

## **Brief on configuration Sets:**

### **Def:**

Configuration settings and configuration sets offer low-code mechanisms to govern application behavior effectively. By minimizing the reliance on rule overrides and custom rule implementations, these features contribute to the development of applications that are more maintainable, easier to update, and simpler to deploy. Reducing customizations not only accelerates time-to-market but also mitigates the risk of defects or issues during client delivery.

If a user wants to change the constant value that we use in the production level of an application, he need not go to the production or dev team to update the Constant value that is in DSS or application settings. The Manager can update the user portal.

### **Why PEGA Introduced this rule:**

Rule	Configuration Sets	DSS(Dynamic System Settings)	Application Settings
Update a constant value for Application behavior.	Can update value in the user portal.	Update value and then deploy, involving the Dev team as well for moving the code.	update value and then deploy, involving the Dev team as well for moving the code.

### **Small POC with Configurations for Dev:**

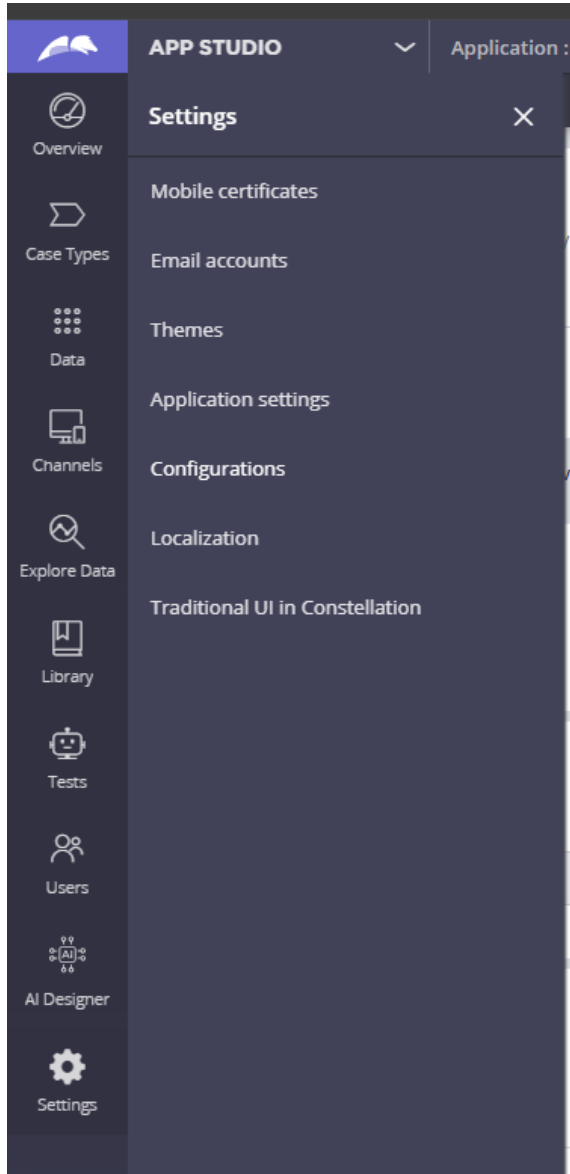
#### Scenario:

I have an Bank Application where it deals with thousands of transactions daily and we need to deal with the many loan applications and wanted to update interest rates according to the national bank. Time to time these rates needs to be updated accordingly. So here the bank is storing the interest rate values in the configuration settings where Case Manager have access to update through the Case Manager Portal.

