# **Add Configuration Set Properties**

Last Modified on 04/11/2024 8:41 am EDT

# V4.0 and later

As a Power user, you can define the properties for a Configuration Set on the Configuration Sets page.

On Flowtime, in the hamburger menu go to Admin>Configuration Sets.

COTO Orchestration	Case	Manager 🗸		
E Admin +				
Configuration Sets ~				
Case Category	Case Typ	е		Case Sub Type
All	~ All		~	All
Details SME SLA Reminders Actions	System Actions Reasons	Email Templates	Statuses for Target Date Extensi	ion QC Settings

## Details

On this tab, add details of the Configuration Set:

Field Name	Description
Set Name	To display the unique name of the Configuration Set. Default name displayed is the chosen configuration set, Category > Type > Sub Type.
Case Creation Template	To display the list email ids defined in Email Templates section. The chosen email Id will be the default for new case created email notifications for the config set.
Client Properties View	Create a workflow, and an activity that will hold the custom views. For details on how to do that, see this article.
Case Priority	To define priority of a case. The available out of the box priorities are High, Medium, Low, and Standard.
Is Indexing Required?	To select if the case will go to indexing regardless the input channel definition.

Field Name	Description
Message Response Time	To define the time by which a reply needs to be sent for the email message received for a config set. To understand how Cora OpsManager configures the message response time, see this article.
Message Response Time Unit	<ul> <li>To define the unit in which response time is considered.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Week</li> <li>Month</li> <li>Business Day</li> <li>Hours from start of the working day</li> </ul>
ТАТ	To define the turnaround time for the case. This is the time allowed to solve the cases of this config set. To understand how Cora OpsManager calculates the target date, see this article.
TAT Unit	<ul> <li>To choose the unit in which TAT is calculated.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Business Day</li> <li>Week</li> <li>Month</li> <li>Hours from start of the working day</li> </ul>
Priority Specific TATs	<ul> <li>To define the case TAT based on the changed priority (If default priority is changed).</li> <li>Columns in the grid: <ul> <li>Priority</li> <li>TAT</li> <li>TAT Unit</li> <li>Ignore Cut Off (start calculating the TAT regardless of the time the case is received)</li> </ul> </li> </ul>

# SME SLA

For each priority, you can set an SLA for SME. When an operator sends the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

## Reminders

A Reminder is sent for a case related email when no response is received after a set number of days. You can set a maximum of three reminders for each configuration set, and decide time period in business days or hours after which each reminder is sent.

Details	SME SLA	Reminders	Actions	System Actions Reasons	Email Templates	Statuses for Target Date Extension	QC Settings
Remind	er 1						
1.00		Business [	Day 🗸				
Remind	er 2						
2.00		Business [	)ay 🗸				
Remind	er 3						
3.00		Business [	Day 🗸				
Include ✓	Message in the	ereminder			Sa	ve	

While sending an email, a Reminder Required check box appears in the email window. Selection of this check box decides the sending of email reminders. For more details, see this article.

Select the Include message in the reminder check box to include the original message to the reminder mail.

## Actions

The Actions for a Config Set are defined as per Case status.

When the Case reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

Some actions require reasons, and so the **Manage Reasons** button appears for these actions. You must add at least one reason for such actions. Each reason is a *hierarchic tree field* that allows you to type the reason in preferred languages.

Actions available out of the box:

Action Name	Result	Case status changes to	Comments
On Hold	Puts the case on hold Reason is required	On Hold	Add Make Available for On Hold action
Send Approval Email	Generates PDF summary of a case and allows user to send email for external approval.	Awaiting Approval	The Subject of the email will have the keyword [Approval]. On receiving the approval response, the case status changes to Response Received.

Action Name	Result	Case status changes to	Comments
Make Available	Makes a case available for processing	Ready for Processing The status that was previous for the status was with CA Awaiting Closure On Hold In such case, the status status that was previous to those statuses.	It is recommended to add Make Available action for On hold.
Close	Closes a case	Closed	Skips Pending Closure and Dis recommended to add Close action when the Case status is Pending Case status is Pending Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	<ul> <li>Checks if QA is needed <ul> <li>If Yes and QA is</li> <li>blocking, QA task</li> <li>generated and</li> <li>assigned to QA's in</li> <li>Team. Status is</li> <li>updated to With</li> <li>QA.</li> </ul> </li> <li>If Yes and QA is <ul> <li>non-blocking, QA</li> <li>task generated and</li> <li>assigned to QA's in</li> <li>Team, Status is</li> <li>updated to Pending</li> <li>closure and</li> <li>Pending closure</li> <li>email is sent to</li> <li>requestor.</li> </ul> </li> <li>If QA is not needed, status is updated to</li> <li>Pending closure</li> <li>and Pending closure</li> </ul>	Pending Closure/With QA	Reason is required, received after Pending changes to Pending Received.
Send to Team Leader	Sends the case to the team leader	With Team Lead	
Back to Team Member	Sends the case back to the assigned team member	Ready for Processing	Use only when the status is With Team Leader
Send to SME	Assigns the case to the selected SME	With SME	To assign the case to an SME, the SME must exist in the team.

