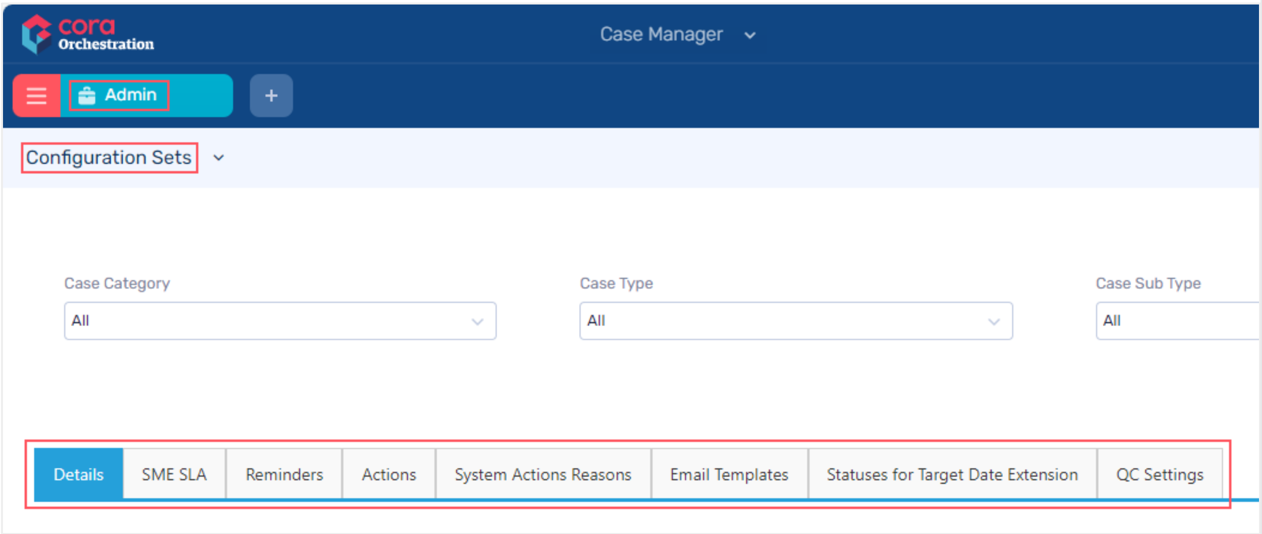
Add Configuration Set Properties

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**.



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.

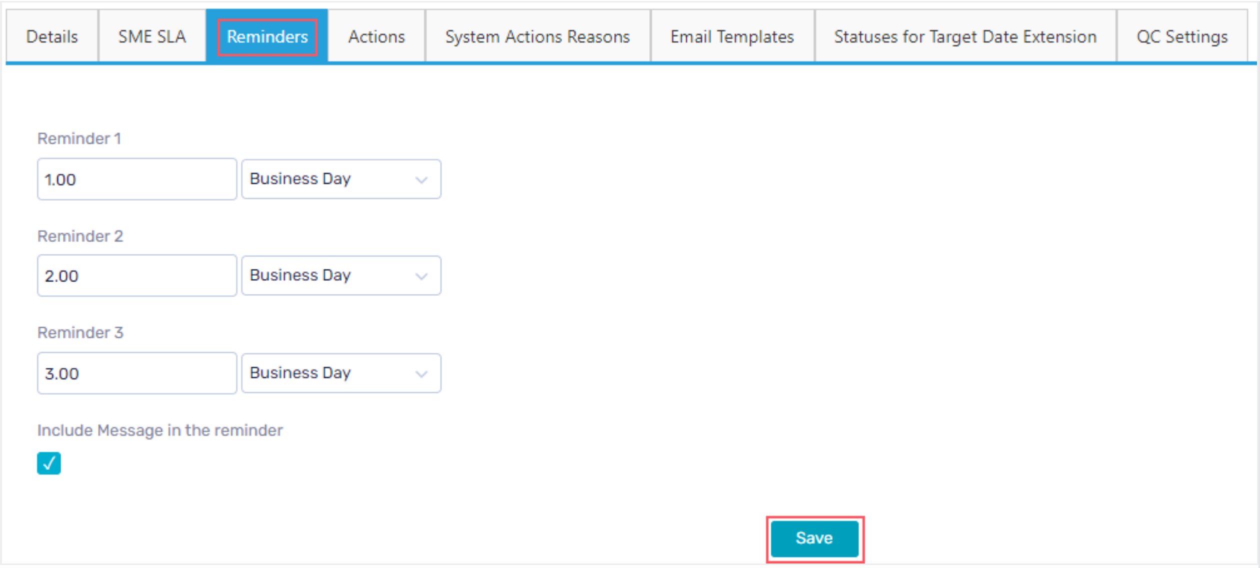
Field Name	Description
Message Response Time	To define the time by which a reply needs to be sent for the email message received for a config set. To understand how Cora OpsManager configures the message response time, see this article.
Message Response Time Unit	To define the unit in which response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

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.



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 Or The status that was previous to On Hold except when the status was With QA/Awaiting Response/Pending Closure/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 On hold.
Close	Closes a case	Closed	Skips Pending Closure and QA for a case. It is recommended to add Close action when the case status is Pending Closure – Response Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	Checks if QA is needed • If Yes and QA is blocking, QA task generated and assigned to QA's in Team. Status is updated to With QA. • 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. • If QA is not needed, status is updated to Pending closure and Pending closure email is sent to requestor.	Pending Closure/With QA	Reason is required. In case the response is received after Pending Closure, the status changes to Pending Closure – 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.

