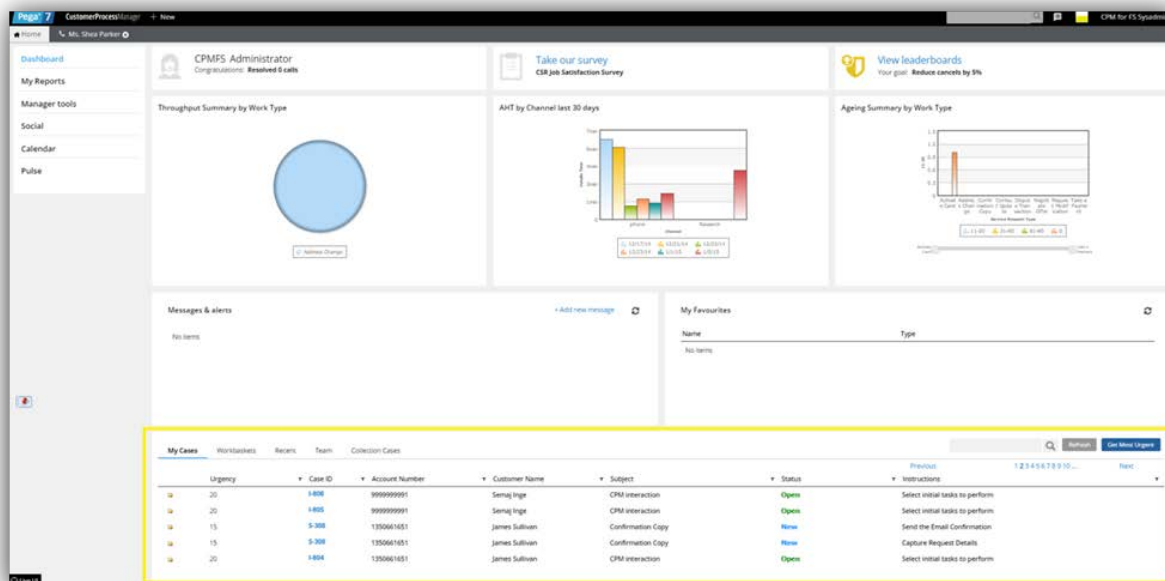


# Configuring a Consolidated Worklist

## Pega Customer Service for Financial Services 7.1.3

March 2015

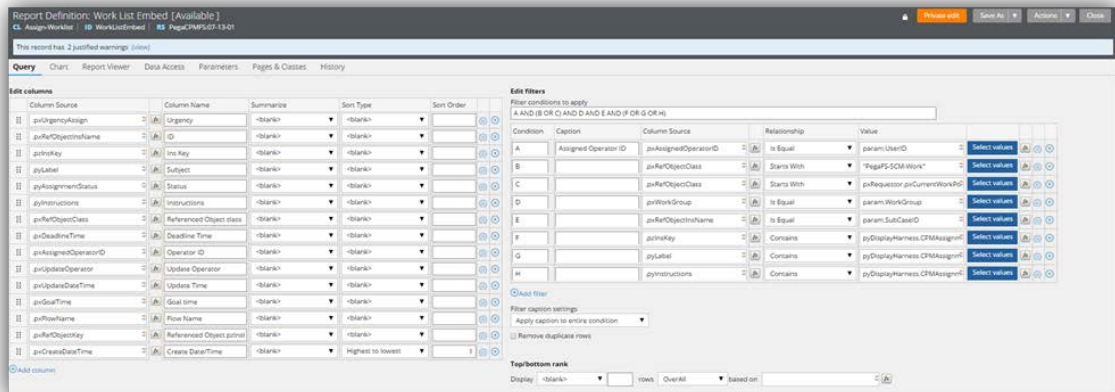
This article describes how to configure a consolidated worklist where service cases created in the Service Case Manager for Financial Services (SCMFS) application are retrieved and display on the My Cases or the Work List tabs on the application user's dashboard.



The application is installed with sample rules that you can use to model and create your own merged lists. To extend them, save them to your application and ruleset.

