer to the number of cases chosen for reassignment *B* refer to the number of cases successfully reassigned *C* refer to the number of cases that failed reassignment, optional, will appear only where there are failures in business logic or application exception. *D* refer to the number of invalid cases, i.e. where the "from" and "to" are the same, this is optional text and will be display only when such a situation occurs.
- **Case Re-assignment Batch Information**  
The batch processing is supported both as a regular batch and as chunking/streaming batch processing. It is advised to use the chunking/streaming batch processing to facilitate faster re-assignments as multiple threads can run concurrently on the chosen set of cases for processing.

Table 1: Case Re-assignment Batch Information

Description of the Batch
Regular ReassignmentBatch batch that is used to reassigns cases from one user to another target.



### Description of the Batch

**Batch ReassignmentBatchStream**  
Batch that  
is  
used  
to  
reassigns  
cases  
from  
one  
user  
to  
another  
target  
using  
chunking/  
streaming  
techniques.

## Bulk Task Forwarding

The Bulk task forwarding feature is redesigned to ensure that it is performant by making use of deferred processing and batch processing methodologies.

A new environment property

`"curam.batch.bulktaskforward.deferredprocess.max.processing.count"` has been introduced and defaults to a value of `100`. This value can then be modified by an organization to meet their specific processing requirements. Based on the value of the property, the application will either choose deferred processing of task forwarding or will queue the tasks for batch processing.

### • Execution flow

Task forwarding flow when the number of tasks are lesser than or equal to maximum processing count property value:

- When User choses to forward the tasks.
- Based on the number of tasks selected for forwarding , this value is compared with the value set for the property `"curam.batch.bulktaskforward.deferredprocess.max.processing.count"`.
- When the tasks chosen are lesser than or equal to the maximum processing count property, then the forwarding of the tasks will be executed as a deferred process.
- During deferred processing, all the tasks chosen will be re-assigned on success or all the tasks will be rolled back on failure due to some business logic validation failure or application exceptions.
- Both the current owner and the new owner will be informed by means of a notification.

Task Forwarding flow when the numbers of tasks are greater than the maximum processing count property value.

- User chooses to Forward tasks.
- Based on the number of Tasks selected for Forwarding, this value is compared with the value set for the property, `"curam.batch.bulktaskforward.deferredprocess.max.processing.count"`.

- When the Tasks chosen are greater than this value, these Tasks are queued for batch processing.
- The following text will be displayed to the user on the user Interface, “There are too many tasks selected to forward now. This forward will need to be performed in batch mode, please schedule with your administrator.”
- The administrator will have to setup up the scheduling of the batch launcher that will invoke the Task forward batch or Assigned Task Forward batch.
- In case of batch processing any Tasks that failed Task forwarding due to failure of business validations or application exception will be notified and only that Task will be rolled back.
- Both the current owner and the new owner will be informed by means of a notification.
- A summary report of the batch processing is also available as an email.
- **Message/Notification**  
A number of new notifications have been introduced for the new design of Task Forward functionality.
  - On successful task forward notification (deferred processing) **Subject:** Forwarding of tasks from *X* to *Y* completed successfully **Content:** Forwarding of tasks from *X* to *Y* completed successfully *X* and *Y* refer to the tasks reassigned from and to.
  - On failure task forward notification (deferred processing) **Subject:** Forwarding of tasks from *X* to *Y* was unsuccessful **Content:** The following caused the forward to fail: <message> *X* and *Y* refer to the tasks reassigned from and to <message> refers to the failure in business logic or application exception, like, the task <<*X*>>, is closed and cannot be forwarded.
  - Summary report in case of batch task forwarding **Subject:** Report from 'Bulk Task Forward' batch job run on <<datetime>> **Content:** Number of tasks specified for forward: *A* Number of tasks successfully forwarded: *B* Number of tasks failed forward: *C* Number of invalid tasks: *D* **Note:** Notifications were sent to owners informing them of the failed reassignments. Job started at <<startdatetime>> and took <<elapsedtime>> to complete. *A* refer to the number of tasks chosen for forwarding *B* refer to the number of tasks forwarded successfully *C* refer to the number of cases that failed reassignment, optional, will appear only where there are failures in business logic or application exception. *D* refer to the number of invalid tasks, i.e. where the "from" and "to" are the same, this is optional text and will be display only when such a situation occurs.
- **Bulk Task Forwarding Batch Information**  
The batch processing is supported both as a regular batch and as chunking/streaming batch processing. It is advised to use the chunking/streaming batch processing to facilitate faster forwarding as multiple threads can run concurrently on the chosen set of tasks for processing.