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 QA blocking, Status updated to Pending Closure. If QA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If QA blocking, status updated to Audit Correction. If QA 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”.

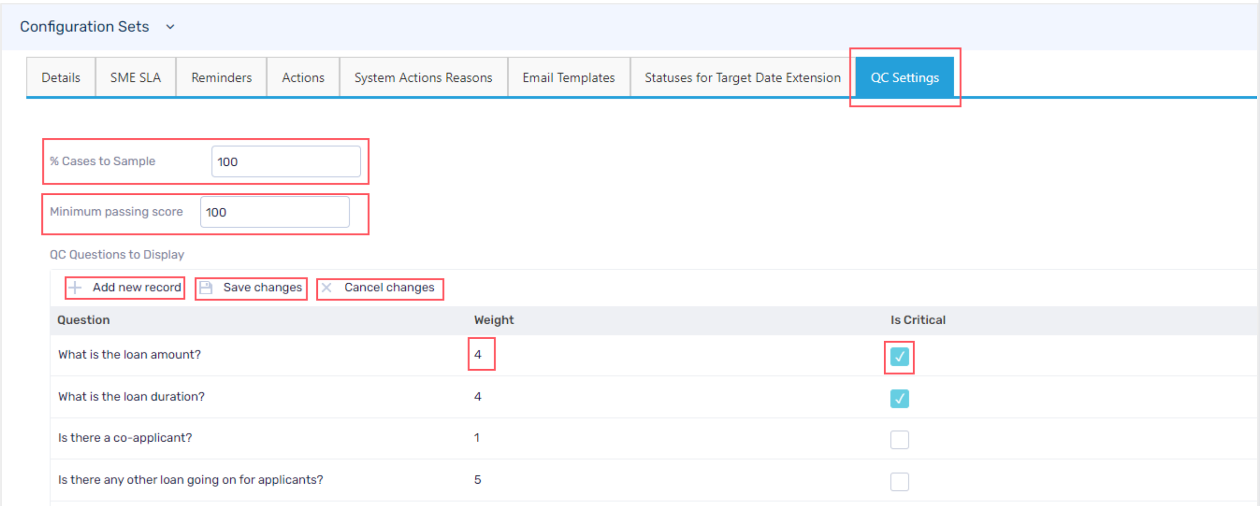
You can use “Apply to all config set” option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

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.



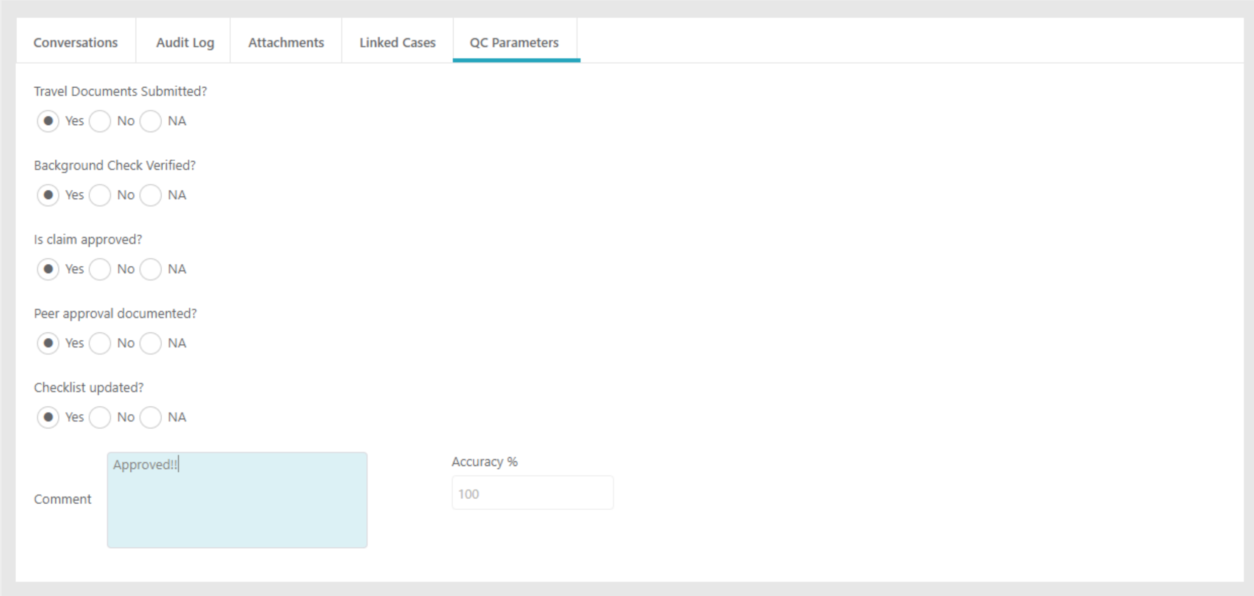
Click **Add new record** to add a new question. Click **Save changes** to save any updates made to the existing question. Click **Cancel changes** to discard the updates made to a question.

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.