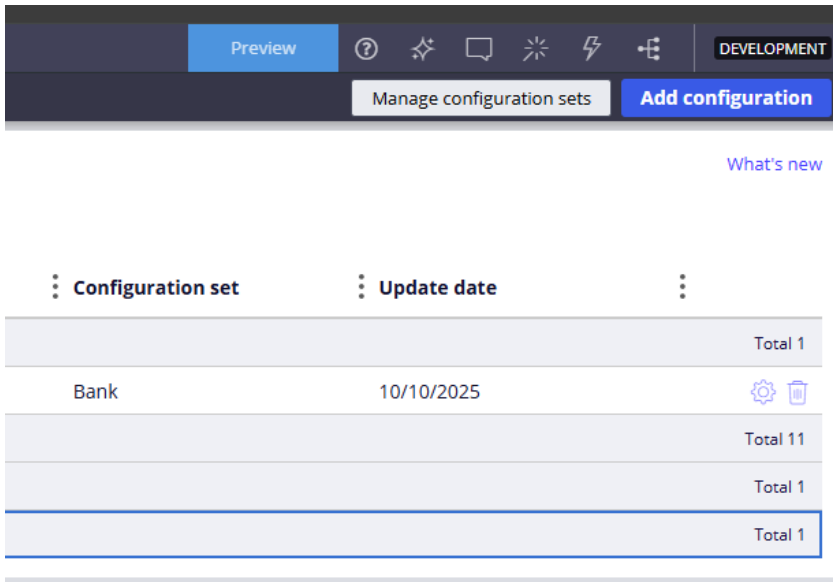
#### Steps to create a new configuration set:

1. First go to the App studio and then go for the

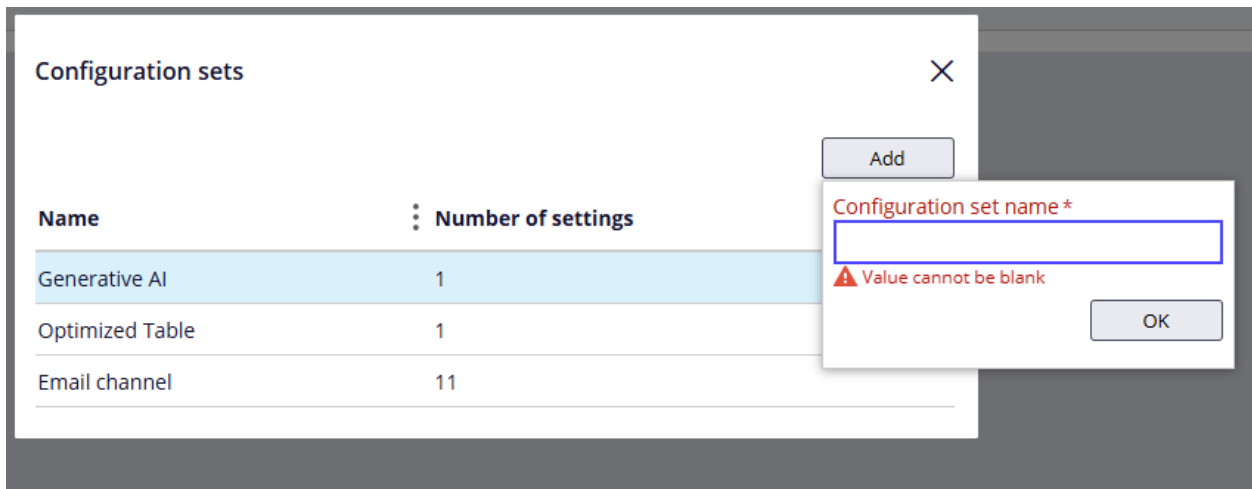
## Settings> Configurations



2. In the configuration on the top Right if you could able to see there is a button called **“Manage Configuration Sets”**



- On click on that we could able to see that we get an option to create a Configurations set where we will be configuring all related configurations at one place.



- Created a Configuration Set named Bank for all bank related values.

Configuration name	Description	Type	Value (default)	Configuration set	Update date
<b>Configuration set: Bank</b> <span>Total 1</span>					
Travel Base fare	This is a Basic fare that needed to be charged while booking a travel package.	Text (single line)	5000	Bank	10/10/2025
<b>Configuration set: Email channel</b> <span>Total 11</span>					
<b>Configuration set: Generative AI</b> <span>Total 1</span>					
<b>Configuration set: Optimized Table</b> <span>Total 1</span>					

- Then same on the top clicking on the “add configuration” we will start adding values to the configuration set.

