

PEGA PLATFORM



Pega Enablement

Business Architect Essentials

8.7 GA

Exercise Guide

SKILL

BUILD
FOR
CHANGE



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.

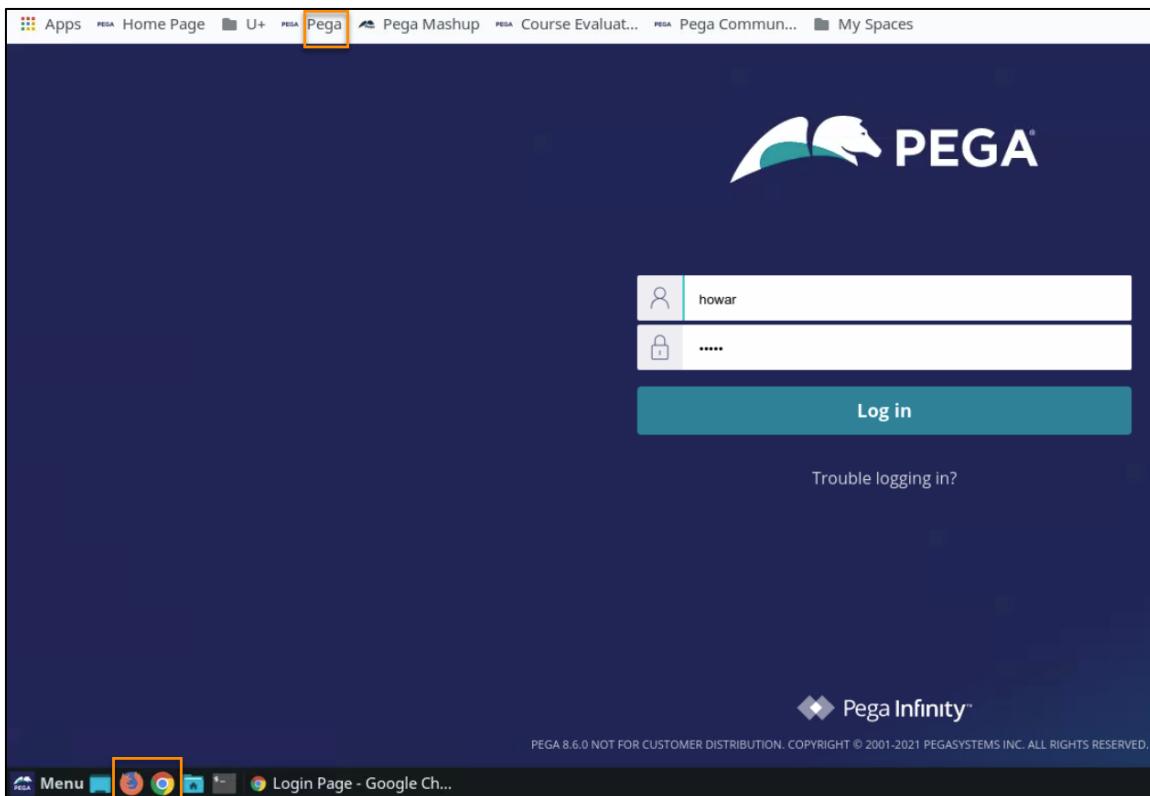
Detailed Steps

Task 1: Start a new Job Applicant case

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

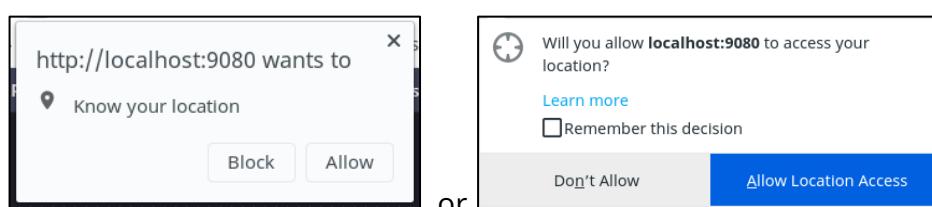
NOTE: Chrome and Firefox are available in the classroom virtual lab environment. The default Pega login screen is also available as a shortcut.

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

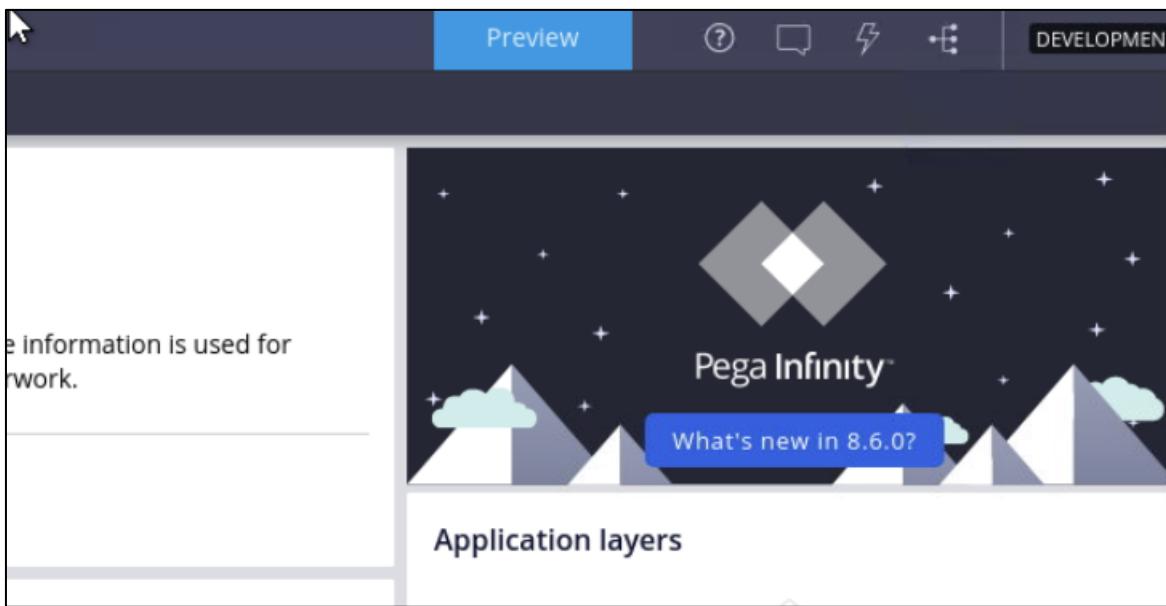


2. Log in and use the credentials **howar** and **rules**. The following appears:

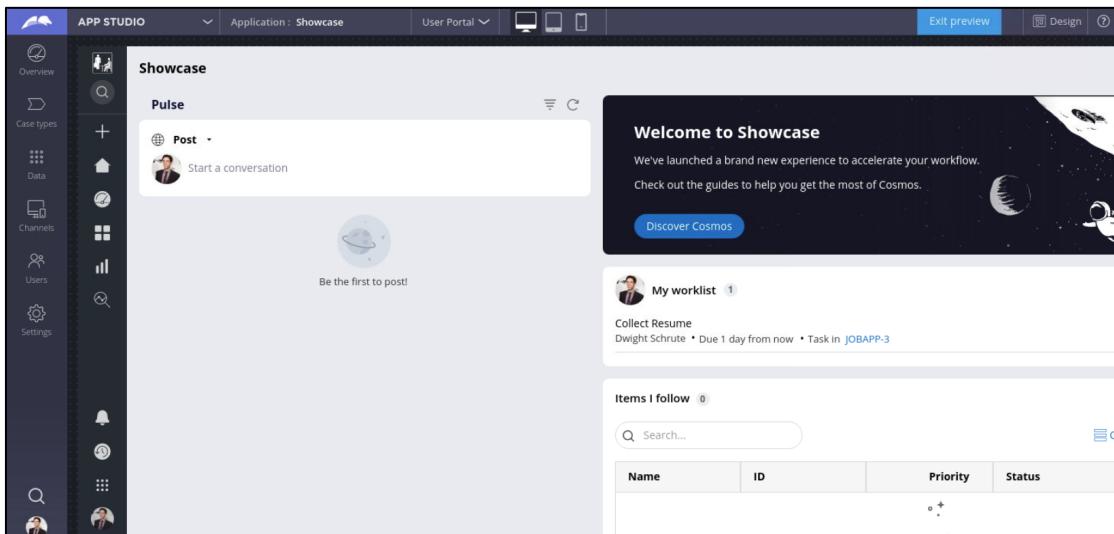
3. Chrome or Firefox may want to track your location. When the location access dialog appears for Chrome, click **Allow**. For Firefox, click **Allow Location Access**.



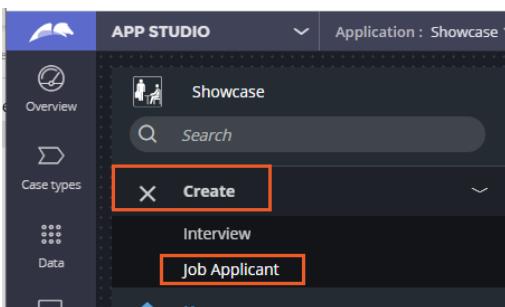
4. Click the **Preview** application button on the title bar.



5. The following appears:



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



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

The screenshot shows a recruitment software interface. On the left, there's a sidebar with icons for creating a new candidate, priority levels (Priority 10), status (Status: NEW, Created by Ryan Howard less than a minute ago, Updated by Ryan Howard less than a minute ago), and details (Pulse). The main area has a header "Collect Resume" with a due date of "Due 2 days from now". It includes sections for "Personal Information" (First Name: Dwight, Last Name: Schrute, Phone: 555-123-4567, Email: Dwight.Schrute@beets.com) and "Job Posting" (Title: Account Manager). To the right is a world map showing the location of Schrute Farms, Scranton, PA. A note at the bottom says: "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.

This screenshot shows the same resume collection form as above, but with a focus on the "Skills" field. The "Skills" dropdown is open, showing items: Java, Karate, Leadership, Sales, and German. The "German" option is highlighted with a red box. The rest of the form and map are visible in the background.

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

Dwight	Schrute Farms, Scranton, PA
Last Name	Schrute
Phone	555-123-4567
Email	Dwight.Schrute@beets.com
Skills	Java X Karate X Leadership X Sales X German X
Job Posting	
Title	Account Manager
Description	Entry level paper sales
Department	Sales

A map of Honesdale, Pennsylvania, showing the location of Schrute Farms. The map includes Main St, High St, Park St, West St, 13th St, 12th St, Church St, and Irving Cliff. The Schrute Farms property is marked with a red pin. The map also shows the Wayne County Courthouse, The Stourbridge Line Train Excursions, and the Susquehanna River.

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

J-38015

Dwight Schrute

[Edit](#) [Actions](#)

Priority
10

Status **NEW**

Created Ryan Howard less than a minute ago

Updated Ryan Howard less than a minute ago

Details

Pulse

Collect Resume
Due 2 days from now

Personal Information

First Name
Dwight

Leave blank

Account Manager
Sales; Entry level paper sales

Sales Manager
Sales; Sales manager for North East

Benefits Manager
Human Resources; Benefits Manager for new employees

Data Analyst
Accounting; Entry level data analyst

Payroll Manager
Accounting; Manager the payroll at Scranton Office

Description
Entry level paper sales

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

J-38015

Dwight Schrute

Edit Actions ▾

Priority
10

Status **NEW**

Created Ryan Howard less than a minute ago

Updated Ryan Howard less than a minute ago

Details

Pulse

Last Name
Schrute

Phone
555-123-4567

Email
Dwight.Schrute@beets.com

Skills
Java X Karate X Leadership X Sales X German X

Job Posting

Title
Data Analyst

Description
Entry level data analyst

Department
Accounting

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

Personal Information

First Name
Dwight

Last Name
Schrute

Phone
555-123-4567

Email
Dwight.Schrute@beets.com

Skills
Java X Karate X Leadership X Sales X German X

Job Posting

Title
Data Analyst

Description
Entry level data analyst

Department
Accounting

Map

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

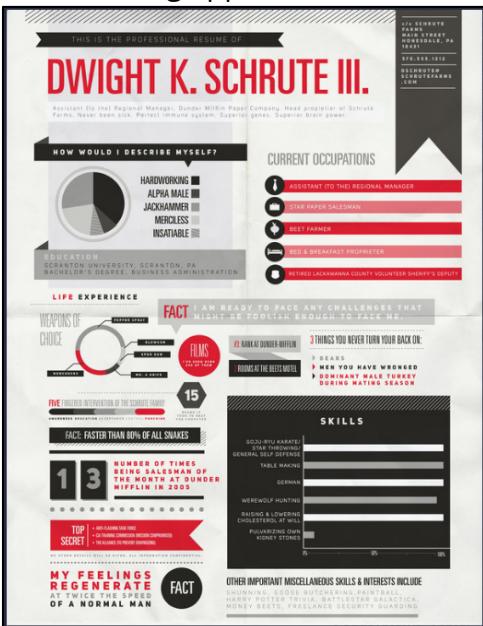


NOTE: The area you select on the map may be different from that shown in the screenshot.

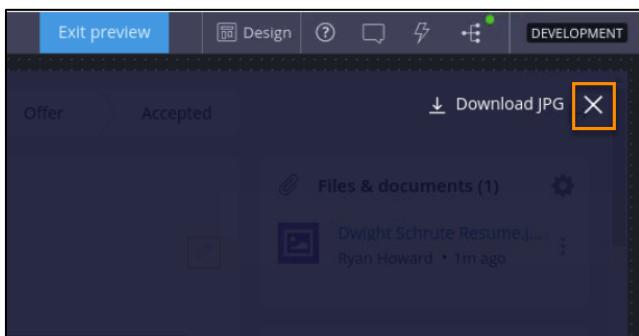
14. Under **Files & documents** (1) in the right panel, click **Dwight Schrute Resume** to open the resume attached.

The screenshot shows a software interface for managing a deal or project. At the top, there's a navigation bar with steps: view, Decision, Offer, Accepted. Below this is a map of a rural area with towns like Hankins, Callicoon Center, and Beth. To the right of the map are three panels: 'Files & documents (1)' which contains a resume file by Ryan Howard, 'Followers (0)', and 'Stakeholders (0)'. The 'Files & documents' panel has a yellow border around the resume item.

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.

Professional History					
Company	Start Date	End Date	Role	Manager	Manager Phone
Schrute Farms	19970324	20041001	Beet Farmer	Mose	555-282-7834
Karate by Ira	20041111	20150528	Brown Belt	Ira	555-272-8344
Pegasystems	20150529	20210330	Tester	Alan	555-545-1234

Cancel Save Submit

Followers (0)

No items

Stakeholders (0)

No items

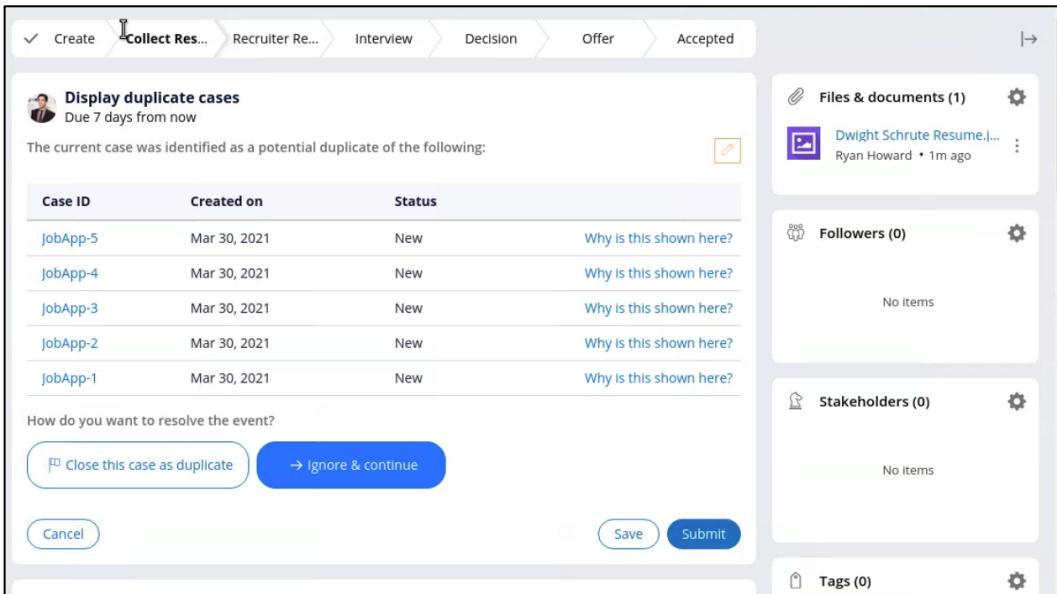
Tags (0)

No items

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

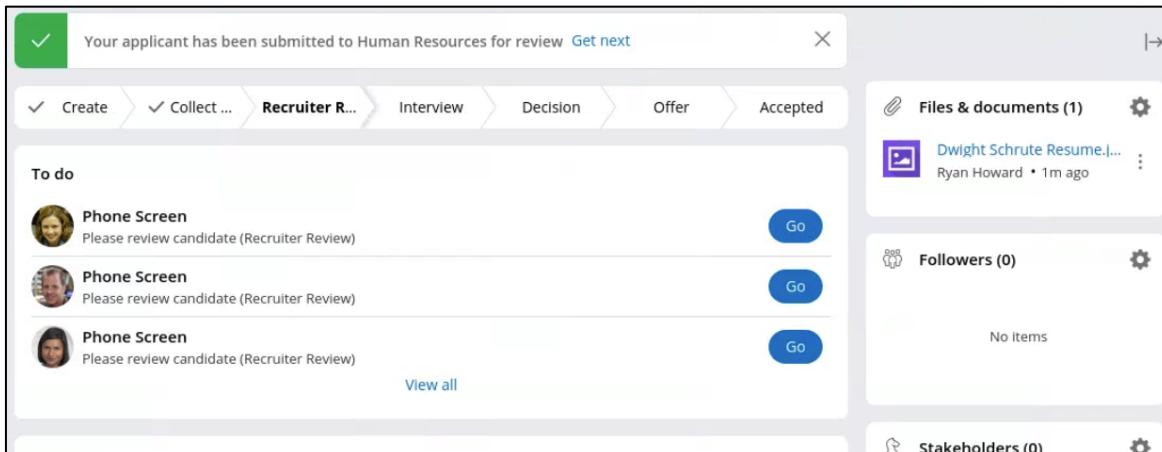
IMPORTANT: If this is the first time you are running the Job Applicant case type with Dwight Schrute as the applicant, there will be no duplicates and you will not see the Display Duplicate Cases screen. Continue to the next step.

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.

Your applicant has been submitted to Human Resources for review [Get next](#)

To do

- Phone Screen
Please review candidate (Recruiter Review) [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)

[View all](#)

Files & documents (1)
Dwight Schrute Resume.j...
Ryan Howard • 1m ago

Followers (0)
No items

Stakeholders (0)

Create → Collect ... → **Recruiter R...** → Interview → Decision → Offer → Accepted

To do

- Phone Screen
Please review candidate (Recruiter Review) [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)

[View less](#)

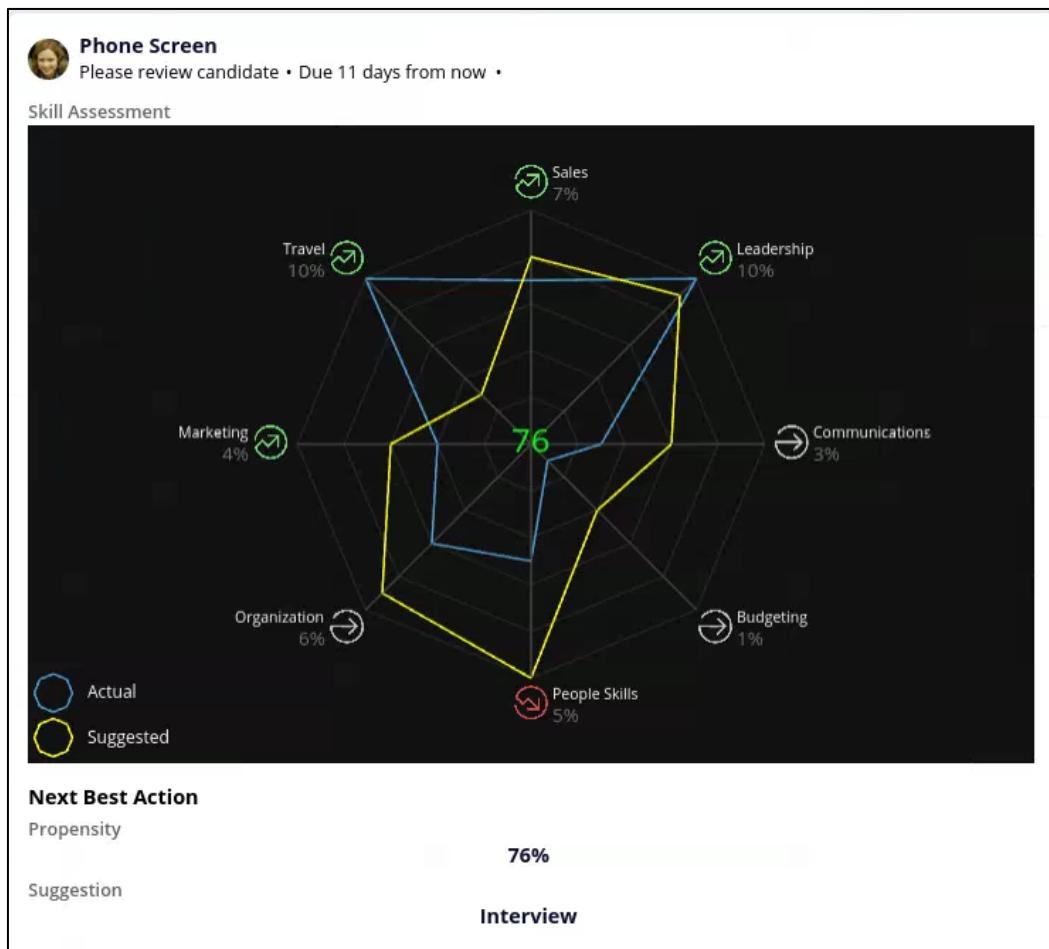
21. Click on the **Go** to the right of Pam Beasley. The following phone screen window appears:

Your applicant has been submitted to Human Resources for review [Get next](#)

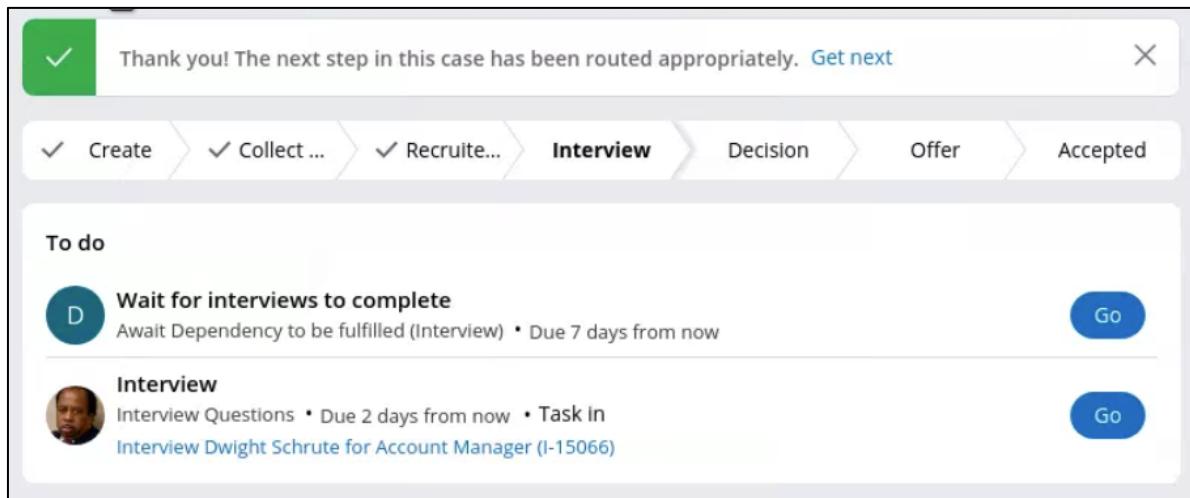
To do

- Phone Screen**
Pam Beasley [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)
- Phone Screen
Please review candidate (Recruiter Review) [Go](#)

[View all](#)



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



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

- 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:

The screenshot shows the Interview subcase details. On the left, there's a sidebar with 'Priority 10', 'Status NEW', and 'Created/Updated' by 'Ryan Howard'. The main area has tabs for 'Interview' (selected), 'Feedback', and 'Complete'. Under 'Interview', there are three questions with text input fields: 'Why do you want to work at Dunder Mifflin?' (I have heard great things about the company.), 'What is your greatest professional achievement?' (I once managed a complete rollout of data analysis project.), and 'Would you recommend this candidate?' (Yes). A rating slider is set to 8. A 'Cancel' button is at the bottom.

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

The screenshot shows the Interview subcase after submission. The status is now 'RESOLVED-COMPLETED'. The right pane shows the resolved data, including the interviewer (halpj), candidate email (Dwight.Schrute@beets.com), rating (8), and the recommendation (Yes). The 'Complete' tab is selected.

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

The screenshot shows the parent case list. An interview subcase titled 'Dwight Schrute JobApp-1' is listed with a priority of 10 and a status of 'RESOLVED-COMPLETED'. The interview link 'Dwight Schrute JobApp-1' is highlighted with a red box.

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

Dwight Schrute

PRIORITY: 10
Status: PENDING-MANAGERAPPROVAL
Created: Ryan Howard 17 minutes ago
Updated: Ryan Howard 9 minutes ago

Personal Information
First Name: Dwight
Last Name: Schrute
Address: Schrute Farms, Scranton, PA

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

Jim Halpert

Personal Information
First Name: Dwight
Last Name: Schrute
Address: Erhley Rd, Narrowsburg, NY 12764, USA

28. Click **Approve**.

Approve
Due 1 day from now

Notes

Cancel Reject Approve

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

HumanResources

Determine Comp
Due 2 days from now

Personal Information
First Name: Dwight
Last Name: Schrute
Address: Erhley Rd, Narrowsburg, NY 12764, USA

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

✓ Thank you! This case has been routed for approval. [Get next](#)

✓ Create ✓ Collect Resu... ✓ Recruiter Re... ✓ Interview ✓ Decision Offer Accepted

Determine Comp
Due 1 day from now

Salary 35000	Signing Bonus 10000
Yearly Bonus Rate 0.1	Car Supplement 3000
401 K match 0.03	Housing Supplement 5000
Total Compensation \$57,550.00	Compensation Recommendation \$60,000.00
	Recommendation Margin 0.0%

[Cancel](#) [Save](#) [Submit](#)

2 0 4 0

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**.

✓ Create ✓ Collect Resu... ✓ Recruiter Re... ✓ Interview ✓ Decision Offer Accepted

Determine Comp
Due 1 day from now

Salary 35000	Signing Bonus 10000
Yearly Bonus Rate 0.2	Car Supplement 3000
401 K match 0.03	Housing Supplement 5000
Total Compensation \$61,050.00	Compensation Recommendation \$60,000.00
	Recommendation Margin 102.0%

[Cancel](#) [Save](#) [Submit](#)

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

✓ Create > ✓ Collect ... > ✓ Recruit... > ✓ Interview > ✓ Decision > Offer > Accepted

To do

Adjust Salary
Approve Offer Go

Personal Information

First Name: Dwight
Last Name: Schrute
Phone: 555-123-4567
Email: Dwight.Schrute@beets.com
Skills: Java, Karate, Leadership, Sales

Job Posting
Title:



Map Satellite

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

Adjust Salary
Due 9 days from now •

Dear HR Manager, please adjust the compensation as the offer acceptance probability is low

Determine Comp

Salary <input type="text" value="35000"/>	Signing Bonus <input type="text" value="10000"/>
Yearly Bonus Rate <input type="text" value="0.2"/>	Car Supplement <input type="text" value="3000"/>
401 K match <input type="text" value="0.03"/>	Housing Supplement <input type="text" value="5000"/>
Total Compensation \$61,050.00	Compensation Recommendation \$60,000.00
Recommendation Margin 102.0%	
Offer acceptance probability --	

Cancel Save Submit

Adjust Salary
Due 9 days from now •

Dear HR Manager, please adjust the compensation as the offer acceptance probability is low

Determine Comp

Salary 45000	Signing Bonus 10000
Yearly Bonus Rate 0.2	Car Supplement 3000
401 K match 0.03	Housing Supplement 5000
Total Compensation \$73,350.00	Compensation Recommendation \$60,000.00
	Recommendation Margin 122.0%

Offer acceptance probability
--

[Cancel](#) [Save](#) [Submit](#)

A new view like the following appears:

✓ Create ✓ Collect ... ✓ Recruit... ✓ Interview ✓ Decision Offer Accepted

To do

Get Approval
Please approve or reject this [Go](#)

Personal Information

First Name Dwight	Address Schrute Farms, Scranton, PA
Last Name Schrute	Map Satellite
Phone 555-123-4567	
Email Dwight.Schrute@beets.com	
Skills Java Karate Leadership Sales	

Job Posting

Files & documents (2) [...](#)

- [Dwight Schrute \(I-40018\) ...](#) Ryan Howard • 1m ago
- [Dwight Schrute Resume.j...](#) Ryan Howard • 1m ago

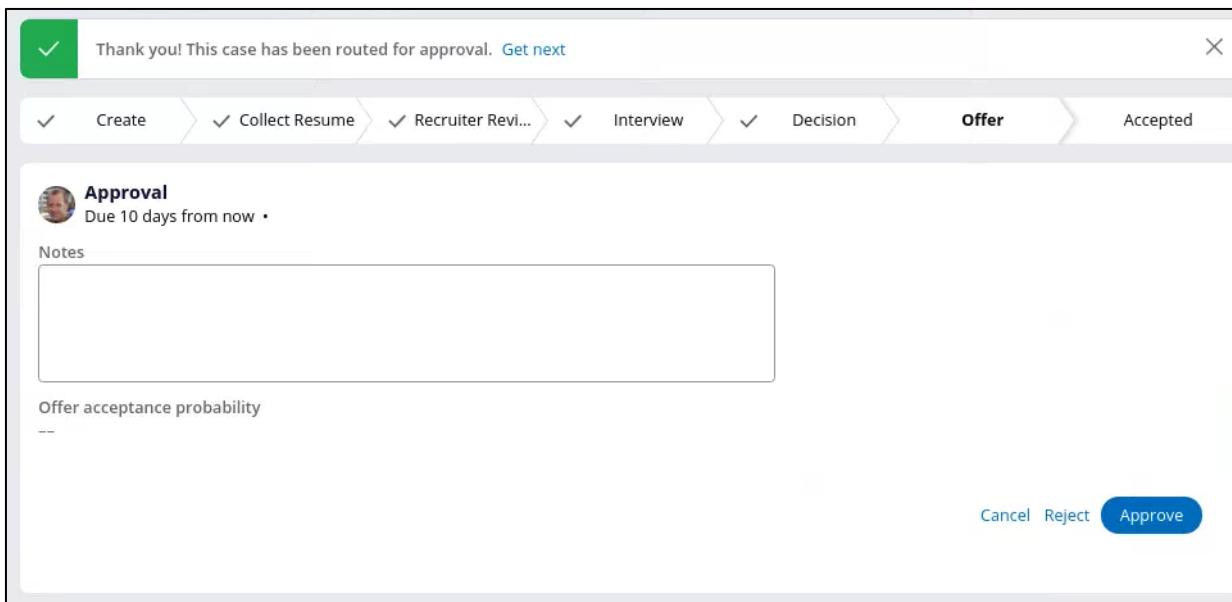
Followers (0) [...](#)

No items

Stakeholders (4) [...](#)

- [Jim Halpert](#) --
- [Jim Halpert](#) HiringManager

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.

[View email](#)

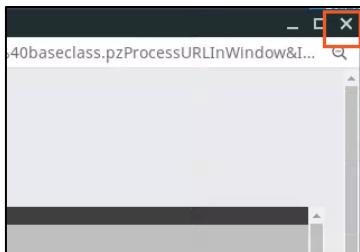
Sent: Apr 6, 2021 6:59:19 AM From ip-10-1-0-4
From: default@PegaSample.com
To: PlaceEmailHere@gmail.com
Subject: Dwight Schrute (I-40018) from Ryan Howard is waiting for approval
Attached Files: Dwight Schrute Resume (Resume)

Required Approval
Hi Jim Halpert,
Dwight Schrute (I-40018) from Ryan Howard is waiting for your approval:

Address	Schrute Farms, Scranton, PA
Applying for	
Car Supplement	\$3,000.00
Compensation	
Compensation increase	
Compensation increase rational	
Email	Dwight.Schrute@beets.com
Favorite Color	
First Name	Dwight
Housing Supplement	\$5,000.00
Is Internal Referral	
401 K match	0.03
Last Name	Schrute
Linked In	
Phone	555-123-4567
Picture	
Resume	

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.

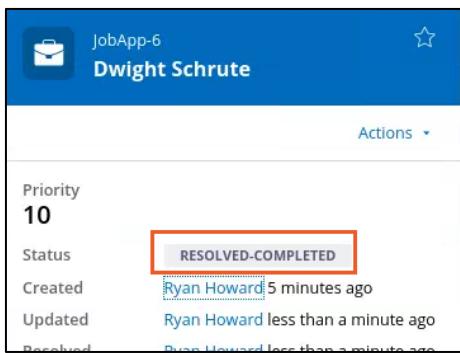
38. Close the correspondence window.



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

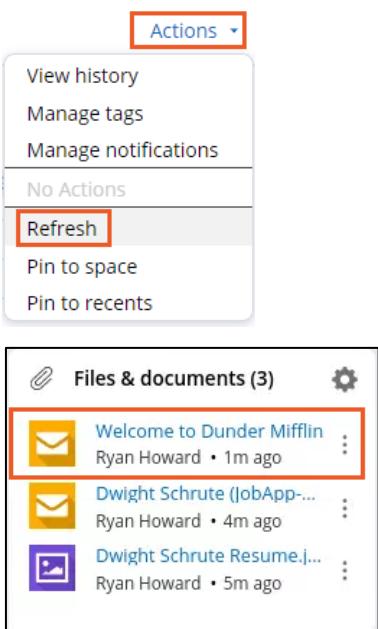


40. The case is now **Resolved-Completed**.



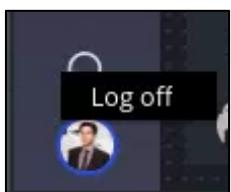
A screenshot of a job application interface for 'Dwight Schrute'. The top bar shows the app name 'JobApp-6' and the candidate's name 'Dwight Schrute'. Below the bar, there are sections for 'Priority' (set to 10), 'Status' (labeled 'RESOLVED-COMPLETED' with a red box around it), 'Created' (by 'Ryan Howard' 5 minutes ago), 'Updated' (by 'Ryan Howard' less than a minute ago), and 'Resolved' (by 'Ryan Howard' less than a minute ago). An 'Actions' dropdown menu is visible at the top right.

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



The image shows two screenshots illustrating the refresh process. The top part is a 'Actions' dropdown menu with options like 'View history', 'Manage tags', 'Manage notifications', 'No Actions', 'Refresh' (which is highlighted with a red box), 'Pin to space', and 'Pin to recents'. The bottom part is a 'Files & documents (3)' list showing three items: a welcome email from 'Ryan Howard' sent 1m ago, a job application from 'Dwight Schrute (JobApp-6)' sent 4m ago, and a resume file 'Dwight Schrute Resume.j...' sent 5m ago. The first email item is also highlighted with a red box.

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.

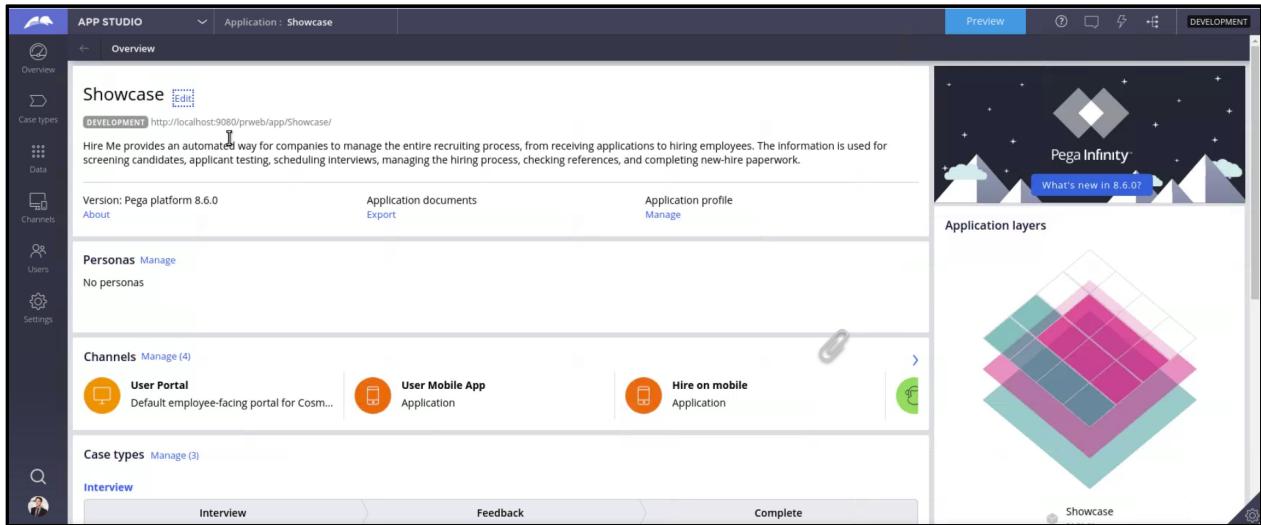
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

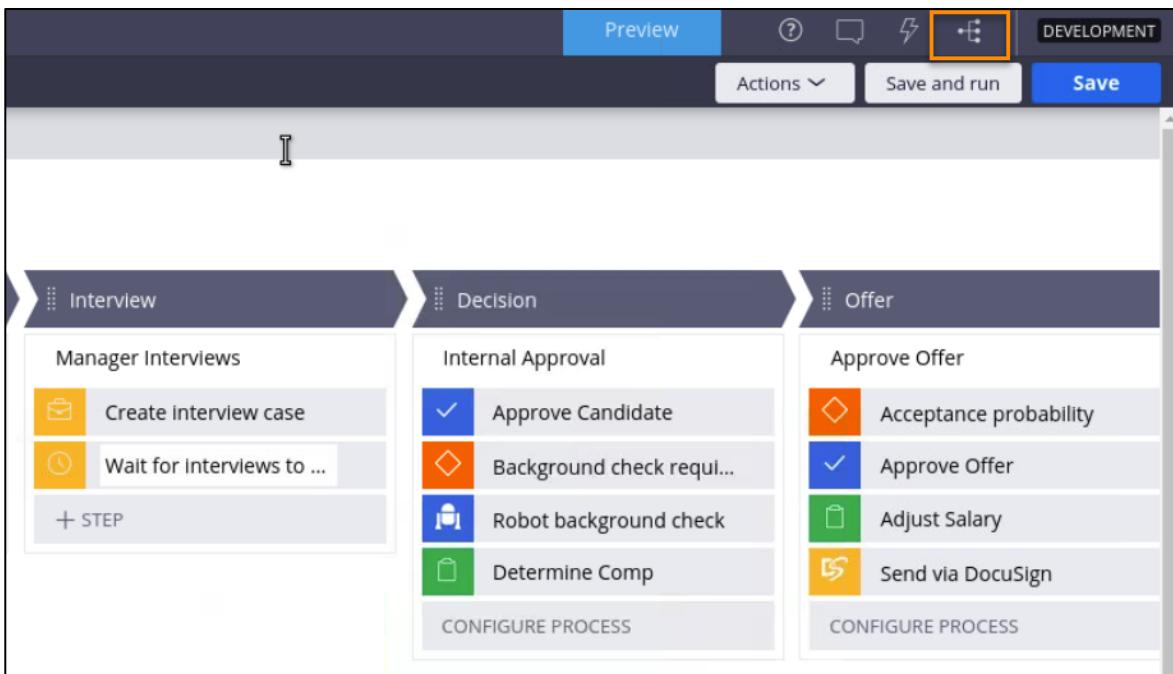
Task 1: Enable branching

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

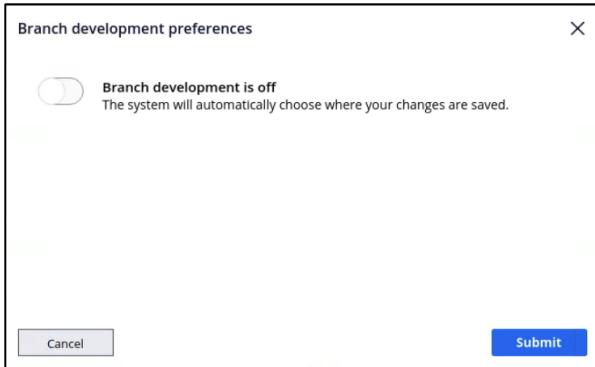
1. Log in and use the credentials **howar** and **rules**. The following appears:



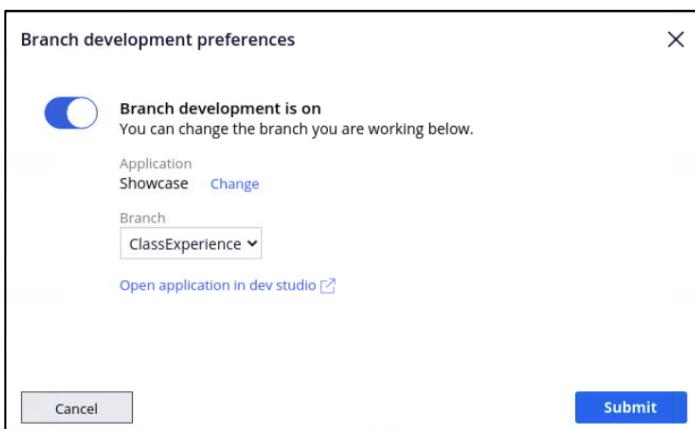
From the title bar click the Toggle branch development button.



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.

APP STUDIO Application: Showcase

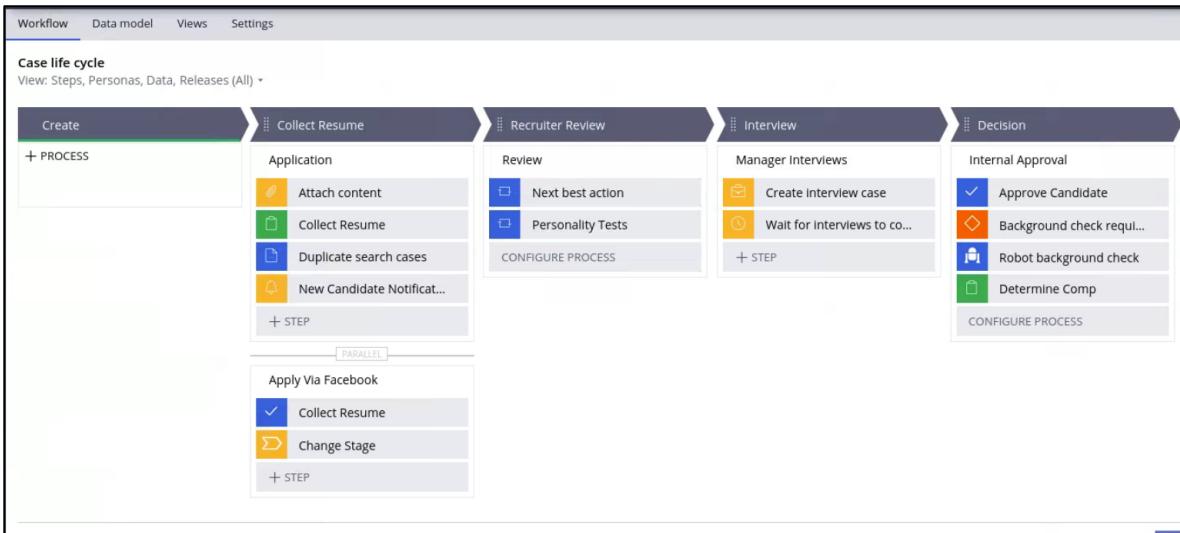
Case types

Case types

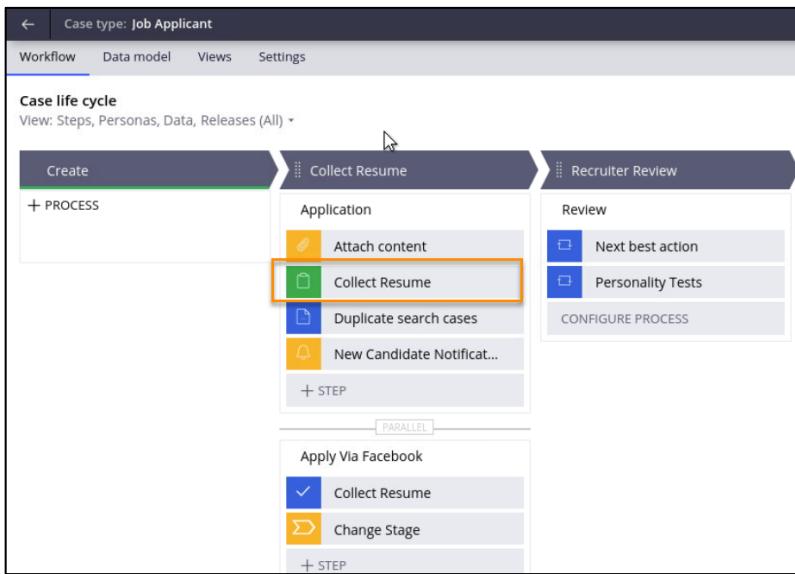
Type
Interview
Job Applicant
Space

Case types Data Channels

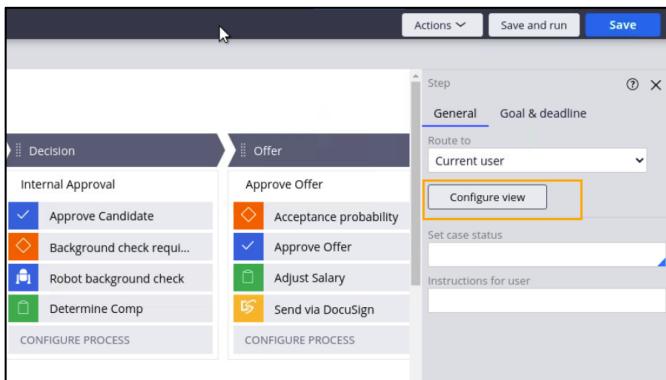
The following appears:



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



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

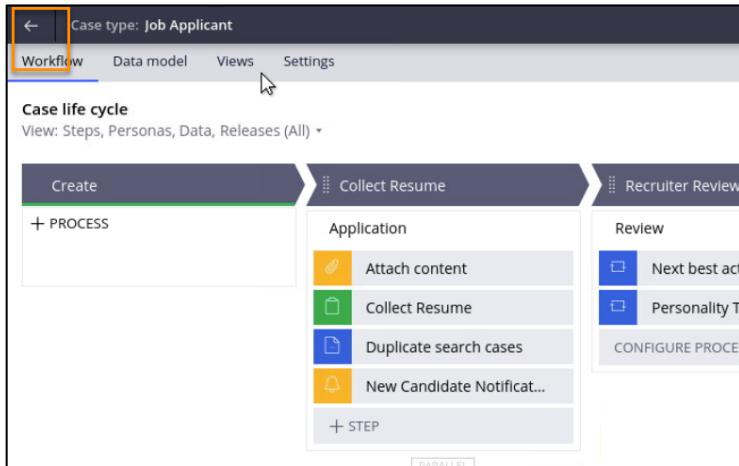


- Two additional views are embedded in this view.