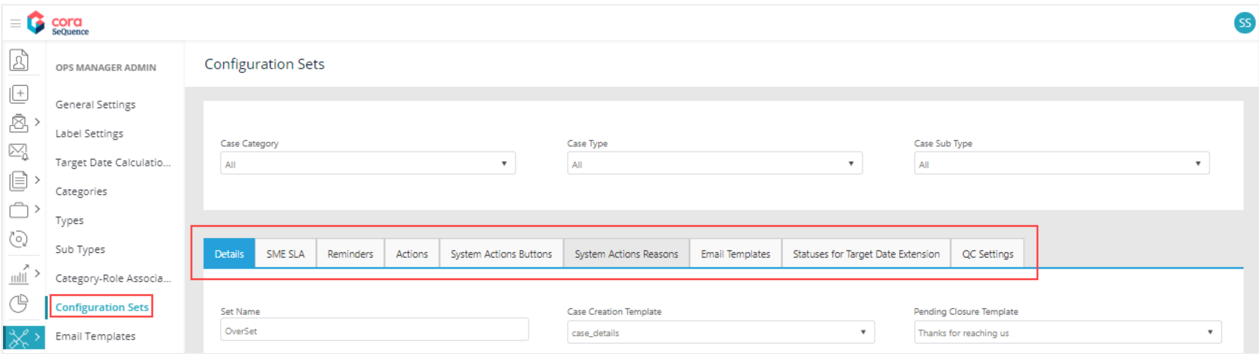
The questions added here are displayed in the QC form along with three options to answer, Yes, No, and NA. The QC auditor may select one of the three as an answer and add comments in the end. Based on the number of questions answered correctly and question weightage the accuracy score is calculated.



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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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	To define the unit in which response time is considered. • Hour (business hours) • Day • Week • Month • **Business Day** • Hours from start of the working day
TAT	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	To choose the unit in which TAT is calculated. • Hour (business hours) • Day • Business Day • Week • Month • Hours from start of the working day
Priority Specific TATs	To define the case TAT based on the changed priority (If default priority is changed). Columns in the grid: • Priority • TAT • TAT Unit • Ignore Cut Off (start calculating the TAT regardless of the time the case is received)

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

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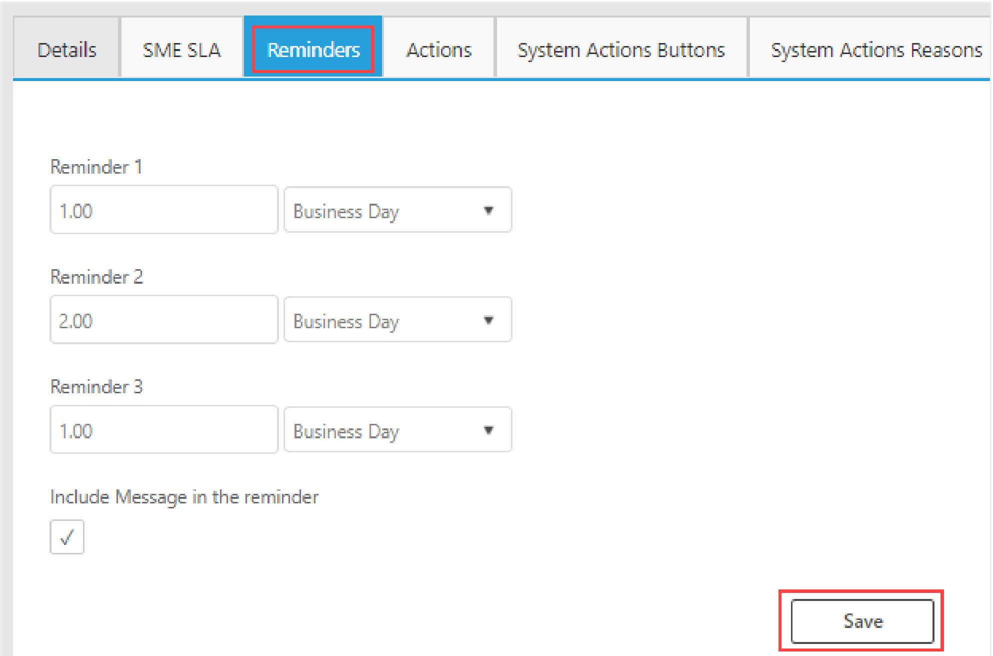

While sending an email, a Reminder Required check box appears in the email window. Selection of this check box decides the sending of email reminders.
For more details, see this article.

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:

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Action Name	Result	Case status changes to	Comments
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Make Available	Makes a case available for processing	Ready for Processing Or The status that was previous to On Hold except when the status was With QA/Awaiting Response/Pending Closure/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 On hold.
Close	Closes a case	Closed	Skips Pending Closure and QA for a case. It is recommended to add Close action when the case status is Pending Closure – Response Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	Checks if QA is needed • If Yes and QA is blocking, QA task generated and assigned to QA's in Team. Status is updated to With QA. • 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. • If QA is not needed, status is updated to Pending closure and Pending closure email is sent to requestor.	Pending Closure/With QA	Reason is required. In case the response is received after Pending Closure, the status changes to Pending Closure – Response 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.
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.

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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.

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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 QA blocking, Status updated to Pending Closure. If QA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If QA blocking, status updated to Audit Correction. If QA 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.

