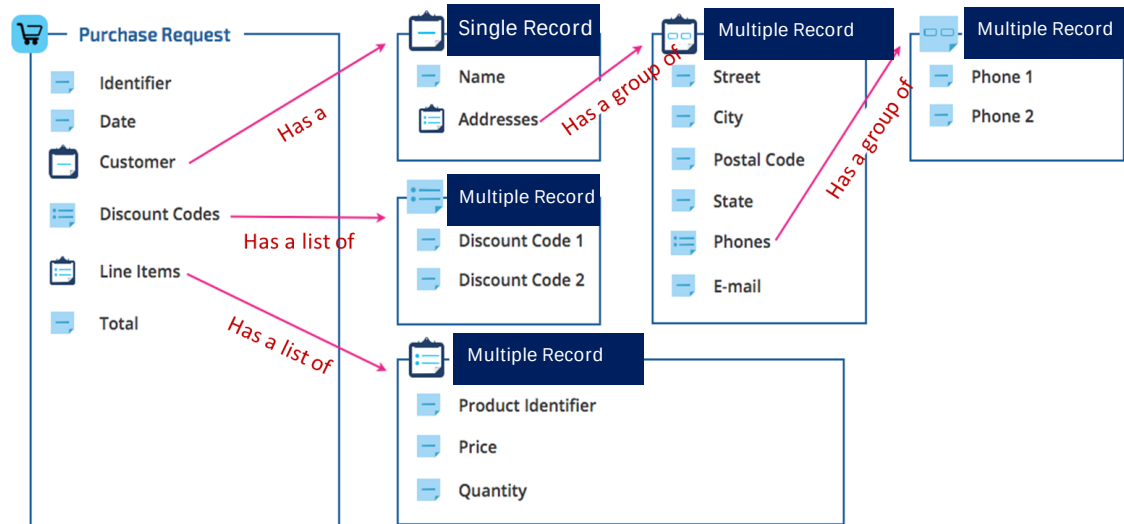


Data and integration

23%

Data modeling

- The data model brings information into your application in a format that makes sense for a business.
- Data modeling allows, viewing data and case type relationships, creating new data types, and updating data type records.



Data records vs. case records

Data records

- Represents key business entities, for example, Customers
- Contain all the fields necessary to describe it
 - Identifier
 - Name
 - Address
 - Date of creation

Data object is a template of the data that will be stored as a data record.

Case records

- Represents business transactions, such as assistance request
- Contain the fields necessary to describe a transaction, including:
 - Customer information: Identifier, name, address, and date of creation
 - Vehicle information: location (address, city, state), type (make, model, year, color)

Case type is a template of the business process which captures the data stored as a case record.

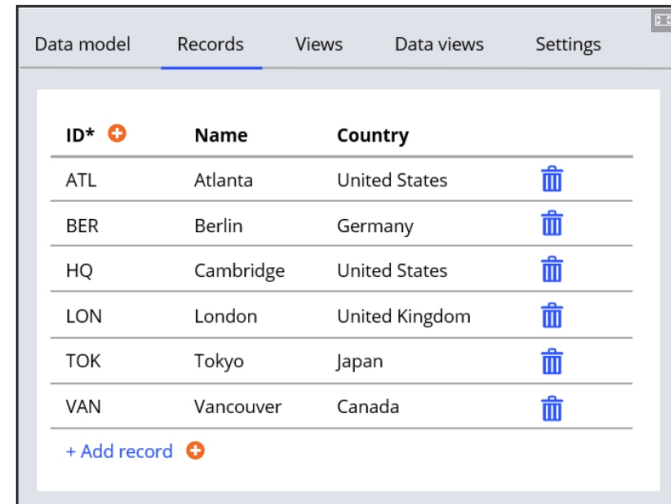
Local data storage and external data sources

Local data storage

- pyGUID – Globally unique ID created by default when created in App Studio
- Stored locally in a database table in Pega. Adding records in App Studio or Dev Studio creates a record in the mapped local database table in Pega. Deleting records removes them from the database table.

External data sources

- Retrieve records from an external database or web service.
- Configured using data pages.



ID* 	Name	Country	
ATL	Atlanta	United States	
BER	Berlin	Germany	
HQ	Cambridge	United States	
LON	London	United Kingdom	
TOK	Tokyo	Japan	
VAN	Vancouver	Canada	
+ Add record 			

The integration designer

- Comprehensive view
- Displays data objects, case types, and data types
- Create data objects
- Access data objects
- Update data objects

APP STUDIO Application : Showcase Preview DEVELOPMENT

← Data objects and integrations New

Data model
Visualize all the data in your application View

Integration map
Visualize where data is coming from View

All systems Search data objects... 5 data objects

Data objects	Data pages	Referenced By	Systems of record
Approver		Job Applicant Interview	
Interviewer	Interviewer List Interviewer +1 more	Job Posting Job Applicant	Pega
Job Posting	Job Posting List Job Posting	Job Applicant Interview	Pega
Required Skills	List Required Skills Required Skills +2 more		Pega
Skills	List Skills Skills		Pega

The data model

The data model helps with understanding the relationships among case types, data objects, and properties in an application. To model data, you need the following components:

Data objects

- Categories of data that have fields, field mappings, and connections to data sources.

Fields

- Properties that store and format the data in your application.

Data sources

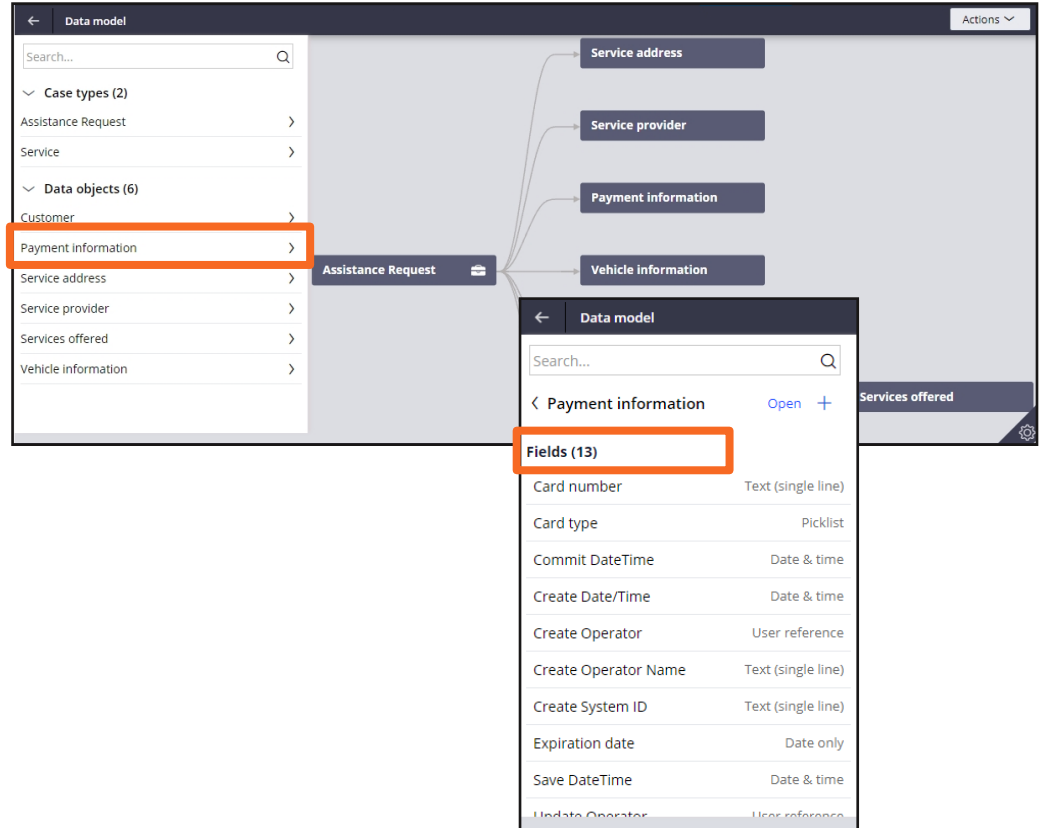
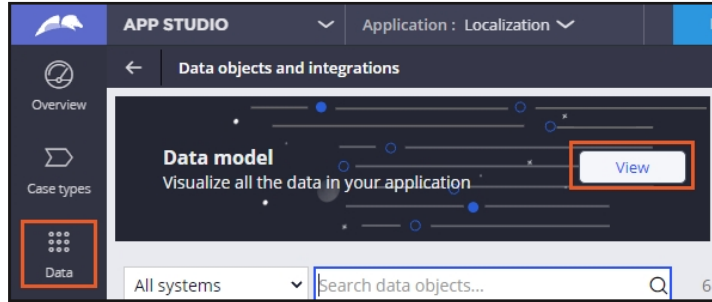
- Resources, which can be real or simulated, that host the data.