Table 2: Bulk Task Forwarding Batch Information

Description of the Batch
TaskForwardBatch
Supervisor user wants to forward the Reserved tasks which are available under Open tasks tab in bulk, then he need to execute the "Forward batch" which invokes TaskForwardBatch interface to forward the queued Reserved task from one user to other Target type.

Description of the Batch	RegularForwardBatchStream batch that is used to forward the Reserved tasks which are available under Open tasks tab in bulk, from one user to another target using chunking/streaming techniques.
--------------------------	--

**Description  
of  
the  
Batch**

Assigned  
Supervisor  
Forward  
Batch  
to  
forward  
the  
Assigned  
tasks  
Which  
will  
available  
under  
Available  
tasks  
tab  
in  
bulk  
then  
he  
need  
to  
use  
the  
"Assigned  
Task  
Forward  
batch"  
which  
invokes  
AssignedTaskForwardBatch  
to  
forward  
the  
queued  
Assigned  
task  
from  
one  
user  
to  
other  
Target  
type.

**Description  
of  
the  
Batch**  
**Assigned  
Task**  
**Forward  
BatchStream**  
used  
to  
forward  
the  
Assigned  
tasks  
which  
are  
available  
under  
Available  
tasks  
tab  
in  
bulk,  
from  
one  
user  
to  
another  
target  
using  
chunking/  
streaming  
techniques.

**Note:** The current design mandates the execution of both of the Bulk Task Forward batches. The software will be enhanced in the future where in there won't be two batches, but one single batch will be maintained .to serve the purpose of both the batches.

# 1.4 Managing Work for Cases

## Introduction

Supervisors may be responsible for a large number of cases. The Cúram Supervisor Workspace provides a case filter. This allows supervisors to focus on particular groups of cases. From such a filtered list, cases can be viewed using the Case Workspace. This allows the supervisor to manage and distribute the workload of a case. In addition to this task functionality, the Case Workspace provides the supervisor with the ability to reassign the case to a new owner. This can be done manually by selecting a new user, or by choosing automatic case reassignment. Finally, a case user schedule allows the supervisor to view activities for users with a role on the case.

## The Case List in the Supervisor Workspace

The supervisor manages work for the following cases:

- Cases that are owned and supervised by the supervisor.
- Cases that are owned by one of the supervisor's users.
- Cases that are owned by one of the supervisor's positions.
- Cases that are owned by one of the supervisor's organization units.
- Cases that are owned by one of the supervisor's work queues.

To preserve system performance, the supervisor must filter the case list by case owner. Also, a supervisor can filter the cases by product and case status. If the case status is not selected, closed cases are not returned to the supervisor.

Filtering enables the supervisor to manage a single set of cases at a time, for example, all cases with a status of approved.

## The Case Workspace

The Case Workspace enables the supervisor to assess the task load associated with a case, and to distribute those tasks as he or she sees fit. Any issues that are associated with the case can be viewed, and reassigned if necessary. The supervisor can also access the case users schedule, which lists the activities of all users who have a role in the case. It is also possible to reassign the case itself to another user.

## Reassigning Cases to New Case Owners

A case can be reassigned to a new owner by the supervisor. The supervisor can reassign the case to an owner of their choice, or instruct the system to automatically reassign the case to a new case owner.

### ***Automatic Case Reassignment***

The supervisor can choose to have the application automatically reassign the case. The default processing provided with the Cúram Supervisor Workspace reassigns the case on the basis of a few simple rules:

1. **Number of Assigned Cases:** The system reassigns the case to the user who has the fewest assigned cases.
2. **Number of Reserved Tasks:** If more than one user has the smallest number of cases, the system checks their reserved tasks, and assigns the case to the user with the fewest reserved tasks.
3. **Number of Assigned Tasks:** If more than one user has the smallest number of reserved tasks, The system checks their assigned tasks, and assigns the case to the user with the fewest assigned tasks.
4. **If more than one user has the smallest number of assigned tasks,** the system assigns the case randomly to one of these users.

Cases reassigned on the basis of these rules will be assigned to the user with the smallest workload at this time, aiding the supervisor in balancing workloads for his or her users.

Please note that the automatic reassignment process can be customized to fit the needs of the organization.

