PEGA PLATFORM

Pega Enablement

Business Architect Essentials

SKILL

BUILD FOR CHANGE

8.7 GA

Exercise Guide

PEGA

The Classroom Experience

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Pega Infinity Overview

Run Job Applicant as Manager

Scenario

You are a new employee of U+, a major company in the financial industry that wants to improve engagement with customers. U+ has recently released an application to handle new Job Applicants to the company. The objective of this new application is to reduce paperwork and provide a much more collaborative system for Human Resources (HR) and the other departments which need to hire staff.

You are a new employee that is not familiar with the Pega Platform or this new application. Therefore, part of your onboarding is to (a) learn about the Pega Platform and (b) see an example of how the technology is used.

You will do so by running and investigating the new application.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Ryan Howard – Citizen Developer	Howar	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Start a new Job Applicant case

As a Case Manager operator, collect the resume, confirm it is not a duplicate application, handle the review routed to the HR department, assess the applicant's suitability, complete the interview through a subcase, review the email confirmation, approve the application, complete compensation and offer acceptance.

> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

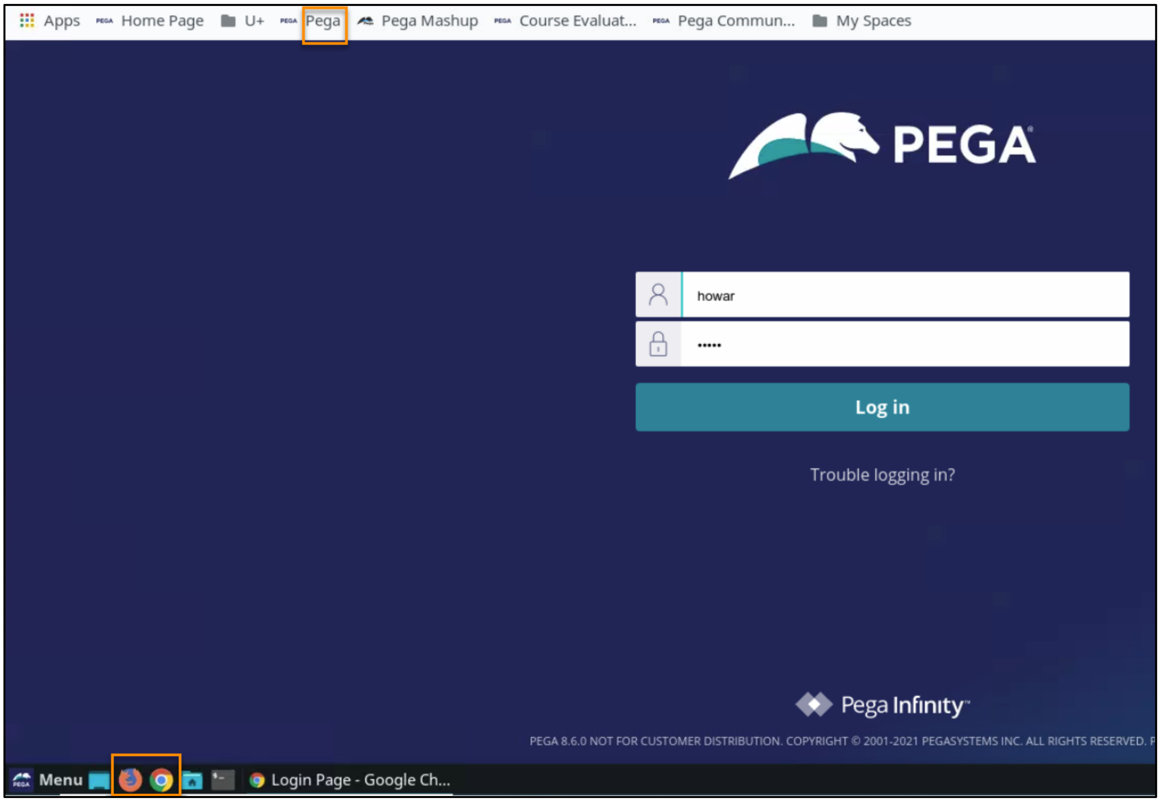
Detailed Steps

Task 1: Start a new Job Applicant case

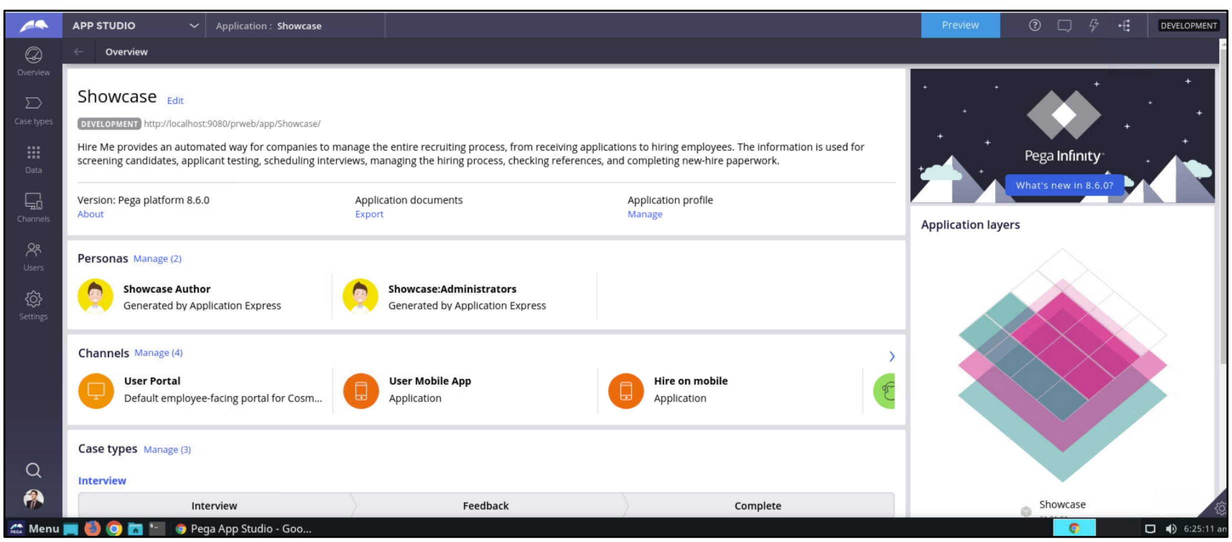
As a Case Manager operator start a new Job Applicant case.

> **NOTE:** Chrome and Firefox are available in the classroom virtual lab environment. The default Pega login screen is also available as a shortcut.

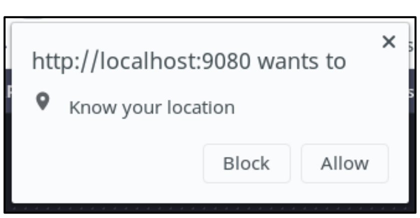
1. Open a browser and the Pega login screen will appear.



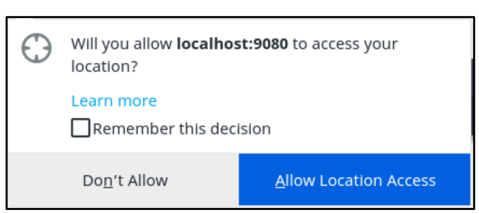
2. Log in and use the credentials **howar** and **rules**. The following appears:



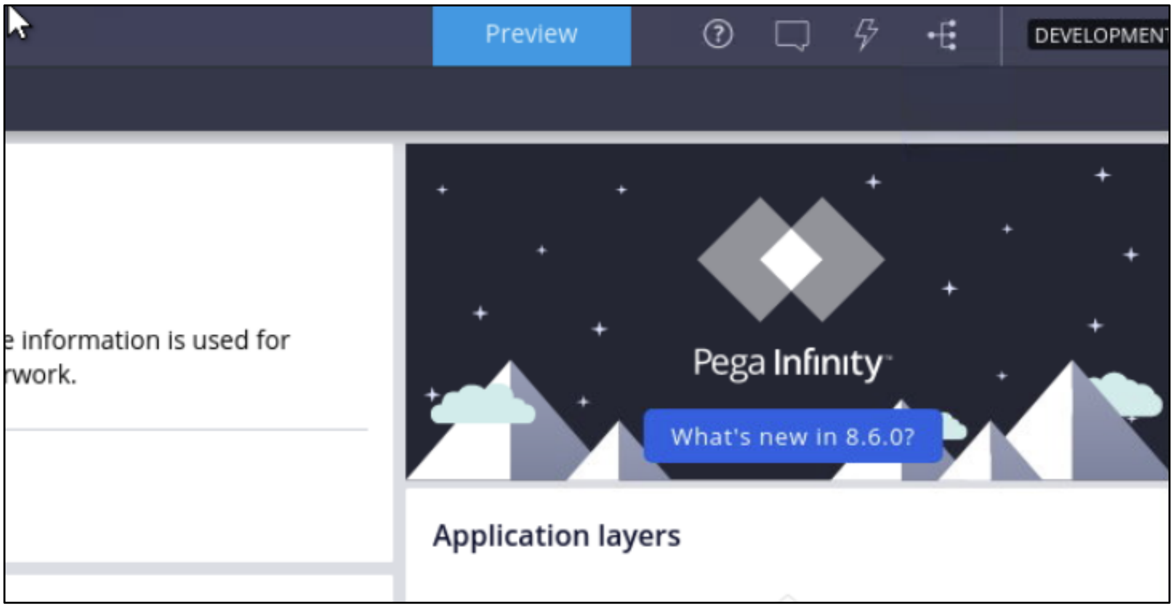
3. Chrome or Firefox may want to track your location. When the location access dialog appears for Chrome, click **Allow**. For Firefox, click **Allow Location Access**.



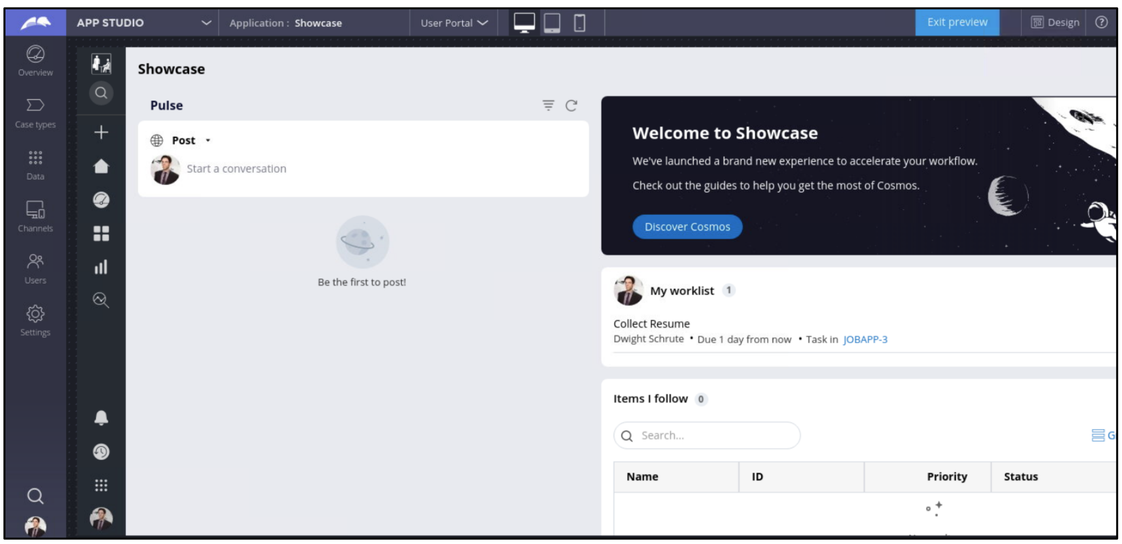
or



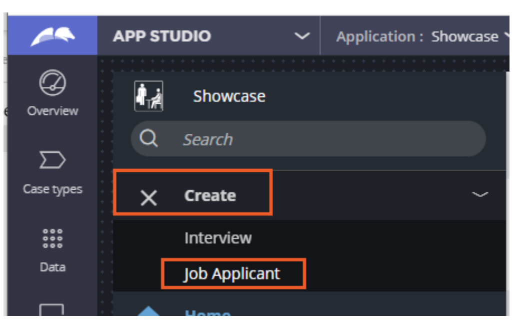
4. Click the **Preview** application button on the title bar.



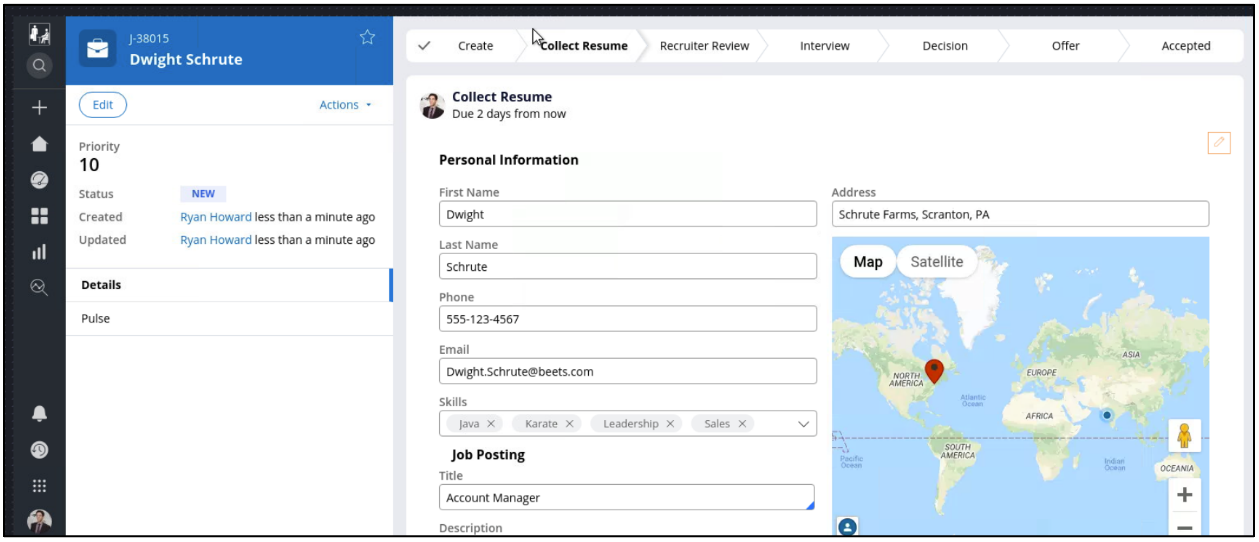
5. The following appears:



6. In the left pane, click **+Create > Job Applicant**.

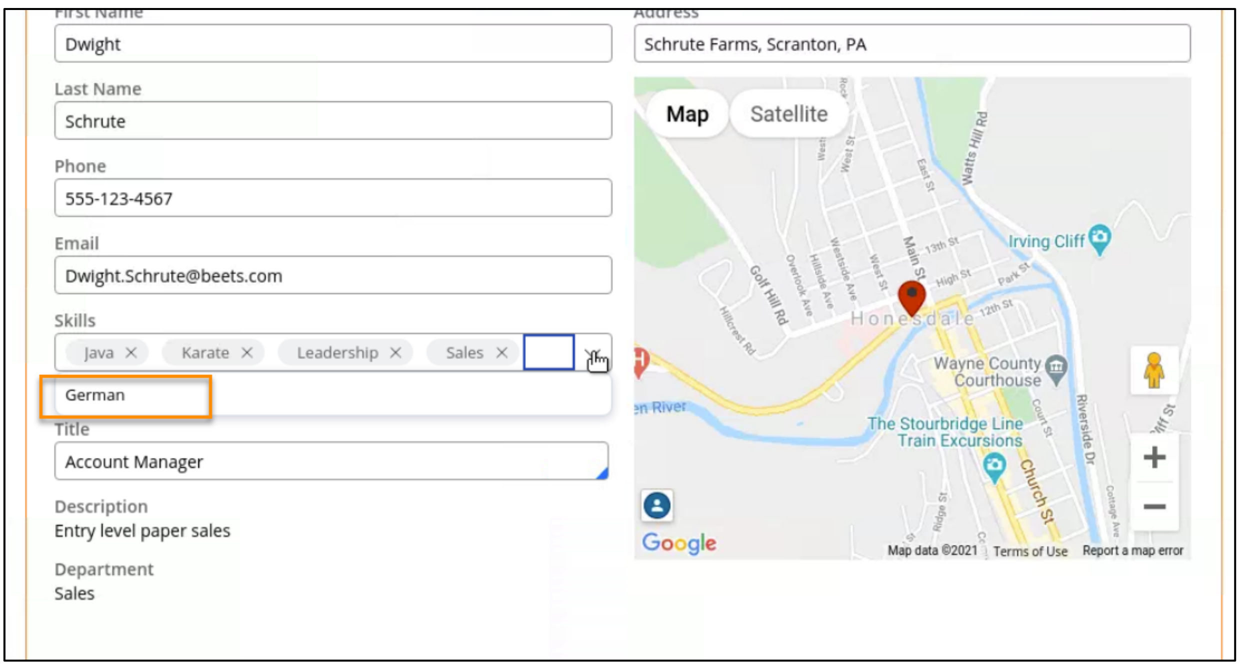


7. The **Collect Resume** form appears.

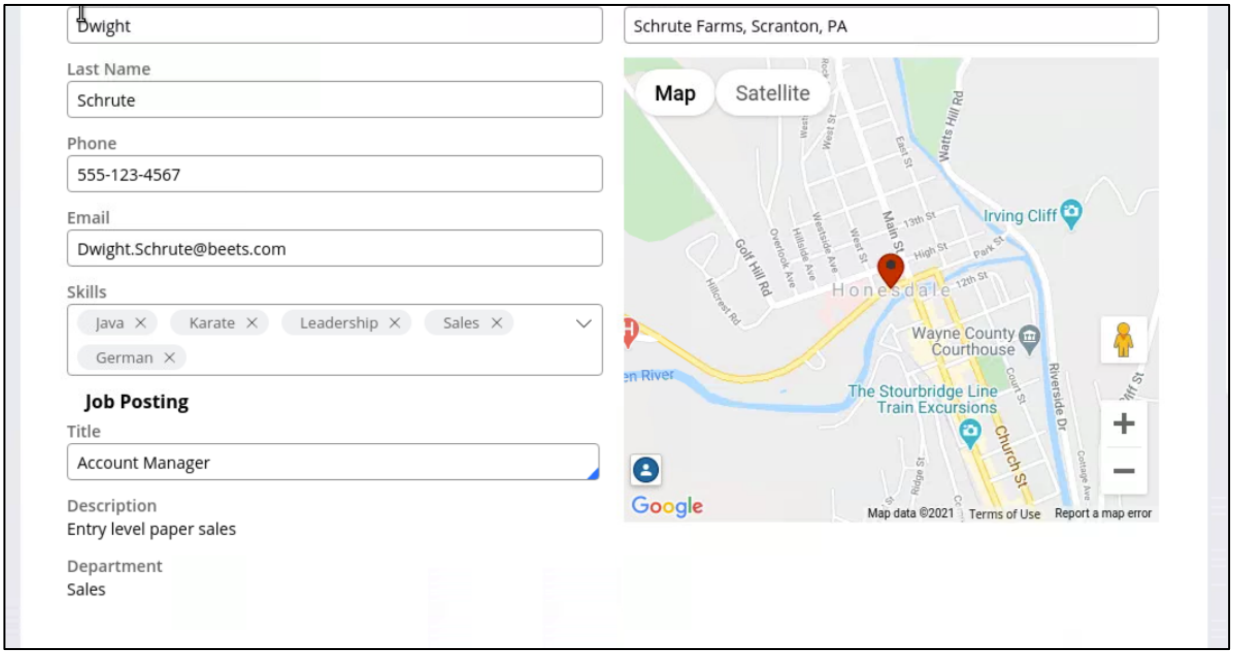


NOTE: The fields are pre-populated, but in a typical application the user will enter appropriate values on the form.

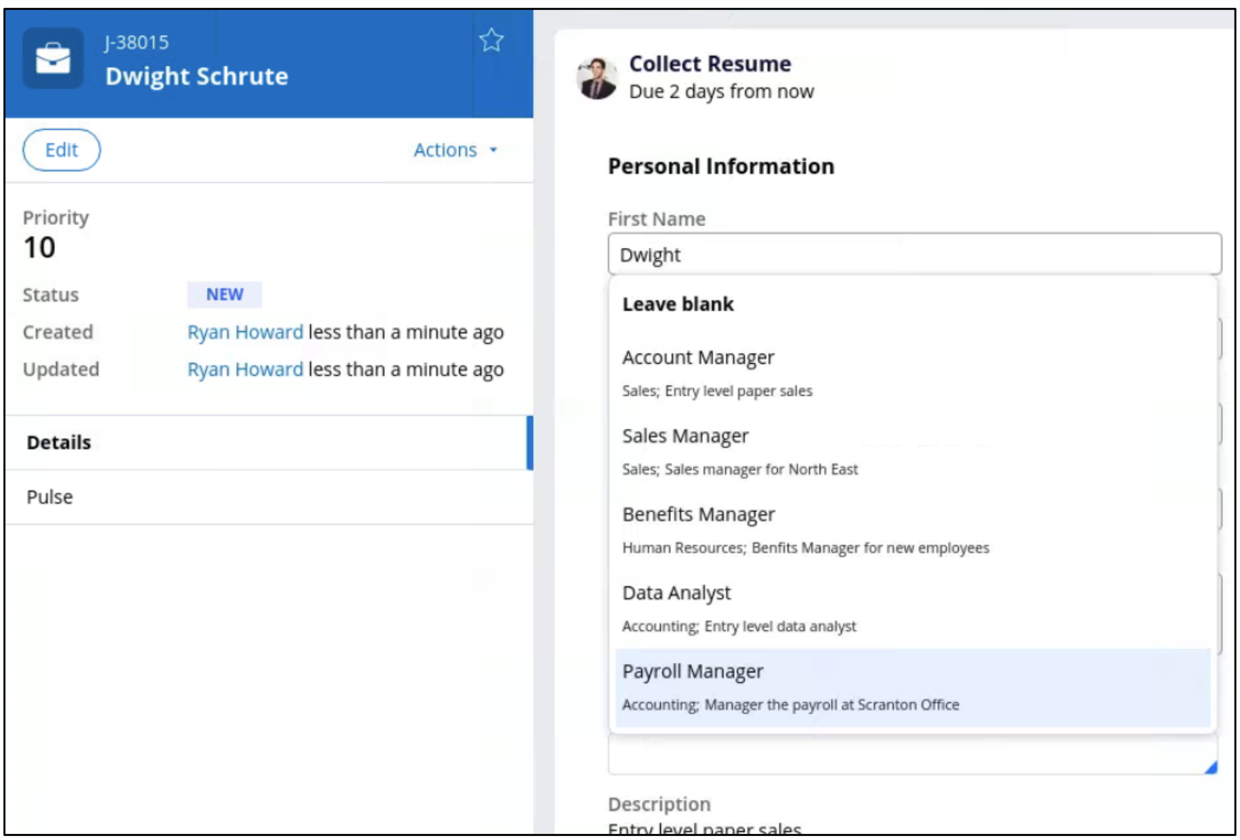
8. Click the **Skills** dropdown.



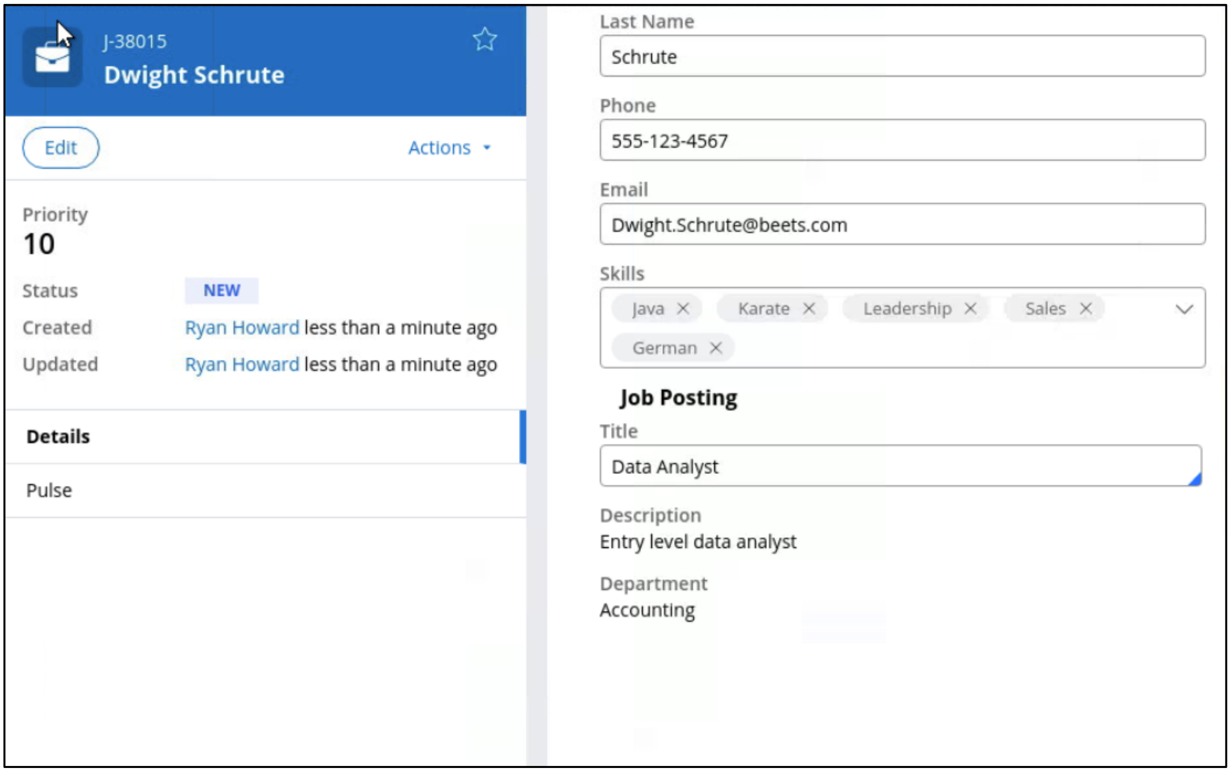
9. Choose **German** to add to the **Skills**.



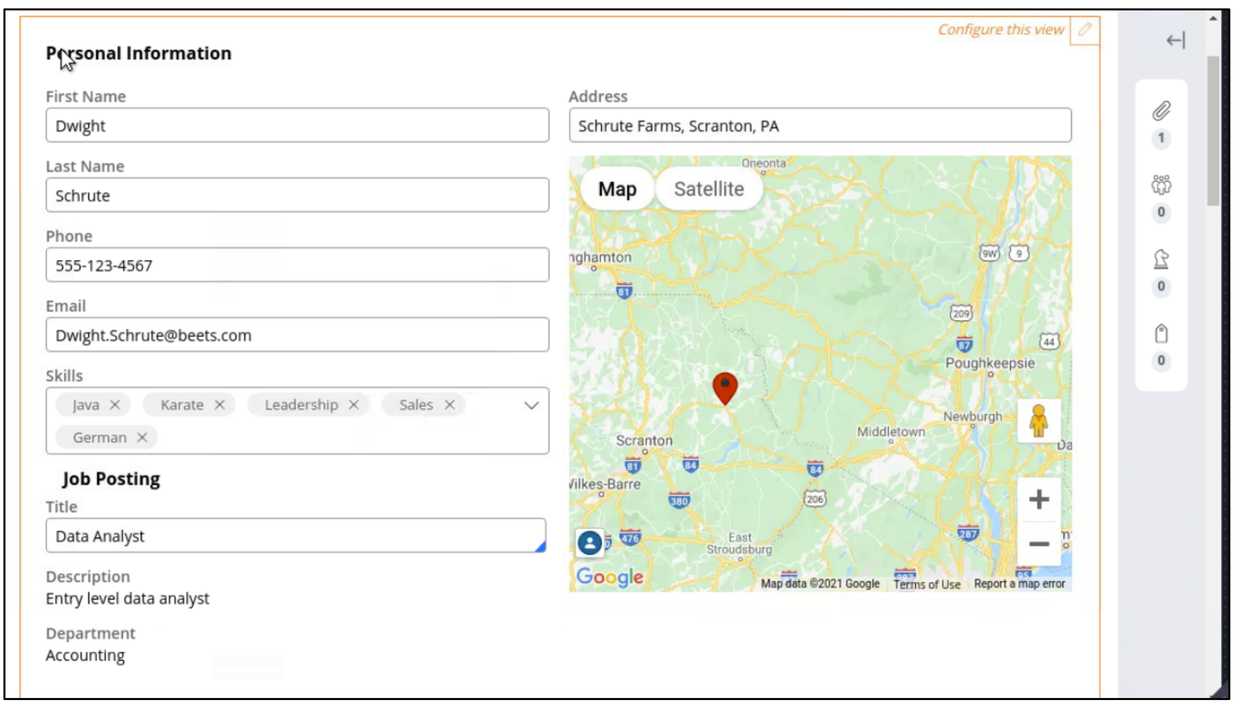
10. Delete **Account Manager** in the **Title** field to show a list of possible values.



11. Select **Data Analyst** and notice that the **Description** and **Department** change.



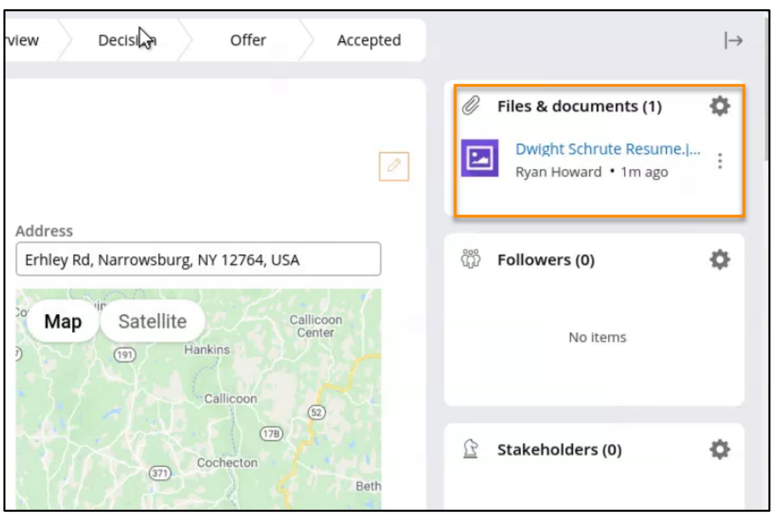
12. From the **Map**, click **+** and **–** to zoom in and zoom out.



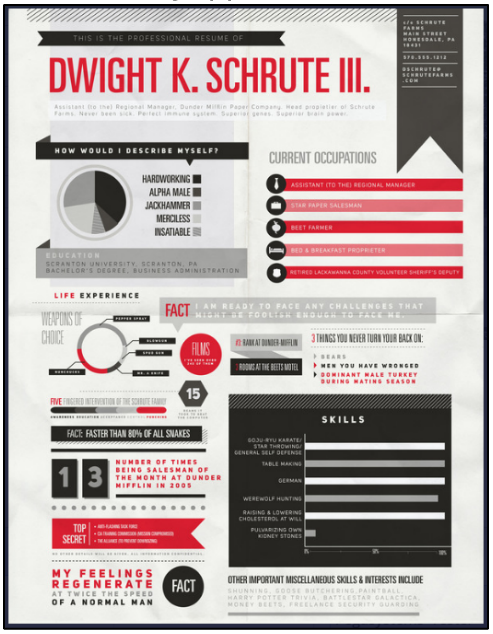
13. Drag the person icon onto an area of the map to show a street view.

NOTE: The area you select on the map may be different from that shown in the screenshot.

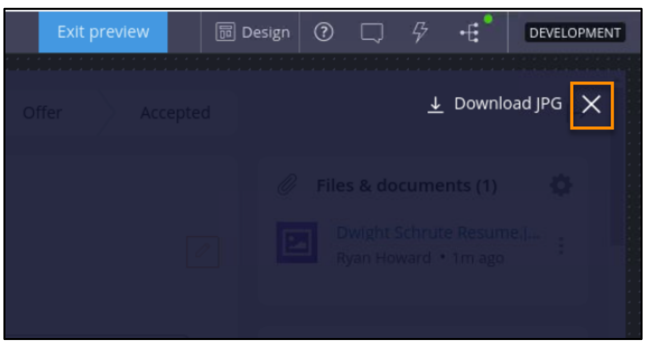
14. Under **Files & documents (1)** in the right panel, click **Dwight Schrute Resume** to open the resume attached.



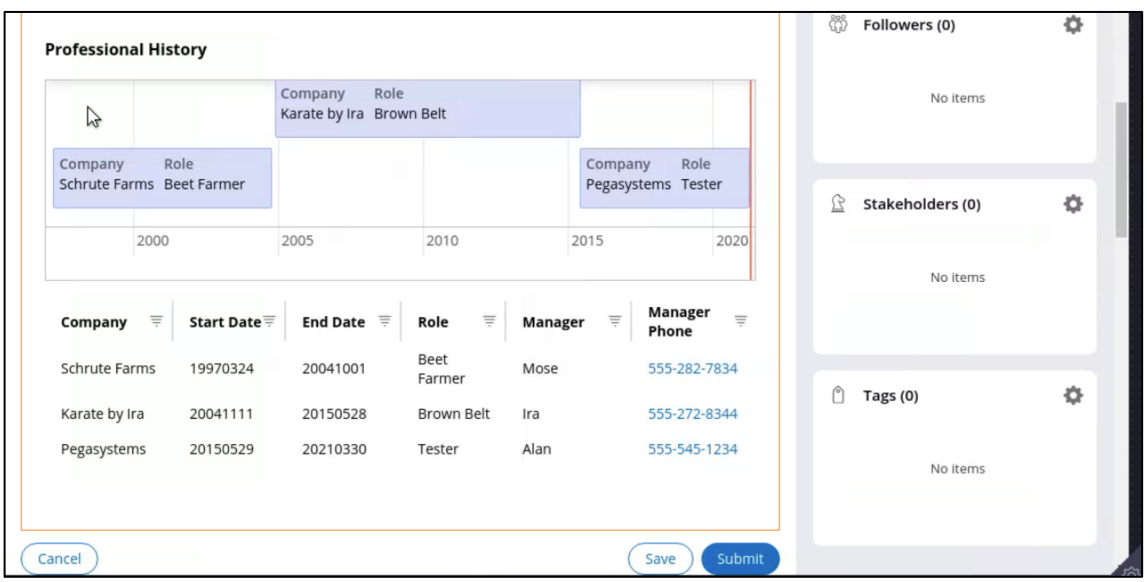
The following appears:



15. In the top right, click the **X** to close the resume view.



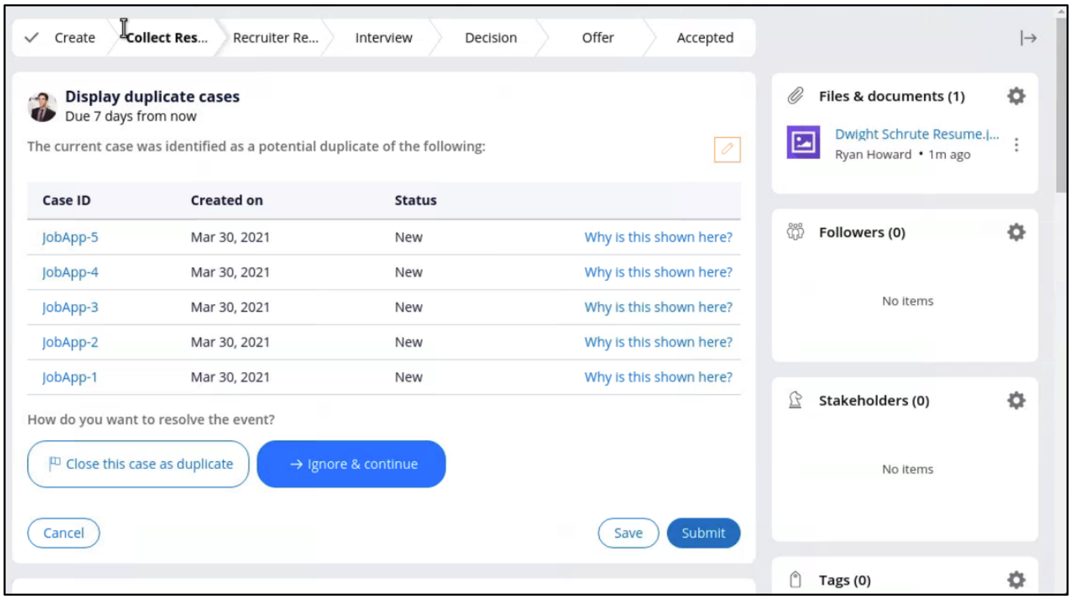
16. Scroll to the bottom of the view and note details of **Professional History** is displayed.



17. Click **Submit** to move to the next step.

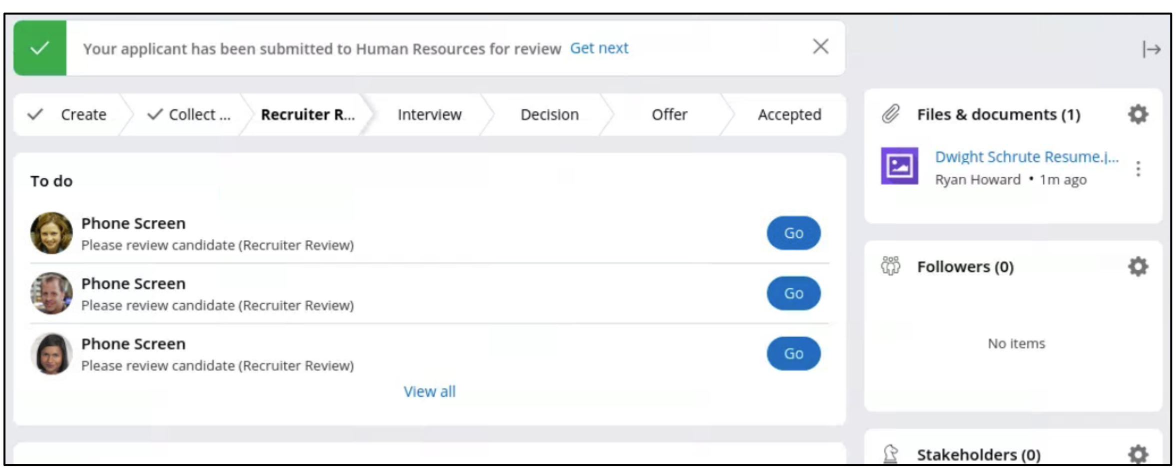
> **IMPORTANT:** If this is the first time you are running the Job Applicant case type with Dwight Schrute as the applicant, there will be no duplicates and you will not see the Display Duplicate Cases screen. Continue to the next step.

18. The next step handles duplicates. Select **Ignore & continue** and click the **Submit button**.

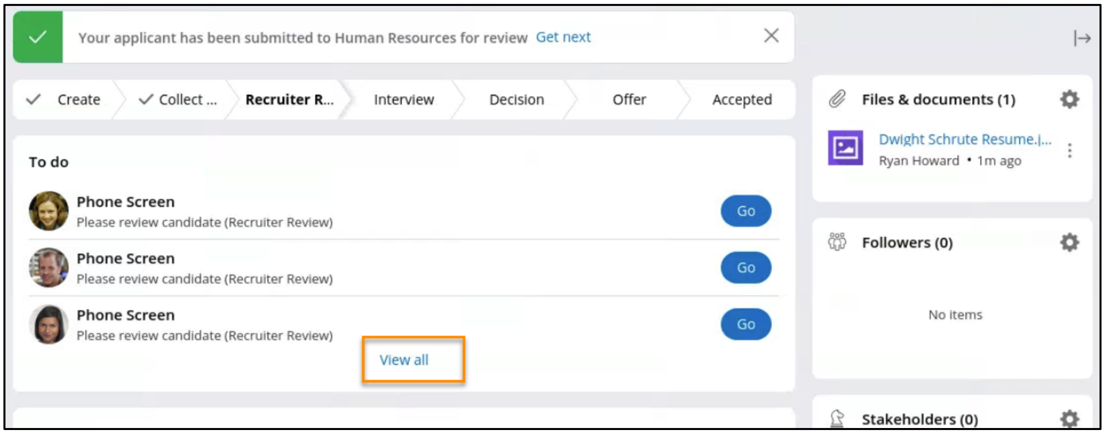


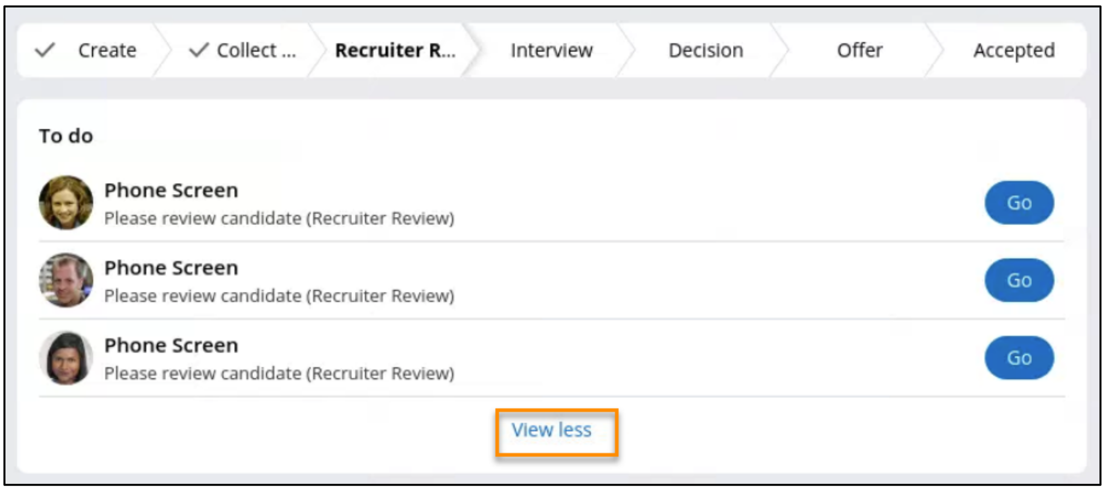
> **NOTE:** The information displayed on your screen may be different from that shown in the screenshot above.

19. The following is displayed. Here we see review tasks that have been routed to members of the HR department.

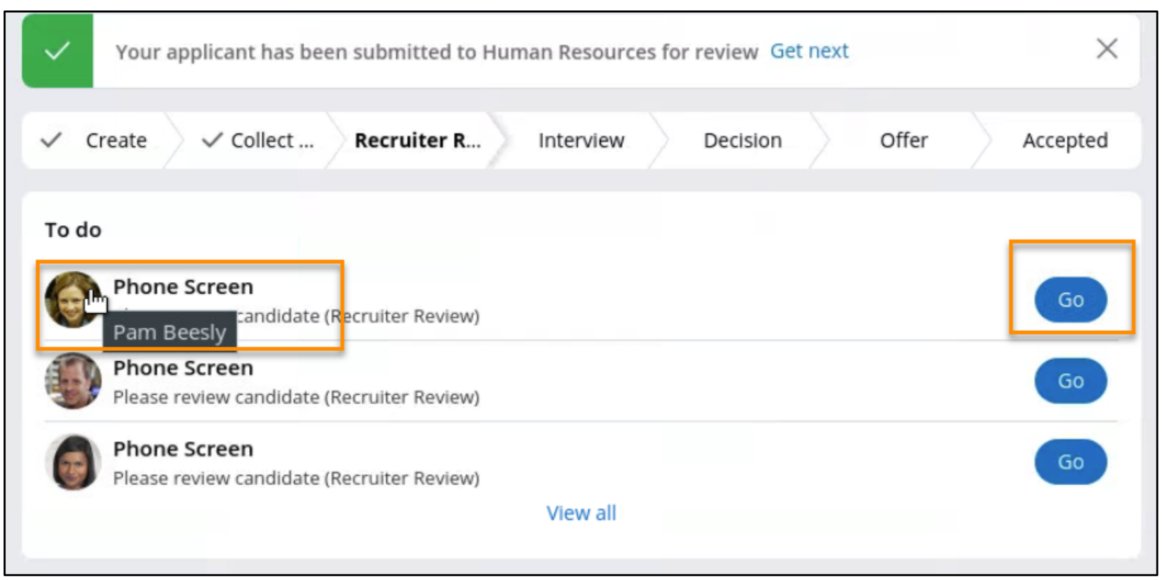


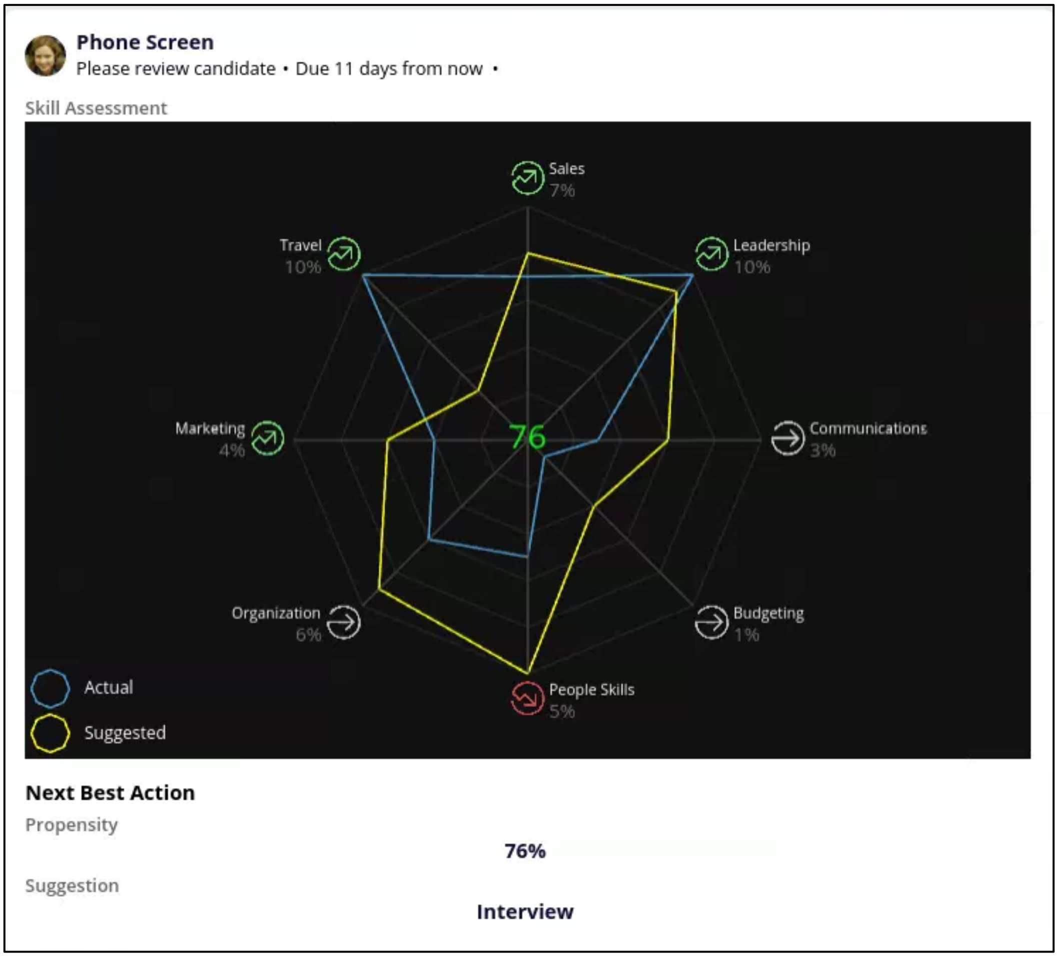
20. Click on the **View all** link to see all the assignments. Here we see all the tasks including completed ones.



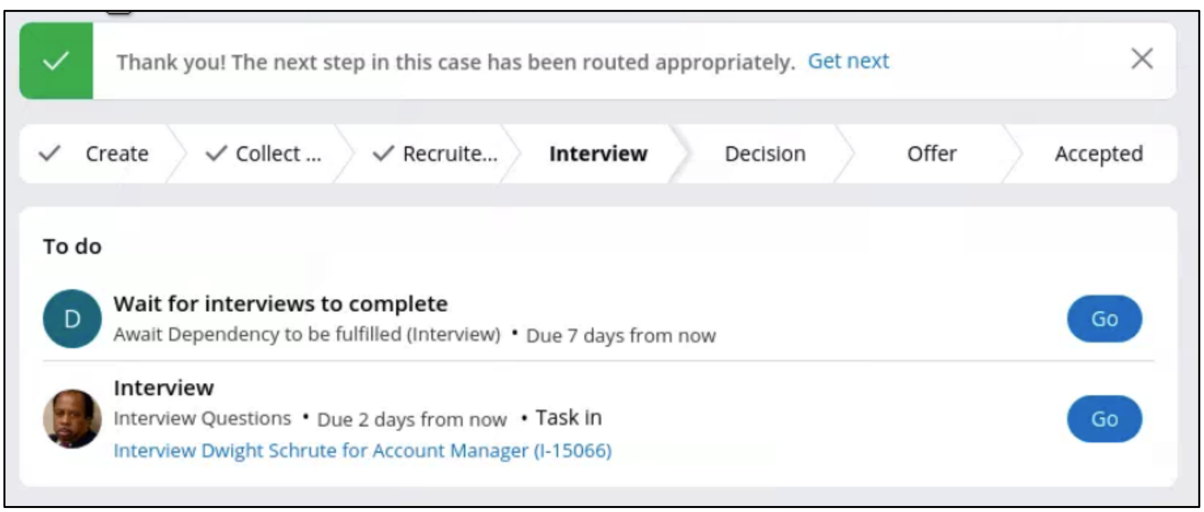


21. Click on the **Go** to the right of Pam Beasley. The following phone screen window appears:





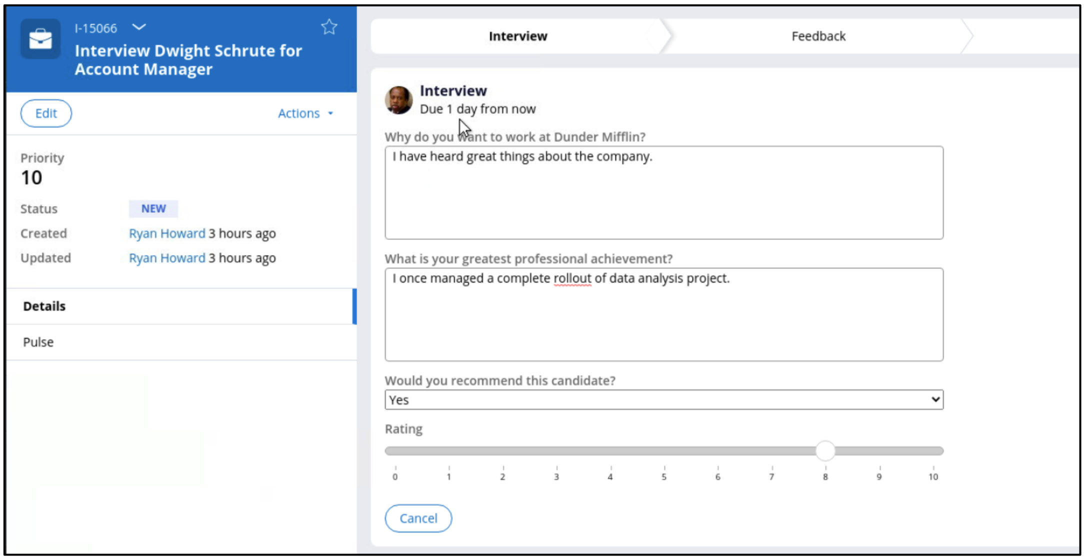
22. Click **Submit** to agree to an interview. The following appears:



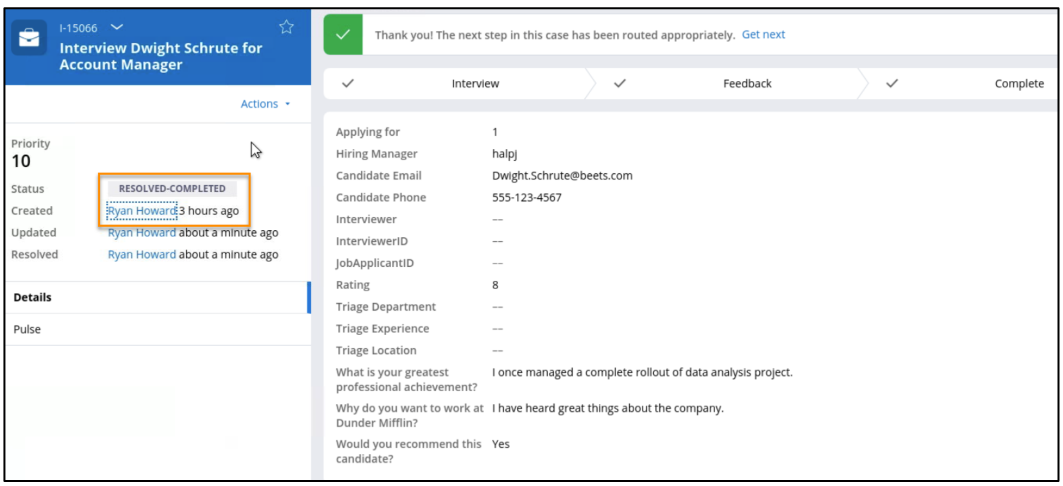
23. Click **Go** to the right of Stanley Hudson to start the interview.

   a. Enter the text of your choice into the text areas for questions, "**Why do you want to work at Dunder Mifflin?"** and "**What is your greatest professional achievement?**"

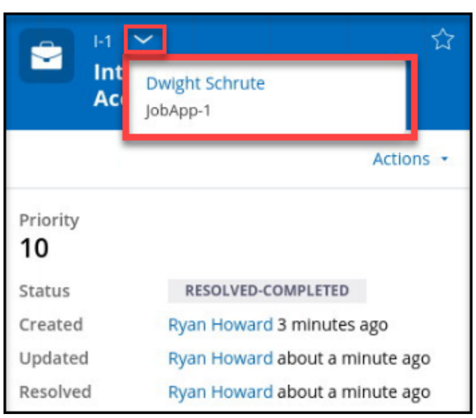
b. For **"Would you recommend this candidate?",** select **Yes** and move the slider for **Rating** to **8**. The following appears:



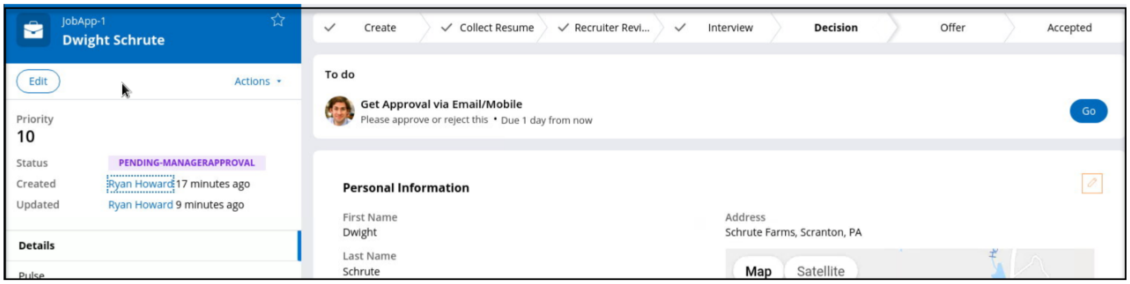
24. Click **Submit**. The **Interview** subcase should now be resolved.



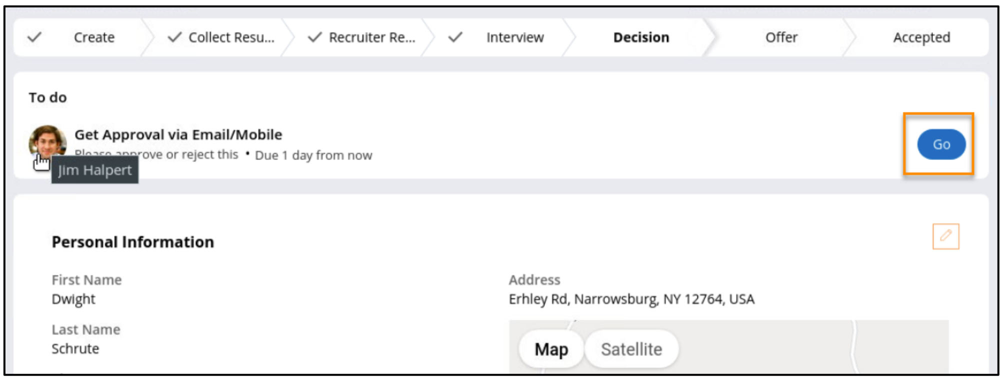
25. Click the link **Dwight Schrute (JobApp- ...)** seen in blue.



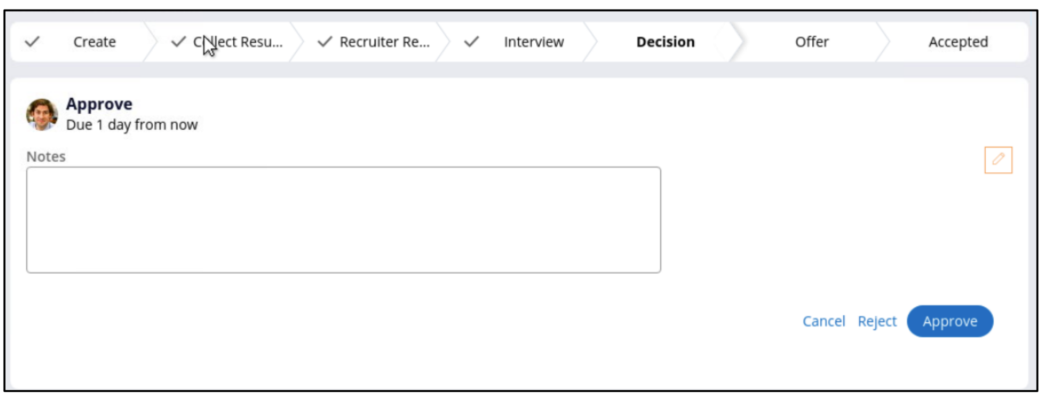
26. Below is an image showing that you have returned to the parent case.



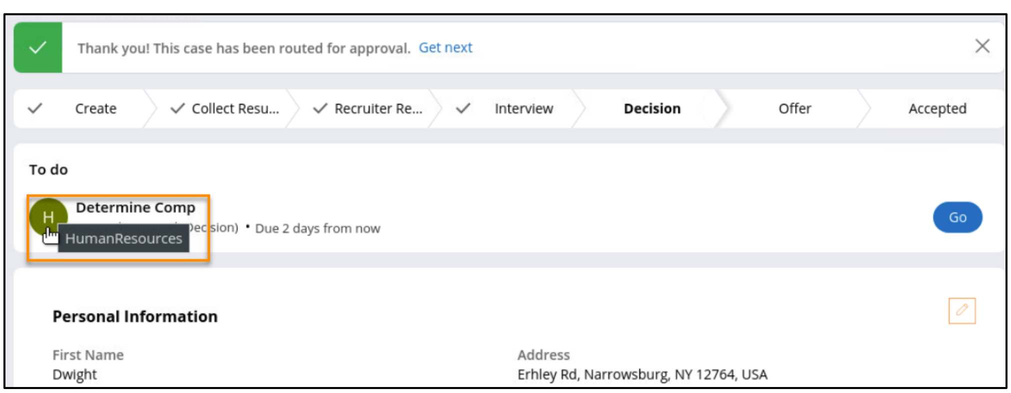
27. Click **Go** to the right of **Jim Halpert** to start the approval.



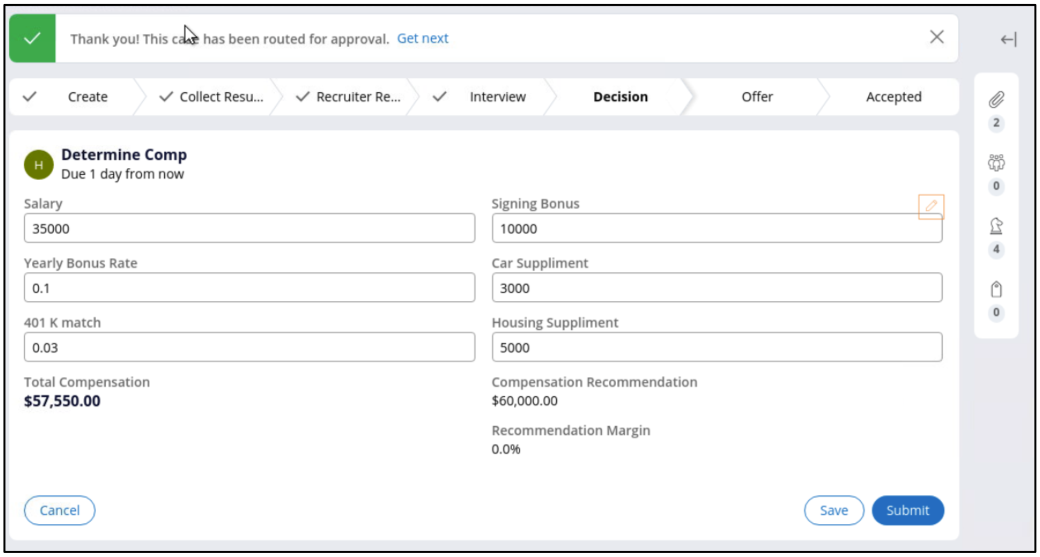
28. Click **Approve**.



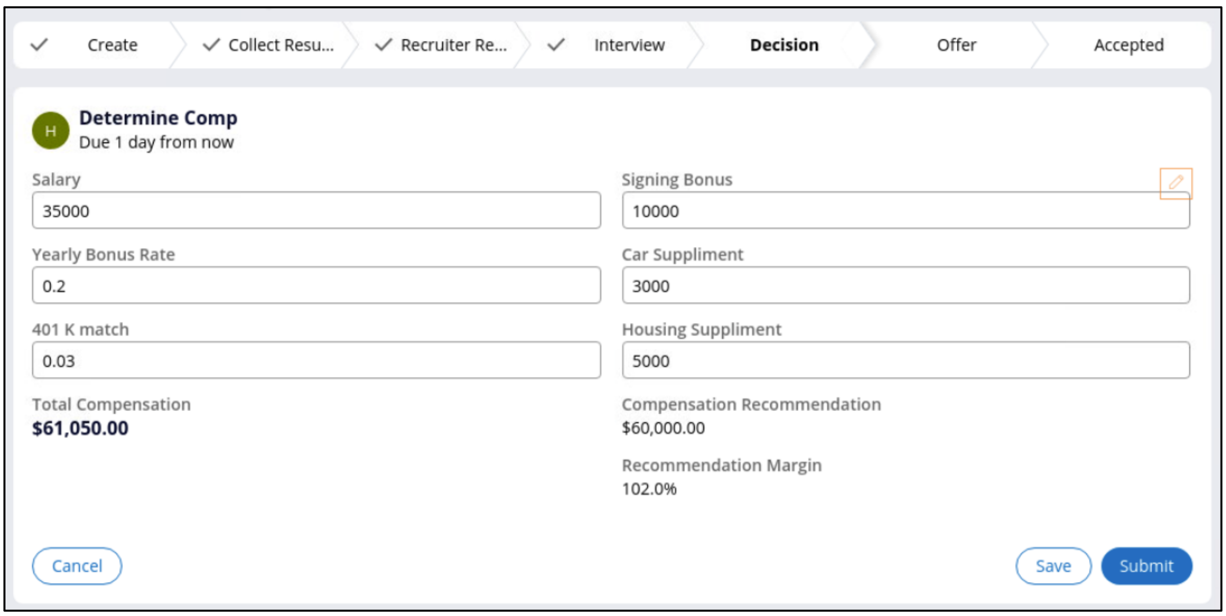
29. The following appears indicating the task is now assigned to Human Resources. Click **Go.**



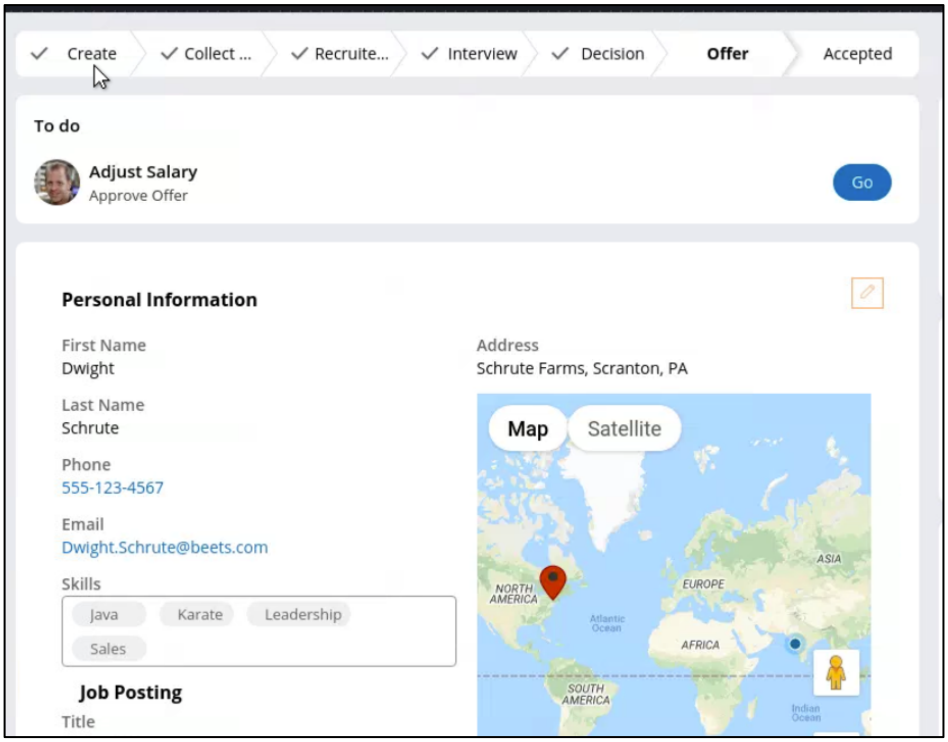
30. The Internal approval process begins. The following appears:



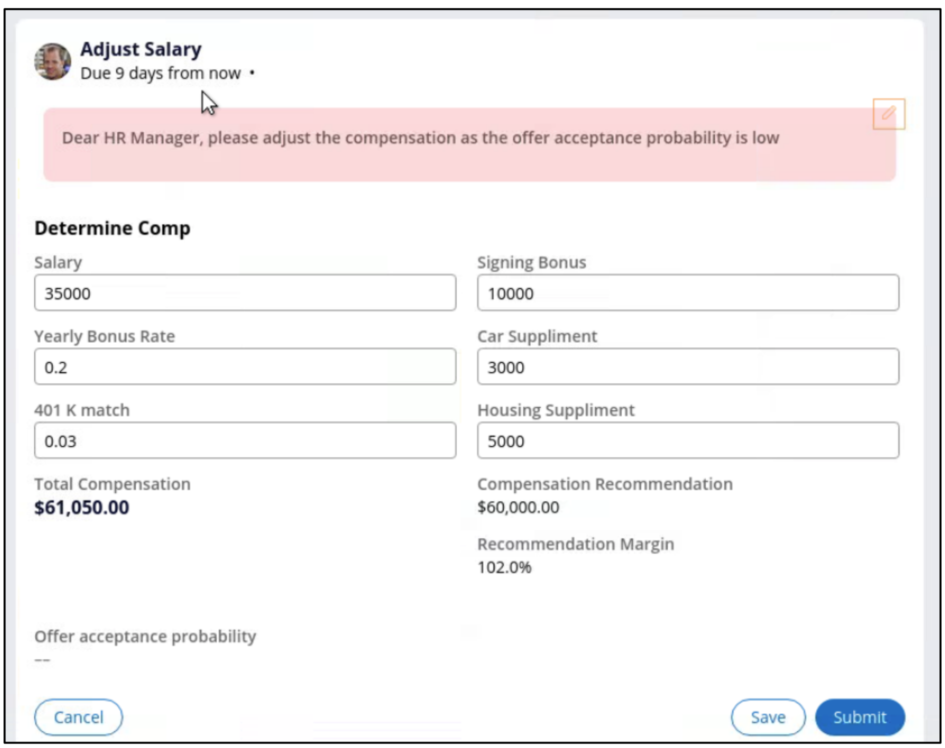
31. Review the fields. Change the **Yearly Bonus Rate to 0.2**. When you change a field the Total Compensation field recalculates. An image similar to the one below will appear. Then click **Submit**.

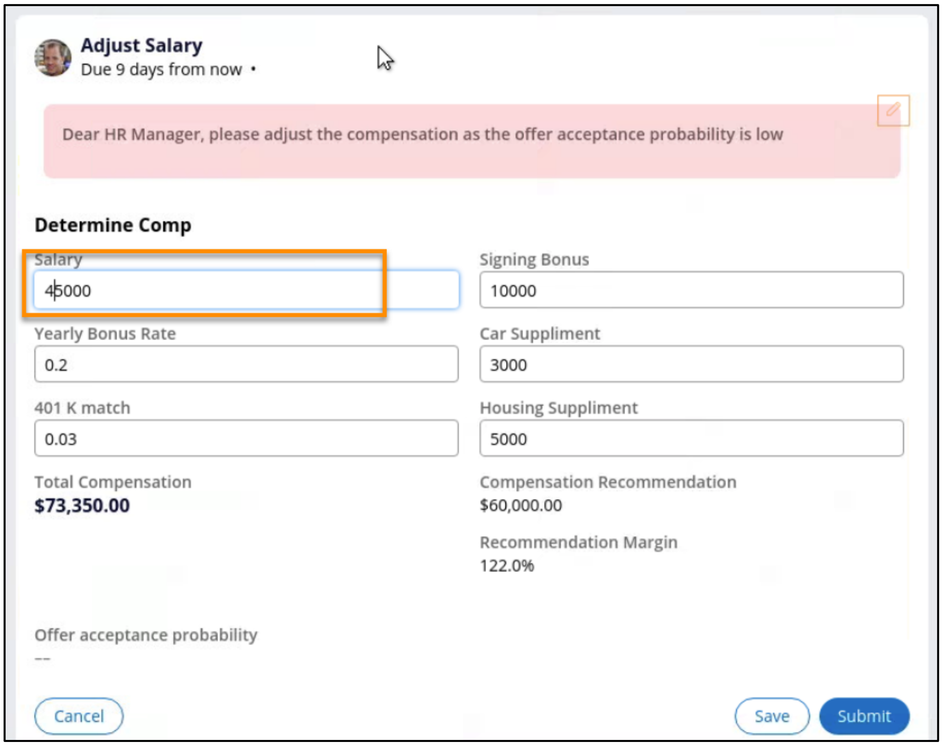


32. Click **Go** to approve the offer.

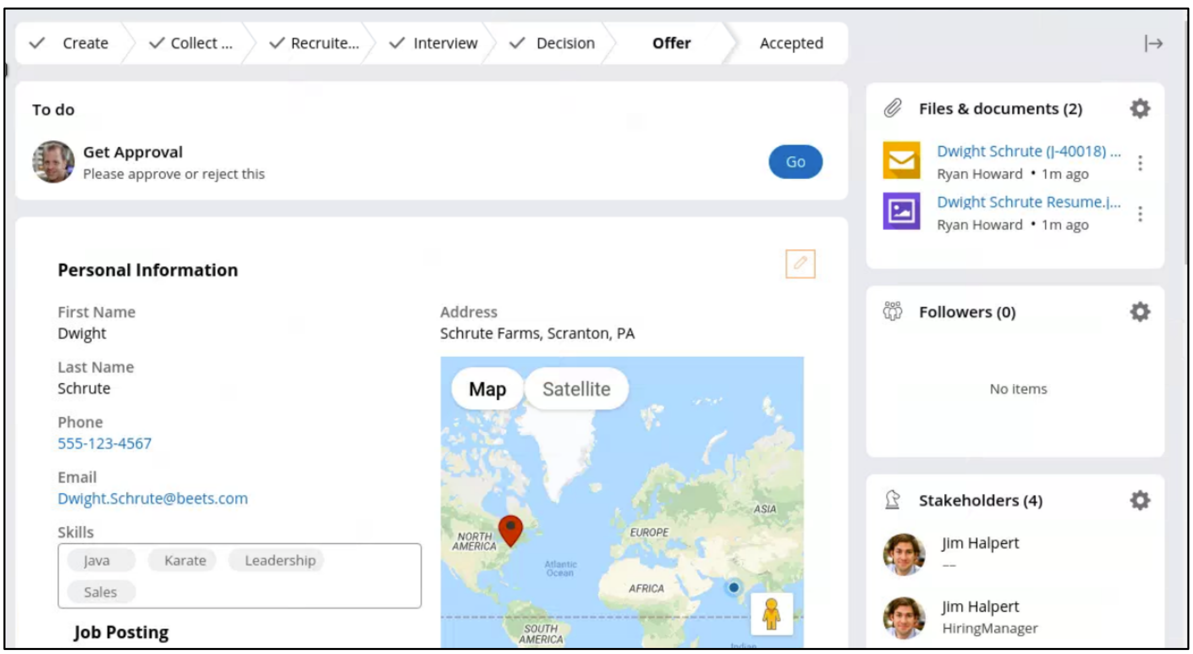


33. If the following appears the predictive model has identified that the offered salary is too low. Adjust the compensation to **45000**. Click **Submit**.

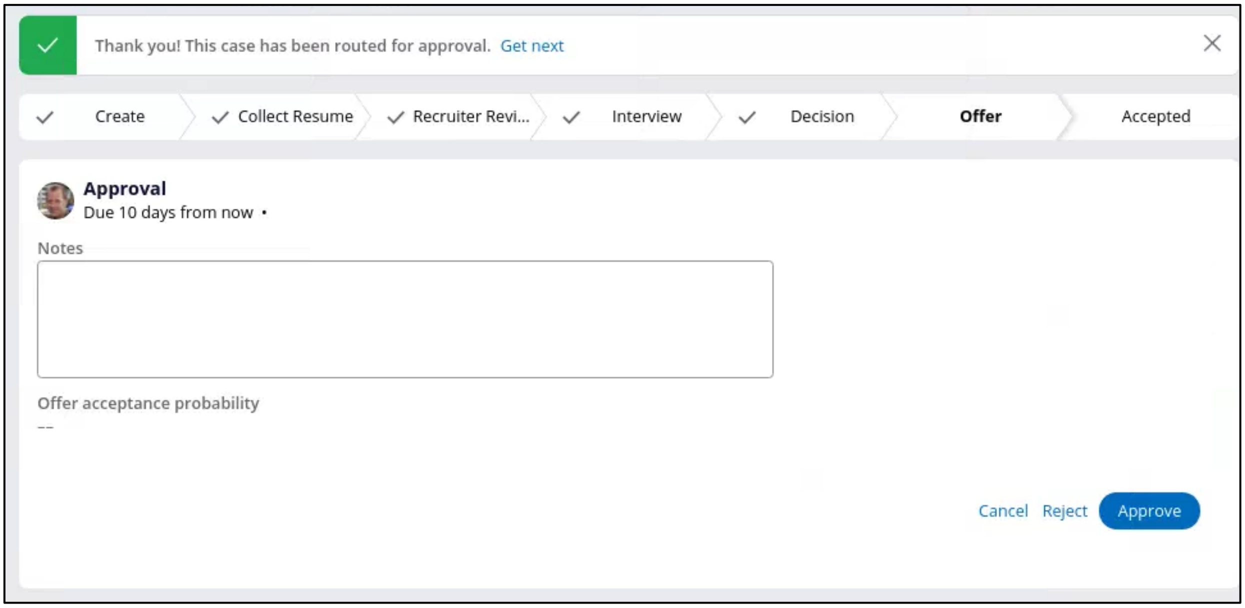




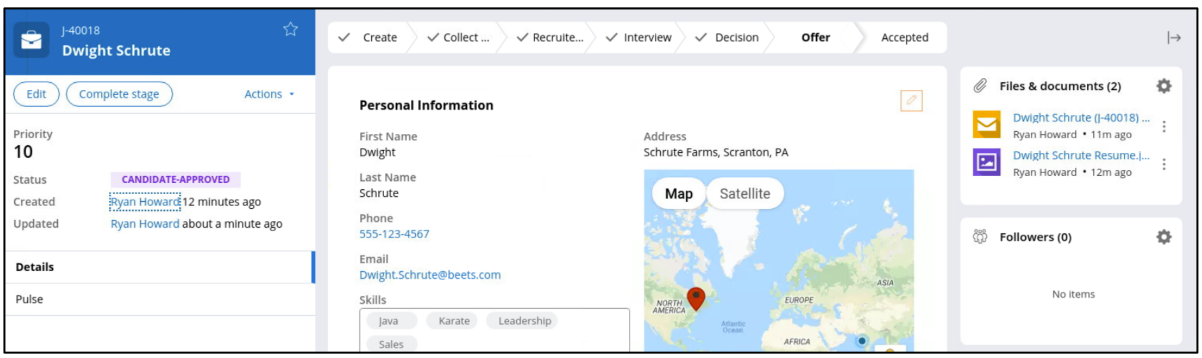
A new view like the following appears:



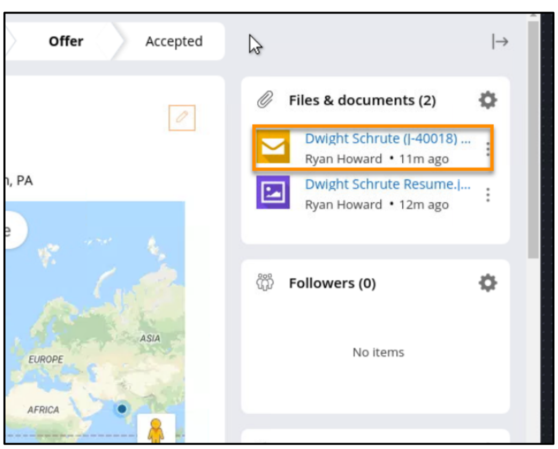
34. Click **Go** to move to the approval step then, click **Approve**.



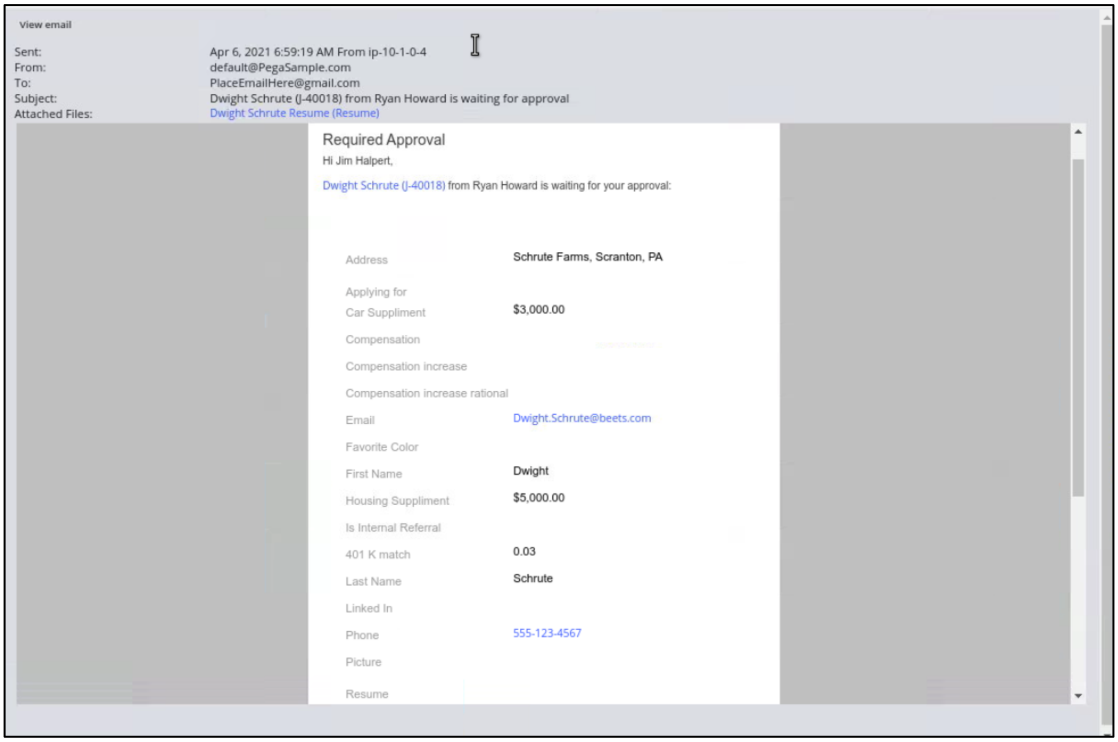
35. The following appears. The candidate is now approved.



36. In the right navigation frame, under **Files & documents (2),** a copy of the email sent to Dwight Schrute is now visible.

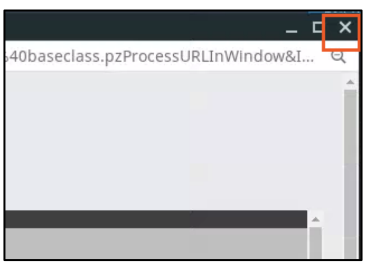


37. Click the **Correspondence** to display the copy of the email. It should appear similar to the following image.



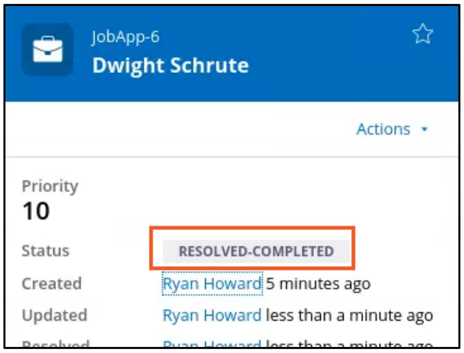
NOTE: The Correspondence will open in a new browser window. If the pop-up blocker is turned on you will not see the correspondence. Allow pop-ups from the localhost.

38. Close the correspondence window.

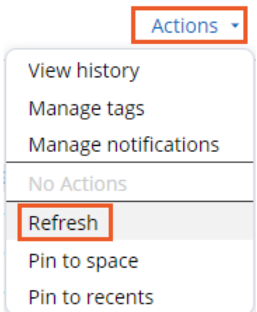


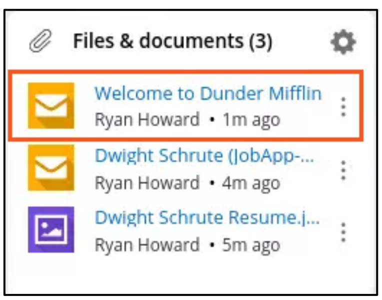
39. The case is still in the Offer stage. Click **Complete Stage** button to move to Accepted stage.

40. The case is now **Resolved-Completed**.

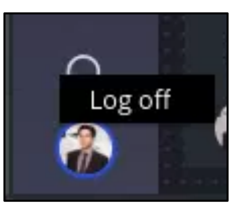


41. Click **Actions > Refresh**. And a **Welcome email** has been sent to the candidate.





42. **Log off**.



Review the Job Applicant case type

Scenario

You are a new employee of U+, a major company in the financial industry that wants to improve engagement with customers. U+ has recently released an application to handle new Job Applicants to the company. The objective of this new application is to reduce paperwork and provide a much more collaborative system for Human Resources (HR) and the other departments which need to hire staff.

You are a new employee that is not familiar with the Pega Platform or this new application. Therefore, part of your onboarding is to (a) learn about the Pega Platform and (b) see an example of how the technology is used.

You will enable branching, so you can confidently make changes and investigate the Job Applicant case type.

> **NOTE:** Changes are typically merged by the development team as part of determining what will be in the release cycle. If the changes should not be included, the team will not merge them into the application.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Ryan Howard – Citizen Developer	howar	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Enable branching

If branching is not already enabled for your login, enable branching to ensure your changes are separated from the development.

Task 2: Review the design of the Job Applicant case type

As a Citizen Developer, review the stages, processes, steps, and other elements of the Job Applicant case type.

Task 3: Review the design of the Job Applicant data model

As a Citizen Developer, review the data model of the Job Applicant case type.

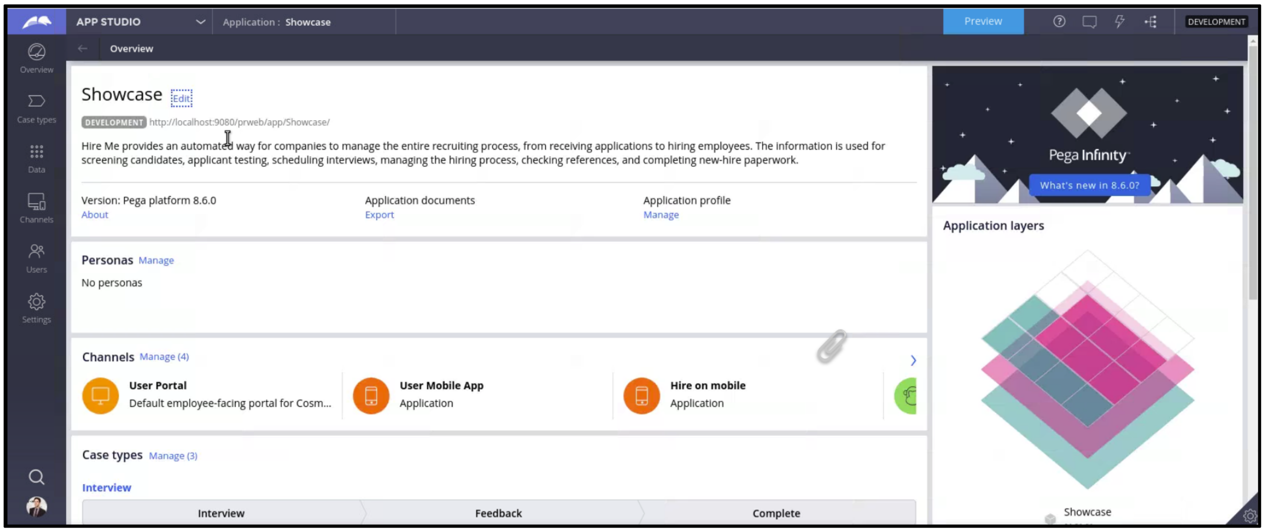
> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

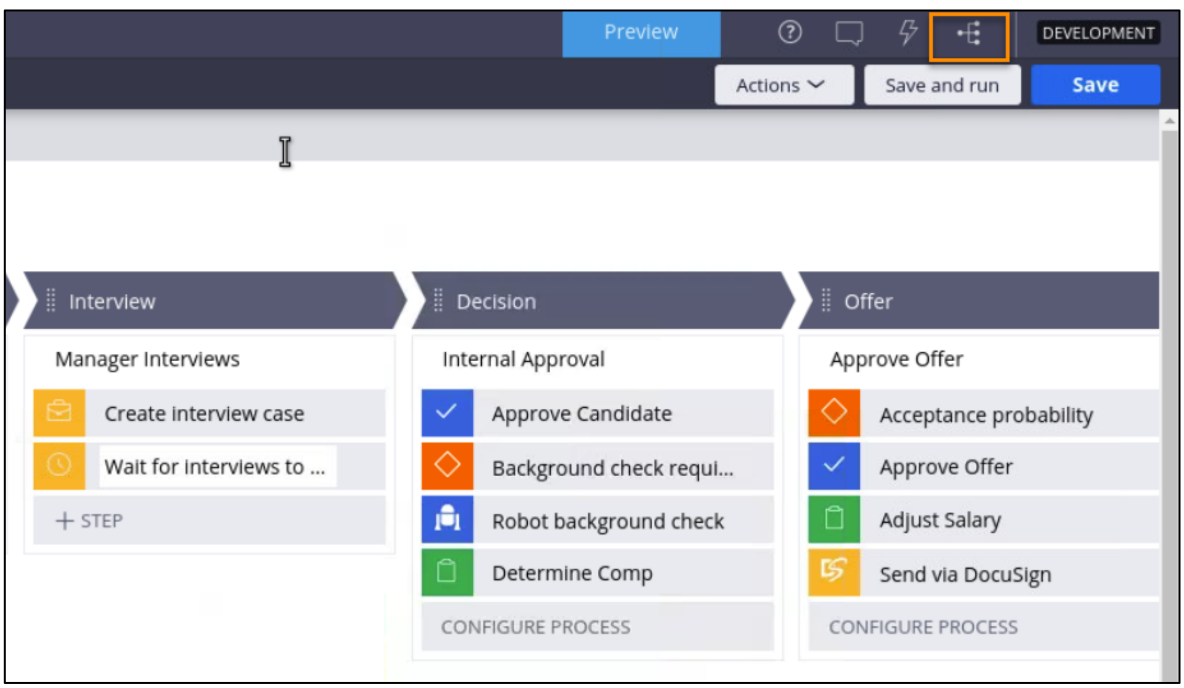
Task 1: Enable branching

As a Citizen Developer operator start a new Job Applicant case.

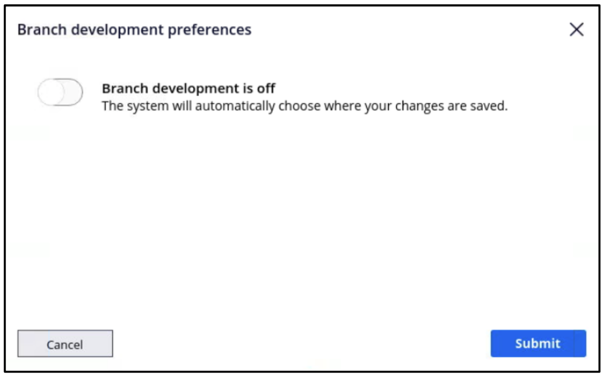
1. Log in and use the credentials **howar** and **rules.** The following appears:



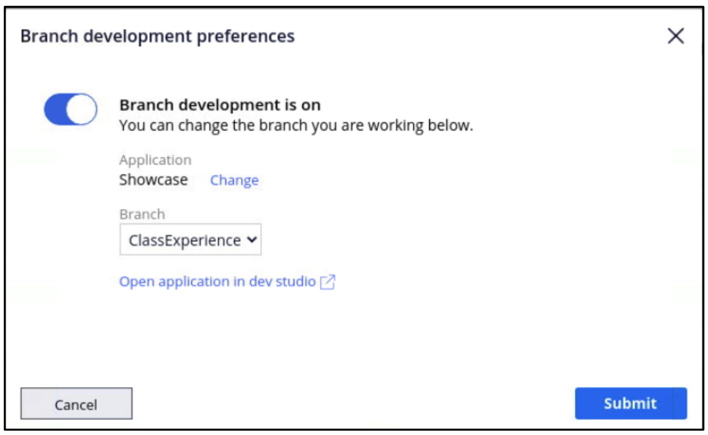
From the title bar click the Toggle branch development button.



The following appears:

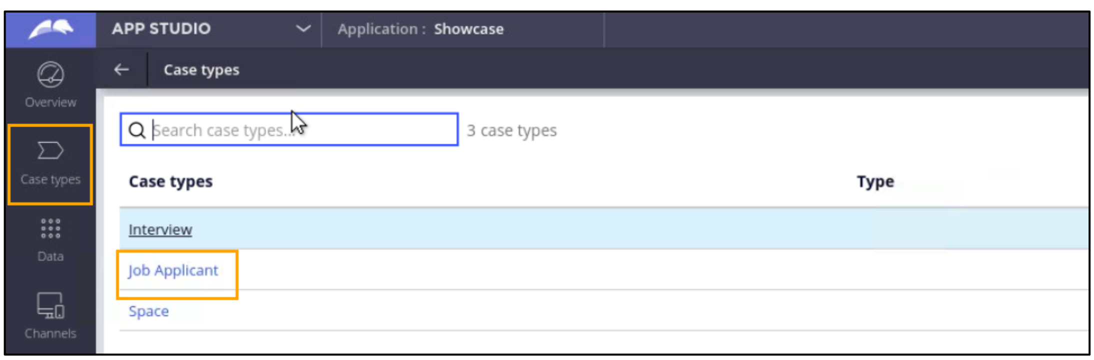


2. Move the slider to turn branch development on. In the **Branch** dropdown ensure that the Application name is **Showcase** and **ClassExperience** is selected as the branch. Click **Submit**.

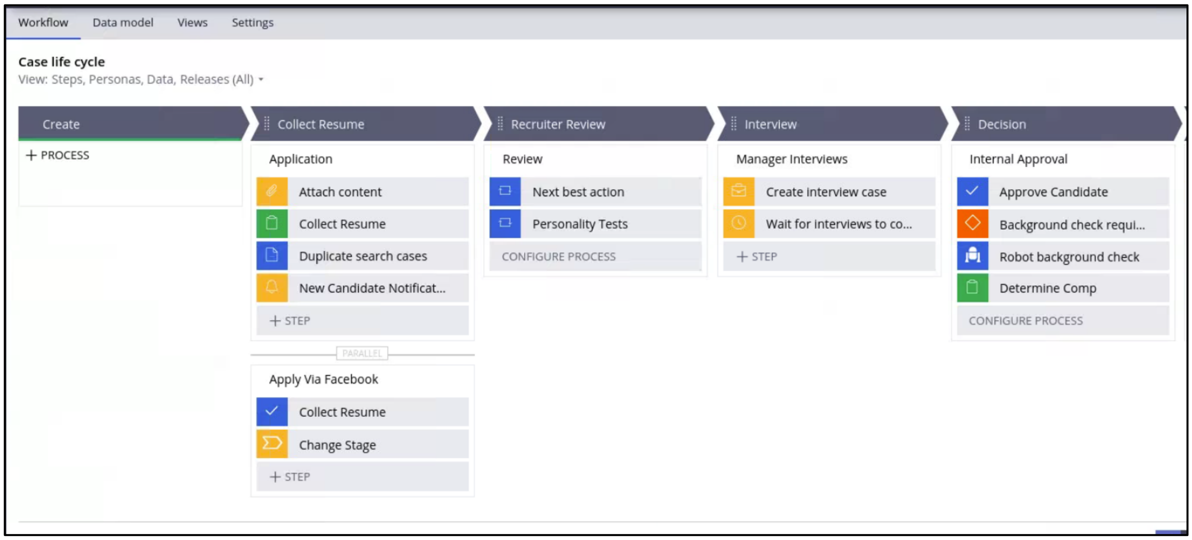


Task 2: Review the design of the Job Applicant case type

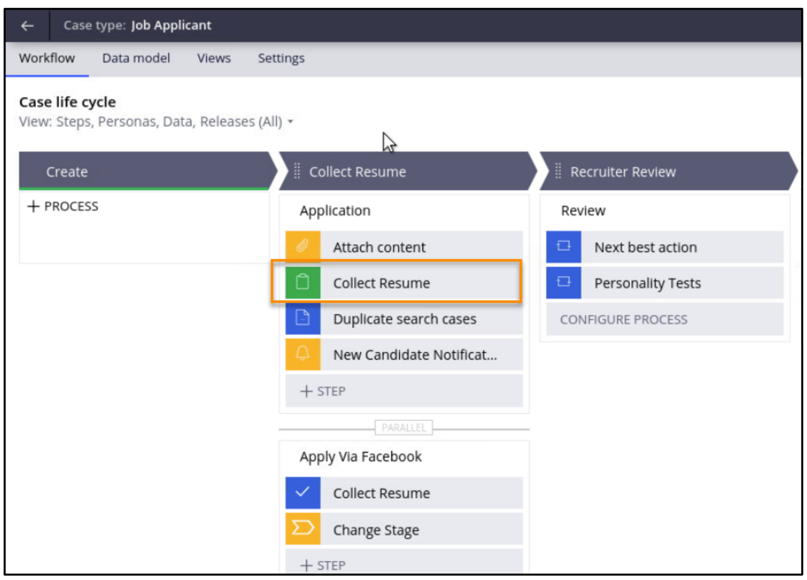
1. From **App Studio**, Select **Case types** then click **Job Applicant** to open the case type.



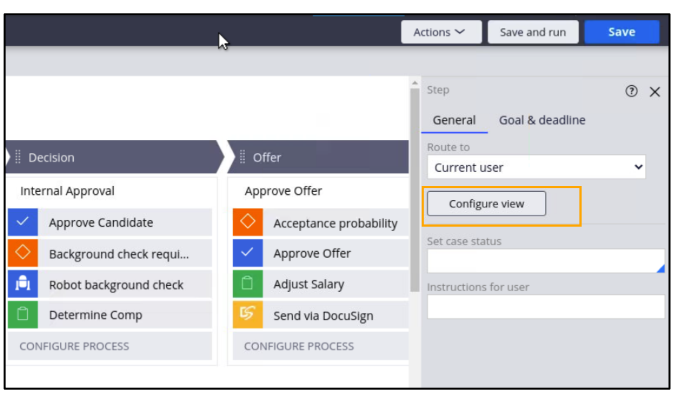
The following appears:



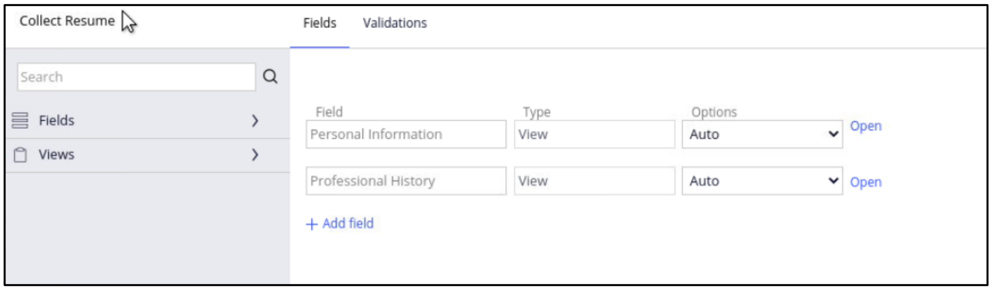
2. Click the **Collect Resume** step.



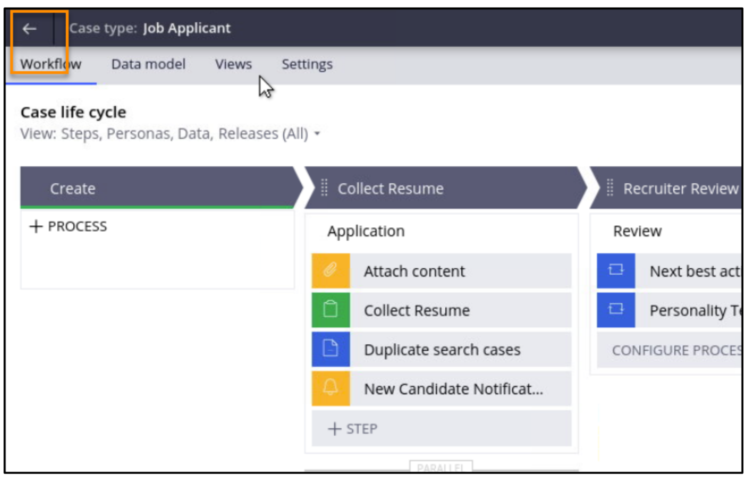
3. Click **Configure view** to see the views and fields associated with this step.



4. Two additional views are embedded in this view.



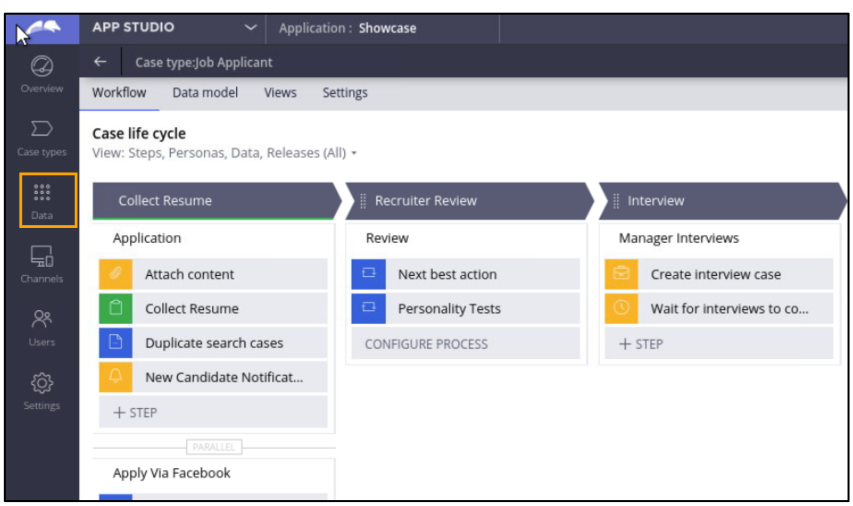
5. Click **Cancel** to close the window.
6. Take a few minutes to view the design for the other steps in the case type.
7. Close the form by going back to the previous page.



Task 3: Review the design of the Job Applicant data model

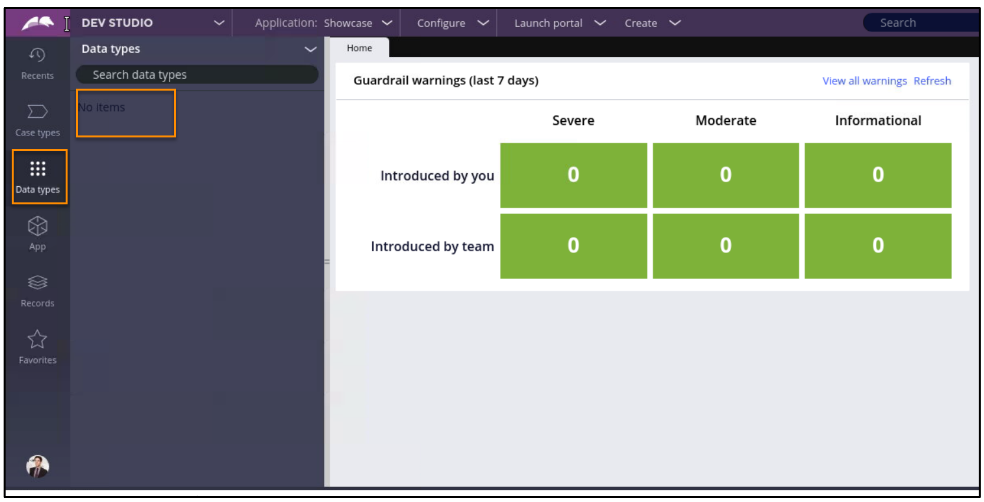
As a Citizen Developer operator review the Job Applicant data type.

1. On the left, click the **Data** button.

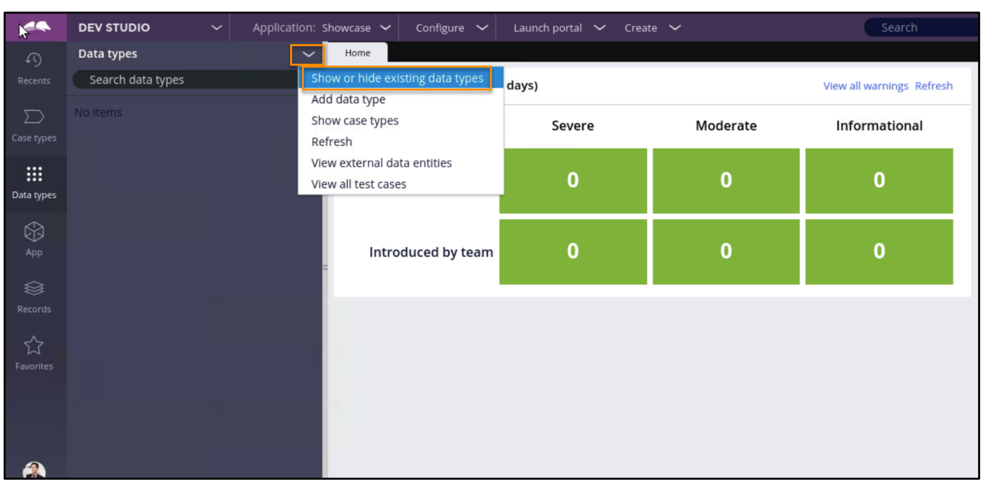


IMPORTANT: If the data types are not included in the Showcase application below screen will be displayed. If this happens follow steps 2 to 6. Otherwise jump to step 7.

2. Switch to **Dev Studio** and click on **Data types**.

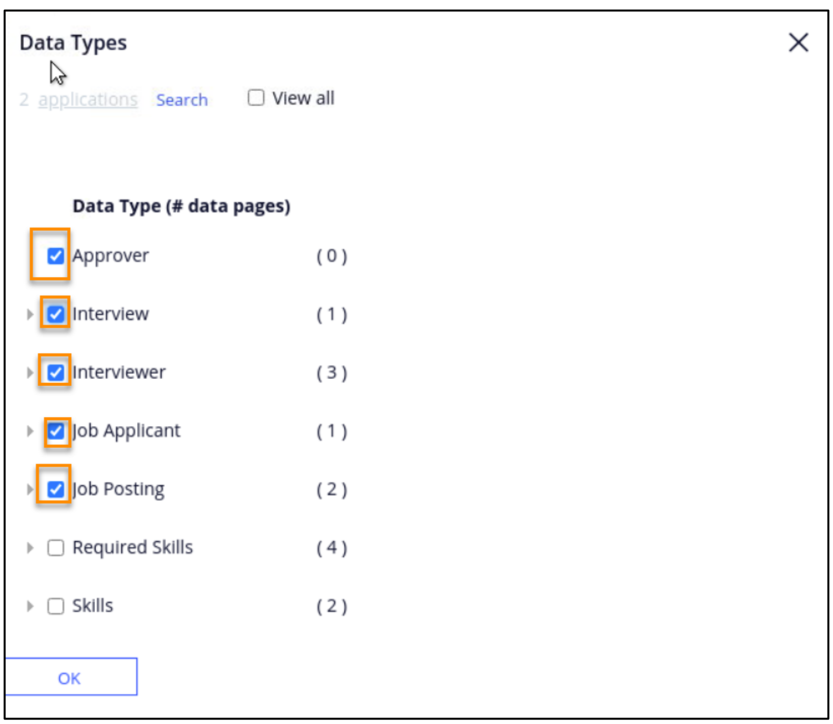


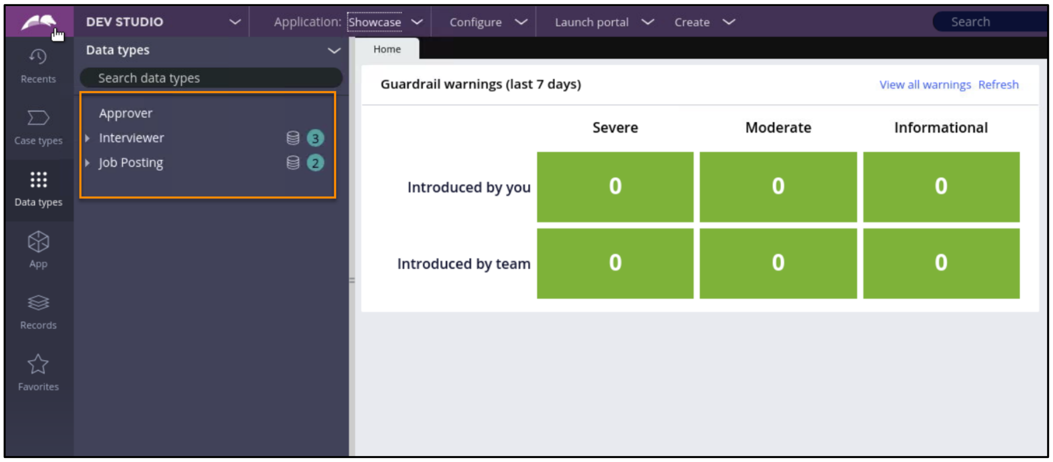
3. Click on **Show or hide existing data types.**



4. Select **Hire Me** application and click on **Apply**.

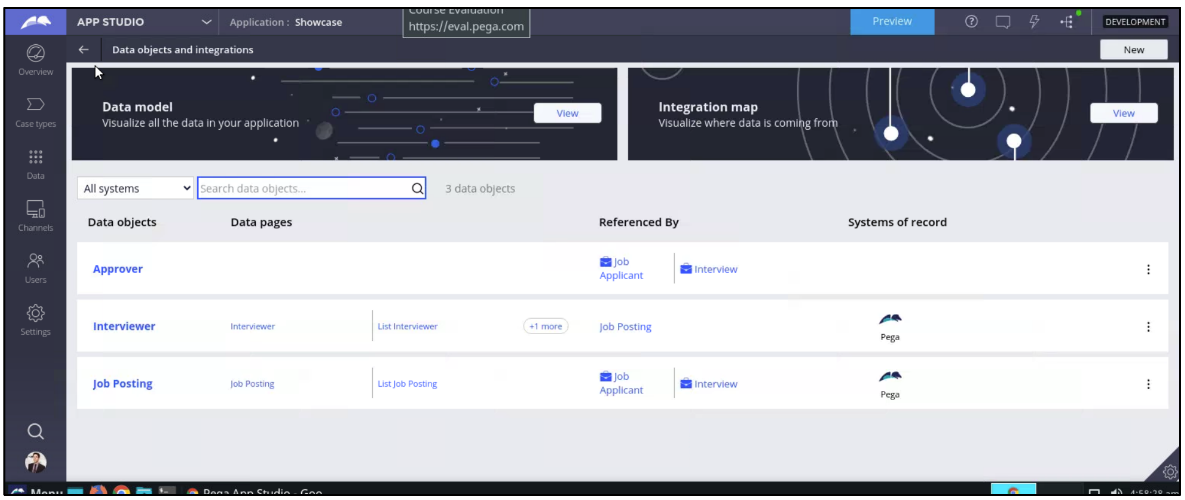
5. Select the following **Data Types** and click **OK**.



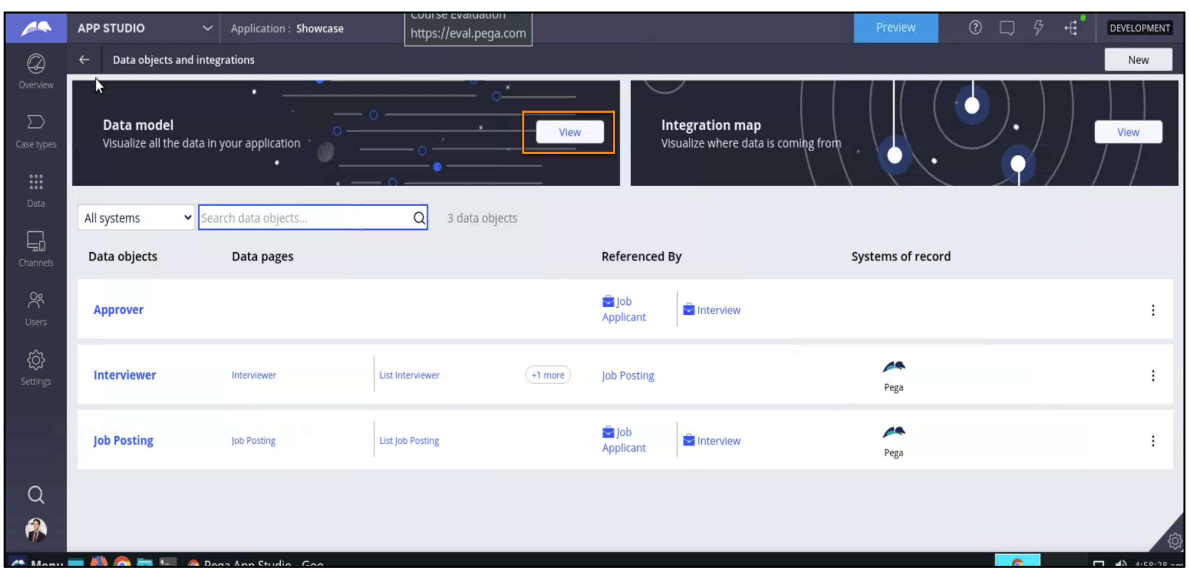


6. Switch to **App Studio** and click on **Data**.

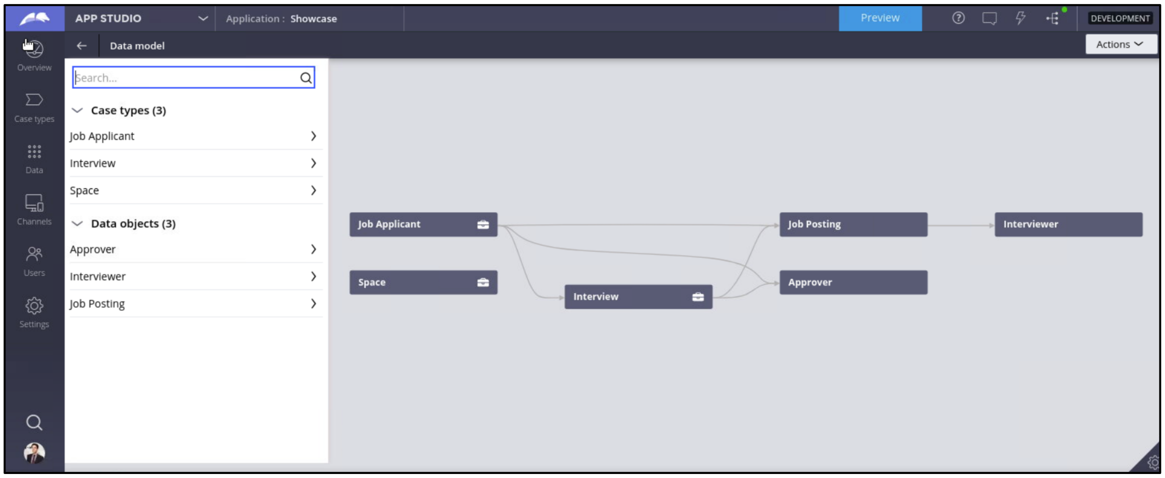
The **Data** panel appears:



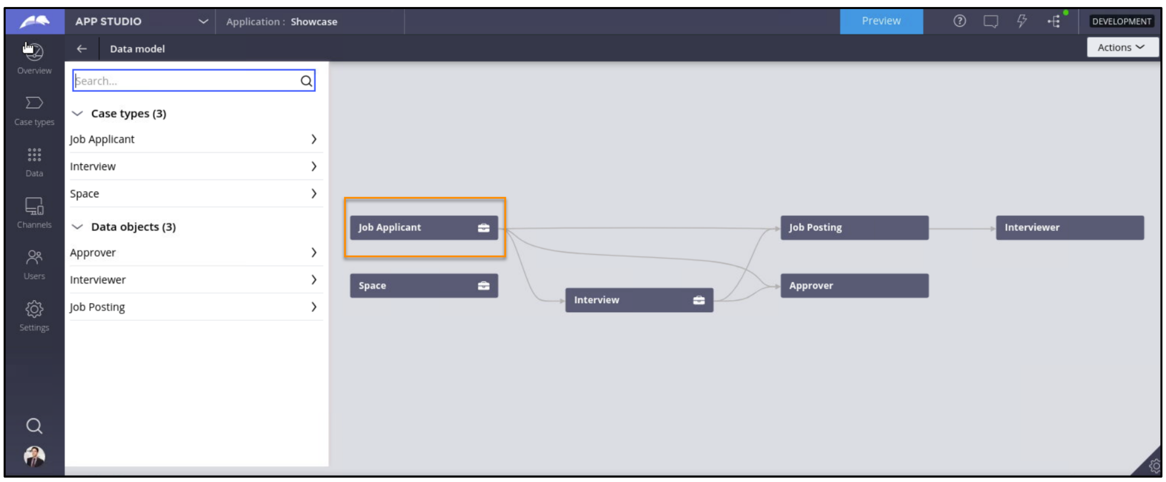
7. Click on **View** in **Data model**.



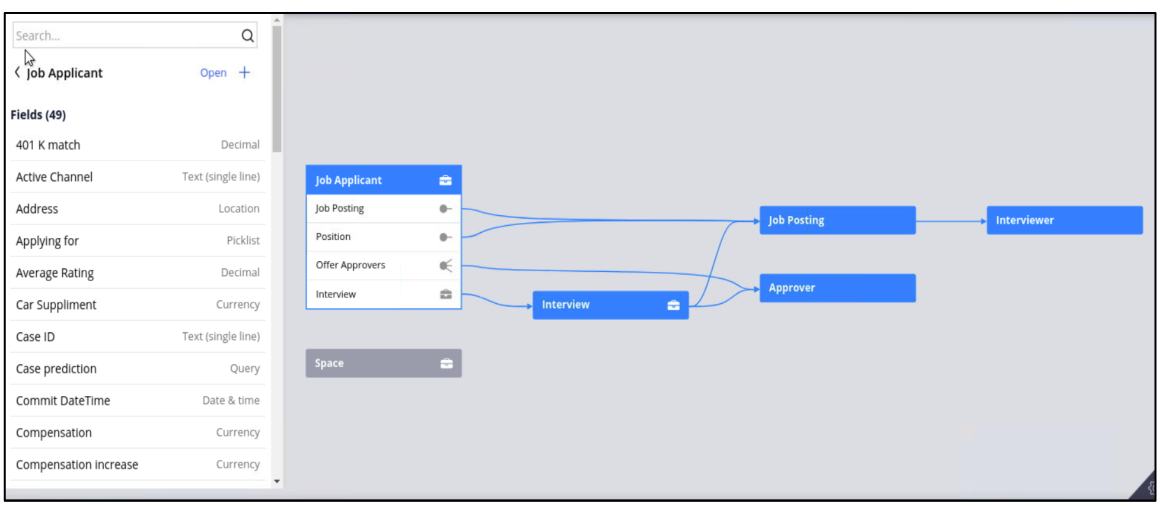
8. The Case types and data model are displayed.



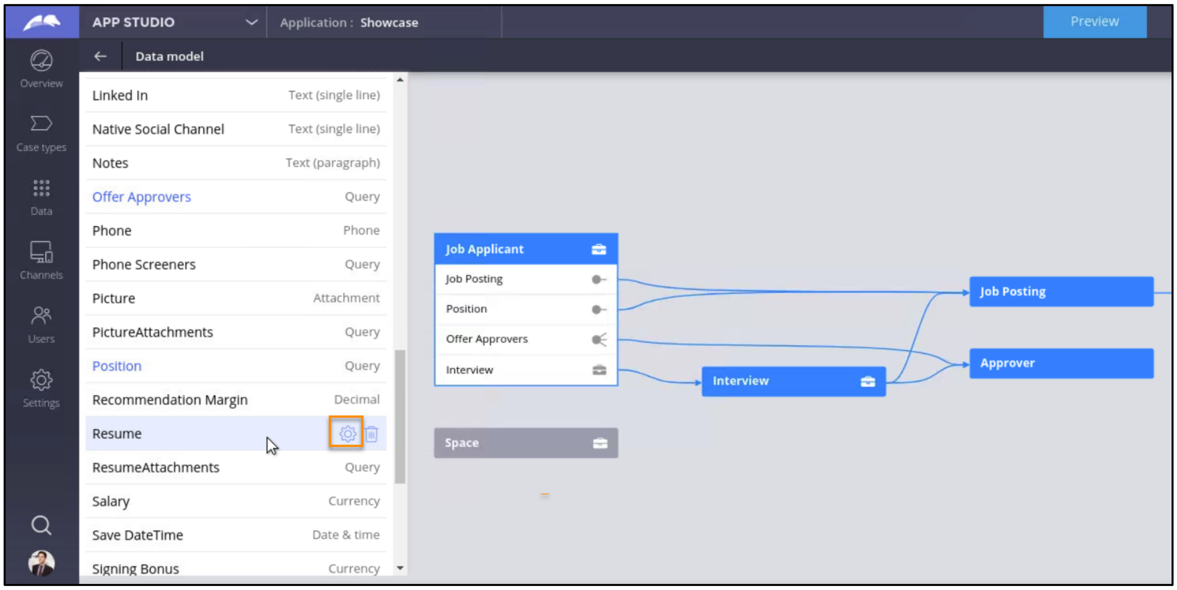
9. Click the **Job Applicant** symbol in the diagram.



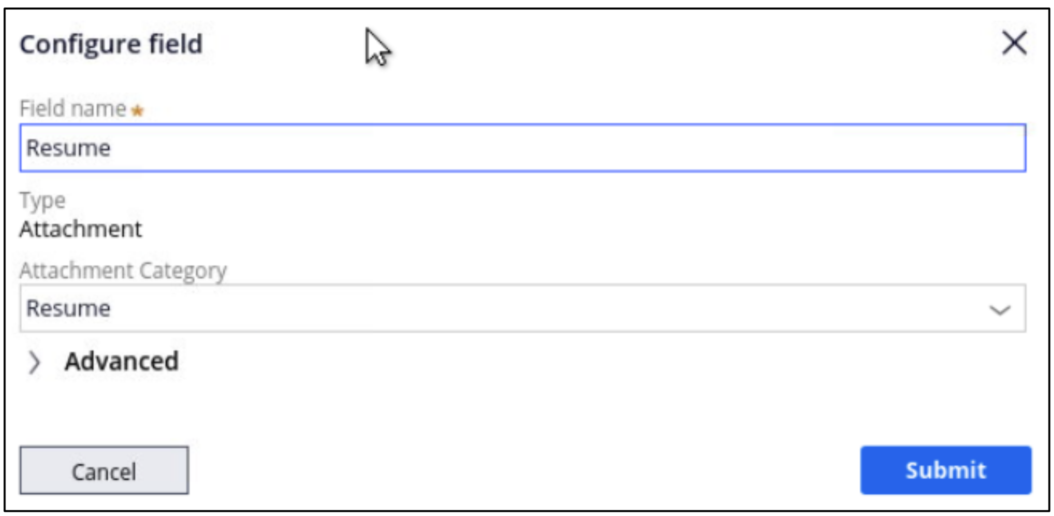
The list of associated fields is displayed.



10. Browse through the fields list (scroll vertically) and locate the field **Resume**.



11. Click the **gear** icon. The details of the field are displayed.



12. Click **Submit** to close the window.

13. **Log Off**.

Modify the Job Applicant case type

Scenario

Business stakeholders have requested modifications to the processing of the Job Applicant case type.

As our Citizen Developer, you will enable branching so you can confidently make changes to the Job Applicant case type.

> **NOTE:** Changes are typically merged by the development team as part of determining what will be in the release cycle. If the changes should not be included, the team will not merge them into the application.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Ryan Howard – Citizen Developer	howar	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branching

If branching is not already enabled for your log in, enable branching to ensure your changes are separated for development.

Task 2: Modify the design of Job Applicant case type

Stakeholders have requested that the following changes are made:

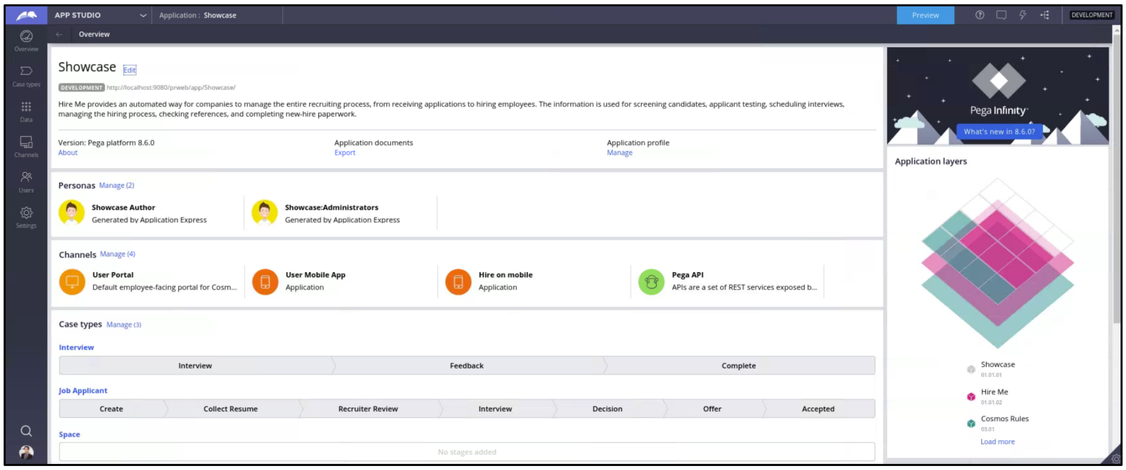
- The CaseID should start with JobApp-
- Put the case in Pending-SalaryAdjustment when on the Adjust Salary step
- Capture the desired start date of employment

> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

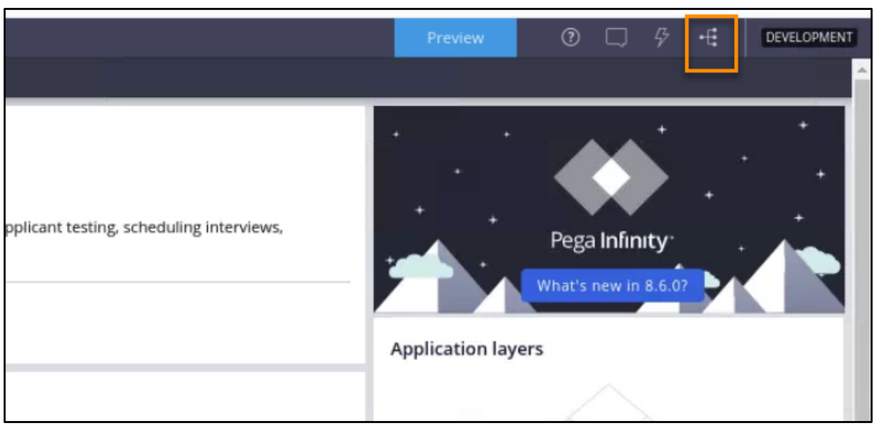
Task 1: Login and enable branching

1. Log in and use the credentials **howar** and **rules**. The following appears:

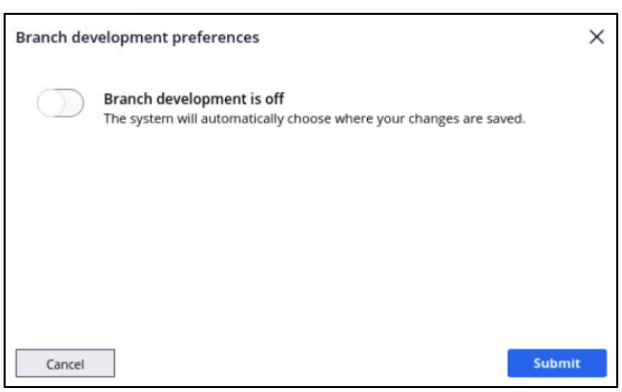


2. From the title bar click the Toggle branch development button.

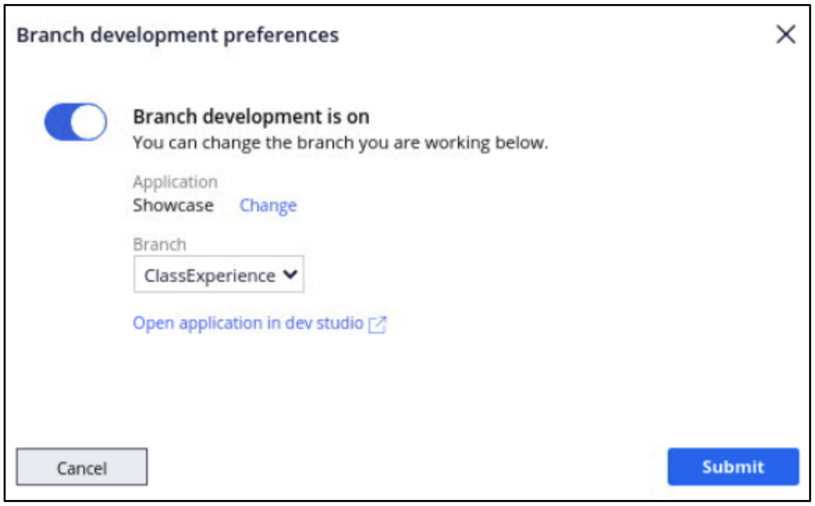
> **Note:** If branching is already turned on skip this step 2 and also step 3.



The following appears:



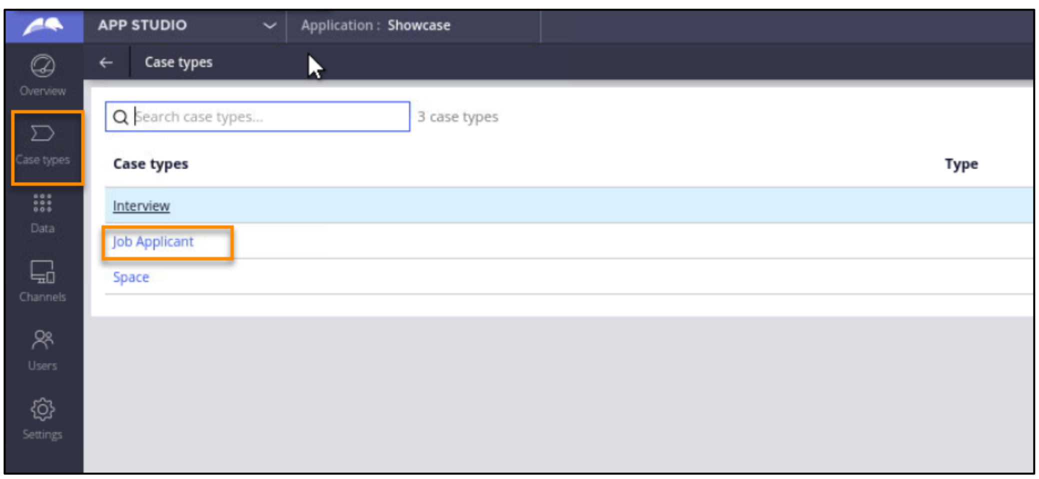
3. Move the slider to turn branch development on. From the **Branch** dropdown confirm that **ClassExperience** is selected and click **Submit**.



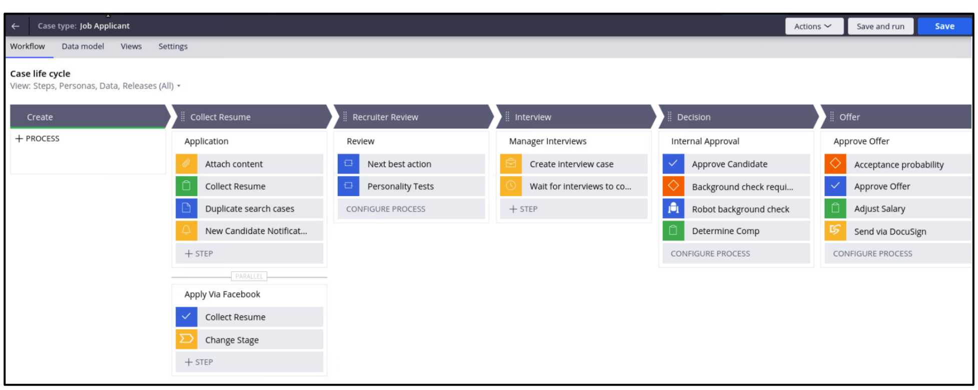
Task 2: Modify the design of Job Applicant case type

Change the CaseID

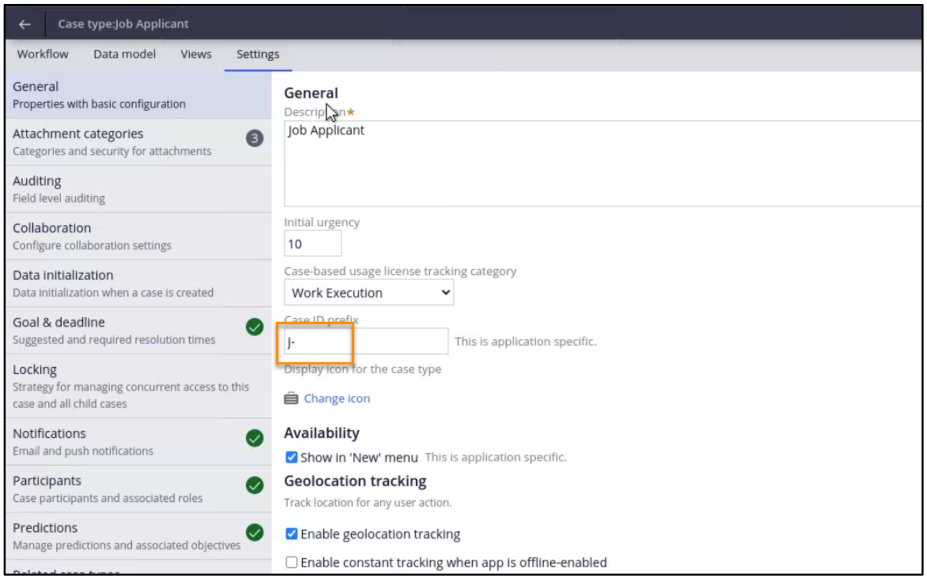
1. From **App Studio**, select **Case types** then click **Job Applicant** to open the case type.



The following appears:



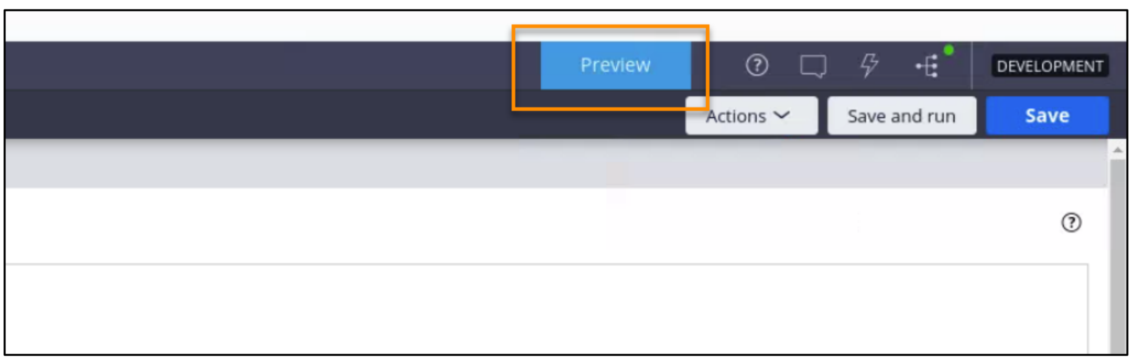
2. Click the **Settings** tab and change the **CaseID prefix** from **JopApp-** to **J-** .



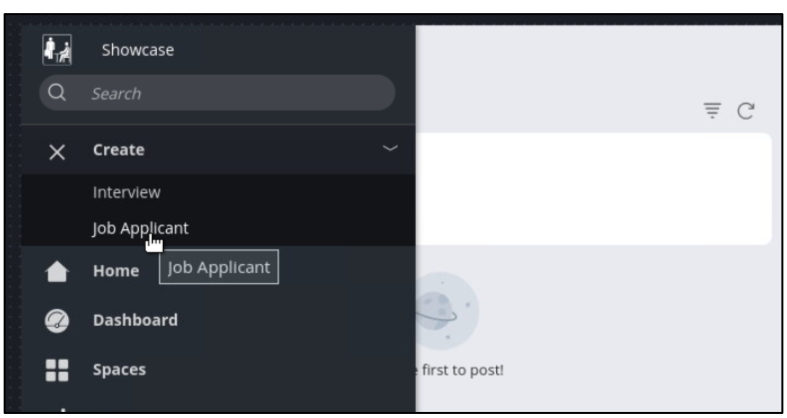
3. Click **Save**.

Test by running a new case

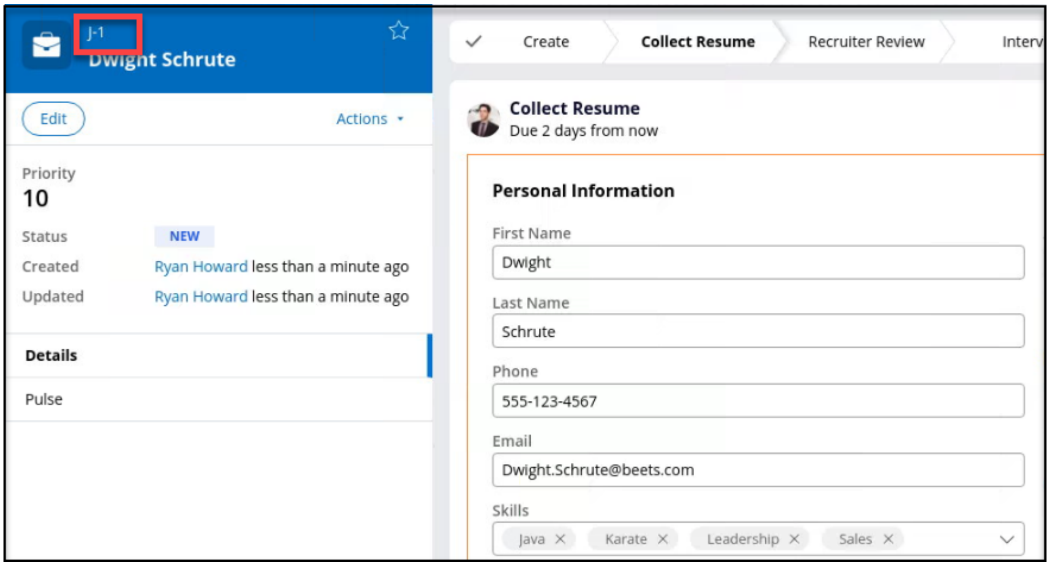
1. Switch to preview application by clicking the light blue **Preview** button.



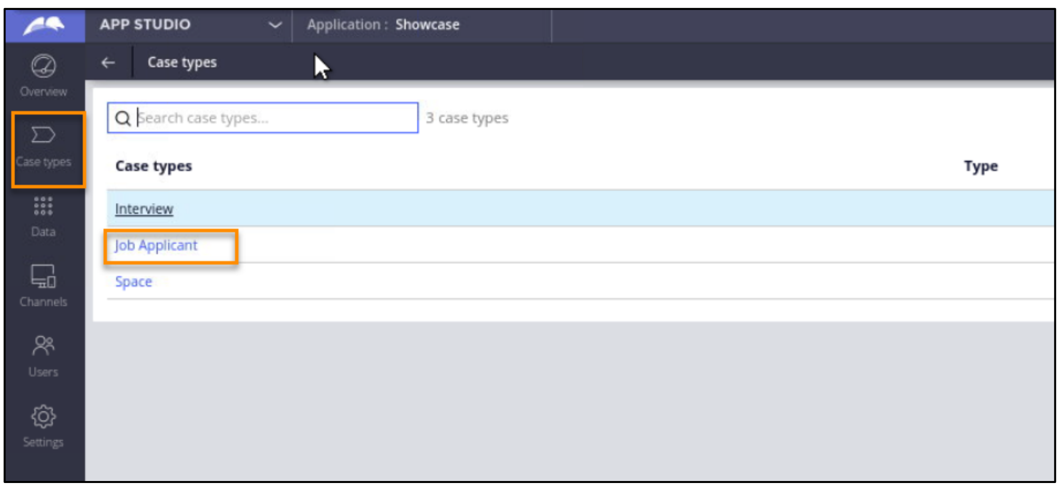
2. Create a new **Job Applicant** case.



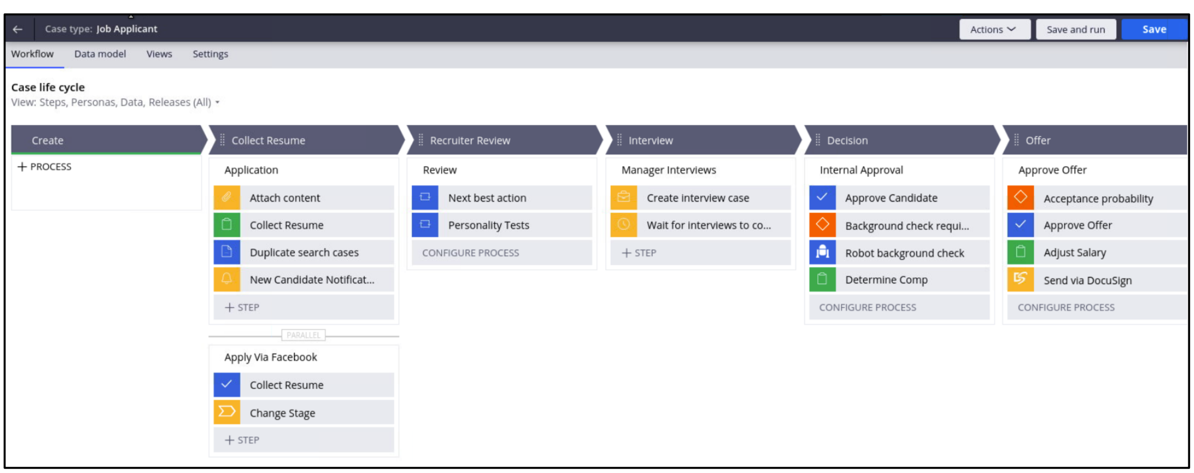
3. Confirm the CaseID has started over with the new prefix **J-**



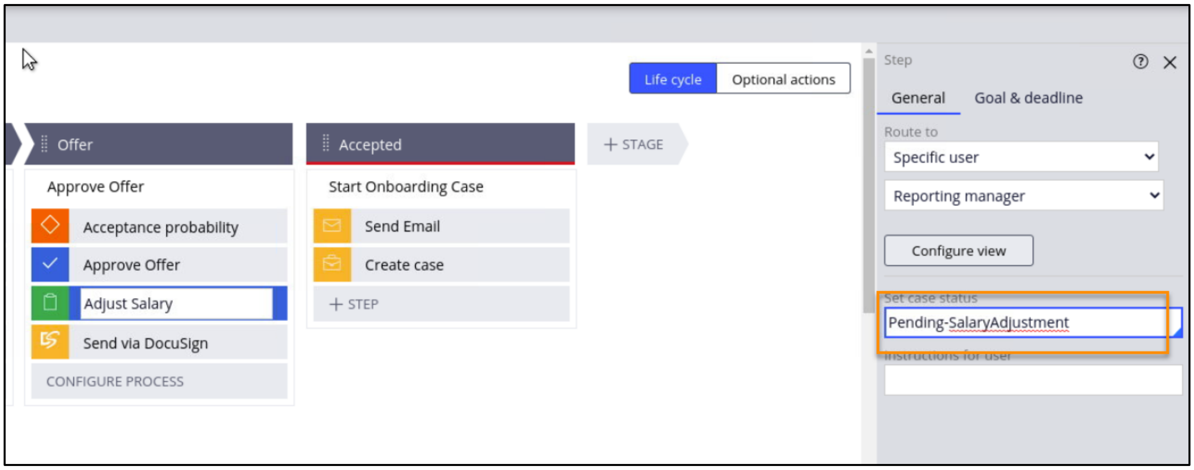
4. From **App Studio**, click **Case types** then click **Job Applicant** to open the case type.



The following appears:

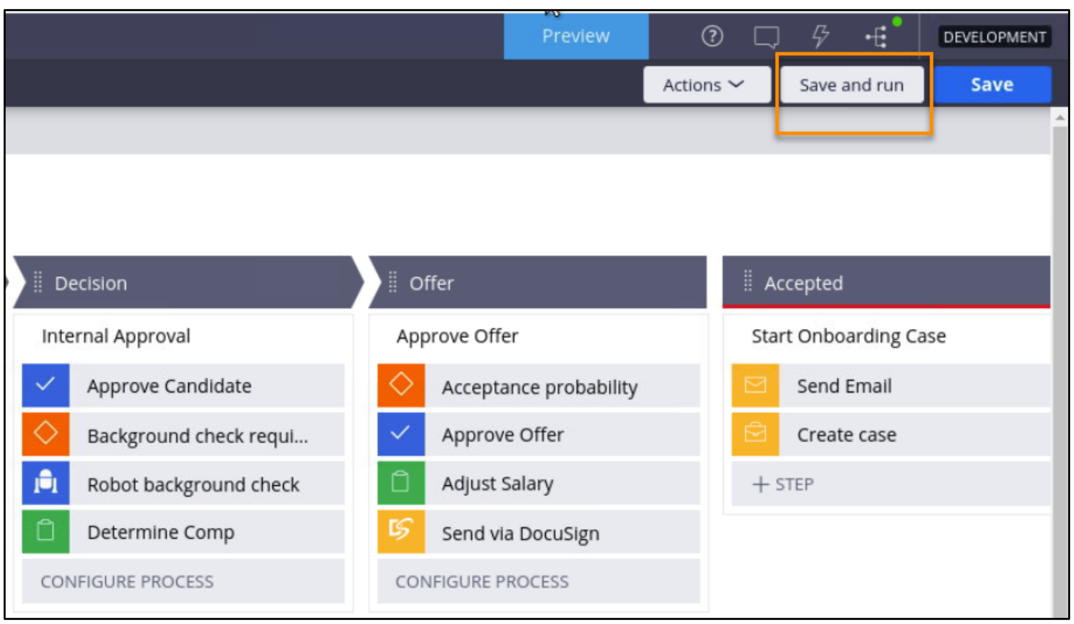


5. Click the step **Adjust Salary**. The status does not yet exist. Type **Pending-SalaryAdjustment** into the **set case status** field.