### Create Configuration

Name \*

Home Loan Interest

Description \*

Interest applied on the All Home Loans.

206 Characters remaining

Configuration set \*

Bank

Configuration scope

Application

Application

Case type

Default value

Constant 12

> Advanced

Cancel Submit

Provide the details where name , Description and Which configuration Set it belongs to in our case it is “Bank”.

- Select to which context this configuration set is applicable for:  
**Application:** It will be applied for the whole application.  
**Case type :** It will be applied to a specific case type only.

7. Please what is the type of attribute that value should be. Ex: Text.

**Create Configuration** [X]

Name \*  
Home Loan Interest

Description \*  
Interest applied on the All Home Loans.  
206 Characters remaining

Configuration set \*  
Bank

Configuration scope  
Case type All

Type  
Text (single line) X

Default value  
Constant 12

> Advanced

Cancel Submit

8. In the default value we will be getting three different options to choose how we can set the default value.

**Create Configuration** [X]

Name \*  
Home Loan Interest

Description \*  
Interest applied on the All Home Loans.  
206 Characters remaining

Configuration set \*  
Bank

Configuration scope  
Case type All

Type  
Text (single line)

Default value  
Constant 12

Constant  
Calculated value from decision table  
Calculated value from decision tree

Cancel Submit

**Constant:** constant value that can be configured now.

**Calculated value from decision table:** dynamic value the can be determined from decision table.

**Calculated value from decision tree:** dynamic value the can be determined from decision tree.

Configurations				
14 results <span>Group (1)</span>				
Configuration name	Description	Type	Value (default)	Configurati
Configuration set: Bank				
Home Loan Interest	Interest applied on the All Home Loans.	Text (single line)	12	Bank
Configuration set: Email channel				
Configuration set: Generative AI				
Configuration set: Optimized Table				

9. Now refer this configuration set in calculation chart in the UI for User information using Expression builder.

Expression builder

Search

Functions

Properties

Configurations

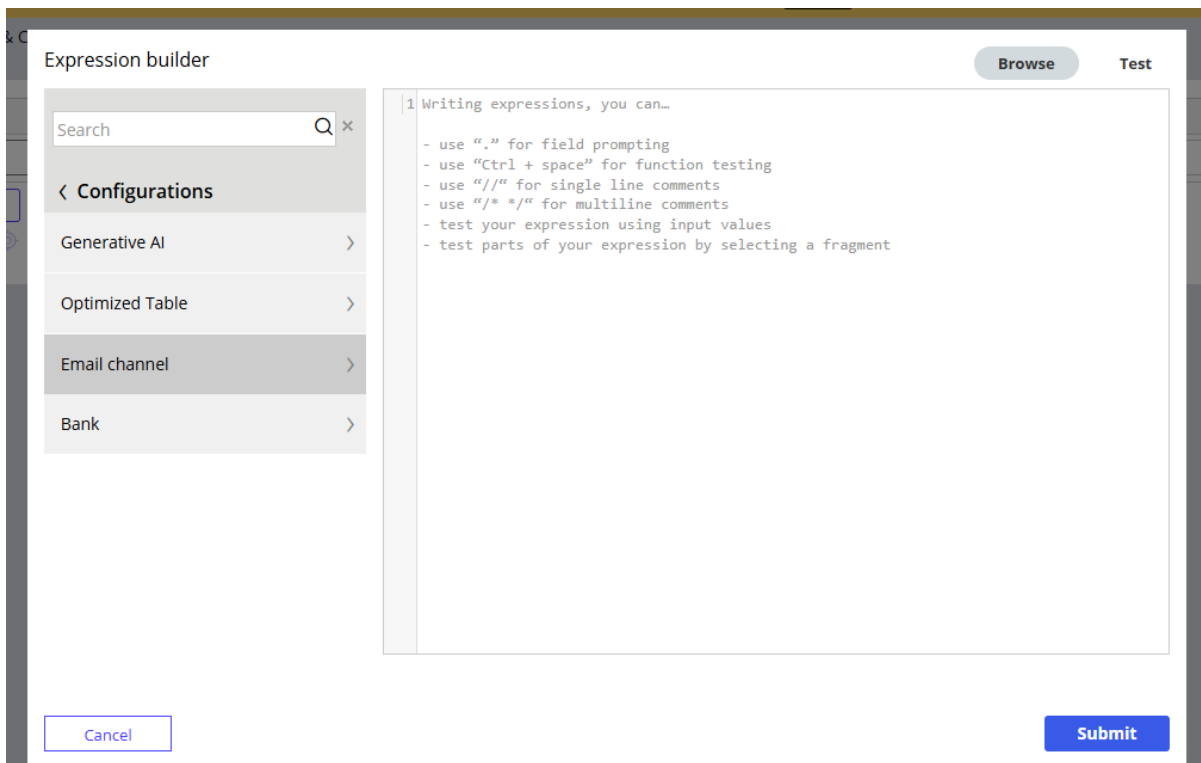
1 Writing expressions, you can...