## Reserving Case Assigned Tasks To A User

Supervisors can reserve all or some of the tasks associated with a case to a new user, including tasks that are already assigned. Supervisors can choose the appropriate user from their list of users, or search for any user in the organization.

## Viewing Case Reserved Tasks

Supervisors can view tasks associated with cases that have been reserved in the Case Reserved Tasks page. This page displays a graph that shows open and deferred tasks as a bar chart broken down by case users. Supervisors can use this chart to drill down to lists of open and deferred tasks for each user and view details of each task. Supervisors can also forward reserved tasks to another user.

## Case Users Schedule

The Case Users Schedule displays the number of activities scheduled in a week for each user who has a role on the case. The page is initially displayed for the current week, and the supervisor can use the Previous Week and Next Week links to move back and forward in weekly intervals to view historical and future activities. Clicking the 'Activities In Week' link for a user, opens that user's calendar.

# 1.5 Managing Cases With Issues

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## Introduction

In order to ensure the smooth progression of cases, it is useful for the supervisor to be able to isolate cases with issues attached to them. The issues associated with a case must be resolved in order to move the original case through its life cycle. The Cúram Supervisor Workspace enables the supervisor to view all cases with issues, and issues associated with a single case.

## Getting an Overview of all Cases With Issues

Cases With Issues uses a heat map and list, to display cases with issues ranked by the number of issues that are associated with them. This helps the supervisor to prioritize cases that require more work. The supervisor can drill down to the Case Issues page for an individual case from either the heat map or list. Case issues can be viewed by type and by age, and from here they can also be reassigned, if necessary.

### ***Heat Maps***

The Cases With Issues page is a graphical representation of all cases managed by the supervisor registered this week, that have associated issues. The heat map is color graded by the number of issues associated with each case. Cases with the highest number of associated issues are marked in red, and those with the lowest are in blue. This enables the supervisor to quickly distinguish which cases will require more work at this point. The supervisor can drill down to the Case Issues page for each case on the heat map to gain more detailed information on the issues associated



with it. The supervisor can also choose to view the heat map for a single day, rather than the entire week.

Supervisors can view different weeks using the Previous Week and Next Week links.

### ***List of Cases With Issues***

The Cases With Issues list shows cases which were registered during the current week, that have associated issues. It is sorted by the number of issues associated with each case in descending order. As with the heat map, the supervisor can navigate between weeks, and drill down to the Case Issues page for each case.

### **List of Cases With Issues By Date**

The supervisor can drill down to view cases with issues that were registered on a single day. The Case With Issues By Date page can be viewed as a heat map or as a list sorted by the number of issue cases associated with each case. The Case Issues page for each case can be directly accessed from both of these views, and individual or multiple issues can be reassigned.

## **Managing Issues Associated with a Single Case**

The supervisor can drill down from the heat maps and lists described above to a list of the issues associated with one case. The supervisor can view these issues grouped by type or age.

### ***Viewing Issues Associated with a Case by Type***

Viewing the issues associated with a case by type enables the supervisor to quickly assess which type of issue occurs most frequently on this case, so that these issues may be addressed effectively. Case issues can be viewed by type as a bar chart or list. From the bar chart, the supervisor can drill down to a list of issues of a particular type. This allows the supervisor to reassign all or some issue cases of a particular type, to an individual user who specializes in this type of work. The supervisor can also reassign the issues using the automatic reassignment option.

Case issues can also be viewed as a basic list sorted by type.

### ***Viewing Issues associated with a Case by Age***

The issues associated with a case can be viewed as a list sorted by the age of the issue. This allows supervisors to ensure that the oldest issues are addressed promptly.

## **1.6 Managing Cases With Appeals**

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### **Introduction**

If Appealss is installed, the Cúram Supervisor Workspace makes appeals management functionality is available to the supervisor.

In order to ensure the smooth progression of cases, it is useful for the supervisor to be able to isolate cases with appeals attached to them. The appeals process associated with a case must be resolved in order to move the original case through its life cycle. The Cúram Supervisor

Workspace enables the supervisor to view all cases with appeals, and the appeals associated with a single case.

## Getting an Overview of all Cases With Appeals

Cases With Appeals uses a heat map and list, to display cases with appeals ranked by the number of appeals that are associated with each case. This helps the supervisor to prioritize cases that require more work. The supervisor can drill down to the Case Appeals page for an individual case from either the heat map or list. Case Appeals can be viewed by type and by deadline, and from here they can also be reassigned, if necessary.

