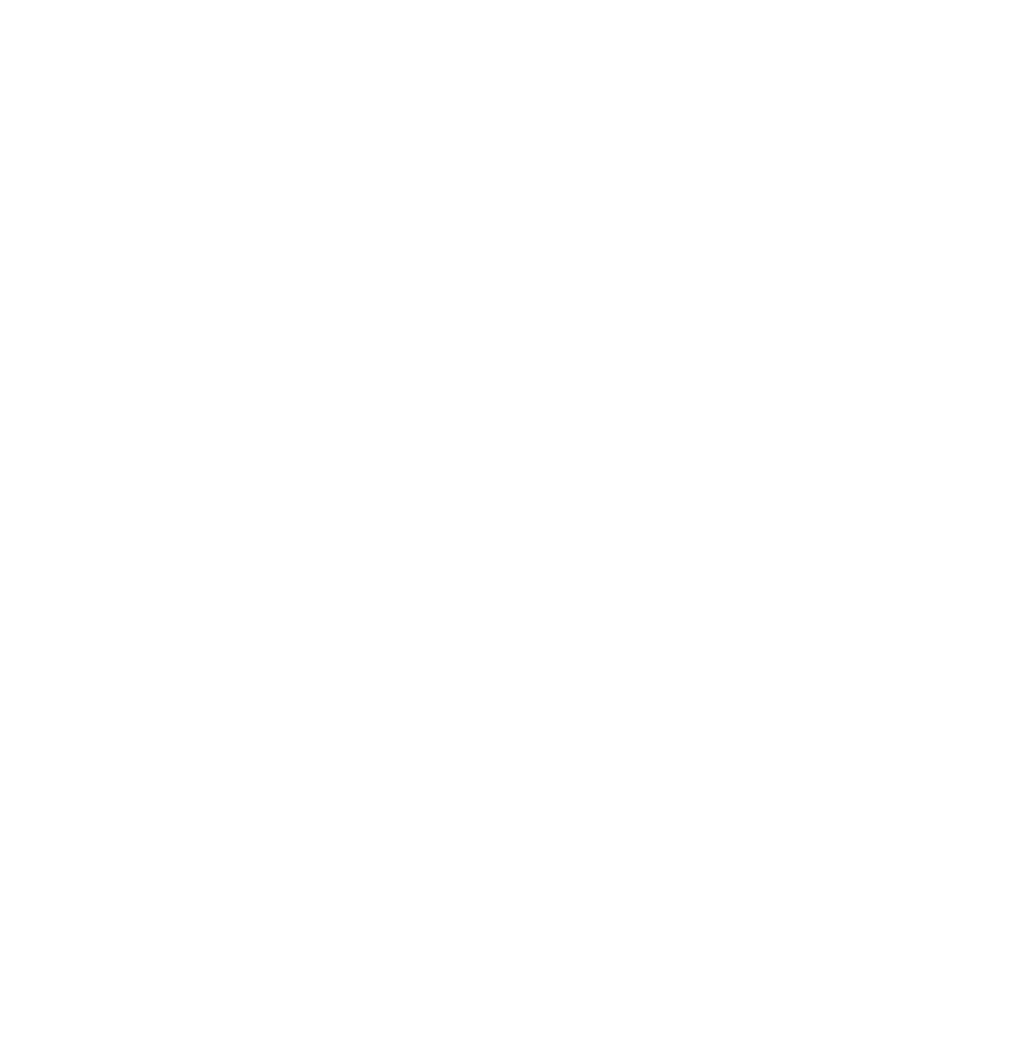
**MARKETING**



Pega Retail Advisor

## Implementation Planning Workbook

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**Implementation planning workbook**

This workbook is designed to help you define and document implementation requirements, and it is intended to be used with the "Initiation stage" and "Delivery stage" sections of the *Implementation Guide*. Some decisions will be made during your ongoing Direct Capture of Objectives (DCO) sessions, in the Delivery stage. This workbook includes the following sections:

* [Initiation stage worksheets](#_bookmark1)
* [Delivery stage worksheets](#_bookmark3)
* Delivery stage worksheets
* Pega Chat worksheets
* Pega Customer Service Social Engagement worksheets

Join the [Pega Customer Service forum](https://pdn.pega.com/communities) discussion on the PDN to get your questions answered as you start your implementation.

# Initiation stage worksheets

Use the following worksheets to define requirements during the Initiation stage of a product implementation:

* [Creating the application](#_bookmark2)

## Creating the application

The New Application wizard helps you create your application quickly. Use this worksheet to plan how you will complete each of the fields before you run the wizard.

***Table 1: Application settings***

|  |  |
| --- | --- |
| **Setting** | **Value** |
| Application type | Customer Service 7.31 |
| Application name | <user-defined application name> |
| Use Customer Decision Hub? | <yes or no> |
|  |  |

***Table 2: Case types***

|  |
| --- |
| **Application case types to include (or ALL)** |
|  |
|  |
|  |
|  |
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***Table 3: Channels***

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| --- |
| **Channels to include (or ALL)** |
|  |
|  |
|  |

***Table 4: Data types***

|  |
| --- |
| **Application data types to include (or ALL)** |
|  |
|  |
|  |
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|  |

**Delivery stage worksheets**

Use the following worksheets to define requirements during the Delivery stage of the implementation:

* [Case type modifications](#_bookmark4)
* [Defining other assessment options](#_bookmark5)
* [Data model](#_bookmark6)
* [Application behavior](#_bookmark7)
* [User experience](#_bookmark9)
* [Integration](#_bookmark12)
* [Security and organization structure](#_bookmark13)
* [Reporting](#_bookmark16)

## Case type modifications

You define case types as part of your DCO sessions. This worksheet helps you in the planning of new case types, changes to existing case types, modifications to stages and processes, and defining case type attributes.

|  |  |  |
| --- | --- | --- |
| **Case type** | **Description** | **Stages** |
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***Table 5: Class group mapping***

|  |  |  |
| --- | --- | --- |
| **Class name** | **Class group setting** | **Database table** |
|  |  |  |
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|  |  |  |
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|  |  |  |
| --- | --- | --- |
| **Class name** | **Class group setting** | **Database table** |
|  |  |  |
|  |  |  |
|  |  |  |
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***Table 6: Locking behavior***

|  |  |  |
| --- | --- | --- |
| **Case type** | **Lock when** | **Lock timeout** |
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## Defining other assessment options

You can define other assessment options that are used with a discharge plan.

***Table 7: Types of assessments***

|  |
| --- |
| **Option** |
|  |
|  |
|  |

## Data model

Use this worksheet to identify which data types you want to associate with your application, source system for the data, how to connect to that source, property name and type (for example, Text, Integer, TrueFalse).

|  |  |  |  |
| --- | --- | --- | --- |
| **Data type:** *<your data type>* | | | |
| **Source system:** *<your system of record>* | | | |
| **Protocol:** *<method of connecting; ex. SOAP>* | | | |
| **Property name** | **Source field name** | **Type** | **Size** |
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## Application behavior

The worksheets included in this section are for planning application-specific behavior.

* [Application settings](#_bookmark8)

### Application settings

|  |  |
| --- | --- |
| **Setting** | **Value** |
|  |  |
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## User experience

The worksheets included in this section are for planning the user experience.

* [Portals](#_bookmark10)
* [Skinning](#_bookmark11)

### Portals

|  |  |  |
| --- | --- | --- |
| **Portal** | **Section** | **Modifications** |
|  |  |  |
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### Skinning

Testing keywords:

|  |  |  |
| --- | --- | --- |
| **Component** | **Style** | **Style sheet** |
|  |  |  |

|  |  |  |
| --- | --- | --- |
| **Component** | **Style** | **Style sheet** |
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## Integration

The worksheets included in this section are for planning integration points.

|  |  |  |  |
| --- | --- | --- | --- |
| **System of record** | **Data needed** | **Int. Exists** | **Protocol** |
|  |  |  |  |
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## Security and organization structure

The worksheets included in this section are for planning security and identifying the organization structure.

* [Security model](#_bookmark14)
* [Organization structure](#_bookmark15)

### Security model

Testing keywords:

***Table 8: Authentication***

|  |
| --- |
| **Authentication scheme** |
|  |
|  |

***Table 9: Authorization***

|  |  |  |
| --- | --- | --- |
| **Access group** | **Portal** | **Roles** |
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***Table 10: Privileges***

|  |  |  |  |
| --- | --- | --- | --- |
| **Privilege** | **Roles** | | |
| **CSR** | **Manager** | **SysAdmin** |
| Perform | x |  |  |
| Update | x |  |  |
| Reopen | x |  |  |
| AssignExpertSkills |  | x | x |
| PegaCS AccessExpertAssist | x | x | x |
| QualityReview |  | x | x |

|  |  |  |  |
| --- | --- | --- | --- |
| **Privilege** | **Roles** | | |
| **CSR** | **Manager** | **SysAdmin** |
| UpdateDialog |  | x | x |
| UpdateCampaigns |  | x | x |
| UpdateCoachingTips |  | x | x |
| UpdateHotKeys | x | x | x |
| UpdateHotKeysAdmin |  |  | x |
| UpdateNavigation | x | x | x |
| ViewManagerContent |  | x | x |
| AccessPegaCSAccountManager | Reports |  | x |
| AccessPegaCSManagerReports |  | x | x |
| AccessPegaCSSalesManagerRep | orts |  | x |
| PegaCSAddFavorite |  | x | x |
| PegaCSEnableLinkedIn |  | x | x |
| EnableNewsConfig |  | x | x |

### Organization structure

***Table 11: Divisions and Units***

|  |  |
| --- | --- |
| **Divisions** | **Units** |
|  |  |
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***Table 12: Operator Skills***

|  |  |
| --- | --- |
| **Operator Role** | **Associated Skills** |
|  |  |
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| --- | --- |
| **Operator Role** | **Associated Skills** |
|  |  |
|  |  |

***Table 13: Work groups***

|  |  |
| --- | --- |
| **Work groups** | **Description** |
|  |  |
|  |  |
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***Table 14: Operator Calendar***

|  |  |  |
| --- | --- | --- |
| **Operator Role** | **Location** | **Associated Calendar** |
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## Reporting

This worksheets included in this section are for planning reporting requirements.

***Table 15: Report inventory***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Purpose** | **Source** | **Recipient** | **Frequency** | **Key metric** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Purpose** | **Source** | **Recipient** | **Frequency** | **Key metric** |
|  |  |  |  |  |
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***Table 16: Dashboard reports***

|  |  |  |
| --- | --- | --- |
| **Report** | **Add/Remove?** | **Format** |
|  |  | Examples: Pie Chart, Bar Graph |
|  |  |  |
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