- use "." for field prompting
- use "Ctrl + space" for function testing
- use "//" for single line comments
- use "/\* \*/" for multiline comments
- test your expression using input values
- test parts of your expression by selecting a fragment

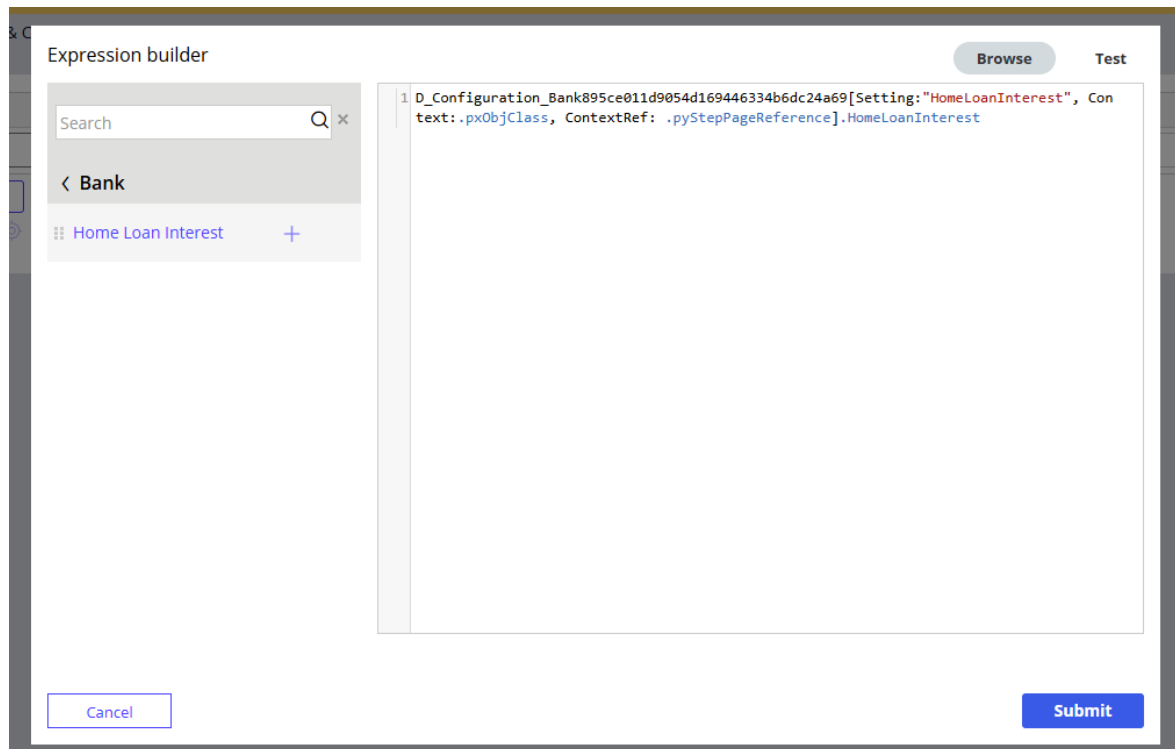
Cancel

Submit

10. In the configuration you can get all the values of configurations.



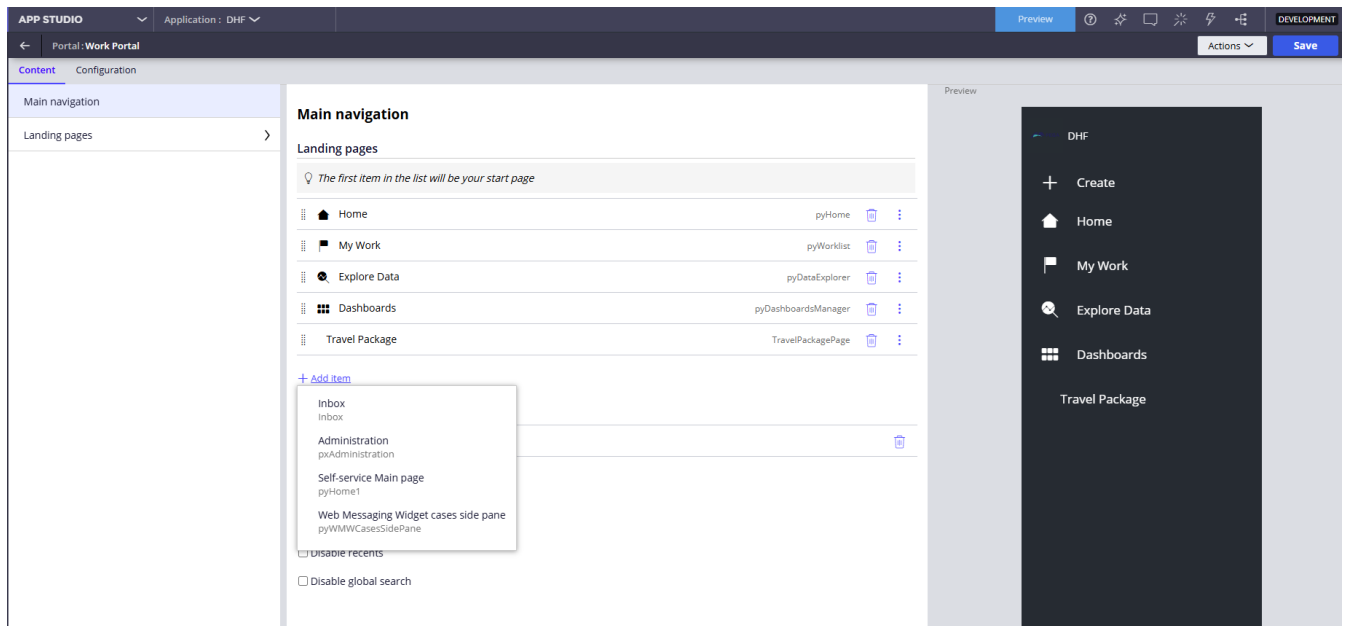
11. Select bank and then select the Home Loan Interest.