### ***Heat Maps***

The Cases With Appeals page is a graphical representation of all cases managed by the supervisor, that have associated appeals. The heat map is color graded by the number of appeals associated with each case. Cases with the highest number of associated appeals are marked in red, and those with the lowest are in blue. This enables the supervisor to quickly distinguish which cases will require more work at this point. The supervisor can drill down to the Case Appeals page for each case on the heat map to gain more detailed information on the appeals associated with it.

### ***Cases With Appeals Heat Map***

The Cases With Appeals heat map shows cases that have associated appeals. Supervisors can use the heat map to drill down to the appeals associated with each case.

### ***Cases With Appeals List***

Cases With Appeals list shows cases that have associated appeals. It is sorted by the number of appeals associated with each case in descending order. As with the heat map, the supervisor can drill down to the Case Appeals page for each case.

## Managing Appeals Associated with a Case

The supervisor can drill down from the heat maps and lists described above to a list of the appeals associated with one case. The supervisor can view these appeals grouped by either type or deadline.

### ***Viewing Appeals Associated with a Case By Type***

Viewing appeals associated with a case by type enables the supervisor to quickly assess which type of appeal occurs most frequently on the case so that they may be addressed effectively. Case appeals can be viewed by type as a bar chart or list. From the bar chart, the supervisor can drill down to a list of appeals of a particular type, and access the appeal details. The appeals can be reassigned by the supervisor on the basis of type. This allows the supervisor to reassign all or some appeal cases of a particular type, to an individual user who specializes in this type of work. The supervisor can also reassign the appeals using the automatic reassignment option.

Appeals can also be viewed as a basic list sorted by type.

## ***Viewing Appeals Associated with a Case By Deadline***

The appeals associated with a case can be viewed as a list sorted by the appeal deadline. The supervisor can drill down to the appeals case home page for each appeal.

## **1.7 Managing Work for Users**

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### **Introduction**

The User Workspace enables supervisors to focus on managing the workload of individual users. Task graphs are used to provide an at-a-glance overview of the user's tasks. The work queues that a user is subscribed to are displayed. The application allows a supervisor to reserve single or multiple tasks for a user. Task redirection can be used to redirect tasks to another user that the supervisor chooses. An allocation block can be created that will prevent any task from being assigned to a user.

The User Workspace also allows supervisors view the user's calendar. Finally it provides access to user settings that can be adjusted to reflect the changing skills, working patterns, and responsibilities of the user.

### **The User Workspace**

The User Workspace enables the supervisor to oversee the work of a user, and manage the user's tasks. The user-focused functionality includes work queue subscription, task redirection, task allocation blocking, and reservation of tasks from both the user's assigned tasks and work queues to which he or she is subscribed. The supervisor can assign, reserve, and unreserve tasks to a user to balance his or her workload.

The supervisor can monitor a user's workload through task graphs. These graphs afford the supervisor an at-a-glance overview of the user's workload for the current week or month. From these graphs the supervisor can access more detailed information for a single day or week, and drill down to the details of a specific task.

The User Workspace contains a list of work queues that the user is subscribed to. The list allows the supervisor to view the Work Queue Workspace of each of the work queues. The supervisor can also unsubscribe the user from any of the work queues listed. This feature enables the supervisor to manage work queue subscription from a user perspective.

A second list displays all the organization units that the user is part of. The list allows the supervisor to view the Organization Unit Workspace of each of the organization units displayed.

### **Managing Tasks Assigned to the User**

The user assigned tasks page lists the tasks which are assigned to a user but not reserved by that user. From this list, details of each task can be viewed and individual tasks may be reserved to the user.

An application property is provided to view the Assigned Tasks as a list or view the tasks based on search criteria. The latter view is recommended when there are a large number of tasks assigned to users. If the application property "curam.supervisor.enableUserAssignedTasksSearch" is set to "Yes", no tasks will initially be displayed and the supervisor will be

able to search for tasks based on a filter criteria. If the application property "curam.supervisor.enableUserAssignedTasksSeach" is set to "No", no search will be available and all tasks will be displayed.

## Reserving Tasks

As part of managing a user's task workload, the Cúram Supervisor Workspace allows the supervisor reserve tasks to the user. The supervisor can choose to:

- Reserve a number of tasks from the user's assigned tasks list.
- Reserve a number of tasks from a work queue.
- Select a specific task to reserve to the user.

All three reservation functions share the objective of making a specific user responsible for the completion of the piece of work described in the task.