Field mappings

- Logic that links or transforms the fields in a data source to the fields in an application.

View the data model

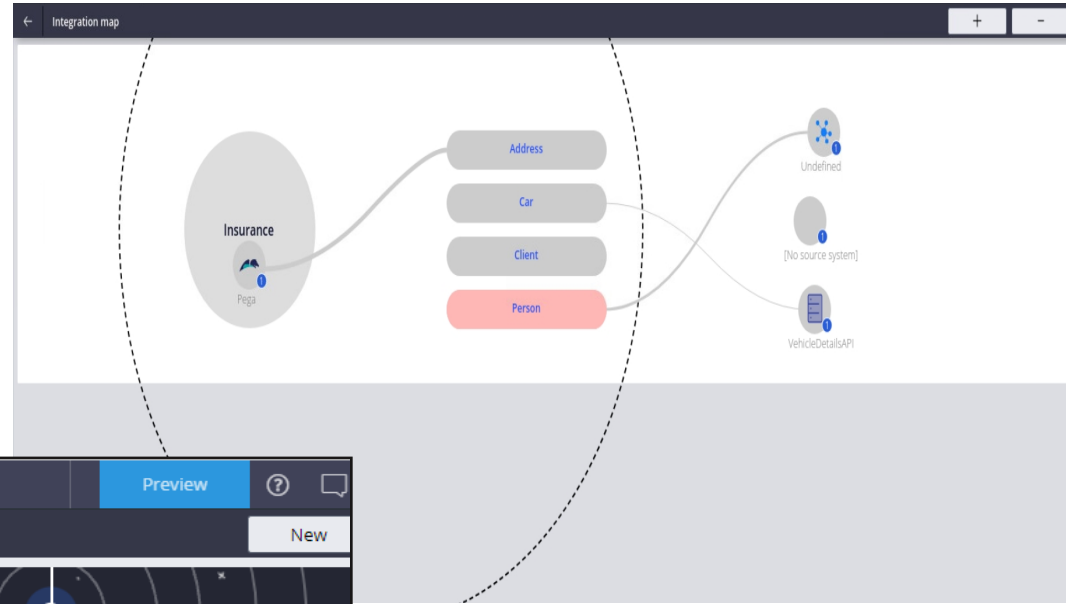
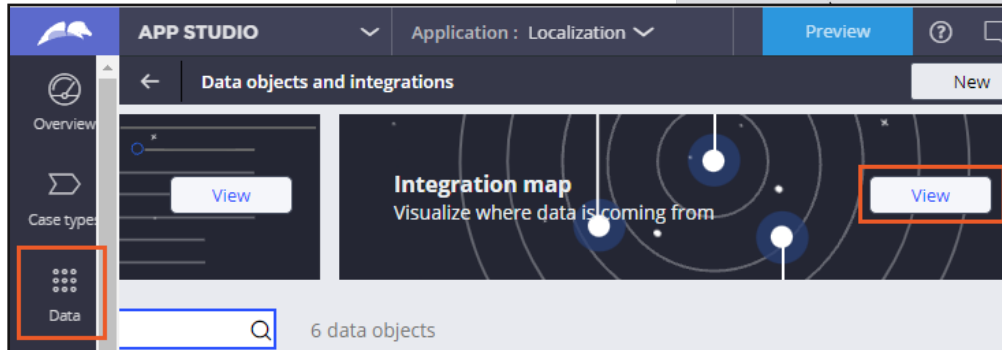
App Studio > Data > View



View integration map

App Studio > Data > View

Use the interactive integration landscape to understand the relationships between data and data types and systems of record.



Declare expression

App Studio

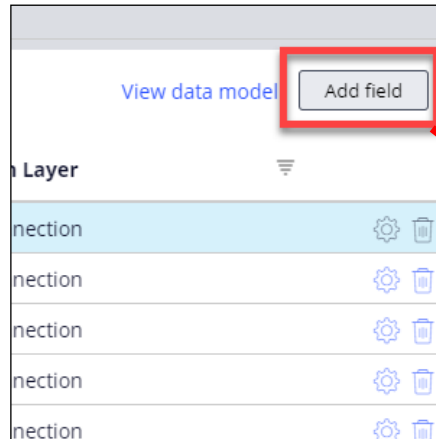
Data Model > Add field >
Advanced section

Select the check box to
indicate it's a calculated field.

Use Expression or a Decision
Table from the calculation
drop down. Click Submit.

Verify the Declare Expression
rule in the Dev Studio

App Studio > Data Model > Add field

A screenshot of the 'Add field to Current Address' dialog. The dialog has a title bar 'Add field to Current Address' and a close button. It contains the following fields: 'Field name' (text input, value: 'Test'), 'Type' (dropdown menu, value: 'Text (single line)'), 'Advanced' section (expanded), 'ID' (text input, value: 'Test'), 'Description' (text area), 'Max length' (text input, value: '256'), 'Expected length' (text input), 'This is a calculated field (read-only)' (checkbox, checked), 'Calculation' (dropdown menu, value: 'Use expression'), and 'Area + " " + .Pincode' (text input). Below the 'Calculation' dropdown, there is a note: 'Use "." (dot) for field prompts to enter a simple equation such as: Amount*.Quantity'. At the bottom, there are three buttons: 'Cancel', 'Submit & add another', and 'Submit'.

Declare expression

- When a property is created as a calculated field in the App Studio, Pega automatically creates a Declare Expression in the Dev Studio.
- Switch to Dev Studio to view the Declare Expression in the Data class.

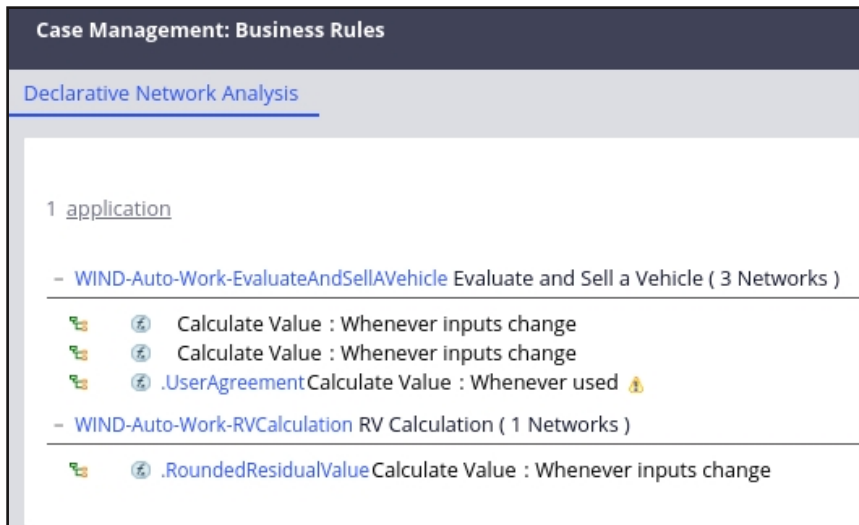
The screenshot displays the Pega Dev Studio interface. On the left sidebar, the 'DEV STUDIO' tab is highlighted. Under the 'Classes' section, the 'WIND-Mobile_C-Data' class is selected, and the 'Declare Expression' option is highlighted. The main workspace shows the 'Declare Expression: .Test [Available]' configuration. The breadcrumb path is 'CL: WIND-Mobile_C-Data-CurrentAddress > ID: .Test RS: ServiceLevelAgreementC [Branch: ServiceLevelCLab]'. The 'Expressions' tab is active, showing the 'Overview' section. Under 'Build Expressions', there is a 'Set Test =' field with a dropdown menu set to 'Value of' and a text input field containing '.Area + " " + .Pincode'. The 'Check out' button is visible in the top right corner.