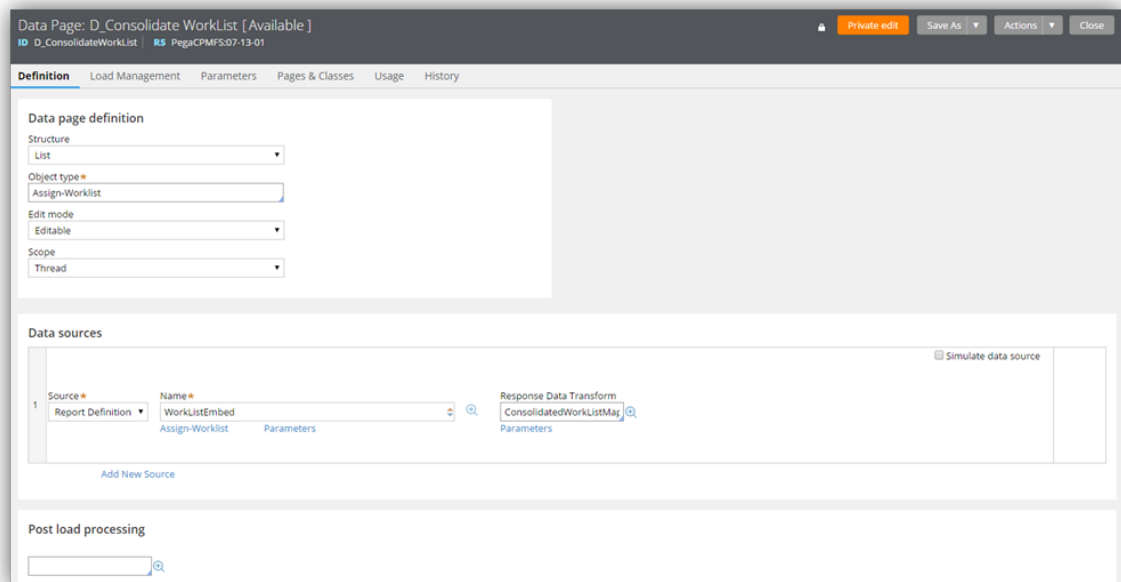
1. Create a report definition to retrieve the Interaction/Service Cases from the **pc\_assign\_worklist** table.

The **WorkListEmbed** report definition rule is an example.



2. Create a Data Page with the report definition as a Data Source and configure a Response data transform to iterate through the results retrieved by the Report definition and map them to the corresponding properties.

The **D\_ConsolidateWorklist** data page is an example of how the report definition retrieves items from the SCM\_WORK and CPMFS\_WORK database tables. The result is that cases from the CPMFS and SCM applications are merged into a single unified list.



The **ConsolidatedWorkListMap** data transform is an example of results mapping from a particular application.

Data Transform: Consolidated WorkListMap [ Available ]
Private edit
Save

CL Code-Pega-List
ID ConsolidatedWorkListMap
RS PegaCPMF5:07-13-01

Definition
Parameters
Pages & Classes
History

	Action	Target	relation	source
▶ 1	Append and Map to	TempSource.pxResults	each page in	DataSource.pxResults
▶ 2	For Each Page In	TempSource.pxResults		<input type="checkbox"/> Also use each page as source context
• 3	Remove	D_OpenRuleset[RulesetName:"Pega-FCM"]		
▼ 4	When	IsFCMInstalled		
▶ 4.1	For Each Page In	D_pyFCMRWorkList[UserID:OperatorID.pyUserIdentifier].pxResults		<input type="checkbox"/> Also use each page as source context
▶ 4.2	For Each Page In	D_pyFCMRWorkList[UserID:OperatorID.pyUserIdentifier].pxResults		<input type="checkbox"/> Also use each page as source context
• 5	Remove	TempSource		

Collapse All
Expand All

☐ Call superclass data transform

A grid repeating layout is used to present the cases in the worklist display and a double click event is fired to open a case in a new tab. Similar steps are configured for the Recent lists to display open and closed cases on the user dashboards.

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## **Pega Customer Service for Financial Services**

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