### ***Reserving Assigned Tasks To The User***

The supervisor can reserve multiple tasks from the user's assigned tasks list to the user. The supervisor can choose to reserve tasks from this list on the basis of either priority or the length of time the task has been assigned. This function allows the supervisor to pick the number of tasks to reserve, but does not allow the supervisor to choose the specific tasks. Therefore, this function should be used in cases where the supervisor is confident that the user has the skills to complete any of the tasks in the assigned tasks list.

### ***Reserving Tasks from a Work Queue for the User***

The supervisor can reserve multiple tasks from a work queue to the user. This function can be used to help clear tasks from a work queue that is overloaded. As with reserving tasks from the assigned tasks list, the supervisor can pick the number of tasks to be reserved, but cannot choose the specific tasks.

### ***Reserving a Specific Task to the User***

The supervisor can reserve a specific task to the user. This function enables the supervisor to reserve tasks that might require a special skill or knowledge to the right user.

## Options for Task Reassignment

When managing a user's workload, it is sometimes necessary to redirect the tasks assigned or reserved to that user to someone else. The Supervisor Workspace offers three main task reassignment functions; redirection, forwarding, and reallocation. These functions are briefly outlined in the table below to allow a comparison of their uses. A more detailed description of each function is provided in the subsections below.

Table 3: Task Reassignment Functions

Action	Task Type	Target	Notes
Redirect User Tasks	All of the user's assigned tasks. During the period of the redirection, any tasks that would have been assigned to the user.	A user selected by the supervisor.	Redirection can be time delimited. Redirection does not affect the user's reserved tasks.
Forward Tasks	Reserved tasks or Assigned tasks	Any allocation target may be selected by the supervisor, e.g. a user, a position, a job, an organization unit, a work queue.	Single or multiple tasks can be forwarded.
Reallocate Tasks	Reserved tasks or Assigned tasks	Allocation target selected by the allocation strategy.	Single or multiple tasks can be reallocated.

### ***Redirecting the User's Tasks***

Task redirection enables supervisors to redirect tasks from one user to another. This function is useful for situations such as annual leave. The supervisor can specify start and end dates, and choose which user to redirect to. Once a redirection is active, all tasks currently assigned to the first user are removed from the user's inbox, and added to the assigned tasks list of the second user. While the redirect is active, no new tasks are assigned to the original user; instead, the tasks are assigned to the second user. Any tasks that have been reserved for the original user remain reserved for them. The supervisor may want to consider forwarding or reallocating these reserved tasks.

Task redirection can be setup to start at a future date, running either indefinitely or for a limited period. The supervisor can view a list of active and pending redirections on the task redirection page. A full list of active, pending, and expired redirections is displayed on the task redirection history page. Any active or pending task redirections can be removed by the supervisor.

### ***Forwarding Tasks Reserved by a User***

Tasks that have been reserved by a user can be forwarded to an alternative target. Single or multiple reserved tasks can be forwarded to another user, position, job, organization unit, work queue, or allocation target. If the supervisor notices that a user is overloaded, or that a user has a number of tasks reserved that would be better handled by a different user, he or she can choose to forward some of the user's reserved tasks to other users.

### ***Reallocating Tasks Reserved by a User***

The user's reserved tasks may also be reallocated, which invokes the initial task allocation strategy. Reallocation can be a good alternative to forwarding when the supervisor has no specific user or unit in mind that would be better qualified to handle the tasks, or when tasks have been assigned to the user in error, and the supervisor is unsure what unit is responsible for that type of task. The supervisor can enter a note to explain why the task was reallocated, which is recorded in the task history.

### ***Forwarding Tasks Assigned to a User***

Tasks that have been assigned to a user can be forwarded to an alternative target. Single or multiple assigned tasks can be forwarded to another user, position, job, organization unit, work queue, or allocation target. If the supervisor notices that a user is overloaded and therefore would not be able to get through all tasks assigned to them, he or she can choose to forward some of the user's assigned tasks elsewhere.

### ***Reallocating Tasks Assigned to a User***

The user's assigned tasks may also be reallocated, which invokes the initial task allocation strategy. For example if a task was previous reassigned from another source, reallocating is an easy mechanism to revert the assignment back to its original setting.