Action Name	Result	Case status changes to	Comments
Return to Processor	Returns the case from SME to the user who has sent the case to SME	SME Responded	Use only when the status is With SME
Return to Team	Returns the case from SME to the team	SME Responded	Use only when the status is With SME
Complete Task	Marks the task as complete when approved	Ready for Processing	

# System Action Buttons

On this tab of configuration page, you can configure the display of New Email, New Request, and New Comment system action buttons on Case details page.

### IMPORTANT

**Starting from V3.4**, this option is no longer available under Configuration Sets as the Cora OpsManager uses Conversations component from the Cora SeQuence.

# System Actions Reason

On this tab of configuration page, you can configure the following system actions that appear for a case in all statuses (except of indexing phase). These actions are supported with reasons.

- Send email
- New request
- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Sends an email outside of Cora OpsManager	Awaiting response	When a response is received the status changes to Response Received.
New Request	Sends a task to another team in Cora OpsManager	Internal Request	Once a response is received the status changes to internal Request Response Received.
QA Passed	Updates QA result to pass	If OA blocking, Status updated to Pending If OA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If OA blocking, status Upprecion Audit If OA not blocking, the Case status remains Pending Closure.	Presented only when the status is With QA.
Reject (In Indexing task)	Closes the case	Rejected	

### New email reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, if you want to change the status of the case to Pending Closure (instead of Awaiting Response), select the Set Pending Close check box.

#### New request reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- If you want that a specific reason should change the status of the case to Pending Closure (instead of Internal Request), you should select the Set Pending Close check box.

#### Reject (In indexing task) reasons

Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the Send Reject Email check box).

#### NOTE

- If no reasons are configured for a Set, the reject button will not appear in the indexing task.
- When a case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

### QA failed reasons

Add reasons for Fail action.

#### NOTE

Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

## **Email Templates**

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates are presented to the operator in the new email window of the case, on clicking Choose Email Template.

**Starting from V4.1**, you can use Cora Orchestration email templates for email composer in your solution. With these templates, you can add expressions to the email templates.

To use Cora Orchestration email templates, follow the steps below:

- 1. In the Admin site, go to Administration>Global Settings>Application Variables, and set the UseCCMTemplates application variable value to False.
- 2. Select Case Manager solution, and from the Solution Component select Conversations View.
- 3. In the Conversation View window, select **Email Settings>Email Templates**.
- 4. Click Add New Record to add the required template.

## NOTE

For each language, you need to add a different template.

# Statuses for Target Date Extension

On this tab, add statuses for configuration sets, which may lead to target date extension. As the case enters these statuses the target date font will change to italics, once the case goes out from the status the system will extend the target date according to working hours that were "missed".

You can use "Apply to all config set" option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

#### **QC** Settings

On this tab, add the QC stage settings. Following are the settings made here:

- % Cases to Sample: Percentage of cases that will be sent to QC.
- Minimum passing score: Minimum accuracy percentage required to pass the QC stage.
- QC Questions to Display: Questions that will be part of the QC form.

#### NOTE For QC tasks created before upgrade to V4.0.1, the QC score is calculated as earlier. Configuration Sets Details SME SLA Reminders System Actions Reasons Email Templates Statuses for Target Date Extension Actions % Cases to Sample 100 Minimum passing score 100 QC Questions to Display + Add new record 🖹 Save changes 🛛 X Cancel changes Weight Is Critica Question 4 What is the loan amount? $\checkmark$ What is the loan duration? Λ $\checkmark$ Is there a co-applicant? Is there any other loan going on for applicants? 5

Click **Add new record** to add a new question. Click **Save changes** to save any updates made to the existing question. Click **Cancel changes** to discard the updates made to a question.

You can set weightage for QC questions and based on the weightage a question holds value above others.

You can set questions as critical by selecting the **Is Critical** option. If the QC selects No for any critical question, then the QC task will not pass.

The accuracy score for a QC task is calculated based on the question weightage and the QC parameter set for each question.

The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three as an answer and add comments in the end. Based on the number of questions answered correctly and question weightage the accuracy score is calculated.

Conversatio	ns Audit Lo	g Attachments	Linked Cases	QC Parameters
	ments Submitted			
	Check Verified?			
	No 🔿 NA			
Is claim app	No 🔿 NA			
	al documented?			
Checklist up				
• Yes	No NA			
Comment	Approved!!			Accuracy %

# V3.x

As a Power user, you can define the properties for a Configuration Set on the Configuration Sets page.

On Flowtime, go to **Ops Manager > Ops Manager Admin > Configuration Sets**.

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	Label Settings	Case Citigory Case Type Case Sub Type	
	Target Date Calculatio	All • All • All •	
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$\odot$	Sub Types	Details SME SLA Reminders Actions System Actions Buttons System Actions Reasons Email Tempiates Statuses for Target Date Extension QC Settings	
× <u>     </u>	Category-Role Associa		
G	Configuration Sets	Set Name Case Creation Template Pending Closure Template	
*,	Email Templates	OverSet Case_details	

# Details

On this tab, add details of the Configuration Set:

Field Name	Description
Set Name	To display the unique name of the Configuration Set. Default name displayed is the chosen configuration set, Category > Type > Sub Type.
Case Creation Template	To display the list email ids defined in Email Templates section. The chosen email Id will be the default for new case created email notifications for the config set.
Client Properties View	Create a workflow, and an activity that will hold the custom views. For details on how to do that, see this article.

