**Case Designer:**

**Case Types: before pega 7 also we have case types.  Case designer : is available from Pega 7**

**Case Designer: Contains Built-in Process flow ( It will create a WO in the run time). It will have stages.**

**Stage = Set of Multiple flows ( Collection of flows- Under Stage all flows are sub Flows)**

**Square Box: Process ( 1 Flow) - Here every flow is a sub flow**

**Step: 1 Flow Shape**

**Case Type-> Case Designer->Data Model(Optional)-> Add Work Flow(Life Cycle)-> Stages-> Process( Flows)-> Steps( Flow Shapes) -> View ( Section & Flowaction)**

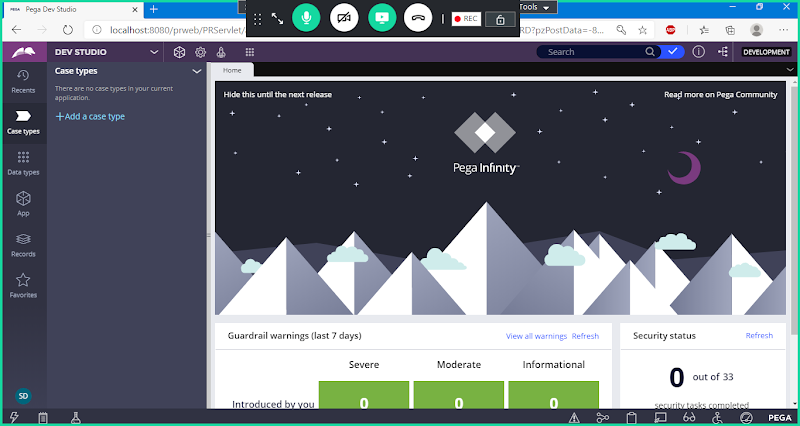
**pyStartCase: is the starting Process flow**

**After we add case type, stages, processes, steps and Views It will create below rules.**

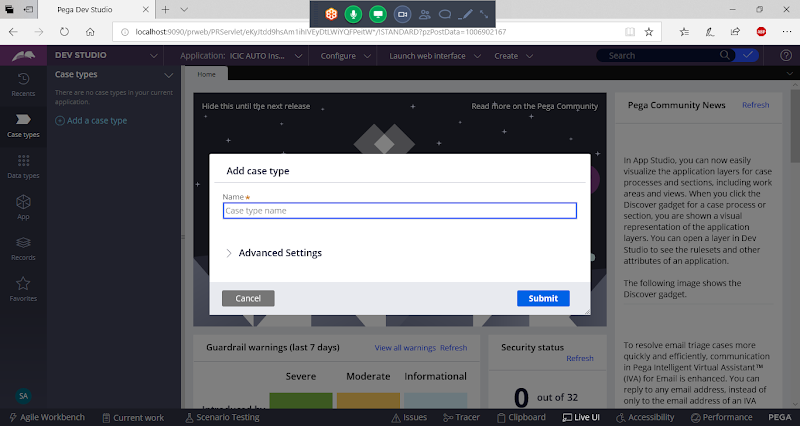
* **Class which belongs to and inherits from class group.**
* **Properties**
* **Sections**
* **Flow Actions**
* **Flows**
* **Case Type**

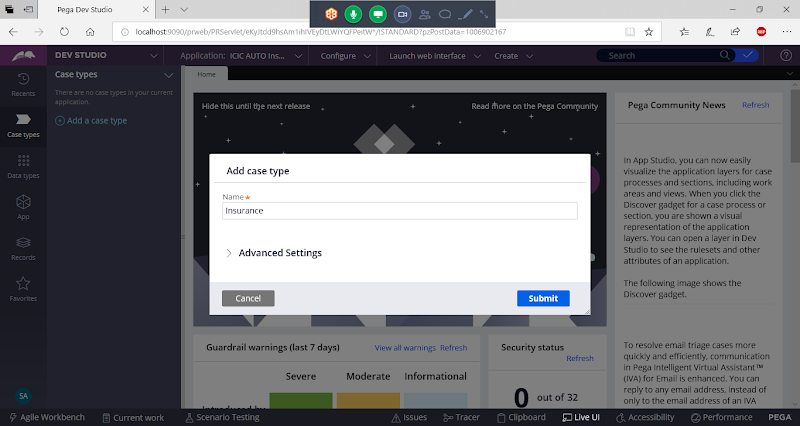
**Req:  Redesign Work flow to have stages & steps using case types:**

**Working with Case Type & Case Designer:**

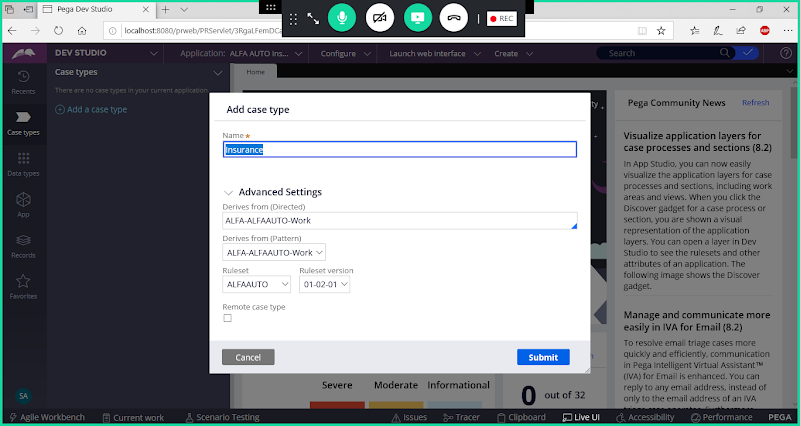
**Add New Case Type from Cases Explorer:**