## **Task Allocation Blocking**

In some cases, the supervisor may want to stop tasks from being assigned to a user, without wanting to specify another user to assign the tasks to. Task allocation blocking enables the supervisor to ensure that no tasks are assigned to an individual user from a specified time and date. Task allocation blocking, like task redirection, can be set up to start at a future date, and can run until a specified end time, or run indefinitely. Any task assignments that exist for the blocked user are deleted and no new task assignment records are created for the blocked user.

A list of current and pending allocation blocks can be viewed on the Task Allocation Blocking page, and a full list of the current, pending and expired allocation blocks can be viewed on the Task Allocation Blocking History page. Active or pending allocation blocks can be cleared by the supervisor.

## **Managing User Settings**

Further user information can be viewed by the supervisor as an aid to informed decision making, and some user settings can be edited.

The user settings which can be edited by the supervisor are:

- User Skills.
- User Working Patterns.
- User Case Approval Rules.
- User Evidence Approval Rules.

The supervisor can also access the details of activities in the user's calendar, in order to assess whether the user is busy, or available for more work. The supervisor cannot schedule new activities or remove activities from the calendar. Other user settings can be configured at administration level.

## ***1.8 Managing Work for Organization Units***

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## The Role of the Organization Reporting Hierarchy

In large organizations, information moves up and down the reporting hierarchy. Work is typically assigned to an organization unit, job, or position rather than to an individual. Supervisors are responsible for assessing work assigned to their organization unit. They decide firstly, whether the work is relevant, secondly, whether to redirect the work to a more appropriate unit, and finally to direct the work that is appropriate for their team, to an individual within the unit who has the appropriate skill set. The supervisor should have a knowledge of the organization structure in order to effectively redirect work. Understanding the work of other groups will allow supervisors to correctly reassign work to other allocation targets.

## The Organization Unit Workspace

The Organization Unit workspace allows the supervisors to manage work that is assigned to the users who belong to particular organization unit. The workspace contains the key details of the unit and a list of all the members, their positions, and their contact details. Managing work for an organization unit is achieved through managing work for the unit members.

## Managing Assigned Tasks for Organization Unit Members

Supervisors can monitor tasks assigned to users belonging to the organization unit, and reserve tasks to users that he or she manages. The supervisor assesses the work assigned to the organization unit, and directs the work to the individual best equipped to complete the work.

## Reserving Organization Unit Assigned Tasks to a User

The supervisor can reserve all or some of the tasks assigned to an organization unit to a single user. The supervisor can choose the user from a list of the supervisor's users, or search for any user in the organization.

## Viewing the Organization Unit Reserved Tasks

The supervisor can view the organization unit's reserved tasks on the Organization Unit Reserved Tasks page. This page displays a graph that shows open and deferred tasks as a bar chart that is broken down by user. The supervisor can use the chart to drill down to a list of open or deferred tasks for each user, and can view the details of each task.

## Organization Unit Schedule

A group schedule for all the users in an organization unit is available to the supervisor, providing an overview of the users' activities for the week. The page defaults to the current week, but it is possible to navigate back and forward in weekly intervals by using the Previous Week and Next Week links.

## 1.9 Managing Work for Work Queues

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## Introduction

From the Cúram Supervisor Workspace, the supervisor can access a list of the work queues to which the supervisor's users are subscribed. The list contains active work queues only.

The management of work for a work queue involves the reservation of tasks assigned to the work queue to users subscribed to that work queue. An overview of the assigned tasks is given by task graphs and lists on the workspace.

## Managing Supervisor's Work Queues

The purpose of the My Work Queues page is to display the list of work queues that the Supervisor is interested in monitoring. It also displays the number of tasks assigned to each of the listed work queues. The Supervisor can choose to subscribe new members to any of the work queues. On expanding each work queue the members subscribed to that work queue are listed.

The Subscribed Work Queues tab lists the work queues subscribed by various organizational objects to which the Supervisor is associated to. The work queues are divided into User Subscribed, Organization Unit Subscribed, Position Subscribed and Job Subscribed. These listings can be customized by the customers to add custom conditions. Please refer to *Using Hook Points To Customize My Work Queues page* section on how to add custom conditions.

The Unsubscribed Work Queues tab lists the work queues which are not subscribed by users of any of the organizational objects but which are administered by the Supervisor user himself. This listing can be customized by the customers to add custom conditions. Please refer to *Using Hook Points To Customize My Work Queues page* section on how to add custom conditions.

## Managing User Subscribed Work Queues

The User Subscribed Work Queues list can be configured to behave in two different ways depending on the setting of the "curam.supervisor.listSupervisorDirectlySubscribedWorkQueuesOnly" application property.