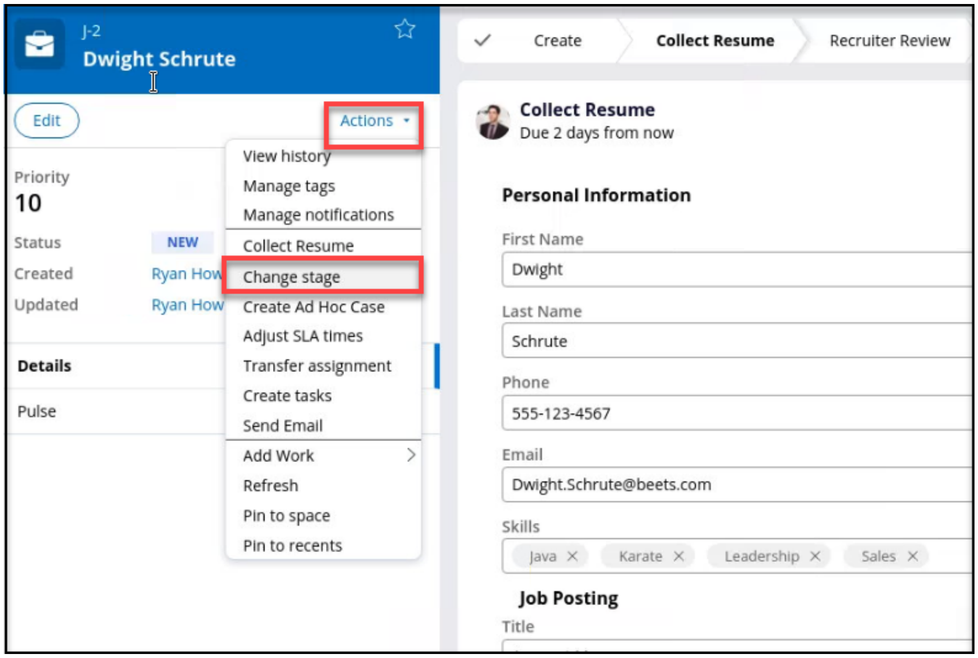


NOTE: When in design mode, fields with a blue triangle in the corner are dropdowns that are activated by clicking the down arrow on your keyboard.

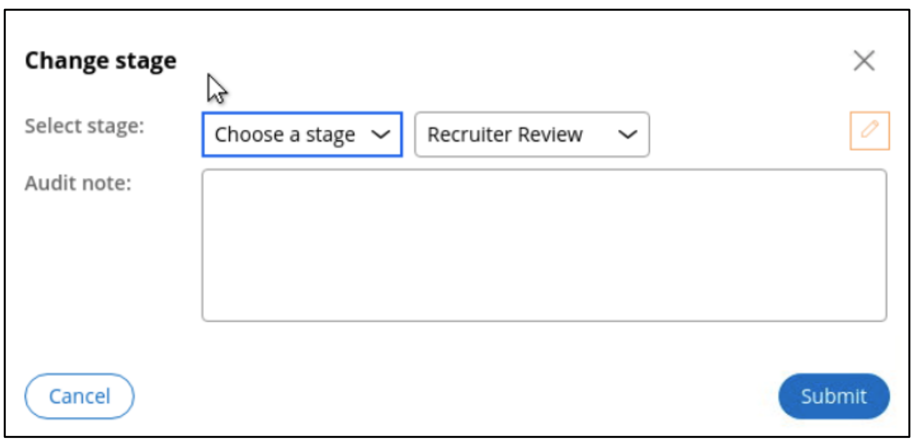
6. Click **Save and Run.**



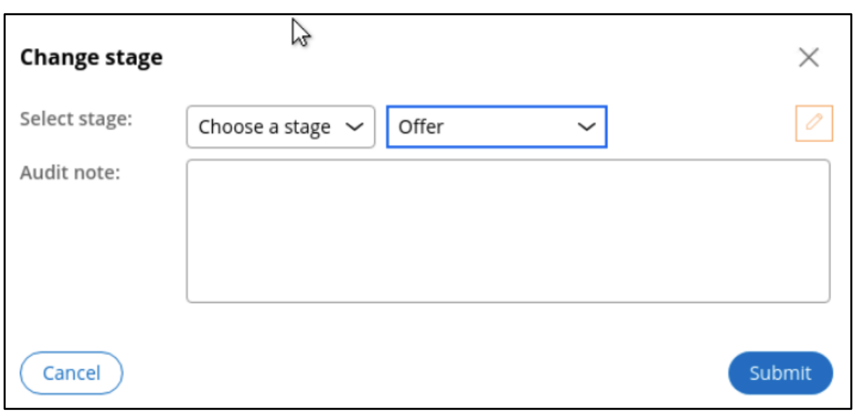
7. A new **J-** case has been started. Click **Actions** and **Change stage**.



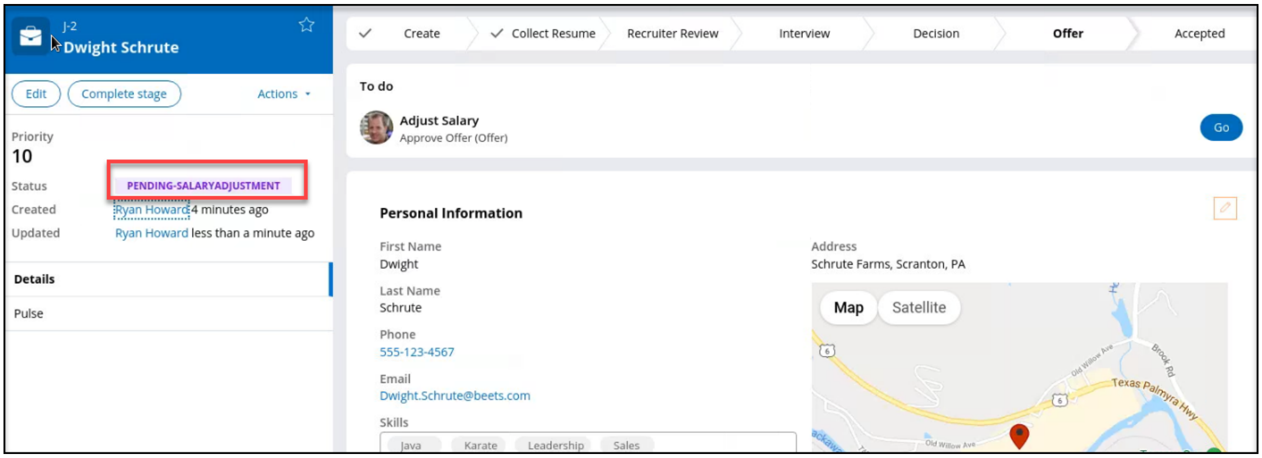
8. Change **Next stage** to **Choose a stage.**



9. Change **Recruiter Review** to **Offer**. Click **Submit**.



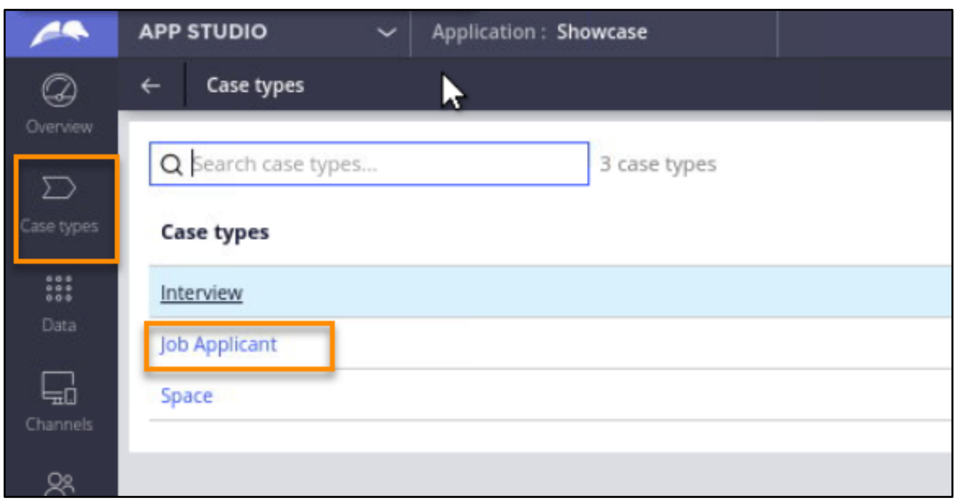
10. The case moves to the **Adjust Salary** step under the **Offer** stage and the status changes to **Pending-SalaryAdjustment**.



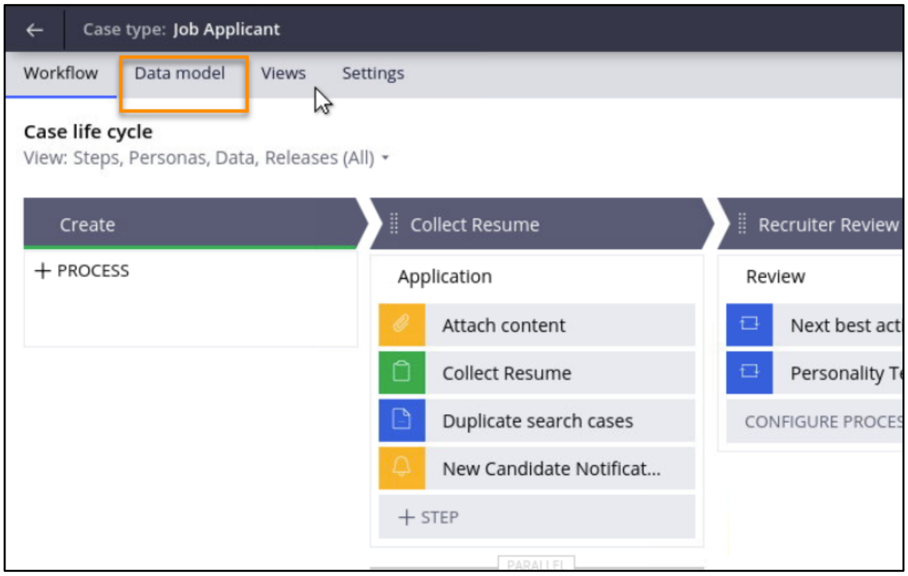
NOTE: If you do not arrive at the Adjust Salary assignment to see your change it is likely because the probability of accepting has been changed based on previous cases you have completed. The probability of acceptance is based on case history of accepting the salary for this position. You will need to run the case again and fill out every form. At the Determine Compensation step you set a very low salary. Or you will need to run the case a few times setting the salary very high so that the probability has been primed for a high salary.

Capture the desired start date for employment

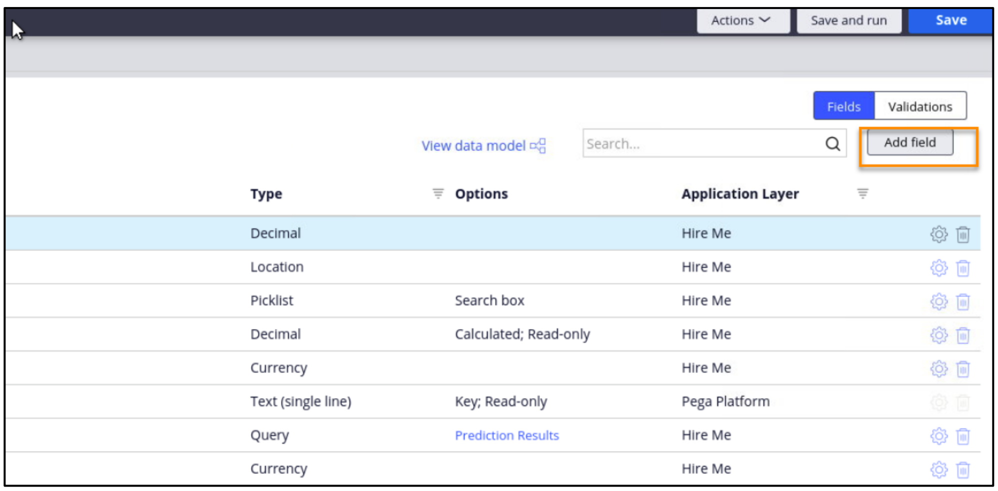
11. From **App Studio**, click **Case types** then click **Job Applicant** to open the case type.



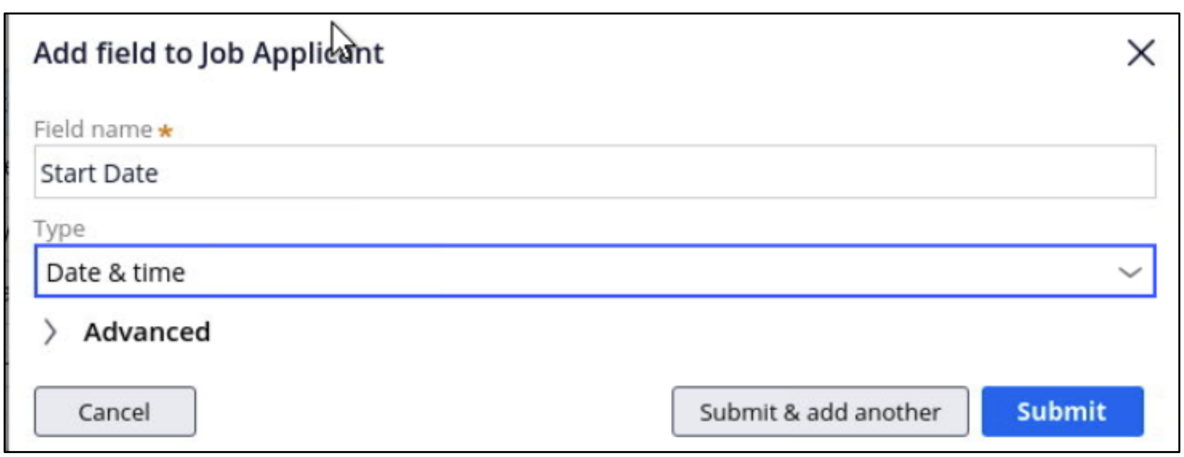
12. Select the **Data model** tab.



13. On the right corner click the **Add field** button.

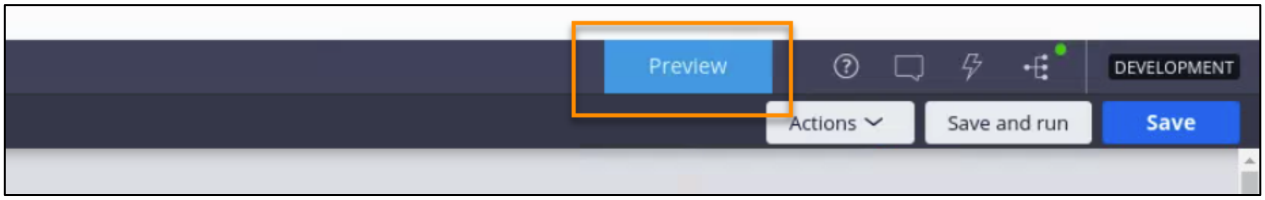


14. In **Field name** enter **Start Date**, and for **Type** enter **Date & time**. Click **Submit.**



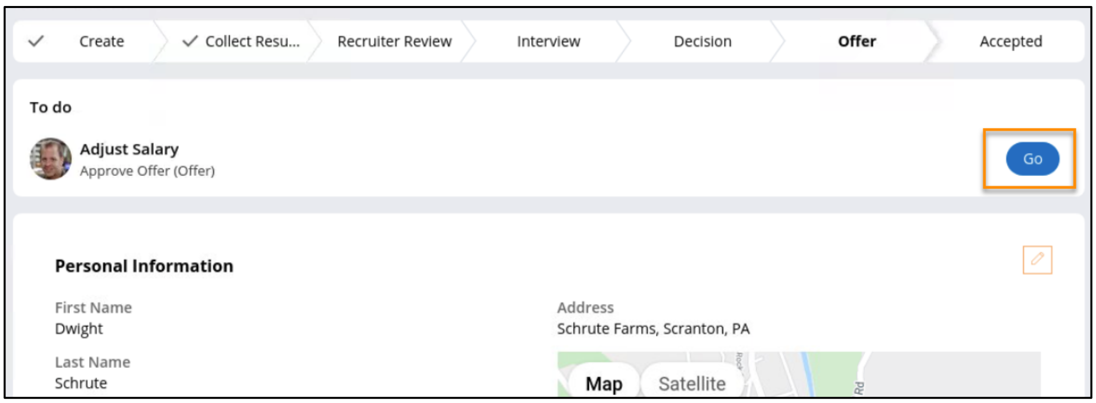
NOTE: Once you click on **Submit,** the **Start Date** property will be created. If you accidentally create the property with the wrong type, delete the property by using the trashcan icon and then add the field again.

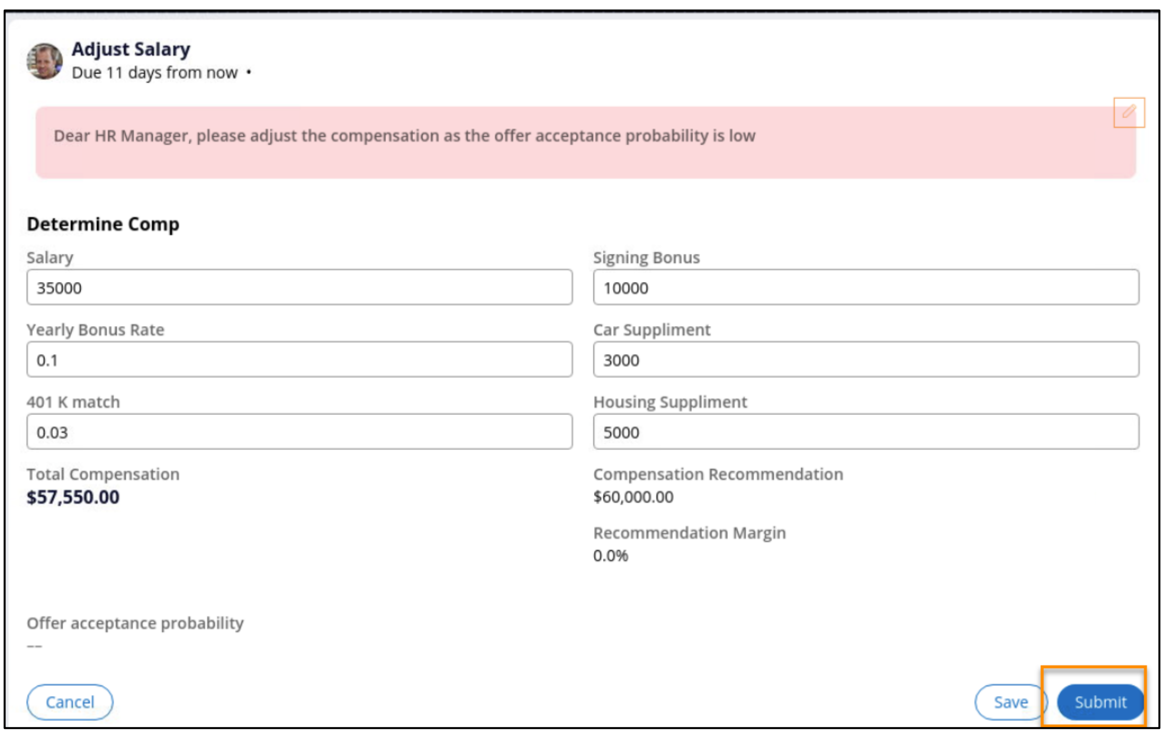
15. Click **Save** and **Preview.**



16. Either run a new case or if the last case was left open in the Offer Stage on the screen:

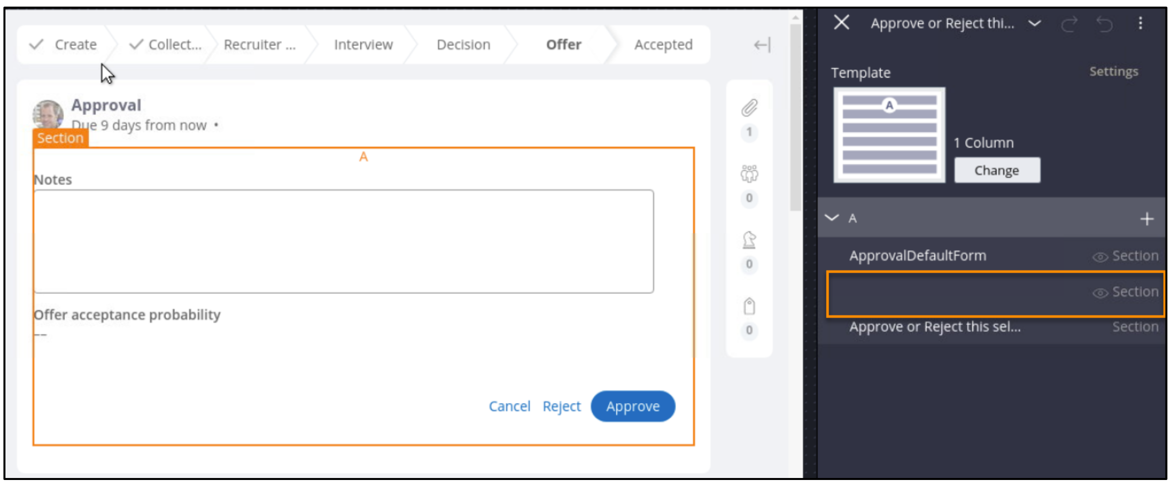
To complete **Adjust Salary,** click on **Go** and **Submit.**

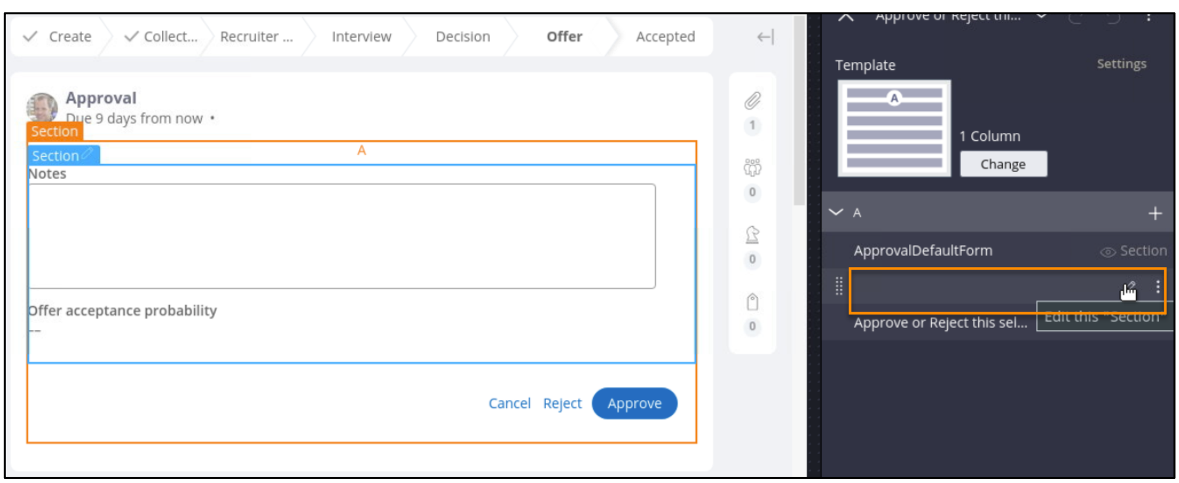




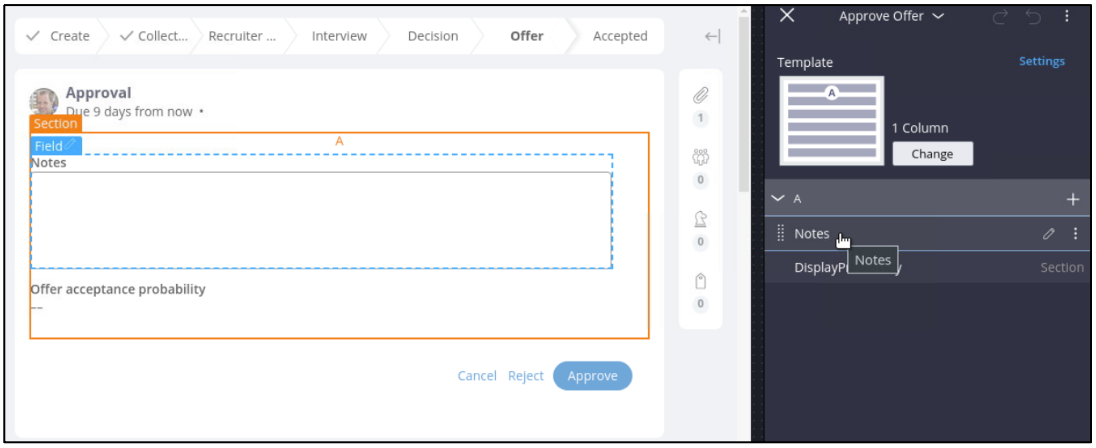
17. Click on **Go** to open the **Approval** screen and navigate to the pencil icon.

18. Click the pencil icon to configure this view. A grey panel will open to the right. Click the blank section under **ApprovalDefaultForm**.



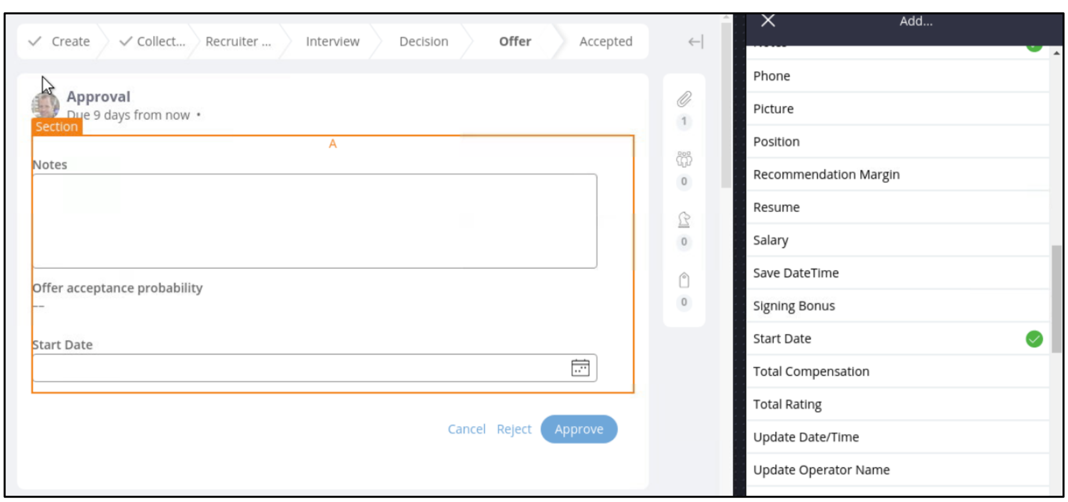


19. Once activated, click on the **Notes** text area location. The grey area will change to reflect that portion of the screen available to edit in real-time.

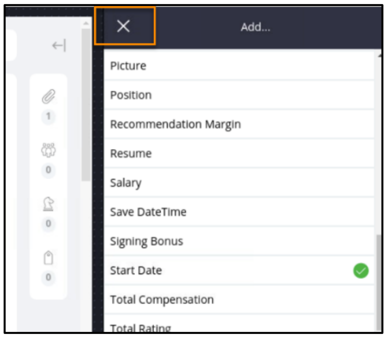


20. Click the plus icon to add the field you just created.

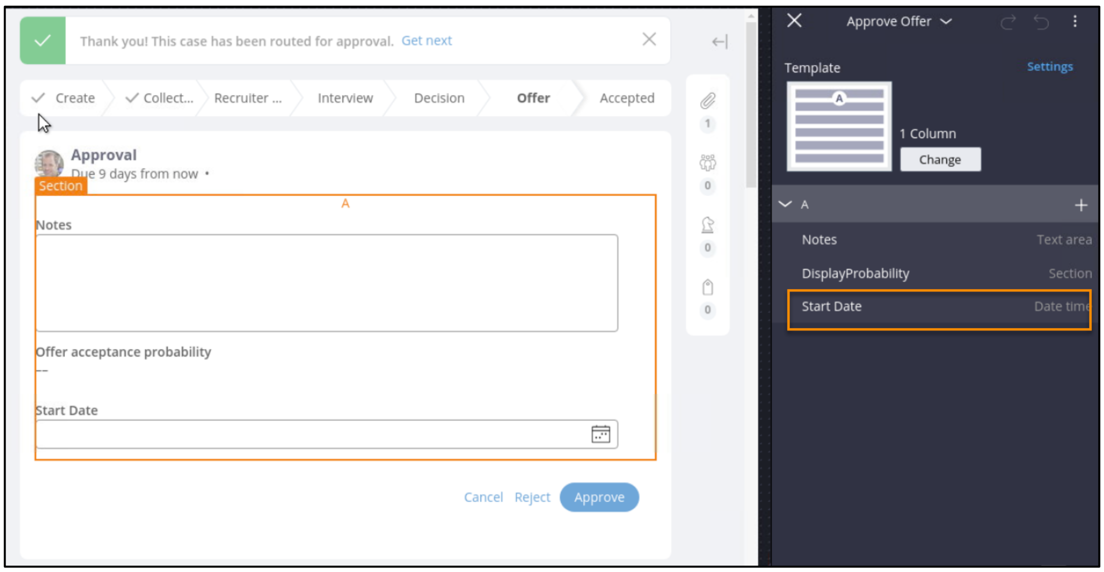
21. Scroll down in the **Add** window until you find **Start Date** in the list. Select **Start Date** and click the **+** sign to add to the view. When you have added it to the form it will have a green check box next to it confirming it has been added.



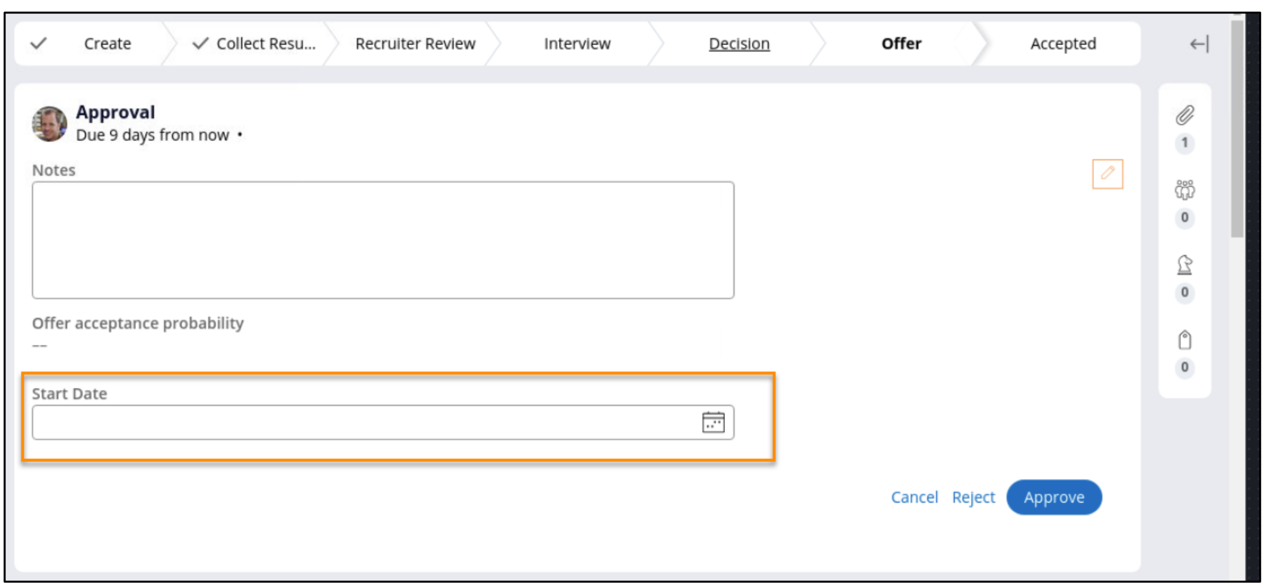
22. Close the **Add** panel by selecting the **X.**



23. You should now see **Start Date** at the bottom and on the right gray area.



24. You have now modified the user view in real-time.



25. **Log off**.

Case Life Cycle

Create the 'Career Candidate' case type

Scenario

WIND, Inc. applying best practices of design thinking, WIND's design and development team has completed the first three days/objectives of the design sprint. The team has mapped, sketched out, and decided which storyboards to prototype. The prototyping begins by defining the Case Types that will be elaborated upon.

Stakeholders have defined the following:

- Management has agreed with the Lead System Architects recommendation to build the new "Careers" application.
- In the new "Careers" Pega application, the legacy term for the person, "job applicant" will now be referred to as the "Candidate".
- The legacy term "job application" will be replaced with a new case type name, "Career Candidate" to more fully describe the transaction and the process of a candidate applying for a career position with WIND.
- Candidates interested in an open position will create and submit a Career Candidate transaction for each position they are interested in.

NOTE: Design thinking is a philosophy and approach to problem solve and innovate. It typically consists of four to five days of intense workshops: Day 1) Map; Day 2) Sketch; Day 3) Decide; Day 4) Prototype; Day 5) Test.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Citizen Developer	Cyd_Citizen@WIND.com	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Enable branch development to allow modification and creation of cases.

Task 2: Explore the current application Case Types

Observe the current case types.

Task 3: Manage case types; add a new case type

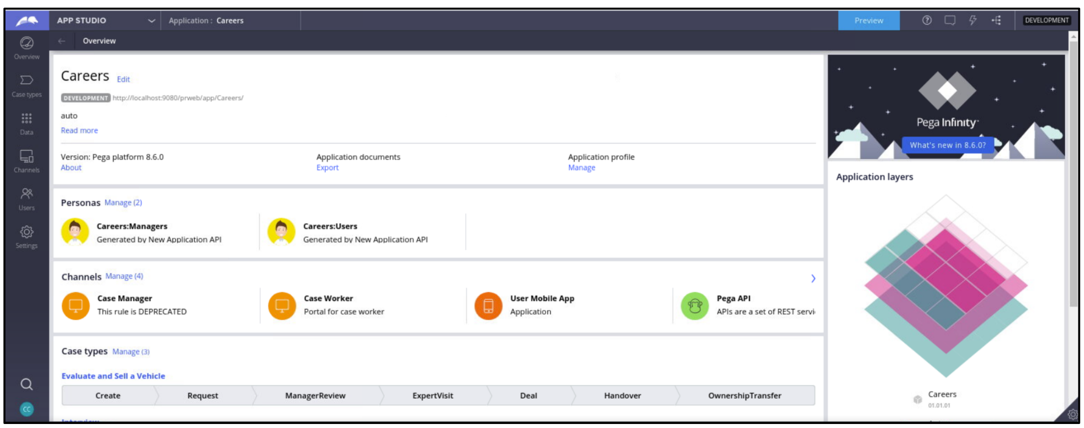
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Log in and enable Branch Development

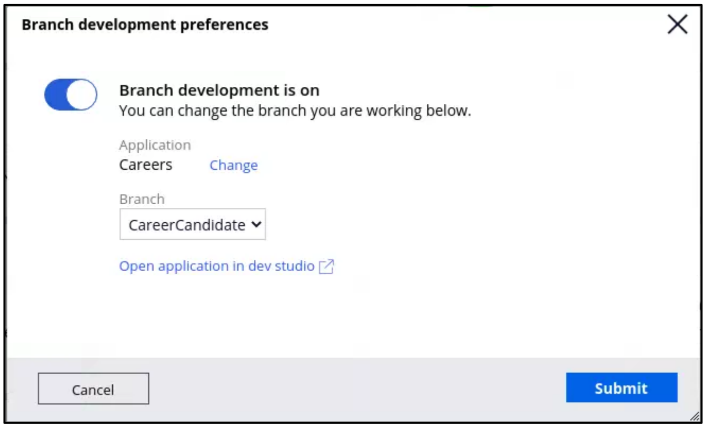
1. Log on with the User ID, **Cyd_Citizen@WIND.com**, and the password, **rules**.

The **App Studio** appears:



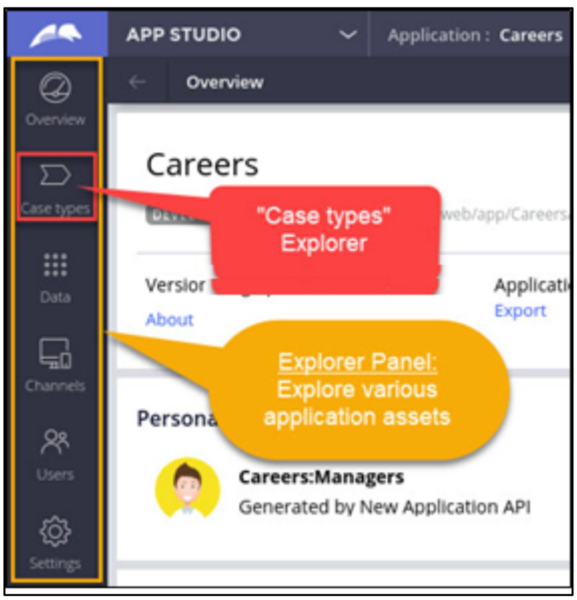
2. From the title bar click the **Toggle branch development** button.

3. Move the slider to turn branch development on. From the **Branch** dropdown ensure that **CareerCandidate** is selected and click **Submit**.



Task 2: Explore the current application Case Types

1. In the explorer panel on the left, click the **Case types** explorer:



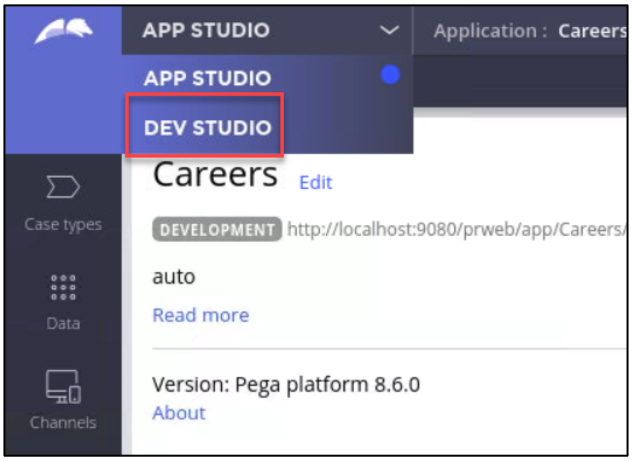
2. The **Case types** explorer expands to display the case types.

TIP: Each case type name is displayed along with its related personas and referenced data objects. The vertical ellipsis (the 3 dots) on the far right of each row allows you to delete the case type and/or the cases of that type that have been created in the development server.

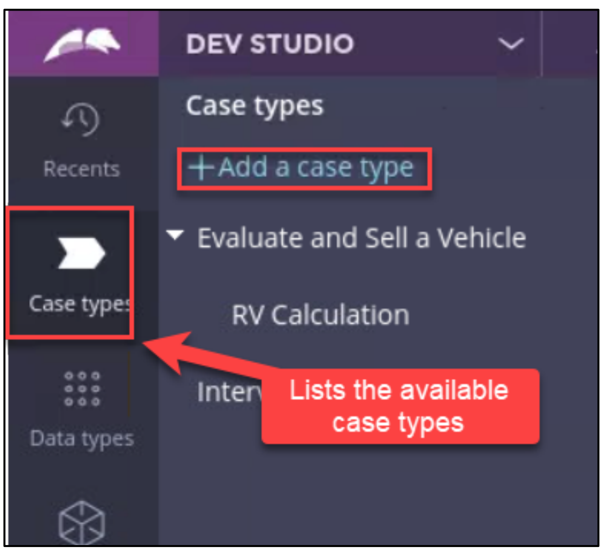
Task 3: Manage case types and add a new case type.

Dev Studio: The following instructions show how the case types can be managed in DEV Studio.

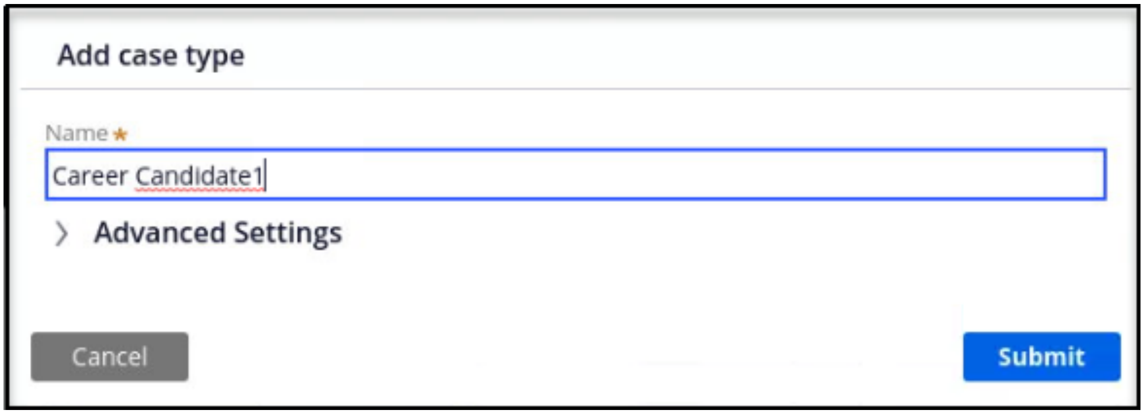
1. Switch to **Dev Studio** by selecting the option in the workspace menu.



2. Click **Case types** to view the available case types. Click on **+Add a case type** to create a new case type.



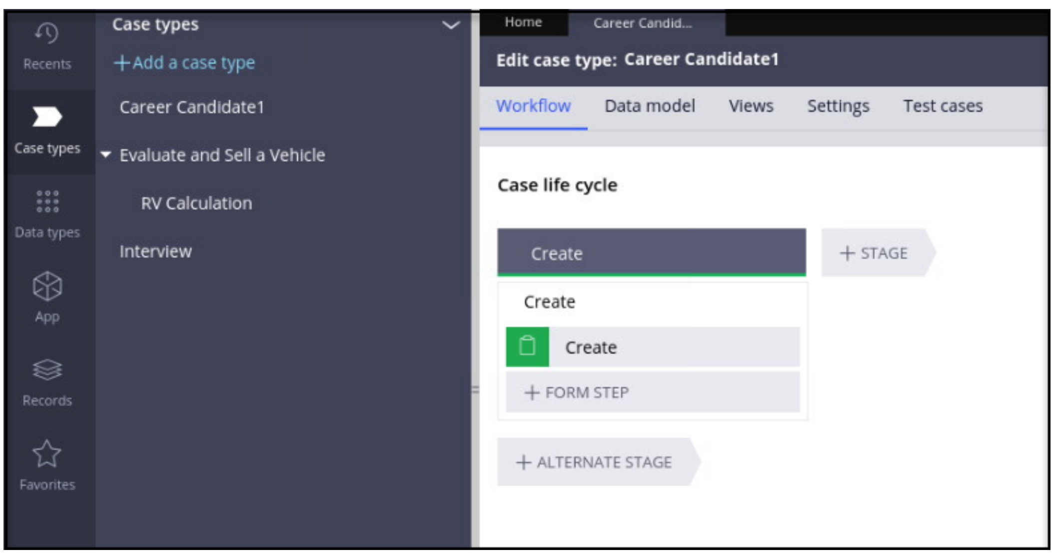
3. The **Create Case Type** modal window appears. Enter **Career Candidate1** in the case type **Name** field and click **Submit.**



4. The **Career Candidate1** case type now appears in the case designer view:

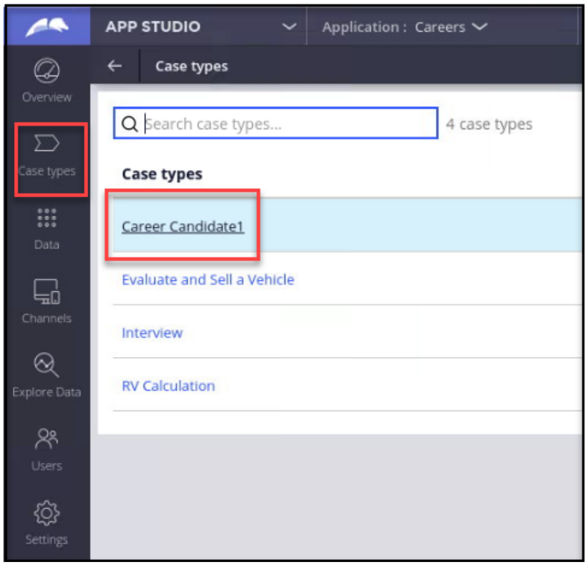
When a new case type is created, the case life cycle includes the **Create stage** by default. To speed up case creation and visualize the elements that users interact with before case processing starts, the case life cycle includes a default **Create stage** every time a new case type is created.

5. You can also confirm that the **Career Candidate1** case type has been added to your application by clicking on the **Case types** explorer.



App Studio: The following instructions show how the case types can be managed in App Studio.

1. Switch to **App Studio** by selecting the option in the workspace menu and navigate to the **Case type** explorer.
2. You can also confirm that the **Career Candidate1** case type has been added to your application by clicking on the **Case types** explorer.



3. Click the **Career Candidate1** case type. The **Career Candidate1** case type now appears in the case designer view:

When a new case type is created, the case life cycle includes the **Create stage** by default. To speed up case creation and visualize the elements that users interact with before case processing starts, the case life cycle includes a default Create stage every time a new case type is created.

4. Click on the user avatar placeholder, then click **Log off.**

Add stages to a case type

Scenario

Based on the success proposition of the CAREERS PROJECT business use case, the HR group within WIND would like to automate the current "paper based" job application process.

The current "as-is" process is described as follows:

1. Job applicant reviews a list of open positions on WIND's current corporate website.
2. Job applicant clicks on a button next to the job they are interested in.
3. A "pop-up" modal window appears which collects the following information from the applicant:
    1) Open position ID number (read only)
    2) Text fields for first name and last name
    3) Text fields to enter mailing address
    4) Text field for entering email address
    5) Text field to enter phone number
    6) Add attachment capability to upload cover letter and resume
4. Job applicant information is stored in a spreadsheet for the recruiter's daily review. Cover letters and resumes are printed and sent to HR for consideration.
5. HR redistributes documentation to hiring managers for review via interoffice mail.
6. Hiring manager contacts HR if interview is needed.
7. Hiring manager contacts applicant and schedules interview.
8. Hiring manager interviews applicant and scores the applicant. Results are sent back to HR.
9. After interviews, HR requests final decision of candidate from hiring manager.
10. HR sends offer letter to applicant.
11. Applicant accepts or rejects offer.

The current job application process is time consuming, requires too many manual tasks, and is extremely error prone. WIND has decided to take advantage of the current Pega technology to redesign the process and some terminology to make it more appealing and efficient. WIND has also decided to incorporate the new (Pega) Interview case type process that was designed in release one.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Citizen Developer	Cyd_Citizen@WIND.com	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable Branch Development

Enable branch development to allow modification and creation of cases.

Task 2: Add primary stages to the Career Candidate case type

The main stakeholder sees most career candidate cases going through 6 primary stages:

1. **Job application** (candidate submits job application)
2. **Recruiter review** (HR consultant reviews candidate's application)
3. **Interview** (incorporate new interview case lifecycle design)
4. **HR review** (HR review cannot start until interview(s) are complete; background check is completed; candidate is approved; compensation is determined; offer is sent to candidate)
5. **Offer acceptance** (candidate accepts offer)
6. **Post-acceptance** (start new employee onboarding process)

Task 3: Add alternate stages, detailed steps

Add alternate stages for withdrawing and rejecting.

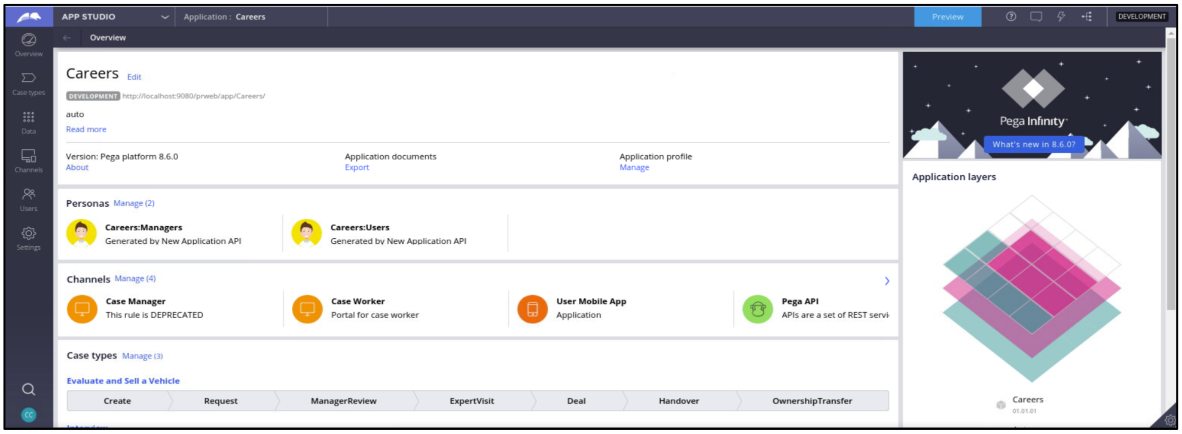
> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Log in and enable Branch Development

1. Log in with the User ID, **cyd_citizen@wind.com**, and the password, **rules**.

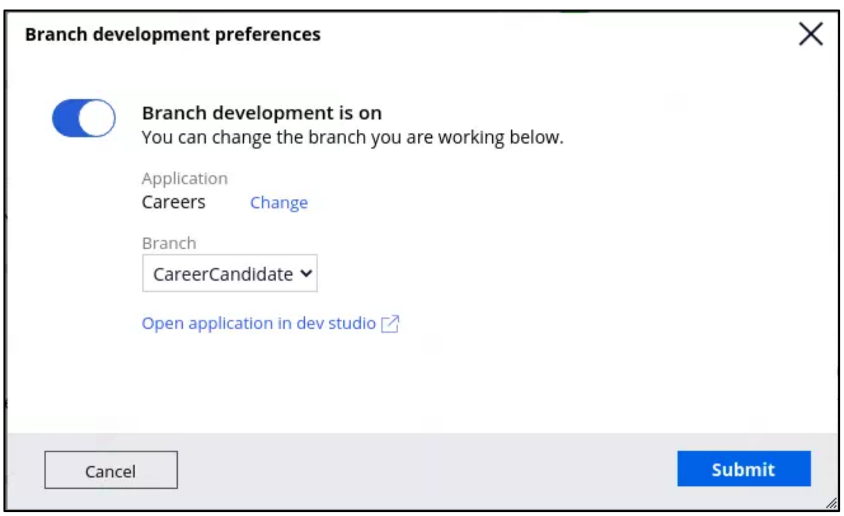
The **App Studio** appears.



2. From the title bar click the **Toggle branch development** button.

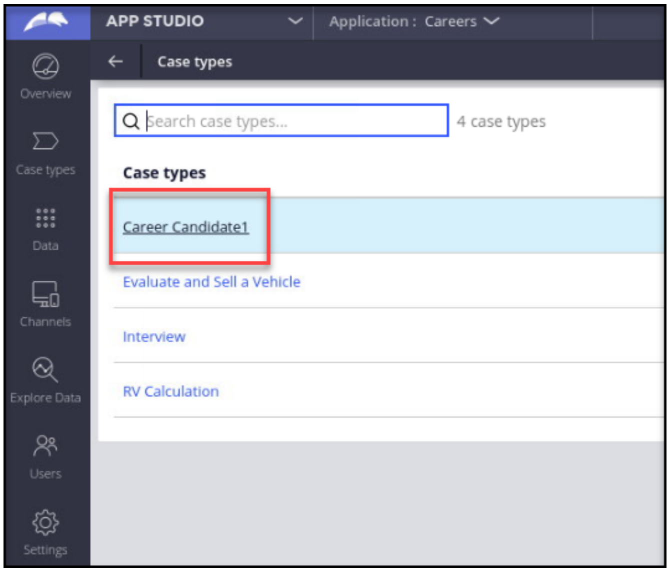
NOTE: If you have already enabled branch development in a previous lesson, confirm it is still pointing to the **CareerCandidate** branch.

3. If **Branch development** is off, move the slider to turn branch development on. From the **Branch** dropdown ensure that **CareerCandidate** is selected and click **Submit**.

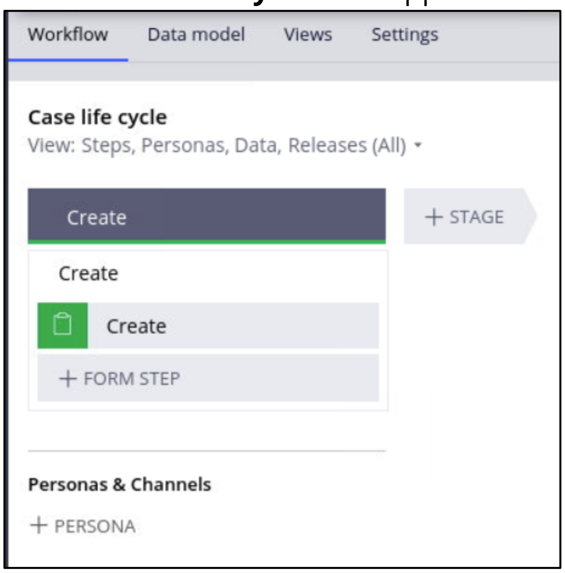


Task 2: Add primary stages to the Career Candidate case type

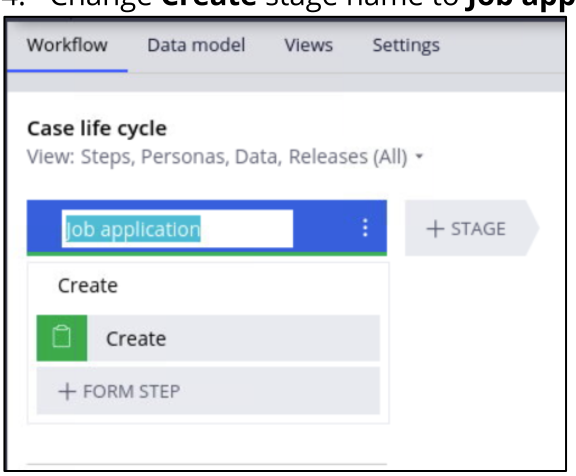
1. In **App Studio**, click the **Case types** explorer.
2. Click the **Career Candidate1** case type to display the case designer.



3. The **Case life cycle** view appears with the default stage **Create**.

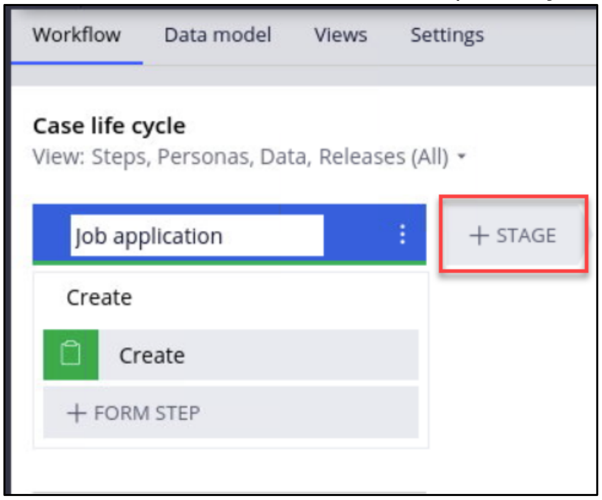


4. Change **Create** stage name to **Job application**.

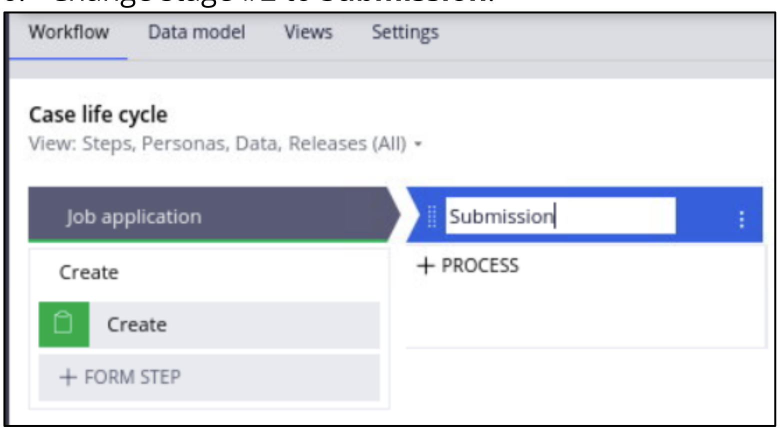


NOTE: Job application is a create stage. A primary **Create** stage will automatically move to the next stage during execution.

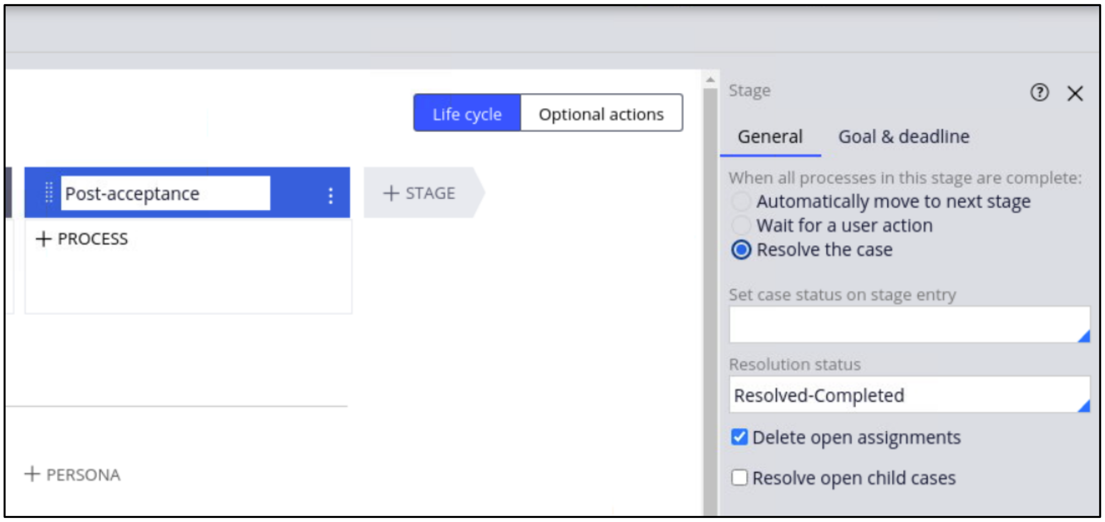
5. Click **+ STAGE** to add another primary stage:



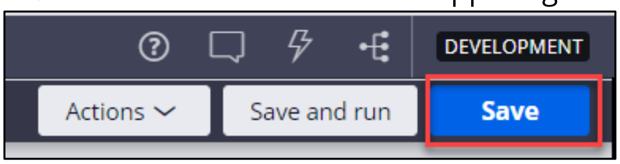
6. Change stage #2 to **Submission**.



7. Repeat steps 5 and 6 to add four more primary stages.
    a. Change primary stage #3 to **Recruiter review.**
    b. Change primary stage #4 to **Interview**.
    c. Change primary stage #5 to **HR review**.
    d. Change primary stage #6 to **Offer acceptance**.
    e. Change primary stage #7 to **Post-acceptance**.
8. Configure the **Post-Acceptance** stage to a resolution stage.
    a. Click **Post-Acceptance**.
       Notice the **Stage** properties panel opens on the right.
9. On the **General** tab, select the **Resolve the case** radio button.



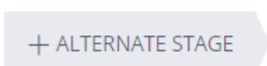
10. Click the **Save** button in the upper right of the **App Studio**.



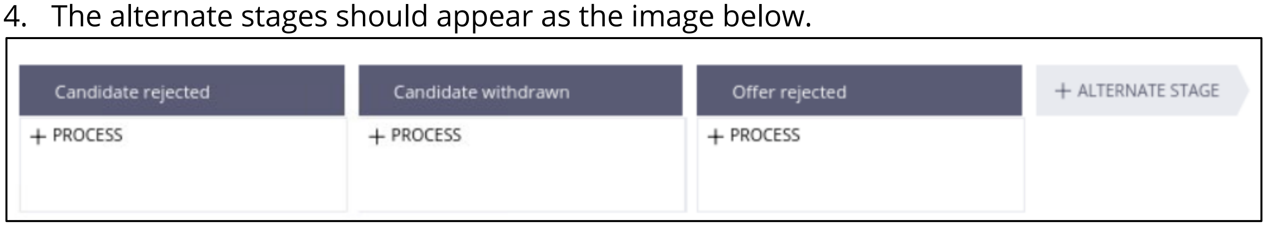
TIP: When drafting your case lifecycle, save your work often.

Task 3: Add alternate stages, detailed steps

1. Click the **+ ALTERNATE STAGE** button.

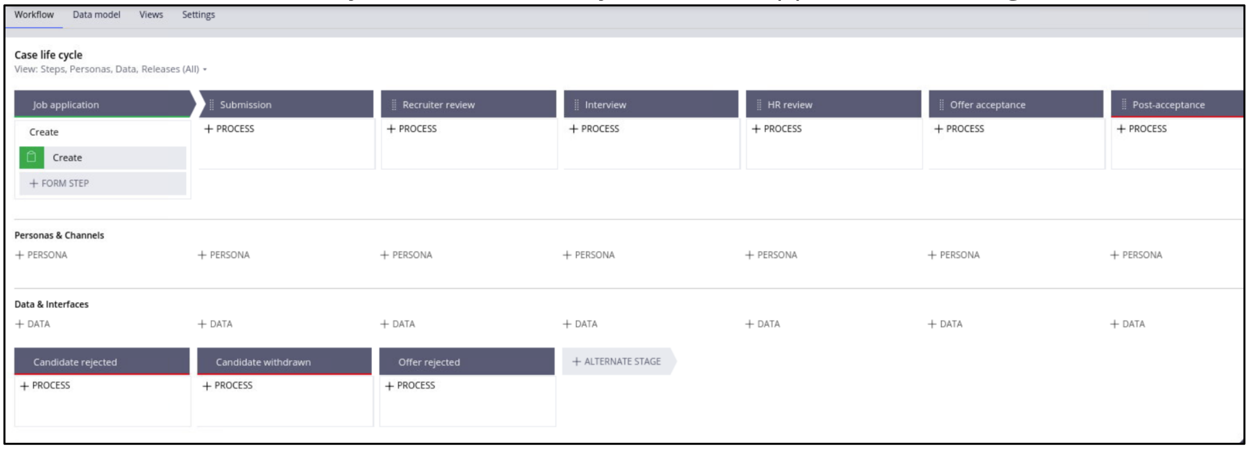


2. Label the first alternate stage, **Candidate rejected**.
3. Add two more alternate stages and label them, **Candidate withdrawn** and **Offer rejected.**
4. The alternate stages should appear as the image below.



5. Make the **Candidate rejected,** and **Candidate withdrawn** alternate stages resolution stages. (**REMINDER**: Refer to ***Task 2***, step #8 and # 9 if you need assistance.)
6. Click **Save**.
7. The alternate stages should appear as the image below. The stages with the red line indicate they are resolution stages.

8. Review the entire lifecycle. The case lifecycle should appear as the image below.



9. Click the operator avatar placeholder and select **Log off.**

Add Processes and Steps to Stages

Scenario

The stages have been added to the Career Candidate case type and approved by the product owner. Additional DCO session interviews with the HR team stakeholders reveal the processes and tasks that need to be added.

The design and development team adds appropriate processes and steps to the stages. Some steps are manual tasks to be performed by different users (personas) and some steps will be automated. We'll add Personas and Data Objects in a separate exercise.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Citizen Developer	Cyd_Citizen@WIND.com	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Turn on Branch Development
Enable branch development to allow modification and creation of cases.

Task 2: Add process tasks the Job Applicant stage
Based on feedback from the HR team, visualize the processes in greater detail by adding processes and steps to the primary stages.

Task 3: Add the process tasks to the remaining primary stages in the case
Using the table provided, add processes and steps as identified by various stakeholders.

Task 4: Execute a "play back" of the Career Candidate primary stages and steps
Ensure process steps are executed in the proper order. Save and Run the case type to "play back" the process steps with the appropriate stakeholders to ensure the process steps are executed in the proper order.

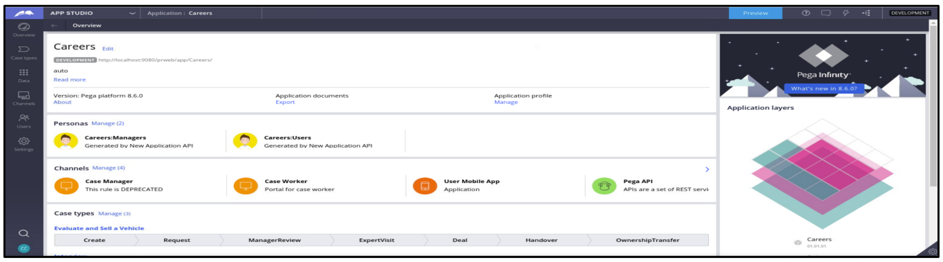
> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Enable Branch Development

1. Log on with the User ID, **Cyd_Citizen@WIND.com**, and the password, **rules**.

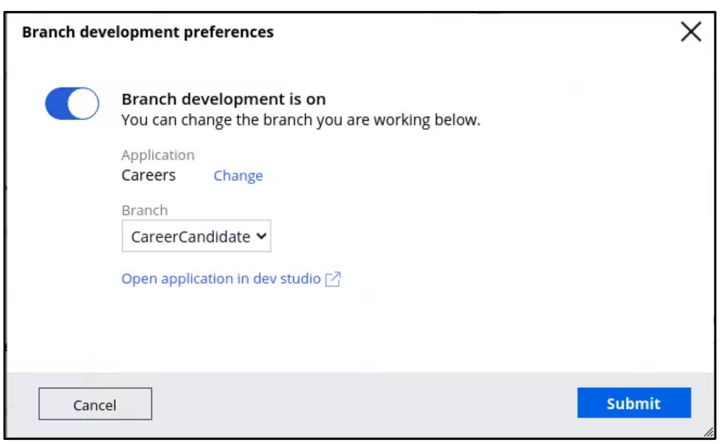
The **App Studio** appears:



2. From the title bar at the top click the **Toggle branch development** button.

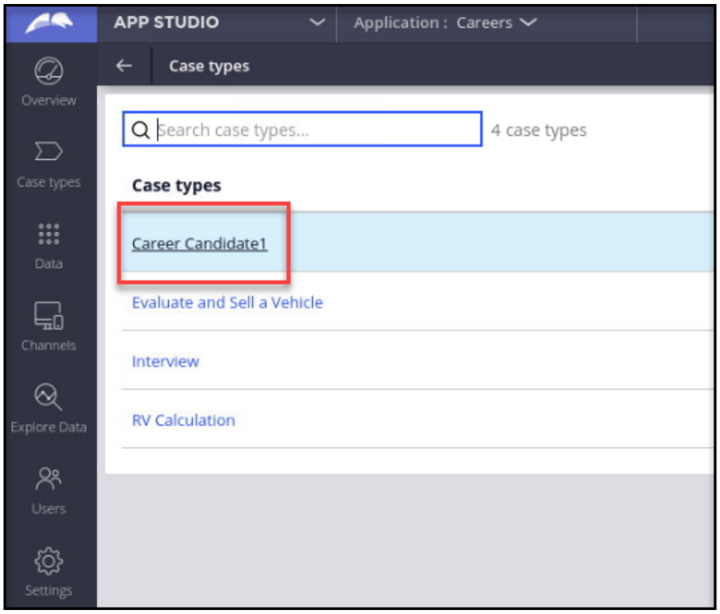
> **NOTE:** If you have already enabled branch development in a previous lesson, confirm it is still pointing to the Career Candidate branch.

3. If the branch development is off, move the slider to turn branch development on. From the **Branch** dropdown ensure that **CareerCandidate** is selected and click **Submit**.

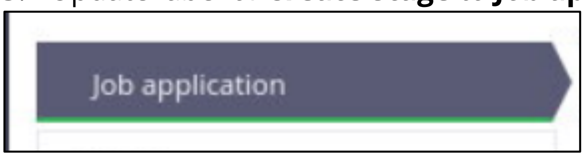


Task 2: Add processes and steps to the stages

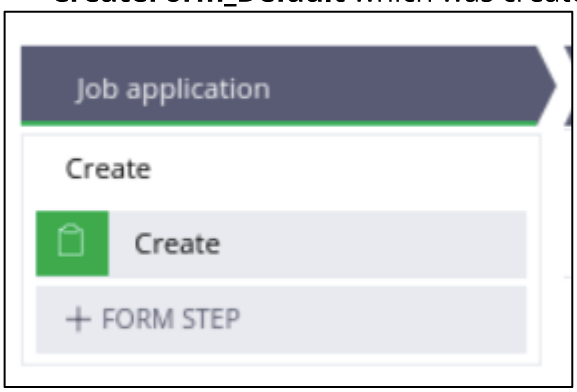
1. In the **App Studio**, click the **Case types** explorer.
2. Click the **Career Candidate1** case type to display the case designer.



3. Update label of **Create Stage** to **Job application.**

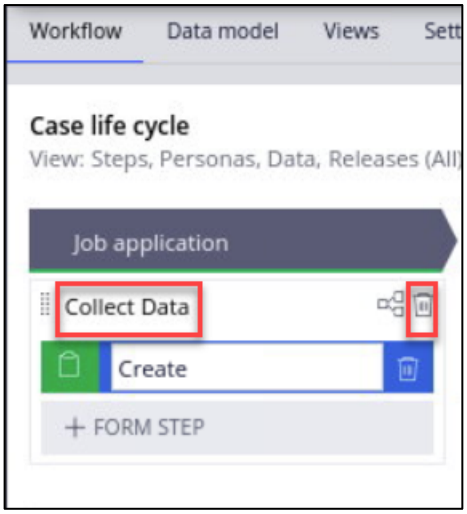


4. Between the **Job application** stage and step #1 is a white space with the label "**Create**". This is the **process label**. The label is associated with the process flow **CreateForm_Default** which was created automatically when a new case type is created.

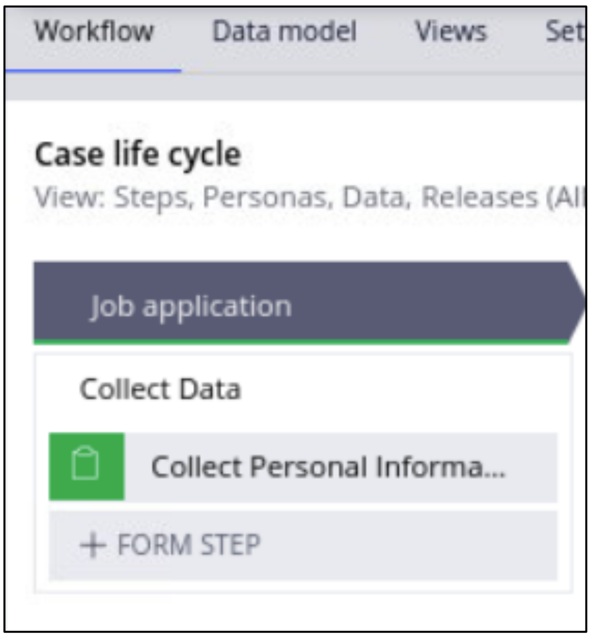


5. Rename the process label to **Collect Data.**

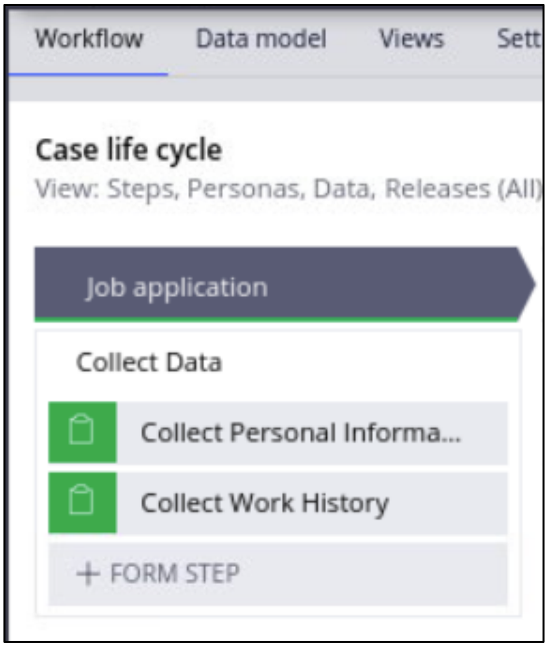
Note: The process can be deleted using a **Trash** icon beside the label and a new process can be added by adding a step or adding a process.



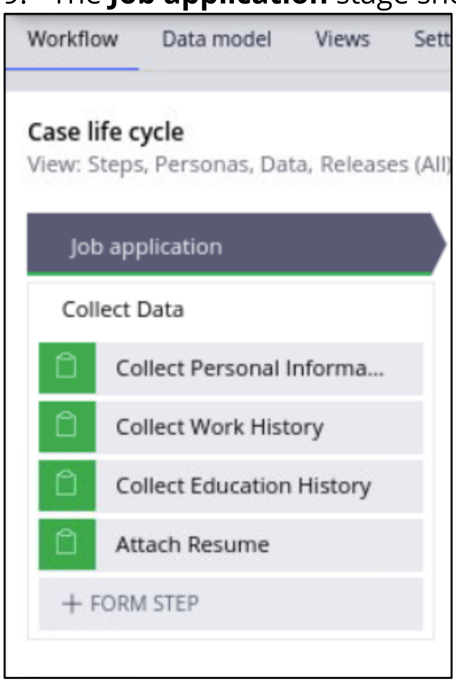
6. Rename the first step label to **Collect personal information** or delete the 1st step and add a step and label it to **Collect personal information.**



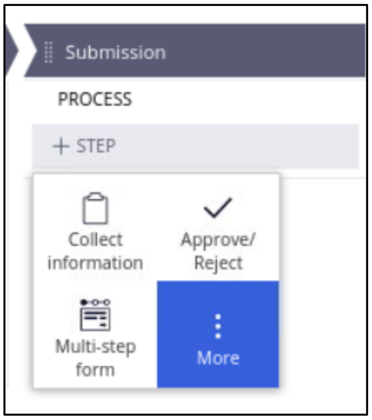
7. In the **Job Application** stage**, Click on + FORM STEP** and add the label **Collect Work History.**



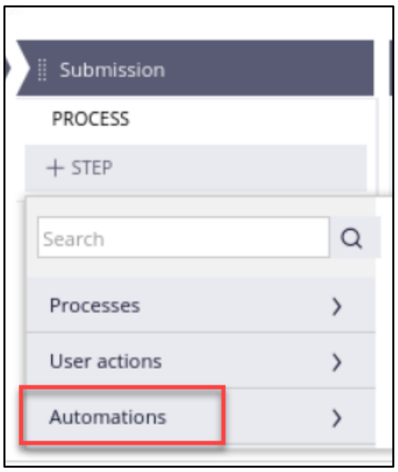
8. In the **Job Application** stage, repeat step 7 to add two more Collect Information steps. Label step 3, and 4 as follows:
    a. **Collect Education History**
    b. **Attach Resume**
9. The **Job application** stage should now appear as follows:



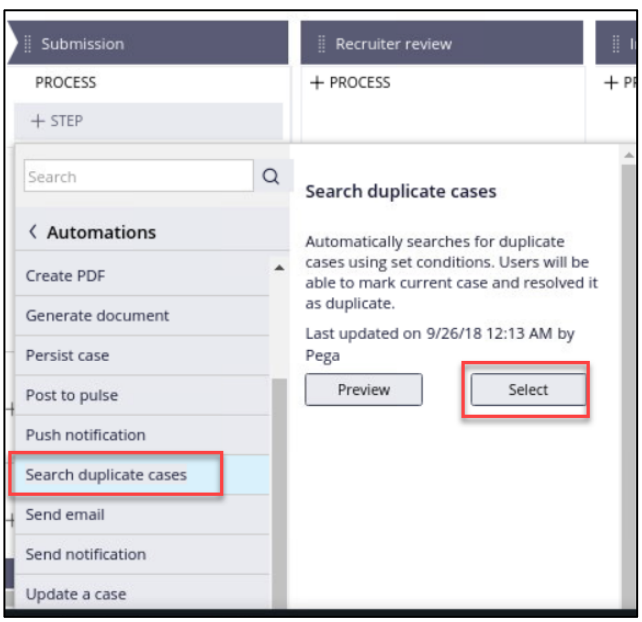
10. On the **Submission** stage, click **+ STEP** to add the first step.



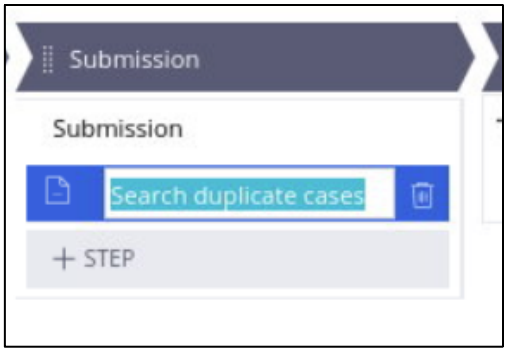
11. Select the **More** tile to view the list:



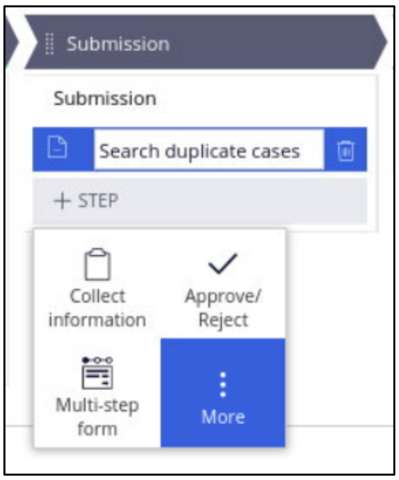
12. Select **Automations > Search duplicate cases** and click the **Select** button:



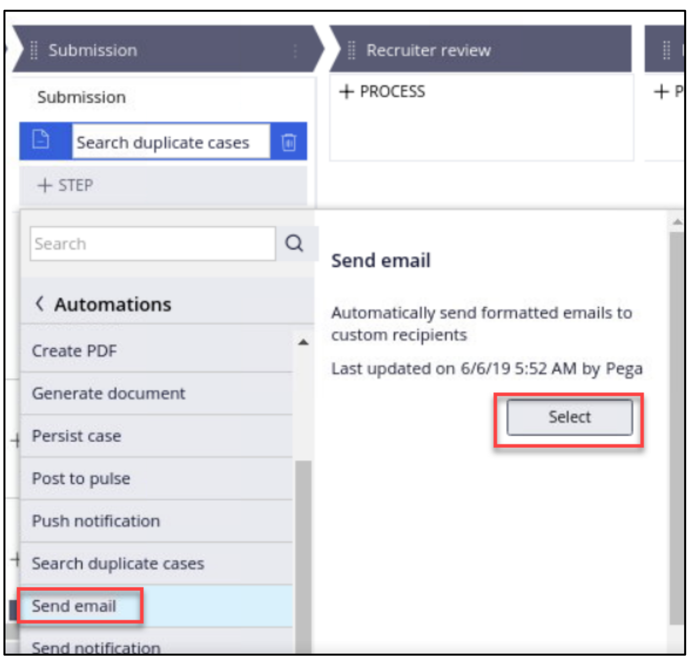
Keep the current label. We can change it later.



13. Add a second step by adding **+ STEP** in the **Submission** stage.
14. Select the **More** tile:

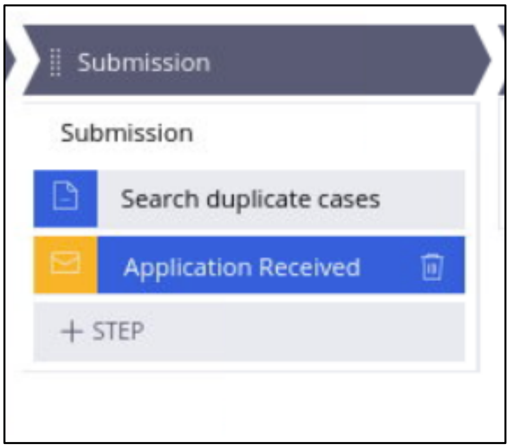


15. Select **Automations > Send email**, and click the **Select** button:



16. Change the label of the new email step to **Application Received**.

17. The **Submission** stage should now appear as follows:



Task 3: Add the process tasks to the remaining primary stages in the case.

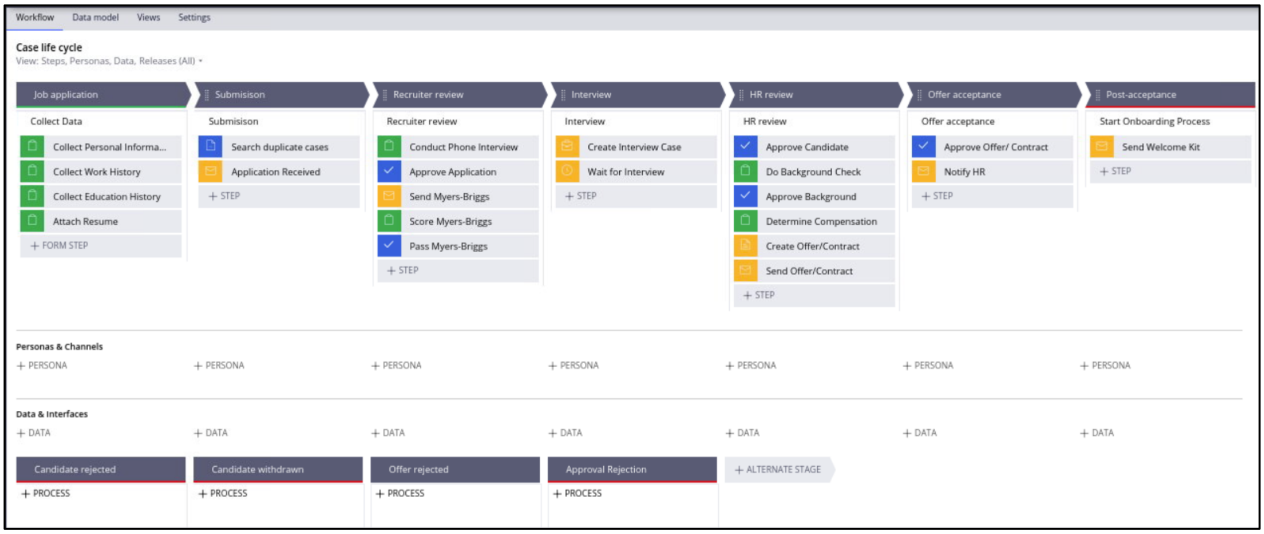
Using the following table, add processes and steps as identified by various stakeholders.

Repeat the steps in Task 2 to build out the processes and steps for the remaining stages.

Stage	Process	Step (Type)
Recruiter review	Recruiter review	• Conduct Phone Interview (Collect Info) • Approve Application (Approve) • Send Myers-Briggs (Send Email) • Score Myers-Briggs (Collect Info) • Pass Myers-Briggs (Approve)
Interview	Interview	• Create Interview case (Create Case) • Wait for Interview (Wait)
HR review	HR review	• Approve Candidate (Approve) • Do Background Check (Collect Info) • Approve Background (Approve) • Determine Compensation (Collect Info) • Create Offer/Contract (Generate Document) • Send Offer/Contract (Send Email)
Offer acceptance	Offer acceptance	• Accept Offer/Contract (Approve) • Notify HR (Send Email)

Stage	Process	Step (Type)
Post-acceptance	Start Onboarding Process	• Send Welcome Kit (Send Email)

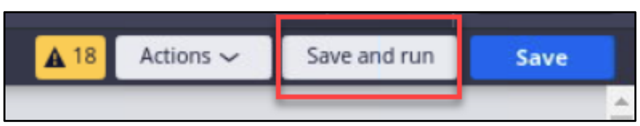
When completed, the case will look like the following image:



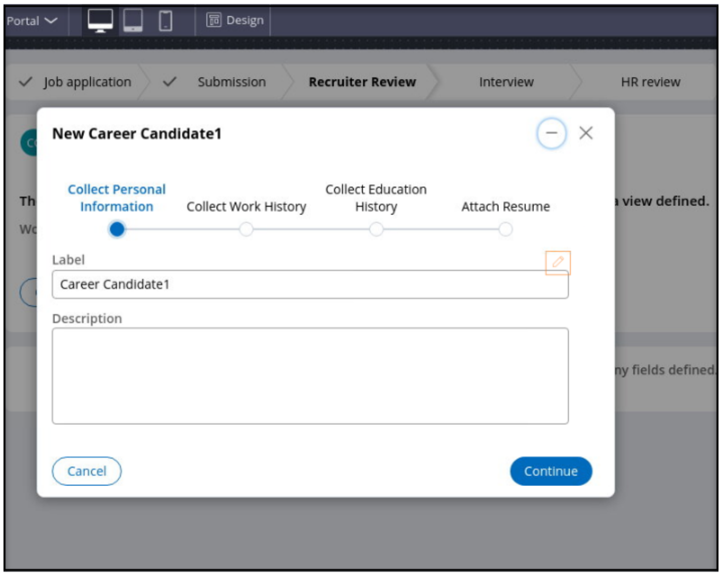
Click **Save.**

Task 4: Execute a "play back" of the Career Candidate primary stages and steps:

1. Test the primary steps to make sure they are in the correct order. In the upper-right of the case designer, click the **Save and run** button:



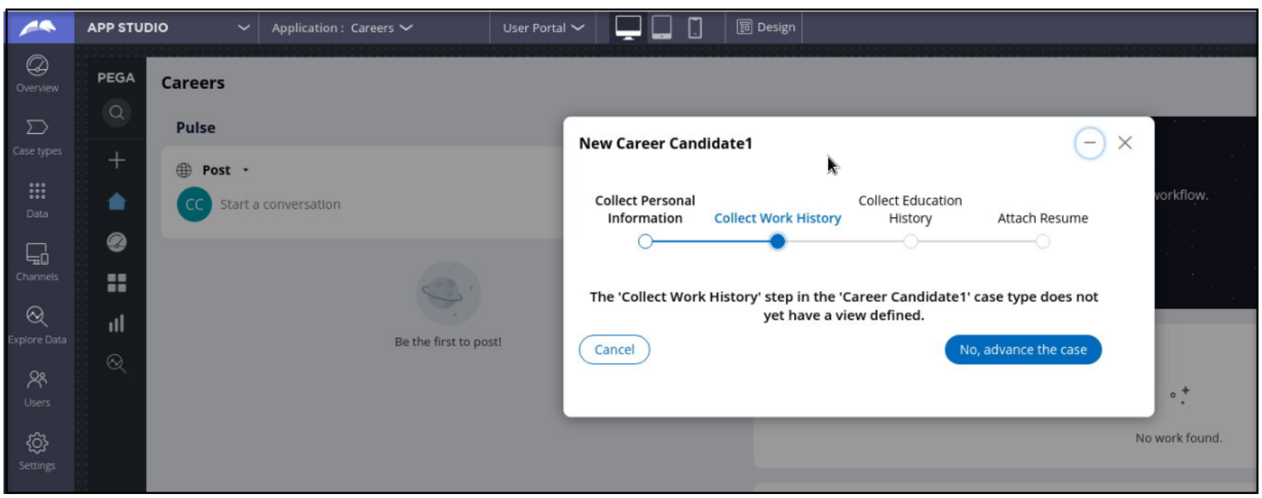
2. The **Job Application** stage, **Collect personal info** step, user view placeholder appears:



3. Click **Continue.**

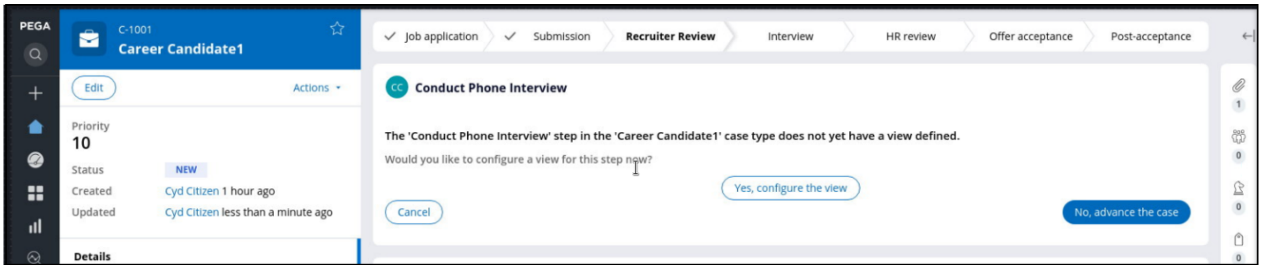
IMPORTANT: We'll learn how to configure user views in a future lesson. For now, we're just running the process with our stakeholders to make sure the process steps are in the proper order.

4. The **Collect Work History** step appears next:



5. Click **No, advance the case** to move to the **Collect Education History** step.
6. Click **No, advance the case** to move to the **Attach Resume** step.
7. Click **No, advance the case** to move to the **Recruiter Review** stage, **Conduct Phone Interview** step.

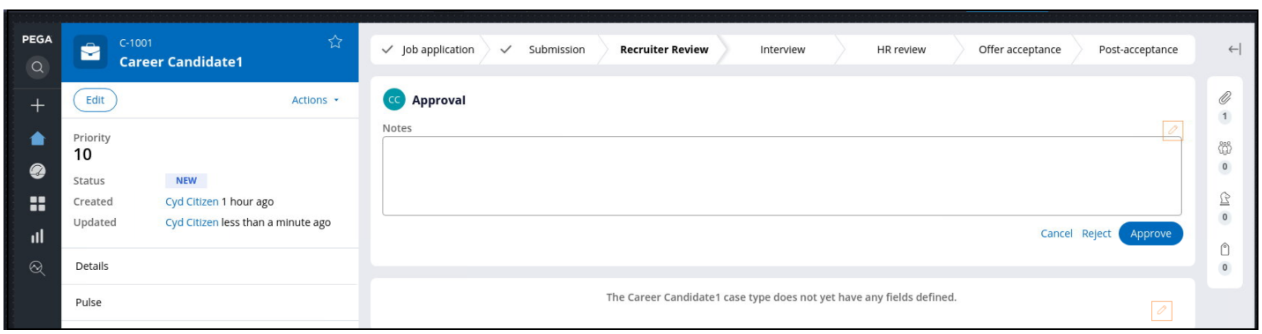
Note: Clicking on any stage name shows the completed steps with a green check mark in a green circle as shown below.



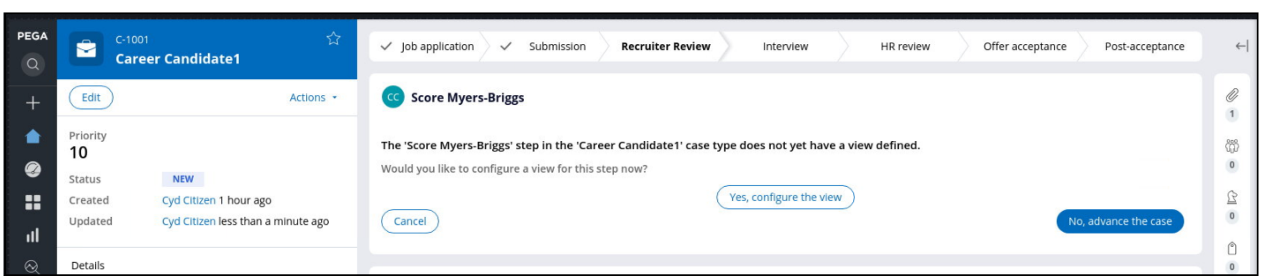
8. Click **No, advance the case** to move to the **Approval** step.

> **Note:** This standard user view appears because we added the **Approve/Reject** step to the **Recruiter Review** stage.

9. Click the **Approve** button to advance to the **Score Myers-Briggs** step.

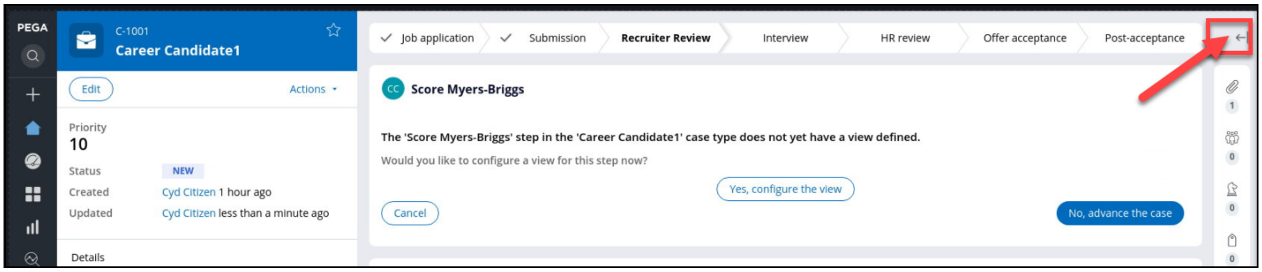


10. The following screen is displayed.



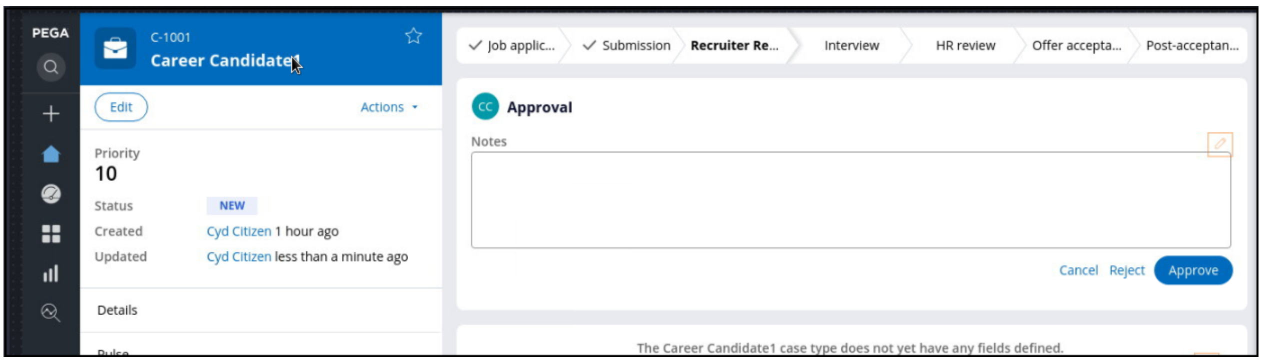
11. Click on **Expand utility panel** icon to see the files/documents. View the emails.

Then click the **Go** button.

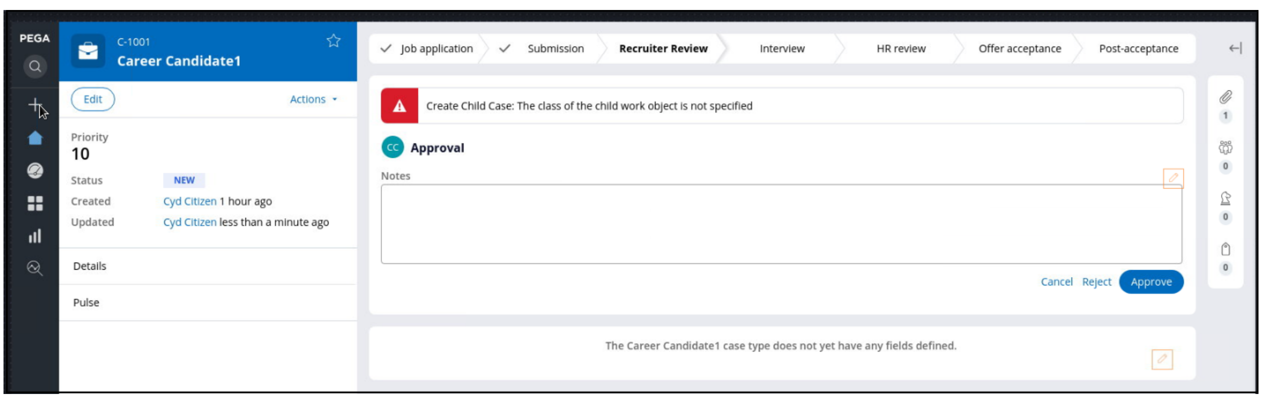


NOTE: The utility panel on the right side now indicates two emails have been registered. This is because of the two Send email automation steps that we passed along the way. We'll discuss how to create the email correspondence in a later lesson. If two emails are not displayed, click Actions > Refresh (Actions drop down is on the left hand side of the screen).

12. Click **No, advance the case** to move to the next **Pass Myers-Briggs** step.
13. On the Approval screen, click the **Approve** button.



The case won't advance further. An error message is displayed as shown below.

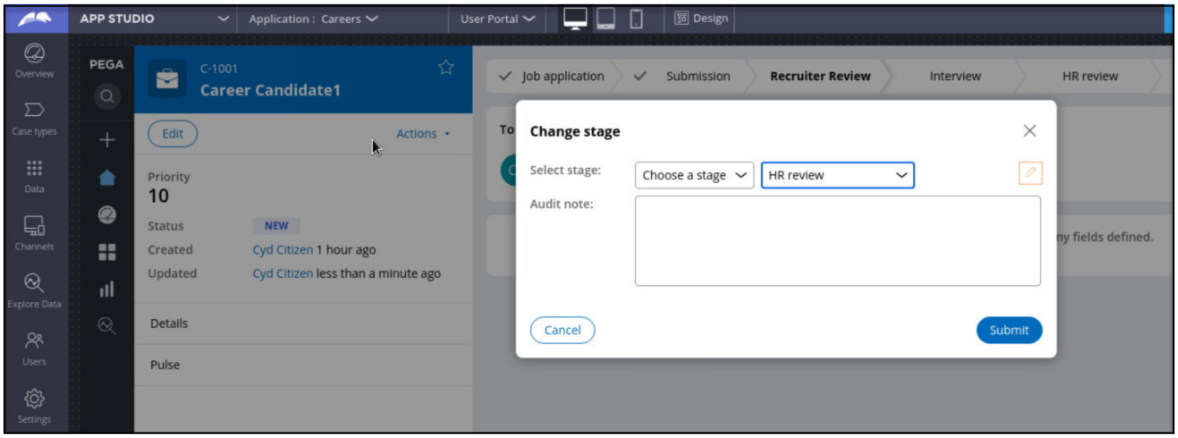


CAUTION: The Approval step won't advance the case due to the creation of the child case which hasn't been configured yet. You are asking the system to create an undefined case.

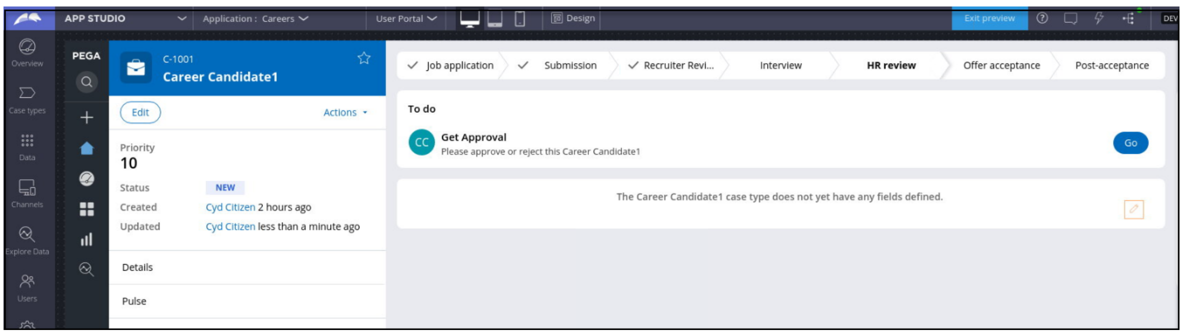
The Interview Stage (create case and wait shape) has not been implemented yet.

We will Change Stage to the HR review and continue verification of the remaining stages.

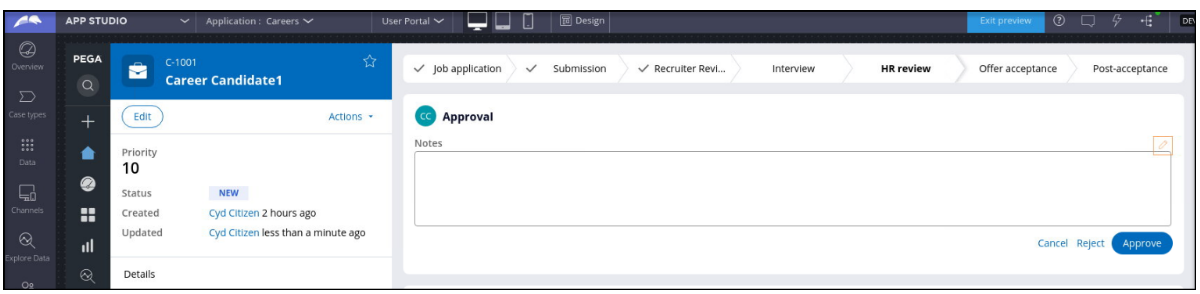
14. Click **Actions > Change Stage**. Select **Choose a stage > HR review** and click **Submit**.



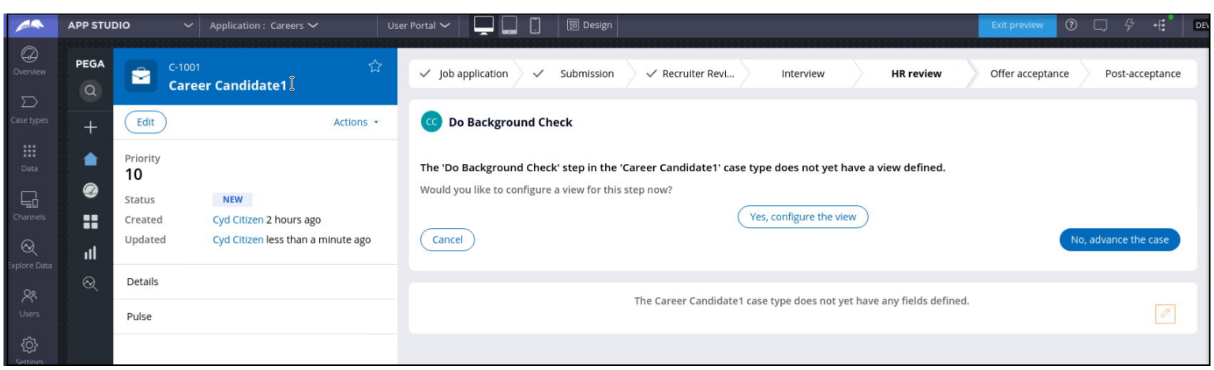
15. Click the **Go** button.



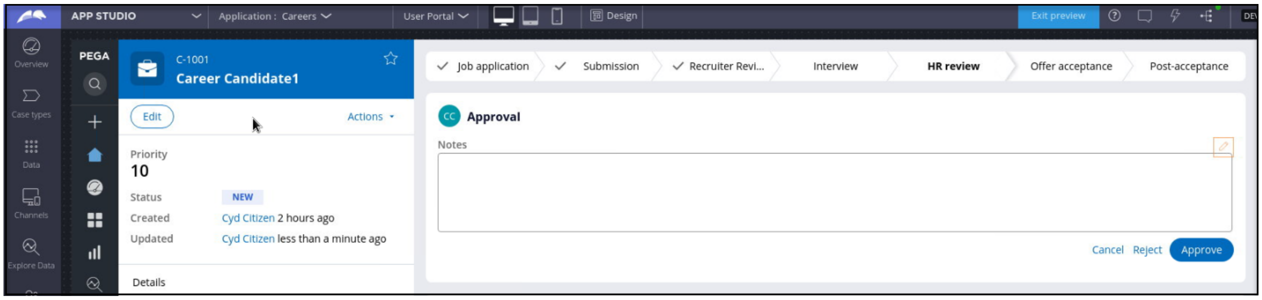
16. The first **Approval** view in the **HR Review** stage appears. Click **Approve** to continue.



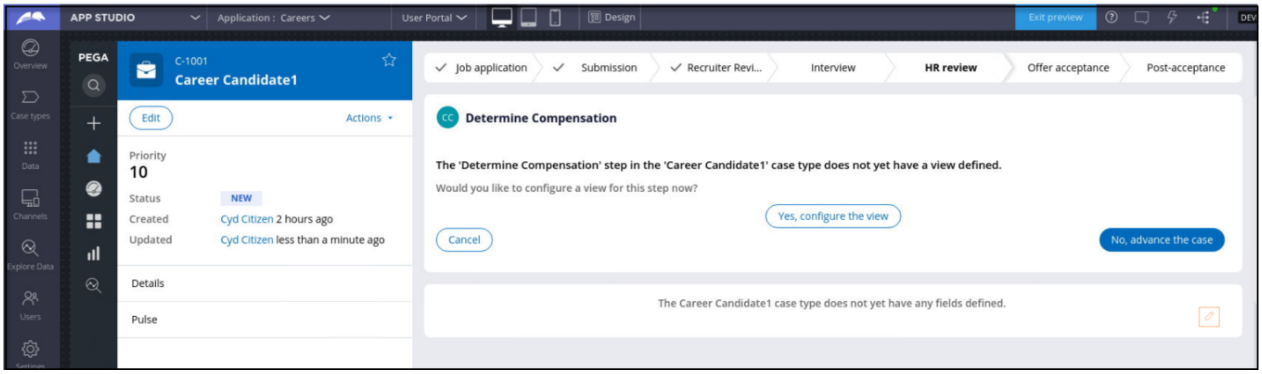
17. The **Do Background Check** step appears. Click **No, advance the case** to continue.



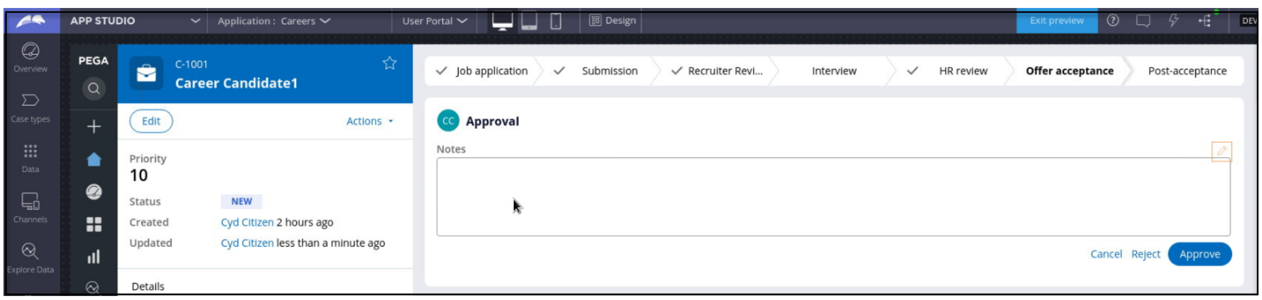
18. The second **Approval** view in the **HR Review** stage appears. Click **Approve** to continue.



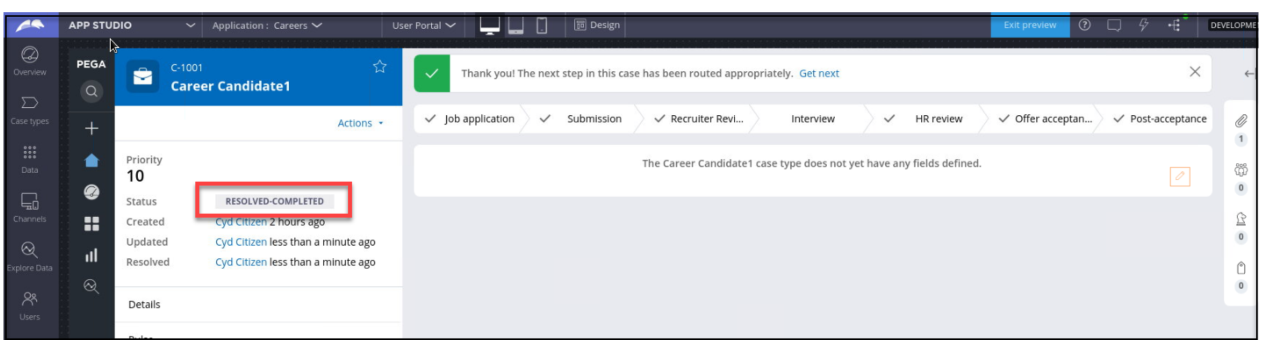
19. The **Determine Compensation** step appears. Click **No, advance the case** to continue.



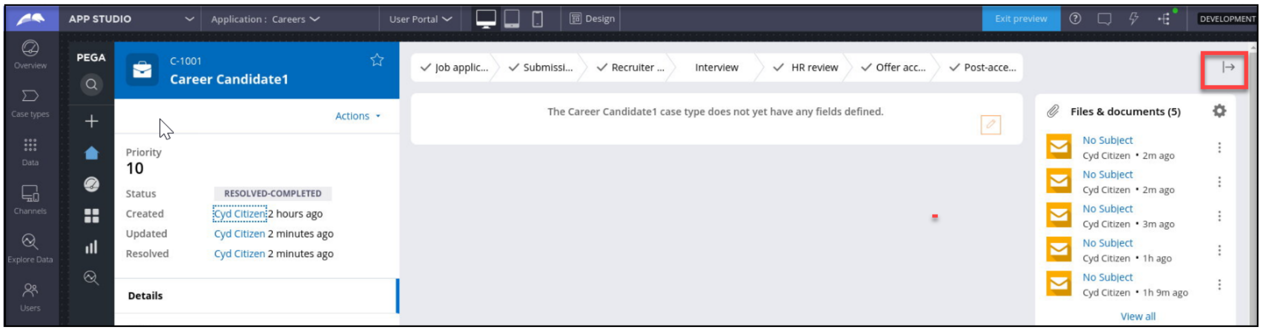
20. The **Approval** view in the **Offer Acceptance** stage appears. Click **Approve** to continue.



21. You have arrived at the **Post-acceptance** stage, the final stage of the **Career Candidate** process. Because no human task steps are in this stage, there is no user view to show. Note the case status is now **Resolved-Completed**.



22. Click on **Expand utility pane** icon on the right-hand side to view the **Files & documents** It shows the 5 emails triggered.


APP STUDIO
Application : Careers
User Portal
Design
Exit preview
DEVELOPMENT
Overview
Case types
Data
Channels
Explore Data
Users
PEGA
C-1001
Career Candidate1
Actions
Priority
10
Status
RESOLVED-COMPLETED
Created
Cyd Citizen 2 hours ago
Updated
Cyd Citizen 2 minutes ago
Resolved
Cyd Citizen 2 minutes ago
Details
Job applic...
Submissi...
Recruiter ...
Interview
HR review
Offer acc...
Post-acce...
The Career Candidate1 case type does not yet have any fields defined.
Files & documents (5)
No Subject
Cyd Citizen • 2m ago
No Subject
Cyd Citizen • 2m ago
No Subject
Cyd Citizen • 3m ago
No Subject
Cyd Citizen • 1h ago
No Subject
Cyd Citizen • 1h 9m ago
View all

23. **Log Off.**

Business Requirements

Read CAREERS PROJECT Business Use Case

Scenario

Wind Inc. (referred to in this document as WIND) is a rapidly growing vehicle procurement firm that specializes in buying/selling used vehicles from/to individual customers.

WIND has been successful at implementing automated solutions with Pega in their vehicle listing and sales divisions. More recently, WIND has begun to use Pega to automate their human resources job posting and employee recruitment processes. WIND refers to this project as the "CAREERS PROJECT".

NOTE: No exercise system is needed for this learning lab.

Your assignment consists of the following tasks:

Task 1: Read the CAREERS PROJECT Business Use Case document

Become familiar with the basic understanding and intent of CAREERS PROJECT objectives.

BUSINESS USE CASE – CAREERS PROJECT

SUCCESS PROPOSITION:

The CAREERS PROJECT completion is expected 360 days from the original conception date. To meet this goal, the CAREERS PROJECT has been broken down into 4 releases:

Release #1: Automated Interview Process: the creation, scheduling, conducting, and scoring of the interview process to find qualified applicants. **[DONE]**

NOTE: *Release #1, the automated interview process has recently gone into production. Now, WIND is turning their efforts to Release #2 - the automation of the job applicant process.*

Release #2: Automate the currently paper-based job applicant process. Create ability to apply for career opportunities online via web channel. This release is scheduled to "go-live" 90 days after design inception. **[CURRENT]**

Release #3: Automate the onboarding process for new employees. This release is expected to "go-live" 90 days after design inception. **[FUTURE]**

Release #4: Extend the automated job application process by allowing job applications to be submitted via social media channels, beginning with Facebook. This release is expected to "go-live" 90 days after design inception. **[FUTURE]**

SCENARIO:

WIND believes that skilled job applicants today have become more and more agile, creating a workforce with new rules. Job applicants today often don't stay at the same company for their entire career; they want to move up and on. They value flexibility, quick-win success, freedom to change and opportunities to grow their career.

WIND sees the need to be more agile and thus must embrace today's modern ways of recruiting talent. It's time to move away from many of the old legacy systems and paper-based processes, to new automated solutions that will allow WIND to adapt to ever changing business environments and new technologies. WIND has chosen Pega as their solution platform of choice.

WIND has decided to call this project The Careers Project.

ASSUMPTIONS:

DONE: Release 1, the Interview case type and process has already been completed.

CURRENT: Release 2, we are now engaged in the design sprint, gathering high-level requirements.

FUTURE: Release 3 and 4 are sequential releases.

NORMAL COURSE OF EVENTS - OUTCOMES

1. WIND's HR department posts new career opportunities online in the job posting database.
2. A prospective job candidate reviews available career opportunities on the existing WIND job opportunities website.
3. The prospect completes and submits an online "Career Candidate" application form.
4. The system will search for duplicate submissions from the same applicant for the position selected.
5. The system notifies the candidate their application has been received.
6. The recruiter vets the candidate's application and approves.
7. The recruiter calls the candidate and conducts a phone interview.
8. The recruiter issues the Myers-Briggs personality test.
9. The interview case is created and resolved (using release 1 outcome).
10. HR department reviews the interview results and approves the candidate for selection.
11. A background check is performed.
12. Compensation is determined.
13. Job offer is created and sent via email with DocuSign.
14. The candidate accepts the offer via DocuSign.
15. Terms of contract are approved by HR.
16. Contract is sent by HR.
17. Contract is signed by applicant via DocuSIgn.
18. Onboarding begins.

ALTERNATE EVENTS - OUTCOMES

4.
    a. Duplicate found. The new application is rejected. The job application is rejected. The recruitment process ends, and the candidate is notified.

6.
    a. The candidate is rejected. The recruitment process ends, and the candidate is notified.

10.
    a. The candidate is rejected. The recruitment process ends, and the candidate is notified.

11.
    a. The candidate is rejected. The recruitment process ends, and the candidate is notified.

14.
    a. The candidate counters the offer and sends reply email back to HR team.
        i. If appropriate, the offer is adjusted, and adjusted offer is sent to the candidate.
        ii. The counter offer is rejected. The offer is rescinded. The recruitment process for this candidate ends and the candidate is notified.

CASE WIDE ALTERNATE EVENTS - OUTCOMES: The candidate may withdraw their candidacy at any time during the recruitment process. The recruitment process ends, and all parties are notified.

Branch Development

Scenario

You want to create a section in a branch to merge it to the main application. Then you will create two new branches one for each user story and switch between them for implementation.

- User Story 1: As a user, I have to provide my email address to receive communication
- User Story 2: As a user, I have to provide some details about the vehicle such as the make, model, and color.

Use the following credentials to log in to the exercise system:

Role	Username	Password
System Architect	admin@BranchDev	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and add a field to a view in the current branch using Dev Studio

Add the existing field "Phone" to the view "Customer Details". You will have to select the Auto application context to merge to the Auto application, not the Lab application.

Task 2: Merge the branch

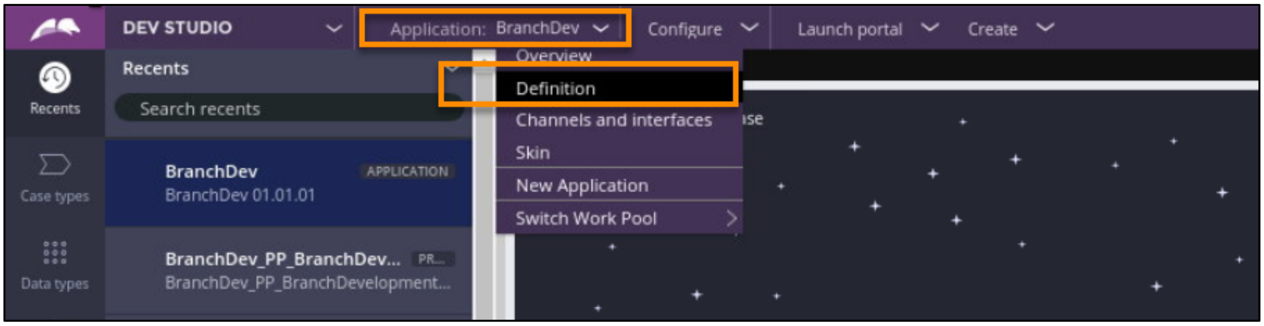
Merge the branch and verify the result.

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Log in and add a field to a view in the current branch using Dev Studio

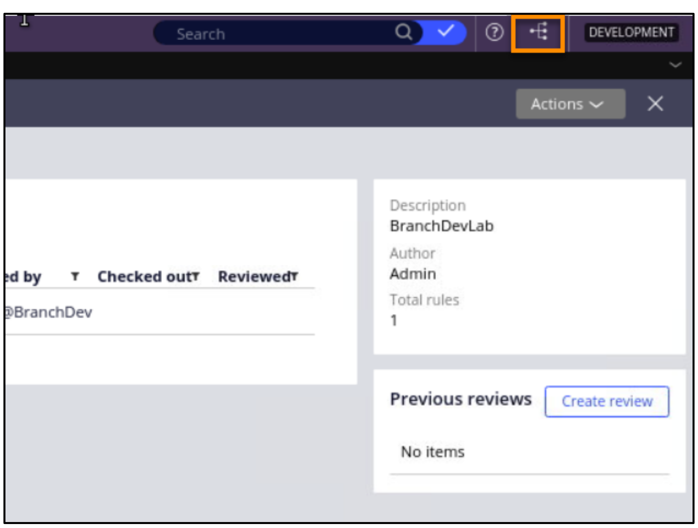
1. Log in using the credentials **admin@BranchDev** and **rules**.
2. Check the content of the current branch:
    a. Click on the **Application** menu located at the top of the screen.
    b. Select **Definition.**



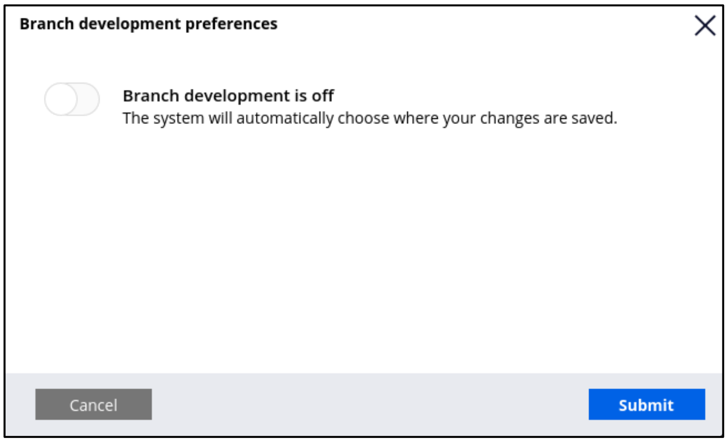
c. From the right-hand side, click **BanchDevLab** branch to open the branch.

d. Check the rules that are part of the current branch and their respective ruleset. The Total number of rules is 1.

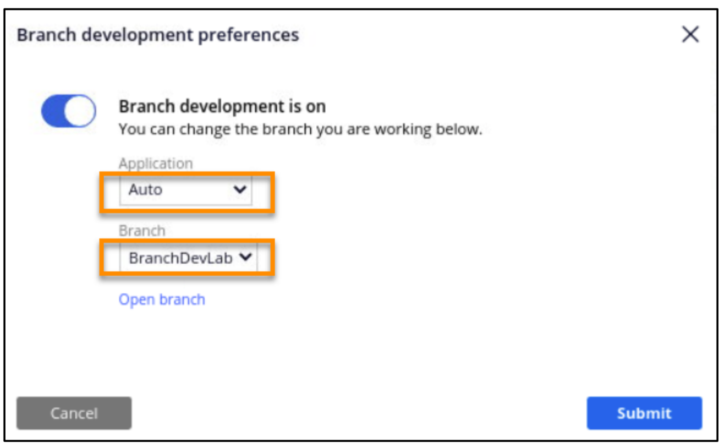
3. From the title bar click the Toggle branch development button to open the **Branch development preferences.**



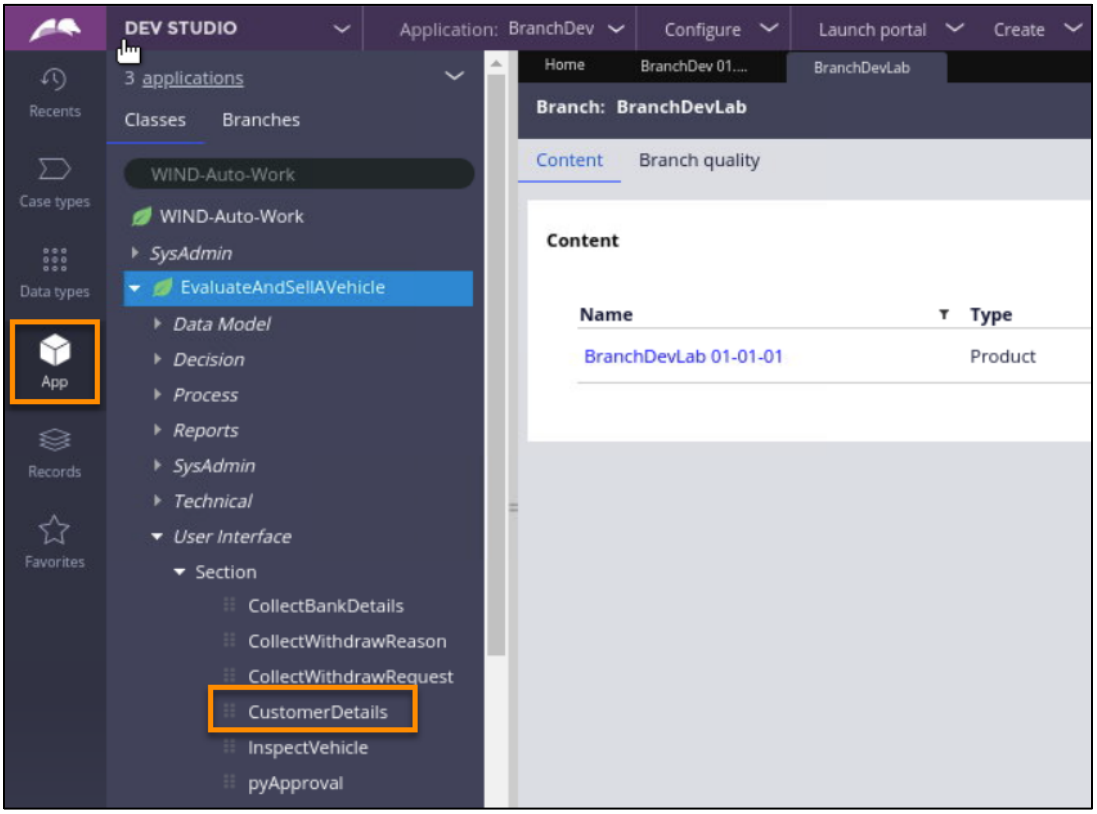
4. The following appears:



5. Move the slider to turn branch development on.
6. From the **Application** dropdown ensure that **Auto** is selected.
7. From the **Branch** dropdown ensure that **BranchDevLab** is selected and click **Submit**.

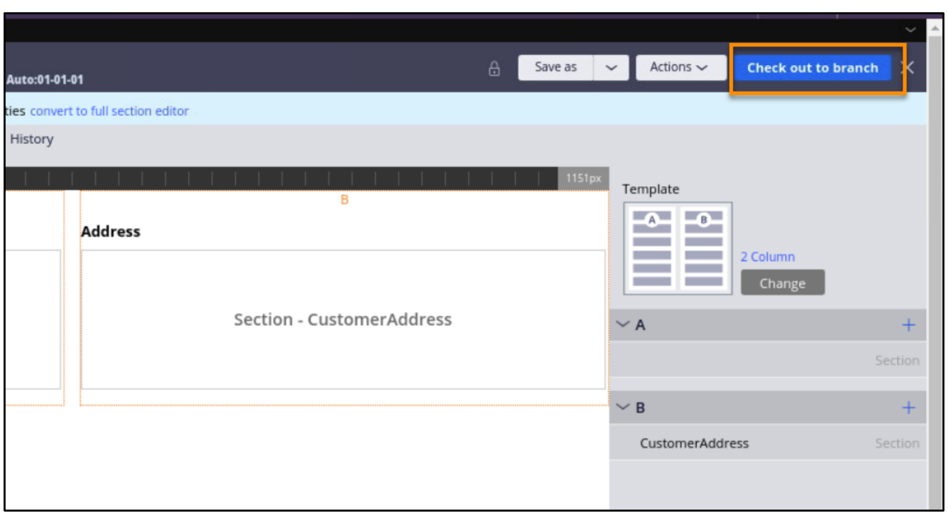


8. Open the Section related to the CustomerDetails step in the workflow.
    a. In the Dev Studio navigation pane, Click **App** to display the AppExplorer.
    b. Expand the class **EvaluateAndSellAVehicle.**
    c. Expand **User Interface.**
    d. Expand **Section.**
    e. Click on **CustomerDetails.**

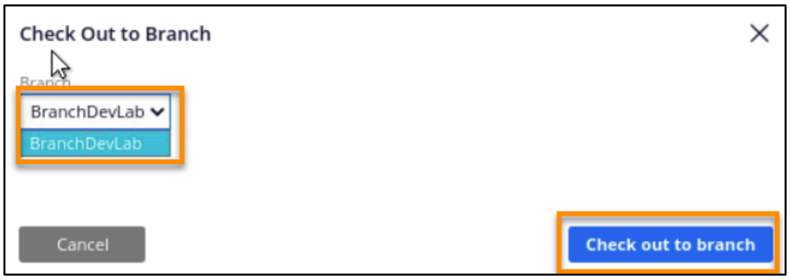


9. Note the section is locked and is part of the ruleset **Auto:01-01-01**. Since the ruleset is locked there is no way you can modify it straight away. You have to check it out to a branch, i.e., to the branch you have selected a few steps ago.

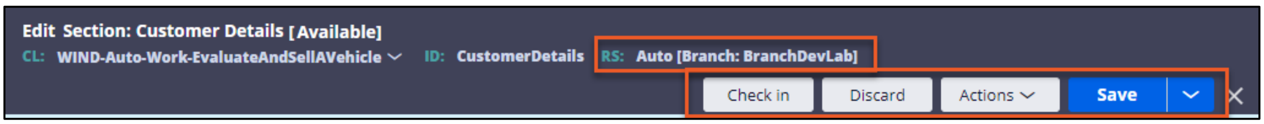
10. Click on the **Check out to branch** button. There is only one branch on the BranchDev application so use it.



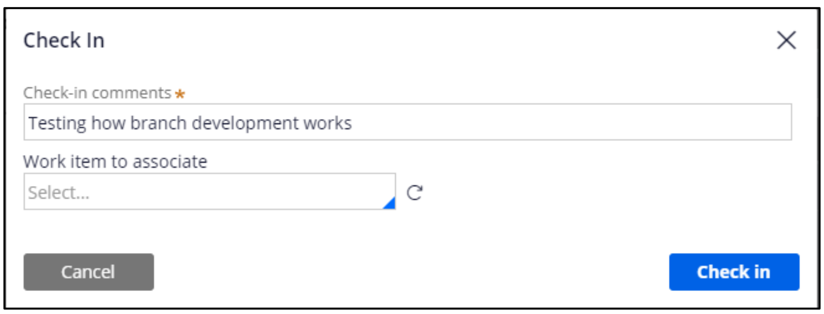
11. Click **Check out to branch**



12. Note the section is not locked anymore and the ruleset is **Auto [Branch: BranchDevLab].**

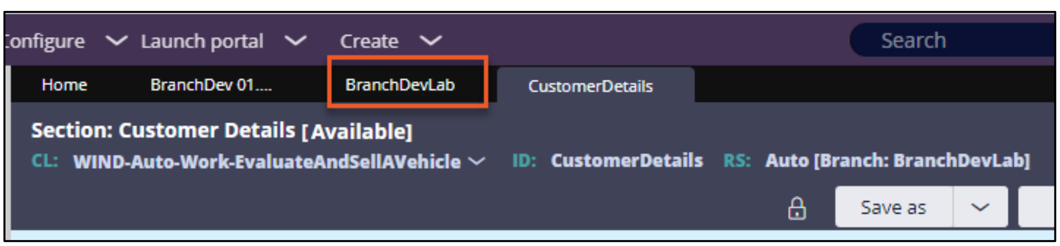


13. Click **Check in** to check in the rule into the branch ruleset to be able to merge later. Enter check in comments and check in the rule. "**Testing how branch development works**"

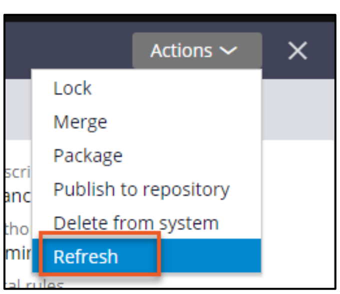


Task 2: Merge the branch

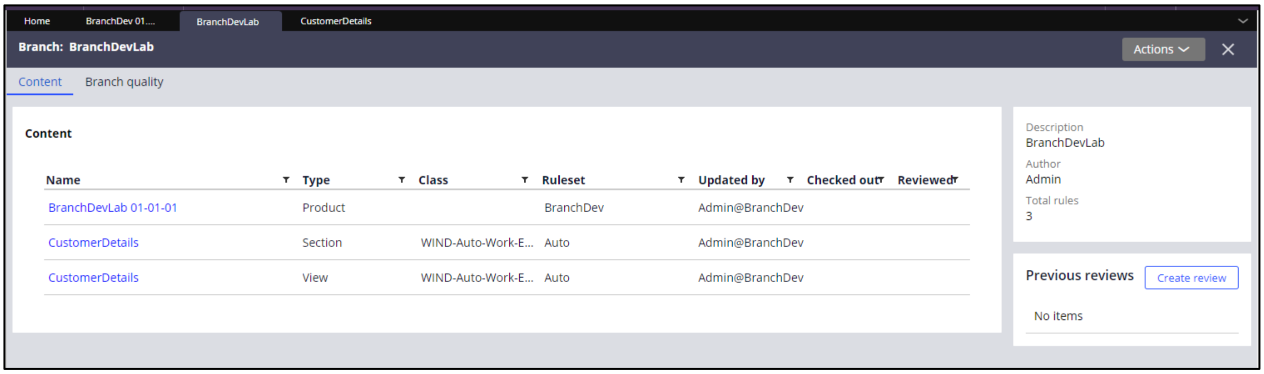
1. **Navigate back** to the last tab opened called **BranchDevLab.**



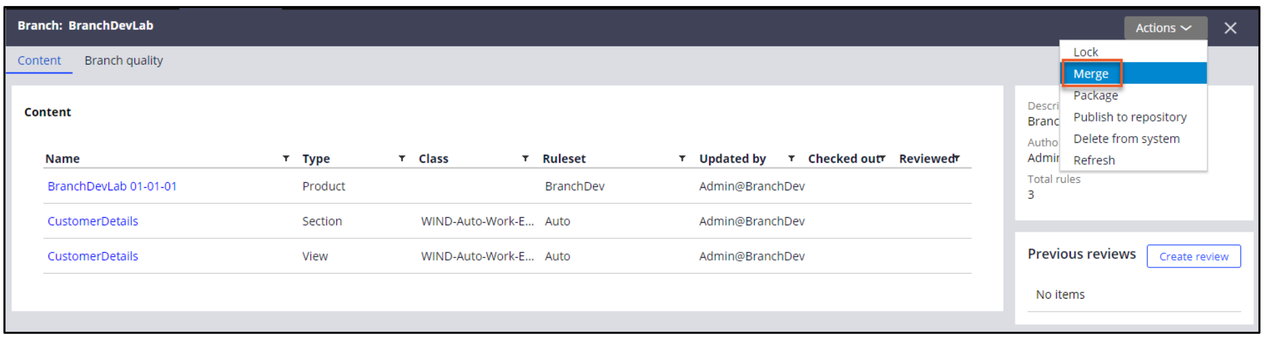
2. From the branch **BranchDevLab**, click **Actions > Refresh.**



3. You will see a list of three rules to merge.



4. From the branch **BranchDevLab**, click on **Actions > Merge.**

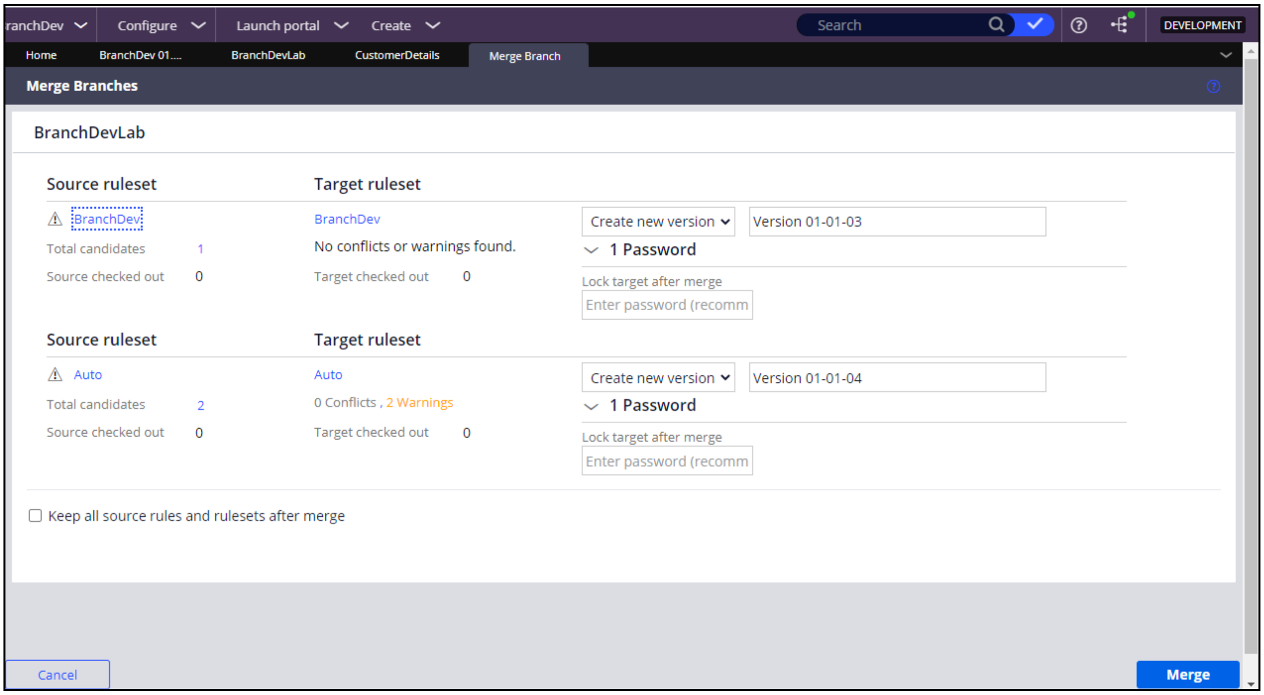


5. Click **Proceed**.

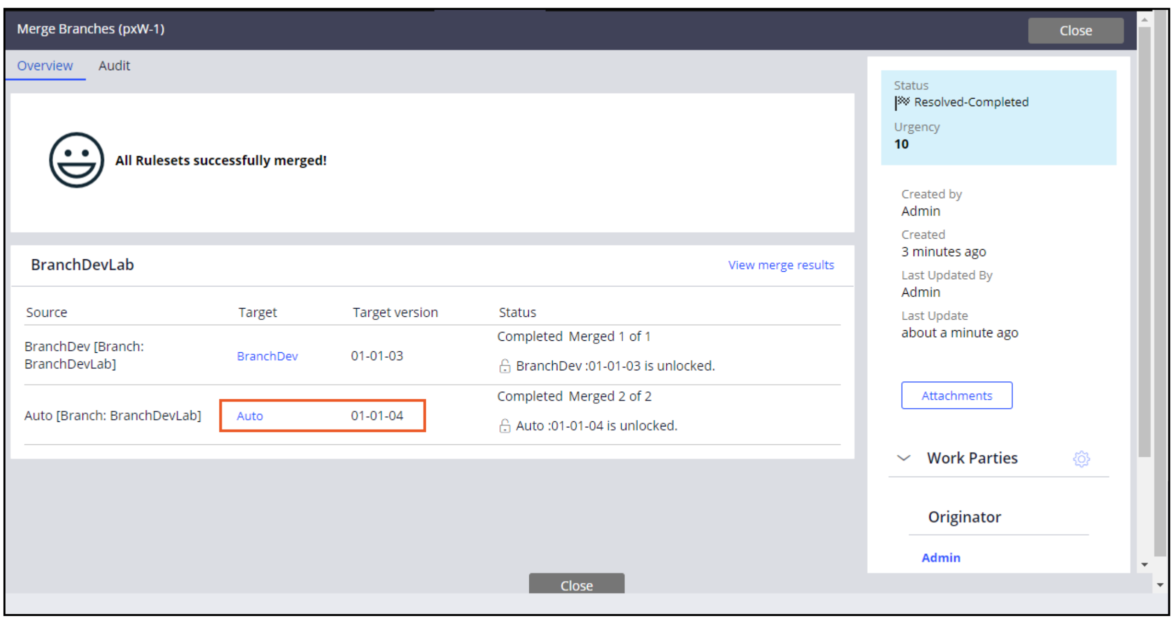
Note there are two different rulesets involved in the merge. The product rule will be merged to the BranchDev ruleset. The two sections will be merged with the Auto ruleset which is part of the built on application. The BranchDev application is built on top of the Auto application which contains the Auto ruleset. Check the warnings saying rules already exist in different branches.

NOTE: As a best practice, you should not unlock or touch a locked ruleset so go ahead and create new versions for both ruleset. Keep in mind both applications are referencing rulesets using the minor version so updating the patch version means the new versions will be automatically taken into account by their respective applications

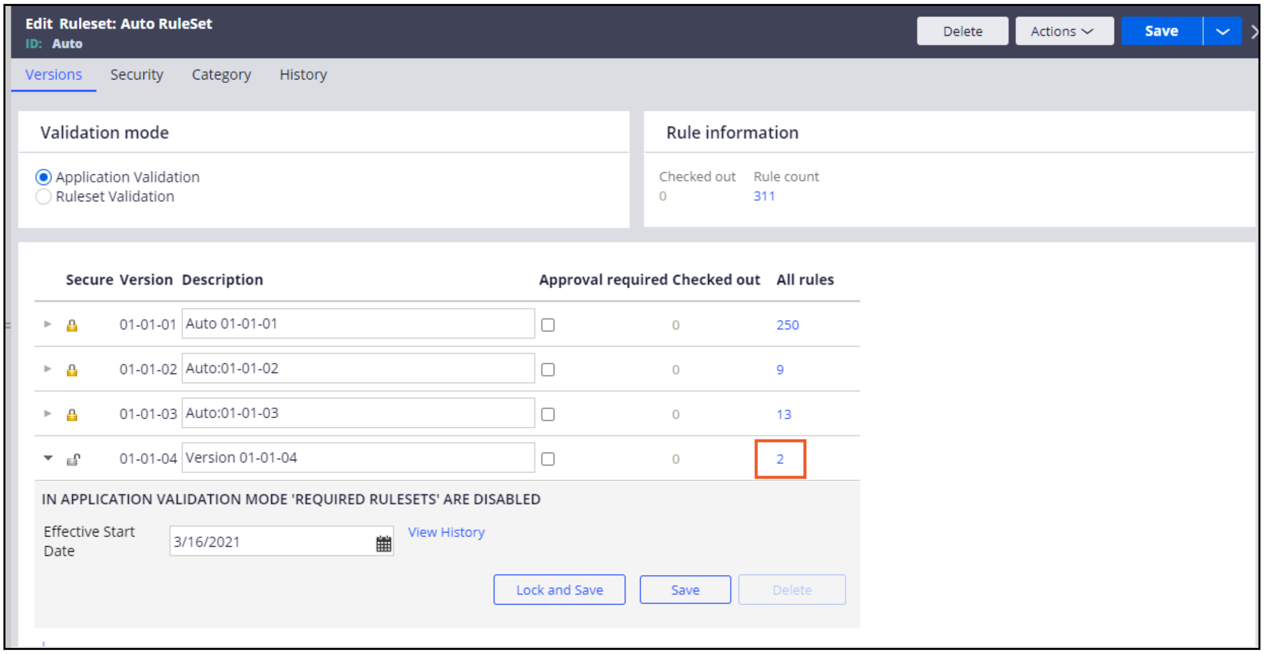
6. Click **Merge**.



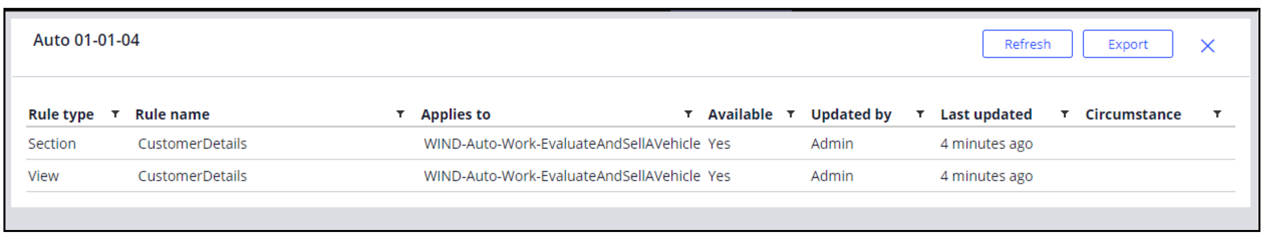
7. Open the **Auto** ruleset by clicking on the link.



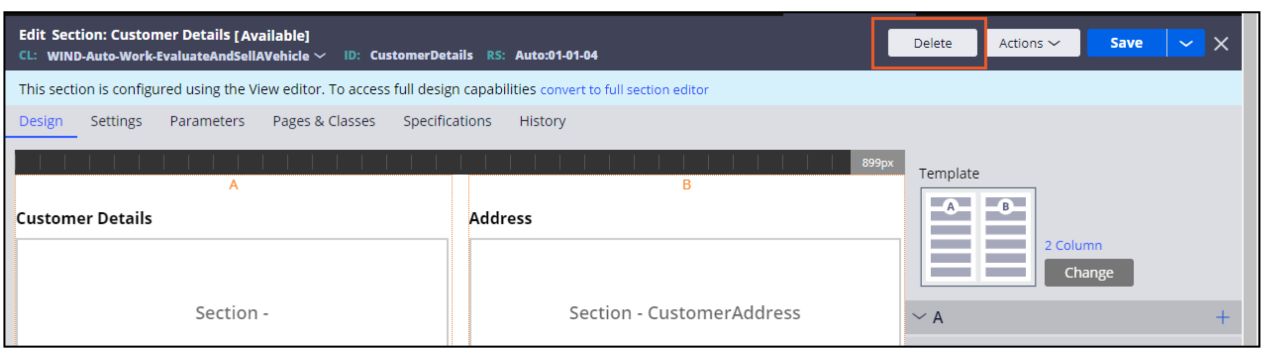
8. Note there are two rules in version **01-01-04**. To delete the two rules you have just merged, click on the number **2** on the right of version **01-01-04**.