Field Name	Description
Case Priority	To define priority of a case. The available out of the box priorities are High, Medium, Low, and Standard.
Is Indexing Required?	To select if the case will go to indexing regardless the input channel definition.
Message Response Time	To define the time by which a reply needs to be sent for the email message received for a config set. To understand how Cora OpsManager configures the message response time, see this article.
Message Response Time Unit	<ul> <li>To define the unit in which response time is considered.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Week</li> <li>Month</li> <li>Business Day</li> <li>Hours from start of the working day</li> </ul>
ТАТ	To define the turnaround time for the case. This is the time allowed to solve the cases of this config set. To understand how Cora OpsManager calculates the target date, see this article.
TAT Unit	<ul> <li>To choose the unit in which TAT is calculated.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Business Day</li> <li>Week</li> <li>Month</li> <li>Hours from start of the working day</li> </ul>
Priority Specific TATs	<ul> <li>To define the case TAT based on the changed priority (If default priority is changed).</li> <li>Columns in the grid: <ul> <li>Priority</li> <li>TAT</li> <li>TAT Unit</li> <li>Ignore Cut Off (start calculating the TAT regardless of the time the case is received)</li> </ul> </li> </ul>

# SME SLA

For each priority, you can set an SLA for SME. When an operator sends the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

# Reminders

A Reminder is sent for a case related email when no response is received after a set number of days. You can set a maximum of three reminders for each configuration set, and decide time period in business days or hours after which each reminder is sent.

	SME SLA	Reminders	Actions	System Actions Buttons	System Actions Reaso
Reminder	1				
1.00		Business Da	ay 🔻		
Reminder	2				
2.00		Business Da	ay 🔹		
Reminder	3				
1.00		Business Da	av v		

While sending an email, a Reminder Required check box appears in the email window. Selection of this check box decides the sending of email reminders. For more details, see this article.

For more details, see this article.

Select the Include message in the reminder check box to include the original message to the reminder mail.

## Actions

The Actions for a Config Set are defined as per Case status.

When the Case reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

Some actions require reasons, and so the **Manage Reasons** button appears for these actions. You must add at least one reason for such actions. Each reason is a *hierarchic tree field* that allows you to type the reason in preferred languages.

Actions available out of the box:

Action Name	Result	Case status changes to	Comments
On Hold	Puts the case on hold Reason is required	On Hold	Add Make Available for On Hold action

Action Name	Result	Case status changes to	Comments
Send Approval Email	Generates PDF summary of a case and allows user to send email for external approval.	Awaiting Approval	The Subject of the email will have the keyword [Approval]. On receiving the approval response, the case status changes to Response Received.
Make Available	Makes a case available for processing	Ready for Processing The status that was previous for the status was with the status was provided for the status was provided for the status will change to the status to those statuses.	It is recommended to add Wake Cvallable action for On hold.
Close	Closes a case	Closed	Skips Pending Closure and Das recommended to add Close action when the case status is Pending Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	<ul> <li>Checks if QA is needed <ul> <li>If Yes and QA is</li> <li>blocking, QA task</li> <li>generated and</li> <li>assigned to QA's in</li> <li>Team. Status is</li> <li>updated to With</li> <li>QA.</li> </ul> </li> <li>If Yes and QA is <ul> <li>non-blocking, QA</li> <li>task generated and</li> <li>assigned to QA's in</li> <li>Team, Status is</li> <li>updated to Pending</li> <li>closure and</li> <li>Pending closure</li> <li>email is sent to</li> <li>requestor.</li> </ul> </li> <li>If QA is not needed, status is updated to</li> <li>Pending closure</li> <li>and Pending</li> <li>closure amil is sent to</li> <li>requestor.</li> </ul>	Pending Closure/With QA	Reason is required in case of the restanting closifies the shares the served.
Send to Team Leader	Sends the case to the team leader	With Team Lead	

Action Name	Result	Case status changes to	Comments
Back to Team Member	Sends the case back to the assigned team member	Ready for Processing	Use only when the status is With Team Leader
Send to SME	Assigns the case to the selected SME	With SME	To assign the case to an SME, the SME must exist in the team.
Return to Processor	Returns the case from SME to the user who has sent the case to SME	SME Responded	Use only when the status is With SME
Return to Team	Returns the case from SME to the team	SME Responded	Use only when the status is With SME
Complete Task	Marks the task as complete when approved	Ready for Processing	

# System Action Buttons

On this tab of configuration page, you can configure the display of New Email, New Request, and New Comment system action buttons on Case details page.

#### IMPORTANT

**Starting from V3.4**, this option is no longer available under Configuration Sets as the Cora OpsManager uses Conversations component from the Cora SeQuence.

## System Actions Reason

On this tab of configuration page, you can configure the following system actions that appear for a case in all statuses (except of indexing phase). These actions are supported with reasons.

- Send email
- New request
- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Sends an email outside of Cora OpsManager	Awaiting response	When a response is received the status changes to Response Received.
New Request	Sends a task to another team in Cora OpsManager	Internal Request	Once a response is received the status changes to internal Request Response Received.

