System Actions for a Case

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V3.2

For any case in Cora OpsManager, some pre-defined system actions exist.

NOTE
As a Power user, you can configure the display of these system actions. For details, see this article.

Explained below are the system actions available for a case.

New Request

Click "New Request" on case, to open a pop-up window, and enter the following:

Field	Description
To Group	Team to whom the request is sent. This appears by default. You can switch this field to 'To User' by clicking on the 'To User' link appearing next to the field.
To User	User to whom the request is sent. You can switch to 'To Group' field by clicking the 'To Group' link appearing next to the field.
Subject	Subject of the request.
Reason	Reasons defined for the specific status, and the action request.
Choose Attachments	Attachments to the request, if any.
Body	Details of the request.

On clicking "Send Request", the system will generate a request task to the selected team, and the status of the case will change to "Internal Request". This task is displayed under My Tasks on Flowtime.

New Comment

Click "New Comment" on case, to open a window with rich text editor to add comments. These comments appear in the Conversations tab.

New Email

Click "New Email" on a case, to open a window, and enter the following:

Field	Description
To	Mail ID of the main recipient of the mail. Based on the entered, the system suggests the mail ID from the address book. You may also add new mail IDs to the address book from this field, if required.
CC	Mail ID of the recipient to whom the mail is to be copied. This field is hidden by default.
BCC	Mail ID of the recipient(s) to whom the mail is to be blindly copied. This field is hidden by default.

Field	Description
Template	Template to be chosen for the new email. Selection of template will auto populate the subject (in new email) and body section. This field is filterable such that on entering some text only the templates with the text in its name will appear in the list for selection.
Subject	Subject of the email. Based on the chosen template, the subject is auto populated but, you may edit, if required.
Reason	Reason for which the mail is being sent. Select a reason from the existing list.
Signature	Signature chosen for the new email. By default, the signature set as default for the user appears in the email body.
Choose Attachment	Attachments to the mail, if any.
High Importance	To mark the email as important. Visible only for emails sent to Outlook account.
Reminder Required	To send a reminder for the email.
Body	Mail body, the content of the mail.

Click Save as Draft, to save the email as draft and send later.

Click Send Message. to send the email and change the case status to Awaiting Response. If the new email is received for a case with status Ready for Processing, or Awaiting Response, or Awaiting Approval, the case status will change to Response Received.

Click Send without changing status, to send the email without changing the case status to Awaiting Response.

V2.0 and earlier

For any case in Cora OpsManager, some pre-defined system actions exist for cases.

Explained below are the system actions available for a case.

New Request

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

Field	Description
To Group	Team to whom the request is sent. This appears by default. You can switch this field to 'To User' by clicking on the 'To User' link appearing next to the field.
To User	User to whom the request is sent. You can switch to 'To Group' field by clicking the 'To Group' link appearing next to the field.
Subject	Subject of the request.
Reason	Reasons defined for the specific status, and the action request.

Field	Description
Choose 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”. This task is displayed under the My Tasks on Flowtime.

> **NOTE**
> New request button may be hidden in your Operation.

New Comment

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

New Email

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

Field	Description
To	Mail ID of the main recipient of the mail. Based on the entered, the system suggests the mail ID from the address book. You may also add new mail ids to the address book from this field, if required.
CC	Mail ID of the recipient to whom the mail is to be copied. This field is hidden by default.
BCC	Mail ID of the recipient(s) to whom the mail is to be blindly copied. This field is hidden by default.
Template	Template to be chosen for the new email. Selection of template will auto populate the subject (in new email) and body section.
Subject	Subject of the email. Based on the chosen template, the subject is auto populated but, you may edit, if required.
Reason	Reason for which the mail is being sent. Select a reason from the existing list.
Signature	Signature chosen for the new email. By default, the signature set as default for the user appears in the email body.
Choose Attachment	Attachments to the mail, if any.
High Importance	To mark the email as important. Visible only for emails sent to Outlook account.
Reminder Required	To send a reminder for the email.
Body	Mail body, the content of the mail.

After the mail is sent, the case status changes to Awaiting Response. If the new email is received for a case with status Ready for Processing, or Awaiting Response, or Awaiting Approval, the case status will change to Response Received.