

Modify Case Action and Status Labels in Cora OpsManager

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Previous to V3.0

For a case, the Case Status and Case Action appear on the Case details page, as shown below:

The screenshot displays the Cora OpsManager interface for a case. At the top, a workflow progress bar shows five stages: 'Indexing Required', 'Ready for Processing', 'With SME' (highlighted with a red box), 'Audited (With QA)', and 'Pending Closure'. Below the workflow, the case title is '2559 pre case creation notification' with a 'Created' date of '26/05/2019 09:52:15' and a 'Target' date of '28/05/2019 11:00:00'. The case details include: Status: 'Ready for Processing', Priority: 'Medium', Category: 'Loans', Type: 'Home Loans', and Sub Type: 'Renovations'. A 'More Details >' link is present. Below the details, there are tabs for 'Conversations', 'Audit Log', 'Attachments', 'Linked Cases', and 'QC Parameters'. The 'Conversations' tab is active, showing a table with columns for 'Sender', 'Message', and 'Actions'. Two messages are listed: one from 'PrePendingClosure event' to 'Operator' at 10:03:08 with the message 'Pre Pending Closure Approved', and another from 'Uri Briskin' to 'Operator 05' at 10:00:42 with the message 'I see what you did there'. To the right of the conversations, there is a panel with several action buttons: 'On Hold' (highlighted with a red box), 'To Expert (Send to SME)', 'Approval', 'Pending Closure', 'Reject', and 'Send To Team Leader'. Below these buttons is a 'Properties' section.

In Cora OpsManager, the out-of-the-box (OOTB) label settings are available to power users on Label Settings tab under Ops Manager Admin. The power user can edit the existing Case Action and Case Status labels but can not add any new labels in this menu.

To modify label settings:

1. Go to **Flowtime > Ops Manager Admin > Label Settings**.
2. Click edit icon for a record.
3. Make changes accordingly.
4. Click  to save the changes or click  to discard the changes.

The below screen shows the modified Case Status and Case Action label on case details page:

V3.0 and later

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