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.
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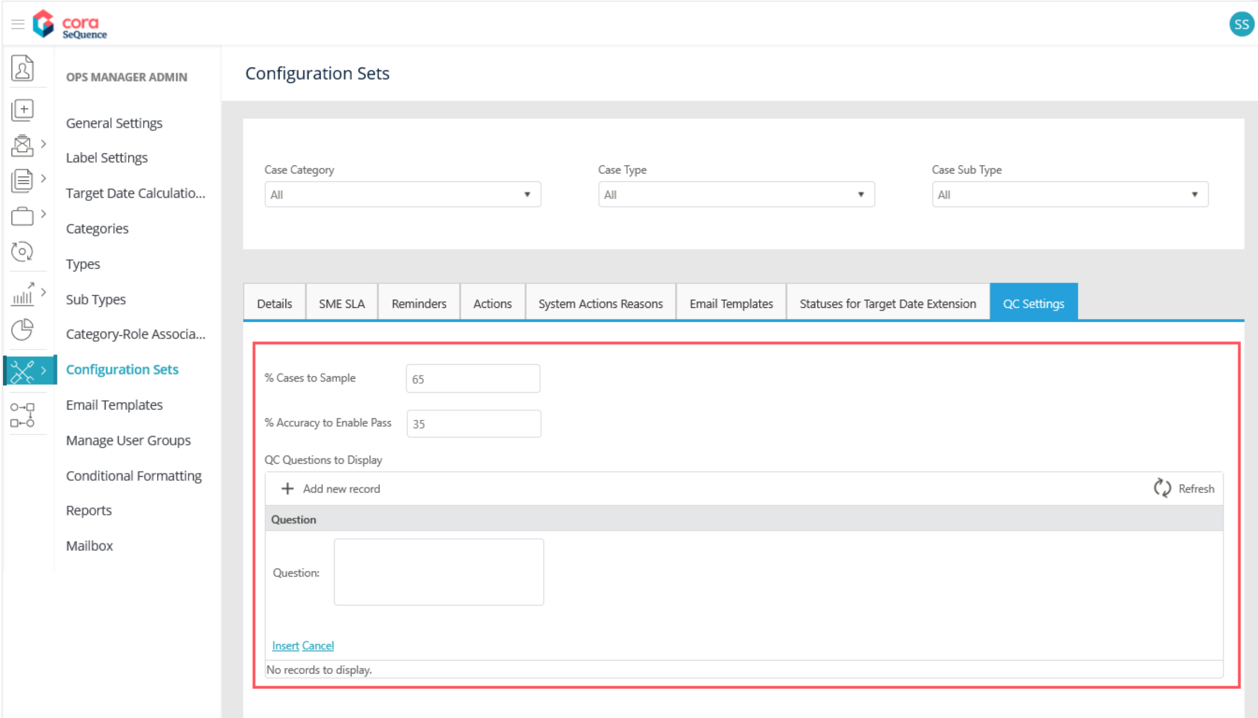
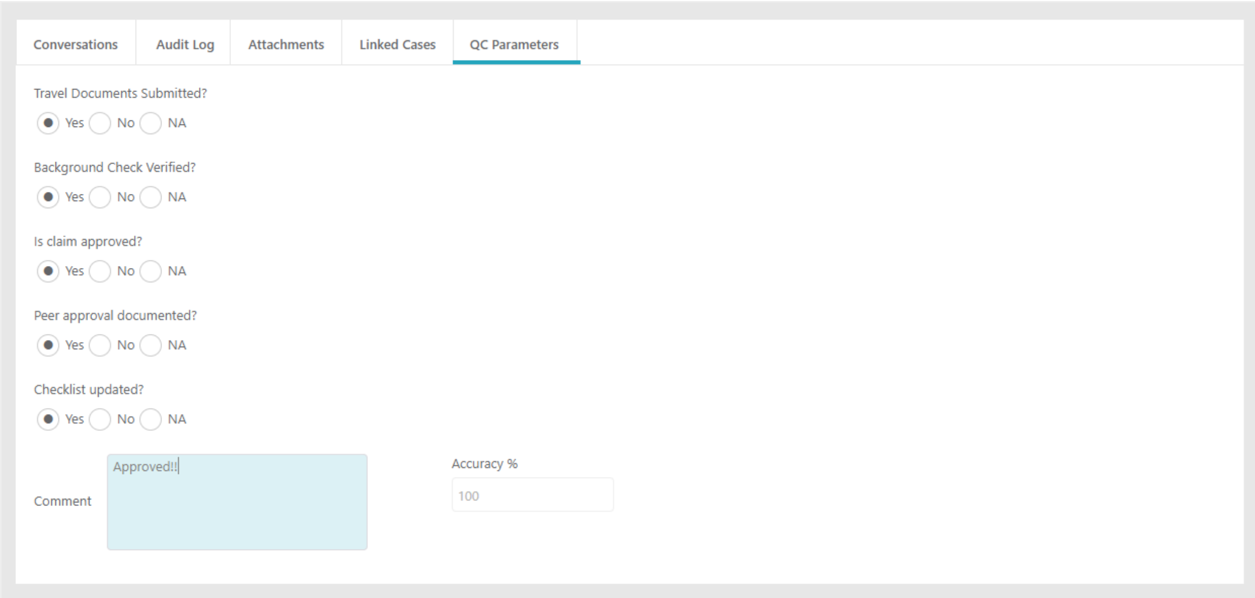


Click **Insert** to save the question, or click **Cancel** to discard.

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.