**Click on Add Case Type:**

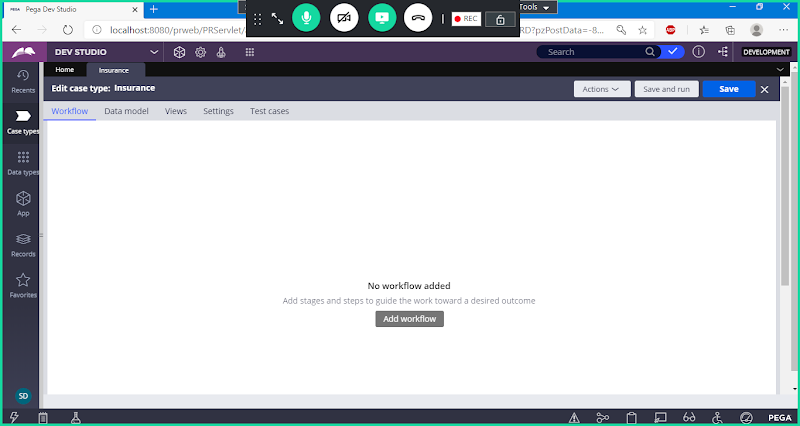




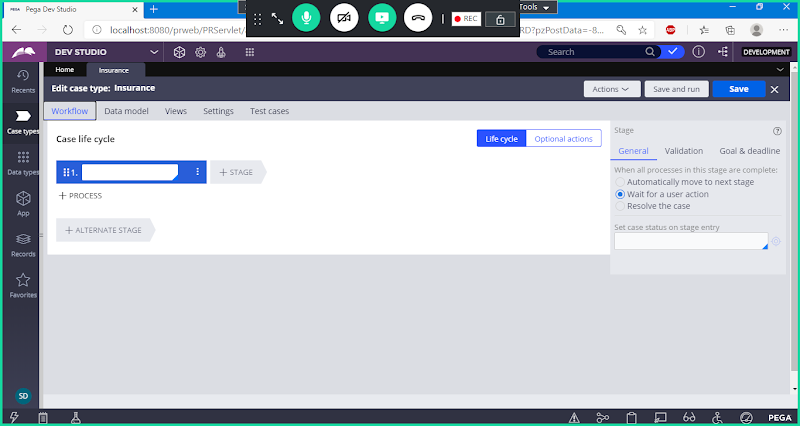
**Expand Advanced settings:**



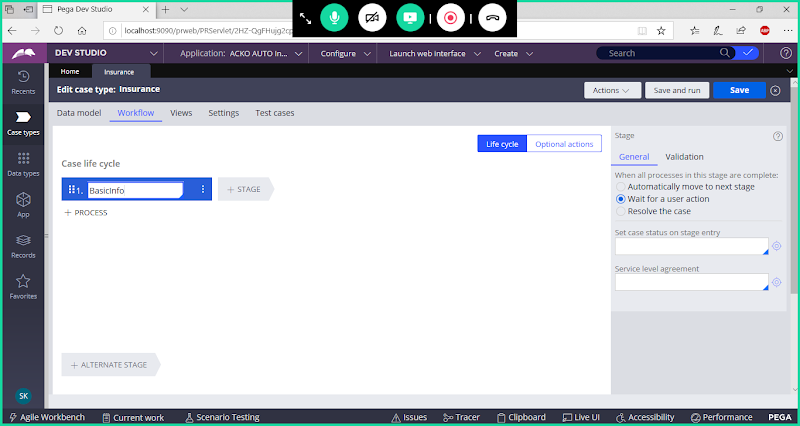
**Submit**



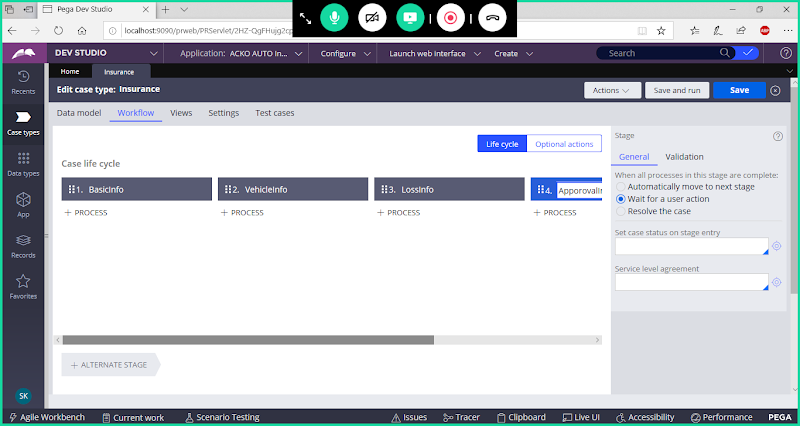
**Click on add Work Flow:**

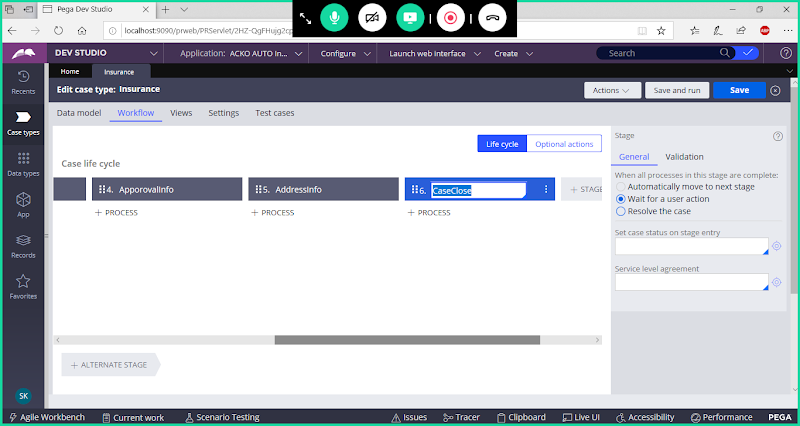


**Add Stages:**



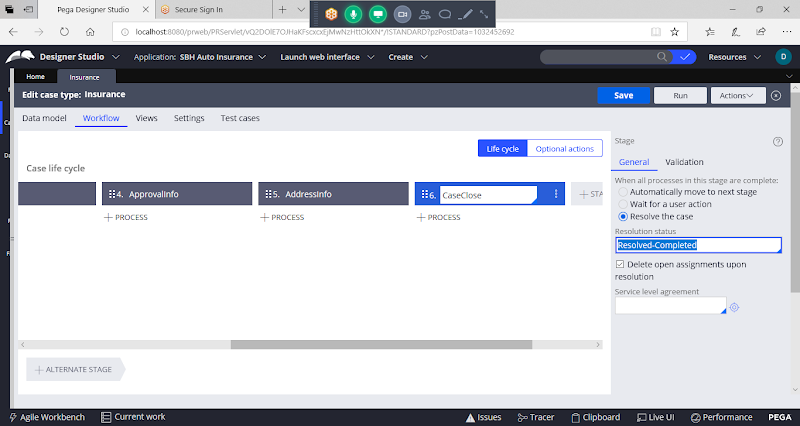
**Now Add Stage names:**





**For Case Close Stage :  Set the status as Resolved Completed:**

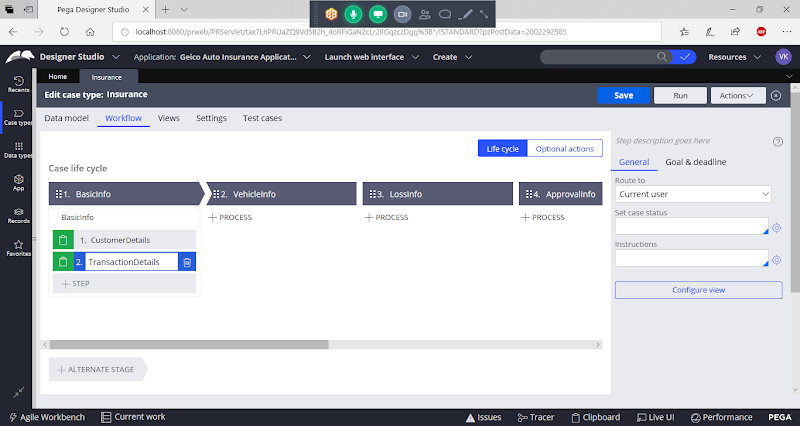
**First Click on radio button - Resolve the Case**

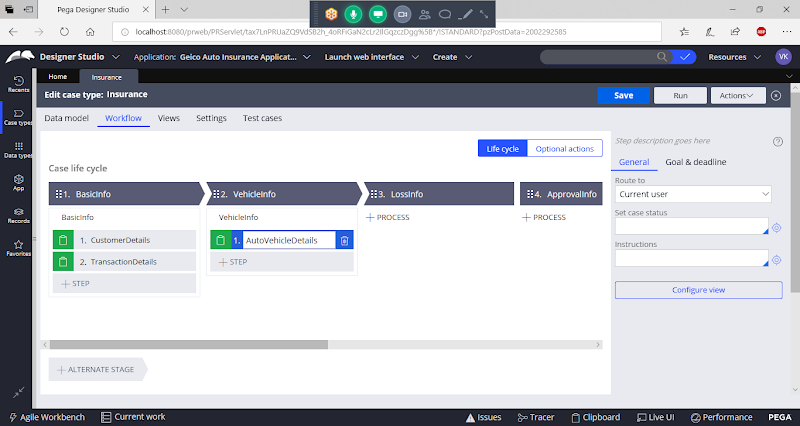


**Add Process under each stage:**

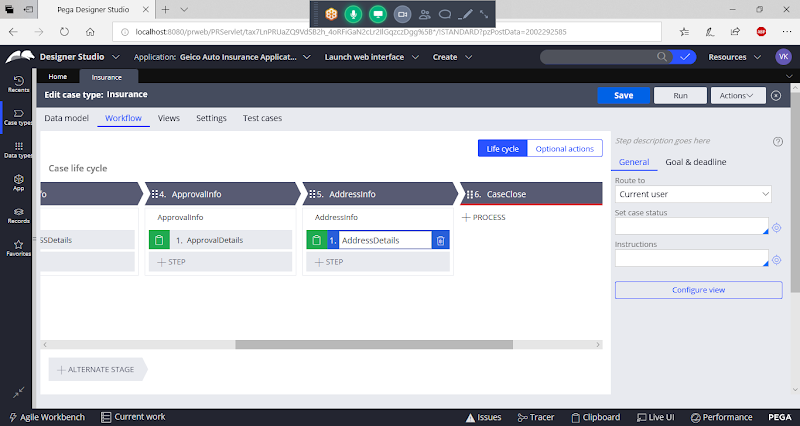
**Click on Add Process & Step Names**

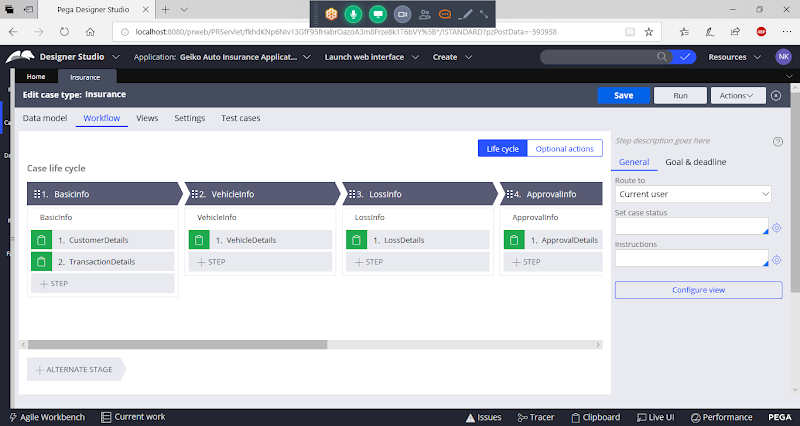
**Under Basic Info Process-> Add Step-> Collect Info:**