Field	Type	Options
Personal Information	View	Auto
Professional History	View	Auto

+ Add field

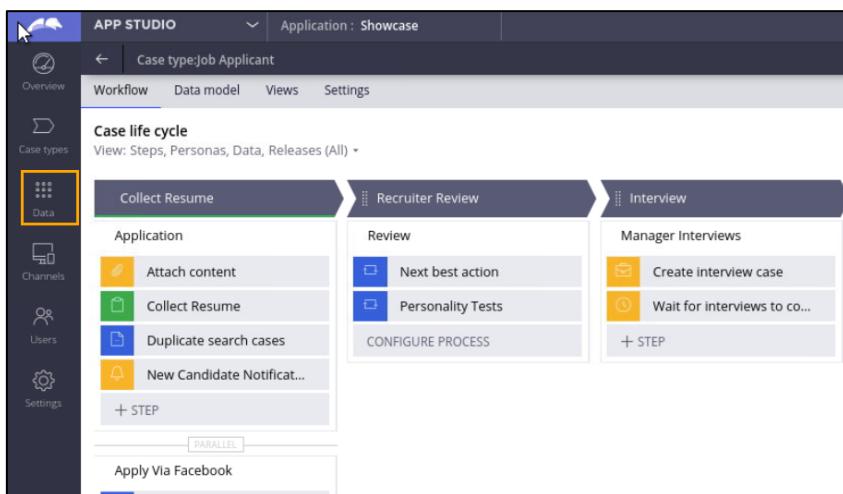
- Click **Cancel** to close the window.
- Take a few minutes to view the design for the other steps in the case type.
- Close the form by going back to the previous page.



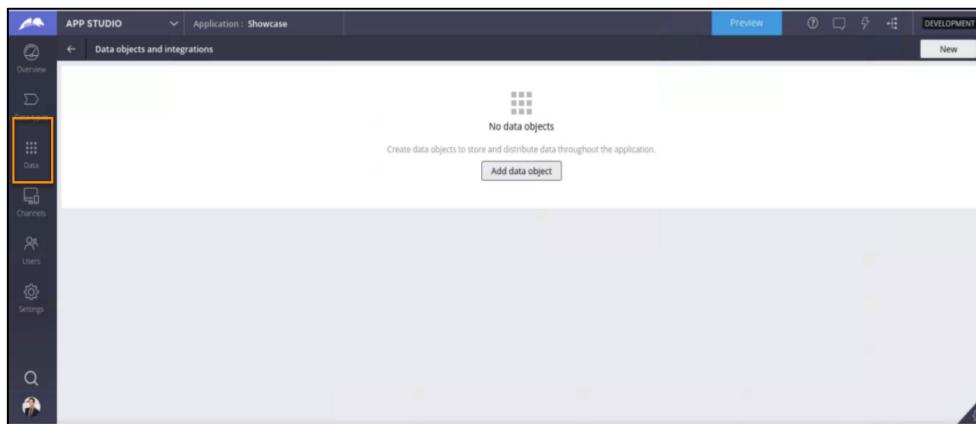
Task 3: Review the design of the Job Applicant data model

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

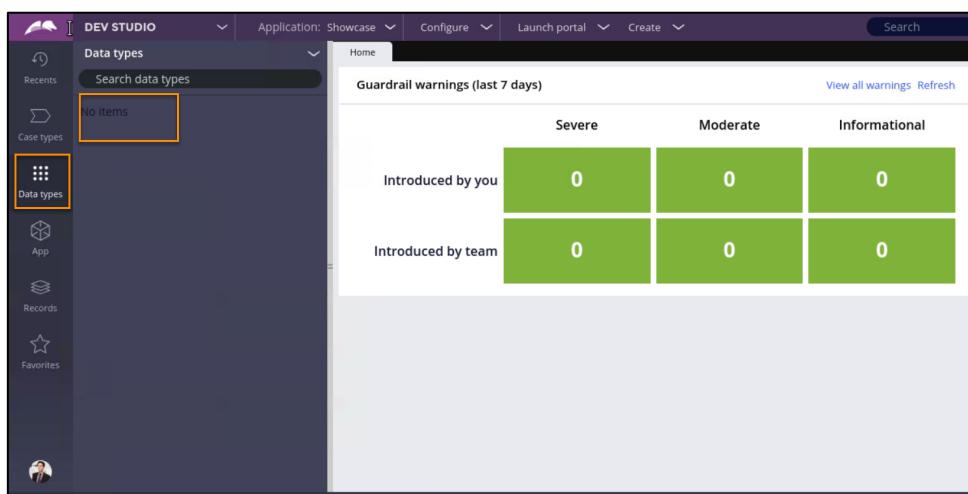
- On the left, click the **Data** button.



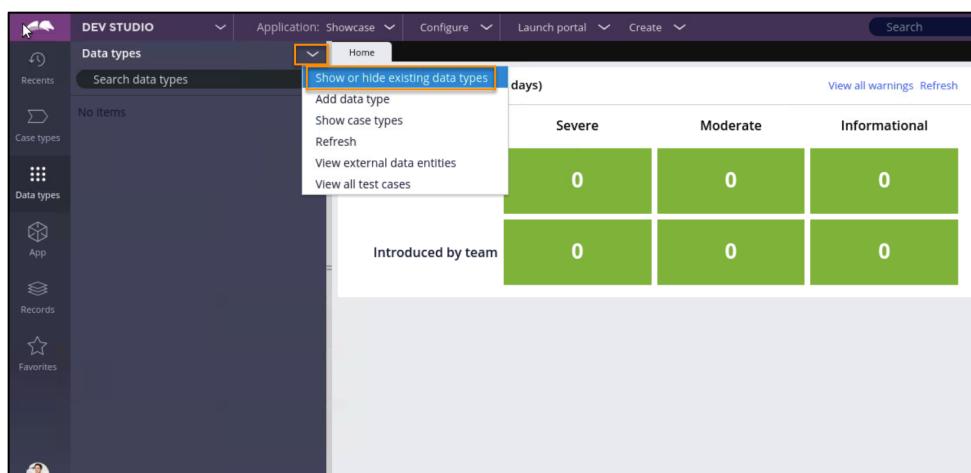
IMPORTANT: If the data types are not included in the Showcase application below screen will be displayed. If this happens follow steps 2 to 6. Otherwise jump to step 7.



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



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

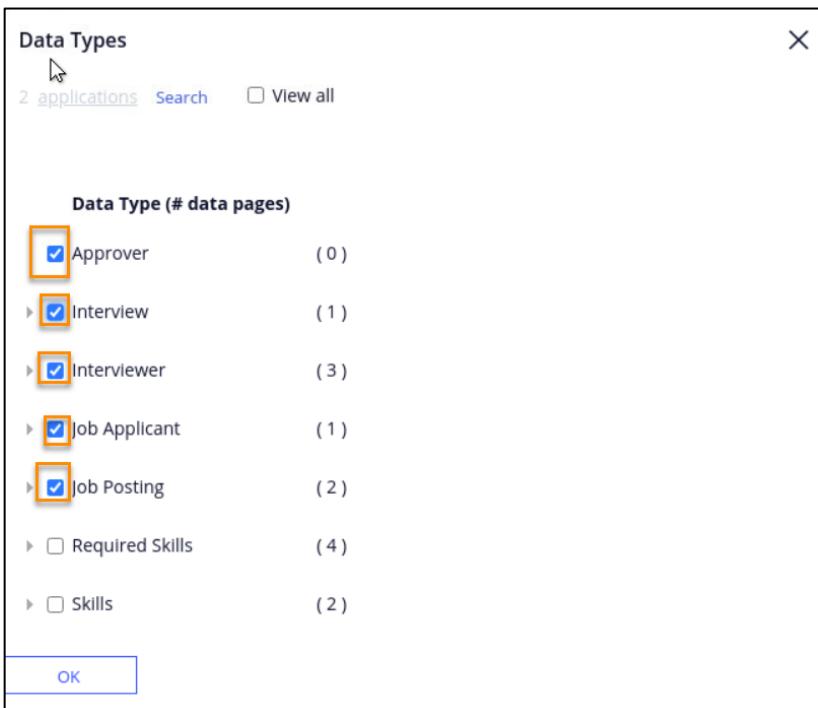


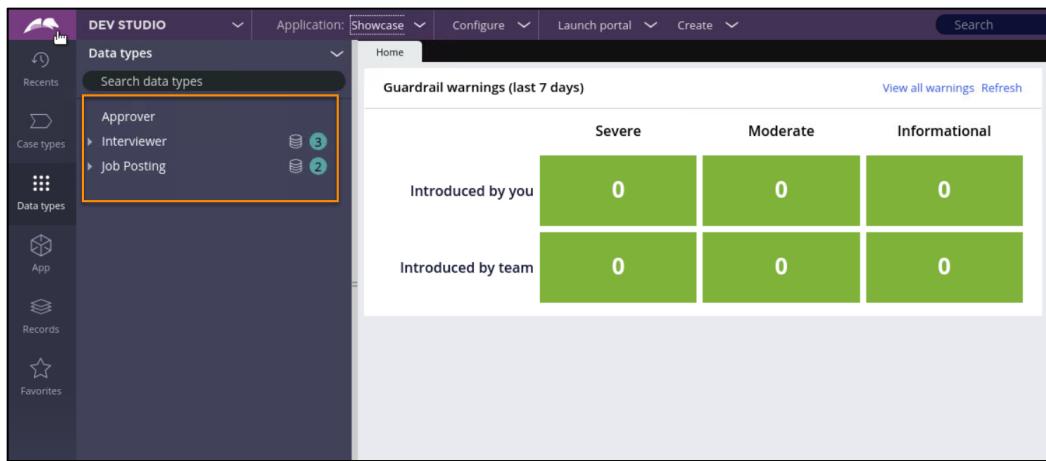


4. Select **Hire Me** application and click on **Apply**.



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



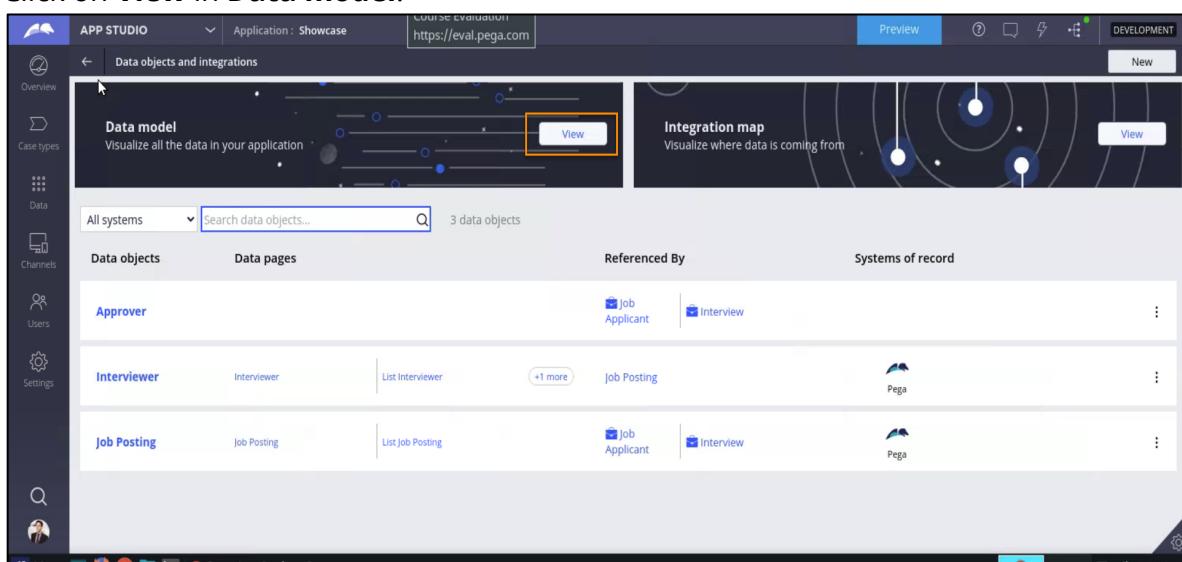


6. Switch to App Studio and click on Data.

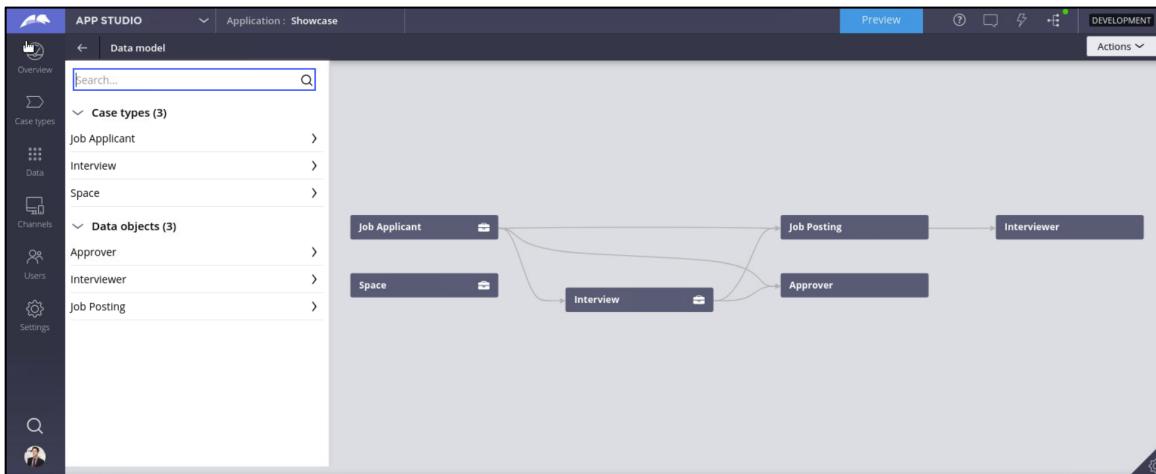
The **Data** panel appears:

A screenshot of the Pega APP STUDIO interface. The top navigation bar shows 'Application: Showcase' and a preview URL 'https://eval.pega.com'. On the left, a sidebar has 'Data' selected. The main area is titled 'Data objects and integrations'. It features two cards: 'Data model' (Visualize all the data in your application) and 'Integration map' (Visualize where data is coming from). Below these are sections for 'Data objects' (Approver, Interviewer, Job Posting), 'Data pages' (List Interviewer, List Job Posting), 'Referenced By' (Job Applicant, Interview), and 'Systems of record' (Pega). A search bar at the top says 'Search data objects...'. The entire screenshot is framed by a thick black border.

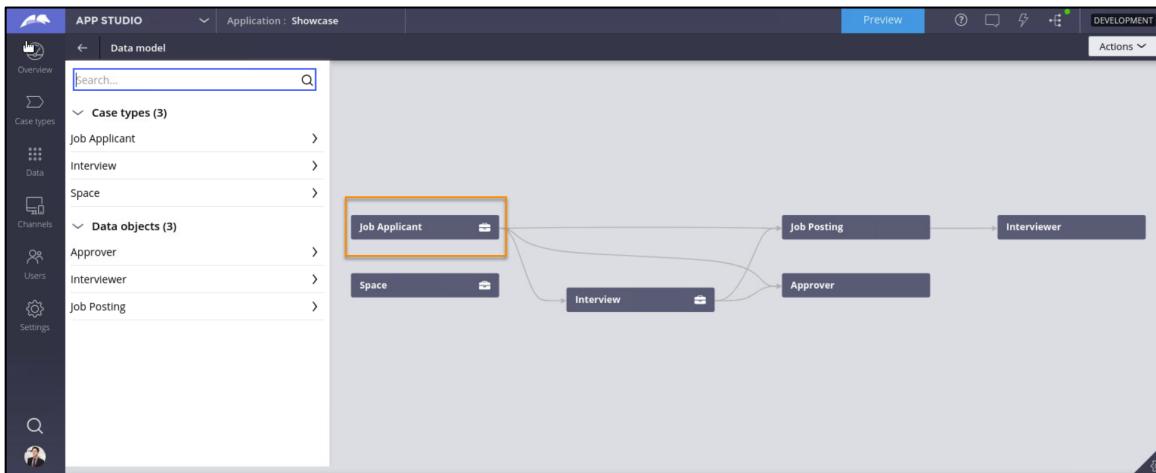
7. Click on View in Data model.



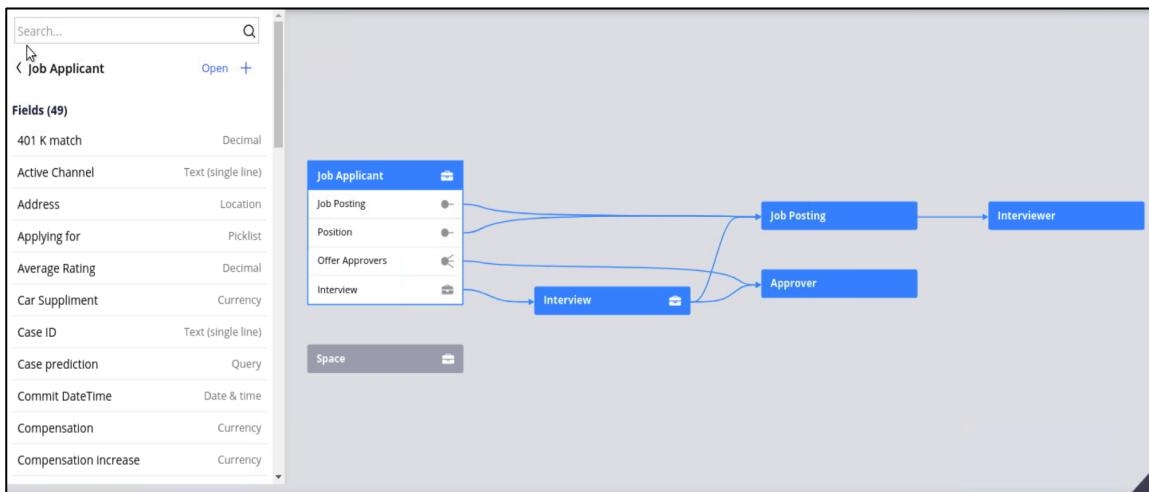
8. The Case types and data model are displayed.



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**.

The screenshot shows the Pegasystems App Studio interface with the 'Data model' tab selected. On the left, there's a sidebar with icons for Overview, Case types, Data, Channels, Users, and Settings. The main area displays a list of fields under the 'Job Applicant' entity. The 'Resume' field is highlighted with a blue selection bar and has a gear icon (representing configuration) highlighted with a red box. To the right of the list is a diagram showing relationships between entities: 'Job Posting', 'Position', 'Offer Approvers', 'Interview', 'Job Posting', 'Approver', and 'Space'. Arrows indicate data flow from 'Job Posting' to 'Position', 'Offer Approvers', and 'Approver'; from 'Position' to 'Offer Approvers'; from 'Offer Approvers' to 'Approver'; and from 'Interview' to 'Approver'.

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

The screenshot shows the 'Configure field' dialog box. At the top, it says 'Field name *' with 'Resume' entered. Below that, 'Type' is set to 'Attachment'. Under 'Attachment Category', 'Resume' is selected. There's an 'Advanced' section with a plus sign. At the bottom are 'Cancel' and 'Submit' buttons.

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

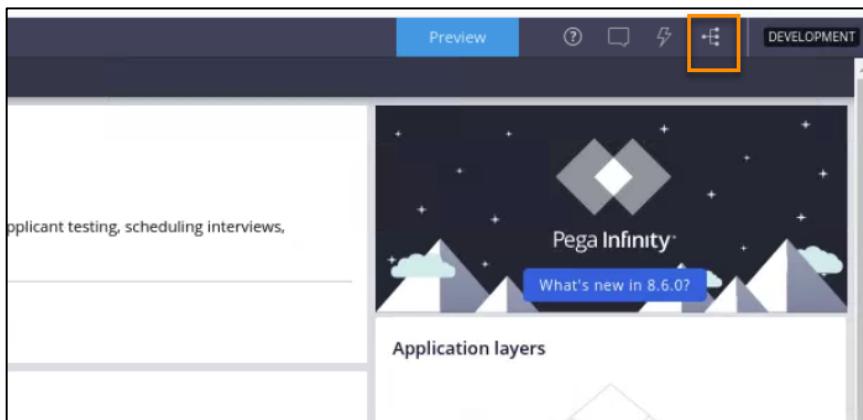
Task 1: Login and enable branching

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

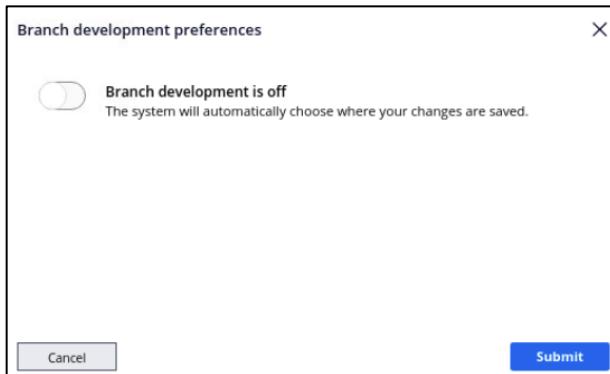
The screenshot shows the Pega APP STUDIO interface with the 'Showcase' application selected. The left sidebar includes 'Overview', 'Data', 'Case Types', 'Users', and 'Settings'. The main content area displays the 'Showcase' application's overview, including its version (Pega platform 8.6.0), application documents, and application profile. It lists 'Personas' (Showcase Author, Showcase Administrators), 'Channels' (User Portal, User Mobile App, Hire on mobile, Pega API), and 'Case types' (Interview, Job Applicant, Space). On the right, there is a 'Preview' window showing the 'Pega Infinity' landing page with sections for 'What's new in 8.6.0?' and 'Application layers'.

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

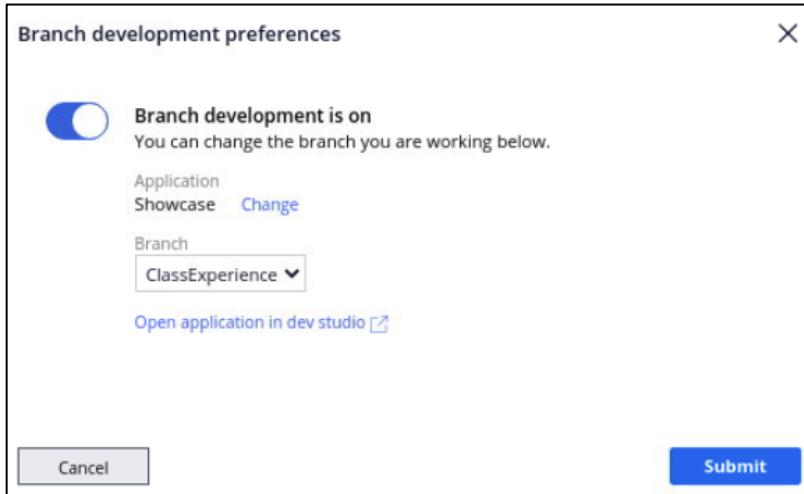
Note: If branching is already turned on skip this step 2 and also step 3.



The following appears:



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



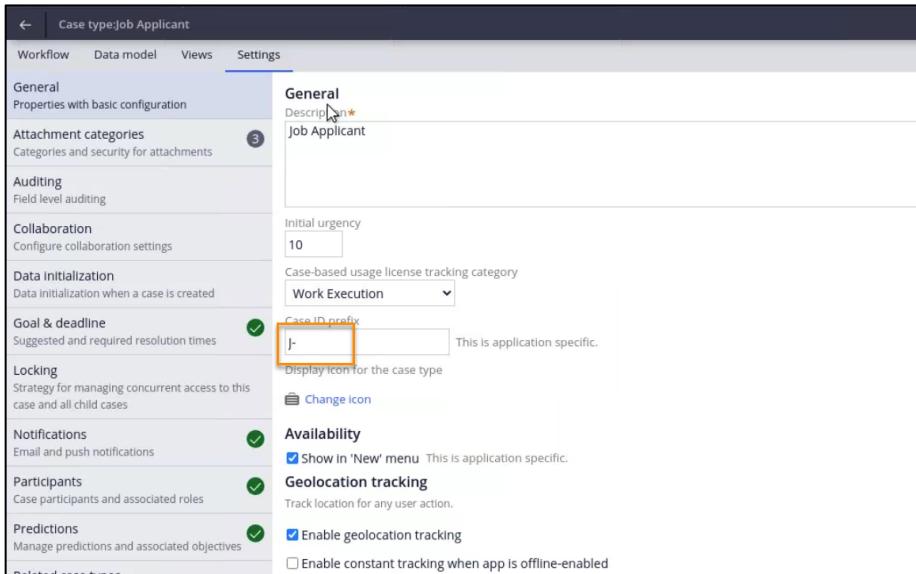
Task 2: Modify the design of Job Applicant case type

Change the CaseID

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

The following appears:

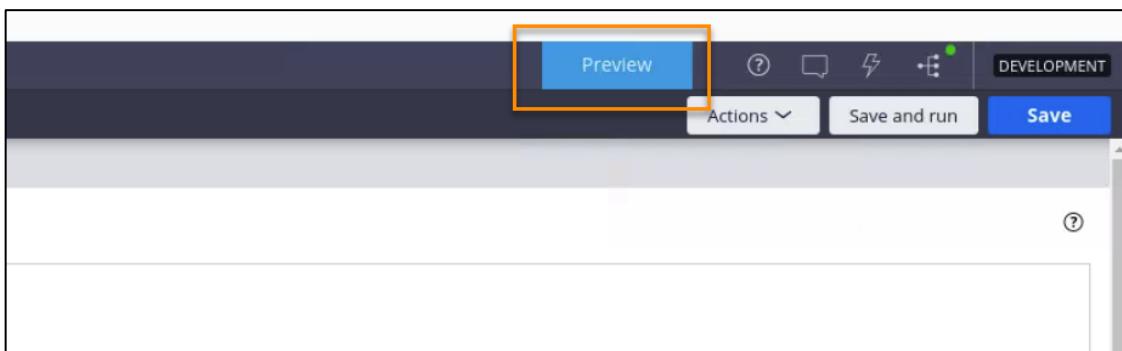
2. Click the **Settings** tab and change the **CaseID prefix** from **JopApp-** to **J-**.



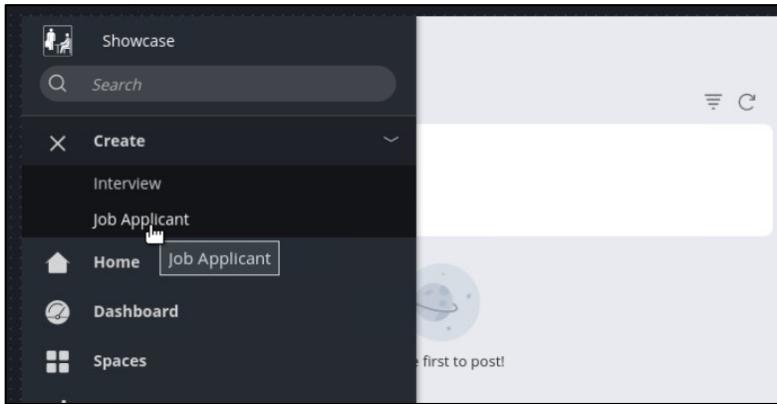
3. Click **Save**.

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-

The screenshot shows the Pega Case Management interface. On the left, there's a sidebar with icons for Overview, Data, Channels, Users, and Settings. The main area displays a case for 'Dwight Schrute' with CaseID 'J-1' highlighted in a red box. The case details include Priority (10), Status (NEW), and creation and update times by 'Ryan Howard'. A 'Details' section is present. On the right, a 'Collect Resume' step is shown in the workflow, with a sub-form for 'Personal Information' containing fields for First Name (Dwight), Last Name (Schrute), Phone (555-123-4567), Email (Dwight.Schrute@beets.com), and Skills (Java, Karate, Leadership, Sales).

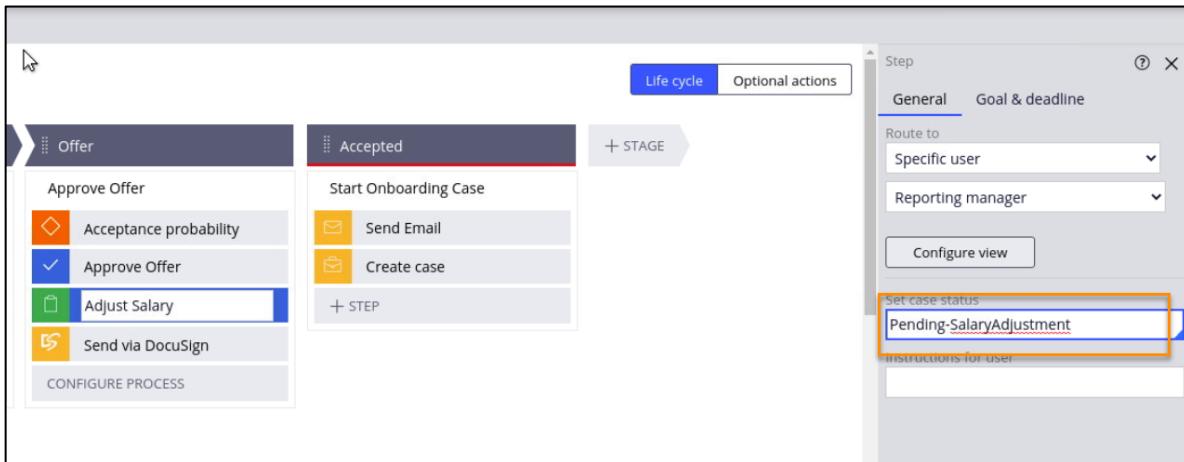
4. From App Studio, click **Case types** then click **Job Applicant** to open the case type.

The screenshot shows the App Studio interface with the 'Case types' page selected from the sidebar. A search bar shows 'Search case types...' with '3 case types' results. The results list includes 'Interview' (selected), 'Job Applicant' (highlighted with a red box), and 'Space'.

The following appears:

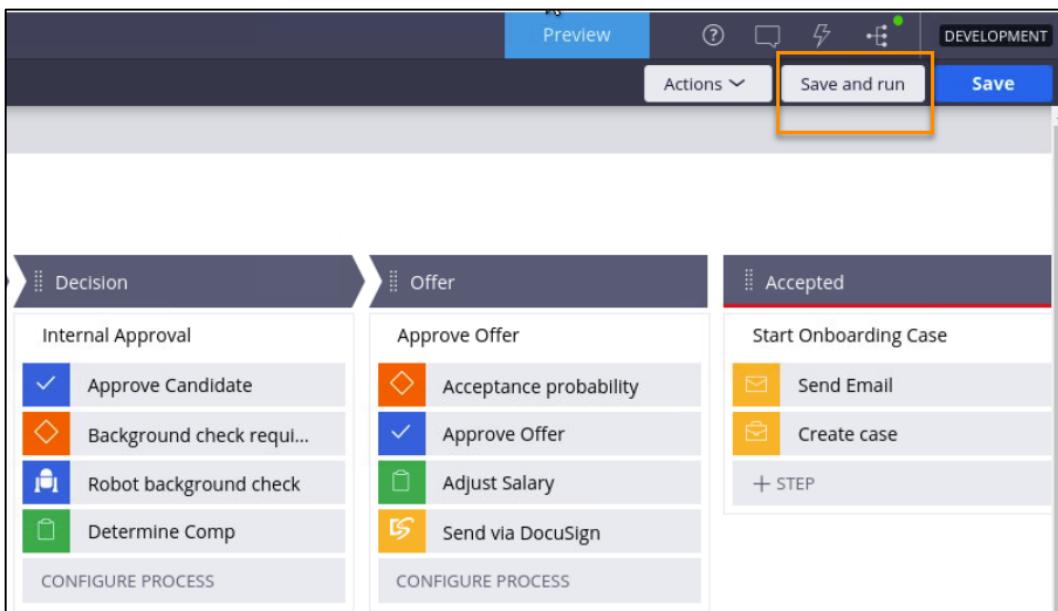
The screenshot shows the 'Case type: Job Applicant' configuration screen. At the top, there are tabs for Workflow, Data model, Views, and Settings, with 'Workflow' selected. The 'Case life cycle' section shows a sequence of steps: Create, Collect Resume, Recruiter Review, Interview, Decision, and Offer. Each step has associated configuration options. For example, the 'Create' step has actions like 'Attach content', 'Collect Resume', and 'Duplicate search cases'. The 'Offer' step has actions like 'Acceptance probability', 'Approve Offer', and 'Adjust Salary'. A note at the bottom states 'View: Steps, Personas, Data, Releases (All) •'.

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**.

The screenshot shows a case record for 'Dwight Schrute' with a priority of 10 and a status of 'NEW'. The 'Actions' dropdown menu is open, and the 'Change stage' option is highlighted with a red box. To the right, the 'Collect Resume' step is shown with a due date of '2 days from now'. The personal information section includes fields for First Name (Dwight), Last Name (Schrute), Phone (555-123-4567), Email (Dwight.Schrute@beets.com), and Skills (Java, Karate, Leadership, Sales). A 'Job Posting' section is also present.

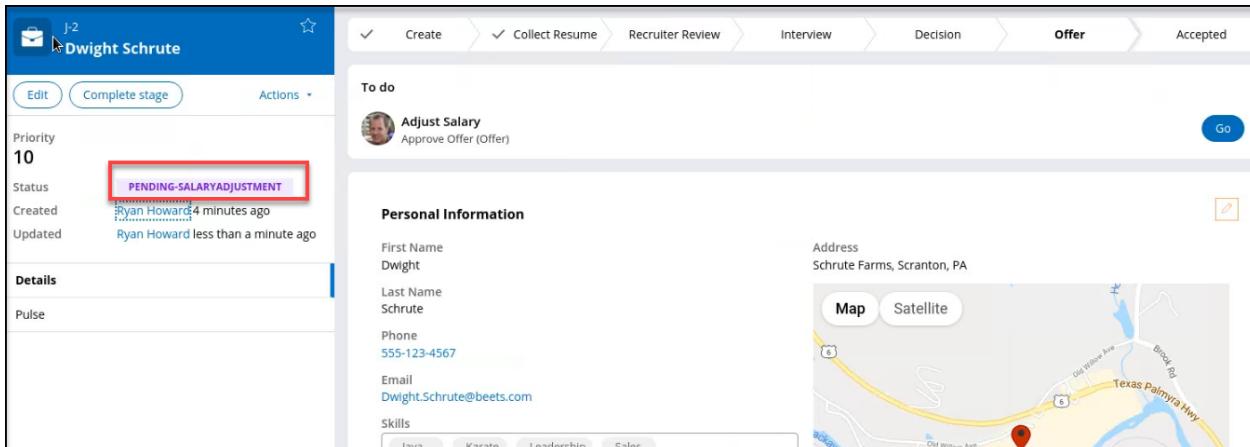
8. Change **Next stage** to **Choose a stage**.

The 'Change stage' dialog box is displayed. The 'Select stage:' dropdown is set to 'Choose a stage'. There is an audit note field and a 'Submit' button.

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

The 'Change stage' dialog box is displayed again. The 'Select stage:' dropdown is now set to 'Offer'. There is an audit note field and a 'Submit' button.

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

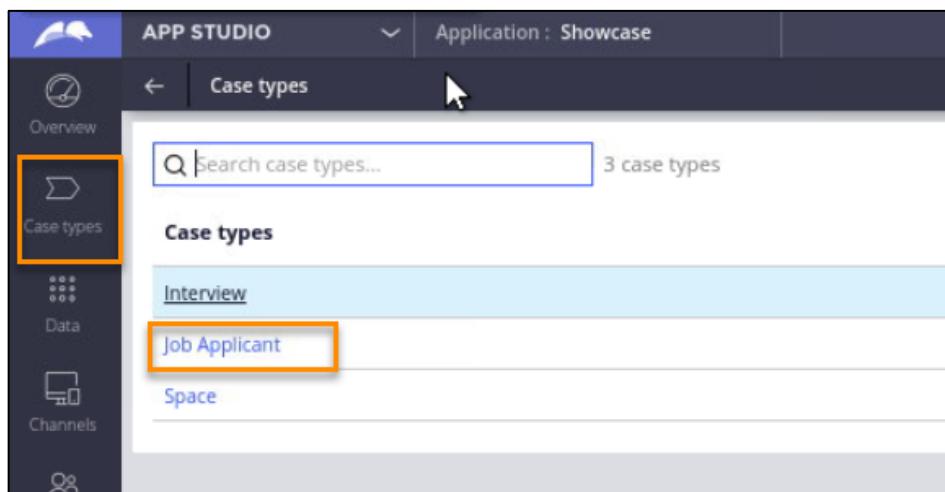


The screenshot shows the 'Dwight Schrute' case detail page. The status 'PENDING-SALARYADJUSTMENT' is highlighted with a red box. The 'Offer' stage is active, showing the 'Adjust Salary' task. Personal information for Dwight Schrute is listed, along with a map of Schrute Farms, Scranton, PA.

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.

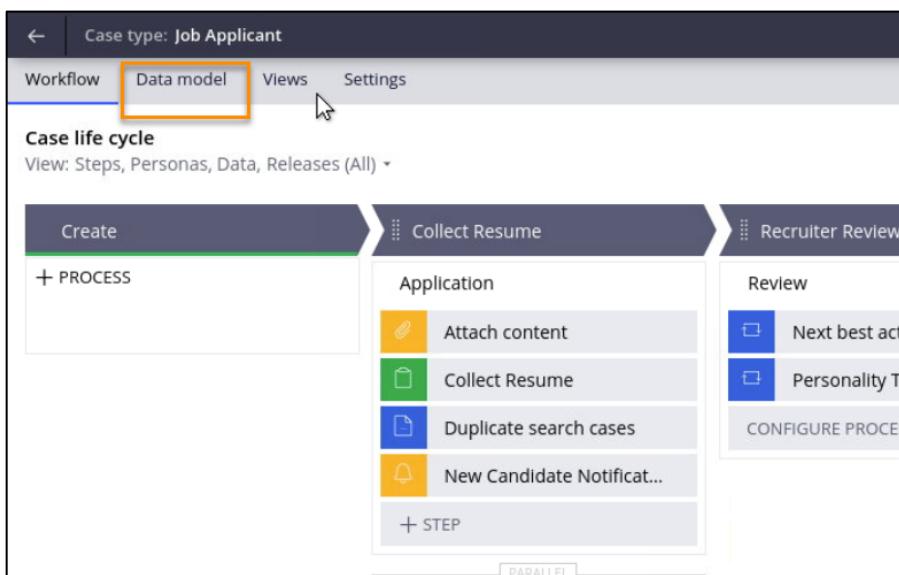
Capture the desired start date for employment

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



The screenshot shows the 'APP STUDIO' interface with 'Case types' selected. A search bar shows 'Search case types...' and indicates '3 case types'. The 'Job Applicant' case type is highlighted with an orange box.

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



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

The screenshot shows the 'Add field' screen. At the top are buttons for Actions, Save and run, and Save. Below is a search bar with 'View data model' and 'Add field' (which is highlighted with an orange box). The main area is a table with columns: Type, Options, and Application Layer. The table lists various field types: Decimal, Location, Picklist, Decimal, Currency, Text (single line), Query, and Currency, all associated with the 'Hire Me' application layer.

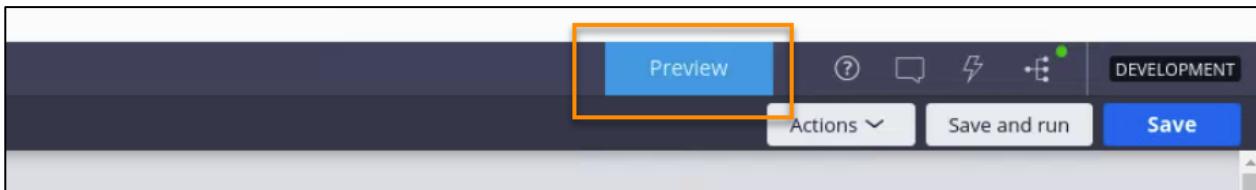
Type	Options	Application Layer
Decimal		Hire Me
Location		Hire Me
Picklist	Search box	Hire Me
Decimal	Calculated; Read-only	Hire Me
Currency		Hire Me
Text (single line)	Key; Read-only	Pega Platform
Query	Prediction Results	Hire Me
Currency		Hire Me

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

The screenshot shows the 'Add field to Job Applicant' dialog. It has fields for 'Field name *' (containing 'Start Date') and 'Type' (set to 'Date & time', which is highlighted with a blue selection bar). Below the type is an 'Advanced' link. At the bottom are 'Cancel', 'Submit & add another', and a large blue 'Submit' button.

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**.

This screenshot shows the 'Offer' stage of a process flow. The top navigation bar shows steps: Create, Collect Resu..., Recruiter Review, Interview, Decision, Offer, Accepted. Below the bar, under 'To do', there is a task card for 'Adjust Salary' (Approved Offer). To the right of the task is a blue 'Go' button, which is highlighted with an orange rectangle. The main area shows 'Personal Information' for Dwight Schrute, including address details and a map view.

This screenshot shows the 'Adjust Salary' dialog box. At the top, it displays a message: 'Dear HR Manager, please adjust the compensation as the offer acceptance probability is low'. Below this is a section titled 'Determine Comp' with various input fields: Salary (\$35000), Signing Bonus (\$10000), Yearly Bonus Rate (0.1), Car Supplement (\$3000), 401 K match (0.03), Housing Supplement (\$5000), Total Compensation (\$57,550.00), Compensation Recommendation (\$60,000.00), and Recommendation Margin (0.0%). At the bottom are 'Cancel' and 'Save' buttons, with 'Save' being highlighted with an orange rectangle.

