

Split Case in Cora OpsManager

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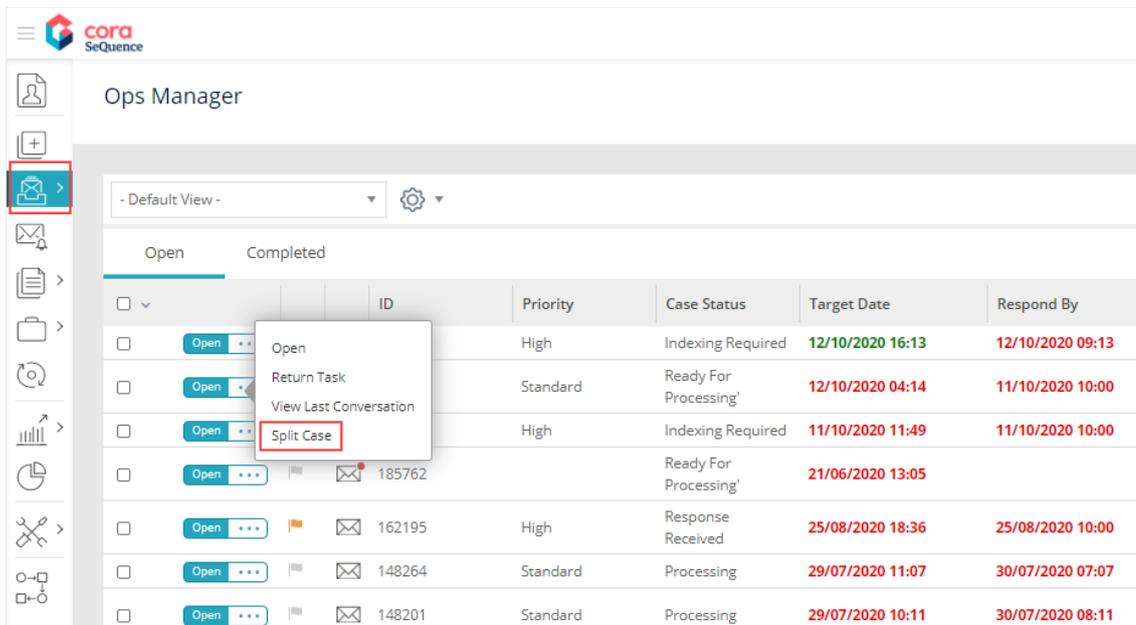
V3.3

Overview

Consider a scenario where an email from customer includes two or more requests for different teams. Based on the received email, system creates a single case automatically in Cora OpsManager. To assign relevant requests to respective teams, you can split this case into maximum three child cases, at the Indexing Required and Ready for Processing stages.

You can split a case from the following pages in Cora OpsManager:

- from context menu in My Tasks list:
 1. In Cora OpsManager, go to **My Tasks > Ops Manager**.
 2. From the list, click the vertical ellipsis for a case to open a context menu.
 3. Click **Split Case** from the context menu.



The screenshot displays the Cora OpsManager interface. The top navigation bar includes the Cora logo and 'Sequence'. The main content area is titled 'Ops Manager' and shows a list of cases. The list has columns for 'Open', 'Completed', 'ID', 'Priority', 'Case Status', 'Target Date', and 'Respond By'. A context menu is open over the case with ID 185762, which is in 'Indexing Required' status. The 'Split Case' option is highlighted in red in the context menu.

Open	Completed	ID	Priority	Case Status	Target Date	Respond By	
<input type="checkbox"/>				High	Indexing Required	12/10/2020 16:13	12/10/2020 09:13
<input type="checkbox"/>				Standard	Ready For Processing'	12/10/2020 04:14	11/10/2020 10:00
<input type="checkbox"/>				High	Indexing Required	11/10/2020 11:49	11/10/2020 10:00
<input type="checkbox"/>		185762		Ready For Processing'	21/06/2020 13:05		
<input type="checkbox"/>		162195	High	Response Received	25/08/2020 18:36	25/08/2020 10:00	
<input type="checkbox"/>		148264	Standard	Processing	29/07/2020 11:07	30/07/2020 07:07	
<input type="checkbox"/>		148201	Standard	Processing	29/07/2020 10:11	30/07/2020 08:11	

- from Linked Cases tab in case details page, only for cases with status Ready for Processing
 1. Open a case from task list that is in status Ready for Processing.
 2. In the Linked Cases tab, click **Split Case**.

Return Task

Indexing Required Ready For Processing'

188584

Status: Ready For Processing' Priority: Standard Category: Loans Type: Business Loan

Conversations Audit Log Attachments **Linked Cases** Respond By (Overdue): 11/10/2020 10:00:00

Split Case Link to Parent Case

Linked Parent Case

Case No	Category	Type	Sub Type	Status	Created at	Actions
188011				Ready For Processing'	11/10/2020 04:14:28	View Case Remove

- from Indexing Required page, only for cases with status Indexing Required
 - Open a case from task list that is in status Indexing Required.
 - In the Indexing Required window, click **Split Case**.

Return Task

189202
New Case - Indexing

Subject [Redacted]
From [Redacted].digital
To [Redacted]!@gmail.com
Received At 11/10/2020 16:13:22

[Redacted]

Details

Category * Laptops
Type * Lenovo
Sub Type * Think-pad
Priority * Standard
Country * Israel
Case Communication Email * [Redacted]@gmail.com

No Custom Views for selected config set

Attachments

+ Add Attachment

File	Uploaded By	Date	Remove
Drop files here to upload or choose files			

Reject Case Save Submit Split Case

The new cases created after split are displayed as Child cases in the Linked Cases tab of main case, and have status Ready for Processing. For these cases, no case creation notification is sent to the user.

You can process split cases individually, and also delete each case individually, if required.

To split a case:

1. In the Split Case window, select the number of cases you want to split case into. Depending on the selected number, sections appear in the same window.

Split case
x

[#190600] Loan request

Received From John	Received At 13/10/2020 05:27:16	Input Channel Manual	Requestor Email john1527@gmail.com
Category Loans	Type Business Loan	Sub Type Loan against property	Priority High

Number Of Splits * 2

Original Case - Comment

Case was split

Case 1 🗑️

Category * Loans	Type * Business Loan	Sub Type * Loan against property	Priority * High
Case Communication Email * STGJK2@gmail.com	Country * Israel		
Attachments Please Select ...	Received At Original case date	Duplicate initial communication emails <input checked="" type="checkbox"/>	

Comments
 Created from split

Case 2 🗑️

Category * Loans	Type * Business Loan	Sub Type * Loan against property	Priority * High
Case Communication Email * STGJK2@gmail.com	Country * Israel		
Attachments Please Select ...	Received At Original case date	Duplicate initial communication emails <input checked="" type="checkbox"/>	

Comments
 Created from split

Cancel
Save
Split Case

2. Add comments for original case. Default comment is **Case was split**.
3. In each split case section, edit details per requirement.
 You can also select attachments for split case from the original case actual attachments.
 The default comment for split case is created from split.
4. Click **Split Case**.
 A confirmation message appears, and split cases appear as child cases in the same tab. These cases also appear as individual cases in task list.

The delete icon for each split case section allows you to delete the split case individually.