**Now Add Steps under Each Process:**





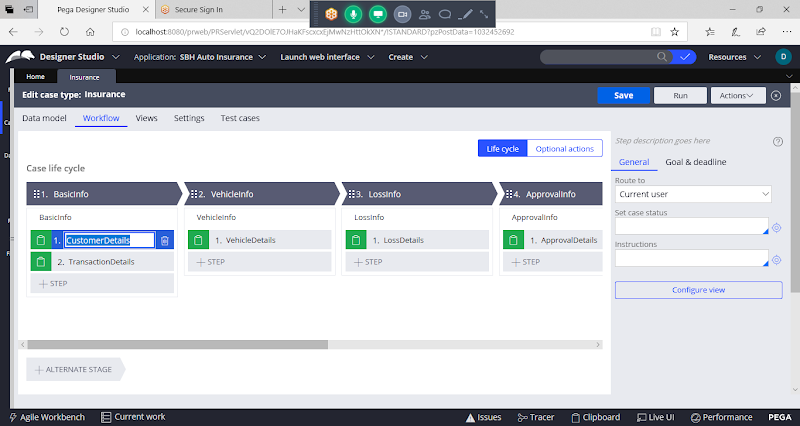
**Save Case Type**

**Configure View: User Interface**

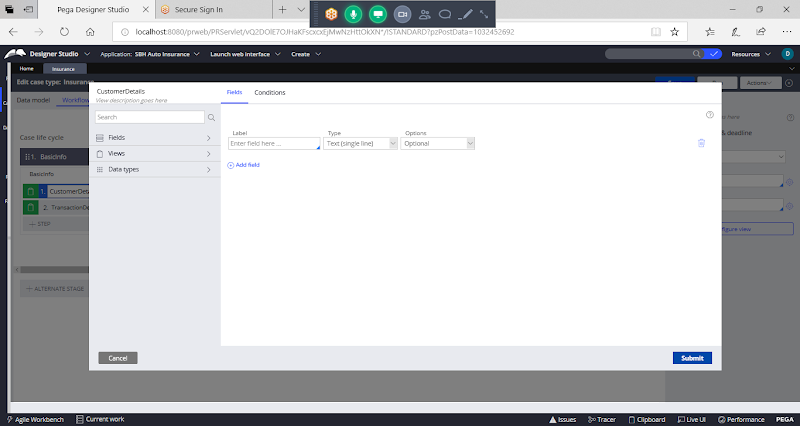
**View :  Flowaction  -> Section**

**When we configure View it will create Section & Flowaction for each view**

**For Each step we have to configure the View:**



**Click on Step -> Click on Configure view:**



**Click on Submit:**

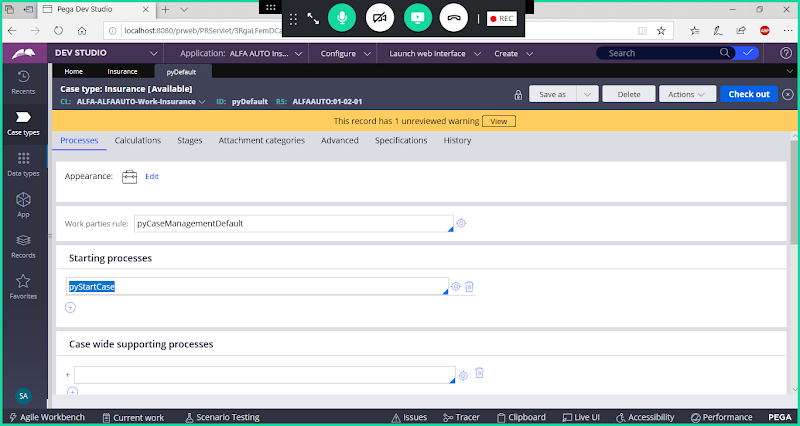
**Similarly configure view for remaining steps in the Life Cycle:**

**After Configuring View save the case:**

**===**

**Case Type Classes/Work Classes: Concrete - Belongs to Class group**

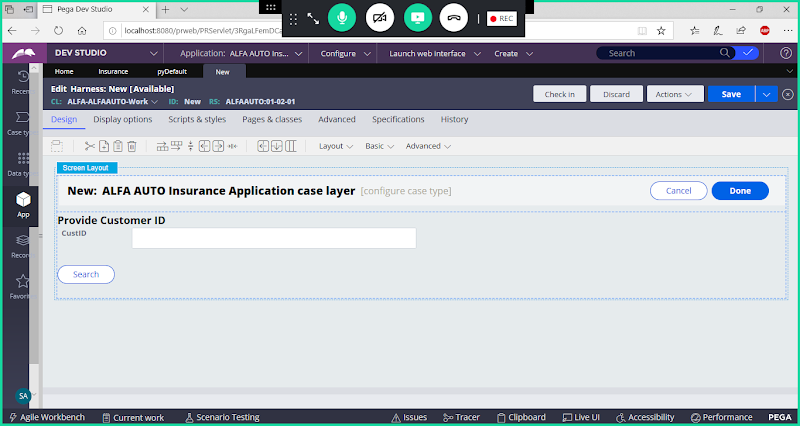
**For any Case Type: Starting Process is : pyStartCase**



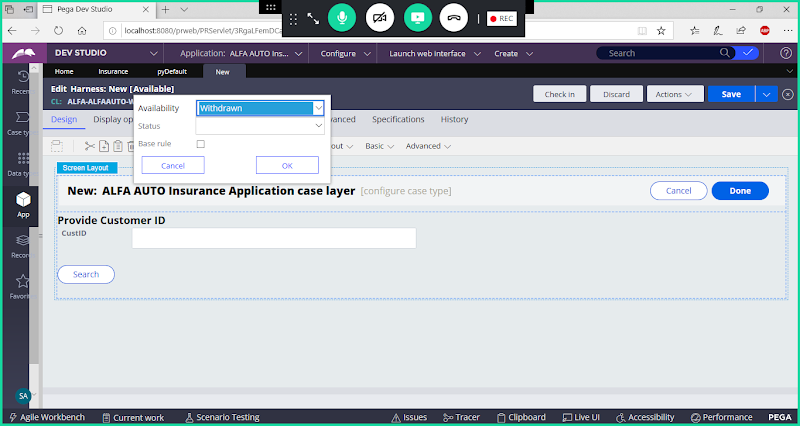
**---**

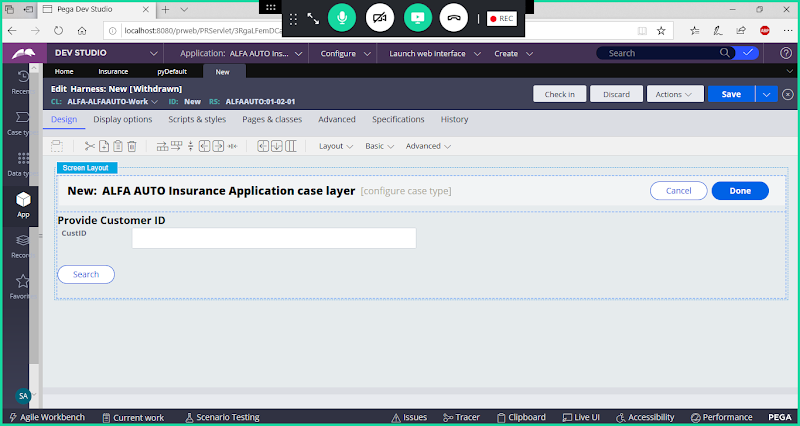
**With Drawn-> New & Perform Harness Rules:**

