

Lesson 2 Configuring Escalation

2.1 Create an escalation activity

The customer wants to create an escalation activity for trouble tickets that have been escalated.

2.1.1 Requirements

Spec 1 Create an escalation activity for escalated trouble tickets.

Spec 2 The escalation activity should not be created if the trouble ticket is already escalated.

Spec 3 The escalation activity should not be created if an escalation activity already exists for the escalated trouble ticket.

Spec 4 The default due date for the escalation activity is 10 days.

Spec 5 The default escalation date for the escalation activity is 30 days.

Spec 6 Set the escalated activity to High priority.

Spec 7 The subject of the escalation activity should say “Trouble ticket <Ticket #> escalated.”

Spec 8 The description of the escalation activity should say “Trouble ticket <Ticket #> assigned to <User Name/Group Name> has been escalated.”

Spec 9 Assign the escalation activity to the group supervisor for the escalated trouble ticket.

Spec 10 Associate the escalation activity to the escalated trouble ticket.

2.1.2 Tasks

1. **Create an Escalation activity pattern based on the specifications.**
2. **Create a trouble ticket preupdate rule that creates the escalation activity.**
 - a) During the preupdate rule execution, the troubleTicket.Escalated property is equal to true due to trouble ticket escalation batch process.
3. **Restart the server because a new rule was created.**

2.1.3 Testing procedure

1. **Create an account.**
 - a) QuickJump: Run Account
2. **Create a new trouble ticket and set the due date and escalation date to BillingCenter system date.**
 - a) Complete the Trouble Ticket wizard.

- b) Assign the trouble ticket to Aaron Applegate in the Personal Lines group.
3. Open the trouble ticket and make sure an escalation activity is not created.
 4. Edit the trouble ticket and make any update. Make sure an escalation activity is not created.
 5. Run trouble ticket escalation batch process
 - a) Open Server Tools (ALT-SHIFT-T)
 - b) Run the Trouble Ticket Escalation process from Server Tools → Batch Process Info
 6. Verify the escalation activity has been created correctly and assigned to the supervisor of the Personal Lines group, Bruce Baker.
 7. Run the trouble ticket escalation batch process again to make sure a duplicate escalation activity is not created.
 8. Edit the trouble ticket and make any update. Make sure a duplicate escalation activity is not created.

2.1.4 Solution

1. Create an Escalation activity pattern based on the specifications
 - a) Navigate to Administration → Business Settings → Activity Patterns
 - b) On the Activity Patterns screen, click the New Activity Patterns button
 - c) In the subject field enter, “Escalation Activity”.
 - d) In the code field enter, “escalation”
 - e) Select High in the priority field
 - f) In the Activity Pattern Dates for Target section, enter 10 in the days field.
 - g) In the Activity Pattern Dates for Escalation section, enter 30 in the days field.
 - h) Click the Update button. If you get a warning about localization, just click the update button again to ignore the warning.
2. Create a trouble ticket preupdate rule that creates the escalation activity
 - a) In Studio, open the Trouble Ticket pre-update ruleset.
 - b) Add a new rule named TTPU1000 – Escalation Activity

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USES:
uses gw.api.web.admin.ActivityPatternsUtil

CONDITION: (troubleTicket : entity.TroubleTicket):
return !troubleTicket.New and troubleTicket.Escalated and
    !troubleTicket.Activities.hasMatch(\act -> act.ActivityPattern.Code == "escalation")
ACTION (troubleTicket : entity.TroubleTicket, actions : gw.rules.Action) :
    // Create an escalation activity
    var act = new Activity()
    act.ActivityPattern = ActivityPatternsUtil.getActivityPattern("escalation")
    act.Subject = "Trouble ticket " + troubleTicket.TroubleTicketNumber + " escalated"
    act.Description = "Trouble ticket " + troubleTicket.TroubleTicketNumber +
        " assigned to " + troubleTicket.AssignedUser + "/" + troubleTicket.AssignedGroup
        + " has been escalated"

    // assign the escalation activity to the supervisor of the assigned group
    act.AssignedGroup = troubleTicket.AssignedGroup
  
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act.AssignedUser = troubleTicket.AssignedGroup.Supervisor  
// associate the escalation activity to the trouble ticket  
troubleTicket.addToActivities(act)  
END
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3. Restart the server because a new rule was created.