Exercise: Configuring a case type

## Your assignment

* Create the Mortgage Request case type
* Design the case life cycle, including alternate stages, for the Mortgage Request case type

|  |  |  |  |
| --- | --- | --- | --- |
| **Stage** | **Process** | **Step** | **Step type** |
| Select Mortgage | Collect Mortgage Details | Mortgage Information | Collect information |
| Personal Information | Collect information |
| Send Acknowledgement | Persist case | Automation |
|  |  | Send Acknowledgement | Send email |
| Process | Contact Customer | Validate Details | Collect information |
|  | Send Updates To Customer | Send email |
| Loan Approval | Fulfilment | Manager Approval | Approve/Reject |
| Send Confirmation | Send email |
| Approval Rejection | Approval Rejection | Send Rejection | Send email |

* Add status changes to the case life cycle.

|  |  |
| --- | --- |
| **Case status** | **Applied to** |
| New | Select Mortgage stage |
| Pending-Validation | Process stage |
| Pending-Approval | Loan Approval Stage |
| Resolved-Completed | Resolution-Status-Loan Approval |
| Resolved-Rejected | Approval Rejection Stage |

* Add service level agreements to the Mortgage Request case, the Validate Details step

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Apply to** | **Goal** | | | **Deadline** | | | **Passed deadline** | | |
| **Interval** | **Urgency** | **Notify** | **Interval** | **Urgency** | **Notify** | **Interval** | **Urgency** | **Notify** |
| Case type | 2 days | 10 |  | 04:00:00 | 10 |  |  |  |  |
| Validate Details | 3 days | 10 | Assignee | 00:10:00 | 10 | Assignee |  |  |  |

* Route the Validate Details step to the specific user branchofficer@BOM and Manager Approval step to MortgageManager@BOM

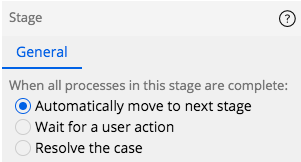
## **Detailed steps**

Create the Mortgage Request case type

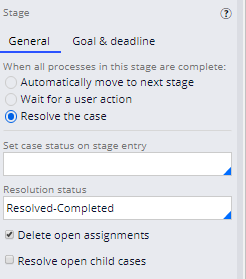
1. Log in to App Studio as the user author\_cm@gogoroad using the password rules.
2. In App Studio, from the left navigation panel, click **Case types** to view the Case Type Explorer. A list of case types defined for your application is displayed.
3. From the Case Type Explorer, click **New**  to open a dialog for creating a new case type.
4. In the **Case type name** field, enter Mortgage Request to provide a name for your case type.
5. Click **Next**  to dismiss the dialog. A new case type record named Mortgage Request is displayed in the work area.

Add stages to the Mortgage Request case life cycle

1. On the Mortgage Request case type, click the **Workflow**  tab to begin modeling the Mortgage Request work flow.
2. Click **Add life cycle**. A case life cycle with one stage is displayed.
3. In the text field of the first stage, enter Select Mortgage as the name of the first stage.
4. In the contextual properties panel on the right, ensure that **Automatically move to next stage** is selected to advance the case automatically.



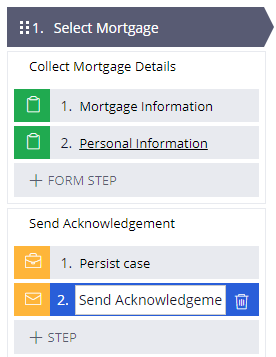
1. In the **Set case status on stage entry field**, enter or select New to change the status of a case when it enters the Select Mortgage stage.
2. To the right of the Select Mortgage stage, click **+ STAGE** to create a second stage in the case life cycle.
3. In the empty stage name field, enter Process to name the second stage.
4. In the contextual properties panel on the right, ensure that **Automatically move to next stage** is selected to advance the case automatically.
5. In the **Set case status on stage entry field**, enter or select Pending-Validation to change the status of a case upon entering the Process stage.
6. To the right of the Process stage, click + STAGE to create a third stage in the case life cycle.
7. In the empty stage name field, enter Loan Approval to name the third stage.
8. In the contextual properties panel on the right, select **Resolve the case** to resolve the case when the stage completes.
9. In the **Set case status on stage entry field**, enter or select Pending-Approval to change the status of a case when it enters the Select Mortgage stage
10. In the **Resolution**-**status** field, ensure that Resolved-Completed is selected to indicate that the case was resolved with a successful outcome.



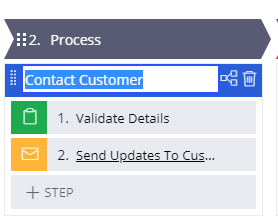
1. Click **Save** to save your progress on the Mortgage Request work flow. A red line is displayed across the bottom of the chevron for the **Loan Approval** stage to indicate that the stage resolves an open case.