**Open New Harness Under Work Layer & Withdrawn the Rule:**



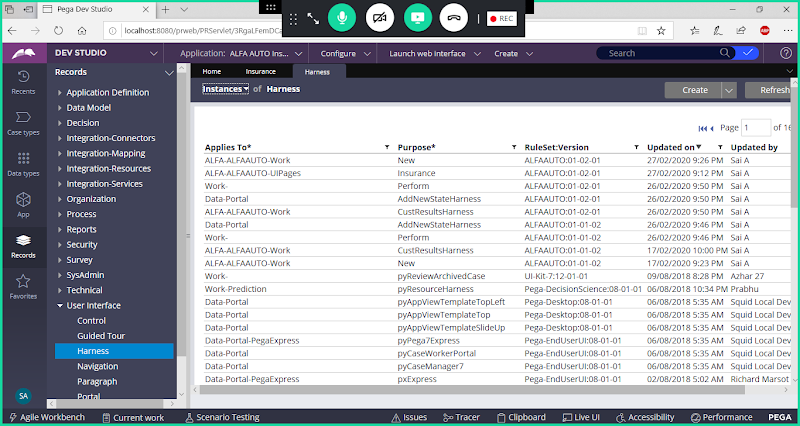
**Now Select WithDrawn**



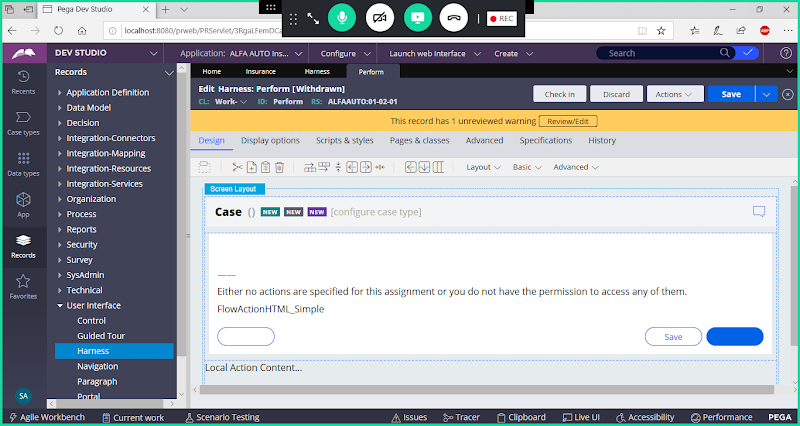


**Save & Check in**

**Open Perform Harness & Withdraw ( Open From Records Explorer-> UserInterface -> Harness)**

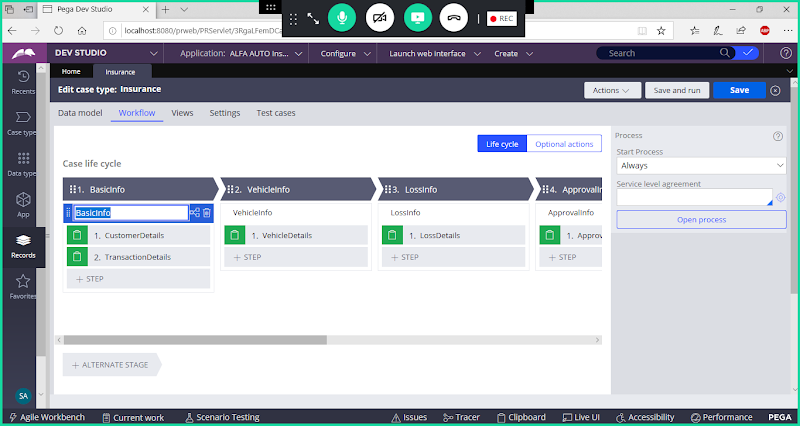


**Open Perform Harnes ( Latest Version Rule)**

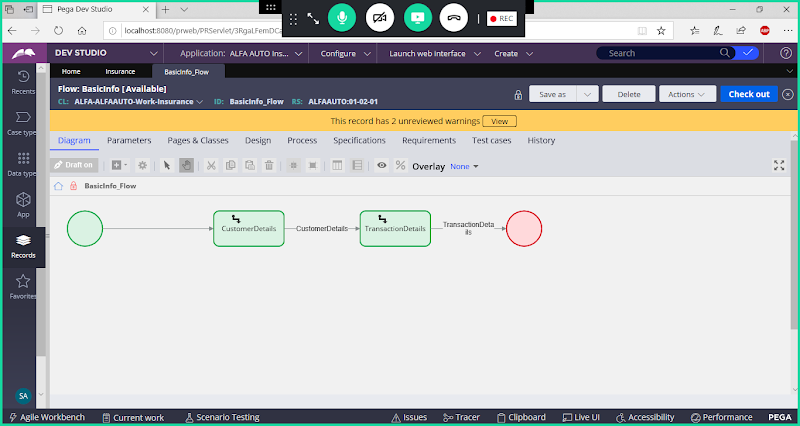


**Save & Check in**

**In Insurance Case Open Each Sub Flow & Add the Flowaction Names ( Replace with User Defined Flowaction which are created in Parent Class)**



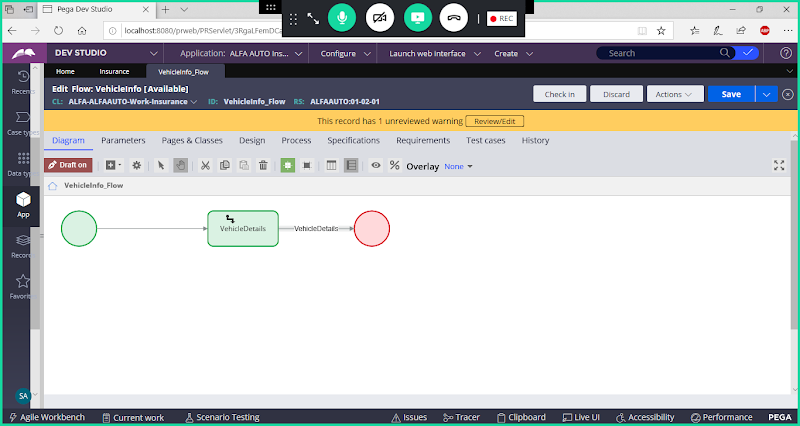
**Open Process & Configure Flowactions**

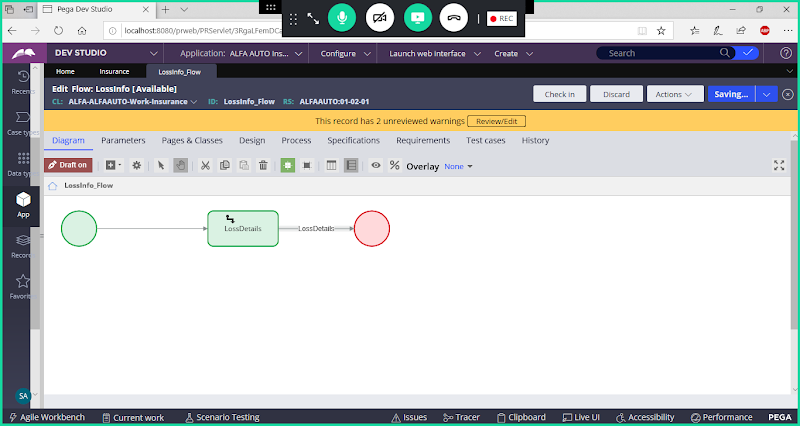


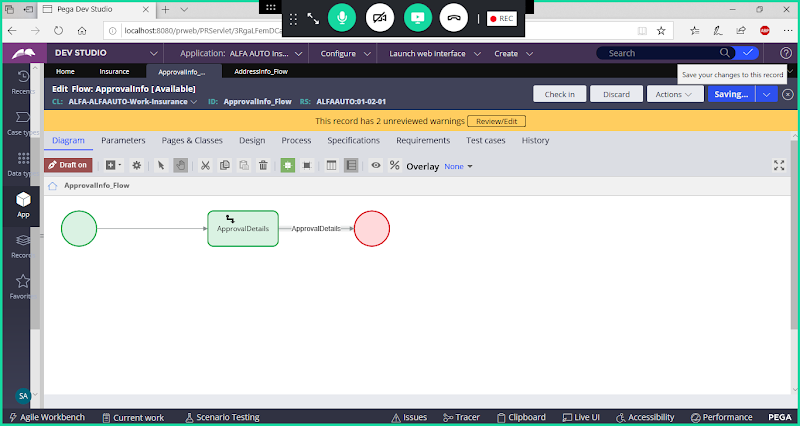
**Open Assignment Connector Properties & Replace Flowaction Names.**

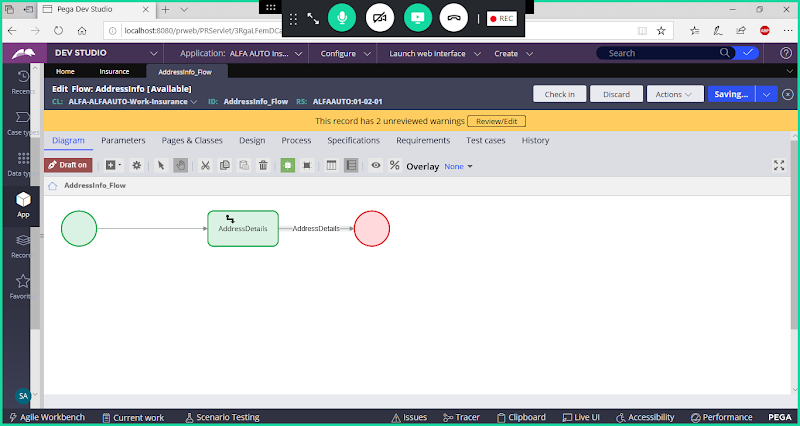
**Save & Check in**

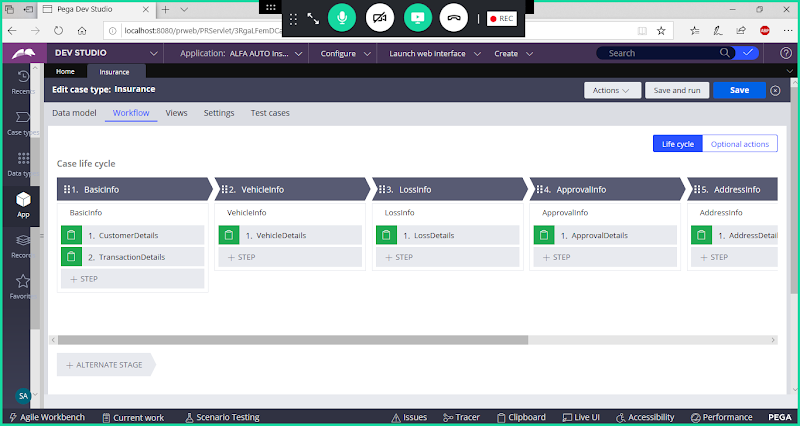
**Similarly configure remaining flow in the case type: ( Open Flow & Update the Flowaction from Work Layer)**