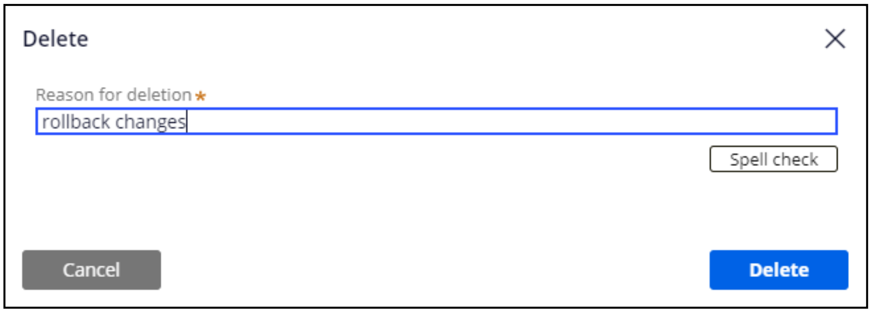
9. Open each rule. Each rule will open in a separate tab.



10. Delete each rule by clicking on the Delete button and adding a reason such as "**rollback changes**".



11. Click **Delete.**



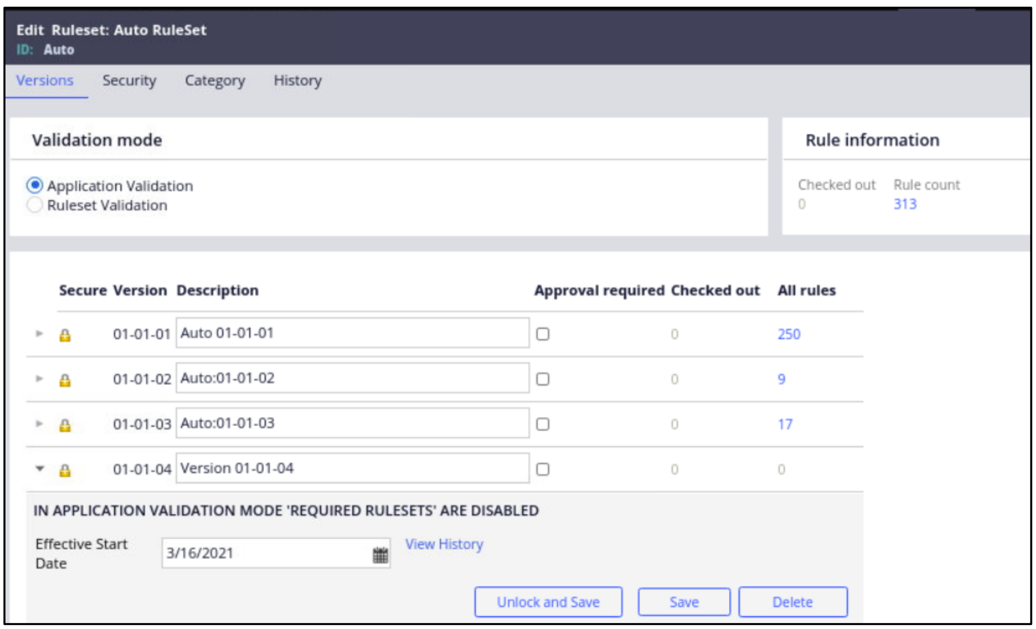
12. Repeat the previous steps to delete the second rule.

NOTE: If you do not delete the 2 rules then they will be present and available for your next exercise and this is not what you want.

13. You must **lock** the ruleset version to continue using the Branch development preference feature. Navigate back to the **Auto ruleset** rule.

    a. Click on the **Actions** button and then refresh.

    b. Ensure there are no more rules in version **01-01-04**.

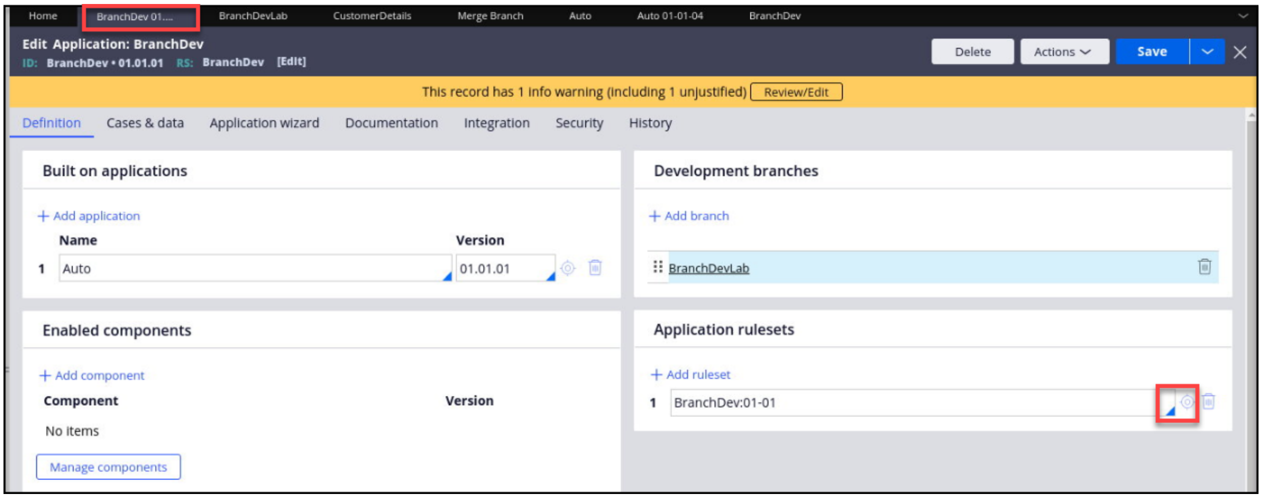


    a. Click on the **Lock and Save** button for version **01-01-04**.

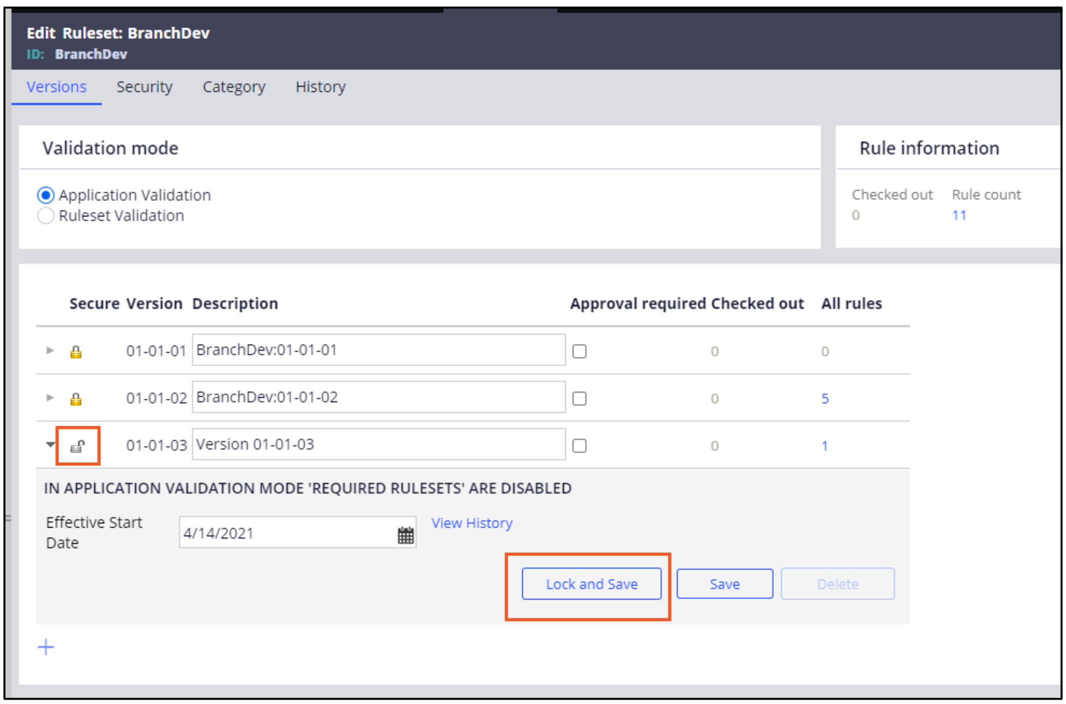
        i. You can use any password such as **rules.**

Note: Since there are no rules in this ruleset, you could delete 01-01-04 instead of Lock and Save.

14. Navigate back to the **BranchDev** Application tab. Open the **BranchDev** ruleset from the BranchDev application by clicking on the gear icon next to it.



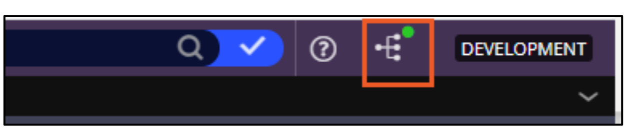
15. Click **Lock and Save** on version **01-01-03.**



16. Save the ruleset.

TIP! To be able to use the **Branch Development Preferences** all the rulesets in the ruleset stack must be locked.

17. Ensure the icon on the top right of the studio is green after a few seconds or else click on the branch development icon and enable the branch by sliding the control.



18. **Log off**.

Manage Feature Driven Development

Scenario

To clearly visualize the participants of your microjourney, associate personas with case types in your application. By adding personas to a microjourney, you communicate which users are involved in each phase of your business process, and which channels they can access.

The new application has been built on another application for the purposes of adding to what already exists. Since Features for both Interview and Career Candidate already exist as 'BUILT ON' features, we will add value to the existing features and will identify some new sub-features as well.

As a business architect or citizen developer, you will add existing and new features to the application inventory and use the feature map to associate work items such as user stories, feedback items, and bugs.

You will also associate personas with the Career Candidate case type and its stages. This association indicates that each persona can access different portals in the case, different information about the process, and perform different actions. While the candidate only provides personal details and uploads necessary documents, HR personnel process the details, run background checks, etc. The case is then routed to a manager, etc.

Operator / User Name	Role*	Username	Password
Admin DocReq	Business Architect / System Architect / Citizen Developer	Admin@DocReq	rules

NOTE: Any design and development team member can work on the prototype.

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login in and enable branch development
Enable branch development to allow modification and creation of cases.

Task 2: Associate features to the case type
To prepare for development, we need to populate the backlog and update the user stories to include the features, sub-features, owner, and the due date.

As the citizen developer, you will associate features, sub-features with the various stages of your case life cycle.

Task 3: Associate User Personas with the case type stages.

When you add a persona to a case type, you create a draft relationship between the persona and the case type. To start processing your case, you need to implement the relationship by granting the persona access to channels.

As the business/system architect or citizen developer, you will associate personas with the various stages of your case life cycle.

Task 4: Associate data types with the case type stages

During interviews with stakeholders, you discover different "types" of data objects (sic) like the job applicant or "candidate" (a person) applying for a position, and the position they are applying for (a thing). In the same way Case Types act as templates for the different types of cases, Data Types act as templates for the data objects that will be associated with the case. Some of the data associated with data types will need to be referenced and used in certain stages of the case lifecycle.

As the business or system architect, you will associate new and known data types with the various stages of your case life cycle.

Task 5: Add work items to features

Each step in a stage represents a human or an automated task. The system architects rely not only on the prototype of the case design but also need appropriate documentation to deliver business expectations and anticipated results. Stories (user stories), Feedback items, and Bugs are work items that can be assigned to architects of appropriate disciplines to achieve this goal.

As the citizen developer, you have been asked to assist with the collection and documentation of user story requirements for each task in the Job application stage. Adding user story work items to features helps to organize them for the design and development team.

Task 6: Verify your work

Use the images provided to check your work.

Task 7: Size your project

Prior to beginning work on the Career Candidate application, stakeholders have requested an estimate of the project size and scope. The estimate is used to consider staffing models and provide an approximate delivery date. Using the Case Designer, assign releases to the channels and data objects associated with the Career Candidate case type. Then, run the Estimator tool to calculate the sizing estimate for the MLP 2 release.

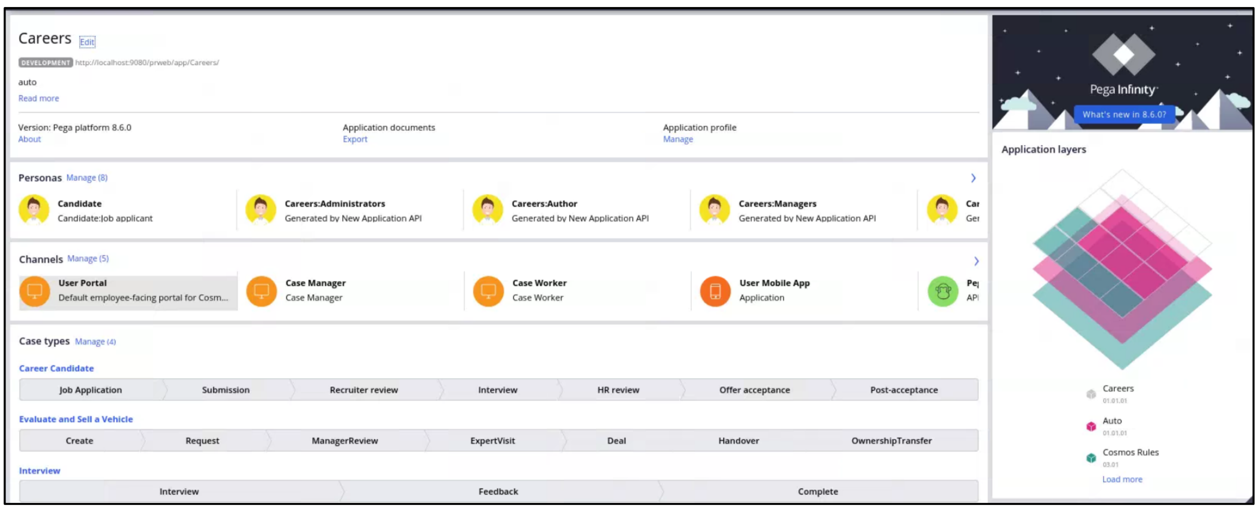
> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Login in and enable branch development

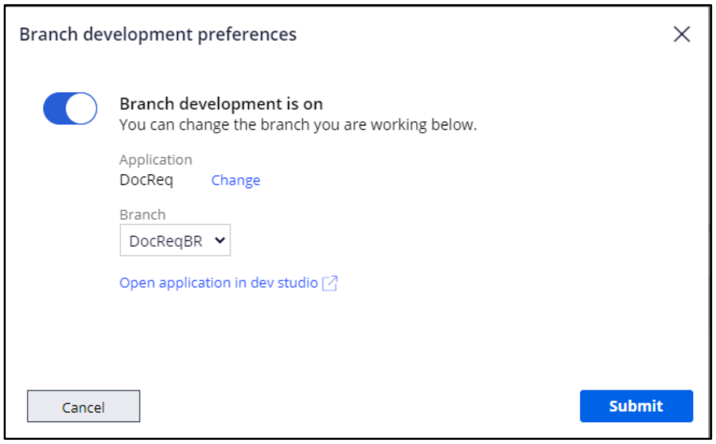
1. In the Pega login view, log in with the User ID **admin@docreq** and the password **rules**, then click the **Log in** button.

2. App Studio appears, and the application **Overview** landing page displays by default.



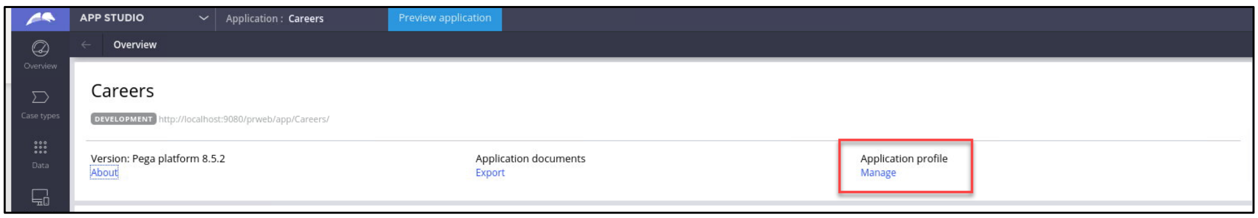
3. From the title bar click the **Toggle branch development** button.

4. Move the slider to turn branch development on. From the **Branch** dropdown ensure that **DocReqBR** is selected and click **Submit**.

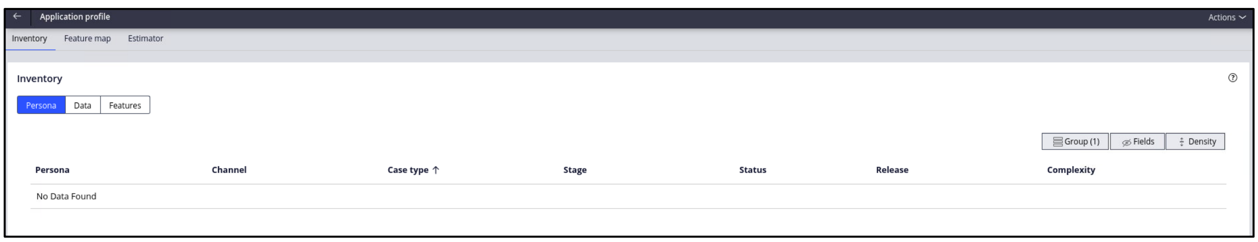


Task 2: Associate features to the case type

1. Click **Manage** under Application profile at the top of the Overview landing page.

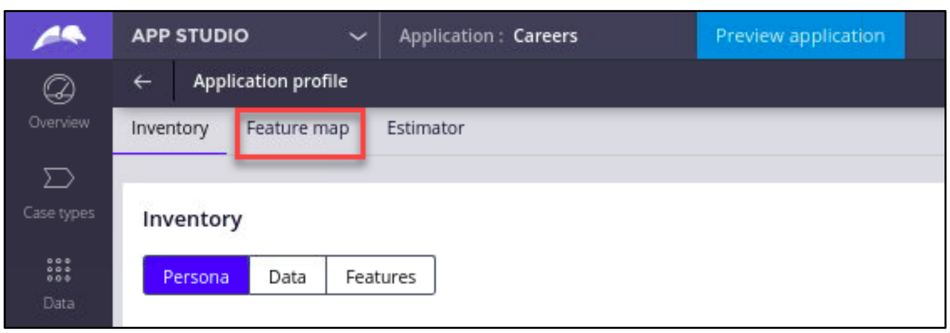


2. The Application profile has three tabs, Inventory, Feature map, and Estimator.

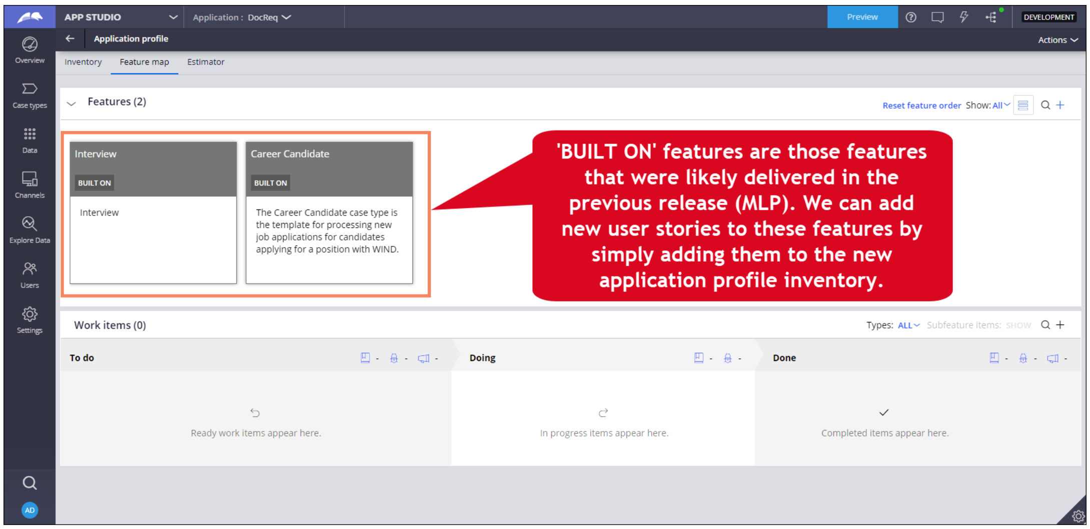


NOTE: The Inventory tab lists the Personas, Data Types (data objects), and features related to this Case Type.

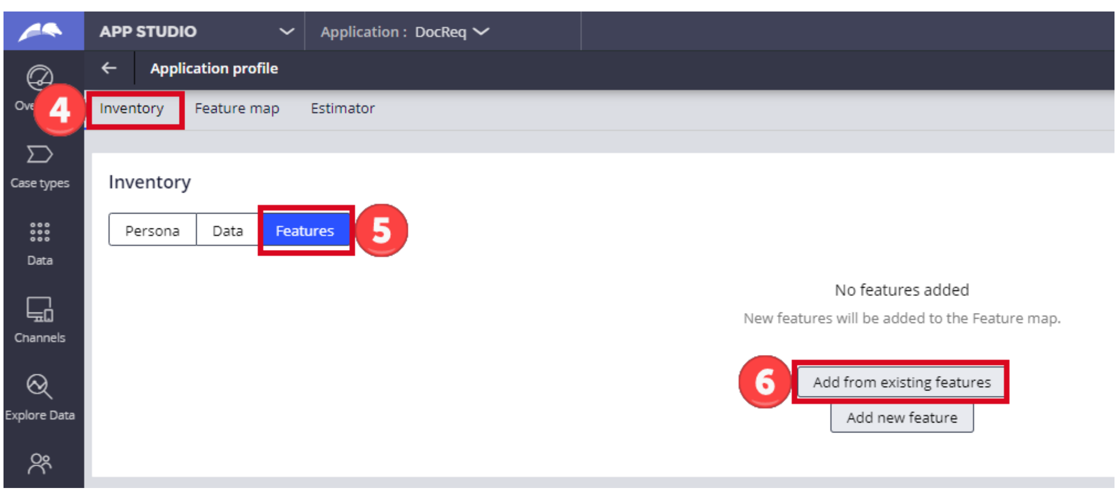
3. Select the Feature map tab.



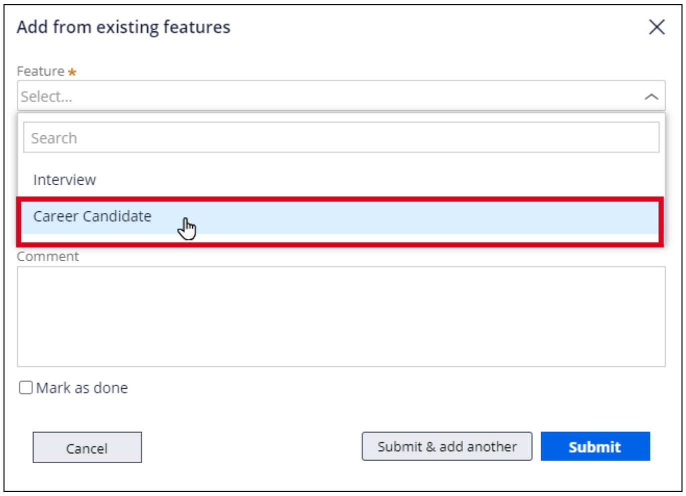
The Feature map displays. Currently, two main features exist, Interview and Career Candidate. These features were created in the application upon the current application has been built. We are inheriting these 'BUILT ON' features and can add new user stories to them in the current release (MLP 2) main feature is intended to document the intent of a case type. showing us the current application build is "BUILT ON" the features of another application. We can edit and add new user stories to these features by adding them to the new application's inventory.



4. Select the **Inventory** tab.
5. Select **Features**.
6. Click the **Add from existing features** button



7. In the **Add from existing features** dialog, in the **Feature*** drop-down, select **Career Candidate**:



8. Configure the **Candidate** feature with the following criteria:

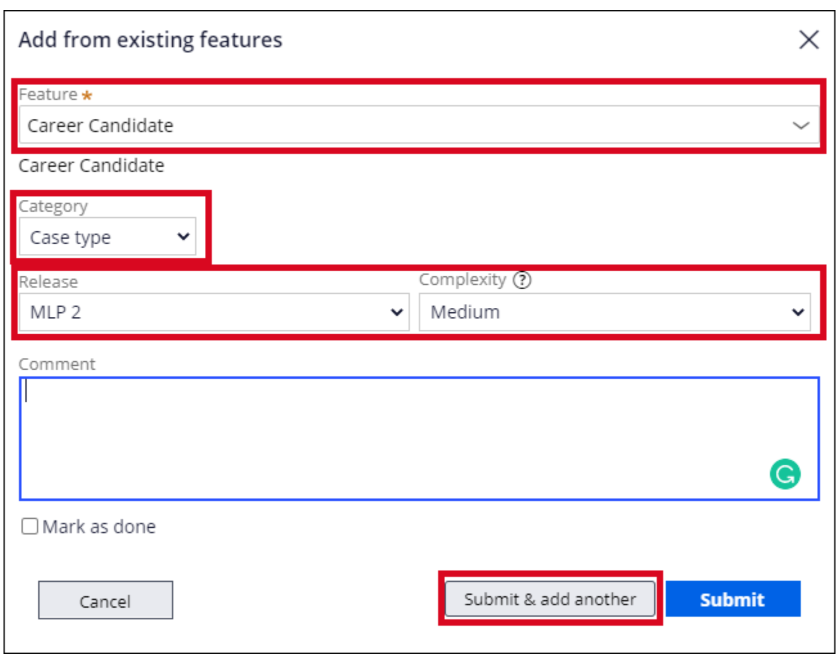
    Category = Case Type

    Release = MLP 2

    Complexity = Medium

    Comment = leave blank for now

    Mark as done = Unchecked (not done)



9. Click **Submit & add another** to add the **Interview** feature with the following criteria:

    Feature = Interview

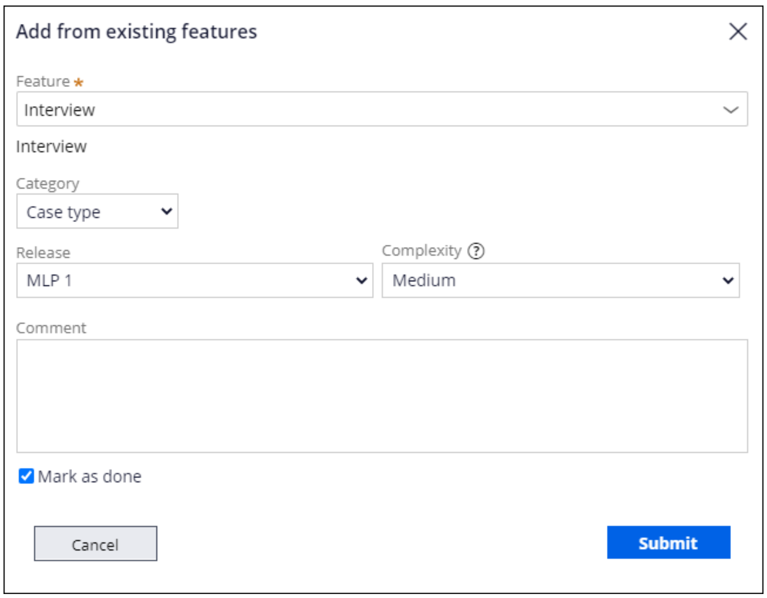
    Category = Case Type

    Release = MLP 1

    Complexity = Medium

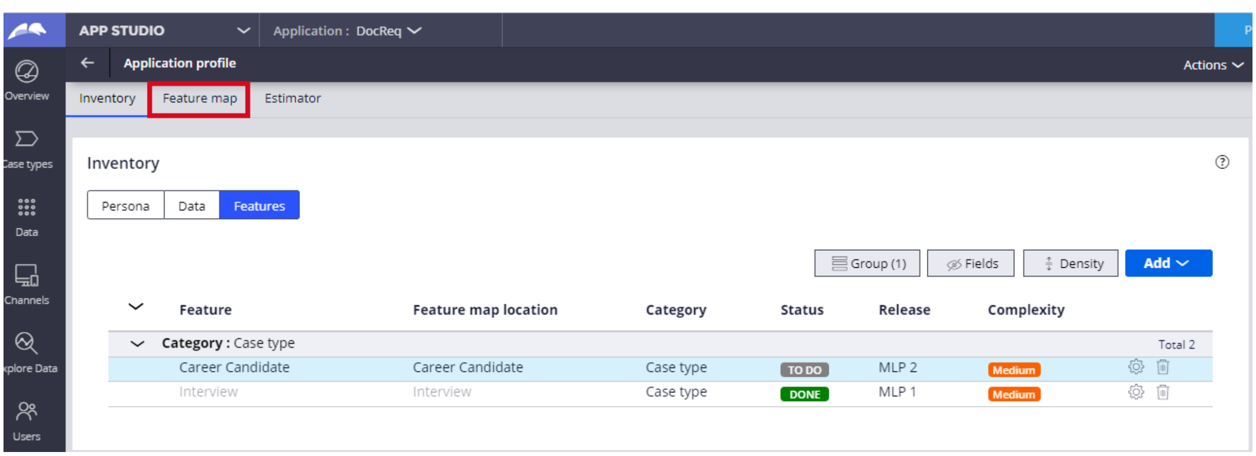
    Comment = leave blank for now

    Mark as done = Checked (done)



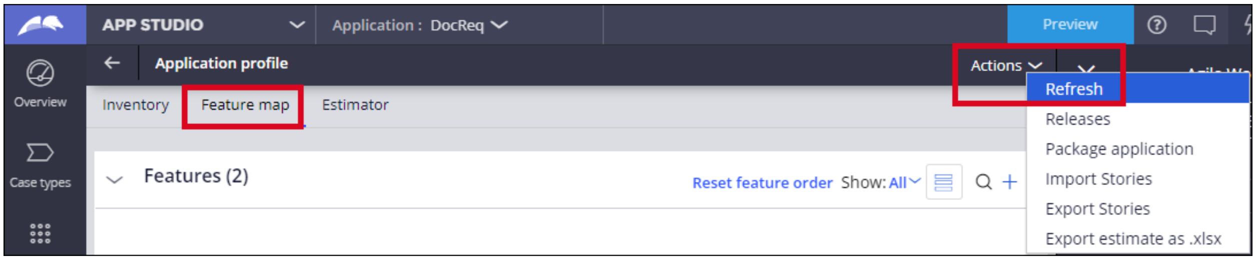
10. Click **Submit.**

11. The Inventory of Features should now appear like the following image:

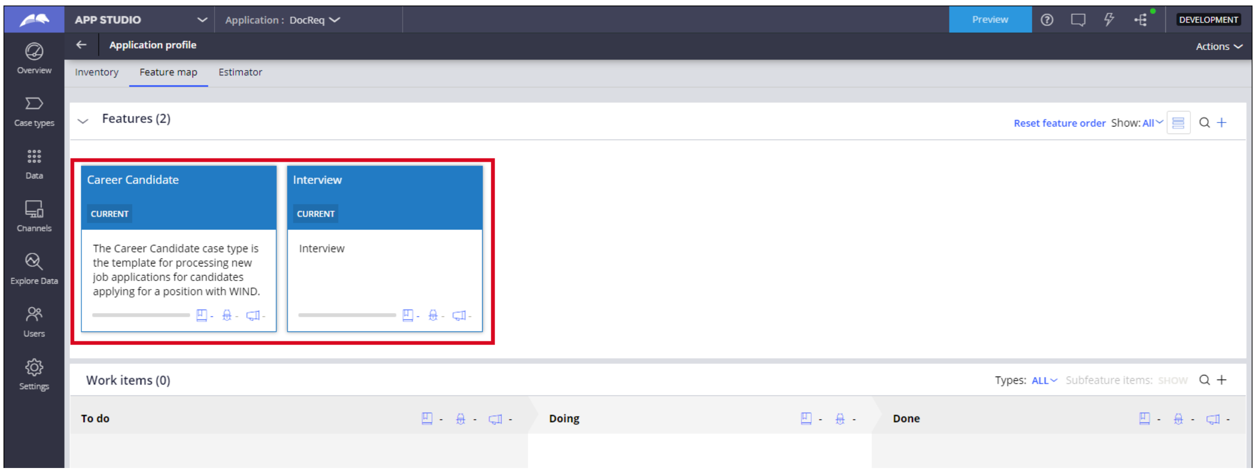


12. Select the **Feature map** tab.

13. From the **Actions** menu select **Refresh**:

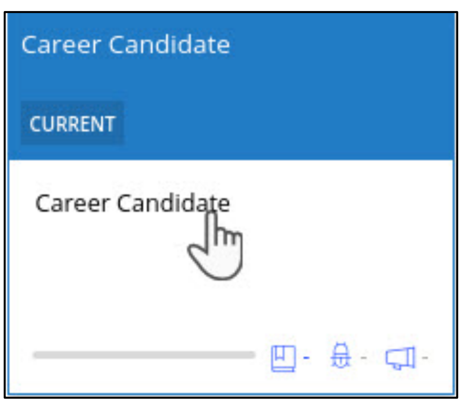


14. Both main features have now been changed from **BUILT ON** to **CURRENT**:

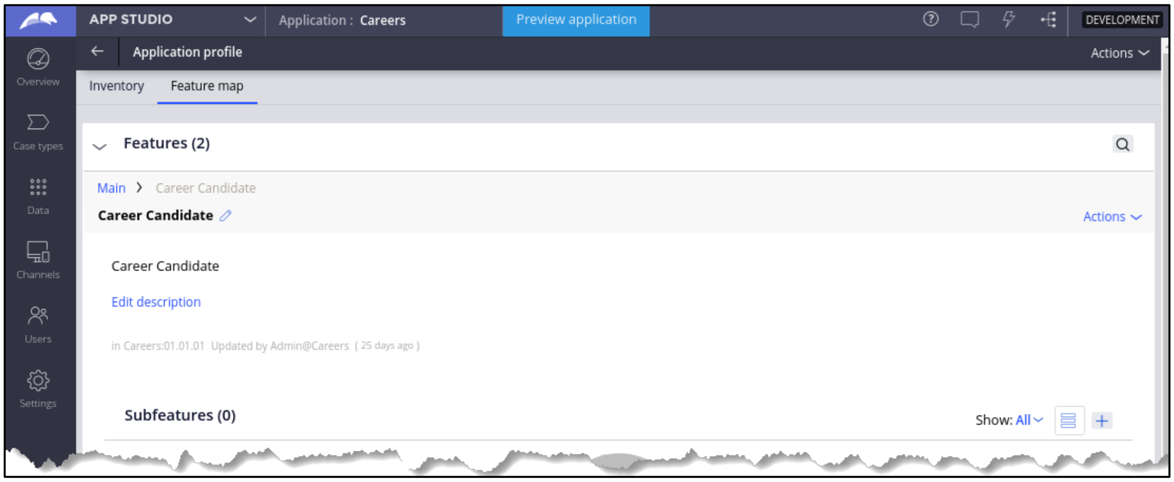


NOTE: Features are listed in the order they are added, oldest first, newest last. You may choose to rearrange the order:

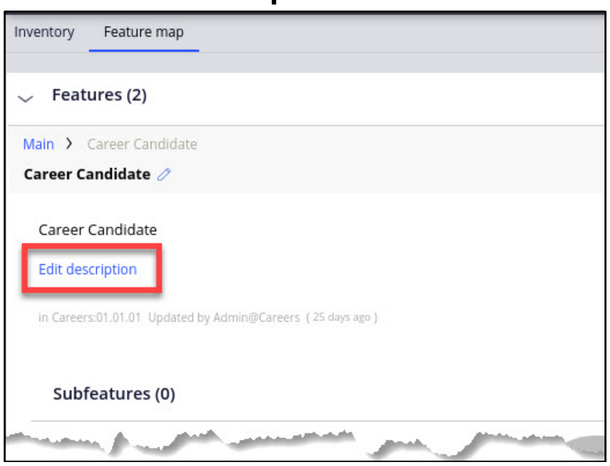
a. Edit the **Career Candidate** main feature. Click the **Career Candidate** feature tile to open the feature details window.



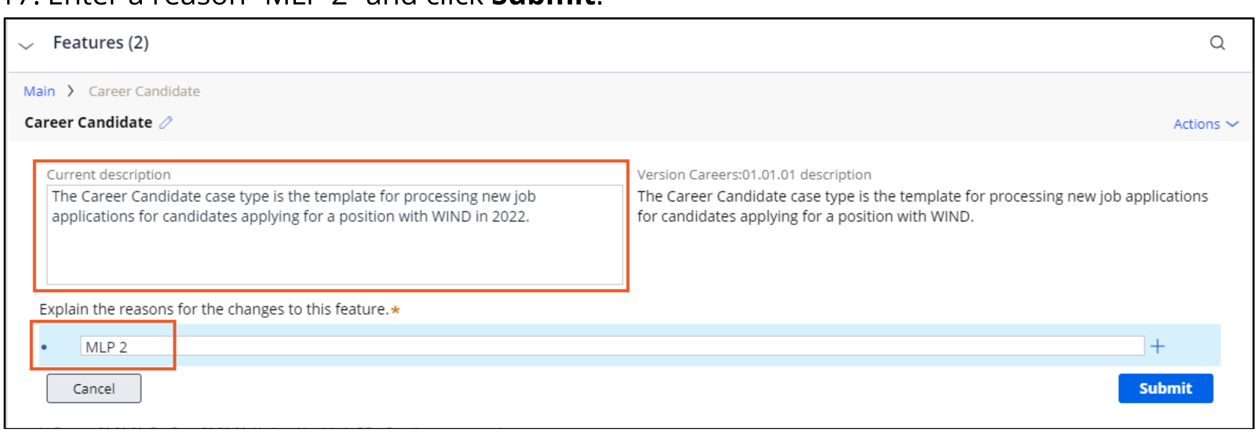
The following screen is displayed:



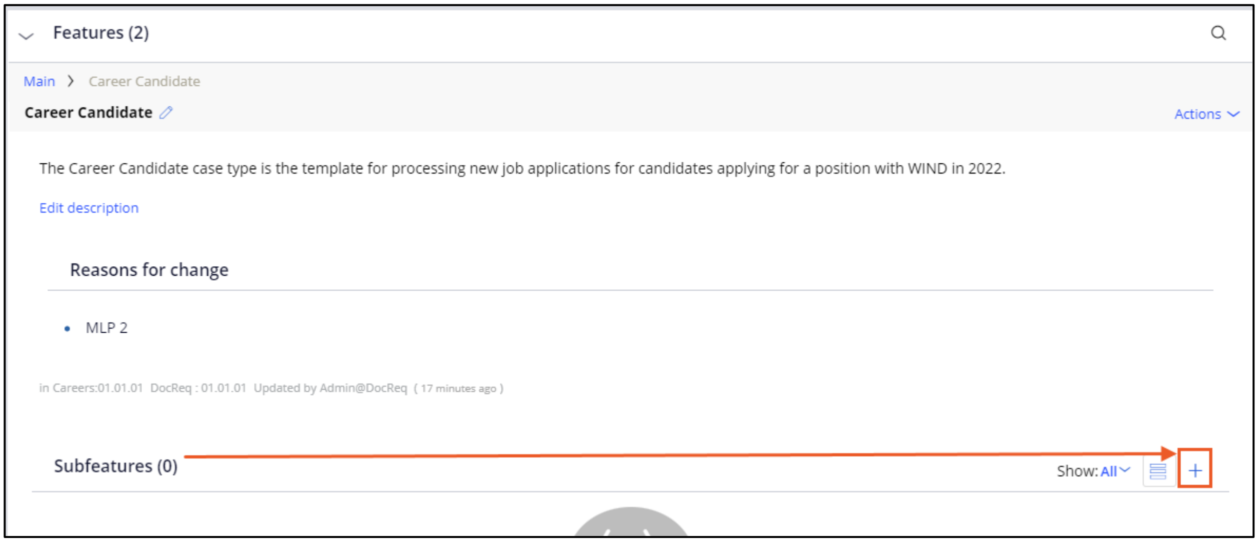
15. Click **Edit description.**



16. Set the **Current description** field to, **"The Career Candidate case type is the template for processing new job applications for candidates applying for a position with WIND in 2022."**
17. Enter a reason "MLP 2" and click **Submit**.



18. Add a subfeature to describe each stage associated with the main case type feature. Click the + icon on the far right of the **Subfeatures (0)** area to create a new subfeature.



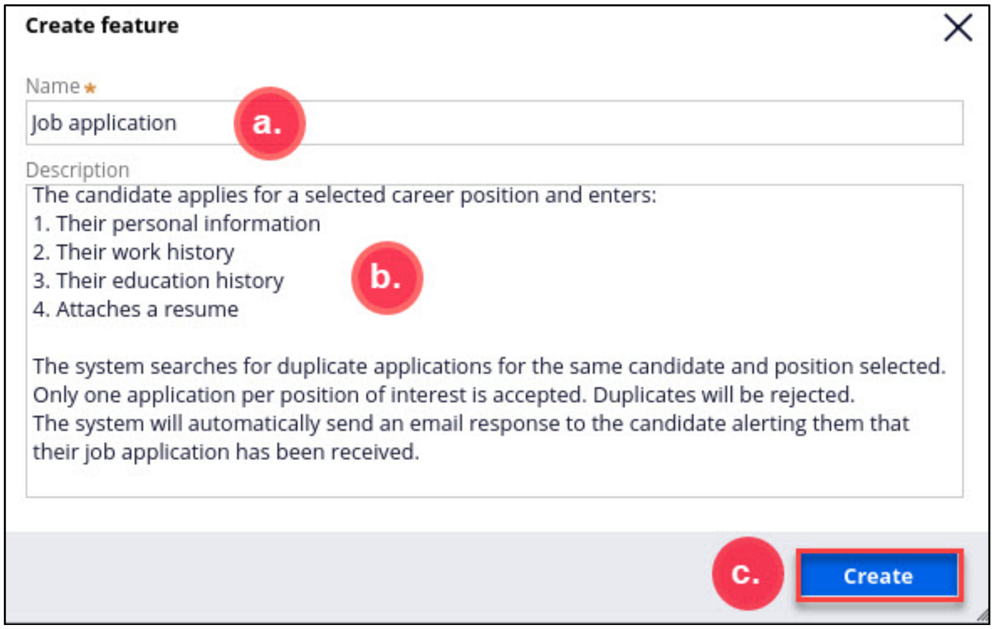
19. A **Create feature** window appears.

20. Add the following information to the **Create feature** fields.
    a. In the **Name** field, enter **Job application** to match the stage this subfeature describes.
    b. Enter the following information in the **Description** text area:
    "The candidate applies for a selected career position and enters:
    1. Their personal information
    2. Their work history
    3. Their education history
    4. Attaches a resume

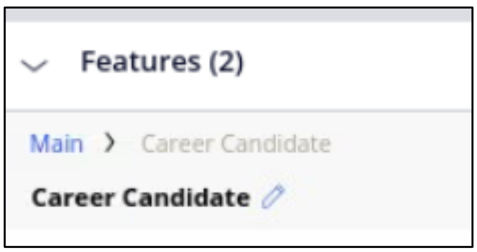
    The system searches for duplicate applications for the same candidate and position selected. Only one application per position of interest is accepted. Duplicates will be rejected.

    The system will automatically send an email response to the candidate alerting them that their job application has been received."

c. Click the **Create button.**



21. Click **Main** in the bread-crumb feature at the top of the form to navigate back to the **Career Candidate** feature edit form:

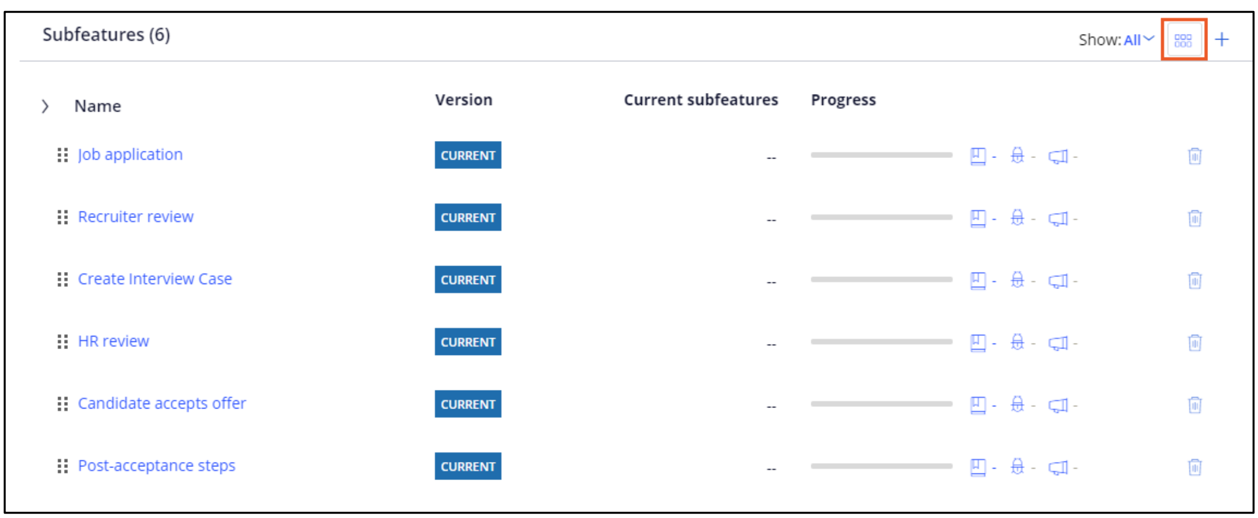


22. Note the change in the Career Candidate main feature tile. It now indicates there is 1 current subfeature:

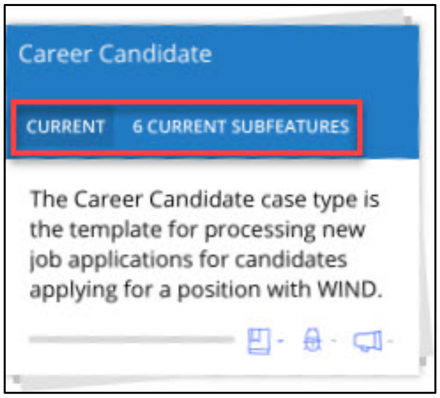
23. Repeat steps 19-23 to add more sub-features to document the five remaining Career Candidate primary stages. Use the information in the following table for the name and description of each subfeature:

Stage Name	Feature Name	Description
Recruiter review	Recruiter review	The recruiter conducts a phone interview with the candidate. If needed, the recruiter sends the candidate an email that contains a link to an online version of the Myers-Briggs personality test. Upon completion, the recruiter scores the Myers-Briggs test passed or rejected for the candidate.
Interview	Create Interview Case	The interview process begins. (Main feature)
HR review	HR review	HR reviews the interview scores and approves or rejects the candidate. If approved, a background check is completed. If the background check passes policy standards: 1. The compensation/pay rate is calculated 2. An offer letter is composed and sent to the candidate via DocuSign email.
Offer accepted	Candidate accepts offer	The candidate signs the offer letter via DocuSign. WIND HR is automatically notified.
Post-acceptance	Post-acceptance steps	HR begins the Onboarding process.

Once all the subfeatures from the table above are entered, the list of subfeatures should look like the image below:

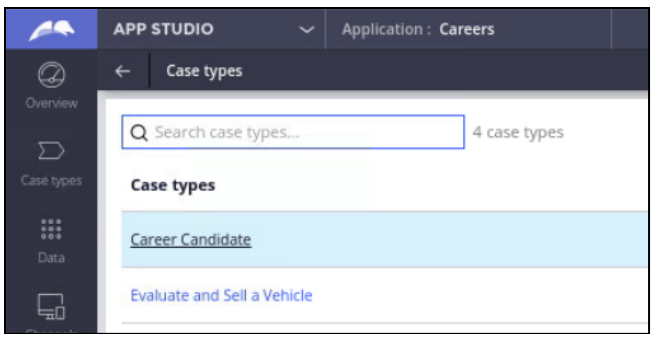


24. Select **Main** in the bread-crumb feature at the top of the form to navigate back to the **Career Candidate** feature edit form.
25. Note the change to the **Career Candidate** main feature tile. There are now **6 current subfeatures:**

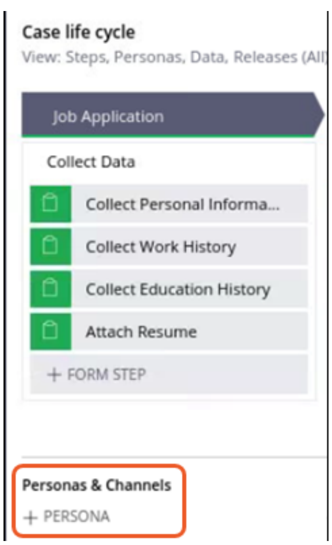


Task 3: Associate user personas to the case type stages

1. In the navigation pane of App Studio, click **Case types**, and then select the **Career Candidate** case type.



2. In the **Job Application** stage, locate the **Persona** section.

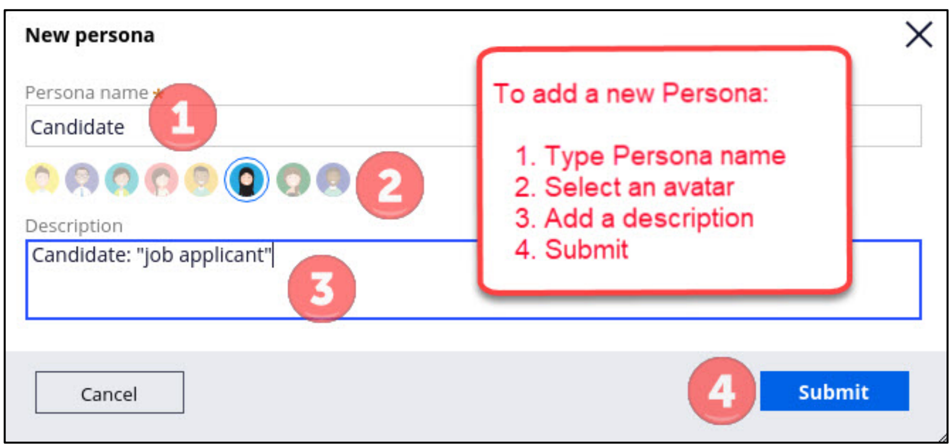


3. Add a persona by clicking **+ PERSONA**, and then select **Candidate** from the list. If the Candidate does not exist, add it by choosing **New persona**. Click **Save**.

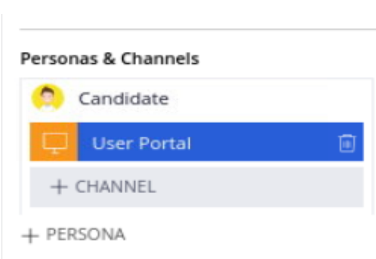
NOTE: You have choices when associating a Persona to a stage:

Choices	Actions
Select an existing persona	1. In the personas list, select a persona that you want to add.
Create a new persona	1. In the personas list, select New persona. 2. In the New persona window, in the Persona name field, provide a descriptive name for your persona. 3. Select an avatar to represent the persona. 4. Optional: To provide more information about the persona, in the Description field, enter additional text.

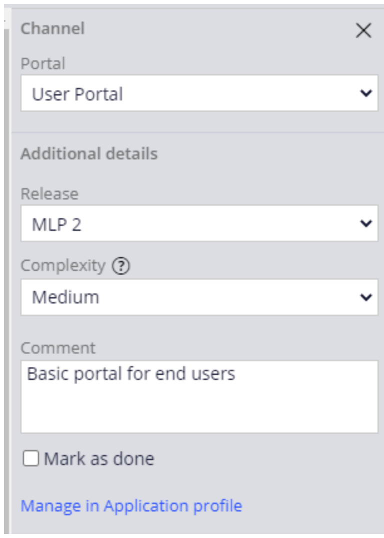
NOTE: When selecting or creating a new persona, additional details can be added in the properties panel to the far right of the workspace.



5. In the **Persona properties panel**, in the **Channel list**, select the channels that the persona can access. Click on **+CHANNEL** add a channel. Select the Channel type **Portal**.



6. On the right-hand side, the Channel properties window is displayed. To plan when you want to include the persona in your microjourney, associate the persona with a release. In the **Additional details** section, select the release **MLP 2**. To provide more information, in the **Comment text box**, enter a short description as shown below:



7. Click **Save**.
8. Add additional personas by repeating steps 3-7 substituting the information in the table below. :

Note: To add channels, click + CHANNEL, then select Portal. On the right-hand side Channel properties window, if the portal does not exist in the drop down, create it by selecting "Create new". If the persona does not exist, create it by selecting "New persona". If the persona does not appear in the case type after you add it. Click **Save** to commit the change and refresh.

Stage #	Stage	Persona	Channel
3	Recruiter review	Recruiter	Case Manager
3	Recruiter review	HR Representative	Case Manager
4	Interview	Careers:Manager	Case Manager
4	Interview	HR Representative	Case Manager
5	HR review	HR Representative	Case Manager
5	HR review	Careers:Manager	Case Manager
6	Offer acceptance	Candidate	User Portal
6	Offer acceptance	HR Representative	Case Manager
7	Post-acceptance	HR Representative	Case Manager
7	Post-acceptance	HR Manager	Case Manager

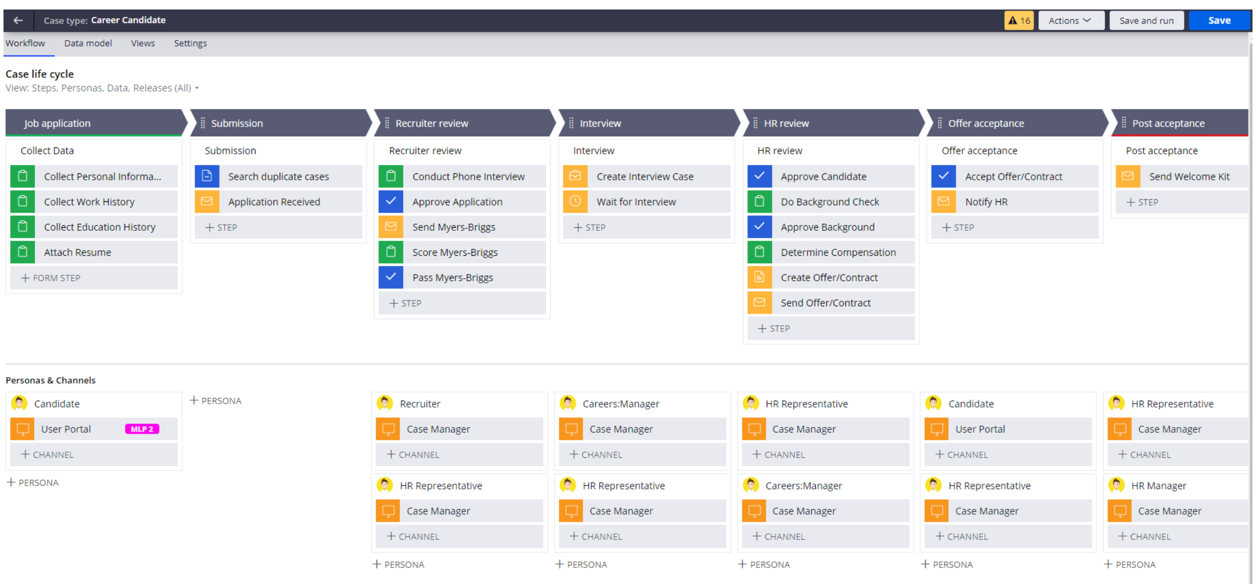
9. Click **Save**.

NOTE: When drafting the case life cycle in the case designer, save and save often.

10. Add personas to the alternate stages using the information in the table below:

Alternate Stage	Persona	Channel
Candidate rejected	Careers:Manager	Case Manager
Candidate rejected	HR Representative	Case Manager
Candidate withdrawn	Candidate	User Portal
Candidate withdrawn	HR Representative	Case Manager
Offer rejected	Candidate	Use Portal
Offer rejected	HR Representative	Case Manager

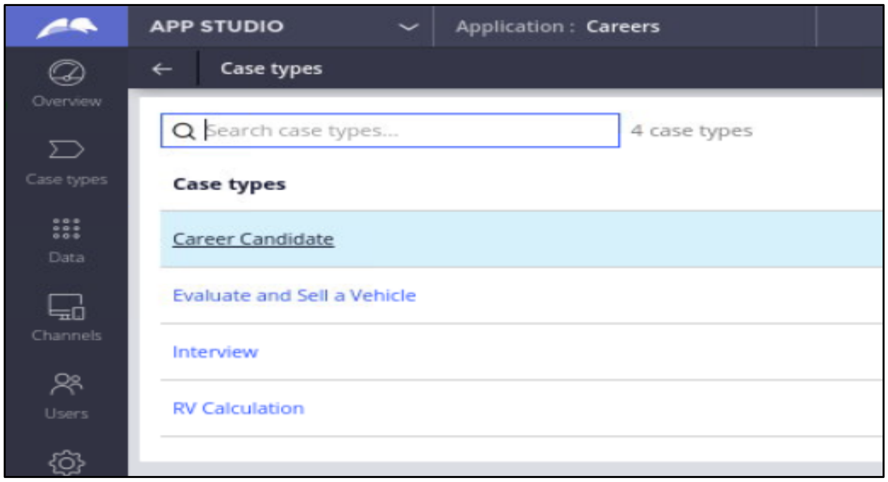
Click **Save**.



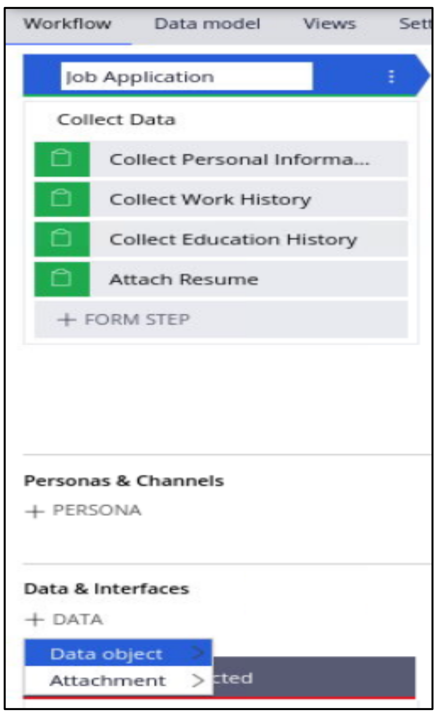
Task 4: Associate known data types with the case type stages.

During interviews with stakeholders, you discover some of these data relationships and associate them with the case type and its stages.

1. In the navigation pane of App Studio, click **Case types**, and then select the **Career Candidate** case type:



2. In the **Job application** stage, locate the **Data** section. The Data & Interfaces section is below the Personas under each stage.



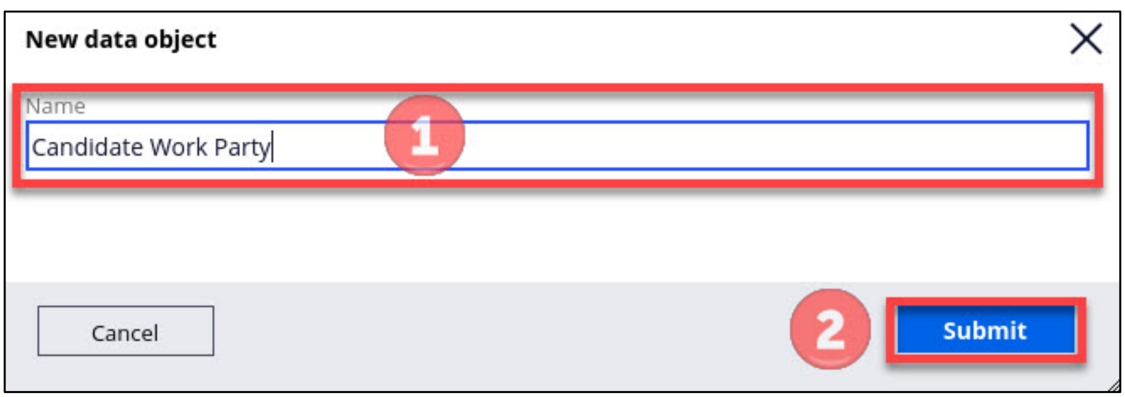
4. Add a new data type/object by clicking **+ DATA:**

NOTE: You have choices when associating a data object to a stage:

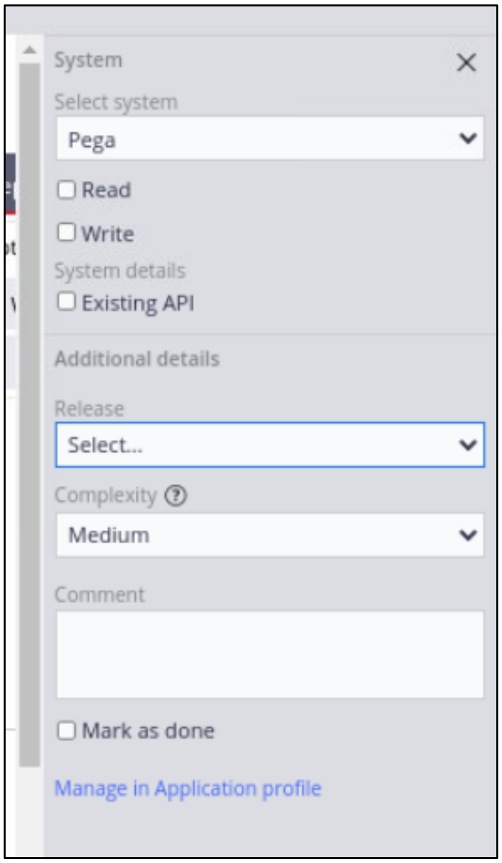
Choices	Actions
Create a new data object	1. From the data object list, select **New Data Object.** 2. In the **New data object** window, in the **Name** field, provide a descriptive name for the type of data the object represents.
Select existing data object	1. If the data object that you wish to relate to the stage already exists, simply choose it from the list of data types.

2. Select **Data object > New data object**.

3. In the **New data object** window enter Candidate Work Party in the **Name** field, then click the **Submit** button.



NOTE: When associating a data object to a stage, the system architect or business architect may add additional details in the properties panel to the far right of the workspace as seen below:

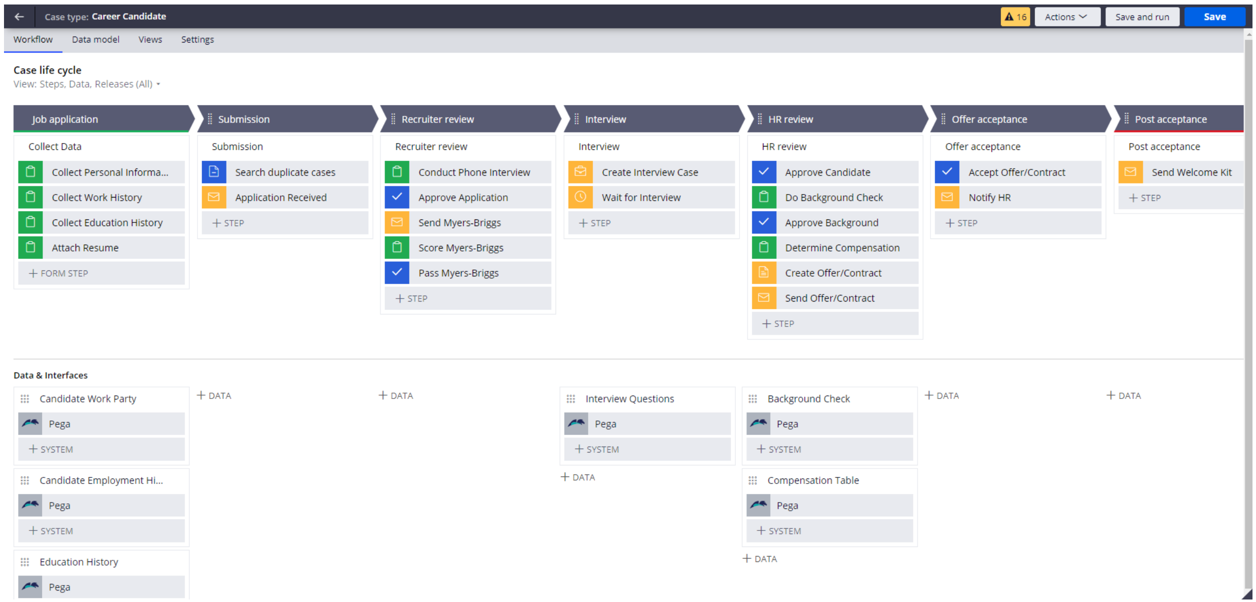


4. Click **Save**.

5. Repeat steps 5-7 to add more data objects to the case design using the following table for reference:

Stage #	Stage	Data Type/Object
1	Job application	Candidate Work Party
1	Job application	Candidate Employment History
1	Job application	Education History
1	Job application	Resume
4	Interview	Interview Questions

5	HR Review	Background Check
5	HR Review	Compensation Table



Click **Save.**

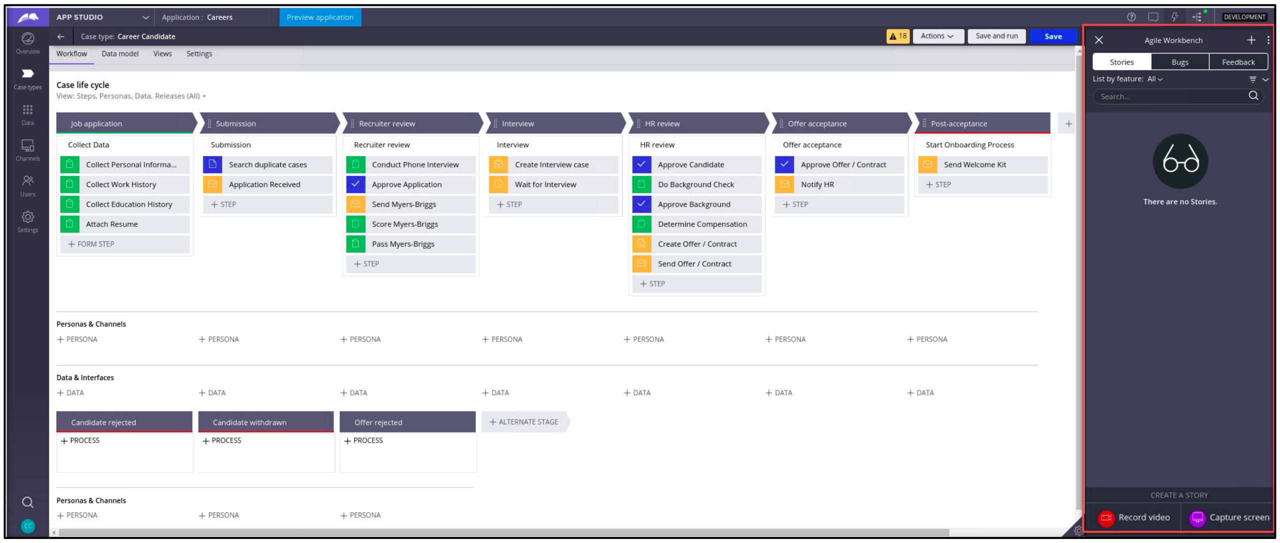
Task 5: Add work items to features

Each step in a stage represents a human or an automated task. As the citizen developer, you have been asked to assist with the collection and documentation of user story requirements for each task in the Job application stage. Adding user stories to features helps to organize them.

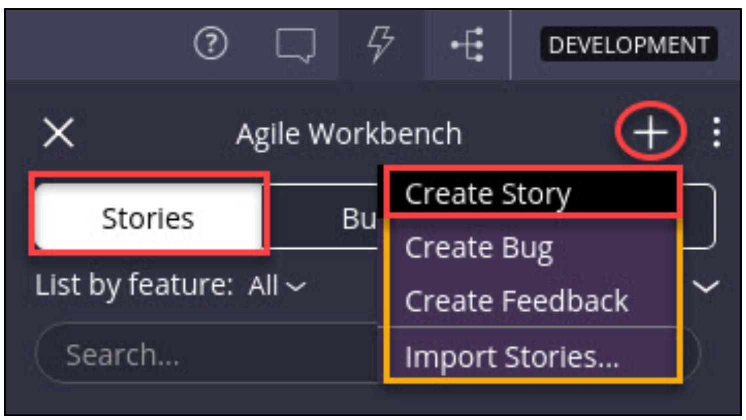
In a real-world scenario, business team members (Business or Citizen Architect) would interview the appropriate SME(s) and document a story for each task performed in each stage. For the purpose of time, in this lab, we will only be adding stories to the Job application stage.

1. In App Studio, click on the **Case types** explorer and select the **Career Candidate** case type.
2. Open **Agile Workbench**. Click the Agile Workbench **lightning bolt** icon in the header (upper-right):

The Agile Workbench panel opens on the right side of the workspace.

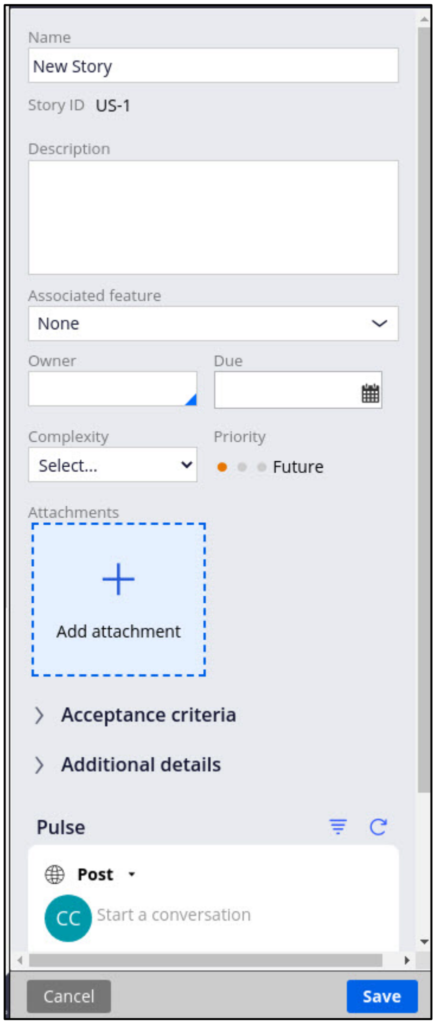


3. Work items (stories, bugs, and feedback items) can be added directly or imported through Agile Workbench. At the top of the Agile Workbench panel:
   a. Select the **Stories** tab.
   b. Click the Create new work item **+** icon.



   c. Select **Create Story** from the list of work item types.

d. The New Story form opens in the properties panel on the right side of the case designer.

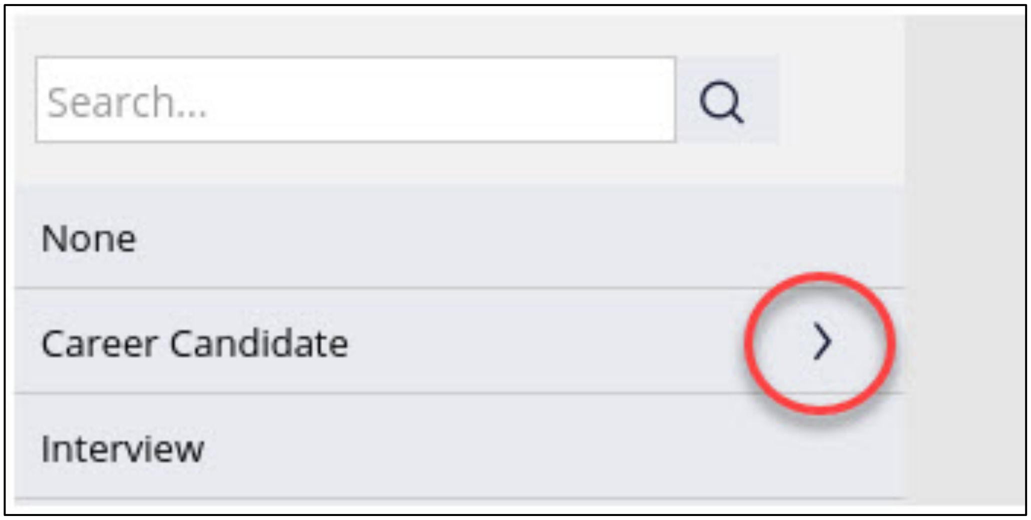


e. In the **Name** field, enter, **Collect personal information**.

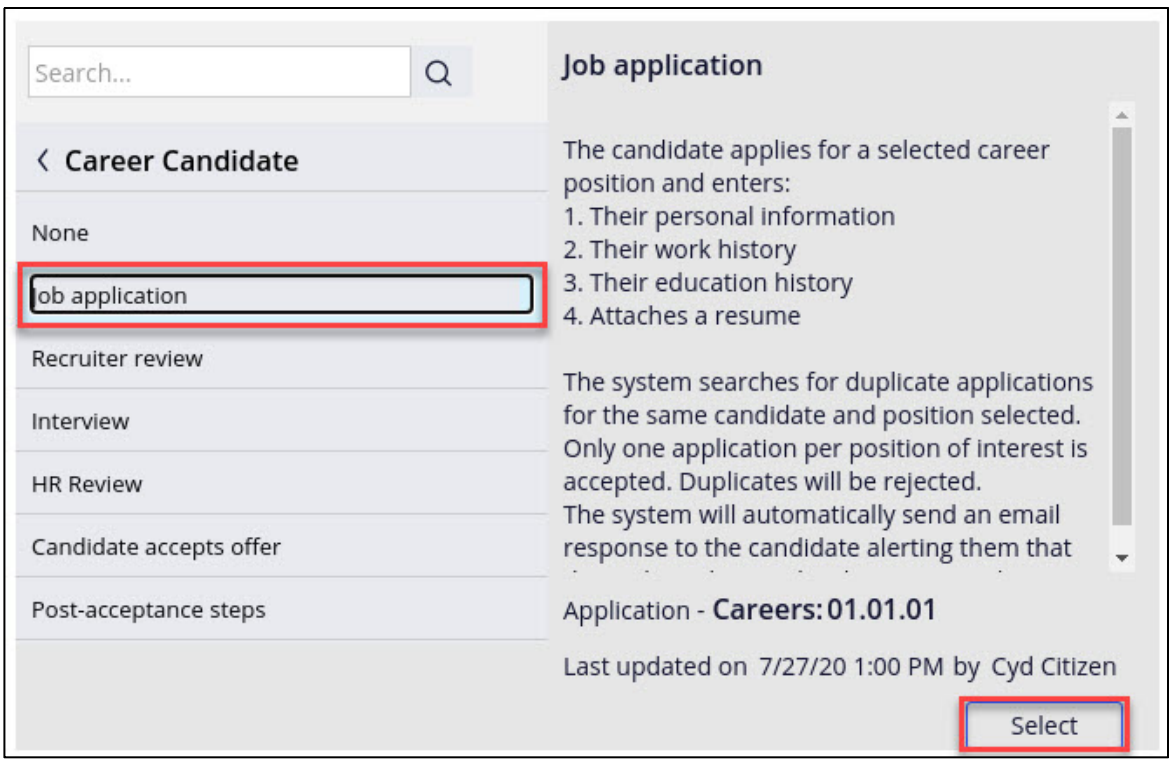
f. In the **Description** field, enter the following information:

I, the candidate, enter the following information on the Collect personal information form:
First Name (required)
Middle Name (optional)
Last Name (required)
Date of Birth (day-month-year)
Postal address (field group)
- Address 1 (text; required)
- Address 2 (text; optional)
- City (text; required)
- Country (dropdown menu; required)

g. In the **Associated feature**, select the dropdown and click the **Career Candidate** right chevron, > to see the subfeature list.

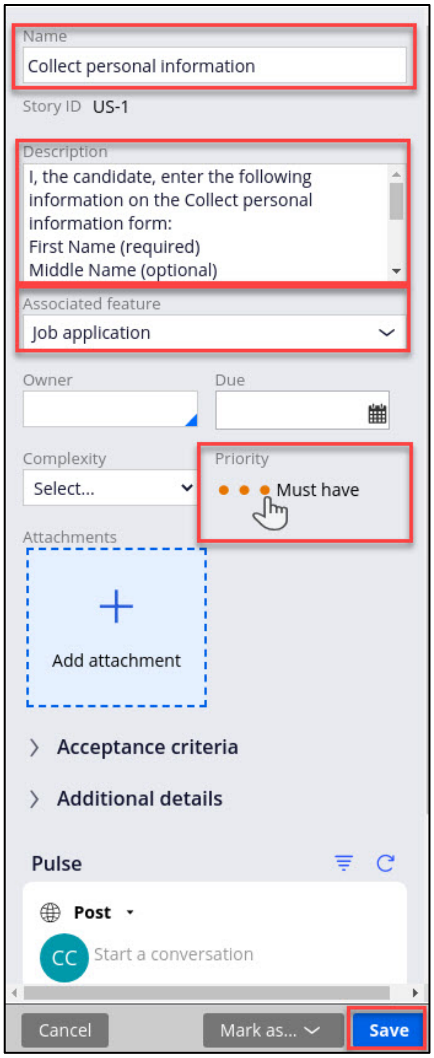


h. Choose **Job application** and click the **Select** button.

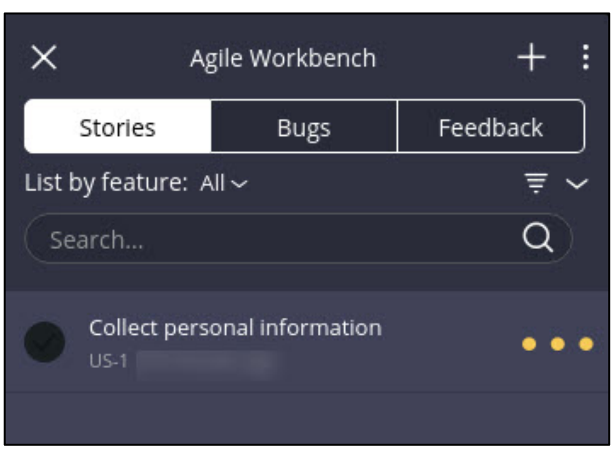


i. Skip the **Owner**, **Due**, and **Complexity** fields for now.
j. Set **Priority** to be **Must Have** (three dots).

k. Skip the **Acceptance criteria**, **Additional details**, and **Pulse** post fields for now.
l. Click the **Save** button.



Agile Workbench now contains one story and should now look like the following image:



NOTE: A green confirmation message will appear. You can undo changes, or delete the story, by selecting the X on the left of the message: "X Created Collect personal information"

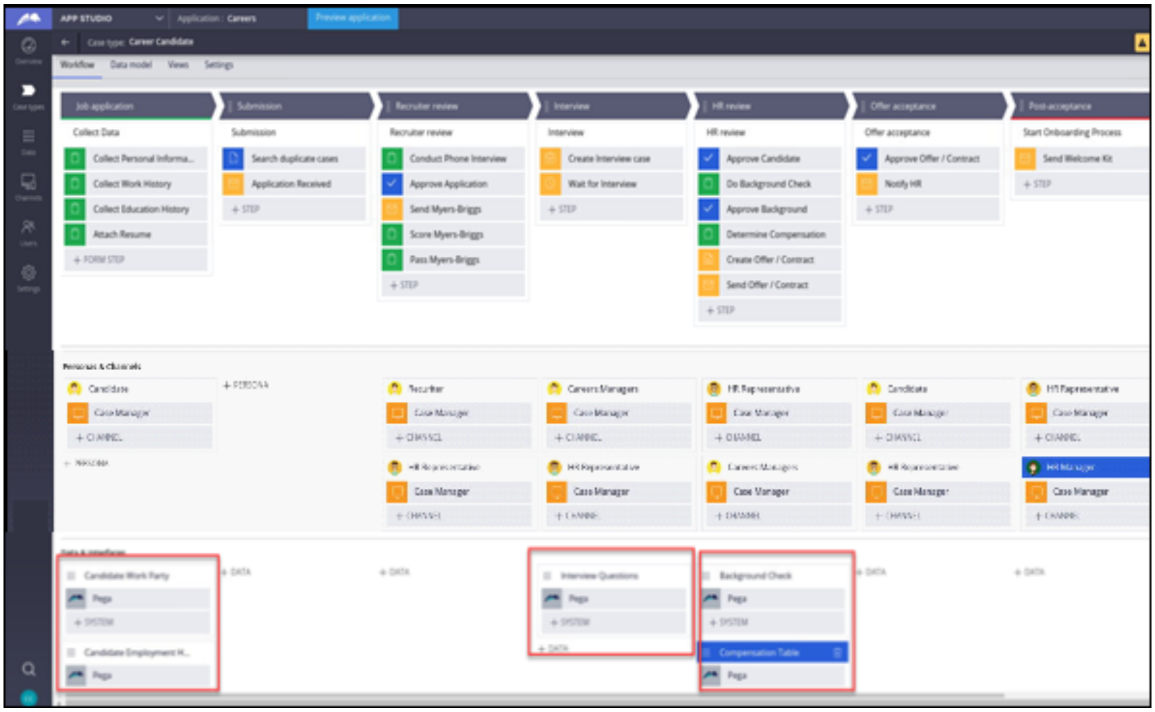
m. Repeat step 3, sub-steps **a** through **m**, to add five more stories, one for each step in the Job application stage. Use the following table as a guide:

Story Name	Description	Associated feature	Priority
Collect work history	I, the candidate, will enter my employment history in the online form provided.	Job application	Must Have ● ● ●
Collect education history	I, the candidate, will enter my education history in the online form provided.	Job application	Must Have ● ● ●
Attach Resume	I, the candidate, will click a button to open a view that allows me to browse my files and upload my resume or curriculum vitae.	Job application	Must Have ● ● ●
Search duplicate cases	I, the system, will automatically search for duplicate entries for the same candidate and position selected.	Job application	Must Have ● ● ●
Application Received	I, the system, will automatically send an email to the candidate to inform them their job application has been received. (Email content yet to be determined)	Job application	Must Have ● ● ●

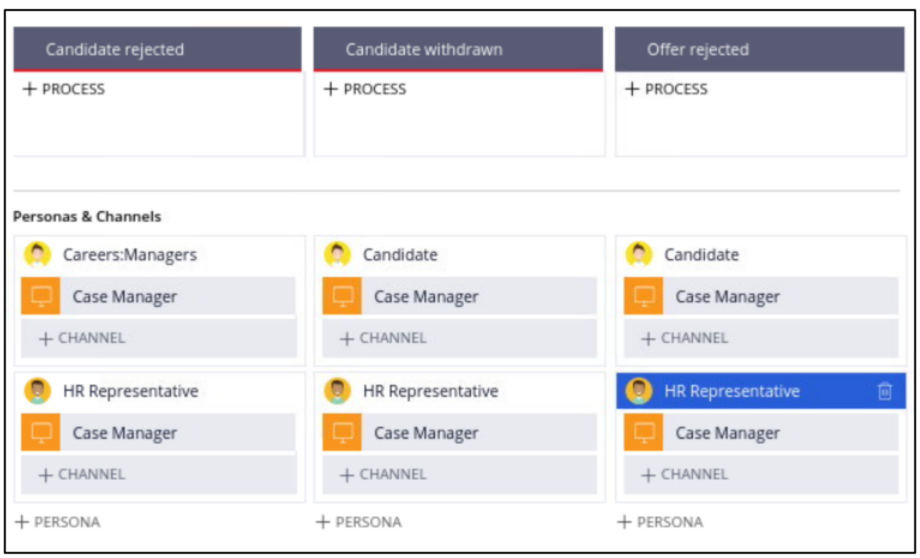
Task 6: Verify your work

Your Career Candidate case type workflow's primary and alternate stages with associated personas and data should appear like the following images:

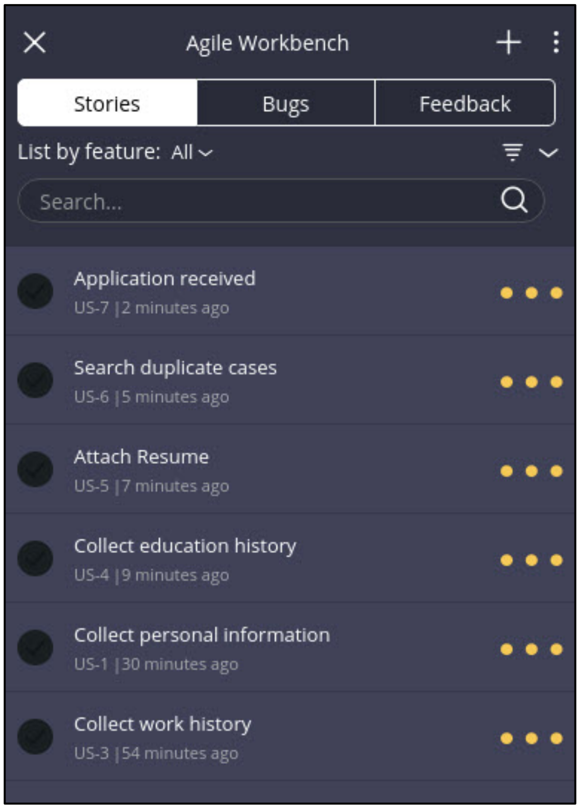
Primary Stages:



Alternate Stages:

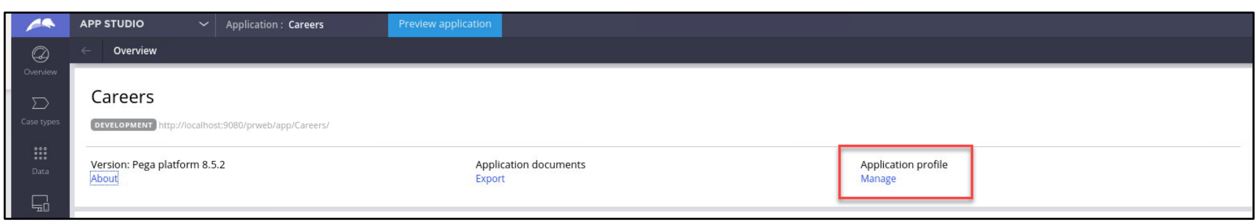


The Agile Workbench now lists 6 stories, sorted alphabetically by name, not story number (US-##).

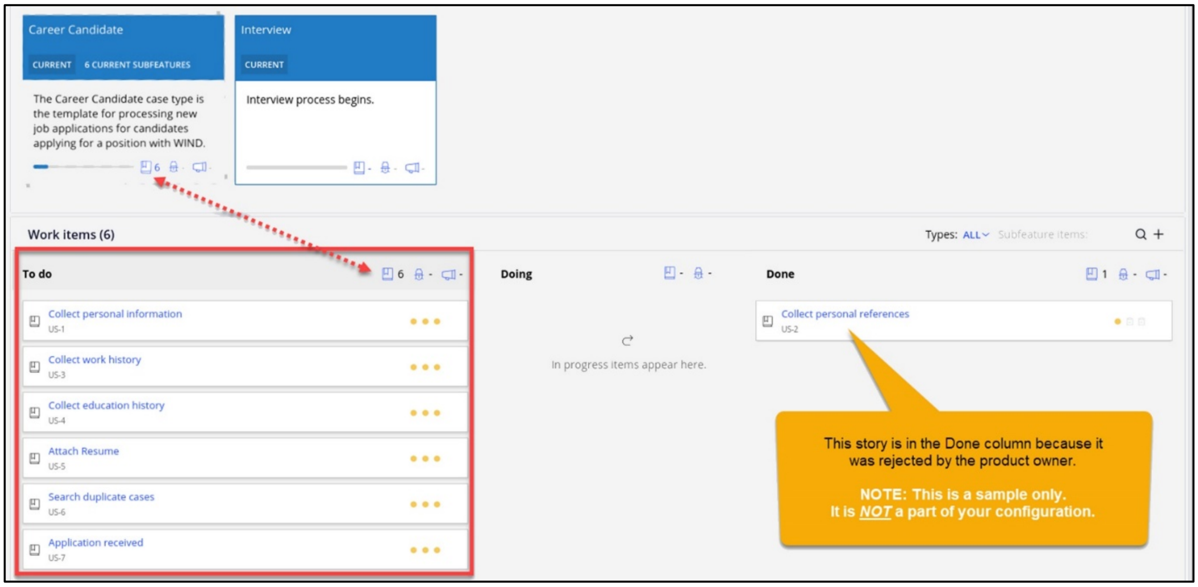


NOTE: Your story numbers and names may be different from the image above.

1. In APP STUDIO, select the **Overview explorer** in the upper-left corner.
2. Select Application profile **Manage**.



3. Select the **Feature map** tab to display the features and work items.

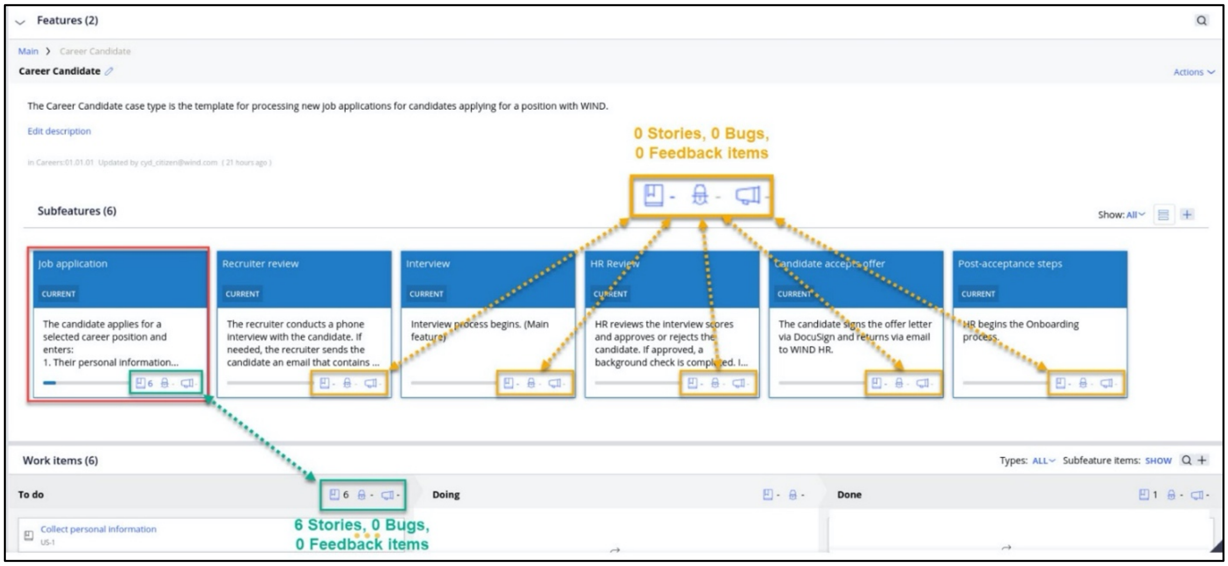


NOTE: The image above displays 6 story work items related to Career Candidate in the To do column. Work items in the To do column are waiting to be assigned to system and business architects for elaboration and construction.

The Collect personal references story in the Done column was not a part of your configuration. It is a sample of a story that was rejected by the product owner and marked for "future" consideration (one dot).

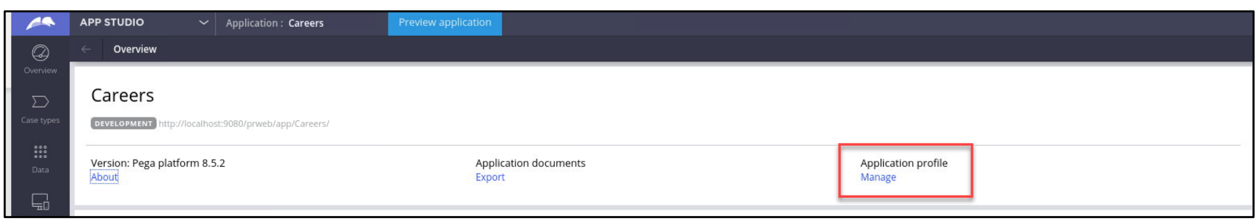
4. Drill down to the sub-features associated with the Career Candidate main feature by clicking on the **Career Candidate** tile header.

5. The Career Candidate's main feature has 6 sub-features. All the stories entered are now aligned to the Job applicant sub-feature. The smaller icons in the bottom-right of each feature tile indicate the cardinality and relationship of associated work items (number of stories, bugs, and feedback items).

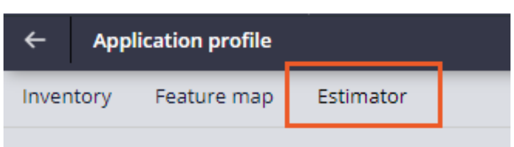


Task 7: Size your project

1. In the navigation pane of App Studio, click **Overview**.
2. Click **Manage** under Application profile at the top of the Overview landing page.

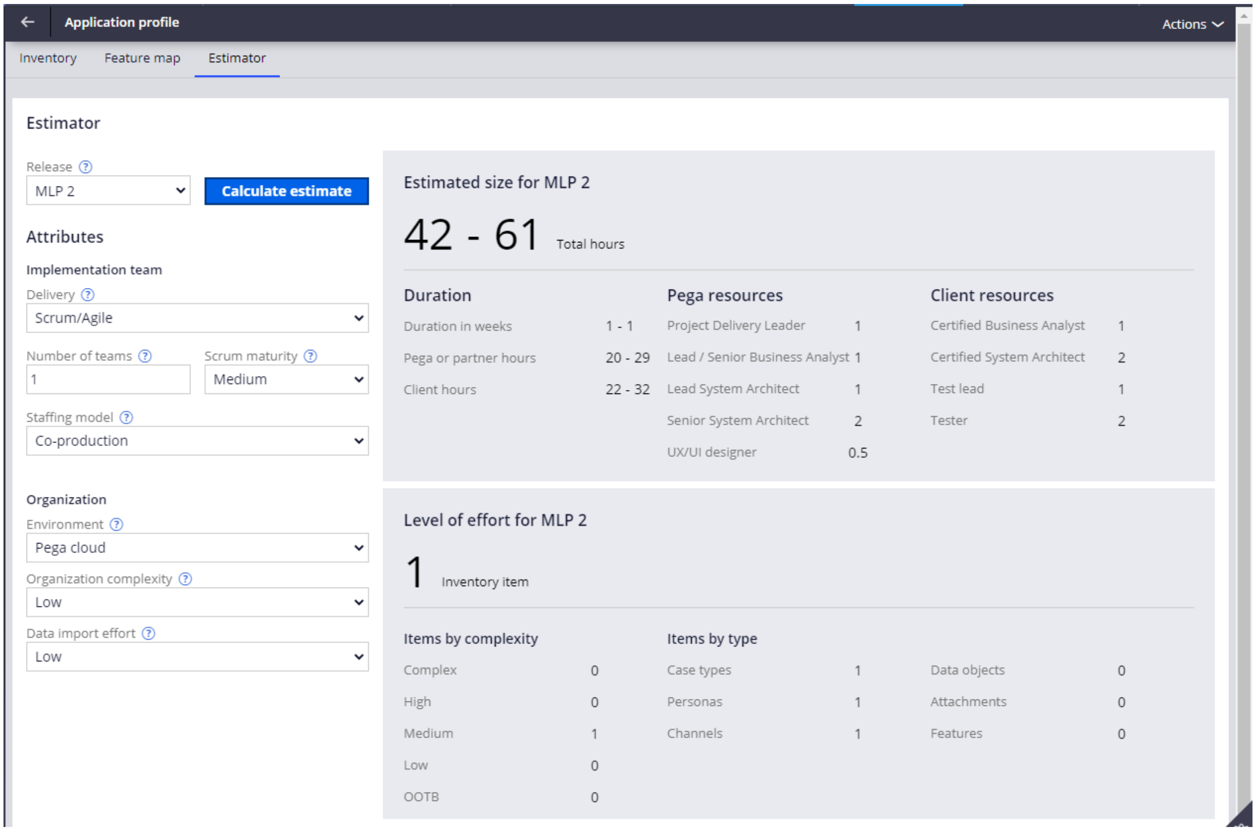


3. Click the **Estimator** tab.



4. In the **Release** list, select **MLP 2**.
5. In the **Delivery** list, select **Scrum/Agile**.
6. In the **Number of teams** field, enter **1**.
7. In the **Scrum maturity** list, select **Medium**.
8. In the **Staffing model** list, select **Co-production**.
9. In the **Environment** list, select **Pega cloud**.

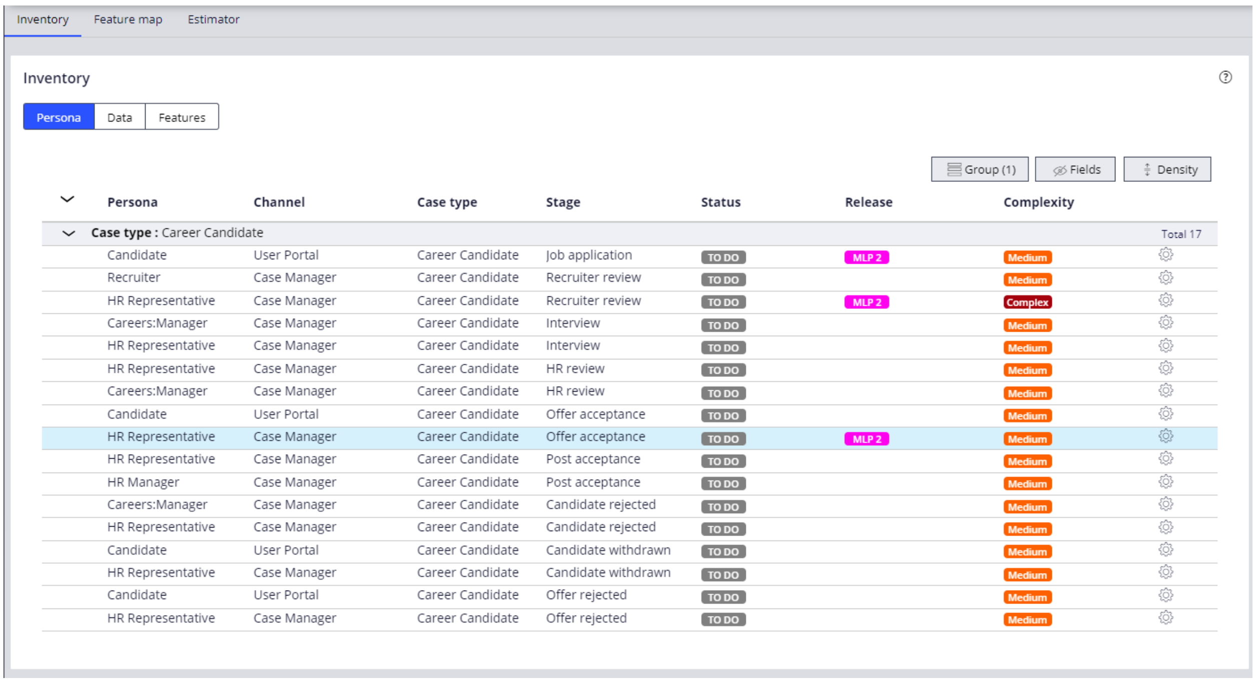
10. In the **Organization complexity** list, select **Low**.
11. In the **Data import effort** list, select **Low**.
12. Click **Calculate estimate** to view the estimated size for all the releases.

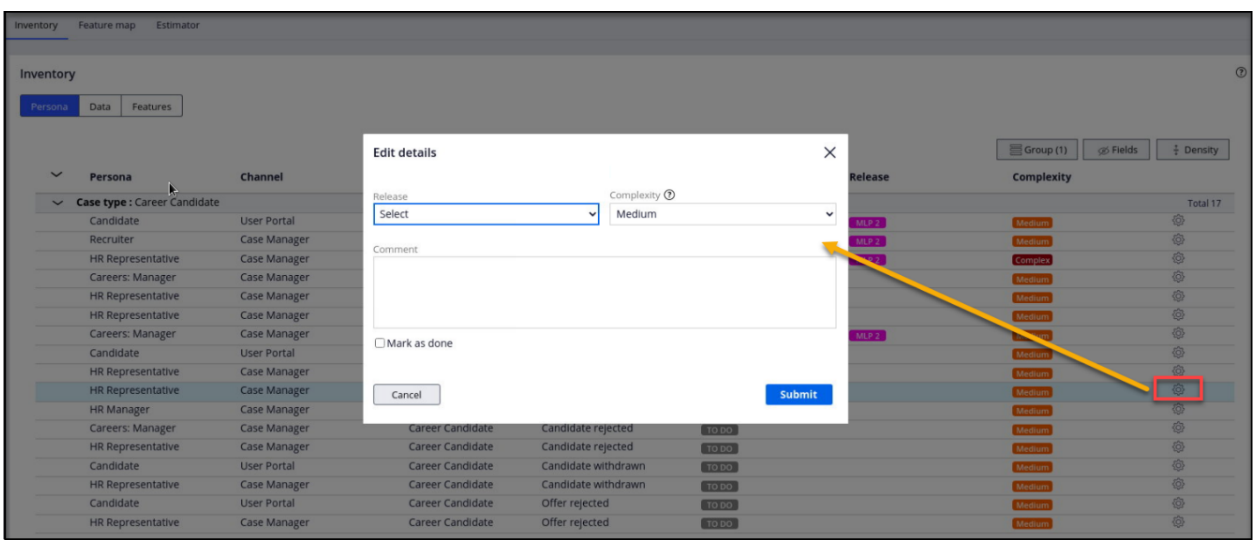


> **NOTE:** The sizing will change based on the items in inventory planned for MLP 2 and the complexity.

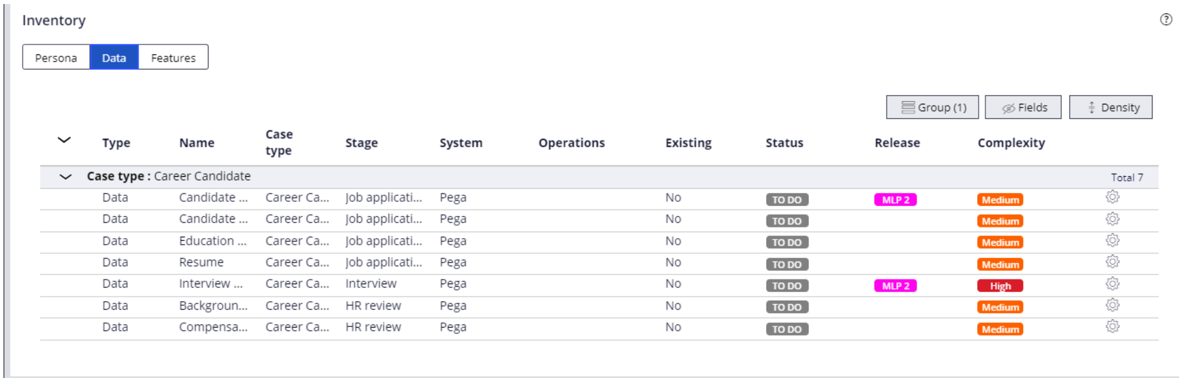
13. Change some of the features in the Inventory tab, Persona, Data, Features and calculate the estimate again. You will see the effort change.

14. Click on the **Inventory** tab. Select any row and click on the **gear** icon on the right-hand side. Clicking the gear icon will open a window that allows you to change the Release, Complexity, description or you can mark it done.

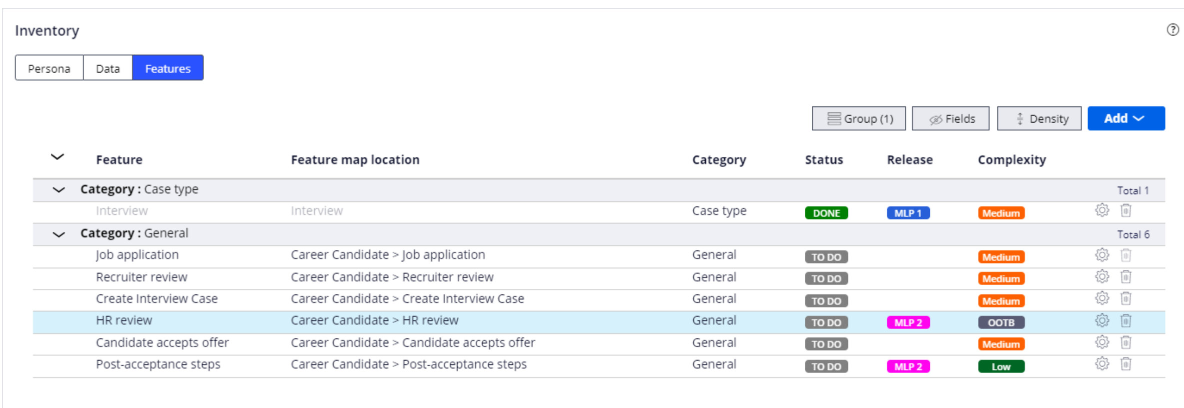




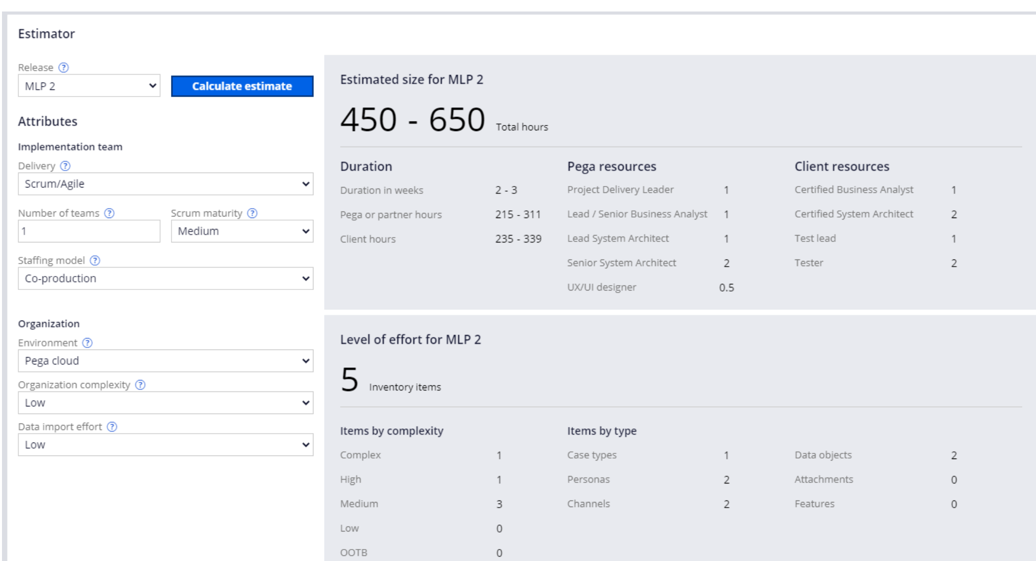
15. Click on the **Data** tab; select any row and click on the gear icon to change the Release, complexity, description or mark it done for that Data type.



16. Click on the **Features** tab and repeat the same process to change the complexity or release of any feature (select a feature and click the gear icon).



17. Click **Estimator** tab at the top. Click **Actions > Refresh** to refresh the estimator results.



Log Off.

Case Management

Service Level Agreements

Scenario

Mobile+ has been seeing a delay in the time it takes to allot a new connection. They have requested a Service Level Agreement be added to the Allot Connection step.

Use the following credentials to log in to the exercise system:

Role	Username	Password
	author@slac	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development

Log in to the exercise

Task 2: Configure a goal and deadline for an assignment step

Add a Service level agreement to an assignment step

Task 3: Configure a goal and deadline for the case

Add a Service level agreement to the case

Task 4: Verify the work

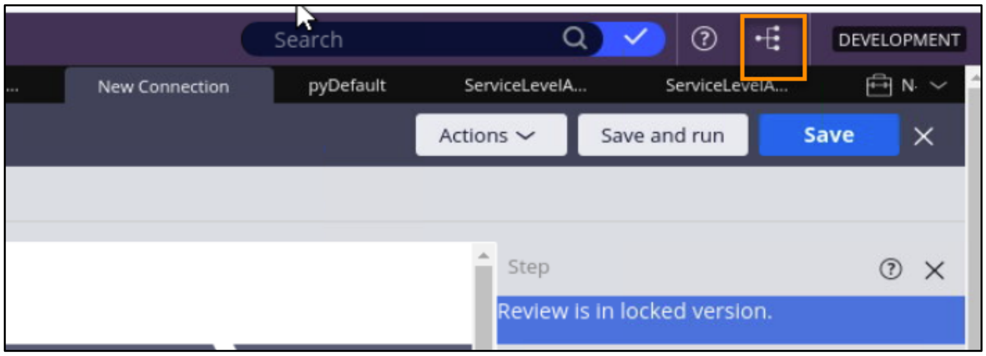
Run the case type and verify the changes

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

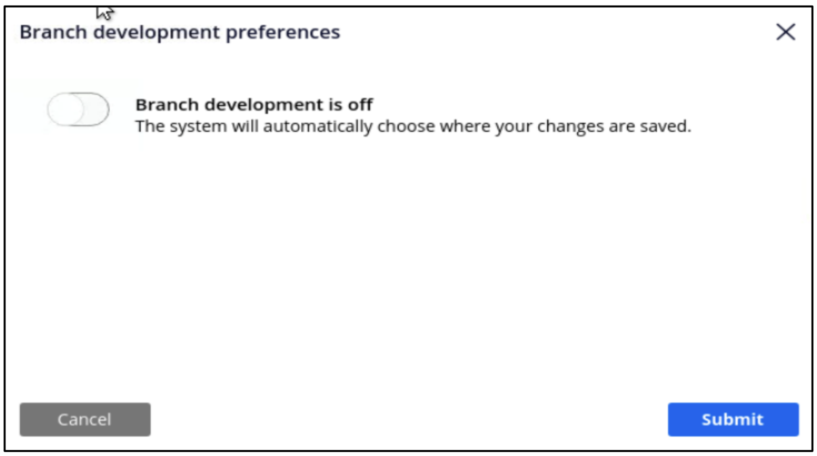
Detailed Steps

Task 1: Login and enable branch development

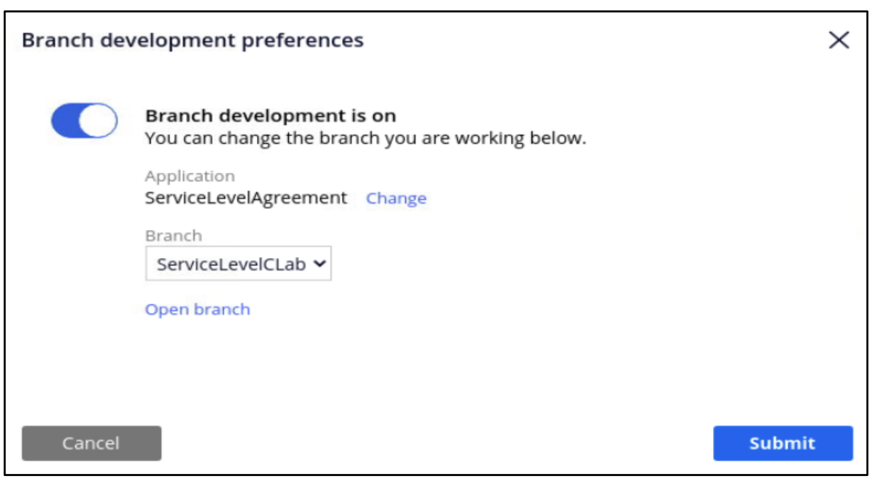
1. Open the exercise system.
2. Log in using the credentials **author@slac** and **rules.**
3. From the title bar click the **Toggle branch development** button.



The following appears:



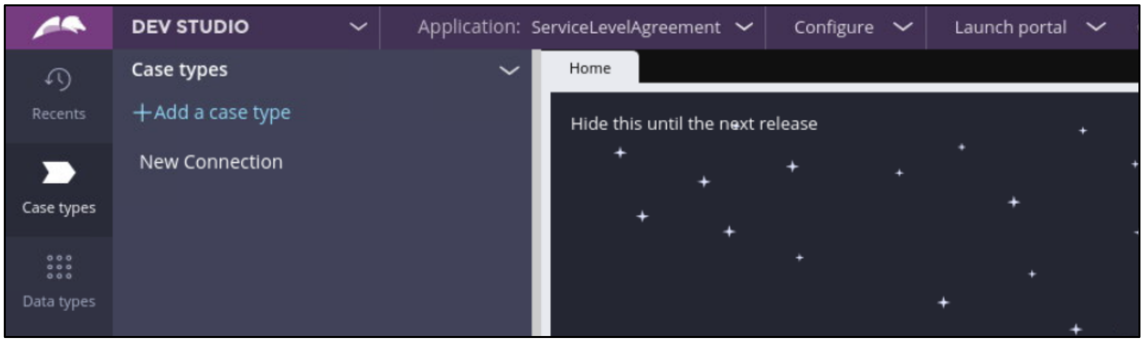
4. Move the slider to turn branch development on.
5. From the **Branch** dropdown ensure that **ServiceLevelCLab** is selected and click **Submit**.



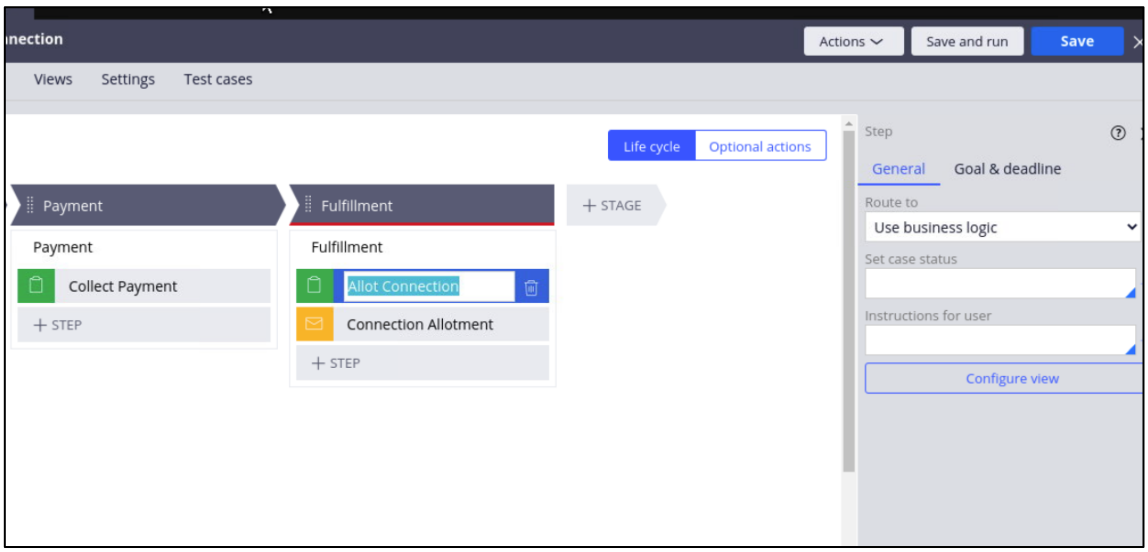
Task 2: Configure a goal and deadline for an assignment step

Attach and configure a SLA for an assignment step.

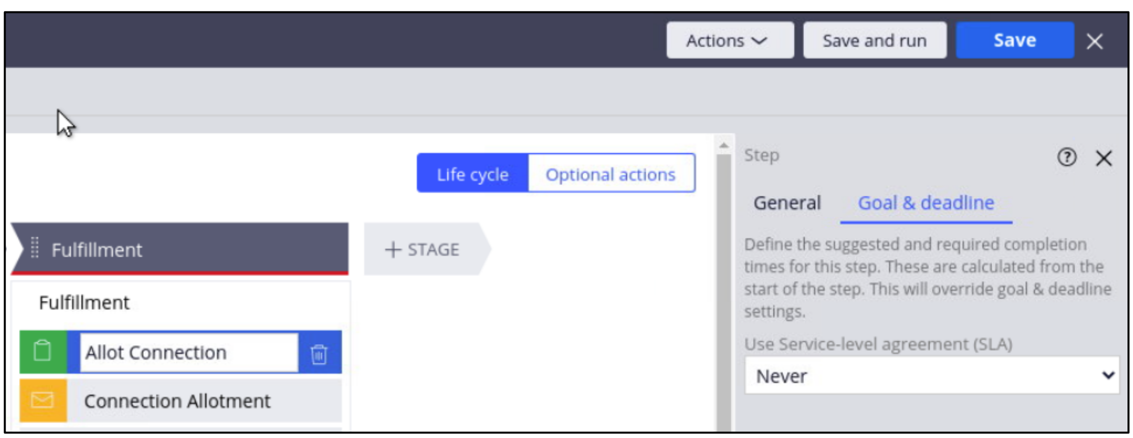
1. Select **Case Types > New Connection**.



2. In the **Fulfillment** process click the **Allot Connection** step.

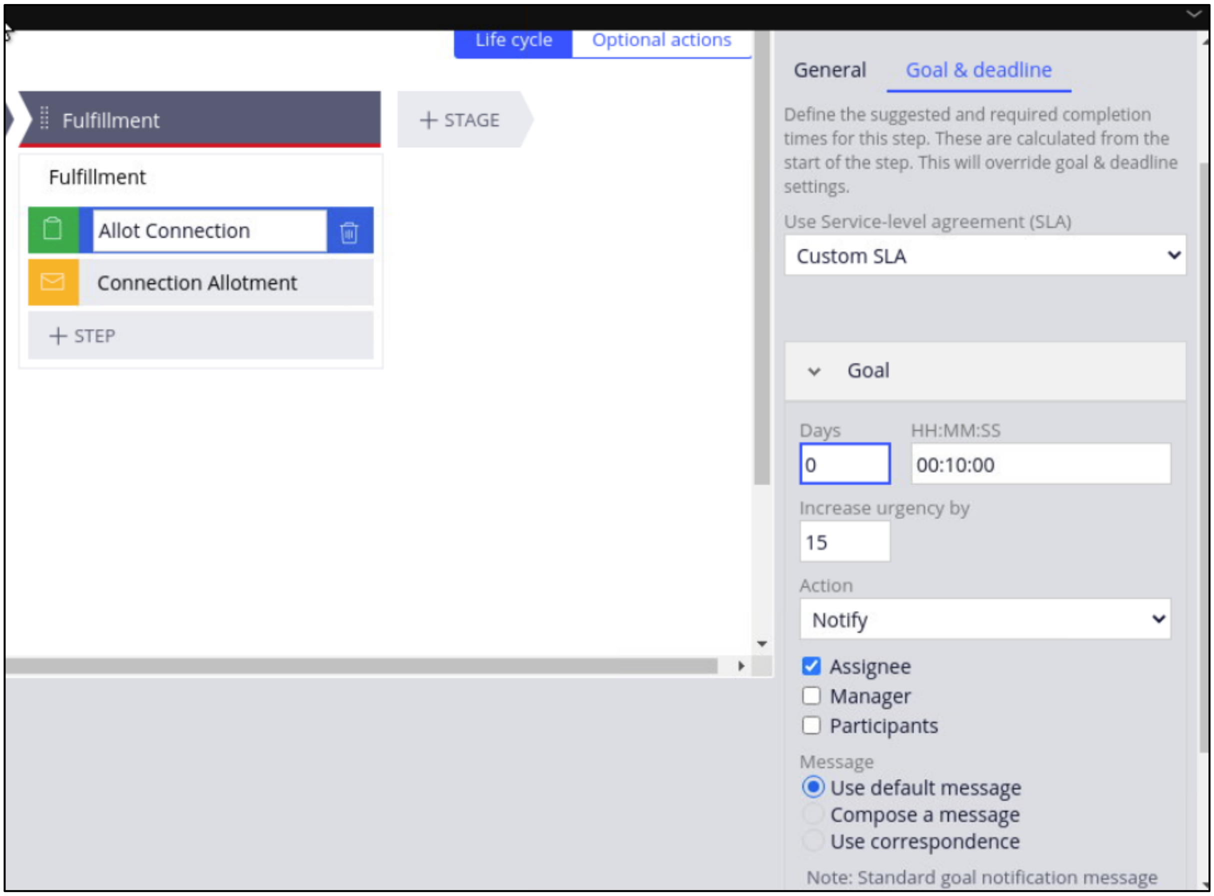


3. In the right context menu select the **Goal & deadline** tab.

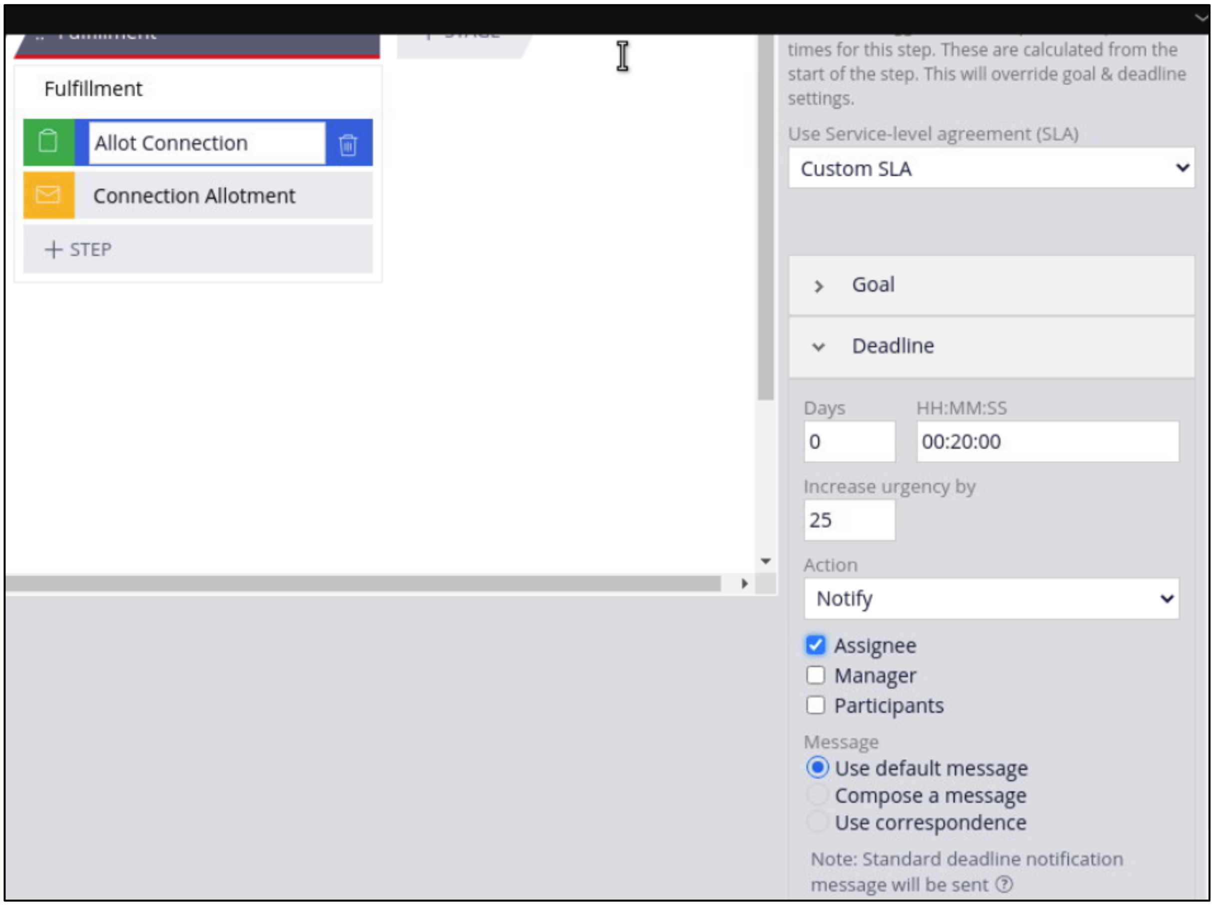


4. From the **Use Service-level agreement (SLA)** drop-down, select **Custom SLA** to display the SLA configuration settings.
5. Under **Goal**, in the **Days** field, enter **0**.
6. In the **HH:MM:SS** field, enter **00:10:00**.
7. In the **Increase urgency by** field, enter **15**.

8. Under the **Action** drop-down, select the **Assignee** check box to send a message to the assignee.



9. Scroll down and Click **Deadline** to expand the deadline settings.
10. Under **Deadline**, in the **Days** field, enter **0**.
11. In the **HH:MM:SS** field, enter **00:20:00**.
12. In the **Increase urgency by** field, enter **25**.
13. Under the **Action** drop-down, select the **Assignee** check box to send a message to the assignee.

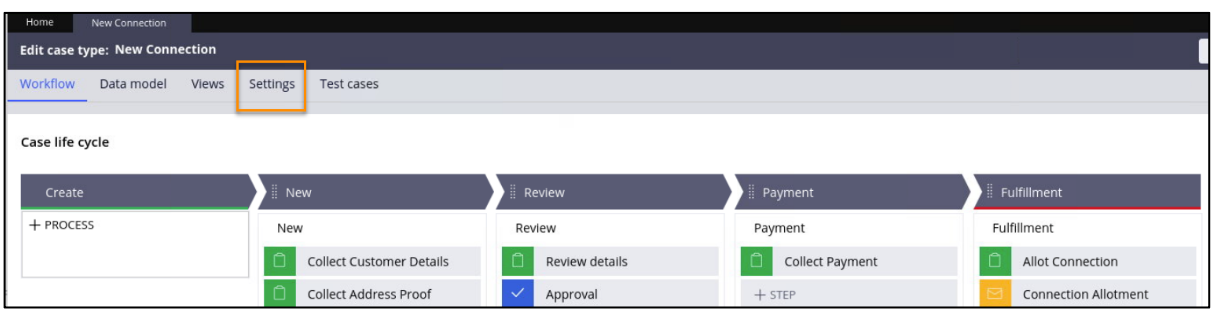


14. Click **Save** to save the configuration of the service level agreement.

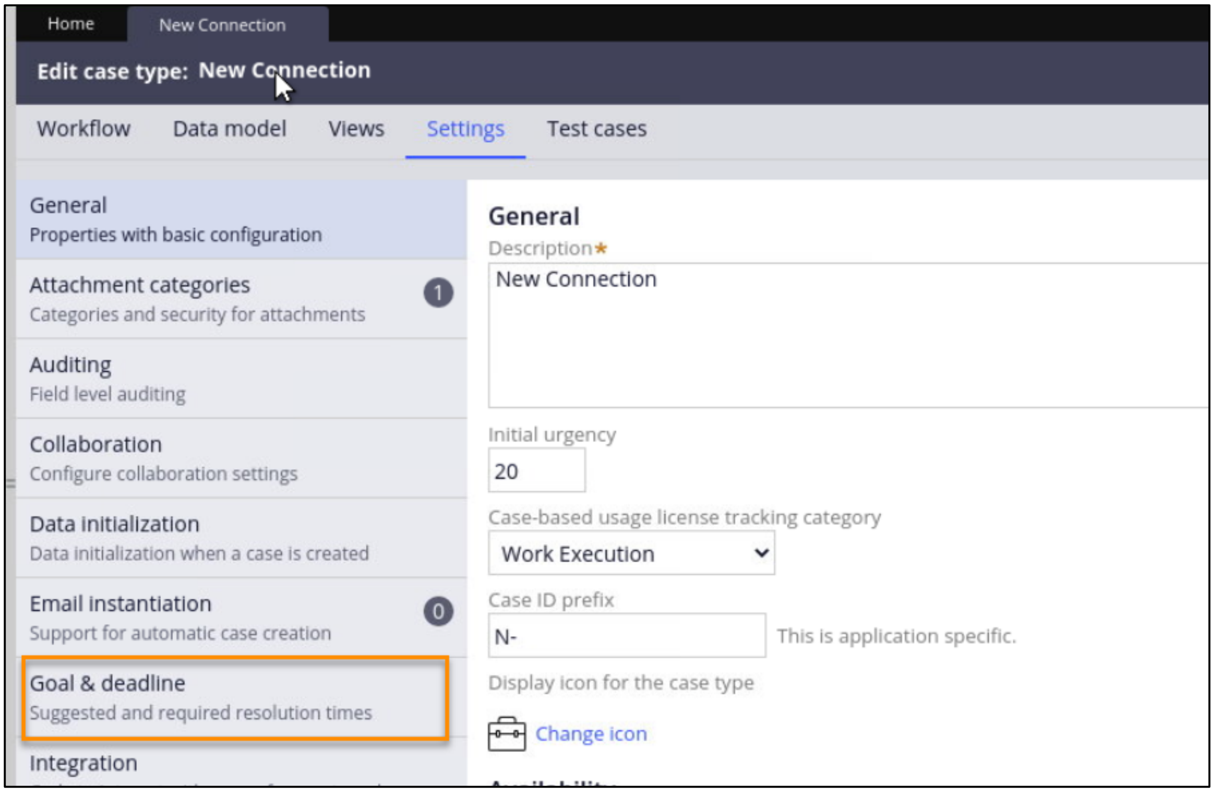
Task 3: Configure a goal and deadline for the case

Configure a case-level SLA.

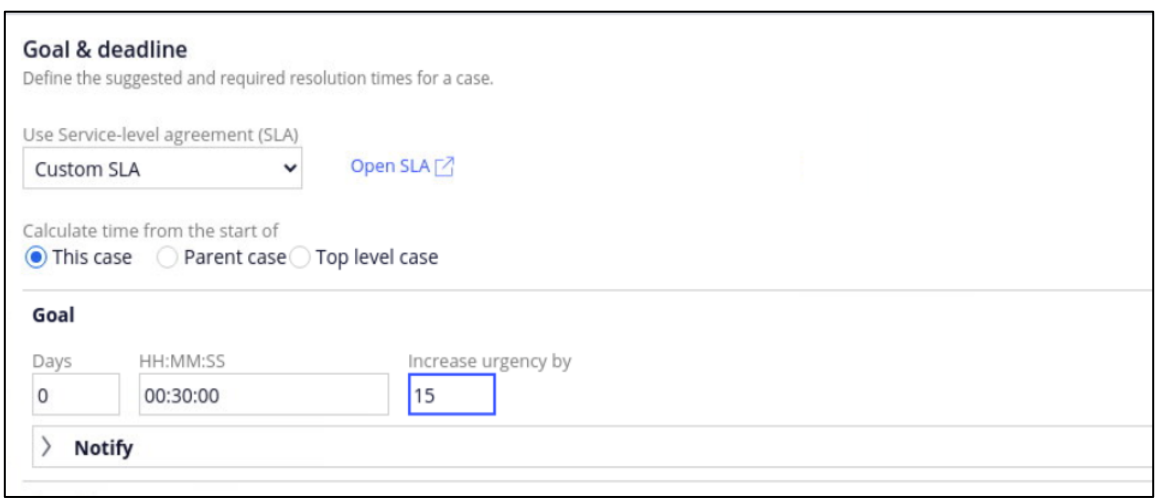
1. Select the **Settings** tab from the Case Type view.



2. Select **Goal & Deadline** from the left side menu.

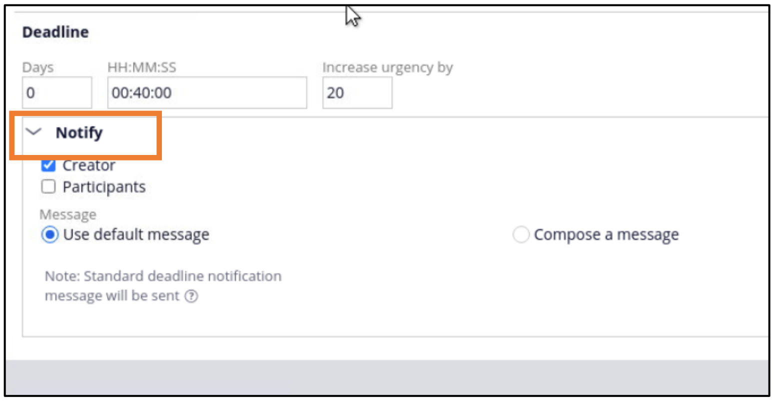


3. From the **Use Service-level agreement (SLA)** drop-down, select **Custom SLA** to display the SLA configuration settings.
4. Under **Goal**, in the **Days** field, enter **0**.
5. In the **HH:MM:SS** field, enter **00:30:00**.
6. In the **Increase urgency by** field, enter **15**.



7. Under **Deadline**, in the **Days** field, enter **0**.
8. In the **HH:MM:SS** field, enter **00:40:00**.
9. In the **Increase urgency by** field, enter **20**.

10. In the **Deadline** section click the arrow next to **Notify** to expand the notification options.

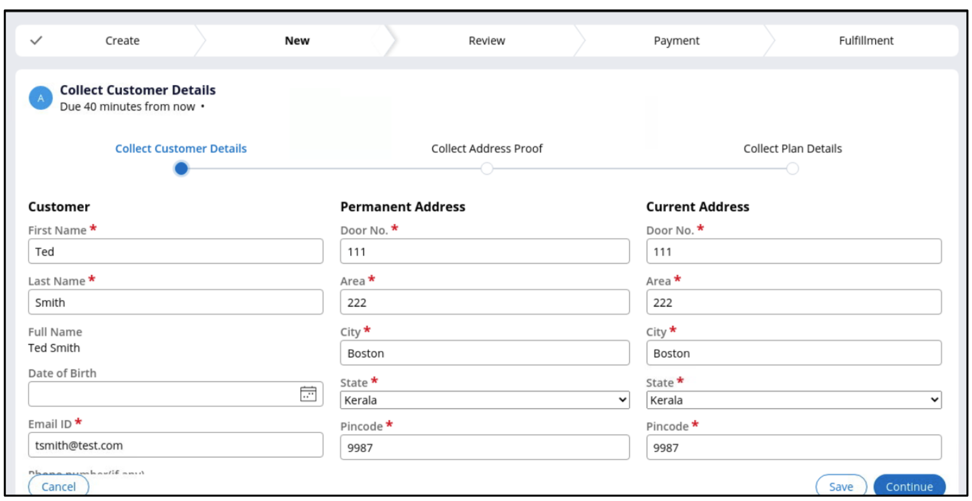


11. Check the box next to **Creator.**

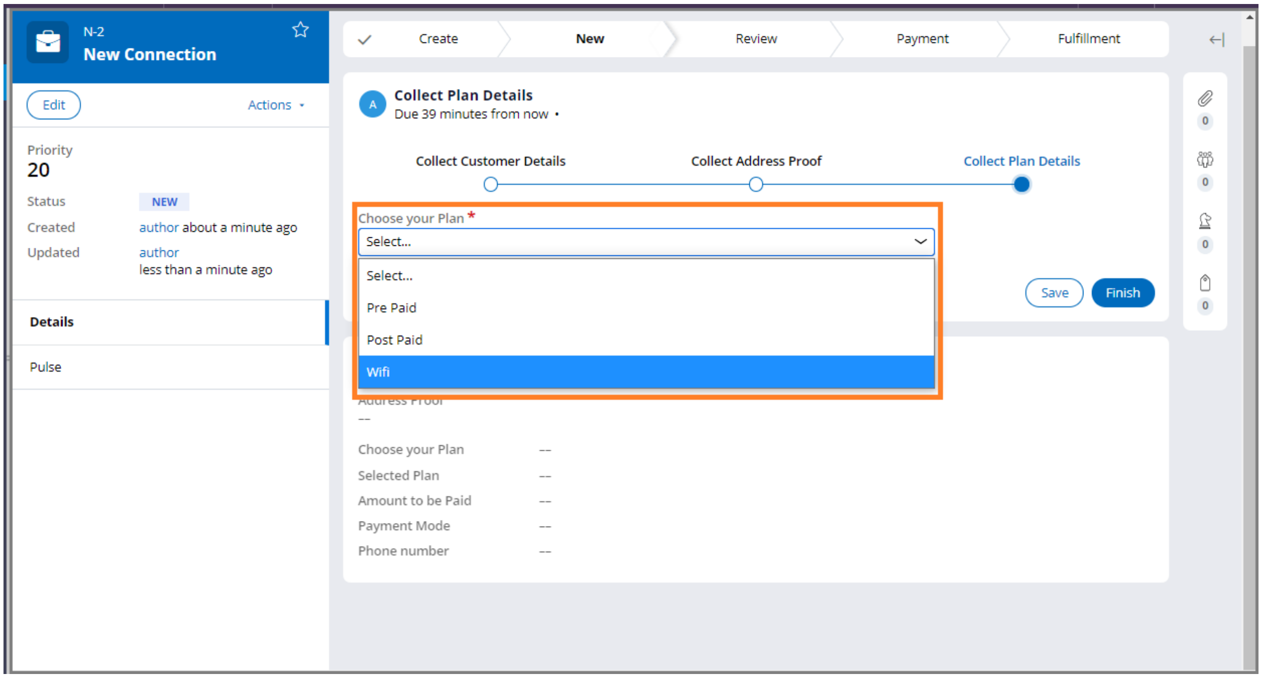
12. **Save.**

Task 4: Verify your work

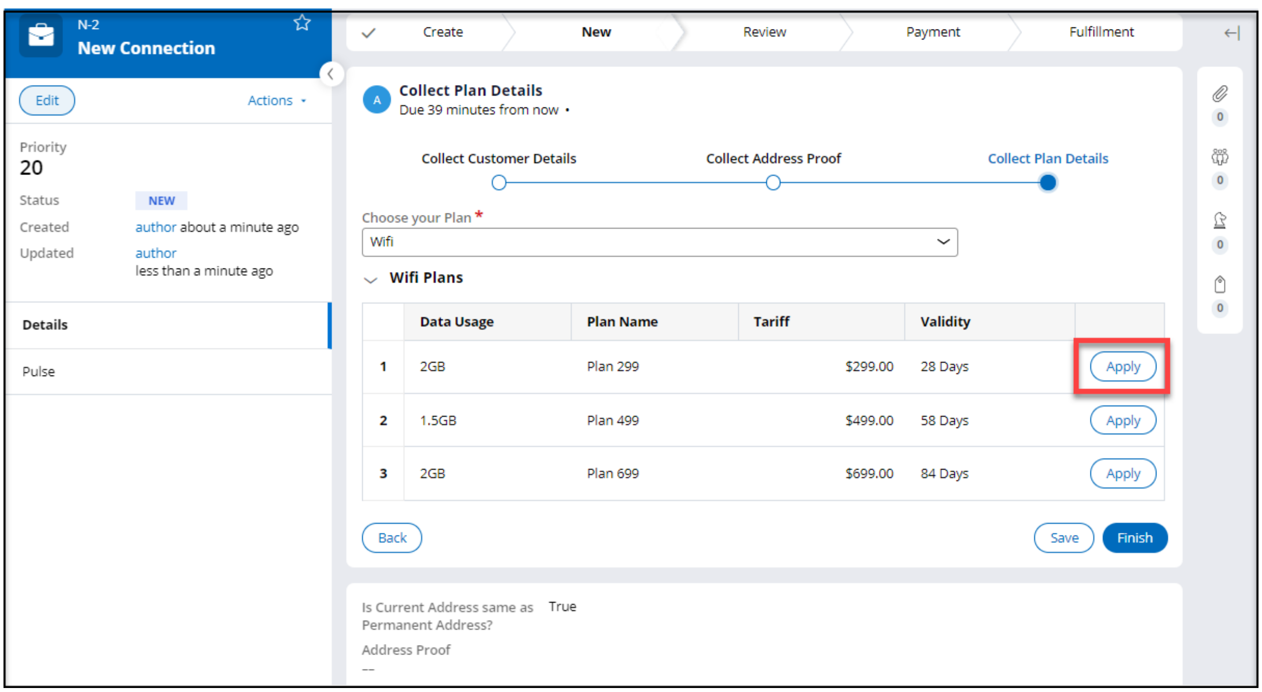
1. Click **Save and run.**
2. Check the "Is Current Address same as Permanent Address?" check box. Click **continue.**
3. Click **continue** in Collect Address Proof.



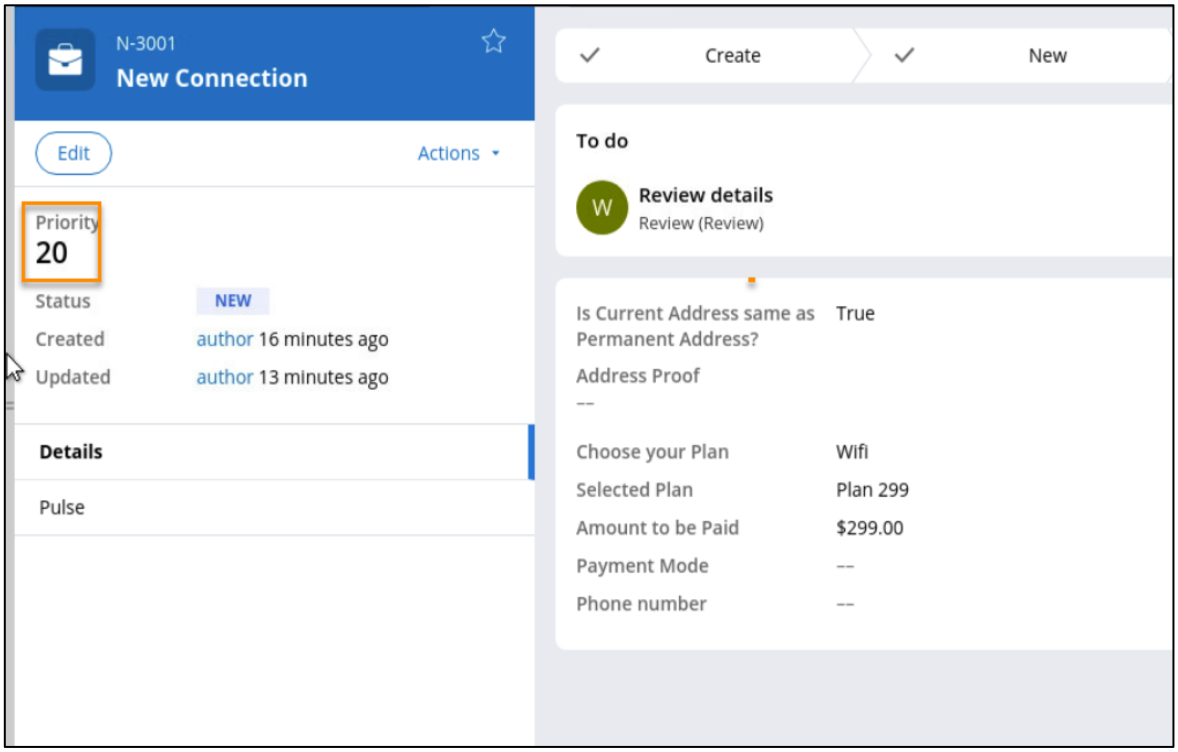
4. Choose the **Wifi** plan.