Action Name	Result	Case status changes to	Comments
QA Passed	Updates QA result to pass	If OA blocking, Status updated to Pending If OA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If OA blocking, status updated to Audit If OA hot blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
Reject (In Indexing task)	Closes the case	Rejected	

#### New email reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, if you want to change the status of the case to Pending Closure (instead of Awaiting Response), select the Set Pending Close check box.

#### New request reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- If you want that a specific reason should change the status of the case to Pending Closure (instead of Internal Request), you should select the Set Pending Close check box.

#### Reject (In indexing task) reasons

Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the Send Reject Email check box).

### NOTE

- If no reasons are configured for a Set, the reject button will not appear in the indexing task.
- When a case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

#### QA failed reasons

Add reasons for Fail action.

#### NOTE

Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

#### **Email Templates**

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates are presented to the operator in the new email window of the case, on clicking Choose Email Template.

## Statuses for Target Date Extension

On this tab, add statuses for configuration sets, which may lead to target date extension. As the case enters these statuses the target date font will change to italics, once the case goes out from the status the system will extend the target date according to working hours that were "missed".

You can use "Apply to all config set" option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

# QC Settings

On this tab, add the QC stage settings. Following are the settings made here:

- % Cases to Sample: Percentage of cases that will be sent to QC.
- % Accuracy to Enable Pass: Minimum accuracy percentage required to pass the QC stage.
- QC Questions to Display: Questions that will be part of the QC form.

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ß	OPS MANAGER ADMIN	Configuration Sets	
+ & `	General Settings Label Settings Target Date Calculatio	Case Category Case Type Case Sub Type	•
0) 1)	Categories		
<u>,</u> , B	Sub Types Category-Role Associa	Details     SME SLA     Reminders     Actions     System Actions Reasons     Email Templates     Statuses for Target Date Extension     QC Settings	
Ж,	Configuration Sets	% Cases to Sample 65	
0⊣□ □+0	Email Templates Manage User Groups	% Accuracy to Enable Pass 35 QC Questions to Display	
	Conditional Formatting	+ Add new record	🗘 Refresh
	Reports	Question	
	Mailbox	Question:	
		Insert Cancel No records to display.	

Click Insert to save the question, or click Cancel to discard.

The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three as an answer and add comments in the end. Based on the number of questions answered correctly and question weightage the accuracy score is calculated.

Conversation	s Audit Log	Attachments	Linked Cases	QC Parameters
Travel Docum	ents Submitted?			
	Check Verified?			
• Yes				
Is claim appro				
	l documented? No NA			
Checklist upd	ated?			
• Yes				
Comment	Approved!!			Accuracy %

# V3.2

As a Power user, you can define the properties for a Configuration Set on the Configuration Sets page.

On Flowtime, go to **Ops Manager > Ops Manager Admin > Configuration Sets**.

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2	OPS MANAGER ADMIN	Configuration Sets							
+ & , ,	General Settings Label Settings Target Date Calculatio	Case Category All	Ŧ	Case Type		Ŧ	Case Sub Type All		•
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 ⊗	Configuration Sets Email Templates	Set Name OverSet		Case Creation Template		•	Pending Closure Template Thanks for reaching us		•

# Details

On this tab, add details of the Config Set:

Field Name	Description
Set Name	To display the unique name of the Config Set. Default name displayed is the chosen configuration set, Category > Type > Sub Type.
Case Creation Template	To display the list email ids defined in Email Templates section. The chosen email Id will be the default for new case created email notifications for the config set.
Client Properties View	Create a workflow, and an activity that will hold the custom views. For details on how to do that, see this article.

Field Name	Description			
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Message Response Time	To define the time by which a reply needs to be sent for the email message received for a config set. To understand how Cora OpsManager configures the message response time, see this article.			
Message Response Time Unit	<ul> <li>To define the unit in which response time is considered.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Week</li> <li>Month</li> <li>Business Day</li> <li>Hours from start of the working day</li> </ul>			
ТАТ	To define the turnaround time for the case. This is the time allowed to solve the cases of this config set. To understand how Cora OpsManager calculates the target date, see this article.			
TAT Unit	<ul> <li>To choose the unit in which TAT is calculated.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Business Day</li> <li>Week</li> <li>Month</li> <li>Hours from start of the working day</li> </ul>			
Priority Specific TATs	<ul> <li>To define the case TAT based on the changed priority (If default priority is changed).</li> <li>Columns in the grid: <ul> <li>Priority</li> <li>TAT</li> <li>TAT Unit</li> <li>Ignore Cut Off (start calculating the TAT regardless of the time the case is received)</li> </ul> </li> </ul>			

# SME SLA

For each priority, you can set an SLA for SME. When an operator sends the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

# Reminders

A Reminder is sent for an email id when no response is received after a set number of days. You can set a maximum of three reminders for each config set, and decide after how many days each reminder will be sent.

Once the case is closed, the reminders will not be sent anymore.

Select the Include message in the reminder check box to include the original message to the reminder mail.

## Actions

The Actions for a Config Set are defined as per Case status.