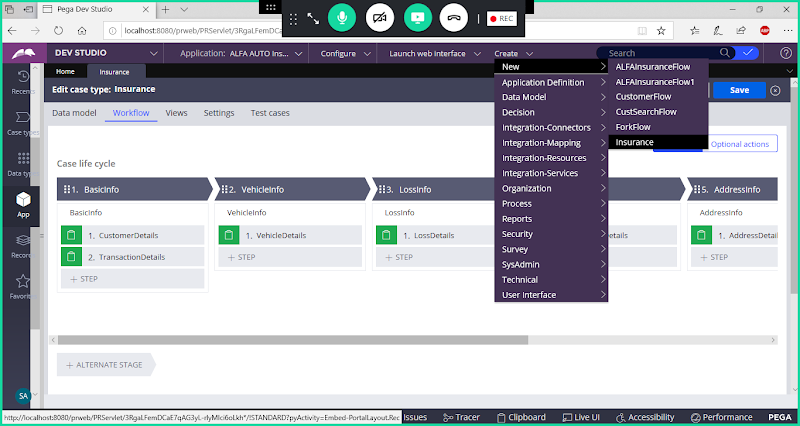


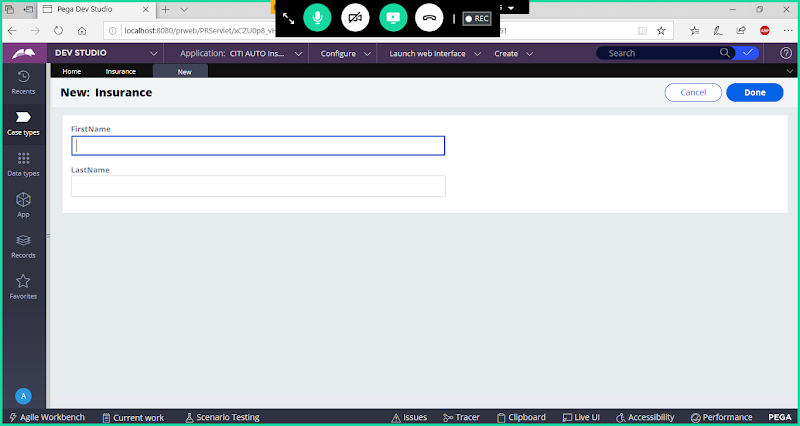




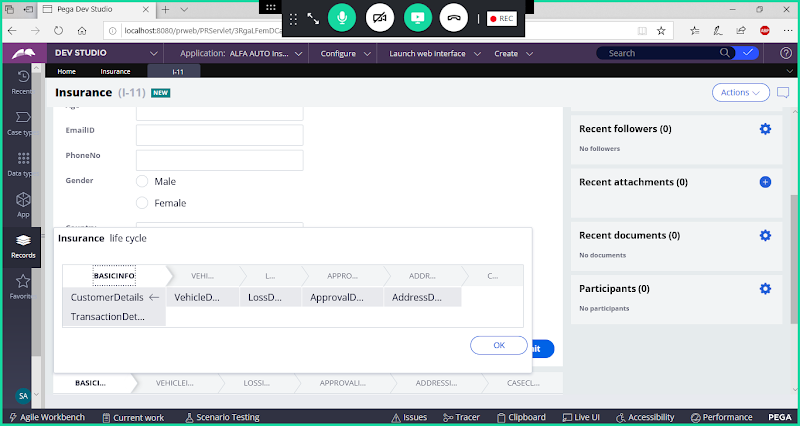


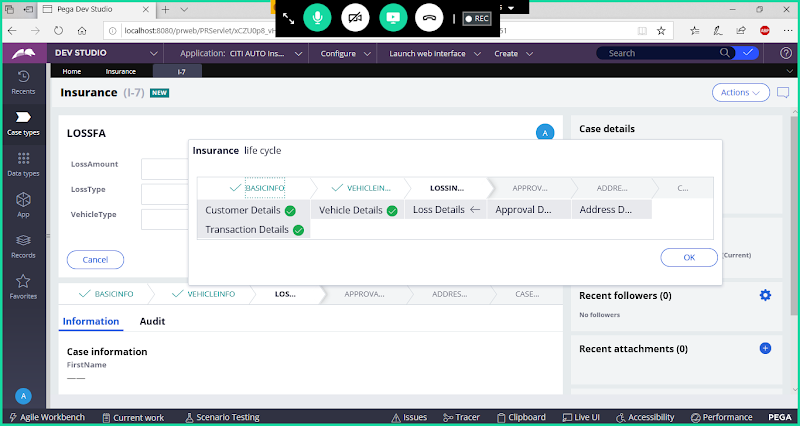
**Save Case & Run the case.**



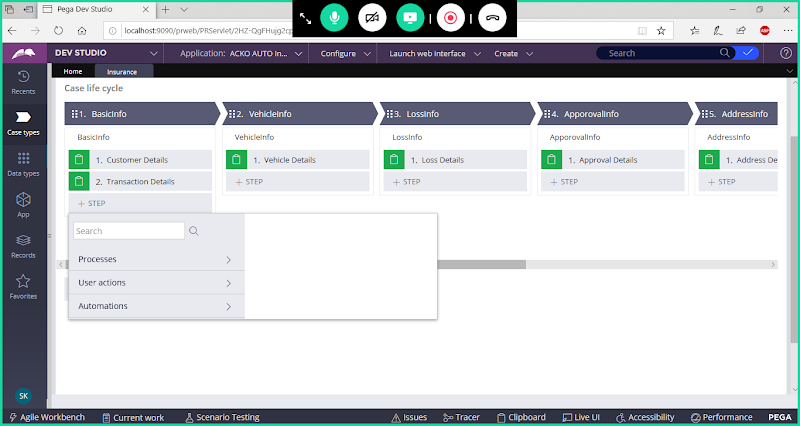


**Click On Done**

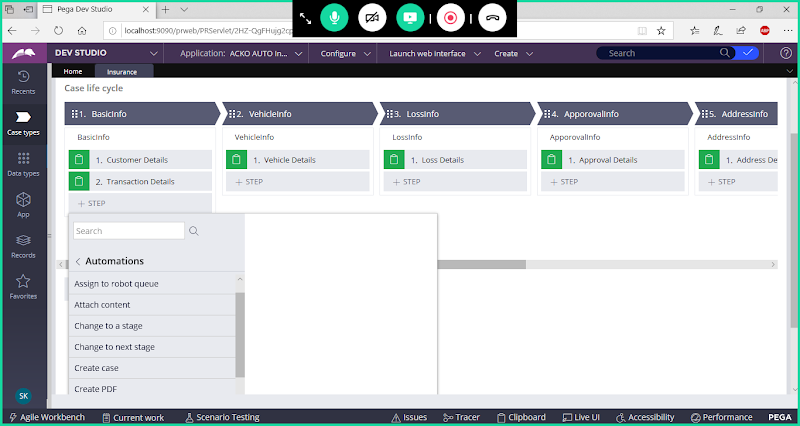




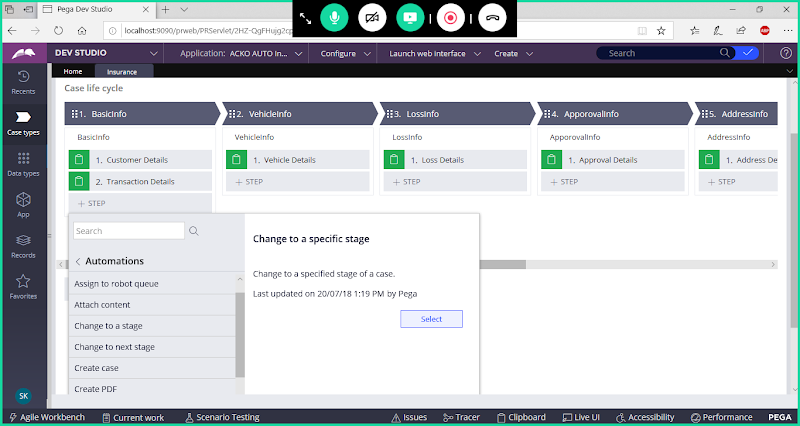
**Adding Change Stage Utility:**



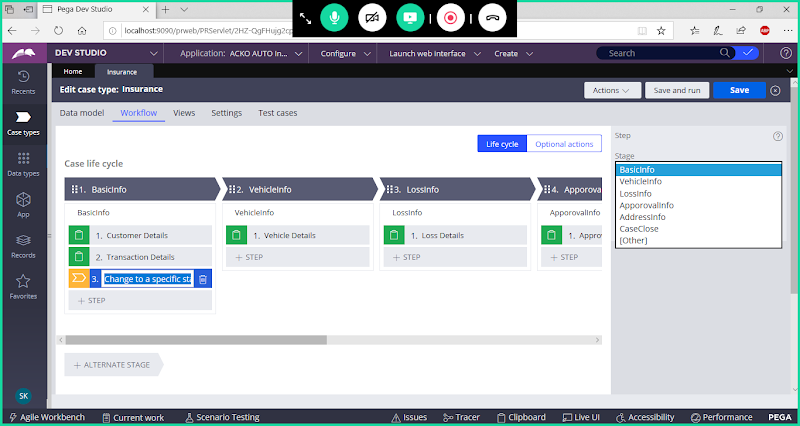
**Click on Automations**



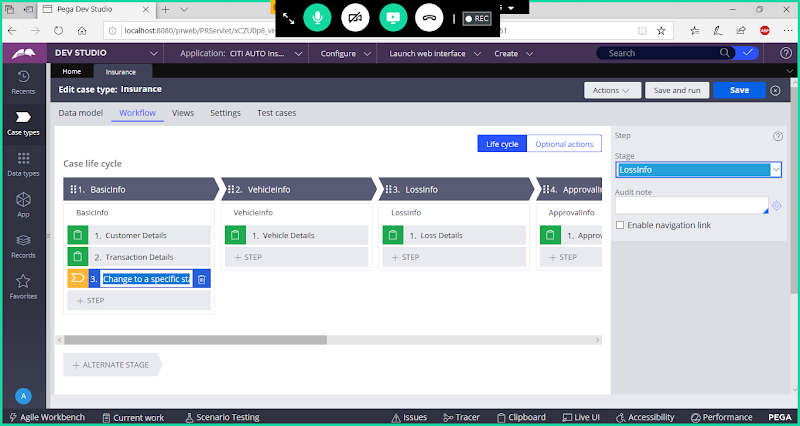
**Select Change to a Stage/ Click on Change Stage:**