Declarative network display

Dev Studio

- Configure menu > Select Case Management > Business Rules > Declarative Network.
- Click application to select the app for review.
 - To view the rule and related properties, click the "Display this top-level declarative network" icon.
 - Open the declare expression, click the Display declare expression icon.
 - Open the target property, click the property name.
 - Open the class to which a rule belongs, click the class name.



Declarative network analysis

- To identify the relationships between fields, the Pega Platform establishes and updates a network of calculations for an application.
- When you define a field calculation, the Pega Platform adds that calculation to the calculation network.
- This calculation network allows the Pega Platform to update all relevant fields whenever a value changes.
- Shows the target property and all potential inputs that might affect its final value.
- Unit test a Declare Expression rule to reduce the number of processing errors.



Users add an item to the list or update the quantity of an item already in the list. Pega Platform calculates the **Line total as $\text{.UnitPrice} * \text{.Quantity}$** .

The updated line total triggers a calculation to update the **order total**, using the **Sum of function** to add each line total in the list of items.

You added the following items to your order:

Item	Quantity	Unit price	Line total
Team logo hat	3	USD 7.75	USD 23.25
Team logo magnet	4	USD 4.25	USD 17.00

Order total: USD 40.25

Tax (8%): USD 3.22

Your cost: USD 43.47

The updated order total triggers a calculation to update the **tax** applied to the order as the **value of $\text{.TaxRate} * \text{.OrderTotal}$** .

The updated tax amount triggers a calculation to update the **total cost** as the **value of $\text{.Tax} + \text{.OrderTotal}$** .

Validation

Validation is used to ensure that data is correctly formatted and valid before being input into an application. This allows the system to process the information without errors.

Use validation rules when you cannot predict or control the value users enter in a form.

The data must:

- Be the right type
- Fit the business logic
- Be restricted to possible values

The screenshot shows the 'Validation conditions' configuration window in Pega. At the top, there's a title bar with a close button. Below it, the 'Validate' section is set to '.Employee.pyPostalCode'. There are two checkboxes: 'Required' (unchecked) and 'Enable conditions' (checked). A 'Select a function' dropdown is set to 'Validation of [Property Name] using [Edit Validate Name] fails', with a 'Clear' button next to it. Below this, an 'If' condition is configured: 'Validation of .Employee.pyPostalCode using USZipCode fails'. A plus sign icon is to the left of the 'Message' section. The 'Message' section contains the text 'Please enter a valid ZIP code'. Below the message, the 'Continue validation' checkbox is checked. At the bottom, there are 'Cancel' and 'Submit' buttons.

Pega also provides property types, controls, and rules to support validation requirements.

Validation rule types

There are two types of validation rules: validate and edit validate.

- Validate rules compare a property against a condition when the user submits a form.
- Edit validate rules test single value, value list and value group properties for patterns. This rule requires knowledge of Java.

Property: Email ID [Available]
CL: WIND-Auto-Data-OwnerDetails ID: EmailID RS: Auto:01-01-01

General **Advanced** Specifications History

Validation

Max length

Expected length

Override sort function

Access when

Edit input

Use validate
ValidEmailAddress

Edit Validate: Validate if the String value entered is a valid email address
ID: ValidEmailAddress RS: Pega-ProCom:08-01-01

Java History

Java Source

```
1 if (theValue == null || theValue.trim().equals  
2 try {  
3     javax.mail.internet.InternetAddress emailAddr  
4     emailAddr.validate();  
5 }  
6 catch (javax.mail.internet.AddressException ex  
7     return false;
```

Validation conditions

Validate .Employee.pyPostalCode ☐ Required ☒ Enable conditions

Select a function Validation of [Property Name] using [Edit Validate Name] fails [Clear](#)

If
Validation of .Employee.pyPostalCode using USZipCode fails

Please enter a valid ZIP code

Flow rule validation

Implementation

- Validate a user form/flow action by opening the Flow rule.
- In the Flow rule right click on the connector and open the flow action you like validated.
- In the Validation tab specify the validation rule you want to use.

The image illustrates the process of validating a flow rule in Pega through three sequential screenshots:

- Top Left:** A list of steps in a flow rule. Step 1 is '1. Collect requester inf...' and Step 2 is '2. Send email to reviewer'. A red box highlights a connector icon (two overlapping squares) next to Step 1.
- Top Right:** A workflow diagram showing a sequence of actions: a green circle (start), a green rounded rectangle 'Collect requester information', a yellow rounded rectangle 'Send email to reviewer', and a red circle (end). An orange arrow points from the connector in the top-left screenshot to the connector between the 'Collect requester information' and 'Send email to reviewer' actions in this diagram.
- Bottom:** The 'Edit Flow Action: Enter customer information [Available]' configuration screen. The 'Validation' tab is selected. Under 'Validation criteria', the text states: 'Occurs upon submit of the Flow Action and prior to executing any post-processing actions.' Below this, the 'Validate' section shows a dropdown menu with 'ValidateExpirationDate' selected. At the bottom, there is a checkbox labeled 'Update status upon successful validation?' which is currently unchecked.

Validation – Case data model

Case Type > Data model tab > Validations

Edit case type: Job Applicant

Actions ▾ Save and run Save X

Workflow Data model Views Settings Test cases

Fields Validations

☐ Show reusable fields ⓘ

Property	Collect Resume	Recruiter Review	Interview	Decision	Offer
401 K match					
Applying for					
Average Rating					
Car Supplement					
Compensation					
Compensation increase		Add entry validation			
Compensation increase rational					
Compensation Recommendation					
Email		→ Stage entry Please enter an email address to c...			
Employment History					

Stage entry validation

When conditions are met ⓘ

Group ANDs ▾

Email ▾ is empty ▾ + -

Then display error message as ⭐

Please enter an email address to continue.

To validate stage entry for the stages

- ☐ Collect Resume
- ☒ Recruiter Review
- ☐ Interview
- ☐ Decision

Cancel Submit

Data transforms

Use case

Data Transforms are used to:

- Initialize values in a case type
- Manipulate data between assignments
- Populate property values in other artifacts
- Convert data from one type to another

Track by Reference Number ×

* Indicates required field

 Upcoming Changes: Limiting display of reference number tracking details for improved security. ▼

Shipment Type

☒ Package
☐ Freight
☐ Mail Innovations

Shipment Reference * [Help](#) ⓘ

Shipper Account

Date Range / From *  **To *** 

Destination Country or Territory   **Destination ZIP/Postal Code**

[Track](#) [Cancel](#)