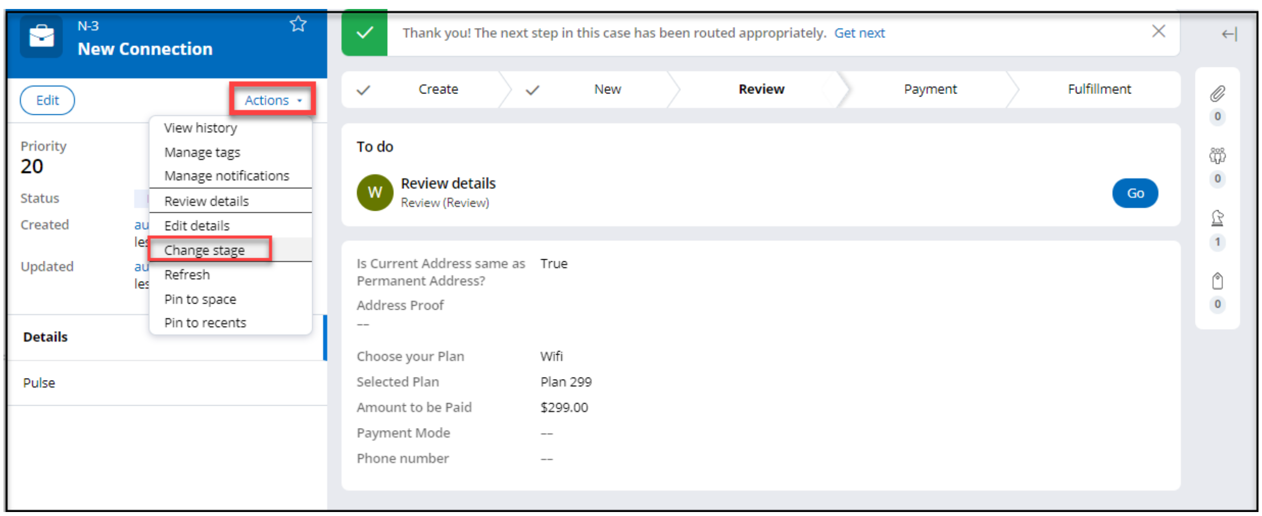
5. Select **Plan 299** by clicking **Apply** in the correct row



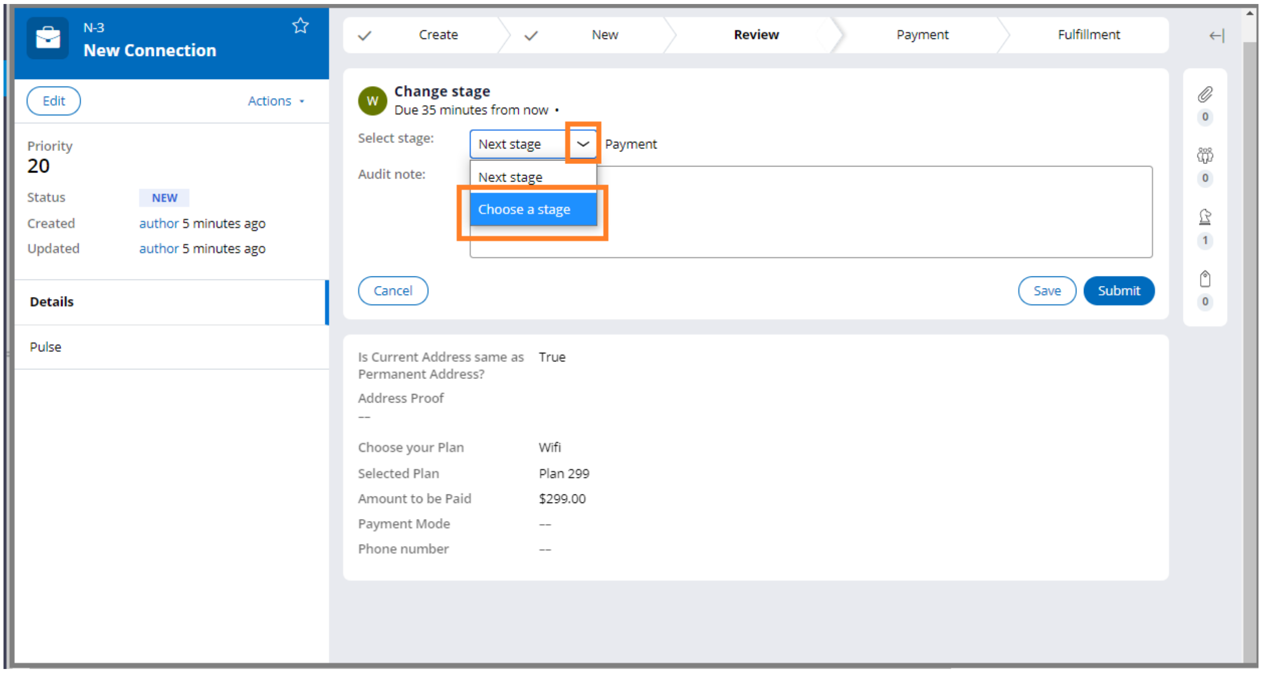
6. Click **Finish.**
7. In the **Case Details** section, the Case **urgency** is displayed.



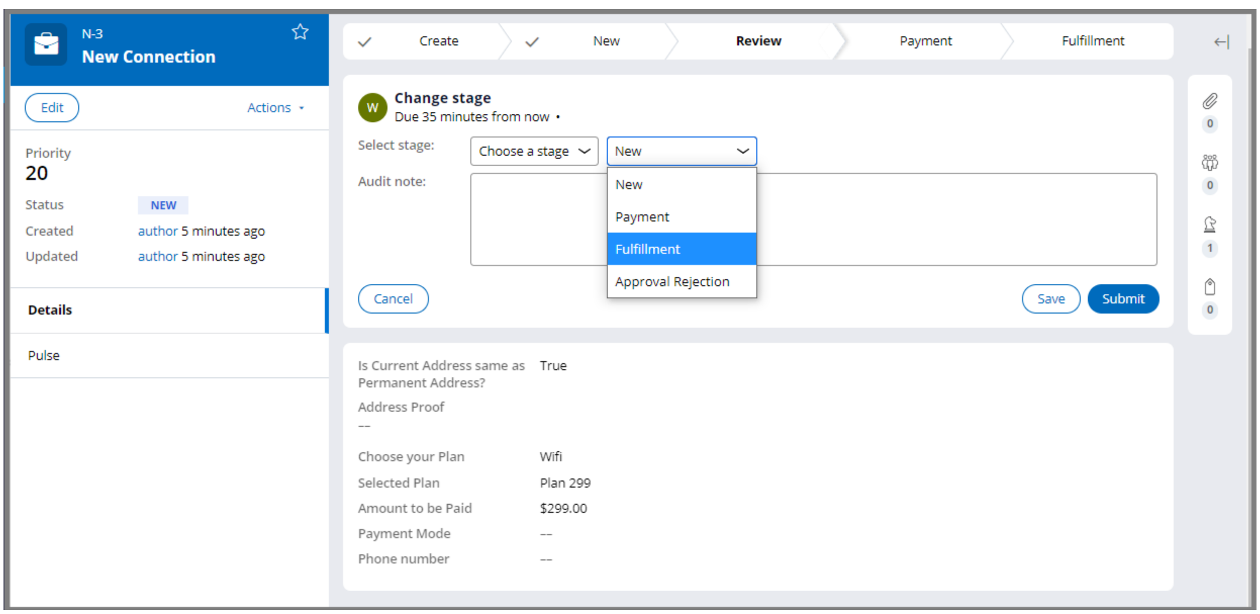
8. Click **Actions** > **Change stage**.



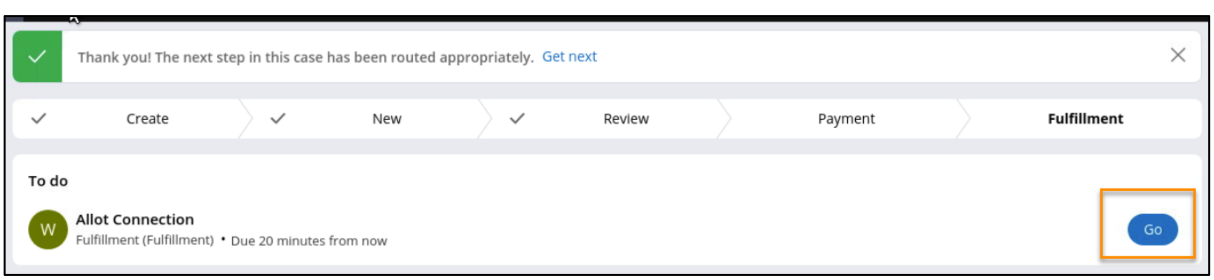
9. From the Select stage drop down, select **Choose a stage.**



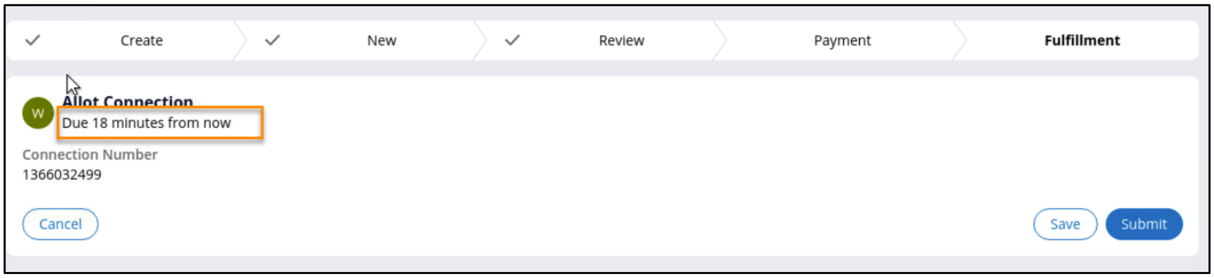
10. Select **Fulfillment** and click **Submit**.



11. The Allot Connection screen is displayed. Click **Go**.



12. The view shows the **Deadline** time remaining for the **Assignment level SLA**.



NOTE: The **Deadline** time is shown under the Step name.

Log Off.

Create Child Case

Scenario

OneAuto wants to add a Residual Value (RV) calculation to their vehicle selling case type. Other developers have created a case type for the RV calculation. You are tasked with including it into the vehicle selling process.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Administrator	admin@childcase	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development

Log in to the development environment and enable branching

Task 2: Add the RV Calculation Case type to the Evaluate and Sell a Vehicle Case type

Use the Create Case step to use the RV Calculation case type

Task 3: Verify your work

Run a case and confirm the creation of a child case

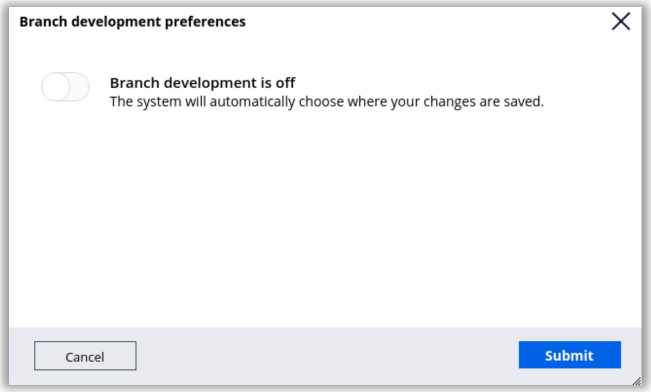
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

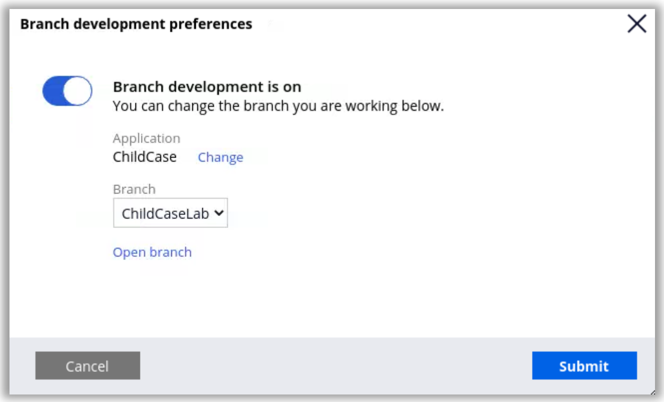
Task 1: Log in and enable branch development

1. Log in and use the credentials **admin@childcase** and **rules**.
2. From the title bar click the **Toggle branch development** button.

3. The following appears:



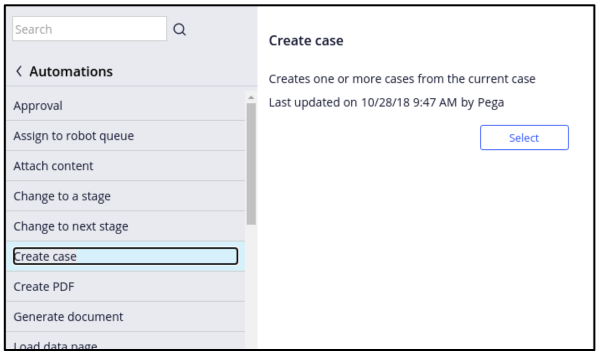
4. Move the slider to turn **Branch development** on.
5. From the **Branch** dropdown ensure that **ChildCaseLab** is selected and click **Submit**.



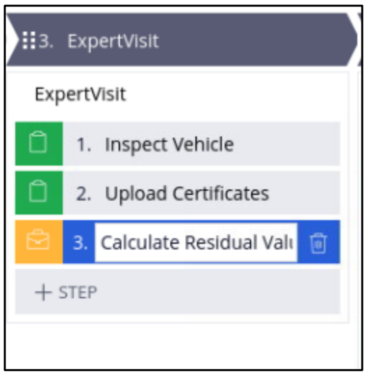
Task 2: Add the RV Calculation case type to the Evaluate and Sell a Vehicle case type

1. In **Dev Studio,** click **Case Types > Evaluate and Sell a Vehicle**.
2. Add a step to the **ExpertVisit** process.

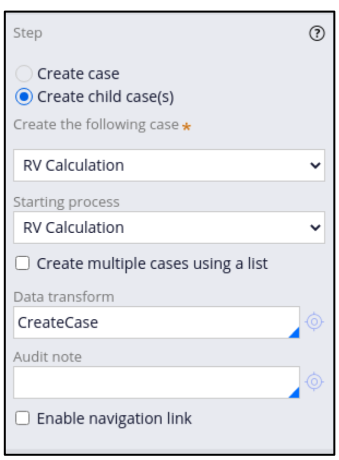
3. Click **+Step > More > Automations > Create Case > Select**.



a. Name the Create Case step **Calculate Residual Value.**

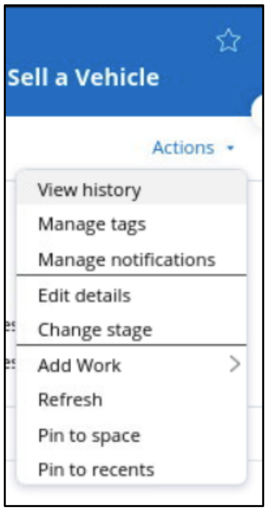


4. In the context menu configure the Create Case step **Calculate Residual Value.**
   a. Select the **Create child case(s)** radio button.
   b. Select **RV Calculation** from the **Create the following case** dropdown.
   c. In the field for Data Transform input **CreateCase**.
   d. Click **Save**.

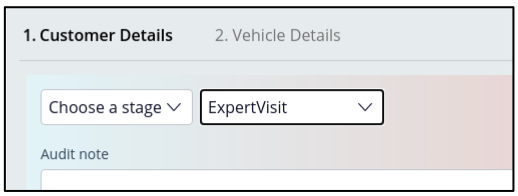


Task 3: Verify Work

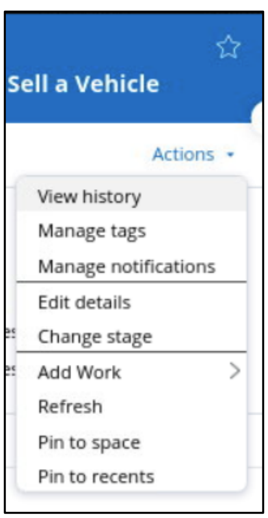
1. Click **Save and Run** to run an instance of the case.
2. From the **Actions** menu select **Change Stage**.

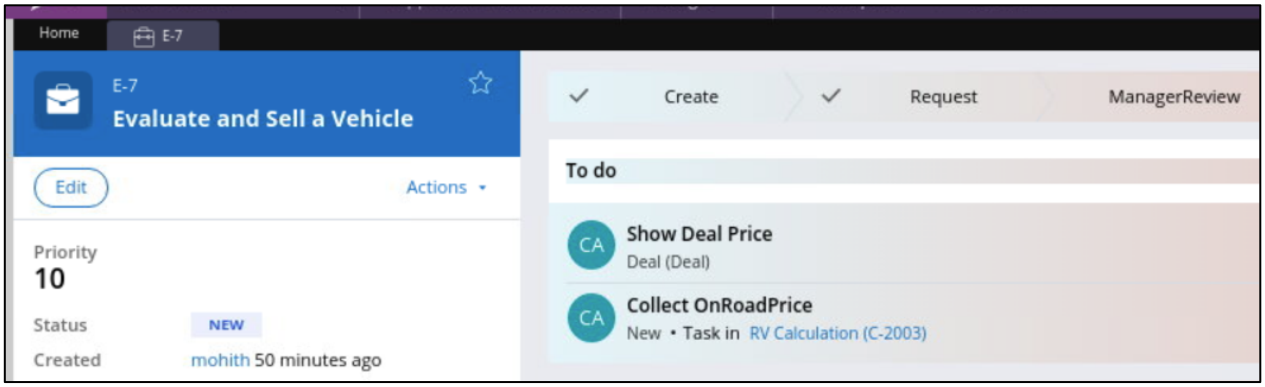


3. Select **Choose a stage**. Choose **ExpertVisit**. Click **Submit**.



4. Click on the **Go** button to open the approval assignment.
5. Click **Approve**.
6. No need to upload the certificates, just click **Submit**.
7. The case creates the **RV Calculation** case and proceeds to the **Deal** process. The **Open assignments** show both cases types are open. From the **Actions** menu, select **Refresh** which is going to refresh the case and display the open assignments.





NOTE: To enforce the parent/child dependency complete the steps in the Wait Step mini lab.

Wait Step

Scenario

One Auto is in the process of adding a Residual Value (RV) calculation to their car selling process. Developers have created a case type for calculating the RV. The RV case type needs to be completed before the car selling process can continue. To complete the story, you have been tasked with creating this dependency.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	author@ws	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development

Login into the system.

Task 2: Add Wait Step

Add a wait step to enforce parent child dependency.

Task 3: Verify your work

Run a case to verify case dependency

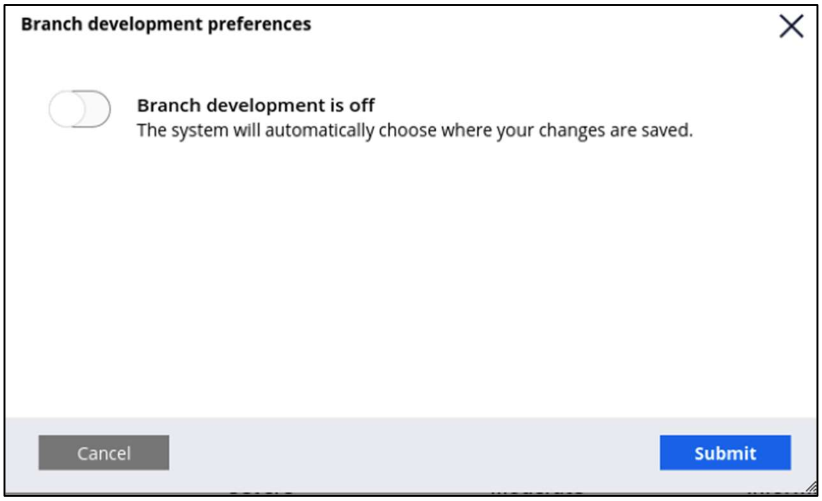
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

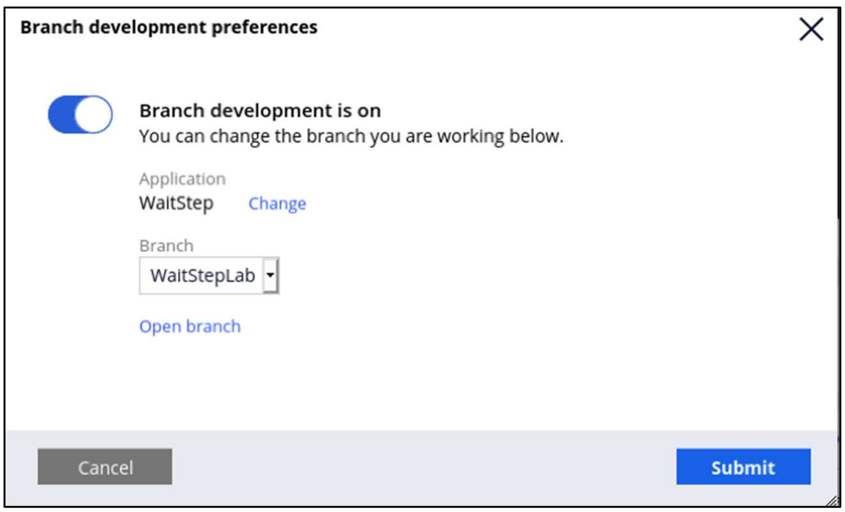
Task 1: Login and enable branch development

1. Log in using the credentials ***author@ws*** and ***rules***.
2. From the title bar click the **Toggle branch development** button.

The following appears.



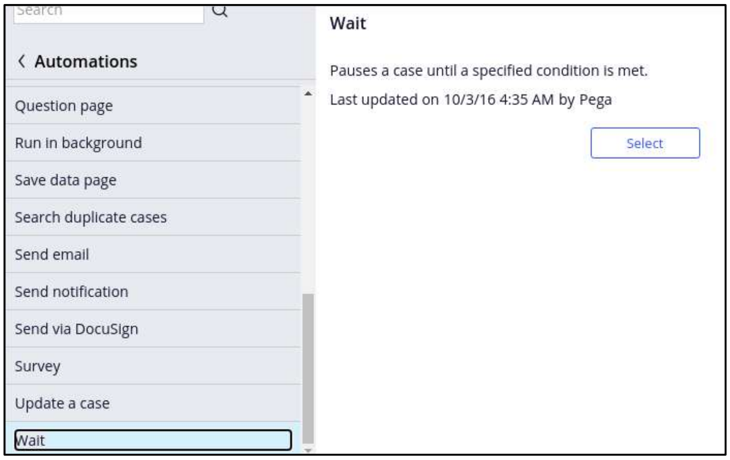
3. Move the slider to turn branch development on.
4. From the **Branch** dropdown ensure that **WaitStepLab** is selected and click **Submit**.



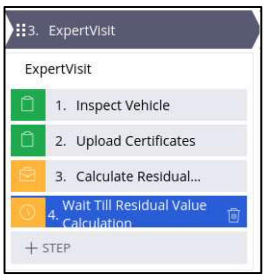
Task 2: Add Wait Step

1. Open Dev Studio.
2. Select **Case Types > Evaluate and Sell a Vehicle**
3. In the **ExpertVisit** process add a step.

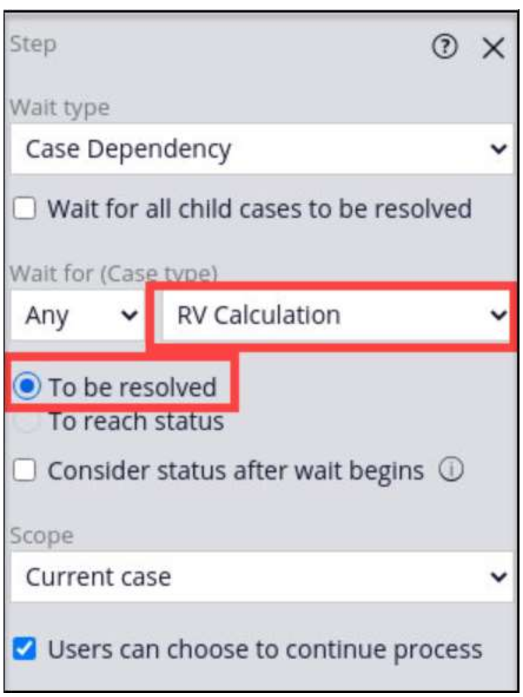
4. **+Step > More > Automations > Wait > Select**.



5. Change the Name of the **Wait Step** to “Wait Till Residual Value Calculation”.



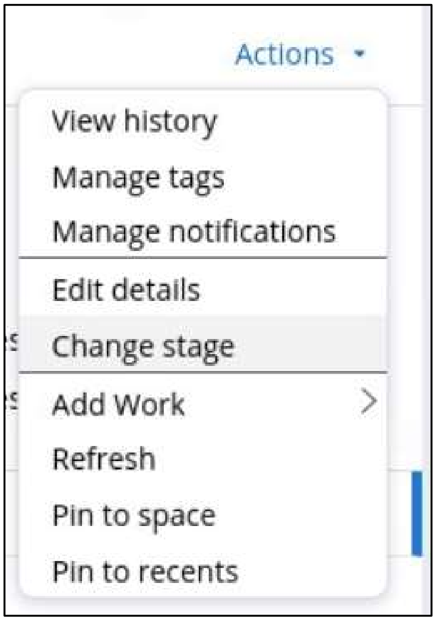
6. In the context menu change the **Wait for (case type)** drop down to **RV Calculation**. Select the **To be resolved** radio button.



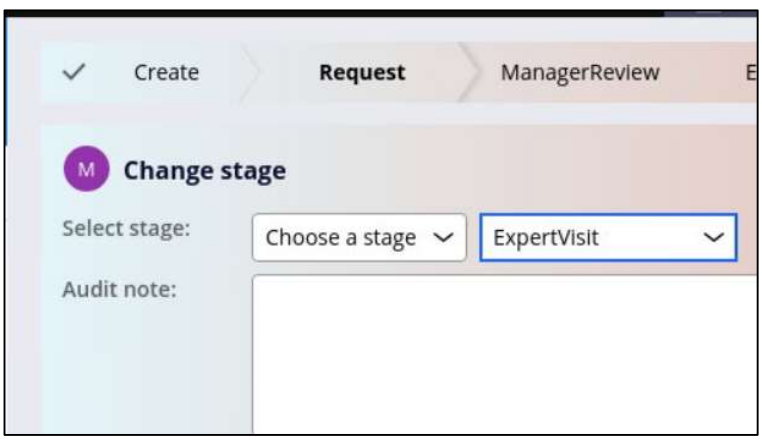
7. Click **Save**.

Task 3: Verify your Work

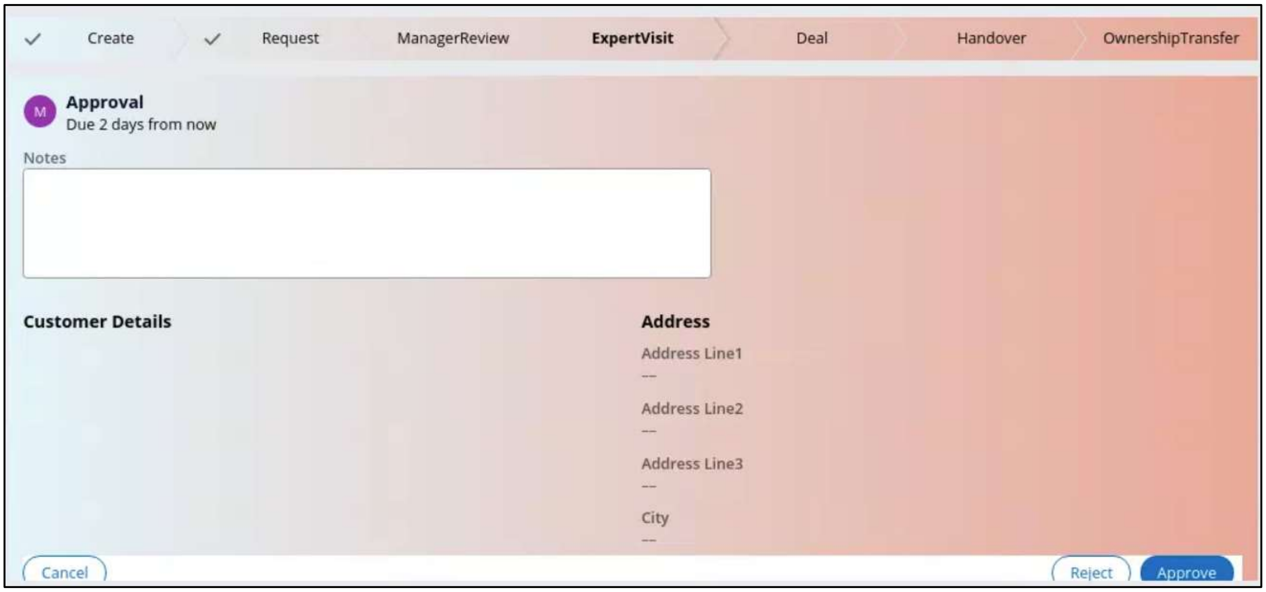
1. Click **Save and Run** to run an instance of the case.
2. From the Actions menu select **Change Stage**.



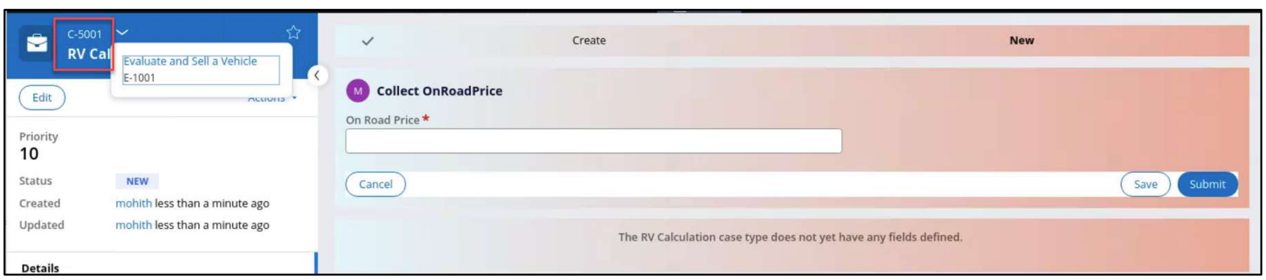
3. Select **Choose a Stage** from the drop down. Change stage to **ExpertVisit**.



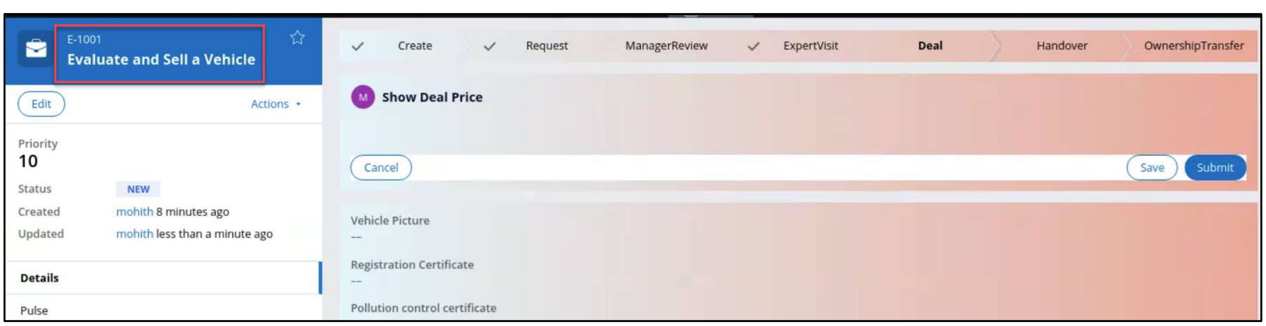
4. Click **Submit**.
5. Click **Go.**



6. Select **Approve**.
7. Click **Submit**.
8. The RV Calculation case type is now active. The parent case **Title** and **case ID** for *Evaluate and Sell a Vehicle* is displayed above the Name for the *RV Calcula*tion case type.



9. Enter **100** for the **On Road Price** and **Submit**.
10. Click **Submit** on the Show Purchase Date step.
11. Click **Submit** on the Residual Value step.
12. The *RV Calculation* child case is now **Resolved-Completed.**
13. The *Evaluate and Sell a Vehicle* parent case is now active again.



Process Design

Scenario

The Auto Application Case Life Cycle, Evaluate and Sell A Vehicle, has been defined, however upon review it is decided some process flows are missing. A process flow to do a VIN (Vehicle Identification Number) check for accident records needs to be added. This will run in parallel with the Deal process under the Deal stage. The other Process flow needs to be an alternate stage handling a vehicle that returns an issue with the VIN.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	Author@ProcessDesign	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login in and enable branch development

Enable branch development to allow modification and creation of cases.

Task 2: Add VIN Check Process Flow

Add the VIN check process flow called VIN Check to Evaluate and Sell a Vehicle

Task 3: Unit test by running the flow in draft mode

Run the case to see how a decision shape is presented in draft mode

Task 4: Add alternate Flow

Add the Alternate flow Stage and Flow called VIN Issue

Task 5: Add business logic to send case to alternate flow

Configure the business logic for when the VIN is invalid it is sent to the alternate flow for review.

Task 6: Verify when the VIN is invalid the case is sent to the alternate flow

Run the case to confirm you no longer see the decision shape presented in draft mode

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

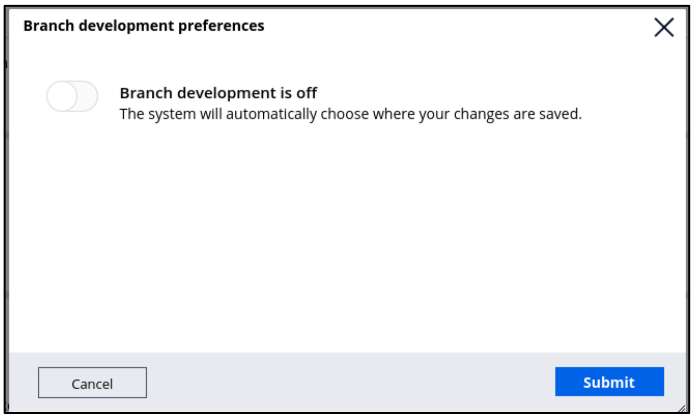
Detailed Steps

Note: All development needs to be done on Branch

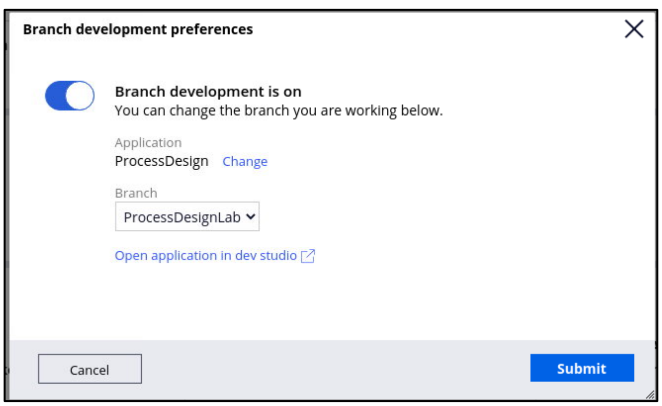
Task 1: Login and enable branch development

1. Log into Pega using the username **Author@ProcessDesign** and password of **rules**.
2. From the title bar, click the **Toggle branch development** button.

The following appears.

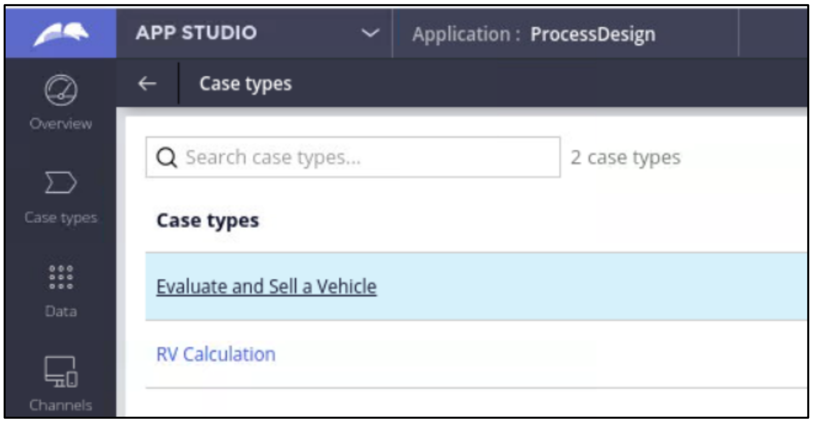


3. Move the slider to turn branch development on. From the **Branch** dropdown, ensure that **ProcessDesignLab** is selected and click **Submit**.



Task 2: Adding VIN Check Process

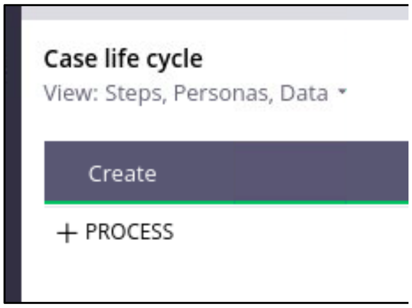
1. In the Explorer pane, **click Case Type → Evaluate and Sell a Vehicle.**



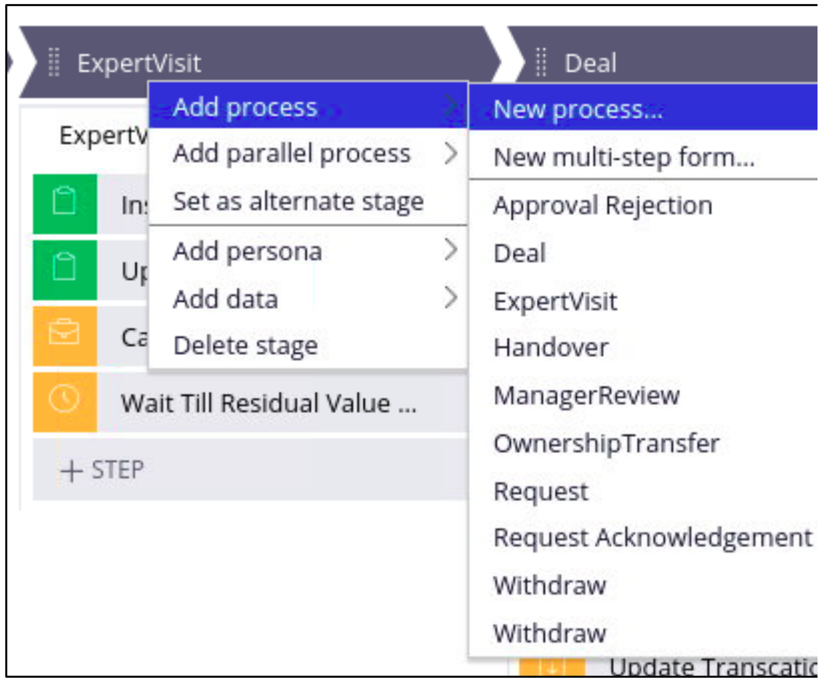
2. Click on Stage **ExpertVisit**. Click on the  icon **Add process→New Process**.

Note: Many of the actions you can take on a stage, process, or step are not visible until you hover your mouse over that part of the screen. For example, you will not see the stacked 3 dots until you bring your mouse over the Expert Visit stage chevron.

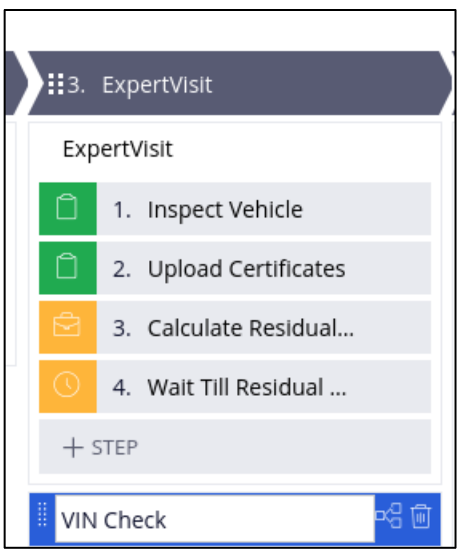
Note: The Menu items also depends upon the view selection and number of flows available in the system as below :



Vin

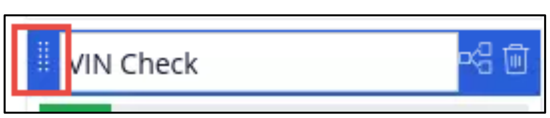


3. Change the name of the process from ExpertVisit(1) to **VIN Check.**



4. Click on the dots next to **VIN Check** and change the order of the processes by dragging. So **VIN Check** starts first.

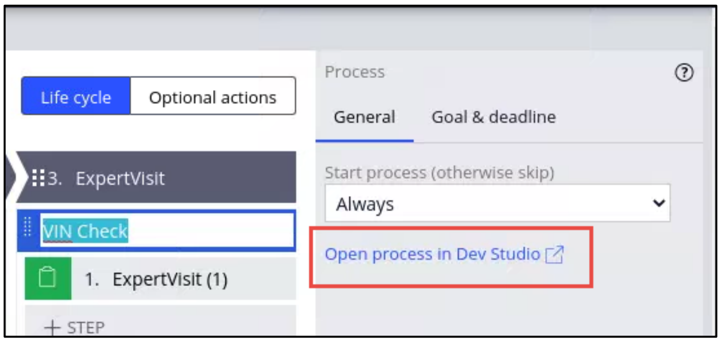
   a. When you hover over the Process bar you will see the handle appear.



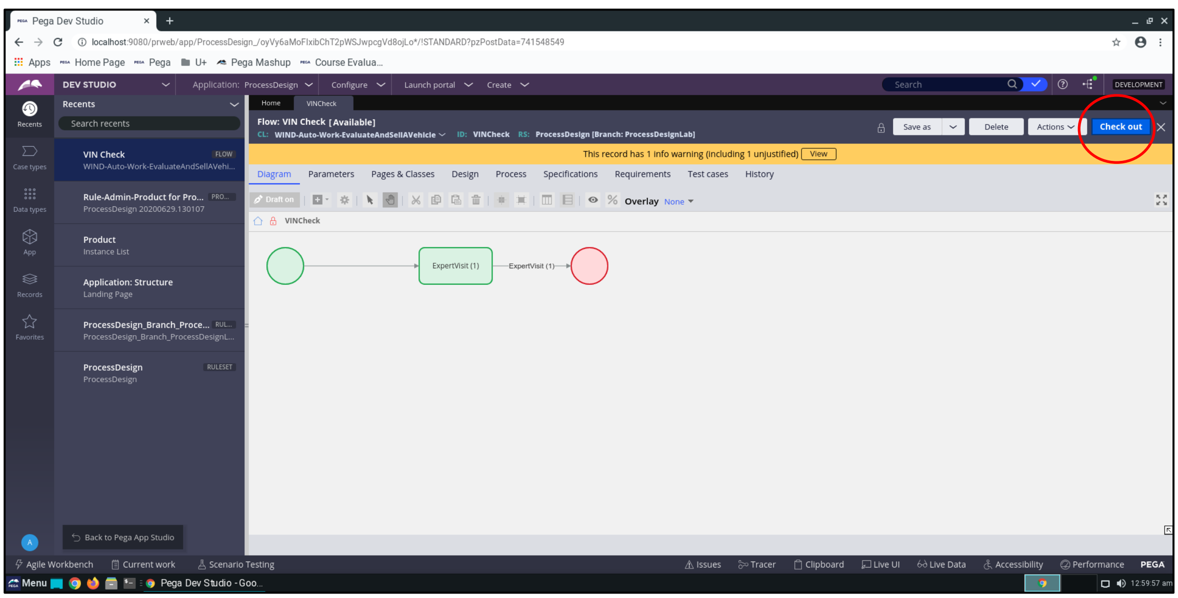
b. When you select the bar a white directional cross of the arrow appears. Hold and drag the **VIN Check** bar over the **ExpertVisit** process bar. You will then see the **ExpertVisit** slide down beneath **VIN Check** as shown in the following screenshot.

5. Click the **Save** button.

6. We have the flexibility of modeling the process using the process modeler for basic features or we can modify the process in the Flow rule in Dev Studio for advanced capabilities. **Click** the link for **Open Process in Dev Studio**.

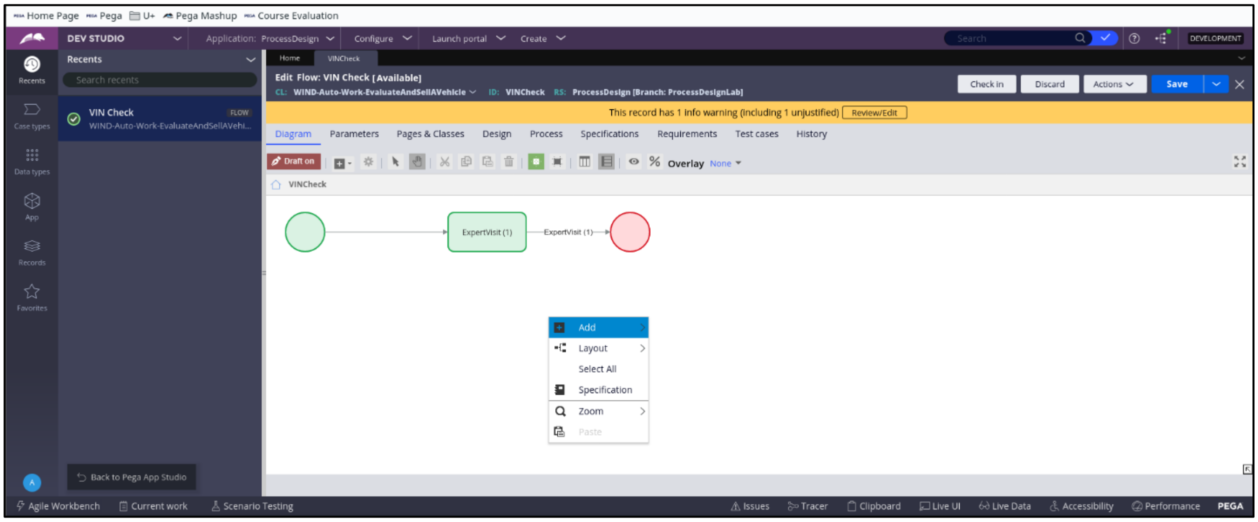


7. The flow rule appears. Click the **Checkout** button.

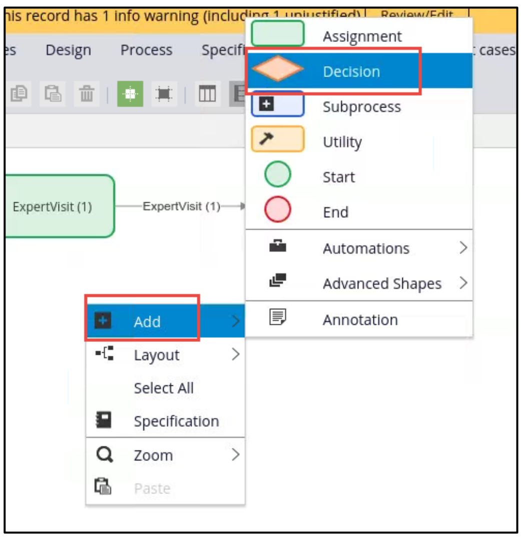


8. Add a **Decision Shape** to the flow.

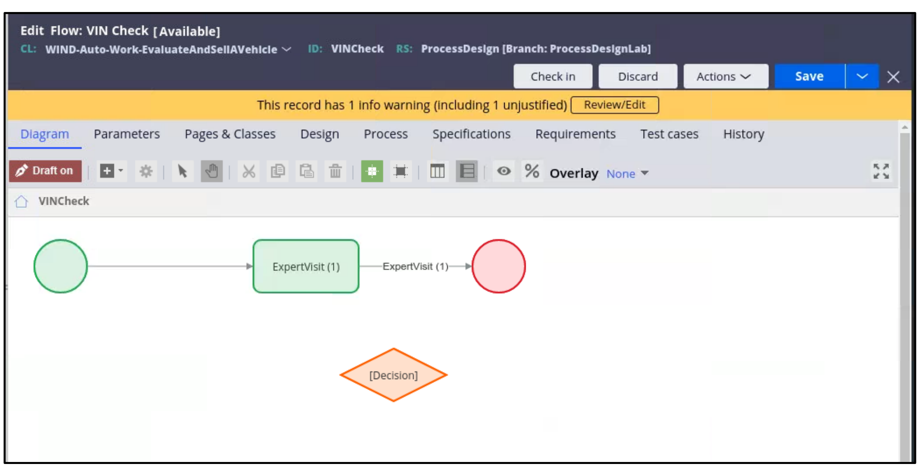
a. Right-click in the center of the pallet to activate the menu.



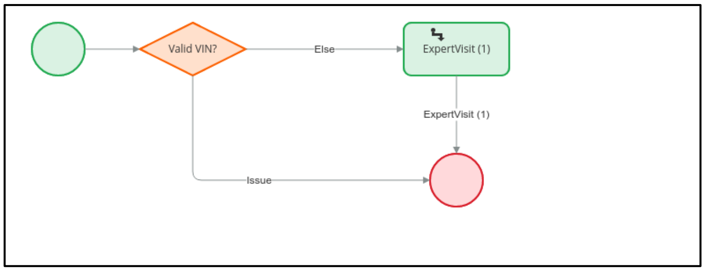
b. Navigate the menu to the Decision shape and select it.



c. The flow will look like the following:

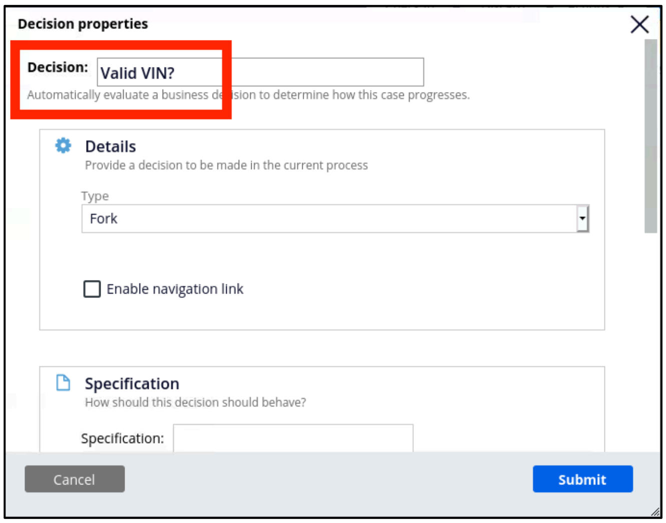


d. Follow the steps e through i below to configure the flow. After configuring the flow, the final flow should look like the image below:

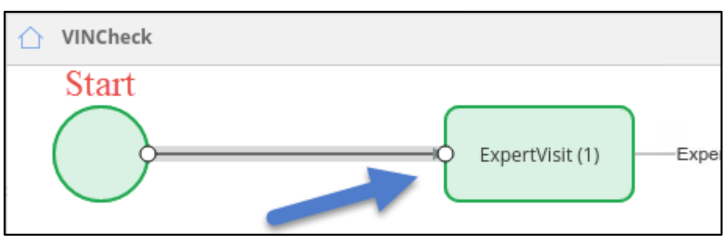


e. **Double Click** on **Decision** and change the name to **"Valid VIN?" .**

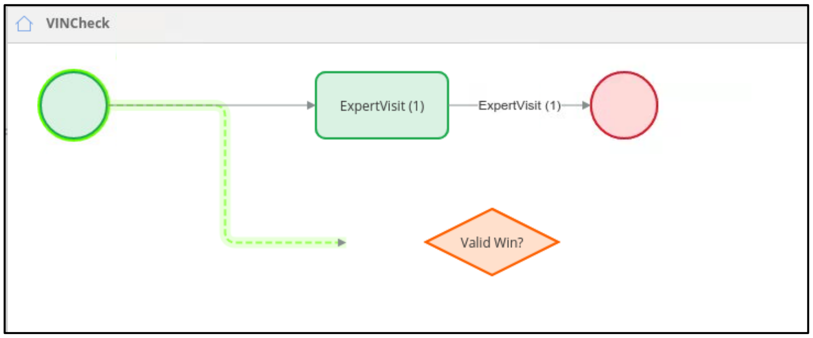
Click **Submit.**



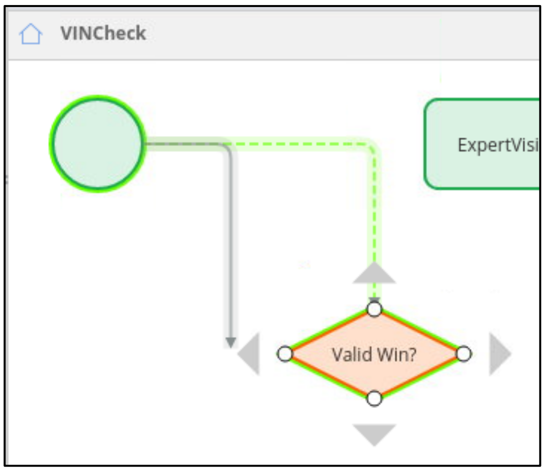
f. Click on the connector coming out of the **Start** shape to activate the connector's endpoints.



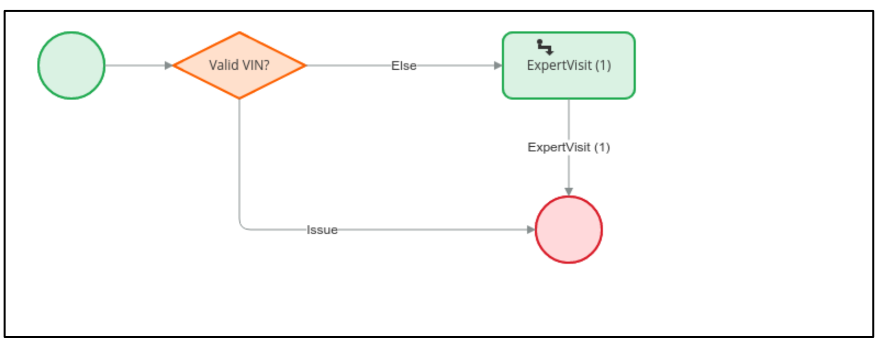
g. We want to reuse this connector. The white circles are handles. Use your mouse to grab the handle and drag it to the center of the decision shape. Notice as you pull the connector the **Start** shape and **connector** begin to glow green.



h. You will know you have successfully connected two shapes when both shapes on either end of the connector glow green.

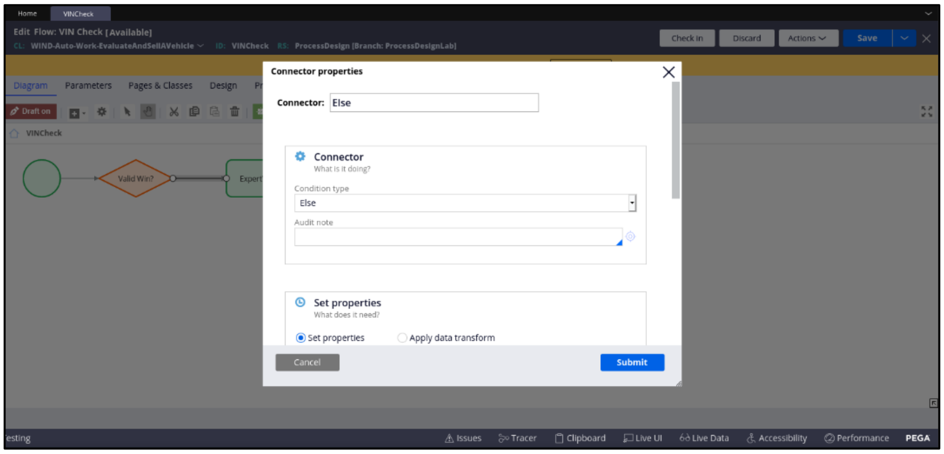


i. Repeat the connector instructions until you have arranged your flow to look like the following.



TIP: You must bring a connector to a shape to lock a connection. If you bring the shape to the connector, it may look like it's connected, but it will not be connected.

9. Double click on the connector going from the Decision shape to the ExpertVisit (1) assignment shape and type the name in the Connector: **Else**.
10. Choose the Condition Type as **Else**. Click **Submit.**



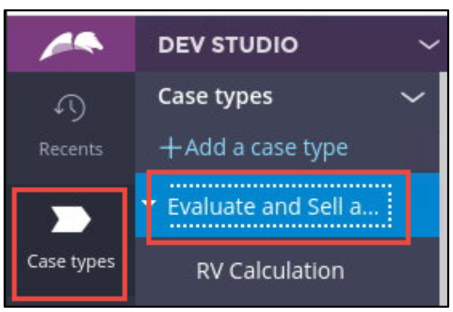
11. Name the other connector going to **End shape** as **Issue**.

12. Change the **Condition Type** to **When** and Click **Submit**.

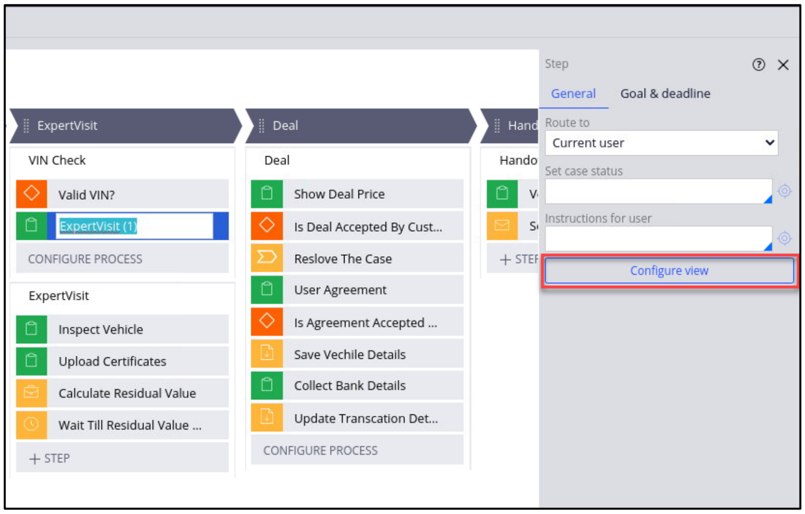
Note: The flow should be in Draft on mode.

13. Click **Save**.

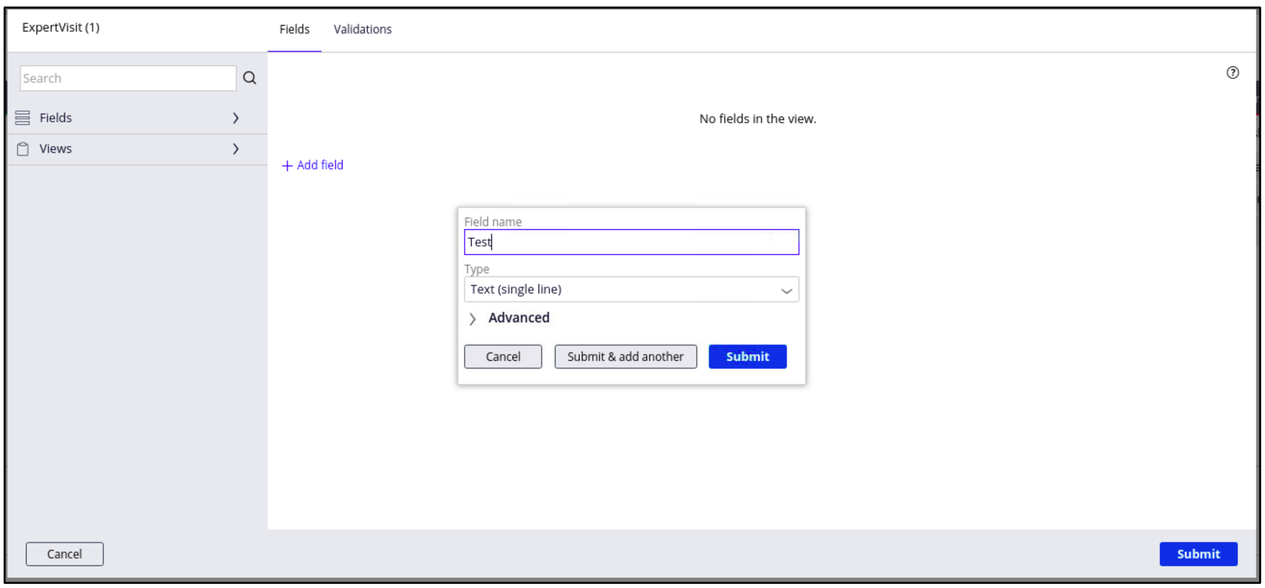
14. Open the Case type again by clicking on **Case Types** > **Evaluate and Sell A Vehicle**.



15. Click on **ExpertVisit(1)** step under VIN Check and on the right side click **Configure View**.



16. Click on the **+Add field** and Add a property of the type text call it **Test**. Click **Submit twice.**



Task 3: Unit test by running the flow in draft mode

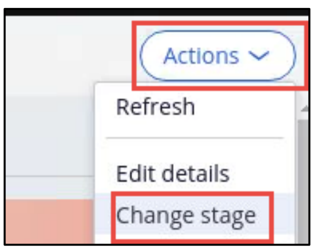
1. Click Save and Run on Case type rule to create a new case.

2. A new case will start in a new tab in Dev Studio.

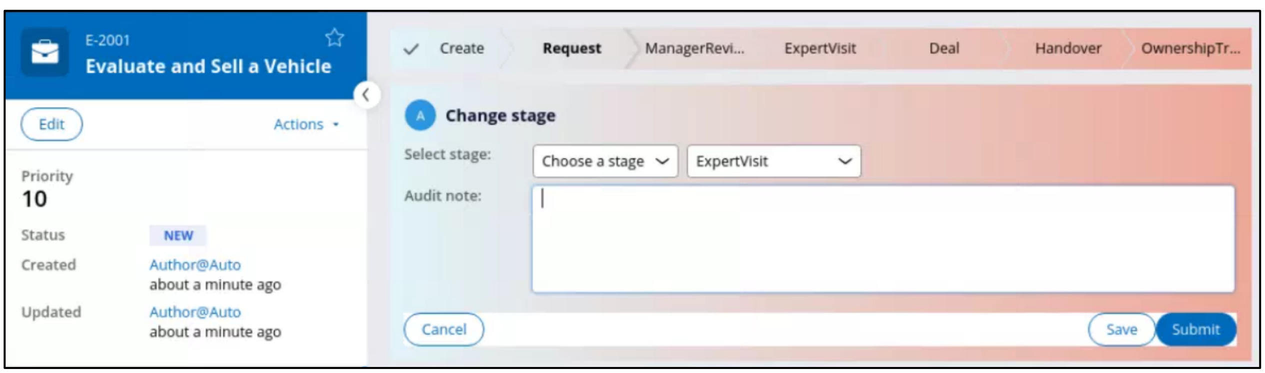
Note: Dev Studio has an advanced feature that allows you to have more than one rule open for configuration at the same time. In this situation, the Flow rule is in one tab, the Case type is in another, and the individual instance of a case you have run for unit testing is in the last tab. This means you can navigate between tabs to see the configurations.

3. To unit test the Flow rule VIN Check we want to skip stages to go directly to the ExpertVisit stage.

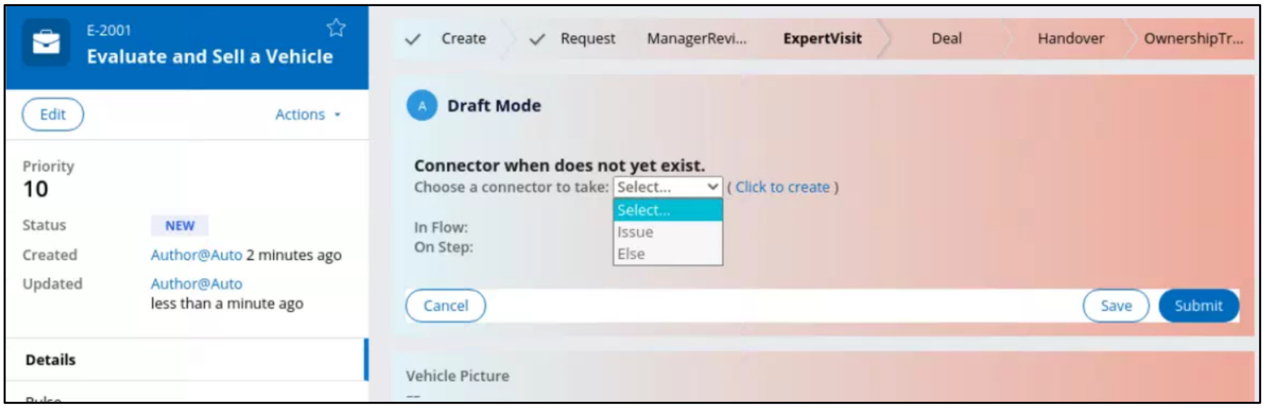
    a. Click **Actions→Change Stage**.



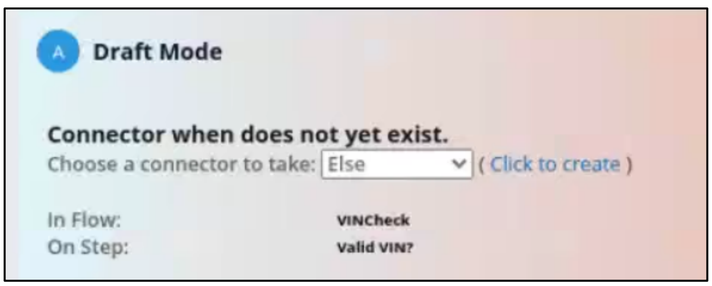
    b. From the Select stage drop down select **Choose a Stage**, select **Expert Visit,** and **click Submit**.



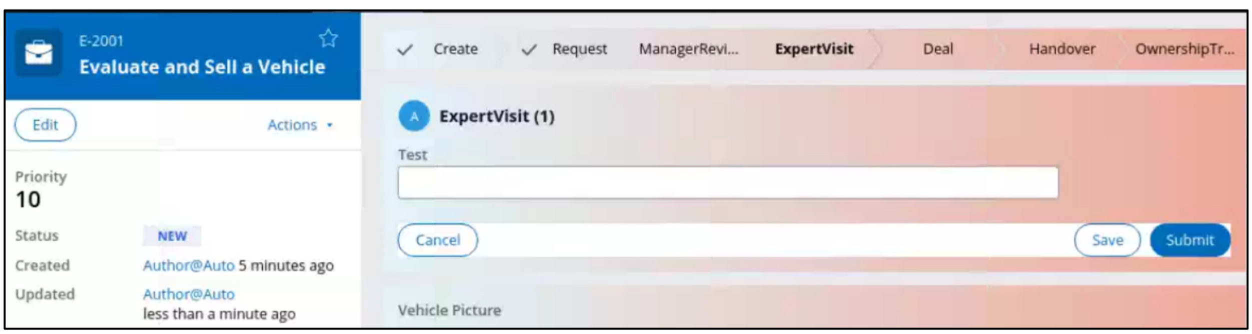
4. The **Decision** shape appears with the field of test. The exercise demonstrates how the application will run in Draft Mode even with the Case Type being incomplete.



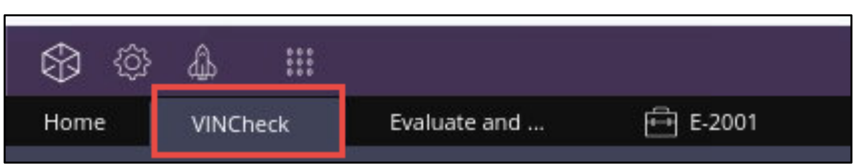
5. At this point in the process design, the business logic has not been configured. The system will pause on the decision shape VINCheck and allow you to choose the connector (or path) to take. Select **Else** from the drop-down list. **Click** on **Submit** button.



6. The case will display the ExpertVisit(1) screen with the Test field visible. Click **Submit**.

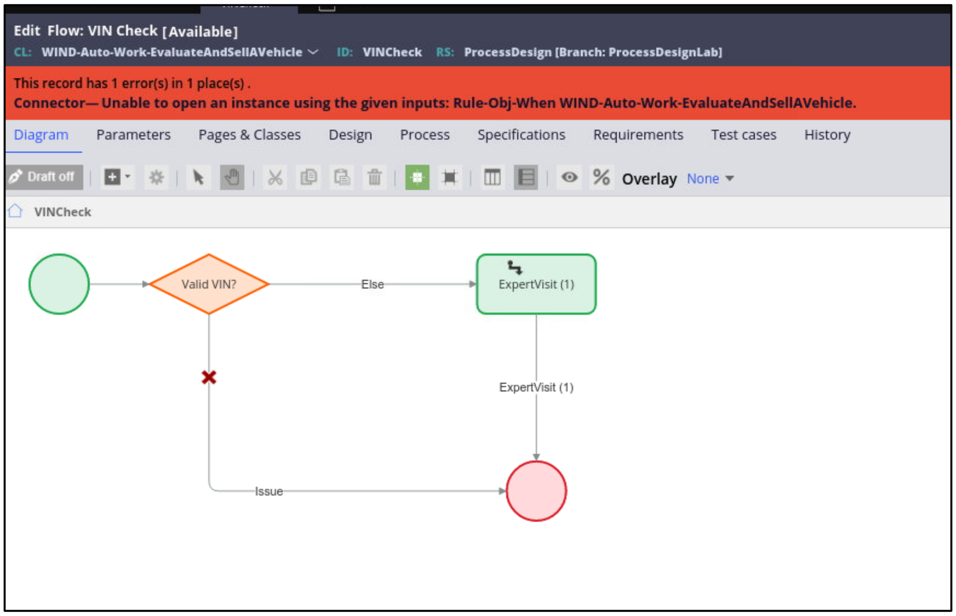


7. Open the Flow Vin Check again. The flow rule should still be open in a tab in Dev Studio.

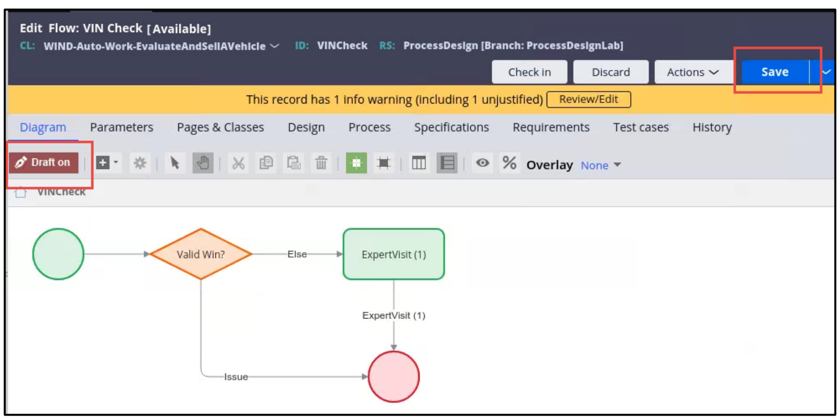


8. Click on **Draft on** button. This will change the flow to **Draft off** mode. Click **Save**.

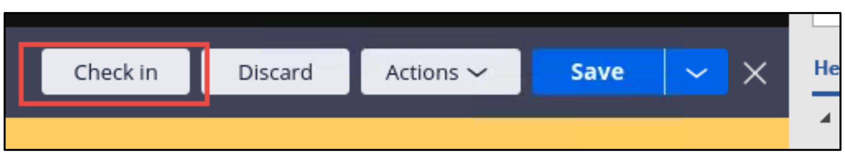
   Pega shows an error messaging indicating that the flow is incomplete.



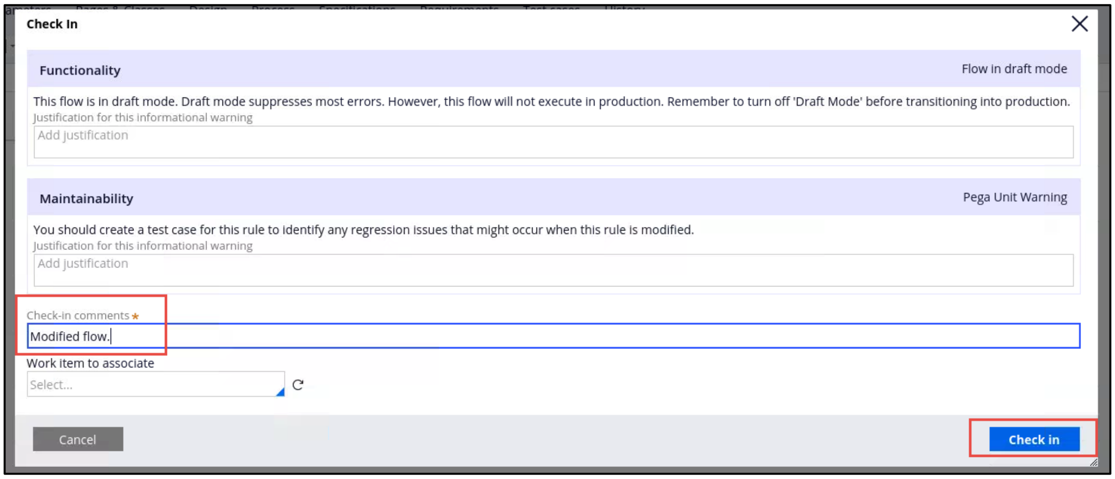
9. Turn **Draft on**. The error message will not be displayed. Click **Save**.



10. Click **Check in**.

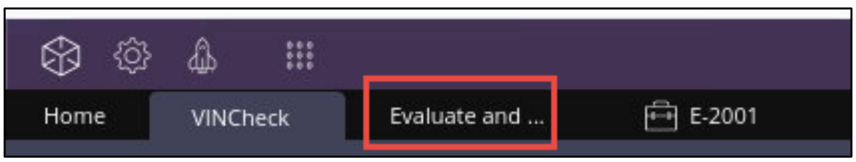


11. Enter a **check-in comment**. Click **Check In**.



Task 4: Add Alternate Flow

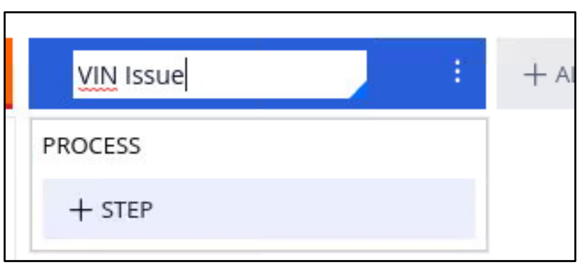
1. The Evaluate and Sell case type is still open. Navigate to the tab.



2. Add a new Alternate Stage called VIN Issue.

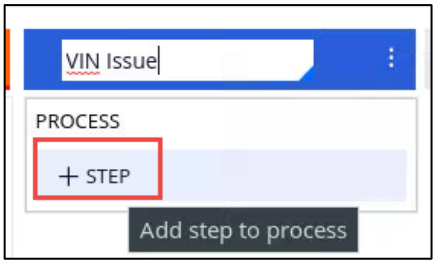
   a. Click on the +Alternate Stage icon.

   b. Name the Stage VIN Issue.

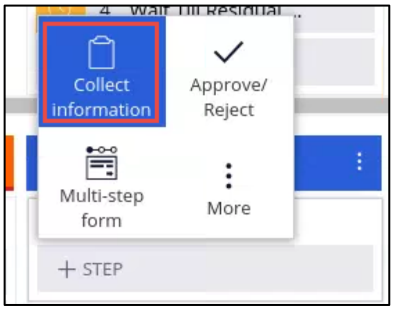


3. Add a Process with steps to the VIN Issue stage.

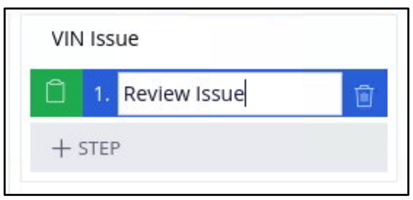
   a. Mouse over the **+process** and add click on the **+Step**



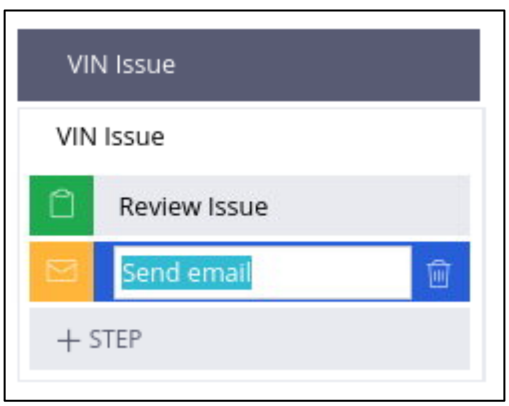
b. Adding a new step by choosing **Collect information**.



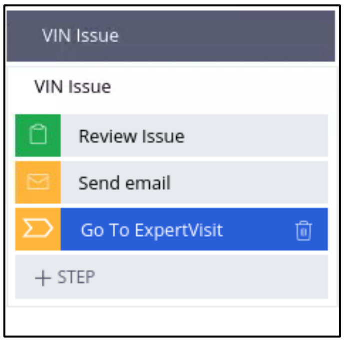
c. Call the step Review Issue.



d. To add another step, select **+Step > More > Automations > Send Email > Select**.

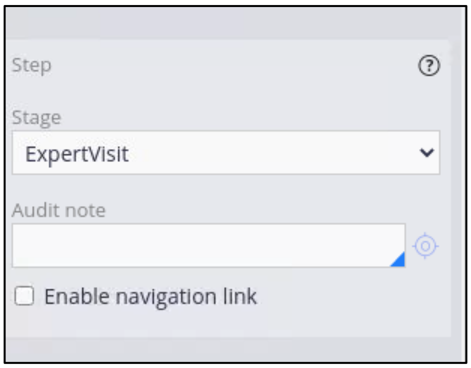


e. Add another step by selecting **+Step > More > Automations > Change to a Stage > Select**. Rename the step to **Go To ExpertVisit**.

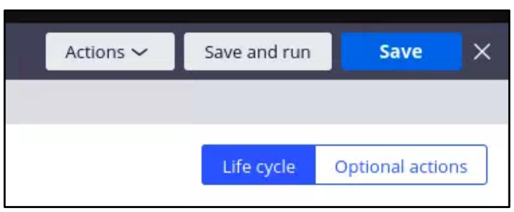


f. Configure the step properties from the context panel on the right.

Change the Stage name from the drop down to **ExpertVisit.**



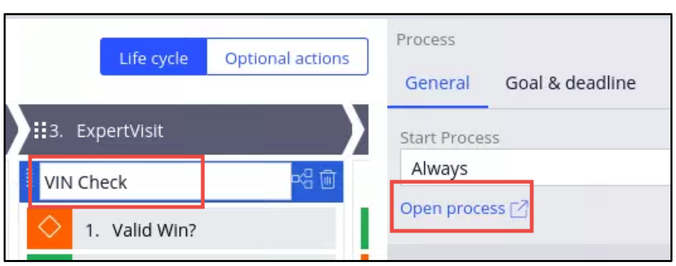
4. Click **Save** button.



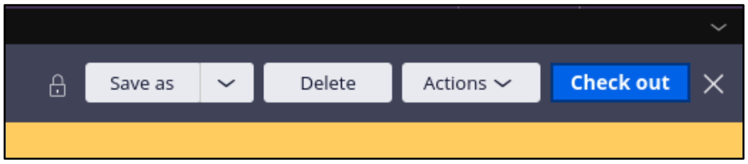
Task 5: Add business logic to send case to alternate flow

1. Open the VIN Check process and modify the process to send the case to an alternate stage when there is a VIN Issue.

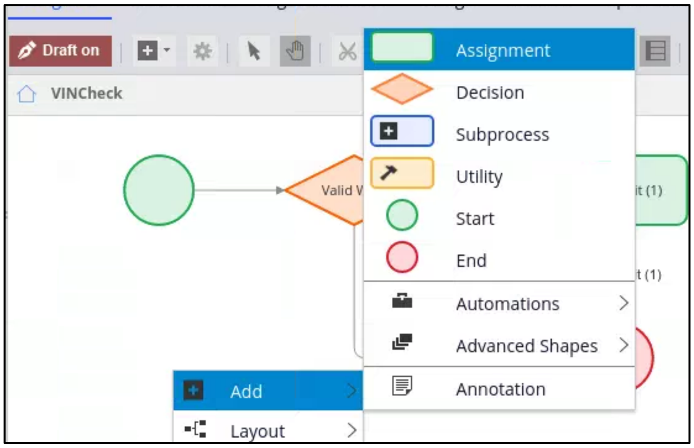
   a. Select **VIN Check** process and click the **Open process** link.



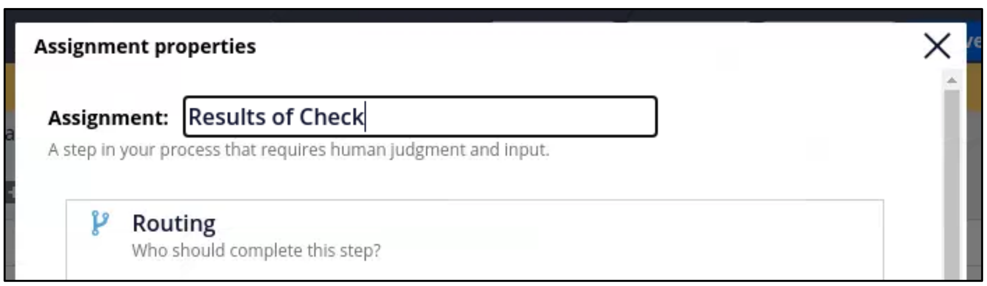
   b. The flow rule appears. Click **Check out**.



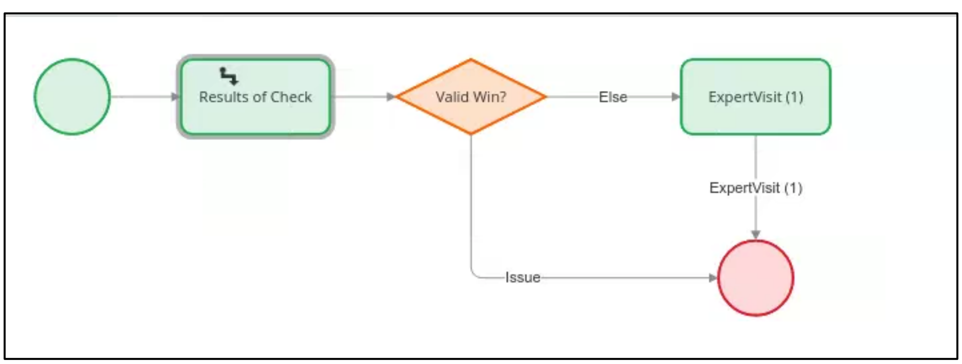
c. Right-click in the pallet and Add an assignment shape.



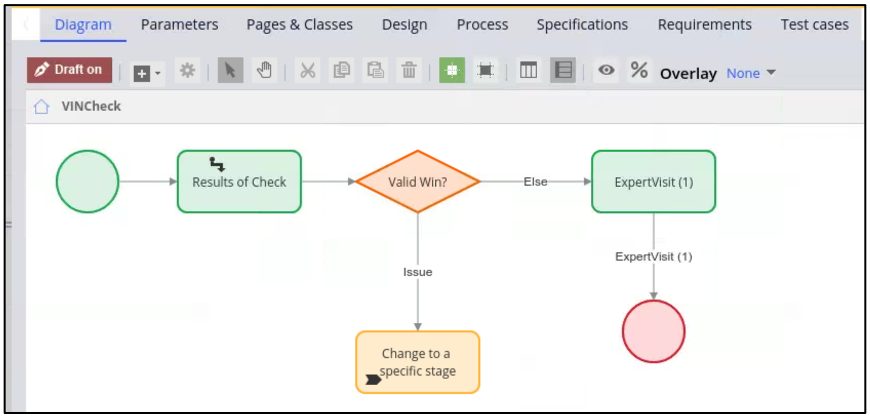
2. **Name** the new assignment shape **Results of Check**.



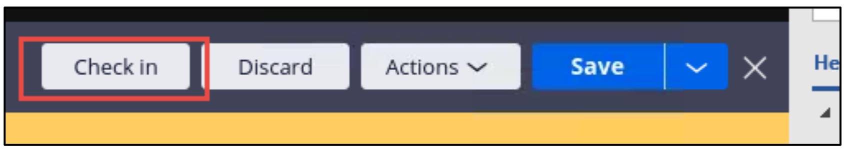
a. The connector coming out of the Start shape should be connected to the new assignment shape. (Move shapes around in the pallet to make room.) Click **Submit**.



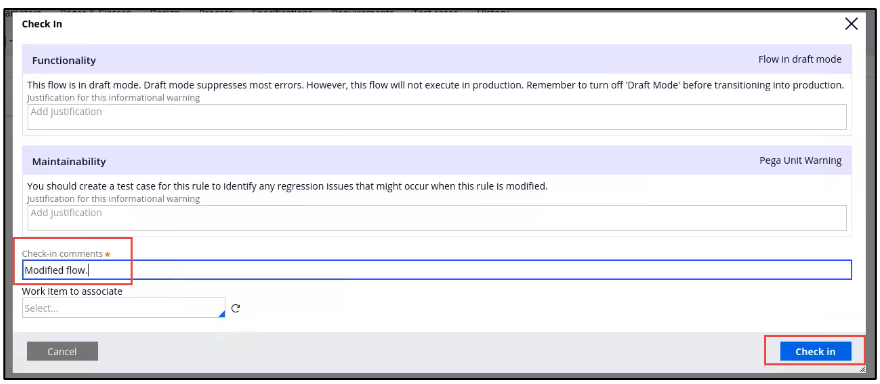
b. Right click in the pallet and add a **Change to a Stage** Automation shape. Connect the **Issue** connector to the shape.



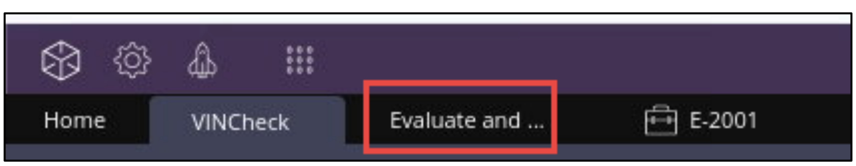
3. Click **Save.**
4. Click **Check in.**

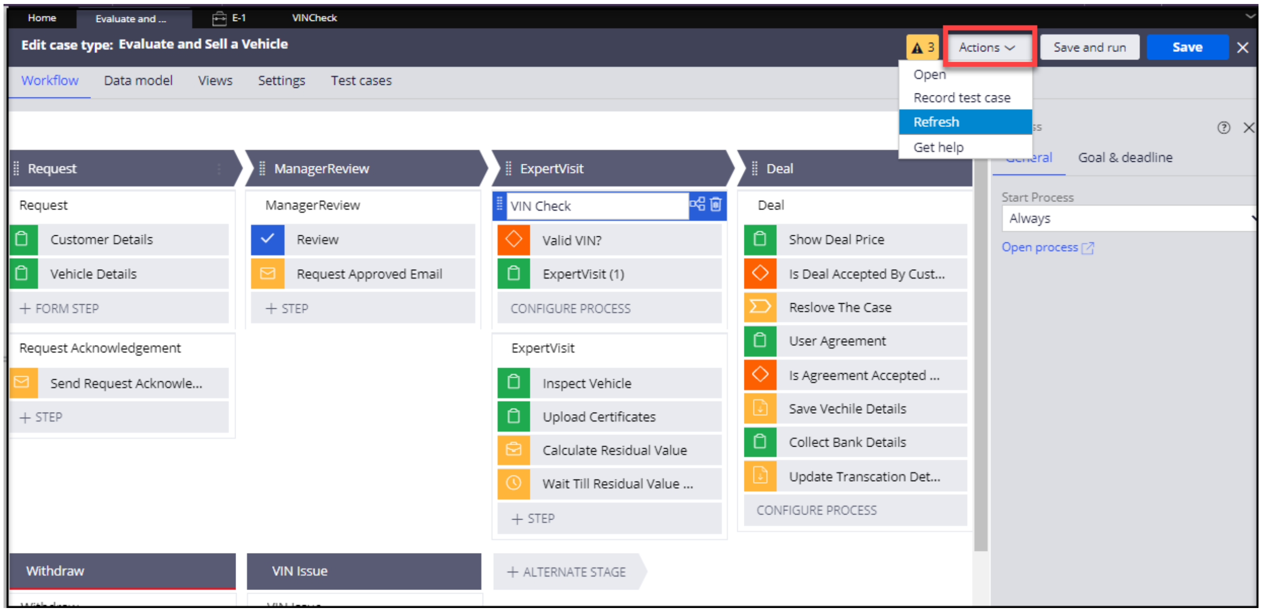


5. Enter a **check-in comment**. Click **Check In**.

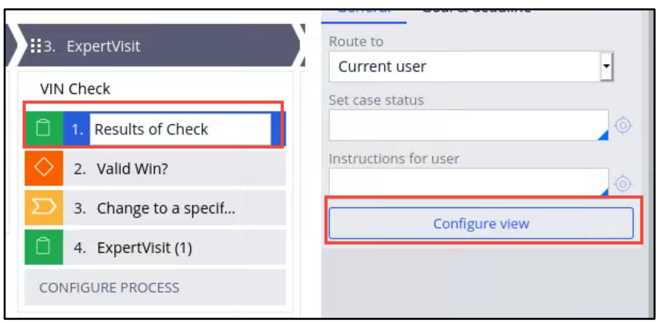


6. The Evaluate and Sell case type is still open. Navigate to the tab and click **Actions** > **Refresh** on the case type.

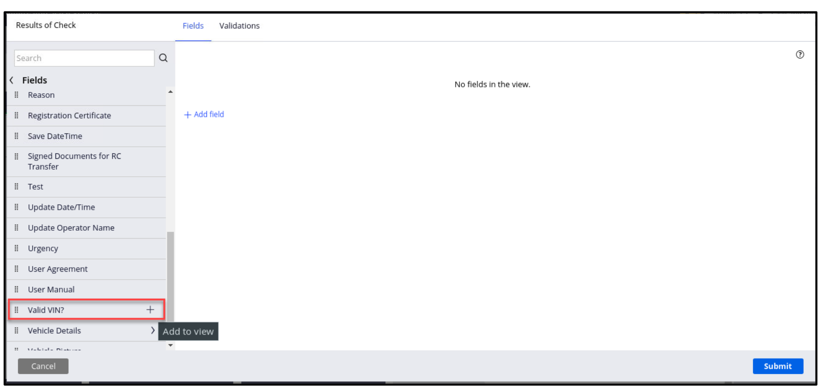




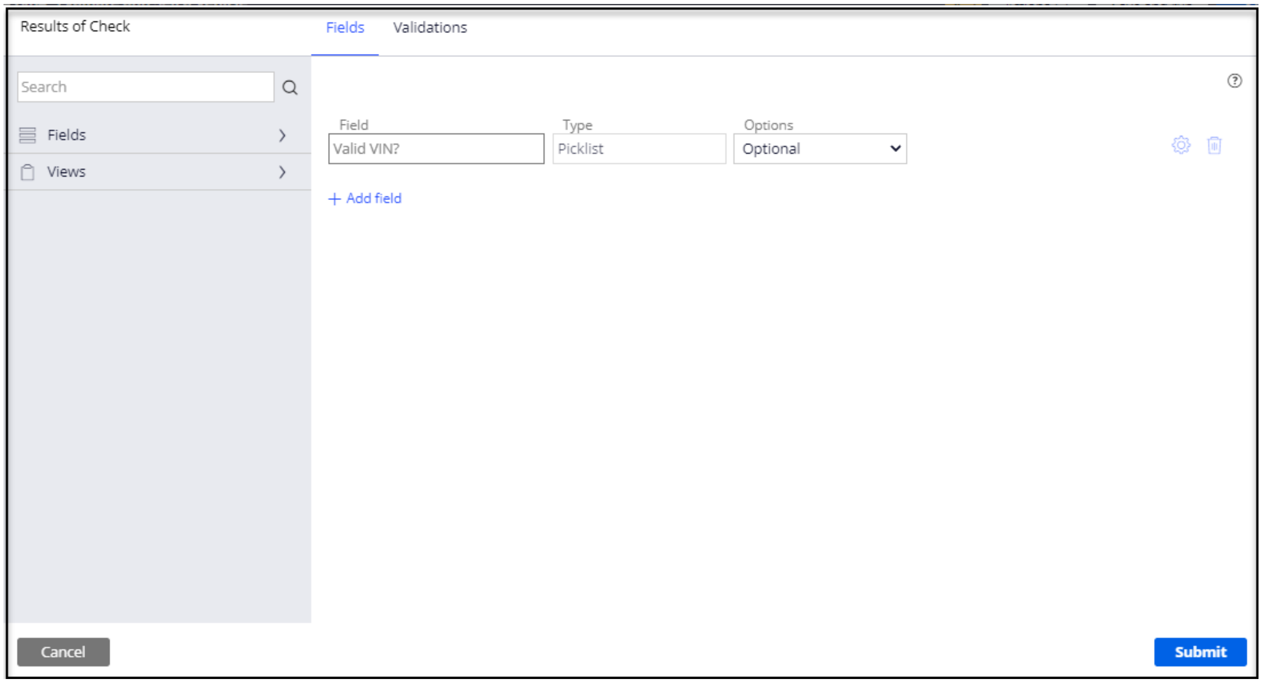
7. Click on **Results of Check**. In the properties panel, click on **Configure View.**



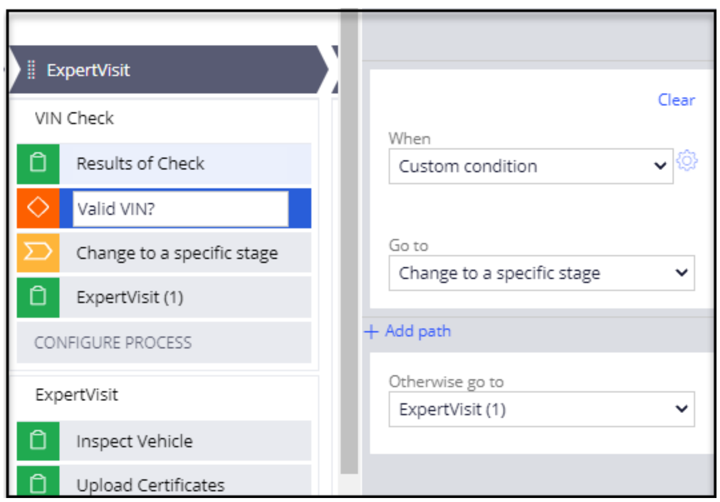
8. Expand **> Fields.** Hover over the field **Valid VIN?** Click the **"+"** icon for the property to add it to the view.



9. Click **Submit.**

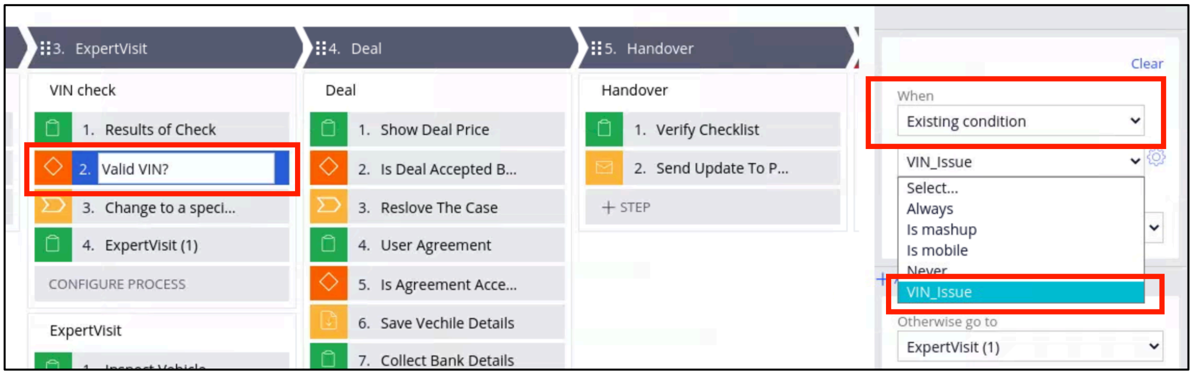


10. Click on the step **Valid Vin?** and look at the properties panel. We will configure a custom condition to send the case to the Alternate Stage when the VIN is Invalid or Unknown. Otherwise, we will send it to ExpertVisit(1).

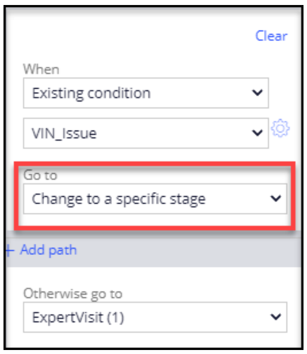


a. Change the **When** to Existing condition. Select **VIN_Issue** from the next drop down.

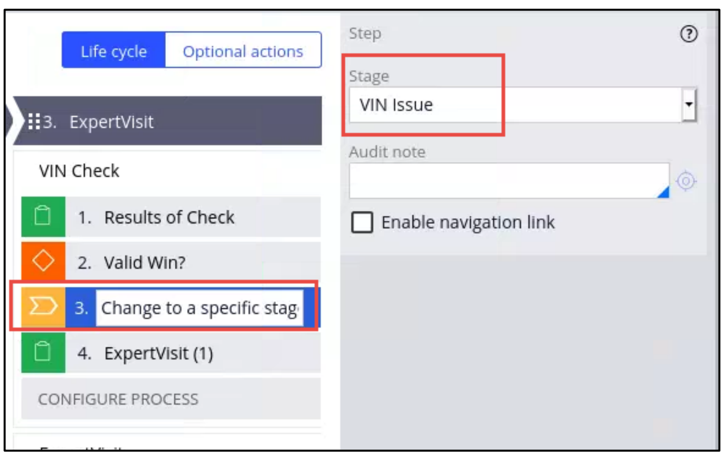
Note: A When condition is already created to use in this lab.



b. Set **Go to** drop down to **Change to a specific stage.**



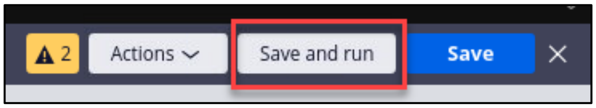
c. Select the **change stage shape** and configure the case to go to **VIN Issue** stage as shown below.



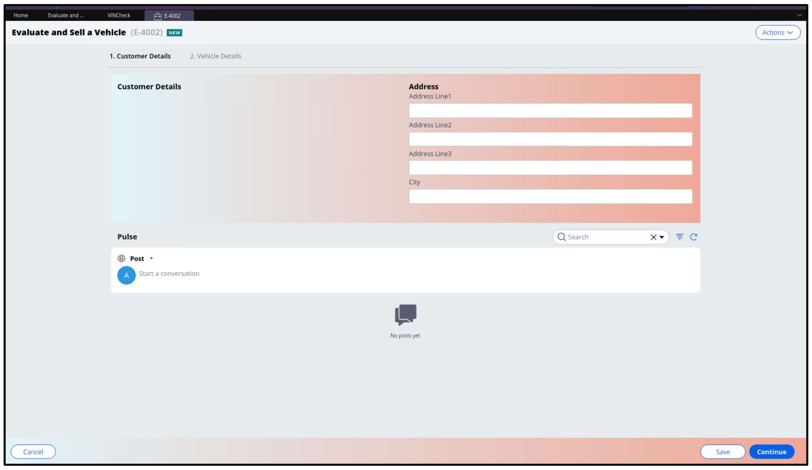
11. Click **Save.**

Task 6: Verify when the VIN is invalid the case is sent to the alternate flow

1. Click **Save and Run**.

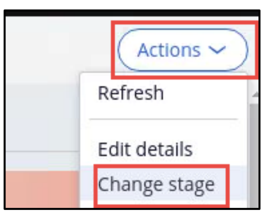


2. A new case will start in a new tab in Dev Studio.

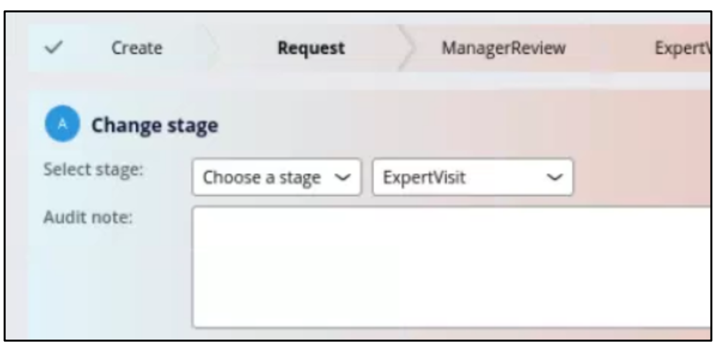


3. To unit test the Flow rule **VIN Check**, we want to skip stages to go directly to the ExpertVisit stage.

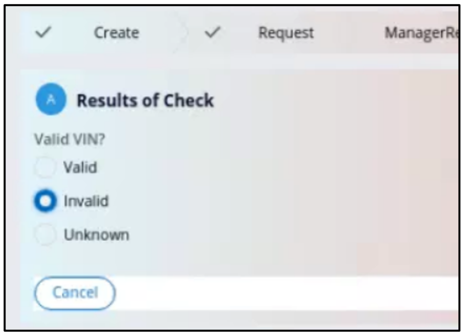
   a. Click **Actions > Change Stage**.



   b. Select **Choose a Stage**, select **Expert Visit** and **click Submit.**

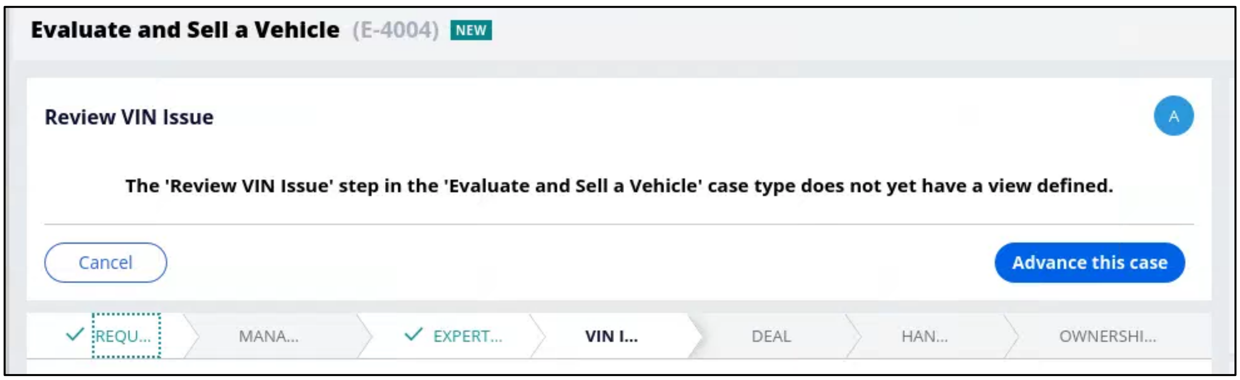


4. Select **Invalid** and select **Submit.**



Note: By selecting the "Invalid" option, the case will be routed to the Alternate Stage that we added earlier and the resulting screen will show the first step in the "VIN Issue" Alternate Stage.

5. The **Reivew VIN Issue** will be the first step in the **VIN Issue** Stage which is the Alternate Stage in the case.



6. **Log Off.**

Optional Actions and Processes

Scenario

The Auto Application Case Life Cycle Evaluate and Sell A Vehicle has been defined. After investigation, the team determines there is a need to allow users to change to the VIN Issue Alternate process when an issue with the VIN arises.

Use the following credentials to log into the exercise system:

Role	Username	Password
Author	Author@OptionalActions	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Task 2: Adding a Case Wide Optional Process

- Add an optional process when there is an issue with the VIN.
- Verify the optional process with the creation of a new case.

Task 3: Verify your work

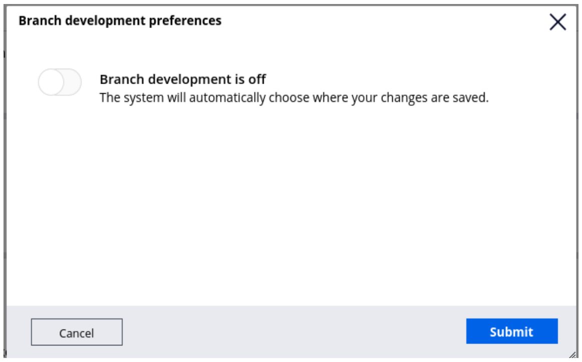
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

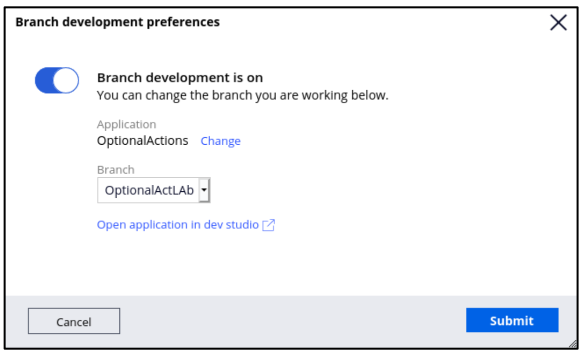
Task 1: Log in and enable branch development

1. Log into Pega using the username **Author@OptionalActions** and the password of **rules**.
2. From the title bar, click the **Branch development** icon.

3. The following appears:

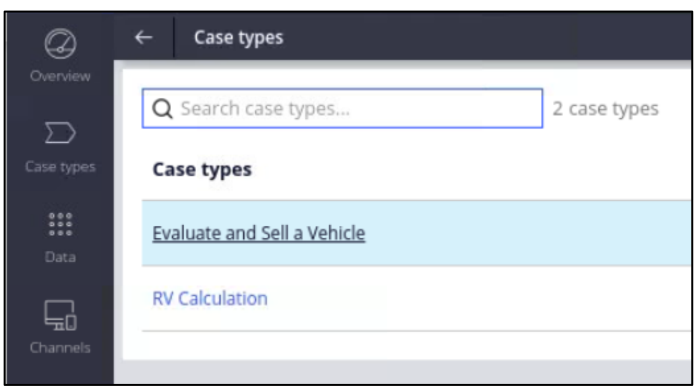


4. Move the **toggle button slider** to turn branch development on.
5. From the Branch dropdown menu, ensure that **OptionalActLab** is selected, then click **Submit**.

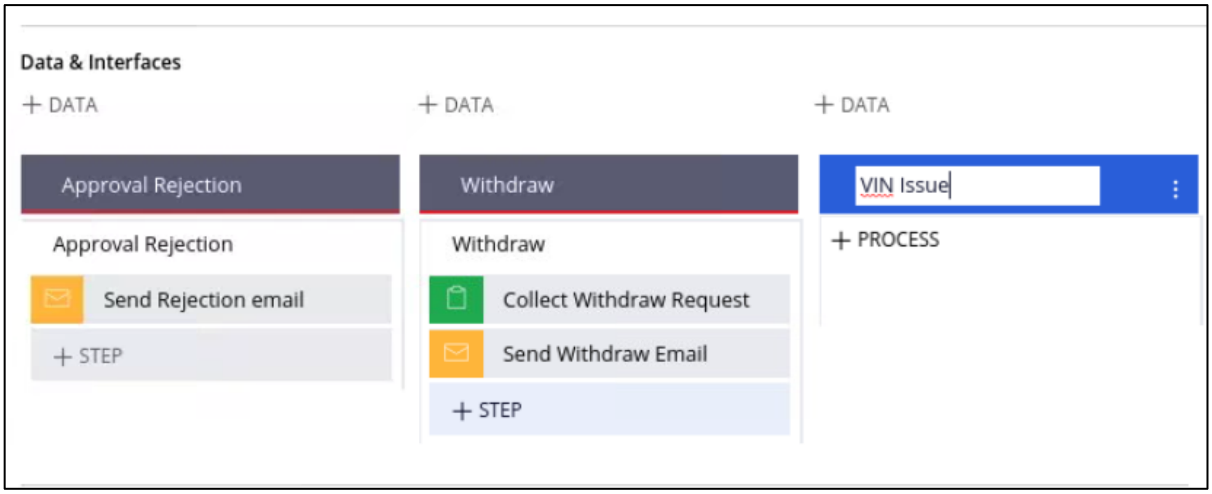


Task 2: Adding a Case Wide Optional Process

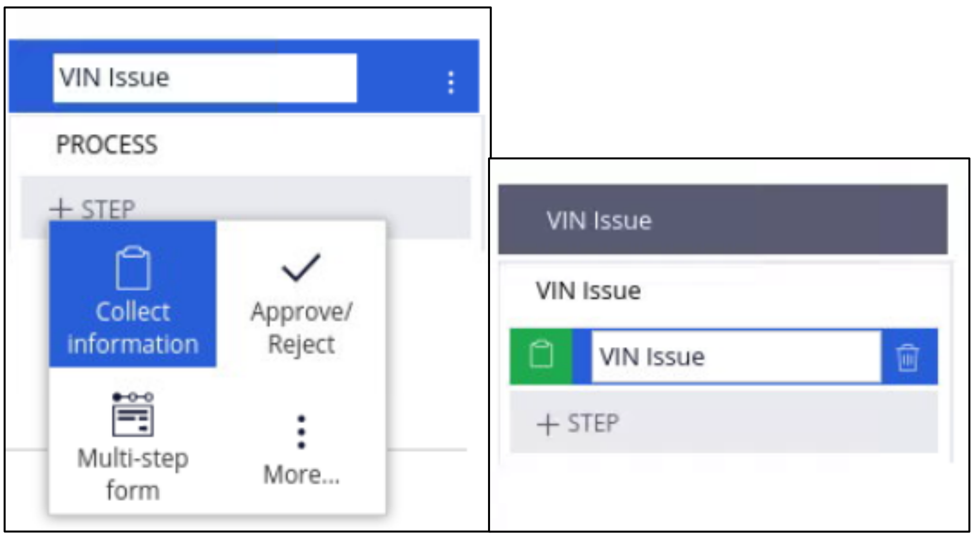
1. Click and open **Case Types > Evaluate and Sell a Vehicle**.



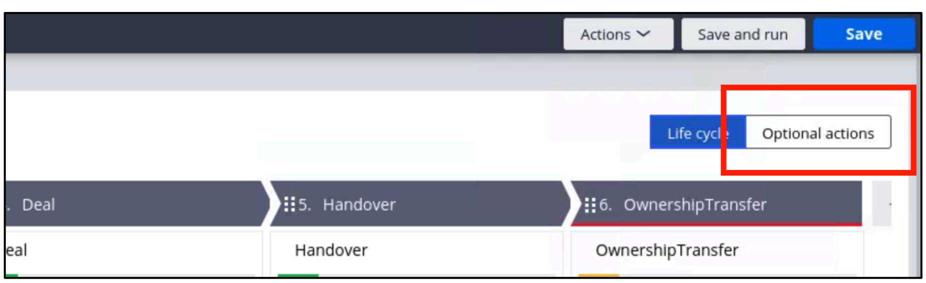
2. Add an **Alternate Stage** called **VIN Issue**.



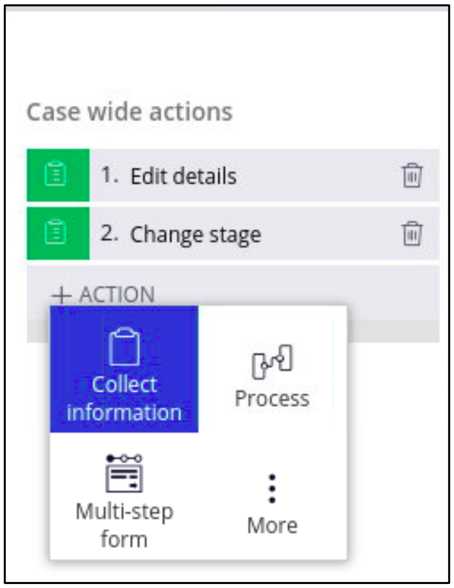
3. Add a **Collect Information** step and rename it **VIN Issue**. Then, click **Save**.



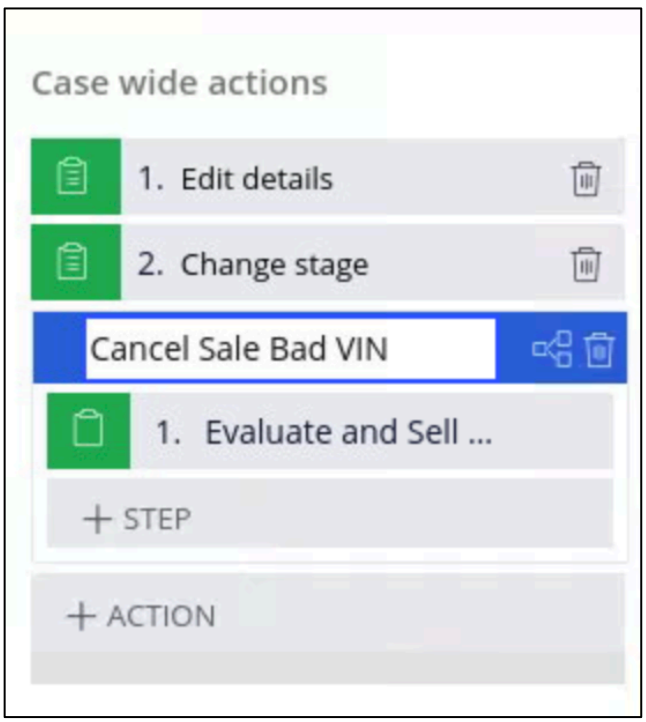
4. Click the **Optional actions** button located above the last stage.



5. Under **Case wide actions**, located at the left corner of the stages, click **+ ACTION**, then click **Process**, to add the Cancel Process.

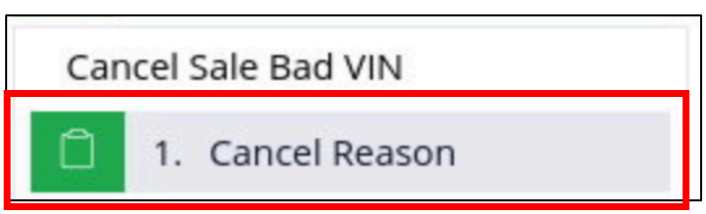


6. Name the process `Cancel Sale Bad VIN`.



The "Cancel Sale Bad VIN" process is being added as a Case wide process. So users can call this process anytime during case execution.

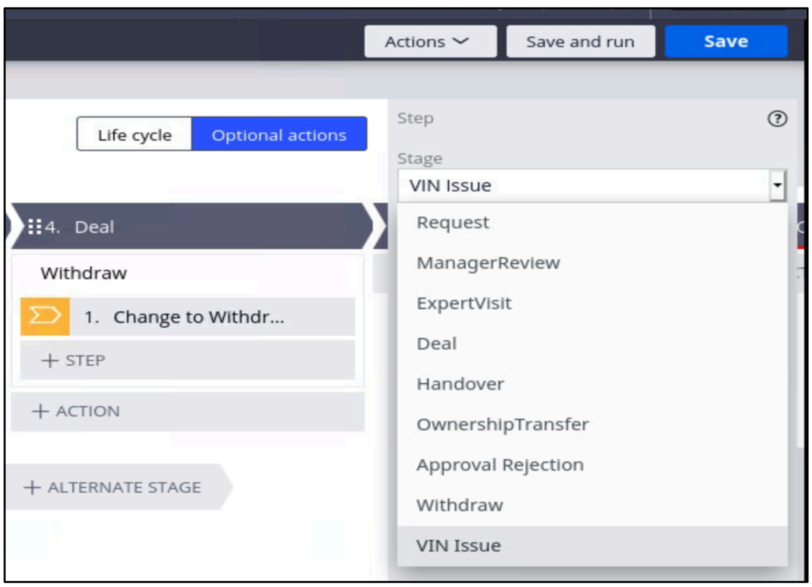
7. Rename the first collect information step to `Cancel Reason`.



8. Click **+Step > More > Automation > Change to a Stage**. Then click **Select**.

9. Click on the Step, **Change to a specific stage**. In the contextual properties window, select the stage **VIN Issue** and save the case type.

10. **Save**

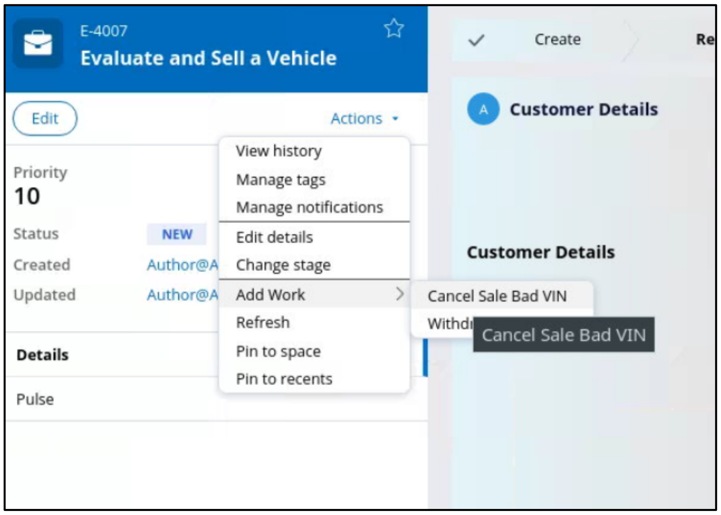


When the end user runs the optional process "Cancel Sale BAD VIN", the user should enter the reason for cancelling the sale and the case should then move to the VIN issue stage.

Task 3: Verify your work

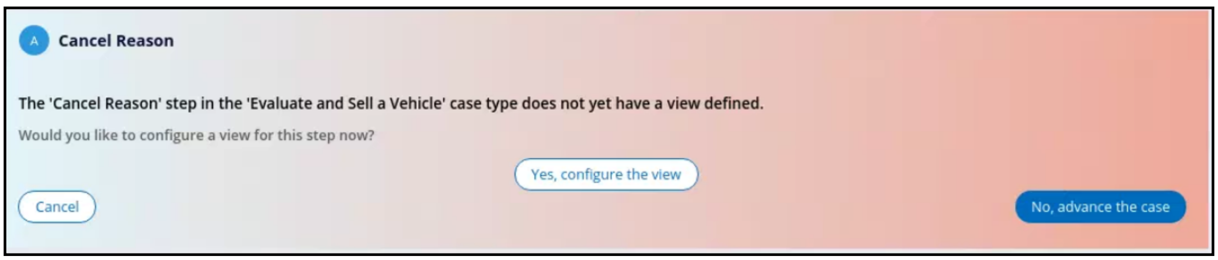
1. Click on **Life Cycle**. Click **Save and Run** to create a new case instance.
2. Click **Actions > Add Work > Cancel Sale Bad VIN**.

   This starts the Optional process to cancel the sale due to a bad VIN.

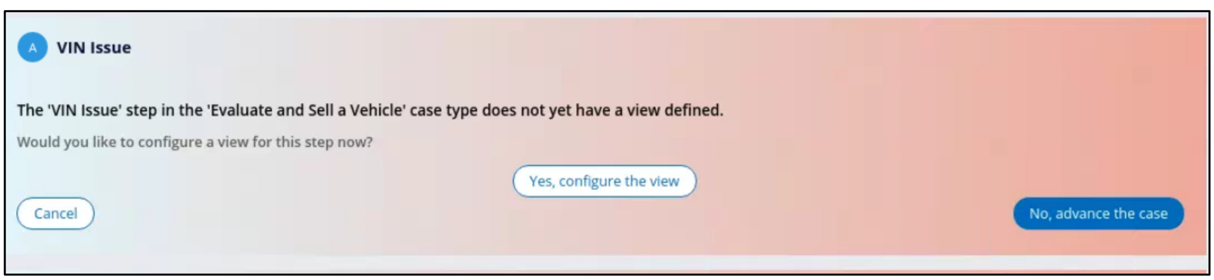


3. The Cancel Reason screen should display. Click **No, advance the case**.

Note: Since the Cancel Reason screen (section) has not yet been configured, we skip this step and move on to the next by clicking on "No, advance the case".



4. Verify that the instance has moved into the Alternate Stage as shown below:



5. **Log off**.

Data Management

Properties

Scenario

For each customer using the services of the company to sell a vehicle, a list of customer preferences needs to be maintained. These preferences are captured during the evaluation and selling of a vehicle

To implement this requirement the appropriate field needs to be captured with the following information:

- Requested payment method (Cash, Credit Card, Banker's Draft)
- Required completion date for the sale
- I am flexible on price (Yes/No)

You will update the view on the appropriate step of the case type to implement this field.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Citizen Developer	**AdminProperties@auto**	**rules**

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in in and enable branch development

Enable branch development to allow modification of cases.

Task 2: Create the Customer Preferences Field

As a Citizen Developer, create a field to capture the customer's preferences.

Task 3: Verify your work

Run a case

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

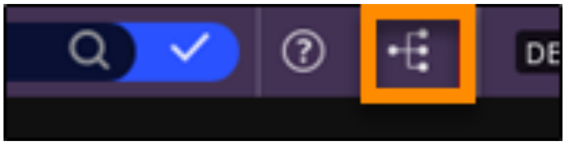
Detailed Steps

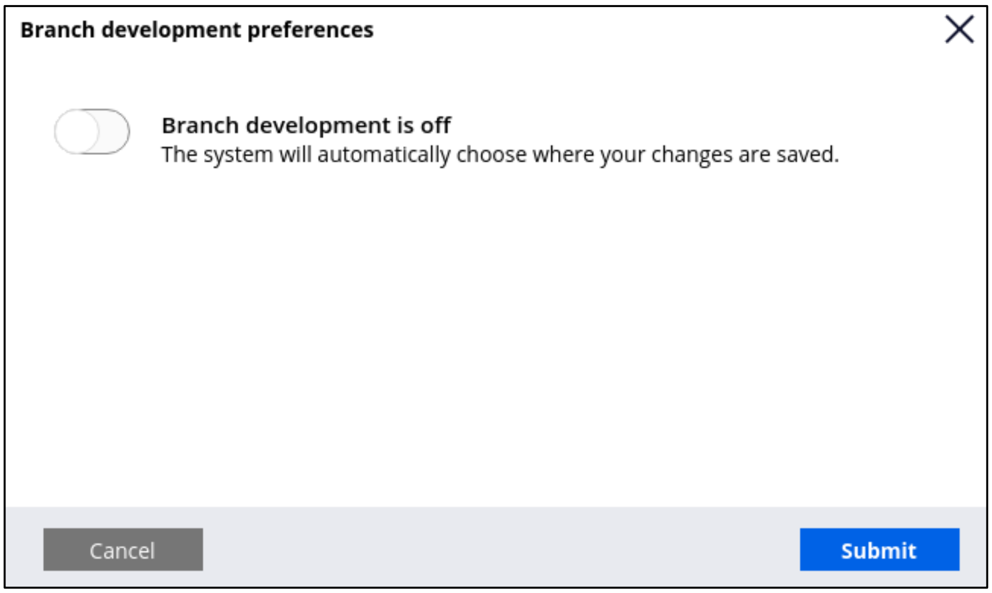
Task 1: Log in and enable branch development.

1. Log in and use the credentials **AdminProperties@auto** and password **rules**.

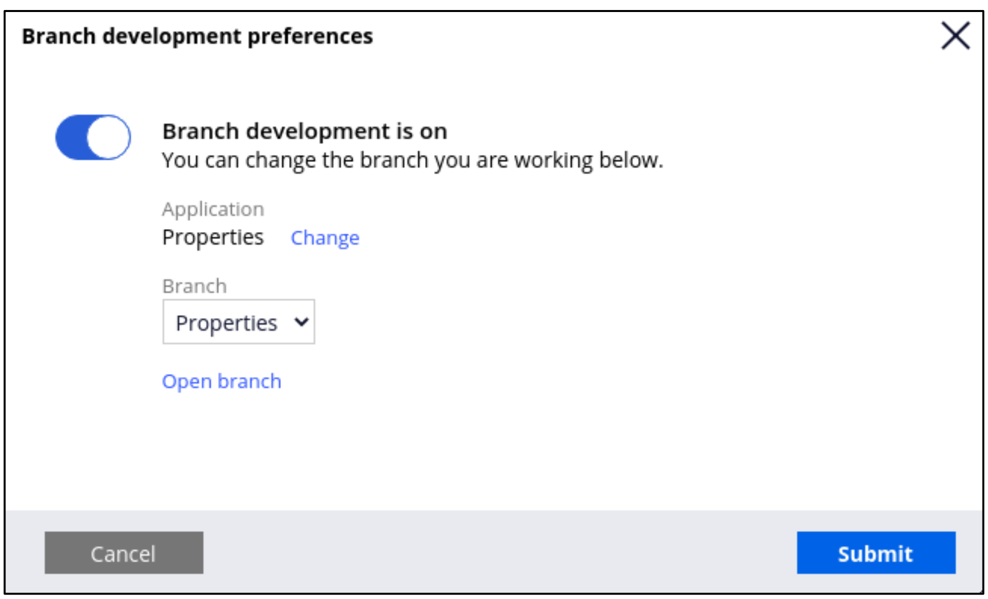
NOTE: if you see the dialogue box "One journey at a time" click **Close**. We do not need to enable this feature for this lab.

2. From the title bar click **Toggle branch development**. The Branch development preferences window appears.





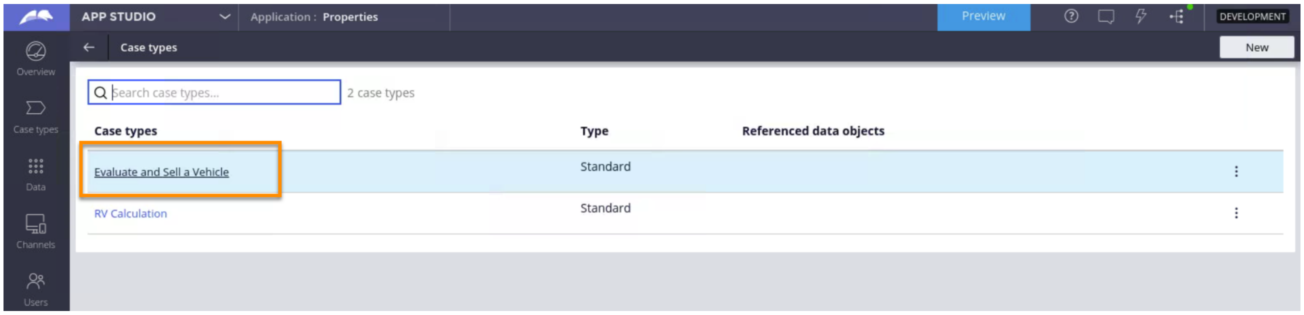
3. Move the slider to the right, the properties branch appears.



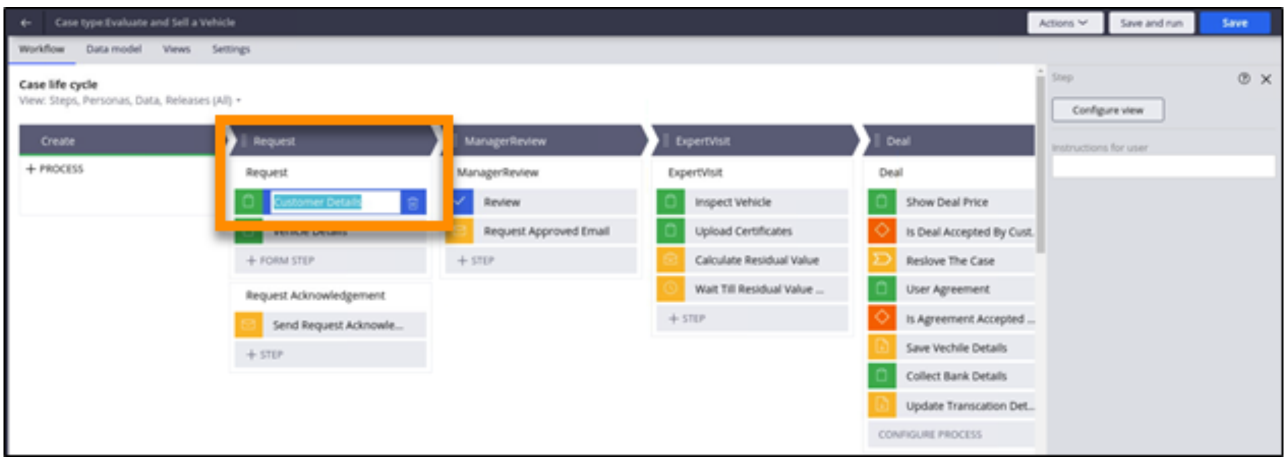
4. Click **Submit**.

Task 2: Create the Request Status Data Type

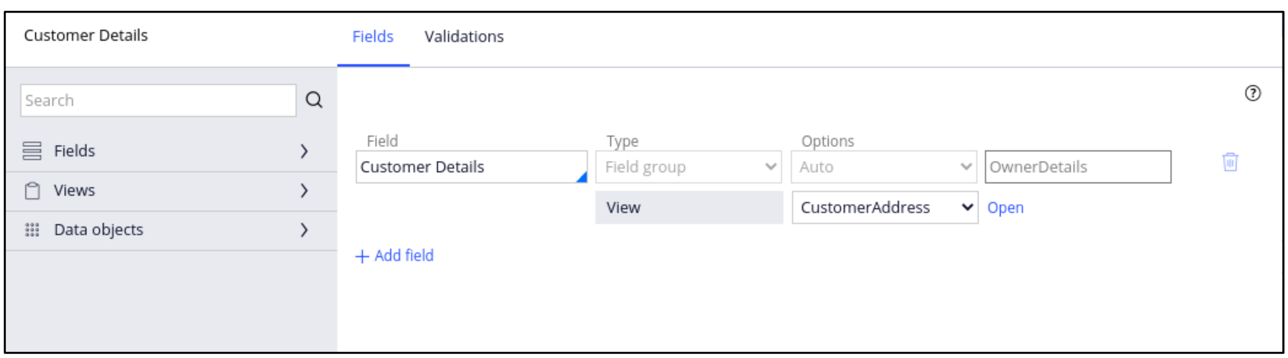
1. From **Case types** select **Evaluate and Sell a Vehicle**.



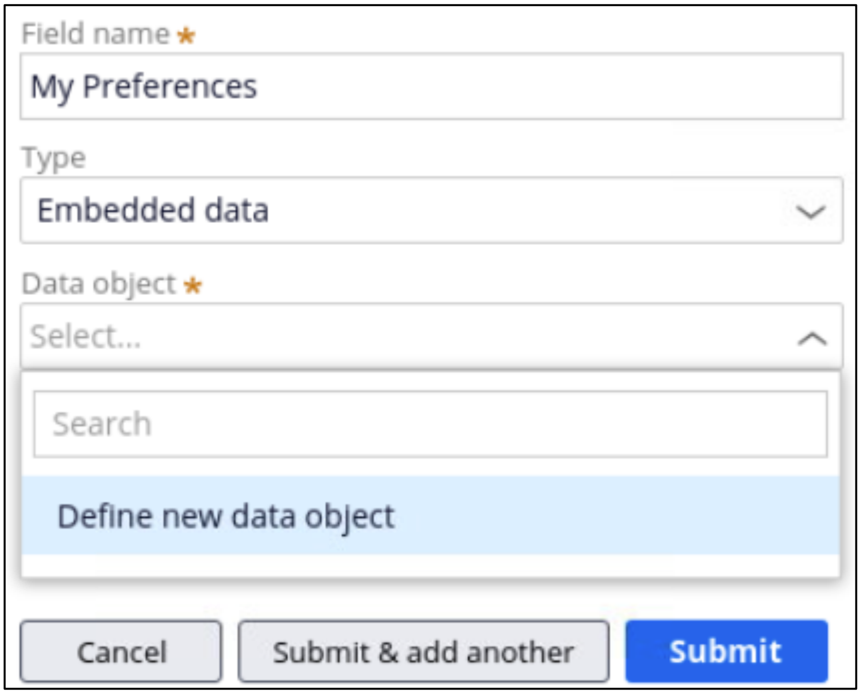
2. Select the **Customer Details** step in the second stage.



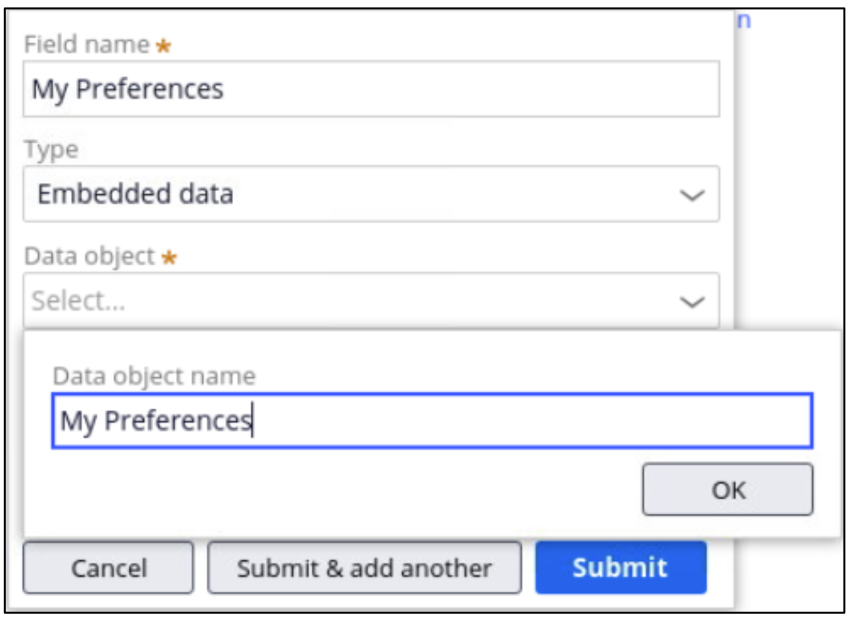
3. Click **Configure View** in the right-hand panel. The following appears.



4. Click **+ Add field** and enter **My Preferences** as the Field name and **Embedded Data** as the **Type**. Select Target type as **Define new data object**.

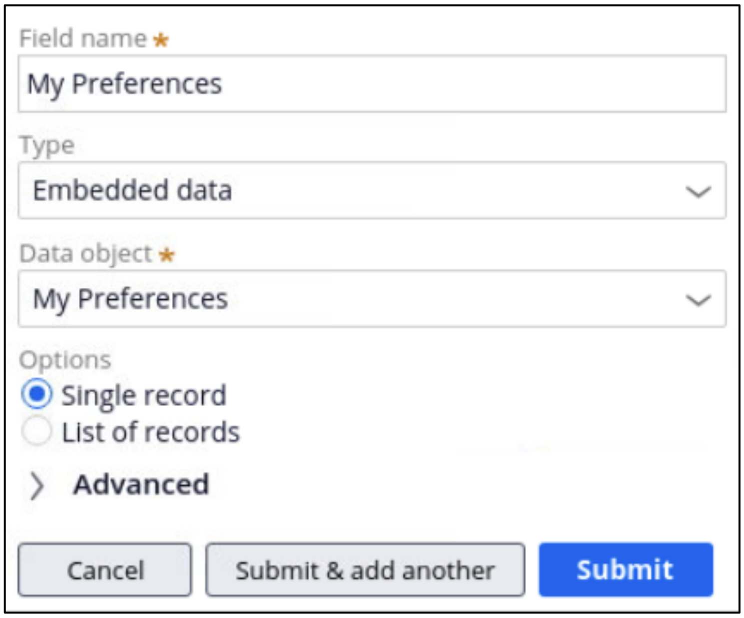


5. Enter **My Preferences** as the **Data object** name and click **OK.**

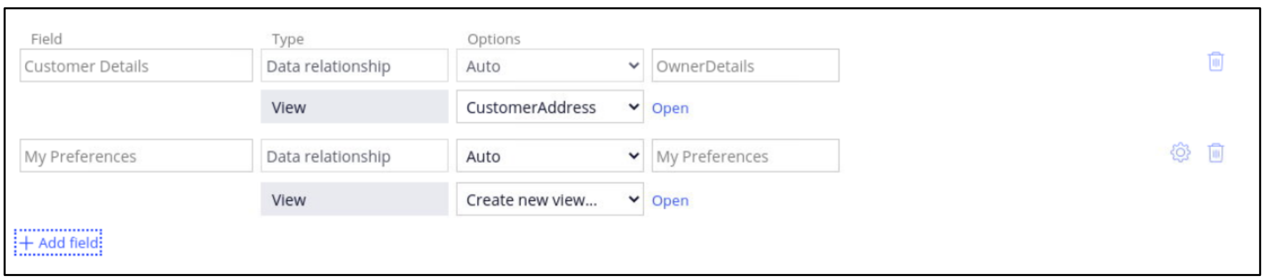


6. Leave the Options field as **Single record** as we are creating a page property here. Choose multiple records in case of a page list.

   The screen appears as below:



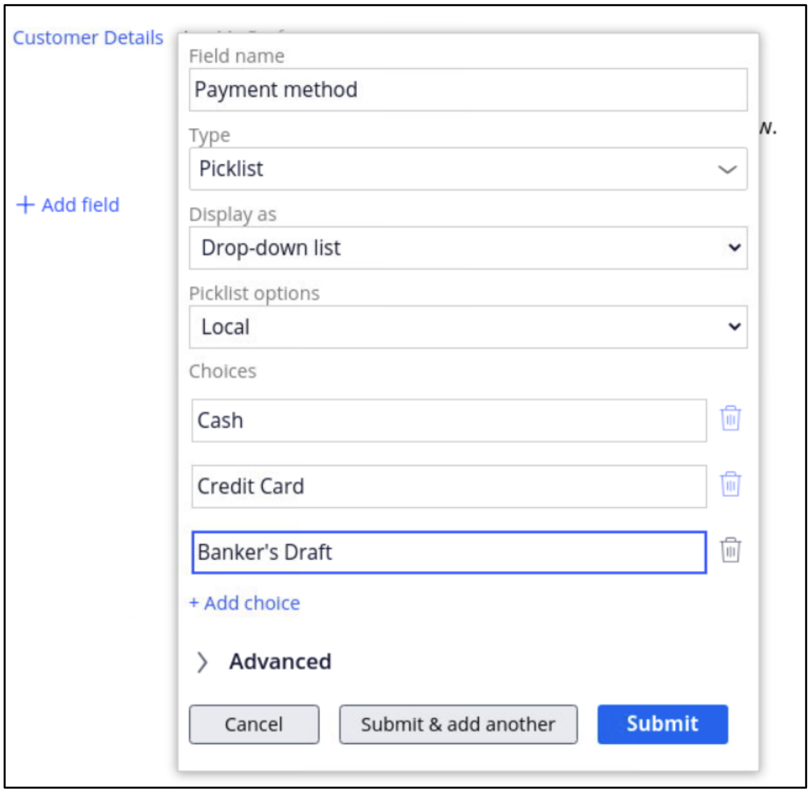
Click **Submit** and the screen appears as below.



7. Click the **Open** link next to **Create new view**, enter **My Preferences** as the **View name** and click **Create**. The following appears:

8. Click +Add Field and enter `Payment method` as the **Field name** and select **Picklist** as the **Type**.

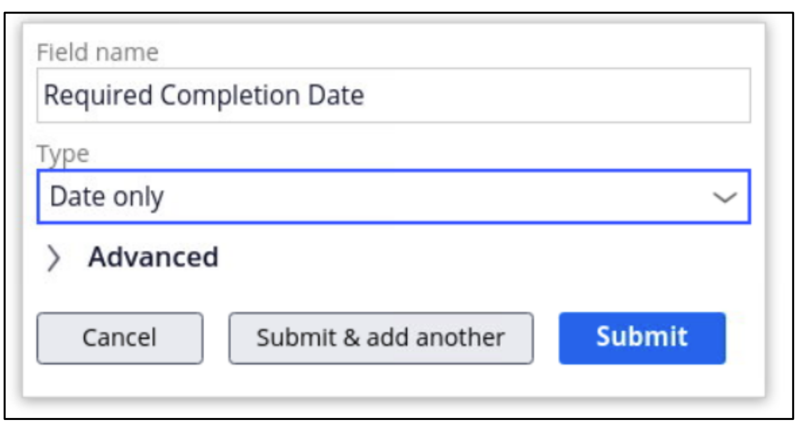
   Under choices click on **+Add Choice** and add `Cash, Credit Card,` and `Banker's Draft.`

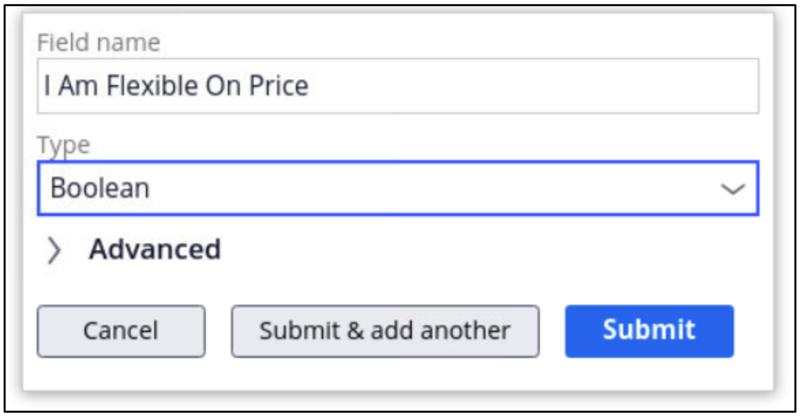


9. Click **Submit**.

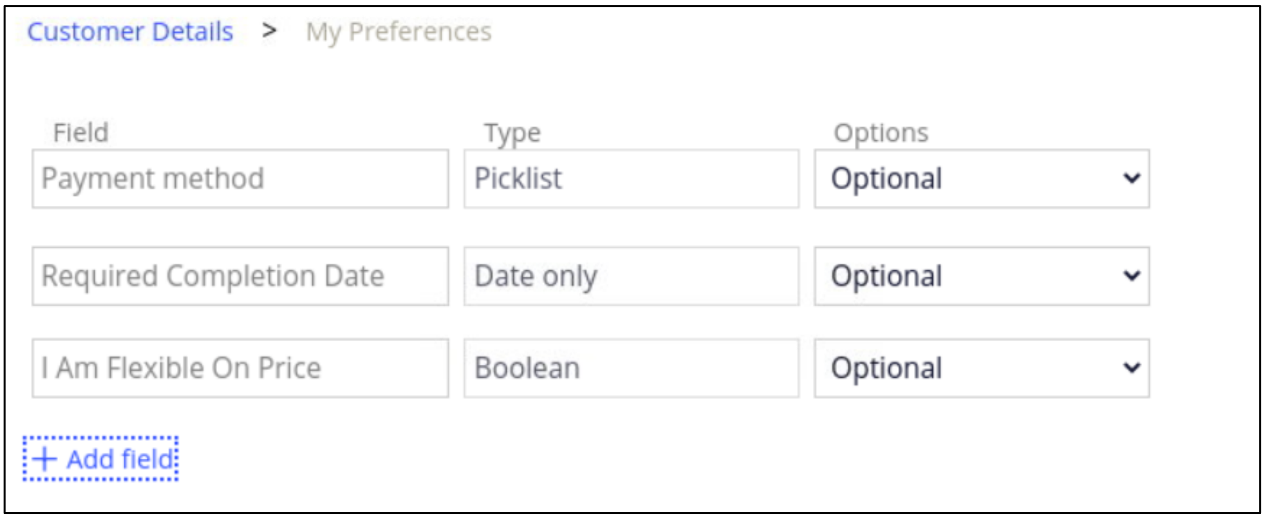
10. Add the following additional fields.

Field Name	Type
Required completion date	Date only
I am flexible on price	Boolean





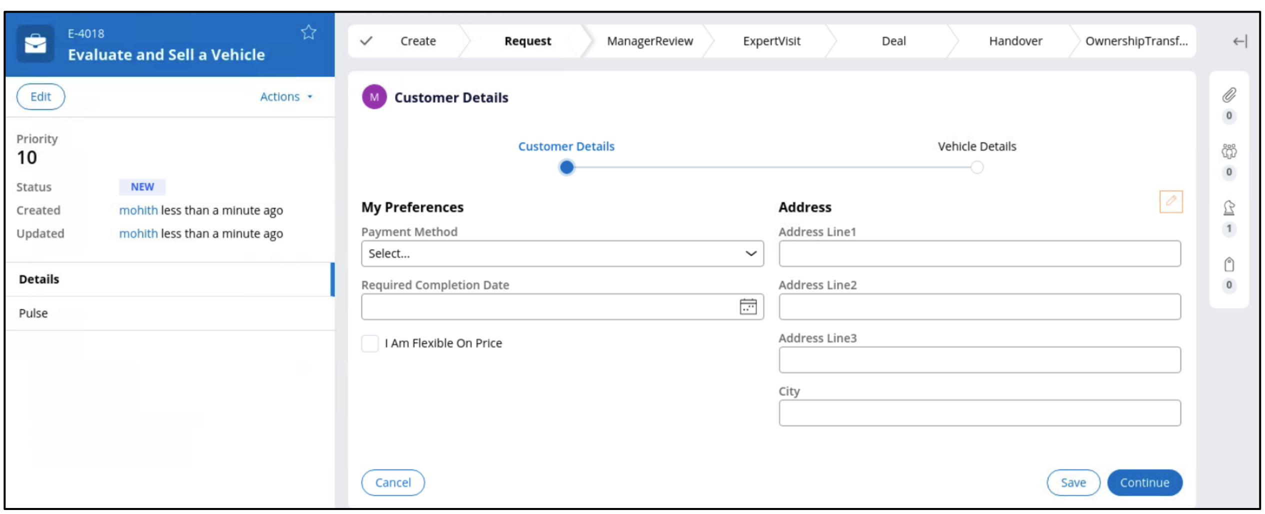
Three fields should now appear.



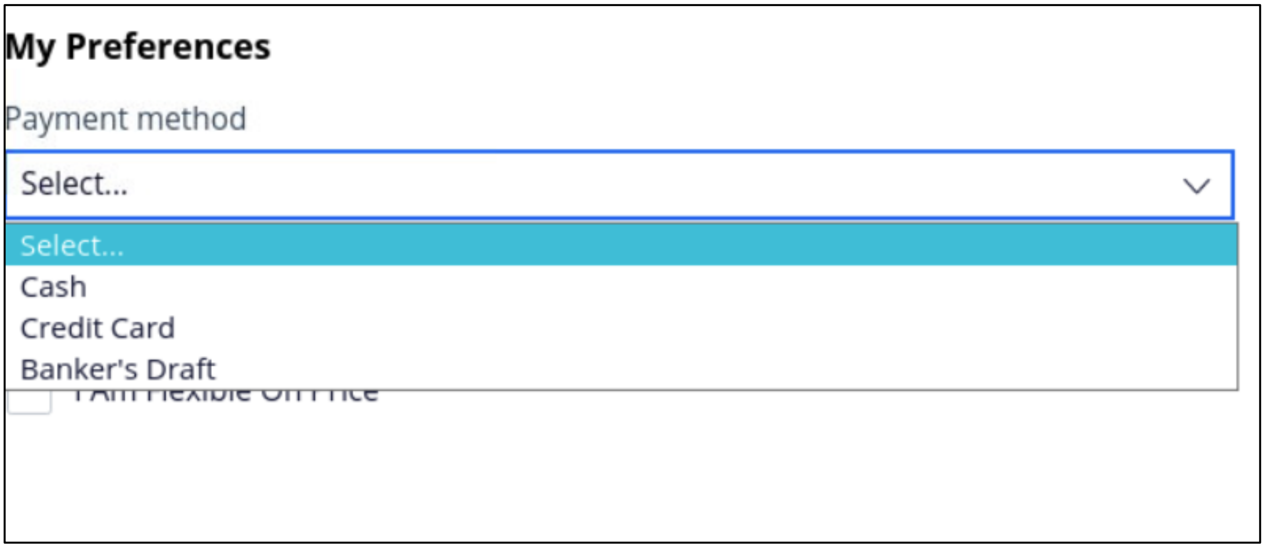
11. Click **Submit** at the bottom of the window.