V3.2

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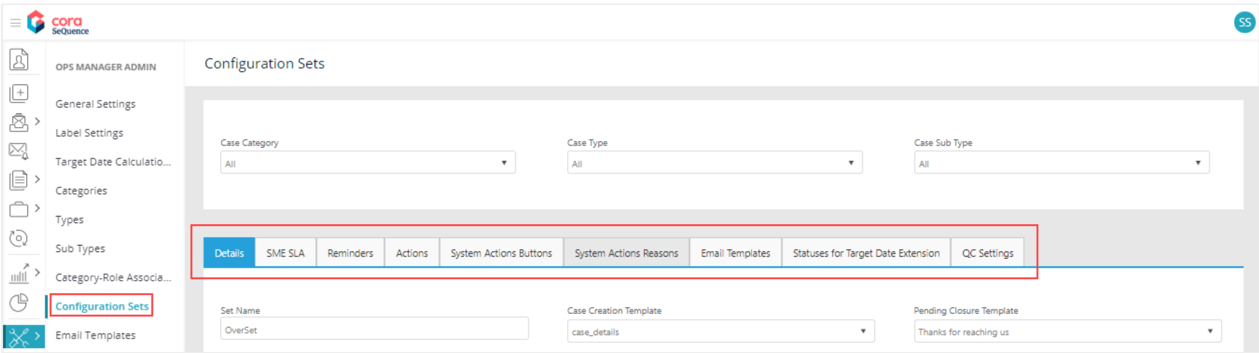

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Reminders

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.

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Close	Closes a case	Closed	Skips Pending Closure and QA for a case. It is recommended to add Close action when the case status is Pending Closure – Response Received.
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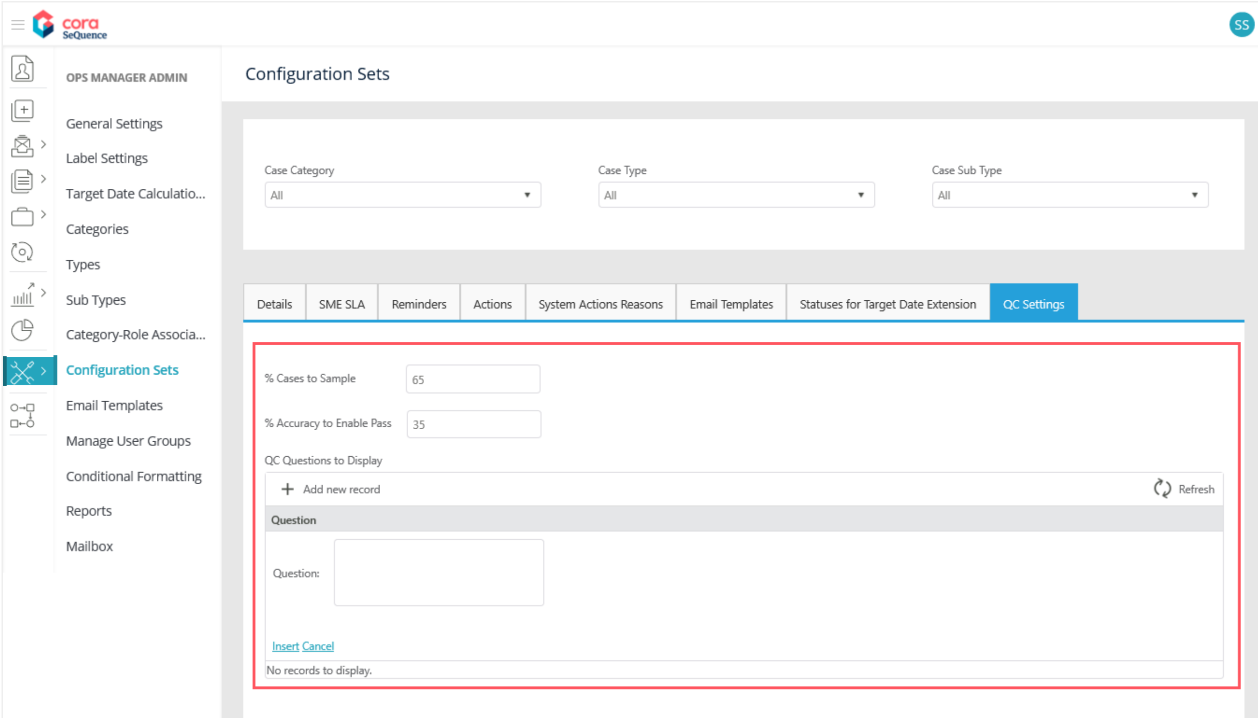
You can use “Apply to all config set” option while you are on All > All > All set. Clicking on this button, will apply the statuses for target date extension to all config sets.