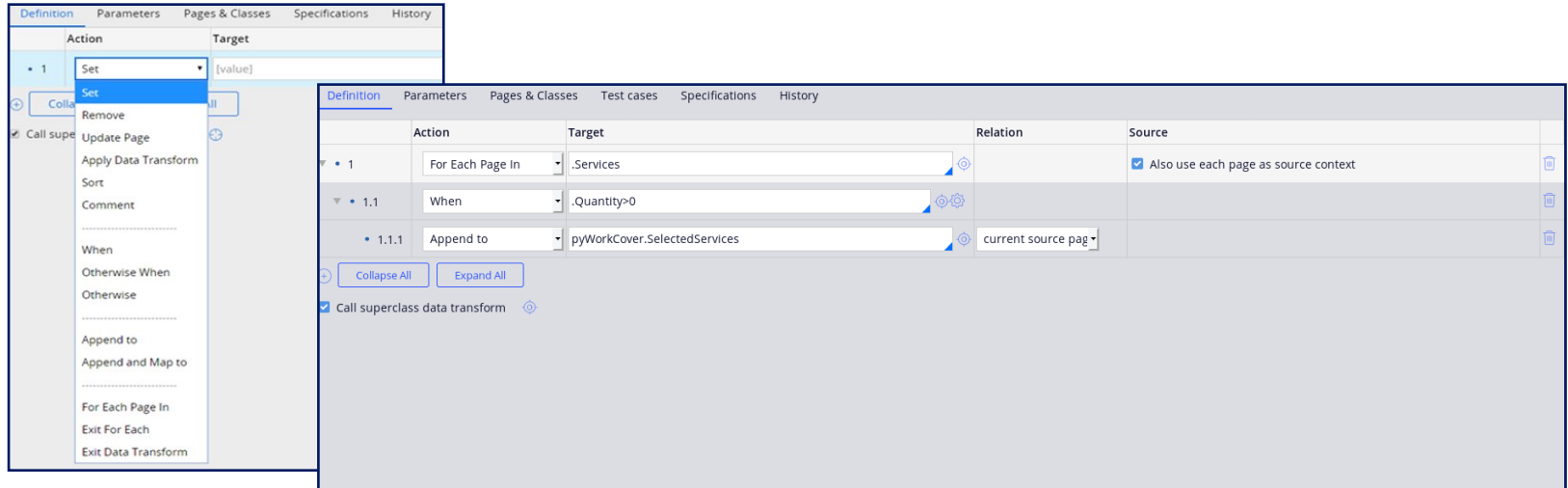
During case processing default values can be initialized. For example, today's date can be prepopulated for the starting date range. The To: date could be populated with today's date + 30 days.

Data transform actions

Configuring a data transform requires specifying an action on a property or page and then entering the values for the transform.

Actions are the individual operations such as Set a property, Update Page, Append to, Remove, When, or a Page on the clipboard.

The Action is specified in each row on the Definition tab of a data transform.



The screenshot displays the 'Definition' tab of a data transform configuration in Pega. The interface is divided into two main sections. The left section shows a tree view of the data transform structure with a dropdown menu open for selecting an action. The right section shows a table of actions and their targets.

Left Section: Action Selection Menu

- Set
- Remove
- Update Page
- Apply Data Transform
- Sort
- Comment
- When
- Otherwise When
- Otherwise
- Append to
- Append and Map to
- For Each Page In
- Exit For Each
- Exit Data Transform

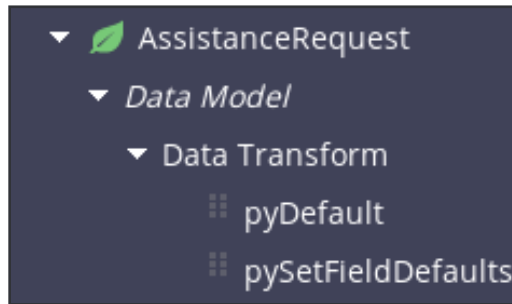
Right Section: Action Table

Action	Target	Relation	Source
For Each Page In	.Services		☒ Also use each page as source context
When	.Quantity>0		
Append to	pyWorkCover.SelectedServices	current source pag	

Below the table, there are buttons for 'Collapse All' and 'Expand All', and a checkbox for 'Call superclass data transform' which is checked.

pyDefault and pySetFieldDefaults

- **pyDefault** data transform is invoked when a case is created.
 - It is used to set default values for cases.
- **pySetFieldDefaults** data transform is used to initialize default field values.
 - The case designer wizard will configure it.
- **pyDefault** uses the Apply Data Transform action to call pySetFieldDefaults.



Edit: Data Transform: pySetFieldDefaults [Available]

CL: GoGo-GoGoRoad-Work-AssistanceRequest ID: pySetFieldDefaults RS: GoGoRoad:01-01-01

Delete Actions Save

This record has 1 justified warning [Review/Edit]

Definition Parameters Pages & Classes Test cases Specifications History

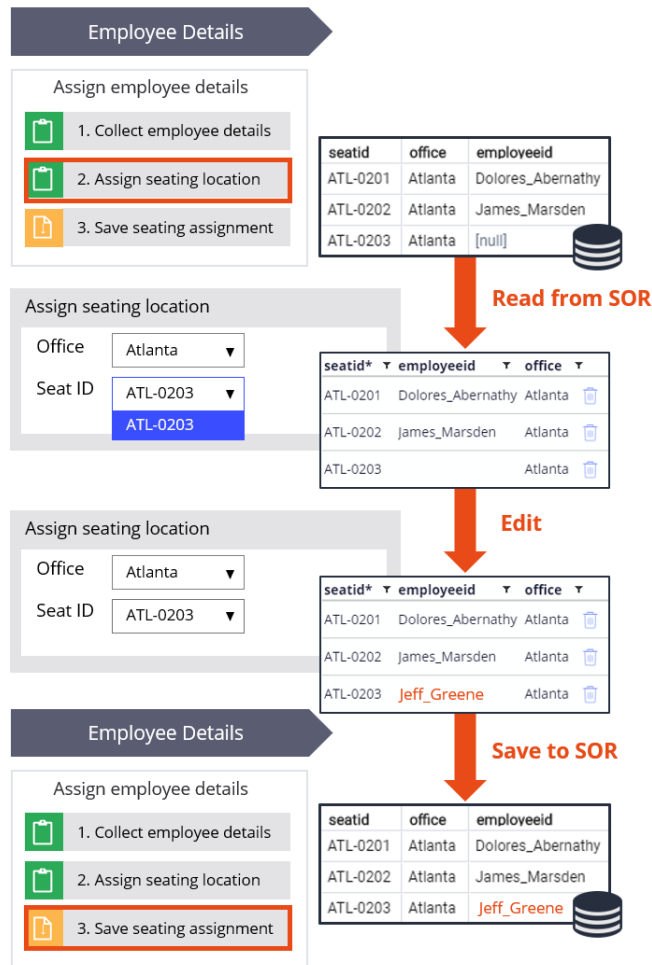
	Action	Target	Relation	Source	
1	Comment	Automatically generated by the system for populating data during AssistanceRequest processing.			
2	Set	.VehicleInformation.pyLabel	equal to	" "	Select values +
3	Set	.PaymentInformation.pyLabel	equal to	" "	Select values +
4	Set	.ServiceAddress.pyLabel	equal to	" "	Select values +
5	Set	.ServiceProviders(1).pyLabel	equal to	" "	Select values +
6	Set	.Customer.pyLabel	equal to	" "	Select values +

Collapse All Expand All

☒ Call superclass data transform

Data page

- A mechanism to access data from any source without knowing the physical location.
- Defines the data associated with a data object and contains the data object's connection configuration to a system of record.
- Separate the application from the integration with the system of record.
- Access data from a range of sources on-demand.
- Connects data pages of different types, enabling data virtualization.
- Also referred to as data view.