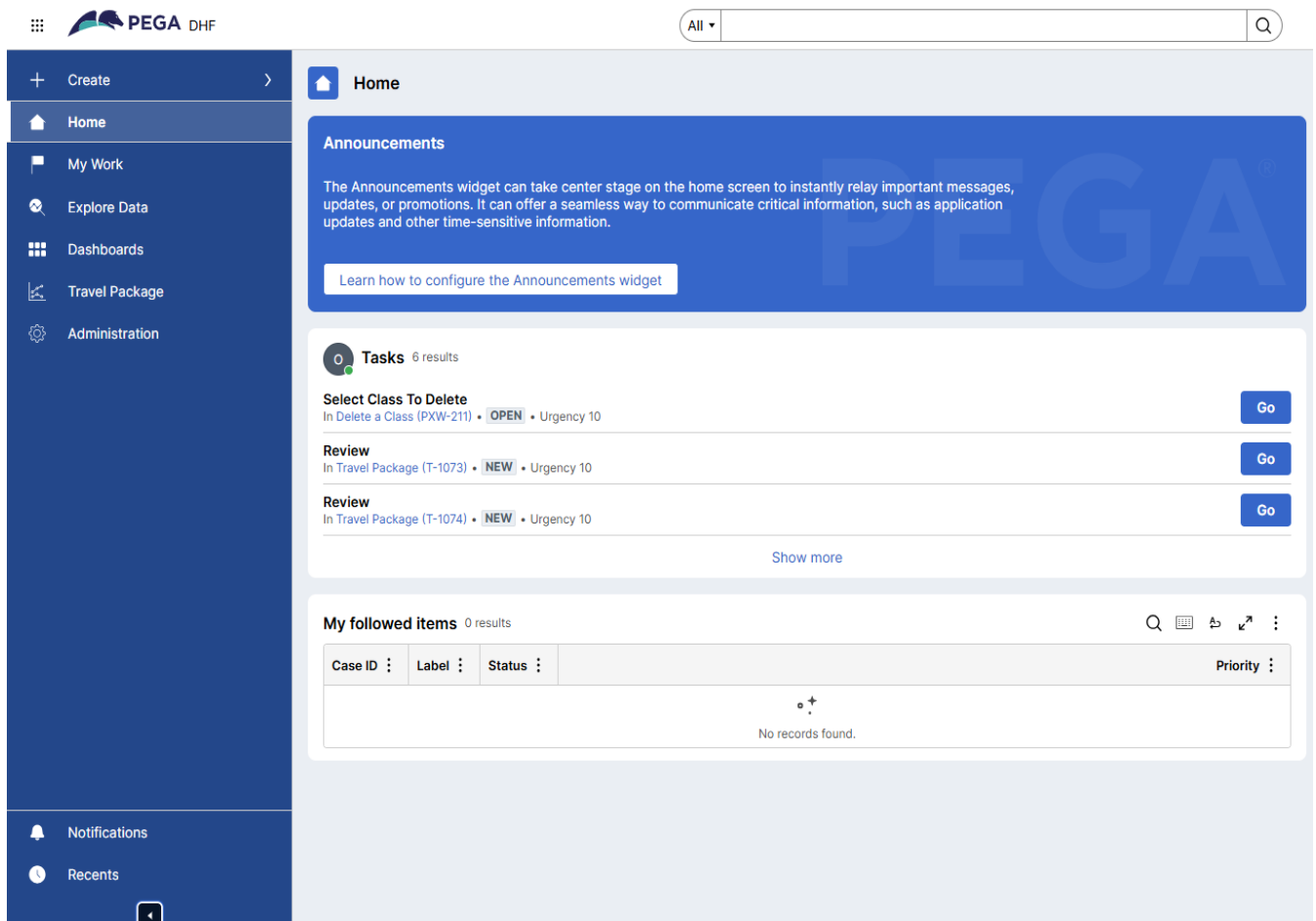
Now by setting the value to a property that we can use it in the Case work flow.  
In this you could able to observe that it is fetching the constant value from data page.

12. To enable access for the manager to edit it from the user portal then then go to the channels and select "user portal" channel. In the navigation add "Adminisration" option so that it could be visible in the user portal.





13. Once you login to the user portal we could able to see that “Administration” option. Click on it.



14. Once you click on that you could able to see all configuration sets.



Here I could able to see Home Loan Interest in the option and I could able to edit anytime. So Case Manager can login and edit this value anytime.