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

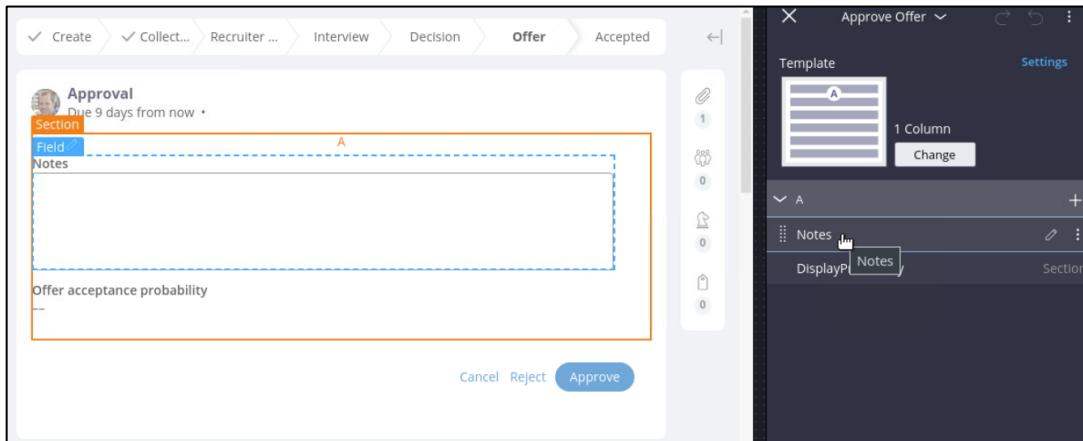


18. Click the pencil icon to configure this view. A grey panel will open to the right. Click the blank section under **ApprovalDefaultForm**.

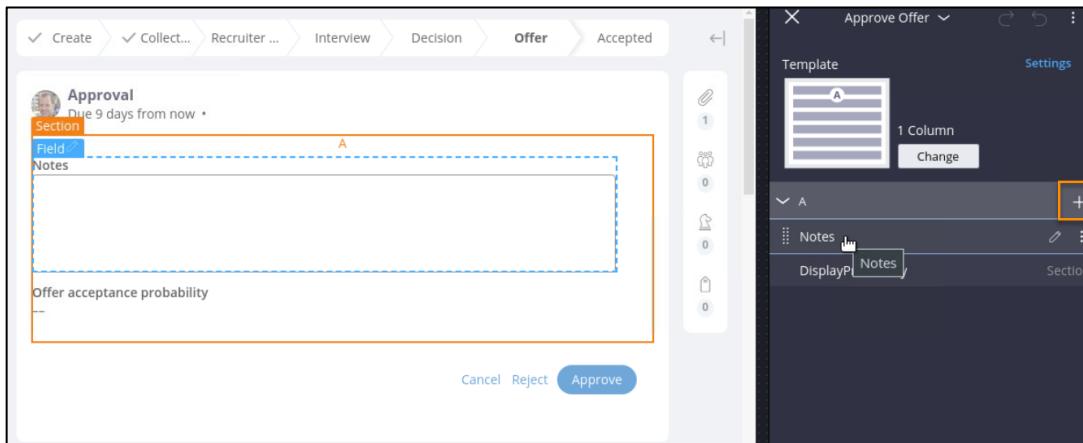
This screenshot shows the configuration interface for the Approval screen. On the left is the Approval screen with its standard layout. On the right is a larger configuration panel titled "Approve or Reject thi...". It has a "Template" section at the top with a "Change" button. Below it is a tree view under section "A". The first node is "ApprovalDefaultForm", which has a "Section" node underneath it. This "Section" node is highlighted with a red box. In the configuration panel, there is also a "Section" node under "ApprovalDefaultForm" with a "Edit this 'Section'" button, which is also highlighted with a red box.

This screenshot shows the configuration panel after changes have been made. The "Edit this 'Section'" button in the configuration panel is now highlighted with a red box. The "Section" node under "ApprovalDefaultForm" in the configuration panel is also highlighted with a red box, indicating it has been selected or modified.

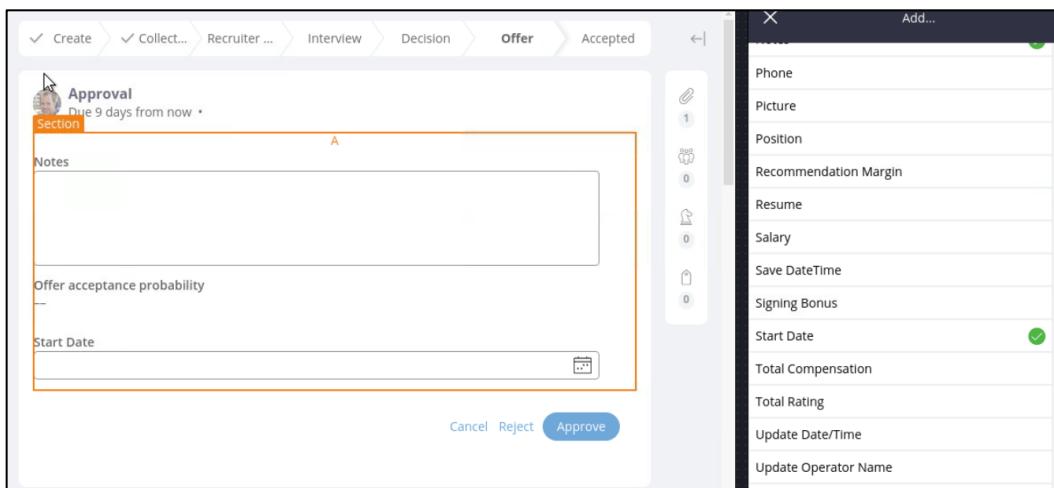
19. Once activated, click on the **Notes** text area location. The grey area will change to reflect that portion of the screen available to edit in real-time.



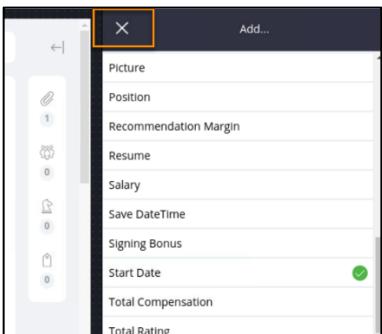
20. Click the plus icon to add the field you just created.



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.

A screenshot showing two panels side-by-side. On the left is the user view of a case. It shows a breadcrumb navigation: Create > Collect Resu... > Recruiter Review > Interview > Decision > Offer > Accepted. Below this is an 'Approval' section with a due date of 'Due 9 days from now'. The 'Notes' and 'Offer acceptance probability' sections are shown above a 'Start Date' input field. On the right is the 'Approve Offer' template editor. It shows a 'Template' section with a '1 Column' layout. Under section 'A', there is a 'Notes' field (Text area), a 'DisplayProbability' field (Section), and a 'Start Date' field (Date time). The 'Start Date' field in both the user view and the template editor is highlighted with an orange border.

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

A screenshot of the user view after modification. The breadcrumb navigation and approval section remain the same. However, the 'Start Date' input field is now prominently displayed at the bottom of the page, enclosed in a large orange border. The rest of the page layout, including the notes and offer acceptance probability sections, has shifted upwards to accommodate this change.

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**.

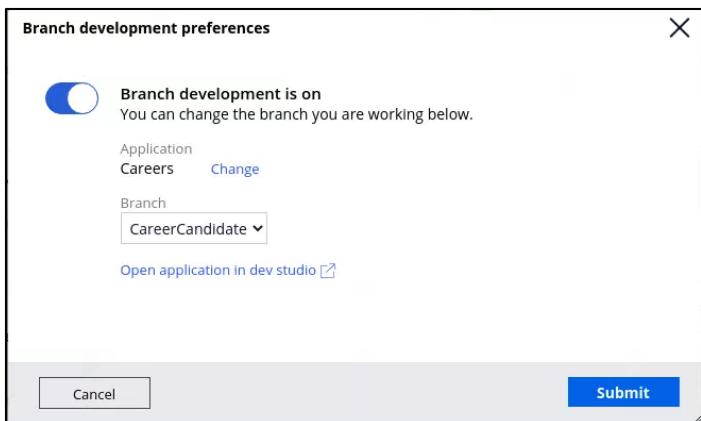


The **App Studio** appears:

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.

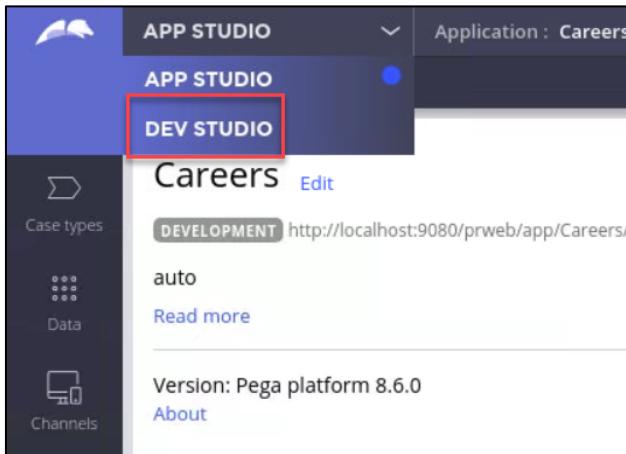
Case types	Type	Referenced data objects
Evaluate_and_Sell_a_Vehicle	Standard	Bank Details, OwnerDetails, Vehicle Details
Interview	Standard	
RV Calculation	Standard	

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.

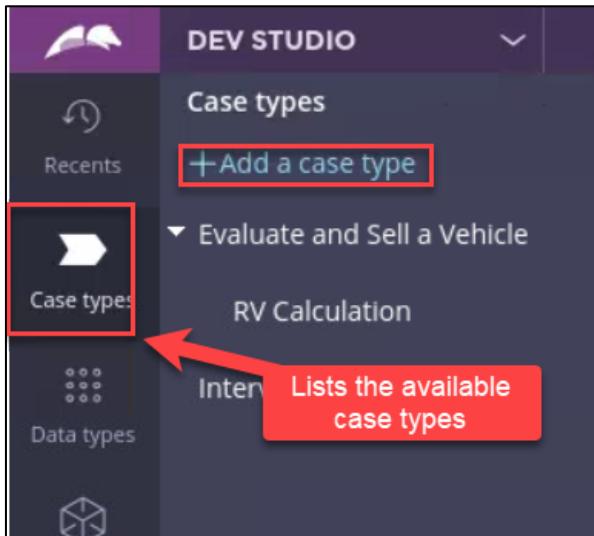
Task 3: Manage case types and add a new case type.

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**.

Add case type

Name *

Advanced Settings

Cancel Submit

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

Edit case type: Career Candidate1

Workflow Data model Views Settings Test cases Actions Save and run Save X

Case life cycle

Create + STAGE

Create
Create
+ FORM STEP

+ ALTERNATE STAGE

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.

Case types + Add a case type

Career Candidate1

Evaluate and Sell a Vehicle

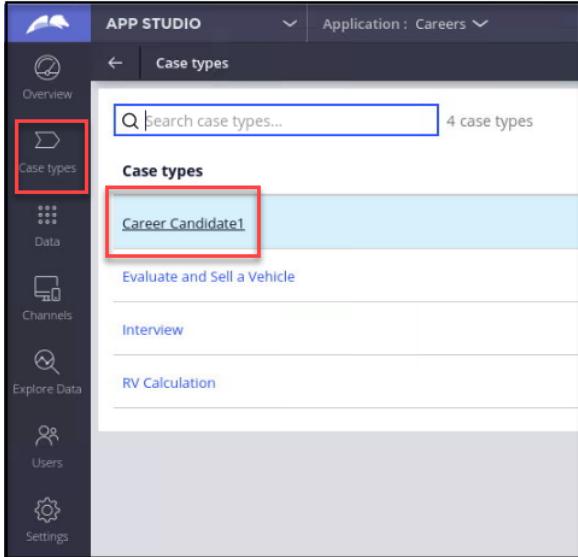
RV Calculation

Interview

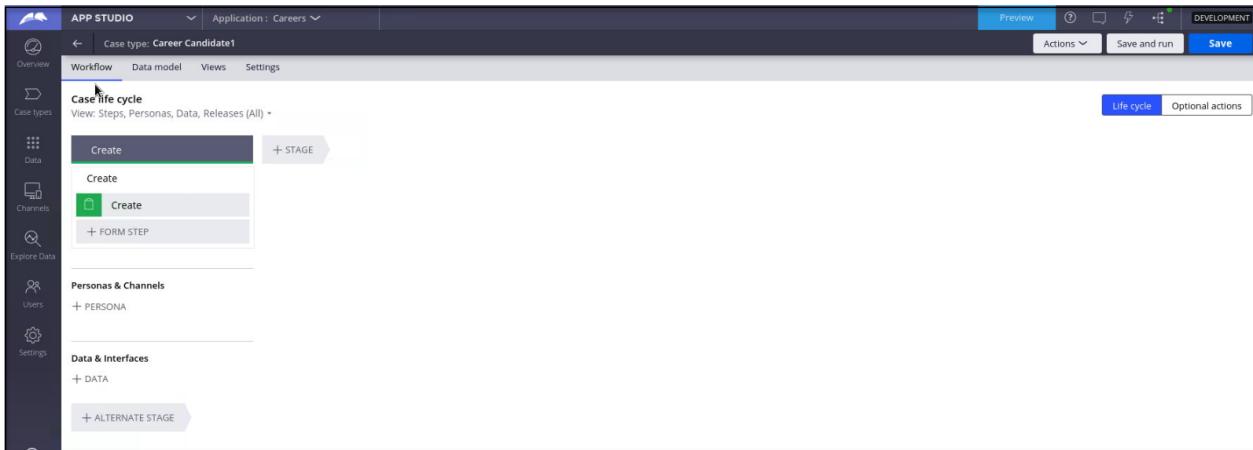
Home Career Candid... Edit case type: Career Candidate1 Workflow Data model Views Settings Test cases Case life cycle Create + STAGE Create Create + FORM STEP + ALTERNATE STAGE

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.

- 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.

- 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**.

Branch development preferences

Branch development is on
You can change the branch you are working below.

Application
Careers [Change](#)

Branch

[Open application in dev studio](#)

[Cancel](#) [Submit](#)

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

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

The screenshot shows the 'Case types' section of the App Studio interface. On the left is a sidebar with icons for Overview, Case types (selected), Data, Channels, Explore Data, Users, and Settings. The main area has a search bar at the top with the placeholder 'Search case types...' and a result count of '4 case types'. Below the search bar is a table titled 'Case types' with four rows. The first row, 'Career Candidate1', is highlighted with a red border. The other three rows are 'Evaluate and Sell a Vehicle', 'Interview', and 'RV Calculation'. The background of the main area is light grey.

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

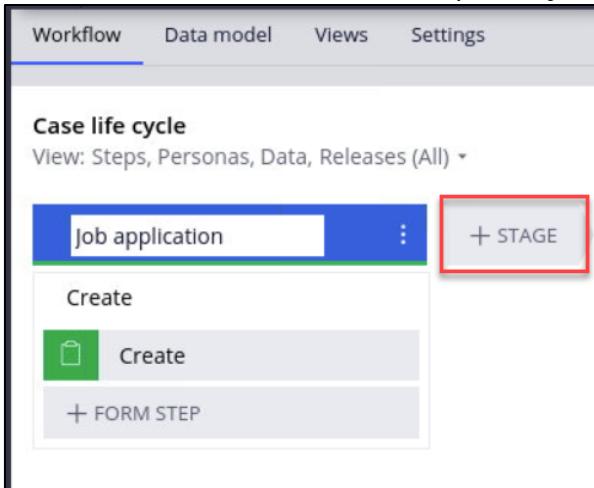
The screenshot shows the 'Case life cycle' view. At the top is a navigation bar with tabs: Workflow (selected), Data model, Views, and Settings. Below the tabs is a title 'Case life cycle' and a dropdown menu 'View: Steps, Personas, Data, Releases (All)'. The main area is divided into sections: 'Create' (which is highlighted with a green bar and contains a 'Create' button and a '+ FORM STEP' button), 'Personas & Channels' (with a '+ PERSONA' button), and a right-hand panel with a '+ STAGE' button.

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

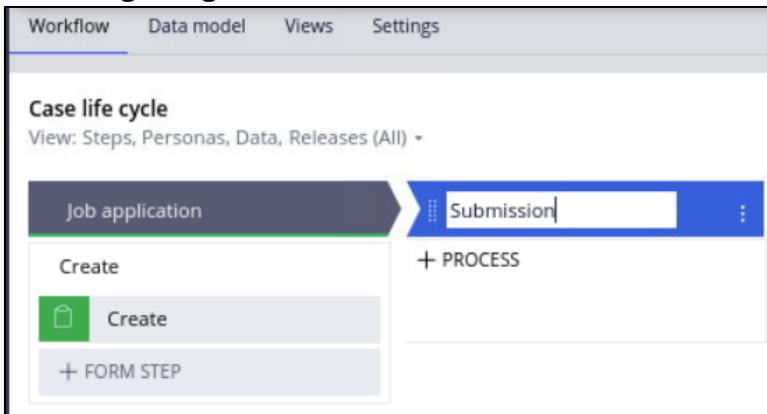
The screenshot shows the 'Case life cycle' view after renaming the stage. The 'Create' stage now has a blue header bar with the text 'job application'. The rest of the interface remains the same as the previous screenshot.

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.

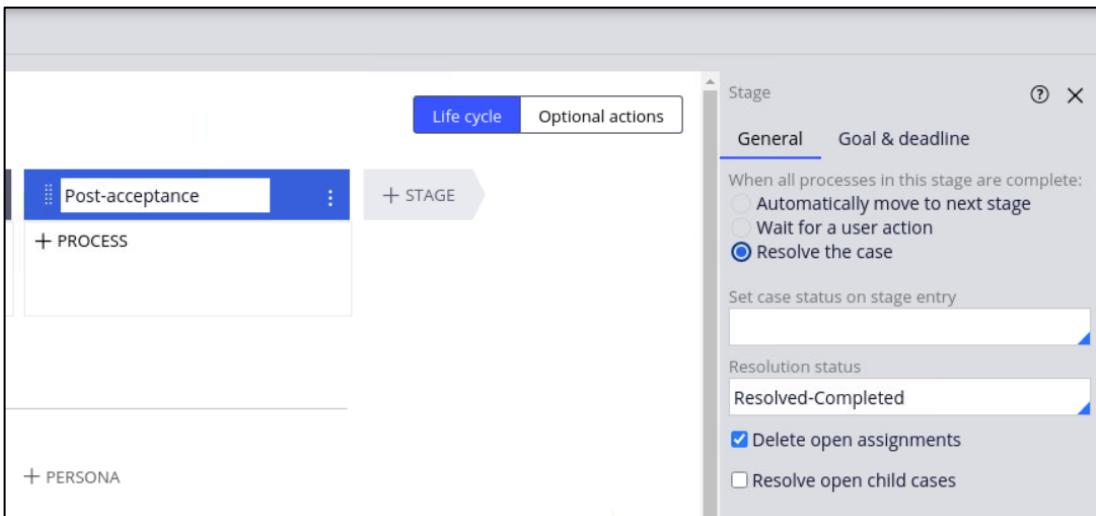
- Change primary stage #3 to **Recruiter review**.
- Change primary stage #4 to **Interview**.
- Change primary stage #5 to **HR review**.
- Change primary stage #6 to **Offer acceptance**.
- Change primary stage #7 to **Post-acceptance**.

8. Configure the **Post-Acceptance** stage to a resolution stage.

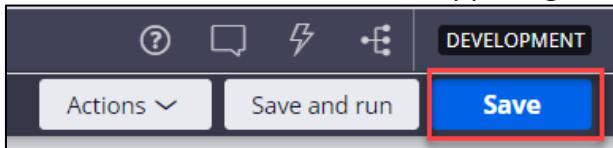
- Click **Post-Acceptance**.

Notice the **Stage** properties panel opens on the right.

9. On the **General** tab, select the **Resolve the case** radio button.



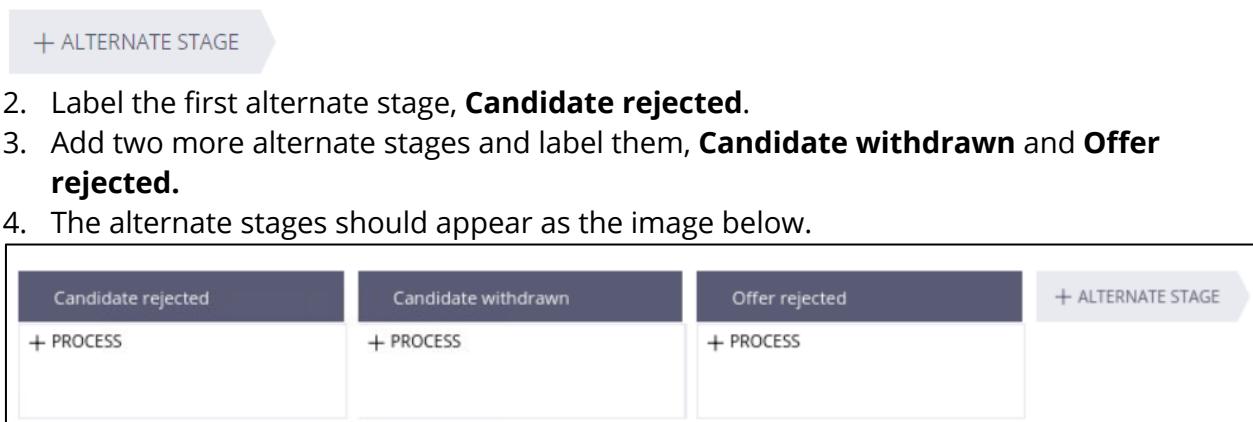
- Click the **Save** button in the upper right of the **App Studio**.



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

Task 3: Add alternate stages, detailed steps

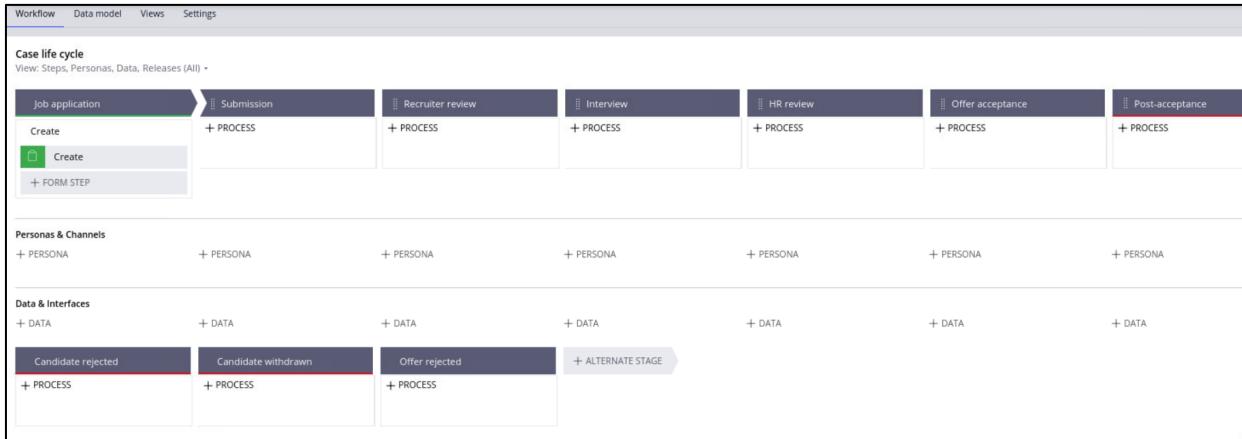
- Click the **+ ALTERNATE STAGE** button.



- Make the **Candidate rejected**, and **Candidate withdrawn** alternate stages resolution stages. (**REMINDER:** Refer to [Task 2](#), step #8 and # 9 if you need assistance.)
- Click **Save**.
- 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:

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

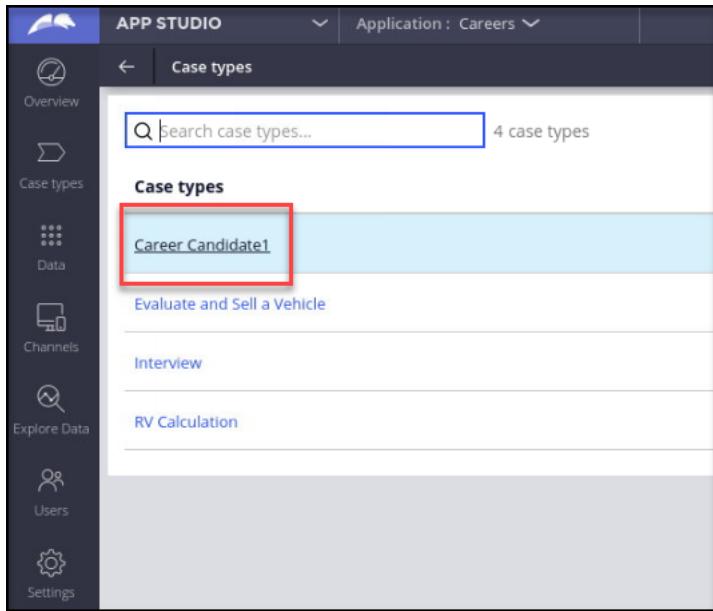


NOTE: If you have already enabled branch development in a previous lesson, confirm it is still pointing to the Career Candidate branch.

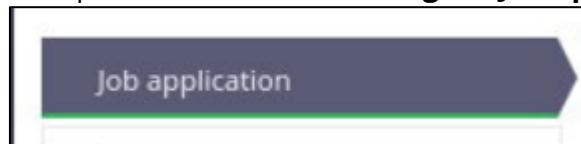
- If the branch development is off, move the slider to turn branch development on. From the **Branch** dropdown ensure that **CareerCandidate** is selected and click **Submit**.

Task 2: Add processes and steps to the stages

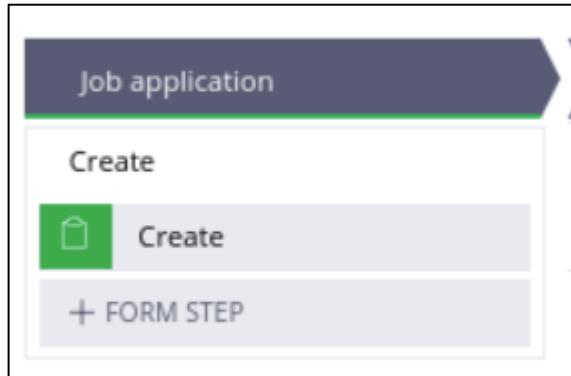
- In the **App Studio**, click the **Case types** explorer.
- Click the **Career Candidate1** case type to display the case designer.



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

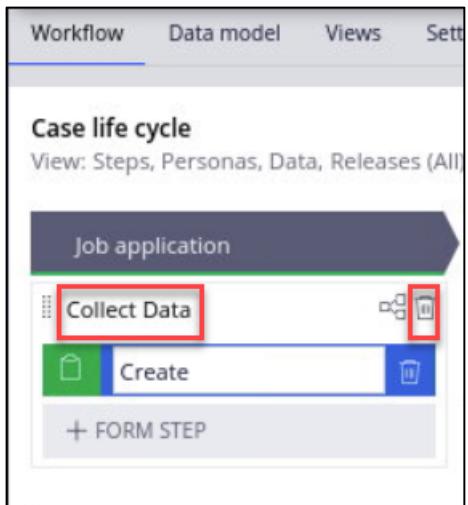


4. Between the **Job application** stage and step #1 is a white space with the label "**Create**". This is the **process label**. The label is associated with the process flow **CreateForm_Default** which was created automatically when a new case type is created.

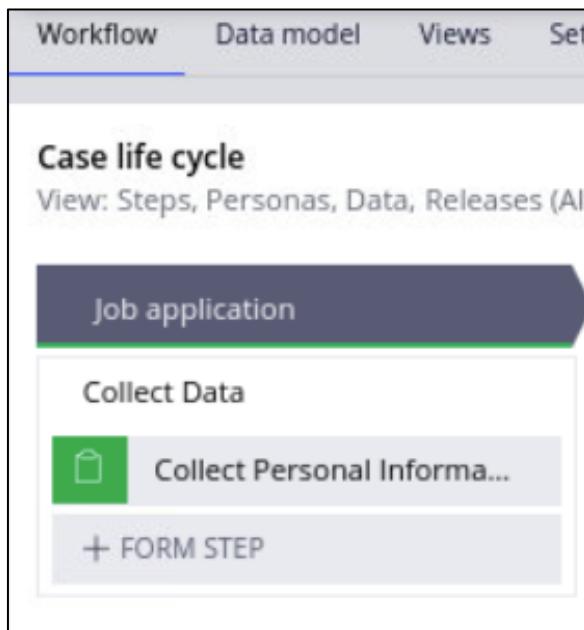


5. Rename the process label to **Collect Data**.

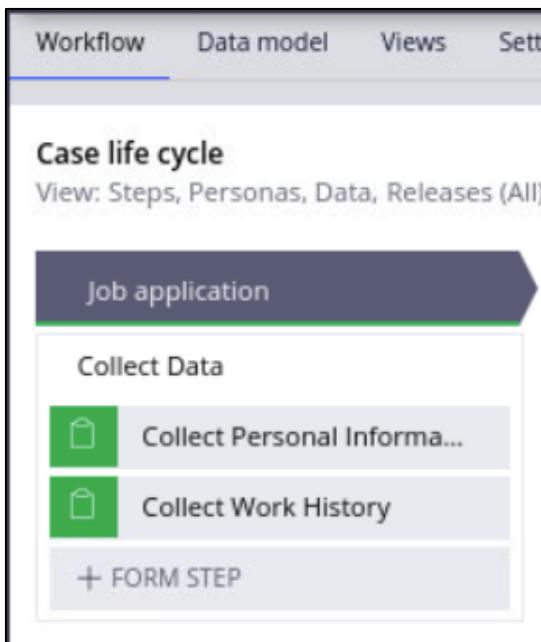
Note: The process can be deleted using a **Trash** icon beside the label and a new process can be added by adding a step or adding a process.



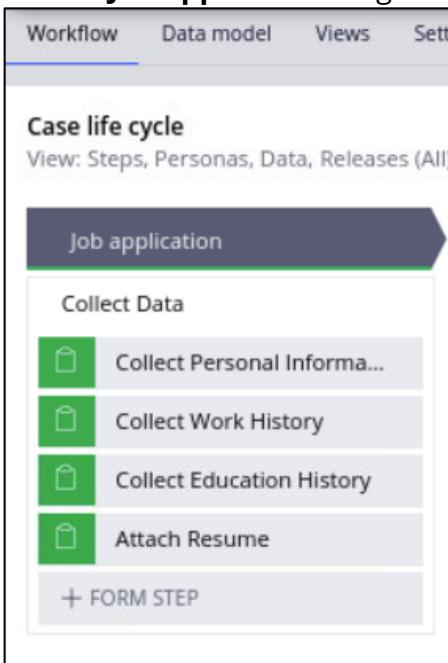
6. Rename the first step label to **Collect personal information** or delete the 1st step and add a step and label it to **Collect personal information**.



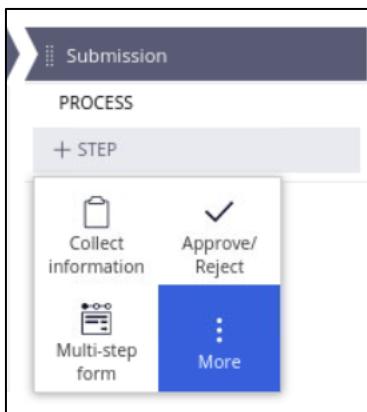
7. In the **Job Application** stage, **Click on + FORM STEP** and add the label **Collect Work History**.



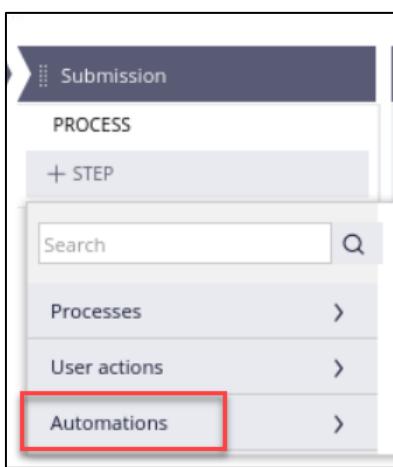
8. In the **Job Application** stage, repeat step 7 to add two more Collect Information steps. Label step 3, and 4 as follows:
 - a. **Collect Education History**
 - b. **Attach Resume**
9. The **Job application** stage should now appear as follows:



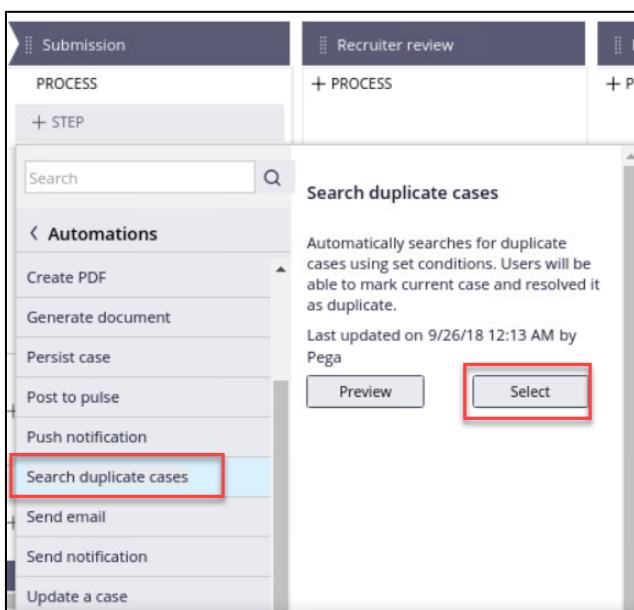
10. On the **Submission** stage, click **+ STEP** to add the first step.



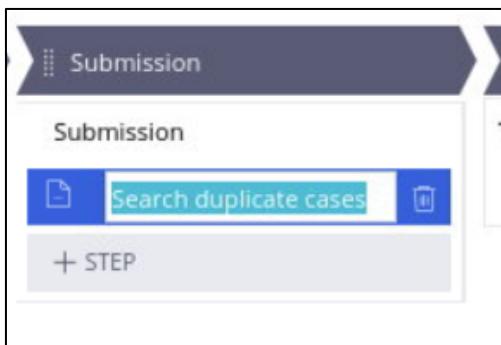
11. Select the **More** tile to view the list:



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

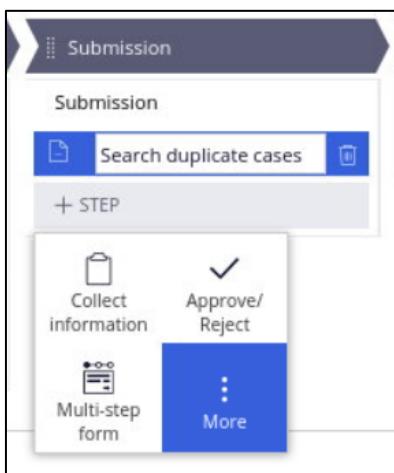


Keep the current label. We can change it later.

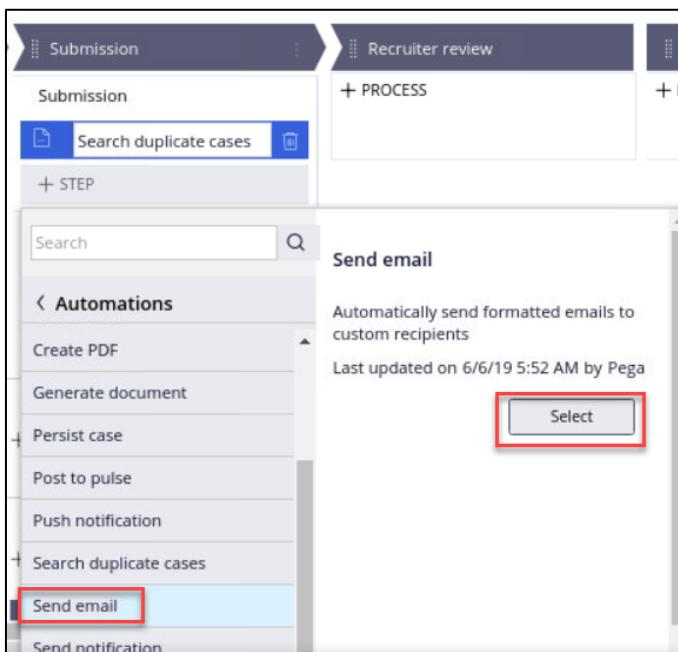


13. Add a second step by adding **+ STEP** in the **Submission** stage.

14. Select the **More** tile:

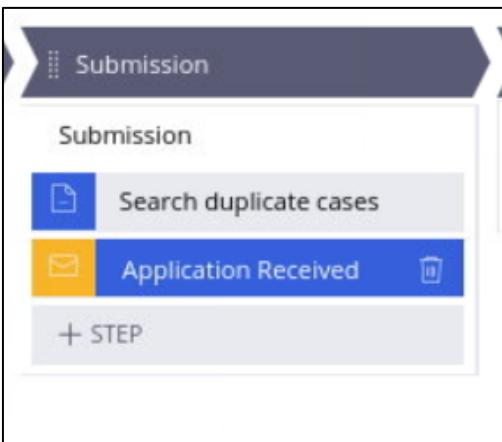


15. Select **Automations > Send email**, and click the **Select** button:



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.

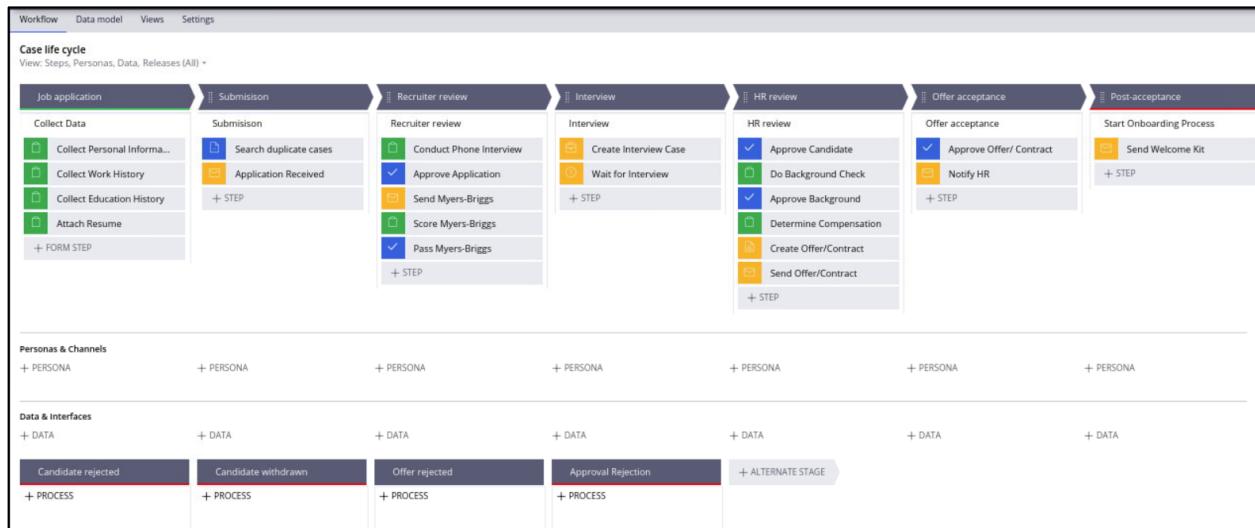
Using the following table, add processes and steps as identified by various stakeholders.

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	<ul style="list-style-type: none">• Conduct Phone Interview (Collect Info)• Approve Application (Approve)• Send Myers-Briggs (Send Email)• Score Myers-Briggs (Collect Info)• Pass Myers-Briggs (Approve)
Interview	Interview	<ul style="list-style-type: none">• Create Interview case (Create Case)• Wait for Interview (Wait)
HR review	HR review	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• Accept Offer/Contract (Approve)• Notify HR (Send Email)

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

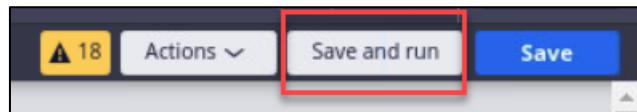
When completed, the case will look like the following image:



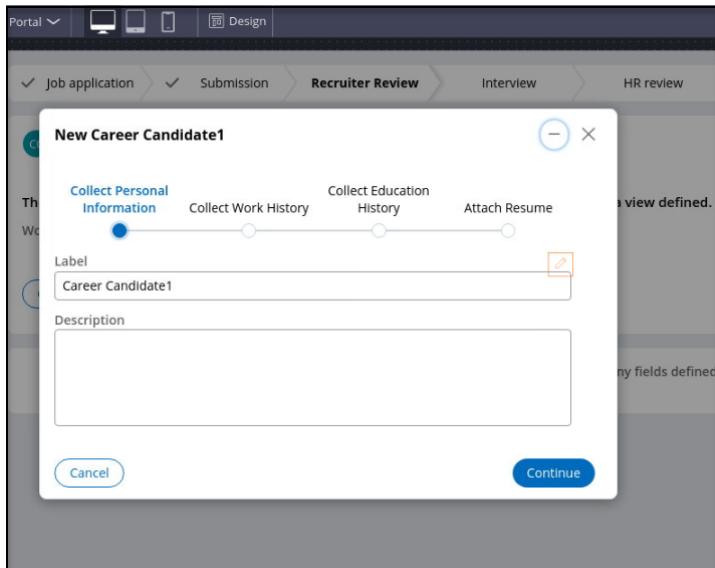
Click **Save**.

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:



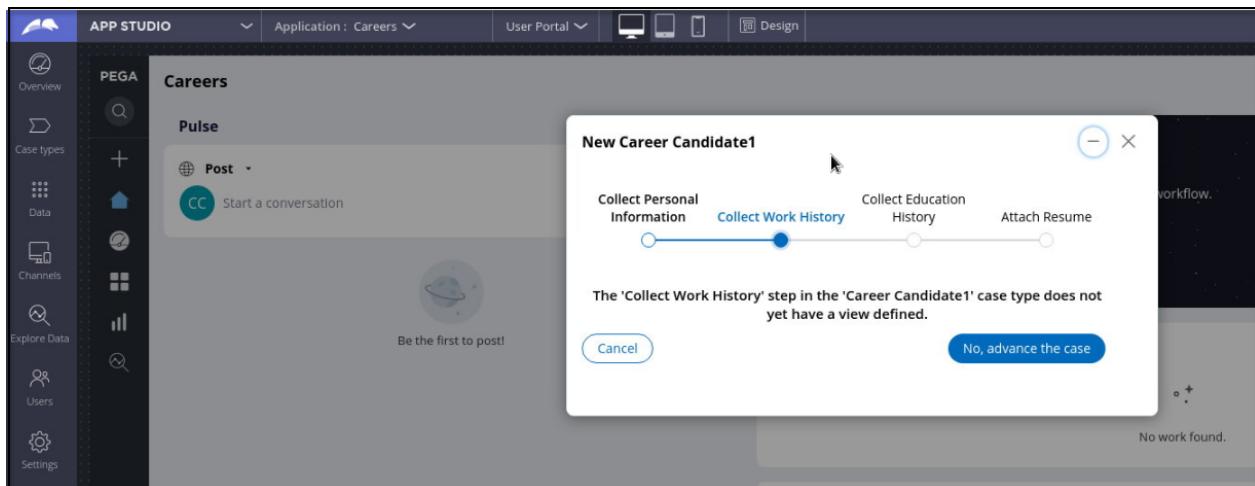
2. The **Job Application** stage, **Collect personal info** step, user view placeholder appears:



3. Click **Continue**.

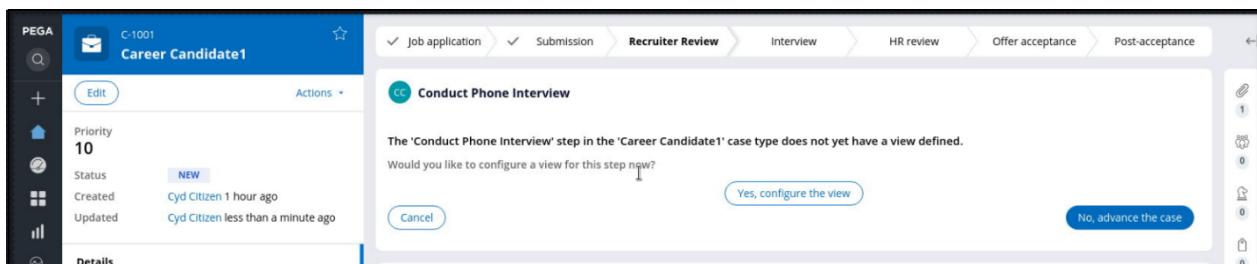
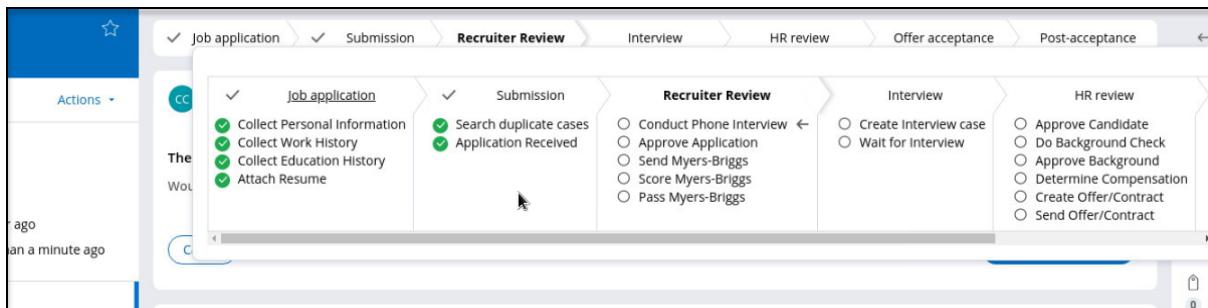
IMPORTANT: We'll learn how to configure user views in a future lesson. For now, we're just running the process with our stakeholders to make sure the process steps are in the proper order.