Data page structure

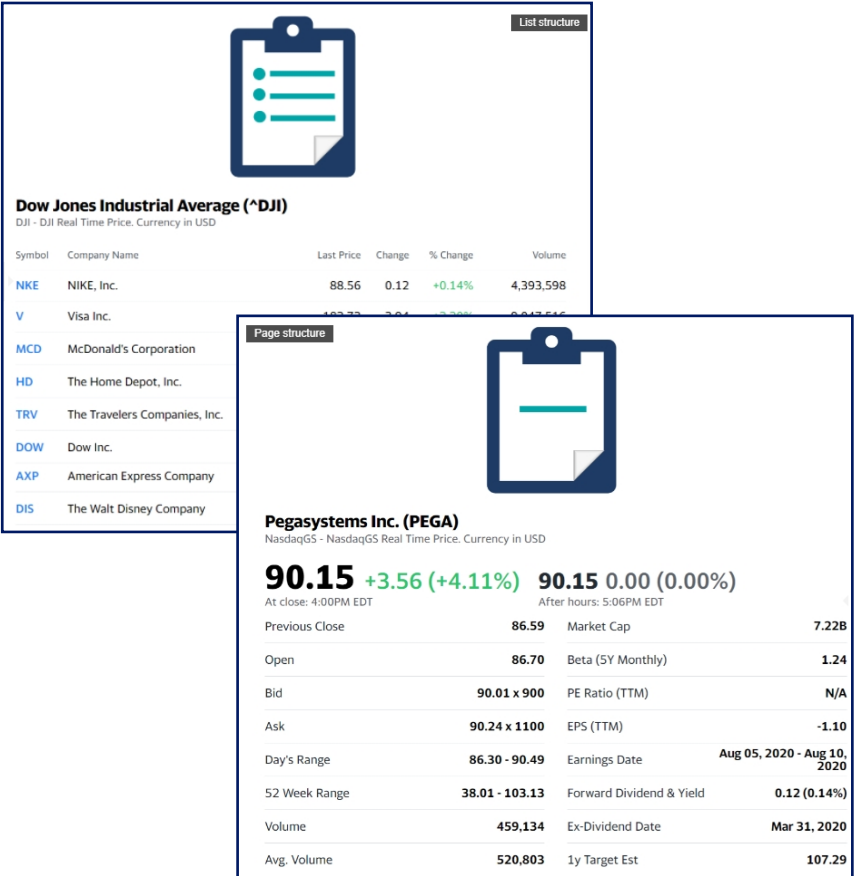
The structure of the page determines whether the data page can contain one item or many items.

When using a list structure, the data page embeds the list items in an ordered array named pxResults.

- To access a specific record within the list, use the syntax

`DataPageName.pxResults(n)`, where `n` is the index of the ordered array that corresponds to the record.

Page structure represents a single page or class instance.



List structure

Dow Jones Industrial Average (^DJI)
DJI - DJI Real Time Price. Currency in USD

Symbol	Company Name	Last Price	Change	% Change	Volume
NKE	NIKE, Inc.	88.56	0.12	+0.14%	4,393,598
V	Visa Inc.	163.73	3.04	+1.86%	6,813,546
MCD	McDonald's Corporation				
HD	The Home Depot, Inc.				
TRV	The Travelers Companies, Inc.				
DOW	Dow Inc.				
AXP	American Express Company				
DIS	The Walt Disney Company				

Page structure

Pegasystems Inc. (PEGA)
NasdaqGS - NasdaqGS Real Time Price. Currency in USD

90.15 **+3.56 (+4.11%)** **90.15** **0.00 (0.00%)**
At close: 4:00PM EDT After hours: 5:06PM EDT

Previous Close	86.59	Market Cap	7.22B
Open	86.70	Beta (5Y Monthly)	1.24
Bid	90.01 x 900	PE Ratio (TTM)	N/A
Ask	90.24 x 1100	EPS (TTM)	-1.10
Day's Range	86.30 - 90.49	Earnings Date	Aug 05, 2020 - Aug 10, 2020
52 Week Range	38.01 - 103.13	Forward Dividend & Yield	0.12 (0.14%)
Volume	459,134	Ex-Dividend Date	Mar 31, 2020
Avg. Volume	520,803	1y Target Est	107.29

Data page scope

- The scope determines the visibility of the page contents within the application.
- A data page scope can be node, thread, or requestor.

Thread

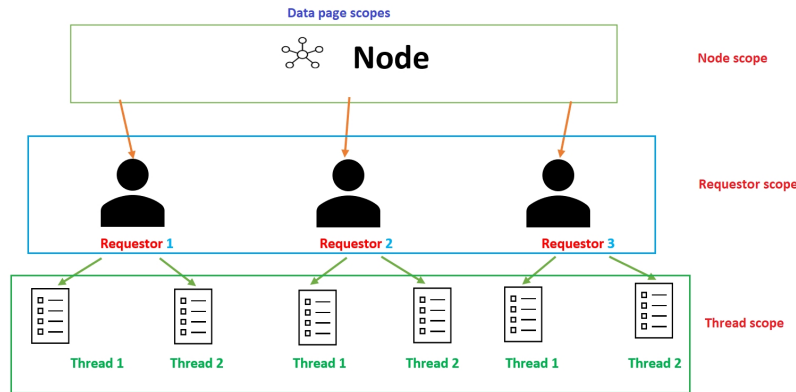
The page is created in a single requestor thread and can be accessed as often as needed by processing in that thread.

Requestor

The requestor can access the page(s) loaded across all threads.

Node

Any requestor executing on the current node can access the pages.



Data page related terms

Data record – Values for the fields associated with a data type stored outside the case.

Data type – Define an object and contain all the fields to describe its structure.

System of record (SOR) – Denotes where data associated with a data type is located: no SOR, Pega or External.

Local data storage – Storage of data for a data type, without having to create or maintain database tables.

Data reference – A field configured to display on a form that at run-time has a list of data records or data type instances.

Data save options

The data save options for a savable data page details how saves are performed. You specify the data save plan in the data save options section of the savable data page.

You can specify multiple save options, where each save option is associated with a when rule that determines when that save option is used.

The data save options include Database save, Activity, Connector, Robotic automation, and Robotic desktop automation.

Data save options

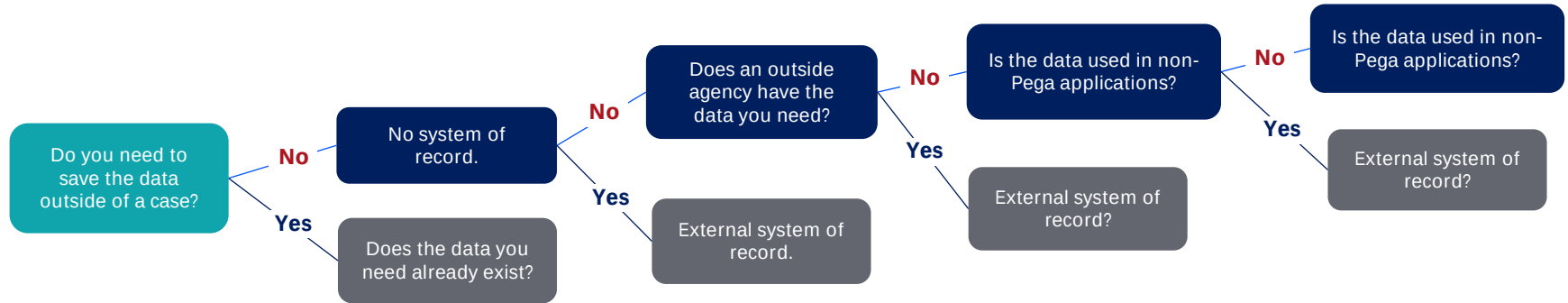
If there are multiple save options, every WHEN is evaluated and the OTHERWISE save option is only used if all WHENs evaluate to false.

	Save type *	Class name *	Data transform	Validate rule
1	Database save ▼ Database save Connector Robotic automation Robotic desktop automation Activity	Onboarding TGB-Hiring-Work-Onboarding		

Sourcing

Data objects can be sourced locally from a Pega Platform system of record, from an external system of record, or not associated with any system of record.

Determine how to source a data object by considering the questions in the image.



Does the data need to be saved outside of the case?

No, data object with no SOR

Does the data already exist?

Yes, data object with existing external SOR database

Does an outside agency have the data needed?

Yes, data object with external SOR connection

Is the data used in non-Pega applications?

No, data object with local SOR

Yes, data object with external SOR in a third-party application

Simulated external data source

App Studio

In App Studio, when you create a data view, you identify the source of the data.

The same data views are created regardless of whether you simulate the source data or connect to a system of record (actual data).