Add steps to the case life cycle

1. Under the Select Mortgage stage, hover the pointer over  **+ PROCESS** and then click **+ STEP** to create a process with a single step in the stage.
2. Select the **Collect Information** step type to create a step to collect user input.
3. Type Mortgage Information as the name of the step.
4. Click **+ STEP > Collect information** to add a second step to the process and enter Personal Information as the name of the step.
5. Under the Select Mortgage stage chevron, enter Collect Mortgage Details to change the name of the process.
6. Hover the pointer over the **Select Mortgage** stage chevron to display three vertical dots to toggle the stage menu.
7. Click the stage menu and select **Add process > New process** to add a second process to the Select Mortgage stage.
8. Change the name of the second process to Send Acknowledgement.
9. On the Send Acknowledgement process, click the **+ Select Mortgage (1) STEP > More > Automations > Select** Persist Case
10. Select **+ STEP > More > Automations > Send email > Select** to add to the process a step to send an email.
11. Click the **Send email**  step and enter Send Acknowledgement as the name of the shape.
12. The Select Mortgage stage matches the following image.



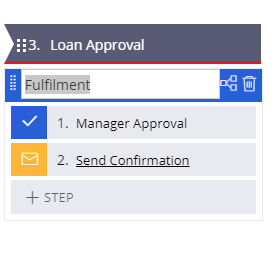
1. Under the Process stage, hover the pointer over **+ PROCESS** and then click **+ STEP** to create a process with a single step in the stage.
2. Select the **Collect Information** step type to create a step to collect user input.
3. Enter Validate Details as the name of the step.
4. Select **+ STEP > More > Automations > Send email > Select** to add to the process a step to send an email.
5. Click the **Send email** step and enter Send Updates To Customer as the name of the shape.
6. Under the Process stage chevron, enter Contact Customer as the name of the process. The Process stage matches the following image.



1. In the Loan Approval stage, add a single process with the following two steps to the stage.

|  |  |  |
| --- | --- | --- |
| **Step number** | **Step type** | **Step name** |
| 1 | Approve/Reject | Manager Approval |
| 2 | Send email | Send Confirmation |

1. Under the Loan Approval stage chevron, enter Fulfilment as the name of the process. The Loan Approval stage matches the following image.



1. Click **Save** to save your progress on the Mortgage Request work flow.
2. Close the Mortgage Request case type.

**Tip**:The next set of steps requires that you switch from App Studio to Dev Studio. When you change back to App Studio, the open Mortgage Request case type does not reflect any configuration performed in Dev Studio. To ensure that the Mortgage Request case type reflects any configuration changes completed using a different studio, close the case type before changing over to another studio.

Add a service level agreement to the case type

From the Dev Studio header, click Dev Studio > App Studio to switch studios and configure service level agreements (SLAs) for the Mortgage Request case type.

In App Studio, from the left navigation panel, click Case types > Mortgage Request to open the Mortgage Request case type.

On the Mortgage Request case type, click the Settings tab to configure case-level settings.

On the Settings tab, click Goal & Deadline to display the Goal & Deadline panel.

On the Goal & Deadline panel, enable the Consider goal and deadline option to display fields for configuring a goal and deadline for Mortgage Request cases.

Under Goal, enter the following values:

In the Days field, enter 0.

In the HH:MM:SS field, enter 02:00:00.

In the Urgency field, enter 25.

Under Deadline, enter the following values:

In the Days field, enter 0.

In the HH:MM:SS field, enter 04:00:00.

In the Urgency field, enter 45.

Add a service level agreement to the Manager Approval assignment

Click the Workflow tab to return to the case work flow.

On the Loan Approval stage, click the Manager Approval step.

In the contextual properties panel on the right, click the Goal & Deadline tab to configure an SLA for the step.

On the Goal & Deadline tab, enable the Consider goal and deadline option to display fields for configuring a goal and deadline to the step.

Under Goal, enter the following values:

In the Days field, enter 0.

In the HH:MM:SS field, enter 00:15:00.

In the Urgency field, enter 20.

Enable the Assignee option to notify the assigned case worker if the goal interval lapses before the step is completed.

Pega Platform provides a default message to send when an SLA interval lapses, or you can create a custom message. For this exercise, the default message is sufficient.

Click Deadline to configure behavior for the deadline interval.

In the Days field, enter 0.

In the HH:MM:SS field, enter 00:30:00.

In the Urgency field, enter 10.

Select the Manager option to notify the manager of the assigned case worker if the goal interval lapses before the step is completed.

Click Save to save your progress on the Mortgage Request case type.

Close the Mortgage Request case type.

Add a passed deadline interval to the service level

From the App Studio header, click App Studio > Dev Studio to switch studios and configure the passed deadline interval for the Manager Approval step.