Task 3: Verify your work

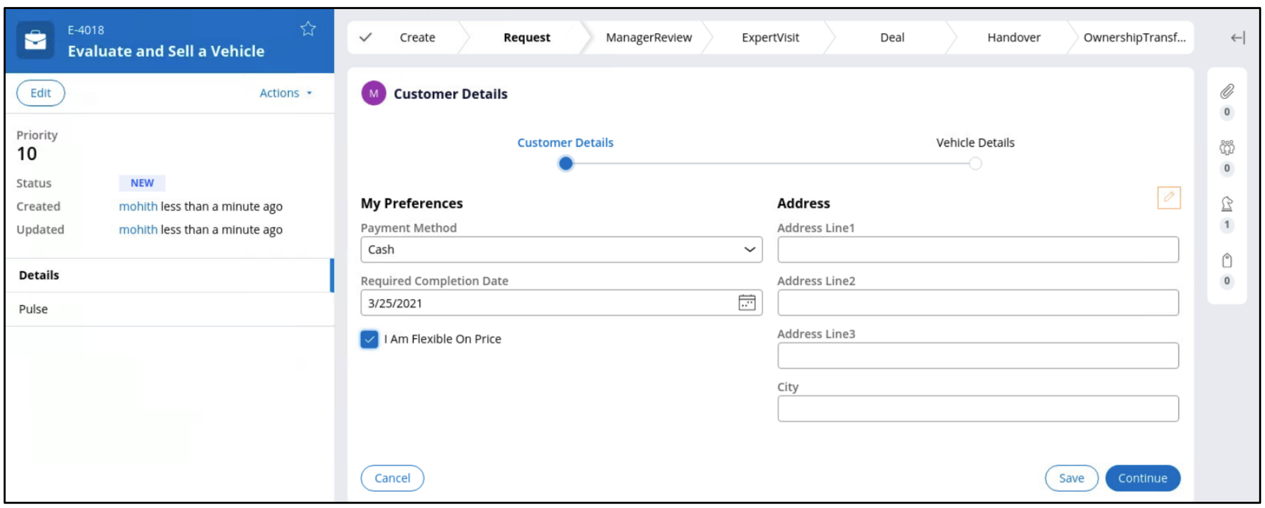
1. Click **Save and run** to start a new case.



2. Select the Payment method dropdown to see the choices.



3. Select values of your choice for My Preferences. The view should like this:



4. Close all forms.

5. Log off.

Validation

Scenario

When we add Vehicle Details in a new request for the evaluation and selling of a vehicle the user is currently only attaching an image of the vehicle. The client would like us to capture additional important details that are important to its evaluation process. Further, we need to make sure that the customer adds the correct information to the case for the car estimate calculations. We will accomplish this by first adding the following fields to the Vehicle Details view:

- Type of Vehicle
- Make of Vehicle
- Model of Vehicle
- Date of Purchase
- Kilometers on Vehicle
- Expected Price

After adding the above fields to the view, you need to validate the following fields with the respective criteria:

- Date of Purchase value needs to be a past date
- Kilometers on Vehicle needs to be greater than 0
- Expected Price needs to be greater than 0

Use the following credentials to log in to the exercise system:

Role	Username	Password
Administrator Engineer	**Victor@Validation**	**rules**

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development

Login as the developer to add this change to the case type.

Task 2: Add fields to the Vehicle Details view

As an Administrator Engineer operator, locate the Vehicle Details view of the Evaluate and Sell a Vehicle case type and add to this view the fields indicated above.

Task 3: Create a validate rule and add condition logic with messages

As an Administrator Engineer, use Dev Studio to create a Validate rule and add the conditions that meet the criteria indicated above for the three fields. You will need to reference the Validate rule in the Flow Action view for the Vehicle Details section and verify that the validation works per the client's expectations.

Task 4: Verify the Validate rule

Run an Evaluate and Sell a Vehicle case and input incorrect values for the fields configured with validation

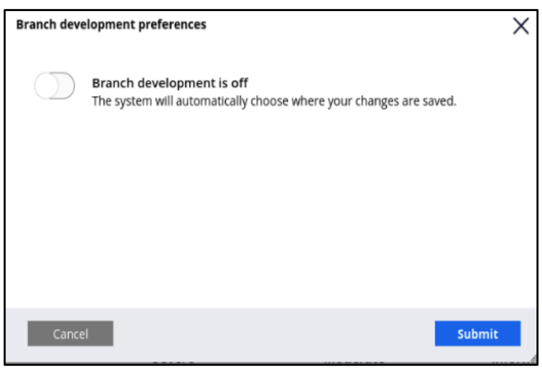
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

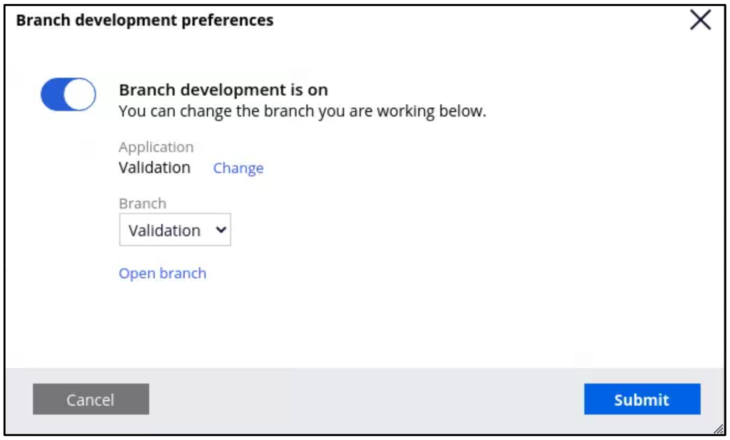
Task 1: Login and enable branch development

1. Log in using the credentials **Victor@Validation** and **rules**.
2. From the title bar click the **Toggle branch development** button.

The following appears:

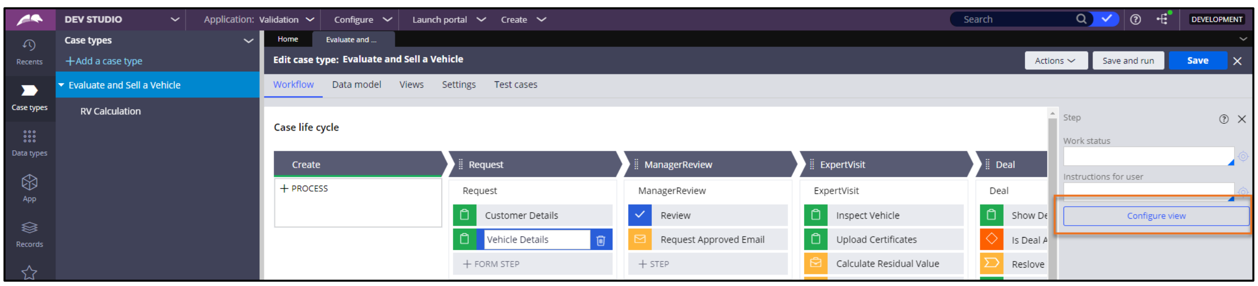


3. Move the slider to turn **branch development on**.
4. From the **Branch** dropdown ensure that **Validation** is selected and click **Submit**.



Task 2: Add Fields to the Vehicle Details View

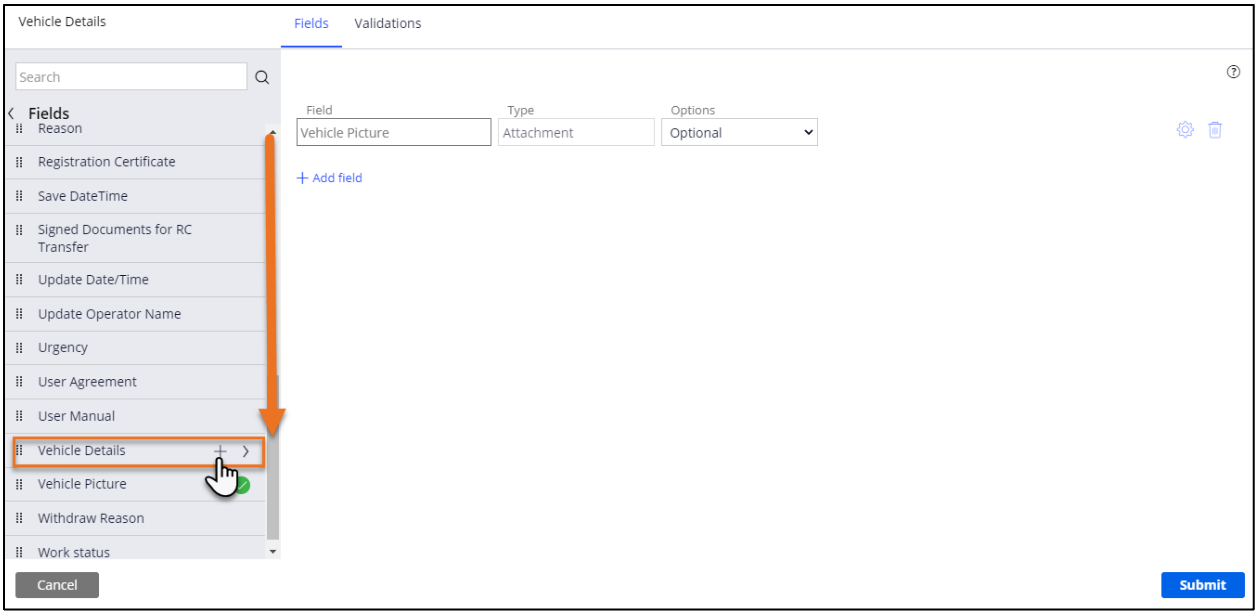
1. In the explorer panel, click the **Case types** designer. Click the **Evaluate and Sell a Vehicle** case type. In the Case life cycle select the **Vehicle Details** step in the **Request** stage and then click **Configure view** in the properties panel on the right.



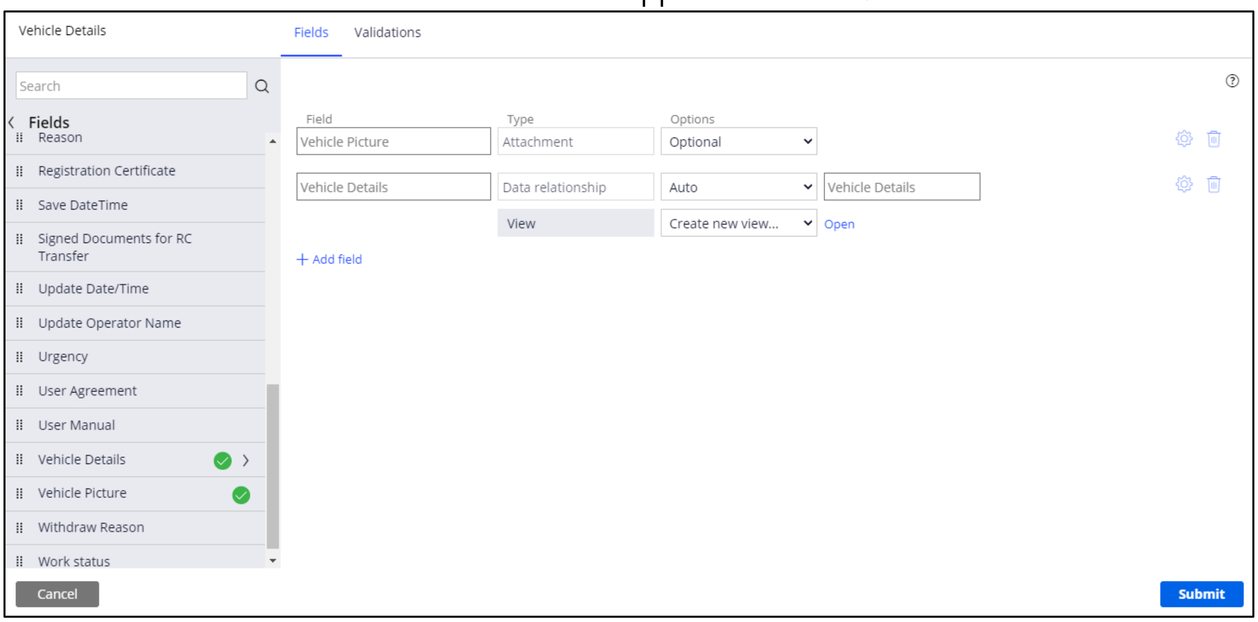
2. In the Vehicle Details view form, click the icon to the right of Fields to view relevant fields for this record.

3. Using the scroll bar in the Fields navigation frame, scroll down until you find **Vehicle Details**.

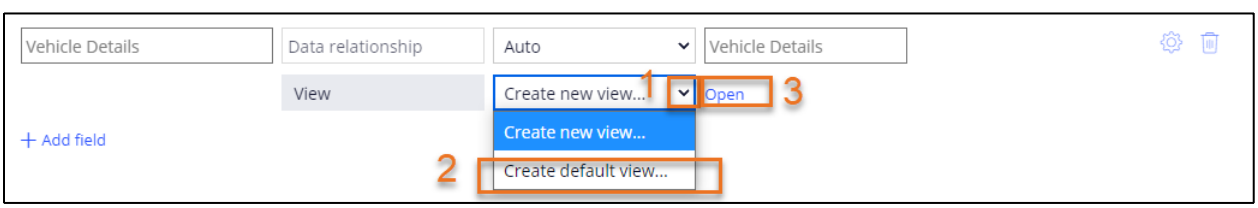
4. Hover over **Vehicle Details** and a + icon will appear. Click the icon to **Add to view**.



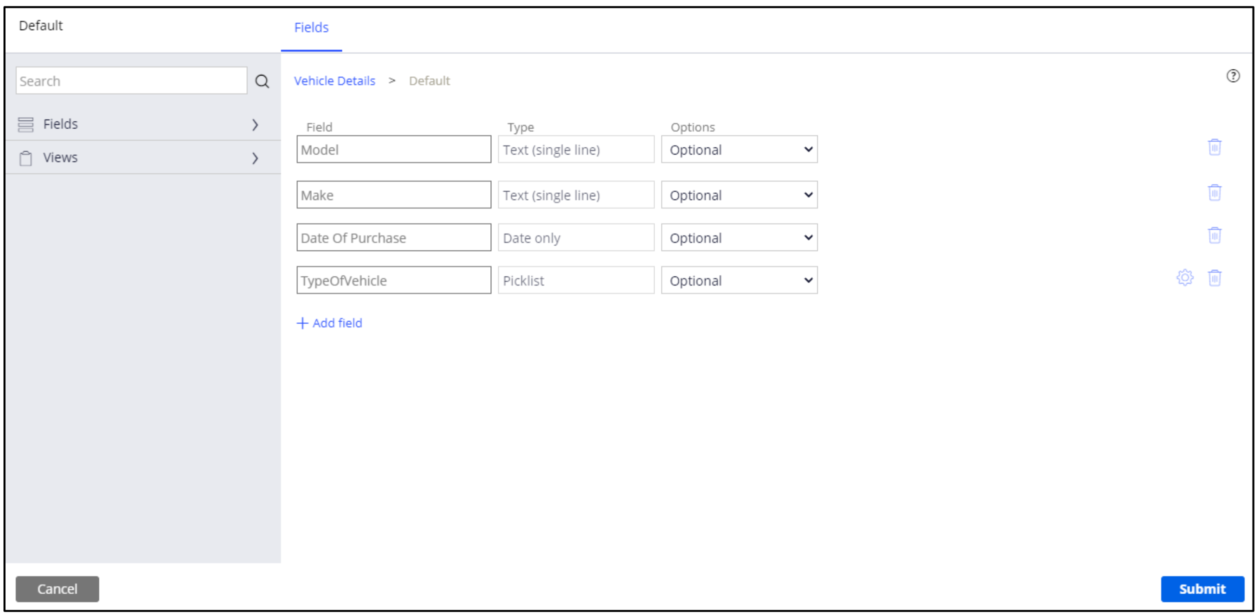
The Vehicle Details view form should now appear as follows:



5. In the View Options field:
    1. Open the **drop down**
    2. Select **Create default view**
    3. Click **Open**

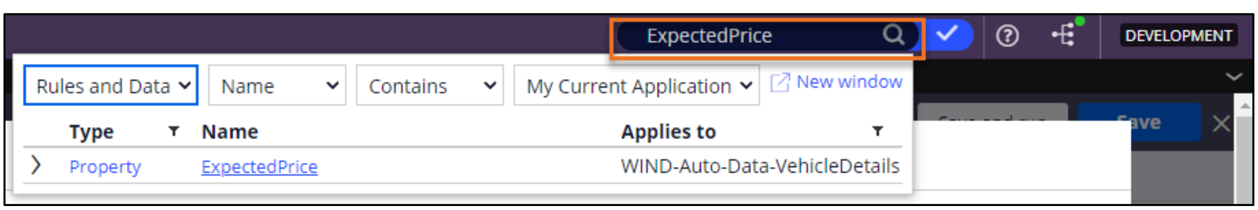


6. The following fields will prepopulate on the Default view form:
    - Registration Number
    - Model
    - Make
    - Colour
    - Fuel Type
    - Date Of Purchase
    - TypeOfVechicle
7. Using the **trash bin icon** remove **Registration Number, Color, and Fuel Type** fields from the view. The resulting form should look like the following:

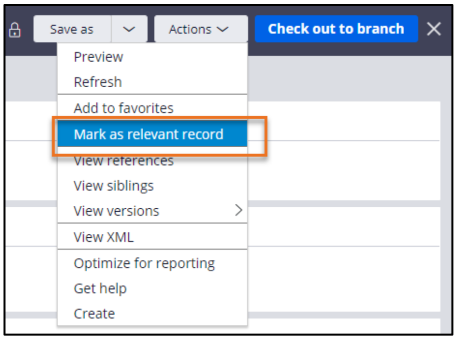


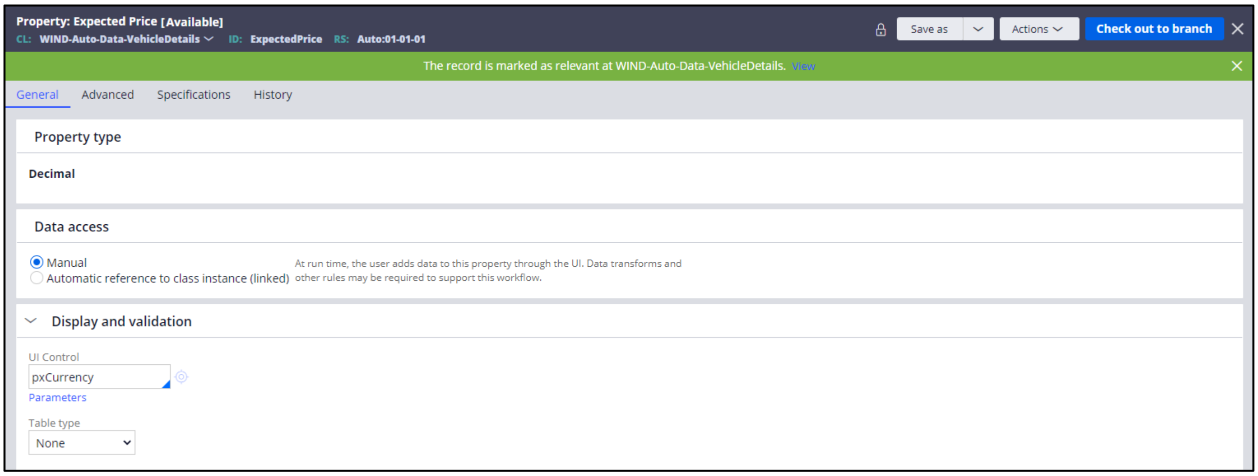
TIP: Only properties marked as relevant records appear by default.

8. Search for the **ExpectedPrice** property and open the **Property rule form**.



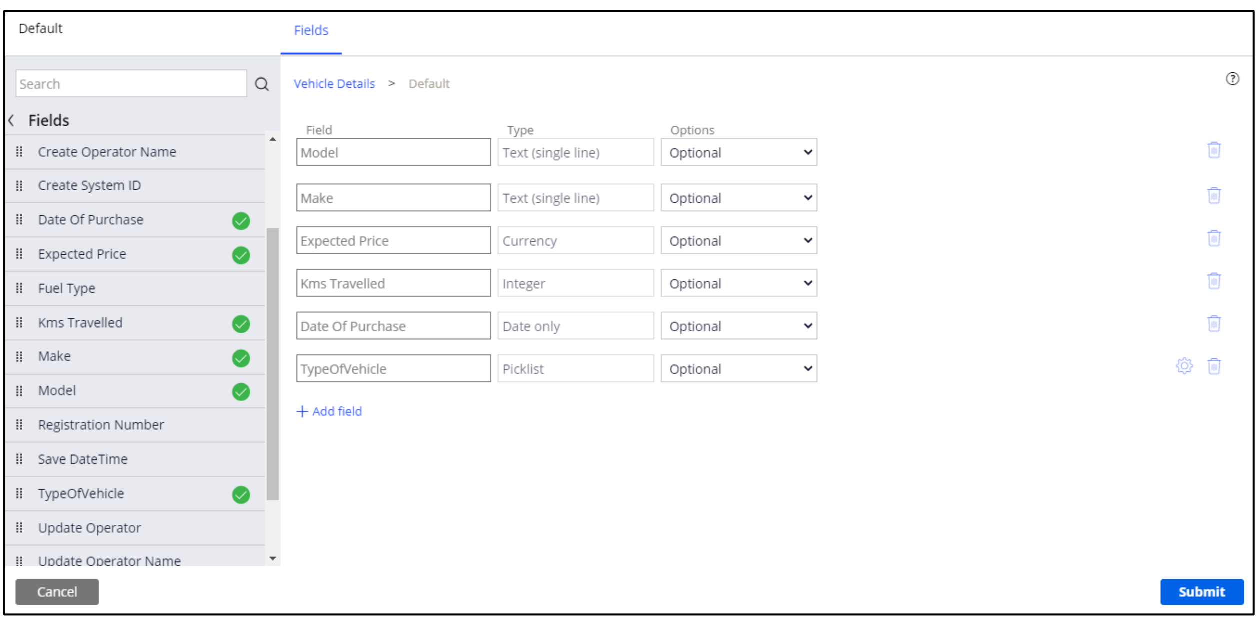
9. From **Actions**, select **Mark as relevant record** as shown in the following image.





10. Repeat steps 8 and 9 for the **KmsTravelled** property.

11. Navigate back to the **Evaluate and Sell a Vehicle** view configuration and add **Expected Price** and **Kms Travelled** fields to Vehicle Details View by selecting from Fields in the navigation panel on the left.

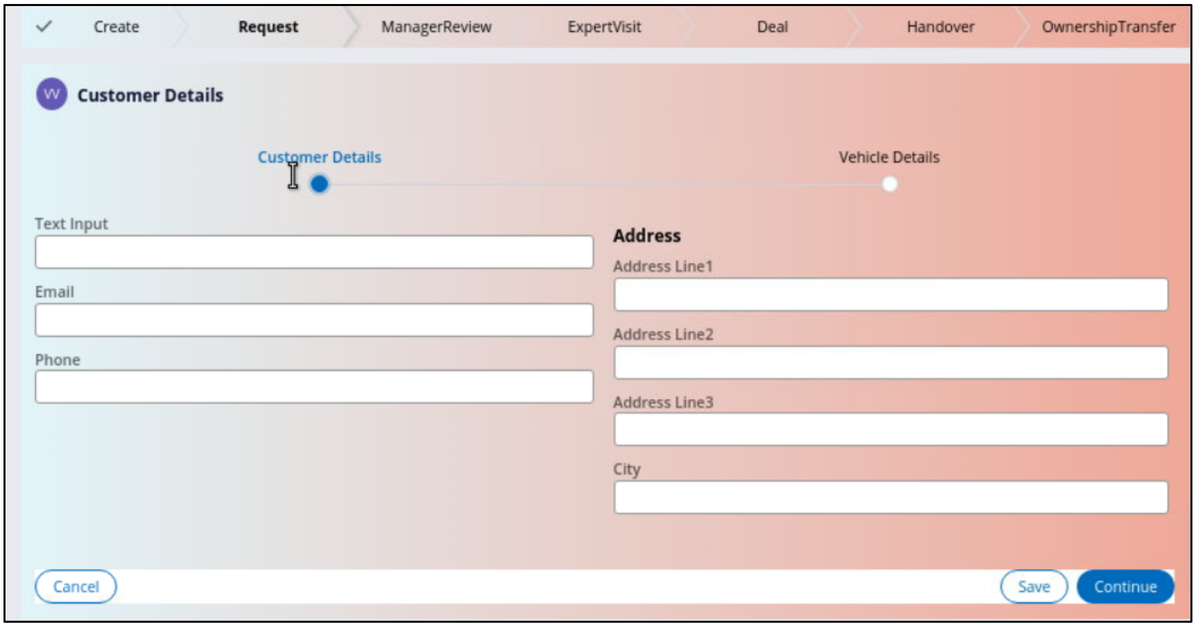


12. Click **Submit**.

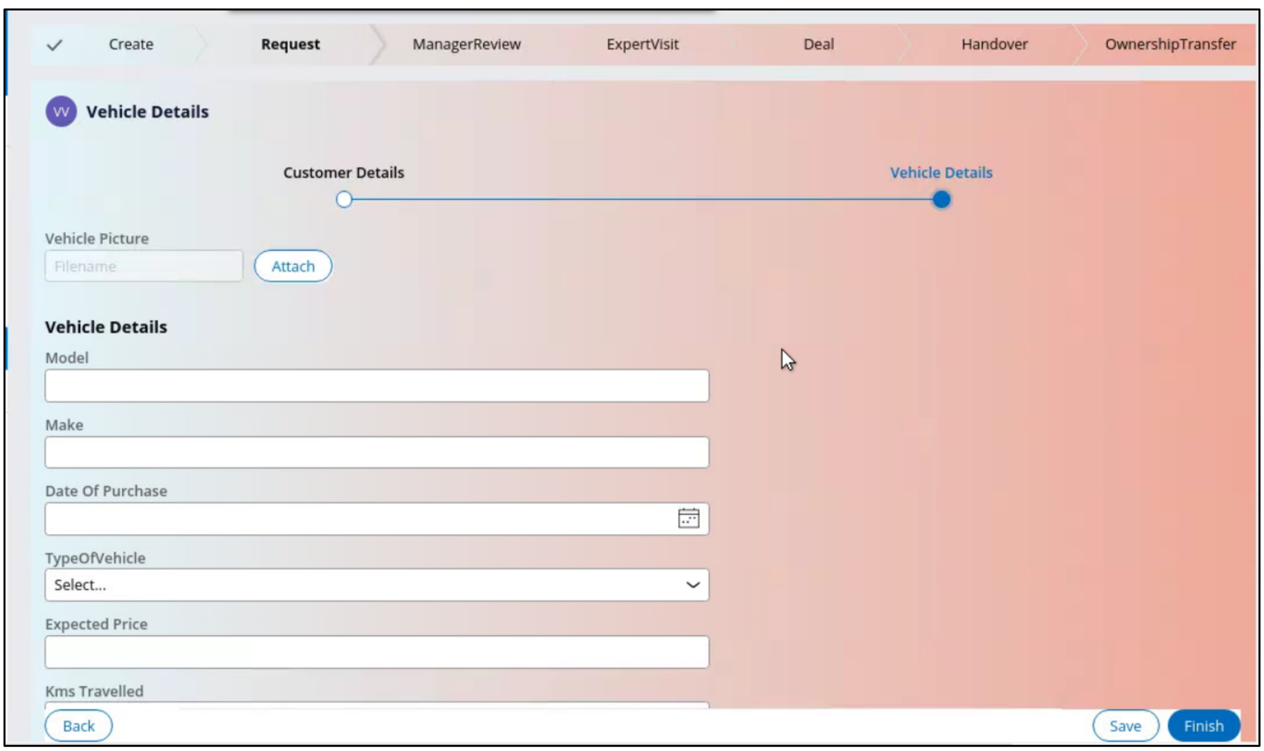
Note: Vertical order of your fields is not important at this time. Any order will do.

13. Click **Save and run** to create a **New: Evaluate and Sell a Vehicle** case.

14. Click **Continue** to see the updated **Vehicle Details** view.



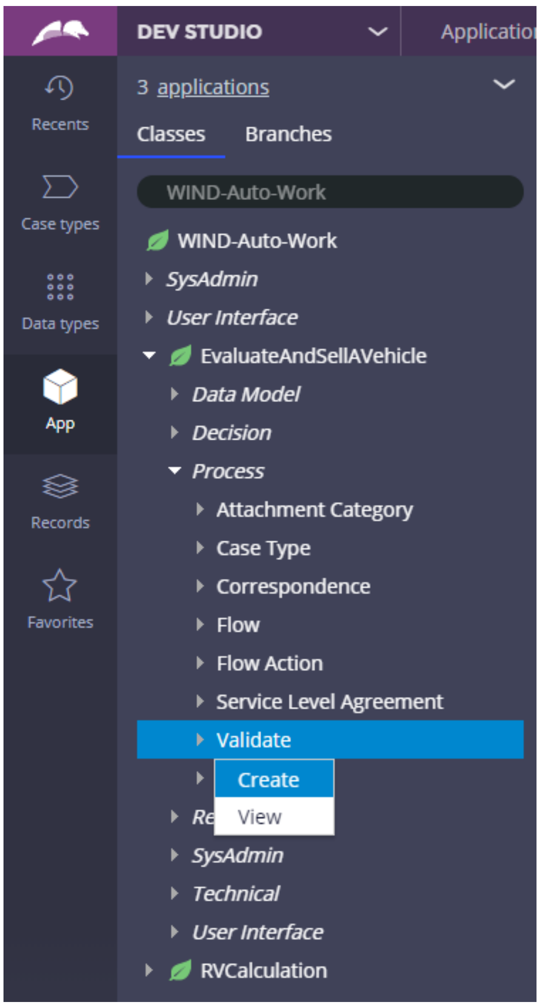
15. Enter values in the available fields and continue and click **Finish**.



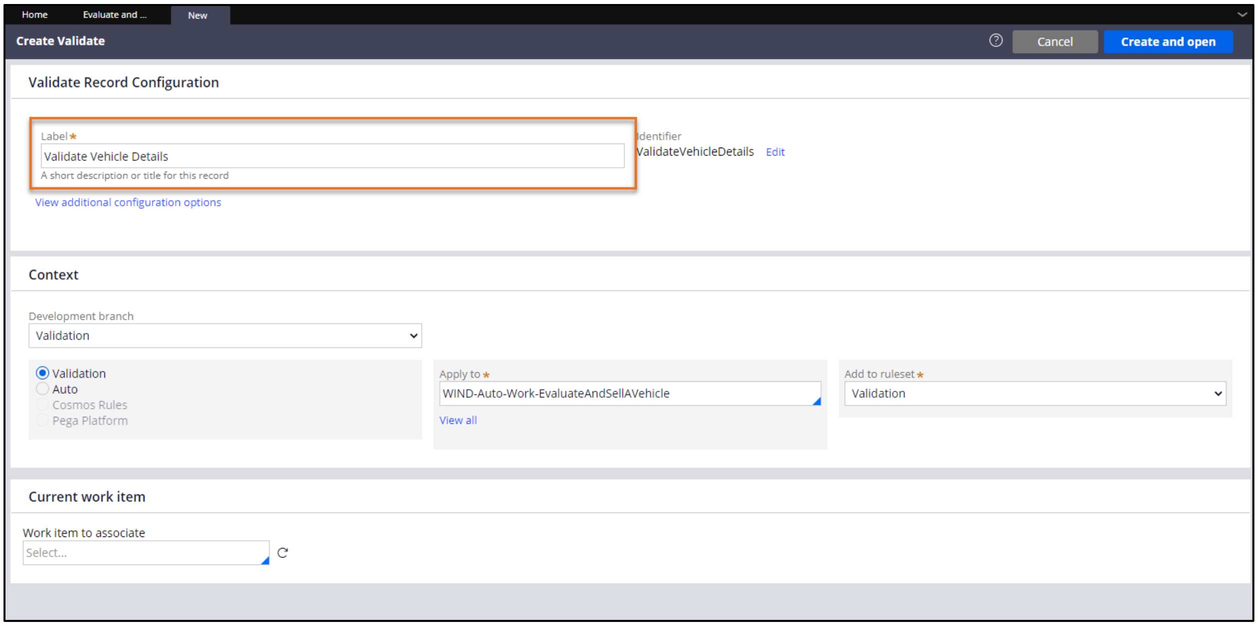
NOTE: In the next task we will add the validation rule which checks for the proper date, kilometers travelled and price.

Task 3: Create a Validate rule and add logic and messages

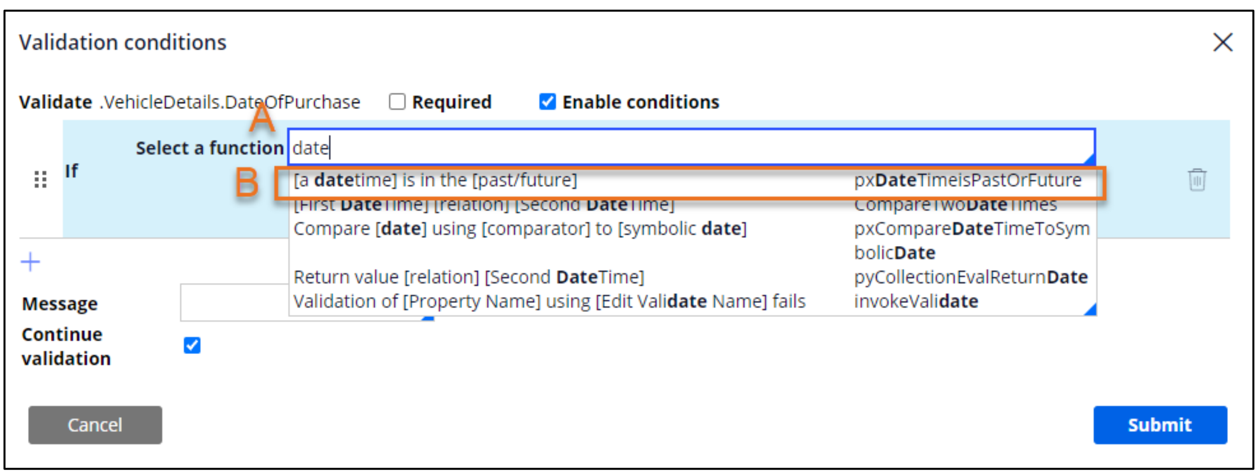
1. In **DEV STUDIO** select the **App explorer** from the explorers panel on the far left.
    a. Expand the **EvaluateAndSellAVehicle** class by clicking the small triangle icon on the left of the class name.
    b. Expand the **Process** category to see the rule types.
2. **Right-click** on the **Validate** type and select Create from the menu choices. (Use the following image for navigation reference.)



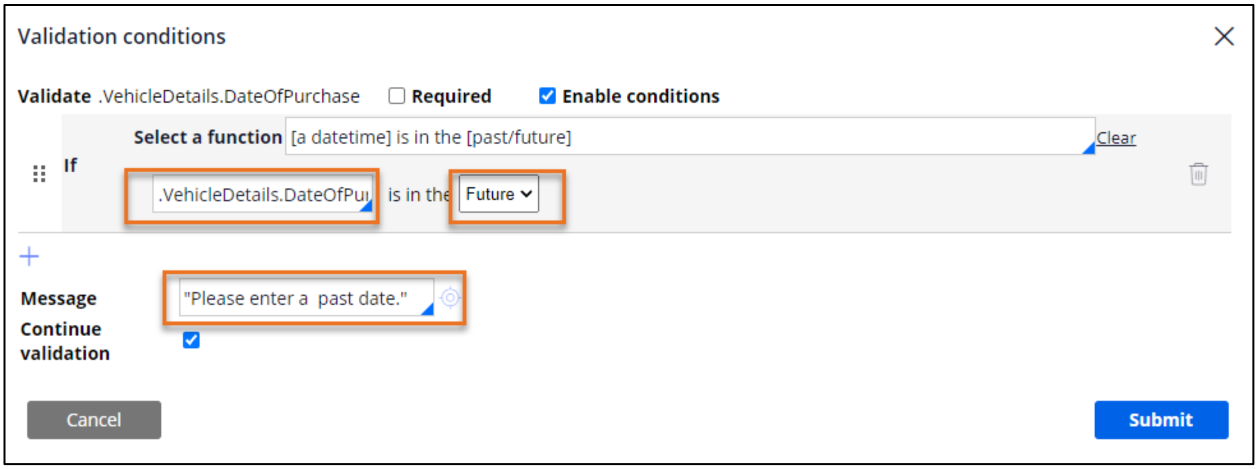
3. In the Validate Record Configuration form, enter **Validate Vehicle Details** for the Label and then click **Create and open**.



4. The Validate rule form appears. In the **PROPERTY** field, add **.VehicleDetails.DateOfPurchase** as the first property to validate.
5. Click the **Add** link to add the condition.
    a. **Type** the word **date** in the Select a function field to view a list of available date functions.
    b. **Select** function **[a datetime] is in the [past/future]**.

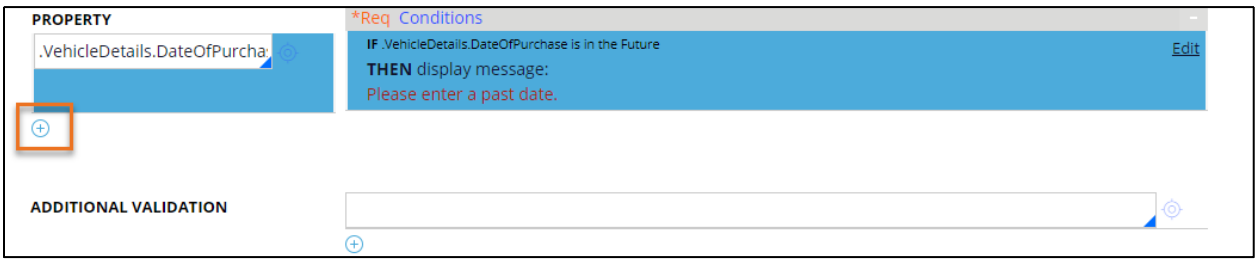


    c. Then add the above date property and select Future. Lastly, in the Message enter **"Please enter a past date."**

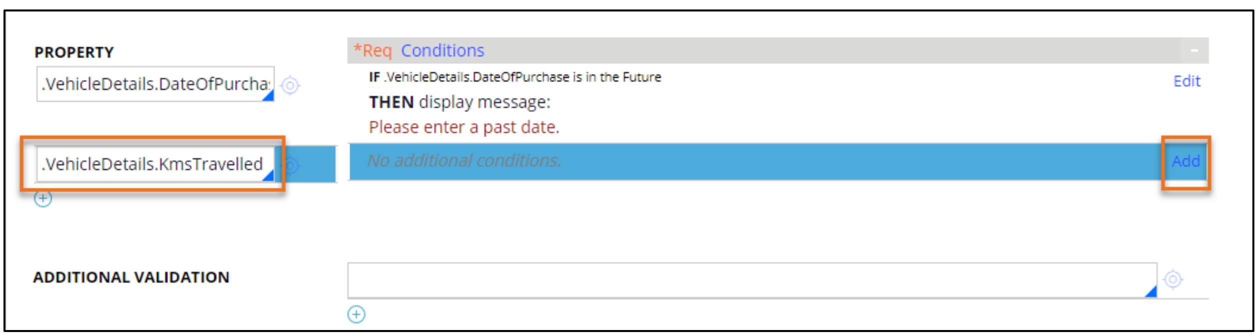


d. Please click **Submit** to close the condition.

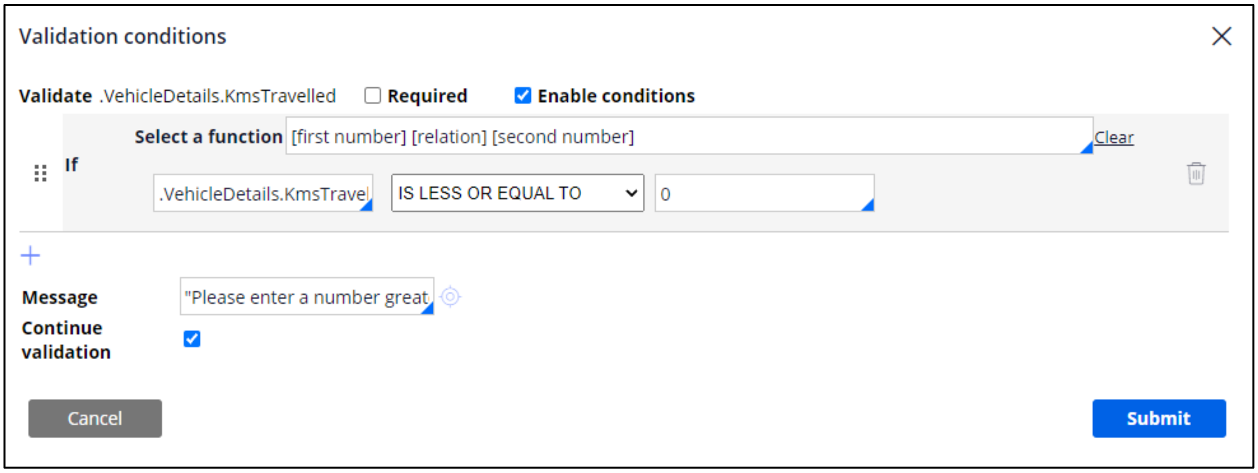
6. Add another property to validate by clicking the plus icon in the **PROPERTY** column.



7. In the input box, enter **.VehicleDetails.KmsTravelled** and then click **Add** to select a condition.



8. In the **Select the function** field, select **[first number][relation][second number]**
   a. Add the condition **.VehicleDetails.KmsTravelled IS LESS OR EQUAL TO 0**
   b. In the Message field, enter **"Please enter a number greater than 0"**
   c. The Validation conditions form should look like the following image:

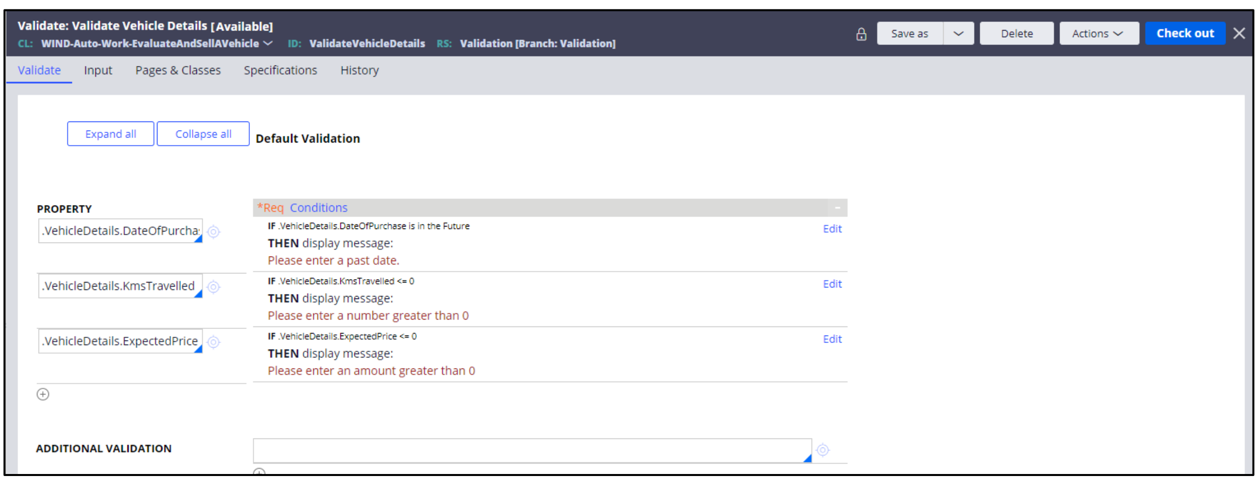


d. Click **Submit** to close the Validation conditions form.

9. Repeat steps 5-7 to validate the property **.VehicleDetails.ExpectedPrice** and conditionalize the value. You may use as the message, **"Please enter an amount greater than 0."**

10. Click **Save**.

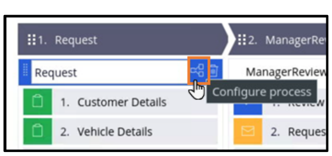
11. The completed Validate rule should look like the following:



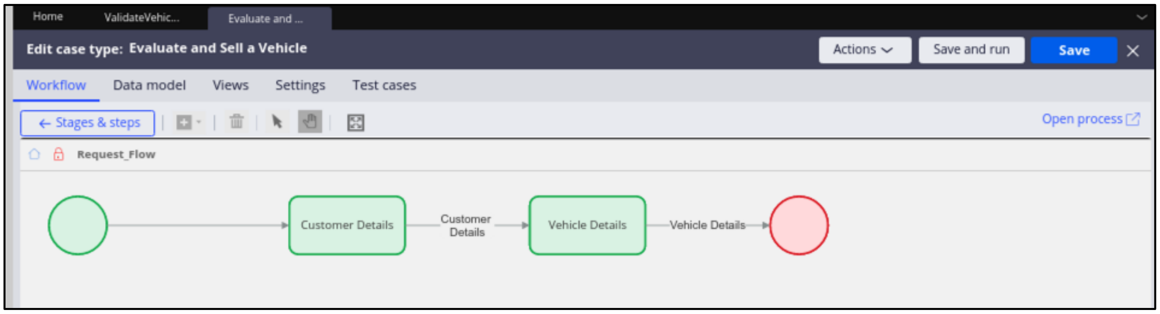
12. We need to reference the **ValidateVehicleDetails** Validate rule in the **VehicleDetails** Flow Action rule which references the **VehicleDetails** section rule.

13. In **DEV STUDIO**, select the **Evaluate and Sell a Vehicle** case type from the **Case types** explorer.

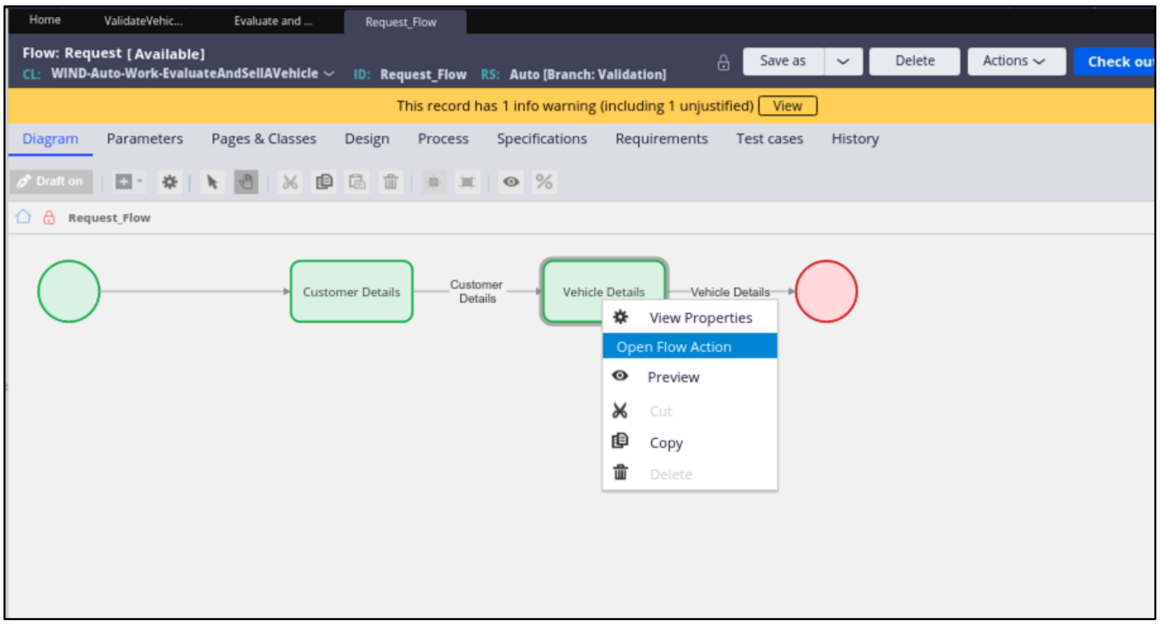
14. One way to access the **VehicleDetails** Flow Action rule is from the process that references it. Locate the Request process in the case designer and click on the process modeler icon . The Request process opens in the process modeler.



15. On the next screen click the **Open process** link located on the top right of the flow



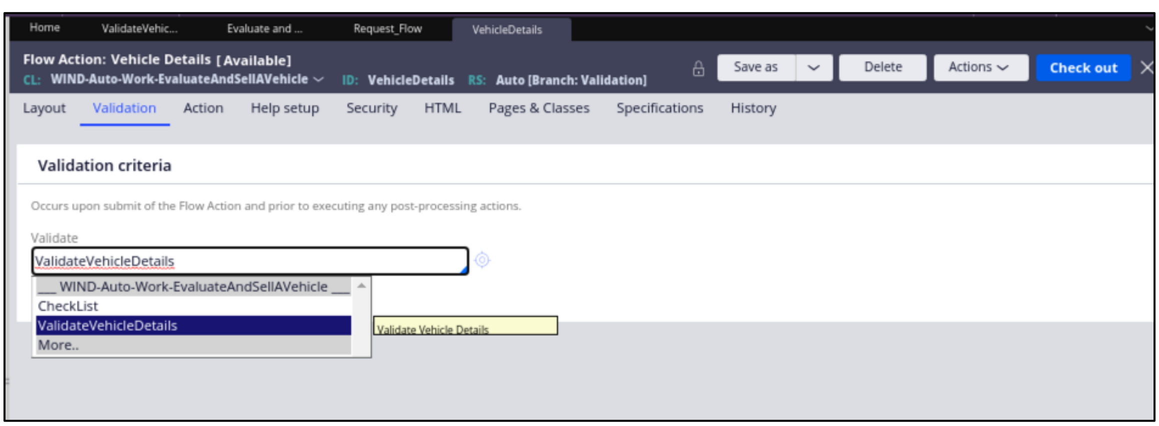
16. Once you have opened the process you may right click on the **Vehicle Details** assignment shape and open the associated **Flow Action rule**.



17. Check out the **Flow Action** rule

18. In the **Flow Action** rule click on the **Validation** tab and reference the **ValidateVehicleDetails** validate rule you just created.

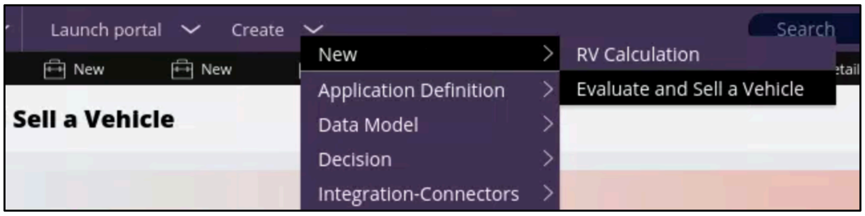
19. Save and check in the **Flow Action** rule.



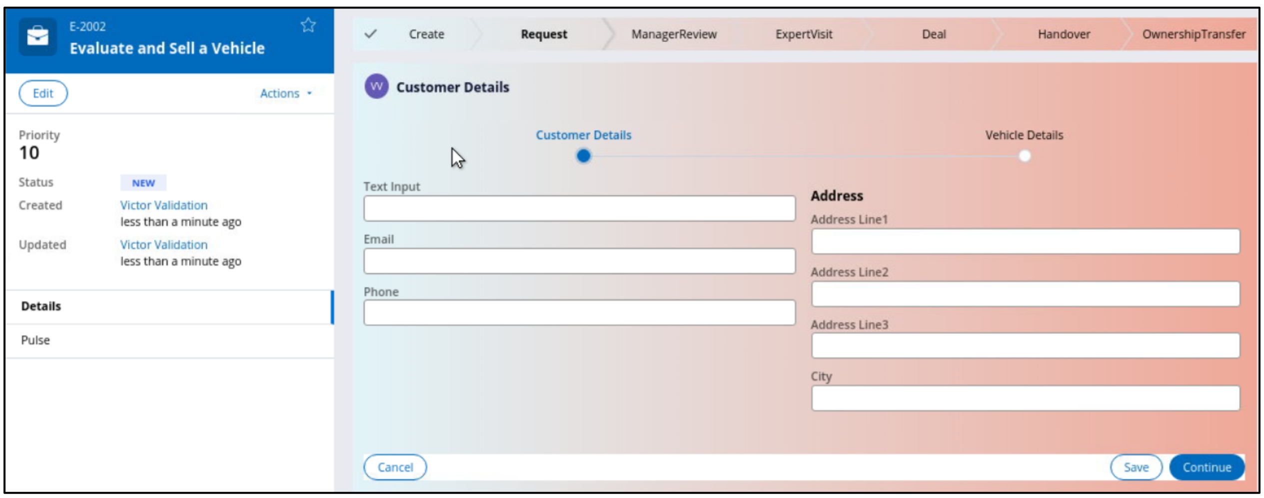
Task 4: Verify the Validate rule

As an Administrator Engineer operator review the case and confirm that the validation is correct.

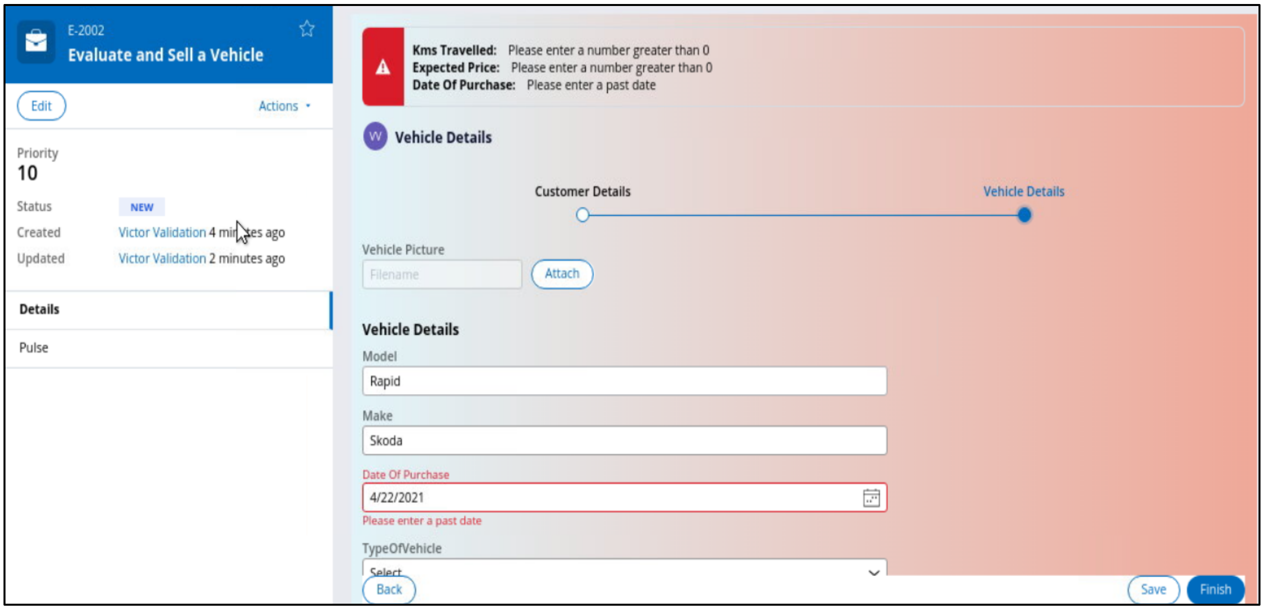
1. In Dev Studio select **Create** > **New** > **Evaluate and Sell a Vehicle**.



2. The application displays the below screen to collect **Customer Details** and **Vehicle Details**.



3. You may leave the **Customer Details** screen blank and click on the **Vehicle Details** tab. For the Vehicle Details please enter a future date for **Date of Purchase** and a negative number for **Kms Travelled** and **Expected Price**. Next click on **Finish** and you should see the validation messages for these three fields.


E-2002
Evaluate and Sell a Vehicle
Edit
Actions
Priority
10
Status
NEW
Created
Victor Validation 4 minutes ago
Updated
Victor Validation 2 minutes ago
Details
Pulse
Kms Travelled: Please enter a number greater than 0
Expected Price: Please enter a number greater than 0
Date Of Purchase: Please enter a past date
Vehicle Details
Customer Details
Vehicle Details
Vehicle Picture
Filename
Attach
Vehicle Details
Model
Rapid
Make
Skoda
Date Of Purchase
4/22/2021
Please enter a past date
TypeOfVehicle
Select
Back
Save
Finish

4. **Log off**.

Creating a data relationship

Scenario

The mayor of MyTown asks you, the town's project manager, to enable residents who report problemsonline to enter contact information and list any previous issues at the same site. You must add an embedded data field to the Service Request case type.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Application Developer	admin@CreateDataRel	rules

Your Assignment

Your assignment consists of the following tasks:

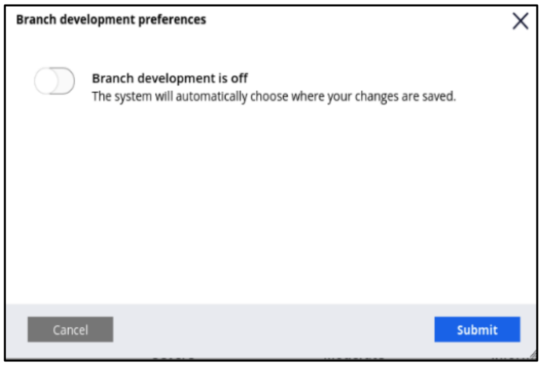
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

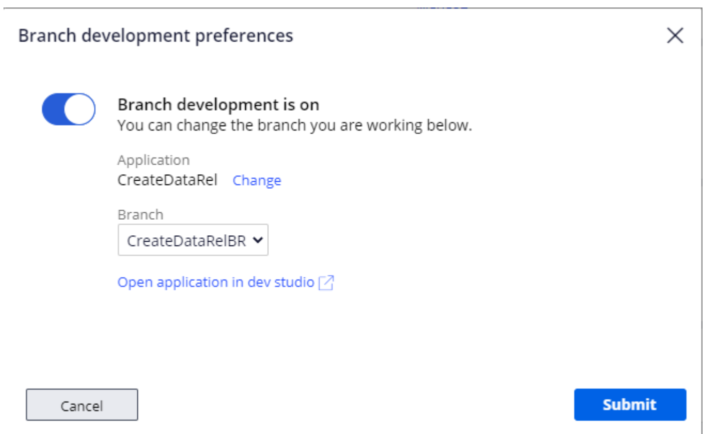
Task 1: Login and enable branch development

1. Log in using the credentials **admin@CreateDataRel** and **rules**.
2. From the title bar click the **Toggle branch development** button.

The following appears:

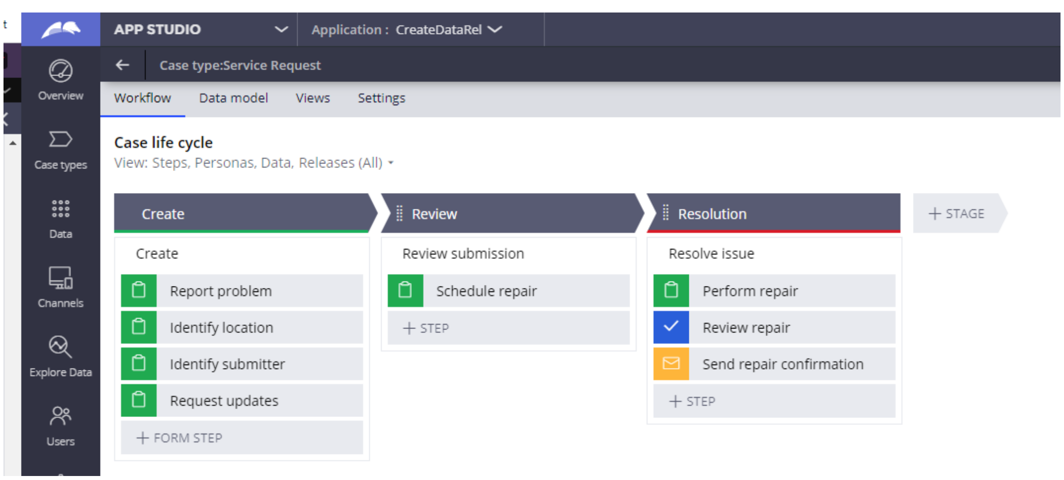


3. Move the slider to turn **branch development on**.
4. From the **Branch** dropdown ensure that **CreateDataRelBR** is selected and click **Submit**.

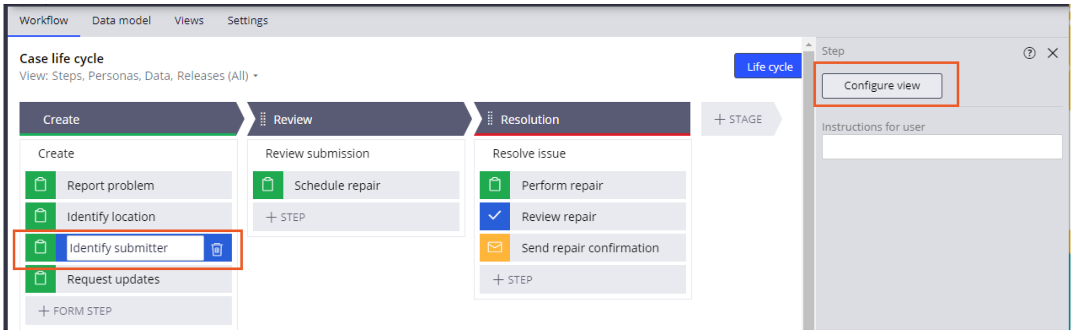


Task 2: Create the Embedded data field named Submitter information

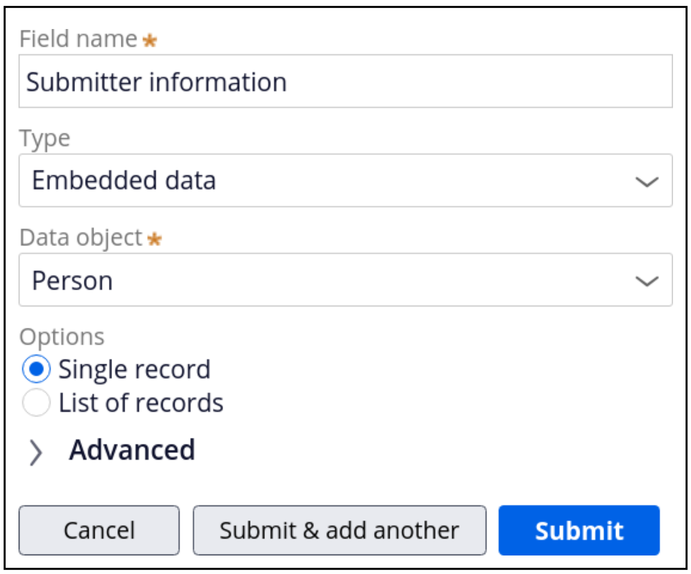
1. In the App Studio navigation pane, click **Case types > Service Request** to display the ServiceRequest case life cycle.



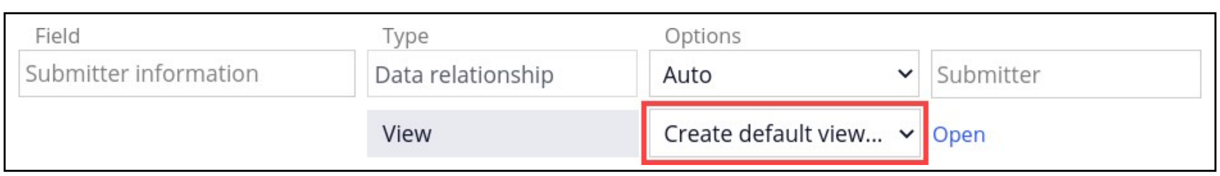
2. Select the **Identify submitter** step and on the right, click **Configure view** to configure the view of the step.



3. Click **+ Add field** and enter **Submitter information** to name the field.
4. From the **Type** drop-down, select **Embedded data**.
5. From the **Data object** drop-down, select **Person**

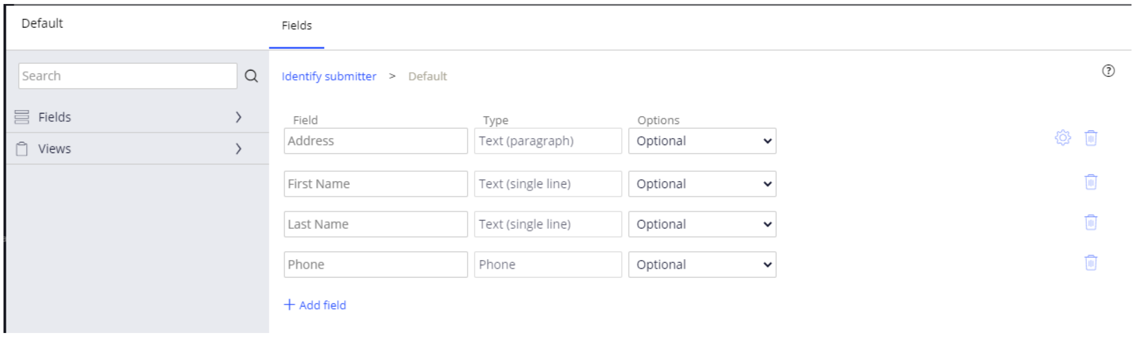


6. Click **Submit** to close the field configuration window and return to the **Identify submitter** view.
7. In the **Options** list, to the right of View, select **Create default view**.



8. Click **Open** to create fields within the embedded Submitter information data object.

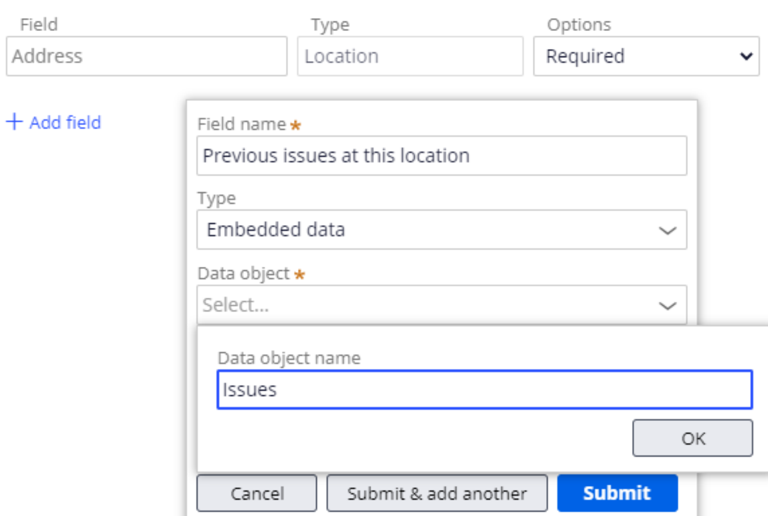
The fields associated with Person have been automatically added to the Default view.



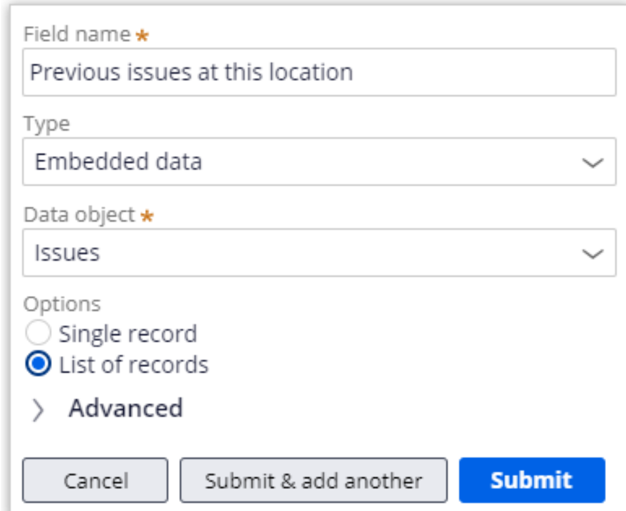
9. Click **Submit** to dismiss the Configure view window.
10. Click **Save** to save the case design.

Task 3: Create the Previous issues at this location multiple record data relationship

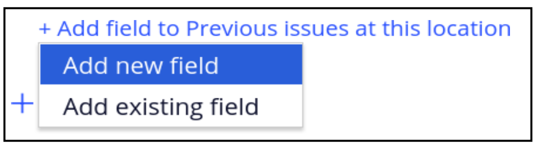
1. In the Service Request case type, click the **Identify location** step.
2. In the **Step** property pane to the right, click **Configure view** to configure the view of the step.
3. Click **+ Add field**.
4. In the **Field name** field, enter **Previous issues at this location** to name the field.
5. From the **Type** drop-down, select **Embedded data**.
6. From the **Data object** drop-down, select **Define new data object**.
7. Enter **Issues** in the **Data object name** field to create a new data object.



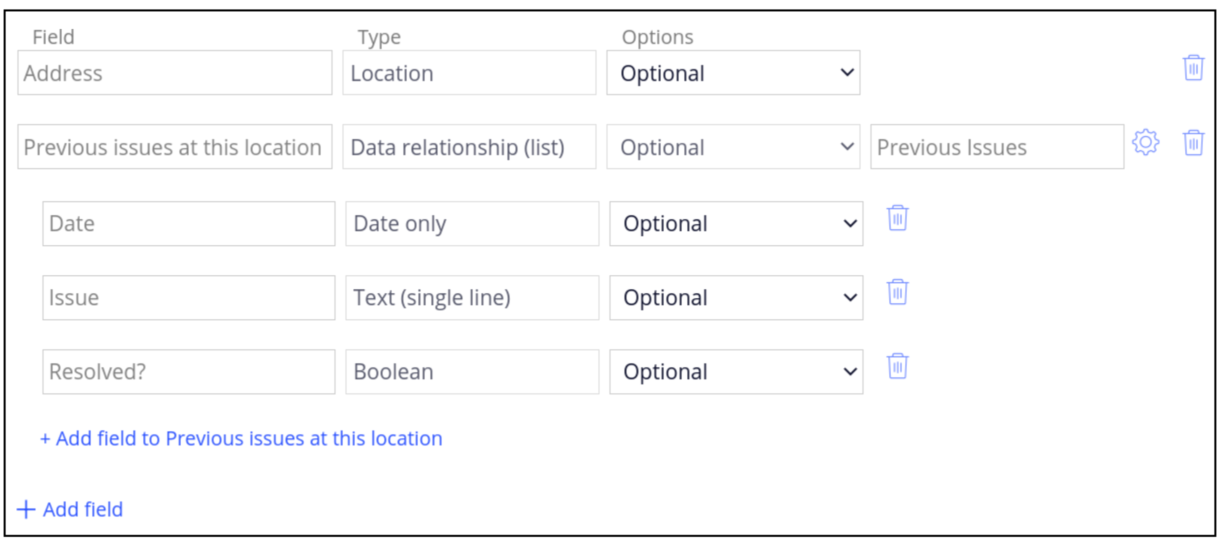
8. In the **Options** field, select **List of records**.



9. Click **Submit** to close the field configuration window and return to the Identify location view.
10. Click **+ Add field to Previous issues at this location > Add new field** option to display a newfield row.



11. Using the following image, add the necessary fields.

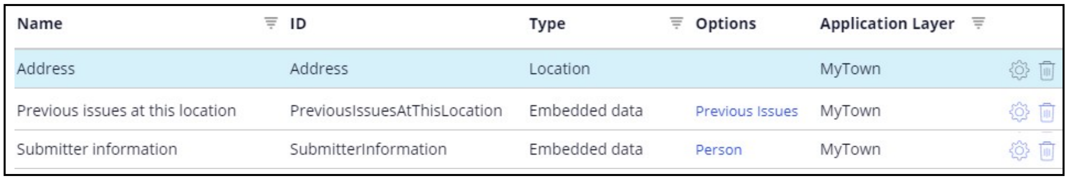


12. Click **Submit** to dismiss the view configuration window.
13. Click **Save** to save your work.

Task 4: Verify your work

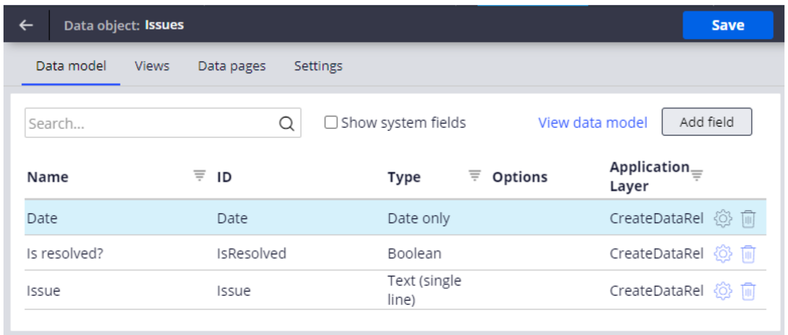
1. In the Service Request case type, click the **Data Model** tab to confirm that your fields

are displayed correctly. App Studio displays the top level of the Data Model. (Screenshot below has been filtered to show only data relationships)



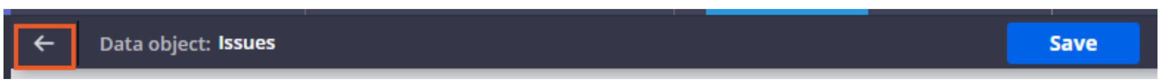
Name	ID	Type	Options	Application Layer
Address	Address	Location		MyTown
Previous issues at this location	PreviousIssuesAtThisLocation	Embedded data	Previous Issues	MyTown
Submitter information	SubmitterInformation	Embedded data	Person	MyTown

2. In the **Options** column, click **Issues** to see the data relationship details.



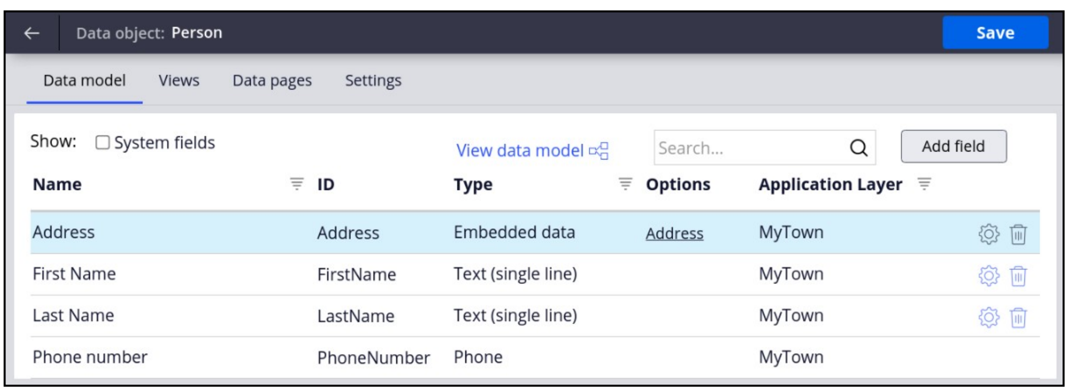
Name	ID	Type	Options	Application Layer
Date	Date	Date only		CreateDataRel
Is resolved?	IsResolved	Boolean		CreateDataRel
Issue	Issue	Text (single line)		CreateDataRel

3. In the upper left, click the **Back** icon ← to return to the case life cycle.



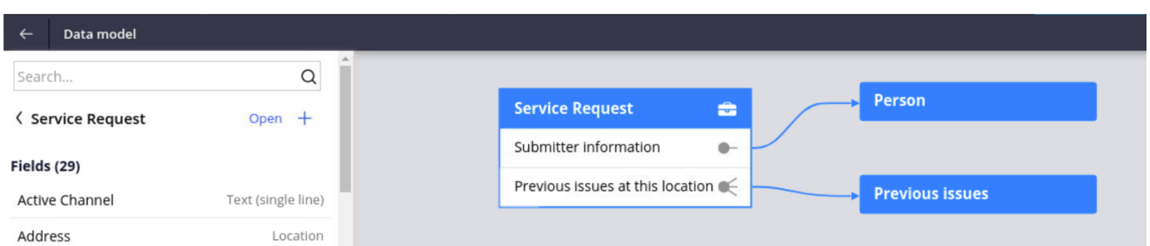
4. Click the **Data Model** tab to return to the Service Request data model.

5. In the **Options** column, click **Person** to see the data relationship details, note the furtherembedded **Address** data object.

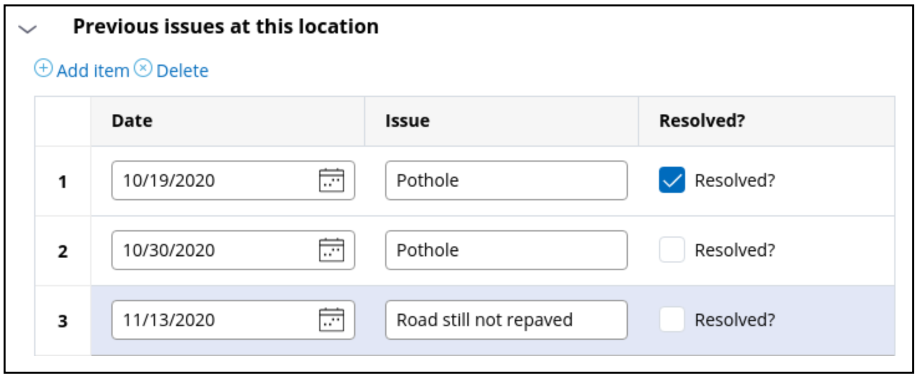


Name	ID	Type	Options	Application Layer
Address	Address	Embedded data	Address	MyTown
First Name	FirstName	Text (single line)		MyTown
Last Name	LastName	Text (single line)		MyTown
Phone number	PhoneNumber	Phone		MyTown

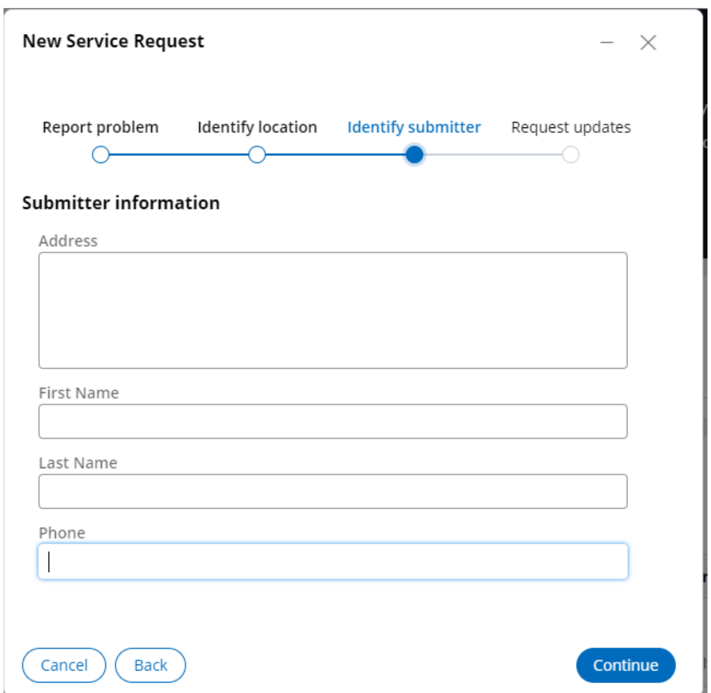
6. Clicking the **View data model** link will take you to an interactive, graphical representation ofthings, which will be covered in more detail later.



7. In the upper left, click the **Back** icon to return to the **Workflow** tab.
8. In the upper right, click **Save and Run**.
9. In the Report problem view, click **Continue** to advance to the **Identify location** view.
10. In the Identify location step, enter an address in the **Address** field and several issues tothe **Previous issues at this location** fields.



11. Click **Continue** and in the Identify submitter step, enter sample submitter details.



12. **Log Off**.

Declare Expressions

Scenario

For each customer using the services of the company to sell a vehicle, you are asked to optionally complete a form detailing the history of previous vehicles that you have owned and the selling price. The total price for all the vehicles is calculated and displayed.

To implement this requirement the appropriate field needs to be captured with the following information:

- Date of sale
- Make of car
- Model of car
- Amount it was sold for

You will update the view on the appropriate step of the case type to implement this view.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Administrator Engineer	AdminDeclareExp@auto	rules

Your Assignment

Your assignment consists of the following tasks:

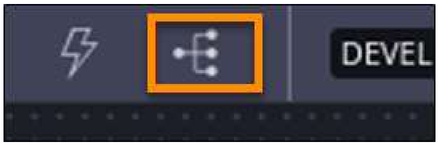
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

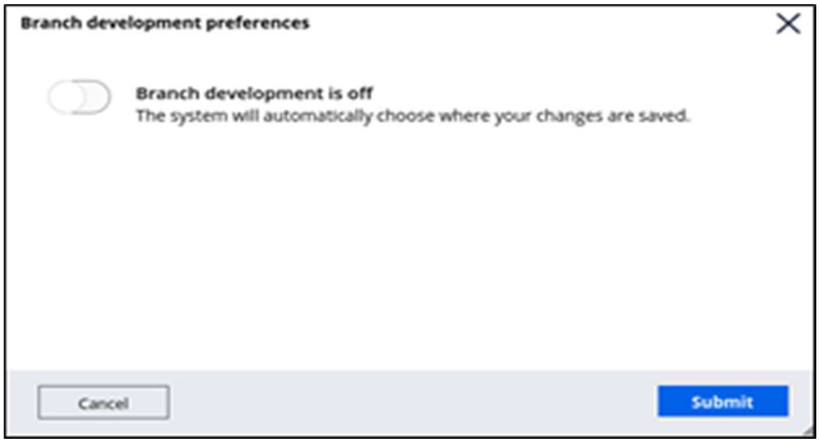
Task 1: Log in and enable branch development

As an Administrator Engineer operator, create a view to capture the customer's car selling history.

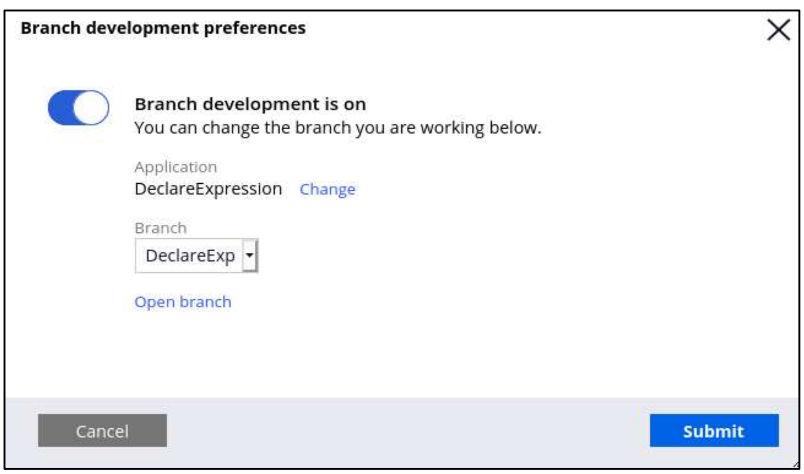
1. Log in and use the credentials **AdminDeclareExp@auto** and rules. You are logged into Dev Studio.
2. From the title bar click the **Toggle branch development** button.



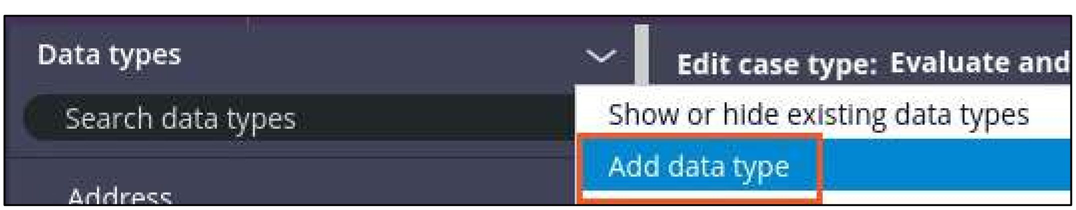
The following appears:



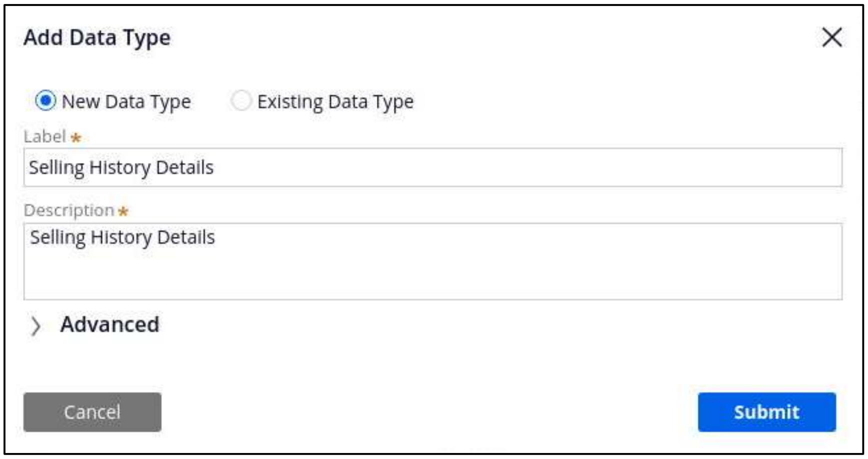
3. Move the slider to turn branch development on.
4. From the **Branch** dropdown menu, ensure that **DeclareExp** is selected and click **Submit**.



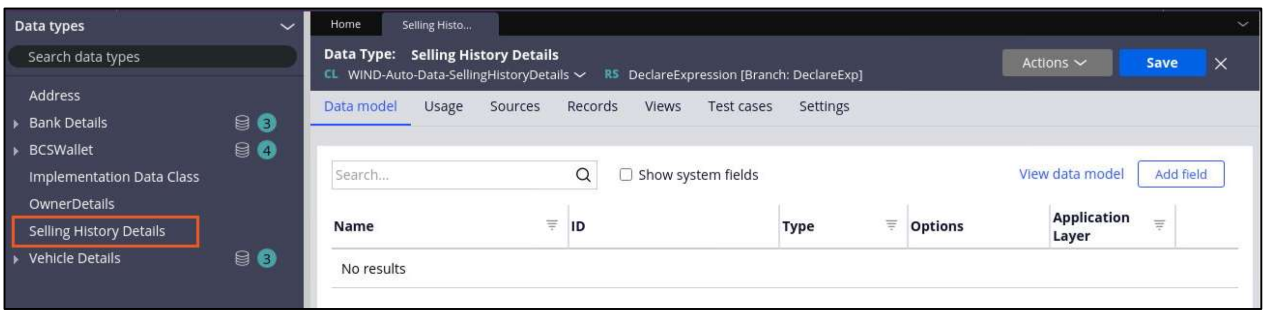
Task 2: Create the Request Status Data Type

1. From **Data types,** select **Add data type** from drop down.
2. 

3. Select **New Data Type**. Enter **Selling History Details**. **Click Submit**.

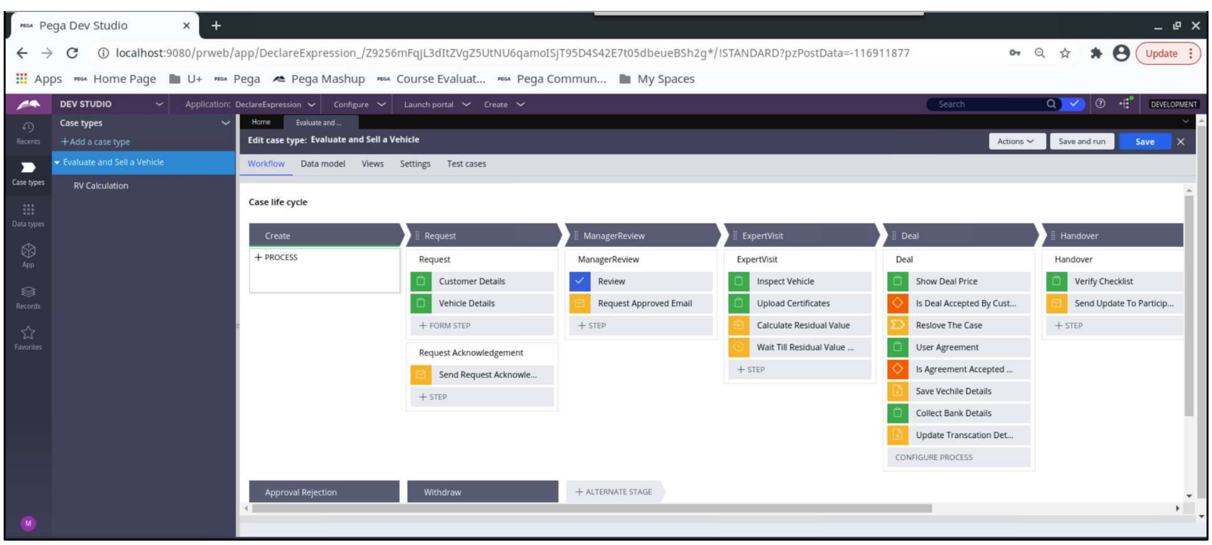


You will see the following:

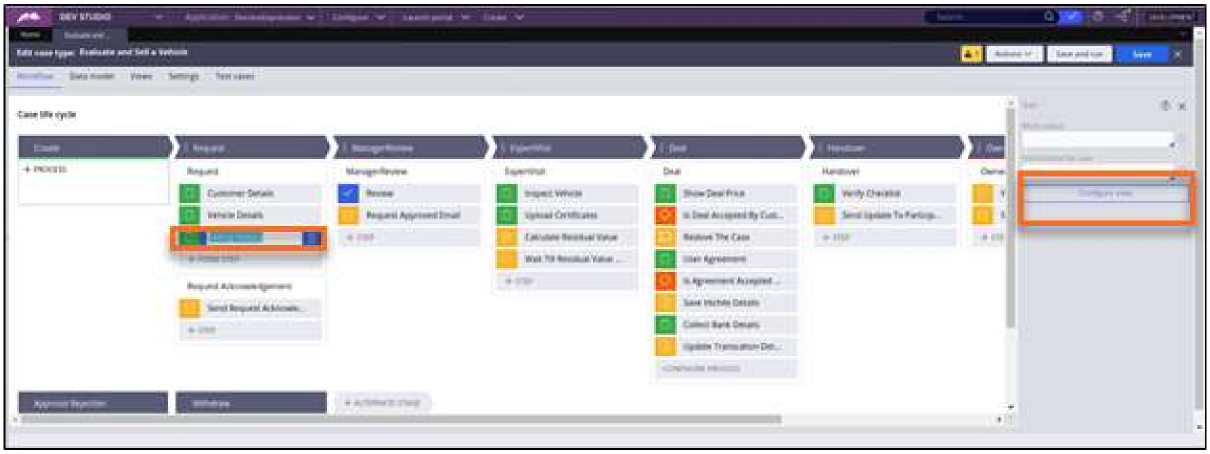


Task 2: Create the Request Status Data Type

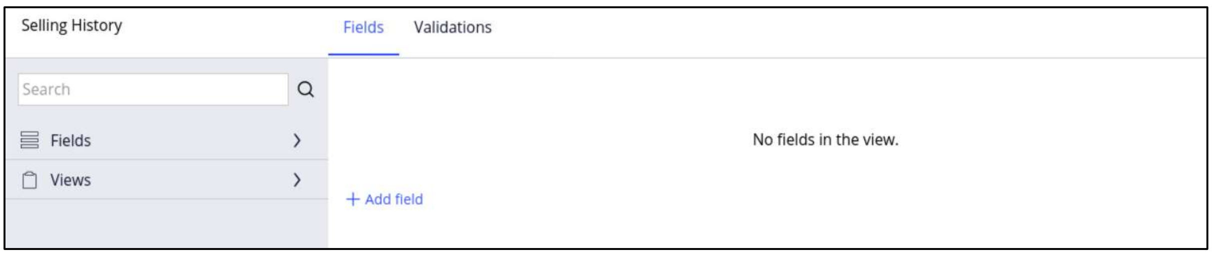
4. From **Case types,** select **Evaluate and Sell a Vehicle**.



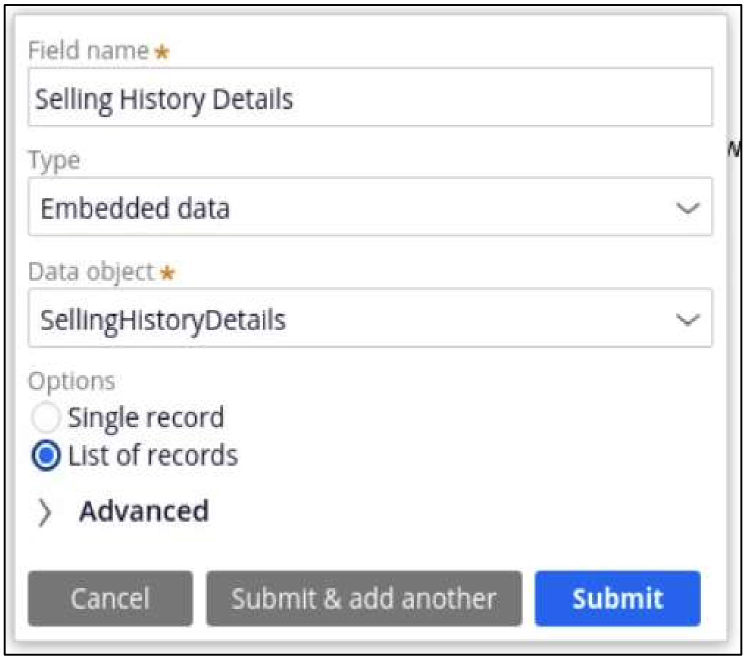
5. From the **Request** process on the first stage, click **+ FORM STEP** and label the new step **Selling History**. Then, click the **Configure View** button on the right-hand panel.



The following appears:

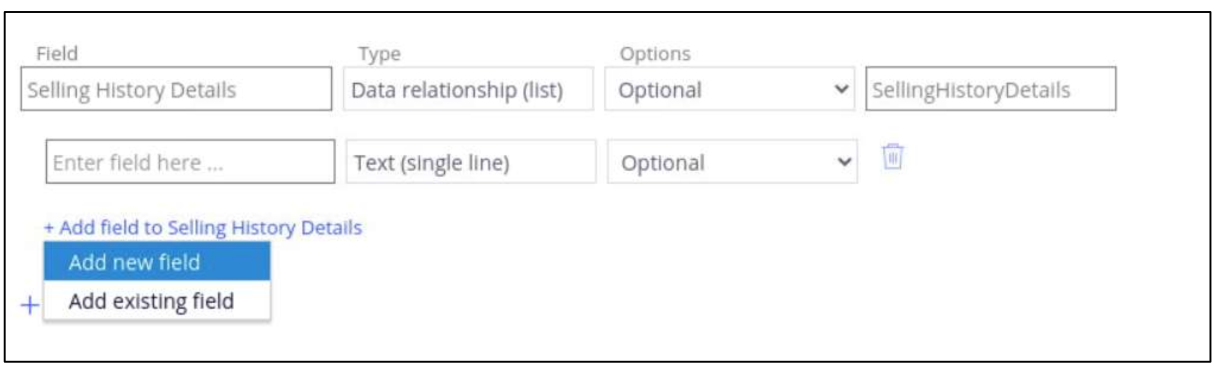


6. Click on the **+Add Field** link.
    a. Enter **Selling History Details** for the **Field name**.
    b. Select **Embedded data** from the **Type** dropdown menu.
    c. Select **Selling History Details** from the **Data object** menu.
    d. Select **List of records** under **Options**.
    e. Click the **Submit** button.

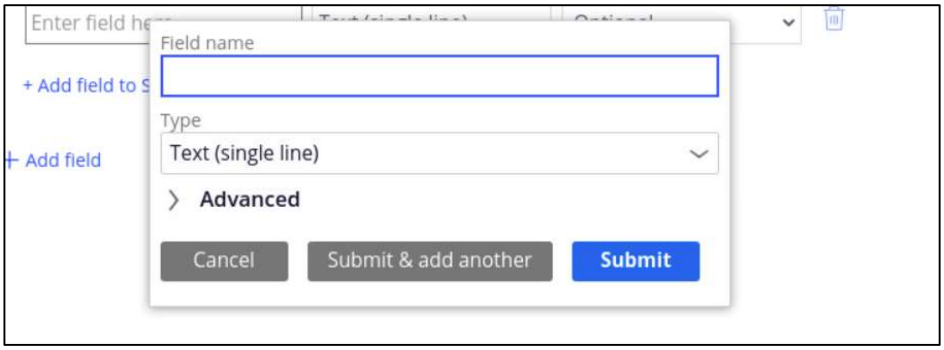


The following screen appears:

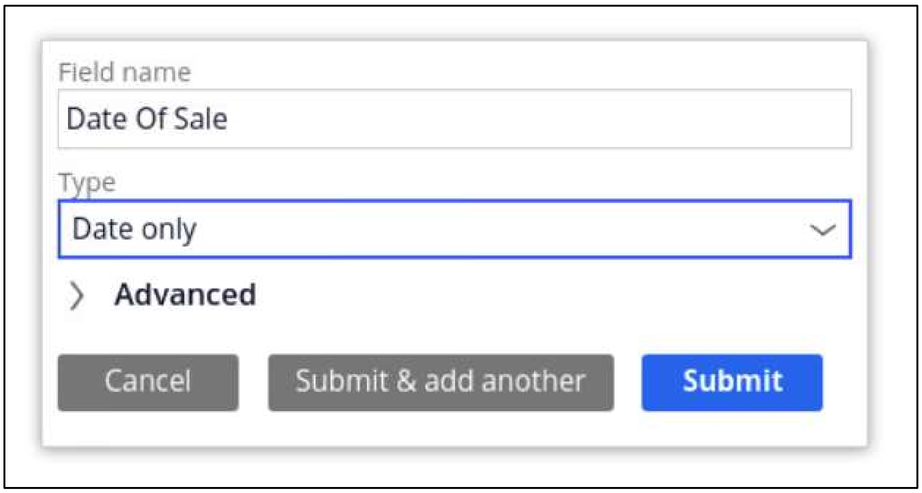
7. Click on the **+Add field to Selling History Details** link, then click on **Add new field**.



The screen below appears:



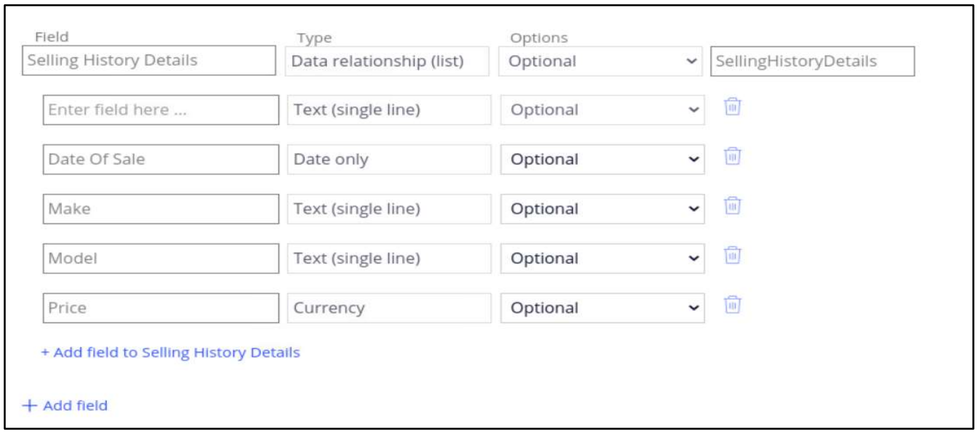
8. In the **Field name** field, enter **Date Of Sale** and select **Date only** from the **Type** dropdown menu, then click on the **Submit & add another** button.



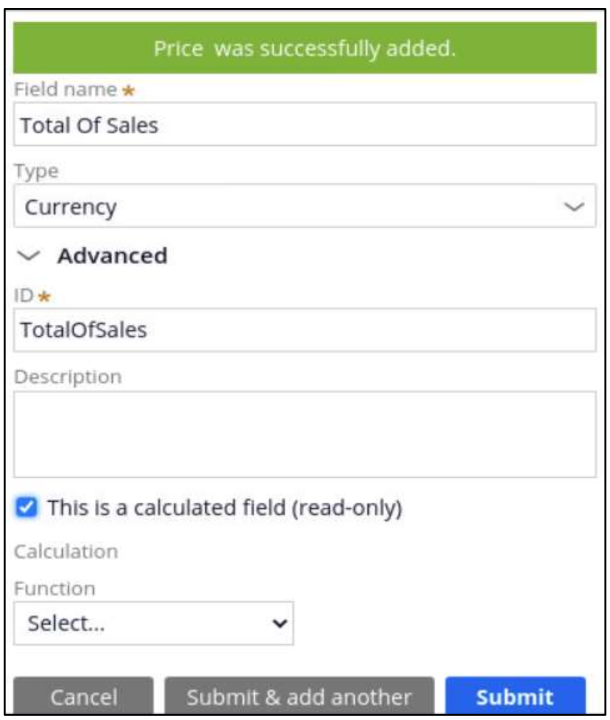
9. Continue doing the same for the rest of the fields, using the following information:

Field Name	Type
Make	Text (single line)
Model	Text (single line)
Price	Currency

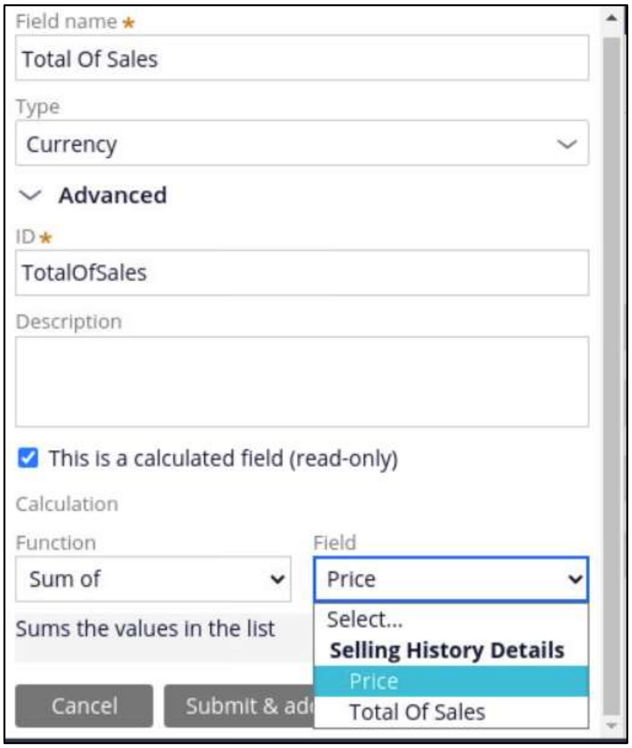
Once all are added, the screen should appear as below:



8. Now click the **+ Add field** link.
    a. Label the new field **Total Of Sales.**
    b. Select **Currency** as the **Type**.
    c. Expand the **Advanced** option by clicking on the chevron next to it.
    d. Then, activate the **This is a calculated field (read-only)** feature by enabling its check box.



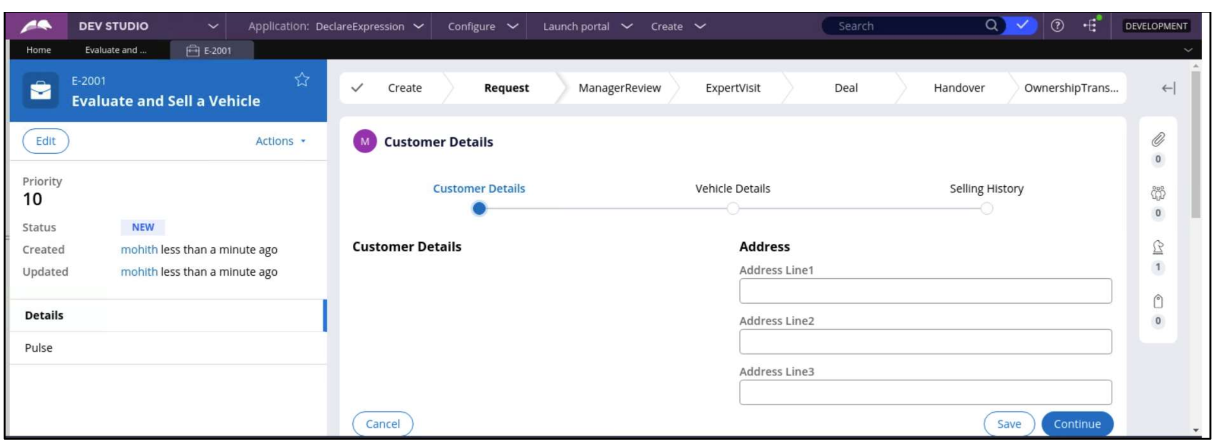
9. Select **Sum of** from the **Calculation Function** dropdown menu and **Price** from the **Field** dropdown menu, then click on the **Submit** button.

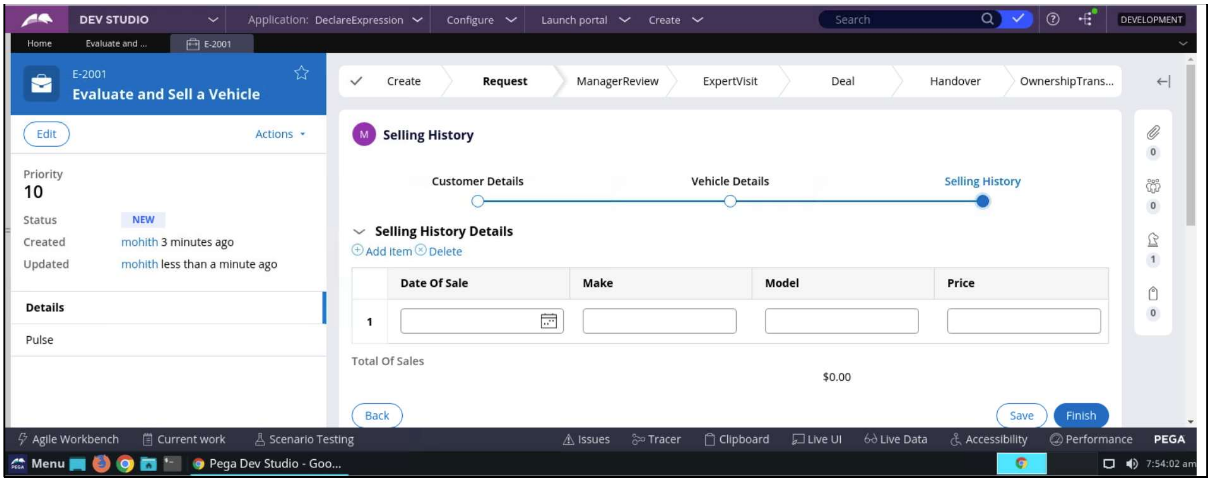


10. Click **Submit** to close the Configure view form**.**

11. Click **Save and run** to start a new case.

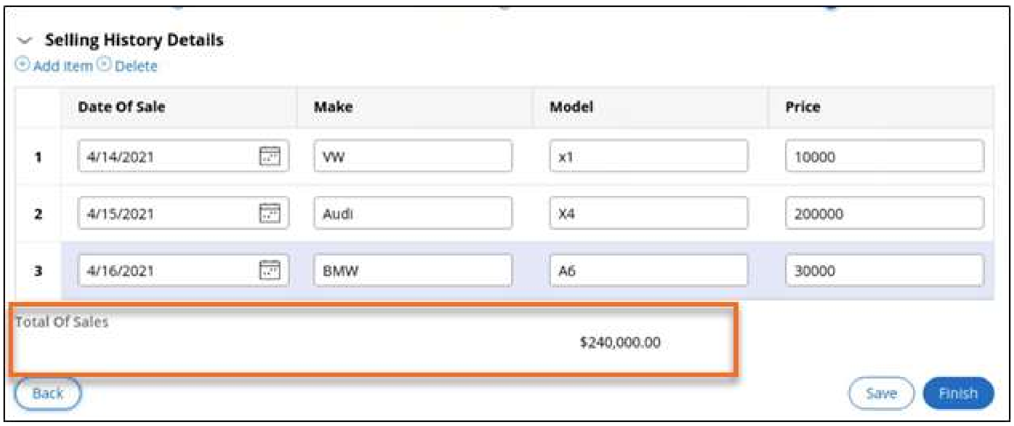
13. Click the **Continue** button to advance to the **Vehicle Details** step, then click the **Continue** button again, to advance to the **Selling History** step.





13. Fill in the **Selling History Details** form.
    a. Enter a **Date of Sale**, **Make**, **Model**, and **Selling price** on the first line.
    b. Click on the **+ Add Item** link to add another row, then enter some values.

Notice the **Total Of Sales** value is updated to reflect the sum of all line item prices.



12. Close all forms.
13. **Log off**.

Create an externally sourced Data type with REST API

Scenario

As part of your application development, you need to access the country information stored on an external system of record into a data type by using REST API.

> **Note: This exercise requires an active connection to the internet.**

Use the following credentials to log in to the exercise system:

Role	Username	Password
Administrator	Admin@ExtDataType	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Create a new application

Login to the exercise system to create a new application in Dev Studio.

Task 2: Create a Country data object and source from an external system of record

Create a data object in App Studio. Source the data from an external system of record using REST API.

Task 3: Update the mapped field for the Country data object

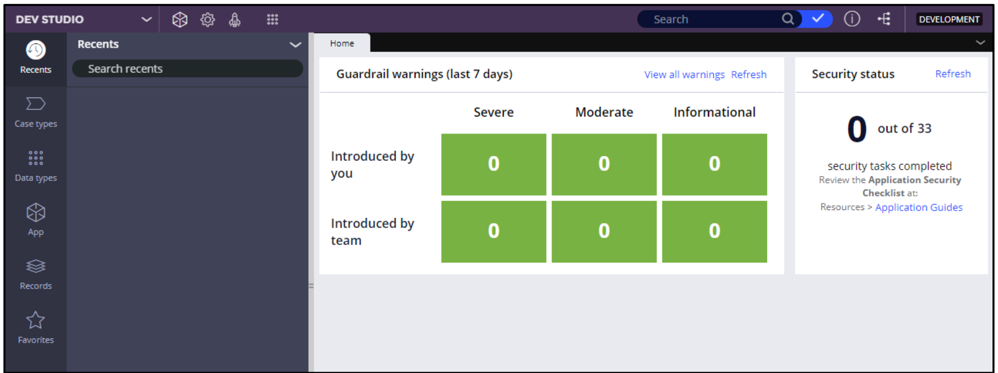
Update the mapped field for the Country data object to add a new field from the external system of record.

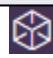
> **NOTE:** Detailed steps to complete your assignment can be found on the pages that follow.

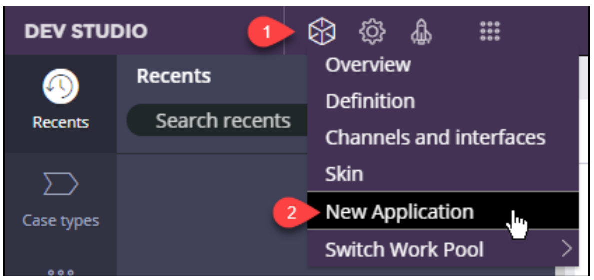
Detailed Steps

Task 1: Create a new application

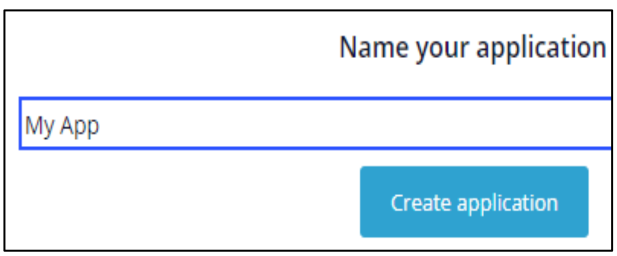
1. Log in and use the credentials **Admin@ExtDataType** and **rules**. The following appears.



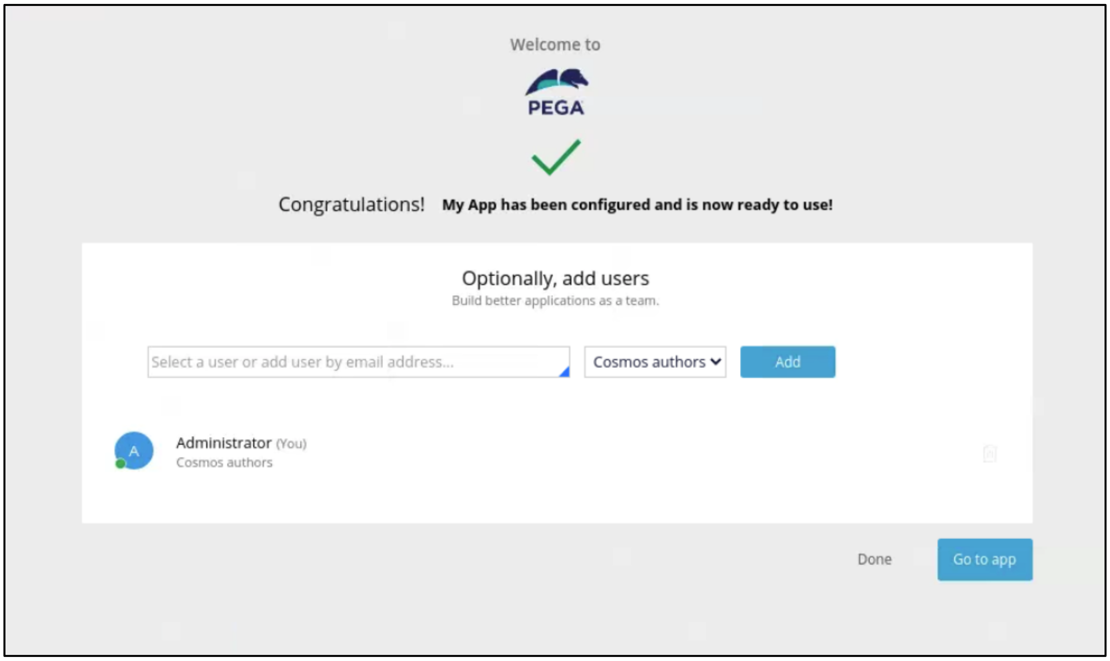
2. Click the **Application**  menu and select **New Application** as shown.



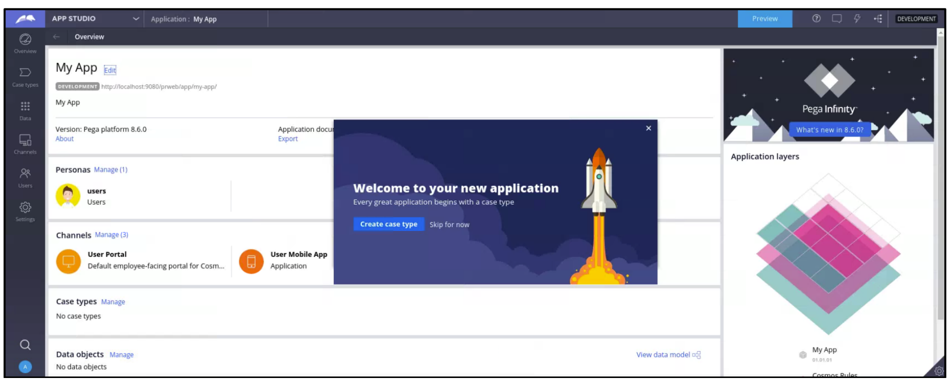
1. Click **Build from scratch** as the type of application to build.
2. Click **Theme Cosmos** as the type of experience for your application
3. Enter **My App** as the name for the application and click the **Create application** button.



4. After the application had been created, click on **Go to app** button.



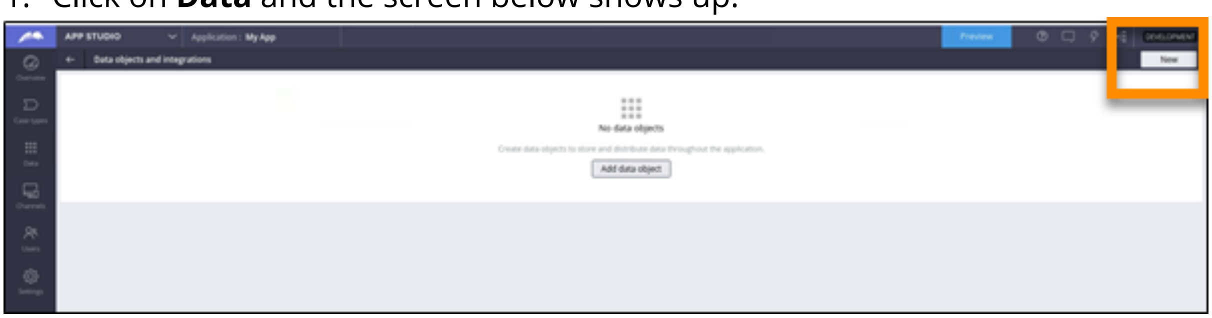
8. You should now be logged into **My App** in App Studio.



9. Click **skip for now** if you receive the Welcome to your new application pop-up.

Task 2: Create a Country data object and source from an external system of record

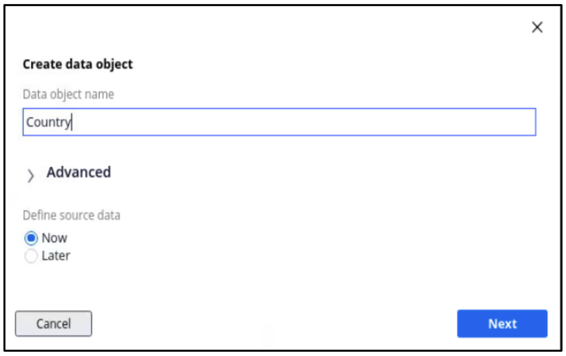
1. Click on **Data** and the screen below shows up.



2. Click the **New** button found in the top-right corner. Configure the **Create new data model** form as shown.

a. Data objects name: **Country**

b. Define source data: **Now**



c. Click **Next**. Configure the rest of the form as shown below

d. System: **Create new**

e. Name: **Country SOR**

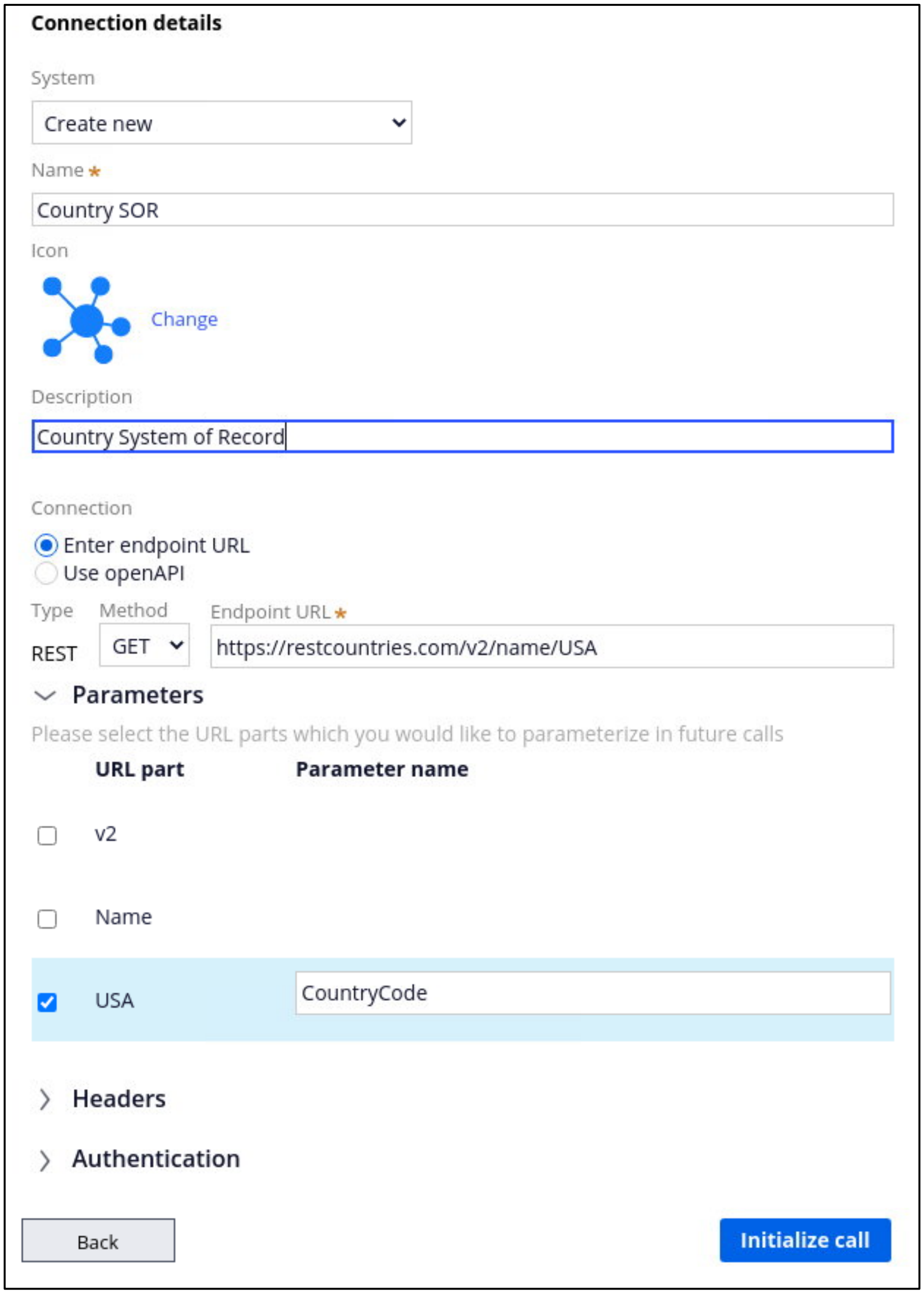
f. Description: **Country System of Record**

g. Method: **GET**

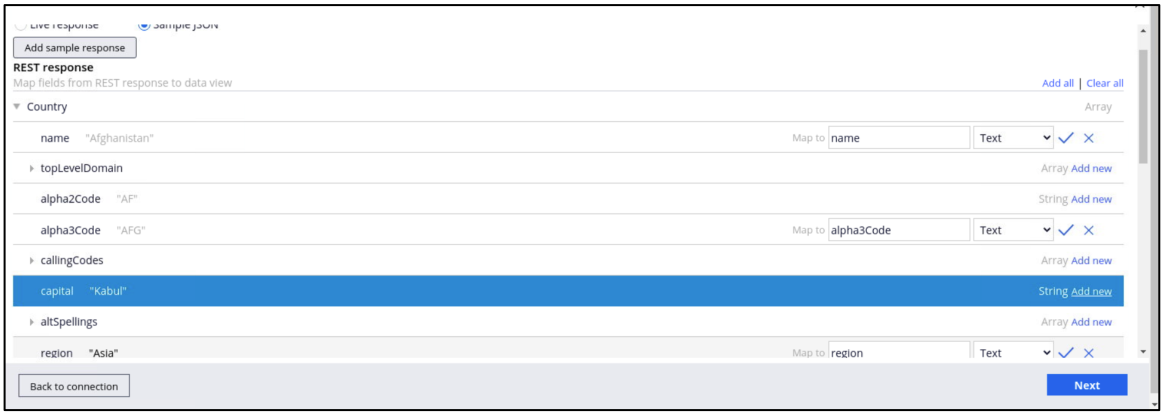
h. Endpoint URL: **https://restcountries.com/v2/name/USA**

i. URL part: ☑ **USA**

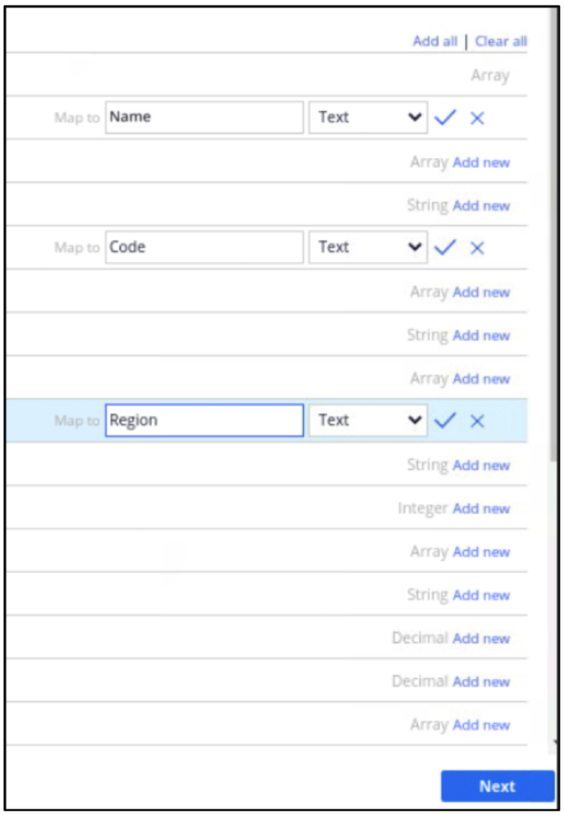
j. Parameter name: **CountryCode**



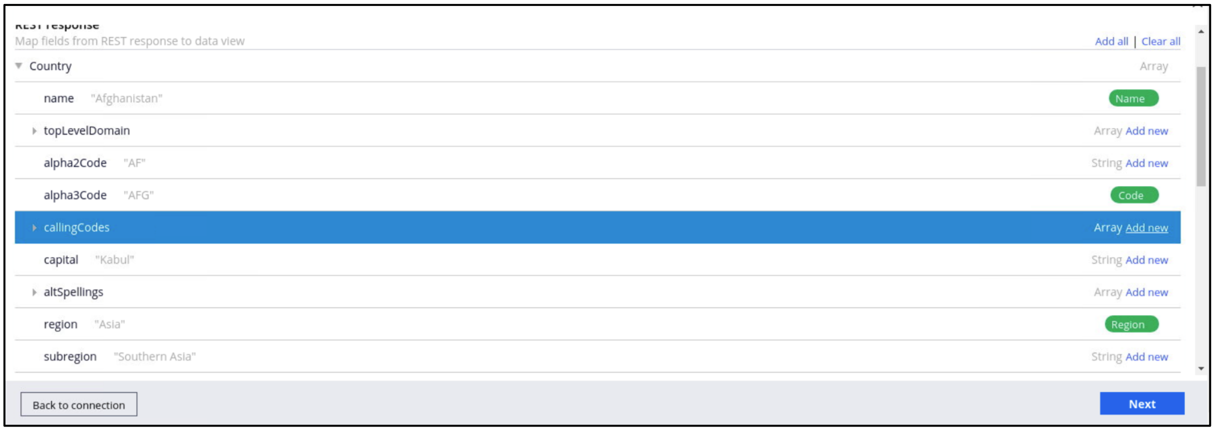
3. Click the **Initialize call** button to view the REST response screen
4. Click the Add new link by the fields:
   - **a.** name
   - **b.** alpha3Code
   - **c.** region



5. Rename the Map to fields as **Name**, **Code**, and **Region** as given below and click on the checkmark ✓ to save your changes.



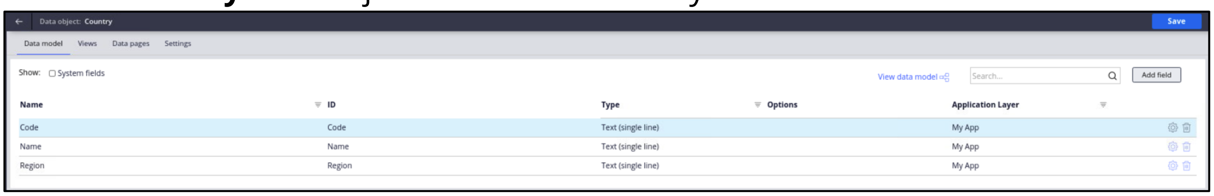
CAUTION: Make sure you click on the checkmark ✓ to save the changes for each mapped field, before you click on the **Next** button.



6. Click on the **Next** button.

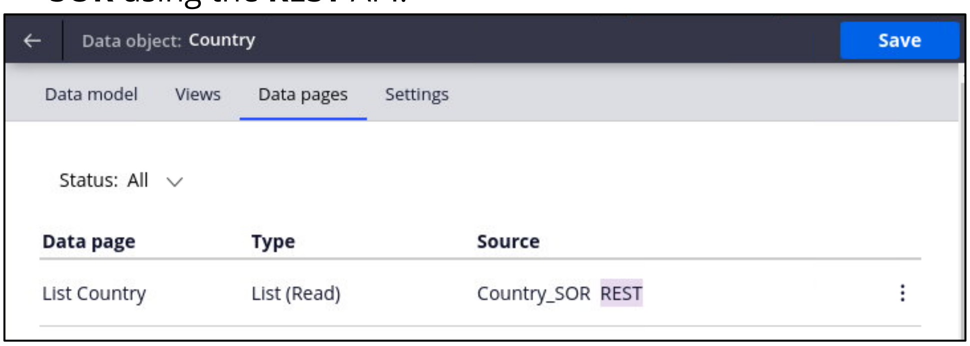
7. In the **Environment settings** form, do not modify anything. Click on the **Submit** button.

   The **Country** data object is now successfully created.



8. Click on the **Data pages** tab.

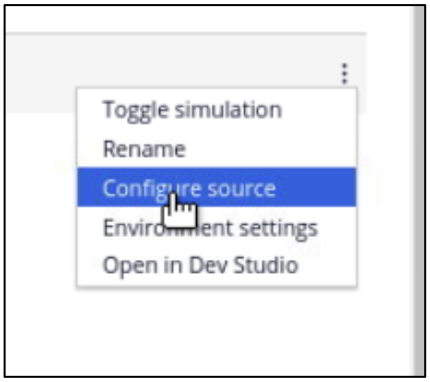
9. Verify that the **List Country** data page is created and sourced from the **Country SOR** using the **REST** API.



Task 3: Update the mapped field for the Country data object

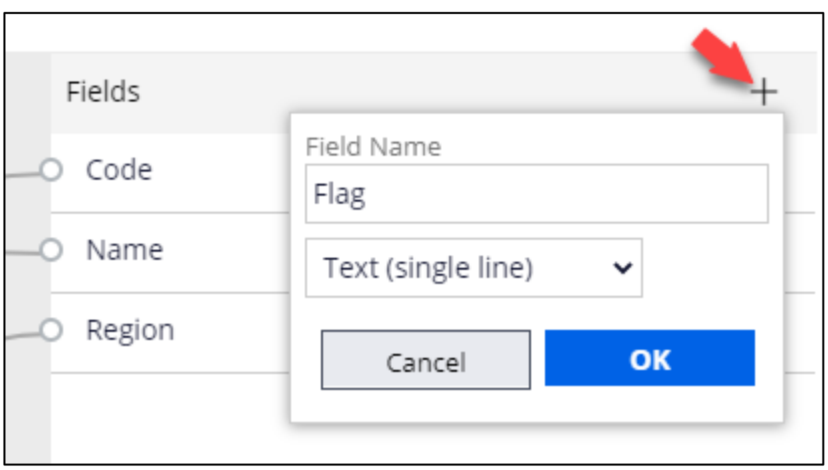
1. Click on the three vertical dots to open the **Actions** menu for the **List Country** data view.

2. Click on **Configure source**.



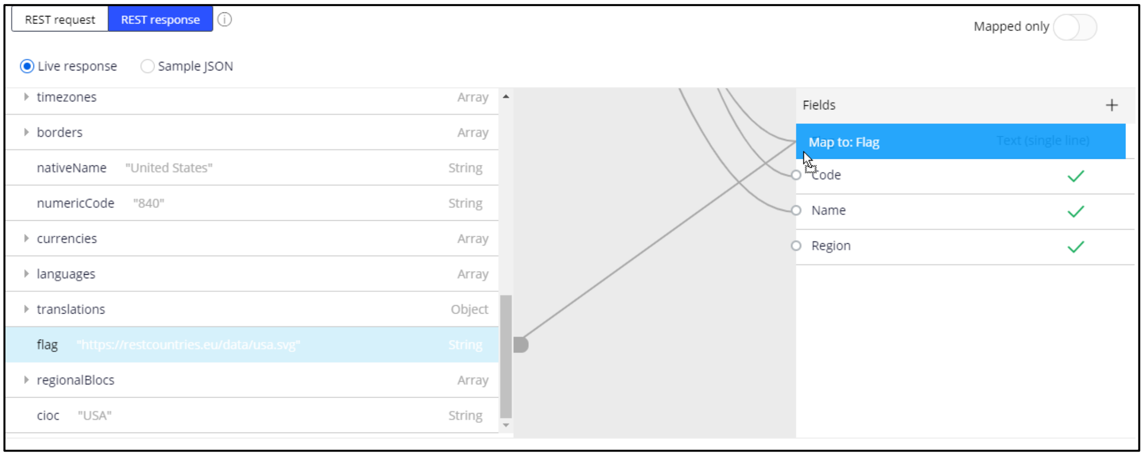
3. There is no need to change any settings here. Click the **Initialize call** button to view the Data mapping form.
4. The below screen appears:

5. Click the **+** icon on the right-hand side of screen to add a new field.
   a. Name it Flag**.**
   b. Select **Text** from the dropdown menu.
   c. Click the **OK** button to confirm.

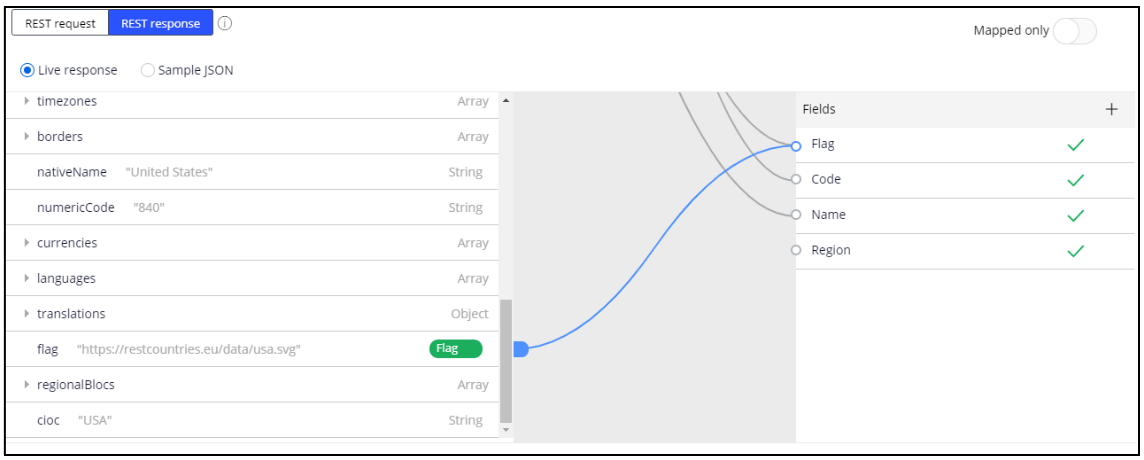


6. In the REST response column, scroll to the bottom and locate the **flag** field.

7. Click on the **flag** field in the left column and drag it to the **Flag** field in the right column, then release the mouse.

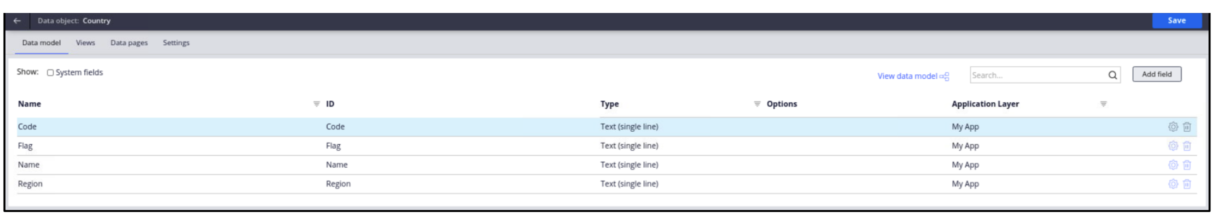


8. Verify that the field is mapped correctly.



9. Click **Next**, then click **Submit**.

10. Click on the Data model tab and verify that the new **Flag** property had been created successfully. If the new Flag is not visible, please log off and log in back to see the refresh data model fields.



11. Optional: Switch to Dev Studio and test the data page with the same procedure you used in task 3 of the data pages lab.

12. **Log off**.

Decision, Approval and Routing

Routing

Scenario

The Auto Application Case Life Cycle Evaluate and Sell A Vehicle has been defined; however, no routing exists. The Inspect Vehicle assignment must be routed to the Investigators work queue. The User Agreement Assignment has to be reviewed by the role of Owner. The Review step should go to the Auto:Managers work queue for review and approval or rejection.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	Joe_Author@Routing	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login in and enable branch development
Enable branch development to allow modification of cases.

Task 2: Add routing to Inspect Vehicle step
Add Work Queue routing to Inspect Vehicle.

Task 3: Modify routing on User Agreement step
Add Worklist routing to User Agreement

Task 4: Routing Review
Add Work Queue routing to Review

Task 5: Verify your work
Run the case and confirm the three shapes are routed appropriately.

Task 6: Launch User portal
Run a case and view it in the Investigators work queue.

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

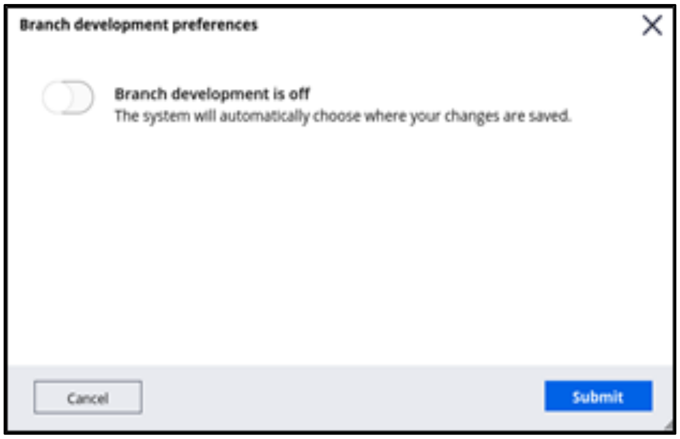
Detailed Steps

Task 1: Login and enable branch development

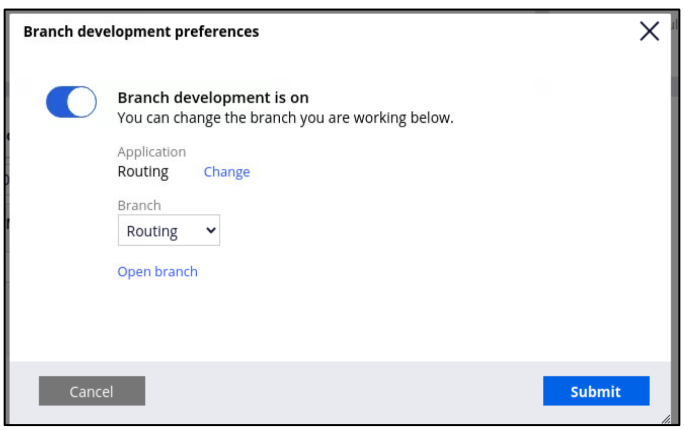
1. Log into Pega using the username **Joe_Author@Routing** and the password of **rules**.

2. From the title bar, click the **Toggle branch development** button.

3. The following appears.

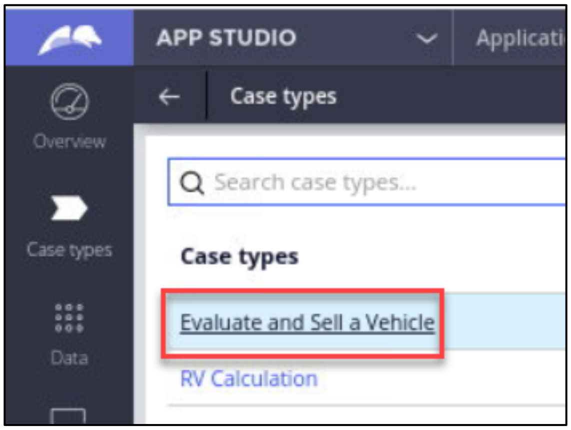


4. Move the slider to turn **Branch development** on. From the **Branch** dropdown, ensure that **Routing** is selected and click **Submit**.

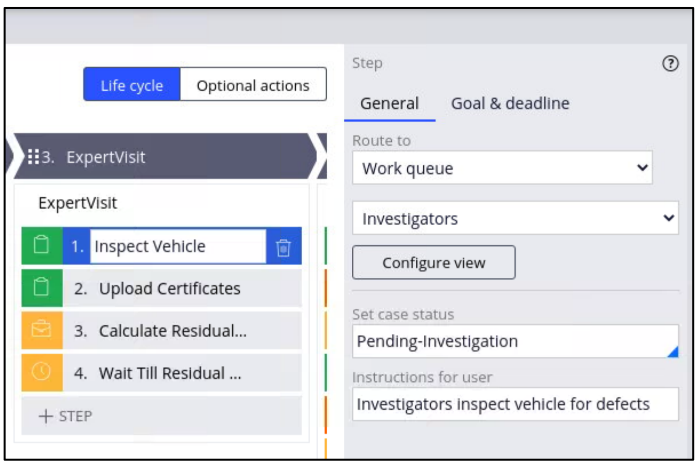


Task 2: Add routing to Inspect Vehicle step

1. Click **Case Type→Evaluate and Sell a Vehicle.**



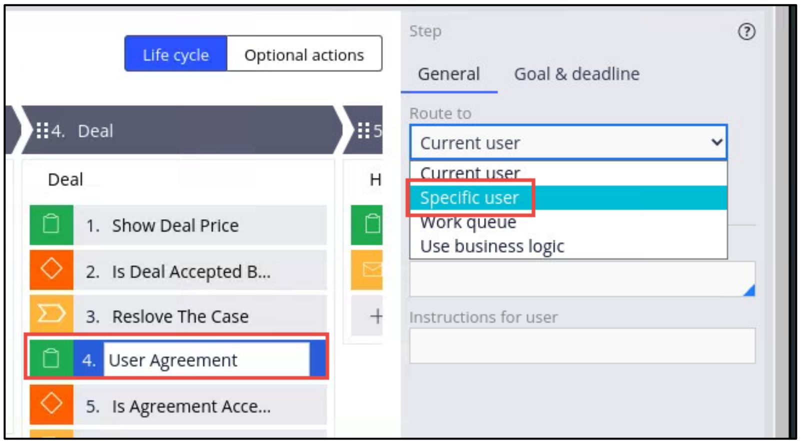
2. For the **ExpertVisit** stage, click on the green step **Inspect Vehicle**. This will open the contextual properties panel for the shape.
    a. Route to **Work queue** > **Investigators**
    b. Set case status to **Pending-Investigation**
    c. Set Instructions for the user to **"Investigators inspect vehicle for defects."**



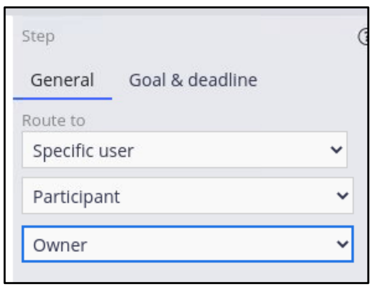
3. Click **Save.**

Task 3: Modify routing on the User Agreement step

1. Click on the Collect Information shape named **User Agreement** in the Deal stage. This will open the contextual properties panel for the shape. Click on the drop-down arrow of the **Route to** Selection field. Select **Specific User**.