Data objects and integrations New

Data model
Visualize all the data in your application View

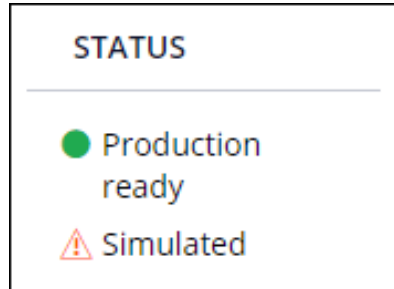
Integration map
Visualize where data is coming from View

All systems ▼ vehicle model Q 1 data object

Data objects	Data views	Referenced By	Systems of record
Vehicle models	List Vehicle models SIMULATED	Vehicle models SIMULATED	 Undefined ⋮

Simulated external data source

- Use Dev Studio to get an overview of simulated data pages
- In Dev Studio, click Configure > Data Model > View external data entities to open the landing page and get an overview of simulated data pages in your application.
- Source systems marked with a green dot are production-ready. Source systems marked with an orange triangle are simulated



Simulated external data source

Dev Studio

- Use Dev Studio to identify the source data directly on the data page.
- You select the Simulate data source option on the data page to simulate the data source.
- Then, enter or select the name of the system to use for simulated data.
- You can simulate a data page by using a data transform, activity, report definition, or lookup. Selecting simulation disables any data source configured

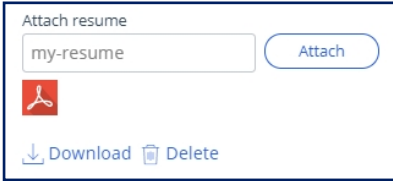
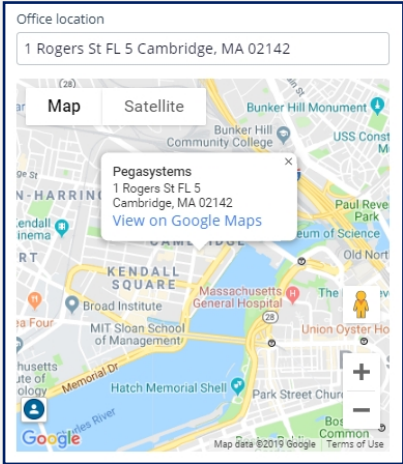
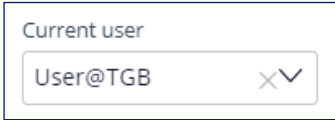
Data Sources

If there are multiple sources, the first IF that evaluates to true is used. If none evaluate to true, the OTHERWISE source is used.

Source*	Data transform name*	System name
1 Source* Data Transform Data Transform Report definition Lookup Activity		☒ Simulate data source System name

DISABLED DATA SOURCE DETAILS
Report Definition • GoGo-GoGoRoad-Data-VehicleModels • DataTableEditorReport

Field type	Type of data
Text (single line)	Any single line of text.
Text (paragraph)	A large text box that accepts multiple lines of text.
Boolean	Allows users to select a check box to indicate one of two possible responses.
Currency	Currency code and value are stored based on the default currency type.
Date and time	UTC (Coordinated Universal Time) value normalized to Greenwich Mean Time (GMT). Date automatically displays in localized format.
Date only	Calendar date with a localized format.
Decimal	Numbers with a fractional component. Use this field type when fractions are needed.
Email	Valid email format with a @ symbol. An email field is an action-oriented control, meaning the value stored in the field displays as a link.
Integer	Positive and negative whole numbers, including the value zero (0).
Phone	Digits display in a localized format. A phone field is an action-oriented control, meaning the value stored in the field displays as a link.
Picklist	A list of predefined values.
Time only	UTC (Coordinated Universal Time) value normalized to Greenwich Mean Time (GMT).
URL	Web address. A URL field is an action-oriented control, meaning the value stored in the field displays as a link.

Field type	Type of data	Example
Attachment	Document or file.	
Location	Address input or automatic geolocation.	
User reference	Enter or select a user ID that exists in the system.	

Data relationship field type	Data source	Use case
Embedded data	User-supplied data such as a name and address sourced from inside a case type.	A company needs to capture shipping addresses.
Query	A data page or view that is not sourced from inside the case type. The data page defines that the Query data relationship is configured to use.	An application needs to update the current weather.
Case reference	Single or multiple records from a selected case type.	A user selects from a list of service cases from the Service Case type.
Data reference	Single or multiple records from a selected data page.	A user selects from a list of products to order.

Data relationships

- .CreditCards is a multiple record data relationship
- It is being used by .Customer which is a single record data relationship
- .Customer
 - .FirstName
 - .LastName
 - .CreditCards()

Customer
First Name
Sandra
Last Name
Washington

▼ **Credit Cards**

[+ Add item](#) [✕ Delete](#)

	Card Number	Expiration Date	Verification Code
1	0000 0000 0000 0000	01/2025	321
2	1111 1111 1111 1111	02/2024	456

Data and integration - Referencing a property

Refer to a property in Pega by prefixing the property name with a “.” (period or dot).

Value mode properties

.OrderDate

- A single value property named OrderDate

.Phone(Mobile)

- An entry in a value group property, such as the mobile phone number where Mobile is the group subscript

.DiscountCode(1)

- The first entry in a value list property, such as one of the discount code

Page mode properties

.Customer

- A page that contains customer information

.Address(Work)

- An entry in a page group property, such as the work address, type

.LineItem(3)

- The third page of a page list that contains purchase request line items, type

Standard property names

There are a set of standard Pega properties. The prefix identifies how the standard property can be used.

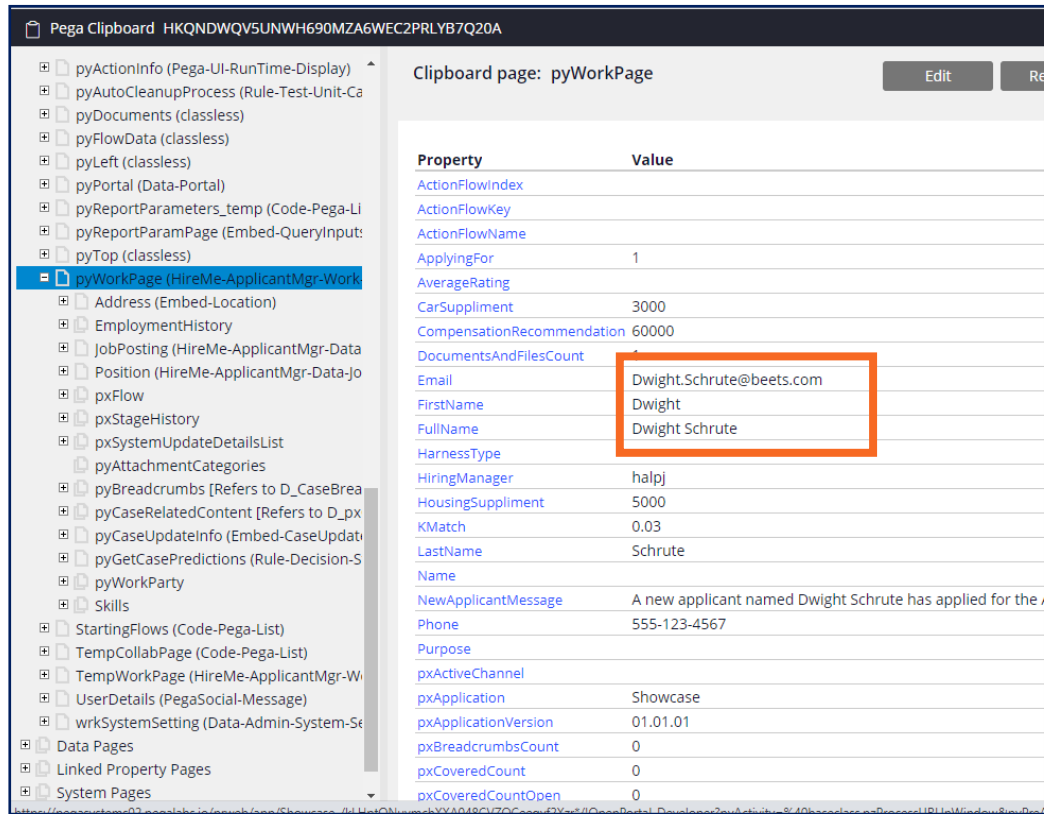
The following are the prefixes for system properties:

- **px** – Visible to the user but can't be directly modified.
- **py** – Users can explicitly enter or change.
- **pz** – Reserved for internal use; users can't see, enter, or modify.

