Smart Dispute for Issuers

Implementation Planning Workbook

7.21

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Feedback

 If you have suggestions or comments for how we can improve our materials, send an email to AppDocBug@pega.com.

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Implementation planning workbook

This workbook was 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](#_Ref-1450052805)
* [Delivery stage worksheets](#_Ref-1743298378)

Initiation stage worksheets

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

* [Documenting application contents](#_Ref56192972)
* [Creating the application](#_Ref-1210014952)

Documenting application contents

Identify initial key differences between the Smart Dispute for Issuers application and your specific application needs. These differences will be the focus of your DCO sessions where you will develop your application specifications and requirements.

Key differences

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Creating the application

New Application wizard helps you create your application quickly. You can use this sheet to plan how you are going to complete each of the fields before you run the wizard.

Application settings

| Setting | Value |
| --- | --- |
| Application name |   |
| Built on application  | Smart Dispute for Issuers 7.21 |
| Application structure | Framework and Implementation |
| Organization |   |
|   |   |

Business objectives

|  |
| --- |
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|   |
|   |

Case types

| Application case types to include (or ALL) |
| --- |
|   |
|   |
|   |

Data types

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

Delivery stage worksheets

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

* [Case type modifications](#_Ref-948882748)
* [Data model](#_Ref1728920183)
* [Application behavior](#_Ref-528847521)
* [User experience](#_Ref1454025006)
* [Integration](#_Ref787220389)
* [Security and organization structure](#_Ref-1384541509)
* [Reporting](#_Ref-751327370)

Defining the case type modifications

You will 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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Class group mapping

| Class name | Class group setting | Database table |
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Defining the data model

Use this sheet 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 settings

The following worksheet will help you to plan your application settings.

| Setting | Value |
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User experience

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

Portals

| Portal | Section | Modifications |
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Skinning

| 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

Authentication

| Authentication scheme |
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|   |
|   |

Authorization

|  Access group  | Portal |  Roles  |
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Organization structure

Divisions and Units

| Divisions | Units |
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Operator Skills

| Operator Role | Associated Skills |
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Work groups

| Work groups | Description |
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Operator Calendar

| Operator Role | Location | Associated Calendar |
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Reporting

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

Report inventory

| Purpose | Source | Recipient | Frequency  | Key metric |
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Dashboard reports

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