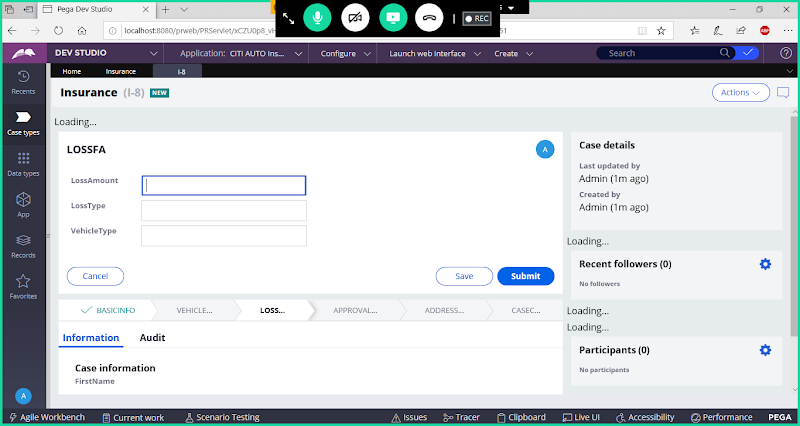
**select**



**Select Stage**



**Save & Run Case:**

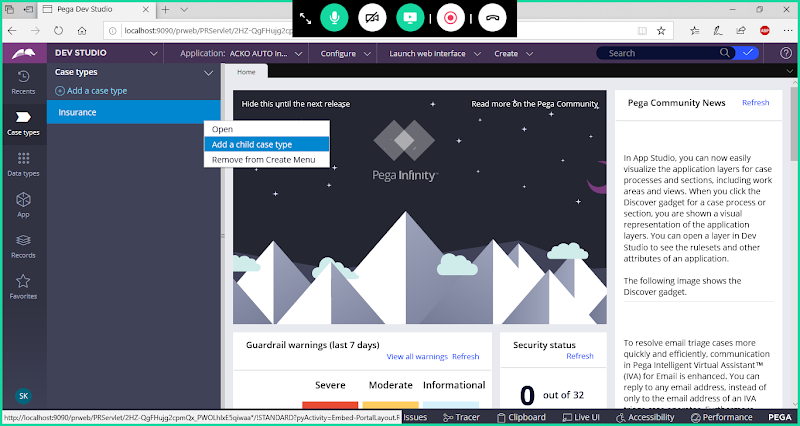


**======**

**Insurance: Main Case Type**

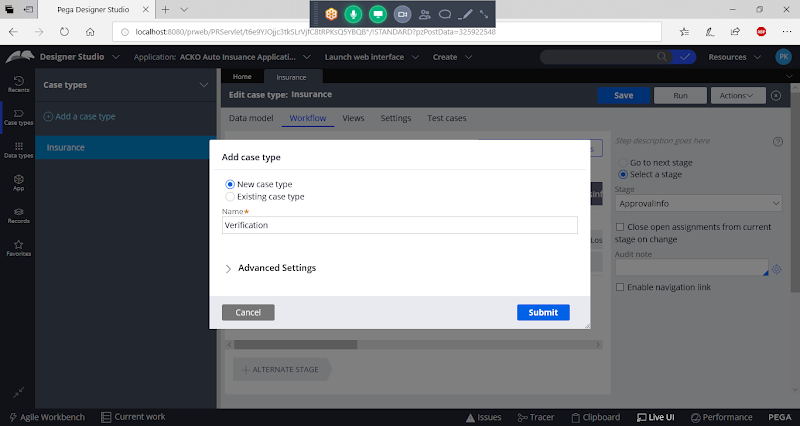
**Add Sub Case Types**

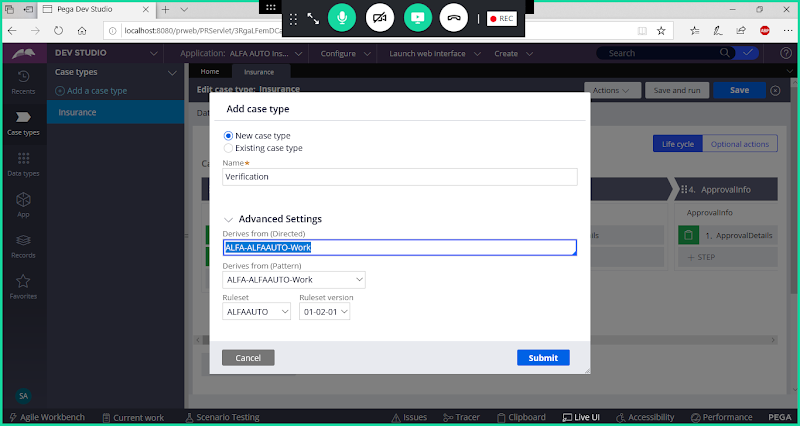
**Case Management:**



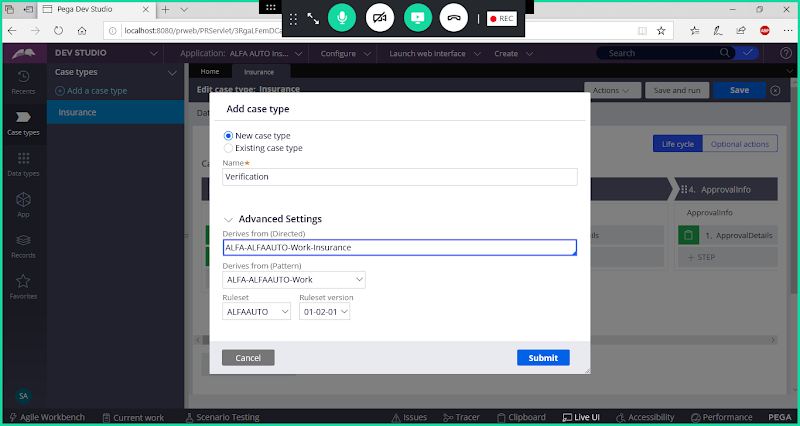
**Add Child Cases : Verification  & Approval**

**Go to Case Types Explorer:**

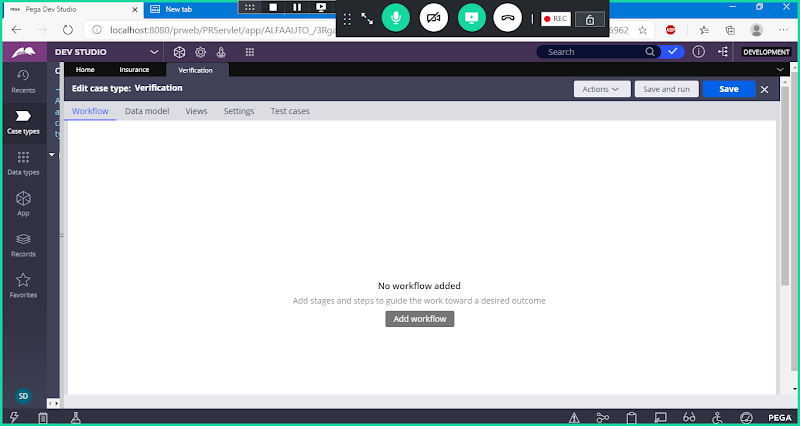




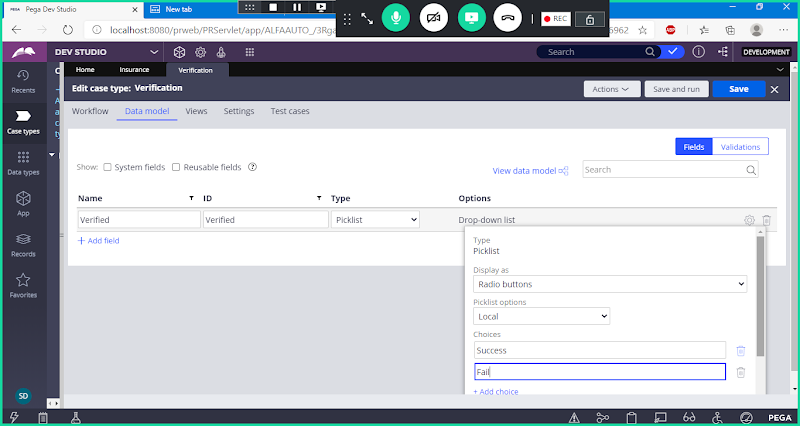
**Change Directed Parent to Insurance Class:**