pxUpdateSystemID	pega
pxUrgencyPartyTotal	0
pxUrgencyWork	10
pxUrgencyWorkClass	10
pxUrgencyWorkSLA	
pxUrgencyWorkStageSLA	0
pxUrgencyWorkStepSLA	
pyAgeFromDate	20200708T164935.621 GMT
pyCancelLabel	Cancel
pyConfirmationNote	pyStepRoutedConfirmation
pyCustomerSatisfiedTimestamp	
pyDocumentTitle	
pyElapsedCustomerUnsatisfied	6.0
pyElapsedStatusNew	6.0

Clipboard tool

- A debugging and troubleshooting aid for application developers
- Acts as a temporary memory for both the case and the entire application
- Allows an application developer to examine a snapshot of the data structure and contents and sometimes change values
- Has a collection of pages containing properties
- The clipboard resides on the server



Pega Clipboard HKQNDWQV5UNWH690MZA6WEC2PRLYB7Q20A

Clipboard page: pyWorkPage

Property	Value
ActionFlowIndex	
ActionFlowKey	
ActionFlowName	
ApplyingFor	1
AverageRating	
CarSupplement	3000
CompensationRecommendation	60000
DocumentsAndFilesCount	
Email	Dwight.Schrute@beets.com
FirstName	Dwight
FullName	Dwight Schrute
HarnessType	
HiringManager	halpj
HousingSupplement	5000
KMatch	0.03
LastName	Schrute
Name	
NewApplicantMessage	A new applicant named Dwight Schrute has applied for the
Phone	555-123-4567
Purpose	
pxActiveChannel	
pxApplication	Showcase
pxApplicationVersion	01.01.01
pxBreadcrumbsCount	0
pxCoveredCount	0
pxCoveredCountOpen	0

pyWorkPage

pyWorkPage is a top-level page on the clipboard that stores case data.

Whenever a user is working on a case, the case will ALWAYS, reside in pyWorkPage.

An embedded page is a page that is NOT a top-level page, that typically stores data describing a data type.

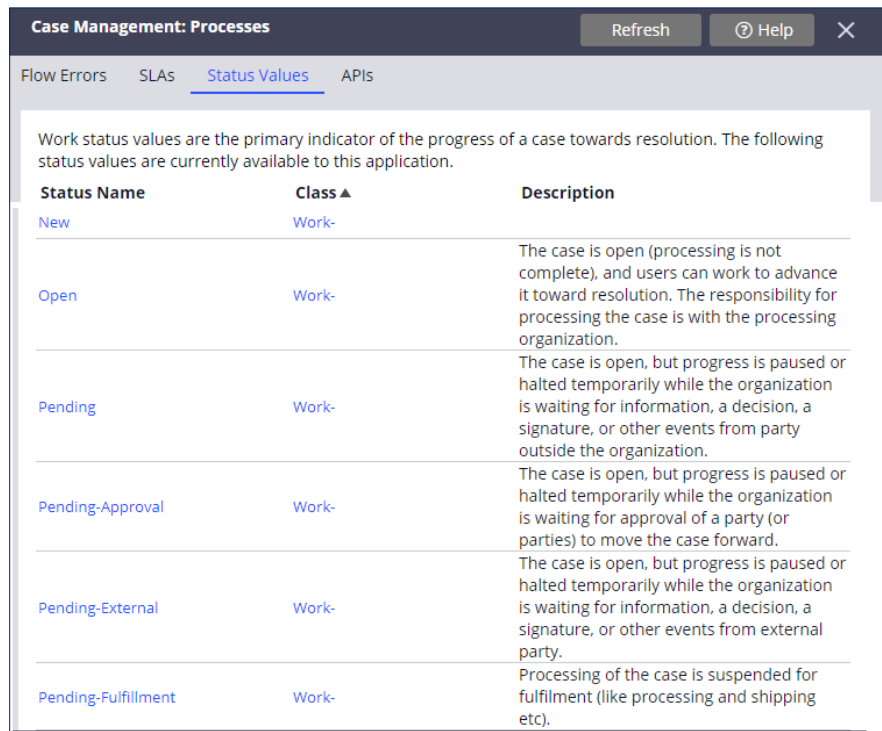
- For example, the .Customer(1) page is an embedded page

The pyWorkCover is a page that contains the case data for a parent case when the associated child case is being processed in pyWorkPage.

Clipboard page: pyWorkPage.Customer(1)	
EditRefreshActions	
Property	Value
CityAndState	Castle Rock, CO
CompanyContact	Janet Libbey
CompanyName	Fisher and Smith
pxObjClass	OKA9NG-ExenseRe-Data-Customer
pyLabel	

Field values

- Field values provide a method for defining allowed values for properties.
- Field values are used if the list of allowed values is large, expected to change frequently, or specific for each case type.
 - For example, case instance status is set using the property `.pyStatusWork`. The list of allowed values for setting `.pyStatusWork` is defined by using Field values.



Case Management: Processes

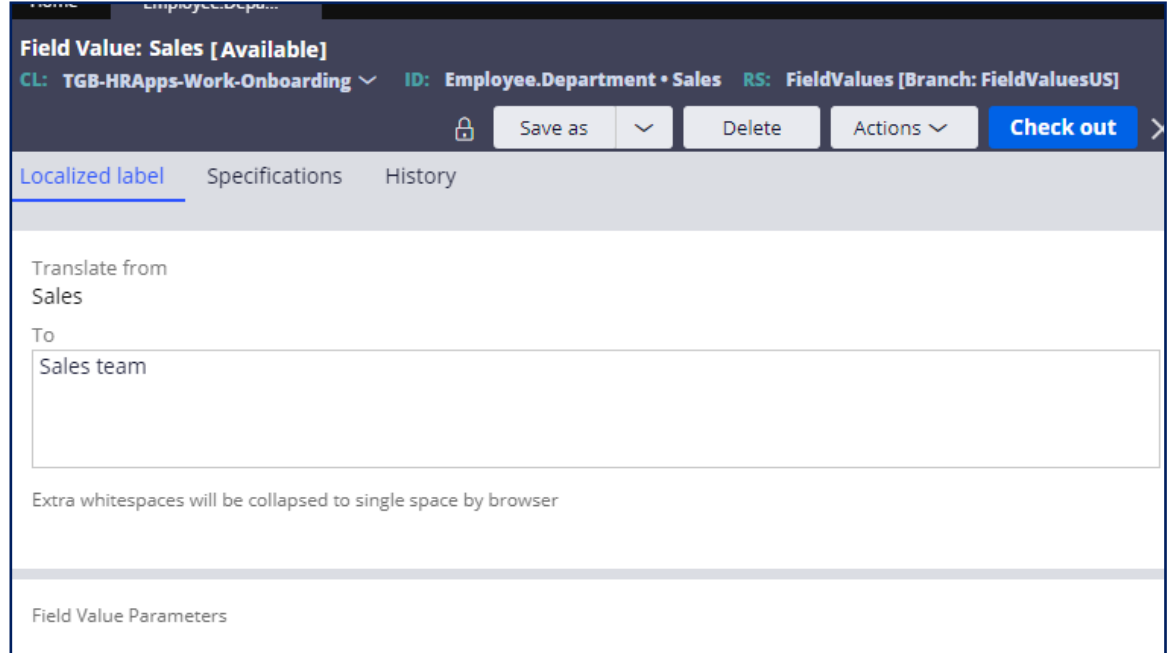
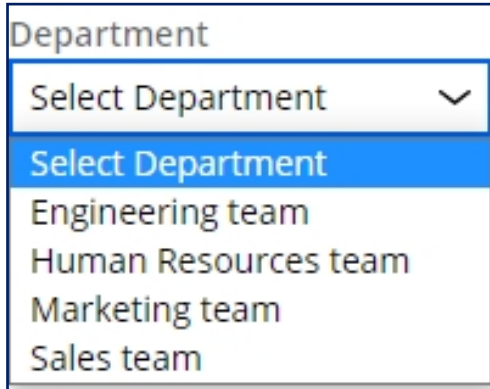
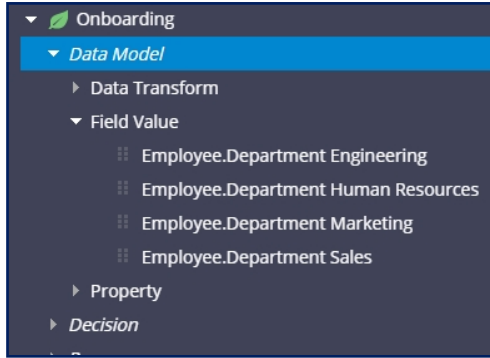
Refresh Help

Flow Errors SLAs Status Values APIs

Work status values are the primary indicator of the progress of a case towards resolution. The following status values are currently available to this application.