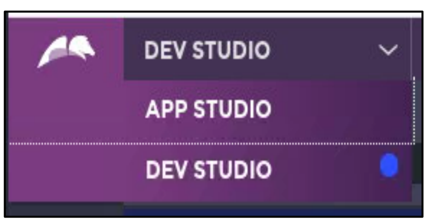
2. Select **Participant** from the drop-down field that appears below. Choose **Owner** from the field that appears below.



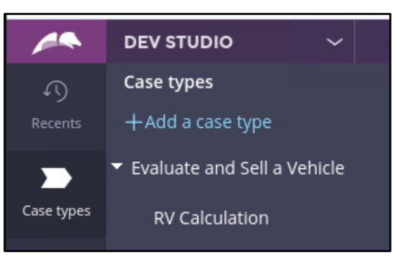
3. Click **Save**.

Task 4: Routing Review

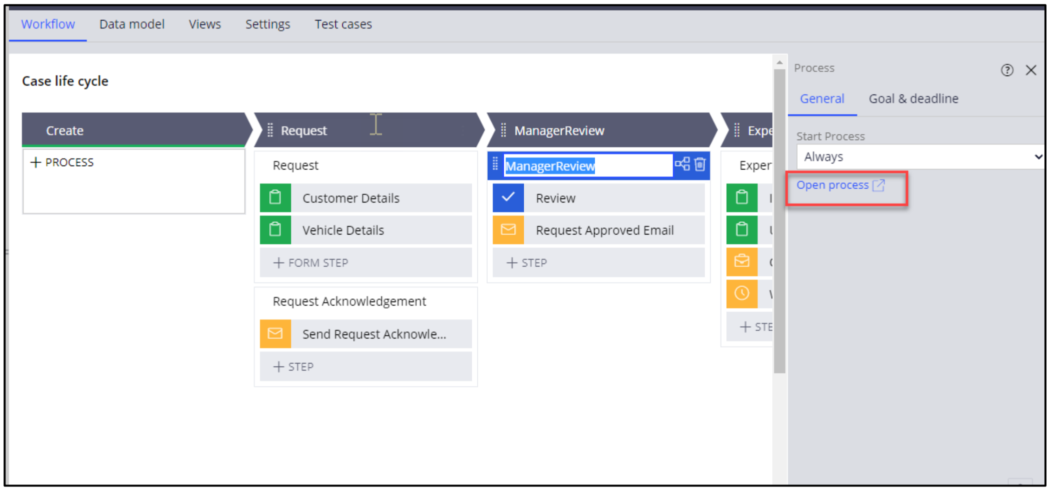
1. Switch to **Dev Studio.**



2. Open the **Evaluate and Sell Vehicle** Case Type.



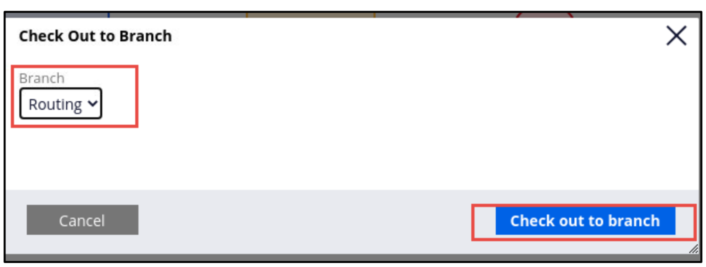
3. Select the ManagerReview Process and click on the Open process link.



IMPORTANT: You will modify the Review flow shape to have access to all the available work queues in the system. Currently, Joe only has access to the work queues associated with his team or workgroup. For design, we want to select the Auto:Managers work queue.

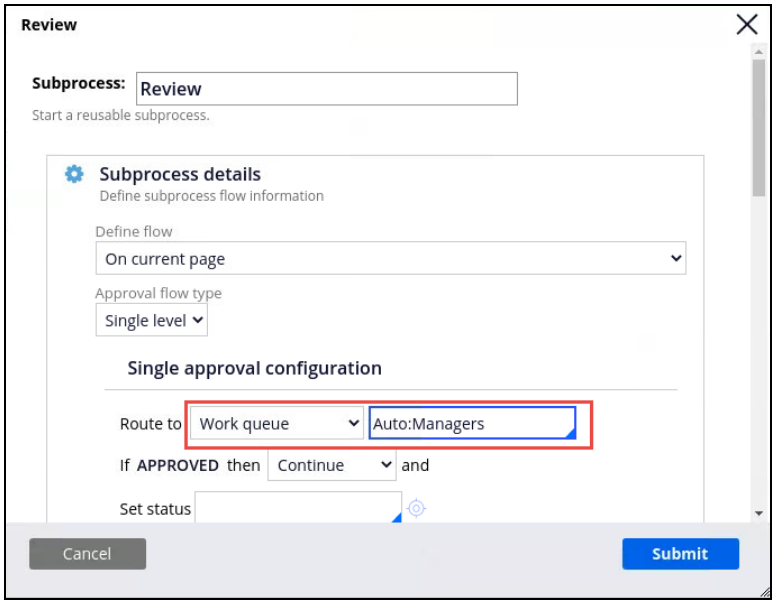
4. Click **Check out to Branch**.

5. Choose the **Routing** branch. Click **Check out to Branch**.

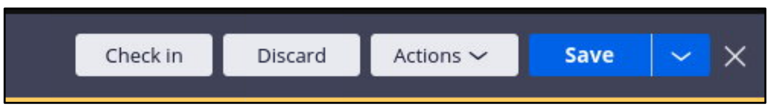


6. **Double click** on the **Review** subprocess shape to access the properties panel.

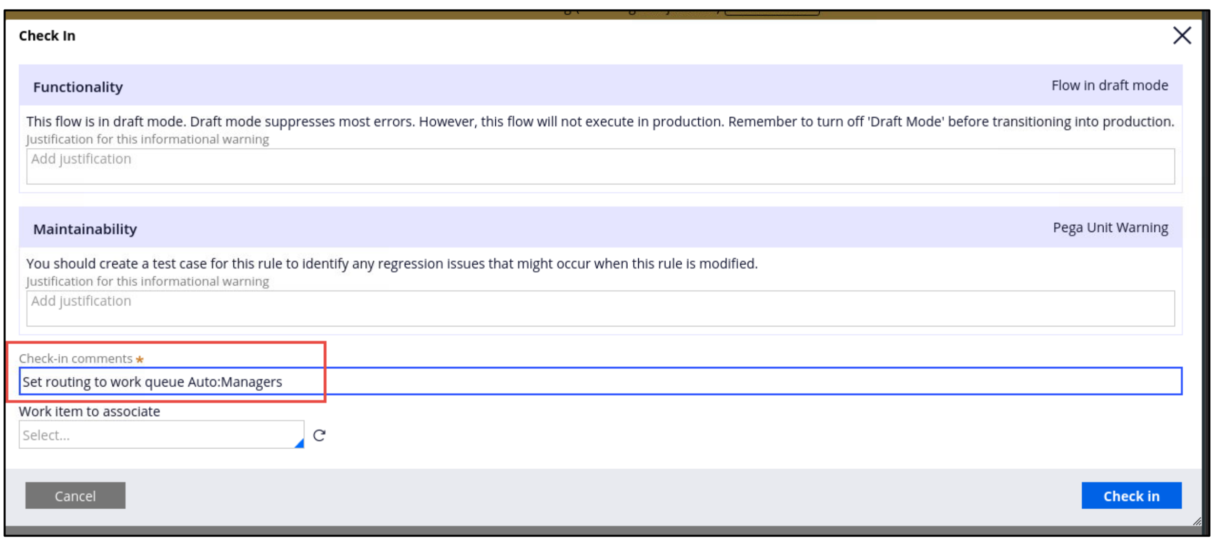
7. In the **Review** properties panel, set the **Route to Work queue** And **Auto:Managers**.



8. Click **Submit** and **Save.**



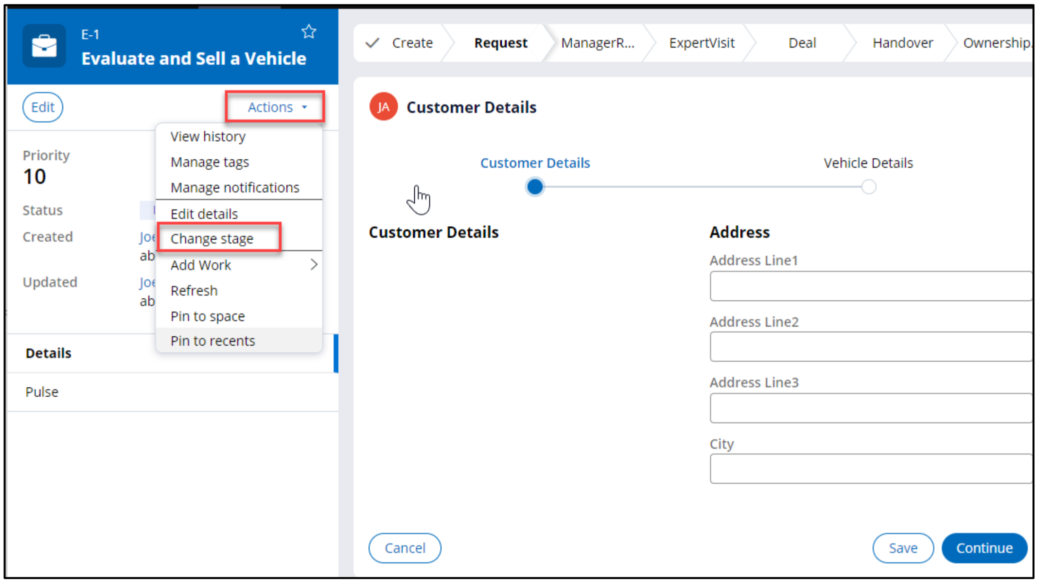
9. **Check in.** Enter a check in comment and click **Check in.**



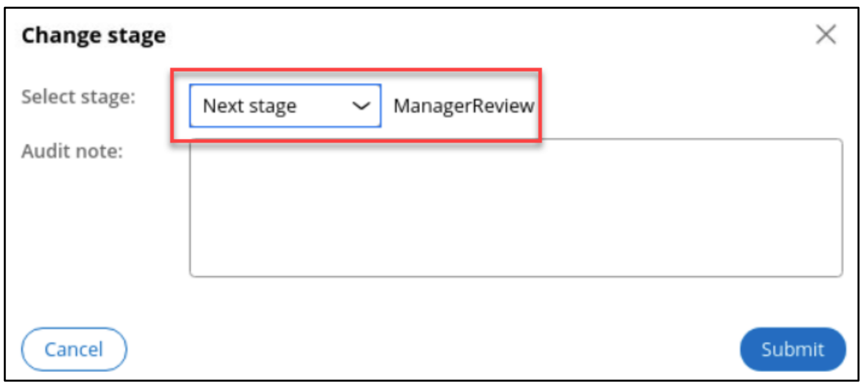
10. Close the flow rule tab by clicking **X**.

Task 5: Verify your work

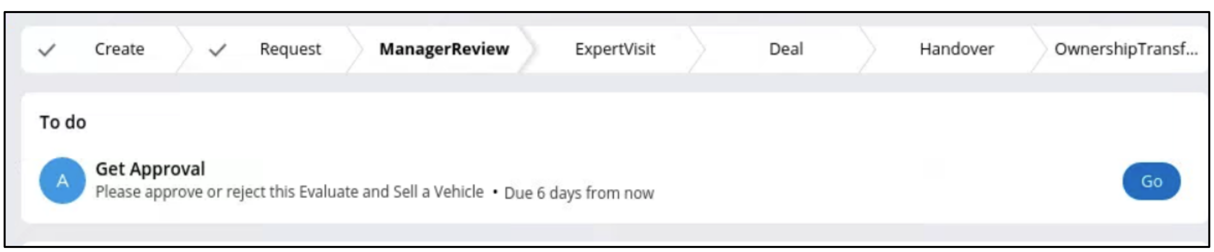
1. On the **Case type,** click **Save and Run.**
2. Click **Action** > **Change Stage**.



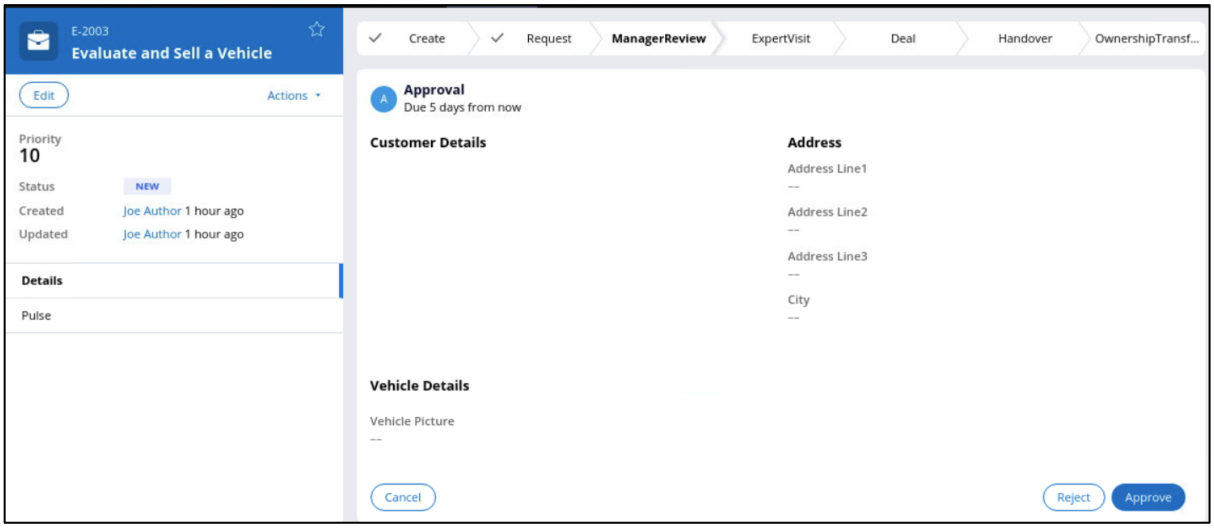
3. Select **Next Stage > Manager Review** and click **Submit.**



4. Click the **Go** button.

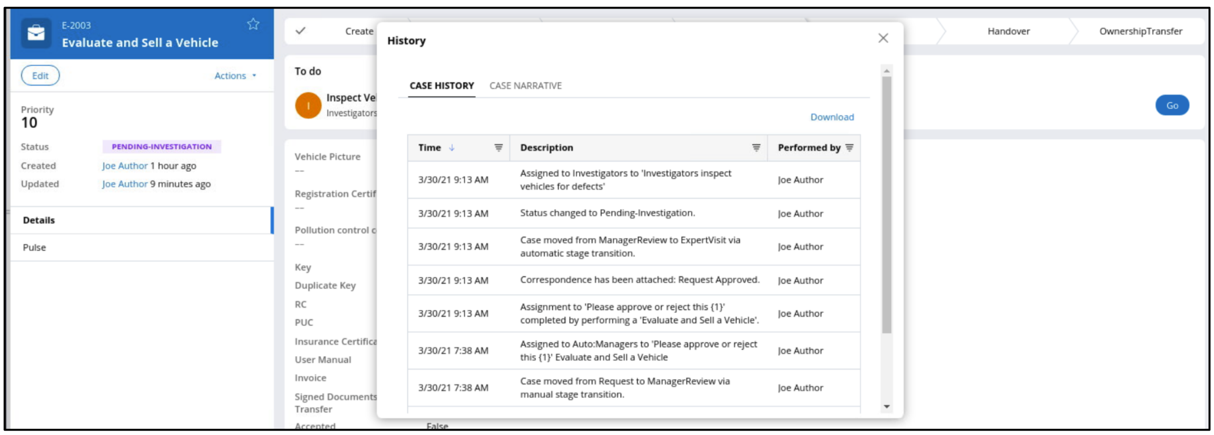


5. On the Manager Review stage, select **Approve** on the Approval screen.

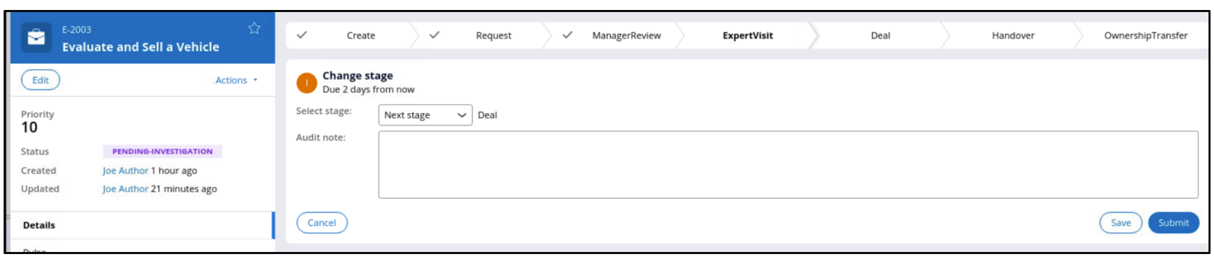


6. Click **Approve** to continue.

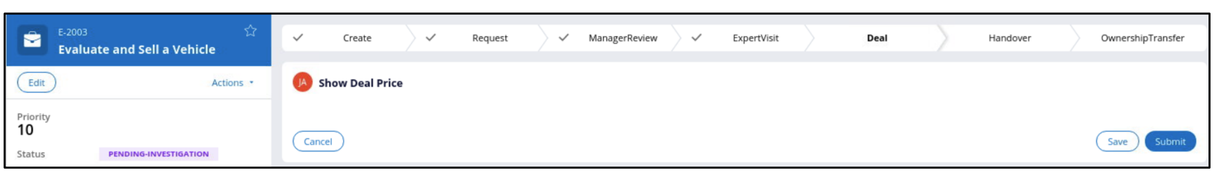
7. On the following screen, confirm you see the status has been updated to **Pending-Investigation,** and the task has been assigned to **Investigators** with the Instructions you entered. Click on Actions->View History to see the case history details.



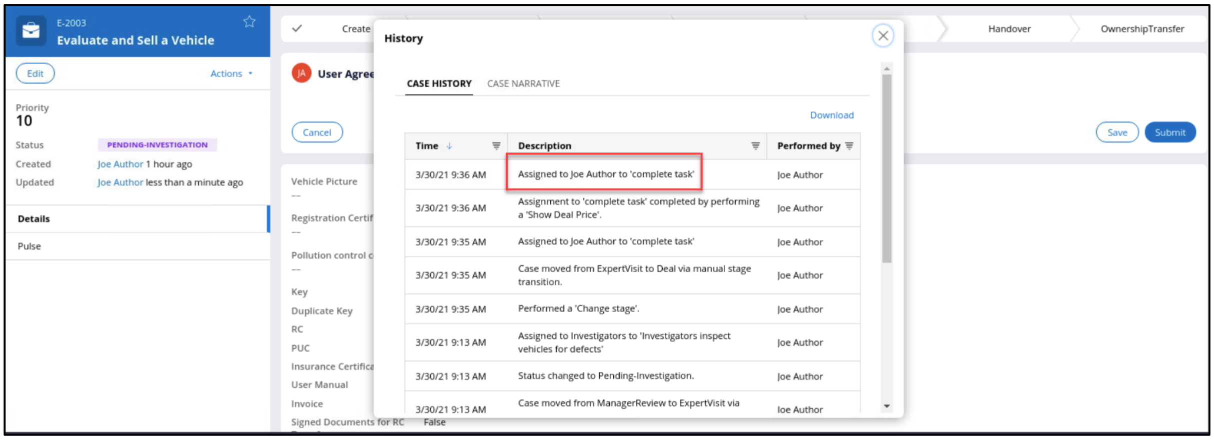
8. **Actions > Change stage** to the **Next Stage > Deal**. Click on **Submit**.



9. See the empty form **Show Deal Price.** Click **Submit.**



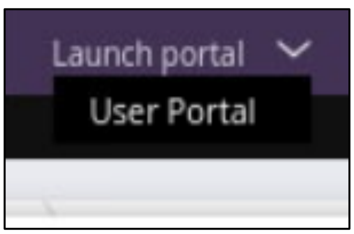
10. In the following form, click on **Actions > View History** and verify the User Assignment is Joe Author. And that the Open Assignments also shows Joe Author.



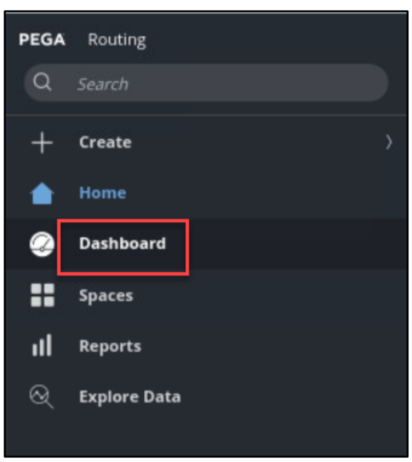
11. Because the case owner is also the same person who created the case, the case was routed to Joe Author.

Task 6: Launch User portal

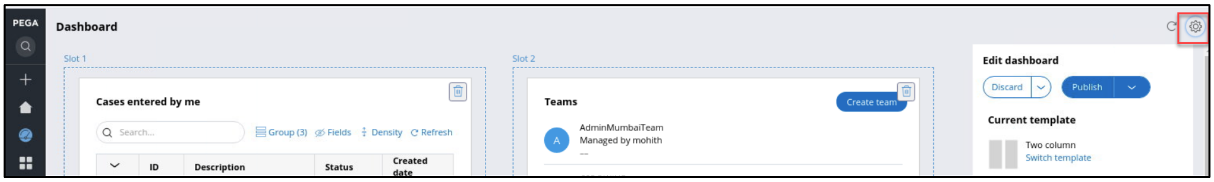
1. From Dev Studio, launch the **User portal**.



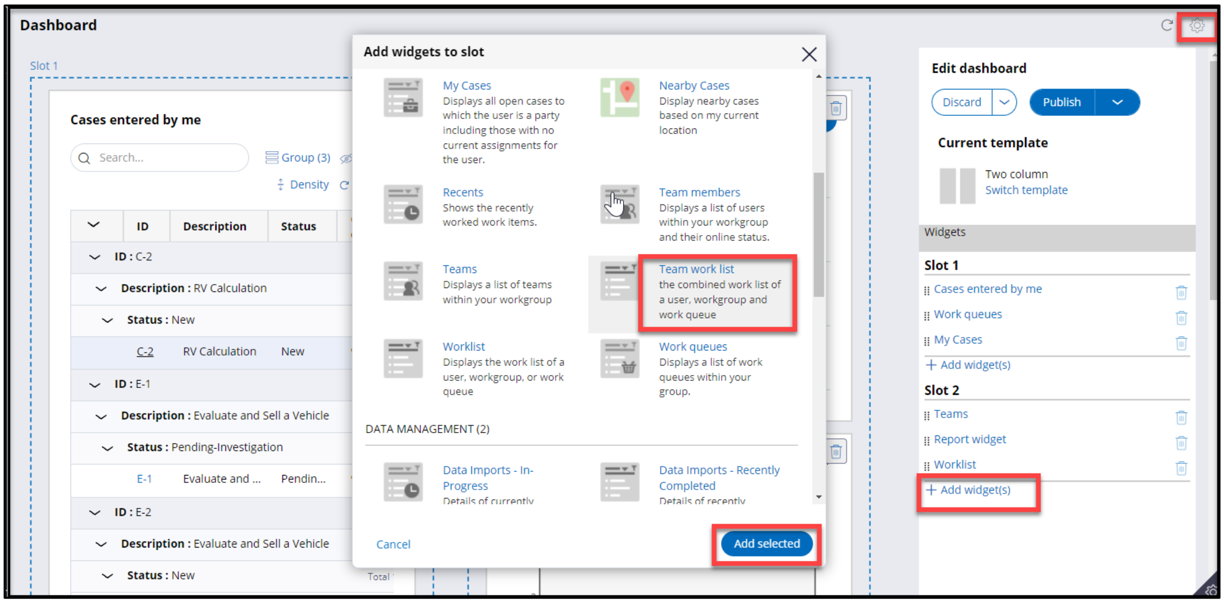
2. Click on **Dashboard**.



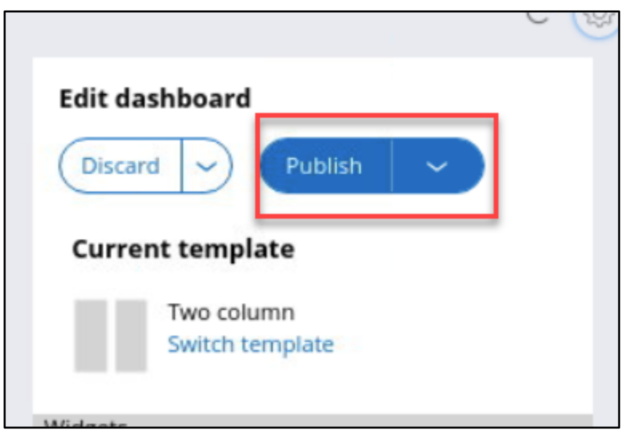
3. On the Dashboard, click on **personalize dashboard** icon.



4. Click on **Add widget**, select the **Team work list** widget in the required slot and click **Add selected** button.



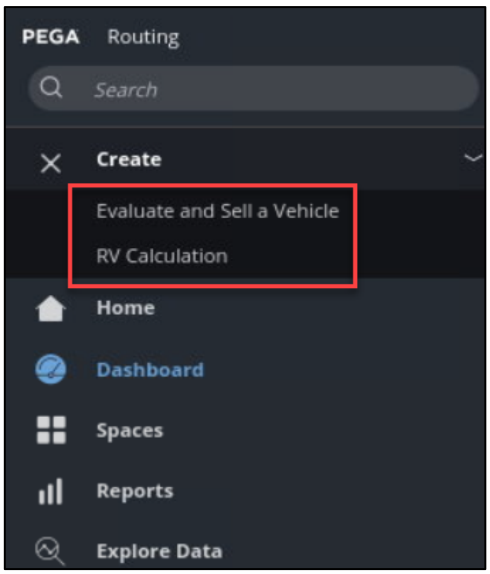
5. Click the **Publish** button to save the changes.



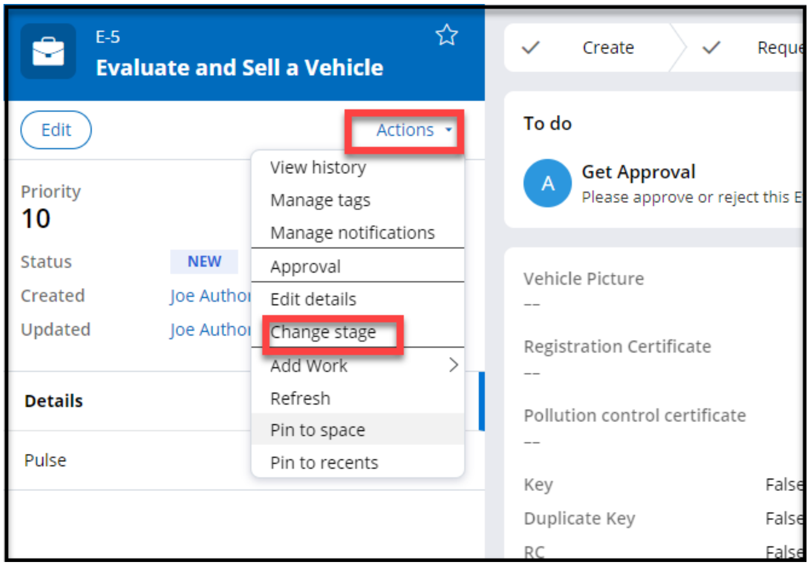
6. Scroll down to see the Team work list widget added. Click on **My worklist**. A list of team members and work queues are displayed. In the search box, type or key-in investigators and select the **investigators** work queue to see the cases in the selected work queue.

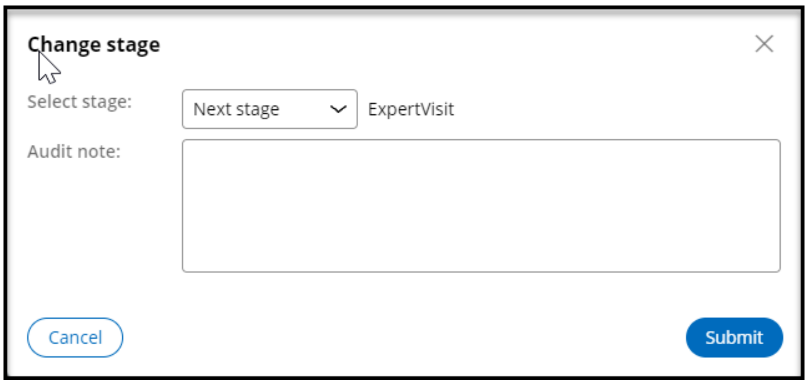
NOTE: The number of cases you see in the queue depends on how many cases you have created and are sitting in that work queue. Each student's environment will likely be different than the image presented here.

7. Click the **+** next to **Create** and select **Evaluate and Sell a Vehicle.**

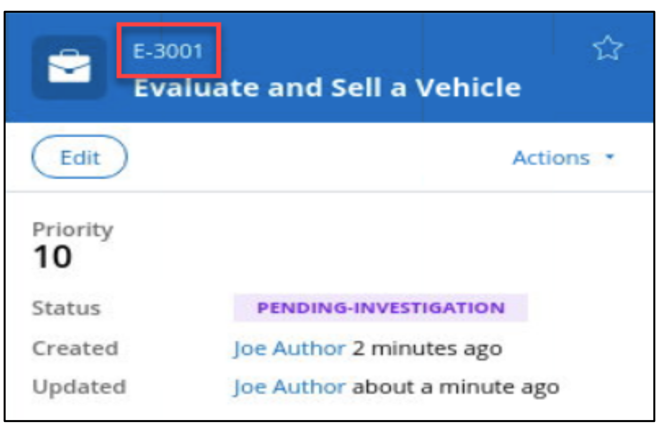


8. Click **Continue**.
9. Click **Finish**.
10. Click **Actions** > **Change Stage** > **Next Stage - Expert Visit** > **Submit.**



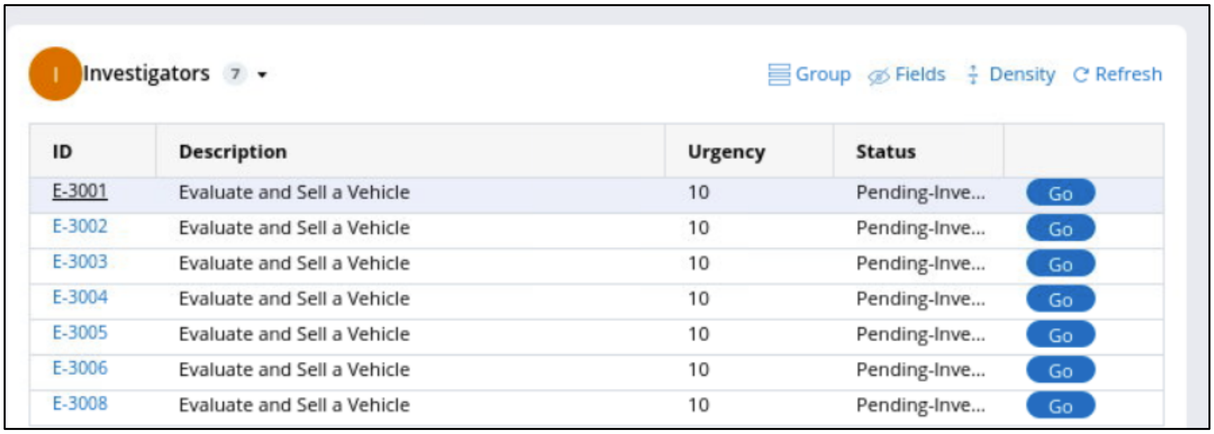


11. Note the current **Case ID**. Confirm the case is at **Inspect Vehicle.**



12. Click on **Dashboard.**

13. Scroll down to the Team worklist and select the **Investigators** Work queue. Confirm the case that you just created is in the Investigators queue.


I
Investigators
7
Group
Fields
Density
Refresh
ID
Description
Urgency
Status
E-3001 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3002 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3003 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3004 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3005 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3006 Evaluate and Sell a Vehicle 10 Pending-Inve... Go
E-3008 Evaluate and Sell a Vehicle 10 Pending-Inve... Go

14. **Log off**.

Single Approvals

Scenario

Hiring Manager Approval

As a hiring manager, I need to review the applicant's resume for qualifications and verify their work history.

Acceptance Criteria:

- Before a background check is done, or compensation is determined, approval is routed to the hiring manager.
- The hiring manager can review the Applicant's information and previous employment (Using the existing *Applicant Overview* user view).
- The hiring manager can choose to approve or reject the applicant.
- The hiring manager can write feedback about the applicant.
- If rejected, the case's status is set to *Resolved-Rejected*.

Use the following credentials to log in to the exercise system:

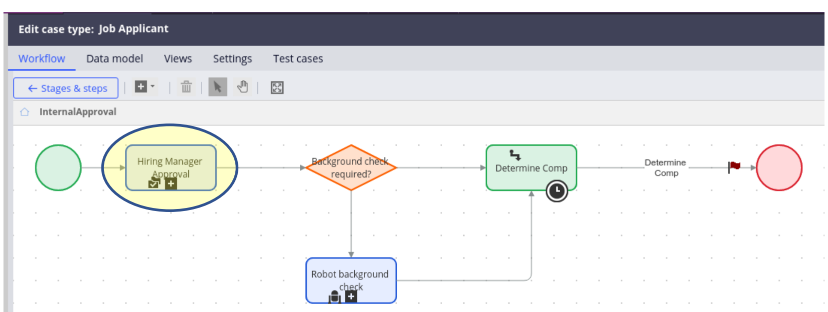
Role	Username	Password
Admin	Admin@approvals	rules

Your Assignment

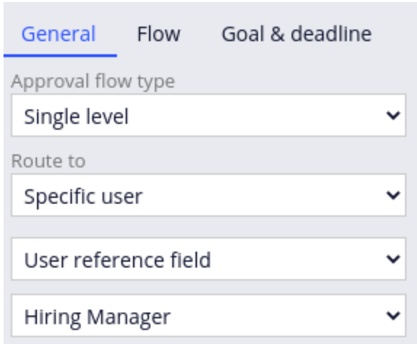
Your assignment consists of the following tasks:

Task 1: Add an Approval step to the Internal Approval process

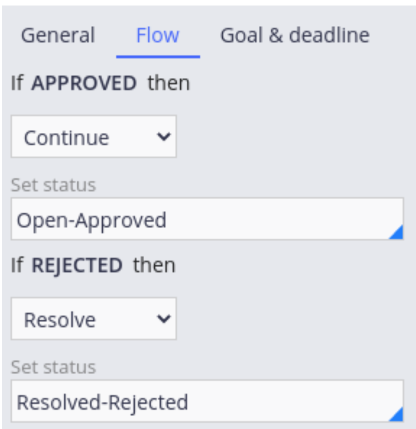
The approval should be added as the first step in the *Internal Approval* process.



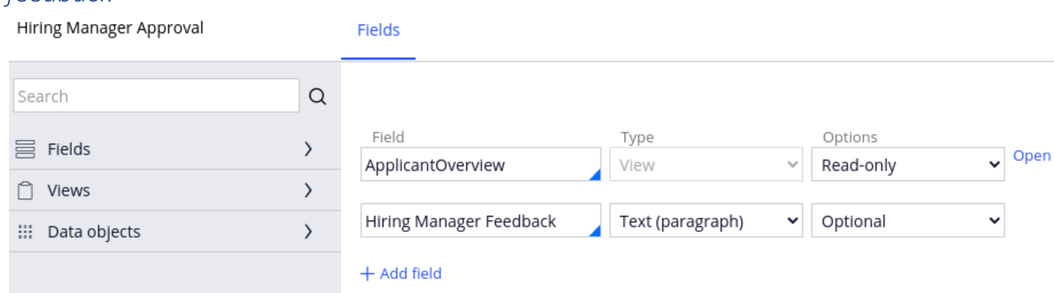
Task 2: Configure the single level approval to be routed to the Hiring Manager



Task 3: Configure the approval flow to resolve case as Resolved-Rejected if rejected by the hiring manager



Task 4: Configure a user view for the approval step to display the existing Applicant Overview user view as read-only and add a Hiring Manager Feedback field (field does not currently exist) to the view for manager feedback



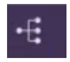
Task 5: Test results against Acceptance criteria (see Scenario)

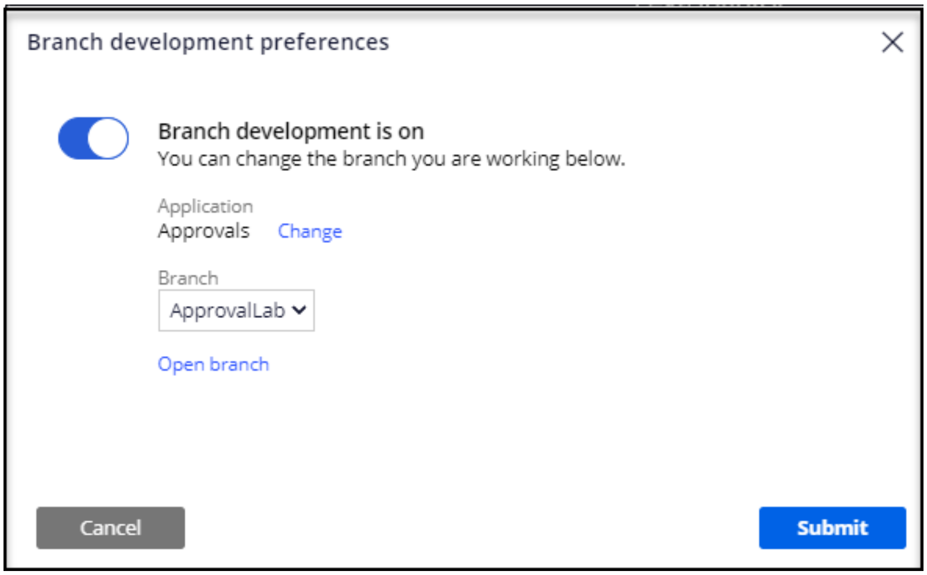
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

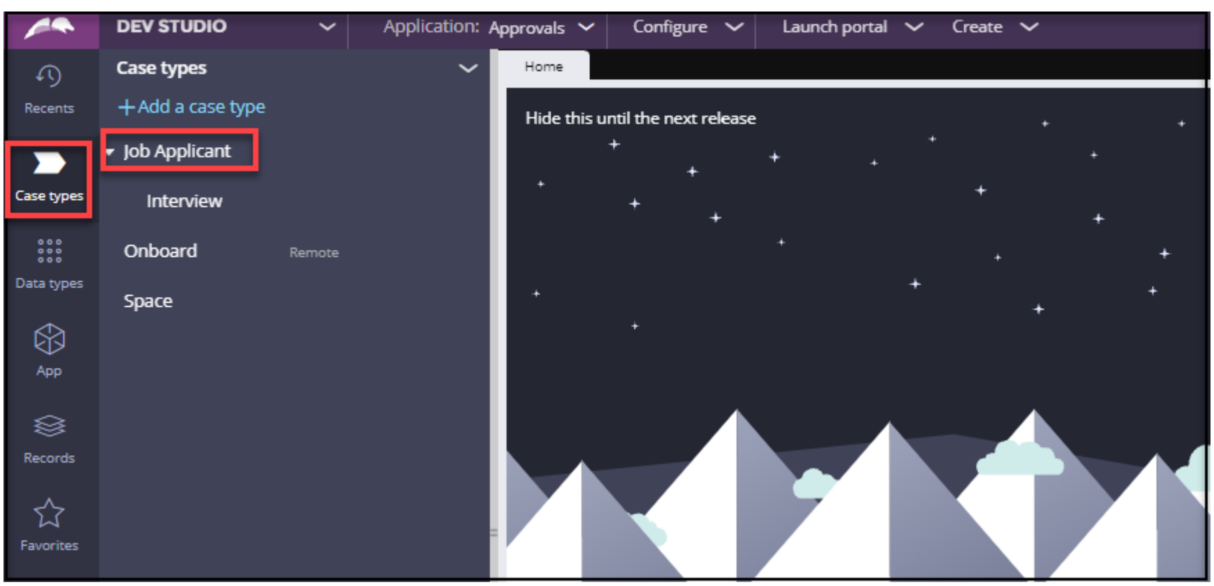
Task 1: Add Approval step to the Internal Approval process

1. Log in using the following credentials: **Admin@approvals** and **rules**.

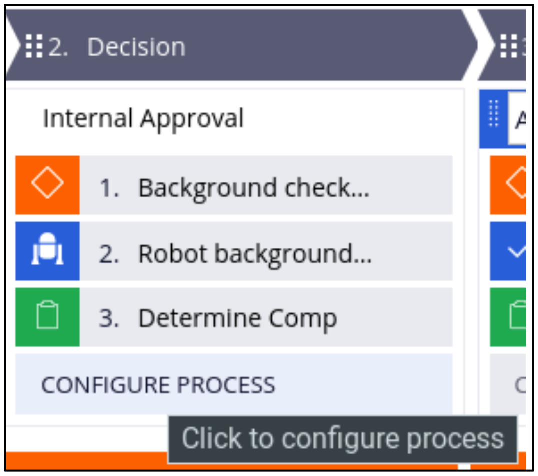
2. Select the Branch Development Icon  and toggle branch Development on.
3. From the **Branch** dropdown ensure that **ApprovalLab** branch is selected and click **Submit**.



4. Access the Case Type by clicking on **Case types** Explorer.
5. Open the **Job Applicant** case type in the case designer by clicking on the **Case type** name.

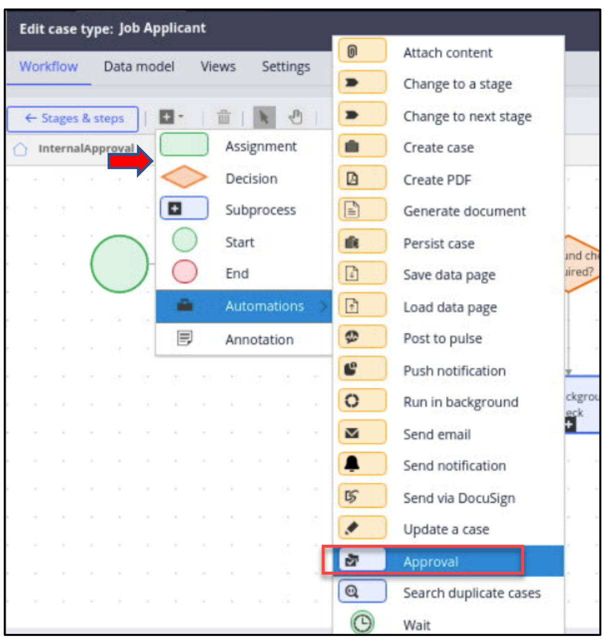


6. Open the **Internal Approval** process in the process configuration designer.



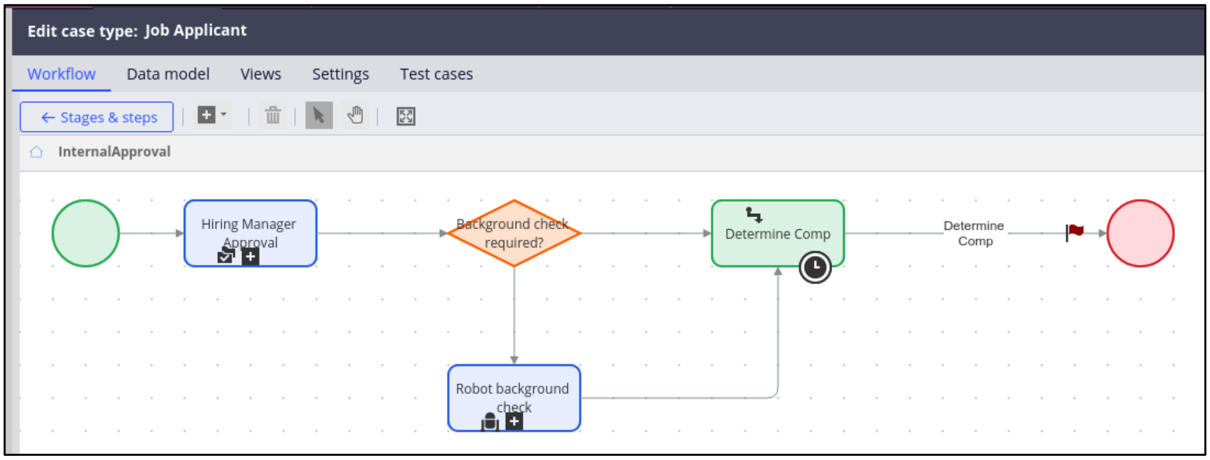
7. Add an approval shape to the flow as shown below.

   a. Click the **Add a flow shape** menu (plus icon) **> Automations > Approval** to add the Approval shape



   b. Rename the shape "**Hiring Manager Approval**" by clicking on the current title and editing it.

   c. Click on **connectors** to drag and drop connection points and connect the shape in the flow as shown below:



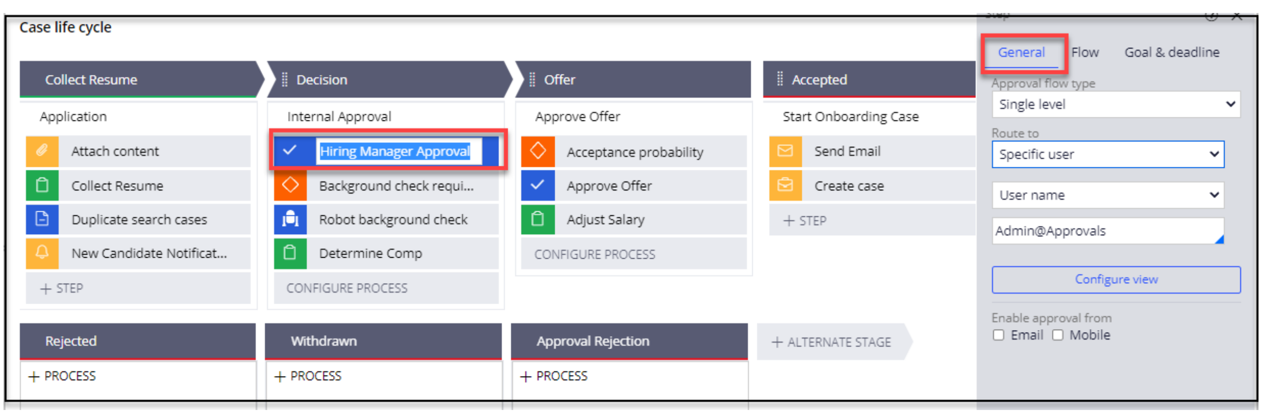
d. Click **Save**.

e. Click **Stages & Steps** to return to the Case Lifecycle Design.

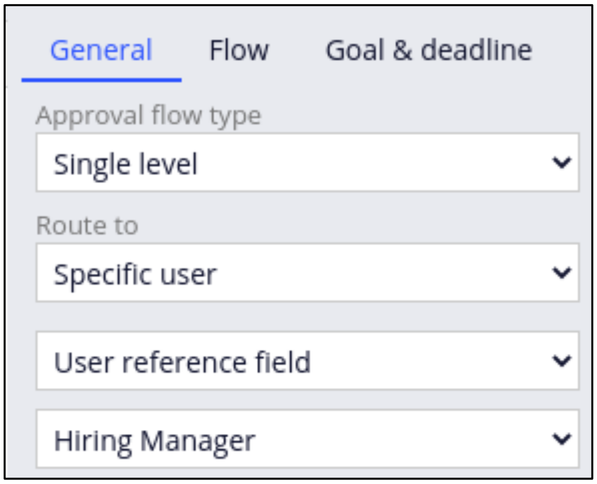
Task 2: Configure the single level approval to be routed to the Hiring Manager

1. Configure the single level approval for the hiring manager.

   a. Click on the **Hiring Manager Approval** shape to configure it.



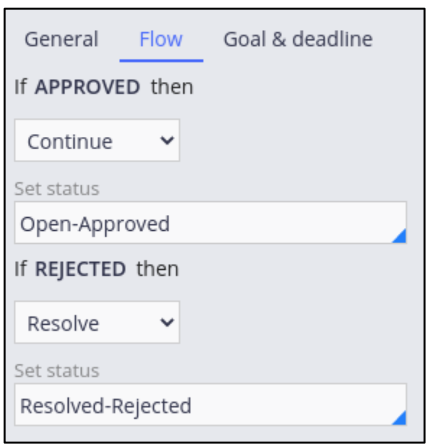
   b. Configure the **General** tab as shown in the following image:



c. Click **Save**.

Task 3: Configure the approval flow to resolve case as Resolved-Rejected if rejected by the hiring manager

1. Configure the **Flow** tab of the Approval shape as shown below:

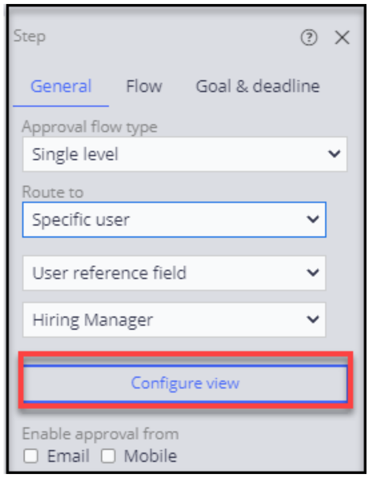


2. Click **Save**.

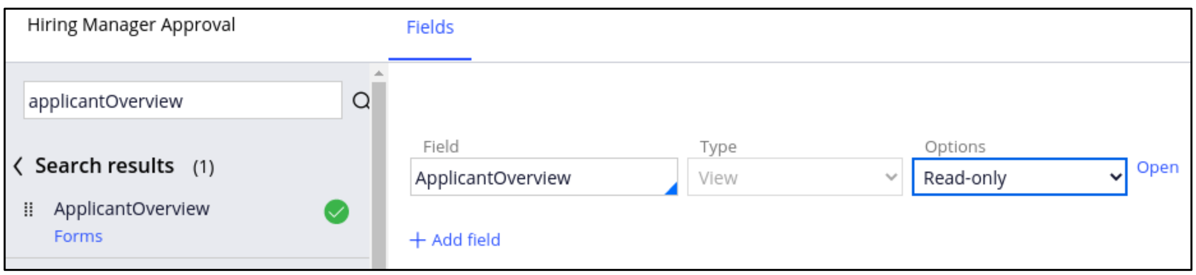
Task 4: Configure a user view for the approval

Display the existing Applicant Overview user view as read-only and add a Hiring Manager Feedback field (field does not currently exist) to the view for manager feedback

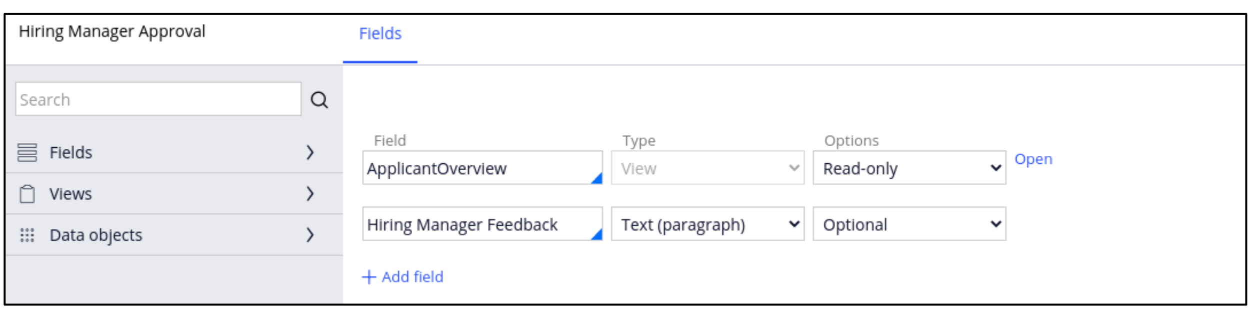
1. Select the **General** tab.
2. Click the **Configure View** button.



3. Search for "**ApplicantOverview**" and add it to the form by clicking the **+** icon to the right.
    a. Enter **ApplicantOverview** in the search box and click the **search icon**.
    b. From the Search results displayed, click the **+ icon** next to the "ApplicantOverview" field to add it to the view. Set options as **Read-only**

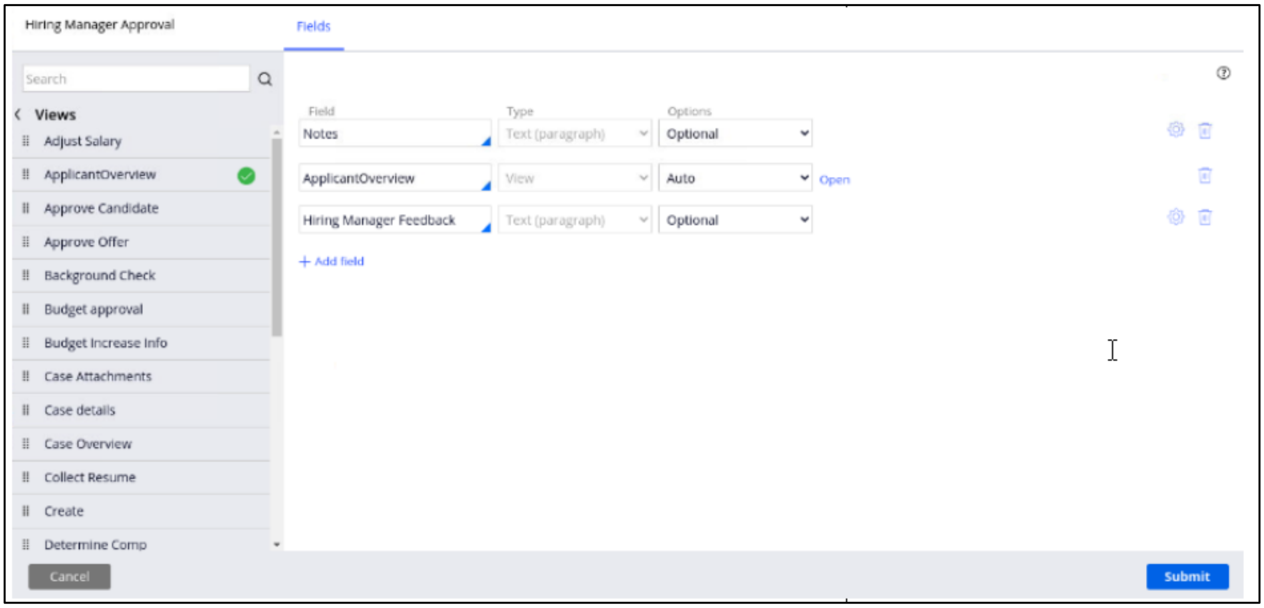


4. Add a new field to the case on the view named "**Hiring Manager Feedback**" as type **Text (paragraph)**.
    a. Click **Add Field**.
    b. Enter "**Hiring Manager Feedback**" as the field name.
5. Set Type to **Text (paragraph)**.

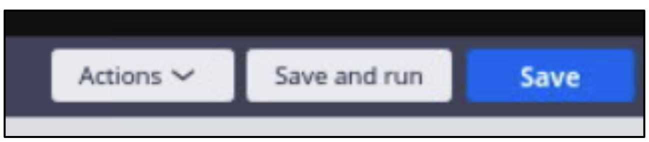


6. Click **Submit.**
7. Click **Submit** to close the Hiring Manager Approval modal window.

NOTE: If Submit does not show, adjust the zoom by decreasing the percentage until it shows.



8. Click **Save** on the case designer to save the changes.

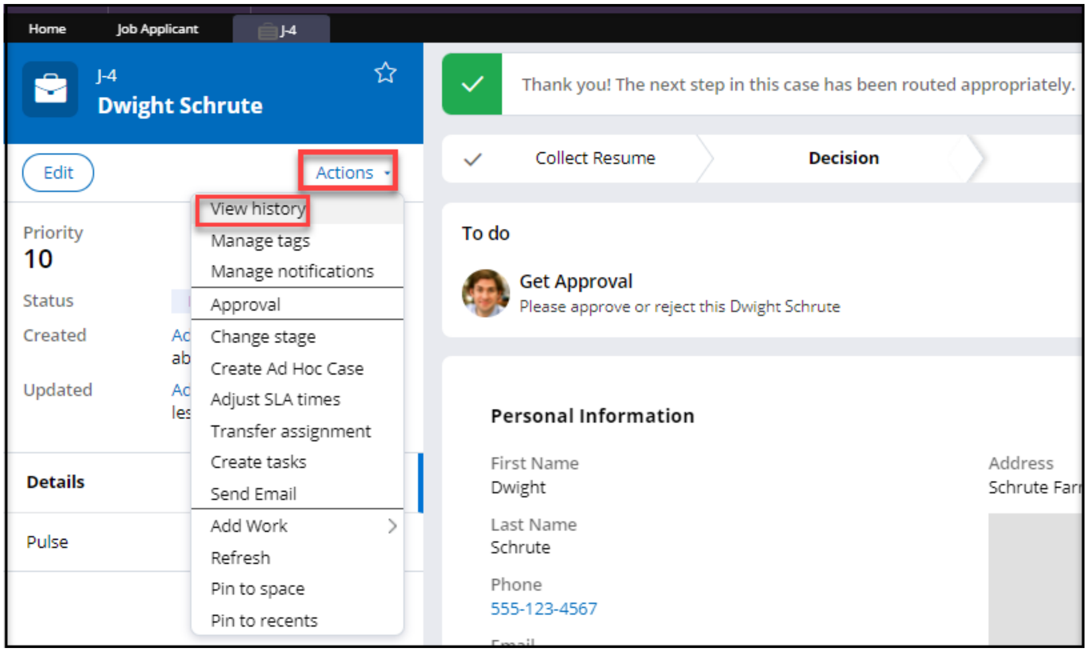


Task 5: Test results against Acceptance criteria

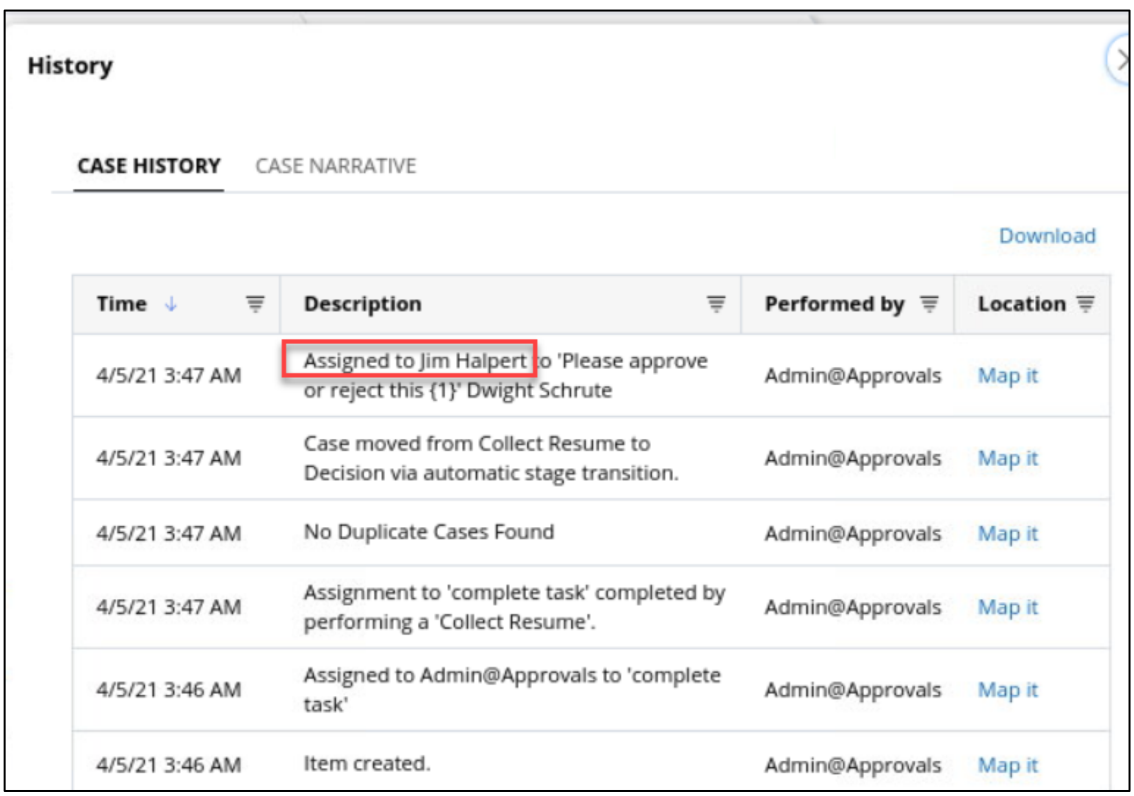
1. Click **Save and Run** for the case.
2. Click on **Submit** on the Collect Resume screen.

Note: If duplicate search logic finds any previous case for the applicant, the Display Duplicate Cases screen is displayed. Click Submit to ignore the duplicate and continue in the case.

3. Click **Actions** > **View history**.

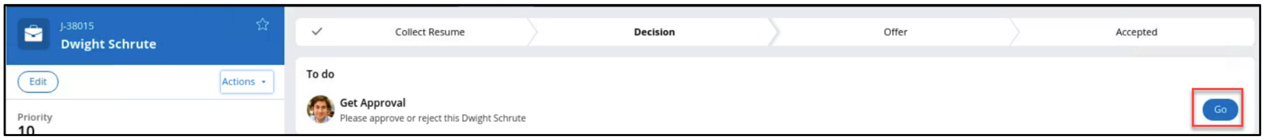


4. Confirm that the approval was **Assigned to Jim Halpert** (the hiring manager was automatically set based on the position applied for)

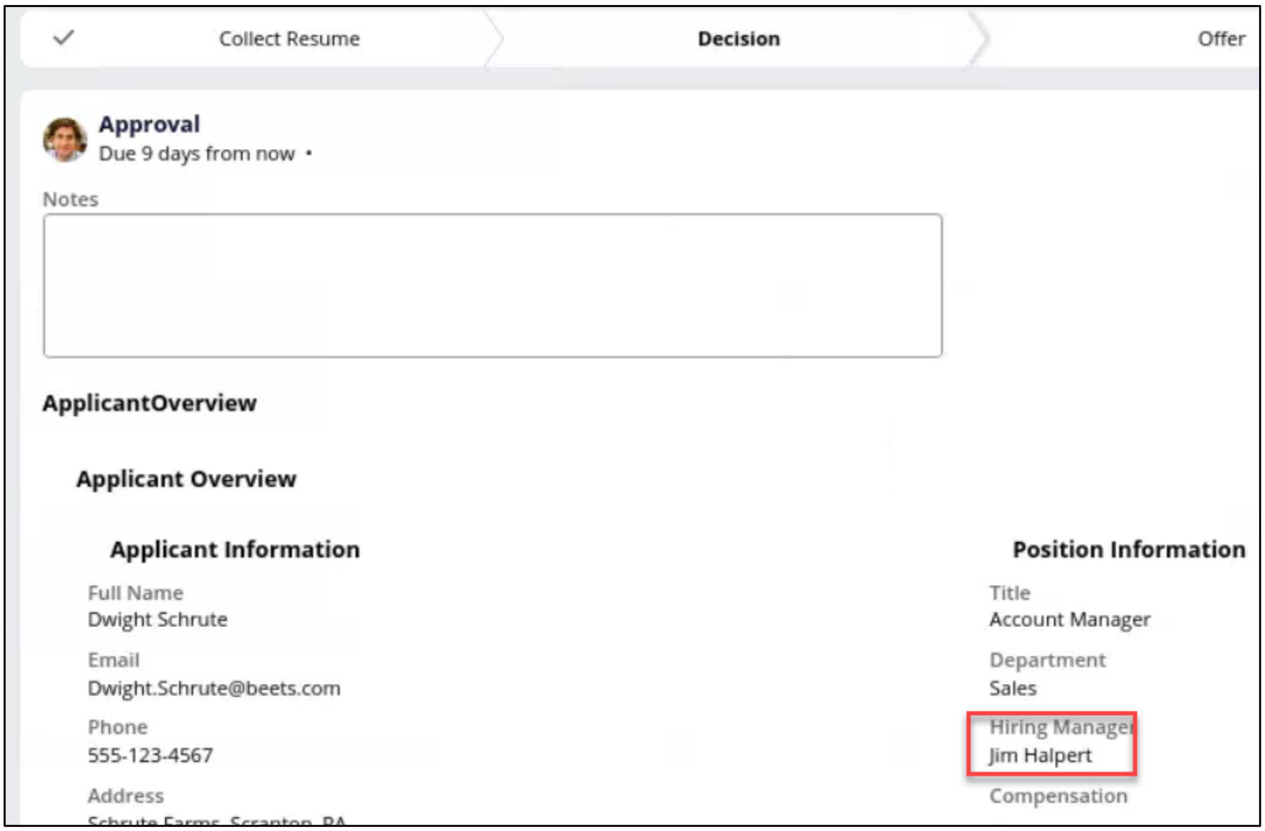


5. Close the history by clicking on the close icon.

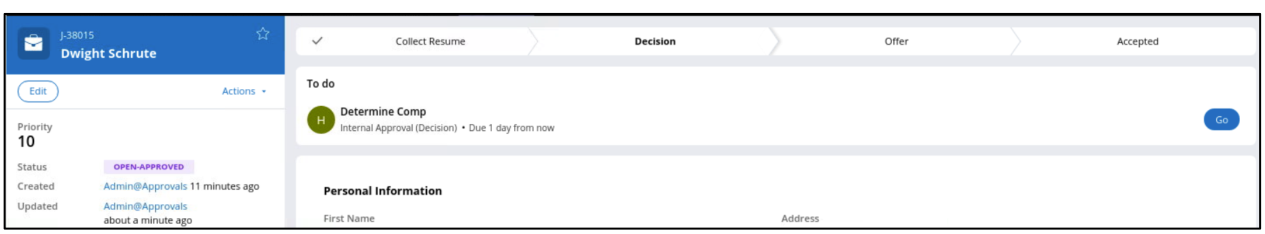
6. Click the **Go** button.



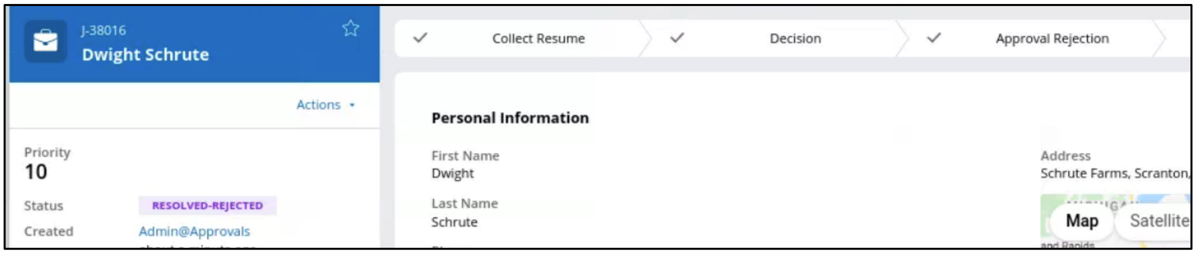
7. Confirm that you see the form below (although your data may be different):



8. Click **Approve** and Confirm case has continued to next step and status has changed to Open-Approved.



9. Navigate back to the **Job Applicant** case type and click **Save and run** again to create another case. Repeat steps 1-5 and then click **Reject** (in step 6) and confirm the case is resolved as **Resolved-Rejected.**



10. **Log Off**.

Skipping a process

Scenario

One Auto has determined that when a customer is selling a vehicle in person, they do not need to email the acknowledgment of the request to sell. They need the application updated to skip this email when the customer is selling a vehicle in person.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	Author@skip	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Task 2: Add a condition to skip sending the Request Acknowledgement email

Add a condition to skip acknowledgment mail if in-person

Task 3: Verify your work

Verify the new condition with the creation of a new case

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

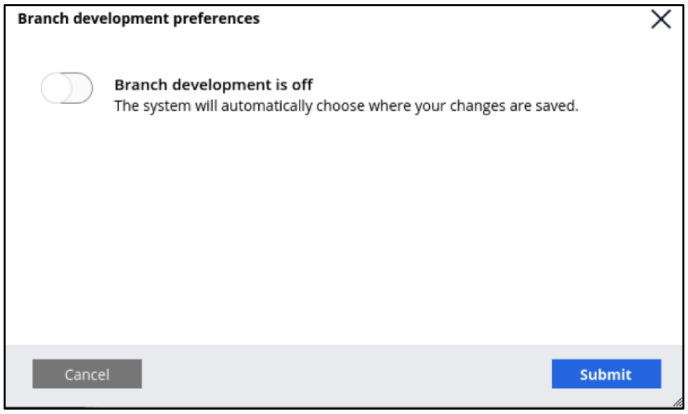
Task 1: Log in and enable branch development

1. Log in to Pega using the username **author@skip** and the password of **rules**.

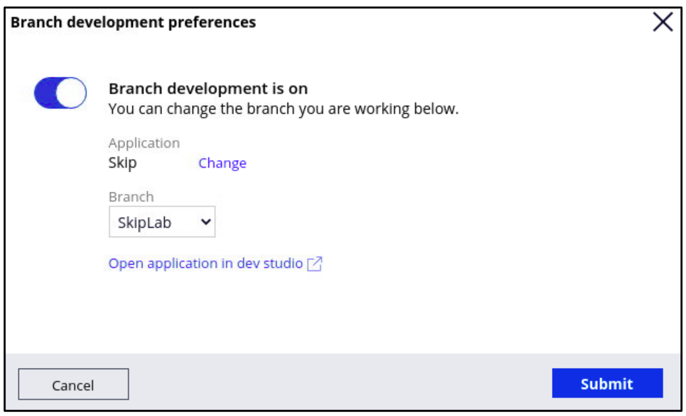
If you see the One journey at a time box, click Start now. You will see an error, click passed it as you will need to do the next step to proceed.

2. Click the Toggle branch development button from the title bar.

3. The following appears:

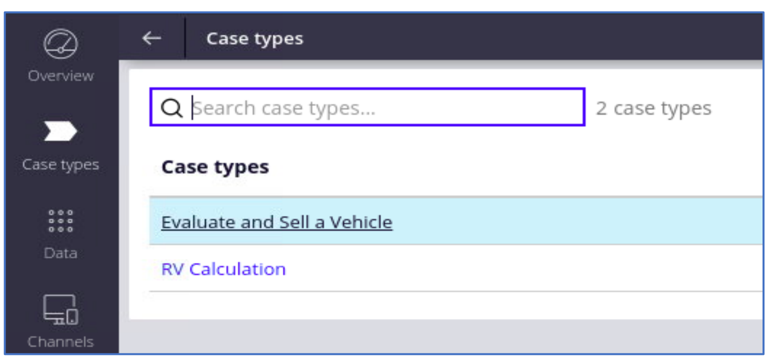


4. Move the slider to turn branch development on. From the Branch dropdown ensure that **SkipLab** is selected and click **Submit button.**

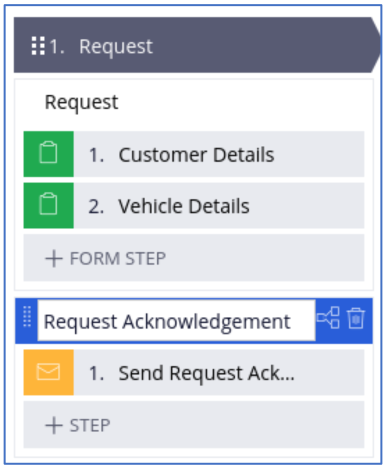


Task 2: Add a condition to skip sending the Request Acknowledgement email

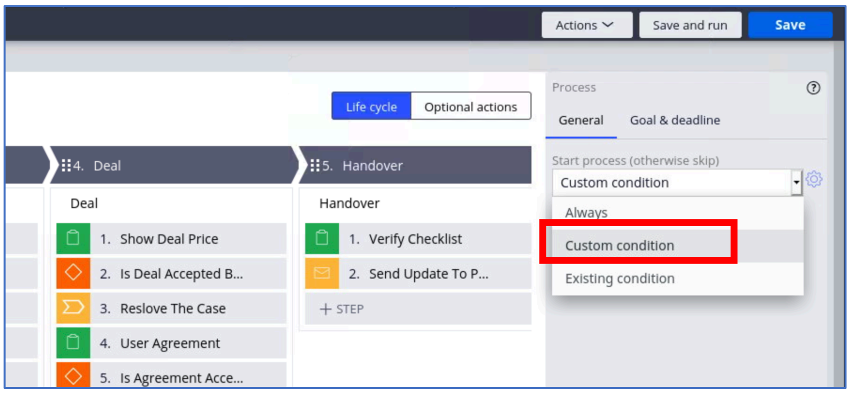
1. Open the Case: **Case Types > Evaluate and sell a vehicle.**



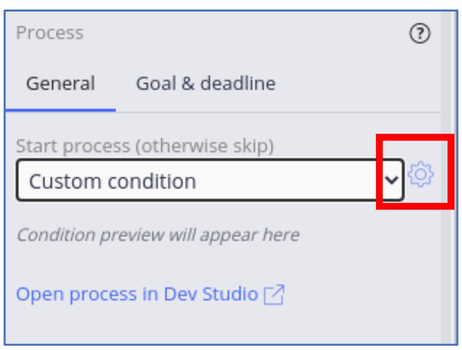
2. Select the process **Request Acknowledgement**.



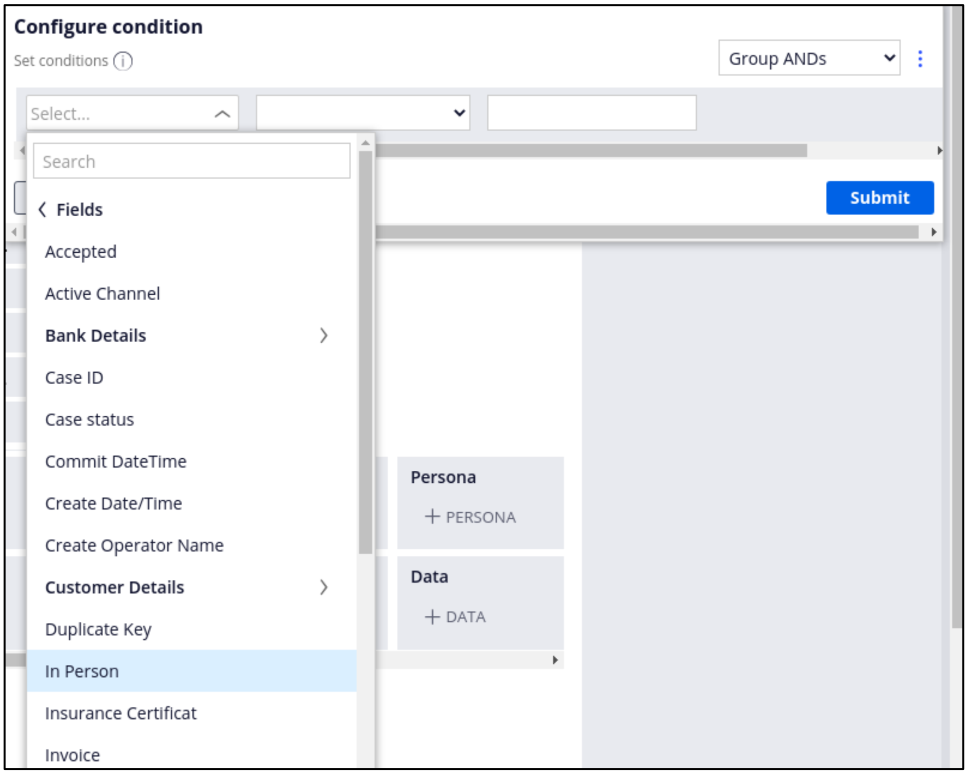
3. In the context menu select **Custom Condition** from the Start process drop-down.



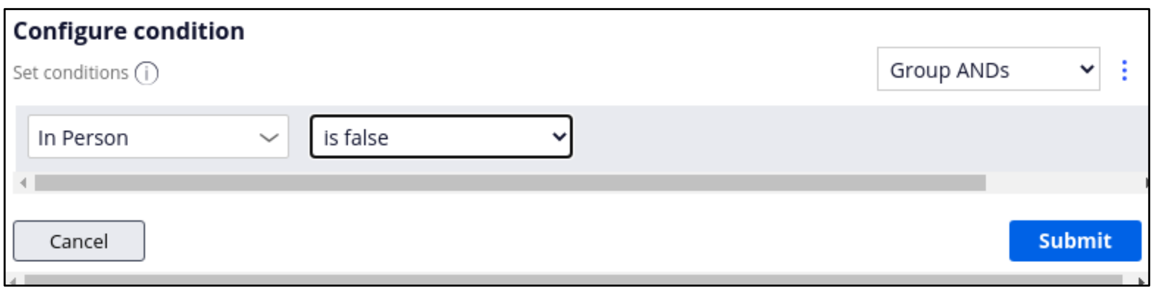
4. Click the gear icon that appears to the right of the drop-down list.



5. In the pop up select the **field** for **In Person.**



6. Select **Is false** from the second drop-down.

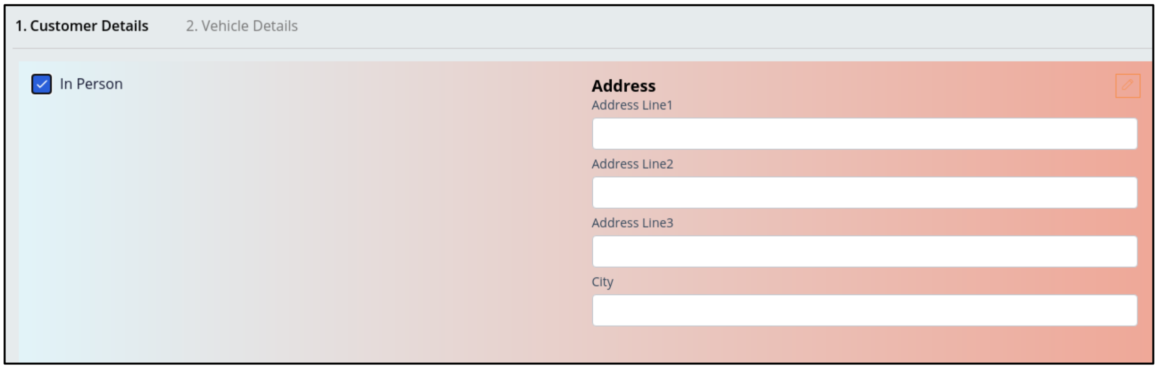


7. Click **Submit** and then click **Save** on the Case type.

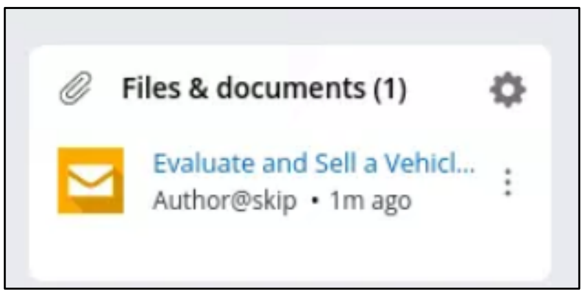
Task 3: Verify Work

In-Person checked

1. Click **Save and run** to create an instance of the case type **Evaluate and sell a vehicle.**
2. Check the **In Person** checkbox then click **Continue.**



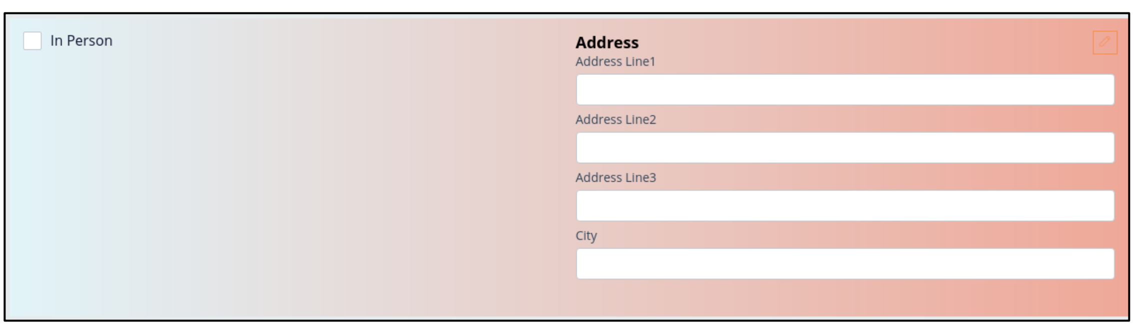
3. Click **Finish.**
4. Click **Go** on the next screen.
5. Click **Actions > Refresh**.
6. In the **Files and documents** section on the right, verify that the "**Request Acknowledgement"** email is not created. The Request Acknowledgement process was skipped.



NOTE: If you do not see the **Files and documents** section, click this icon ↤ at the right corner of the case.

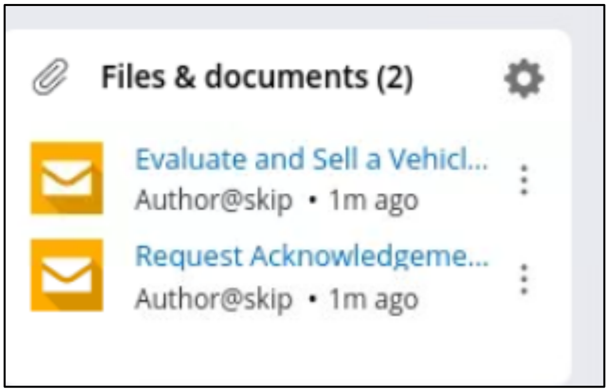
In-Person unchecked

1. Create a new instance of the case type **Evaluate and sell a vehicle.**
2. Leave the **In Person** box **unchecked** then continue.



3. Click the **Finish** button.
4. Click **Go** on the next screen.

5. Click **Actions > Refresh**.
6. The **Files and documents** section will display a Request Acknowledgement email. This shows the Request Acknowledgement process was not skipped for not in person.



7. **Log off**.

Duplicate Searches

Scenario

The Auto Application Case Life Cycle, Evaluate and Sell A Vehicle has been defined. The application has been running in production for several weeks and an issue has arisen. A vehicle has been processed twice to be sold. After review, it was decided that the initial request will be checked to determine duplicate vehicle entries.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	Author@TempDup	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login in and enable branch development

Enable branch development to allow modification of cases.

Task 2: Add a duplicate search step

Add a Search for Duplicate Case

Task 3: Testing Duplicate Search

Verify the configurations identify duplicate cases

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

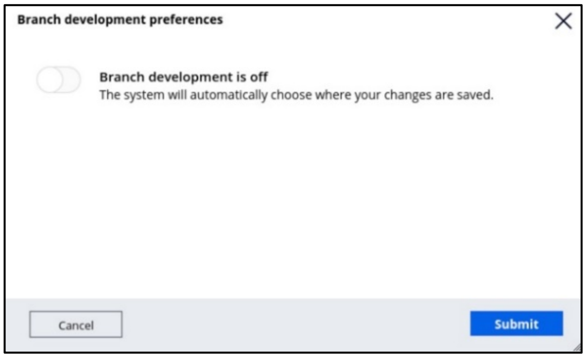
Task 1: Login and enable branch development

1. Log into **AppStudio** using the username ***Author@TempDup*** and the password of ***rules***.

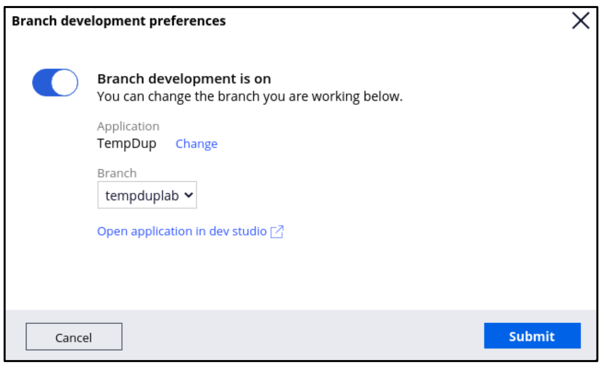
NOTE: If you see the dialogue box “One journey at a time” click **Start Now**. We do not need to enable this feature for this lab. Ingore the warning and click **close**.

2. From the title bar click the **Toggle branch development** button.

3. Move the slider to turn branch development on.

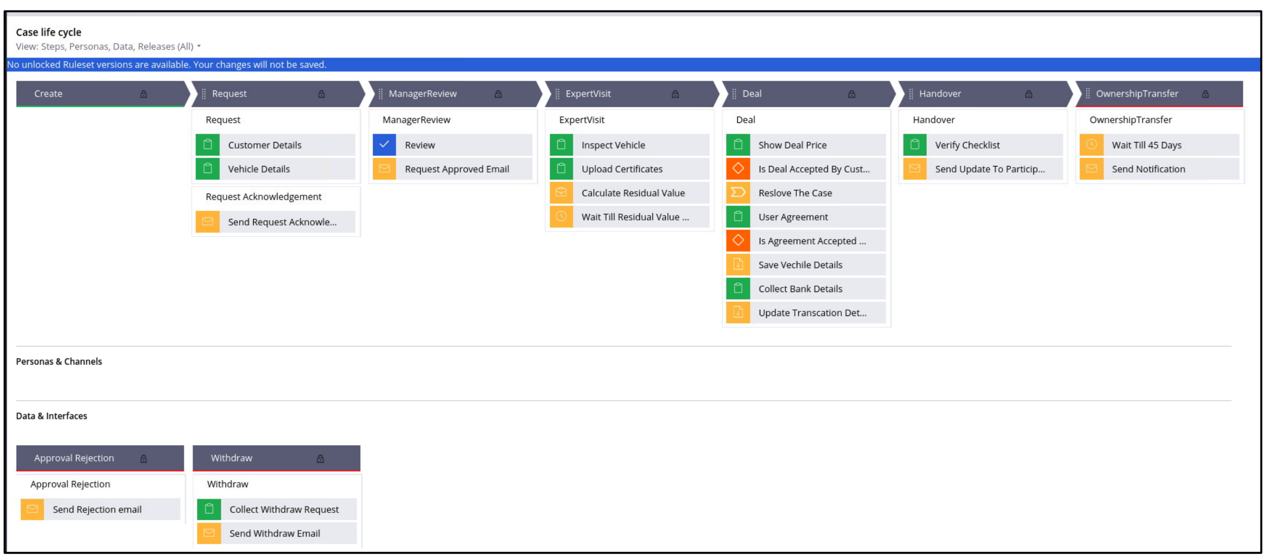


4. The following screen appears. From the **Branch** dropdown ensure that **tempduplab** is selected and click **Submit**.

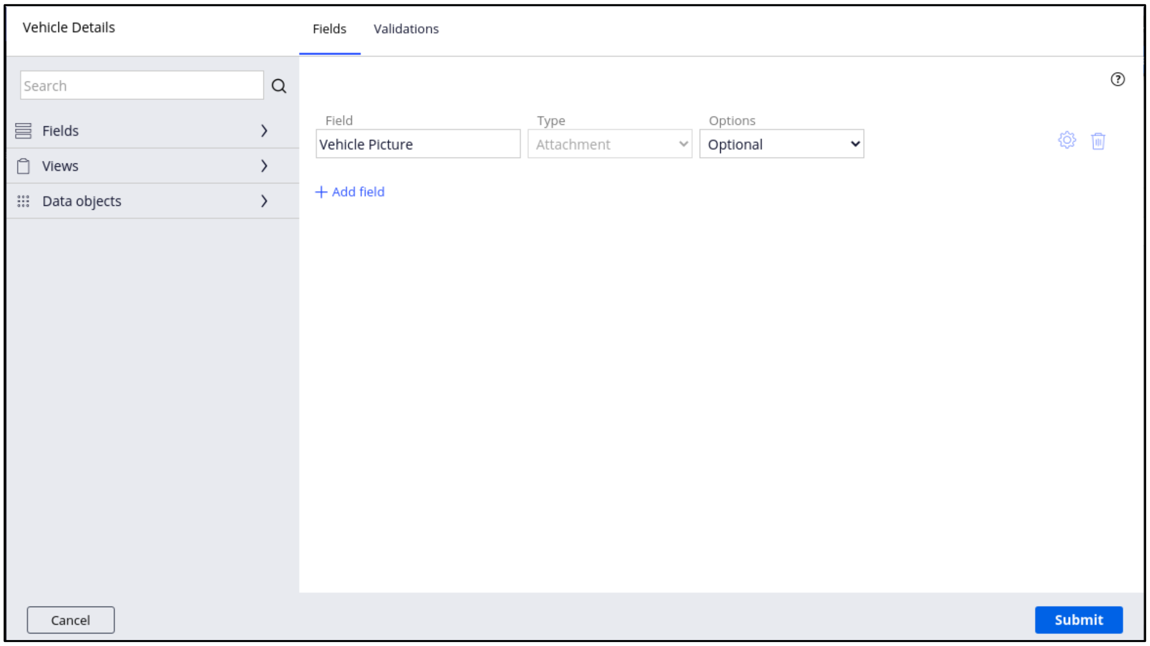


Task 2: Add a duplicate search step

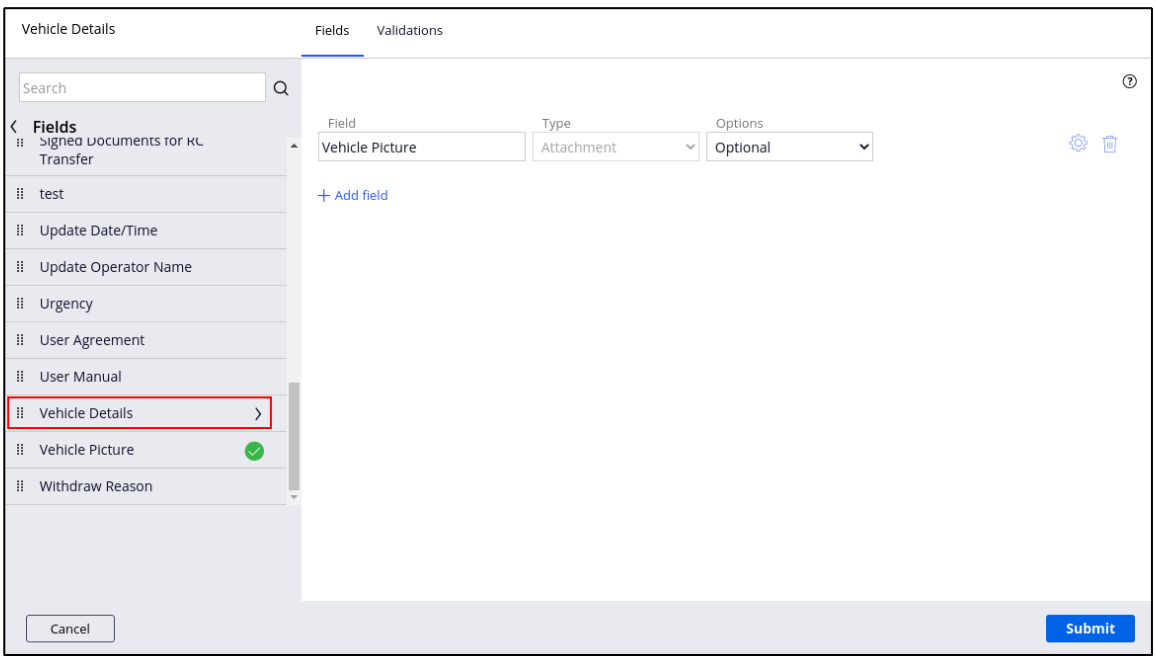
1. Select **Case types > Evaluate and Sell a Vehicle** to open the case type.
2. Select the **Vehicle Details** step in the **Request** stage of the **Request** process.



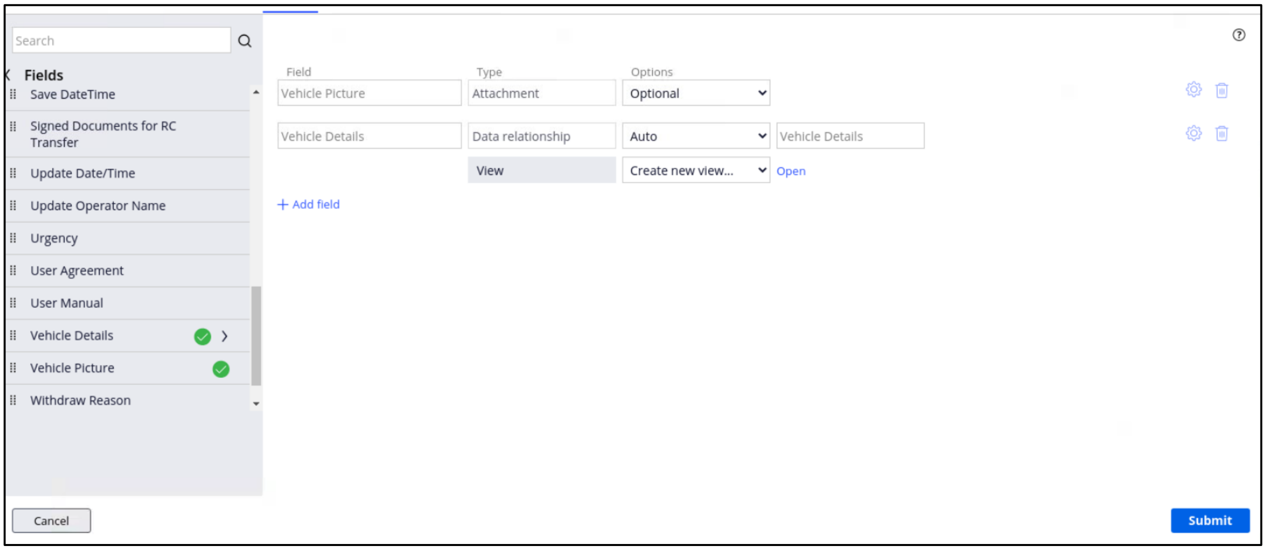
3. Click the **Configure view** button on the right to configure the view for the step.



4. Expand **Fields** (on the left side of the window) and locate **Vehicle Details**.



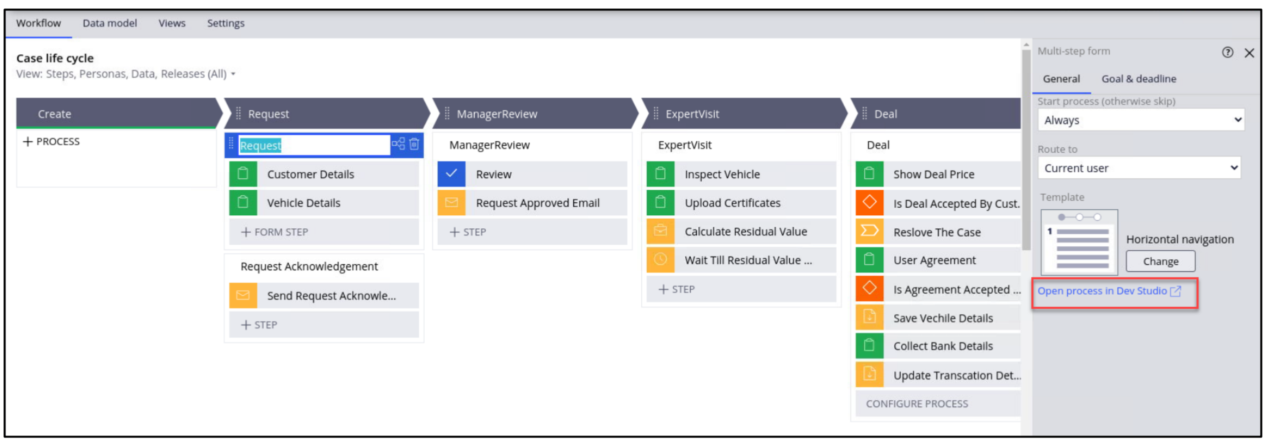
5. Hover over **Vehicle Details** and click the **+** symbol to add the field to the view.



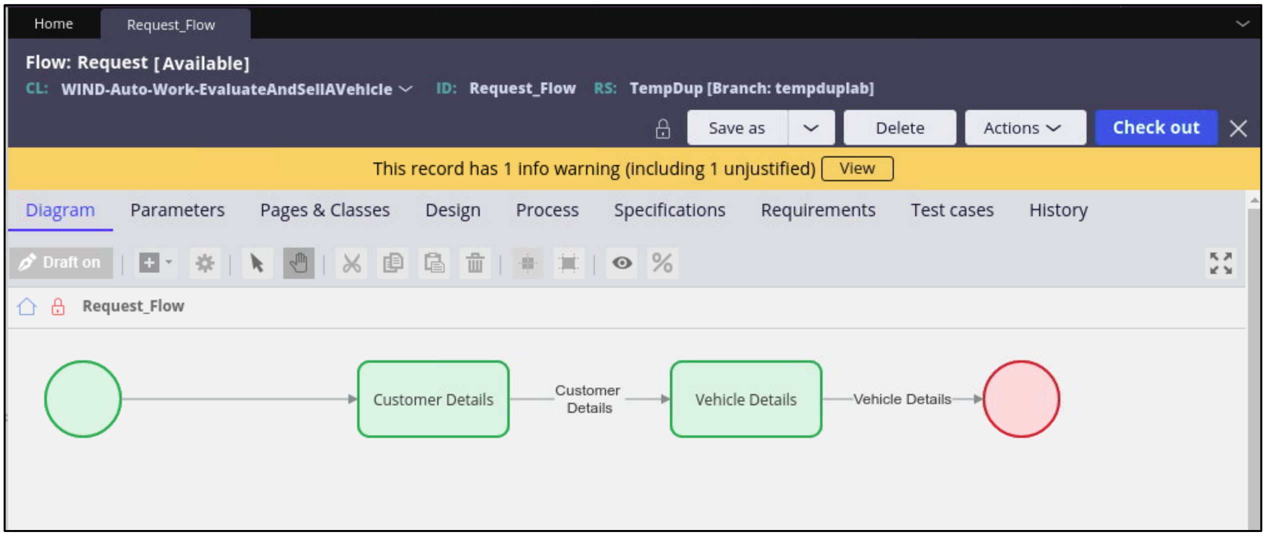
6. Click **Submit**.
7. Click **Save** to save the changes to the case type.

> **NOTE**: You would normally add the Duplicate Search Cases step to the case type from **Case Designer**. But because it must to be included in a **Multi-Step Form,** the flow (process) must be modified directly.

8. Select the **Request** process and **Open process in Dev Studio** to configure the flow.

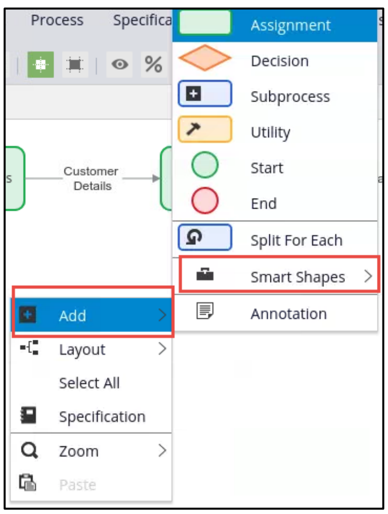


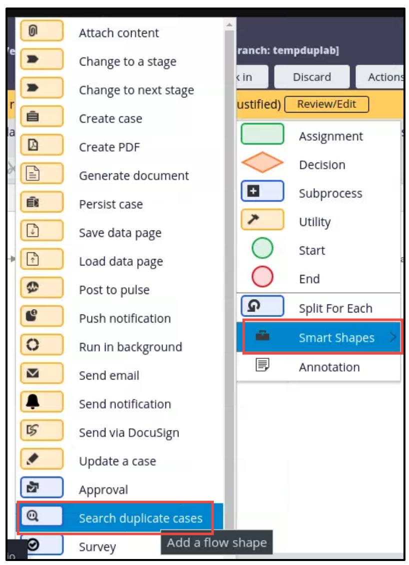
9. The flow rule will open on a separate tab. The flow rule is locked for editing. Click **Check out**.



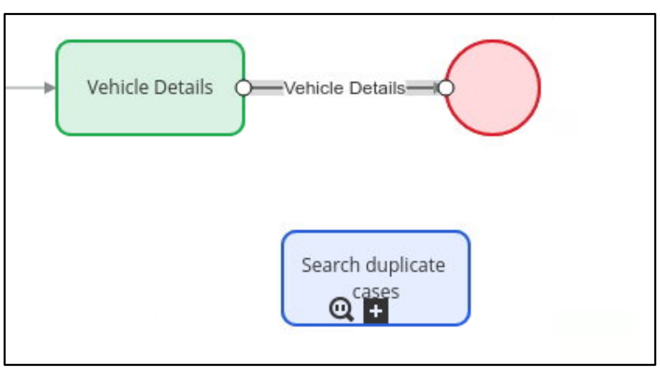
10. Add a Duplicate Smart Shape to the process.

   a. Right-click in the pallet, **Add** a **Search duplicate cases** shape to the process.



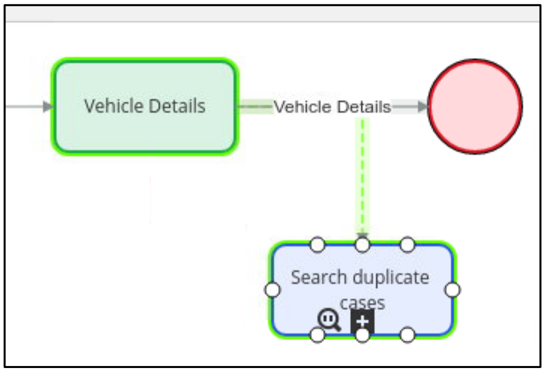


   b. Reuse the existing connector **Vehicle Details**. Select the connector to activate it.

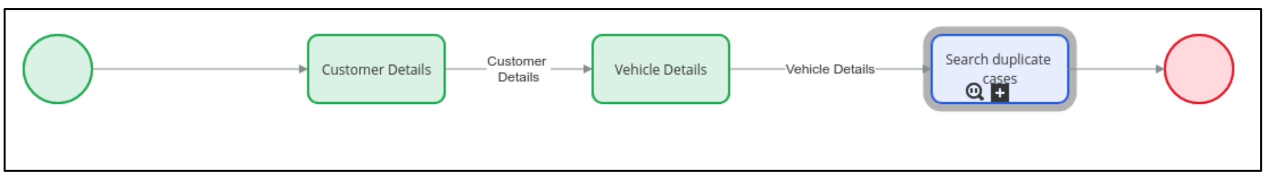


c. Click on the handle, the white circle at the connector arrow, and drag it to the middle of the Search duplicate cases shape. *Make sure that both of the shapes and connector are glowing green before you release the connector.*

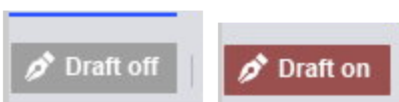
NOTE: Glowing green means the connector has been locked to the shape.



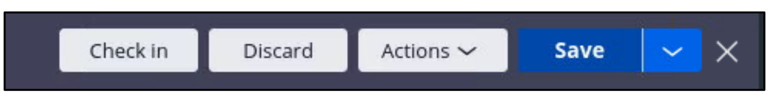
d. Drag a connector out of the **Search duplicate** cases shape to the **end shape**. Rearrange the shapes to look like the image below.



11. Turn **Draft on**.

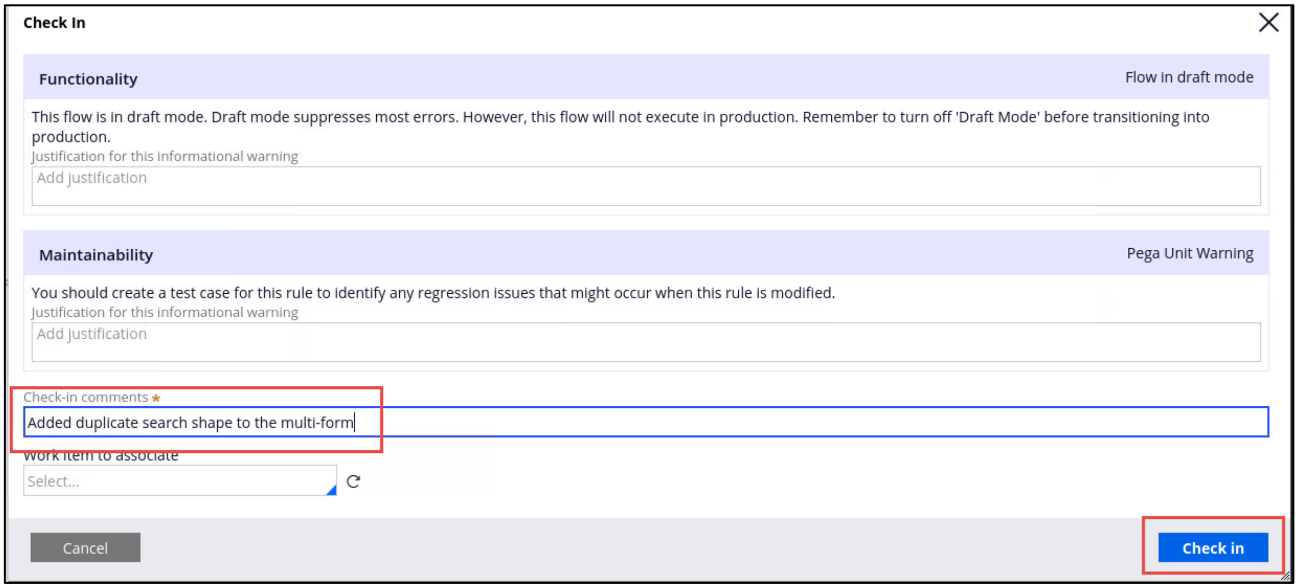


12. Click **Save.**



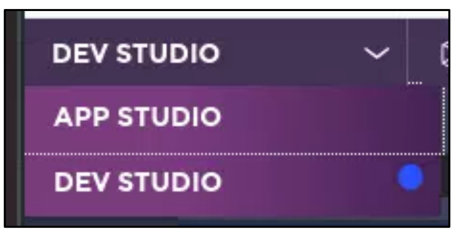
13. Click **Check-in**.

14. Enter a **Check-in comment**. Click **Check in**.

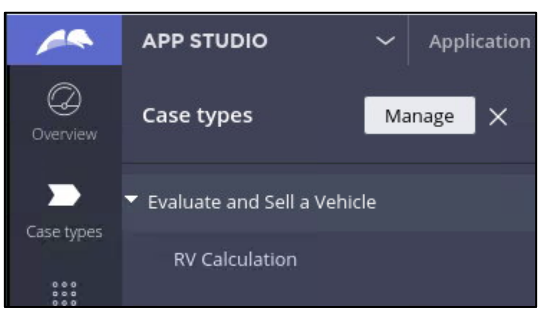


15. Close the flow by clicking **X**.

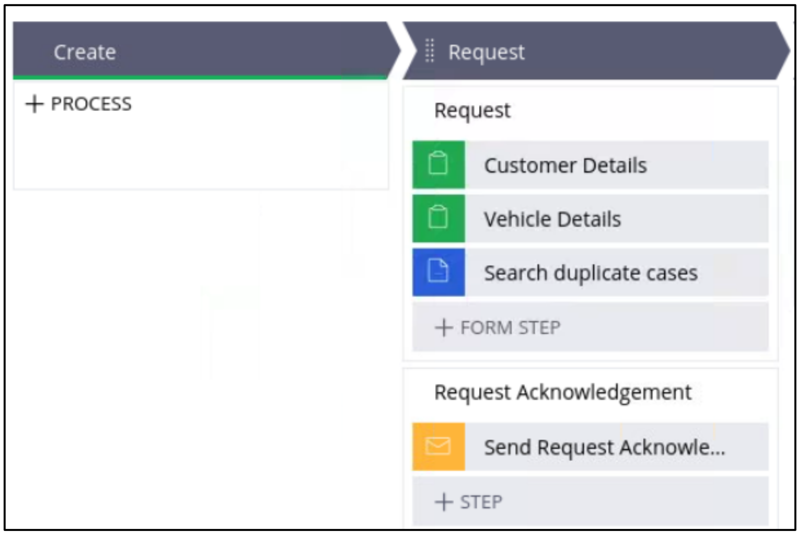
16. Switch back to **App Studio**.



17. If the case type is still active on the screen. Select **Actions > Refresh** to refresh the case type. Otherwise, open the case type again.

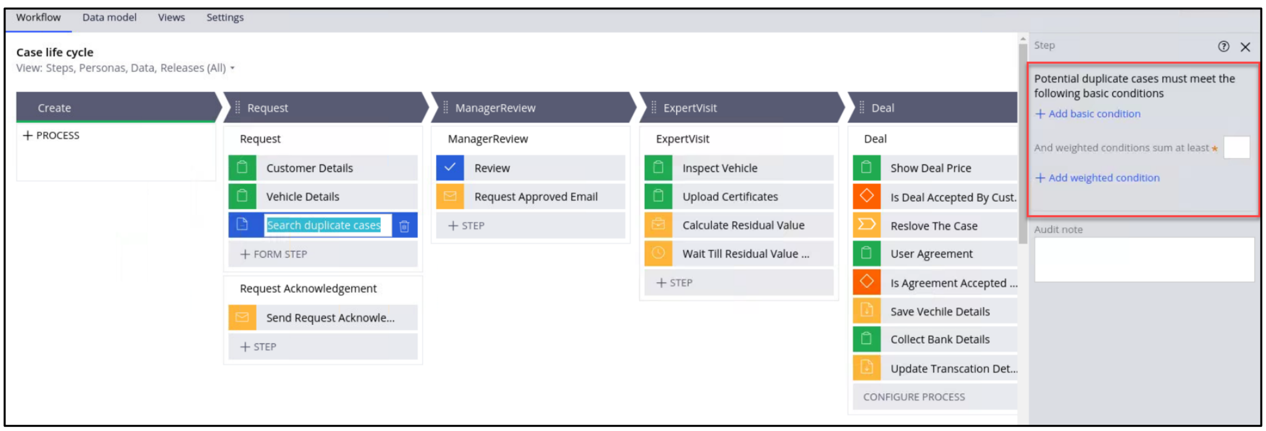


18. The **Search duplicate cases** shape will now appear in the Request stage.

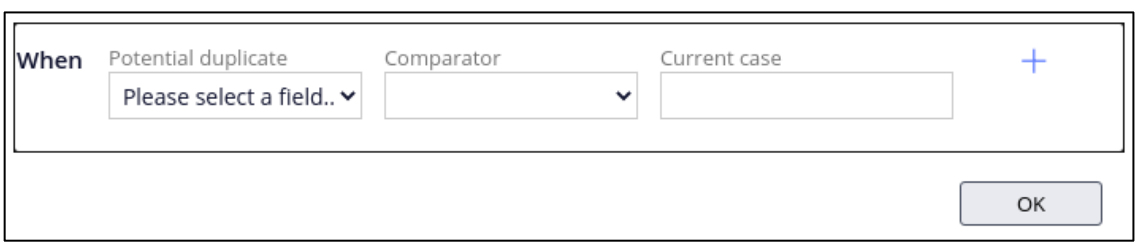


19. **Save** the changes to the case type.

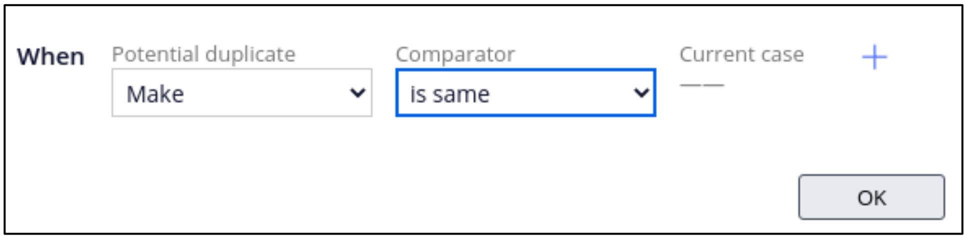
20. Select the **Search duplicate cases** shape to view the configured settings for the step.



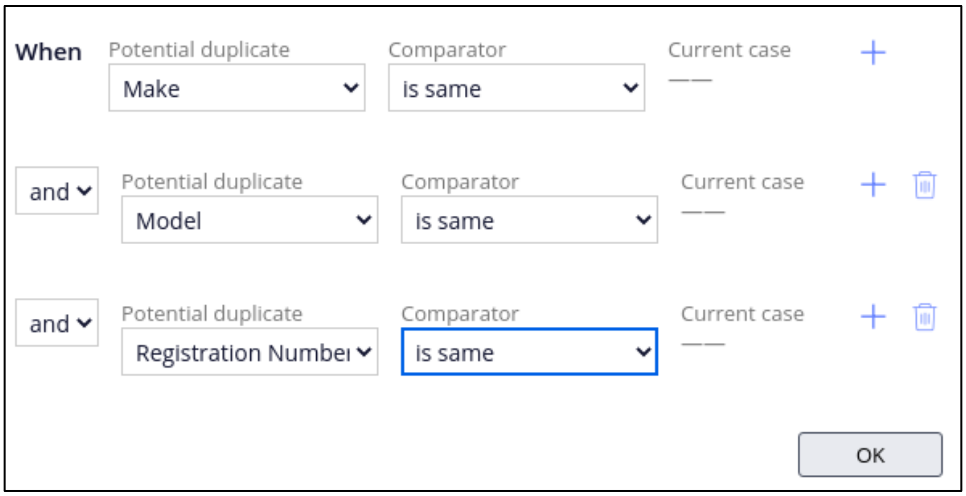
21. Click **+ Add basic condition**. The following appears.



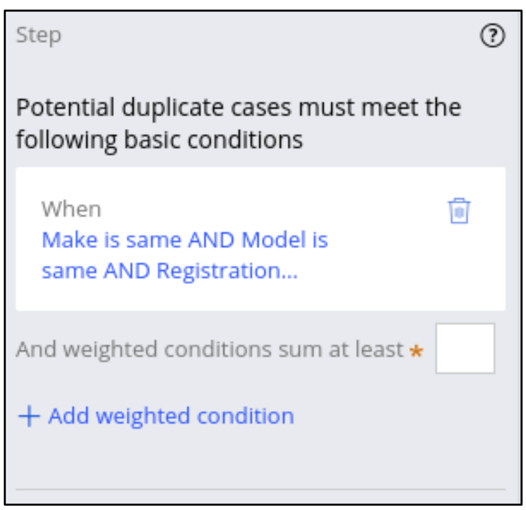
22. From the Potential duplicate field select **Vehicle Details > Make** and Comparator **is same**. (Since the list is alphabetical, you will need to scroll down.)



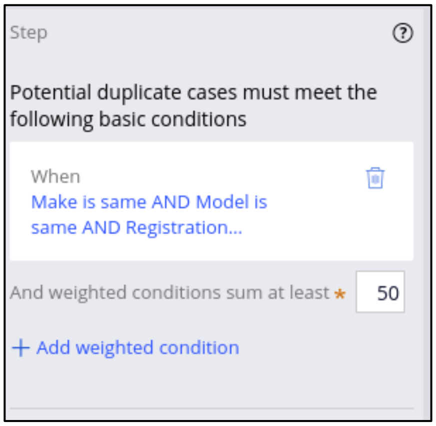
23. Using the **+** symbol repeat step 21 to add **Vehicle Details > Model** and **Vehicle Details > Registration Number** to the basic condition as follows.



24. Click **OK**. The following appears for the step basic conditions.

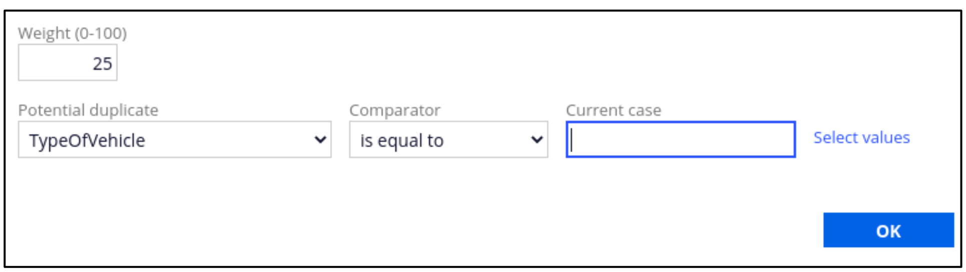


25. Enter 50 into **And weighted condition sum at least** field.

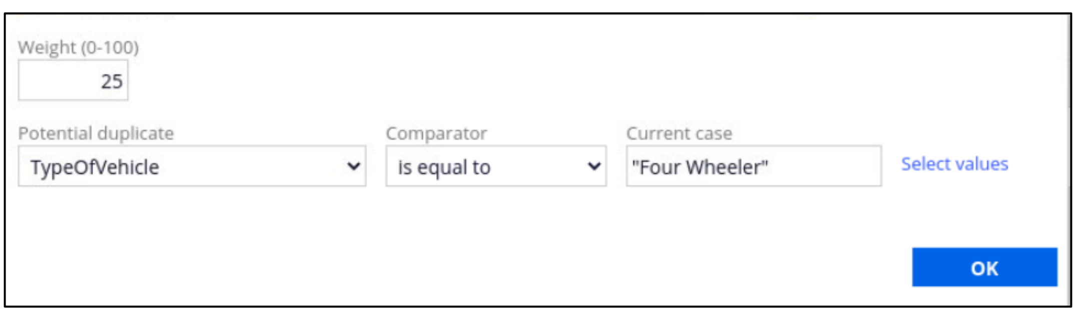


26. Click **+ Add weighted condition**. The following appears.

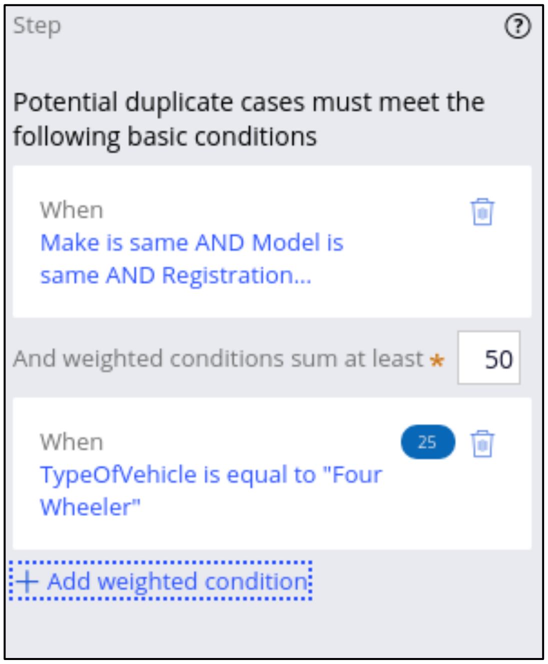
27. Enter 25 for Weight and select **is equal to** as the Comparator. Potential Duplicate as **Vehicle Details > TypeOfVehicle**.



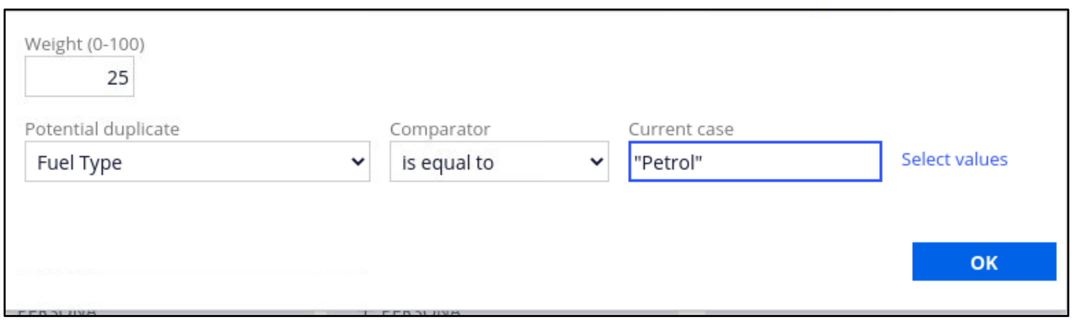
28. In the **Current case** field, enter **"**Four Wheeler"**.**



29. Click **Submit** then **OK** to add the weighted condition.

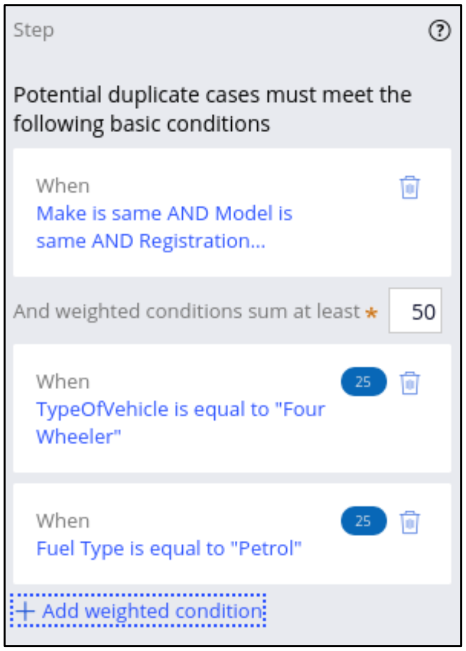


30. Repeat steps 25 to 27 to add a second weighted condition with the following settings.

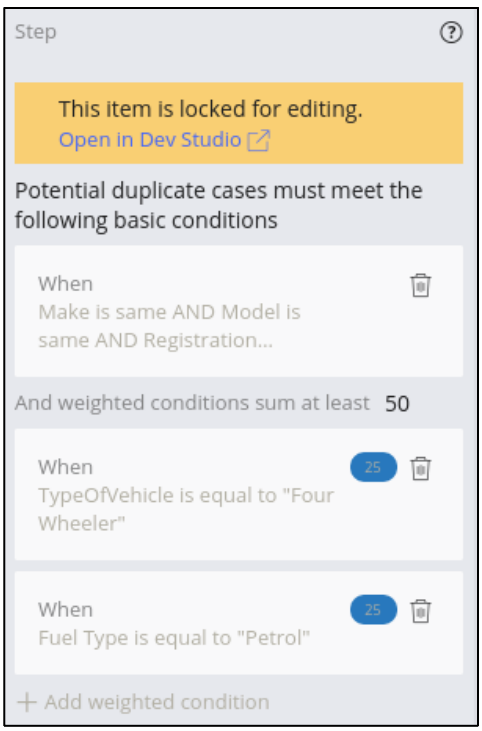


	Field	Enter value
31.	Weight	25
32.	Potential duplicate	Vehicle Details > Fuel Type
33.	Comparator	Is equal to
34.	Current case	“Petrol”

35. The following will now appear:



36. **Save** the changes to the case. The following will appear.



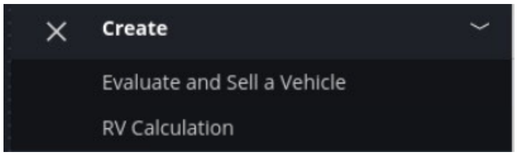
IMPORTANT: This means that any further changes to the Duplicate search step will need to be made to the Case Match rule in Dev Studio.

Task 3: Testing Duplicate Search

1. Create two case instances for **Evaluate and Sell a Vehicle**.

a. Click Preview

b. Click the **Create** > **Evaluate and Sell a Vehicle**

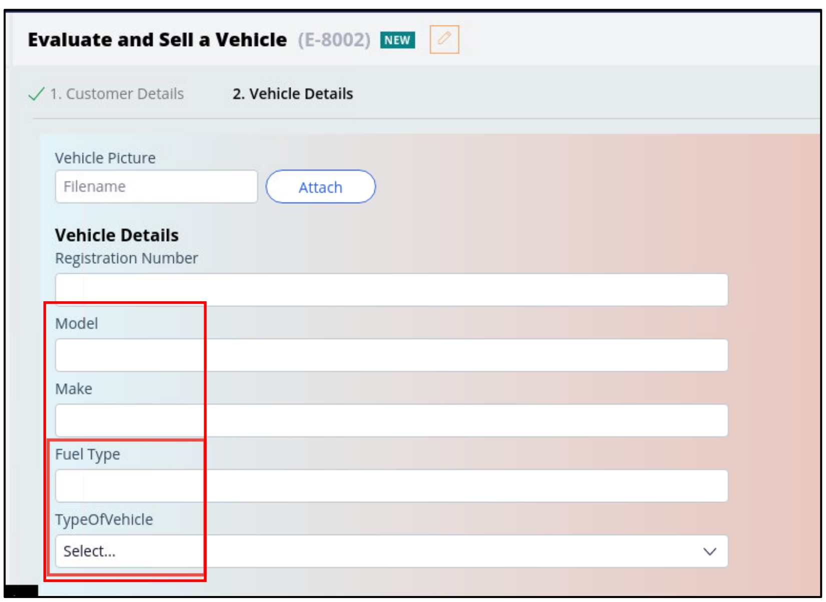


c. The create form opens. Click **Done.**

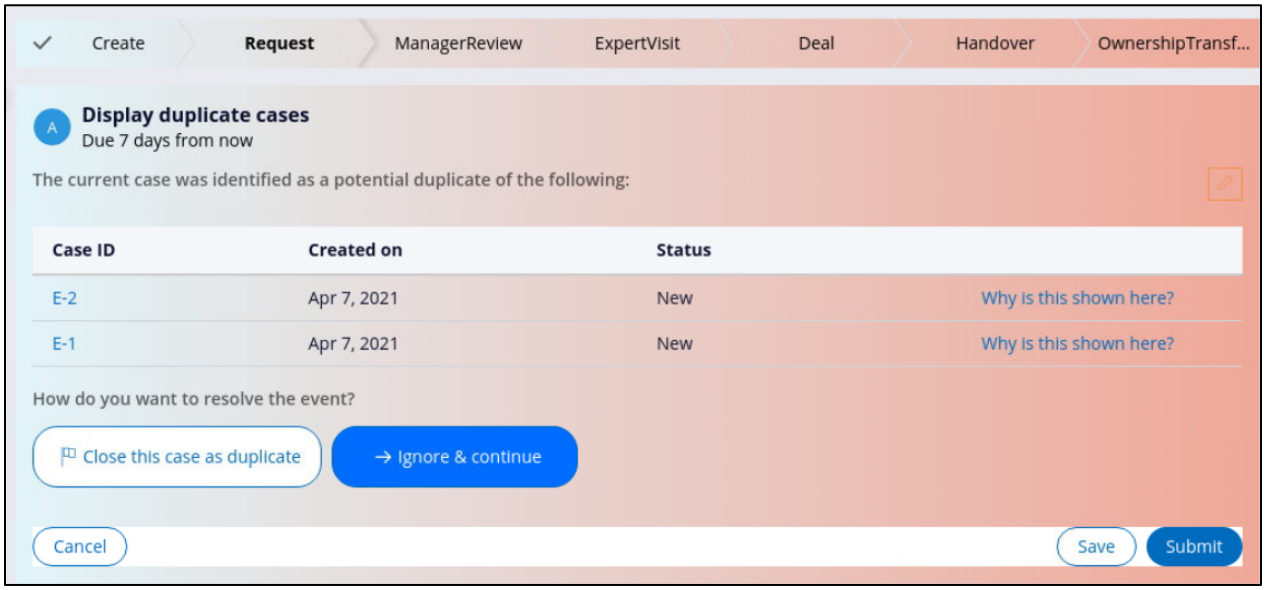
d. The customer details form opens. Click **Continue**.

e. The vehicle details form opens. **Enter the following** and then click **Finish**.

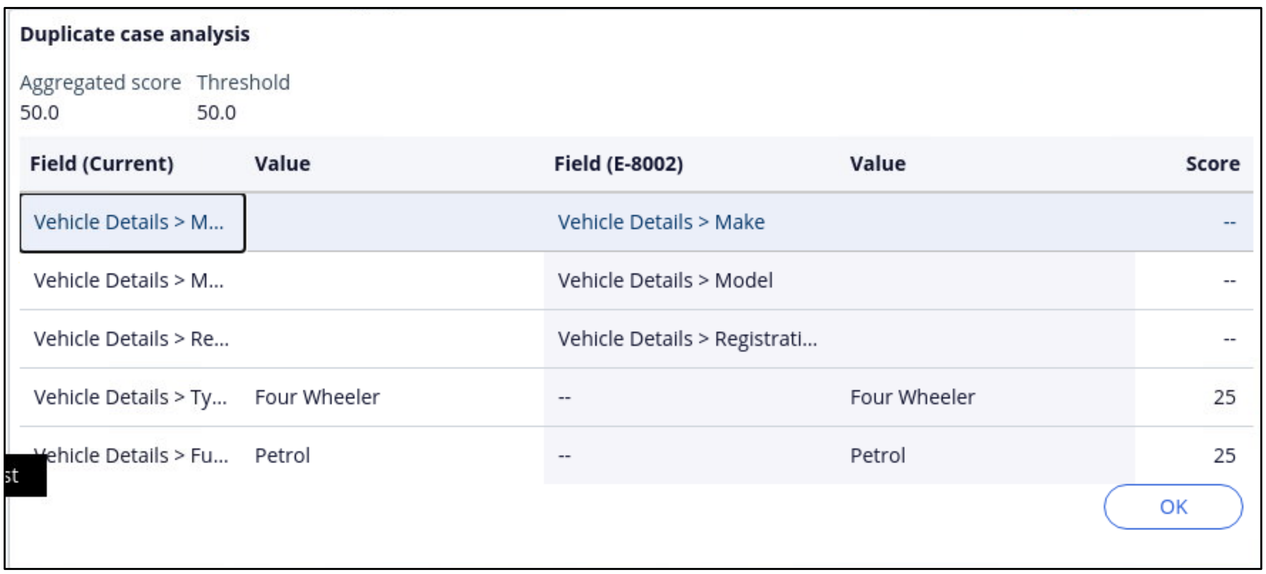
Must Match	**Model**	Bronco
	Make	Ford
Weighted Match	**Fuel Type**	Petrol
	TypeOfVehicle	Four Wheeler



2. Create a second/third case following the previous steps. The following will appear after the second case is processed.



3. This indicates that a duplicate has been identified.
4. Click the **Why is this shown here?** link to see the values on both cases for the reason why it was selected.



5. **Log off**.

Sending Correspondence

Scenario

Mobile+ has requested that a receipt is emailed to the customer after making a payment when creating a new connection for a device.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Citizen Developer	author@corrB	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development
Login.

Task 2: Add Send Email step
Add a Send Email step to the Payment process

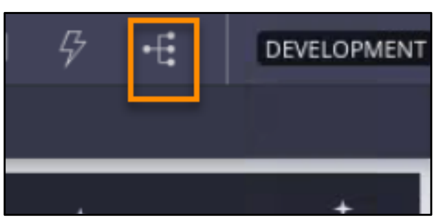
Task 3: Verify your work
Run the case type and verify the changes

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

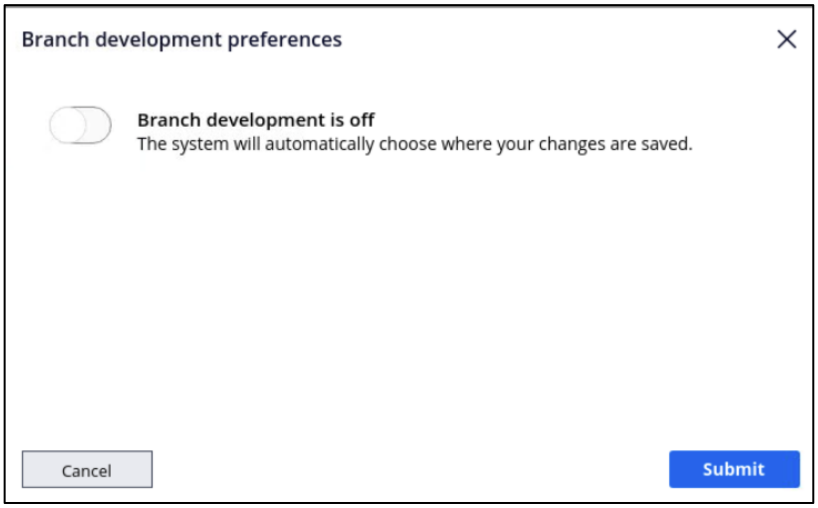
Detailed Steps

Task 1: Login and enable branch development

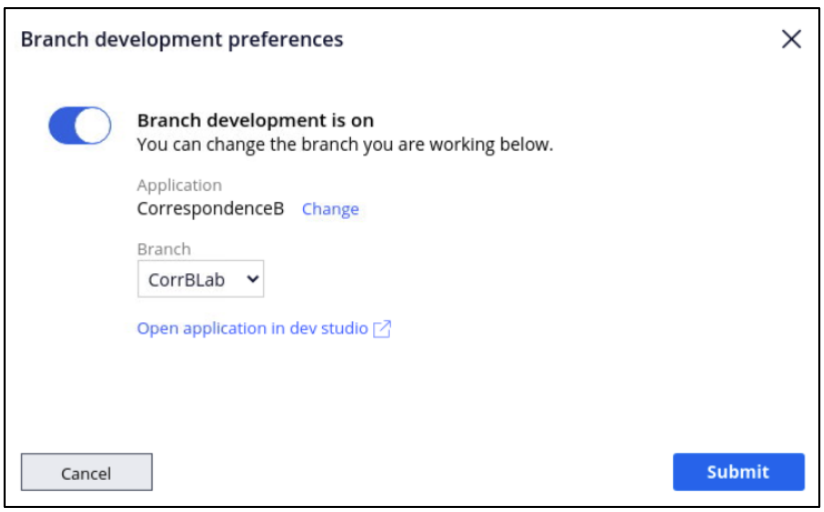
1. Log in and use the credentials **author@corrB** and **rules**.
2. From the title bar click the **Toggle branch development** button.



The following appears.:

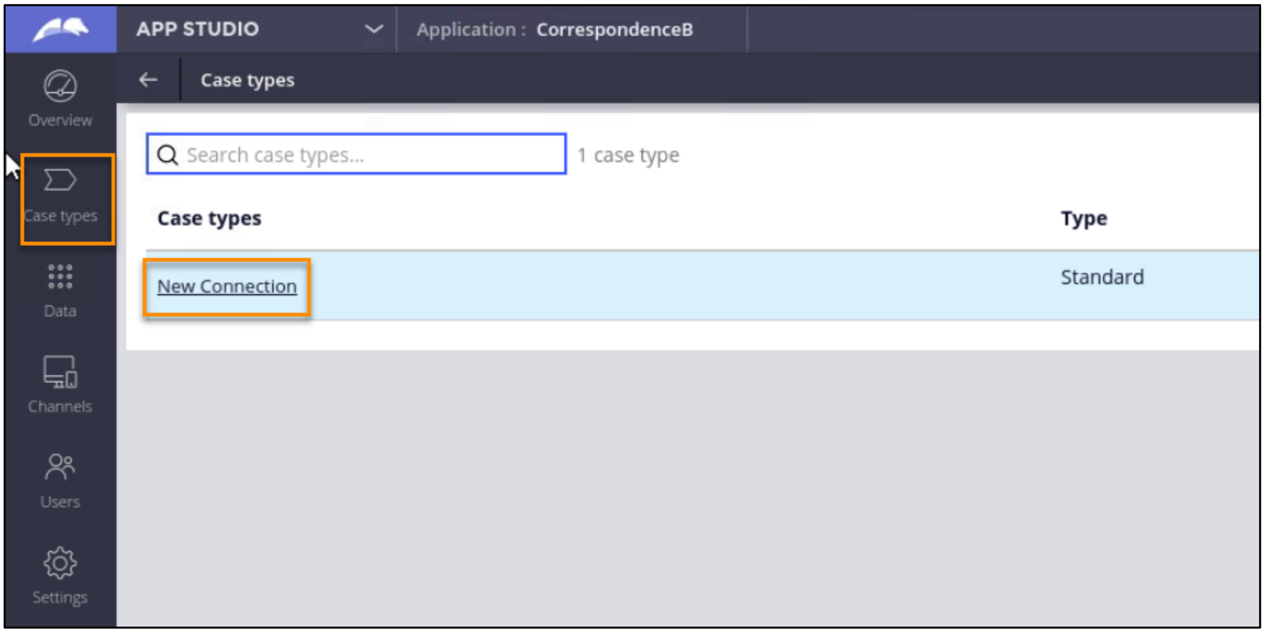


3. Move the slider to turn branch development on.
4. From the **Branch** dropdown ensure that **CorrBLab** is selected and click **Submit**.

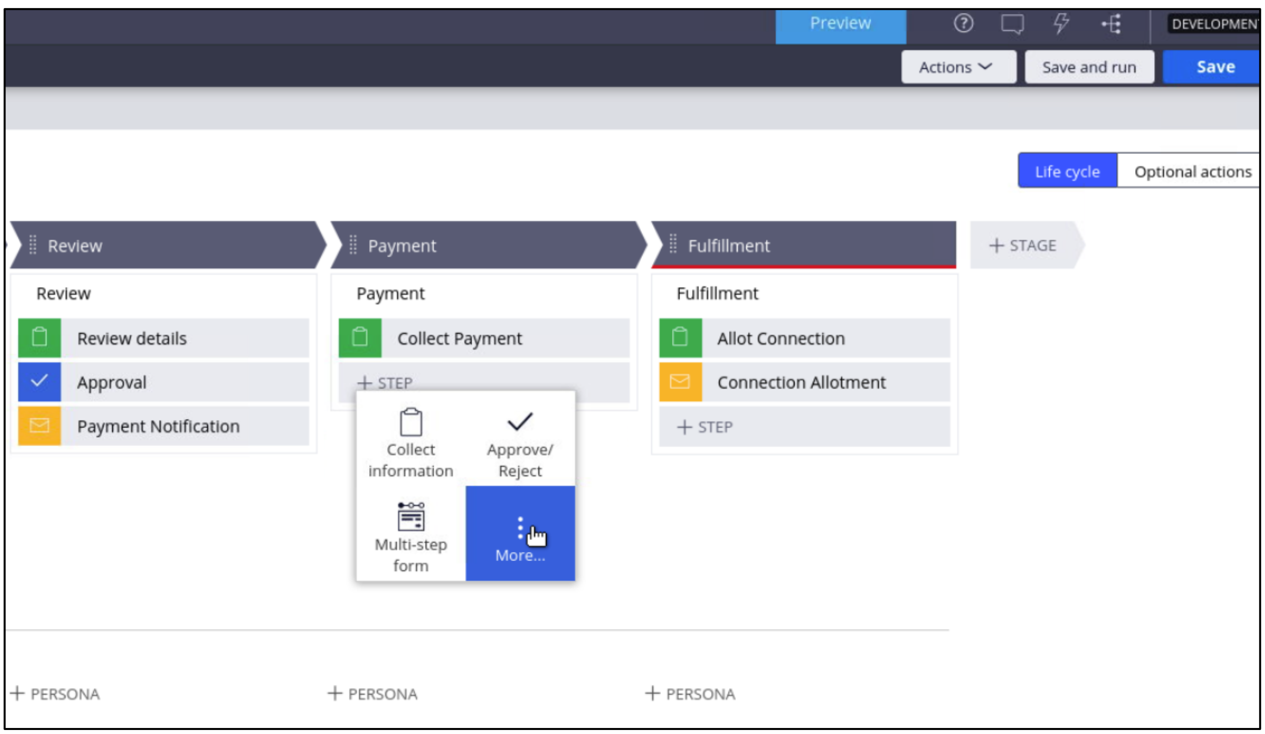


Task 2: Add Send Email Step

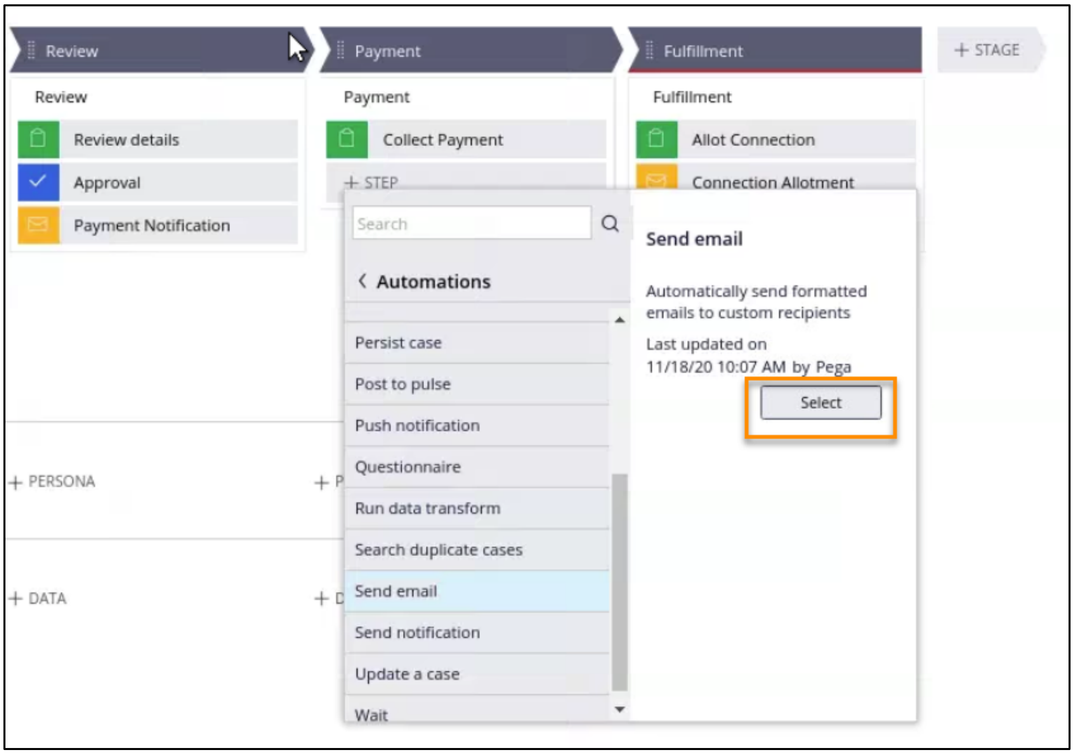
1. Navigate to the life cycle view **Case Types->New Connection**



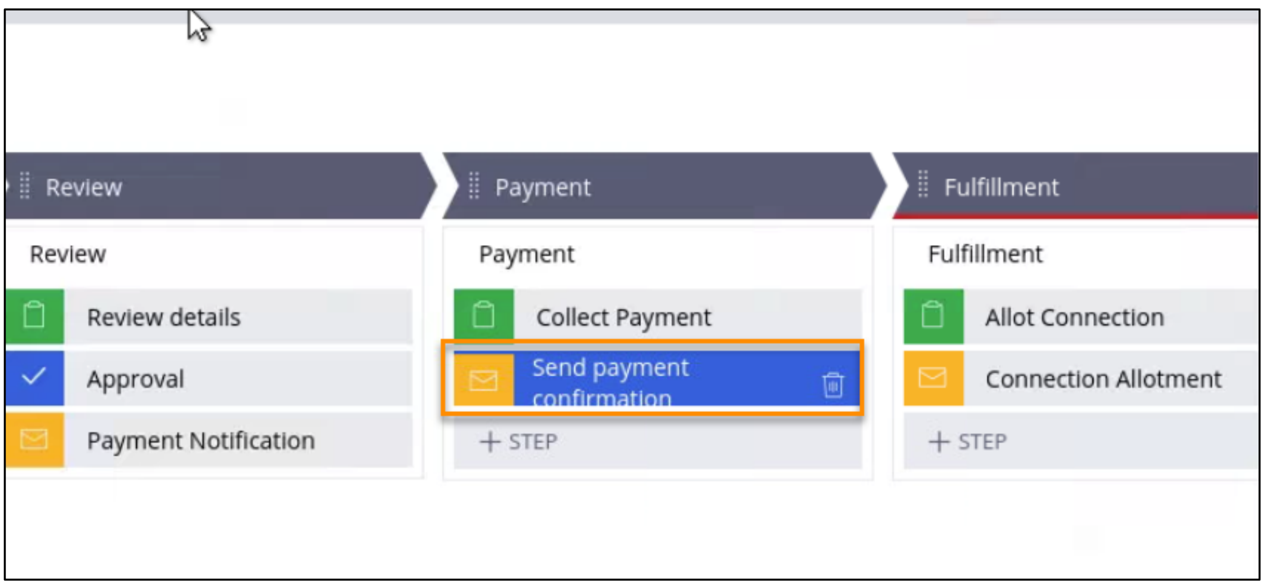
2. In the **Payment** process add a new step



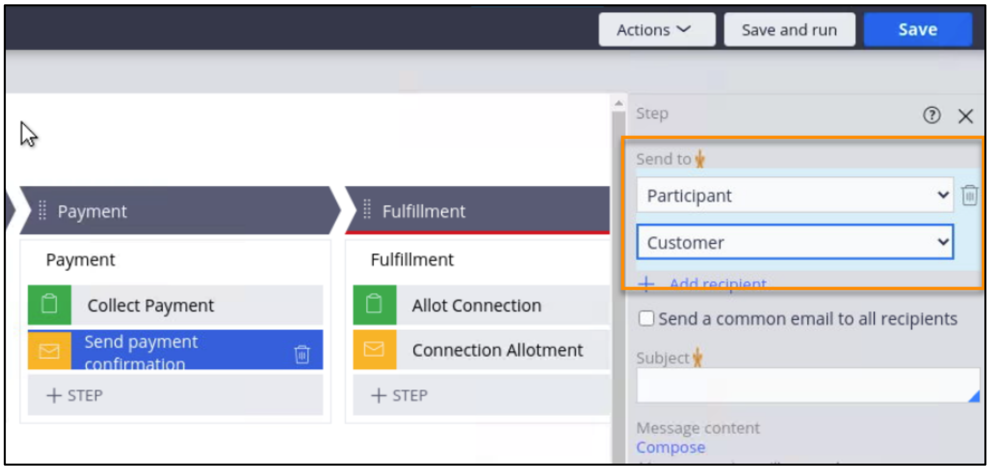
3. Click **+STEP > More > Automations > Send Email > Select**.