In Dev Studio, from the left navigation panel, click Case types > Mortgage Request to open the Mortgage Request case type.

On the Loan Approval stage, click the Manager Approval step.

In the contextual properties panel on the right, click the Goal & Deadline tab to complete the configuration of the SLA for the step.

Click Open SLA to open the service level agreement record and configure the passed deadline interval.

On the service level agreement, scroll down to locate the Passed deadline area of the record.

In the Limit passed deadline events to field, enter 0 to repeat the interval until the step is completed.

In the Mins field, enter 15 to set the passed deadline interval to 15 minutes.

In the Amount to increase urgency field, enter 10 to increase the urgency of the assignment by 10 each time the interval lapses.

Under Actions, click Select Action to add an escalation action to the interval.

From the Perform Action drop-down, select Notify Manager to send a notification to the manager of the assigned case worker each time the passed deadline interval lapses.

Click Save to complete the configuration of the SLA for the Manager Approval step.

Click the Mortgage Request tab to return to the case type.

After you add a passed deadline interval to an SLA, you can no longer configure the goal and deadline from the case type. Instead, Pega Platform displays the message "This item has advanced configuration" when you attempt to view the goal and deadline from the case type.

Close the Mortgage Request case type.

Add an alternate stage to the case life cycle for Approval Rejections

From the Dev Studio header, click Dev Studio > App Studio to switch studios and add a Approval Rejection stage to the case life cycle.

In App Studio, from the navigation panel, click Case types > Mortgage Request to open the Mortgage Request case type.

To the right of the Loan Approval stage, click + STAGE to add another stage to the case life cycle.

In the empty field, enter Approval Rejection to name the stage.

On the Approval Rejection stage, click the Stage menu and select Set as alternate stage. The case life cycle updates to display the Approval Rejection stage below the Select Mortgage stage.

In the contextual properties panel on the right, select Resolve the case to resolve the case when the stage completes.

In the Resolution status field, enter Resolved-Withdrawn to set the status when the user cancels the Mortgage Request.

Enable the Resolve open child cases option to close any open child cases when the user cancels the Mortgage Request.

In the Resolution status of child cases field, enter or select Resolved-Withdrawn to set the status of the child case when the user cancels the Mortgage Request.

Under the Approval Rejection stage, select + STEP > More > Automations > Send email > Select to add to the process a step to send an email.

Click the Send email step and enter Send Rejection as the name of the shape.

Hover the pointer over + PROCESS and change the name of process to Approval Rejection.

Click Save to save your progress on the Mortgage Request work flow. A red line is displayed across the bottom of the chevron for the Approval Rejection stage to indicate that the stage resolves an open case.

Route assignments in the case life cycle

From the App studio header, click App Studio > Dev Studio to switch studios and configure assignment routing for the Mortgage Request case type.

In Dev Studio, from the navigation panel, click Case types > Mortgage Request to open the Mortgage Request case type.

On the Process stage, select the Validate Details step to route the case for approval.

In the contextual properties panel on the right, from the Route to drop-down select specific user

In the contextual properties panel on the right, below Route to drop-down select user name .

In the field below , enter or select branchofficer@BOM to route the approval to the to branchofficer@BOM .

On the Loan Approval stage, select the Manager Approval step to route the assignment.

On the General tab, Select Single level in Approval flow type

Select Specific user in the Route to

Select Username in the field below route to

Enter MortgageManager@BOM in the field below username

Click Save to save your progress on the Mortgage Request work flow.

Close the Mortgage Request case type.

Verify your work

Test the Mortgage Request case life cycle

Click Save and run to create an Mortgage Request case. The New: Mortgage Request form is displayed.

Fill the details on the Mortgage Information step

Click continue,to advance this case to advance the case to the Personal Information step.

Fill the details on the Personal Information step

Click Finish to complete the case

This case is advanced to the Persist Case step.

An acknowledgement mail is send to the Customer by Send Acknowledgement step.

Case is advanced to process stage, From the Actions menu select Validate Details step where case is routed to branch officer.

Case is then advanced to the Send Updates To Customer step where update mail is send to customer.

Case is then advanced to Loan Approval stage the mortgage case details are sent for approval to the manager by Manager Approval step

From the Actions menu, select Approval to approve or reject the case. Confirm that the assignment is routed to the MortgageManager@BOM. Click Approve to approve the case and advance to the Send Confirmation step.

Click Yes, advance this case to Send Confirmation. Confirm that the status of the case is set to Resolved-Completed, and that a second confirmation email is added to the case as an attachment.

Click Save and run to create another Mortgage Request case. The New: Mortgage Request form is displayed.

Advance the case to Loan Approval stage.

From Actions->Select Manager Approval step.

Select Approval to approve or reject the case.

Click Reject to reject the case and advance to the Approval Rejection stage. Confirm that the case status is set to Resolved-Rejected and that an email is added to the case as an attachment.