

Split Case in Cora OpsManager

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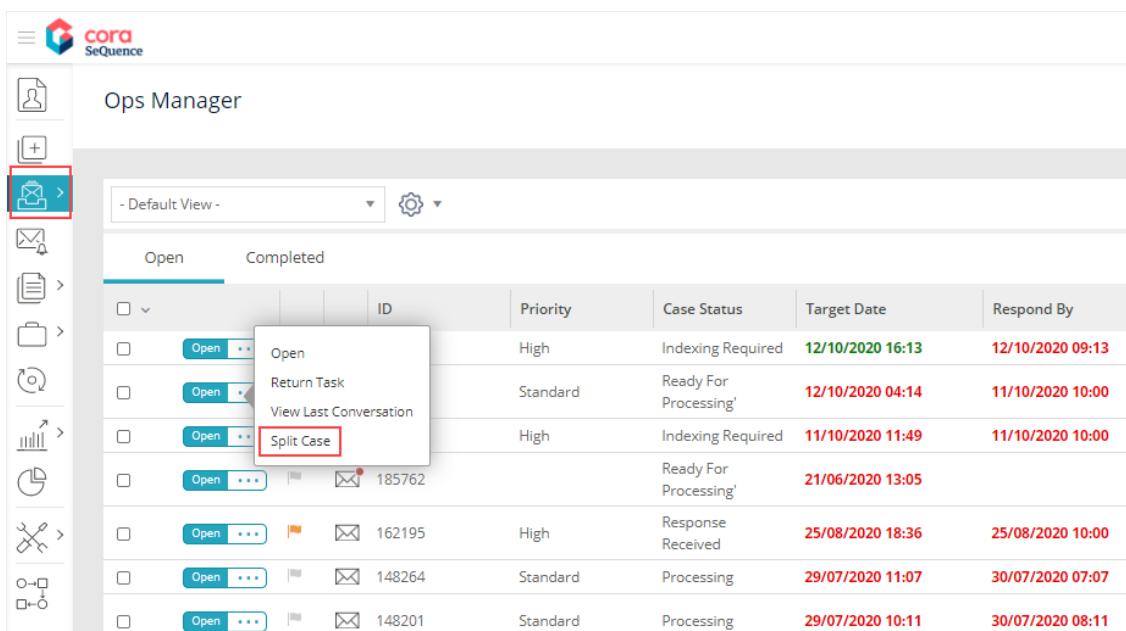
V3.3

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.



- 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**.

The screenshot shows a software interface for managing cases. At the top, there's a navigation bar with a 'Return Task' button and a status indicator 'Indexing Required' with a checkmark. Below this, a red box highlights the status 'Ready For Processing' for case number 188584. The case details include: Status 'Ready For Processing', Priority 'Standard', Category 'Loans', and Type 'Business Loan'. A tab labeled 'Linked Cases' is also highlighted with a red box. On the right, a 'Respond By (Overdue)' timestamp is shown as '11/10/2020 10:00:00'. Below these, a 'Split Case' button is enclosed in a red box. A 'Link to Parent Case' button is located to the right. A table titled 'Linked Parent Case' lists one row: Case No 188011, Category, Type, Sub Type, Status 'Ready For Processing', Created at '11/10/2020 04:14:28', and Actions with 'View Case' and 'Remove' links.

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
 1. Open a case from task list that is in status Indexing Required.
 2. In the Indexing Required window, click **Split Case**.

189202
New Case - Indexing

Subject [REDACTED]

From [REDACTED].digital

To [REDACTED]!@gmail.com

Received At 11/10/2020 16:13:22

Details

Category * Laptops	Type * Lenovo	Sub Type * Think-pad
Priority * Standard	Country * Israel	Case Communication Email * @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

[#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 *	Type *	Sub Type *	Priority *
Loans	Business Loan	Loan against property	High
Case Communication Email *	Country *		
STG.JK2@gmail.com	Israel		
Attachments	Received At	Duplicate initial communication emails	
Please Select ...	Original case date	<input checked="" type="checkbox"/>	
Comments	Created from split		

Case 2

Category *	Type *	Sub Type *	Priority *
Loans	Business Loan	Loan against property	High
Case Communication Email *	Country *		
STG.JK2@gmail.com	Israel		
Attachments	Received At	Duplicate initial communication emails	
Please Select ...	Original case date	<input checked="" type="checkbox"/>	
Comments	Created from split		

Buttons: 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.