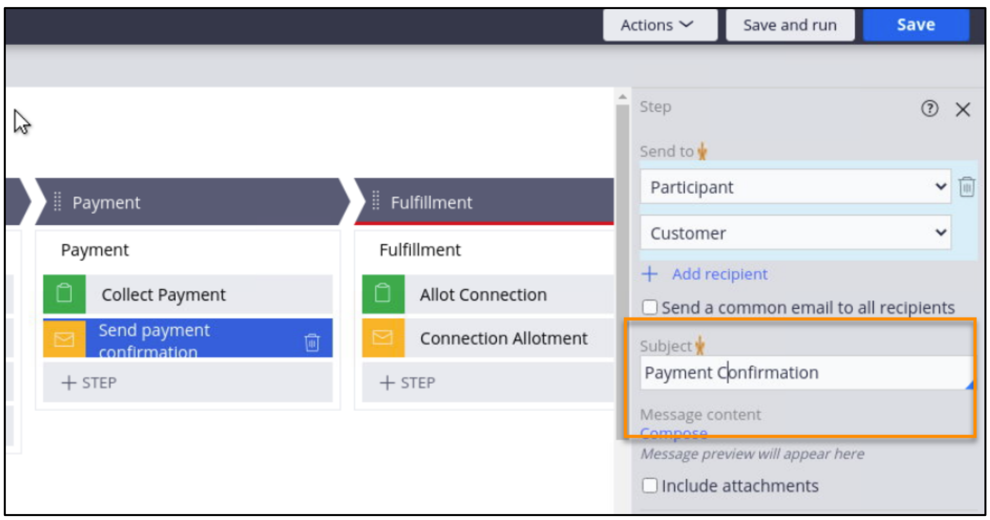
4. Name the send email step Send payment confirmation.



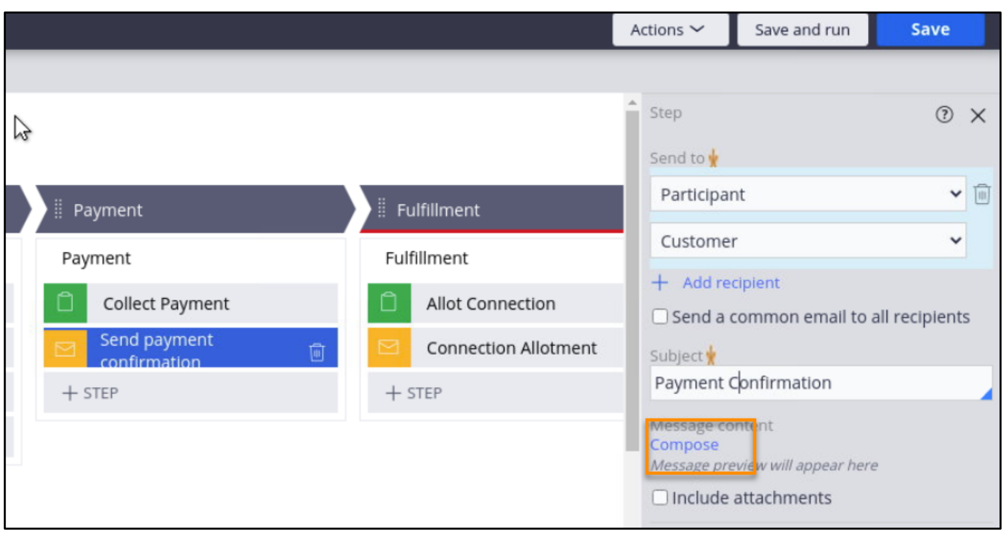
5. In the context menu select **Participant** from the **Send To** drop-down.
6. Select **Customer** from the drop-down below **Send To**.



7. In the **Subject** field enter Payment Confirmation.



8. Click **Compose** to enter the email message

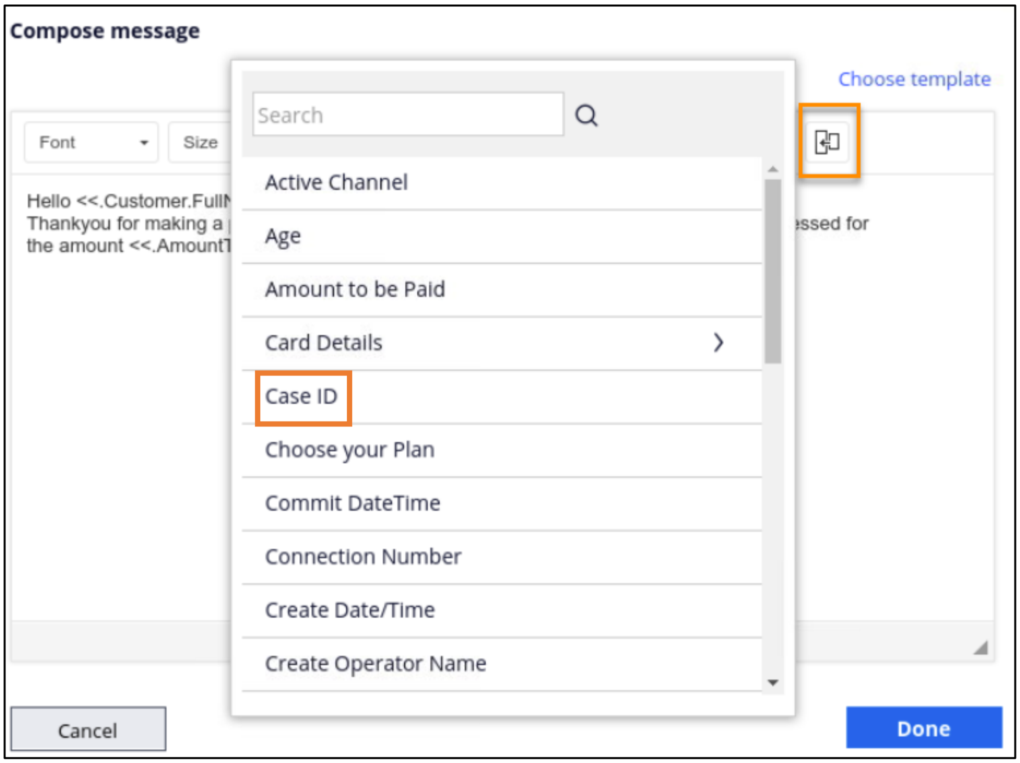


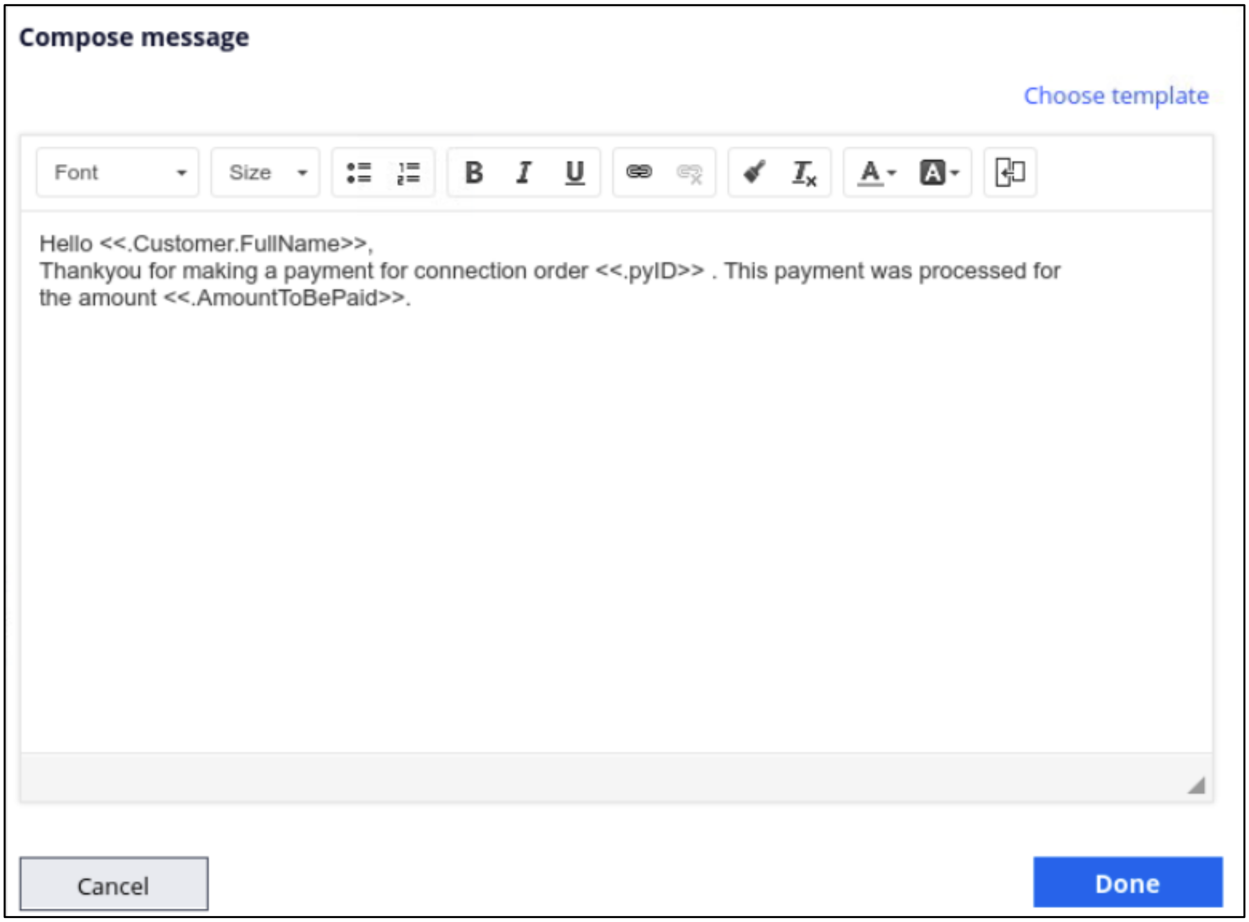
9. In the **text editor** input this for the email message

Hello <<.Customer.FullName>>,

Thank you for making a payment for connection order <<.pyID>>. This payment was processed for the amount <<.AmountToBePaid>>.

NOTE: Use the Insert Property button to add properties such as Case ID (.pyID) to the email message



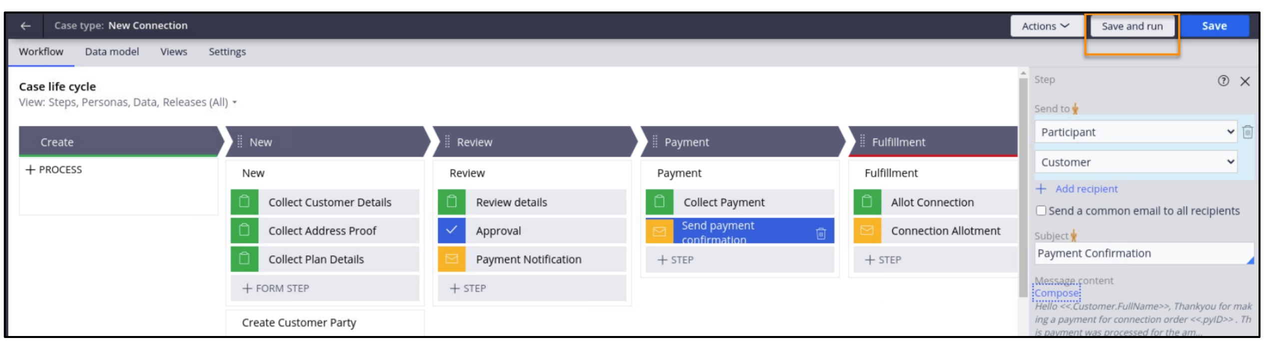


10. Click **Done.**

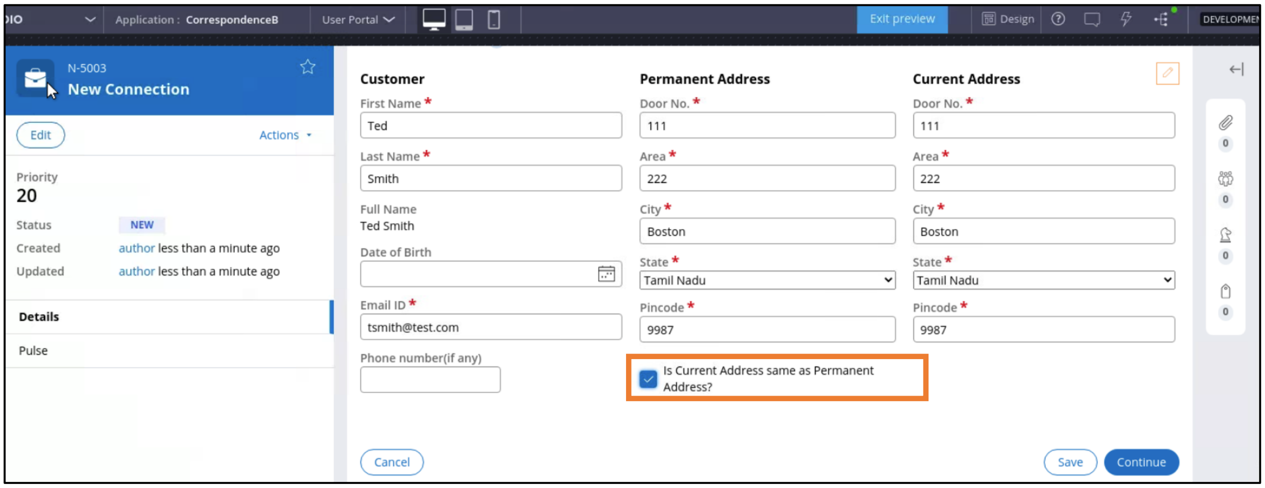
11. **Save** the case type.

Task 3: Verify Your Work

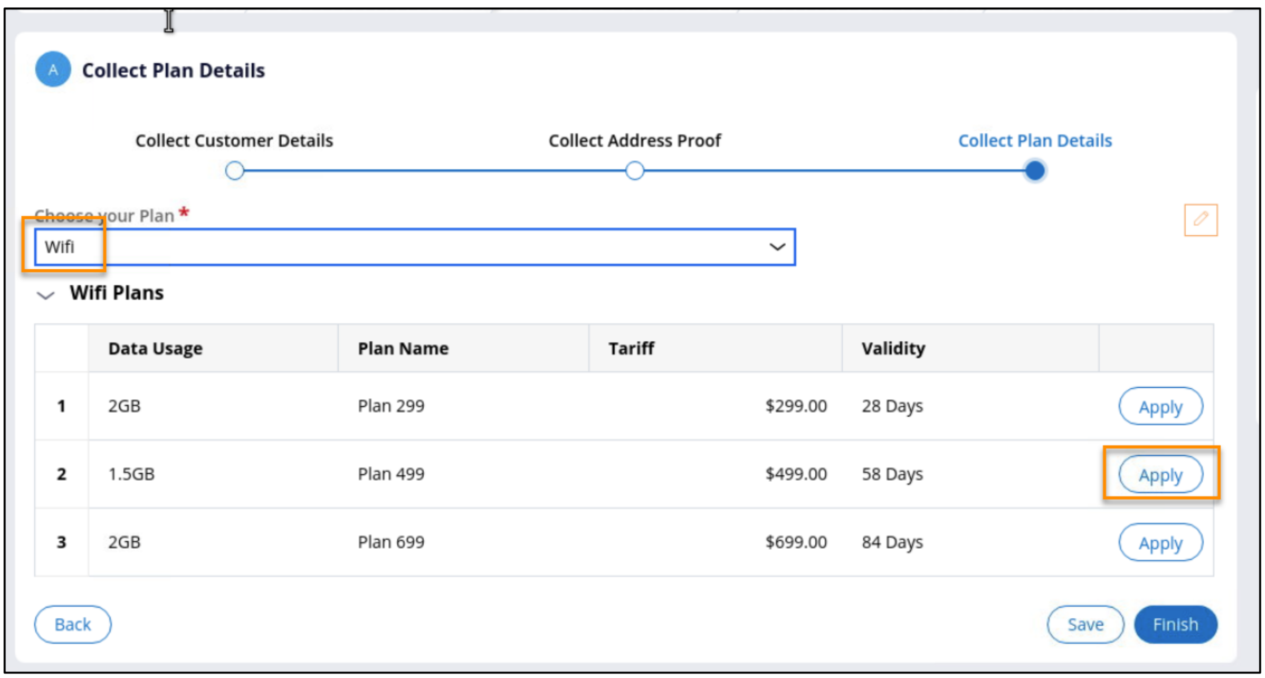
1. Click **Save and run.**



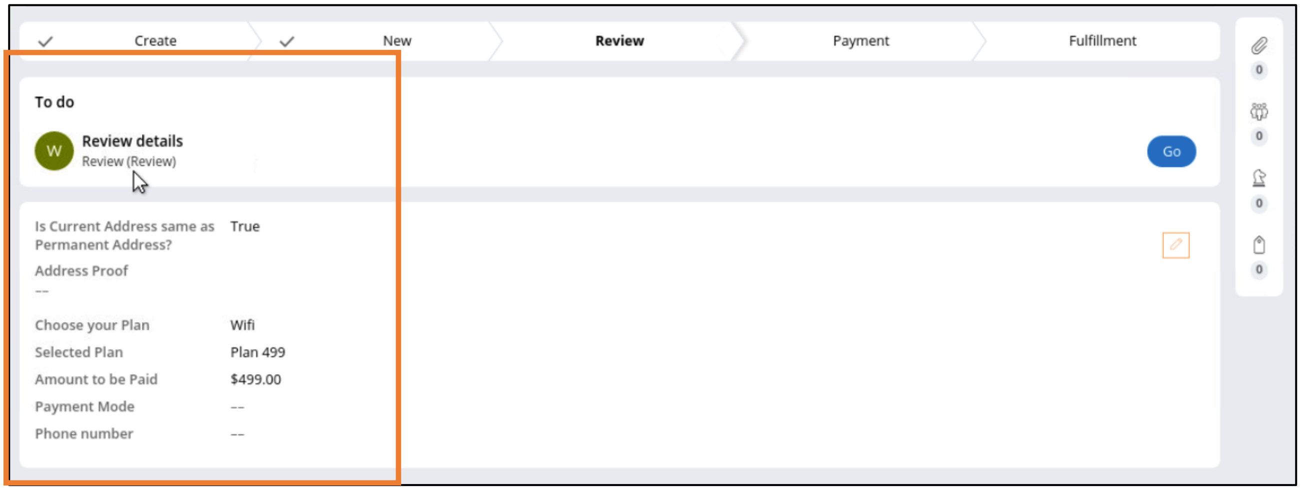
2. Check the Is **Current Address same as Permanent Address** box then click **continue**.



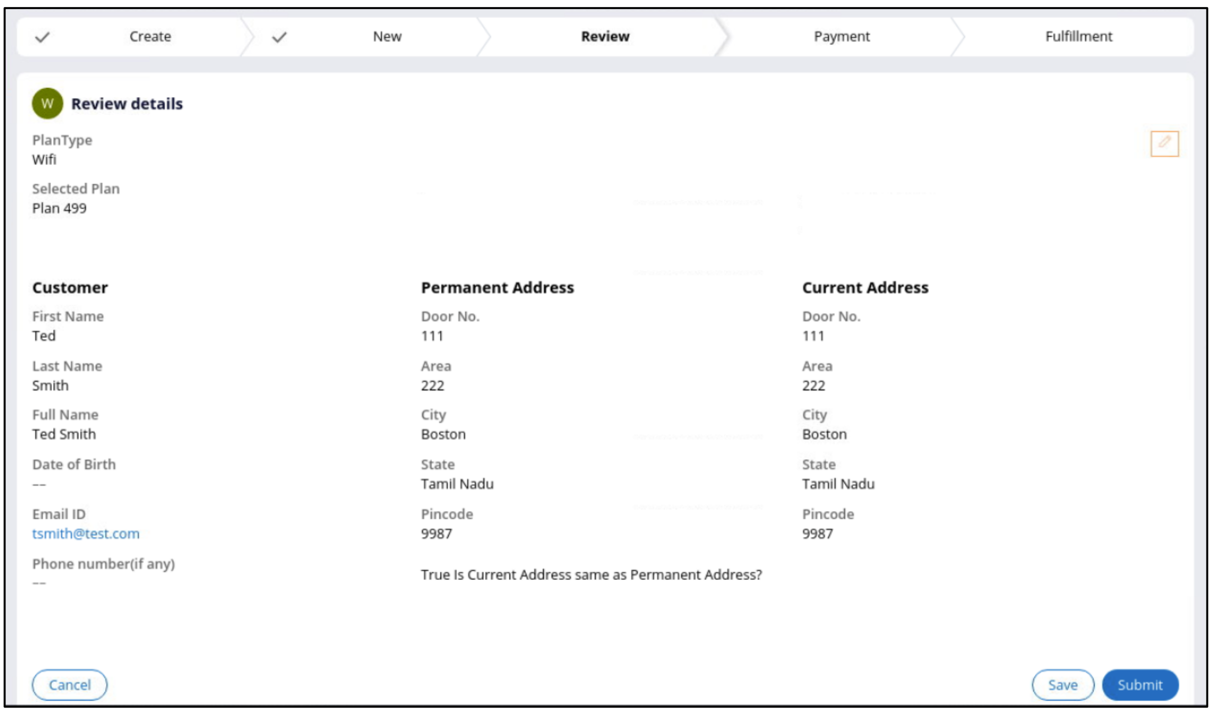
3. Click **Continue.**
4. Select **Wifi** from the **Choose your** plan dropdown.
5. Click Apply for the **Plan Name** “Pan 499”.



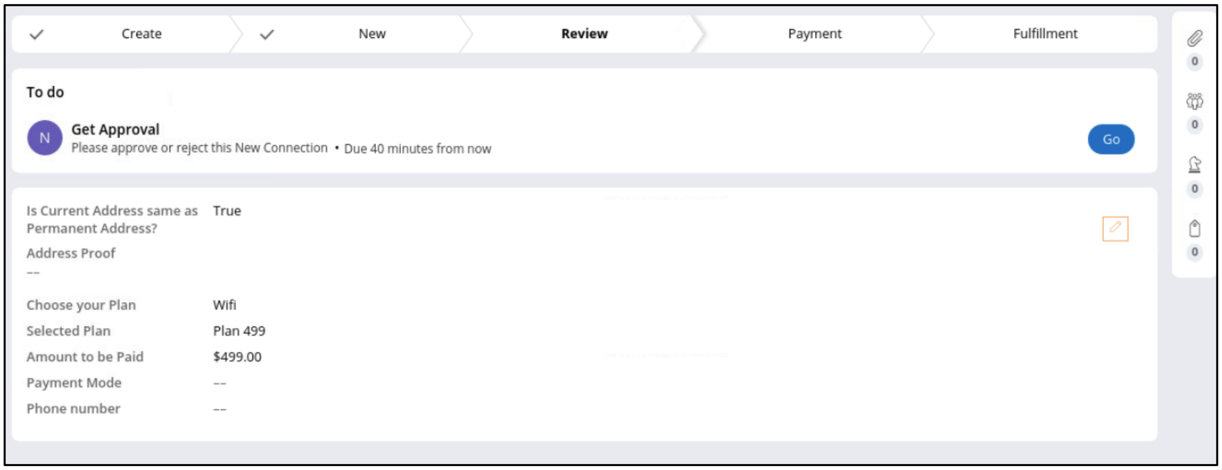
6. Click **Finish.**
7. Click **Go** to open **Review Details**.



8. Click **Submit.**

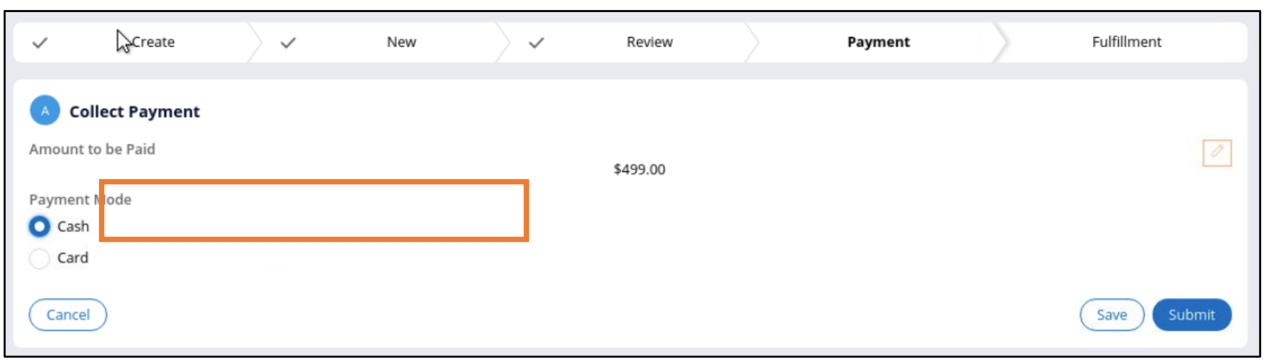


9. Click **Go** to open the **Get Approval** step.

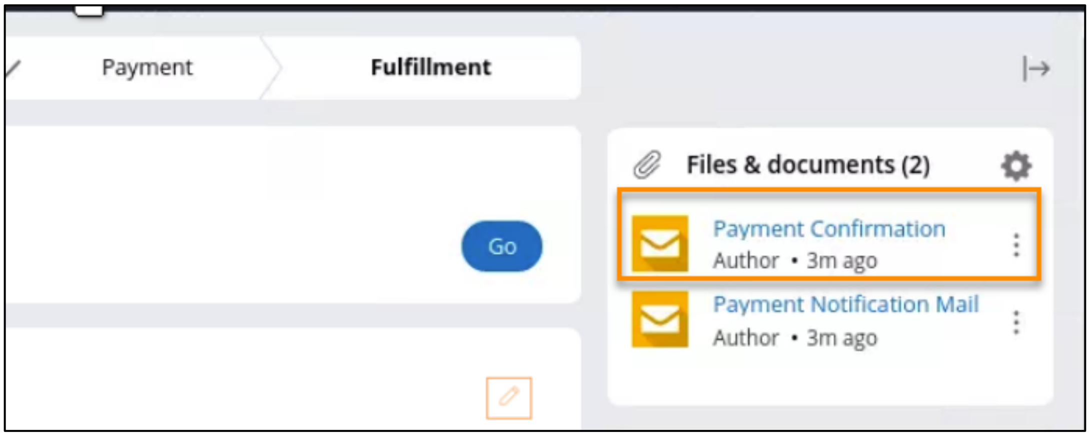


10. Click **Approve.**

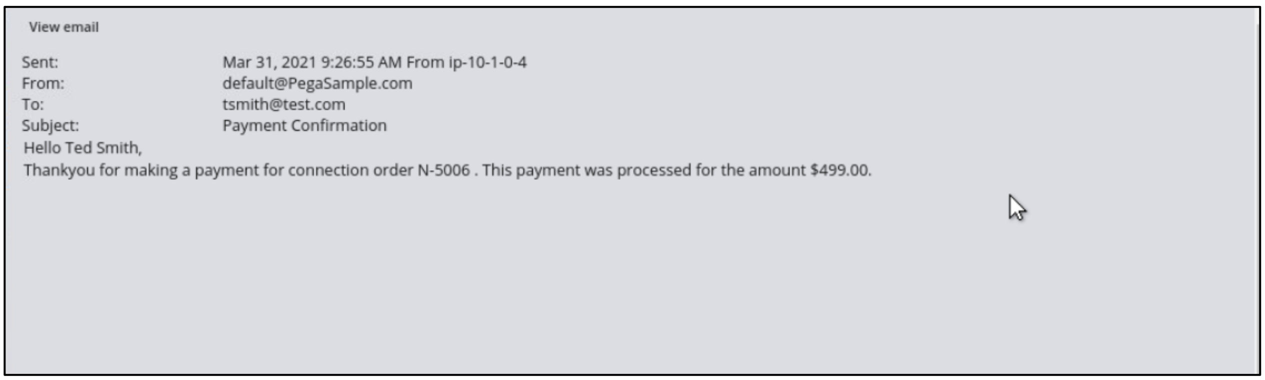
11. Select the **Cash** option and click **Submit.**



12. In the **Actions menu** click **Refresh** to view Files & documents(2)section under the utilities panel, click the **Payment Confirmation** email link to view the generated email



13. The email will display in a pop-up window:



14. **Log off**.

Decision Points

Scenario

Understand how to configure common decision rules for a decision shape and unit test the various configurations.

You will create a new case type and workflow with a decision shape configured to support a Boolean expression, decision table. You will create the following Pega artifacts.

- Case Type [class] : Decision Points
- Stage : Making Decisions
- Process [flow rule] : Decision Flow
- Step(s):
  - Assignment: Decision Input
    - Properties: Desc (text, required) and Range (decimal)
  - Decision Shape:
    - Boolean Expression
    - Decision Table
  - Assignment: Other Input

To create the new case type and workflow you will use both the App and Dev Studio.

Use the following credentials to log in to the exercise system:

Role	Username	Password
HR Administrator	AdminHR@decisionPoints	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Task 2: Create the Case type, workflow, and various configurations for the decision shape

As an operator, create the case type and workflow.

Task 3: Unit test TableChoices.

Task 4: Test the Decision Points – Decision Table

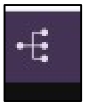
As an operator, test the decision table configuration in the process.

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

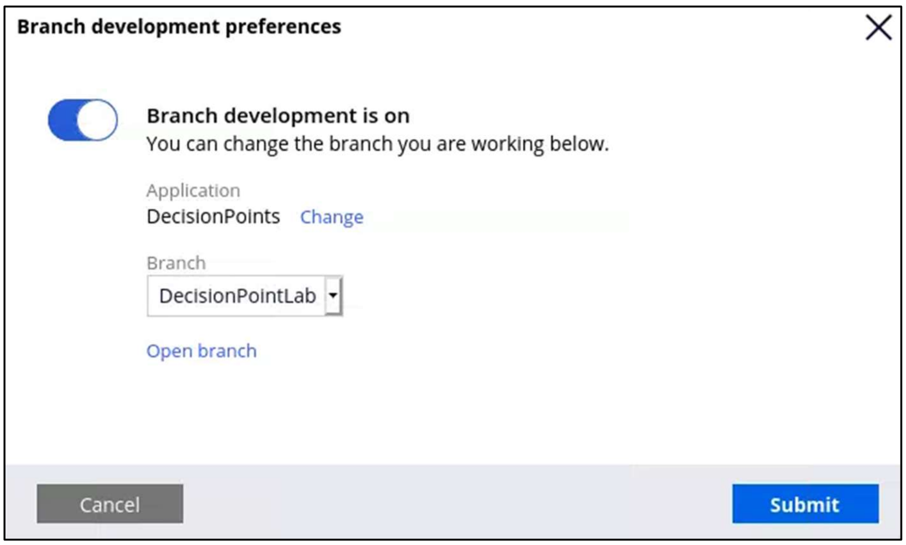
Detailed Steps

Task 1: Log in and enable branch development

1. Log in using the credentials **AdminHR@DecisionPoints** and **rules**.
2. Toggle Branch Development.



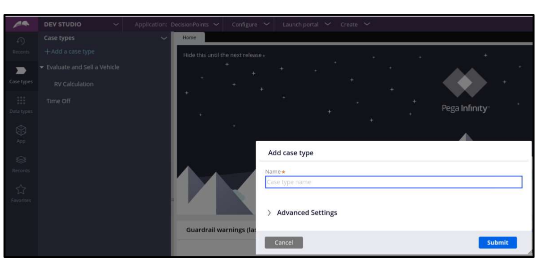
3. Turn on Branch Development. Click **Submit**.



4. Branch Development is active.

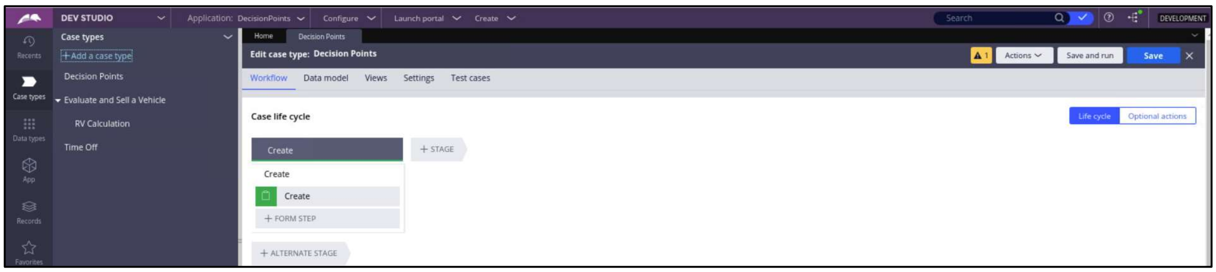
Task 2: Create a case type and workflow with a decision shape to support/test various configurations

1. In the Dev, Studio click on **Case Type** and then click on **+Add a case type link**.

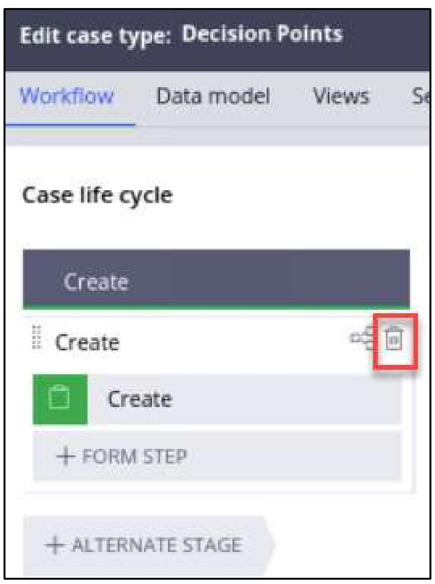


2. Enter **Decision Points.**

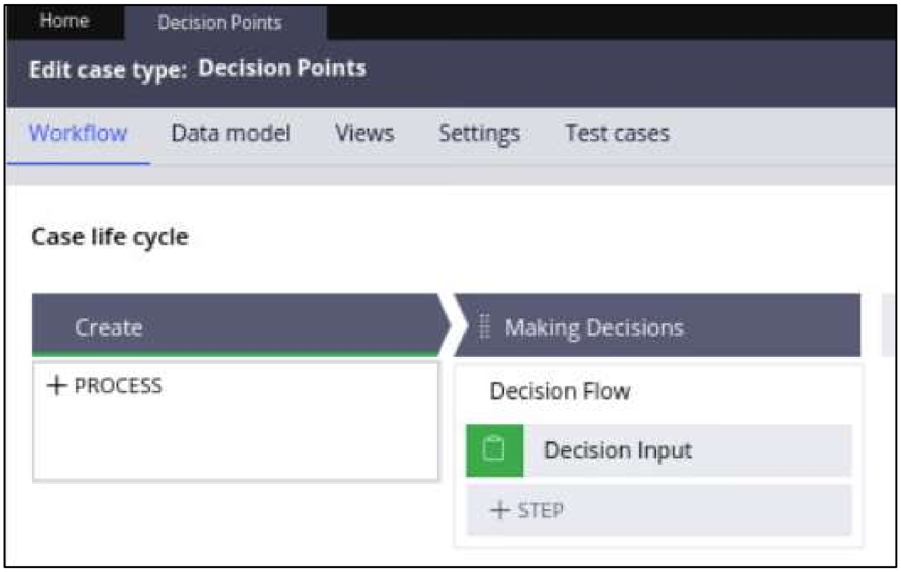
3. Click **Submit.**
4. The case designer displays the Create stage.



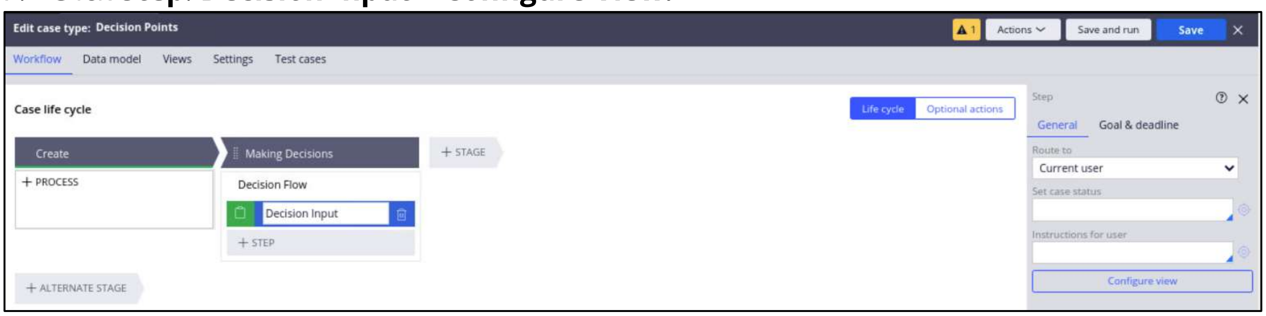
5. Delete the process flow from the **Create** stage by clicking on the delete icon as shown.



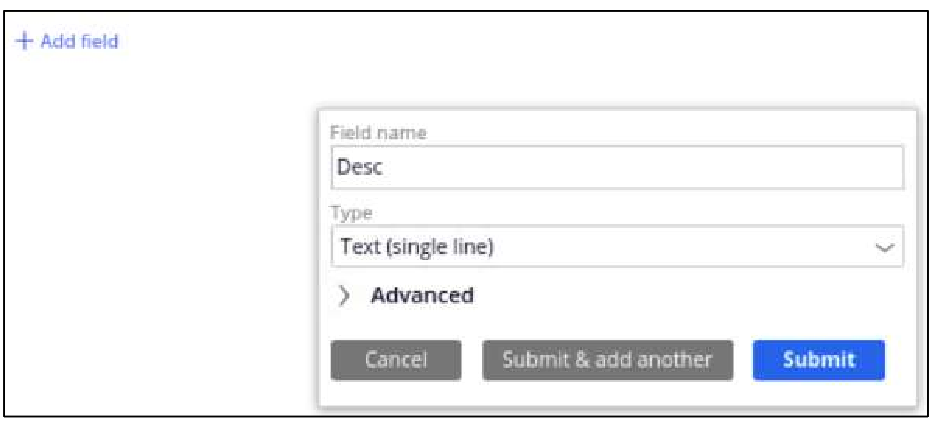
6. Add a stage and enter the information listed below and click **Save**.
    1. Stage: **Making Decisions**
    2. Step > Collect Information: **Decision Input**
    3. Process: **Decision Flow**



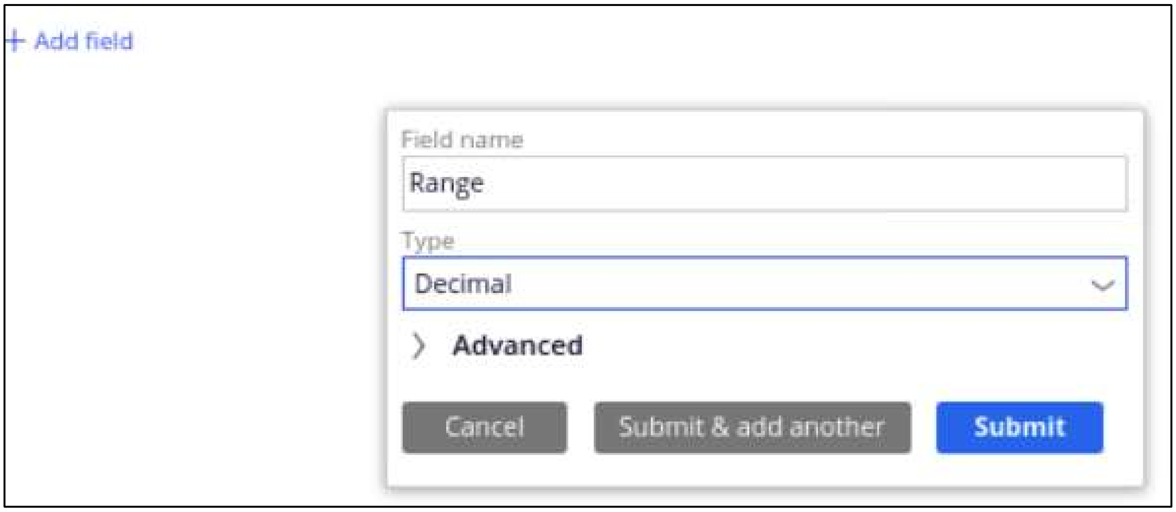
7. Click **Step**: **Decision Input** > **Configure View.**



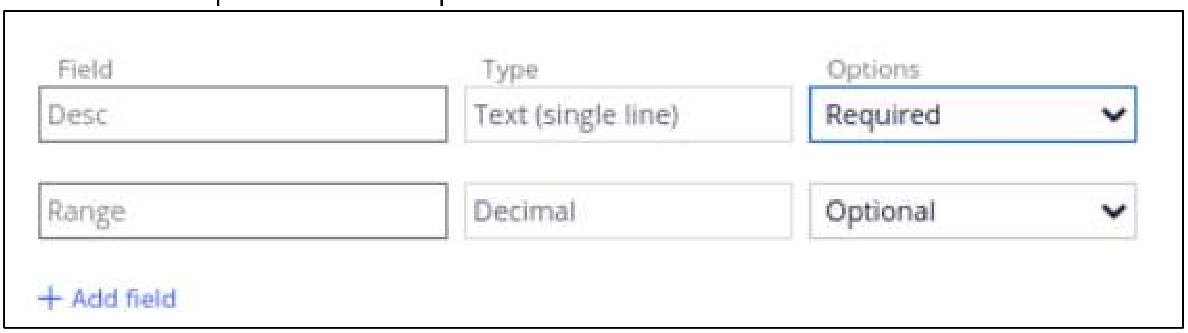
a. Click **+Add field**
b. Enter **Field name**: **Desc** and **Type**: **Text (single line)** and click **Submit**.



c. Repeat steps a and b for **Field name**: **Range** and **Type**: **Decimal.**

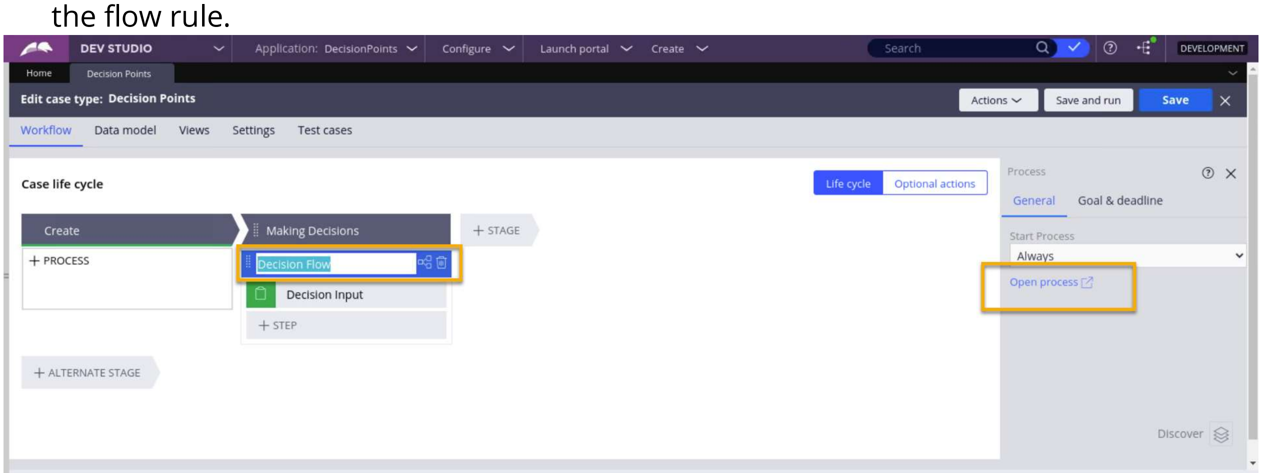


d. Update the field options as below.



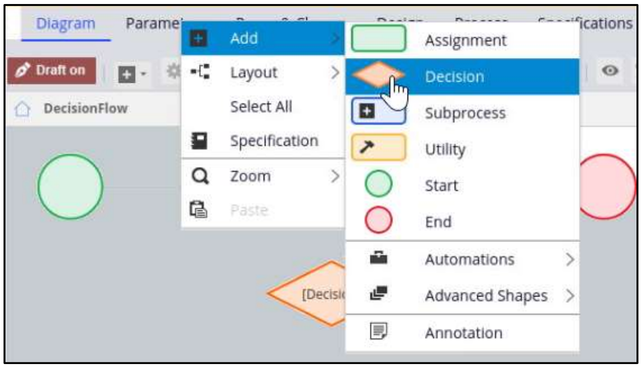
e. Click **Submit** and **Save**.

8. Click Process: **Decision Flow > Open Process**. Follow the instructions below to modify the flow rule.

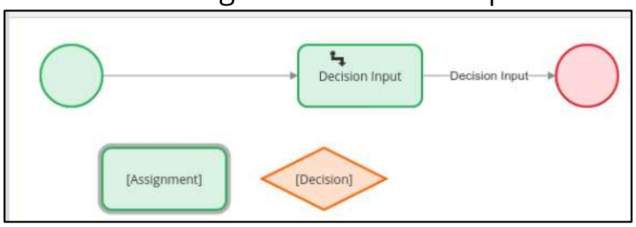


IMPORTANT: Check out the rule.

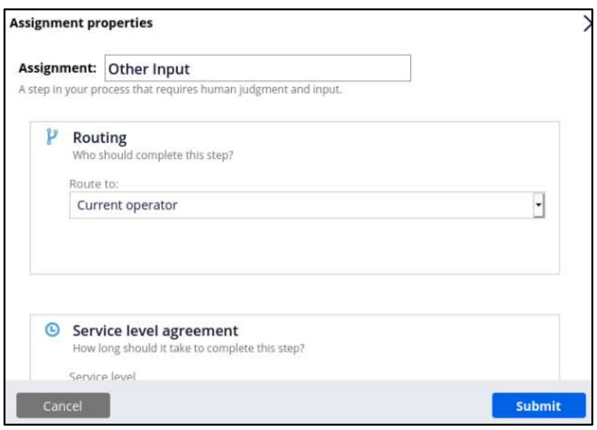
a. Right-click the white space to add a decision shape [Decision]



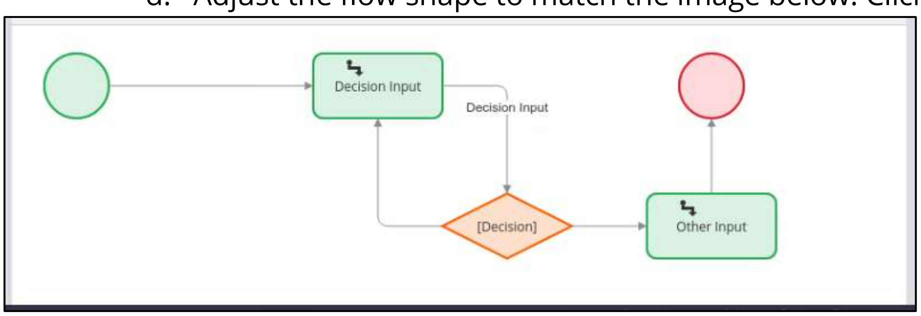
b. Right-click the white space to add an **assignment** shape



c. Right-click the **Assignment** > **View Properties** > Change the Assignment name to **Other Input**. Click **Submit**.

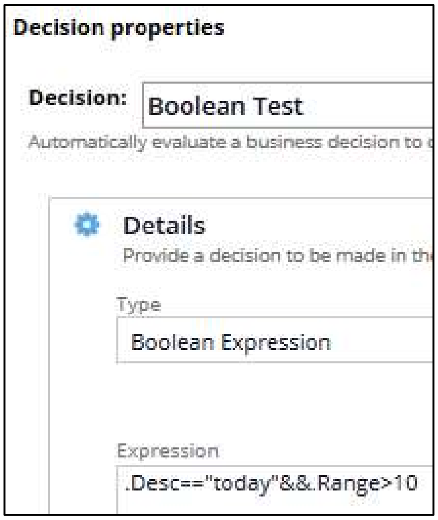


d. Adjust the flow shape to match the image below. Click **Save** to save the rule.



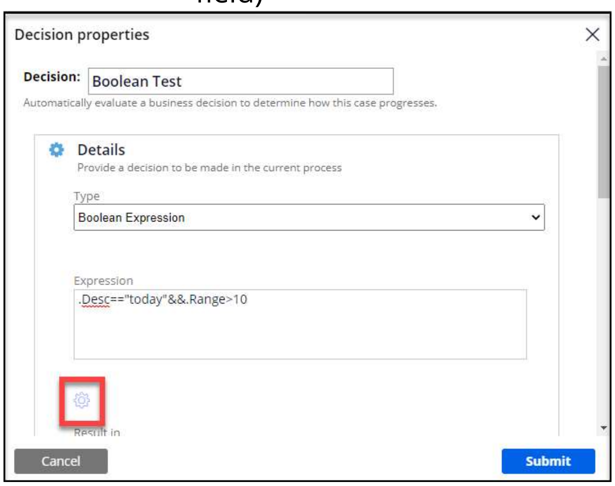
9. Configuring a Boolean Expression:
   a. Select the **Decision shape > Right Click > View Properties**.
      Follow the instructions below to configure the decision shape.
      i. **Decision**: **Boolean Test**
      ii. **Type**: **Boolean Expression**

iii. Expression: **.Desc=="Today"&&.Range>10**



10. Unit test the expression.

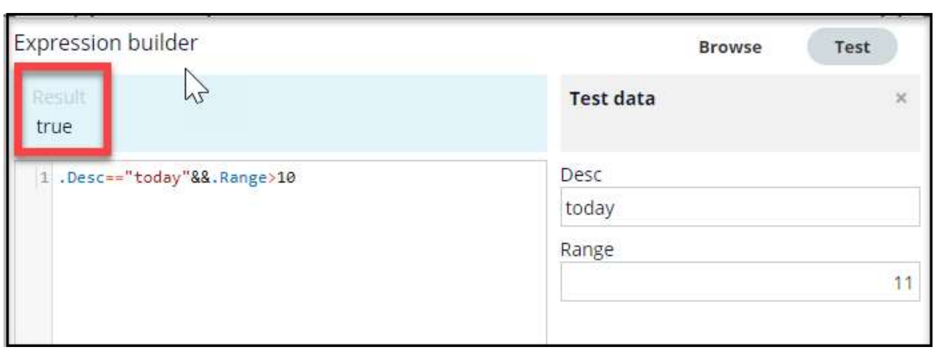
a. Click the **Build an expression**  icon (below the expression input field)



b. Click **Test**.

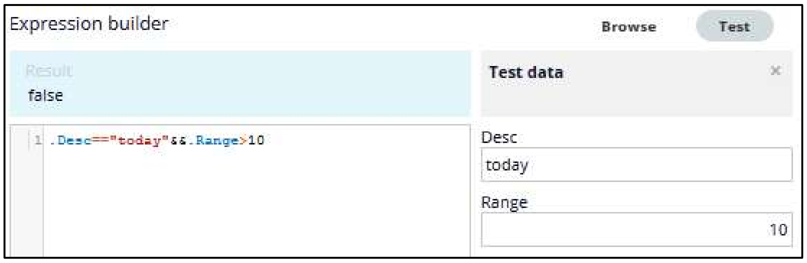
c. Enter **today** in the Desc input box and **11** in the Range input box. Click **Test**.

d. Click **Test** again to see the **Result** (true).

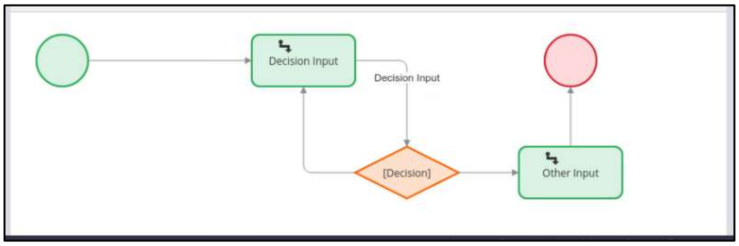


e. Change the Range value from **11** to **10**. Click **Test**.

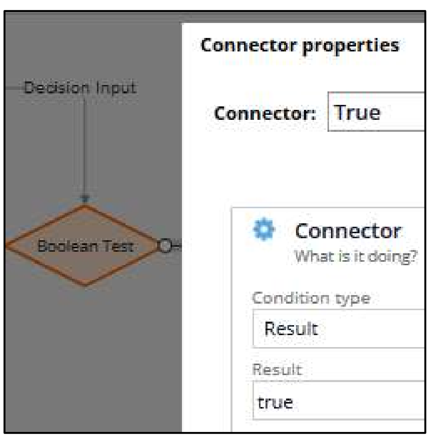
f. Click **Test** again to see the **Result** (false).



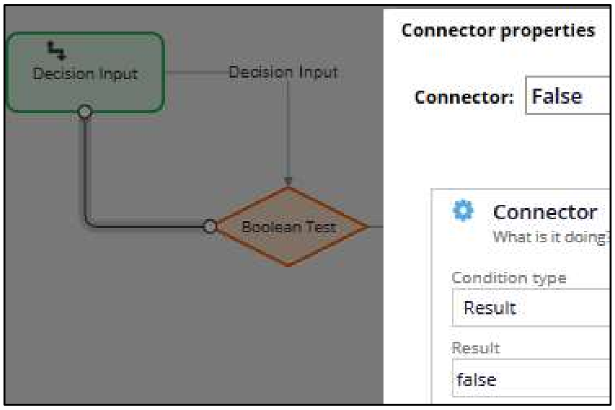
g. Click **Submit** to close the window.
h. Click **Submit** to close the decision properties window.



11. Set the labels for the Decision Shape connector arrows.
   a. Double-click the right connector (the connector going towards the "Other Input" assignment shape) and modify the configuration as given below.
   b. Connector: True
   Condition type: Result
   Result: true
   Click **Submit.**



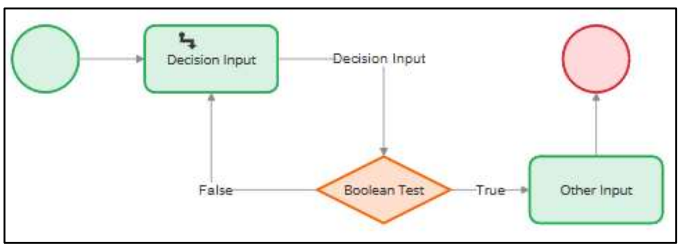
   c. Double Click the left connector (the connector going towards the "Decision Input" assignment shape) and modify the configuration as follows:
   d. Connector: False
   Condition type: **Result**
   Result: **false**



e. Click **Submit**.
f. Find the Draft Off button and click it to turn **Draft on**.
g. Click **Save.**

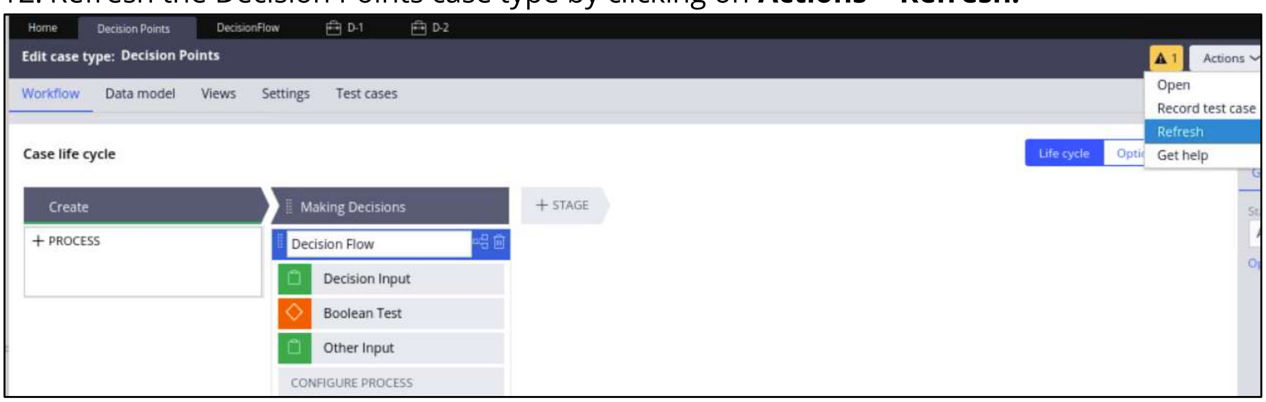
Note: If the flow is not in the **Draft on** mode we will not be able to save the flow rule as we have not configured the flow action from the Other Input assignment.

The flow should look as shown below:

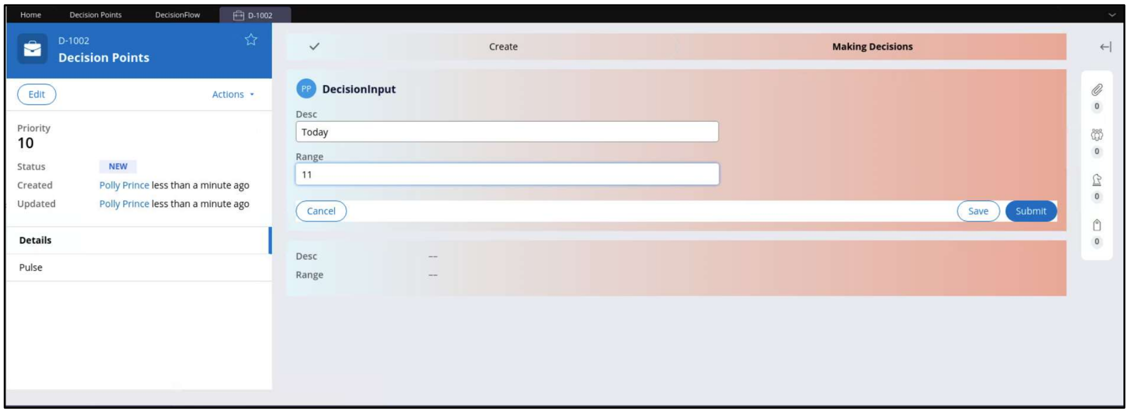


h. Click the **Check in** button, enter the Check-in comments and close.

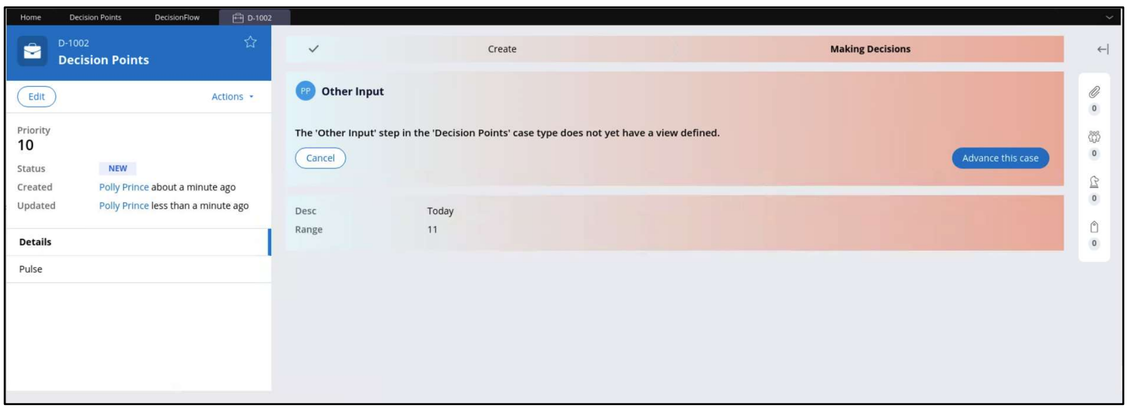
12. Refresh the Decision Points case type by clicking on **Actions** > **Refresh.**



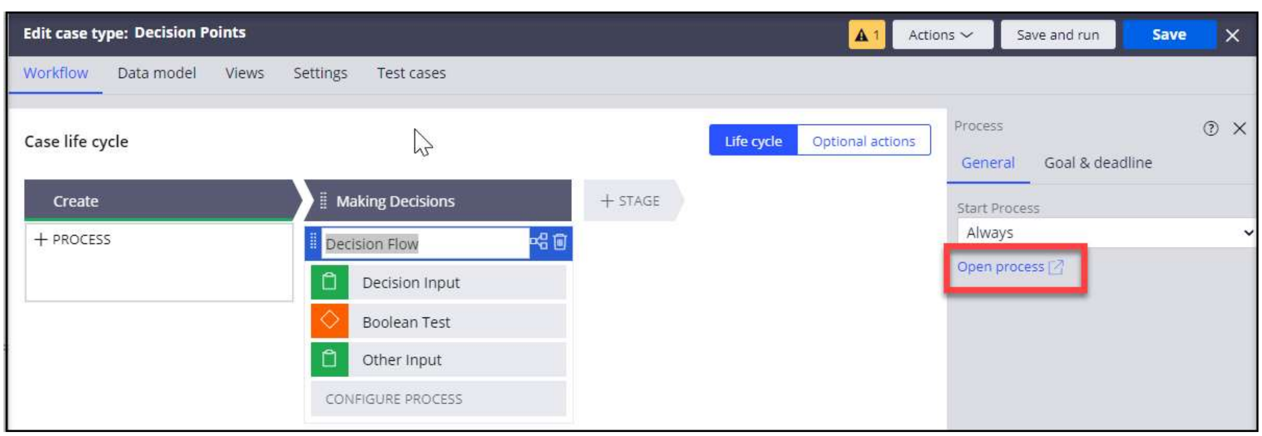
13. Run the case type. Click **Save and run**.
14. Enter **Today** for Desc and **11** for Range. Click **Submit**.



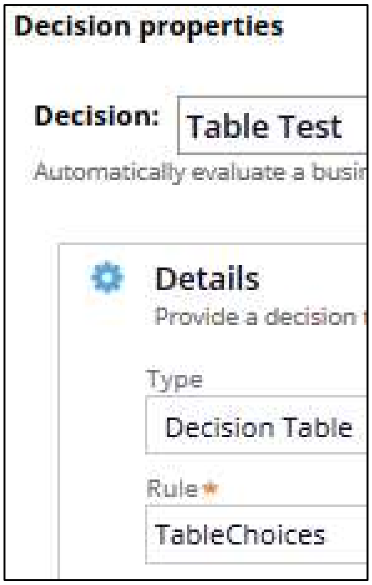
15. The decision evaluates to True and proceeds to the “Other Input” assignment shape. Close the tab.



16. Modify the configuration to a Decision Table.
17. Open the case type and click on **Decision flow** and click **Open Process**.

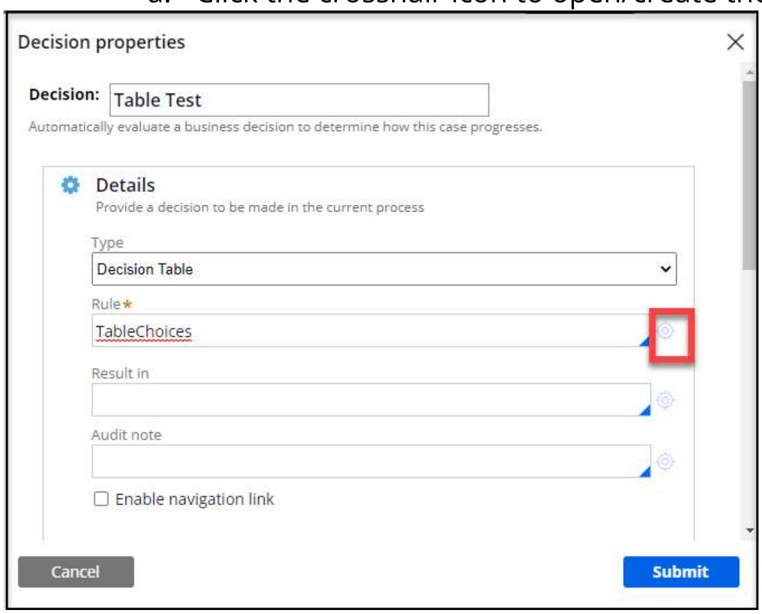


18. **Check out** the flow rule and Select the **Decision shape.** Right-click on the Decision shape and select **View Properties**. Follow the instructions below to configure the decision shape.
    a. **Decision**: **Table Test**
    b. **Type**: **Decision Table**
    c. **Rule**: **TableChoices**

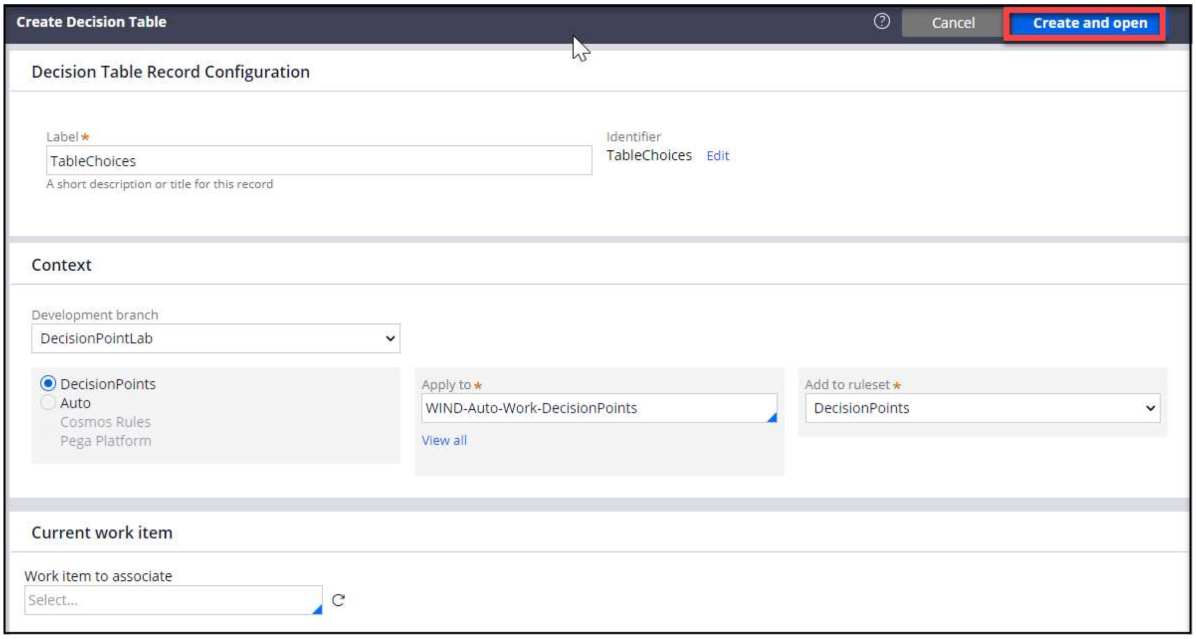


19. Create the decision table rule **TableChoices.**

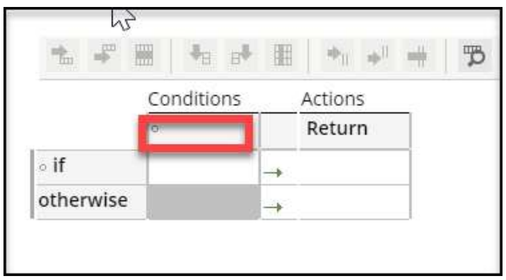
   a. Click the crosshair icon to open/create the **TableChoices** rule.



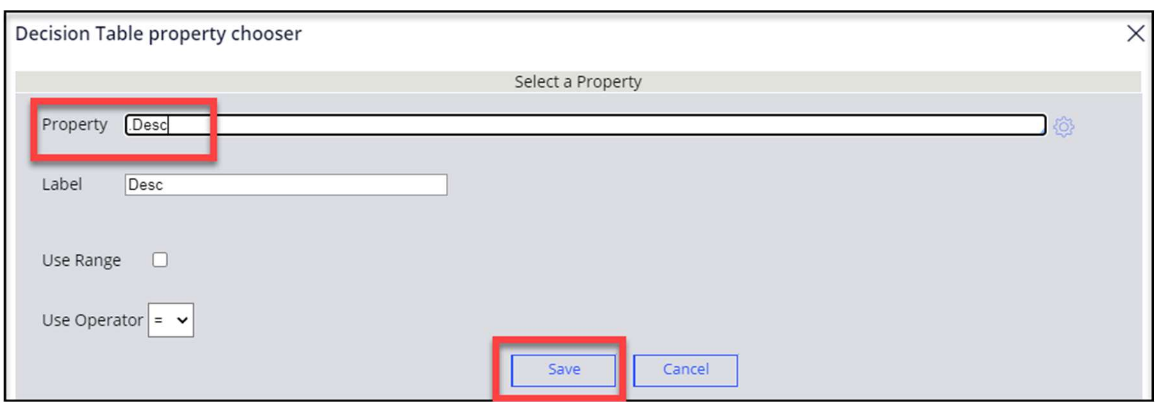
   b. Click **Create and open** to create and open the rule **TableChoices.**



c. Modify the rule to match the image below. Double click the cell below Conditions.



d. In the new window that opens add **.Desc** as the property. Click **Save.**

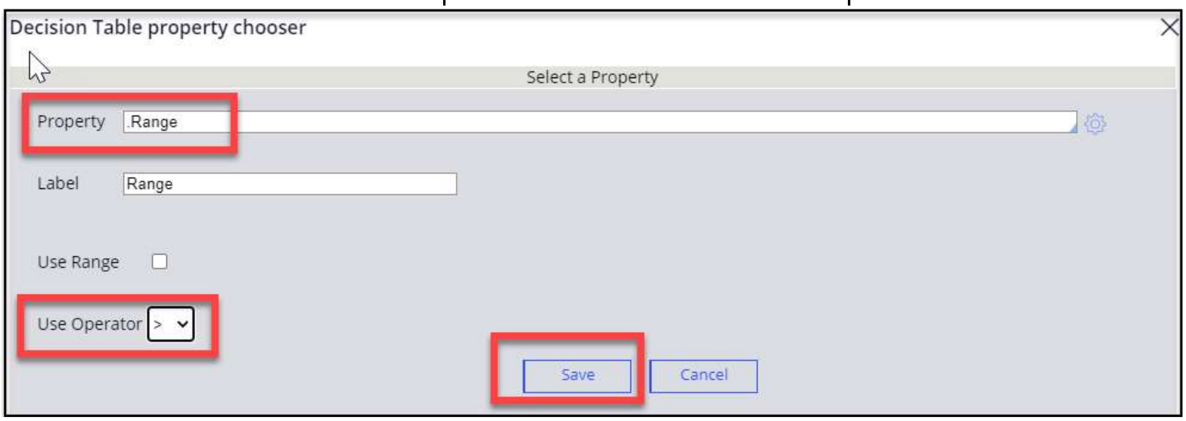


e. Add **Today** in the cell below **Desc**.

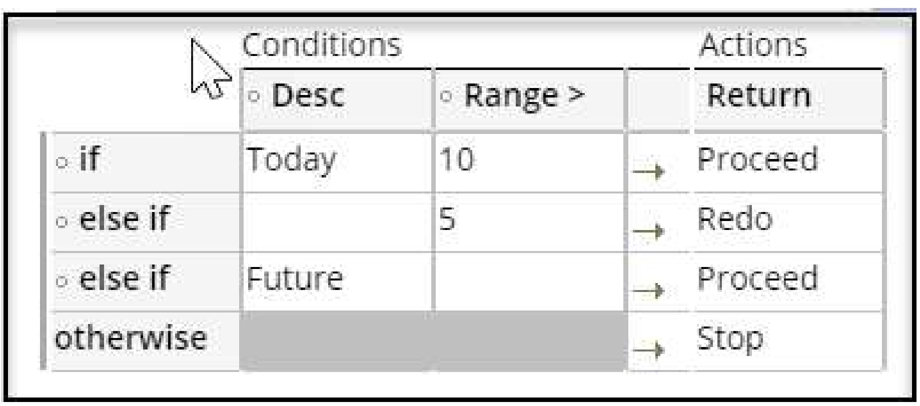
f. Click the **Insert Row After** icon twice.

g. Add **Future** in the bottom cell for Conditions.
h. Click the **Insert Column After** icon.

i. Double-click the cell to the right of Desc and enter **.Range** as the property. For the User Operator **select >** from the drop-down and Click **Save.**



j. Enter **10** and **5** in the two cells under **Range** column as shown below.
k. Enter **Proceed, Redo, Proceed** and **Stop** in the **Actions** column.



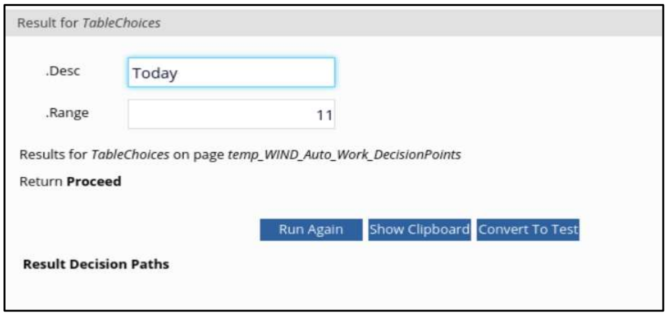
l. Click **Save** to save the rule.

Task 3: Unit test TableChoices.

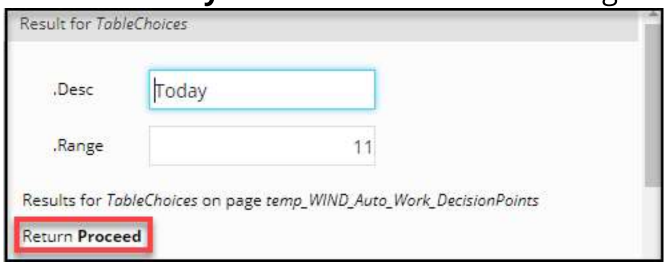
1. Click **Action** > **Run**
2. Test the scenarios below

NOTE: Click **Run Again** after each input and scenario.

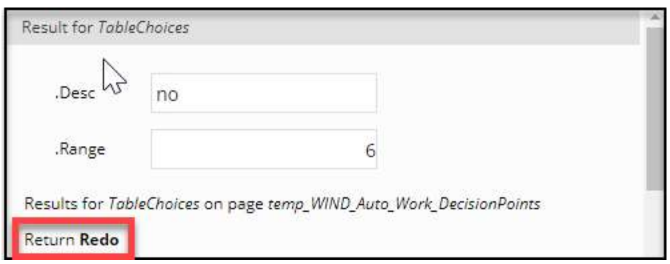
3. Enter the **Desc** and the **Range** values for each scenario as shown below. Observe the **Result** displayed after each run.



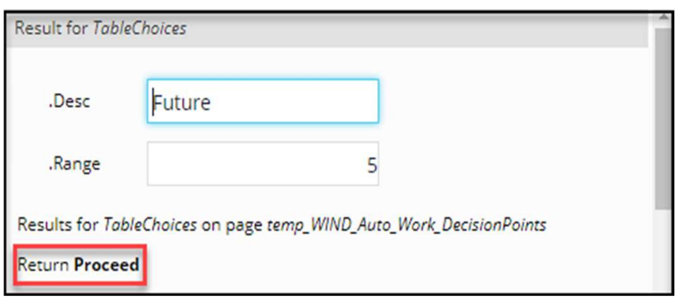
4. Enter **Today** for Desc and **11** for the Range. Click **Run Again**.



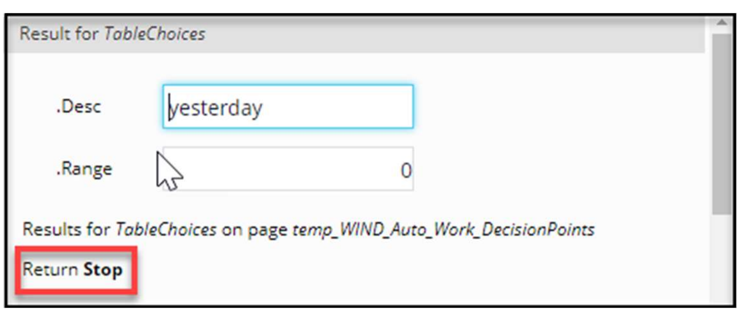
5. Enter **no** for Desc and **6** for the Range. Click **Run Again.**



6. Enter **Future** for Desc and **5** for the Range. Click **Run Again**.



7. Enter **yesterday** for Desc and **0** for Range. Click **Run Again**.

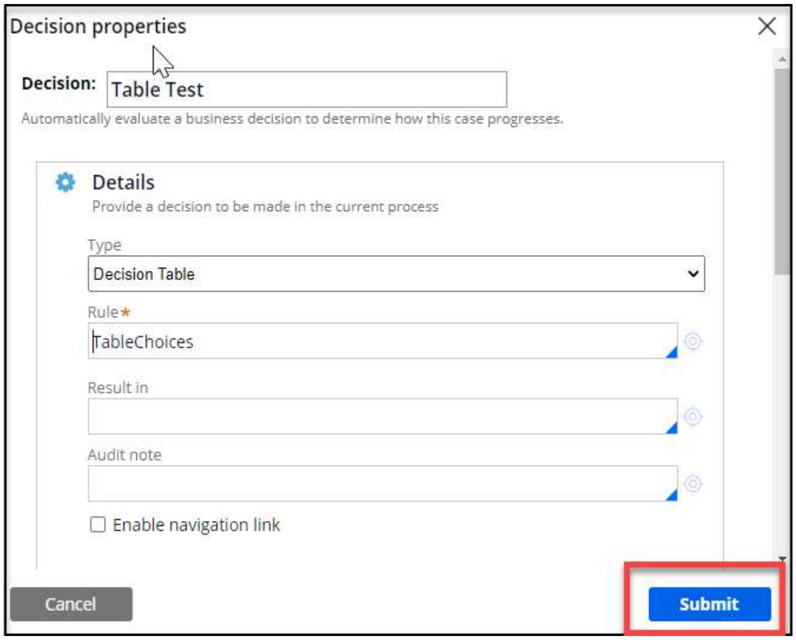


8. Close the test run window.

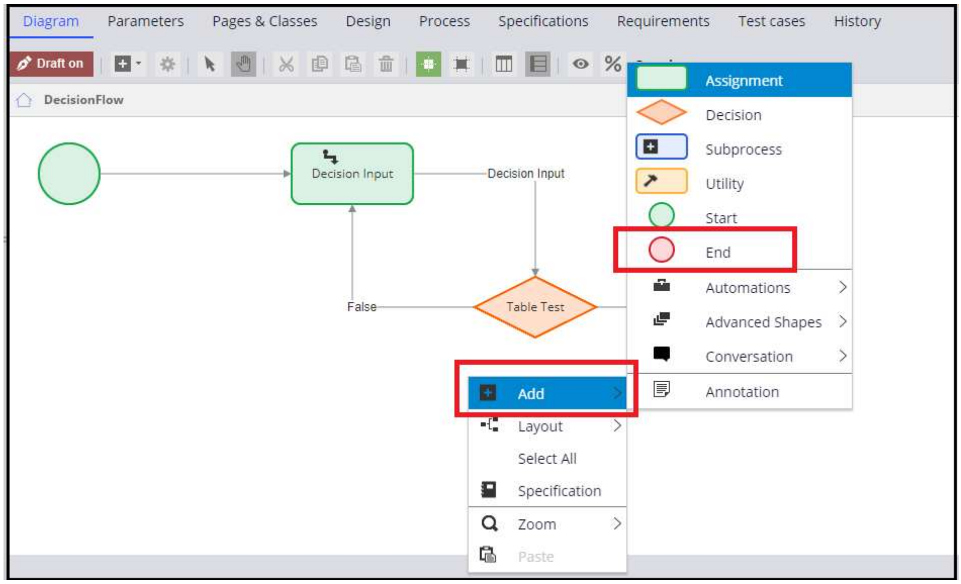
9. Save the **TableChoices** rule and close the window.

NOTE: Check in the rule if required.

10. Click **Submit** on the Decision Properties window.



11. Configure the connectors for the decision shape, decision table (Double click on each connector to modify the configuration)
    a. Double click on the Connector named **True**
        - Change the connector name to Proceed
        - Condition Type: Result
        - Result: Proceed
12. Click **Submit.**
13. Right-click on the white space in the flow rule and click **Add.** Add an **End Shape.**



14. Connect the Decision shape to the End shape. Double click on the connector and configure as follows:

    Connector: **Stop**

    Condition Type: **Result**

    Result: Stop

    Click **Submit.**

15. Double click on the Connector named False and modify as follows:

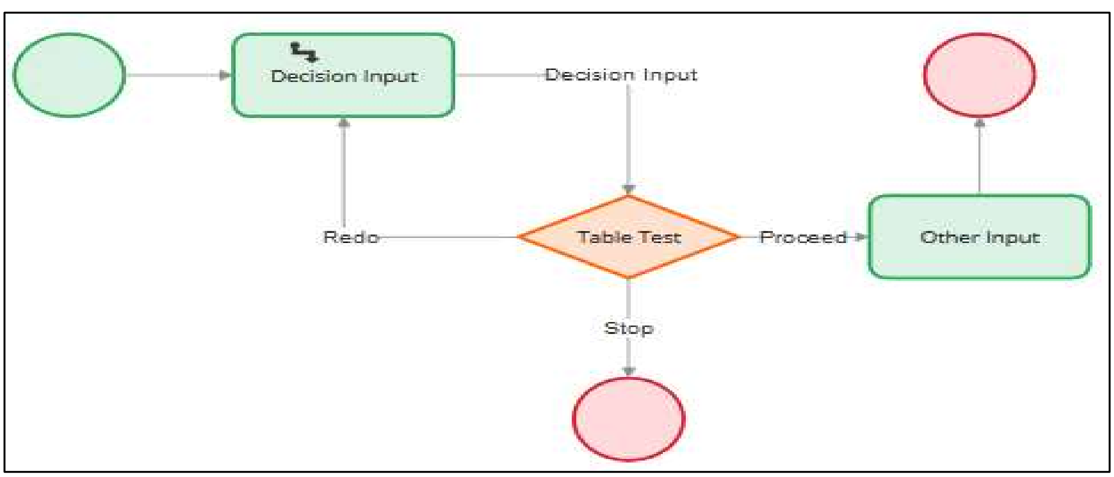
    Connector: Redo

    Condition Type: Result

    Result: Redo

    Click **Submit.**

16. Click **Check in** and enter comments.
17. Click **Save** (to save the flow rule).

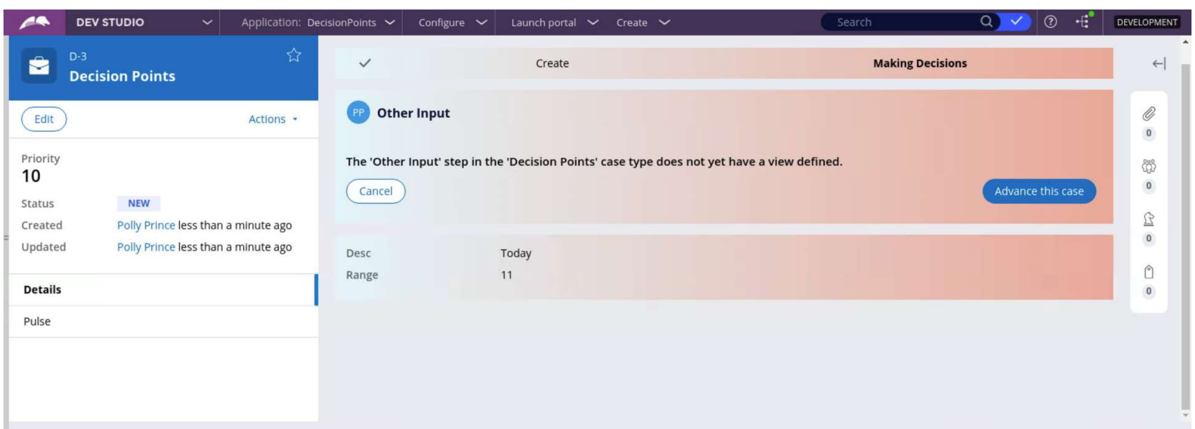


Task 4: Test the Decision Points – Decision Table

Refresh Decision Points case type by clicking on **Actions** > **Refresh**.

1. Test the Decision table in the flow rule.
2. Click **Save and Run** on the case designer.
3. Enter **Today** for **Desc** and **11** for **Range**.
4. Click **Submit.**

5. The decision evaluates to **Proceed** and continues to the assignment shape, **Other Input**.



6. Close the Case instance window.
7. Close the Decision Flow rule.
8. Close all windows.
9. **Log Off**.

User Interface

User Interface Introduction

Scenario

The stages and steps for the Home Loan case life cycle are configured, Wind stakeholders have determined the information that is necessary to add to certain steps. Configure the views for those steps with fields that gather and display the information.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	Iggy@IntroUI	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in

Log in to the system.

Task 2: Add Editable Fields to the view:

Create and add Fields to the Collect Customer Details Step.

Task 3: Verify your work

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Log in

1. Log in using the username **Iggy@IntroUI** and the password of **rules**.

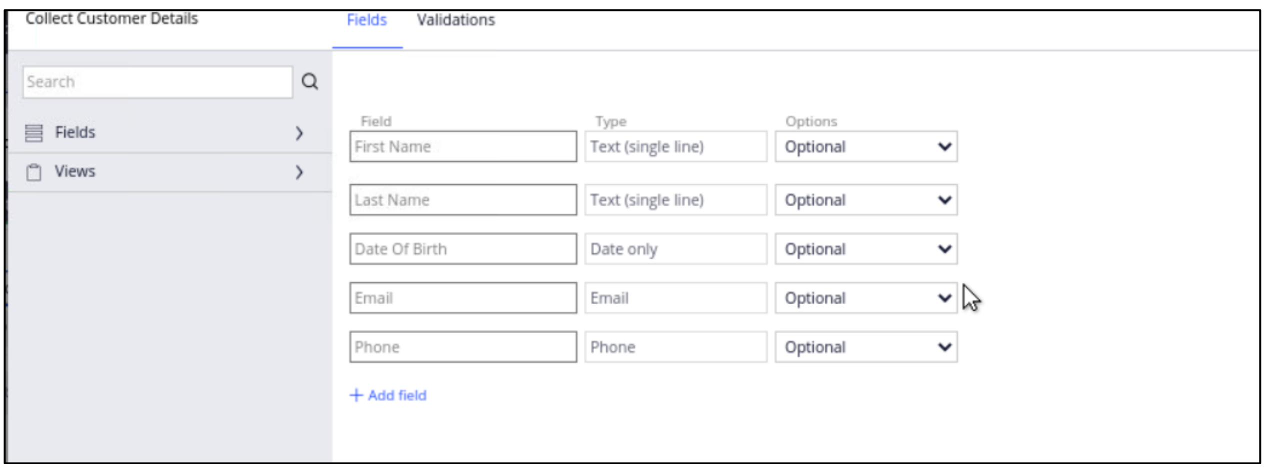
NOTE: This lab does not use branch development.

Task 2: Add Editable Fields to the View

1. In the **Dev Studio** navigation panel, click **Case types > Home Loan** to display the Home Loan case life cycle.
2. In the Home Loan case type, click the Collect Customer Details step to open the contextual property panel on the right.
3. In the contextual property panel, click Configure view to add fields to the view.

4. Add fields by using the information from the table below.

Field Name	Field Type	Editable or Read-only
First Name	Text (Single line)	Optional
Last Name	Text (Single line)	Optional
Date of Birth	Date only	Optional
Email	Email	Optional
Phone	Phone	Optional

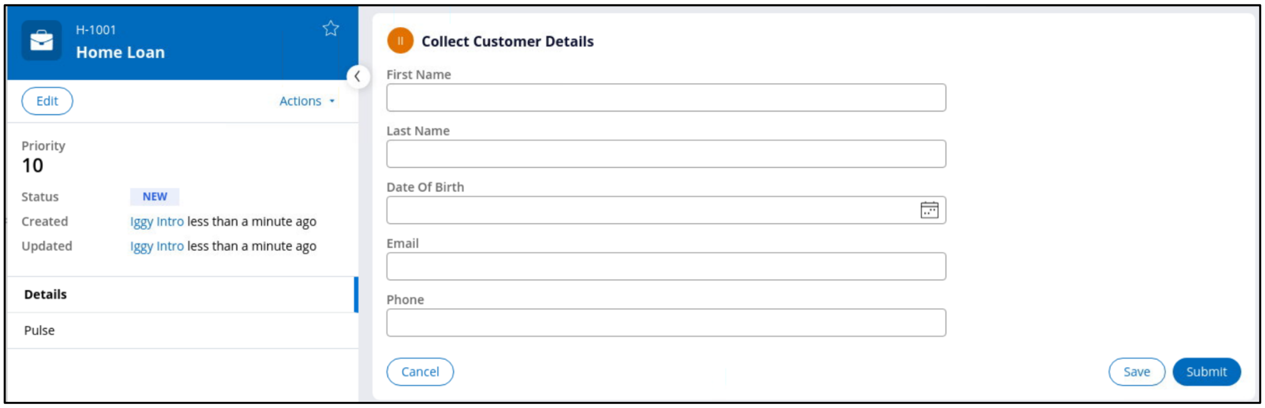


5. Click **Submit**.

6. Click **Save**.

Task 3: Verify your Work

1. In the upper right, click **Save and run** to create a new Home Loan.


H-1001
Home Loan
Edit
Actions
Priority
10
Status
NEW
Created
Iggy Intro less than a minute ago
Updated
Iggy Intro less than a minute ago
Details
Pulse
Collect Customer Details
First Name
Last Name
Date Of Birth
Email
Phone
Cancel
Save
Submit

2. **Log off**.

Customizing a View

Scenario

Stakeholders want the Customer Details view to be streamlined to display the relevant information only. Create a reusable section in an existing data class for Owner Details.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	John_UI@UserInterface	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development
Enable branch development to allow modification and creation of cases.

Task 2: Create the Customer details view
Creating and adding a reusable section from a data type.

Task 3: Verify your work
Refresh to see your changes.

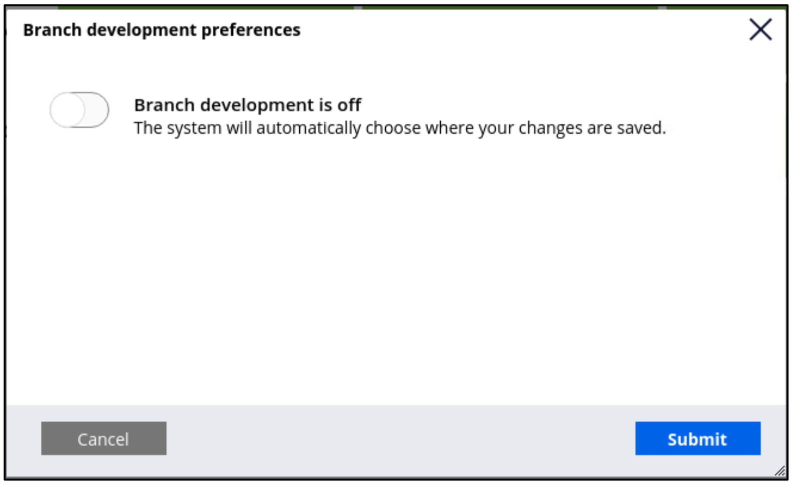
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

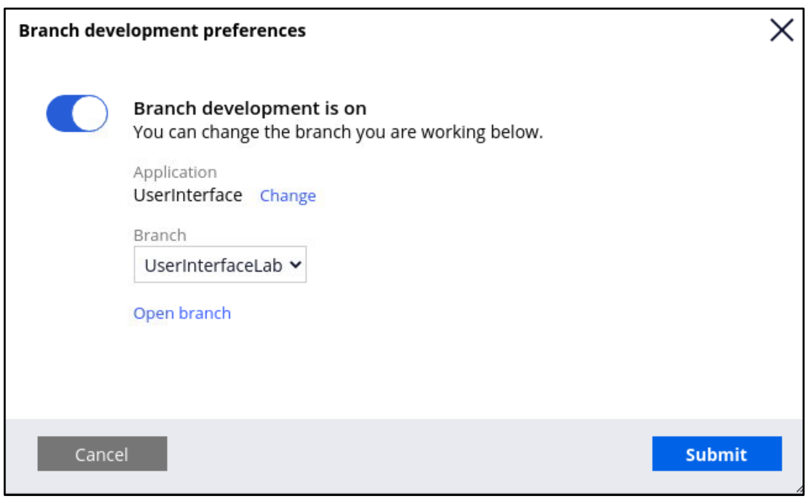
Task 1: Login and enable branch development

1. Log on with the User ID, **John_UI@UserInterface**, and the password, **rules.**
2. From the title bar, click the **Toggle branch development** button.

3. The following appears:

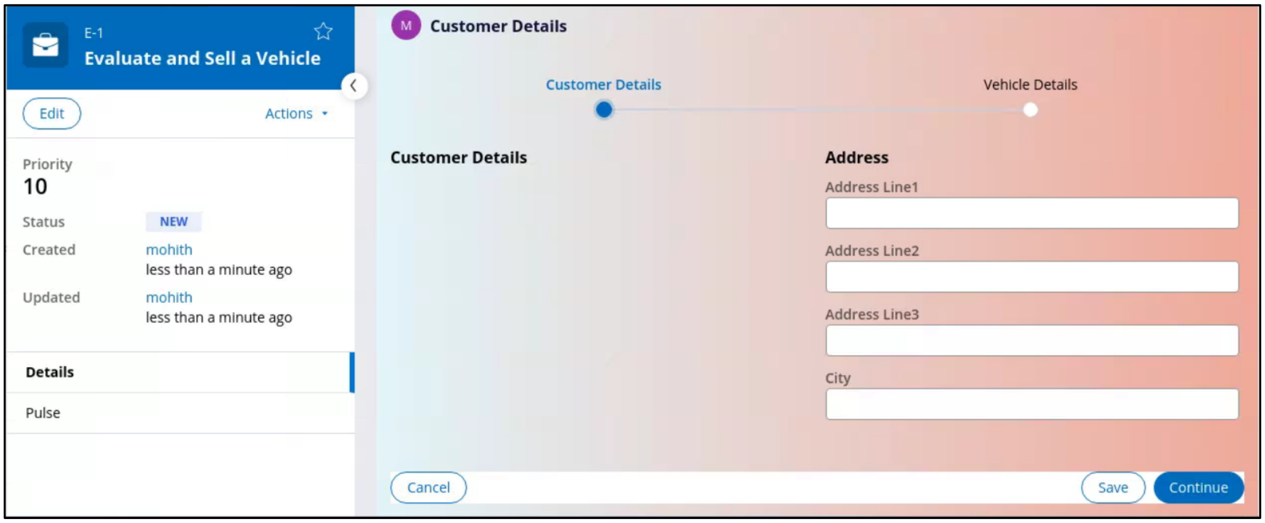


4. Move the slider to turn branch development on. From the Branch dropdown, ensure that **UserInterfaceLab** is selected and click Submit.

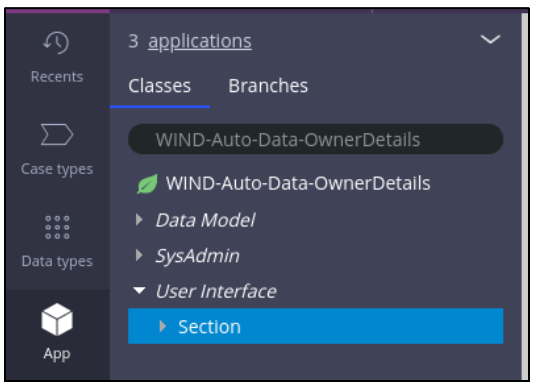


Task 2: Create the Customer details View

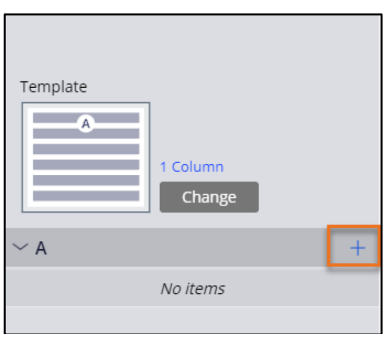
1. In the Navigation pane of Dev Studio, Click **Case types**, and then click the **Evaluate and sell a Vehicle** case type.
2. Click **Save and Run**.



3. From the navigation pane, click **App** to open the App Explorer.
4. In the search field, enter or select **WIND-Auto-Data-OwnerDetails** and press the Enter key. The rules within the specified class are displayed.
5. Expand **User Interface > Section.**

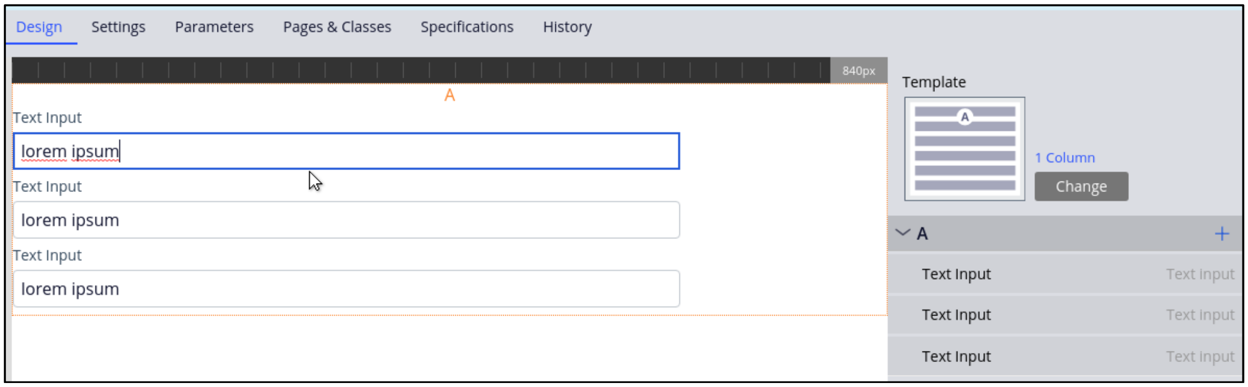


6. Right-click **Section**, and then click **Create**. The Create Section form is displayed.
7. In the **Label** field, enter Customer Details to name the section.
8. Click **Create and open** to create the section. The **Customer Details** section is displayed.
9. In the right pane, click **Add** to add a control. A dialog box is displayed.

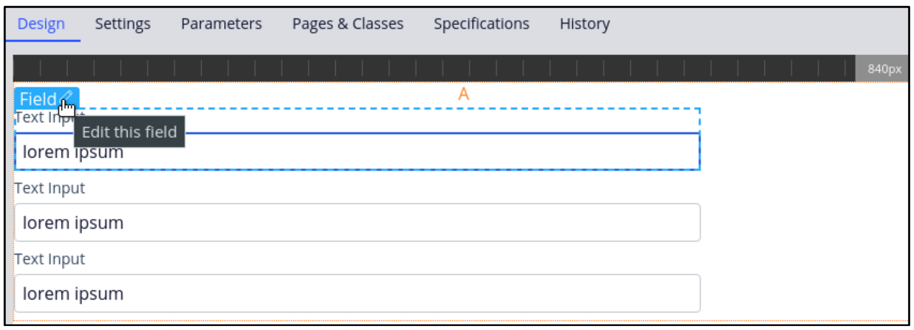


10. In the dialog box click **Text Input**.

11. Repeat steps 10 & 11 to add two more **Text inputs**.



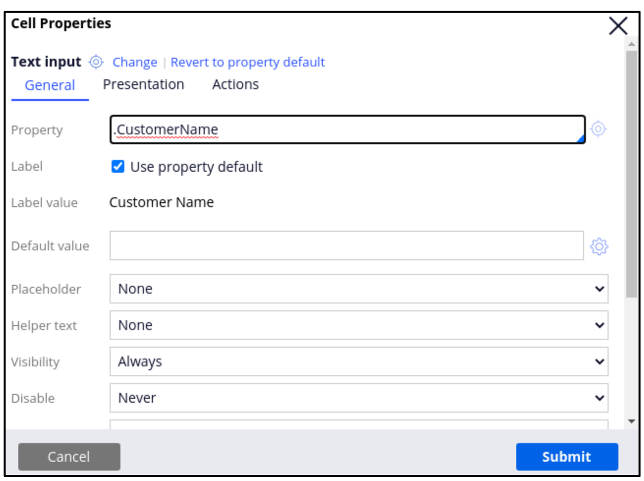
12. Hover over the **Text Input** control, and then click **Edit**.



13. The **Cell Properties** window is displayed.

14. In the **Cell Properties** window, in the **Property** field select or enter **.CustomerName**.

NOTE: Single value properties on a page are referenced with a leading dot (.)



15. Click **Submit** to close the window.

16. Repeat Steps 12 to 13 for **.EmailID** and **.Phone** properties and then click **Save.**

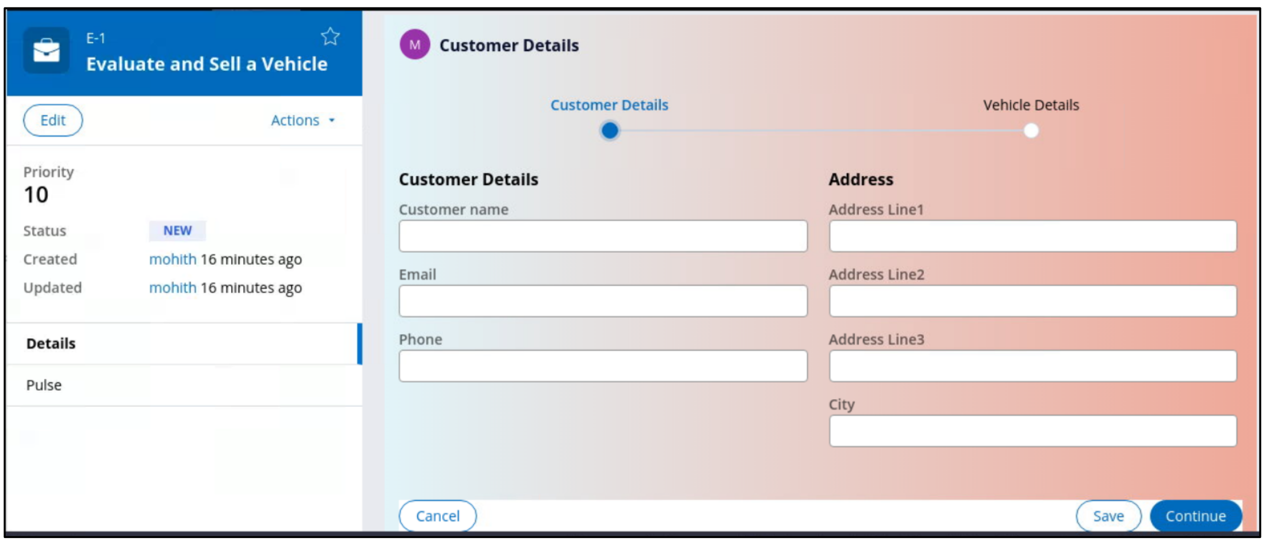
Task 3: Verify your Work

1. Return to the Evaluate and Sell a Vehicle case instance you created.

NOTE: the case should still be open in a tab in Dev Studio.

2. Click **Actions > Refresh**.
3. Click on the **Go** button on the Customer Details screen

4. Verify that the updated section is displayed.



5. **Log Off**.

UI Controls

Scenario

The UI team at Wind has asked you to style Calendar controls to simplify the Calendar appearance.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Application Developer	JOHN_UI@UI_CONTROLS	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Task 2: Modify the style of the Calendar:
Modify the style of the Calendar on the Collect Member Details view.

Task 3: Verify your work

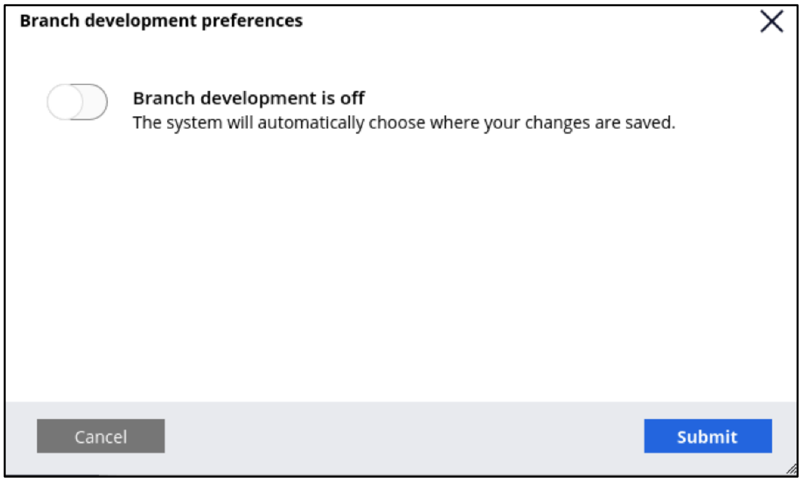
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

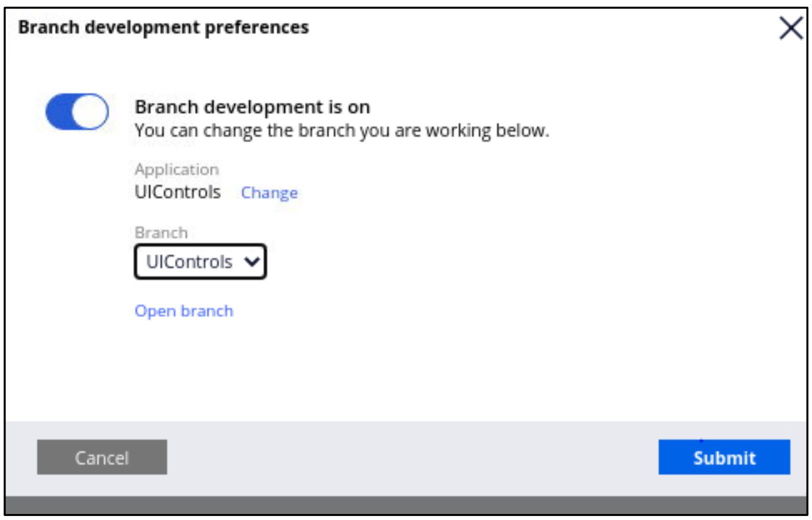
Task 1: Log in and enable branch development

1. Turn Branch Development ON, from the title bar click the **Toggle branch development** button.

2. The following appears:

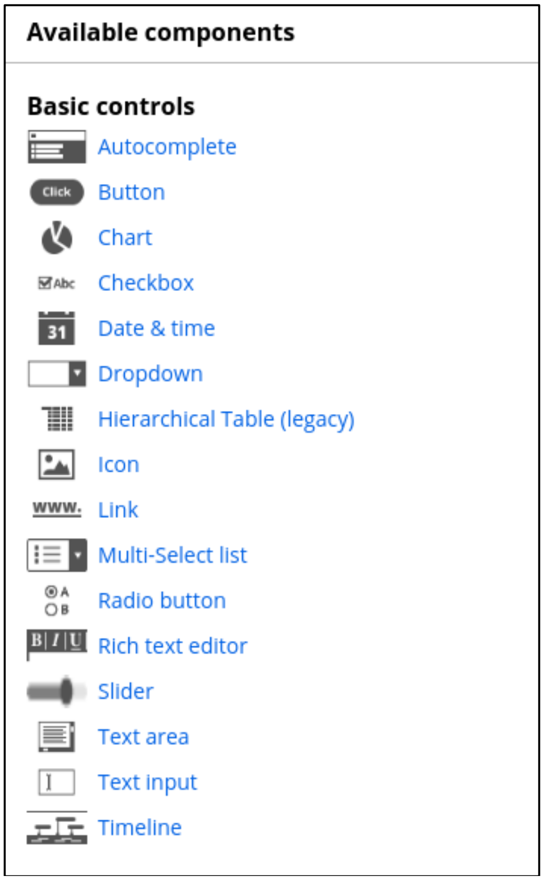


3. Move the slider to turn branch development on.
4. From the **Branch** dropdown ensure **UIControls** is selected and click **Submit**.

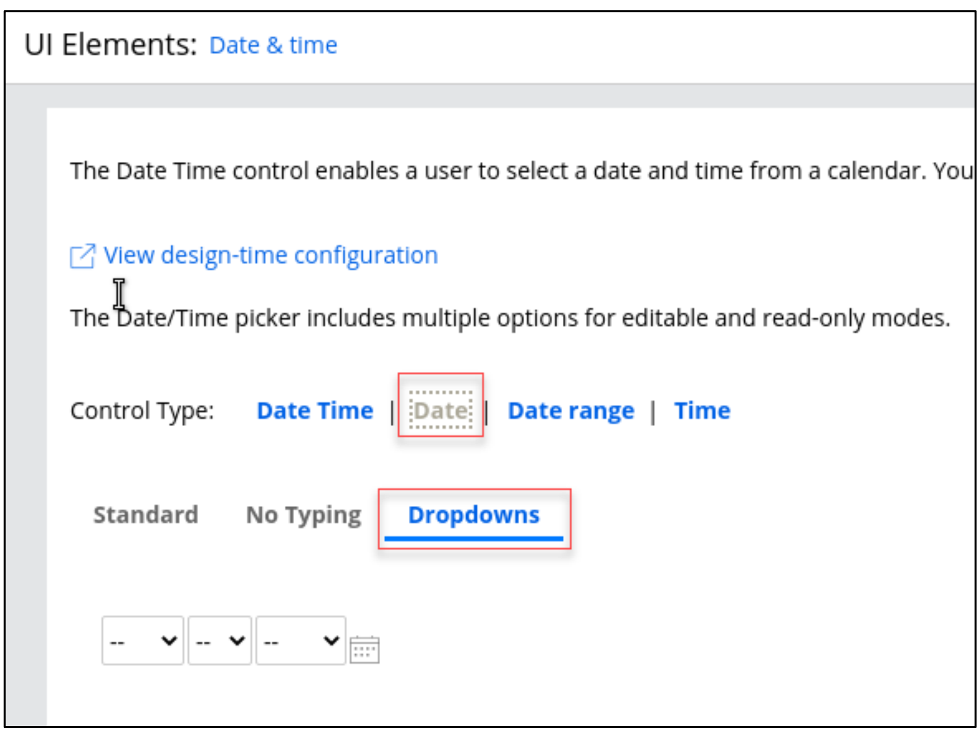


Task 2: Modify the style of the Calendar on the Collect Member Details view

1. In Dev Studio, from the navigation pane, click **Configure** > **User Interface** > **Gallery** > **UI elements**.
2. In the **Available components** section, select the **Date & time** controls.

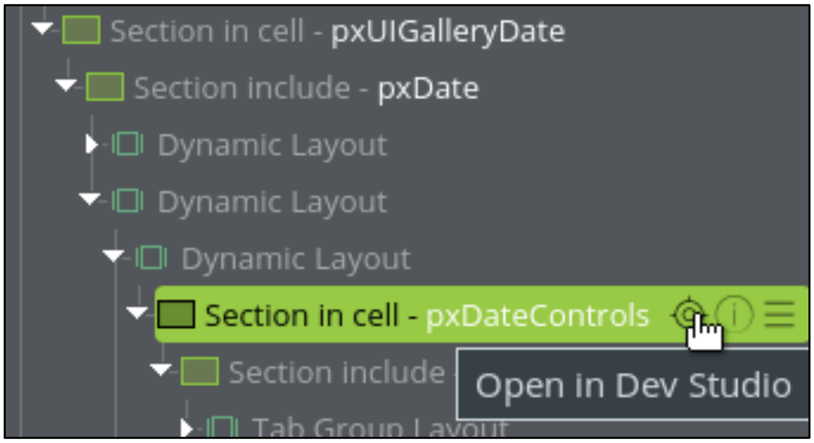


3. In the **UI Elements: Date & Time** section click **Date** and then click **Dropdowns**.

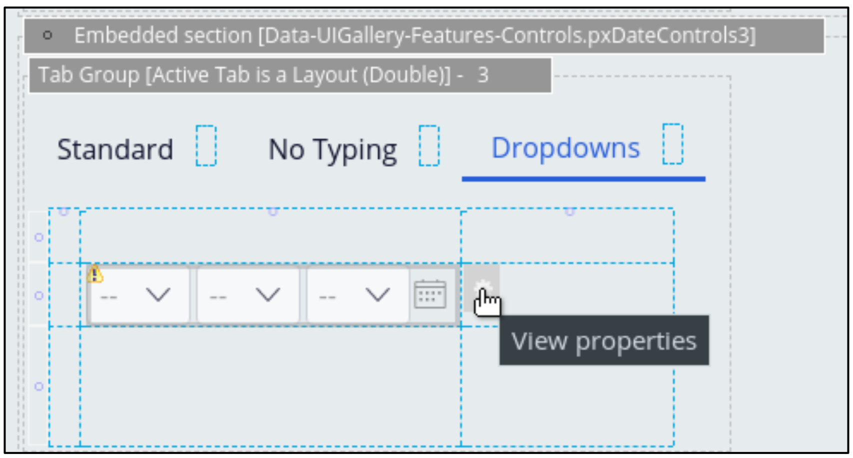


4. In the **Developer Toolbar**, click **Live UI**, and then click the **pxDateControls** section.

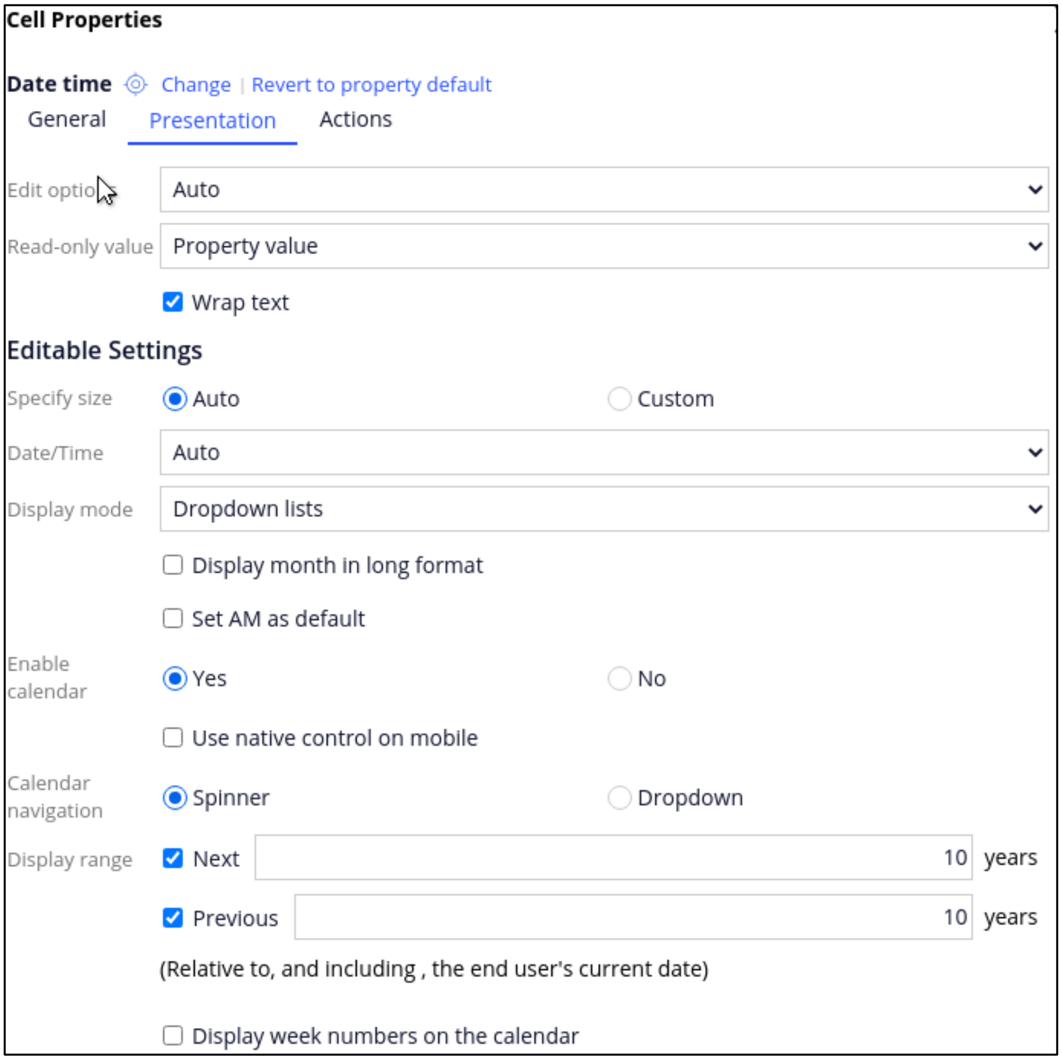
5. Click **Open in Dev Studio** to open the section rule in Dev Studio.



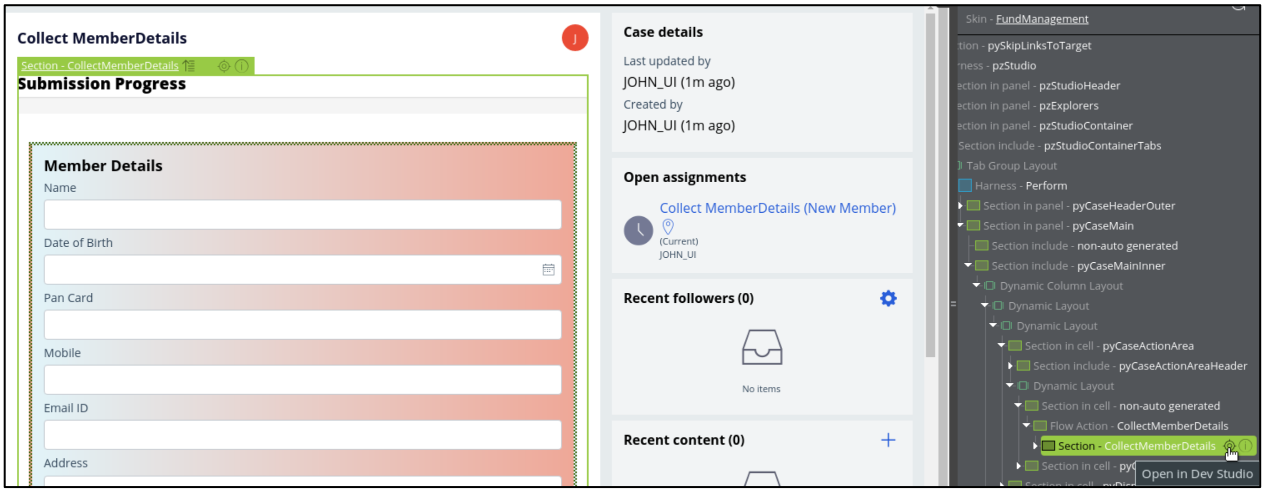
6. Click on the third layout tab group of **pxDateControls3** section. Hover over the **Date & Time** control**,** and then click on **View Properties**.



7. In the **Cell Properties** pane, in the **Presentation** tab, note down the configurations on **Editable Settings**.



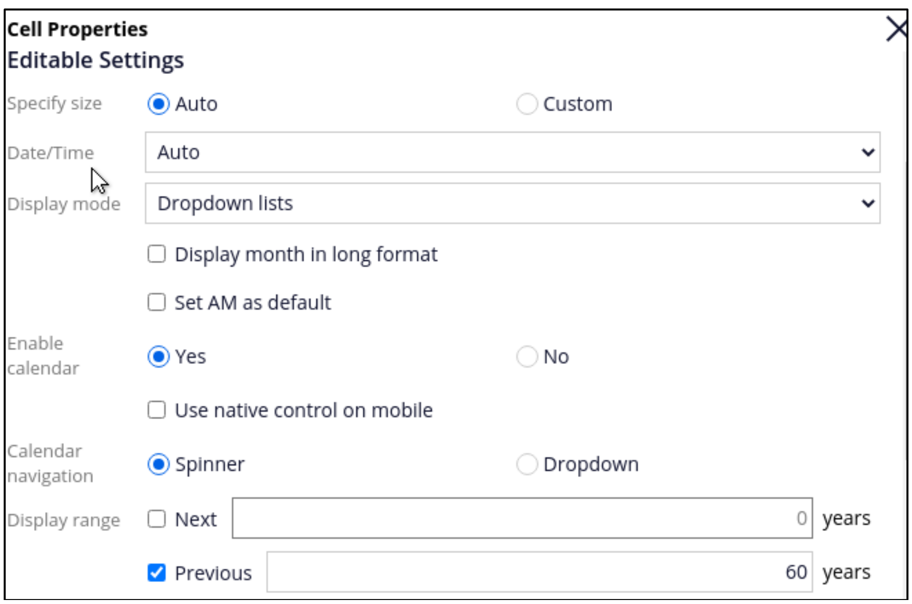
8. In **Dev Studio**, from the navigation pane, click **Case types** > **MemberRegistration** to open the case type.
9. Click **Save and Run** to create a case.
10. In the Developer Toolbar, click **Live UI**, and then click the **Collect Member Details** section and open the section.



11. Click on the **Check out** button to modify the **CollectMemberDetails** section.

12. Click on the **Date of Birth** cell, then click on **View Properties**.

13. In the Cell Properties pane, in the **Presentation** tab, change configurations on **Editable Settings** as given in the screenshot below**.** Click **Submit** button.



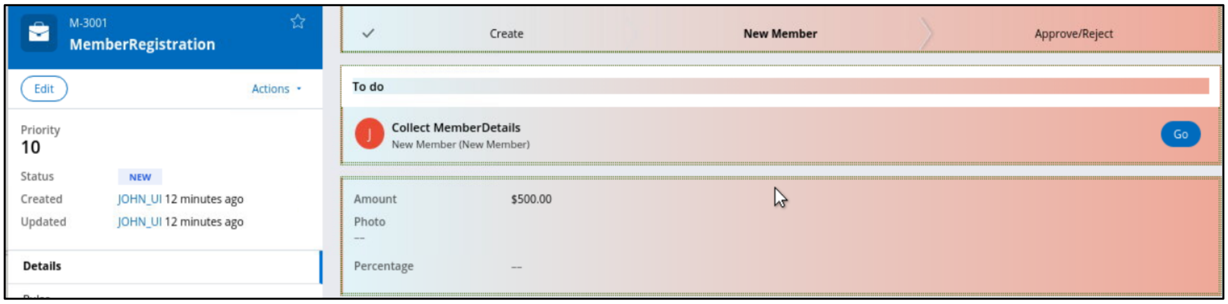
14. Click **Save**, **Check-In** and close the **Collect Member Details Section** rule.

Task 3: Verify your Work

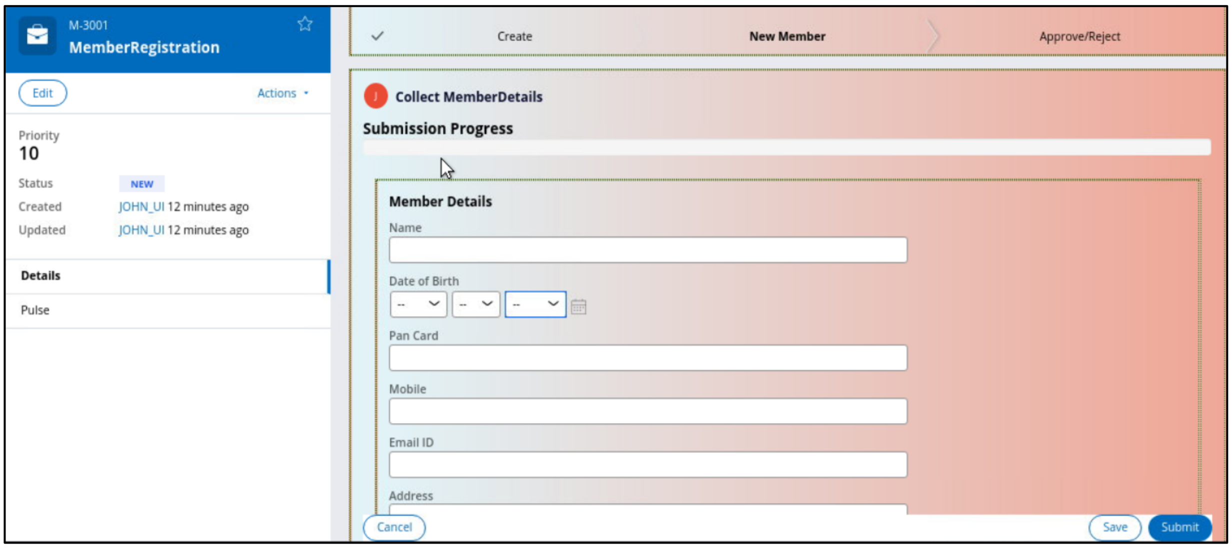
1. Return to the **MemberRegistration** case instance you created.

2. Click **Actions** > **Refresh.**

3. Click on the **Go** button on the **Collect MemberDetails** screen.



4. Verify that the updated section is displayed.

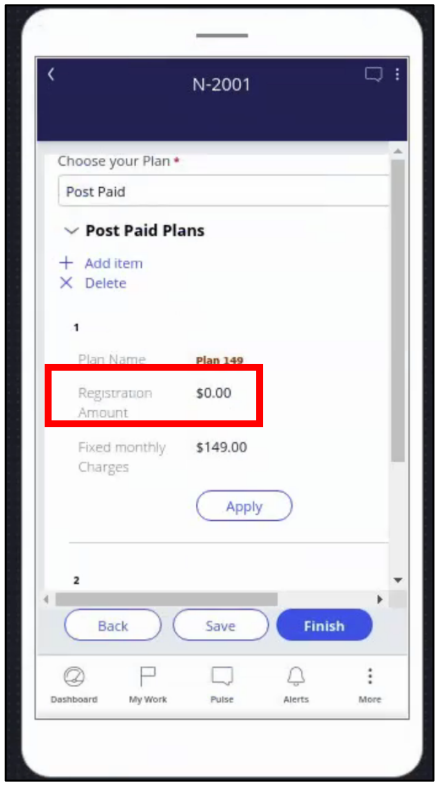


5. **Log off**.

Mobile UI

Scenario

Wind stakeholders want to improve the application display for users by moving the Registration Amount from the Post Plan list when viewing the list on a mobile device.



Use the following credentials to log in to the exercise system:

Role	Username	Password
Application Developer	JOHN_UI@MOBILEUI	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and turn on Branch Development

Task 2: Configure the column order

Change the Registration amount column order to ensure the important plan information displays on mobile devices

Task 3: Verify your work

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

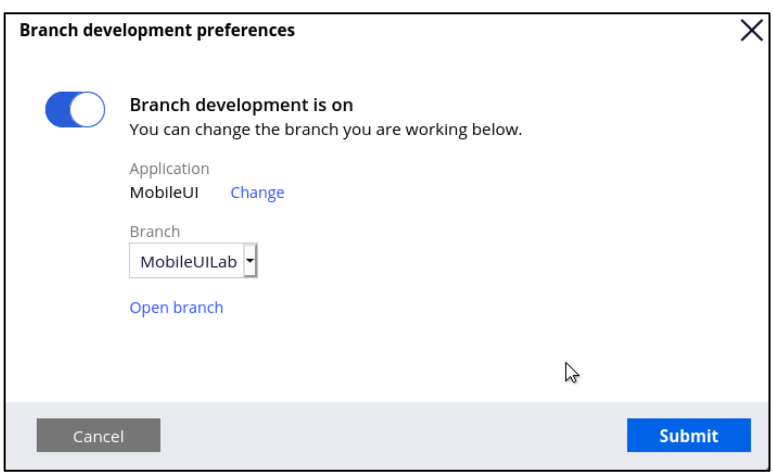
Detailed Steps

Task 1: Log in and enable branch development

1. Log in and use the credentials **JOHN_UI@MOBILEUI** and **rules**.
2. Turn **Branch Development** ON, from the title bar click the **Toggle branch development** button.

3. The following appears:

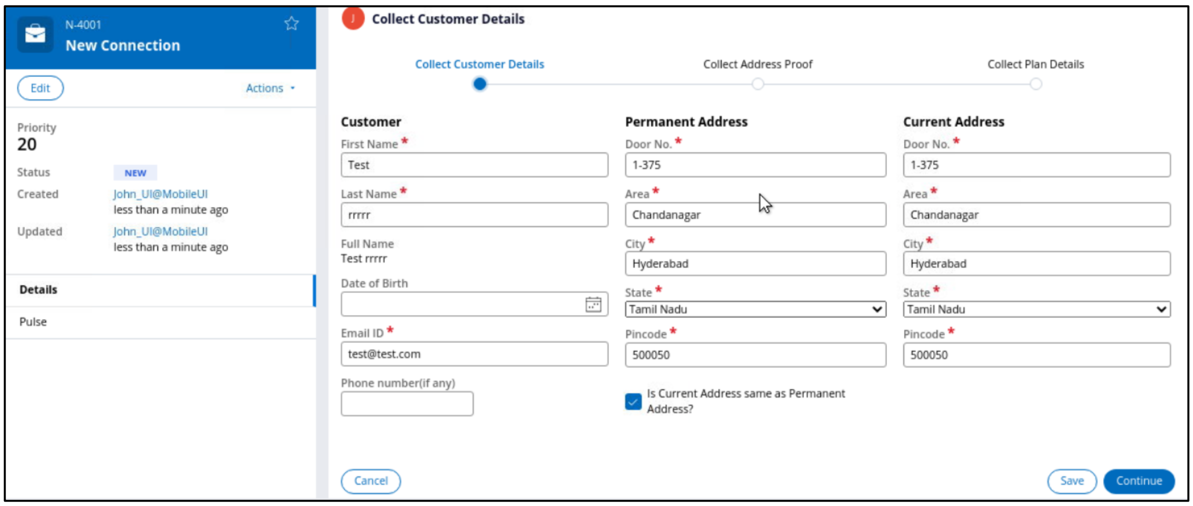
4. Move the slider to turn branch development on.
5. From the **Branch** dropdown ensure that **MobilUILab** is selected and click **Submit**.



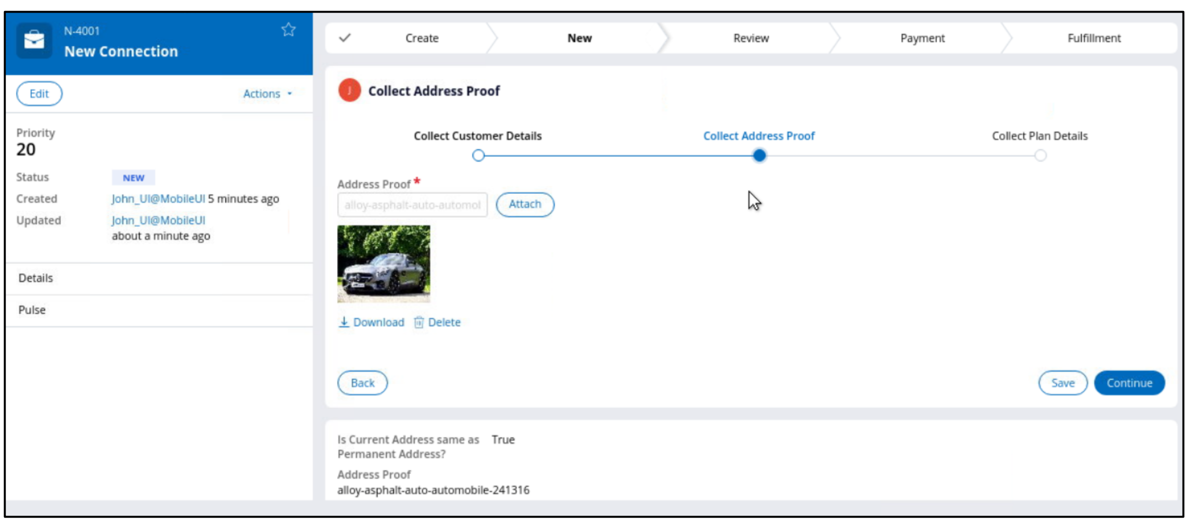
Task 2: Configure the column order.

Change the Registration amount column to ensure plan information displays on mobile devices

1. In **Dev Studio**, from the navigation pane, click **Case types** > **New Connection** to open the case type.
2. Click **Save and run** to create a case.
3. Advance past the **Create** view by doing the following:
   a. Enter dummy data on the **Collect Customer Details** page



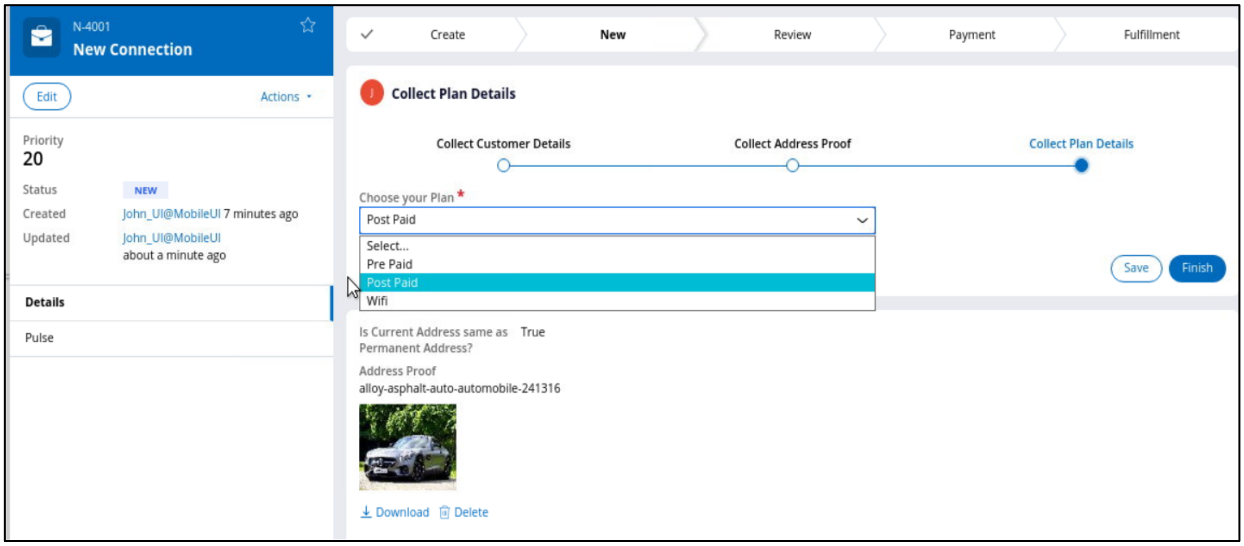
   b. Click **Continue**
   c. Attach a file in the **Collect Address Proof** step



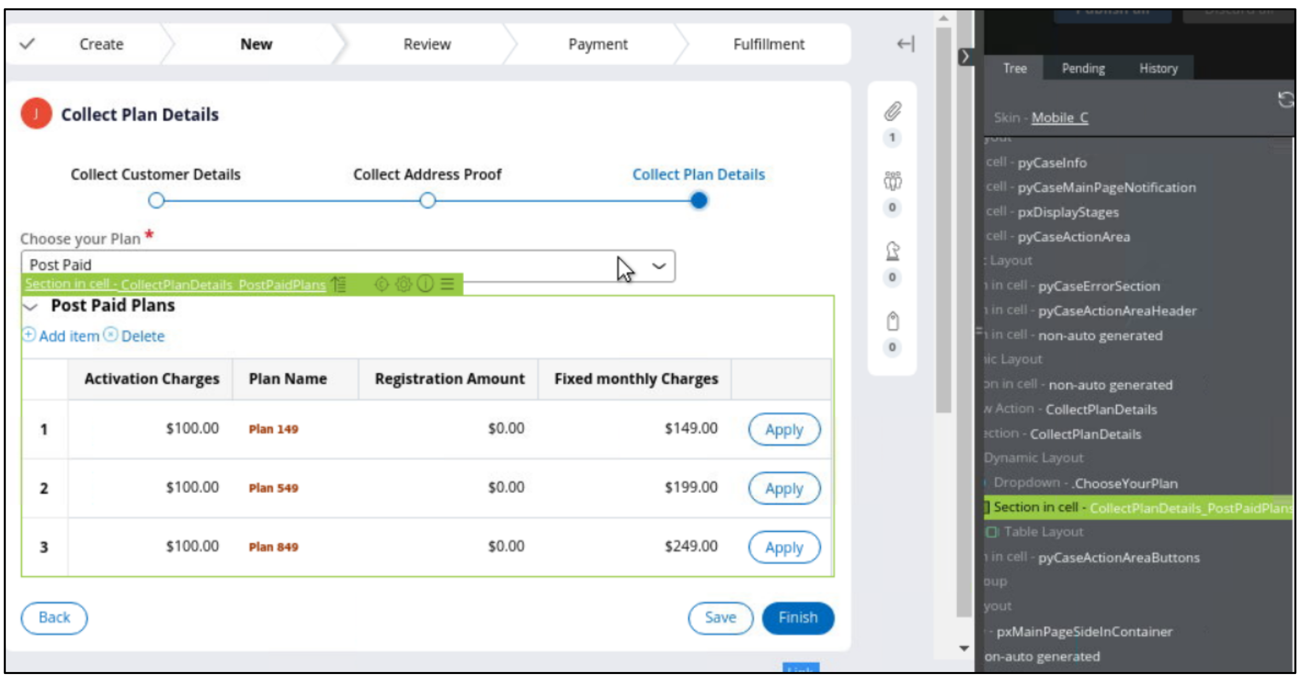
NOTE: There are images in the pictures folder on your desktop.

   d. Click **Continue**

e. Move the case to the **Collect Plan Details** view and select **Post Paid** from the **Choose your plan** drop-down.

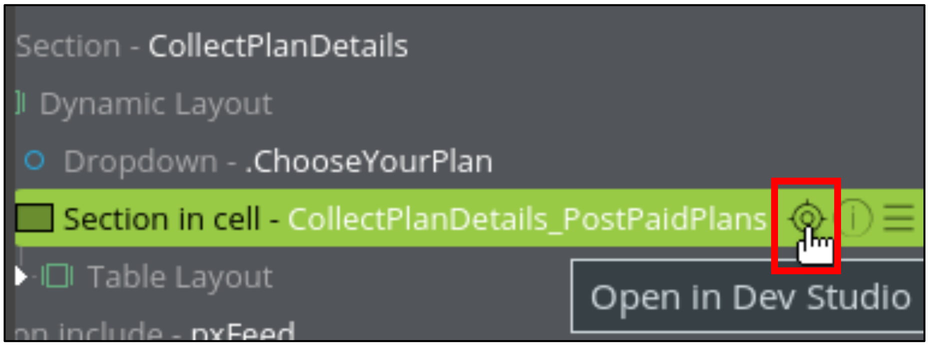


4. In the **Developer Toolbar**, click **Live UI**, and then click the **CollectPlanDetails_PostPaidPlans** section.

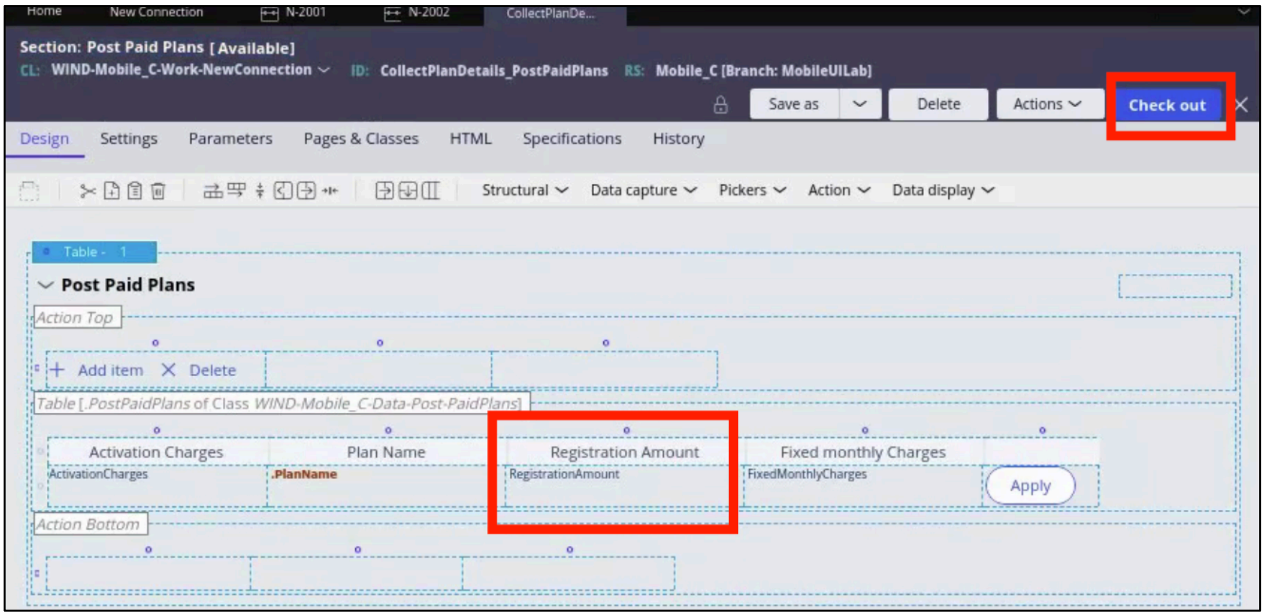


TIP: You can open UI section rules by using the Live UI tool or from the App or Data Explorer. Live UI is best applied for sections that are actively used in the case type.

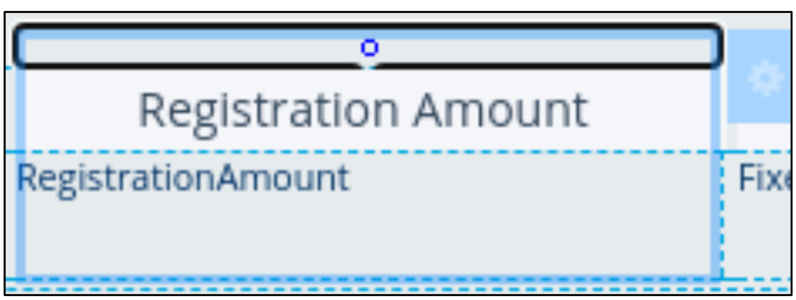
5. Click **Open in Dev Studio** to open the section rule in Dev Studio.



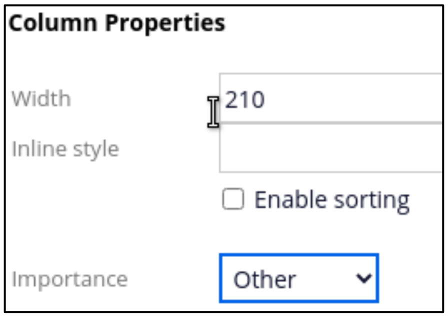
6. Click **Check Out** on **CollectPlanDetails_PostPaidPlans**.



7. Under **Table- 1**, click the small circle above **Registration Amount** to select the Registration Amount column and display the gear icon for the column.



8. Click the **Gear** icon to open the **Column Properties** dialog box.
9. In the **Importance** field, select **Other**. Click **Submit**.



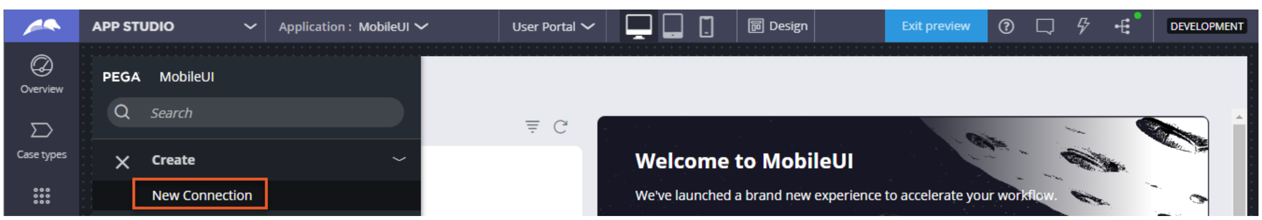
10. Click **Submit** to apply your change.