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.

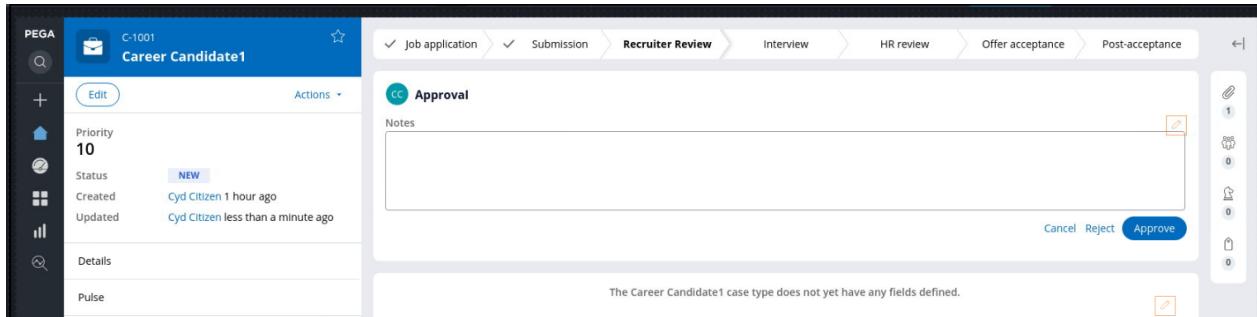
Note: Clicking on any stage name shows the completed steps with a green check mark in a green circle as shown below.



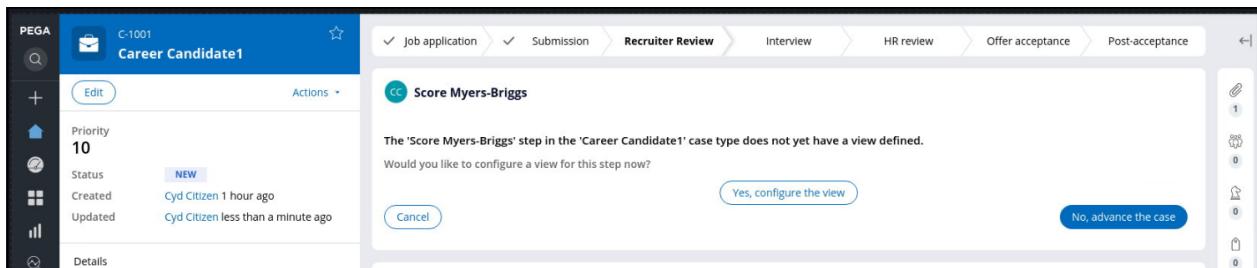
8. Click **No, advance the case** to move to the **Approval** step.

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.

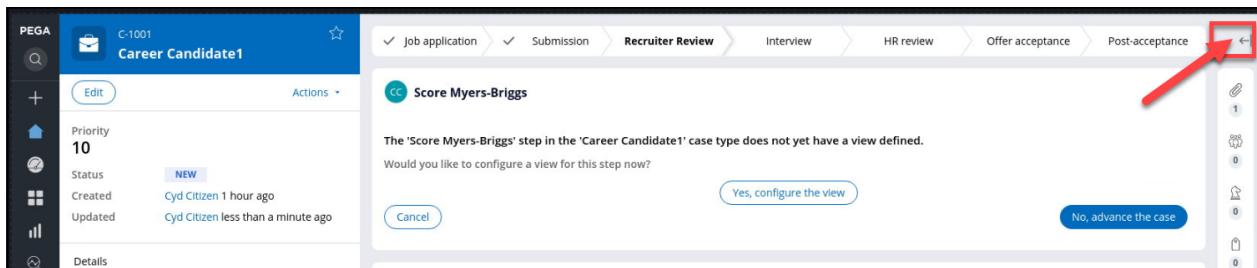


10. The following screen is displayed.



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

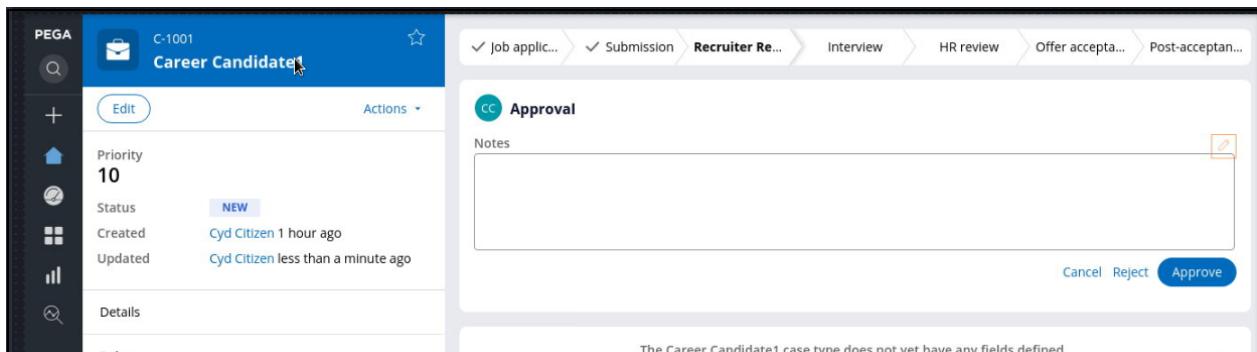
Then click the **Go** button.



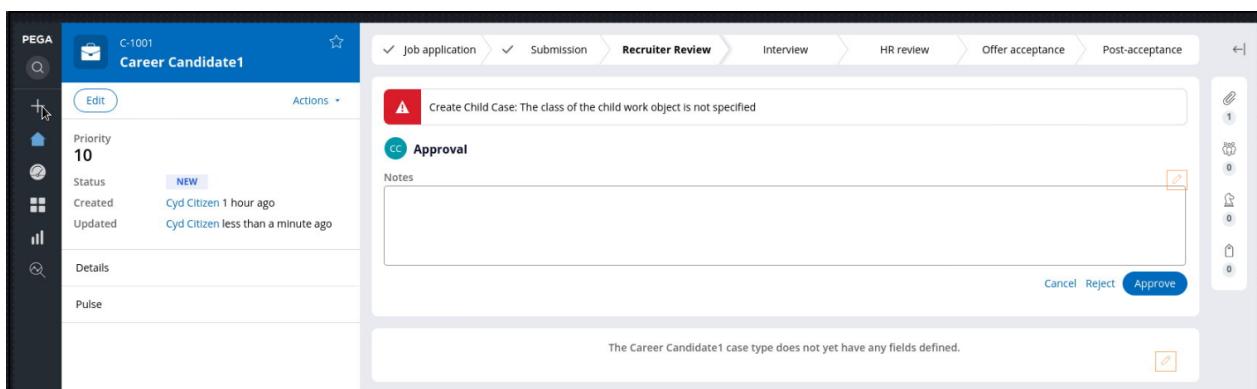
NOTE: The utility panel on the right side now indicates two emails have been registered. This is because of the two Send email automation steps that we passed along the way. We'll discuss how to create the email correspondence in a later lesson. If two emails are not displayed, click Actions > Refresh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

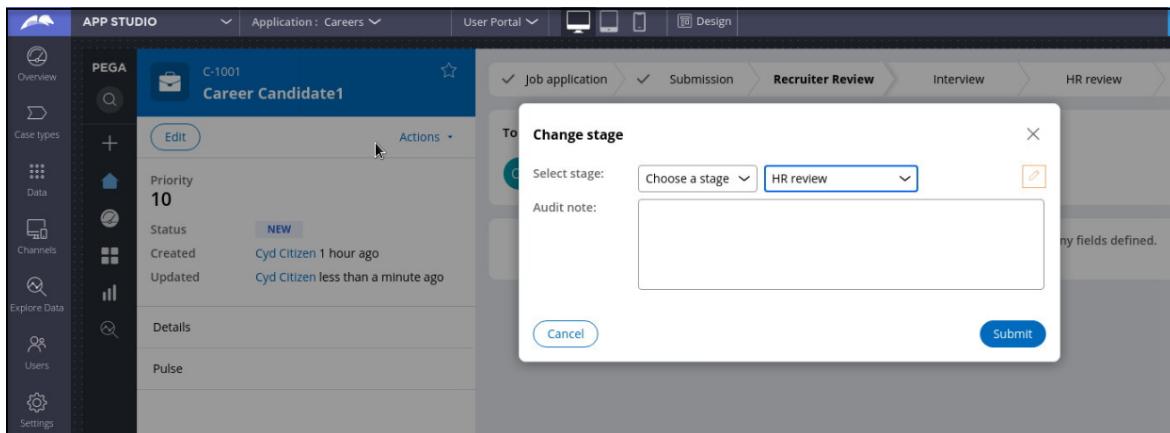


CAUTION: The Approval step won't advance the case due to the creation of the child case which hasn't been configured yet. You are asking the system to create an undefined case.

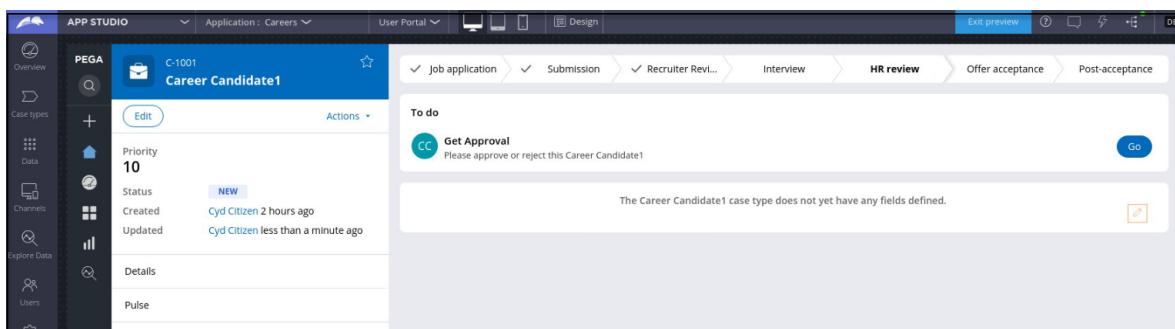
The Interview Stage (create case and wait shape) has not been implemented yet.

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

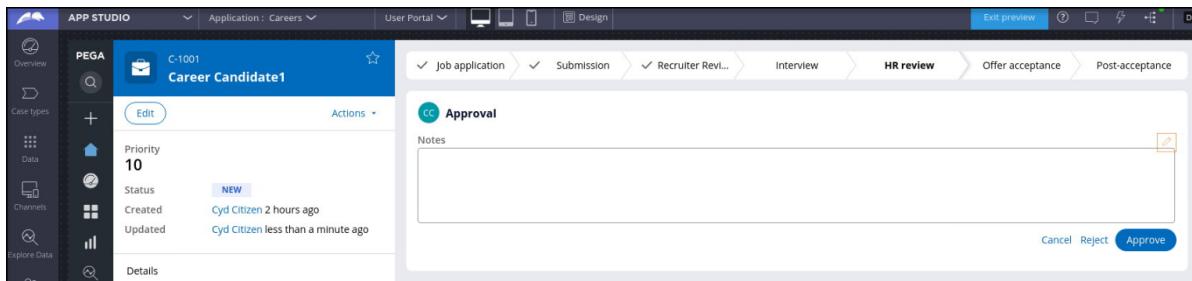
14. Click **Actions > Change Stage**. Select **Choose a stage > HR review** and click **Submit**.



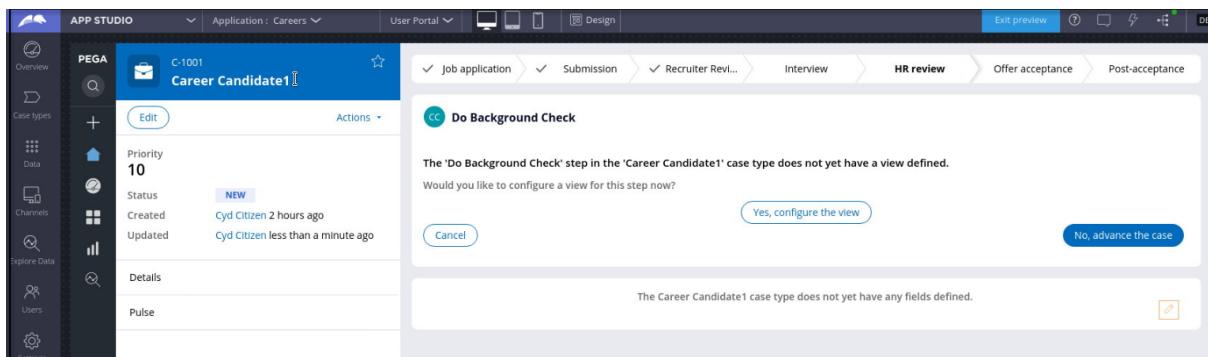
15. Click the **Go** button.



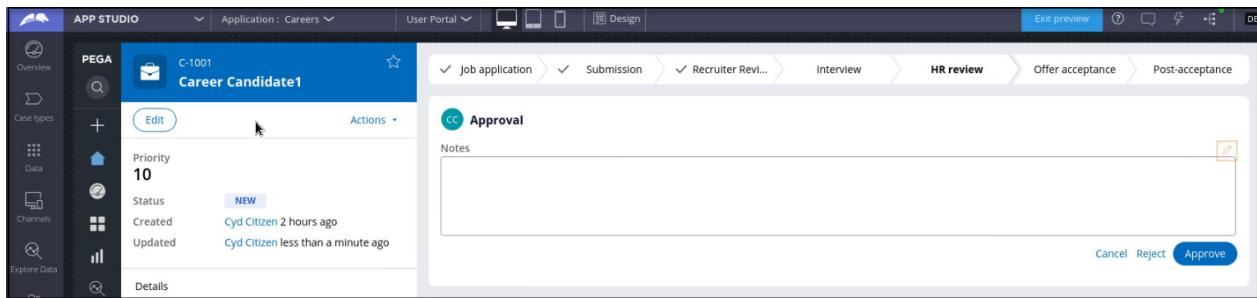
16. The first **Approval** view in the **HR Review** stage appears. Click **Approve** to continue.



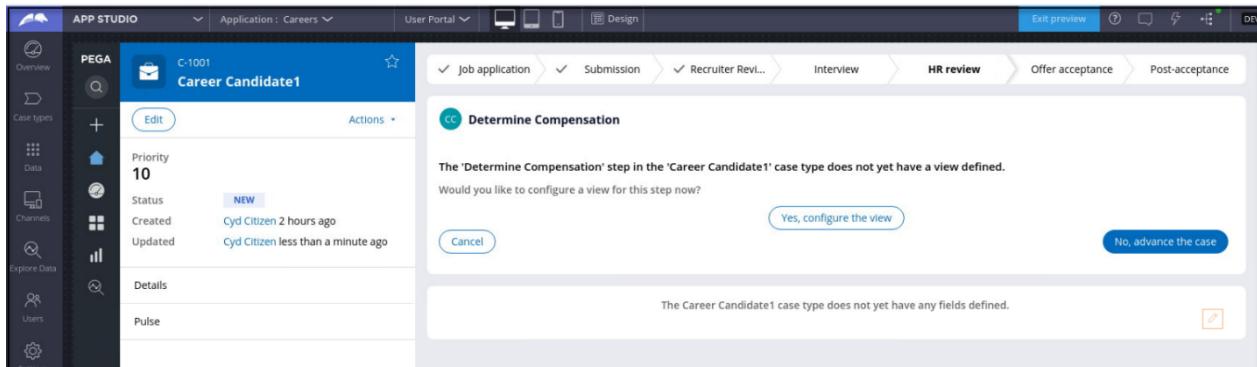
17. The **Do Background Check** step appears. Click **No, advance the case** to continue.



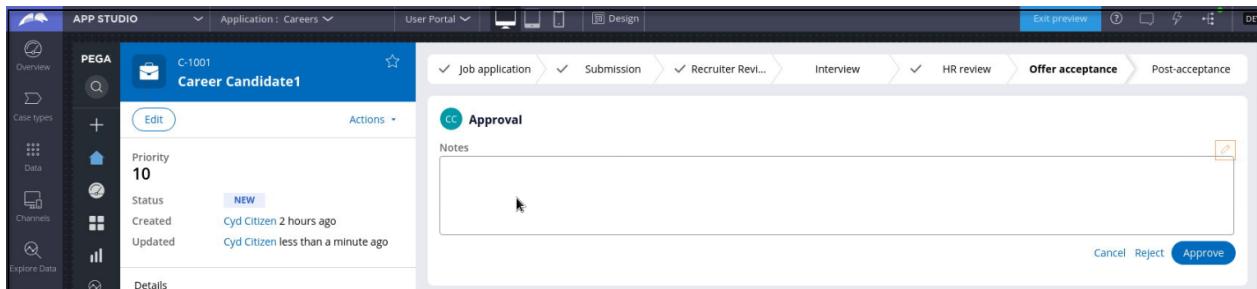
18. The second **Approval** view in the **HR Review** stage appears. Click **Approve** to continue.



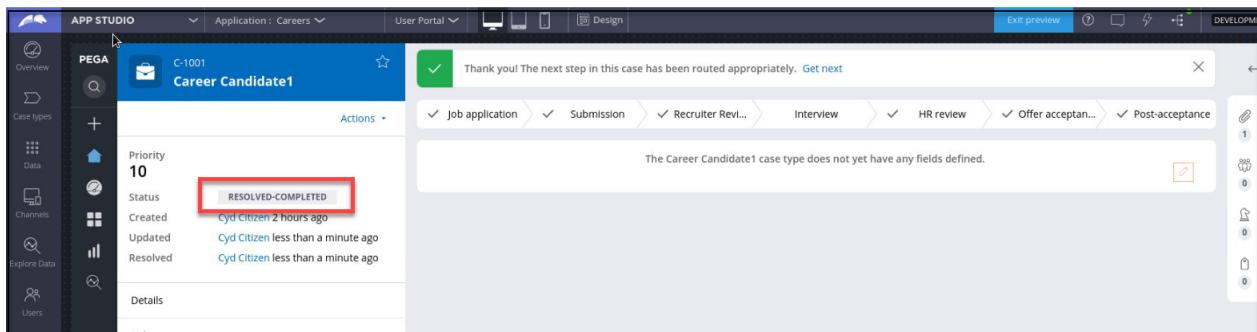
19. The **Determine Compensation** step appears. Click **No, advance the case** to continue.



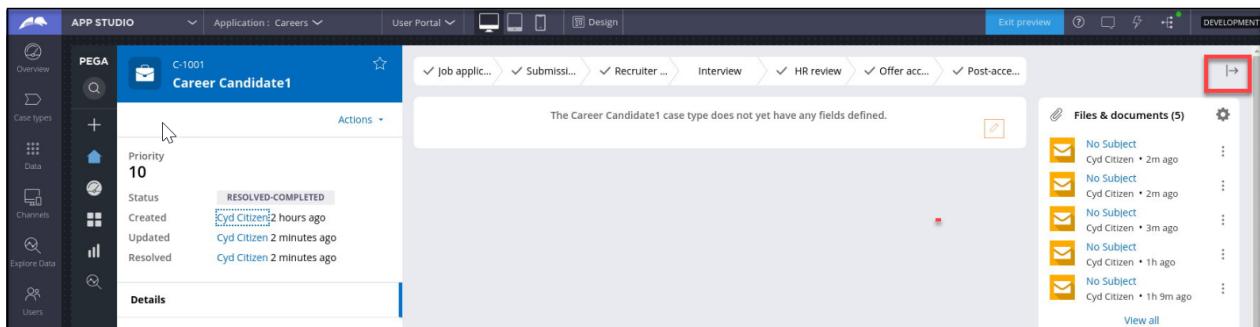
20. The **Approval** view in the **Offer Acceptance** stage appears. Click **Approve** to continue.



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.



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

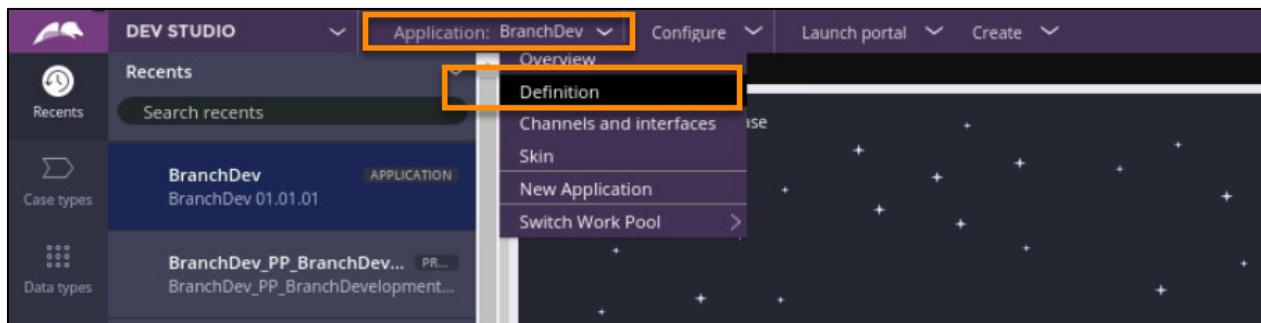
Merge the branch and verify the result.

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 **BranchDevLab** branch to open the branch.

A screenshot of a 'Development branches' list. It includes a header 'Development branches', a '+ Add branch' button, and a list of branches. One branch, 'BranchDevLab', is highlighted with a blue selection bar and has a small edit icon next to it.

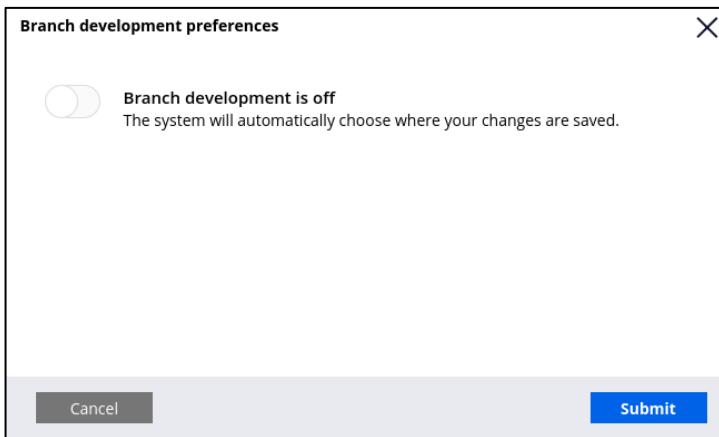
- d. Check the rules that are part of the current branch and their respective ruleset. The Total number of rules is 1.

A screenshot of the 'Branch: BranchDevLab' details page. The 'Content' tab is selected, showing a table with one row: 'BranchDevLab 01-01-01' (Name), 'Product' (Type), 'BranchDev' (Ruleset), and 'Admin@BranchDev' (Updated by). To the right, there's a sidebar with branch details: 'Description: BranchDevLab', 'Author: Admin', 'Total rules: 1', and a 'Previous reviews' section which is empty.

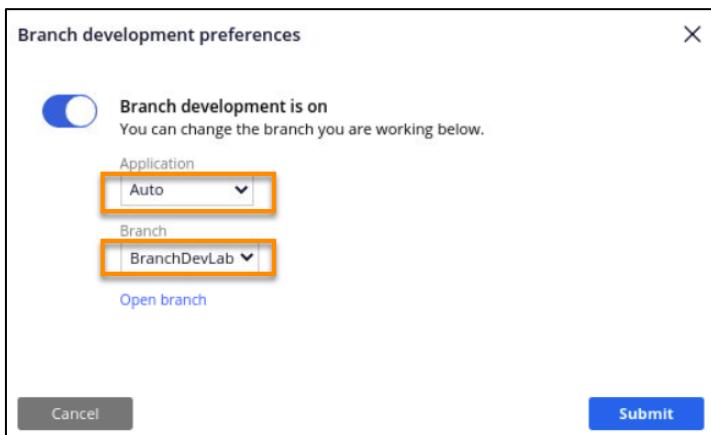
3. From the title bar click the Toggle branch development button to open the **Branch development preferences**.

A screenshot of the 'Branch: BranchDevLab' details page. The 'DEVELOPMENT' toggle button in the top right is highlighted with a yellow box. The rest of the page is identical to the previous screenshot, showing the branch details and content table.

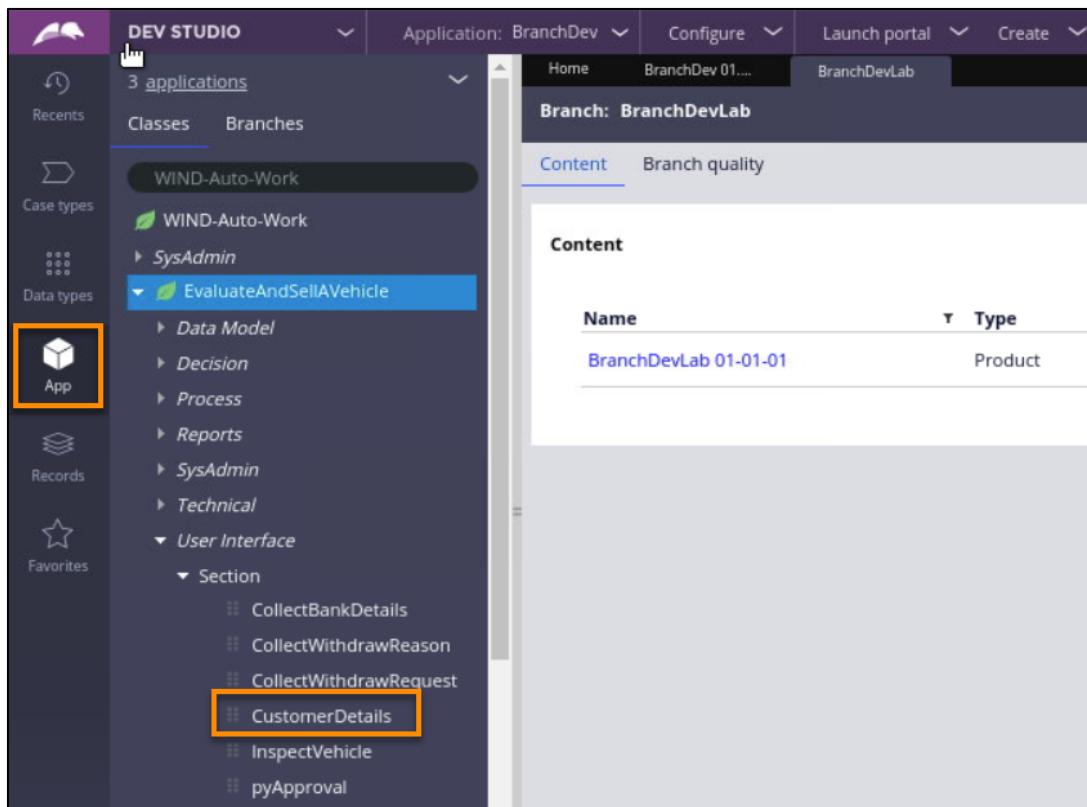
4. The following appears:



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**.

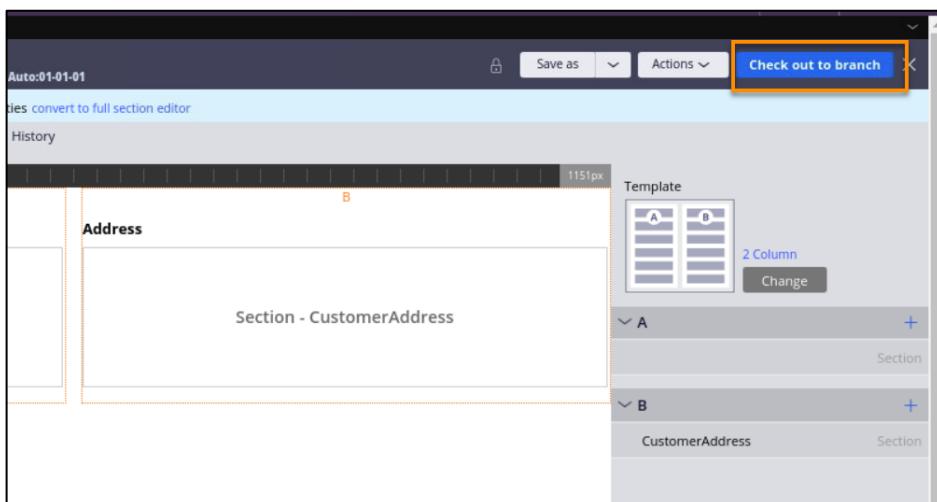


9. Note the section is locked and is part of the ruleset **Auto:01-01-01**. Since the ruleset is locked there is no way you can modify it straight away. You have to check it out to a branch, i.e., to the branch you have selected a few steps ago.

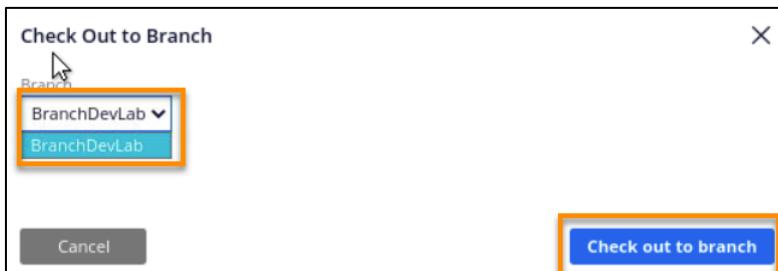
Section: Customer Details [Available]

CL: WIND-Auto-Work-EvaluateAndSellAVehicle ▾ ID: CustomerDetails RS: Auto:01-01-01

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



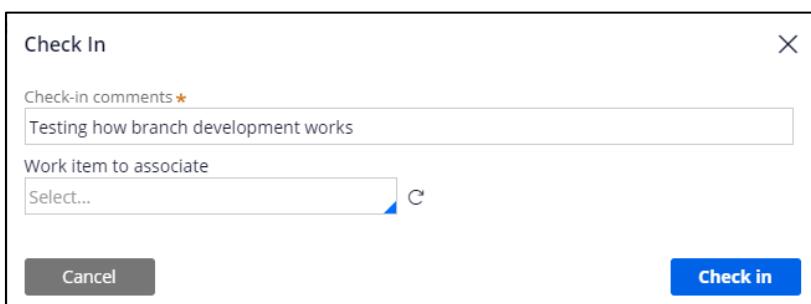
11. Click **Check out to branch**



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

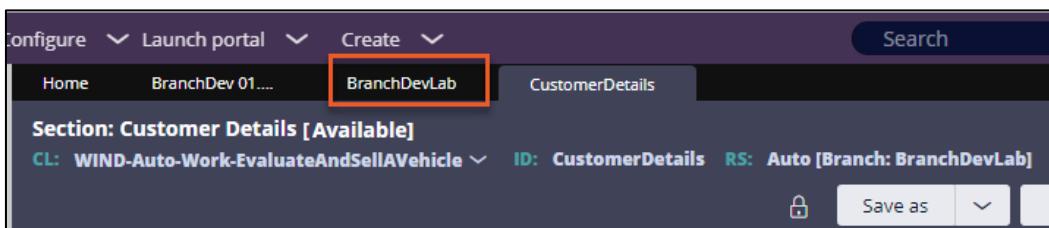


13. Click **Check in** to check in the rule into the branch ruleset to be able to merge later.
Enter check in comments and check in the rule. **"Testing how branch development works"**

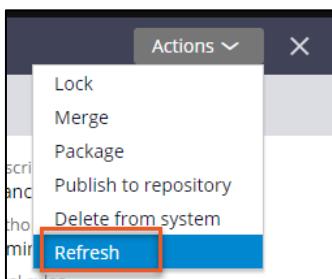


Task 2: Merge the branch

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



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



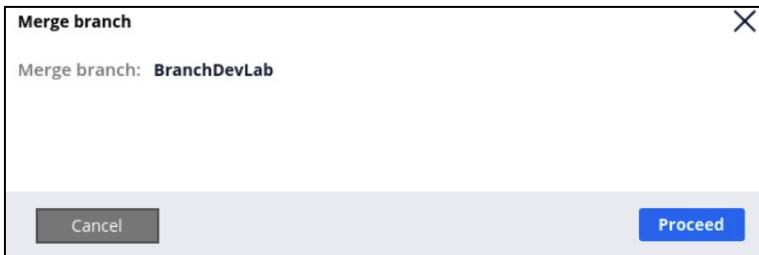
3. You will see a list of three rules to merge.

The screenshot shows a user interface for managing rulesets. At the top, there are tabs: Home, BranchDev 01..., BranchDevLab, and CustomerDetails. The Branch: BranchDevLab tab is selected. Below the tabs, there's a breadcrumb trail: Content > Branch quality. On the left, a sidebar titled 'Content' lists three items: 'BranchDevLab 01-01-01' (Product, Ruleset BranchDev), 'CustomerDetails' (Section, Class WIND-Auto-Work-E..., Ruleset Auto), and 'CustomerDetails' (View, Class WIND-Auto-Work-E..., Ruleset Auto). To the right, there's a summary panel with details: Description BranchDevLab, Author Admin, Total rules 3, Previous reviews (Create review), and No items.

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

This screenshot is similar to the previous one, but the 'Actions' dropdown menu is open on the right side. The 'Merge' option is highlighted with a red box. Other options in the menu include Lock, Package, Publish to repository, Delete from system, and Refresh. The summary panel on the right shows the same information as before.

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**.

Merge Branches

BranchDevLab

Source ruleset	Target ruleset
! BranchDev Total candidates: 1 Source checked out: 0	BranchDev No conflicts or warnings found. Target checked out: 0
	Create new version Version 01-01-03 1 Password Lock target after merge Enter password (recomm)

Source ruleset	Target ruleset
! Auto Total candidates: 2 Source checked out: 0	Auto 0 Conflicts, 2 Warnings Target checked out: 0
	Create new version Version 01-01-04 1 Password Lock target after merge Enter password (recomm)

Keep all source rules and rulesets after merge

Cancel Merge

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

Merge Branches (pxW-1)

Overview Audit

All Rulesets successfully merged!

Source	Target	Target version	Status
BranchDev [Branch: BranchDevLab]	BranchDev	01-01-03	Completed Merged 1 of 1 BranchDev:01-01-03 is unlocked.
Auto [Branch: BranchDevLab]	Auto	01-01-04	Completed Merged 2 of 2 Auto:01-01-04 is unlocked.

View merge results Close

Status
Resolved-Completed

Urgency
10

Created by
Admin

Created
3 minutes ago

Last Updated By
Admin

Last Update
about a minute ago

Attachments

Work Parties

Originator
Admin

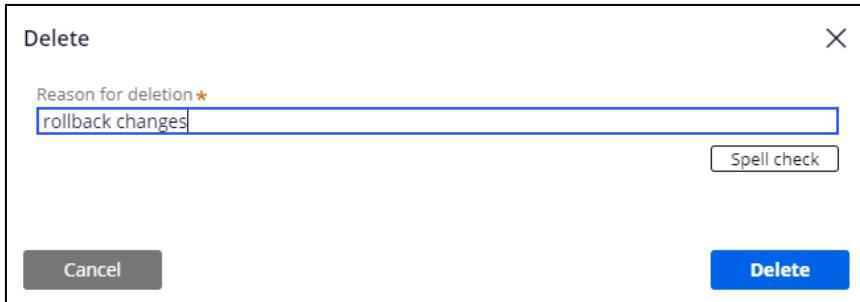
8. Note there are two rules in version **01-01-04**. To delete the two rules you have just merged, click on the number **2** on the right of version **01-01-04**.

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

Rule type	Rule name	Applies to	Available	Updated by	Last updated	Circumstance
Section	CustomerDetails	WIND-Auto-Work-EvaluateAndSellAVehicle	Yes	Admin	4 minutes ago	
View	CustomerDetails	WIND-Auto-Work-EvaluateAndSellAVehicle	Yes	Admin	4 minutes ago	

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.

- Click on the **Actions** button and then refresh.
- Ensure there are no more rules in version **01-01-04**.

The screenshot shows the 'Edit Ruleset: Auto RuleSet' interface. At the top, it says 'ID: Auto'. Below that is a navigation bar with tabs: 'Versions' (which is selected), 'Security', 'Category', and 'History'. Under 'Validation mode', there are two options: 'Application Validation' (selected) and 'Ruleset Validation'. On the right, under 'Rule information', it shows 'Checked out 0' and 'Rule count 313'. The main area displays a table of secure versions:

Secure Version	Description	Approval required	Checked out	All rules
01-01-01	Auto 01-01-01	<input type="checkbox"/>	0	250
01-01-02	Auto:01-01-02	<input type="checkbox"/>	0	9
01-01-03	Auto:01-01-03	<input type="checkbox"/>	0	17
01-01-04	Version 01-01-04	<input type="checkbox"/>	0	0

Below the table, a message says 'IN APPLICATION VALIDATION MODE 'REQUIRED RULESETS' ARE DISABLED'. It shows the 'Effective Start Date' as '3/16/2021' and has buttons for 'Unlock and Save', 'Save', and 'Delete'.

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

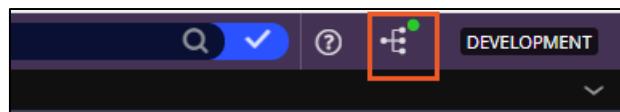
14. Navigate back to the **BranchDev** Application tab. Open the **BranchDev** ruleset from the BranchDev application by clicking on the gear icon next to it.

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.

Careers [Edit](#)
DEVELOPMENT <http://localhost:9080/pnweb/app/Careers/>
auto
Read more
Version: Pega platform 8.6.0
About Application documents Export Application profile Manage
Personas [Manage \(8\)](#)
Candidate Candidate:Job applicant
Careers:Administrators Generated by New Application API
Careers:Author Generated by New Application API
Careers:Managers Generated by New Application API
Car Ger
Channels [Manage \(5\)](#)
User Portal Default employee-facing portal for Cosm... Case Manager Case Worker User Mobile App Application Pe API
Case types [Manage \(4\)](#)
Career Candidate
Job Application Submission Recruiter review Interview HR review Offer acceptance Post-acceptance
Evaluate and Sell a Vehicle
Create Request ManagerReview ExpertVisit Deal Handover OwnershipTransfer
Interview
Interview Feedback Complete

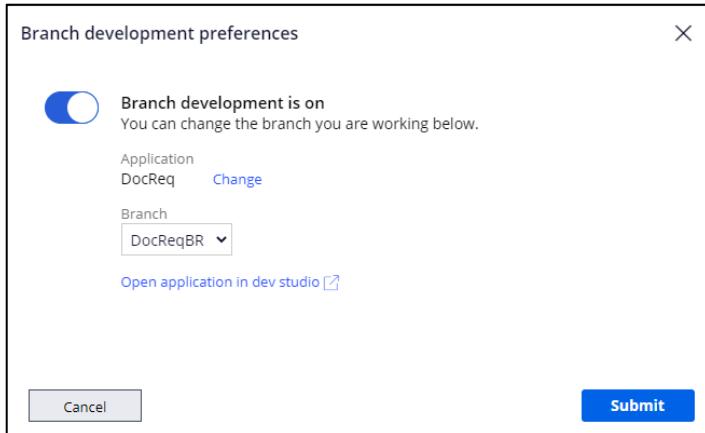
Pega Infinity What's new in 8.6.07
Application layers

Careers 01.01.01
Auto 01.01.01
Cosmos Rules 03.01
Load more

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.

'BUILT ON' features are those features that were likely delivered in the previous release (MLP). We can add new user stories to these features by simply adding them to the new application profile 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**:

The screenshot shows the 'Add from existing features' dialog. At the top, there is a 'Feature*' dropdown menu with a placeholder 'Select...'. Below it is a search bar containing the text 'Interview'. A list of items is displayed, with 'Career Candidate' highlighted by a red rectangle and a cursor icon pointing to its right. Other items in the list include 'Comment' and 'Comment'. At the bottom of the dialog are three buttons: 'Cancel', 'Submit & add another', and a larger blue 'Submit' button.

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)

The screenshot shows the 'Add from existing features' dialog with several fields highlighted by red rectangles. The 'Feature*' dropdown at the top contains 'Career Candidate'. Below it, the 'Category' dropdown is set to 'Case type'. To the right, the 'Release' dropdown is set to 'MLP 2' and the 'Complexity' dropdown is set to 'Medium'. The 'Comment' area is a large text box with a blue border, currently empty. At the bottom, the 'Mark as done' checkbox is unchecked. The 'Submit & add another' and 'Submit' buttons are at the bottom, with 'Submit & add another' highlighted by a red rectangle.