QC Settings

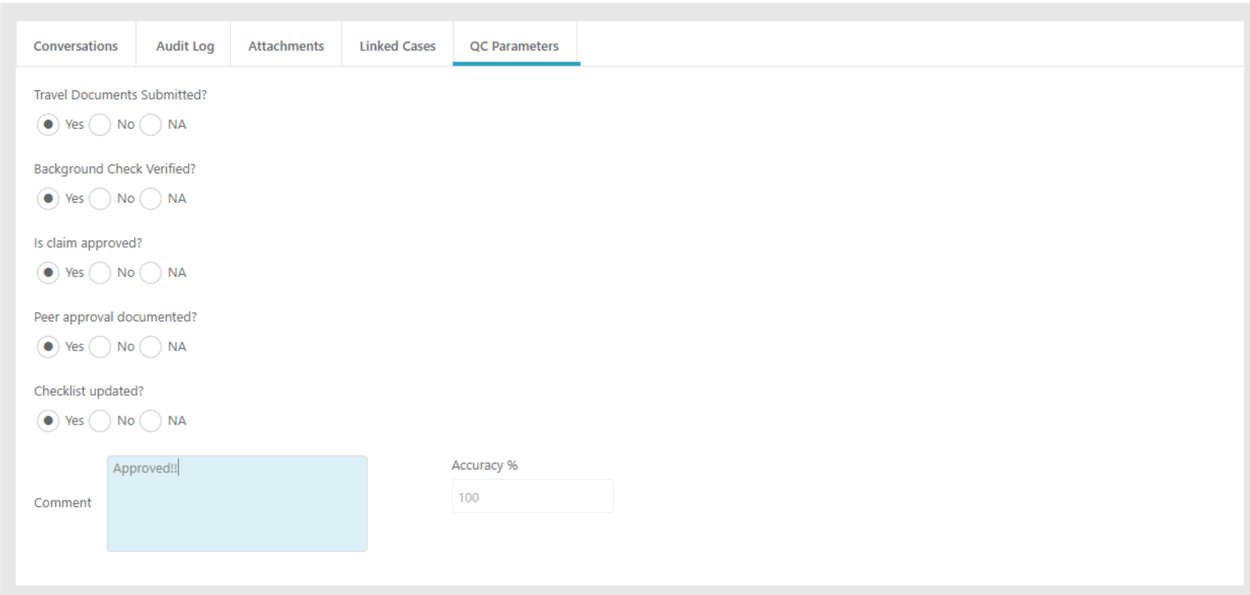
On this tab, add the QC stage settings. Following are the settings made here:

- % 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.



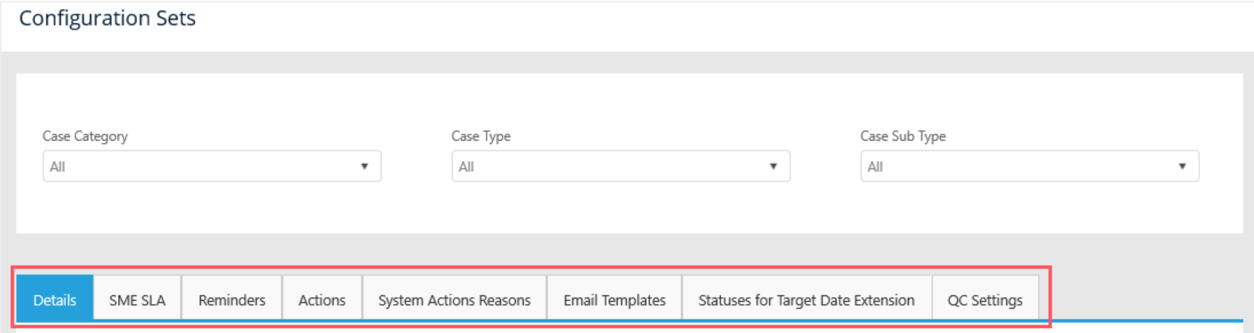
Click **Insert** to save the question, or click **Cancel** to discard.

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.



V3.0

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



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.
TAT	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	To choose the unit in which TAT is calculated. • Hour (business hours) • Day • Business Day • Week • Month • Hours from start of the working day

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

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 Or The status that was previous to On Hold except when the status was With QA/Awaiting Response/Pending Closure/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 On hold, Awaiting response, Approval response received, Pending closure response received, Internal request response received, and Approval cycle rejected.
Close	Closes a case	Closed	Skips Pending Closure and QA for a case. It is recommended to add Close action when the case status is Pending Closure – Response Received.
Reject	Closes a case	Rejected	Rejects a case, without further processing
Pending Closure	Checks if QA is needed • If Yes and QA is blocking, QA task generated and assigned to QA's in Team. Status is updated to With QA. • 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. • If QA is not needed, status is updated to Pending closure and Pending closure email is sent to requestor.	Pending Closure/With QA	Reason is required. In case the response is received after Pending Closure, the status changes to Pending Closure – Response 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 QA blocking, Status updated to Pending Closure. If QA not blocking, the case status remains Pending Closure.	Presented only when the status is With QA.
QA Failed	Updates QA result to fail	If QA blocking, status updated to Audit Correction. If QA 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.