When "curam.supervisor.listSupervisorDirectlySubscribedWorkQueuesOnly" is set to "YES", the list is populated based on work queues to which the supervisor alone is subscribed. Using this approach the supervisor must subscribe to any work queue they wish to monitor. This setting is advised particularly where there are a large number of users reporting to a supervisor.

When "curam.supervisor.listSupervisorDirectlySubscribedWorkQueuesOnly" is set to "NO", the list is populated based on the users reporting directly or indirectly to the supervisor. This requires that the reporting hierarchy is first established to get the list of users and then determine which work queues these users are subscribed to. This setting is recommended only where the number of users reporting to a supervisor are small.

By default the more performant approach, of listing the work queue the supervisor subscribed to, is used out-of-the-box. This listing can be customized by the customers to add custom conditions. Please refer to *Using Hook Points To Customize My Work Queues page* section on how to add custom conditions.

## The Work Queue Workspace

The Work Queue Workspace contains key details about a work queue, including the owner of the work queue, and the sensitivity level set for the work queue. The Work Queue Workspace also



indicates whether users can subscribe themselves to a work queue. To view the Work Queue Workspace, the supervisor's account must have at least the same sensitivity level as that set for the work queue. The sensitivity level and the ownership of a work queue is set at administration level, as is the supervisor's sensitivity level.

## Managing Work Queue Subscription

If the system administrator has allowed user subscription to the work queue, users can be easily added to the work queue using the Subscribe New User function. Similarly, users can be removed from the work queue using the unsubscribe function provided with the list of subscribers.

## Managing Assigned Tasks for Work Queues

Tasks that have been assigned to the work queue and not yet reserved by a user, are displayed in a list on the Work Queue Assigned Tasks page. From this list details of each task can be viewed, and individual tasks may be reserved to a user.

An application property is provided to view the Assigned Tasks as a list or view tasks based on search criteria. The latter view is recommended when there are a large number of tasks assigned to work queues. If the application property "curam.supervisor.enableWorkQueueAssignedTasksSearch" is set to "Yes", no tasks will initially be displayed and the supervisor will be able to filter the list of tasks to be displayed based upon search criteria. If the application property "curam.supervisor.enableUserAssignedTasksSearch" is set to "No", no search will be available and all tasks will be displayed.

## Reserving Tasks in Work Queues

Multiple tasks from a work queue can be reserved to a single user using the Reserve Tasks function. The supervisor can choose a user from either a list of all the users that report to them, or search for any user in the organization using the user search. The tasks to be reserved to that user are selected from a list of all tasks assigned to the work queue.

The application property "curam.supervisor.enableWorkQueueAssignedTasksSearch" is used to view the Assigned Tasks as a list or view tasks based on search criteria. If it is set to "Yes", no tasks will initially be displayed and the supervisor will be able to filter the list of tasks to be displayed based upon search criteria. If it is set to "No", no search will be available and all tasks will be displayed.

## Viewing Work Queue Reserved Tasks

The supervisor can view tasks that have been reserved from the work queue from the Work Queue Reserved Tasks page. This page displays a graph that shows open and deferred tasks as a bar chart, broken down by user. The supervisor can use the chart to drill down to lists of open or deferred tasks for each user. From these lists the supervisor can drill down further to view the details of each task.

## Work Queue Schedule

A group schedule for all the users subscribed to a work queue is available to the supervisor, enabling an at-a-glance overview of the users' activities for the week. The page defaults to the current week, but it is possible to navigate back and forward in weekly intervals by using the Previous Week and Next Week links. Clicking on the Activities In Week link on the schedule will bring the supervisor to the user's calendar.

## 1.10 Supervisor Workspace Customization Points

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### Introduction

This chapter describes the customization points offered in Supervisor Workspace application.

### Using Hook Points To Customize My Work Queues page

The My Work Queues page lists the work queues subscribed by Users, Organization Units, Jobs and Positions. It also lists the work queues which are not subscribed by anyone. This section explains how to customize each of these work queue listings.