When the Case reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

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Actions available out of the box:

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Make Available	Makes a case available for processing	Beady for Processing The status that was previous to in Hold except when the status was with except a watting cosure/on Hold In such case, the status will change to the status that was previous to those statuses.	It is recommended to add Make Available action for Vertex Available action for Pergense, Applicat Pergense received Pergense received received, internatirequest received, internatirequest Approval cycle rejected.
Close	Closes a case	Closed	Skips Pending Closure and Kis recommended to add Close action when the Case status is Pending Case ta Lis Response Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing

Action Name	Result	Case status changes to	Comments
Pending Closure	<ul> <li>Checks if QA is needed</li> <li>If Yes and QA is blocking, QA task generated and assigned to QA's in Team. Status is updated to With QA.</li> <li>If Yes and QA is non-blocking, QA task generated and assigned to QA's in Team, Status is updated to Pending closure and Pending closure email is sent to requestor.</li> <li>If QA is not needed, status is updated to Pending closure and Pending closure email is sent to requestor.</li> </ul>	Pending Closure/With QA	Reason is required received affer Pending changes to Pending lossified Response Received.
Send to Team Leader	Sends the case to the team leader	With Team Lead	
Back to Team Member	Sends the case back to the assigned team member	Ready for Processing	Use only when the status is With Team Leader
Send to SME	Assigns the case to the selected SME	With SME	To assign the case to an SME, the SME must exist in the team.
Return to Processor	Returns the case from SME to the user who has sent the case to SME	SME Responded	Use only when the status is With SME
Return to Team	Returns the case from SME to the team	SME Responded	Use only when the status is With SME
Complete Task	Marks the task as complete when approved	Ready for Processing	

# System Action Buttons

On this tab of configuration page, you can configure the display of New Email, New Request, and New

Comment system action buttons on Case details page.

# System Actions Reason

On this tab of configuration page, you can configure the following system actions that appear for a case in all statuses (except of indexing phase). These actions are supported with reasons.

- Send email
- New request
- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Sends an email outside of Cora OpsManager	Awaiting response	When a response is received the status changes to Response Received.
New Request	Sends a task to another team In Cora OpsManager	Internal Request	Once a response is received the status changes to internal Request Response Received.
QA Passed	Updates QA result to pass	If OA blocking, Status updated to Pending If OA not blocking, the case status remains Pending Closure.	Presented only when the status is with QA.
QA Failed	Updates QA result to fail	If OA blocking, status updated to Audit If OA hot blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
Reject (In indexing task)	Closes the case	Rejected	

#### New email reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, if you want to change the status of the case to Pending Closure (instead of Awaiting Response), select the Set Pending Close check box.

#### New request reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- If you want that a specific reason should change the status of the case to Pending Closure (instead of Internal Request), you should select the Set Pending Close check box.

## Reject (In indexing task) reasons

Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the Send Reject Email check box).

## NOTE

• If no reasons are configured for a Set, the reject button will not appear in the indexing task.

• When a case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

#### QA failed reasons

Add reasons for Fail action.

## NOTE

Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

# **Email Templates**

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates are presented to the operator in the new email window of the case, on clicking Choose Email Template.

# Statuses for Target Date Extension

On this tab, add statuses for configuration sets, which may lead to target date extension. As the case enters these statuses the target date font will change to italics, once the case goes out from the status the system will extend the target date according to working hours that were "missed".

You can use "Apply to all config set" option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

# QC Settings

On this tab, add the QC stage settings. Following are the settings made here:

- % Cases to Sample: Percentage of cases that will be sent to QC.
- % Accuracy to Enable Pass: Minimum accuracy percentage required to pass the QC stage.
- QC Questions to Display: Questions that will be part of the QC form.

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	General Settings Label Settings Target Date Calculatio Categories	Case Category All			T	Case Type All		¥	Case Sub	Туре	Ţ
	Types Sub Types	Details SME SLA	Reminders	Actions	System Act	tions Reasons	Email Templates	Statuses for Ta	rget Date Extension	QC Settings	
G	Category-Role Associa	Section S SIME SEA	The state of the s	, 100010	oyotem Ad		entair templates		get bate Extension	QU OCTUNIS	
Ж,	Configuration Sets	% Cases to Sample	65								
O→□ □+O	Email Templates Manage User Groups	% Accuracy to Enable F QC Questions to Displa									
	Conditional Formatting	+ Add new record									🗘 Refresh
	Reports	Question									
	Mailbox	Question:									
		Insert Cancel No records to display.									

Click Insert to save the question, or click Cancel to discard.

The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three radio buttons as an answer and add comments in the end. Based on the number of questions answered correctly the accuracy level is calculated.