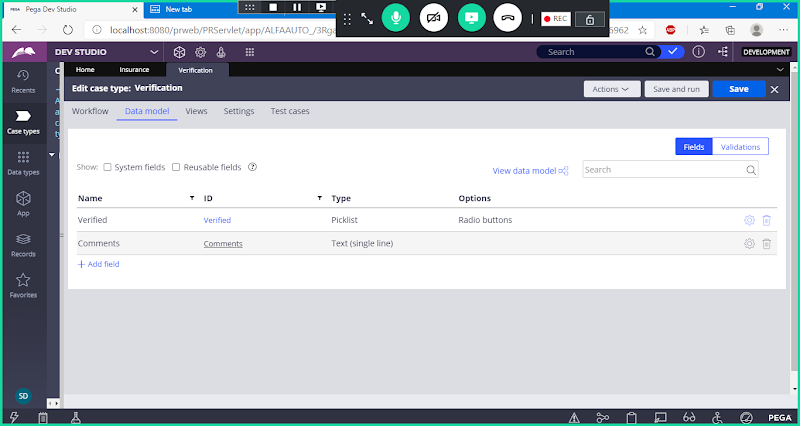


**Submit**

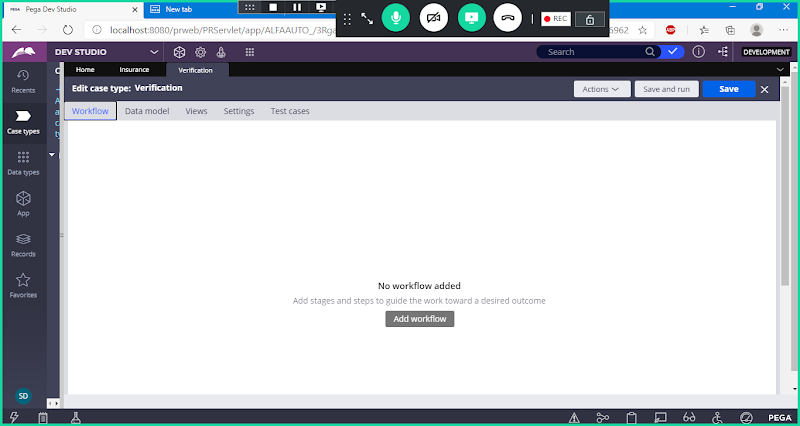


**Go to Data Model**

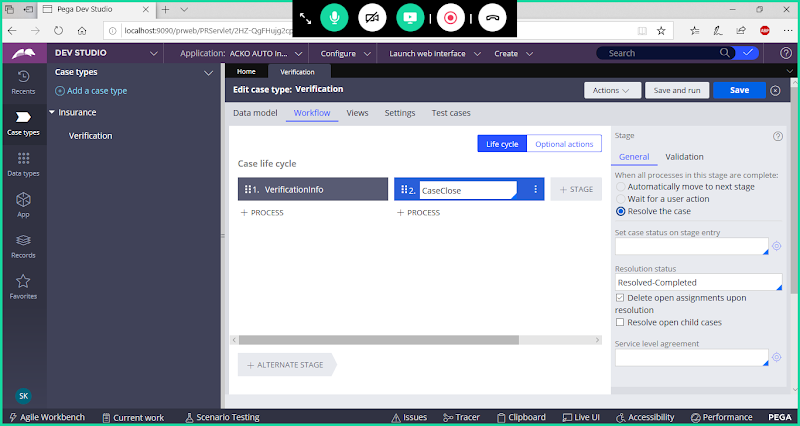


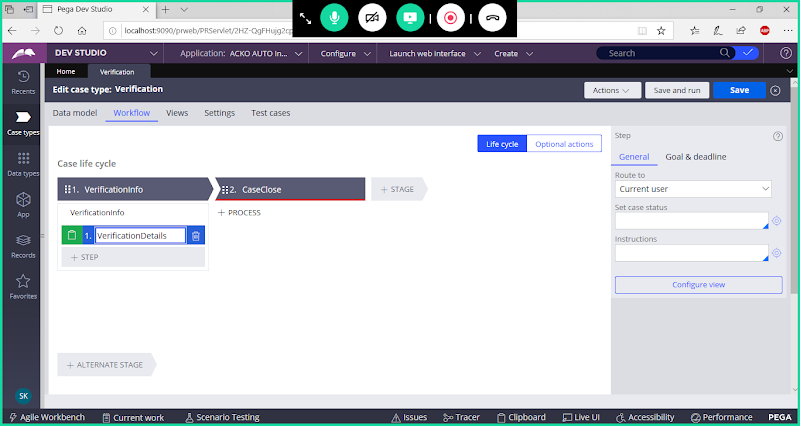


**Go to Work Flow Tab:**

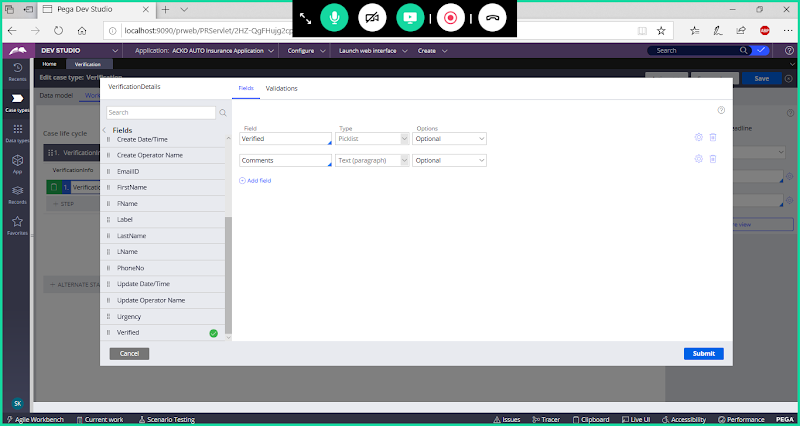


**Click on Add WorkFlow**





**Configure View**

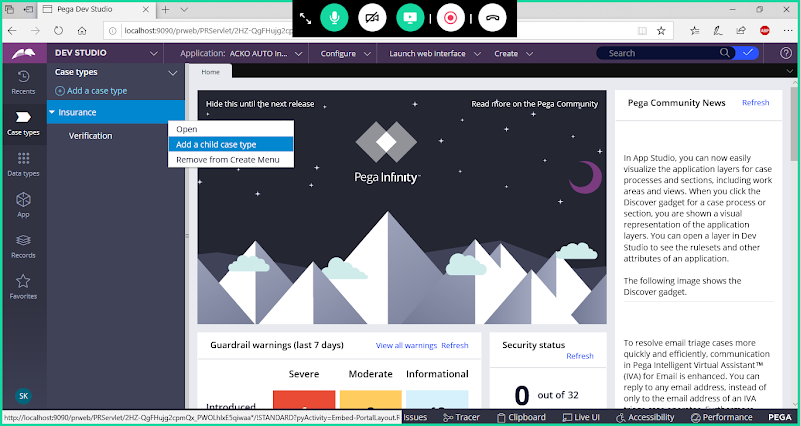


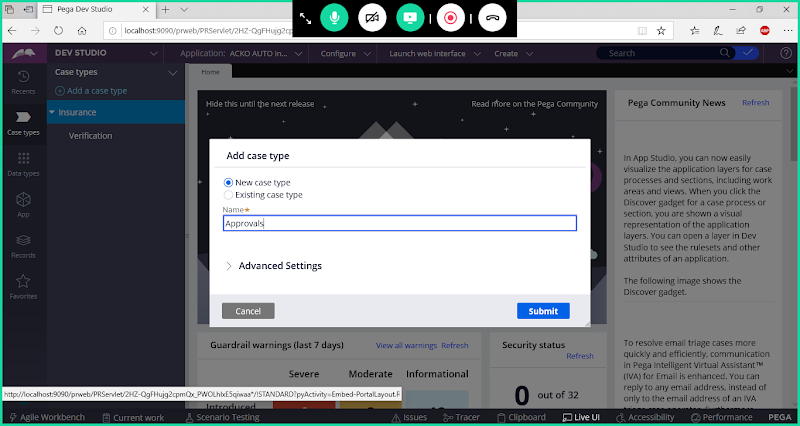
**Submit**



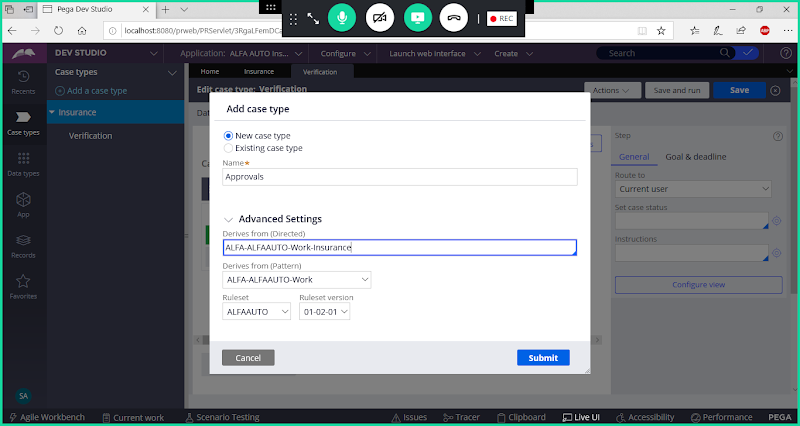
**Save Verification case.**

**Add Child Case: Approvals:**

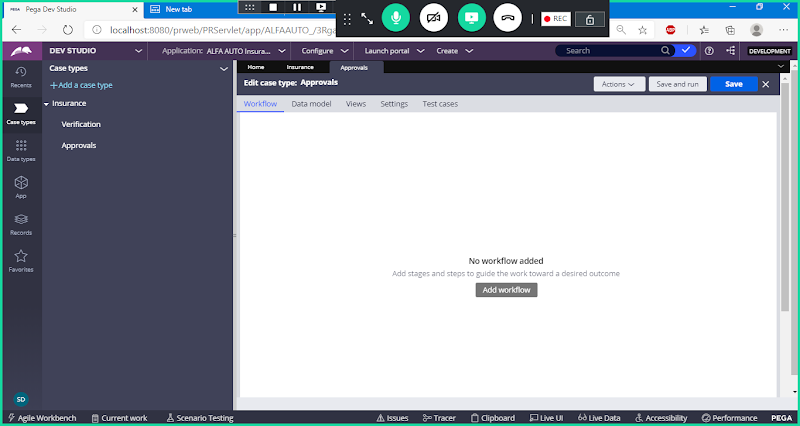