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.
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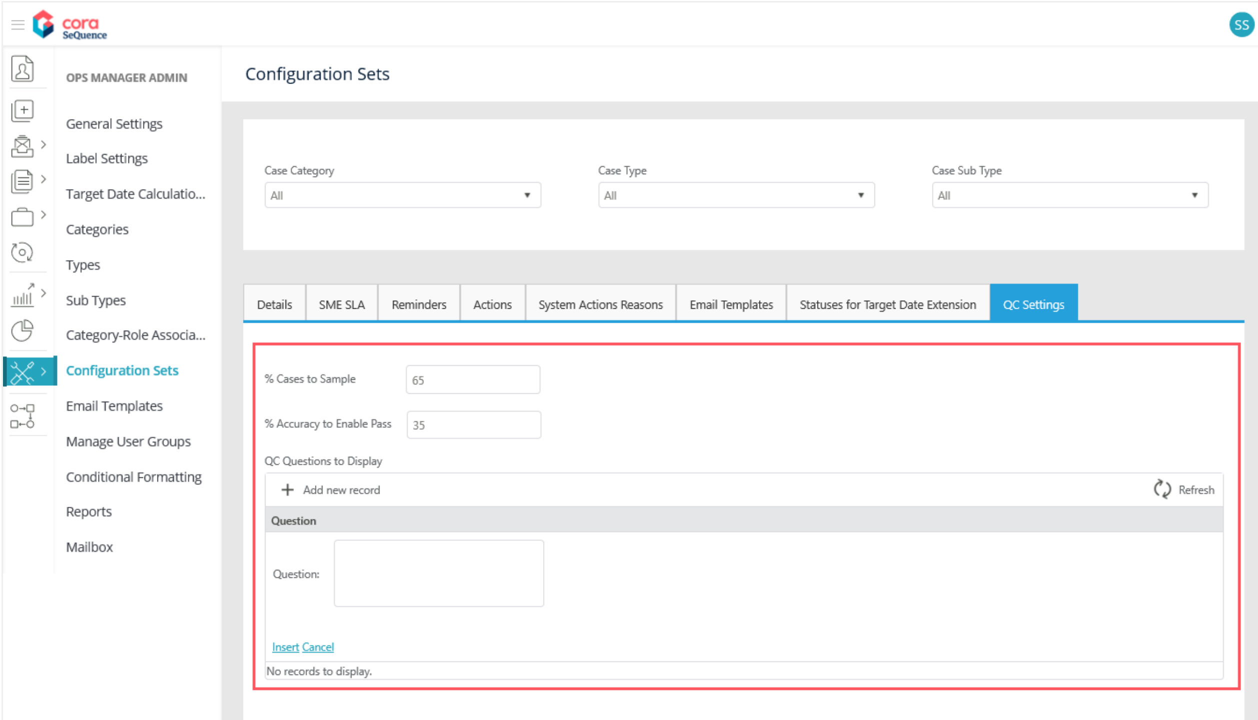
- QC Questions to Display: Questions that will be part of the QC form.



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

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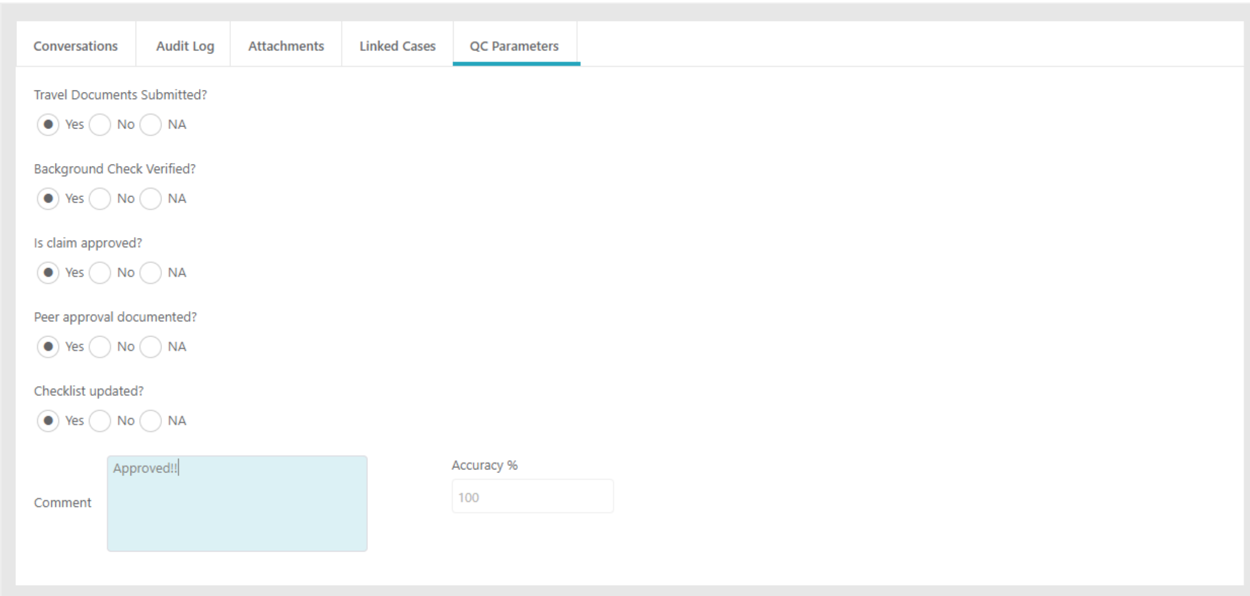

Previous to V3.0

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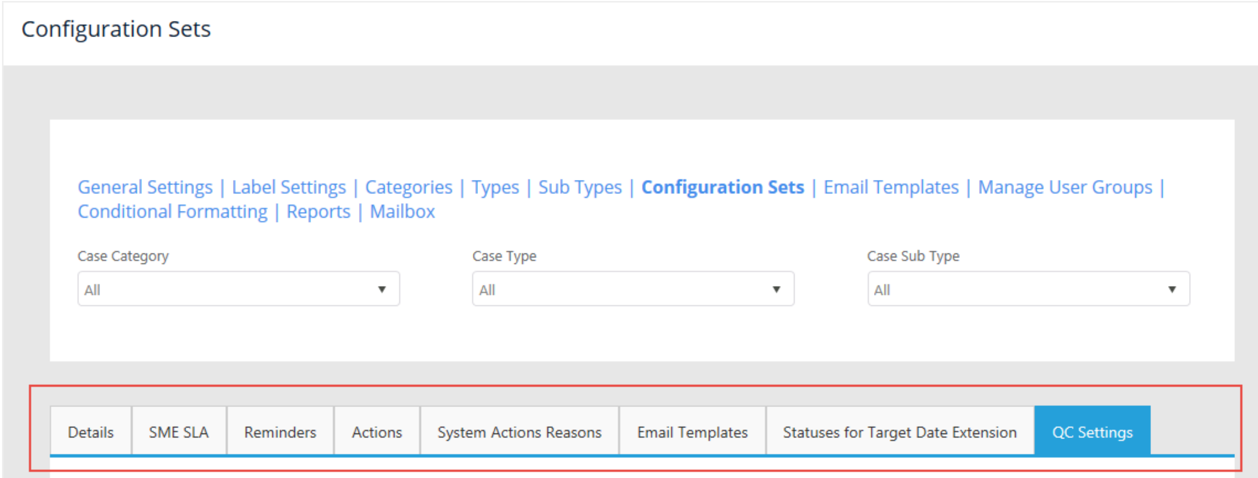