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)

Add from existing features

Feature *

Interview

Interview

Category

Case type

Release

MLP 1

Complexity

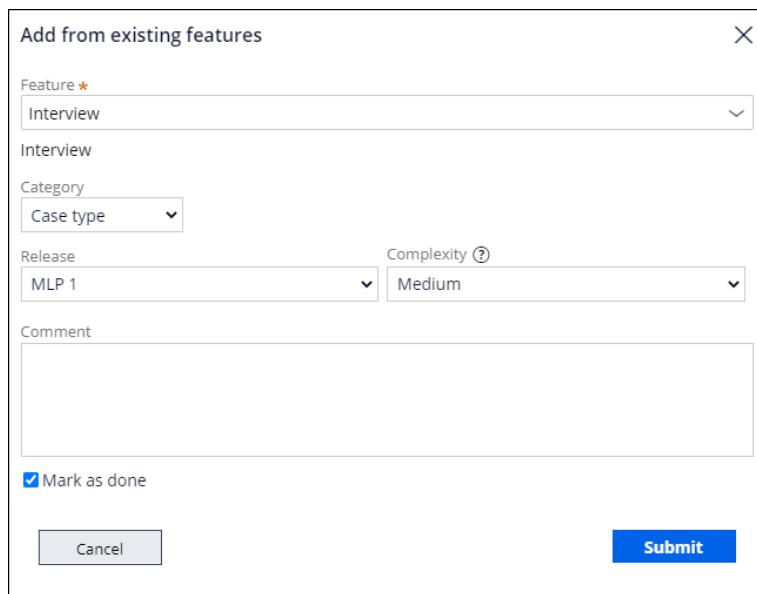
Medium

Comment

Mark as done

Cancel

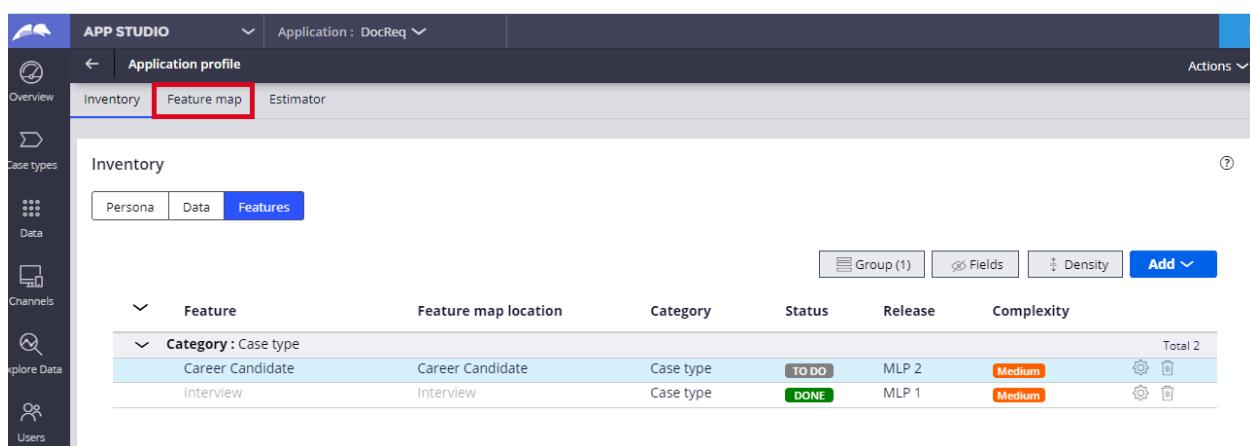
Submit



10. Click **Submit**.

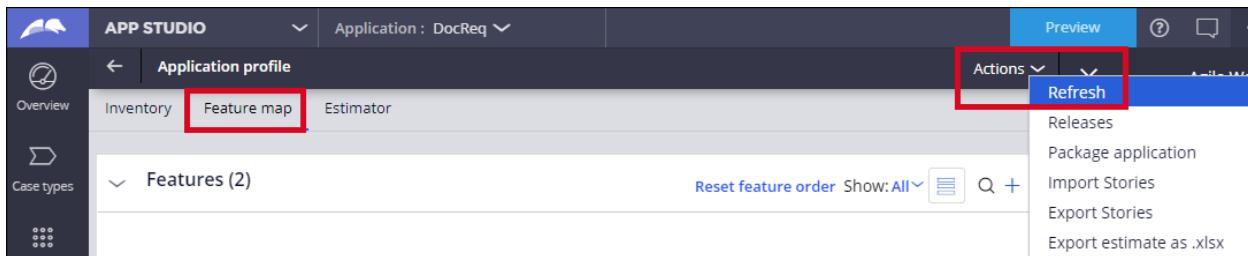
11. The Inventory of Features should now appear like the following image:

Inventory						
Feature	Feature map location	Category	Status	Release	Complexity	Total
Career Candidate	Career Candidate	Case type	TO DO	MLP 2	Medium	1
Interview	Interview	Case type	DONE	MLP 1	Medium	1

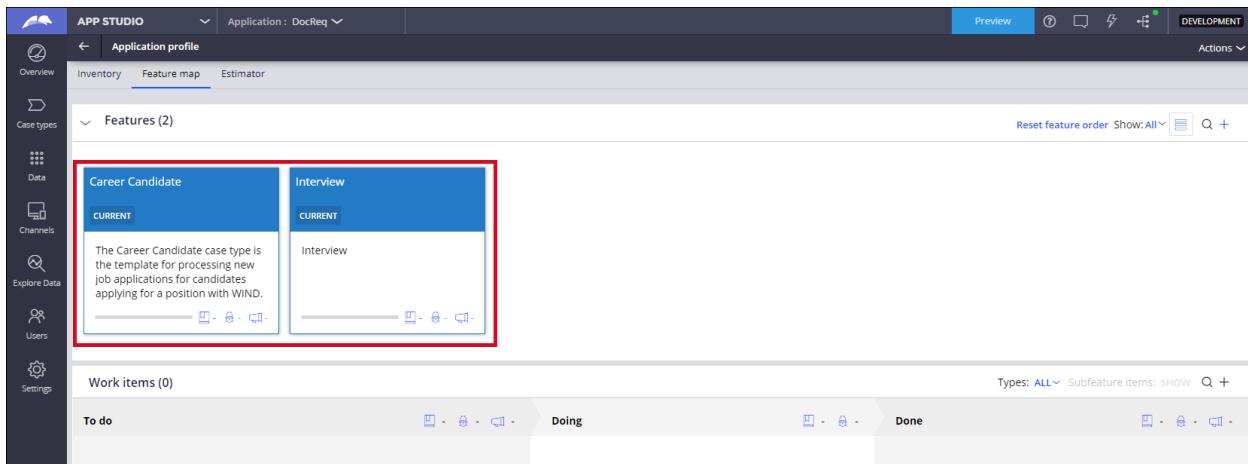


12. Select the **Feature map** tab.

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

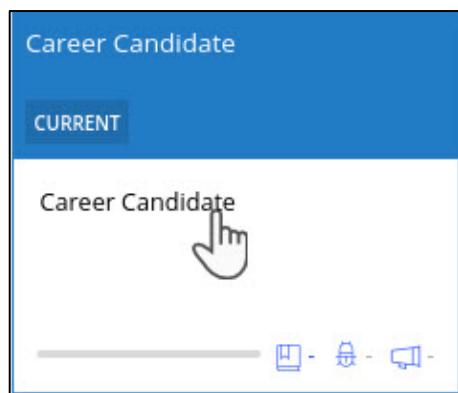


14. Both main features have now been changed from **BUILT ON** to **CURRENT**:



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

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



The following screen is displayed:

This screenshot shows the Pegasystems App Studio interface. The top navigation bar includes 'APP STUDIO', 'Application : Careers', 'Preview application', and a 'DEVELOPMENT' dropdown. On the left, a sidebar lists 'Overview', 'Case types', 'Data', 'Channels', 'Users', and 'Settings'. The main content area is titled 'Feature map' under 'Inventory'. It shows 'Features (2)' for 'Career Candidate'. A sub-section for 'Career Candidate' displays the 'Edit description' link, which is highlighted with a red box. Below it, the text 'in Careers:01.01.01 Updated by Admin@Careers (25 days ago)' is visible. At the bottom, there's a section for 'Subfeatures (0)' and a 'Show: All' dropdown.

15. Click **Edit description**.

This screenshot shows the same 'Feature map' view as the previous one, but the 'Edit description' link for the 'Career Candidate' feature is now highlighted with a red box.

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**.

This screenshot shows the 'Edit description' dialog box. The 'Current description' field contains the text: "The Career Candidate case type is the template for processing new job applications for candidates applying for a position with WIND in 2022." This text is also displayed in a preview pane on the right. Below the description, there's a note: "Version Careers:01.01.01 description". Underneath the description field, there's a section for "Explain the reasons for the changes to this feature.*" with a red box around the input field. The input field contains the text "MLP 2". At the bottom right of the dialog is a blue "Submit" button.

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.

The screenshot shows the Pegasystems interface for managing case types. At the top, there's a navigation bar with 'Main' and 'Career Candidate'. Below it, a sub-header 'Career Candidate' with a blue link. To the right is an 'Actions' dropdown. The main content area contains a brief description of the Career Candidate case type: 'The Career Candidate case type is the template for processing new job applications for candidates applying for a position with WIND in 2022.' Below this is a 'Edit description' link. A section titled 'Reasons for change' lists 'MLP 2'. At the bottom, it shows the last update was 'in Careers:01.01.01 DocReq : 01.01.01 Updated by Admin@DocReq (17 minutes ago)'. The 'Subfeatures (0)' section is highlighted with a red border. To its right is a toolbar with 'Show: All' and icons for creating (+), deleting (-), and filtering (grid).

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

The screenshot shows a 'Create feature' dialog box. It has fields for 'Name' (with a red asterisk) and 'Description'. A 'Create' button is at the bottom. The 'Name' field is highlighted with a blue border.

20. Add the following information to the **Create feature** fields.
- In the **Name** field, enter **Job application** to match the stage this subfeature describes.
 - 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**.

Name ★
Job application **a.**

Description
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 **b.**

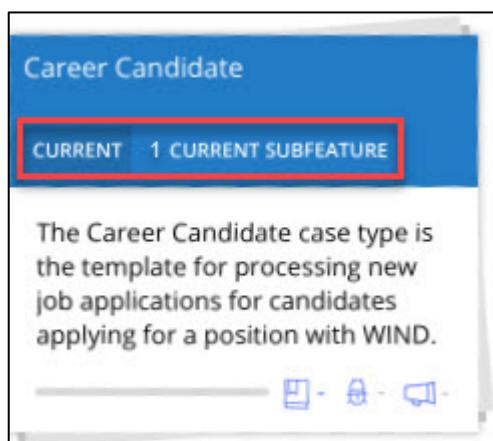
The system searches for duplicate applications for the same candidate and position selected.
Only one application per position of interest is accepted. Duplicates will be rejected.
The system will automatically send an email response to the candidate alerting them that their job application has been received.

c. **Create**

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



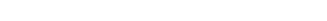
22. Note the change in the Career Candidate main feature tile. It now indicates there is 1 current subfeature:



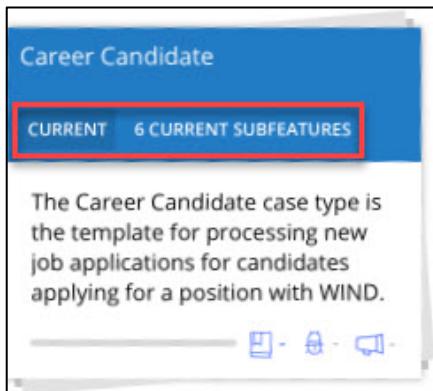
23. Repeat steps 19-23 to add more sub-features to document the five remaining Career Candidate primary stages. Use the information in the following table for the name and description of each subfeature:

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: <ol style="list-style-type: none"> 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:

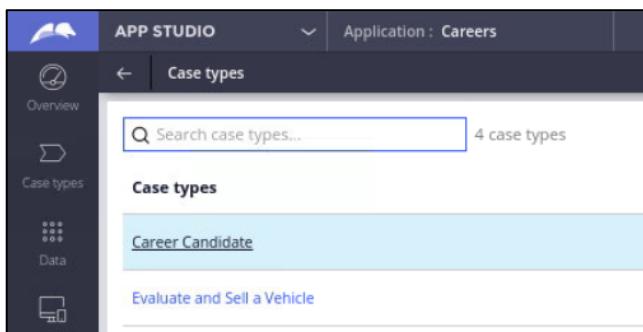
Subfeatures (6)				Show: All   
Name	Version	Current subfeatures	Progress	
Job application	CURRENT	--	   	
Recruiter review	CURRENT	--	   	
Create Interview Case	CURRENT	--	   	
HR review	CURRENT	--	   	
Candidate accepts offer	CURRENT	--	   	
Post-acceptance steps	CURRENT	--	   	

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**:

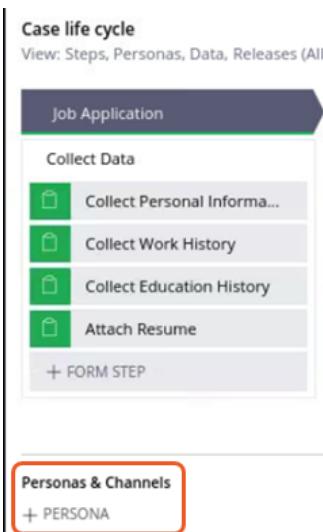


Task 3: Associate user personas to the case type stages

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	<ol style="list-style-type: none"> 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.

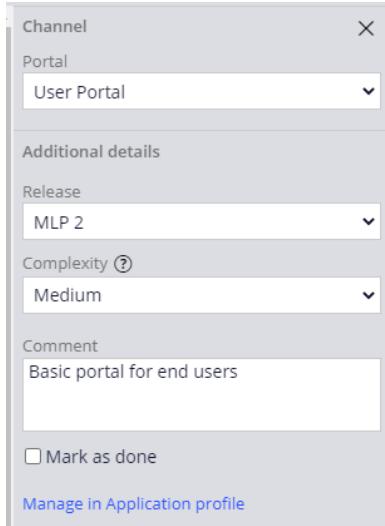
NOTE: When selecting or creating a new persona, additional details can be added in the properties panel to the far right of the workspace.



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**.

The screenshot shows the 'Personas & Channels' panel. It displays a list of channels: 'Candidate' (selected), 'User Portal' (highlighted in blue), and '+ CHANNEL'. Below the list is a button '+ PERSONA'.

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	User Portal
Offer rejected	HR Representative	Case Manager

Click **Save**.

The screenshot shows the Case Designer interface for a 'Career Candidate' case type. The 'Case life cycle' section displays a series of stages: Job application, Submission, Recruiter review, Interview, HR review, Offer acceptance, and Post acceptance. Each stage contains specific steps, such as 'Collect Personal Information', 'Search duplicate cases', or 'Approve Candidate'. The 'Personas & Channels' section at the bottom lists various roles (Candidate, Recruiter, Careers:Manager, HR Representative) and their corresponding channels (User Portal, Case Manager), with some entries marked as 'MLP2'.

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:

The screenshot shows the left sidebar of the App Studio interface. The sidebar has several icons: Overview (document), Case types (two arrows), Data (grid), Channels (monitor), Users (person), and Settings (gear). The 'Case types' icon is selected. The main area is titled 'Case types' and shows a search bar with 'Search case types...' and a result count of '4 case types'. Below the search bar is a list of case types: 'Career Candidate' (highlighted in blue), 'Evaluate and Sell a Vehicle', 'Interview', and 'RV Calculation'.

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

The screenshot shows the 'Job Application' stage in the workflow. The top navigation bar includes 'Workflow', 'Data model', 'Views', and 'Set'. The main area is divided into sections: 'Collect Data' (with options for Personal Information, Work History, Education History, and Resume attachment), 'Personas & Channels' (with '+ PERSONA'), and 'Data & Interfaces' (with '+ DATA'). Under 'Data & Interfaces', there are two items: 'Data object' and 'Attachment'. The 'Attachment' item is highlighted with a red border.

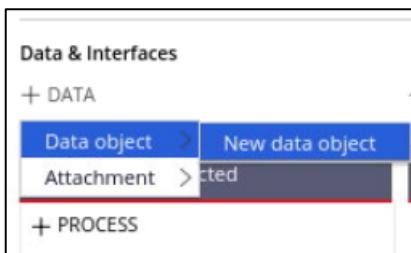
4. Add a new data type/object by clicking **+ DATA**:



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.

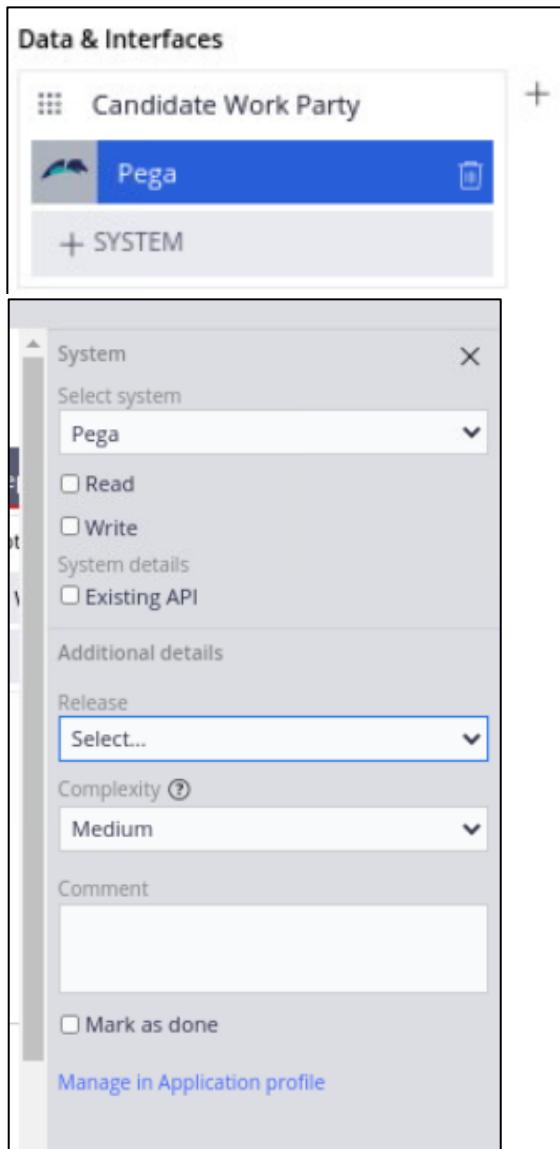
2. Select **Data object > New data object**.



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

A screenshot of a 'New data object' dialog box. At the top left is the title 'New data object' and at the top right is a close button (X). Below the title is a 'Name' label followed by a text input field containing 'Candidate Work Party'. A red circle with the number '1' is placed over the 'Name' field. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Submit' on the right. A red circle with the number '2' is placed over the 'Submit' button.

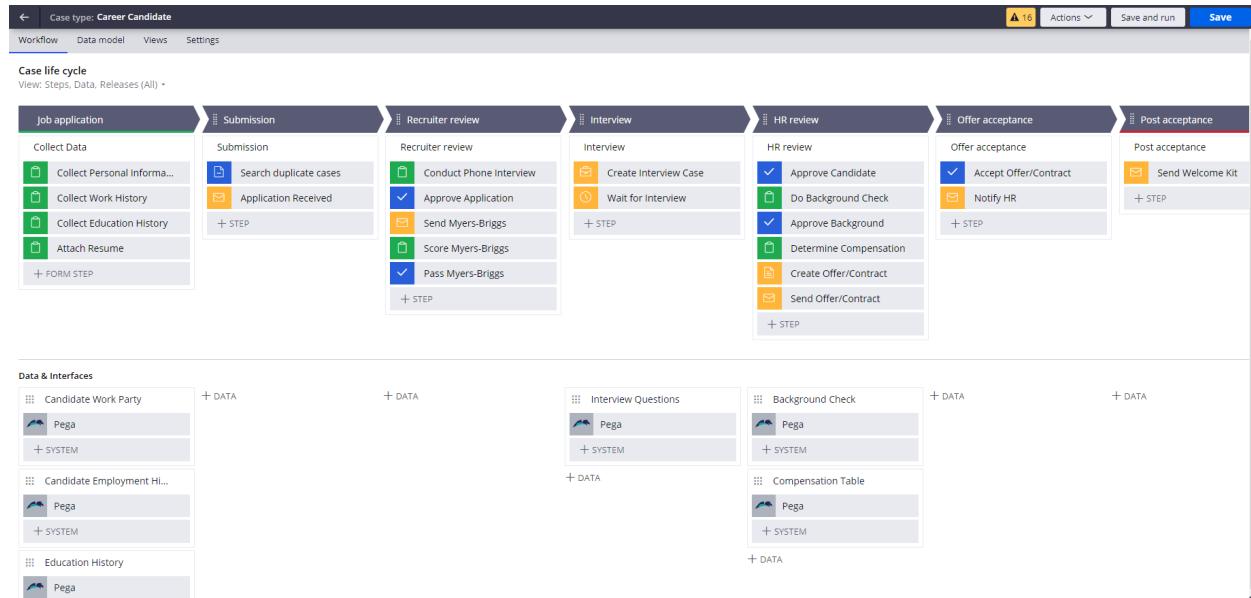
NOTE: When associating a data object to a stage, the system architect or business architect may add additional details in the properties panel to the far right of the workspace as seen below:



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

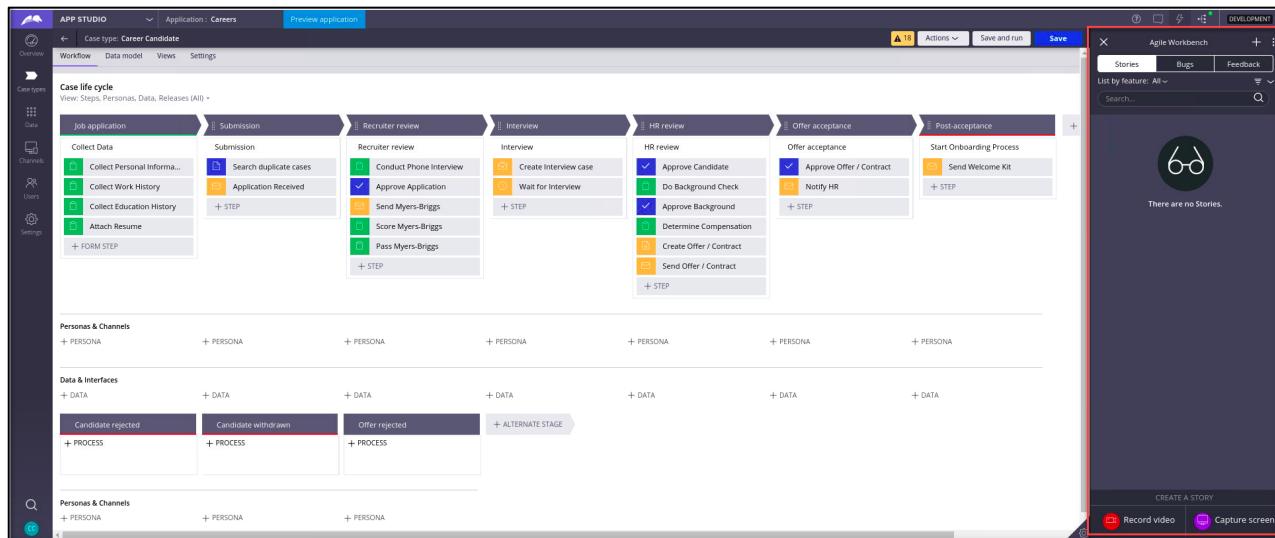
Each step in a stage represents a human or an automated task. As the citizen developer, you have been asked to assist with the collection and documentation of user story requirements for each task in the Job application stage. Adding user stories to features helps to organize them.

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.

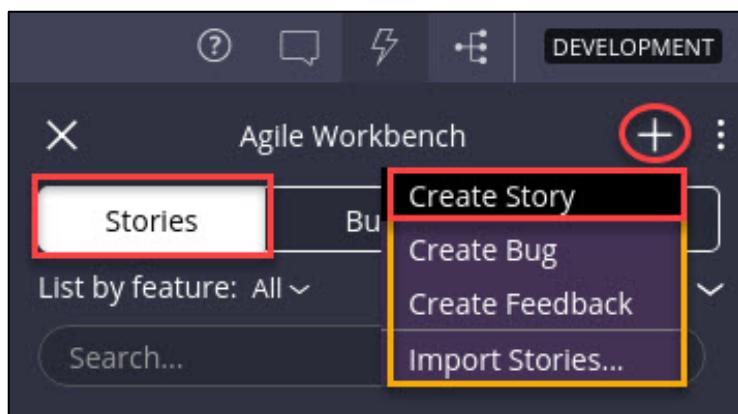
1. In App Studio, click on the **Case types** explorer and select the **Career Candidate** case type.
2. Open **Agile Workbench**. Click the Agile Workbench **lightning bolt** icon in the header (upper-right):



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.

The screenshot shows the 'New Story' form in the properties panel. The form includes fields for Name (set to 'New Story'), Story ID (set to 'US-1'), Description (empty), Associated feature (set to 'None'), Owner (empty), Due date (empty), Complexity (set to 'Select...'), Priority (set to 'Future'), and Attachments (a dashed blue box with a plus sign and 'Add attachment' text). Below the form are sections for Acceptance criteria and Additional details. At the bottom are Pulse controls (Post, CC, Start a conversation) and Save/Cancel buttons.

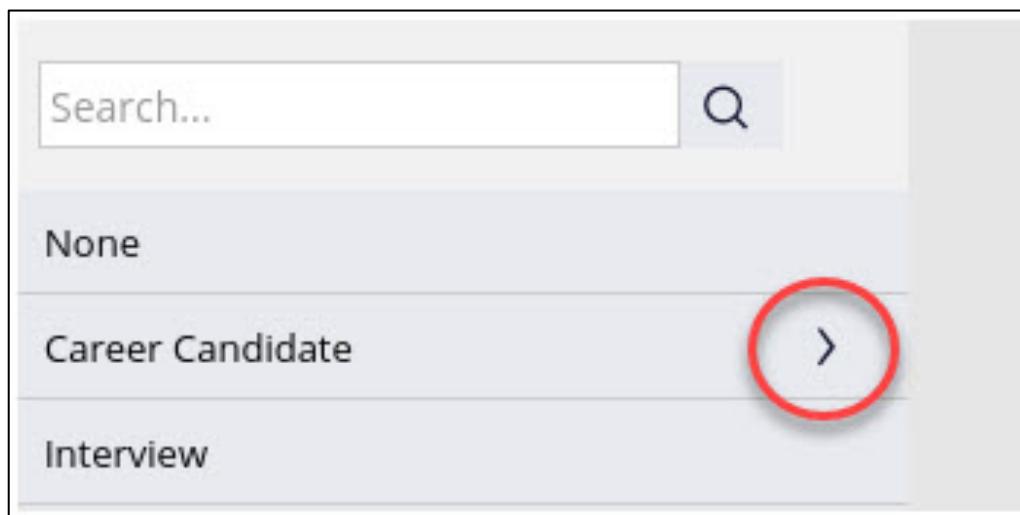
- e. In the **Name** field, enter, **Collect personal information**.
f. In the **Description** field, enter the following information:

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.

A screenshot of a page titled "Job application". On the left, there's a sidebar with links like "Career Candidate", "None", and "Job application" (which is highlighted with a red box). The main content area describes the "Job application" subfeature, stating: "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". Below this, there are sections for "Recruiter review", "Interview", "HR Review", "Candidate accepts offer", and "Post-acceptance steps". At the bottom, it says "Application - Careers:01.01.01" and "Last updated on 7/27/20 1:00 PM by Cyd Citizen". A "Select" button is at the bottom right, also highlighted with a red box.

- 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.

Name
Collect personal information

Story ID US-1

Description
I, the candidate, enter the following information on the Collect personal information form:
First Name (required)
Middle Name (optional)

Associated feature
Job application

Owner Due

Complexity Select... Priority
Must have

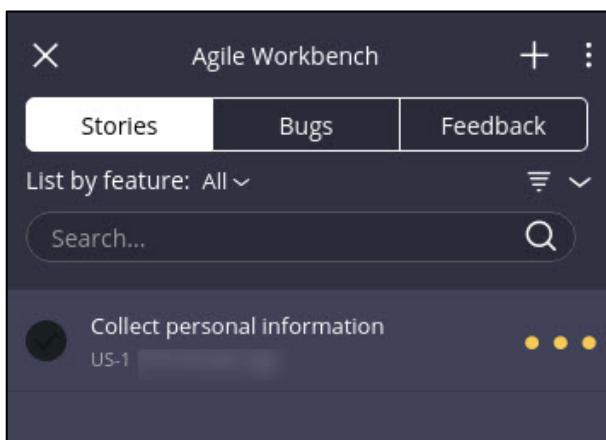
Attachments + Add attachment

> Acceptance criteria
> Additional details

Pulse Post Start a conversation

Cancel Mark as... Save

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”

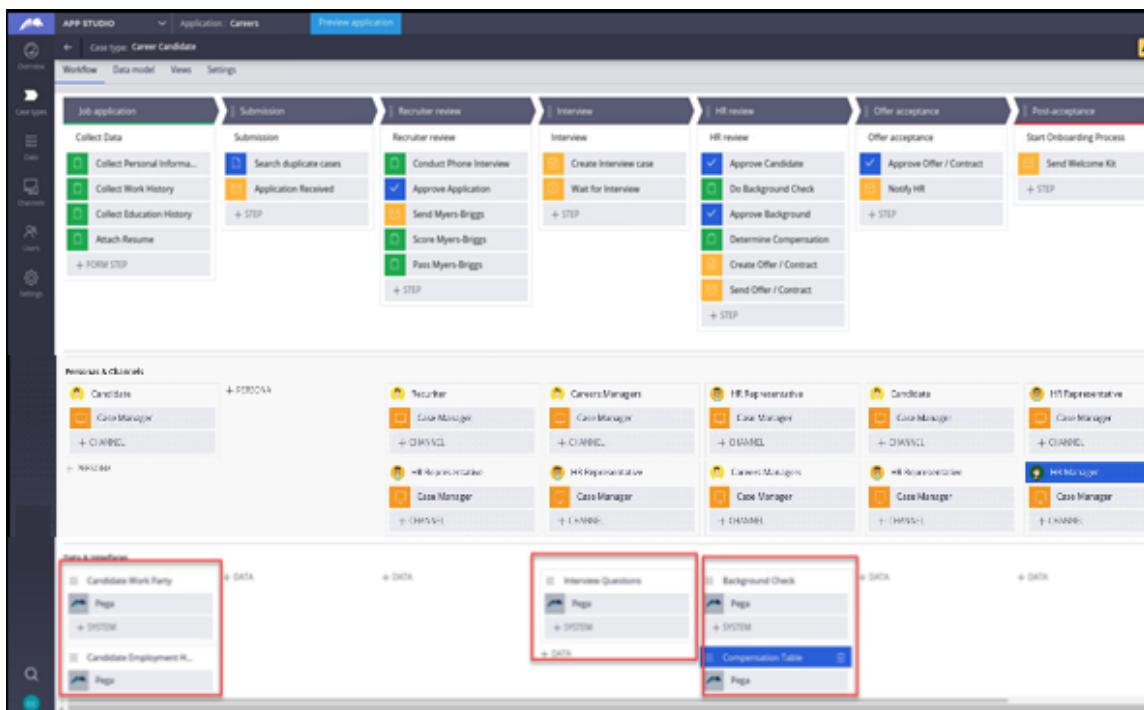
- m. Repeat step 3, sub-steps **a** through **m**, to add five more stories, one for each step in the Job application stage. Use the following table as a guide:

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 • • •

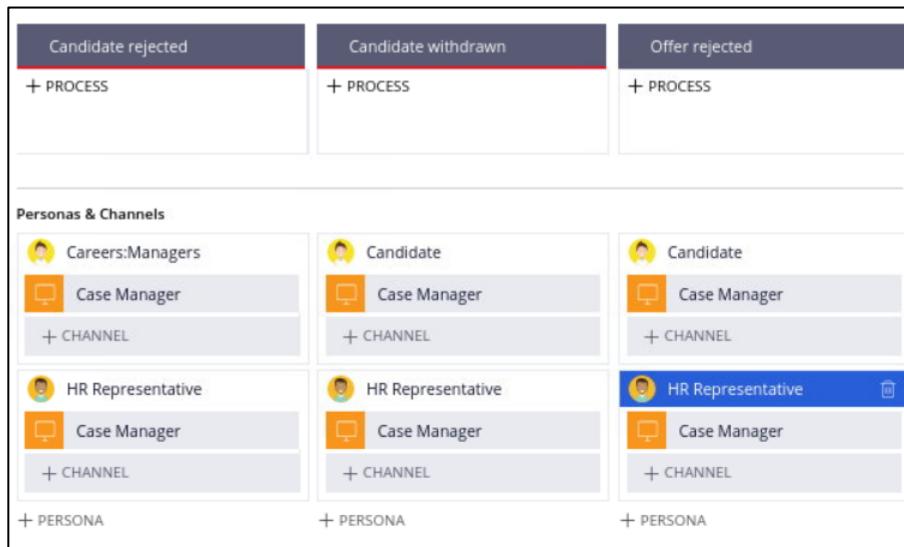
Task 6: Verify your work

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-##).

The screenshot shows the Agile Workbench interface with the following details:

- Header:** Agile Workbench
- Navigation:** Stories (selected), Bugs, Feedback
- Filter:** List by feature: All
- Search:** Search... (with a magnifying glass icon)
- Stories List:**
 - Application received (US-7) | 2 minutes ago
 - Search duplicate cases (US-6) | 5 minutes ago
 - Attach Resume (US-5) | 7 minutes ago
 - Collect education history (US-4) | 9 minutes ago
 - Collect personal information (US-1) | 30 minutes ago
 - Collect work history (US-3) | 54 minutes ago

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**.

The screenshot shows the APP STUDIO Overview screen with the following details:

- Header:** APP STUDIO, Application: Careers, Preview application
- Left Sidebar:** Overview, Case types (Data, Data+, Data+), Data
- Content Area:** Careers (DEVELOPMENT, http://localhost:9080/prweb/app/Careers/). Sub-sections include Version: Pega platform 8.5.2, About, Application documents (Export), and Application profile (Manage, highlighted with a red box).

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

The screenshot shows a feature map interface with two main sections: 'Career Candidate' and 'Interview'. The 'Career Candidate' section has a progress bar at 60% completion and 6 current subfeatures. The 'Interview' section is at 0% completion. Below these are two columns: 'Work items (6)' and 'In progress items appear here.' The 'Work items (6)' column is divided into 'To do', 'Doing', and 'Done' sections. The 'To do' section contains 6 items: 'Collect personal information' (U5-1), 'Collect work history' (U5-3), 'Collect education history' (U5-4), 'Attach Resume' (U5-5), 'Search duplicate cases' (U5-6), and 'Application received' (U5-7). The 'Done' section contains one item: 'Collect personal references' (U5-2), which is marked with a single yellow dot indicating rejection. A note in an orange callout states: 'This story is in the Done column because it was rejected by the product owner. NOTE: This is a sample only. It is NOT a part of your configuration.'

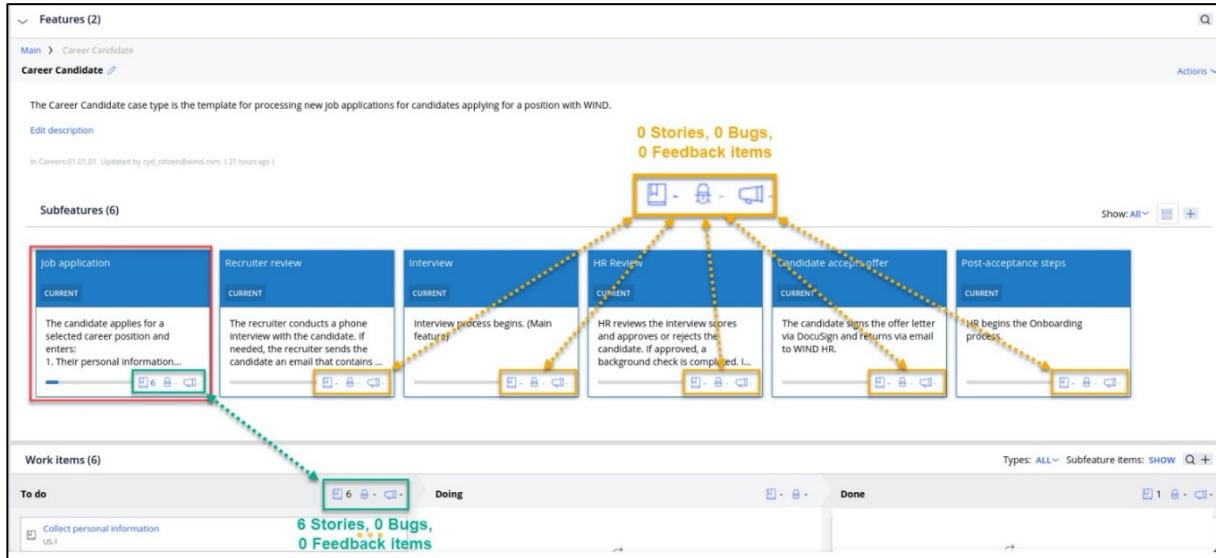
NOTE: The image above displays 6 story work items related to Career Candidate in the To do column. Work items in the To do column are waiting to be assigned to system and business architects for elaboration and construction.

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.

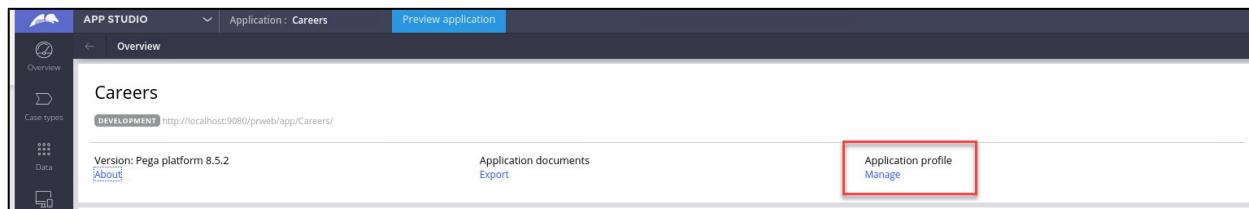
The screenshot shows a large blue tile for the 'Career Candidate' feature. The tile header includes the feature name 'Career Candidate' with a hand cursor icon, 'CURRENT', and '6 CURRENT SUBFEATURES'. Below the header is a descriptive text block: 'The Career Candidate case type is the template for processing new job applications for candidates applying for a position with WIND.' At the bottom of the tile is a progress bar at 60% completion and 6 subfeatures.

- 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).

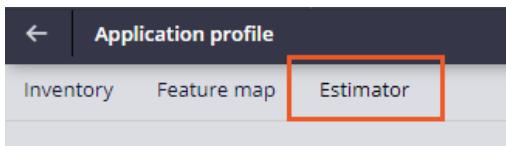


Task 7: Size your project

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



- Click the **Estimator** tab.



- In the **Release** list, select **MLP 2**.
- In the **Delivery** list, select **Scrum/Agile**.
- In the **Number of teams** field, enter **1**.
- In the **Scrum maturity** list, select **Medium**.
- In the **Staffing model** list, select **Co-production**.
- 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.

The screenshot shows the 'Estimator' tab selected in the 'Application profile' interface. On the left, there's a sidebar with 'Attributes' and 'Organization' sections containing dropdown menus for delivery type, number of teams, staffing model, environment, organization complexity, and data import effort. The main area displays the 'Estimated size for MLP 2' which is 42 - 61 Total hours. It includes tables for 'Duration' (Duration in weeks: 1 - 1, Pega or partner hours: 20 - 29, Client hours: 22 - 32) and 'Pega resources' (Project Delivery Leader: 1, Lead / Senior Business Analyst: 1, Lead System Architect: 1, Senior System Architect: 2, UX/UI designer: 0.5). Below this is the 'Level of effort for MLP 2' section, which shows 1 inventory item. It has two tables: 'Items by complexity' (Complex: 0, High: 0, Medium: 1, Low: 0, OOTB: 0) and 'Items by type' (Case types: 1, Personas: 1, Channels: 1, Data objects: 0, Attachments: 0, Features: 0).

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.

Persona	Channel	Case type	Stage	Status	Release	Complexity
Case type : Career Candidate						
Candidate	User Portal	Career Candidate	Job application	TO DO	MLP 2	Medium
Recruiter	Case Manager	Career Candidate	Recruiter review	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Recruiter review	TO DO	MLP 2	Complex
Careers:Manager	Case Manager	Career Candidate	Interview	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Interview	TO DO		Medium
HR Representative	Case Manager	Career Candidate	HR review	TO DO		Medium
Careers:Manager	Case Manager	Career Candidate	HR review	TO DO		Medium
Candidate	User Portal	Career Candidate	Offer acceptance	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Offer acceptance	TO DO	MLP 2	Medium
HR Representative	Case Manager	Career Candidate	Post acceptance	TO DO		Medium
HR Manager	Case Manager	Career Candidate	Post acceptance	TO DO		Medium
Careers:Manager	Case Manager	Career Candidate	Candidate rejected	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Candidate rejected	TO DO		Medium
Candidate	User Portal	Career Candidate	Candidate withdrawn	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Candidate withdrawn	TO DO		Medium
Candidate	User Portal	Career Candidate	Offer rejected	TO DO		Medium
HR Representative	Case Manager	Career Candidate	Offer rejected	TO DO		Medium

Release
Complexity

Select
Medium

Mark as done
Cancel
Submit

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.

Type	Name	Case type	Stage	System	Operations	Existing	Status	Release	Complexity
Case type : Career Candidate									
Data	Candidate ...	Career Ca...	Job applicati...	Pega		No	TO DO	MLP 2	Medium
Data	Candidate ...	Career Ca...	Job applicati...	Pega		No	TO DO		Medium
Data	Education ...	Career Ca...	Job applicati...	Pega		No	TO DO		Medium
Data	Resume	Career Ca...	Job applicati...	Pega		No	TO DO		Medium
Data	Interview ...	Career Ca...	Interview	Pega		No	TO DO	MLP 2	High
Data	Background...	Career Ca...	HR review	Pega		No	TO DO		Medium
Data	Compensa...	Career Ca...	HR review	Pega		No	TO DO		Medium

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).

Feature	Feature map location	Category	Status	Release	Complexity
Category : Case type					
Interview	Interview	Case type	DONE	MLP 1	Medium
Category : General					
Job application	Career Candidate > job application	General	TO DO		Medium
Recruiter review	Career Candidate > Recruiter review	General	TO DO		Medium
Create Interview Case	Career Candidate > Create Interview Case	General	TO DO		Medium
HR review	Career Candidate > HR review	General	TO DO	MLP 2	OOTB
Candidate accepts offer	Career Candidate > Candidate accepts offer	General	TO DO		Medium
Post-acceptance steps	Career Candidate > Post-acceptance steps	General	TO DO	MLP 2	Low

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

Estimated size for MLP 2
450 - 650 Total hours

Duration	Pega resources	Client resources
Duration in weeks	2 - 3	Project Delivery Leader 1
Pega or partner hours	215 - 311	Certified Business Analyst 1
Client hours	235 - 339	Lead / Senior Business Analyst 1
		Certified System Architect 2
		Test lead 1
		Senior System Architect 2
		Tester 2
		UX/UI designer 0.5

Level of effort for MLP 2
5 Inventory Items

Items by complexity	Items by type
Complex	1 Case types
High	1 Personas
Medium	3 Channels
Low	0 Features
OOTB	0 Data objects
	2 Attachments

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

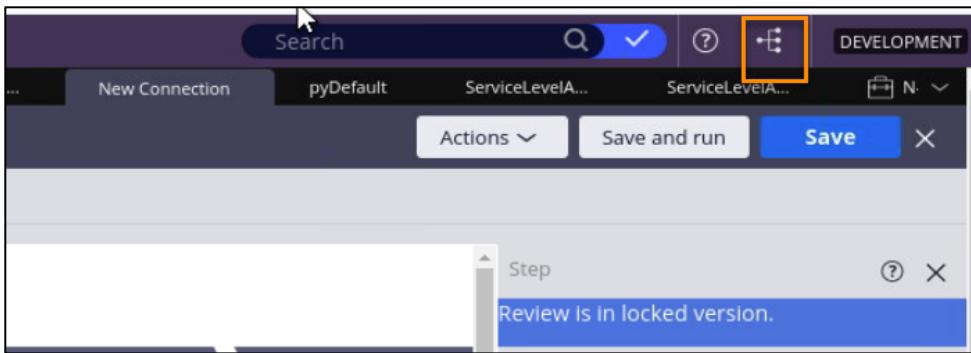
Run the case type and verify the changes

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

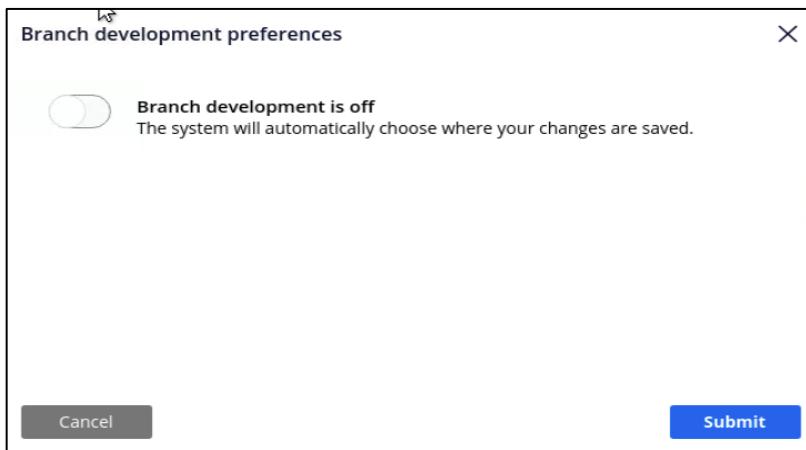
Detailed Steps

Task 1: Login and enable branch development

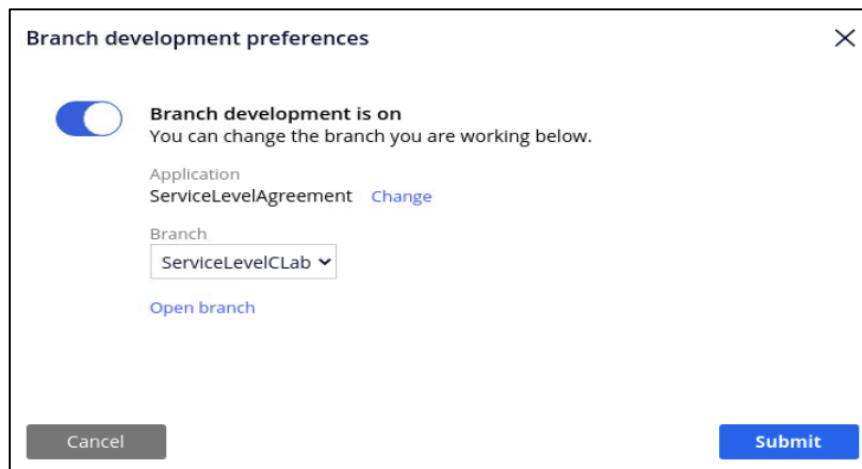
1. Open the exercise system.
2. Log in using the credentials **author@slac** and **rules**.
3. From the title bar click the **Toggle branch development** button.



The following appears:



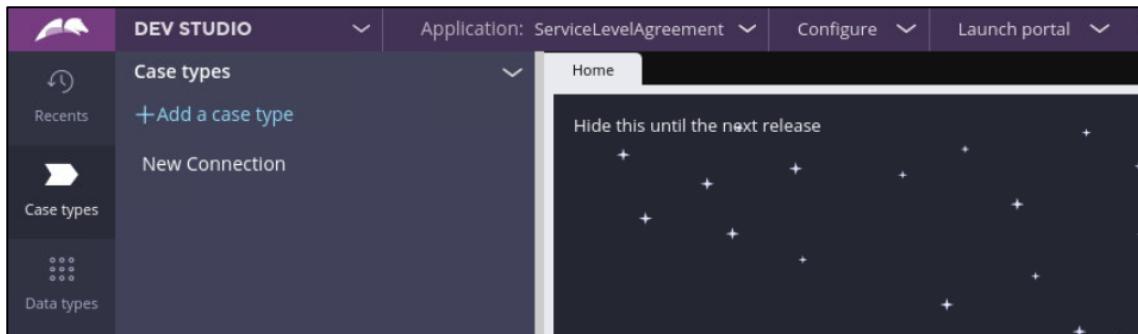
4. Move the slider to turn branch development on.
5. From the **Branch** dropdown ensure that **ServiceLevelCLab** is selected and click **Submit**.