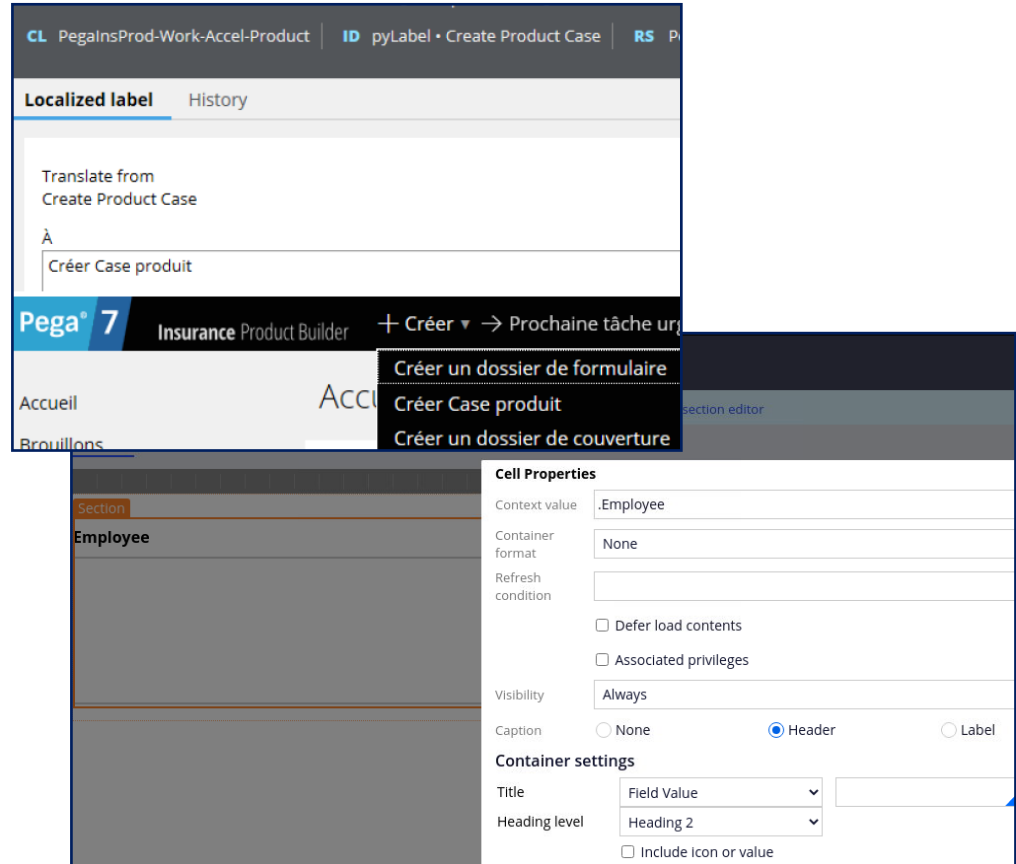
Status Name	Class ▲	Description
New	Work-	
Open	Work-	The case is open (processing is not complete), and users can work to advance it toward resolution. The responsibility for processing the case is with the processing organization.
Pending	Work-	The case is open, but progress is paused or halted temporarily while the organization is waiting for information, a decision, a signature, or other events from party outside the organization.
Pending-Approval	Work-	The case is open, but progress is paused or halted temporarily while the organization is waiting for approval of a party (or parties) to move the case forward.
Pending-External	Work-	The case is open, but progress is paused or halted temporarily while the organization is waiting for information, a decision, a signature, or other events from external party.
Pending-Fulfillment	Work-	Processing of the case is suspended for fulfillment (like processing and shipping etc).

Configuring a field value



Localization

- Localization wizard identifies field values and text strings used in your application ruleset user interface rules.
- For localized text to be displayed in the menu, create field values for .pyLabel property.
- Section header names with field label values can use Field values instead of text.



Configuration sets and settings

You can use Configuration settings in the following ways:

- **Control the use of features in an application** - When a feature has dependencies, you can use Configuration settings to turn features off until the dependencies are met.
- **Determine which process in a flow should be followed** - If approval is needed based on a monetary limit.
- **Control UI experience** - When an agile development methodology is used, process changes are introduced with each release. You can use a Configuration setting to control the display of instructions for a process change in an existing process or for new processes. Once users adopt the process, you can update the Configuration setting to hide the additional instructions.

Configurations landing page

1

Grouping

2

Manage configuration sets

3

Add configuration

4

See what is new

5

Group

The screenshot shows the Pega APP STUDIO interface for the 'U+ Sales Automation' application. The 'Configurations' tab is active, displaying a table of configuration sets and their details. Numbered callouts highlight key features:

- 1**: Configuration name column header.
- 2**: Configuration set: Opportunities (Total 8).
- 3**: Add configuration button.
- 4**: What's new button.
- 5**: Group (1) button.

Configuration name	Description	Type	Value (default)	Configuration set	Update date
Configuration set : Collaboration Total 6					
Configuration set : Insights Total 5					
Configuration set : Integrations Total 2					
Configuration set : Opportunities Total 8					
Allow partner lead opps	Should we allow partners to lead opportunities? Indicate true to enable the partner tools within the application.	Boolean	true	Opportunities	11/24/2020
Partner sourced opportunity	Are partners allowed to source new opportunities? If this value returns true, you will see partner options available on opportunities.	Boolean	CALCULATED	Opportunities	12/8/2020
End of support date	After this date, support will no longer be available for this release and an upgrade to a supported release will be necessary to obtain support.	Date only	12/8/2020	Opportunities	12/8/2020
Target conversion rate	Minimum conversion rate required for full bonus	Decimal	.60	Opportunities	12/8/2020
Minimum expected opportunities	Minimum opportunities expected to be worked per quarter	Integer	5	Opportunities	12/8/2020
Auditing region	Which region should be used for auditing? We provide 3 main regions out of the box which will be used as the sample of opportunities to audit.	Picklist	North America	Opportunities	11/24/2020
Wait time message	Message provided when wait times are longer than normal	Text (single line)	We apologize for the delay. Someone will be with you shortly.	Opportunities	12/8/2020

Referencing configuration settings

- Configuration settings can be accessed in an application through Condition Builder.
- Condition Builder provides a menu to select a configuration set and a configuration setting.

Configuration settings can be added to a Workflow Decision

To use a Configuration setting, in the **When** list, select **Custom condition**, and then click the **Gear** icon.

The screenshot displays the Pega Condition Builder interface. At the top, a navigation bar shows stages: Exploration, Client success, Execution, and Audit. Below this, a sidebar on the left lists actions: Decision (highlighted), Change to a specific stage, and Explore opportunity. The main area shows a 'Configure condition' dialog box. In the 'When' list, 'Custom condition' is selected, and the 'Gear' icon is visible. A dropdown menu is open, showing options: Configurations (selected), Fields, and When conditions. The 'Set conditions' list shows a condition: 'Allow partner lea...' is true. A 'Submit' button is at the bottom right of the dialog.

In the Set Conditions list, select configurations. Then select the desired configuration Set and Setting

Data and integration quiz



Percent of exam

23



Number of questions

14



ClassMarker link

<https://www.classmarker.com/online-test/start/?quiz=3j963bdcd714d671>



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