- To customize the User Subscribed Work Queues, override the following method in the *curam.supervisor.sl.impl.SupervisorWorkQueuesFetcher* interface using the standard Guice dependency injection mechanism:  
*curam.supervisor.sl.impl.SupervisorWorkQueuesFetcher.listUserSubscribedWorkQueues(curam.core.struct. ...)*  
Note that if the hook is implemented then the application property will be ignored.
- To customize the Organization Unit Subscribed Work Queues, override the following method in the *curam.supervisor.sl.impl.OrgUnitSubscribedWorkQueuesFetcher* interface using the standard Guice dependency injection mechanism:  
*curam.supervisor.sl.impl.OrgUnitSubscribedWorkQueuesFetcher.listOrgUnitSubscribedWorkQueues(curam. ...)*
- To customize the Position Subscribed Work Queues, override the following method in the *curam.supervisor.sl.impl.PositionSubscribedWorkQueuesFetcher* interface using the standard Guice dependency injection mechanism:  
*curam.supervisor.sl.impl.PositionSubscribedWorkQueuesFetcher.listPositionSubscribedWorkQueues(curam. ...)*
- To customize the Job Subscribed Work Queues, override the following method in the *curam.supervisor.sl.impl.JobSubscribedWorkQueuesFetcher* interface using the standard Guice dependency injection mechanism:  
*curam.supervisor.sl.impl.JobSubscribedWorkQueuesFetcher.listJobSubscribedWorkQueues(curam.core.stru ...)*
- To customize the Unsubscribed Work Queues, override the following method in the *curam.supervisor.sl.impl.SupervisorAdministratedWorkQueuesFetcher* interface using the standard Guice dependency injection mechanism:  
*curam.supervisor.sl.impl.SupervisorAdministratedWorkQueuesFetcher.listSupervisorAdministratedWorkQue ...)*

### Using Hook Point To Filter Out Cases

A supervisor may have many cases to monitor and manage as part of their job, to help them in this it is important that only relevant workload which they need to manage is presented to them. Out of the box case types that do not require to be monitored or managed by the supervisor are filtered out.

However, it is possible that customers introduce their own case types to meet their business needs and therefore these case types may or may not need to be monitored and managed by a supervisor. If such case types also need to be filtered out, a custom implementation has to be provided to the interface `curam.core.hook.impl.SWExcludedCases` and bind the same using the Guice multi-binder in the Module class of that component. Persistence Cookbook explains in detail on how to create a Module and how to bind an implementation using a multi-binder. Once this is done, all the cases that are not required to be monitored or managed by the supervisor will not be displayed in the following views on the Supervisor Workspace-

- Cases tab of a User's workspace
- Assigned Workload
- My User's page
- User Workload
- Reassign Cases

Note that if a custom implementation is provided for the above hook, then the additional cases returned by the custom implementation will also be filtered out and will not be displayed on the supervisor workspace. Otherwise only the cases returned by the default implementation which does not require management by the Supervisor will be filtered out.

## 1.11 Conclusion

### Summary of Concepts

The following is a summary of the concepts covered in this guide:

- Cúram Supervisor Workspace assists supervisors by providing them with the tools efficiently to balance work loads for users.
- This includes tools to monitor and move cases and tasks through their life cycles.
- The Cúram Supervisor Workspace consists of the following workspaces: the Supervisor Workspace, the Case Workspace, the User Workspace, the Organization Unit Workspace, and the Work Queue Workspace.
- The application also includes heat maps for tracking issues. If the Appeals module has been installed, the Supervisor Workspace includes functionality to manage cases with appeals.

### Summary of Functionality

The following table is a summary of some of the functionality provided in the Cúram Supervisor Workspace.

*Table 4: Supervisor Functionality*

Function	Actor(s)	Workspace(s)
Reserve Task(s)	Supervisor to User	Case Workspace, User Workspace
Forward Task(s)	Supervisor to User, Organization Unit, Work Queue, Job, or Position	Case Workspace, User Workspace

Function	Actor(s)	Workspace(s)
Reallocate Task(s)	Supervisor to User, Organization Unit, Work Queue, Job, or Position	User Workspace
Reassign Case	Supervisor to User	Case Workspace, User Workspace, Cases With Issues, Cases With Appeals
Redirect Task(s)	Supervisor to User	User Workspace
Block Task Allocation	Supervisor to User	User Workspace
Create or Modify User Skills	Supervisor to User	User Workspace
Create or Modify User Working Patterns	Supervisor to User	User Workspace
Create or Modify User Case Approval Rules	Supervisor to User	User Workspace
Create or Modify User Evidence Approval Rules	Supervisor to User	User Workspace
Subscribe or Unsubscribe User Subscription to Work Queues	Supervisor to User and Work Queue	User Workspace, Work Queue Workspace

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