ROUTING

**what is routing ?**

Routing distributes work efficiently within an organization by determining the best user for the task based on skills, availability, and team.

**what is Assignment routing?**

When there is more than one operator to complete work on a case, you define who should do the work on each assignment as you model a process.

**what are the types of Routing and explain ?**

worklist - Only the assigned person completes the work.

For example---> an assignment that requires a human resources manager to approve employee time off requests routes to the worklist of the human resources manager.

Workqueue - Anyone from a group who have access to the queue can complete the work. Assignments stay in the work queue until a user associated with the work queue selects an assignment, or a manager sends an assignment in the work queue to a specific user.

For example---> when creating an expense report, an employee creates the report, a manager approves it, and payroll sends the money — three roles, either an individual or a team, are working on the same case to fulfill their part of the assigned work.

**what is workgroup ?**

A work group is made up of a manager, a work queue, and involves a cross-functional team. Operators in different business units can share tasks with operators of the same work group. You create work groups so that resources can be shared among units, divisions, or the entire organization.

**Define Work group manager?**

Work group managers : A manager must be identify for each work group. Managers can monitor, report, and access the work being performed by a group in the User Portal.

**how many routing options and explain with examples?**

There are 4 types :

**Explain current user with an example?**

Current user - The user who completed the previous assignment needs to complete the current task.

For example---> A customer who submits an order online and must select a shipping option.

**Explain Specific user with an example?**

Specific user - A specific individual user must complete the assignment.

For example---> A human resources manager who approves time off requests.

**Explain Workqueue with an example?**

Work queue - Anyone in a work group can complete the assignment.

For example---> An employee in the Benefits department who processes benefit changes

**Explain business logic with an example?**

Business logic - Based on certain conditions, common best practice.

For example---> In insurance underwriting, recreational vehicles (RVs) require special considerations. When prospective customers select the Are you insuring an RV? checkbox, the RVUnderwriters group work queue reviews the quote request. Otherwise, the quote request goes to the general Underwriting group work queue.

**Explain the Relationship between work group and work queue?**

A work queue is a shared workbasket containing assignments that operators with access, can open and process. The Accounting work group and the Onboarding work group each have their own work queue. Only operators in the work group can complete work from the respective work queue.

**ADVANCED ROUTING:**

There are two types of advanced routing

1. Pull Routing

2. Push Routing

**WHAT IS PULL ROUTING?**

\*It is a method of routing work items to users or work groups based on thier avaliability and willingness to take on new work.

\*Unless assigning a specific person to do it.Here the people in the work group have a flexibility to choose the work in which they are expetize in.

Example For Pull Routing:

Let us consider a Customer Service Application in that the customer can raise "n" no.of requests.

Let it be a Product Inquiry request. Here instead of assigning the work item directly to a specific person, it is placed in a common work queue for customer inquries.It holds all the product inquiry requests. So, the representative are flexible to access the work queue for customer inquiries, it contains all the details about the customer and the request, if the representative is skilled in that particular request then he choose it and therefore the case is completed.

**Advantages of Pull Routing:**

\*Empowers Customer Service Represtatives

\*WorkLoad Managment

\*Flexibility

\*Efficient Resource Allocation

**WHAT IS PUSH ROUTING?**

\*It is a method of routing work to specific user or work group based on predefined rules and conditions.Typicallt based on factors like Business rules, Workload distribution, Skill requirement.

\*It is routed to a person based on the condition we already configured.

Example For Push Routing:

Healthcare Patient Triage

In a healthcare setting, patient triage is a critical process where incoming patients need to be quickly assessed and assigned to the appropriate healthcare professionals based on their condition, urgency, and the availability of medical staff. Push routing in Pega can help automate and streamline this triage process.

Triage means sorting the people

--Patients arrive at a hospital or clinic and check in at the reception desk.

--The receptionist collects basic information from the patients,including thier name,symptoms and severity of thier condition.

--Pega is configured with push routing rules to automatically assign patients to the right healthcare professionals based on the following criteria:

\*Severity of the condition (e.g., critical, urgent, non-urgent).

\*Type of medical condition (e.g., cardiology, orthopedics, pediatrics).

\*Availability and expertise of healthcare staff (e.g., doctors, nurses).

--The system uses push routing to assign each patient to an available healthcare professional who has the appropriate expertise and workload capacity to handle the patient's case effectively.

--The assigned healthcare professional is alerted about the new patient assignment and can immediately attend to the patient.

**Advantages of Push Routing**:

\*Automation

\*Load Balancing

\*Consistency

**What are Push routing activities?**

There are four main categories of push routing activities

Skills-Based

• ToLeveledGroup

• ToSkilledGroup

• ToSkilledWorkbasket

Organization-Based

• ToWorkGroup

• ToWorkGroupManager

• ToOrgUnitManager

Common

• ToAssignedOperator

• ToCreateOperator

• ToCurrentOperator

• ToWorkParty

• ToNewWorkParty

• ToWorkbasket

• ToWorklist

Decision-Based

• ToDecisionMap

• ToDecisionTable

• ToDecisionTree

**Explain the difference between work group and work basket.**

Work group belongs to an organisation where as work basket belongs to unit in the organization.

Every work basket has a work group and every operator has a default work group and can be authorized manager of many work groups within the organization

**In Routing activity what is the default property used to route the object?**

pxRouteTo=Param.AssignTo =” work basket name” for work basket .s

For work list:

pxRouteTo =Param.Worklist=”true” && Param.AssignTo =” pxRequestor.pyUserIdentifier” for work list.

**How do you route the assignment to a specific user?**

Routing work to users | Route an assignment to a specific user

On the General tab, from the Route to drop-down, select Specific user , and verify the drop-down-list that follows defaults to User name .

**How do you route a case to a work queue in a PEGA?**

Routing an assignment to a work queue

In the Routing section, select Custom from the Route to list.

In the Assignment type list, select WorkBasket.

In the Router field, press the Down Arrow key and select a router activity that sets the AssignTo property to the name of a work queue.

**Other Routing types:**

\* what is Assignment routing?

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ex:Employee creates report--->Manager approves report---->payroll sends money

\* what is Chat routing?

In most cases,a chatbot is the first to receive a request from a customer.when the customer seeks escalation to a human agent,the pega routing engine

handles the request.

> The routing engine assigns the chat request to customer service representative(CSR).

ex:Incoming chat request:A Customer initiates a chat session by clicking on the chat widget on a campany's website or application.

\* what is Intelligent routing?

Intelligent routing uses the metadata that is captured for each messaging interaction to rule requests to specific queue.

>The metadata includes the identifed language,message type channel data.

ex:Claim submission:A customer submits an insurance claim through the company's online portal.The claim data is captured in a pega case.