

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.