Conversations	Audit Log	Attachments	Linked Cases	QC Parameters
Travel Documents <ul> <li>Yes</li> <li>No</li> </ul>				
Background Checl	Verified?			
Yes No     No     Is claim approved:				
Yes     No				
Peer approval doo				
Checklist updated				
	oved!!			Accuracy %
Comment				100

# V3.0

The properties for a Config Set are defined on various tabs on the Configuration Sets page.

onfiguration Sets				
Case Category	Case Type		Case Sub Type	
All	▼ All	•	All	*
etails SME SLA Reminder	rs Actions System Actions Reas	ons Email Templates Statuses for Targ	get Date Extension QC Settings	

# Details

On this tab, add details of the Config Set:

Field Name	Description
Set Name	To display the unique name of the Config Set. Default name displayed is the chosen configuration set, Category > Type > Sub Type.
Case Creation Template	To display the list email ids defined in Email Templates section. The chosen email Id will be the default for new case created email notifications for the config set.
Client Properties View	Create a workflow, and an activity that will hold the custom views. For details on how to do that, see the related article, Create Client Properties View.
Case Priority	To define priority of a case. The available out of the box priorities are High, Medium, Low, and Standard.
Is Indexing Required?	To select if the case will go to indexing regardless the input channel definition.
ТАТ	To define the turnaround time for the case. This is the time allowed to solve the cases of this config set. To understand how Cora OpsManager calculates the target date, see the related article, Target Date Calculation.
TAT Unit	<ul> <li>To choose the unit in which TAT is calculated.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Business Day</li> <li>Week</li> <li>Month</li> <li>Hours from start of the working day</li> </ul>

Field Name	Description
Priority Specific TATs	<ul> <li>To define the case TAT based on the changed priority (If default priority is changed).</li> <li>Columns in the grid: <ul> <li>Priority</li> <li>TAT</li> <li>TAT</li> <li>TAT Unit</li> <li>Ignore Cut Off (start calculating the TAT regardless of the time the case is received)</li> </ul> </li> </ul>

# SME SLA

For each priority, you can set an SLA for SME. When an operator sends the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

# Reminders

A Reminder is sent for an email id when no response is received after a set number of days. You can set a maximum of three reminders for each config set, and decide after how many days each reminder will be sent.

Once the case is closed, the reminders will not be sent anymore.

Select the Include message in the reminder check box to include the original message to the reminder mail.

# Actions

The Actions for a Config Set are defined as per Case status.

When the Case reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

Some actions require reasons, and so the **Manage Reasons** button appears for these actions. You must add at least one reason for such actions. Each reason is a *hierarchic tree field* that allows you to type the reason in preferred languages.

Actions available out of the box:

Action Name	Result	Case status changes to	Comments
On Hold	Puts the case on hold Reason is required	On Hold	Add Make Available for On Hold action

Action Name	Result	Case status changes to	Comments
Send Approval Email	Generates PDF summary of a case and allows user to send email for external approval.	Awaiting Approval	The Subject of the email will have the keyword [Approval]. On receiving the approval response, the case status changes to Response Received.
Make Available	Makes a case available for processing	Ready for Processing The status that was beyous for the status was with the status was with the status was conserved and the cosure of the status will change to the status to those statuses.	It is recommended to add Male Addie action for Child A Addie action for Pending Costi e response received, internati equest Approval cycle rejected.
Close	Closes a case	Closed	Skips Pending Closure and Das recommended to add Close action when the case status is Pending Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	<ul> <li>Checks if QA is needed <ul> <li>If Yes and QA is</li> <li>blocking, QA task</li> <li>generated and</li> <li>assigned to QA's in</li> <li>Team. Status is</li> <li>updated to With</li> <li>QA.</li> </ul> </li> <li>If Yes and QA is <ul> <li>non-blocking, QA</li> <li>task generated and</li> <li>assigned to QA's in</li> <li>Team, Status is</li> <li>updated to Pending</li> <li>closure and</li> <li>Pending closure</li> <li>email is sent to</li> <li>requestor.</li> </ul> </li> <li>If QA is not needed, status is updated to</li> <li>Pending closure</li> <li>and Pending</li> <li>closure amil is sent to</li> <li>requestor.</li> </ul>	Pending Closure/With QA	Reason is required in case of the restanting closifies the shares the shares received.
Send to Team Leader	Sends the case to the team leader	With Team Lead	

Action Name	Result	Case status changes to	Comments
Back to Team Member	Sends the case back to the assigned team member	Ready for Processing	Use only when the status is With Team Leader
Send to SME	Assigns the case to the selected SME	With SME	To assign the case to an SME, the SME must exist in the team.
SME Return to Processor	Returns the case to the user who has sent the case to SME	SME Responded	Use only when the status is With SME
SME Return to Team	Returns the case to the team	SME Responded	Use only when the status is With SME

## System Actions Reason

On this tab of configuration page, system actions are configured. These actions are supported with reasons.

The following are the system actions that appear for a case in all statuses (except of indexing phase):

- Send email
- New request
- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Sends an email outside of Cora OpsManager	Awaiting response	When a response is received the status changes to Response Received.
New Request	Sends a task to another team in Cora OpsManager	Internal Request	Once a response is received the status changes to Internal Request Response Received.
QA Passed	Updates QA result to pass	If OA blocking, Status updated to Pending If OA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If OA blocking, status updated to Audit If OA hot blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
Reject (In Indexing task)	Closes the case	Rejected	

### New Email Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, if you want to change the status of the case to Pending Closure (instead of Awaiting Response), select the Set Pending Close check box.

#### New Request Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- If you want that a specific reason should change the status of the case to Pending Closure (instead of Internal Request), you should select the Set Pending Close check box.

#### Reject (In indexing task) Reasons

Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the Send Reject Email check box).