Details

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	Text box, to display the view chosen for the config set. The fields from the view appear in the properties section of the Case created with this config set. The view name is available at: Workflow > Customizations > Views > ICM Customizable view > Client properties view. Inside client properties views, create two views: • View: refers to the name of the view. • ViewRO (no space!): refers to the name of the read only view. To create a new view, duplicate the Test view, which has the style guideline for this form.
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
TAT	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, Target Date Calculation.
TAT Unit	Drop-down list, to choose the unit in which TAT is calculated. • Hour (business hours) • Day • Business Day • Week • Month • Hours from start of working day
Priority Specific TATs	Grid, to define the case TAT based on the changed priority (if default priority is changed). Columns in the grid: • Priority • TAT • TAT Unit • Ignore Cut Off (start calculating the TAT regardless of the time the case is received).

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.

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Action Name	Result	Case status changes to	Comments
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Send to Team Leader	Sends case to the team leader	With Team Lead	
Back to Team Member	Sends case back to assigned processor	Ready for Processing	Use only when the status is With Team Leader.
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SME Return to Processor	Returns case to the user who sent to SME	SME Responded	Use only when the status is With SME.
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New Email Reasons

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New Request Reasons

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- 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

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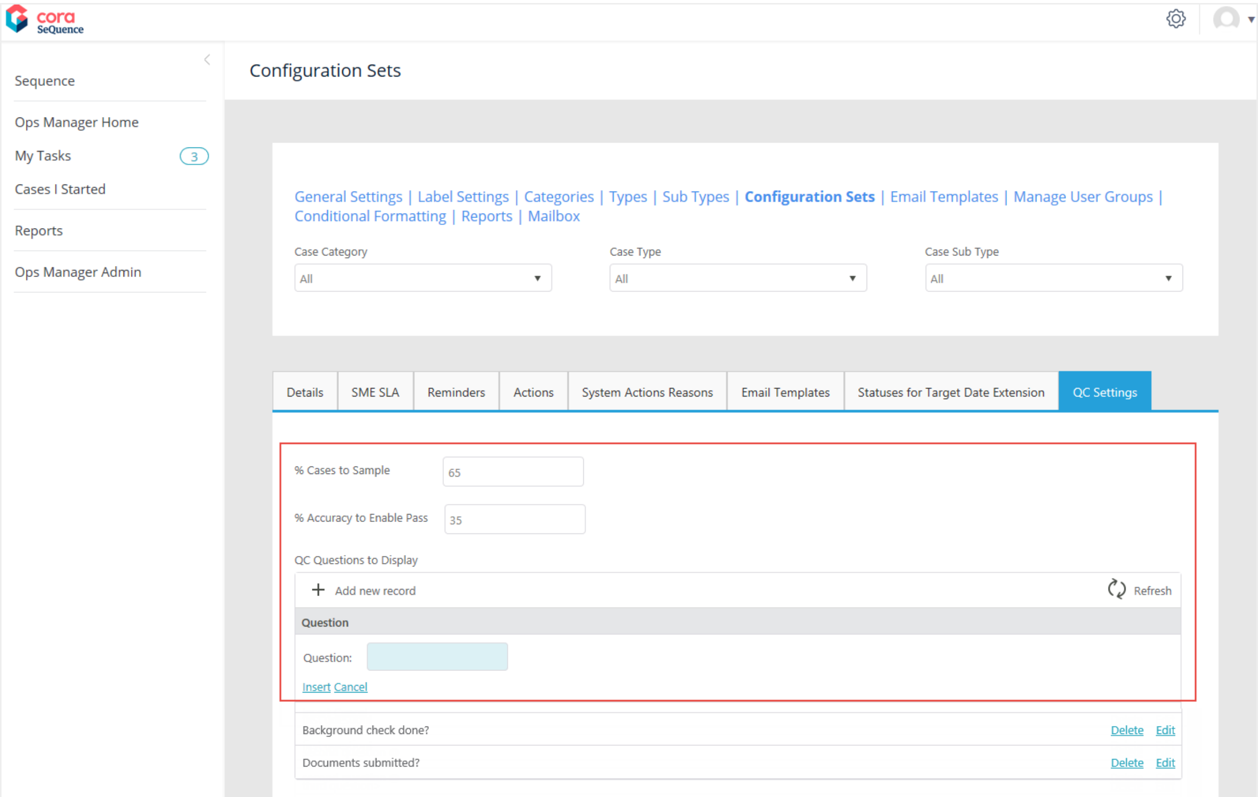

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