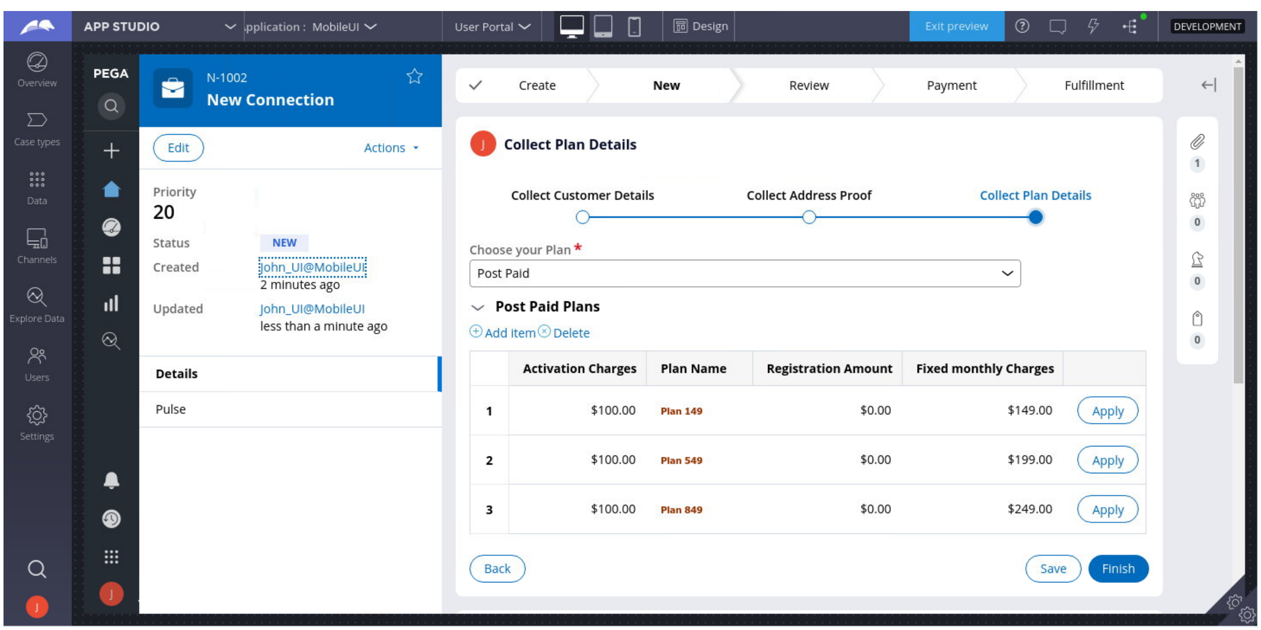
11. Click **Save**, **Check in** and **close CollectPlanDetails_PostPaidPlans**.

Task 3: Verify your Work

1. Switch to **App Studio. Click Preview**. Create a **New Connection** case and **advance** it to **Collect Plan Details**. Select **Post Paid** for your plan. Click **Save**.

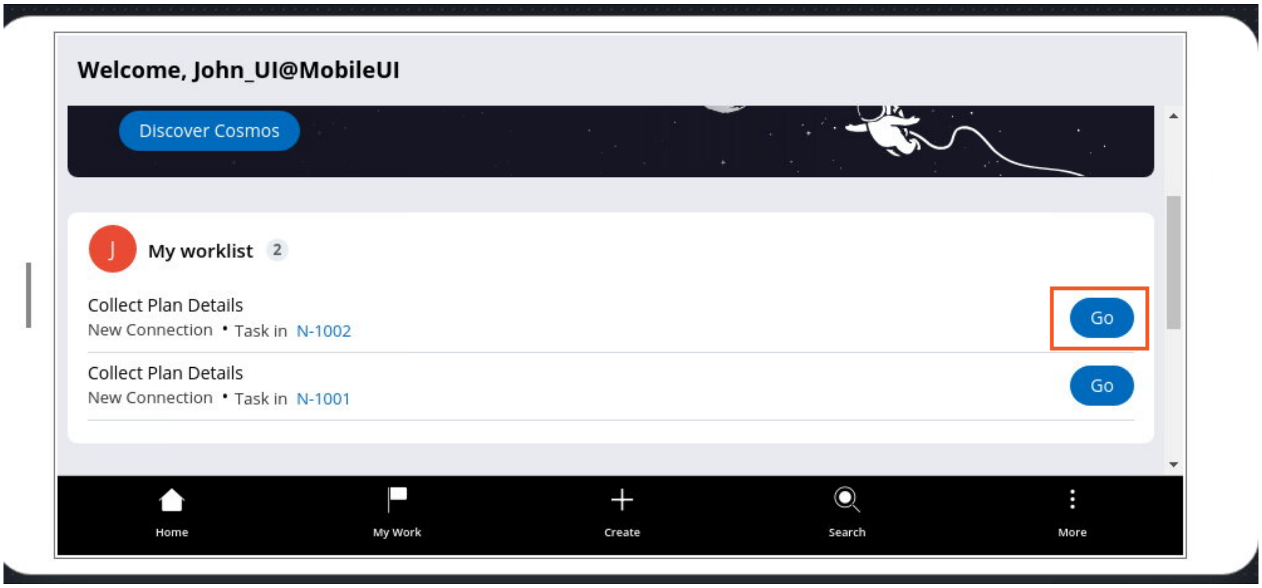
> Note the registration amount is displayed.





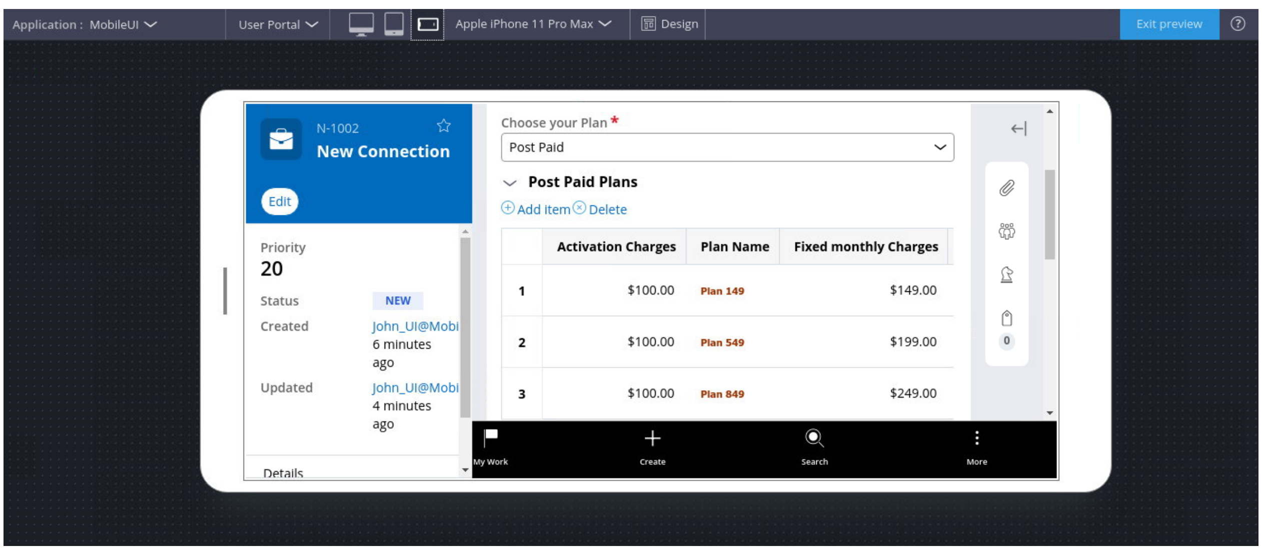
2. In the menu bar, click the Mobile preview icon to preview the case by using a simulated **Apple iPhone 11 Pro Max**.

3. Click twice to rotate to a side view display. Click **Go** to open the last case.



4. The mobile phone layout displays the rows in a scrolling window.

Note the registration amount has disappeared from the display.



5. **Log off**.

Designing a mobile app experience

Scenario

GoGoRoad wants to allow customers to create an assistance request case from their mobile device. Customize the User mobile app channel to design a mobile app experience that lets customers:

- Create an assistance request case
- Check any notifications sent to the customer
- Update details on an assistance request case
- Update the location for an assistance request case
- Log off

In addition, customize the app branding, including the launch screen and app icon, and configure theapp to lock after three minutes of inactivity.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Application Developer	author@mobilechannel	rules

Your Assignment

Your assignment consists of the following tasks:

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

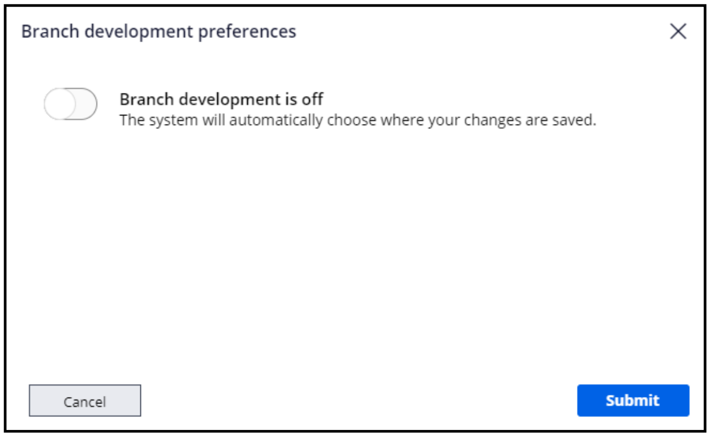
Detailed Steps

Task 1: Log in and enable branch development

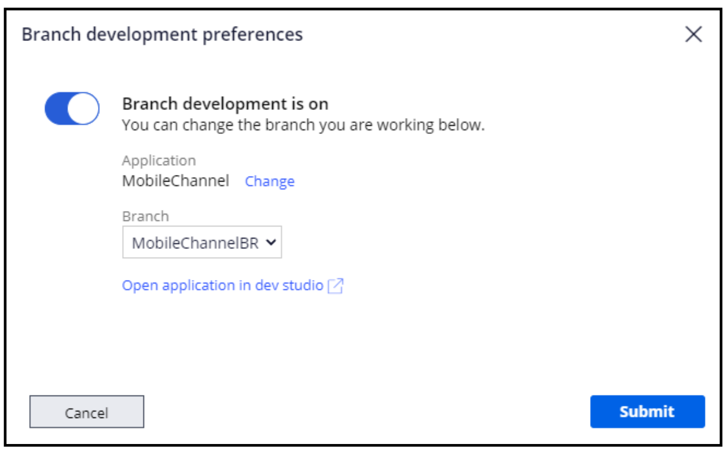
1. Log in and use the credentials **author@mobilechannel** and **rules**.

1. Turn **Branch Development** ON, from the title bar click the **Toggle branch development** button.

2. The following appears:



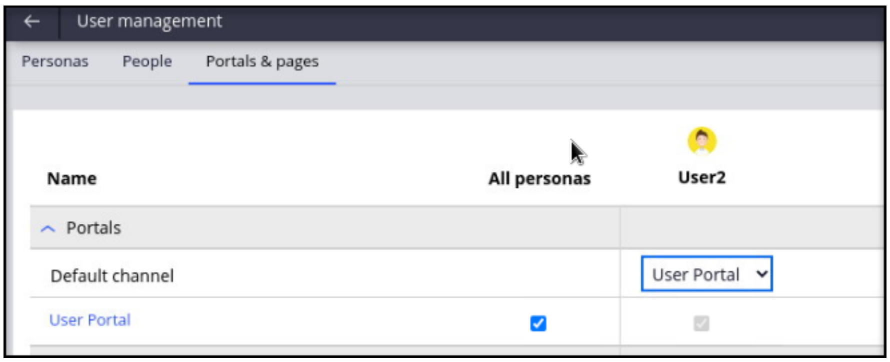
3. Move the slider to turn branch development on.
4. From the **Branch** dropdown ensure that **MobilUILab** is selected and click **Submit**.



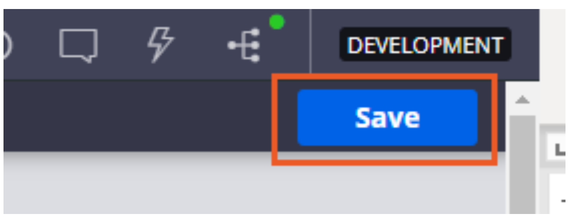
Task 2: Add new person and portal

1. In the navigation pane of App Studio, **click** the **Users** to access the **User management configuration**.
2. **Add** a new persona called **User2**.

3. On the **Portals & pages** tab set the **Default channel** to **User Portal**.

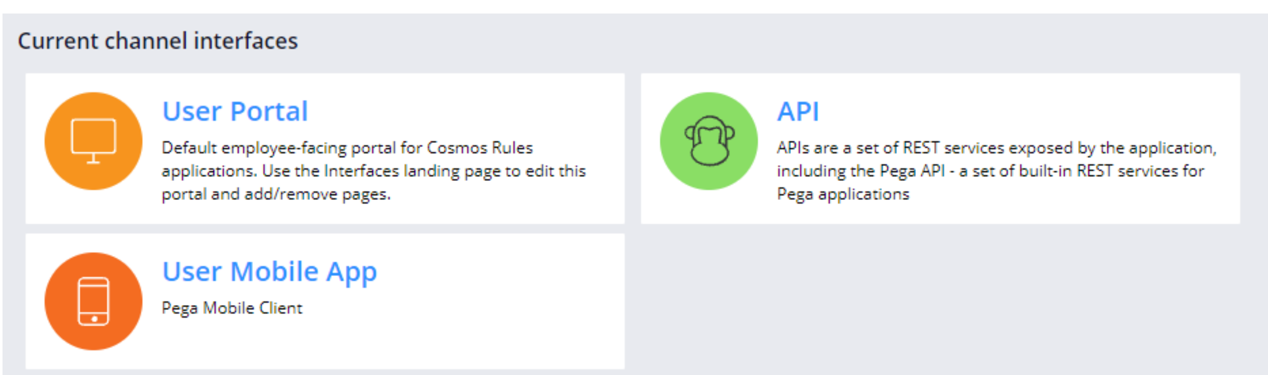


4. Click **Save.**

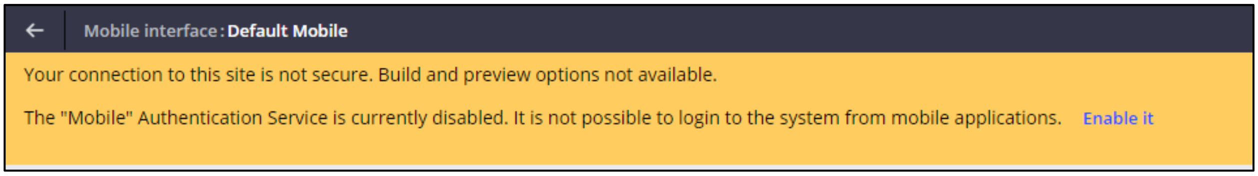


Task 3: Configure navigation for the app menu

1. In the navigation pane of **App Studio**, click **Channels** to access the multi-channel configuration.
2. In the **Current channel interfaces** section, **click User Mobile App** to begin working on the mobile application.

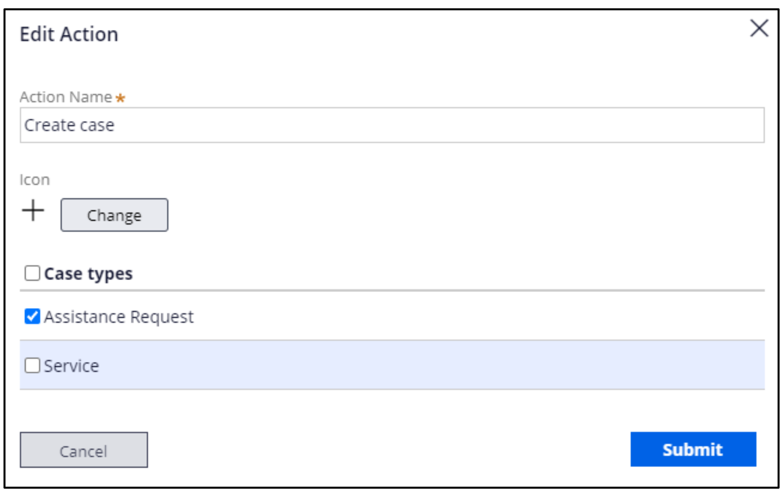


3. Click **Enable it**.

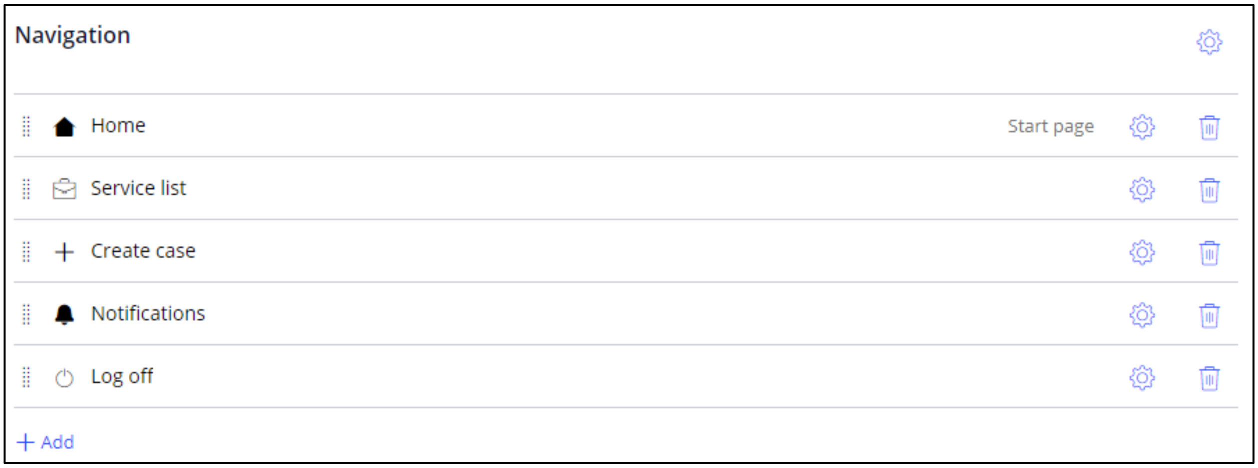


4. In the **Navigation** section, to the right of + **Create case**, click the **Gear** icon to change the settings.

5. Select only the **Assistance Request** check box and click **Submit** to close the dialog box.

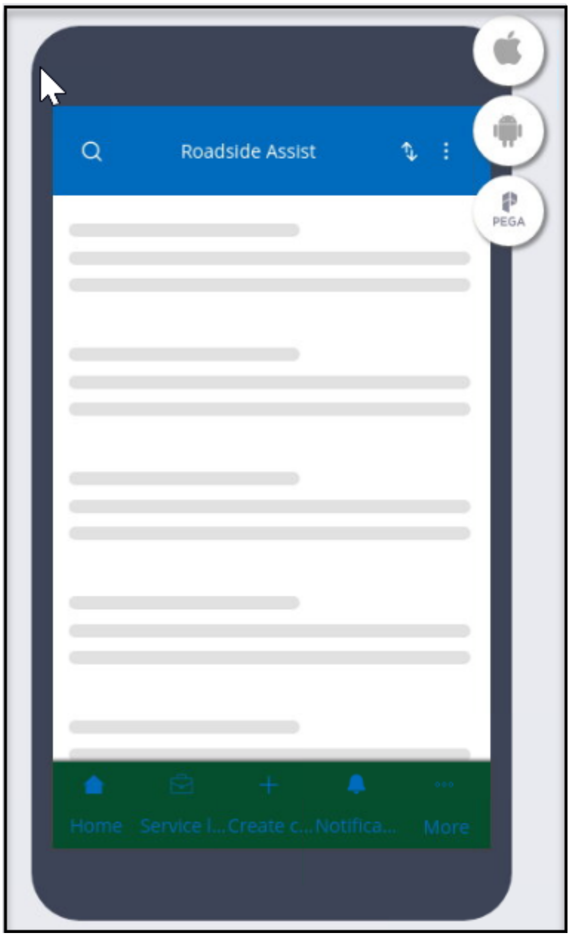


6. In the **Navigation** section, click + **Add > List pages** to display a list of menu options.
7. In the options under the **List pages** category, click **Service list** to add it to the interface.
8. In the **Navigation** section, drag the handle icons to reflect the following order: *Home, Service list, Create Case, Notifications, Log off.*
9. In the **Navigation** section, click the **Delete** icon in the remaining item rows so that the **Navigation** section resembles the following image



10. Click **Save**

11. In the mobile app preview, confirm that the bottom navigation has only four options.

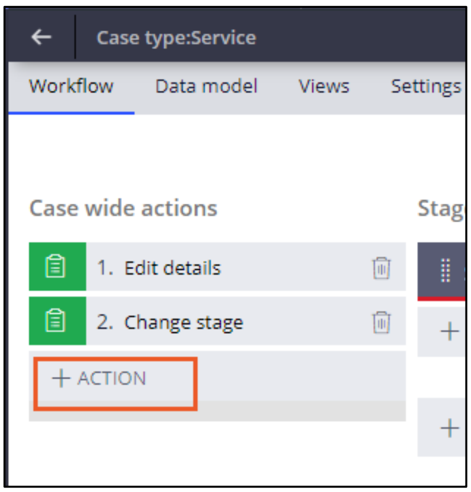


Task 4: Add actions for the Service Request cases

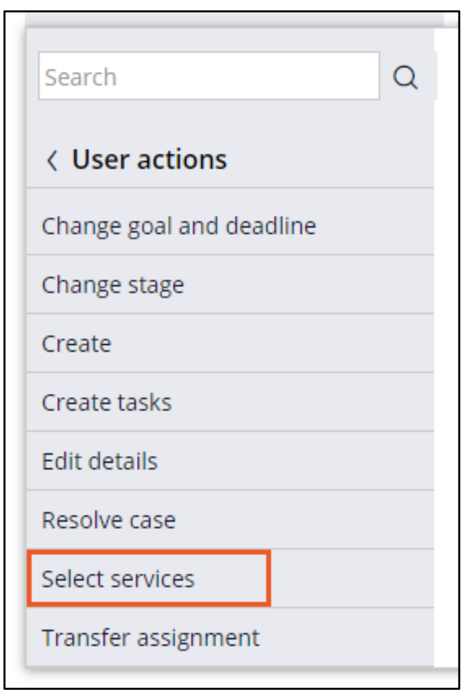
1. In the navigation pane of **App Studio**, click **Case Types**. Select the **Service** case type.

2. Click **Optional actions**.

2. Click **+Action** to add a case wide action.

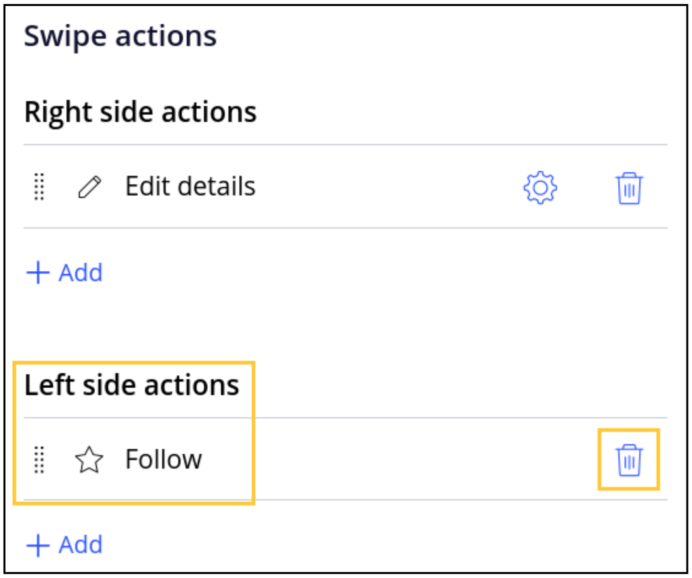


3. In the **User actions** list, select **Select services**.

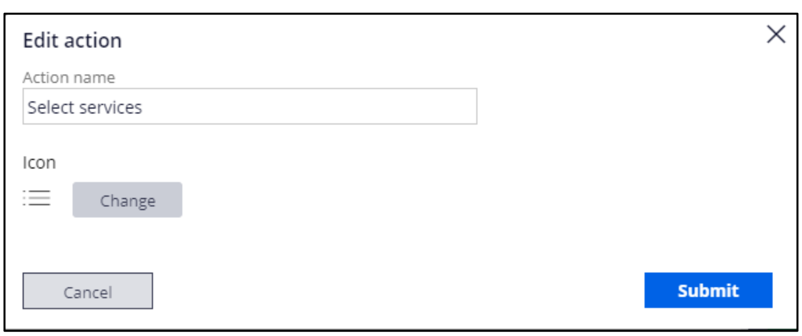


4. Click **Save**.

5. In the navigation pane of **App Studio**, click **Channels** to access the multi-channel configuration.
6. In the **Current channel interfaces** section, **click User Mobile App** to begin working on the mobile application.
7. On the Content tab, click **List pages**, and then **Service list** to access the Service list page settings.
8. In the **Swipe actions** area, in the **Left side actions** section, to the right of **Follow**, click the **Delete** icon to remove the swipe action

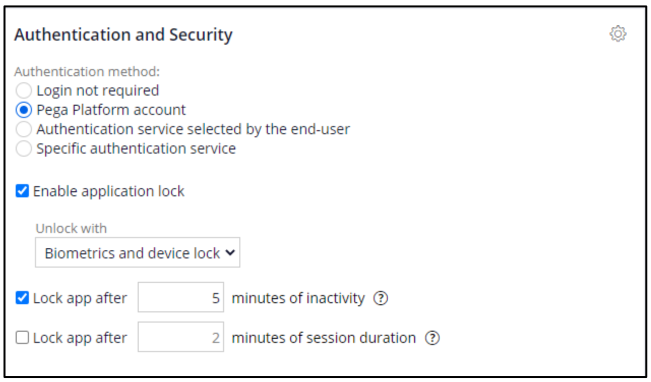


9. In the **Left side actions** section, click **Add**, and then **Select services** to add the swipe action.
10. To the right of **Select services**, click the **Gear** icon to open the **Edit settings** dialog box.
11. In the **Edit settings** dialog box, click **Change** to access the Icon class picker window.
12. In the **Icon class picker** window, in the **Search** field, enter pi-list.
13. In the **Icon class picker** window, select the **pi-list** icon, and then click **Submit** to close the **Edit settings** dialog box.



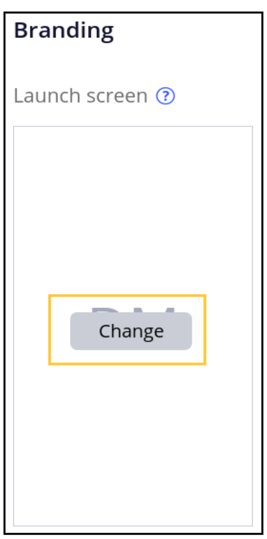
Task 5: Configure app name, description, and security

1. On the mobile channel page, **select** the **Configuration** tab and **click** the **General** category.
2. In the **Mobile app name** field, **enter Roadside Assistant** to rename your mobile app.
3. In the **Description** field, **enter Help is never far away with Roadside Assist!**
4. In the **Select role** list, **select User2** to grant access to the User role for this channel.
5. In the left menu navigation, **select** the **Security** category.
6. In the **Authentication and Security** settings section, enter 5 as the time-out value in the **Lockapp after *x* minutes of inactivity** field

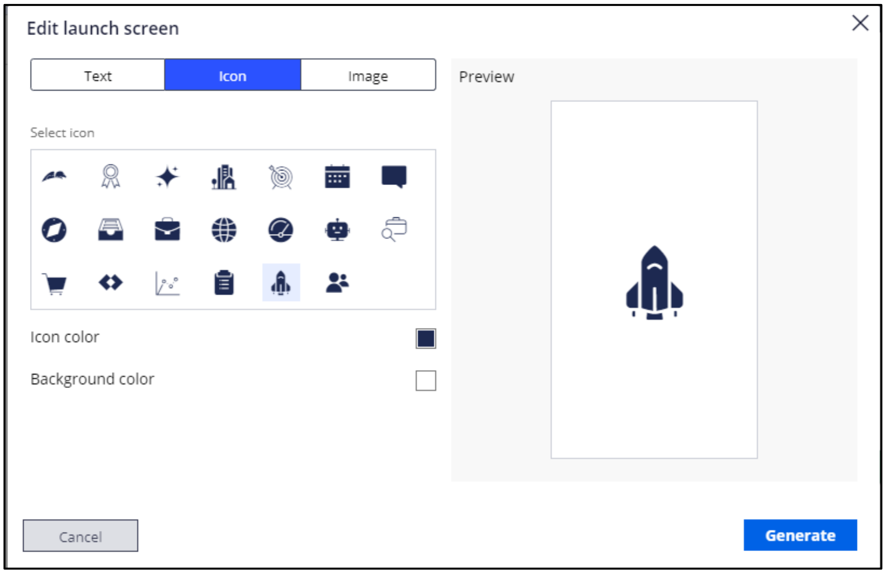


Task 6: Customize the app branding

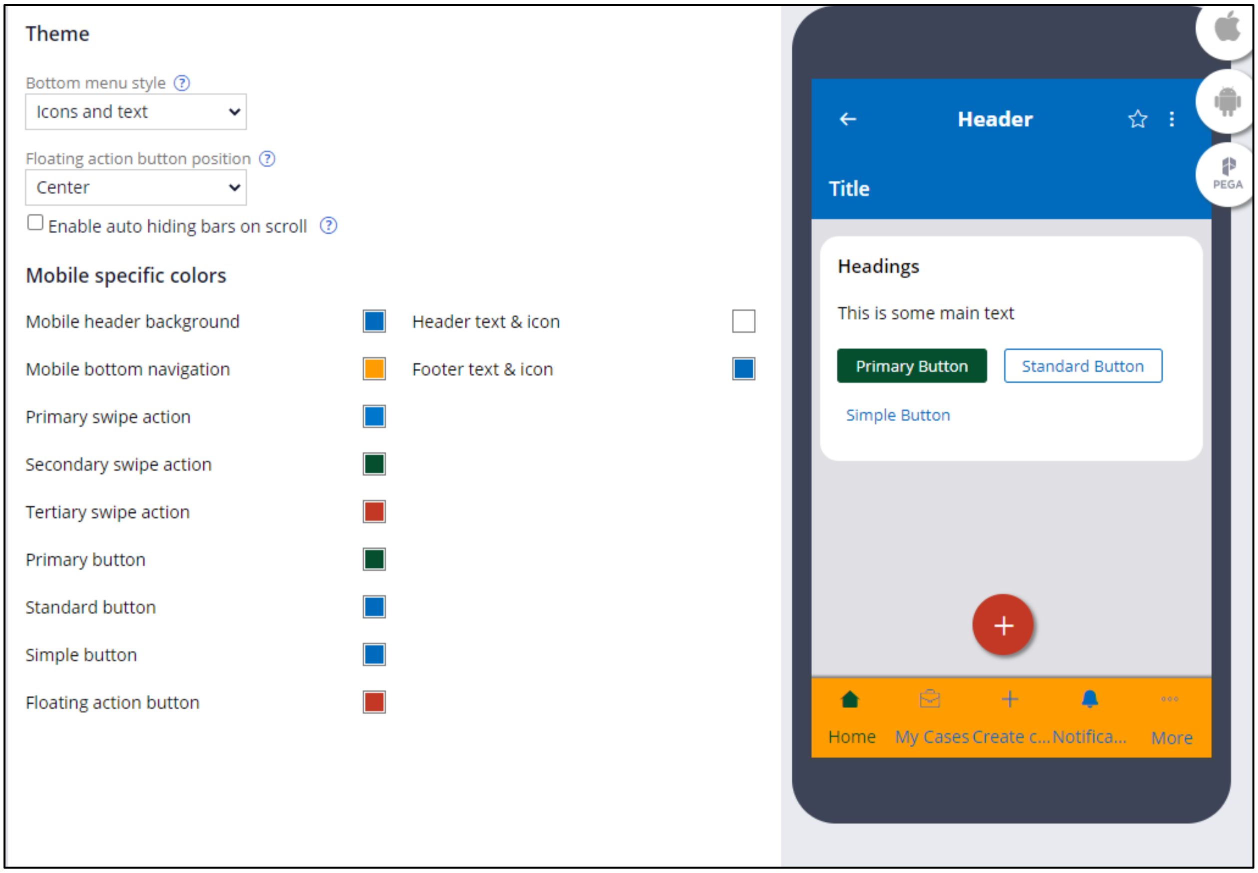
1. On the **Layout** tab, click the **Branding** category to configure branding options.
2. Hover your pointer over the **Launch screen** area to display a **Change** box.
3. Click **Change** to open the **Launch screen** window. In the **Launch screen** window, click the **Icon** tab to select a launch screen icon.



4. In the **Select icon** area, click the **space ship** icon to select it as your launch screen icon.



5. Click **Generate** to add the icon to the Roadside assist app.
6. Repeat steps 2-5 to change the App icon.
7. Click **Save**.
8. Click the **Theme** category to configure your mobile app's theme.
9. In the **Mobile specific colors** section, click the swatch to the right of **Mobile bottom navigation**.
10. In the color swatch window, select Orange, or enter the **Hex value # FF9D00**.
11. Click **Save** to make your selection and dismiss the color swatch window.
12. Repeat steps 9-11 to change the color for **Secondary swipe action** and **Primary button** to dark green **#064F2E**.
13. In the mobile app preview, confirm your color changes.

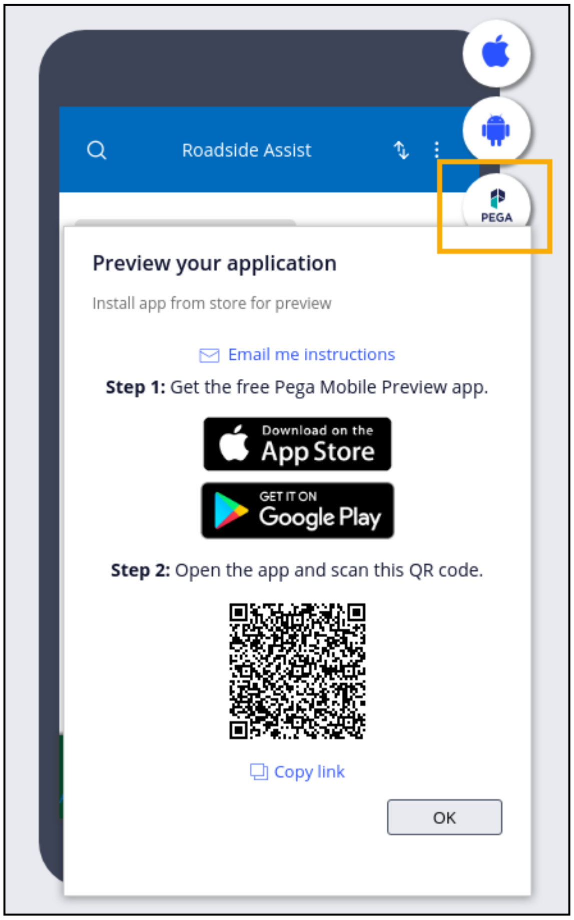


14. In the main App Studio window, click **Save** to save your changes.

Task 7: Verify your work

Note: To generate a preview of your mobile application, you need to connect to Pega using SSL. This has not been conifured in the Classroom training environment. The ability to generate a build or QR code is disabled.

1. Install Pega Mobile Preview from your device-specific app store (App Store for iOS or GooglePlay for Android).
2. In your web browser, in the upper right, click the Pega icon to generate your QR code.



3. Open Pega Mobile Preview and scan the QR code to preview your app.

Note: You can further check your work by opening the app and confirming that the preview on the device matches the preview in the channel

Portal and Dashboard

Scenario

The Auto Application Case Life Cycle, Evaluate and Sell A Vehicle has been defined. The application has been running in production for several weeks. The Manager wants to personalize the Dashboard. Personalizing the Dashboard will help in finding basic information about the application more efficiently by organizing the dashboard comprehensively and transparently.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Author	admin@portal	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Log in and enable branch development

Enable branch development to allow modification to the design of the application.

Task 2: Generate a navigation menu for a portal

Add a Navigation menu to organize the portal contents.

Task 3: Modify The dashboard

Modify the dashboard.

Task 4: Adding a widget to the dashboard

Modify the dashboard by adding a widget.

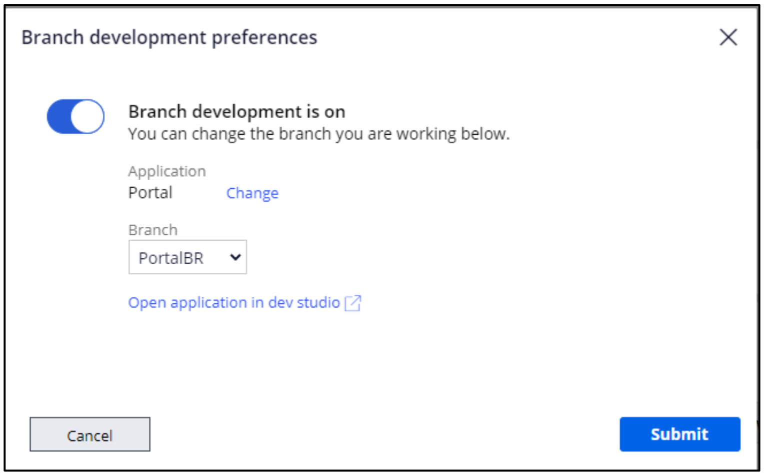
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

Task 1: Login in and enable branch development

1. Log in to Pega using the username **admin@portal** and the password of **rules**.
2. From the title bar click the **Toggle branch development** button.

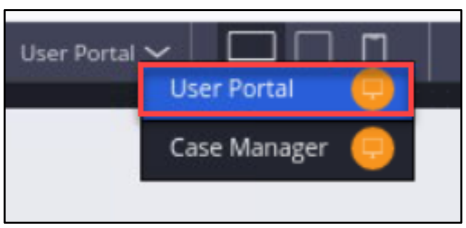
3. Move the slider to turn branch development on. From the **Branch** dropdown ensure that **PortalBR** is selected and click **Submit**.



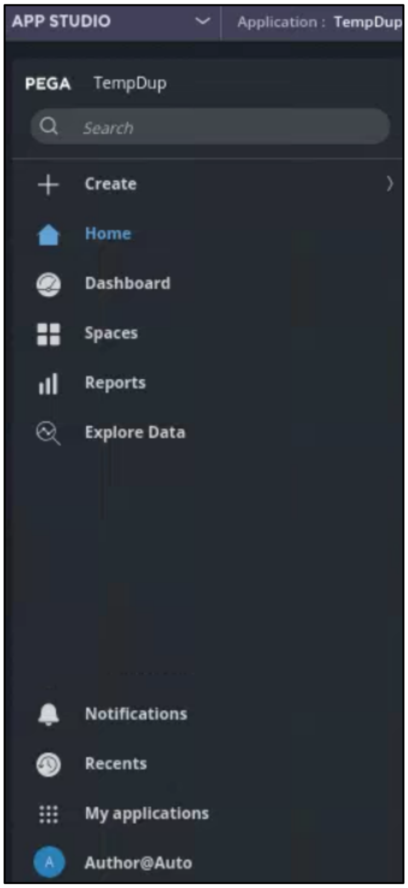
Task 2: Generate a navigation menu for a portal

1. In **App Studio**, click **Preview** to preview the application.

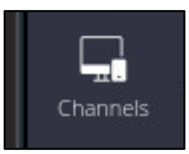
2. Select the **User Portal**.



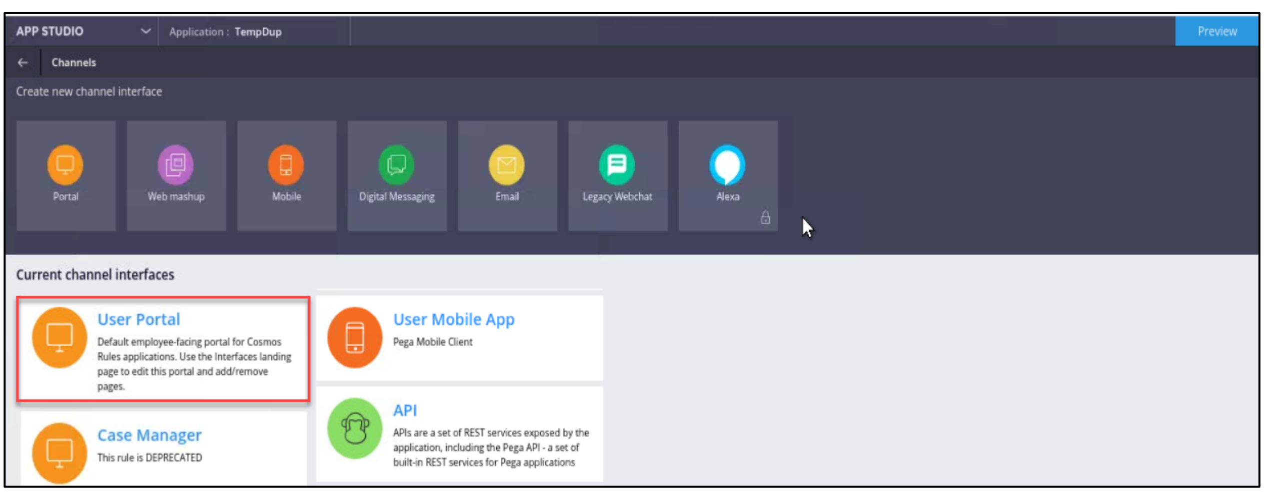
3. Note the menu for the User Portal looks like the following:



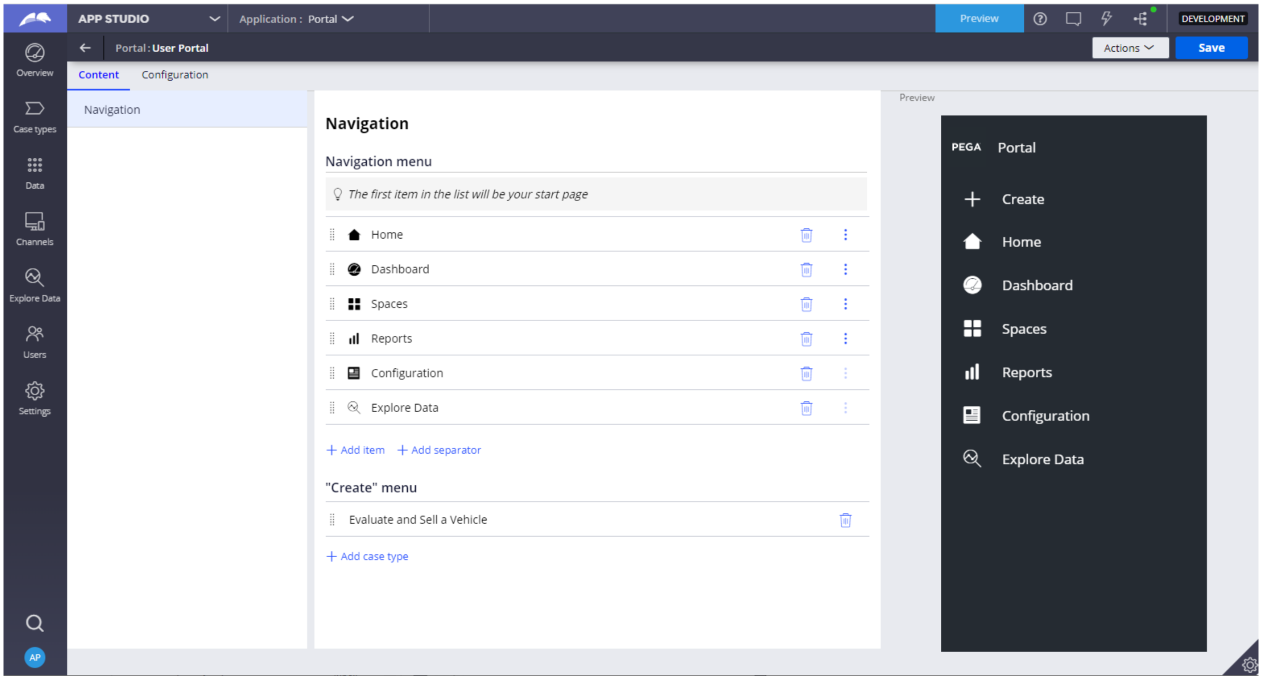
4. In the navigation pane of App Studio, click **Channels**.



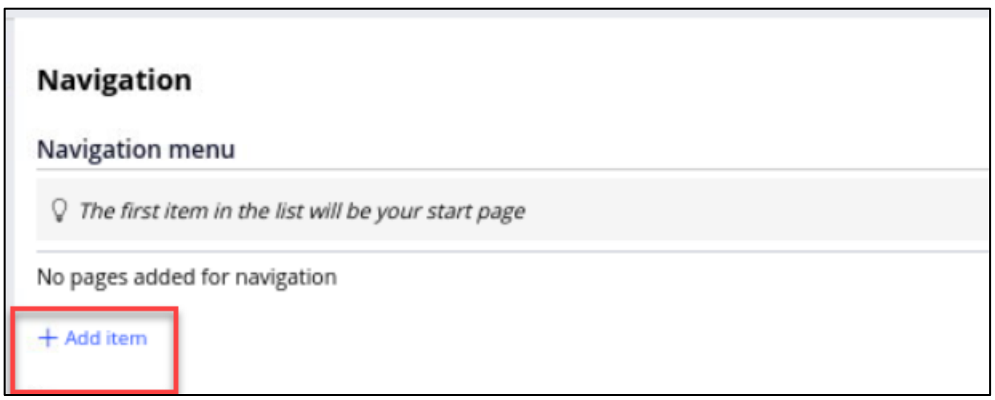
5. In the **Current channel interfaces** section, click the web channel for which you want to generate the menu. For this example, click **User Portal**.



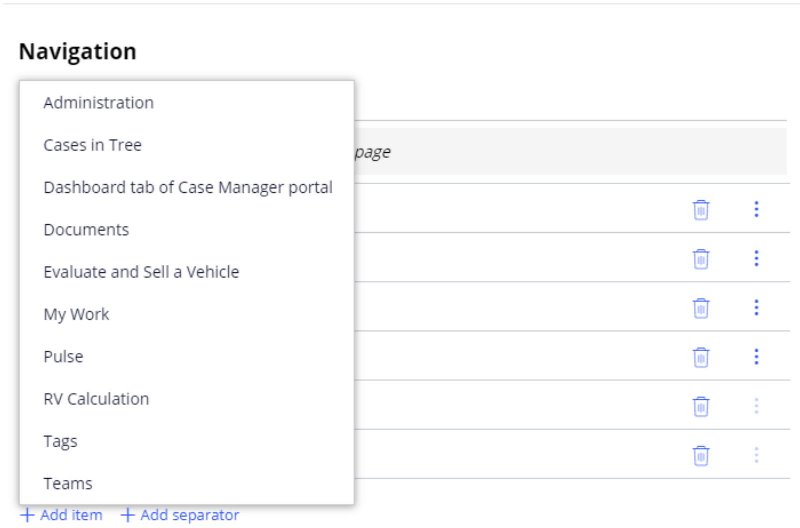
6. The below screen appears to add new pages to the **Navigation menu**.



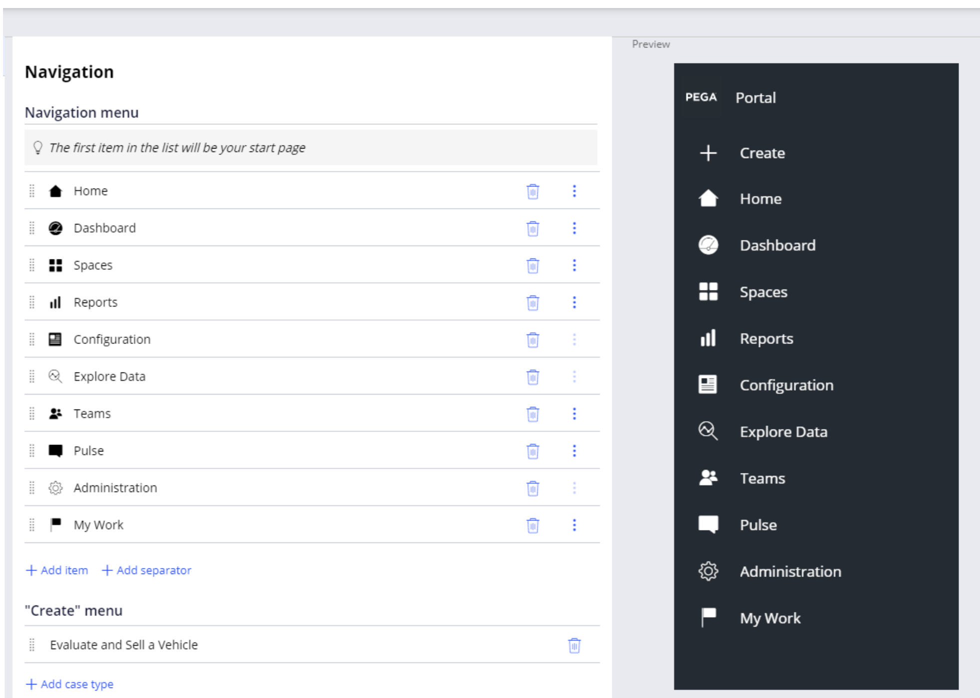
7. In the **Navigation** section, click on the **Add item** button.



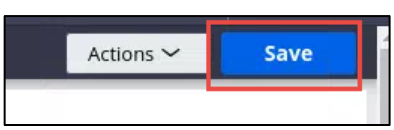
8. In the list of existing pages, **select 4 pages** to add to the menu.



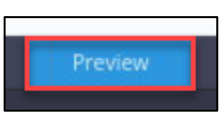
9. In this example, we picked **Teams, Pulse, Administration,** and **My Work** from the list.



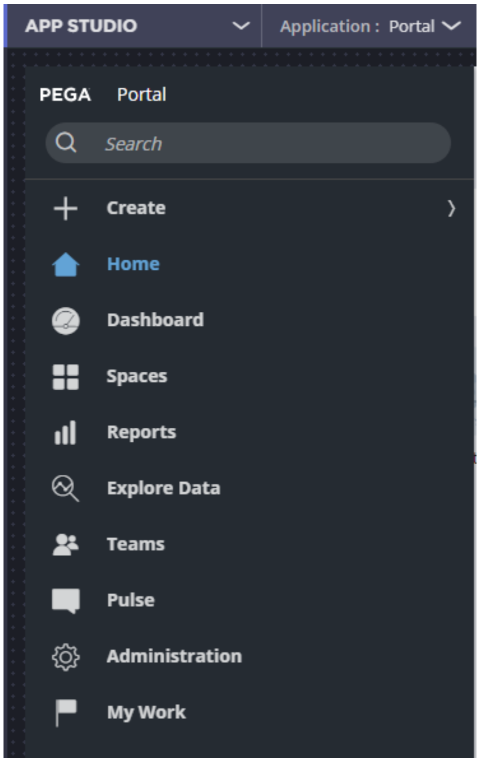
10. Click **Save**.



11. Click **Preview**.

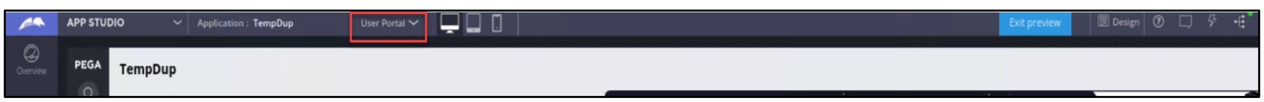


12. Note the menu has the pages you identified.

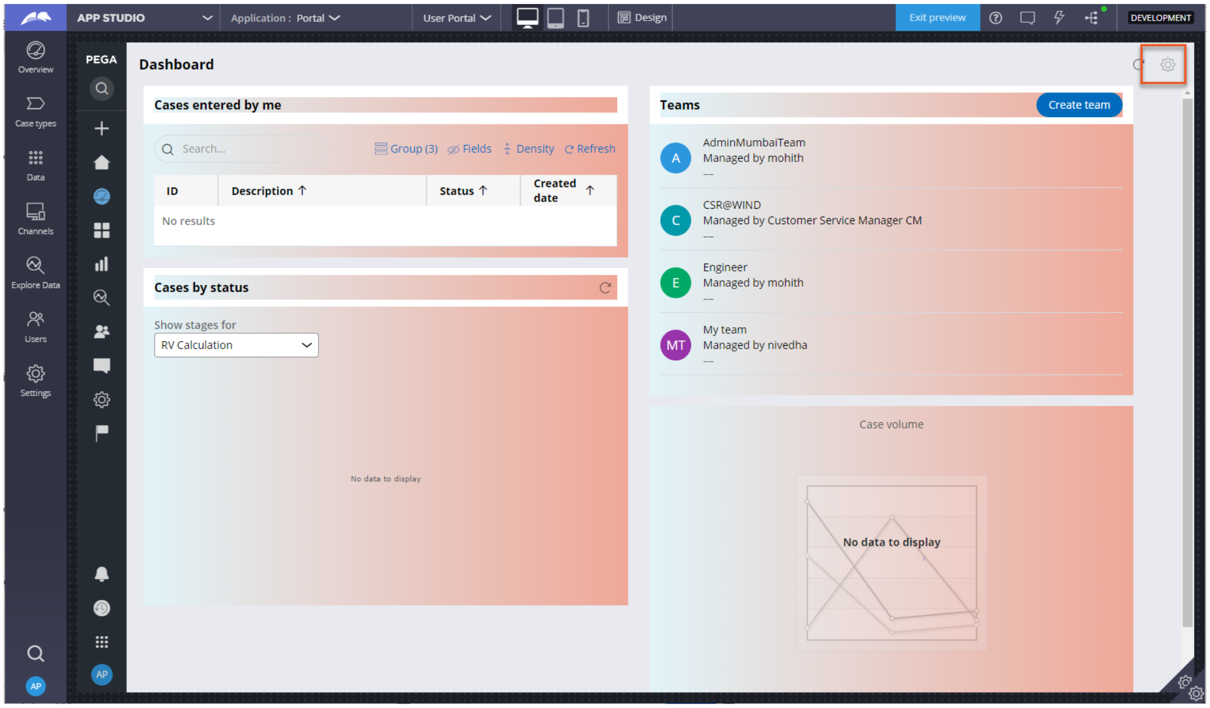


Task 3: Modify the Dashboard

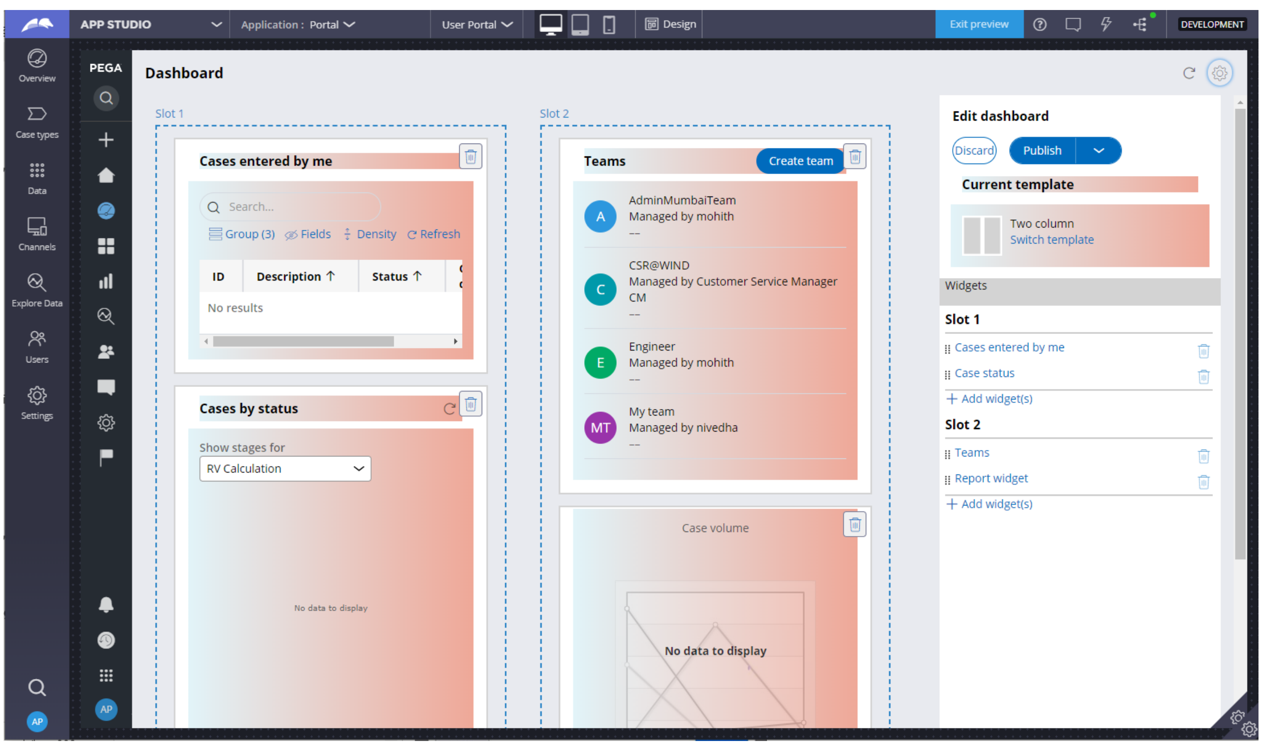
1. Confirm you are still in **App Studio** in **Preview** for the User Portal.



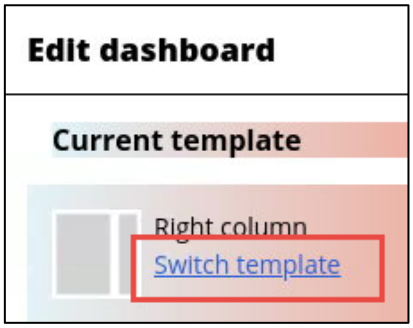
2. Click on **Dashboard** in the **left hand navigation pane**. In the **User Portal Header Workspace**; click on the personalize icon in the **Dashboard**.



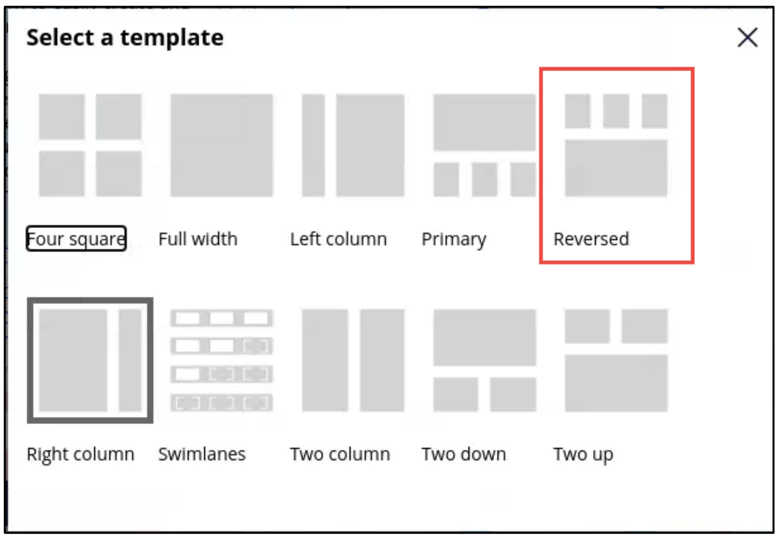
3. You will see the following:



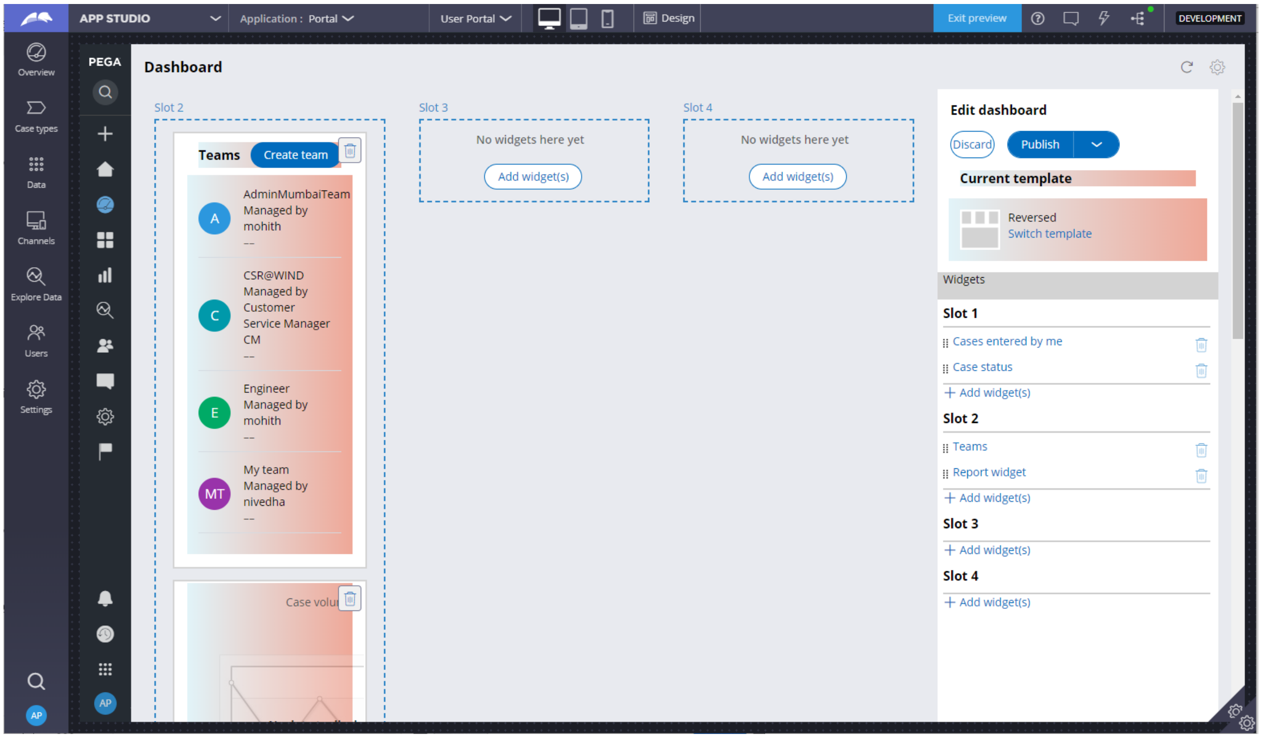
4. In the **Edit dashboard** panel, click **Switch template**.



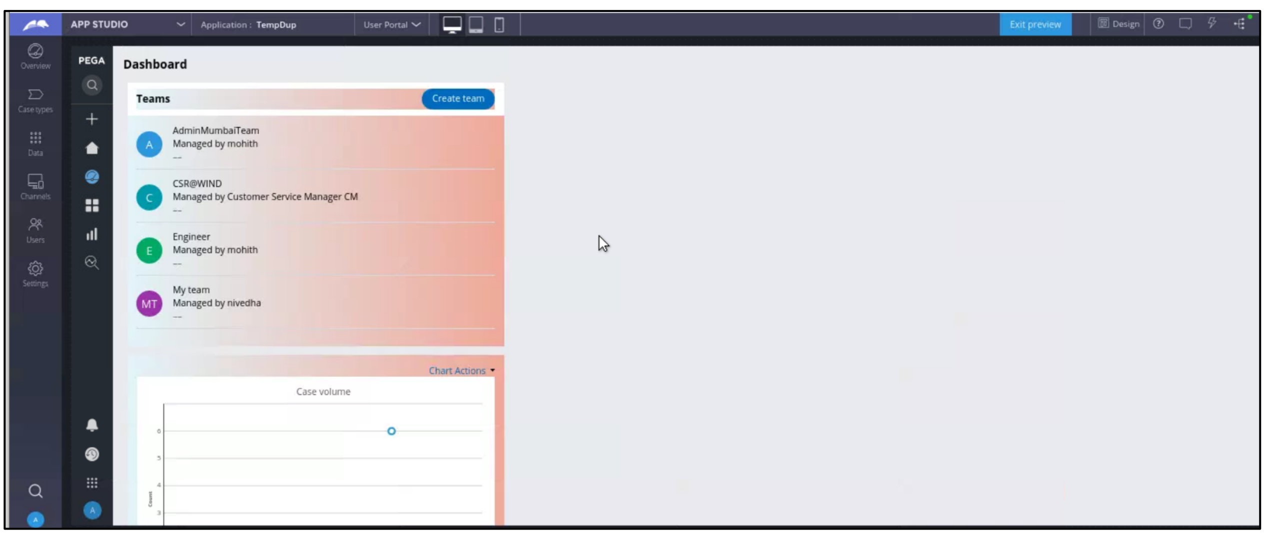
5. In the **Select a template** window, review the template preview and then select the template that you want to use. The template previews include the numbers, sizes, and relative positions of slots that they contain. For this example, select **Reversed.**



6. You will see the following:



7. Since we are just testing the impact of changing templates on the appearance, click **Publish**.

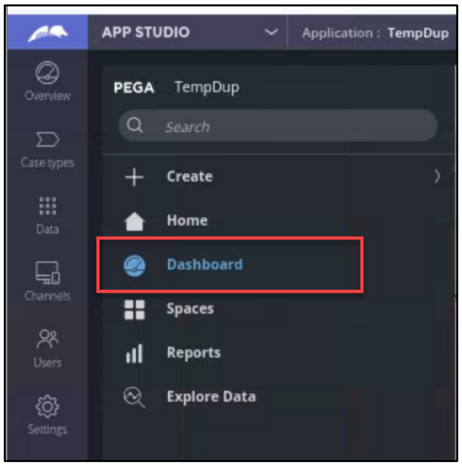


NOTE: Users see an updated version of the dashboard when they log on to your application. As a team manager, you can publish your dashboard to share it with your team. By providing a baseline layout with commonly used tools, you can help team members save time while they set up their environment.

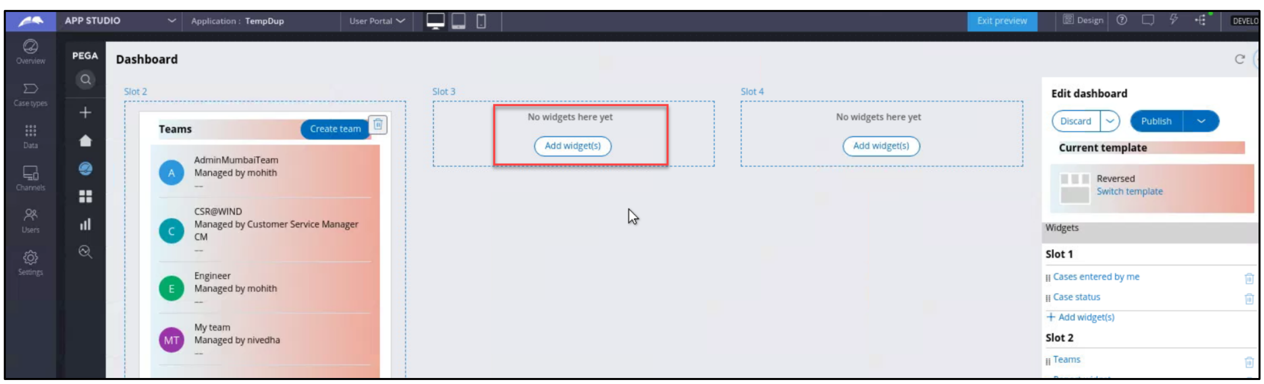
Task 4: Add a widget to the dashboard

Increase the productivity of your team by personalizing the dashboard with widgets that display relevant information. For example, you can design a workspace that includes a widget for frequently used reports to help managers save time and oversee their projects.

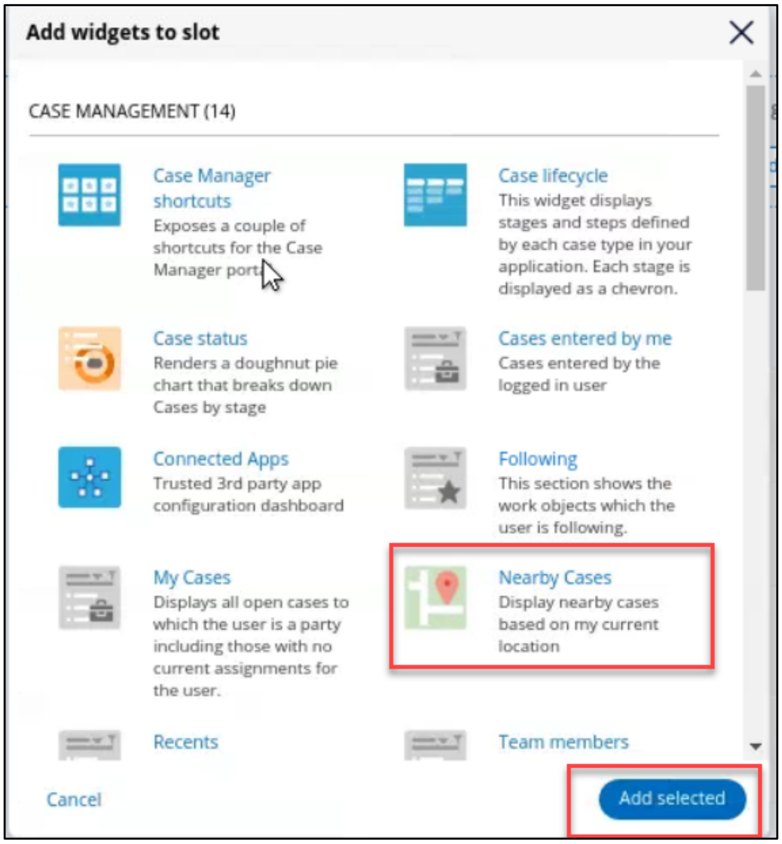
1. If you are not in the (User portal) **Dashboard** already then in the navigation menu of User Portal, click **Dashboard**.



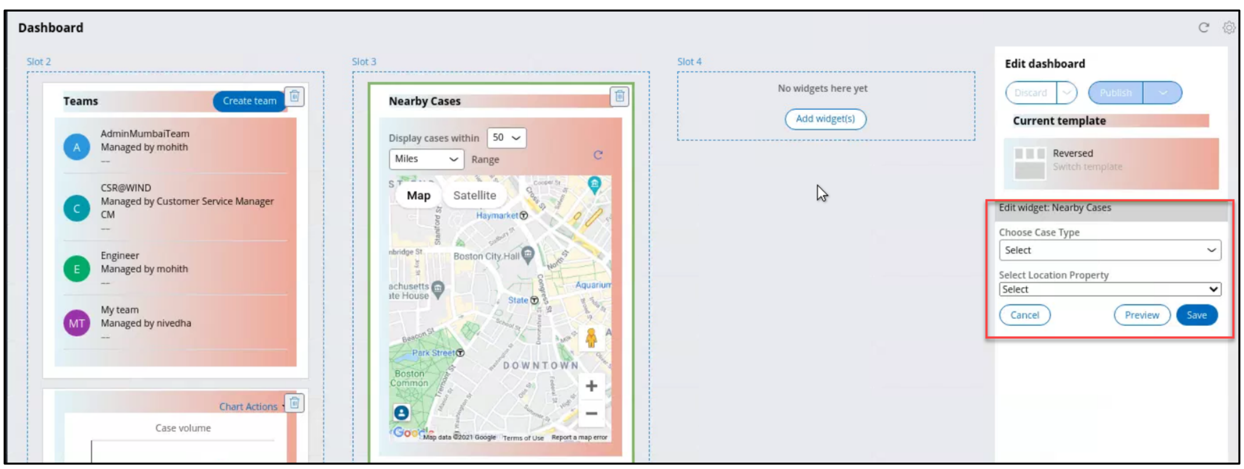
2. In the upper-right corner of the workspace, click the personalize icon in the **Dashboard**.
3. In the slot where you want to position the widget, click **Add widget**.



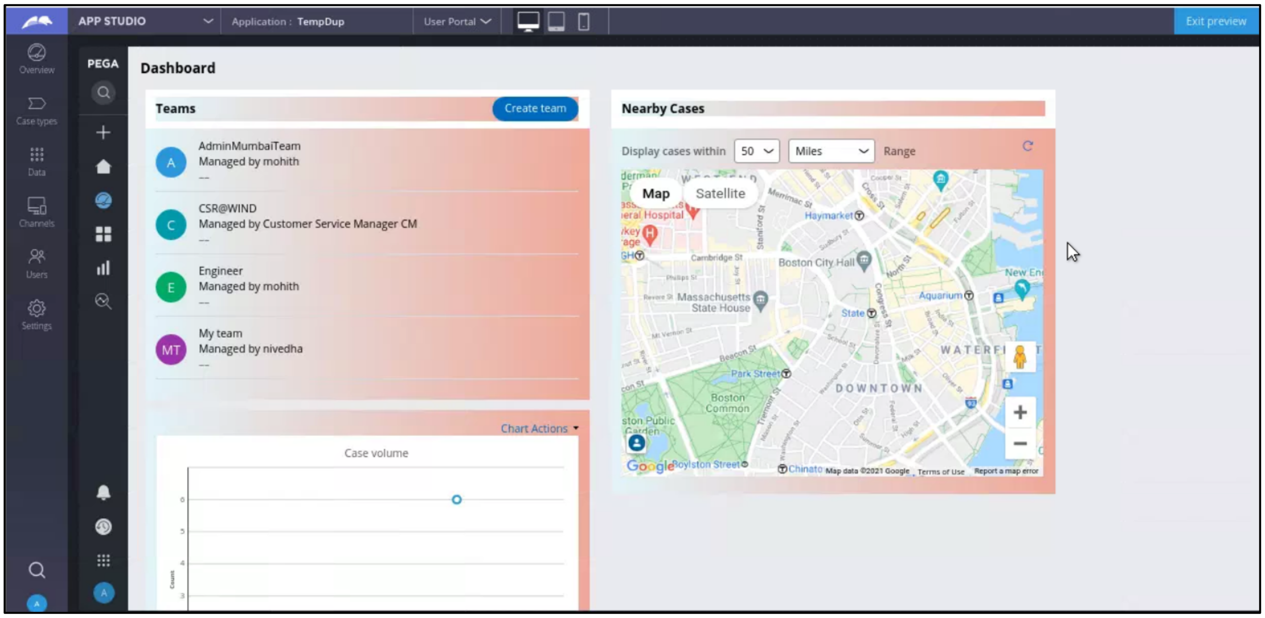
4. In the **Add widgets to slot** window, select one or more widgets that you want to add to the slot, and then click **Add selected**. Select **Nearby cases** and then click **Add Selected**.



5. In the work area, select the newly added widget, and then determine if there are additional options to configure.



6. Click **Publish**.


APP STUDIO
Application : TempDup
User Portal
Exit preview
Overview
Case types
Data
Channels
Users
Settings
PEGA
Dashboard
Teams
Create team
AdminMumbaiTeam
Managed by mohith
CSR@WIND
Managed by Customer Service Manager CM
Engineer
Managed by mohith
My team
Managed by nivedha
Chart Actions
Case volume
Nearby Cases
Display cases within
50
Miles
Range
Map
Satellite
Boston City Hall
Massachusetts State House
DOWNTOWN
Boston Common

7. **Log off**.

Reporting

Manager runs a standard report

Scenario

A manager at the company will want to be able to run out-of-the-box reports from the system. Run a report.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Manager	Ray@reportbrowser	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Navigate to the Reports Browser

Navigate to the Reports Browser and select a report.

Task 2: Investigate the report

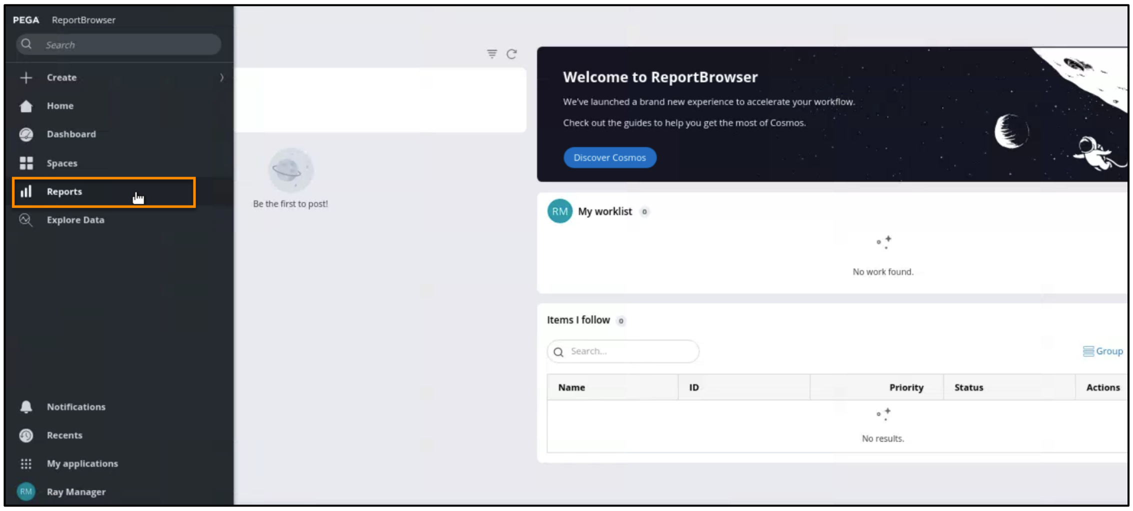
Investigate the report.

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

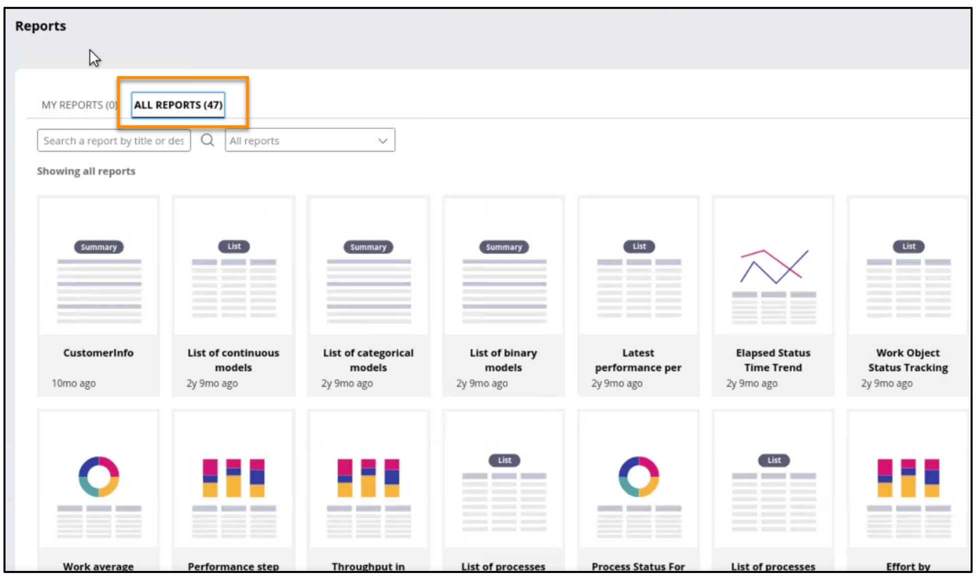
Detailed Steps

Task 1: Navigate to the Reports Browser

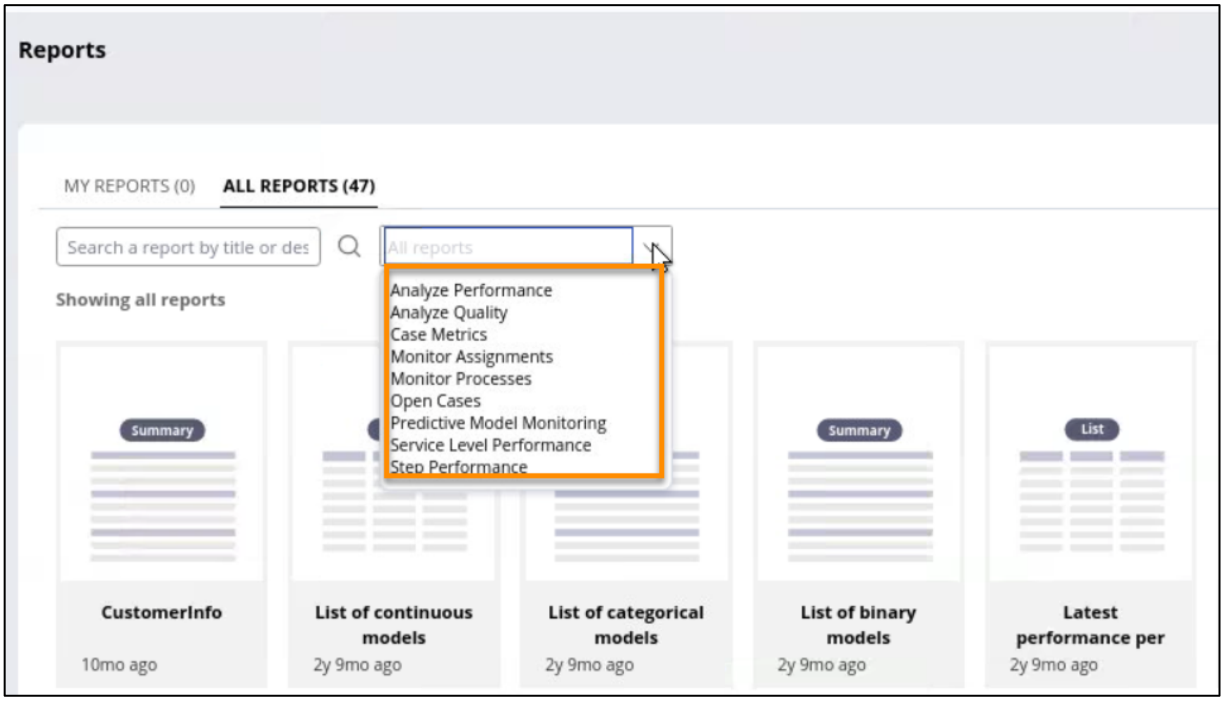
1. Open a browser.
2. Log in and use the credentials **ray@reportbrowser** and **rules**.
3. In the left-hand navigation pane select **Reports**.



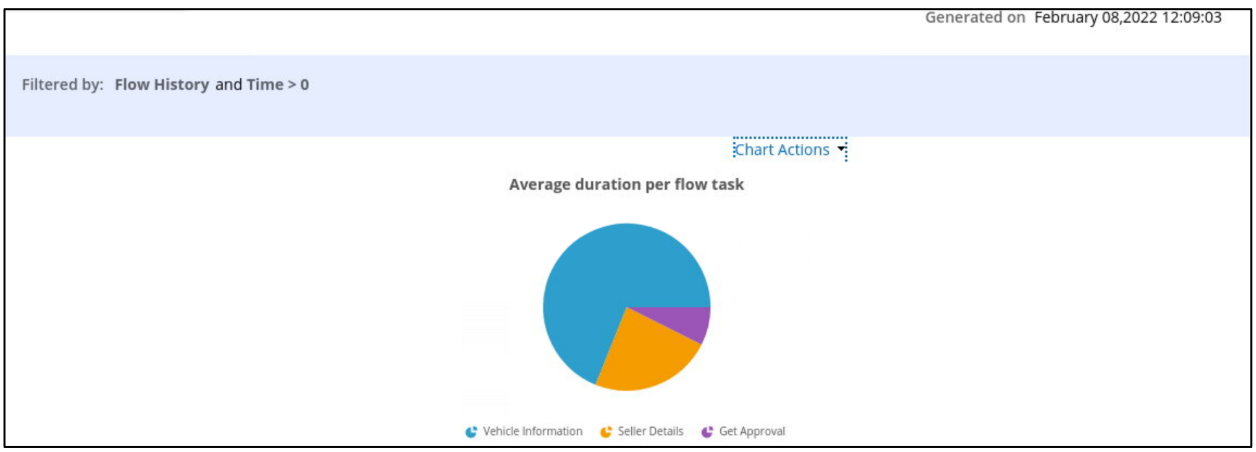
4. Since you don't have any reports in **My Reports** yet, click on **All Reports** to find a standard report.



5. Click the drop-down and review the available categories.



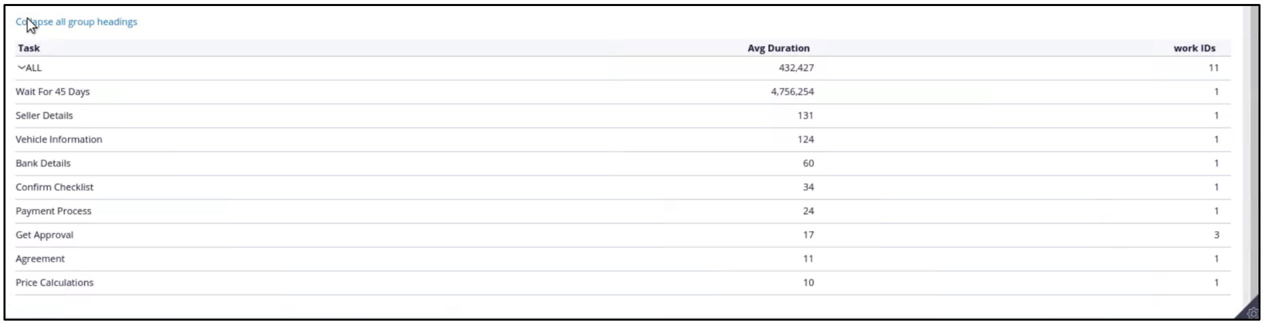
6. Select **Analyze Performance** and then select the summary type report available in the category called **Average duration per flow task**.



NOTE: The report you run may look different depending on the case activity in your unique student environment before running the report. If you create more Sell Vehicle cases after running this report and then come back to this report you will see the report will have changed based on the current performance information in the system.

Task 2: Investigate the report

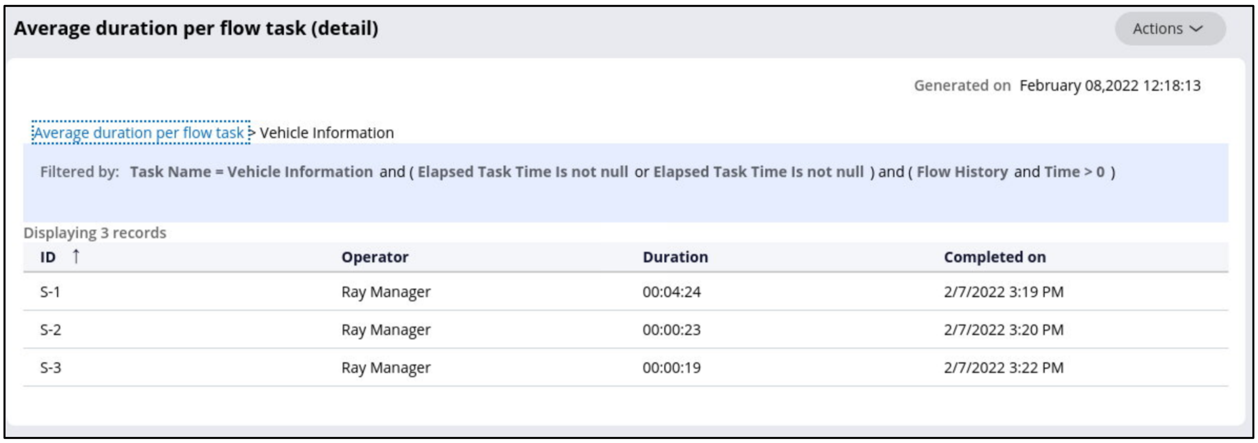
1. See the list of flow tasks and their duration.



Collapse all group headings

Task	Avg Duration	work IDs
ALL	432,427	11
Wait For 45 Days	4,756,254	1
Seller Details	131	1
Vehicle Information	124	1
Bank Details	60	1
Confirm Checklist	34	1
Payment Process	24	1
Get Approval	17	3
Agreement	11	1
Price Calculations	10	1

2. Click on one of the rows to drill down to task information which is presented as a LIST type report.



Average duration per flow task (detail)

Actions

Generated on February 08,2022 12:18:13

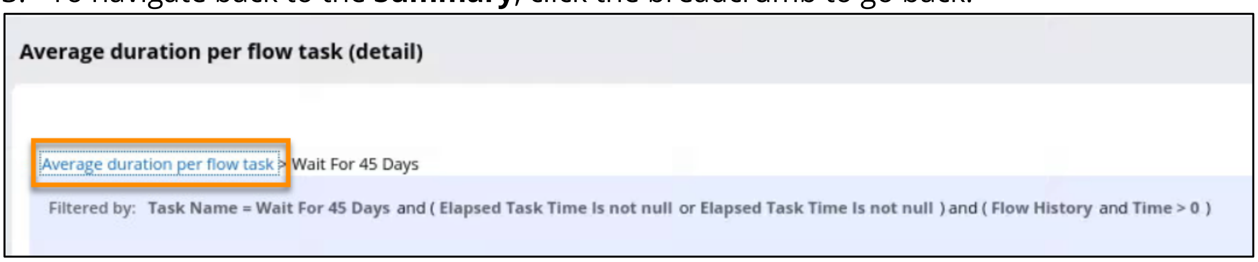
Average duration per flow task > Vehicle Information

Filtered by: Task Name = Vehicle Information and (Elapsed Task Time Is not null or Elapsed Task Time Is not null) and (Flow History and Time > 0)

Displaying 3 records

ID	Operator	Duration	Completed on
S-1	Ray Manager	00:04:24	2/7/2022 3:19 PM
S-2	Ray Manager	00:00:23	2/7/2022 3:20 PM
S-3	Ray Manager	00:00:19	2/7/2022 3:22 PM

3. To navigate back to the **Summary**, click the breadcrumb to go back.



4. **Log off**.

Manager creates a new report

Scenario

Pega allows for Managers to create ad hoc reports for themselves. Ray the manager wants to create a report of Sell Vehicle cases.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Manager	Ray@reportbrowser	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Navigate to the Reports Browser

Navigate to the Reports Browser and select a report.

Task 2: Create a new report

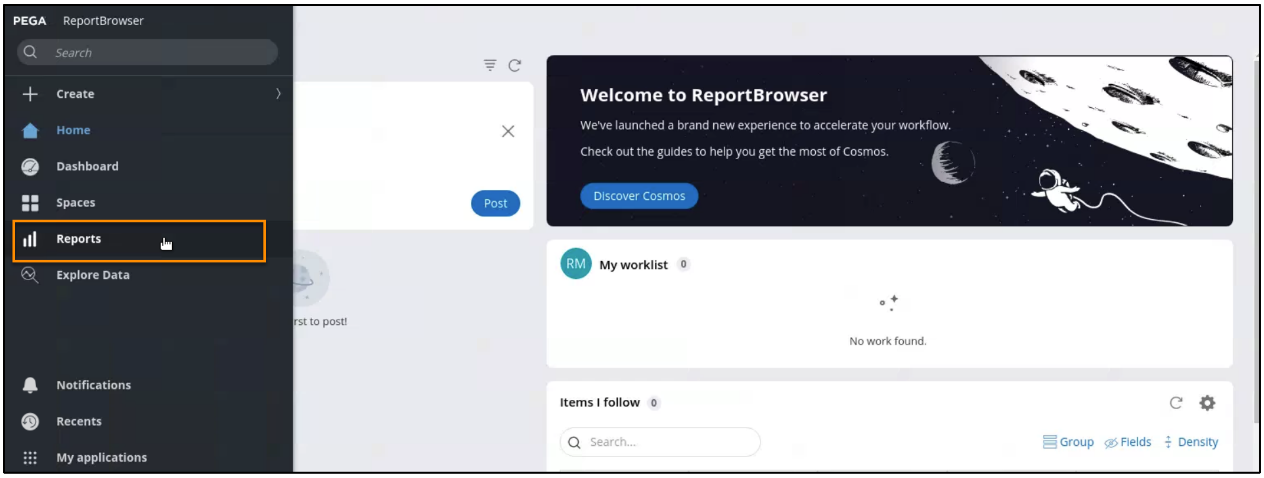
Create a new report.

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

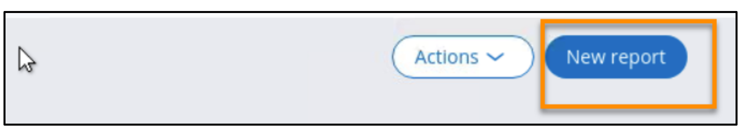
Task 1: Navigate to the Reports Browser

1. Open a browser.
2. Log in and use the credentials **ray@reportbrowser** and ***rules***.
3. In the left-hand navigation pane select **Reports**.



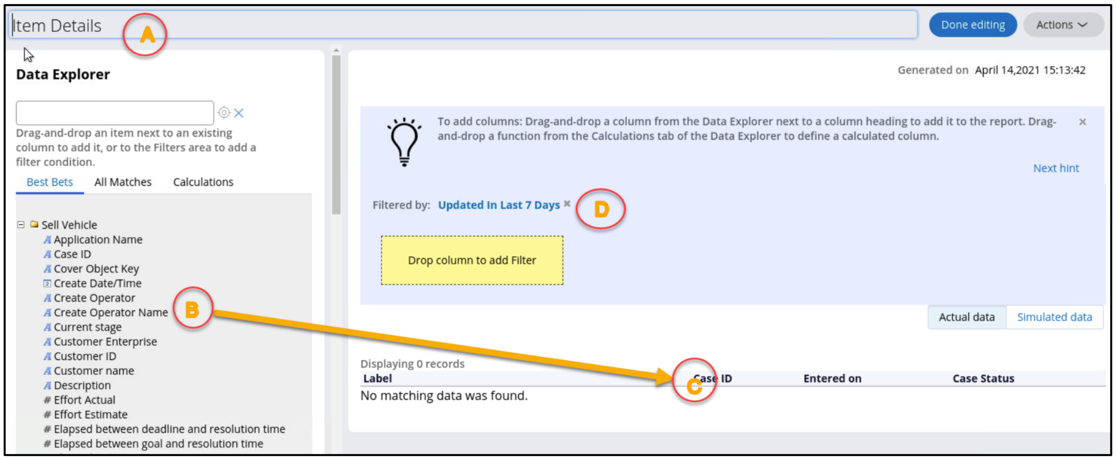
Task 2: Create a new report

1. Click the **New Report** button in the report browser to create a new report.

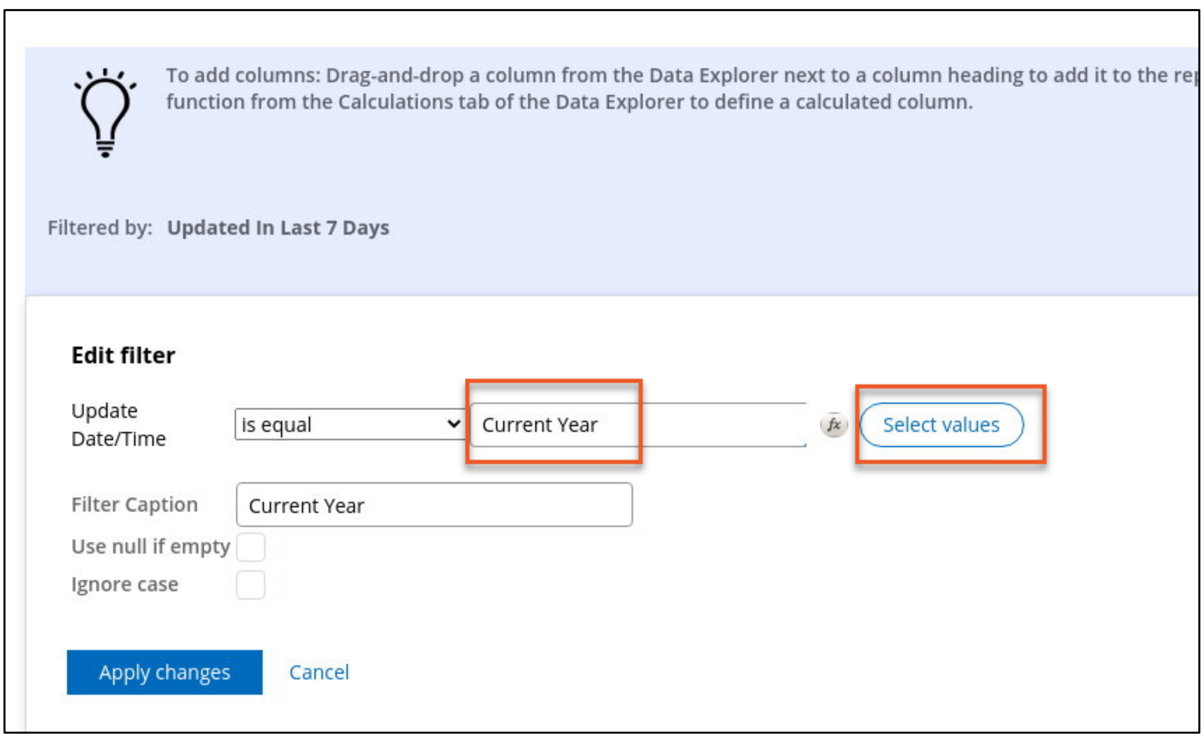


2. The **Create new report** dialogue will appear. Select the case type **Sell Vehicle**. Select List as the **Report type.** Click **Submit** to close the dialogue.

3. The data explorer will appear.
    a. Change the title from **Item Details** to **Sell Vehicle Cases in 2022.**
    b. Select and drag the **Create Operator Name** property to the column location between **Label** and **Case ID.**

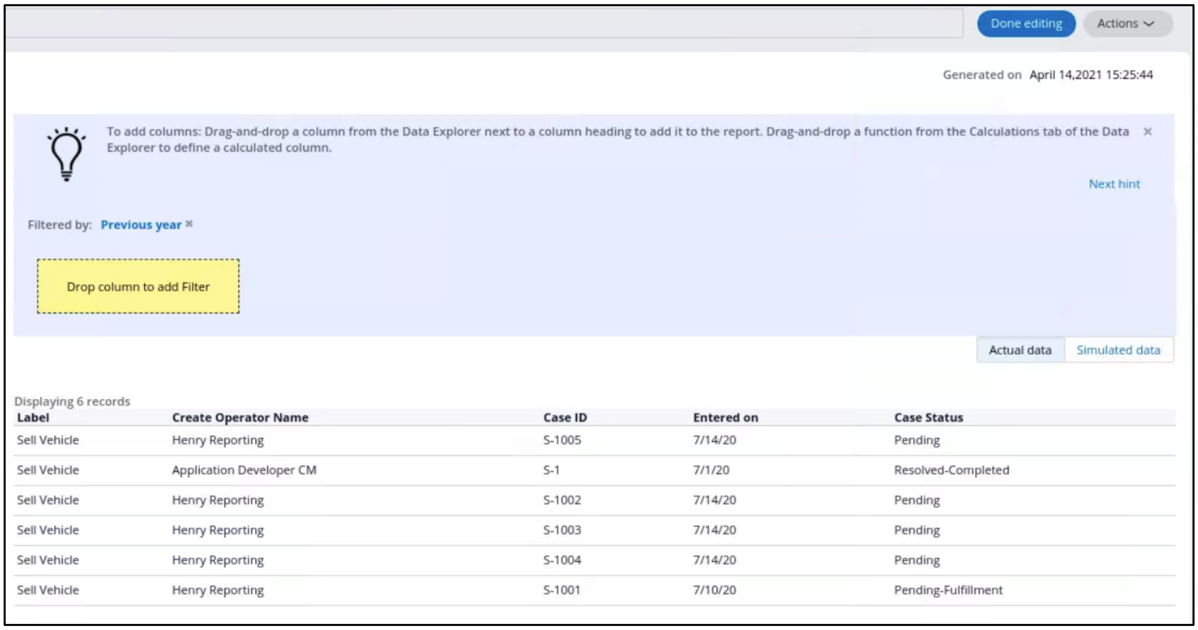


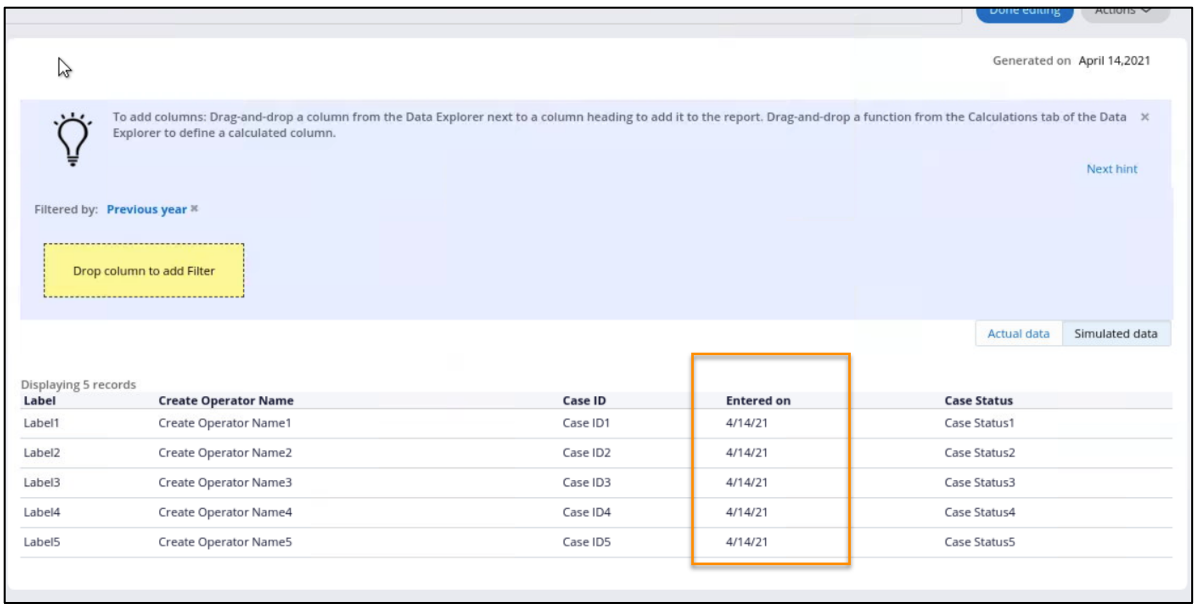
    c. Modify the filter **Updated in the Last 7 Days** to **Current Year**. See the available symbolic indexes by clicking **Select Values** and selecting **Current Year.** Update the filter caption to **Current Year.**



    d. Click **Apply Changes**.

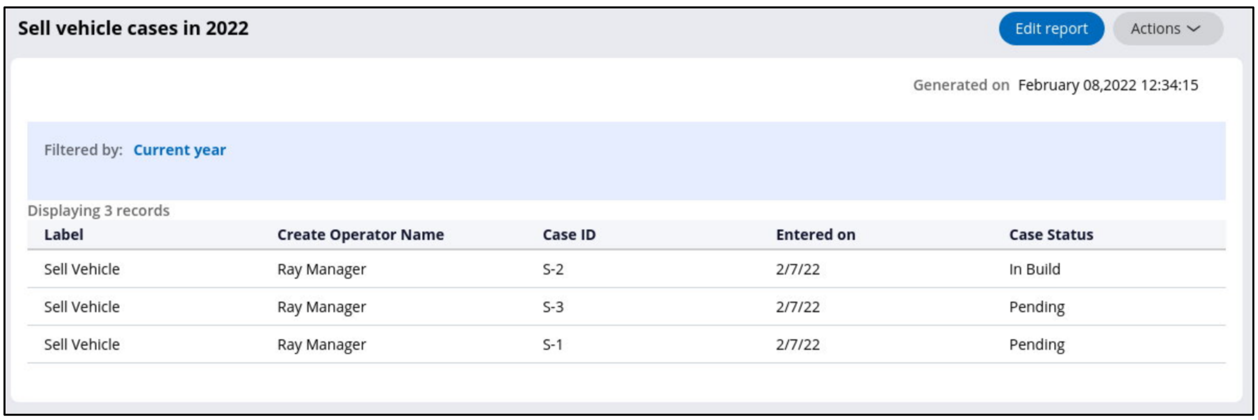
4. Before clicking **Done editing** confirm the report looks similar to the picture below. If you do not have **Actual Data**, click the **Simulated data** button instead.





5. Click **Done Editing** to save the report in **My Reports.** Click **Submit** to save the report.

6. The saved report will be visible on the screen. After reviewing the report, click the **x** next to the **Actions** button to close the report.

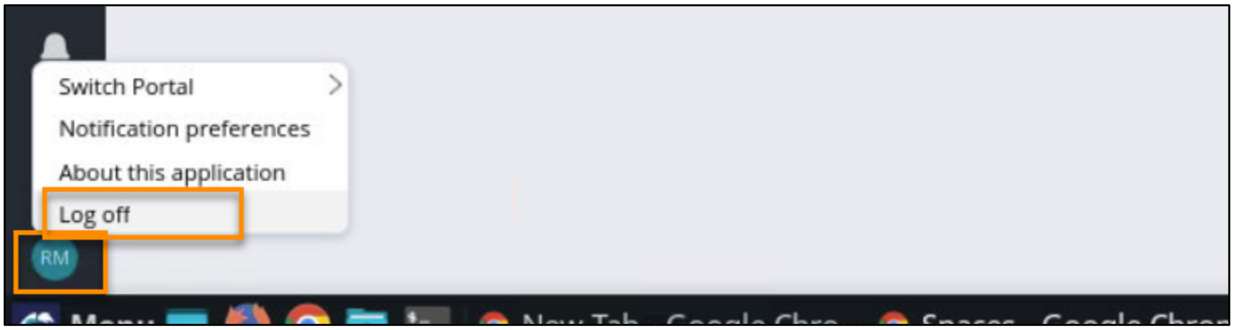


Tip: An alternate way to close the report is to click on **Reports** from the left navigation to view the report browser.

7. The report browser will now show a report in the **My Reports** tab.

If the report does not appear under My Reports initially, log off and then log back in.

8. Bottom left of the screen, click the operator icon and click on **Log off**.



Security

Inviting a user to the application

Scenario

The application under development requires operators to test some of the features and make appropriate changes.

To implement this requirement, you will need to invite new users to access the application. To complete the task, a persona, access rights will also need to be configured.

Use the following credentials to log in to the exercise system:

Role	Username	Password
Administrator Engineer	AdminInviteUsers@auto	rules

Your Assignment

Your assignment consists of the following tasks:

Task 1: Login and enable branch development

Task 2: Configure persona and access

As an Administrator Engineer operator, create and configure personas.

Task 3: Invite new users to the application

As an Administrator Engineer operator, invite a new user.

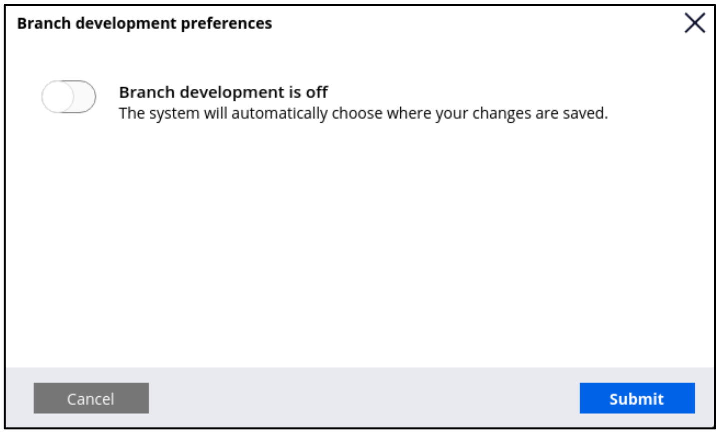
Task 4: Test the users

NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

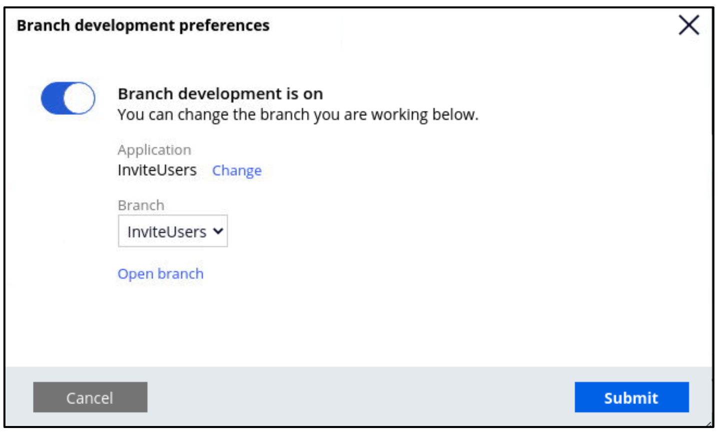
Detailed Steps

Task 1: Login and enable branch development

1. Login and use the credentials **AdminInviteUsers@auto** and **rules**. You are logged into Dev Studio.
2. From the title bar, click the **Toggle branch development**.
3. The **Branch development preferences** appear.



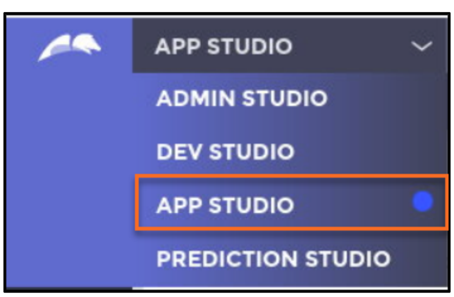
Move the slider to the right and ensure that the **InviteUsers** branch is selected.



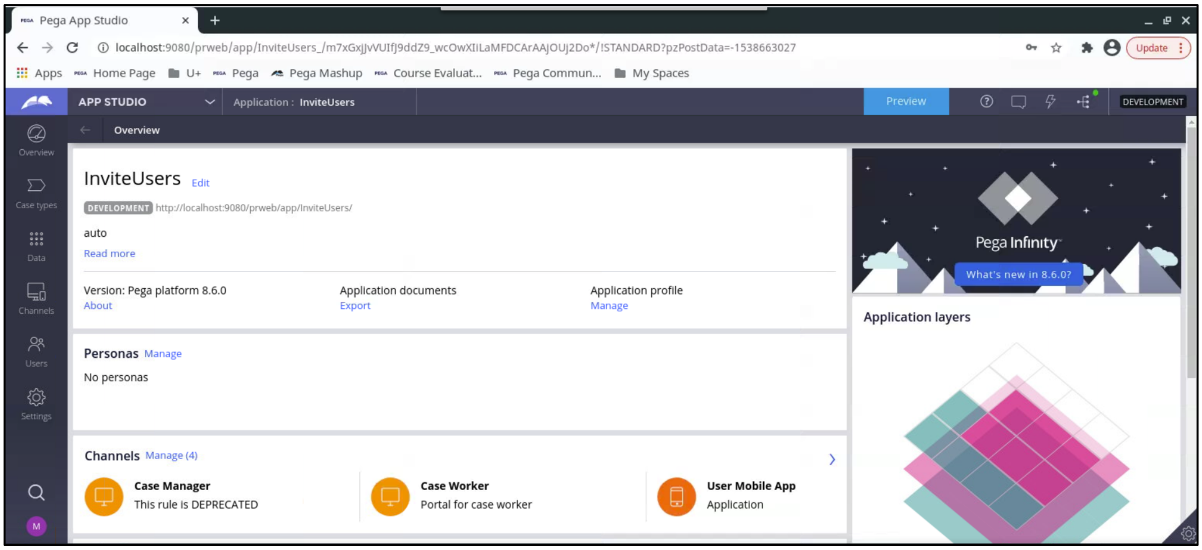
4. Click **Submit**.

Task 2: Configure persona and access

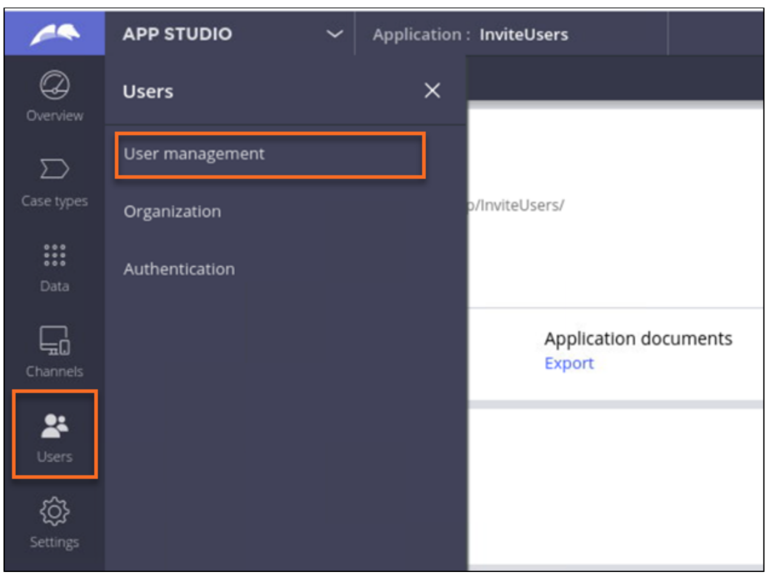
As an Administrator Engineer operator create two personas and configure access.



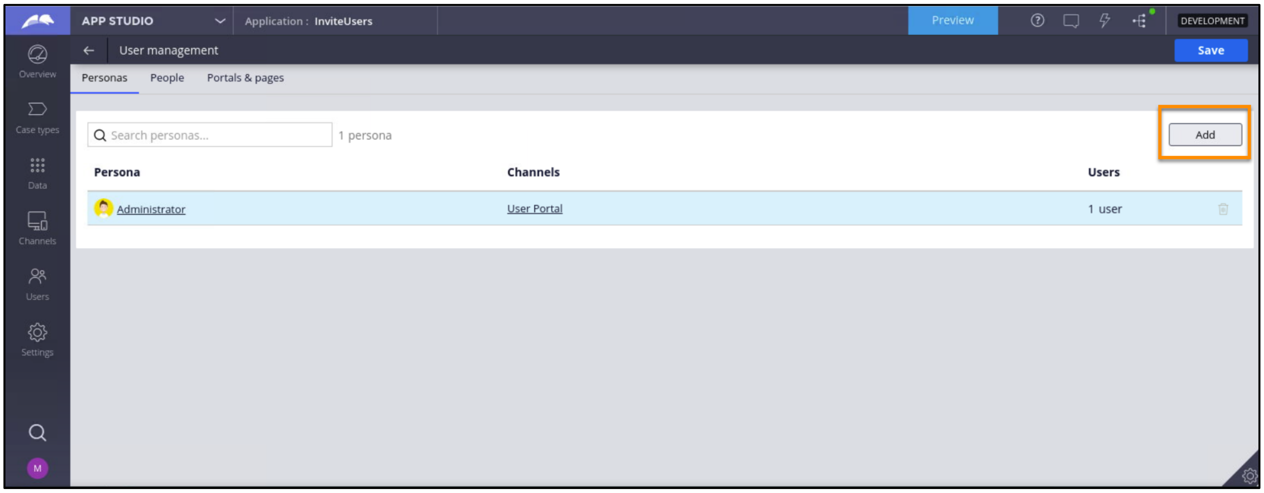
1. Click the **Start now** button on the **One journey at a time** window to the close the window.
2. Click **Close** on the **Success! Your Application is ready** window.



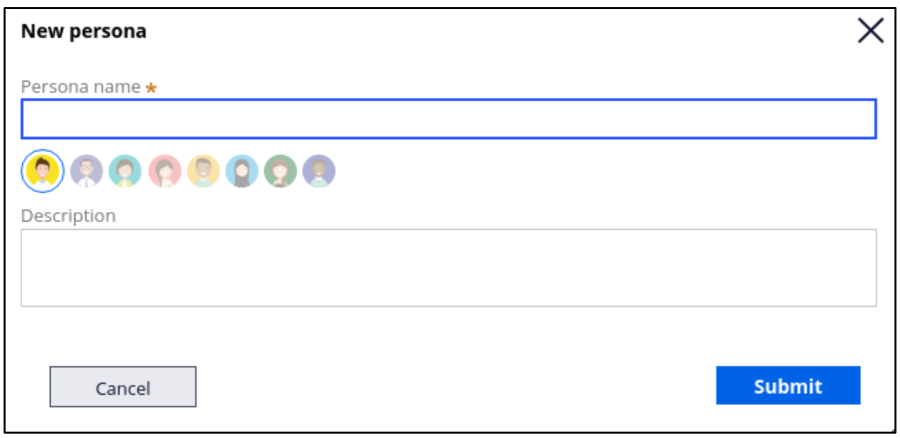
3. From the panel on the left select **Users > User management.**



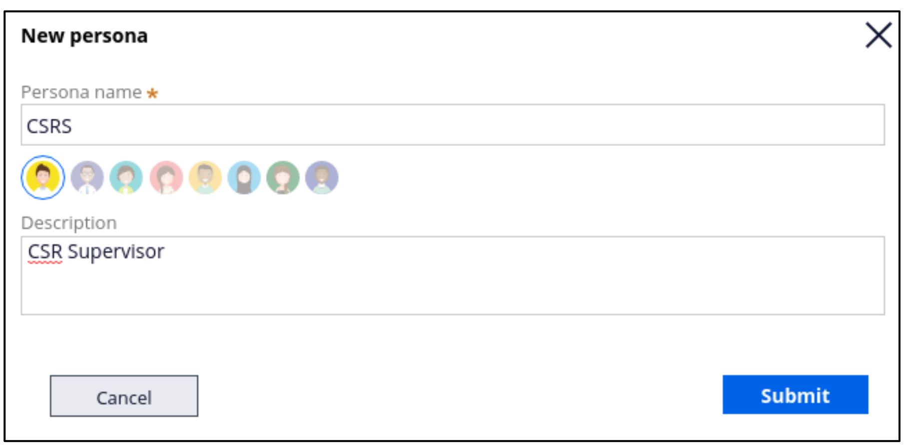
The following appears:



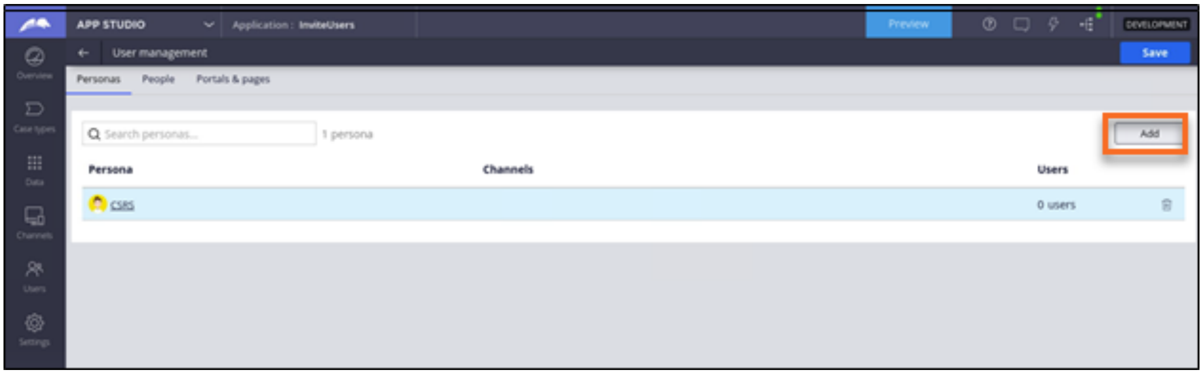
4. Click **Add**. The following appears:



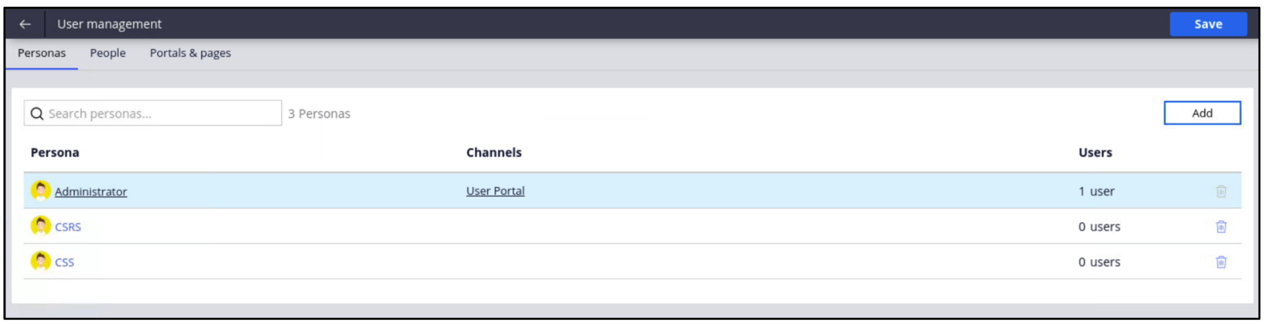
5. Enter **CSRS** for the **Persona name** and **CSR Supervisor** for the **Description**.



6. Click **Submit**. The new persona appears.



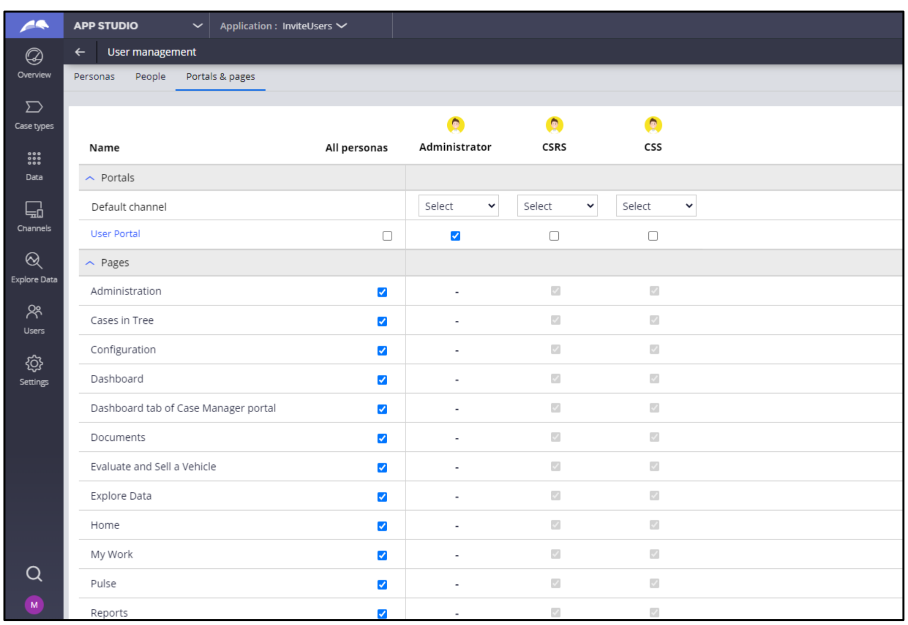
7. Click **Add** button and add a second persona named **CSS** with a **Description** set to **Customer Self-Service**. The following appears:



8. Click the left arrow before **User management** to return to the overview window.

9. Select **Users > User management** and then click on **Portals & pages** tab.

10. The following appears:



11. For CSRS set the **Default channel** as **User Portal**.

12. For CSS set the **Default channel** to **User Portal**.

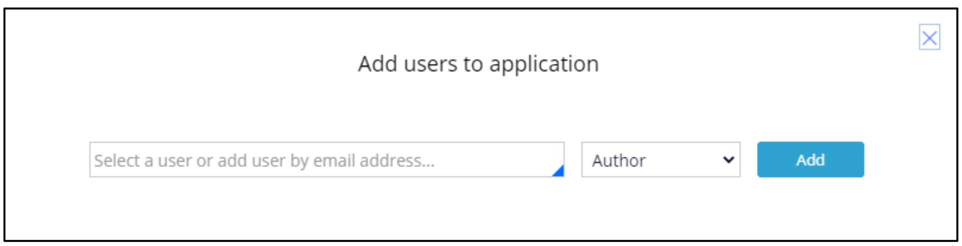
13. Scroll to the top of the window and click **Save**.

Task 3: Invite new users to the application

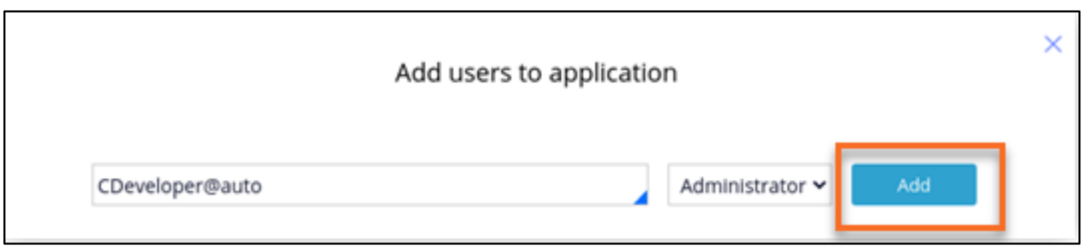
As an Administrator Engineer operator invite two users to the application.

1. Select **Users > User management** and then click on the **People** tab. The following appears:

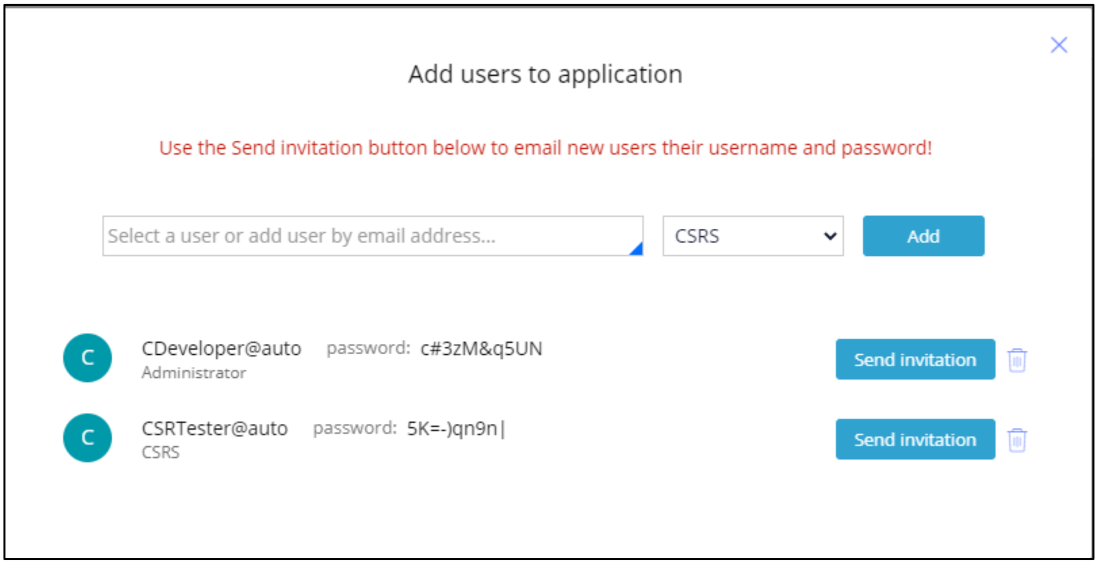
2. Click **Invite people to your application link**. The following appears:



3. Enter **CDeveloper@auto** for the email address and select **Administrator** in the drop-down next to the field. **Click Add**.



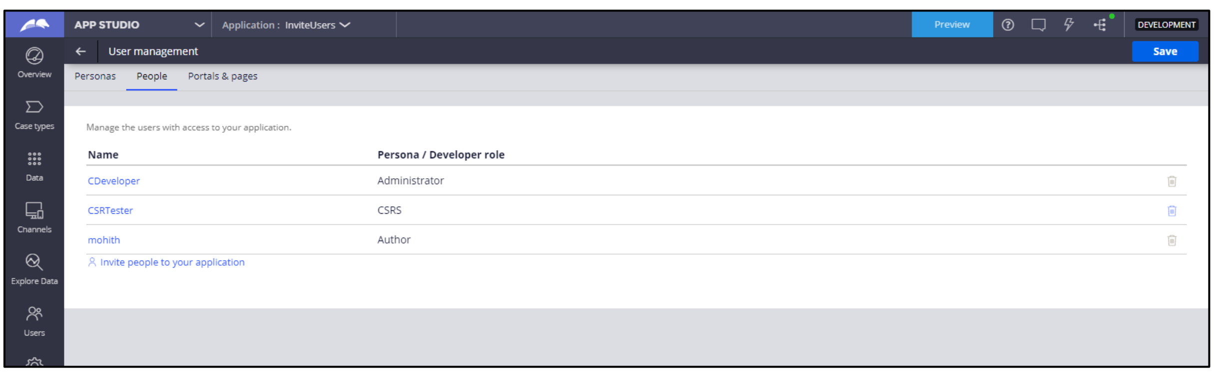
4. Enter another email address **CSRTester@auto** and select the persona **CSRS. Click Add** button.



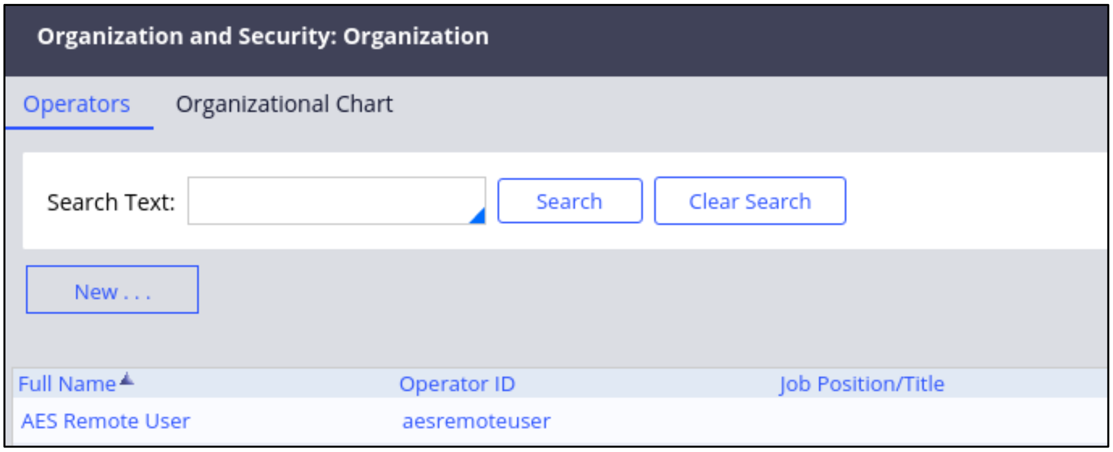
5. Click **Send Invitation** for each to send an email invitation to access the system.

> **NOTE**: This will send an email invite with a default password for the invited user to use to allow them to update their password. In the rest of the exercise we update the user password for them.

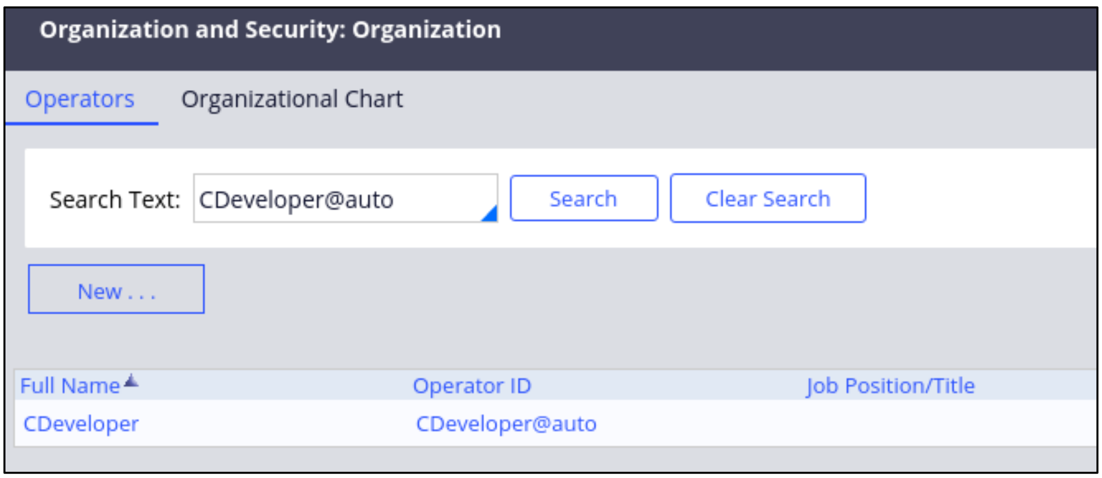
6. Click the **X** in the top right to close the window.



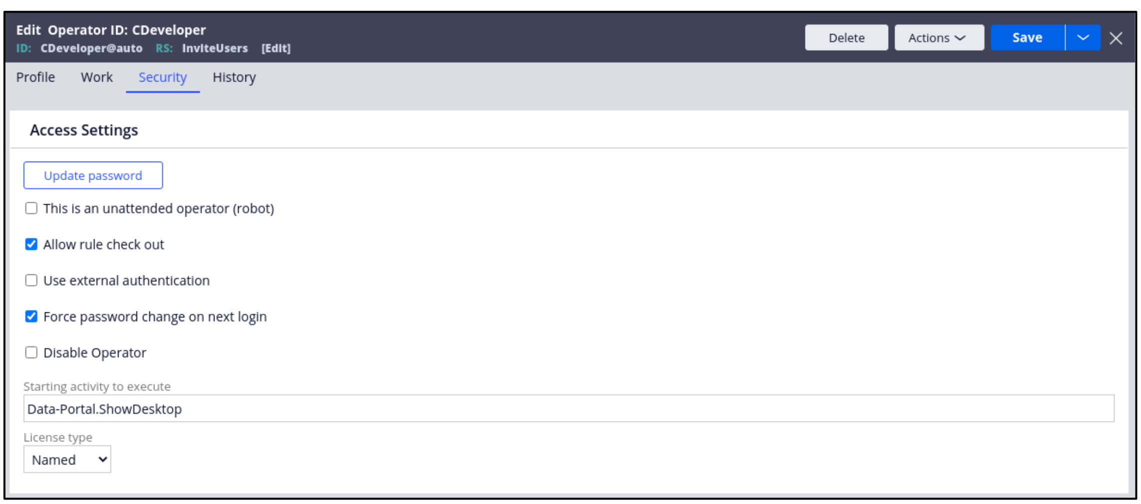
7. From the title bar, select **Dev Studio** to switch to Dev Studio.
8. Select **Configure > Org & Security > Organization > Operators**. The following appears:



9. In the **Search Text** field, enter **CDeveloper@auto** and click **Search**. The user is located.



10. Click the row to open the **Operator** record and select the **Security** tab.



11. Clear the **Force password change on next login** checkbox. **Save**.

12. Click the **Update password button** and enter a new password set to **rules**. Click **Submit**.

13. Click **Save** to save the changes.

14. Repeat steps 8 to 13 to update the user **CSRTester@auto**.

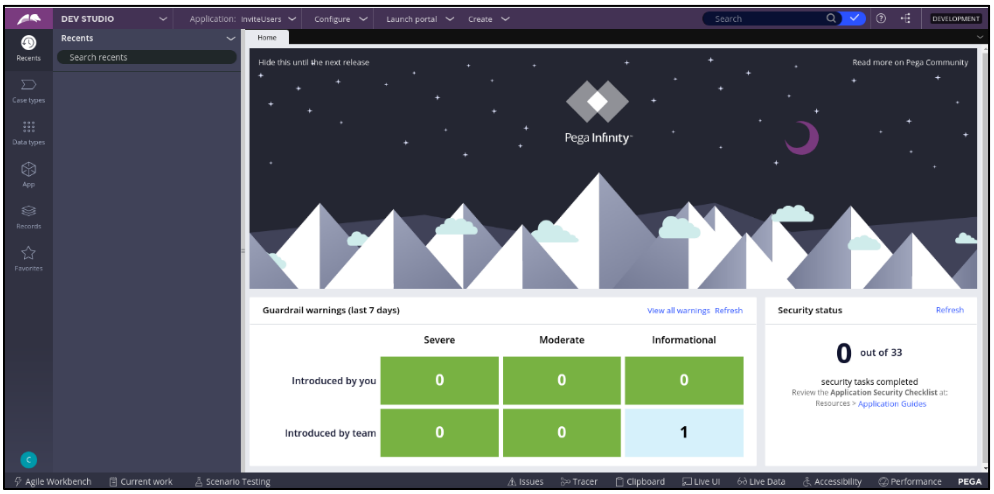
15. **Log off**.

Task 4: Test the users

As the new login to access the application.

1. Log in and use the credentials **CDeveloper@auto** and **rules**.

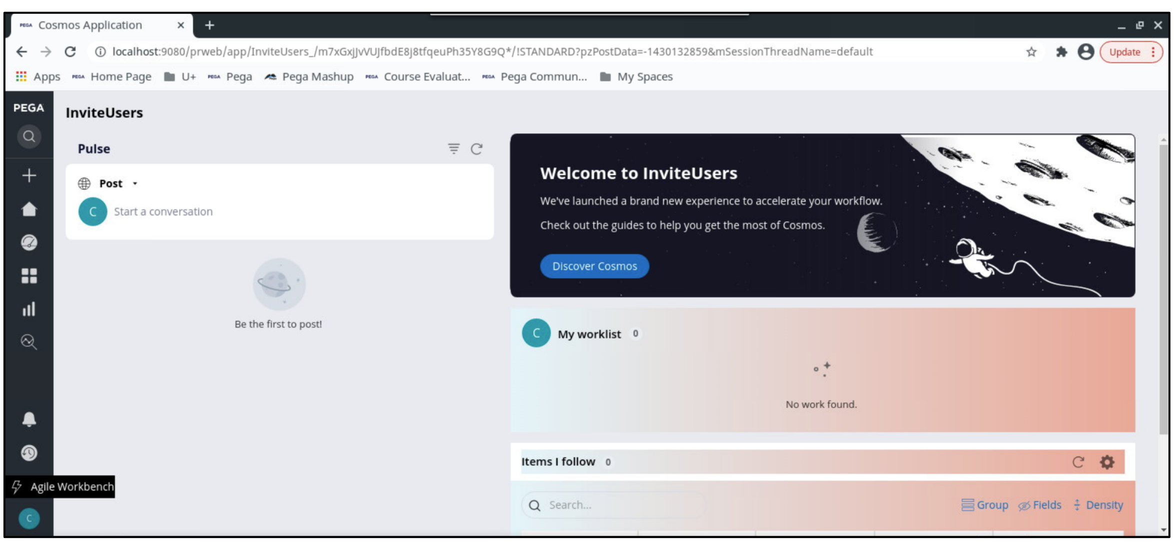
   You are logged into Dev Studio.



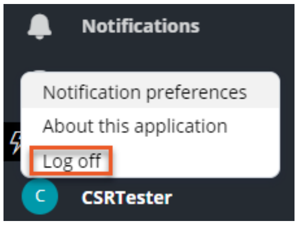
2. **Log out**.

3. **Log in** and use the credentials **CSRTester@auto** and **rules**.

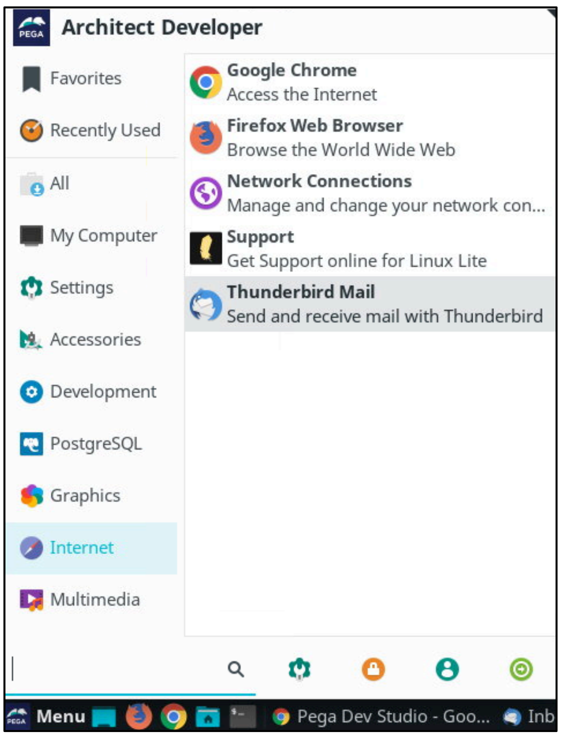
4. You are logged into the Case Manager portal.

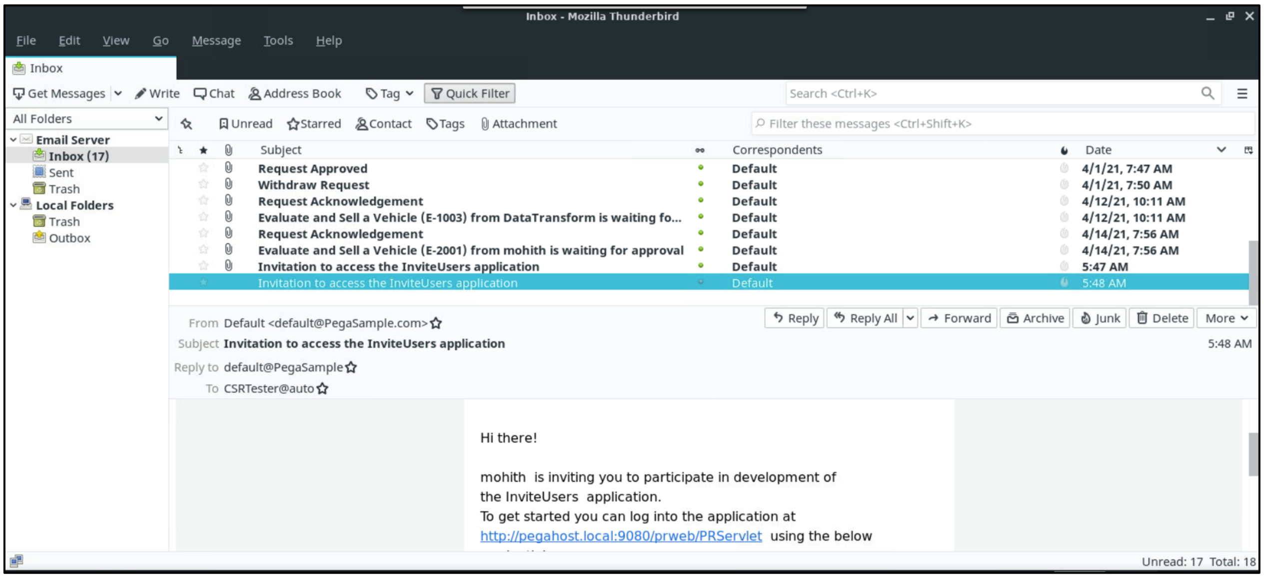


5. **Log out**.



NOTE: After inviting a user to the application an email is auto-generated with a secure password. To check this, go to your system Menu > Internet > Thunderbird to review the emails and passwords. For this exercise, we disabled forcing the password reset option and simplified the password to “rules” for ease of the exercise. When implementing with a client, depending on the situation, you’d most likely leave the box checked to force the password reset option and each Operator would have their password.




Inbox - Mozilla Thunderbird
File Edit View Go Message Tools Help
Inbox
Get Messages
Write
Chat
Address Book
Tag
Quick Filter
Search <Ctrl+K>
All Folders
Unread
Starred
Contact
Tags
Attachment
Filter these messages <Ctrl+Shift+K>
Email Server
Inbox (17)
Sent
Trash
Local Folders
Trash
Outbox
Subject
Correspondents
Date
Request Approved Default 4/1/21, 7:47 AM
Withdraw Request Default 4/1/21, 7:50 AM
Request Acknowledgement Default 4/12/21, 10:11 AM
Evaluate and Sell a Vehicle (E-1003) from DataTransform is waiting fo... Default 4/12/21, 10:11 AM
Request Acknowledgement Default 4/14/21, 7:56 AM
Evaluate and Sell a Vehicle (E-2001) from mohith is waiting for approval Default 4/14/21, 7:56 AM
Invitation to access the InviteUsers application Default 5:47 AM
Invitation to access the InviteUsers application Default 5:48 AM
Reply
Reply All
Forward
Archive
Junk
Delete
More
From Default <default@PegaSample.com>
Subject Invitation to access the InviteUsers application
5:48 AM
Reply to default@PegaSample
To CSRTester@auto
Hi there!
mohith is inviting you to participate in development of
the InviteUsers application.
To get started you can log into the application at
http://pegahost.local:9080/prweb/PRServlet using the below
Unread: 17 Total: 18