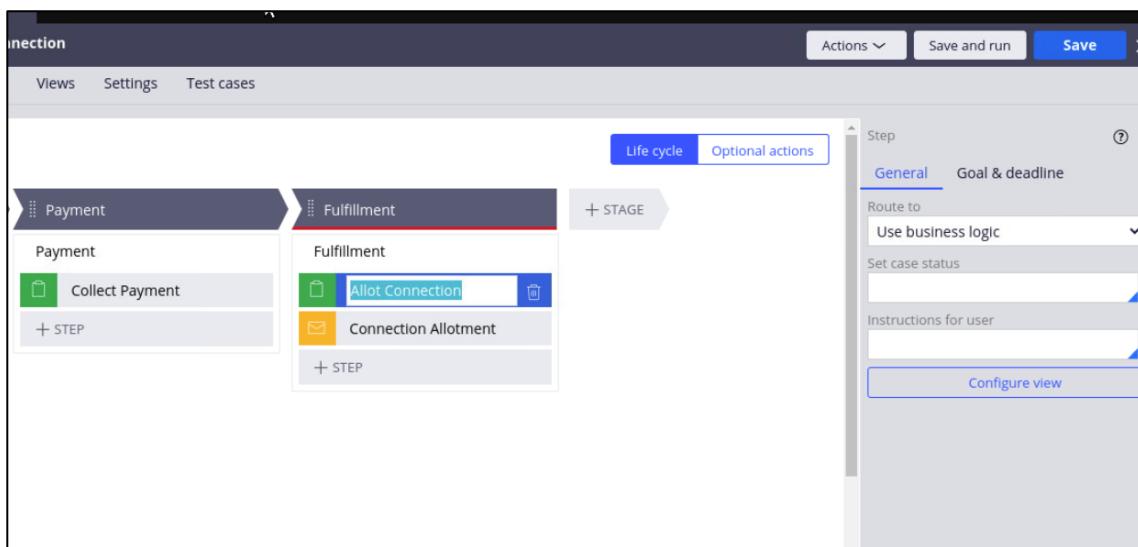
Task 2: Configure a goal and deadline for an assignment step

Attach and configure a SLA for an assignment step.

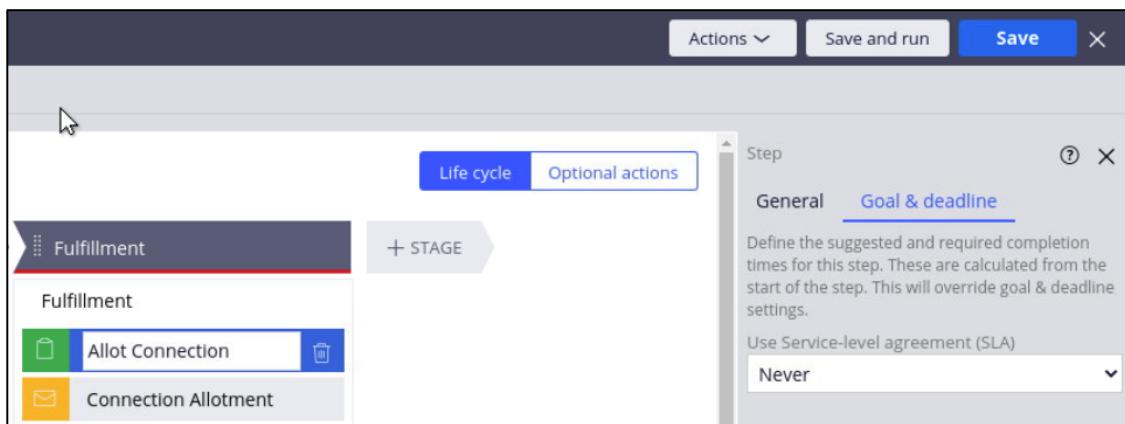
1. Select **Case Types > New Connection**.



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

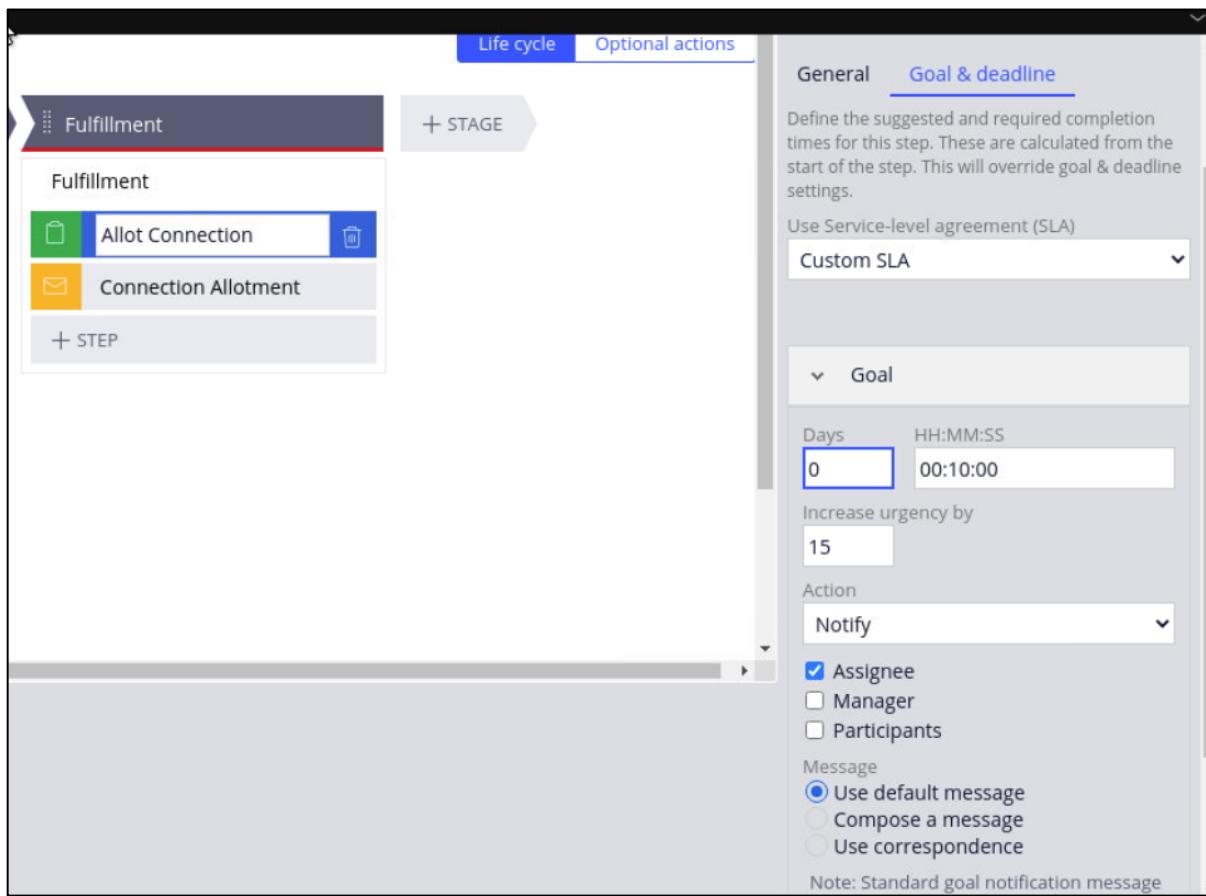


3. In the right context menu select the **Goal & deadline** tab.

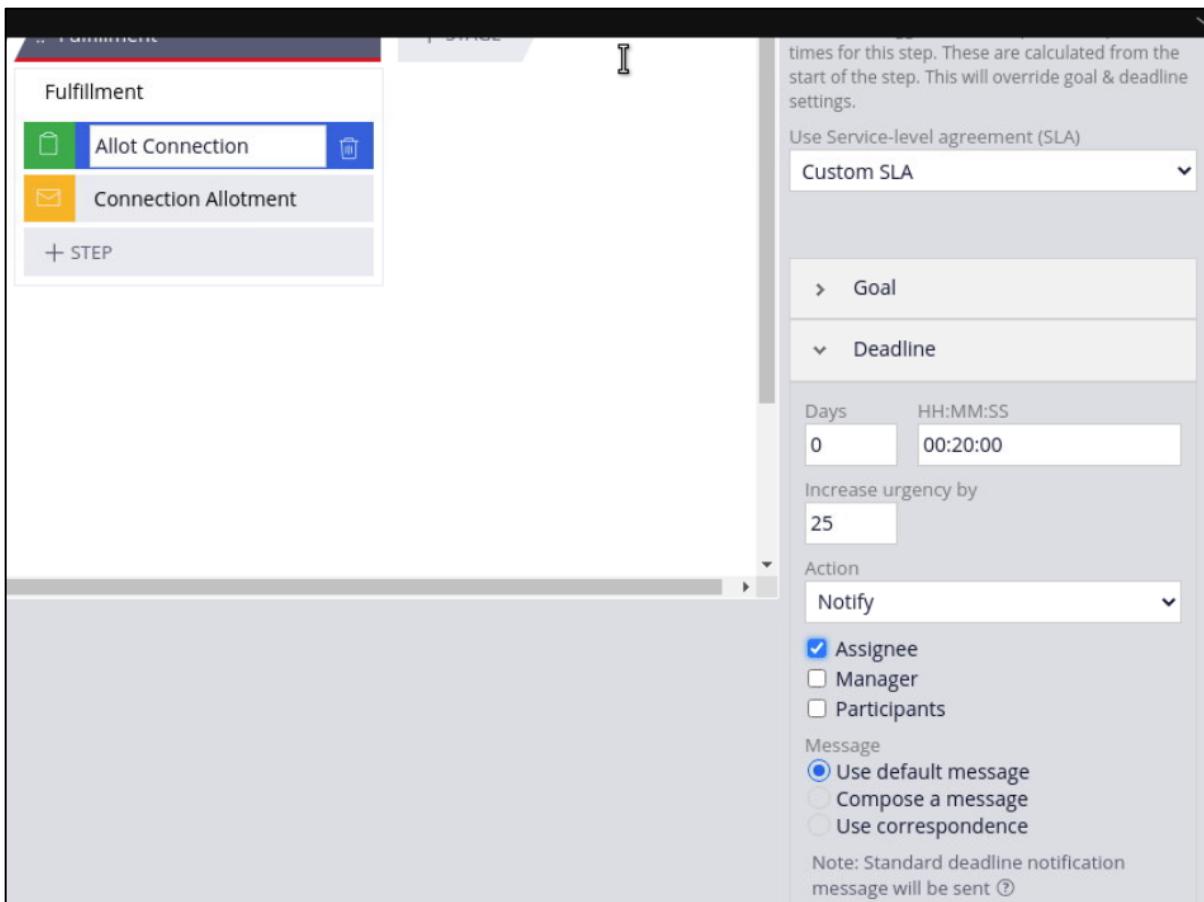


4. From the **Use Service-level agreement (SLA)** drop-down, select **Custom SLA** to display the SLA configuration settings.
5. Under **Goal**, in the **Days** field, enter **0**.
6. In the **HH:MM:SS** field, enter **00:10:00**.
7. In the **Increase urgency by** field, enter **15**.

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



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

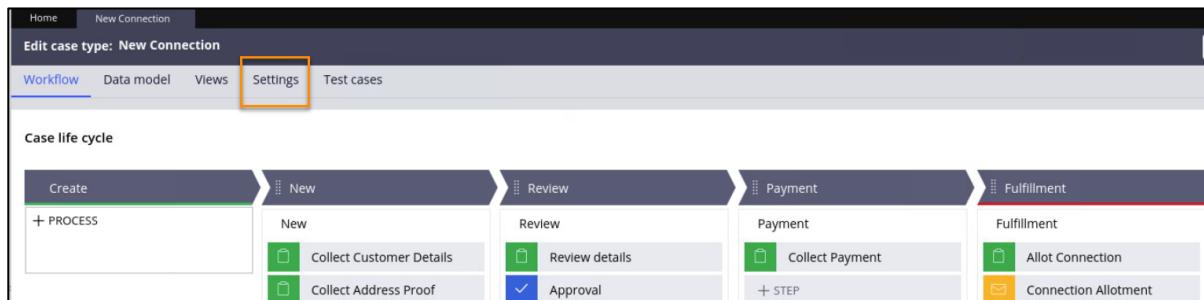


14. Click **Save** to save the configuration of the service level agreement.

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**.

Goal & deadline
Define the suggested and required resolution times for a case.

Use Service-level agreement (SLA)

Calculate time from the start of
 This case Parent case Top level case

Goal

Days	HH:MM:SS	Increase urgency by
0	00:30:00	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.

N-2
New Connection

Priority 20

Status NEW
Created author about a minute ago
Updated author less than a minute ago

Details

Pulse

Create New Review Payment Fulfilment

Collect Plan Details
Due 39 minutes from now •

Collect Customer Details Collect Address Proof Collect Plan Details

Choose your Plan *

Select...
Select...
Pre Paid
Post Paid
Wifi

Address Proof --

Choose your Plan --
Selected Plan --
Amount to be Paid --
Payment Mode --
Phone number --

Save Finish

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

N-2
New Connection

Priority 20

Status NEW
Created author about a minute ago
Updated author less than a minute ago

Details

Pulse

Create New Review Payment Fulfilment

Collect Plan Details
Due 39 minutes from now •

Collect Customer Details Collect Address Proof Collect Plan Details

Choose your Plan *

Wifi

Wifi Plans

	Data Usage	Plan Name	Tariff	Validity	
1	2GB	Plan 299	\$299.00	28 Days	Apply
2	1.5GB	Plan 499	\$499.00	58 Days	Apply
3	2GB	Plan 699	\$699.00	84 Days	Apply

Back Save Finish

Is Current Address same as Permanent Address? True
Address Proof --

6. Click **Finish**.

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

The screenshot shows the 'New Connection' page with a priority of 20. A red box highlights the 'Priority 20' field. The right panel displays a 'To do' list with a 'Review details' item.

New Connection

Priority 20

Status NEW

Created author 16 minutes ago

Updated author 13 minutes ago

Details

Pulse

To do

W Review details
Review (Review)

Is Current Address same as True Permanent Address?

Address Proof --

Choose your Plan Wifi
Selected Plan Plan 299
Amount to be Paid \$299.00
Payment Mode --
Phone number --

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

The screenshot shows the 'New Connection' page with the 'Actions' dropdown open, highlighting the 'Change stage' option. The right panel displays a 'To do' list with a 'Review details' item.

New Connection

Priority 20

Status NEW

Created author 16 minutes ago

Updated author 13 minutes ago

Details

Pulse

Actions

Change stage

To do

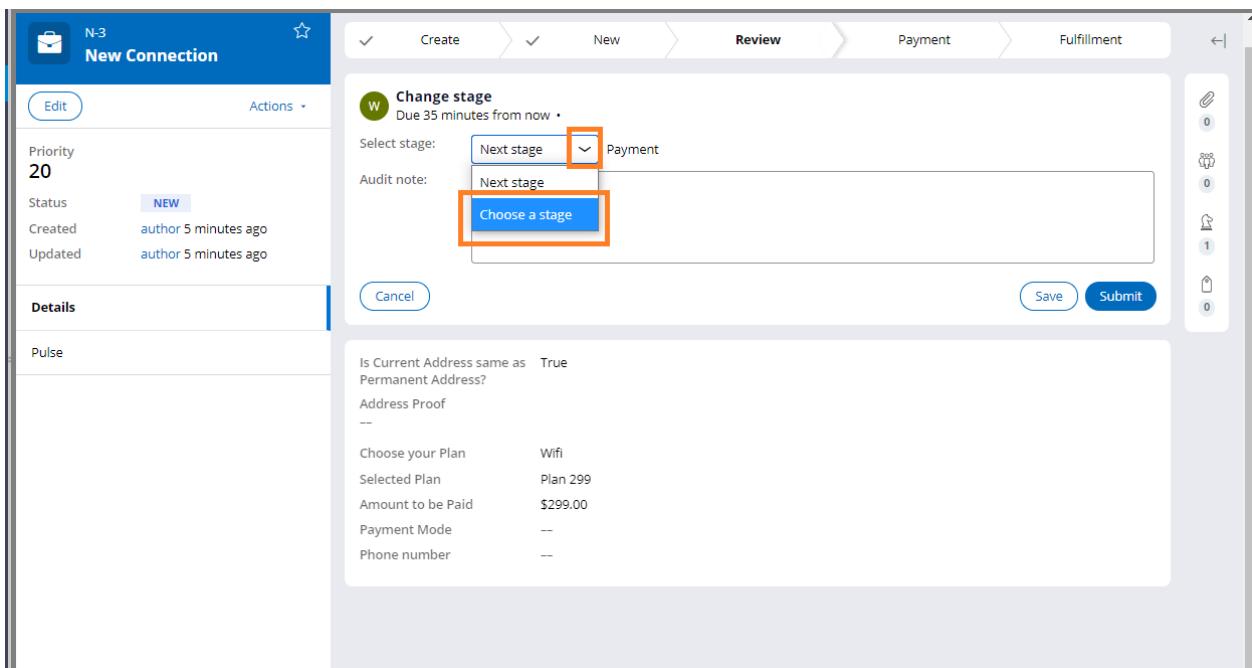
W Review details
Review (Review)

Is Current Address same as True Permanent Address?

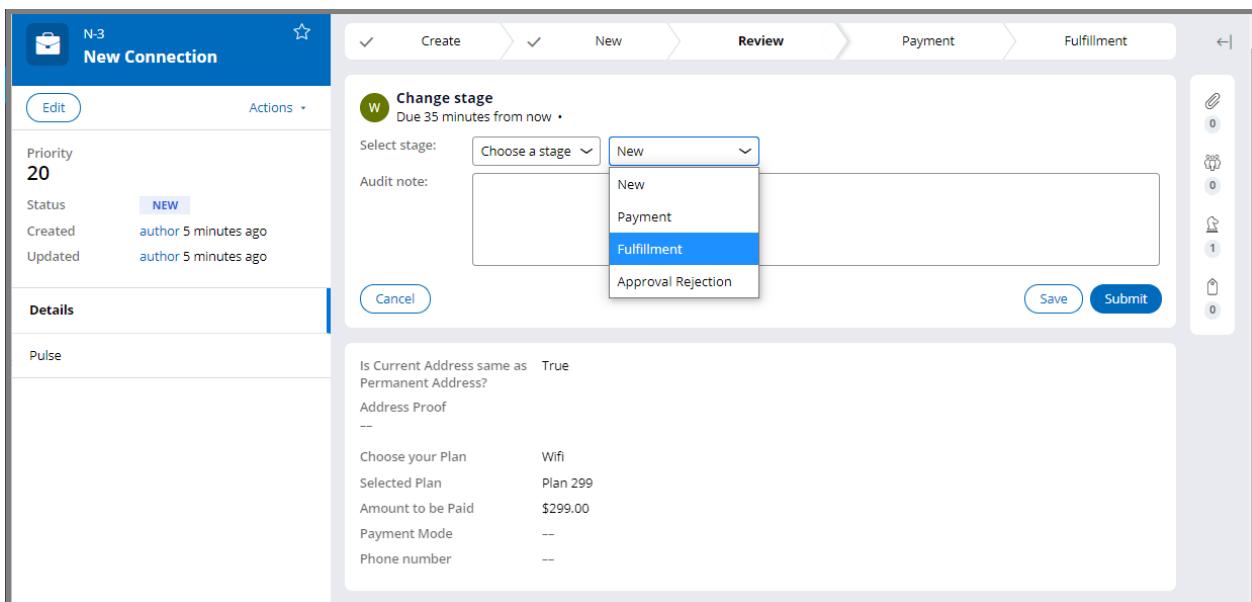
Address Proof --

Choose your Plan Wifi
Selected Plan Plan 299
Amount to be Paid \$299.00
Payment Mode --
Phone number --

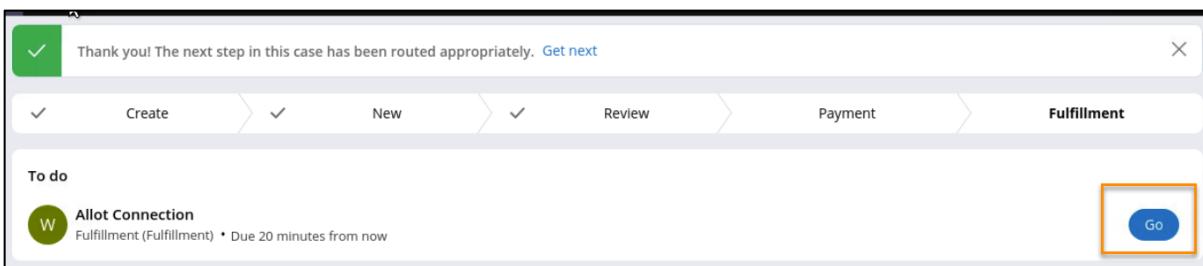
9. From the Select stage drop down, select **Choose a stage**.



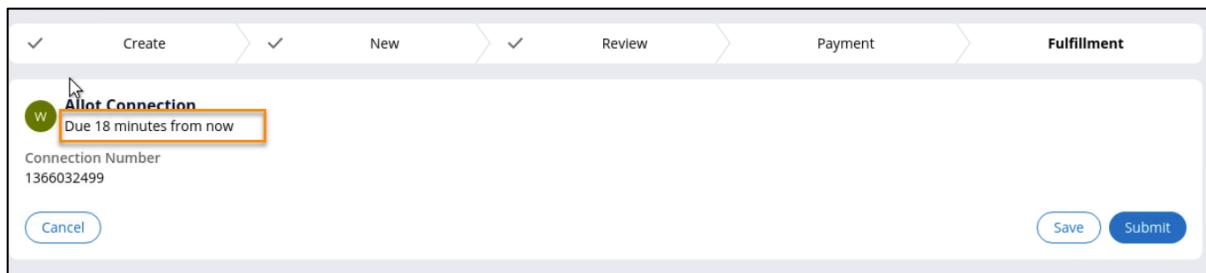
10. Select **Fulfillment** and click **Submit**.



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.

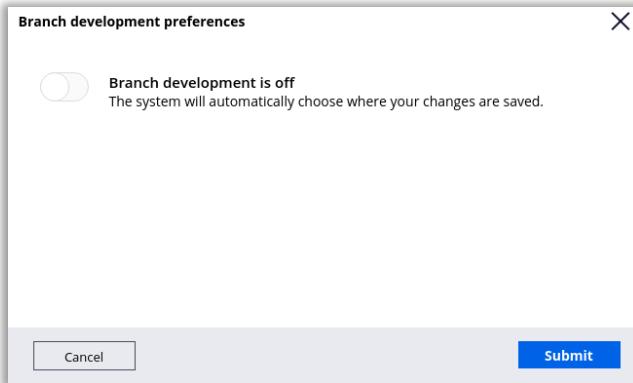
Detailed Steps

Task 1: Log in and enable branch development

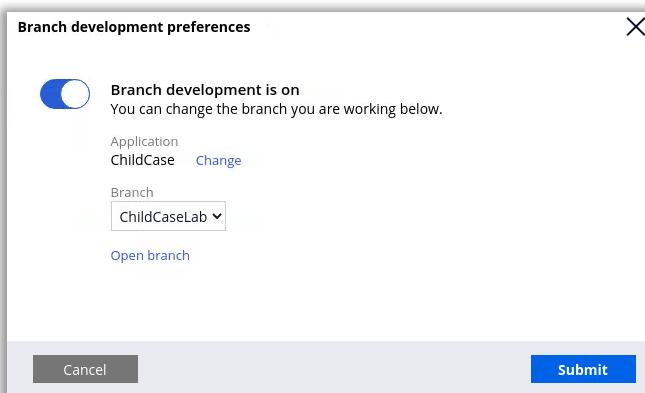
1. Log in and use the credentials **admin@childcase** and **rules**.
2. From the title bar click the **Toggle branch development** button.



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**.

The screenshot shows the Pega studio interface with the 'Create case' step selected in the 'Automations' list. The details pane on the right shows the step's description: 'Creates one or more cases from the current case' and its last update date: 'Last updated on 10/28/18 9:47 AM by Pega'. A 'Select' button is visible.

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

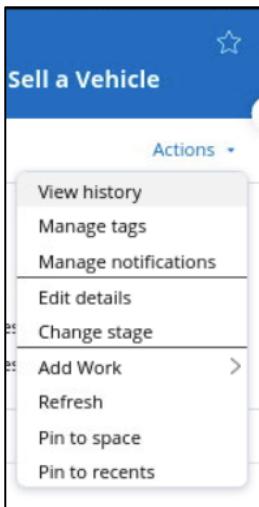
The screenshot shows the 'ExpertVisit' process steps. Step 3, 'Calculate Residual Value', is highlighted with a blue background and a blue border. Other steps include '1. Inspect Vehicle' and '2. Upload Certificates'.

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

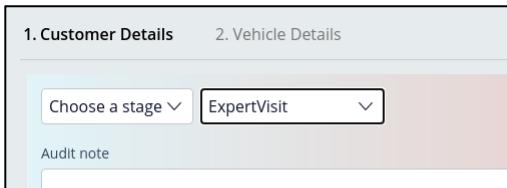
The screenshot shows the 'Step' configuration dialog for the 'Calculate Residual Value' step. The 'Step' tab is selected. The 'Create case' radio button is selected. The 'Create the following case' dropdown is set to 'RV Calculation'. The 'Starting process' dropdown is also set to 'RV Calculation'. The 'Data transform' field contains 'CreateCase'. The 'Audit note' and 'Enable navigation link' fields are empty.

Task 3: Verify Work

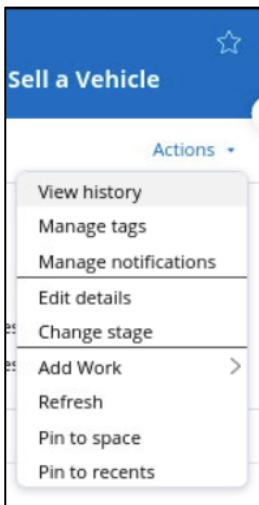
- Click **Save and Run** to run an instance of the case.
- From the **Actions** menu select **Change Stage**.

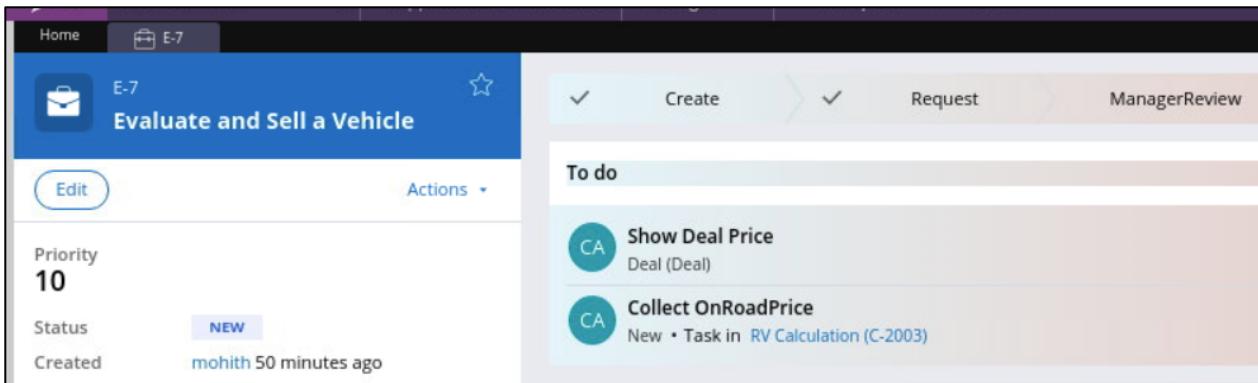


3. Select **Choose a stage**. Choose **ExpertVisit**. Click **Submit**.



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.

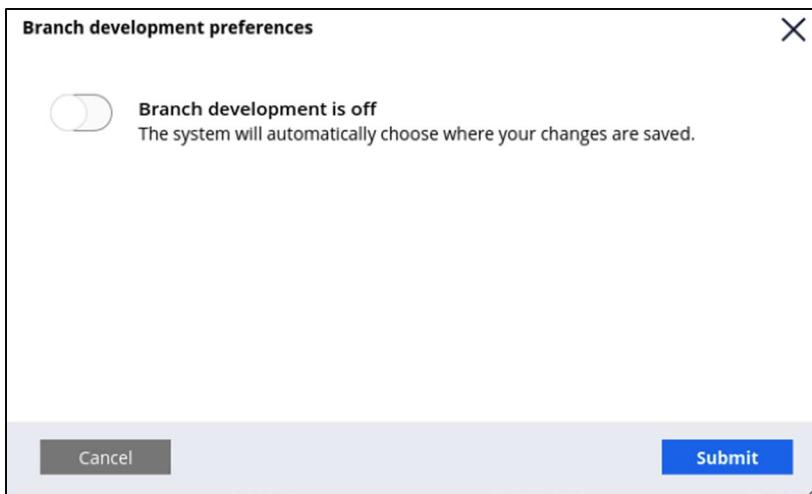
Detailed Steps

Task 1: Login and enable branch development

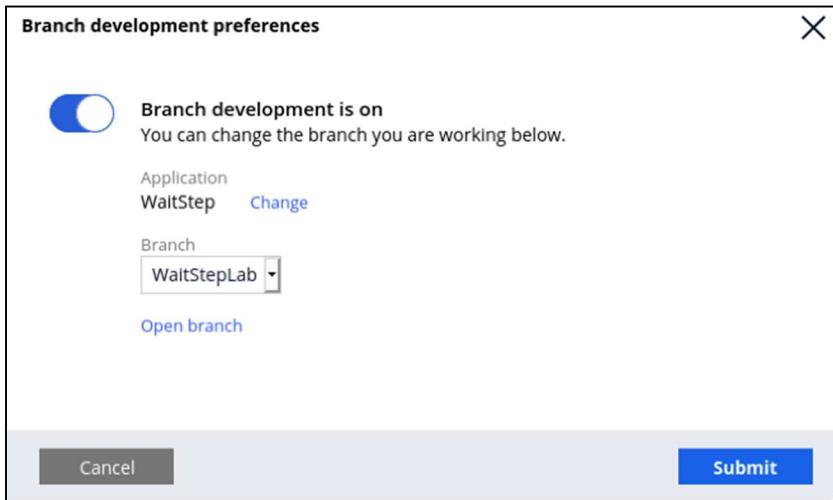
1. Log in using the credentials **author@ws** and **rules**.
2. From the title bar click the **Toggle branch development** button.



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**.

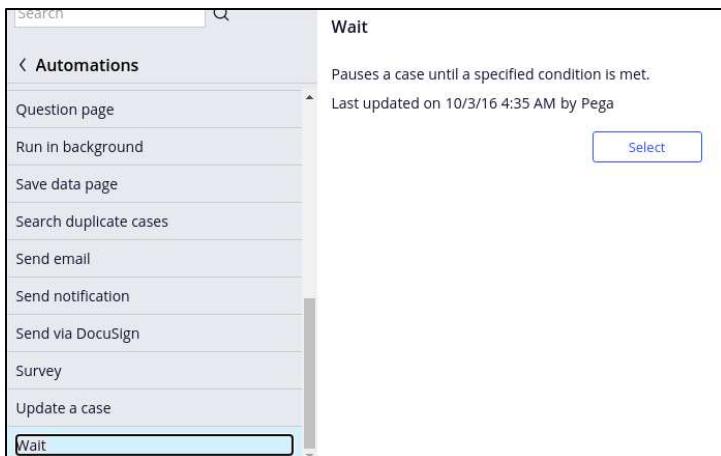


Task 2: Add Wait Step

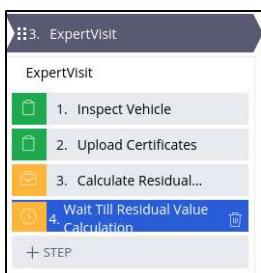
1. Open Dev Studio.
2. Select **Case Types > Evaluate and Sell a Vehicle**
3. In the **ExpertVisit** process add a step.



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



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



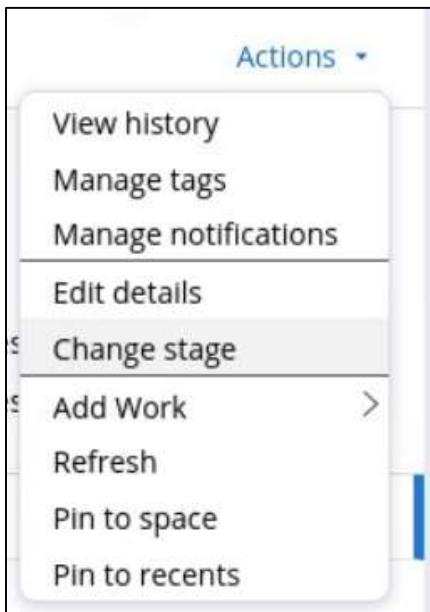
6. In the context menu change the **Wait for (case type)** drop down to **RV Calculation**. Select the **To be resolved** radio button.

A screenshot of the 'Step' configuration dialog for a 'Wait' step. The 'Wait type' is set to 'Case Dependency'. The 'Wait for (Case type)' dropdown is set to 'Any' and 'RV Calculation'. The 'To be resolved' radio button is selected. Other options like 'To reach status' and 'Consider status after wait begins' are also present. The 'Scope' is set to 'Current case' and the 'Users can choose to continue process' checkbox is checked.

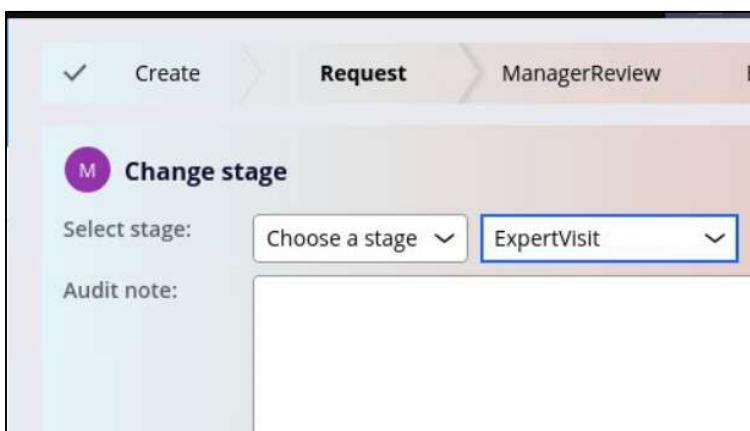
7. Click **Save**.

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 Calculation* 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

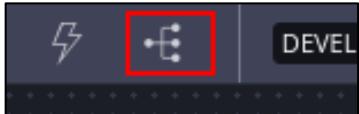
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

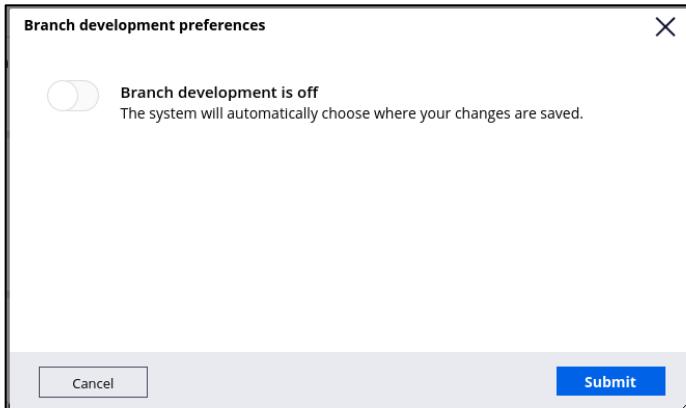
Note: All development needs to be done on Branch

Task 1: Login and enable branch development

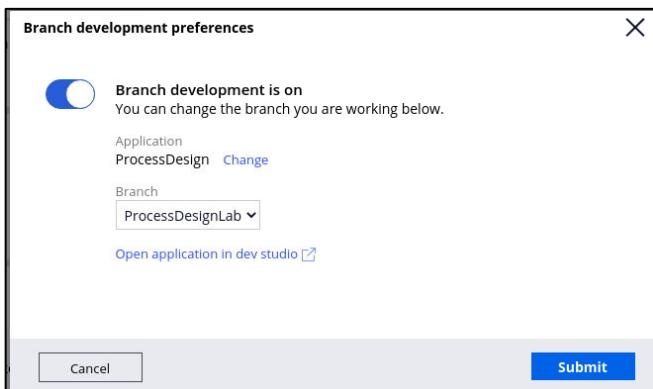
1. Log into Pega using the username **Author@ProcessDesign** and password of **rules**.
2. From the title bar, click the **Toggle branch development** button.



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**.

APP STUDIO Application : ProcessDesign

Case types

Search case types... 2 case types

Evaluate and Sell a Vehicle

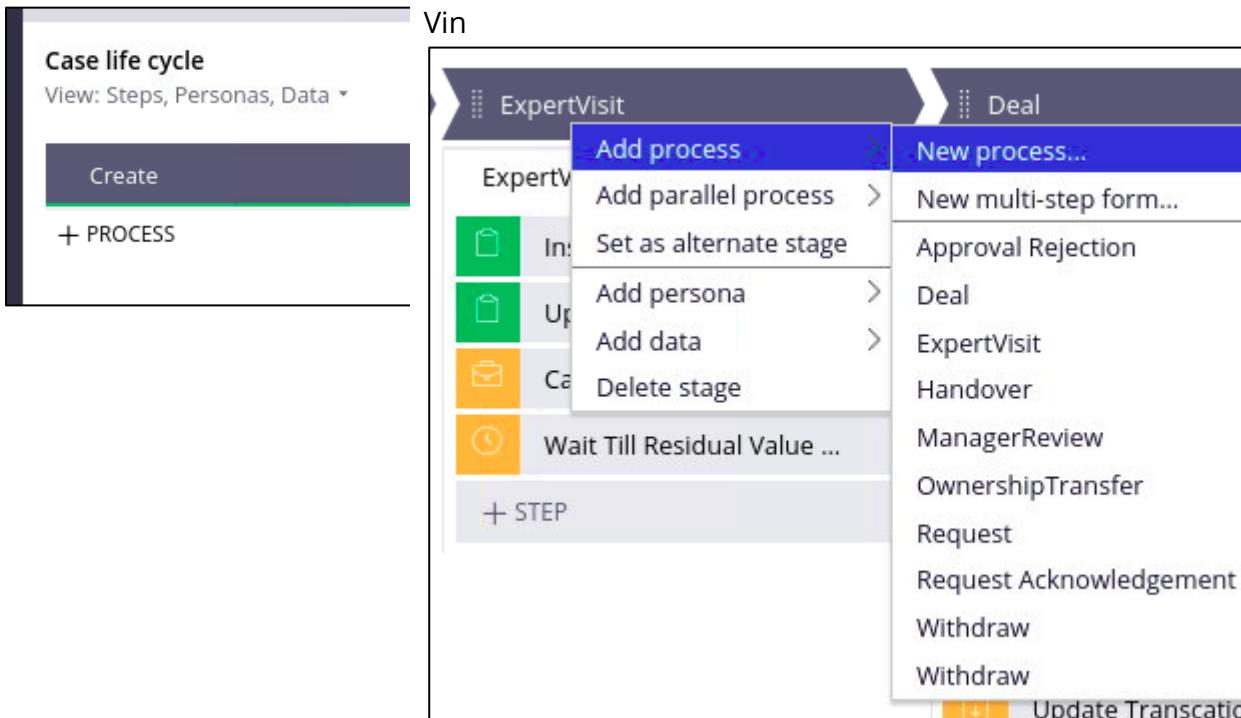
RV Calculation

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

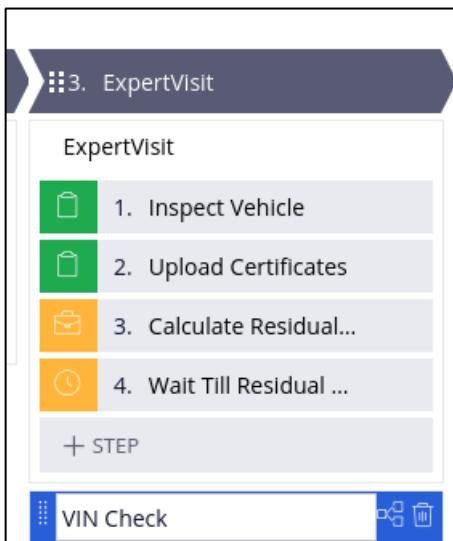
Note: Many of the actions you can take on a stage, process, or step are not visible until you hover your mouse over that part of the screen. For example, you will not see the stacked 3 dots until you bring your mouse over the Expert Visit stage chevron.



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



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

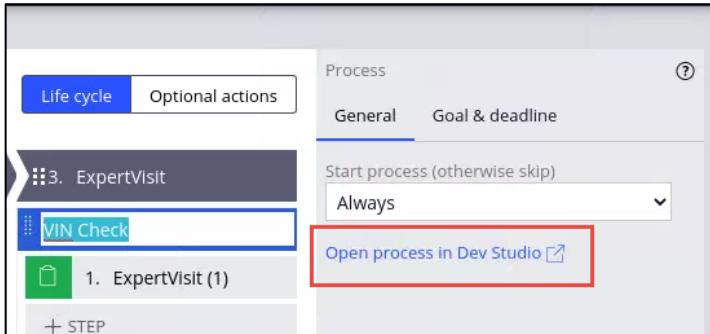


4. Click on the dots next to **VIN Check** and change the order of the processes by dragging. So **VIN Check** starts first.
 - a. When you hover over the Process bar you will see the handle appear.

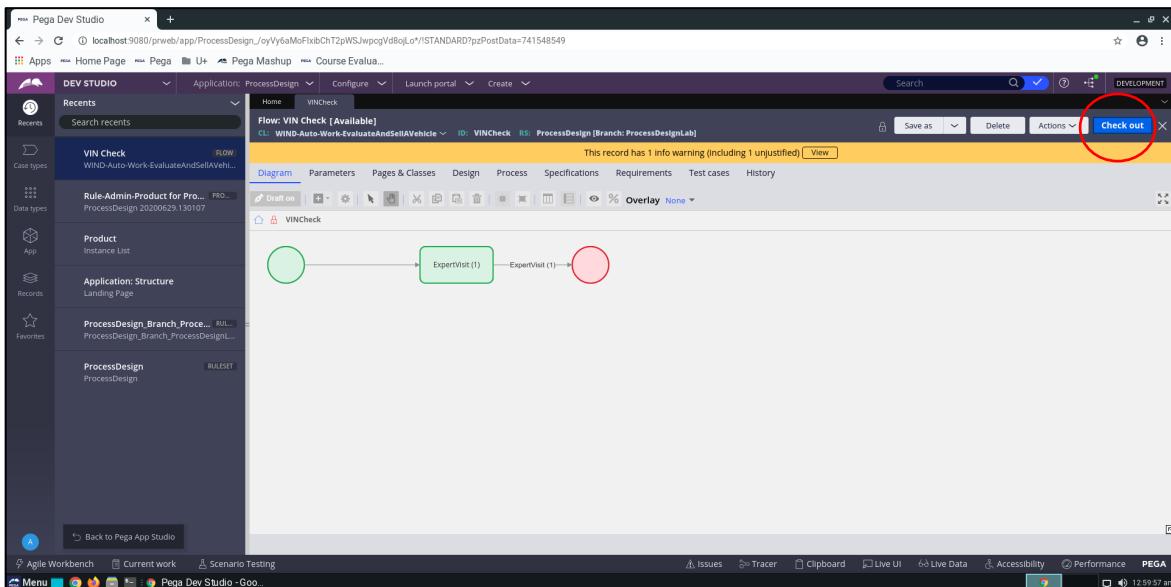


b. When you select the bar a white directional cross of the arrow appears. Hold and drag the **VIN Check** bar over the **ExpertVisit** process bar. You will then see the **ExpertVisit** slide down beneath **VIN Check** as shown in the following screenshot.

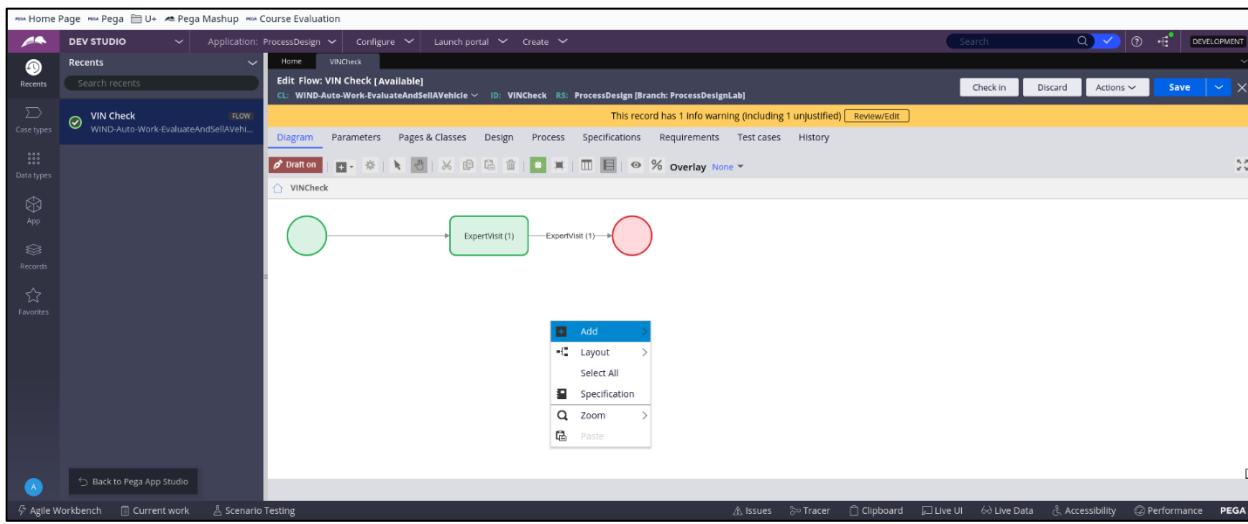
5. Click the **Save** button.
6. We have the flexibility of modeling the process using the process modeler for basic features or we can modify the process in the Flow rule in Dev Studio for advanced capabilities. **Click** the link for **Open Process in Dev Studio**.