#### NOTE

- If no reasons are configured for a Set, the reject button will not appear in the indexing task.
- When a case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

#### **QA Failed Reasons**

Add reasons for Fail action.

#### NOTE

Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

#### **Email Templates**

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates are presented to the operator in the new email window of the case, on clicking Choose Email Template.

## Statuses for Target Date Extension

On this tab, add statuses for configuration sets, which may lead to target date extension. As the case enters these statuses the target date font will change to italics, once the case goes out from the status the system will extend the target date according to working hours that were "missed".

You can use "Apply to all config set" option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

## **QC Settings**

On this tab, add the QC stage settings. Following are the settings made here:

- % Cases to Sample: Percentage of cases that will be sent to QC.
- % Accuracy to Enable Pass: Minimum accuracy percentage required to pass the QC stage.
- QC Questions to Display: Questions that will be part of the QC form.

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ů,	Types Sub Types Category-Role Associa	Details SME SLA Reminders Actions System Actions Reasons Email	Templates Statuses for Target Date Extension QC Settings
 <u>≫</u> ₽₽	Configuration Sets Email Templates	% Cases to Sample 65 % Accuracy to Enable Pass 35	
	Manage User Groups Conditional Formatting	QC Questions to Display + Add new record	Refresh
	Reports Mailbox	Question Question:	
		Insert Cancel No records to display.	

Click Insert to save the question, or click Cancel to discard.

The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three radio buttons as an answer and add comments in the end. Based on the number of questions answered correctly the accuracy level is calculated.

Conversations	Audit Log	Attachments	Linked Cases	QC Parameters
Travel Documen				
Background Che	eck Verified?			
Yes     N     Is claim approve				
Yes     N				
Peer approval d				
Checklist update				
	pproved!!			Accuracy %
Comment				100

# Previous to V3.0

The properties for a Config Set are defined on various tabs on the Configuration Sets page.

Conditional Forn	atting   Reports   Ma	ilbox			
Case Category		Case Type		Case Sub Type	
All	•	All	•	All	•

# Details

On this tab, add details of the Config Set:

Field name	Description
Set Name	Text box, to display the unique name of the Config Set. Default name displayed is the chosen configuration set, Category > Type > Sub Type.
Case Creation Template	Drop-down list, to display the list email ids defined in Email Templates section. The chosen email id will be the default for new case created email notifications for the config set.
Client Properties View	<ul> <li>Text box, to display the view chosen for the config set.</li> <li>The fields from the view appear in the properties section of the Case created With finits comfig Set.</li> <li>The view name is available at:</li> <li>Workflow &gt; Customizations &gt; Views &gt; ICM Customizable view &gt; Client properties View.</li> <li>Inside client properties views, create two views: <ul> <li>View: refers to the name of the view.</li> <li>ViewRO (no space!): refers to the name of the read only view.</li> </ul> </li> <li>To create a new view, duplicate the Test view, which has the style guideline for this form.</li> </ul>
Case Priority	Drop-down list, to define priority of a case. The available out of the box priorities are High, Medium, Low, and Standard.
Is Indexing Required?	Check box, to select if the case will go to indexing regardless the input channel definition.

Field name	Description
ТАТ	Text box, to define turnaround time for the case. This is the time allowed to solve cases of this config set. To understand how Cora OpsManager calculates the target date, see the related article, larget Date Calculation.
TAT Unit	<ul> <li>Drop-down list, to choose the unit in which TAT is calculated.</li> <li>Hour (business hours)</li> <li>Day</li> <li>Business Day</li> <li>Week</li> <li>Month</li> <li>Hours from start of working day</li> </ul>
Priority Specific TATs	<ul> <li>Grid, to define the case TAT based on the changed priority (if default priority is</li> <li>Columns in the grid: <ul> <li>Priority</li> <li>TAT</li> <li>TAT Unit</li> <li>Ignore Cut Off (start calculating the TAT regardless of the time the case is received).</li> </ul> </li> </ul>

# SME SLA

For each priority, you can set an SLA for SME. When an operator sends the case to SME, he will be able to select the priority in the Send to SME window (in case you added SME SLA to the config set). The SME will be able to see his target date for the response in the query line on the conversation tab.

## Reminders

A Reminder is sent for an email id when no response is received after a set number of days. You can set a maximum of three reminders for each config set, and decide after how many days each reminder will be sent.

Once the case is closed, the reminders will not be sent anymore.

Select the Include message in the reminder check box to include the original message to the reminder mail.

## Actions

The Actions for a Config Set are defined as per Case status.

When the Case reaches a status, the defined actions (for that status) become available for the Case under Actions section on Case page.

Some actions require reasons, and therefore Manage Reasons button will appear for these actions. You must

add at least one reason for such actions. Each reason is a *hierarchic tree field* that allows you to type the reason in preferred languages.