**Change Direct Inheritance:**

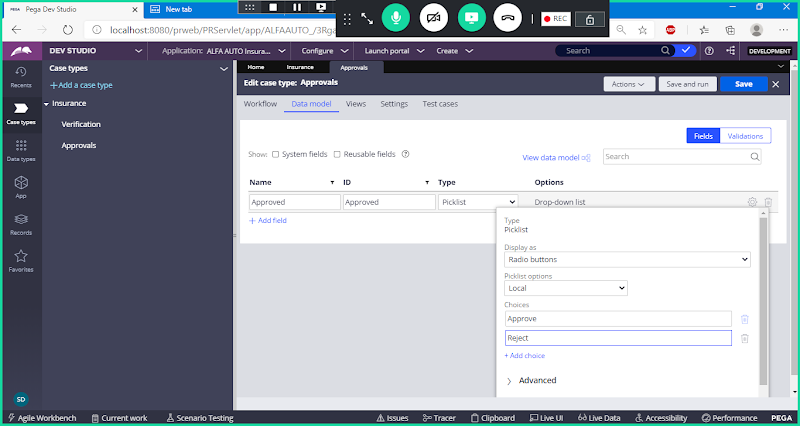


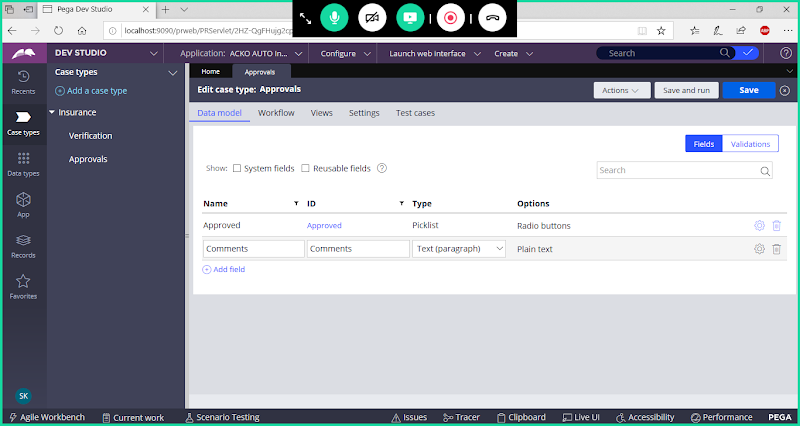
**Submit**



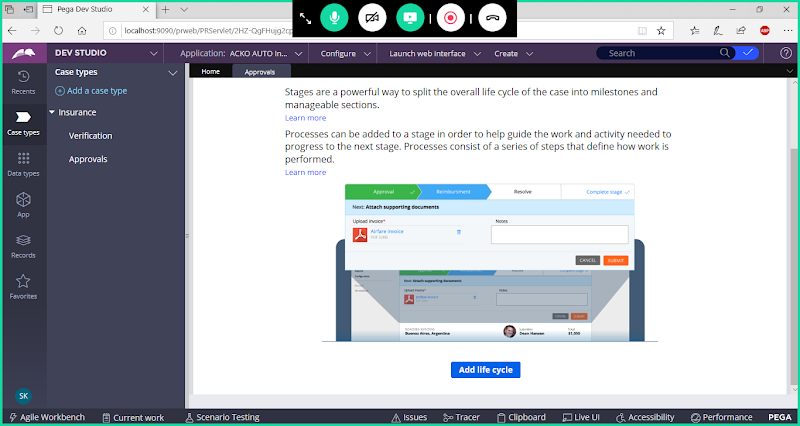
**Go to Data Model**

**Add Fields:**

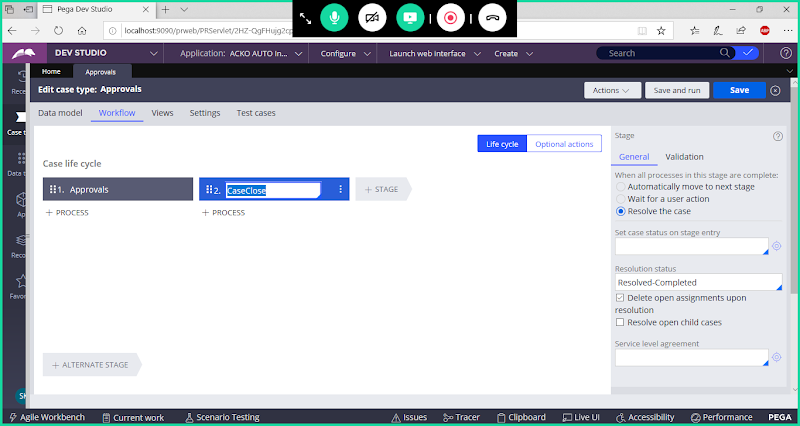


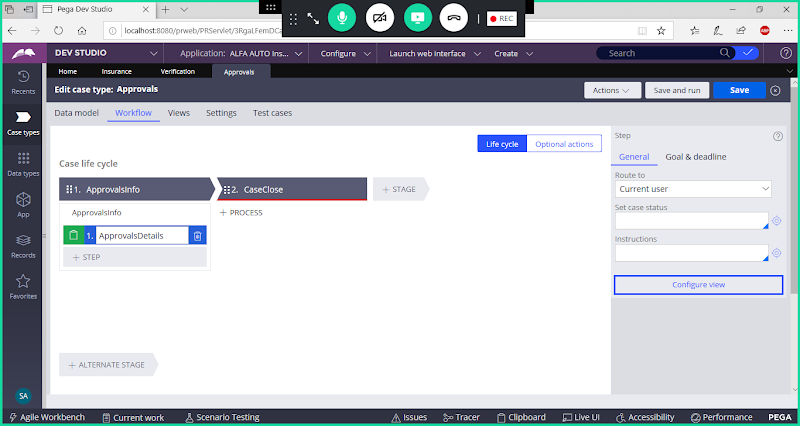


**Go to Work Flow Tab:**

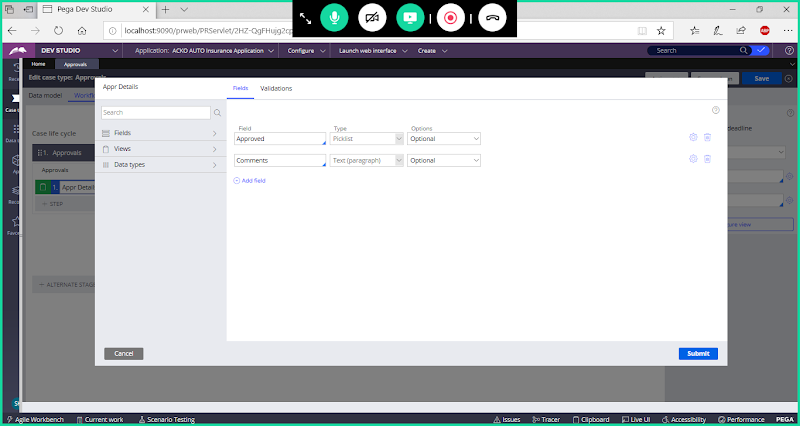


**Add Life Cycle**

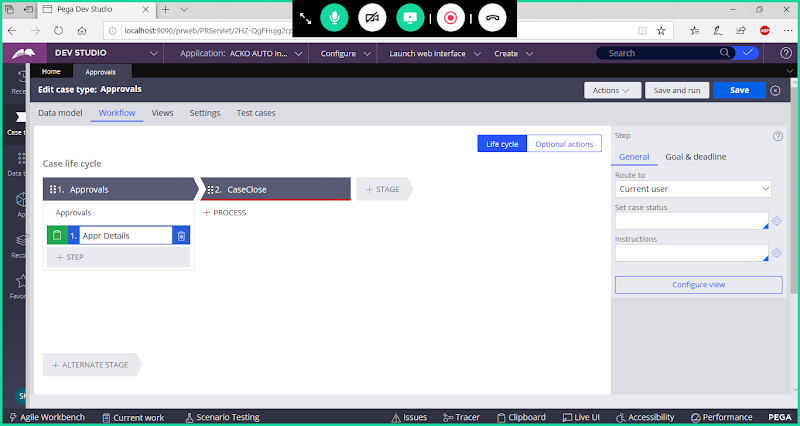




**Configure View**



**Submit**



**Save Case**