These are the rules that are being created in the process:

MyPOC 01-01-04							Refresh	Export	✕
Rule type	Rule name	Applies to	Available	Updated by	Last updated	Circumstance			
Data Page	D_ConfigsDisplayPage_Bank895ce011d9054d1694...	Pega-Configuration-Bank895ce011d9054d169446...	Final	Opr	2 hours 6 mins ago				
Data Page	D_Configuration_Bank895ce011d9054d16944633...	Pega-Configuration-Bank895ce011d9054d169446...	Final	Opr	2 hours 6 mins ago				
Localization	label pyFieldLabels	@baseclass	Yes	Opr	20 minutes ago				
Portal	WebPortal	Data-Portal	Yes	Opr	1 hour 42 mins ago				
Property	HomeLoanInrest	DHFC-DHF-Work-TravelPackage	Yes	Opr	20 minutes ago				
Property	HomeLoanInterest	Pega-Configuration-Bank895ce011d9054d169446...	Final	Opr	34 minutes ago				
Report definition	DataTableEditorReport	DHFC-DHF-Work-TravelPackage	Yes	Opr	20 minutes ago				
View	ConfigurationSetWrapper	Pega-Configuration-Bank895ce011d9054d169446...	Yes	Opr	2 hours 6 mins ago				
View	DefaultSettingsView	Pega-Configuration-Bank895ce011d9054d169446...	Yes	Opr	34 minutes ago				
View	ReviewDescribe	DHFC-DHF-Work-TravelPackage	Yes	Opr	20 minutes ago				

The above Data Pages and property are under “**Pega-Configuration**” where it has rules for the configuration settings.

And the data is under the class called “**Data-Configuration-Setting**”

2 Applications							Home	Travel Package	pyDefault	DHF 01.01.01	MyPOC	MyPOC 01-01-04	Configuration...
Classes							Instances of Configuration setting runtime values						
Data-Configuration-Setting							Setting*	Set*	Context**	Application*	Name		
Data Model							HomeLoanInterest	Pega-Configuration-Bank895ce011d9054d169446334b6dc24a69	Default	DHF	HOMELOANINTERE		
SysAdmin							ConfirmationEmail	Pega-Configuration-Email46bbafe7c8c54f86901f1f99855dd941	Default	AISConst	CONFIRMATIONEM		
Technical							CurrencyList	Pega-Configuration-Test6fd73dcf243c4a858a4aa0e23cdfb0d7	Default	Lego	CURRENCYLISTPEG		
User Interface							CurrencyType	Pega-Configuration-Test6fd73dcf243c4a858a4aa0e23cdfb0d7	Default	Lego	CURRENCYTYPEPE		
							AISEmail	Pega-Configuration-Email46bbafe7c8c54f86901f1f99855dd941	Default	AISConst	AISEMAILPEGA-COI		
							Pega Azure Image Generation Deployment ID	Pega-Configuration-Gene765400565ba74f8abd7e5cfcae20a96d	Default	AISConst	PYPEGAAZUREIMAC		
							Enable this toggle to view the email UI on the service case in Email Manager portal in Constellation UI.	Pega-Configuration-Email46bbafe7c8c54f86901f1f99855dd941	Default	PegaRULES	PYSHOWEMAILPER		
							DefaultKnowledgeBuddy	Pega-Configuration-Knows5da26e8d82074c0c9a3e10ca4e5dfe5b	Default	PRISM	DEFAULTKNOWLED		
							DefaultKnowledgeBuddyForSemanticSearch	Pega-Configuration-Knows5da26e8d82074c0c9a3e10ca4e5dfe5b	Default	PRISM	DEFAULTKNOWLED		
							DefaultKnowledgeBuddyForSemanticSearch	Pega-Configuration-Knows852b778a2a6467fa2809e275291232a	Default	PRISM	DEFAULTKNOWLED		

To move the instances to other environments we need to check that “**Include Associated Data**” in the product rule at application.

Applications and Components to include									
	Name	Version		Include associated data	Custom/ Production rulesets	Delta mode	Include rule history	Include data types	Update dependent applications
1	HRApps	01.01.01		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	HRFW	01.01.01		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
+									