Actions available out of the box:

Action Name	Result	Case status changes	Comments
On Hold	Puts the case on hold Reason is required	On Hold	Add Make Available for On Hold
올end Approval	Generates PDF summary TO Send email for external approvat.	Awaiting Approval	The Subject of the email will have [Approval in the subject. On receiving approval response, Response Received.
Make Available	Makes a case available for processing.	Ready for Processing Or The status that was present whether the present whether the status of the du present of the du status of the du status status of the the status of the the status of the the status of the status of the the status of t	It is recommended to add Make Awalding response received, hosing response received, hosing response received, hosing response received, referied, and Approval cycle
Close	Closes a Case	Closed	Skips Pending Closure and QA for a case. It is recommended to add Close Sending Closure - Response Received.
Reject	Closes a Case	Rejected	Rejects a case without further processing.

Action Name	Result	Case status changes	Comments
Pending Closure	<ul> <li>Checks if QA is needed</li> <li>If Yes and QA is blocking, QA task generated and assigned to QA's in Team. Status is updated to With QA.</li> <li>If Yes and QA is non-blocking, QA task generated and assigned to QA's in Team, Status is updated to Pending closure and Pending closure email is sent to requestor.</li> <li>If QA is not needed, status is updated to Pending closure email pending closure email is sent to requestor.</li> </ul>	Banding Closure/with	Reason is required. In case the response is received response Received.
Send to Team Leader	Sends case to the team	With Team Lead	
Back to Team Member	Sends case back to	Ready for Processing	Use only when the status is With Team Leader.
Send to SME	Assigns case to the	With SME	ក្លាននុទ្ធថ្លារ គឺត្រែនទុកខ្លួនME, an SME
SME Return to	Returns cases to the user	SME Responded	Use only when the status is With SME.
SME Return to	Returns case to the team	SME Responded	Use only when the status is With SME.

# System Actions Reason

On this tab of configuration page, system actions are configured. These actions are supported with reasons.

The following are the system actions that appear for a case in all statuses (except of indexing phase):

- Send email
- New request
- New comment
- QA Pass or Fail
- Reject (in indexing task)

Action Name	Result	Case status changes to	Comments
New Email	Sends an email outside of Cora OpsManager	Awaiting response	When a response is received Response Received.
New Request	Sends a task to another OpsMahager	Internal Request	Once a response is received Ne staties for internal Request Response Received.
QA Passed	Updates QA result to pass	If QA blocking Status Epocie Closure. If QA not blocking, the case Closure.	Presented only when the status is with QA.
QA Failed	မြာ့dates QA result to	If QA blocking status Correction. If QA not blocking, the case Closure.	Presented only when the
Reject (In Indexing task)	Closes the case	Rejected	

## New Email Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- For a specific reason, if you want to change the status of the case to Pending Closure (instead of Awaiting Response), select the Set Pending Close check box.

#### New Request Reasons

- For each status, you need to create a record with a reason. If there are multiple reasons, you need to create a record for each reason.
- If you want that a specific reason should change the status of the case to Pending Closure (instead of Internal Request), you should select the Set Pending Close check box.

#### Reject (In indexing task) Reasons

Add reason, and for each reason you can choose to send a rejection email to the requester (by selecting the Send Reject Email check box).

- If no reasons are configured for a Set, the reject button will not appear in the indexing task.
- When a case is created via email, it contains only category and type. Hence, to have the reject button, you need to configure the reasons for set with category and type only.

### QA Failed Reasons

Add reasons for Fail action.

### NOTE:

Reason is mandatory for QA Fail. If there are no reasons, the QA Auditor will not be able to proceed with Fail action.

# **Email Templates**

On this tab of configuration page, choose email templates for the Config Set. The chosen email templates are presented to the operator in the new email window of the case, on clicking Choose Email Template.

# Statuses for Target Date Extension

On this tab, add statuses for configuration sets, which may lead to target date extension. As the case enters these statuses the target date font will change to italics, once the case goes out from the status the system will extend the target date according to working hours that were "missed".

You can use "Apply to all config set" option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

# QC Settings

On this tab, add the QC stage settings. Following are the settings made here:

- % Cases to Sample: Percentage of cases that will be sent to QC.
- % Accuracy to Enable Pass: Minimum accuracy percentage required to pass the QC stage.
- QC Questions to Display: Questions that will be part of the QC form.

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ps Manager Home		
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ases I Started	General Settings   Label Settings   Categories   Types   Sub Types   <b>Configuration Sets</b>   Email Templates   Manage User Groups   Conditional Formatting   Reports   Mailbox	
eports	Case Category Case Type Case Sub Type	
ps Manager Admin		-
	Details         SME SLA         Reminders         Actions         System Actions Reasons         Email Templates         Statuses for Target Date Extension         QC Settings	
	% Cases to Sample 65	
	% Accuracy to Enable Pass 35	
	QC Questions to Display	
	+ Add new record	n
	Question	
	Question:	
	Insert Cancel	
	Background check done? Delete Edit	it

Click Insert to save the question, or click Cancel to discard.

The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three radio buttons as an answer and add comments in the end. Based on the number of questions answered correctly the accuracy level is calculated.

Conversation	ns Audit Log	Attachments	Linked Cases	QC Parameters
Travel Docum	nents Submitted?			
• Yes	) No 🔿 NA			
	Check Verified?			
• Yes	No 🔿 NA			
Is claim appr				
• Yes	No NA			
	al documented?			
• Yes	No NA			
Checklist upo				
• Yes	No NA			
	Approved!!			Accuracy %
Comment				100