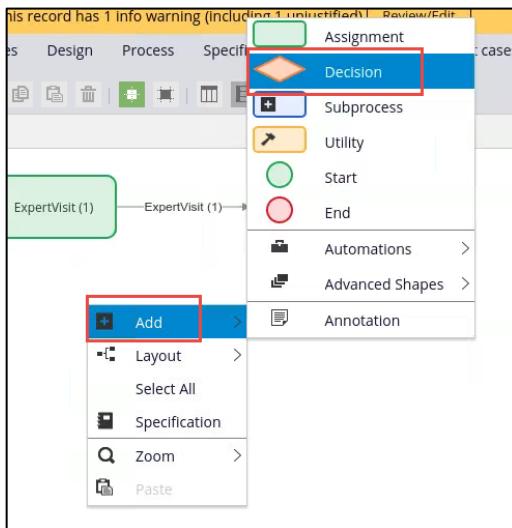
7. The flow rule appears. Click the **Checkout** button.



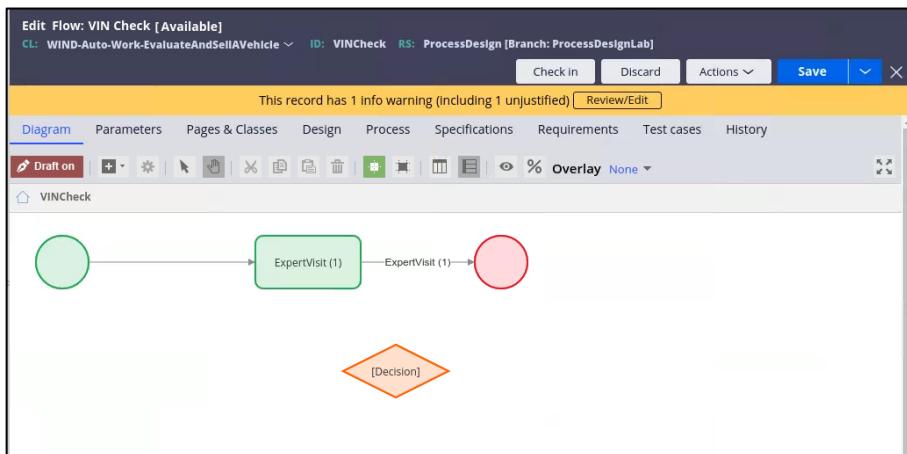
8. Add a **Decision Shape** to the flow.
 - a. Right-click in the center of the pallet to activate the menu.



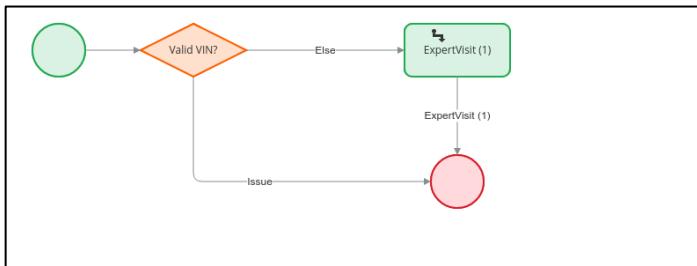
b. Navigate the menu to the Decision shape and select it.



c. The flow will look like the following:

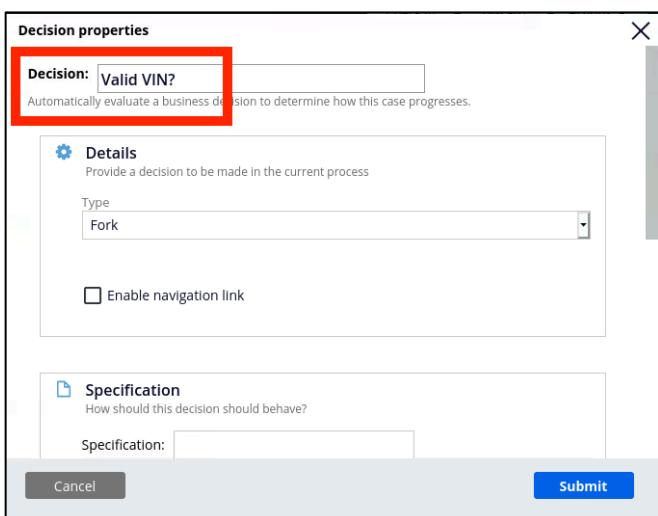


- d. Follow the steps e through i below to configure the flow. After configuring the flow, the final flow should look like the image below:



- e. Double Click on Decision and change the name to “Valid VIN?” .

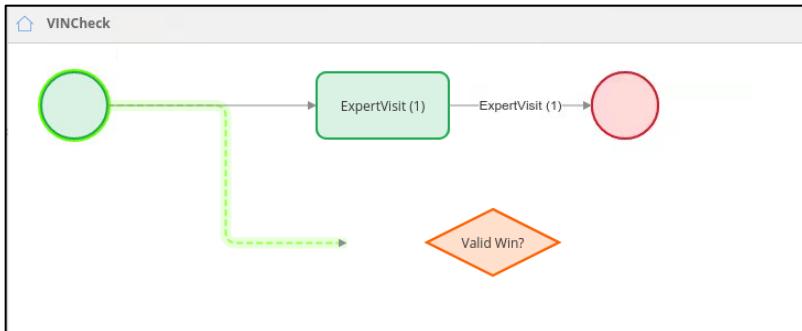
Click Submit.



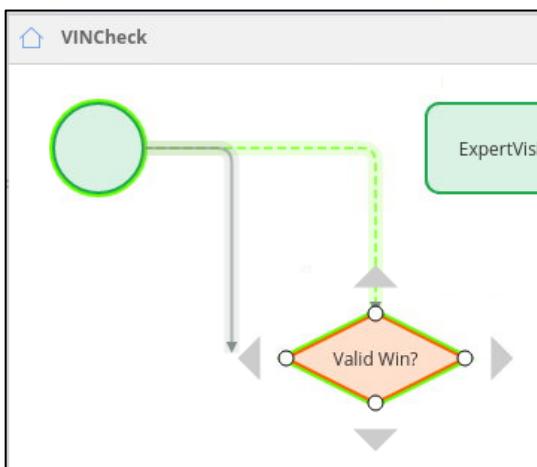
- f. Click on the connector coming out of the **Start** shape to activate the connector's endpoints.



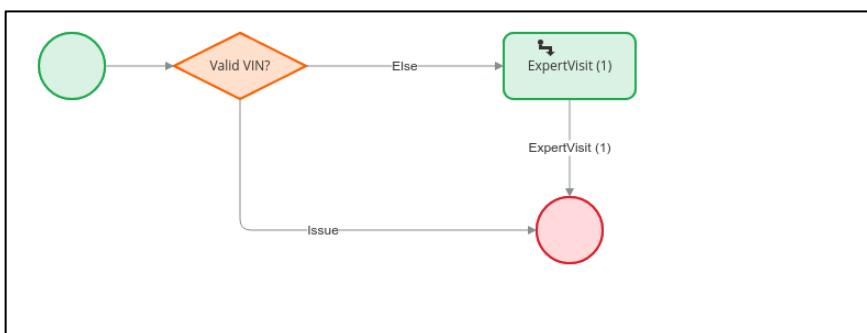
- g. We want to reuse this connector. The white circles are handles. Use your mouse to grab the handle and drag it to the center of the decision shape. Notice as you pull the connector the **Start** shape and **connector** begin to glow green.



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

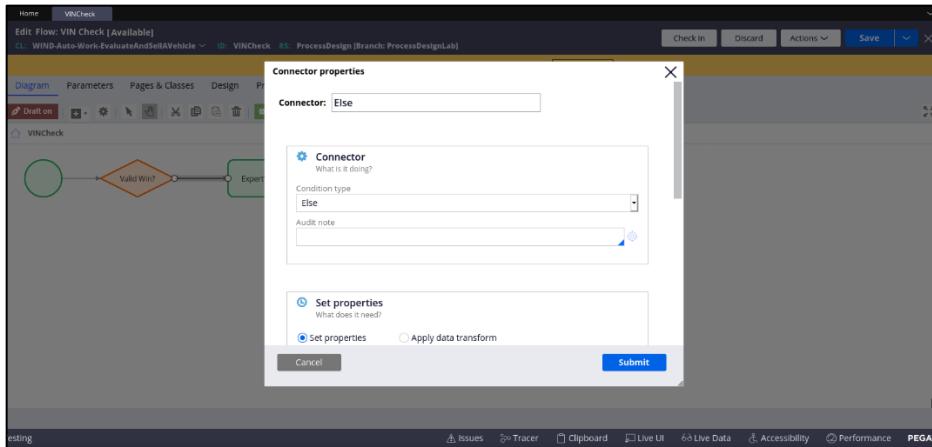


- i. Repeat the connector instructions until you have arranged your flow to look like the following.



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.

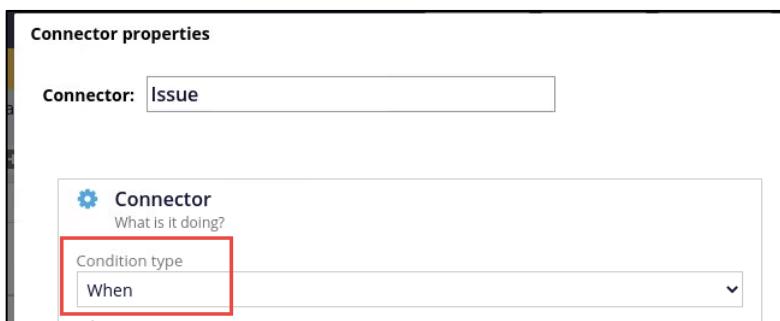
9. Double click on the connector going from the Decision shape to the ExpertVisit(1) assignment shape and type the name in the Connector: **Else**.
10. Choose the Condition Type as **Else**. Click **Submit**.



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

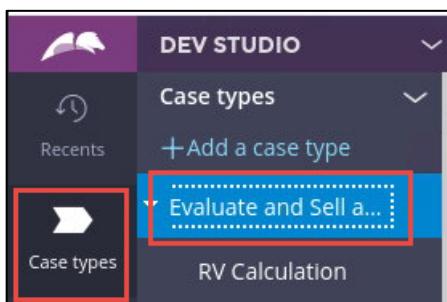
12. Change the **Condition Type** to **When** and Click **Submit**.

Note: The flow should be in Draft on mode.

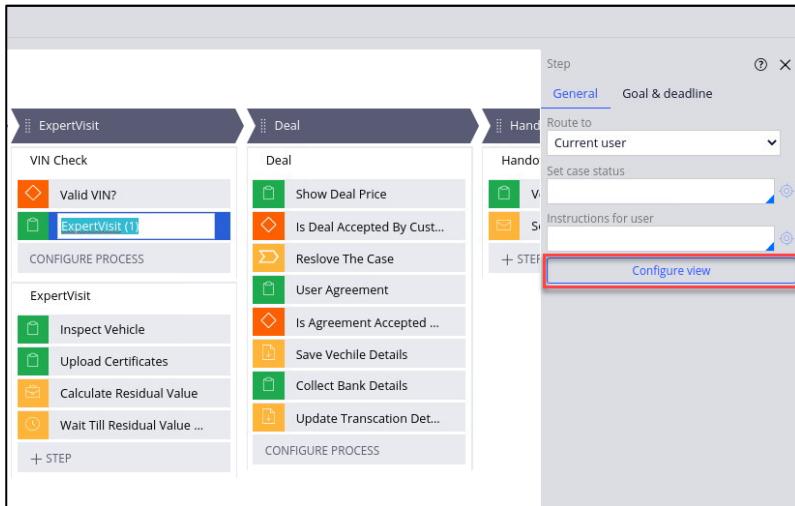


13. Click **Save**.

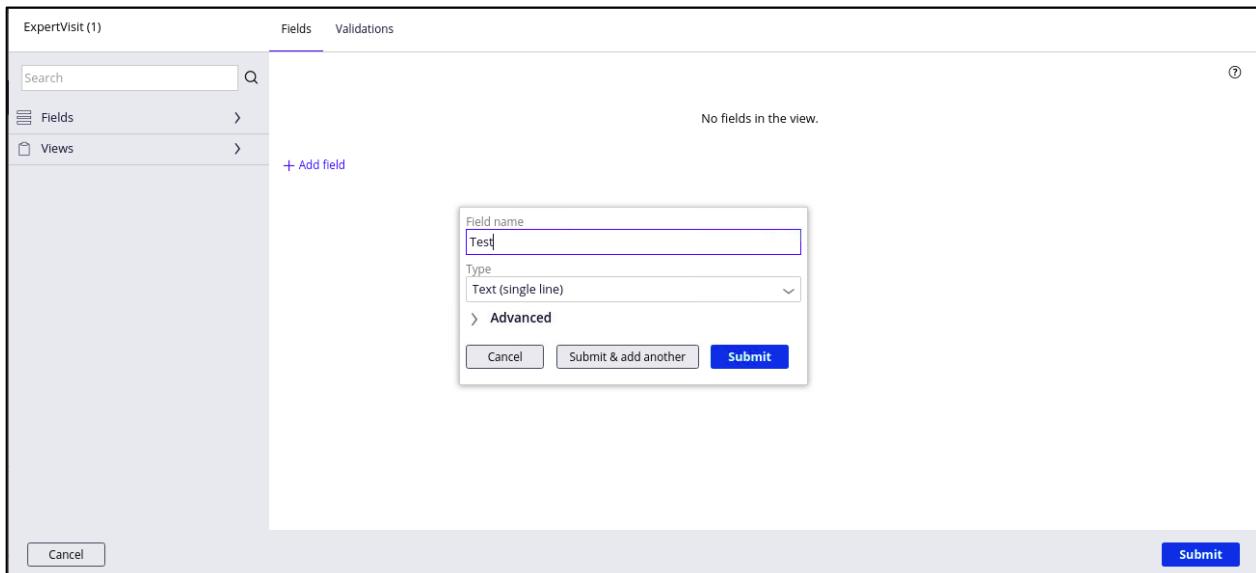
14. Open the Case type again by clicking on **Case Types > Evaluate and Sell A Vehicle**.



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



- 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

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



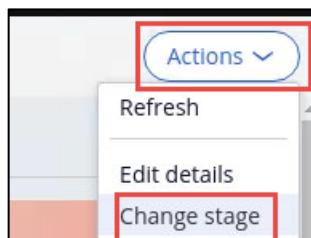
- A new case will start in a new tab in Dev Studio.

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.

The screenshot shows a web-based application interface for vehicle evaluation. At the top, there's a navigation bar with links like 'Home', 'Evaluate and ...', 'VINCheck', and 'E-2002'. Below the navigation is a header for 'Evaluate and Sell a Vehicle (E-2002)'. The main content area has two tabs: '1. Customer Details' and '2. Vehicle Details'. Under 'Customer Details', there's a form with fields for 'Address' (with three address line inputs) and 'City'. To the left of the form, there's a sidebar with 'Customer Details' and other sections. At the top right of the main content area, there's an 'Actions' button with a dropdown menu.

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**.

This screenshot shows a 'Change stage' dialog box overlaid on the main application. The dialog has a title 'A Change stage'. It contains a 'Select stage:' dropdown where 'ExpertVisit' is selected. There's also an 'Audit note:' text area and two buttons at the bottom: 'Cancel' and 'Save' (disabled) and '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.

E-2001
Evaluate and Sell a Vehicle

Priority 10
Status NEW
Created Author@Auto 2 minutes ago
Updated Author@Auto less than a minute ago

Draft Mode

Connector when does not yet exist.
Choose a connector to take: Select... (Click to create)

In Flow:
On Step:

Cancel Save Submit

Vehicle Picture

- 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.

Draft Mode

Connector when does not yet exist.
Choose a connector to take: Else (Click to create)

In Flow: VINcheck
On Step: Valid VIN?

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

E-2001
Evaluate and Sell a Vehicle

Priority 10
Status NEW
Created Author@Auto 5 minutes ago
Updated Author@Auto less than a minute ago

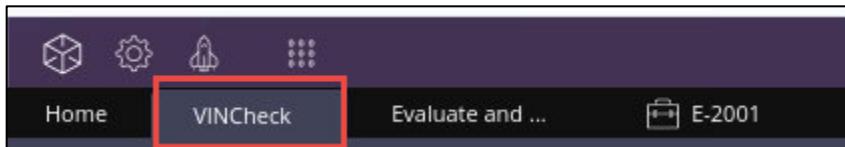
ExpertVisit (1)

Test

Cancel Save Submit

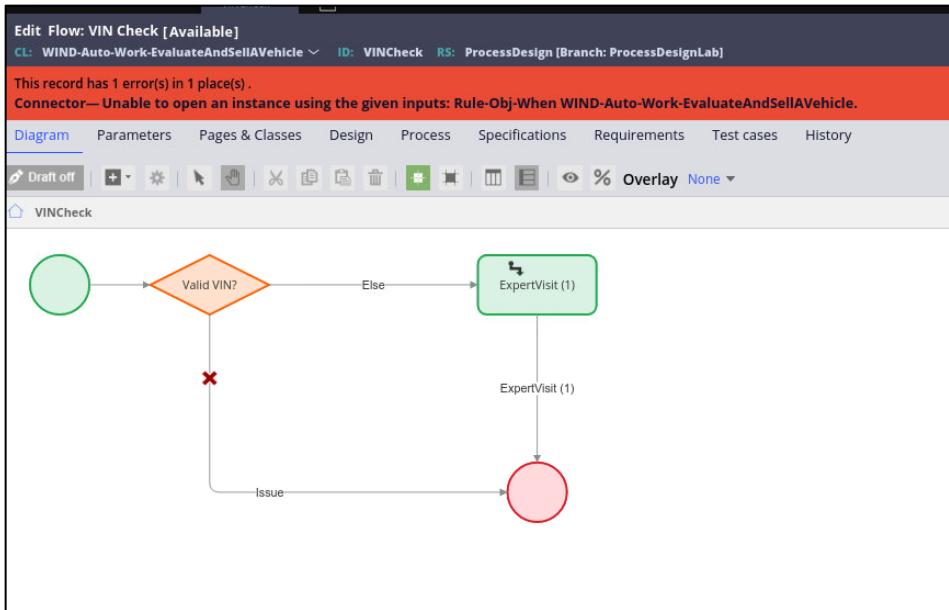
Vehicle Picture

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

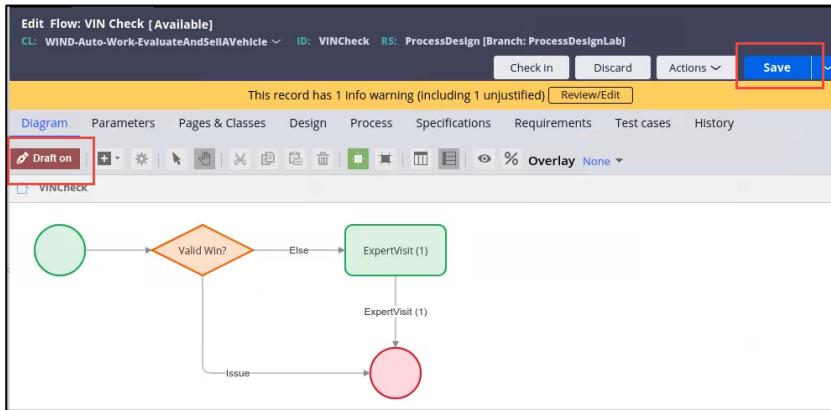


- Click on **Draft on** button. This will change the flow to **Draft off** mode. **Click Save**.

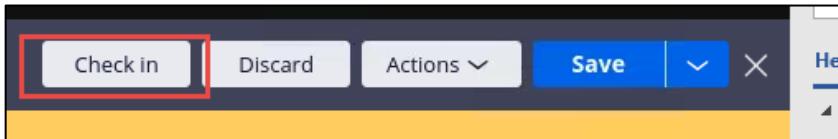
Pega shows an error messaging indicating that the flow is incomplete.



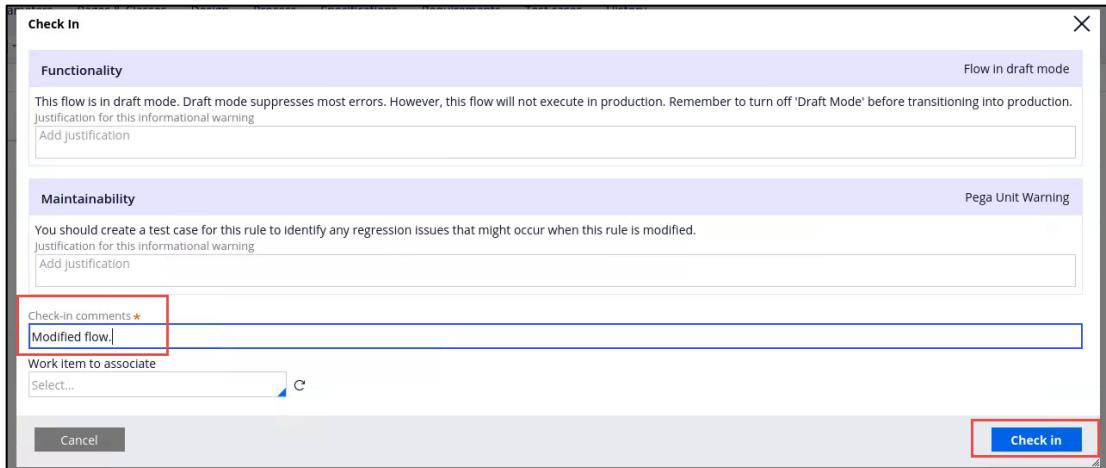
9. Turn **Draft on**. The error message will not be displayed. Click **Save**.



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.

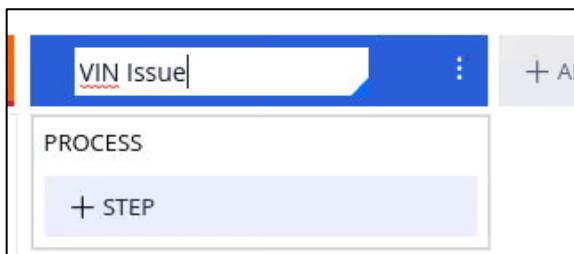


2. Add a new Alternate Stage called VIN Issue.

- a. Click on the +Alternate Stage icon.

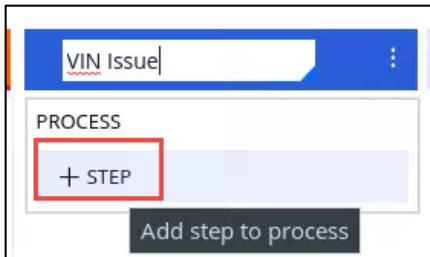


- b. Name the Stage VIN Issue.

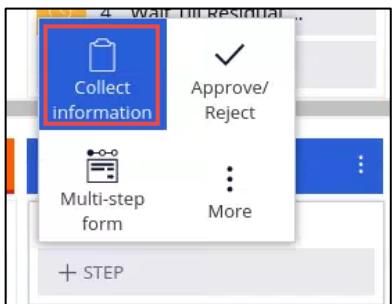


3. Add a Process with steps to the VIN Issue stage.

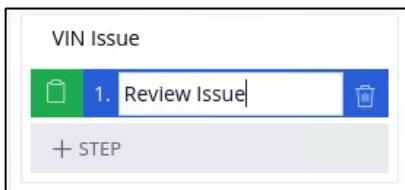
- a. Mouse over the +process and add click on the +Step



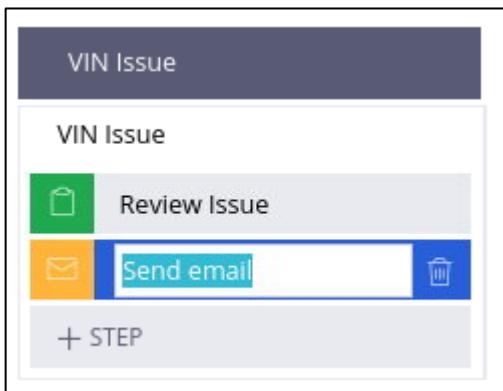
b. Adding a new step by choosing **Collect information**.



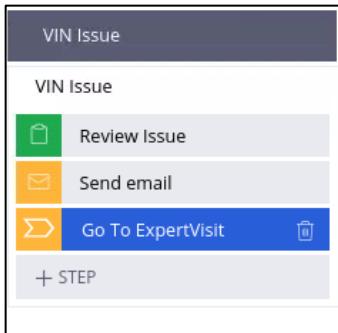
c. Call the step Review Issue.



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

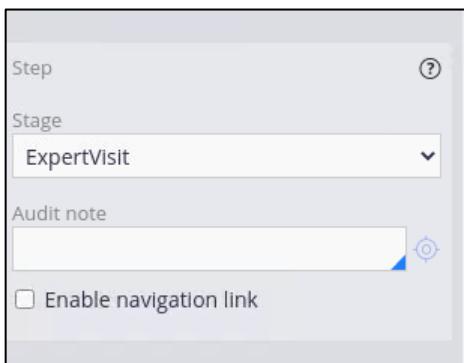


e. Add another step by selecting **+Step > More > Automations > Change to a Stage > Select**. Rename the step to **Go To ExpertVisit**.

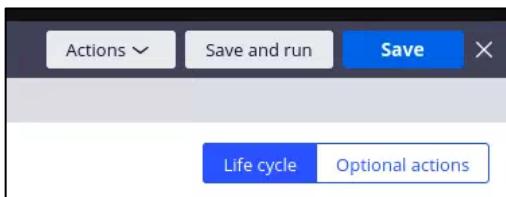


f. Configure the step properties from the context panel on the right.

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



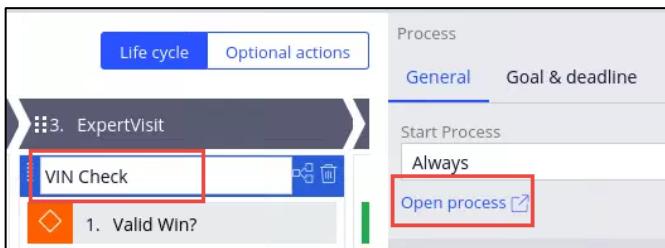
4. Click **Save** button.



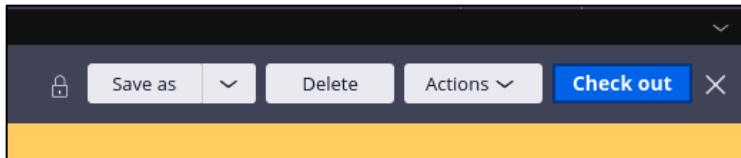
Task 5: Add business logic to send case to alternate flow

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

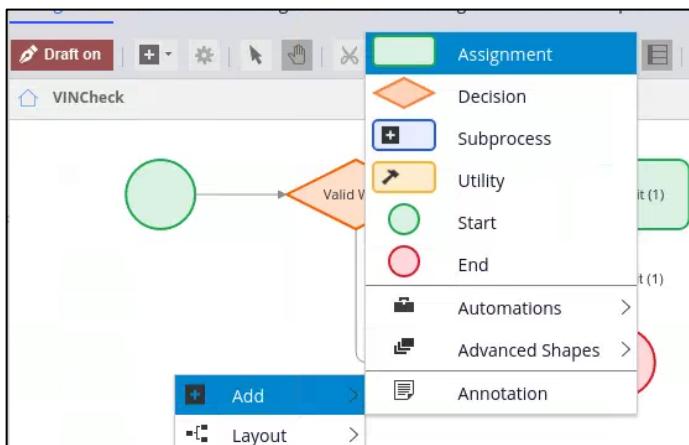
a. Select **VIN Check** process and click the **Open process** link.



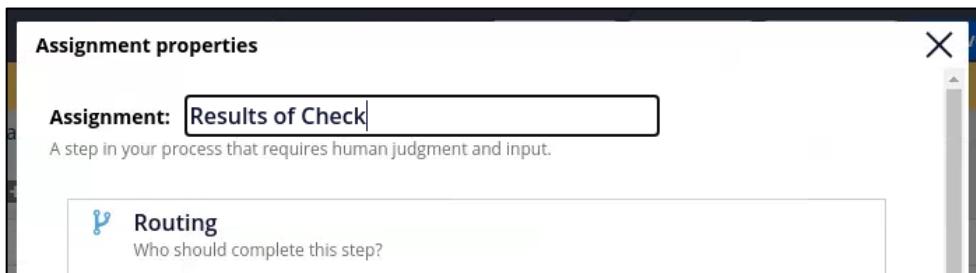
b. The flow rule appears. Click **Check out**.



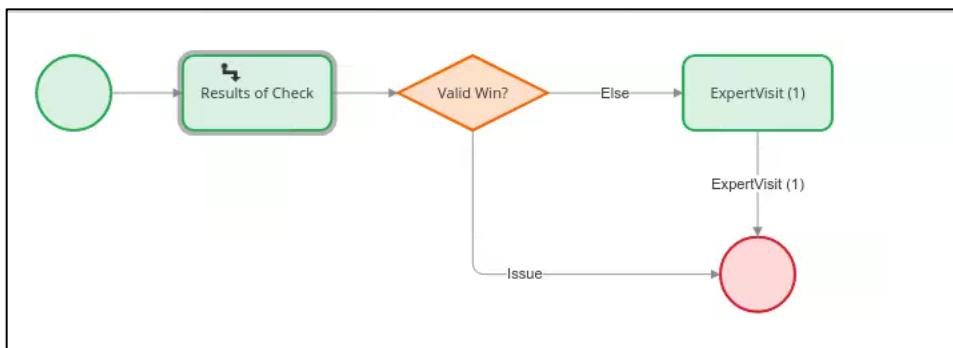
- c. Right-click in the pallet and Add an assignment shape.



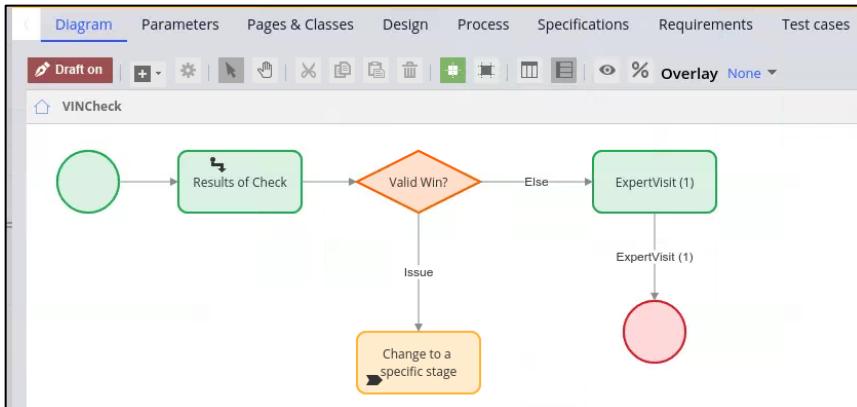
2. Name the new assignment shape **Results of Check**.



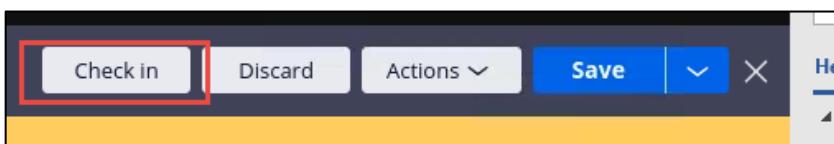
- a. The connector coming out of the Start shape should be connected to the new assignment shape. (Move shapes around in the pallet to make room.) Click **Submit**.



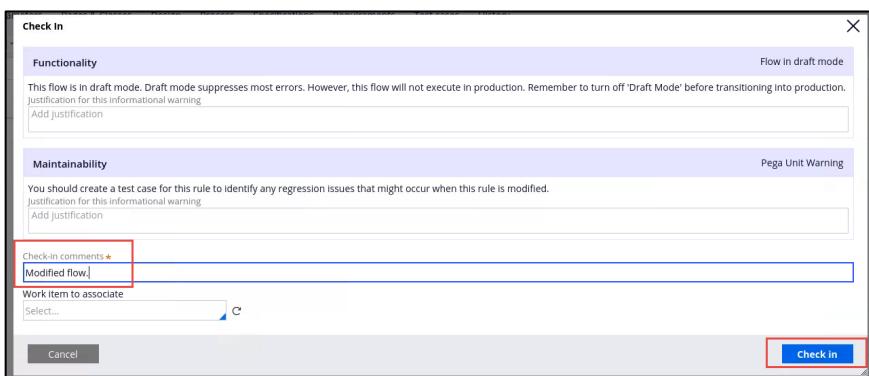
- b. Right click in the pallet and add a **Change to a Stage** Automation shape. Connect the **Issue** connector to the shape.



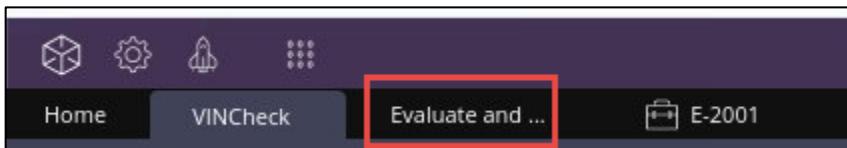
3. Click **Save**.
4. Click **Check in**.

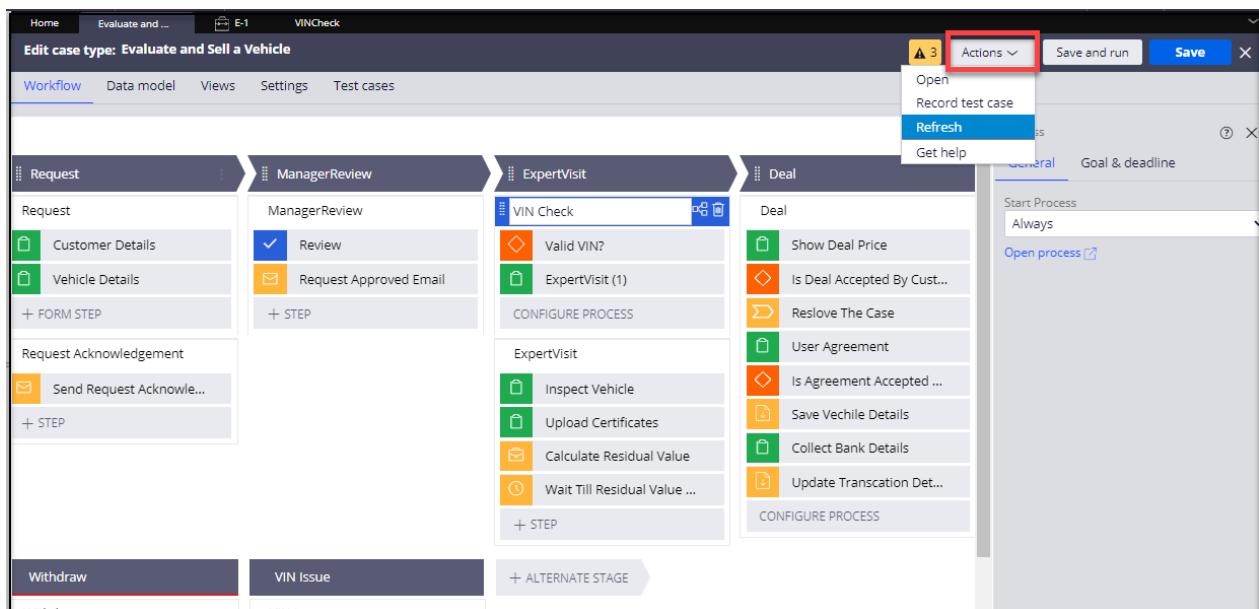


5. Enter a **check-in comment**. Click **Check In**.

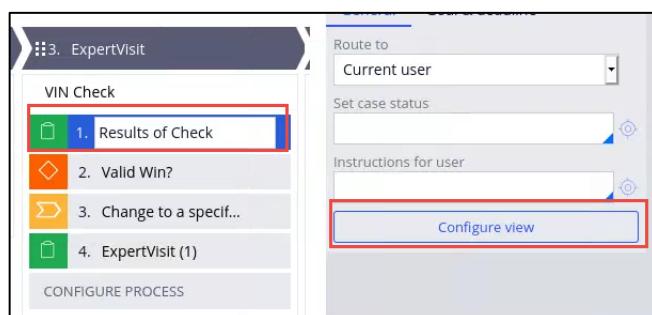


6. The Evaluate and Sell case type is still open. Navigate to the tab and click **Actions > Refresh** on the case type.

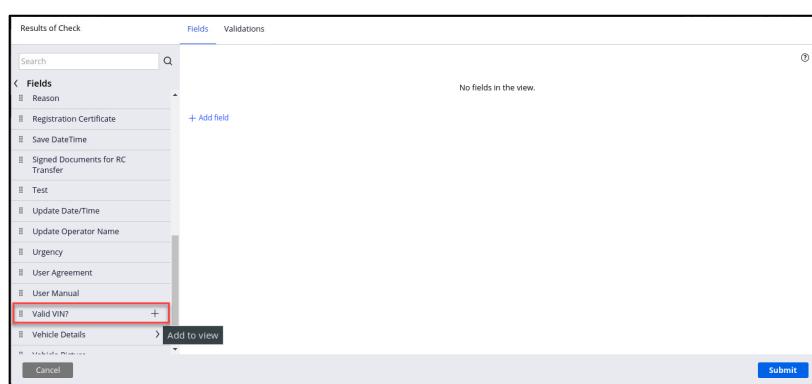




7. Click on **Results of Check**. In the properties panel, click on **Configure View**.



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



9. Click **Submit**.

Results of Check

Fields Validations

Search Q

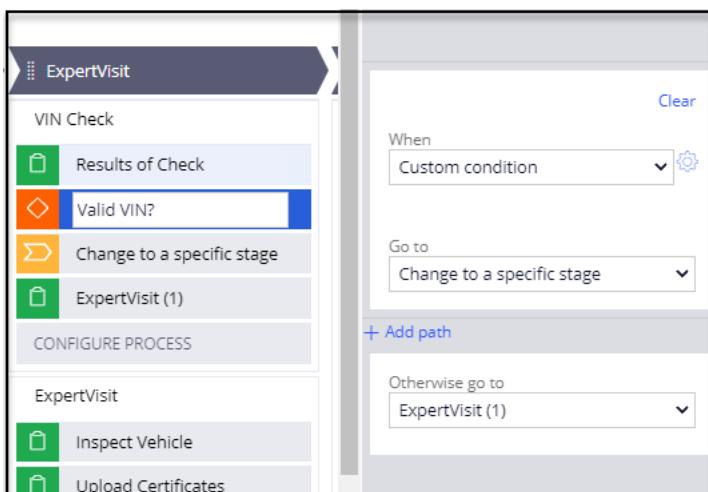
Fields > Views >

Field: Valid VIN? Type: Picklist Options: Optional

+ Add field

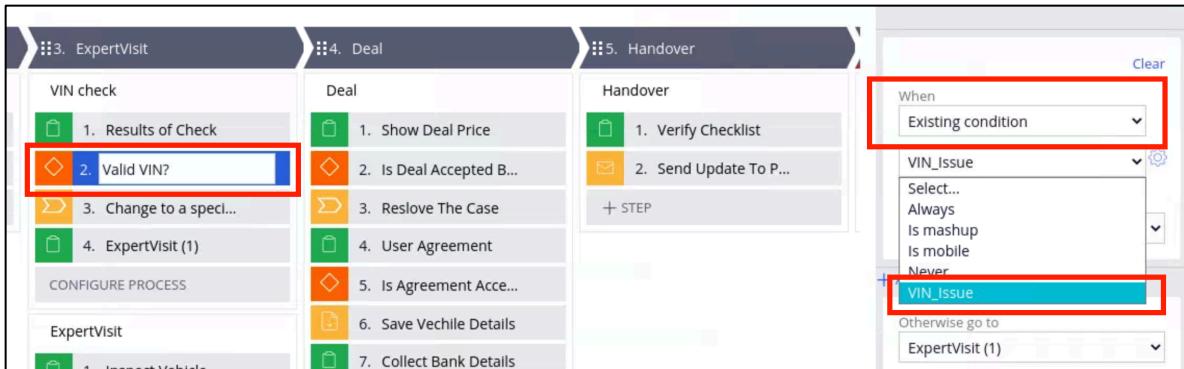
Cancel Submit

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).

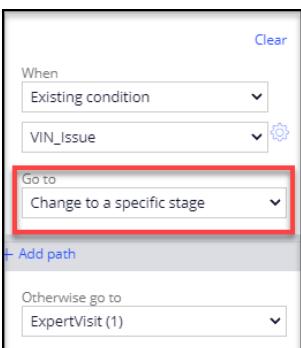


- a. Change the **When** to Existing condition. Select **VIN_Issue** from the next drop down.

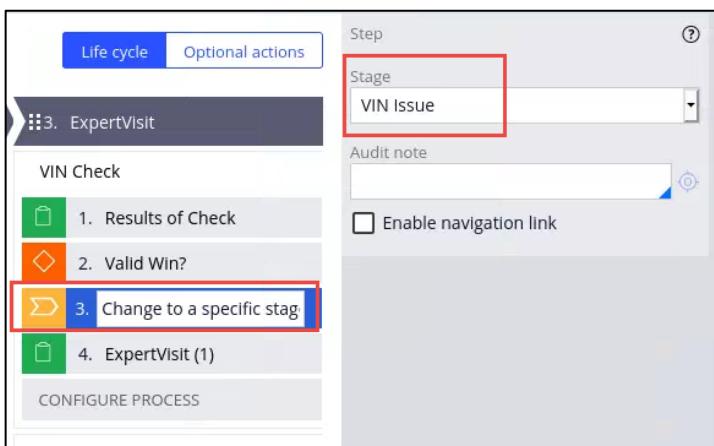
Note: A When condition is already created to use in this lab.



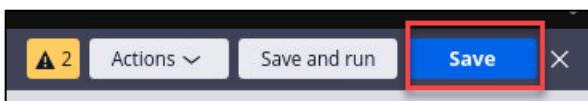
b. Set **Go to** drop down to **Change to a specific stage**.



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



11. Click **Save**.

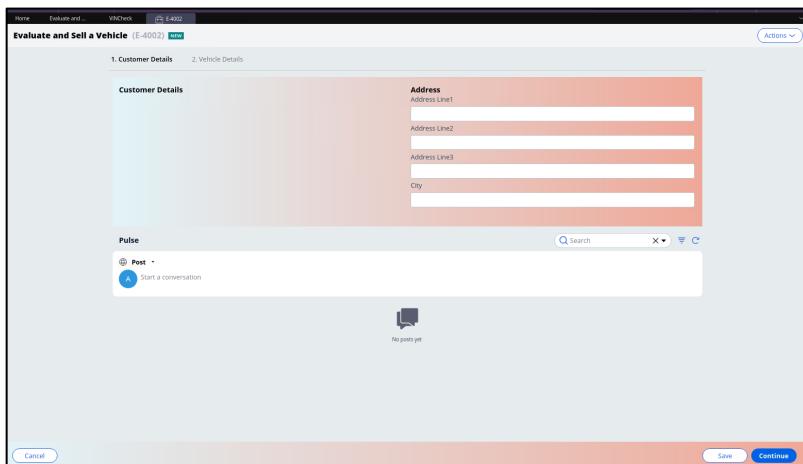


Task 6: Verify when the VIN is invalid the case is sent to the alternate flow

1. Click **Save and Run**.

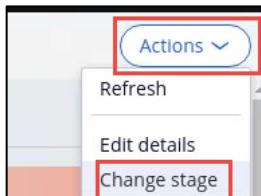


2. A new case will start in a new tab in Dev Studio.

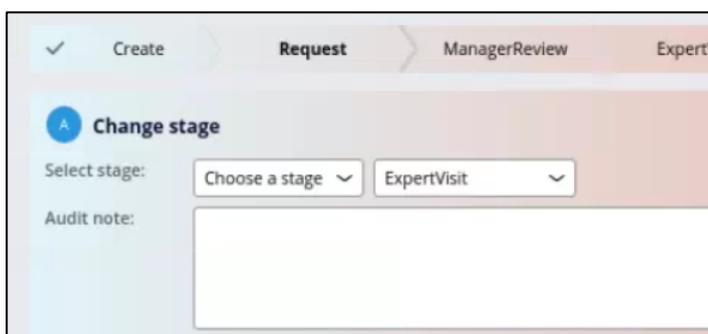


3. To unit test the Flow rule **VIN Check**, we want to skip stages to go directly to the ExpertVisit stage.

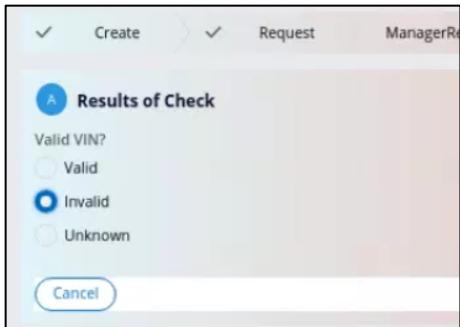
a. Click **Actions > Change Stage**.



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

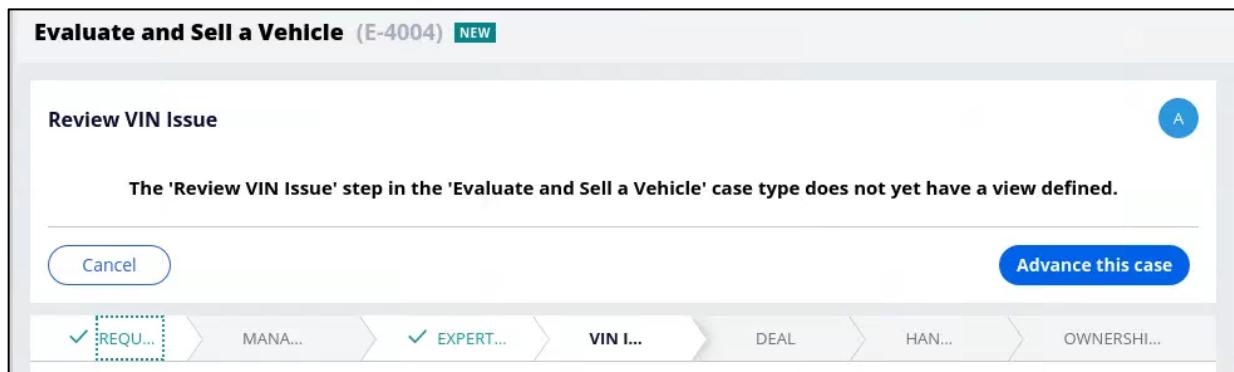


4. Select **Invalid** and select **Submit**.



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 **Review 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.

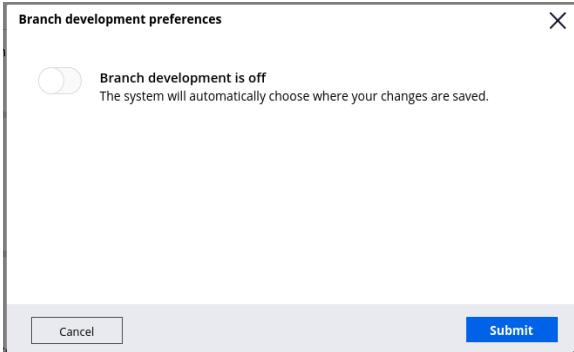
Detailed Steps

Task 1: Log in and enable branch development

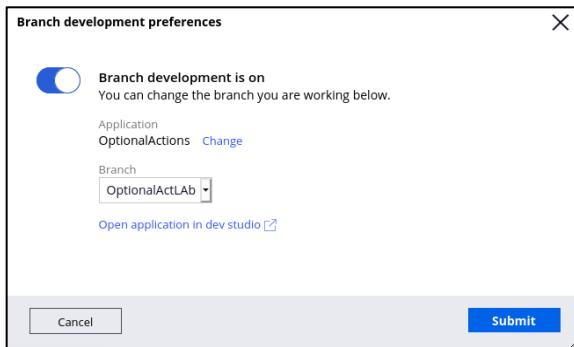
1. Log into Pega using the username **Author@OptionalActions** and the password of **rules**.
2. From the title bar, click the **Branch development** icon.



3. The following appears:

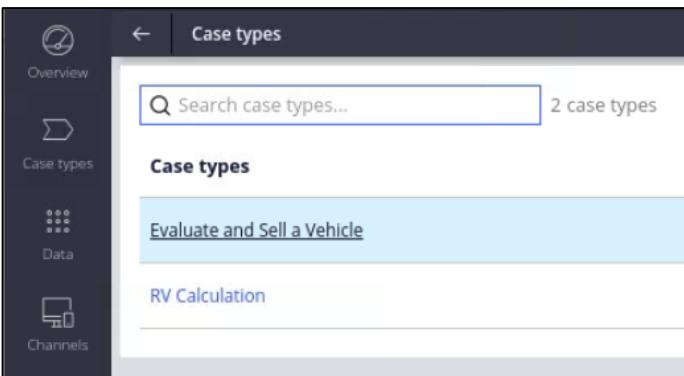


4. Move the **toggle button slider** to turn branch development on.
5. From the Branch dropdown menu, ensure that **OptionalActLab** is selected, then click **Submit**.



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**.

The screenshot shows the Pegasystems interface with three parallel processes:

- Approval Rejection**: Contains a step to "Send Rejection email".
- Withdraw**: Contains steps to "Collect Withdraw Request" and "Send Withdraw Email".
- VIN Issue**: This process is currently active.

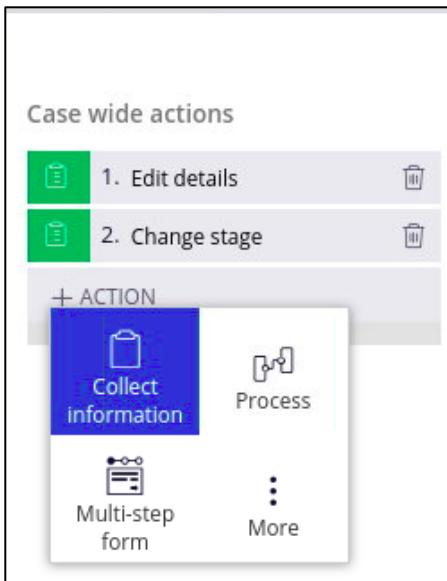
3. Add a **Collect Information** step and rename it **VIN Issue**. Then, click **Save**.

The screenshot shows the "VIN Issue" process editor. On the left, a sidebar lists available steps: "Collect information" (selected), "Approve/Reject", "Multi-step form", and "More...". On the right, the process definition shows a single step named "VIN Issue".

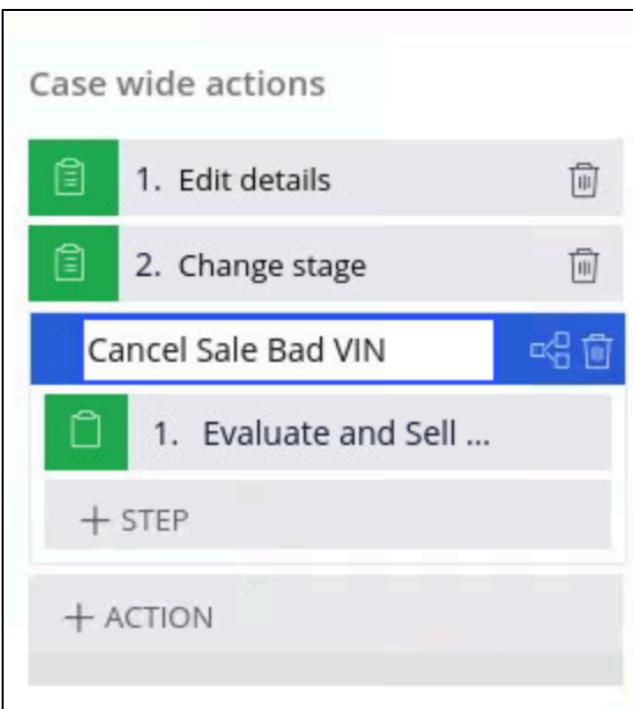
4. Click the **Optional actions** button located above the last stage.

The screenshot shows the process editor with a red box highlighting the "Optional actions" button located above the final stage of the workflow.

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.

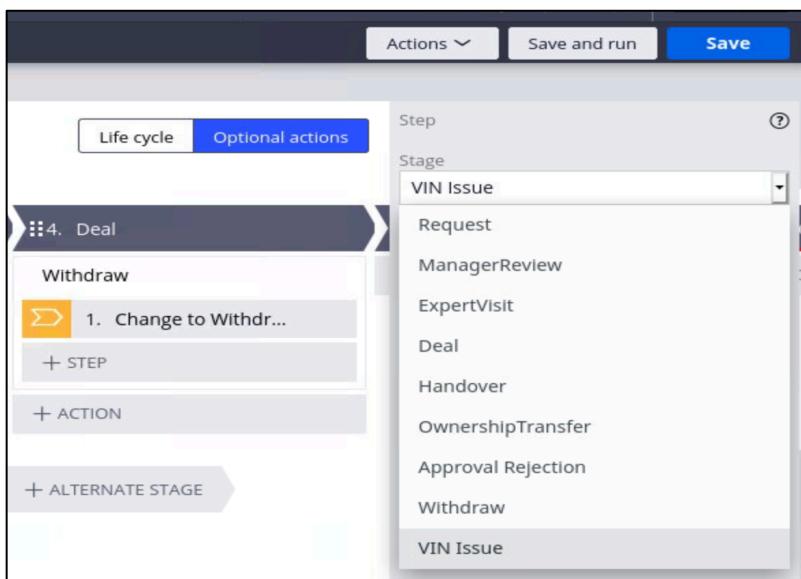


8. Click +Step > More > Automation > Change to a Stage. Then click Select.



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**

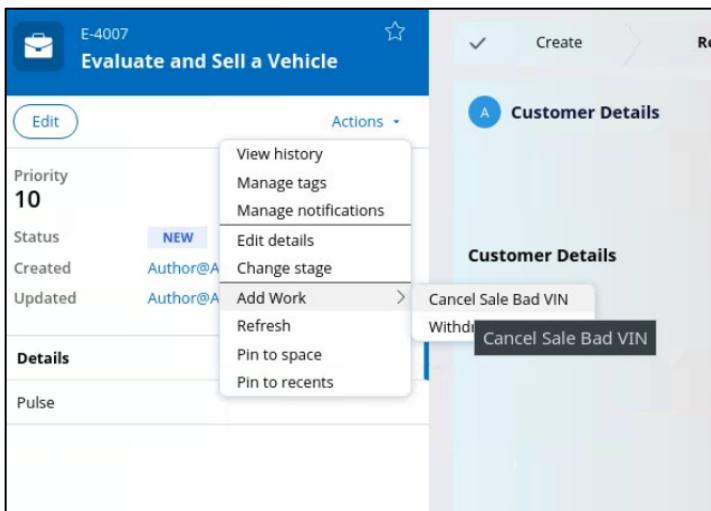


When the end user runs the optional process "Cancel Sale BAD VIN", the user should enter the reason for cancelling the sale and the case should then move to the VIN issue stage.

Task 3: Verify your work

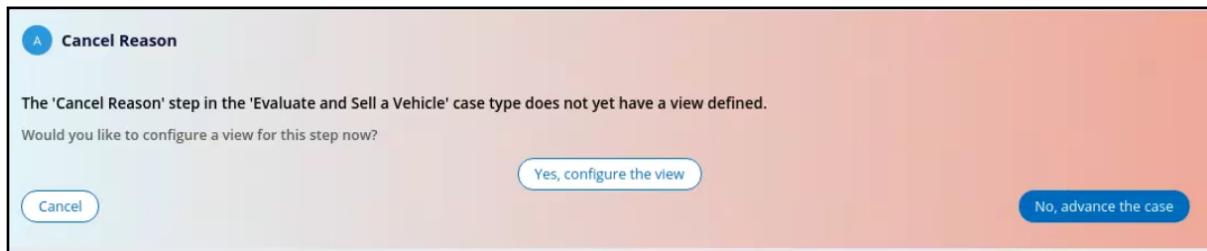
1. Click on **Life Cycle**. Click **Save and Run** to create a new case instance.
2. Click **Actions > Add Work > Cancel Sale Bad VIN**.

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

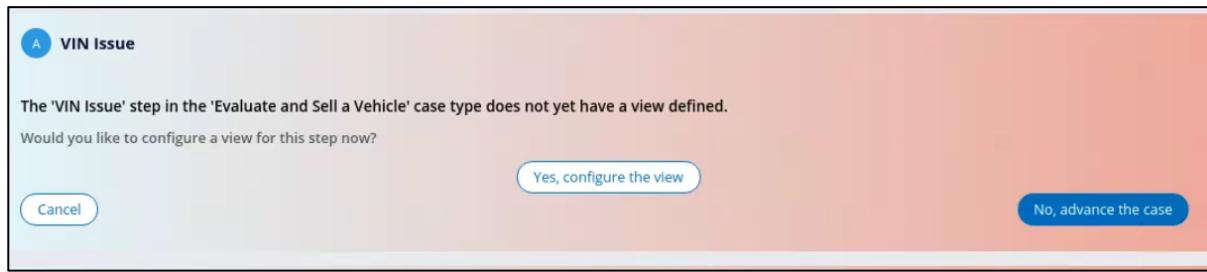


3. The Cancel Reason screen should display. Click **No, advance the case**.

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 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.

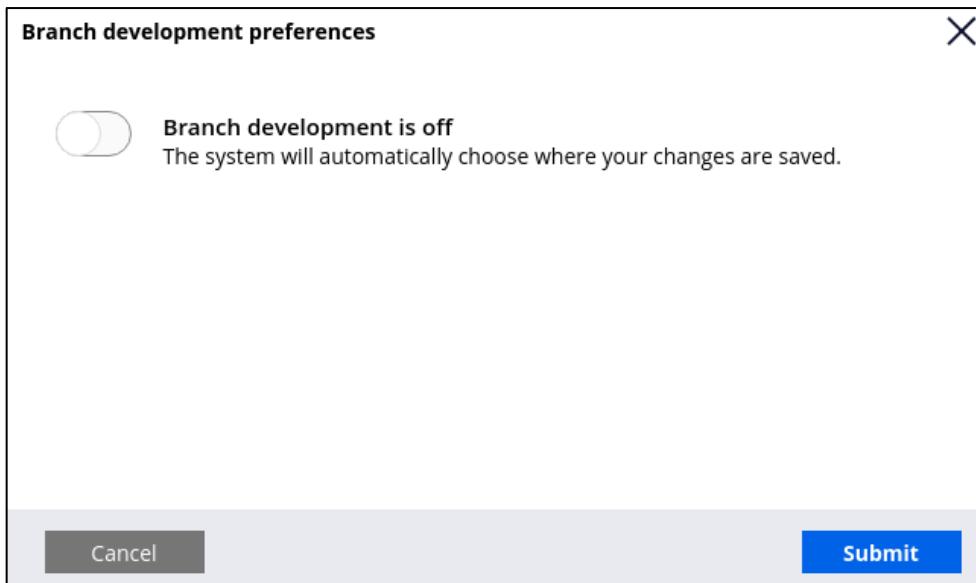
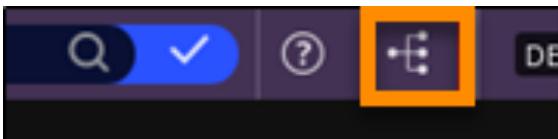
Detailed Steps

Task 1: Log in and enable branch development.

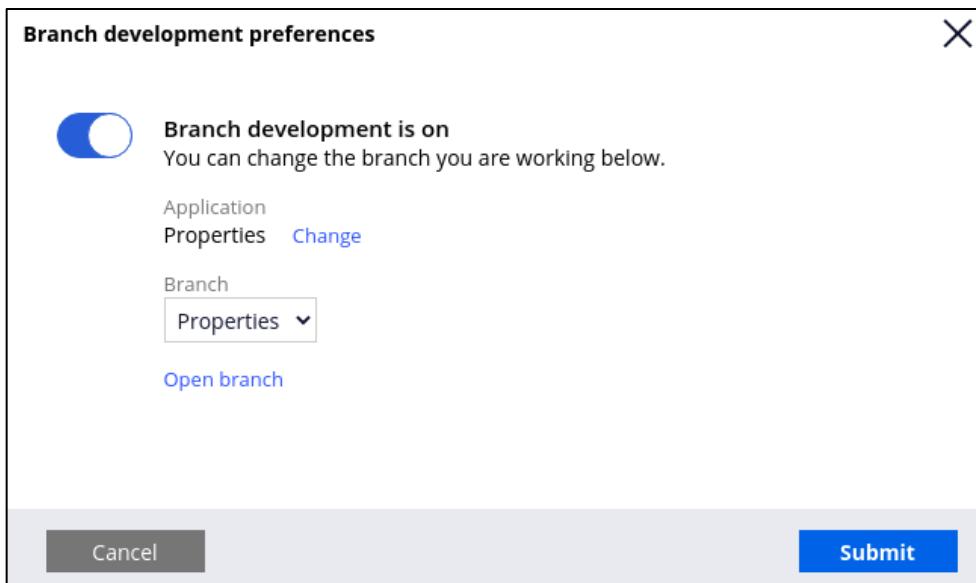
1. Log in and use the credentials **AdminProperties@auto** and password **rules**.

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.

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



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



- Click **Submit**.

Task 2: Create the Request Status Data Type

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

The screenshot shows the 'Case types' section of the App Studio interface. A search bar at the top right contains the placeholder 'Search case types...'. Below it, a table lists two entries:

Case types	Type	Referenced data objects
Evaluate and Sell a Vehicle	Standard	...
RV Calculation	Standard	...

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

The screenshot shows the 'Case life cycle' configuration screen for the 'Evaluate and Sell a Vehicle' case type. The workflow stages are: Create, Request, ManagerReview, ExpertVisit, and Deal. The 'Request' stage is currently selected and highlighted with an orange box. Within the Request stage, the 'Customer Details' step is also highlighted with an orange box. The right-hand panel displays a list of available steps for the Request stage, with several steps like 'Inspect Vehicle' and 'Upload Certificates' highlighted in green.

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

The screenshot shows the 'Customer Details' field configuration screen. On the left, there's a sidebar with 'Fields', 'Views', and 'Data objects' sections. The main area has tabs for 'Fields' and 'Validations'. Under 'Fields', a table shows one row for 'Customer Details':

Field	Type	Options
Customer Details	Field group	Auto OwnerDetails

Below the table is a link '+ Add field'.

- 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**.

Field name *

Type

Embedded data

Data object *

Select...

Search

Define new data object

Cancel Submit & add another **Submit**

This screenshot shows a configuration dialog for a field. At the top, there is a text input field labeled 'Field name *' containing 'My Preferences'. Below it is a dropdown menu labeled 'Type' set to 'Embedded data'. Underneath is a section labeled 'Data object *' with a dropdown menu labeled 'Select...'. A search bar is also present. A blue button labeled 'Define new data object' is visible. At the bottom are three buttons: 'Cancel', 'Submit & add another', and a prominent blue 'Submit' button.

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

Field name *

Type

Embedded data

Data object *

Select...

Data object name

 OK

Cancel Submit & add another **Submit**

This screenshot shows a confirmation dialog. It contains the same fields as the previous dialog: 'Field name *' (My Preferences), 'Type' (Embedded data), and 'Data object *' (Select...). However, the 'Data object name' field at the bottom is now filled with 'My Preferences' and has a blue border around it. There is an 'OK' button next to it. At the bottom are 'Cancel', 'Submit & add another', and a blue 'Submit' button.

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:

Field name *

Type

Embedded data

Data object *

My Preferences

Options

Single record
 List of records

Advanced

Cancel Submit & add another Submit

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

Field	Type	Options	
Customer Details	Data relationship	Auto	OwnerDetails Open
My Preferences	Data relationship	Auto	My Preferences Create new view... Open

+ Add field

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

My Preferences

Fields

Customer Details > My Preferences

No fields in the view.

+ Add field

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.

Customer Details

+ Add field

Field name
Payment method

Type
Picklist

Display as
Drop-down list

Picklist options
Local

Choices

Cash Delete

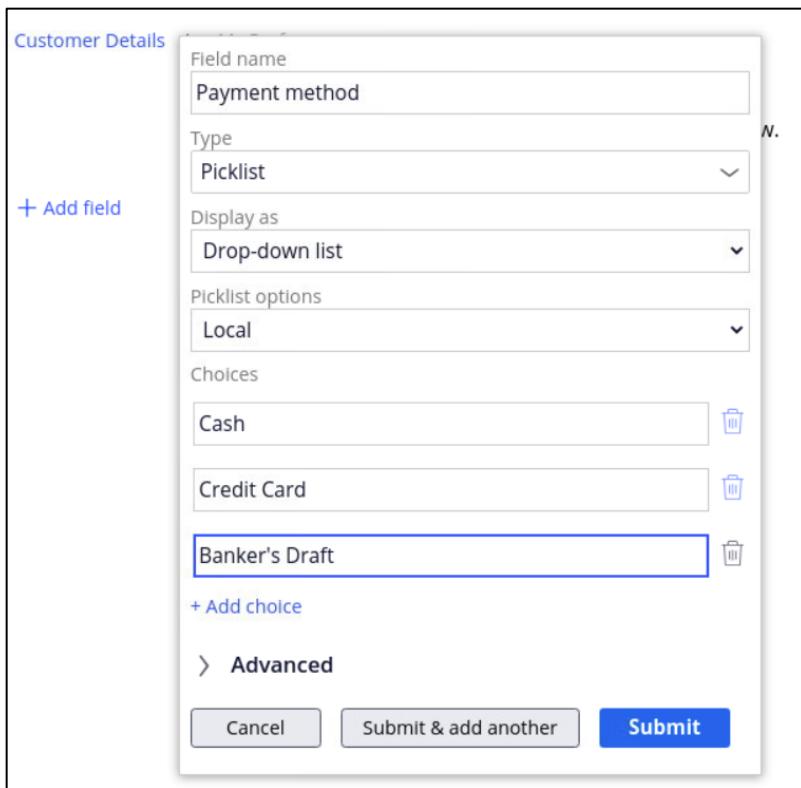
Credit Card Delete

Banker's Draft Delete

+ Add choice

Advanced

Cancel Submit & add another Submit



9. Click **Submit**.

10. Add the following additional fields.

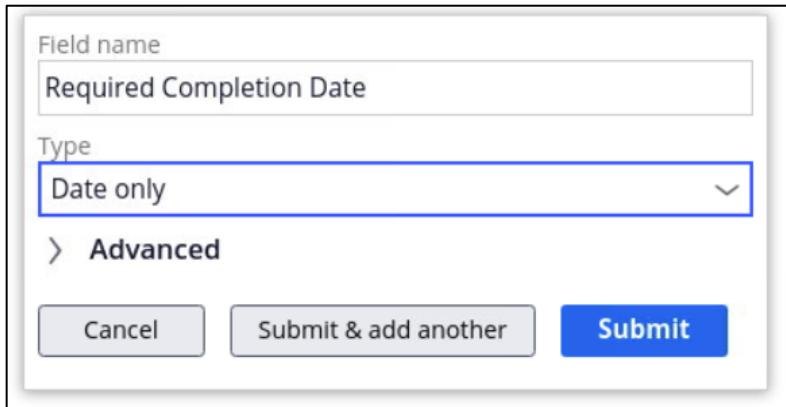
Field Name	Type
Required completion date	Date only
I am flexible on price	Boolean

Field name
Required Completion Date

Type
Date only

Advanced

Cancel Submit & add another Submit



Field name
I Am Flexible On Price

Type
Boolean

Advanced

Cancel **Submit & add another** **Submit**

Three fields should now appear.

Customer Details > My Preferences

Field	Type	Options
Payment method	Picklist	Optional
Required Completion Date	Date only	Optional
I Am Flexible On Price	Boolean	Optional

+ Add field

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

Task 3: Verify your work

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

E-4018 Evaluate and Sell a Vehicle

Priority 10 Status NEW Created mohith less than a minute ago Updated mohith less than a minute ago

Details Pulse

Customer Details

My Preferences

- Payment Method: Select...
- Required Completion Date:
- I Am Flexible On Price

Address

- Address Line1:
- Address Line2:
- Address Line3:
- City:

Vehicle Details

Actions

Save **Continue**

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

My Preferences

Payment method

Select...

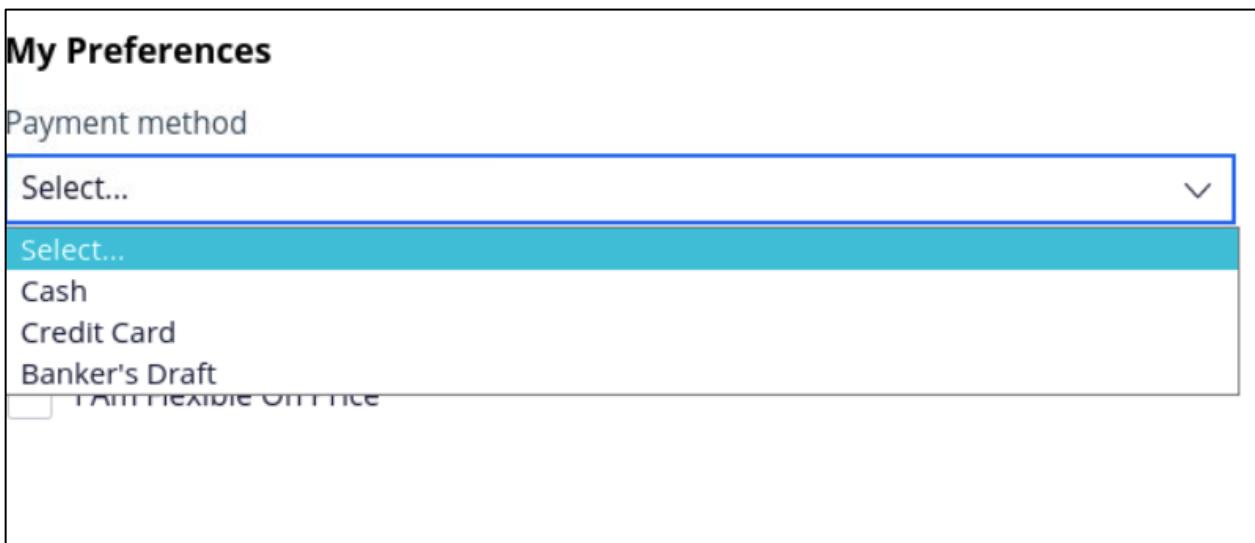
Select...

Cash

Credit Card

Banker's Draft

I Am Flexible On Price



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

E-4018 Evaluate and Sell a Vehicle

Priority 10 NEW

Status mohith less than a minute ago

Created mohith less than a minute ago

Updated mohith less than a minute ago

Details

Pulse

Customer Details

Customer Details

Vehicle Details

My Preferences

Payment Method: Cash

Required Completion Date: 3/25/2021

I Am Flexible On Price

Address

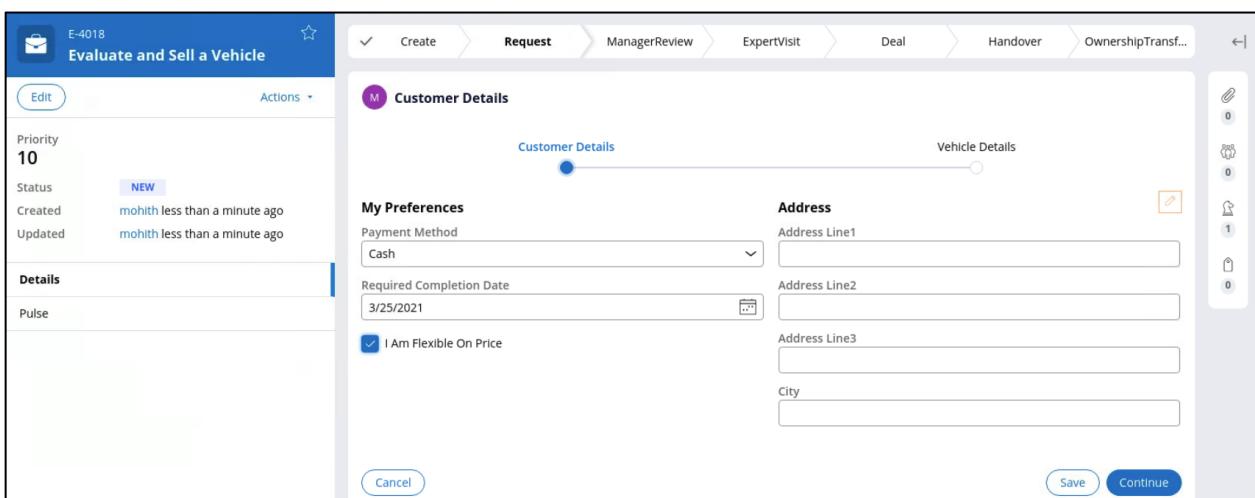
Address Line1

Address Line2

Address Line3

City

Cancel Save Continue



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.

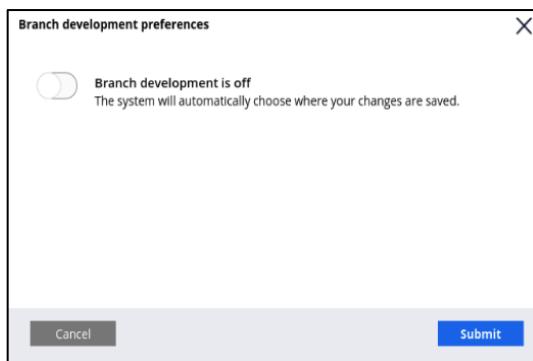
Detailed Steps

Task 1: Login and enable branch development

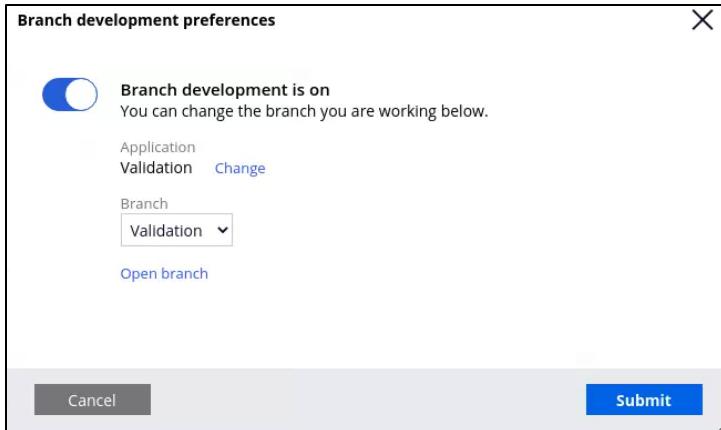
1. Log in using the credentials **Victor@Validation** and **rules**.
2. From the title bar click the **Toggle branch development** button.



The following appears:

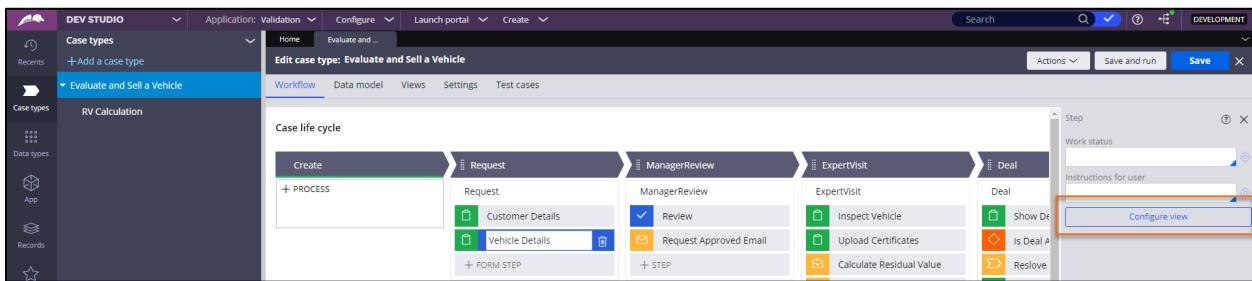


3. Move the slider to turn **branch development on**.
4. From the **Branch** dropdown ensure that **Validation** is selected and click **Submit**.

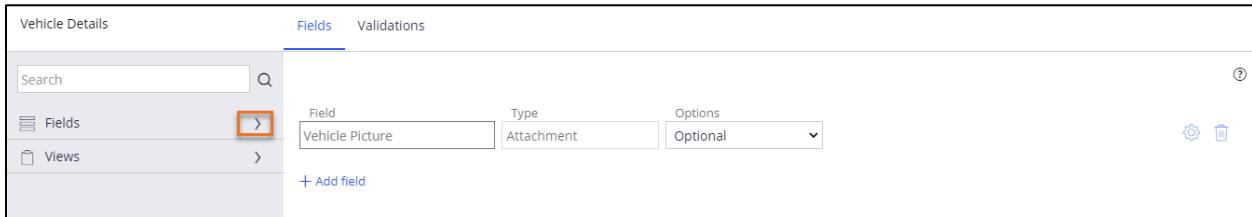


Task 2: Add Fields to the Vehicle Details View

- 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.



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



- Using the scroll bar in the Fields navigation frame, scroll down until you find **Vehicle Details**.
- Hover over **Vehicle Details** and a + icon will appear. Click the icon to **Add to view**.

Vehicle Details

Fields Validations

Search Q

Fields

- Reason
- Registration Certificate
- Save DateTime
- Signed Documents for RC Transfer
- Update Date/Time
- Update Operator Name
- Urgency
- User Agreement
- User Manual
- Vehicle Details**
- Vehicle Picture
- Withdraw Reason
- Work status

Field Type Options

+ Add field

Cancel

The Vehicle Details view form should now appear as follows:

Vehicle Details

Fields Validations

Search Q

Fields

- Reason
- Registration Certificate
- Save DateTime
- Signed Documents for RC Transfer
- Update Date/Time
- Update Operator Name
- Urgency
- User Agreement
- User Manual
- Vehicle Details**
- Vehicle Picture
- Withdraw Reason
- Work status

Field Type Options

Vehicle Details Auto

View Open

+ Add field

Cancel

5. In the View Options field:

1. Open the **drop down**
2. Select **Create default view**
3. Click **Open**

Vehicle Details Data relationship Vehicle Details

View

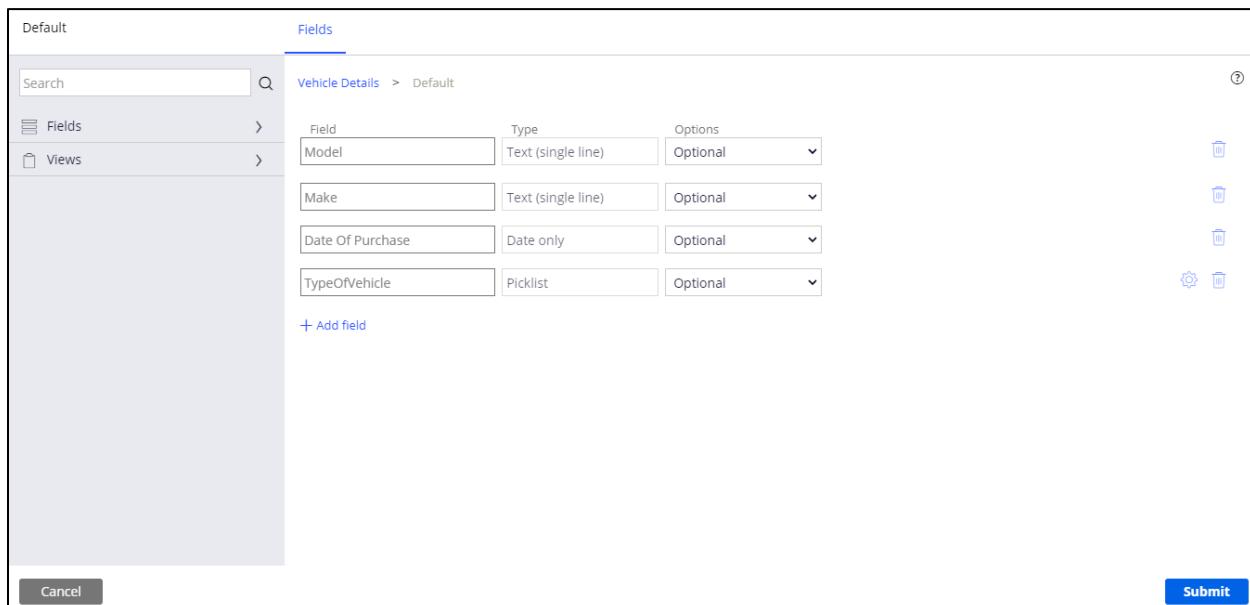
+ Add field

1 3
2

6. The following fields will prepopulate on the Default view form:

- Registration Number
- Model
- Make
- Colour
- Fuel Type
- Date Of Purchase
- TypeOfVechicle

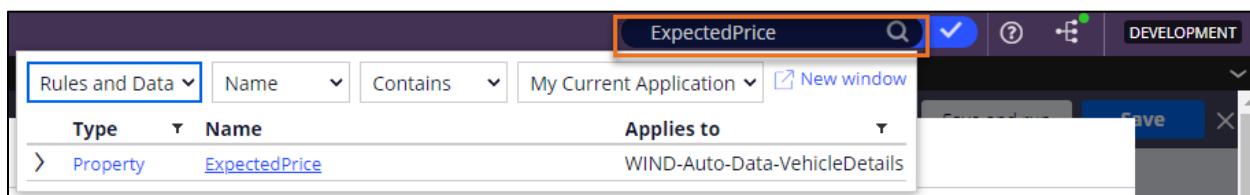
7. Using the **trash bin icon**  remove **Registration Number, Color, and Fuel Type** fields from the view. The resulting form should look like the following:



Field	Type	Options
Model	Text (single line)	Optional
Make	Text (single line)	Optional
Date Of Purchase	Date only	Optional
TypeOfVehicle	Picklist	Optional

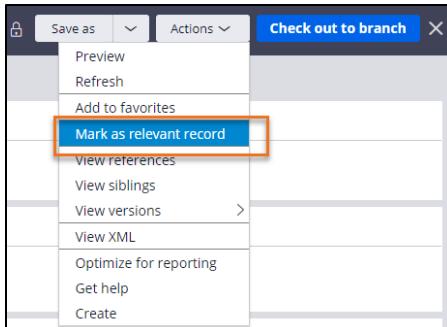
TIP: Only properties marked as relevant records appear by default.

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



Type	Name	Applies to
Property	ExpectedPrice	WIND-Auto-Data-VehicleDetails

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



Property: Expected Price [Available]
 CL: WIND-Auto-Data-VehicleDetails ID: ExpectedPrice RS: Auto:01-01-01

The record is marked as relevant at WIND-Auto-Data-VehicleDetails. [View](#)

General Advanced Specifications History

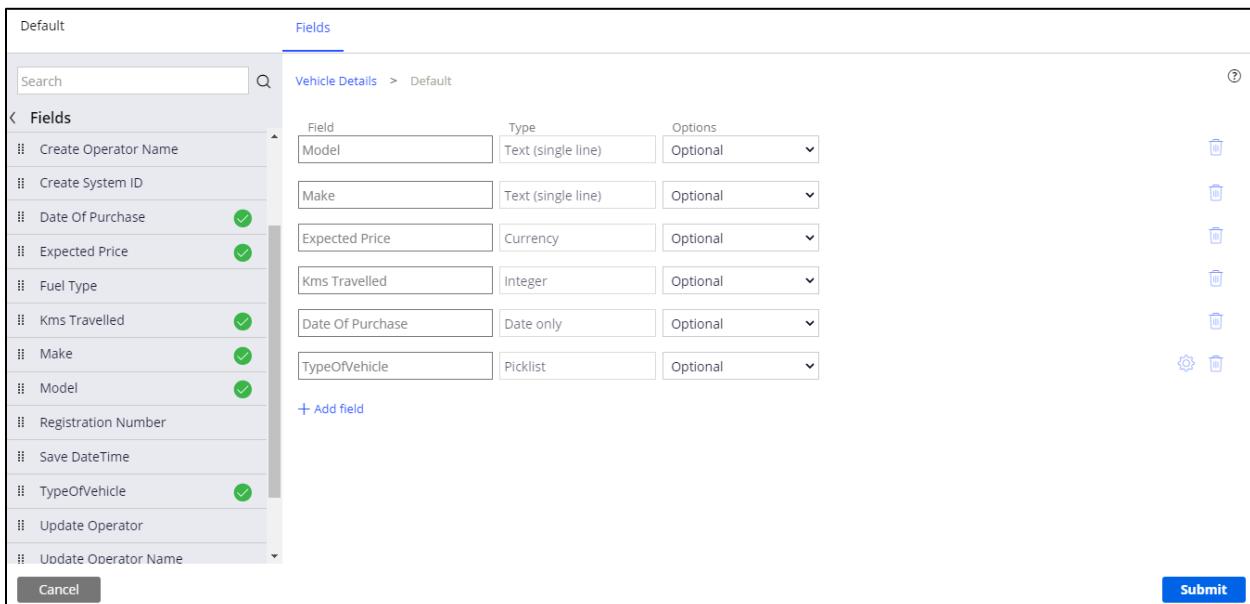
Property type
 Decimal

Data access
 Manual At run time, the user adds data to this property through the UI. Data transforms and other rules may be required to support this workflow.
 Automatic reference to class instance (linked)

Display and validation
 UI Control: pxCurrency
 parameters:
 Table type: None

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.



Default Fields

Vehicle Details > Default

Field	Type	Options
Model	Text (single line)	Optional
Make	Text (single line)	Optional
Expected Price	Currency	Optional
Kms Travelled	Integer	Optional
Date Of Purchase	Date only	Optional
TypeOfVehicle	Picklist	Optional

+ Add field

Cancel Submit

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.

The screenshot shows the 'Customer Details' section of a form. At the top, there are tabs for Create, Request, ManagerReview, ExpertVisit, Deal, Handover, and OwnershipTransfer. The 'Request' tab is active. Below the tabs, the title 'Customer Details' is displayed. The form contains several input fields: 'Text Input' (a simple text box), 'Email' (an email input box), and 'Phone' (a phone number input box) under the 'Customer Details' heading; and 'Address Line1', 'Address Line2', 'Address Line3', and 'City' under the 'Vehicle Details' heading. At the bottom right are 'Cancel', 'Save', and 'Continue' buttons.

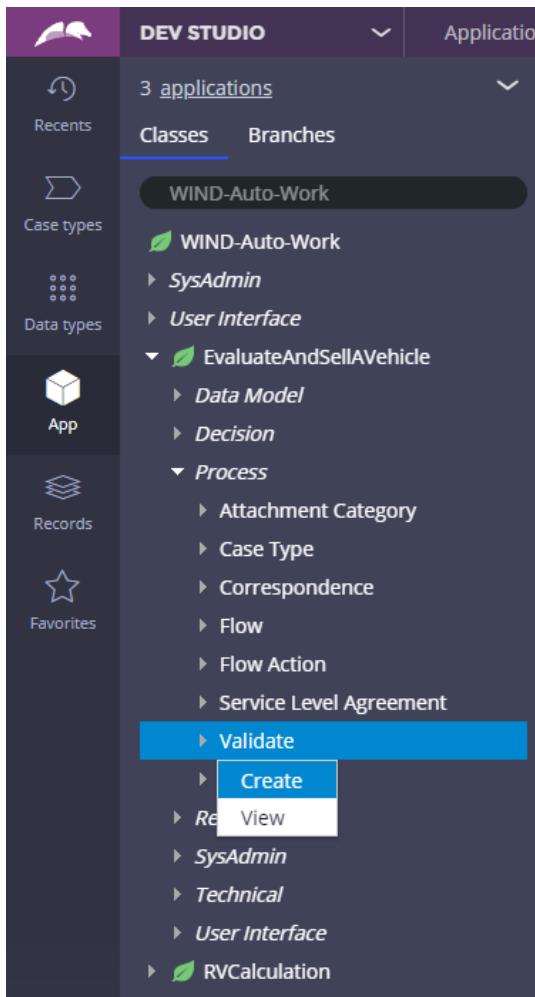
15. Enter values in the available fields and continue and click **Finish**.

The screenshot shows the 'Vehicle Details' section of a form. At the top, there are tabs for Create, Request, ManagerReview, ExpertVisit, Deal, Handover, and OwnershipTransfer. The 'Request' tab is active. Below the tabs, the title 'Vehicle Details' is displayed. The form contains several input fields: 'Vehicle Picture' (with 'Filename' and 'Attach' buttons), 'Model' (text box), 'Make' (text box), 'Date Of Purchase' (date picker), 'TypeOfVehicle' (dropdown menu with 'Select...'), 'Expected Price' (text box), and 'Kms Travelled' (text box). At the bottom right are 'Back', 'Save', and 'Finish' buttons. A cursor is visible over the 'TypeOfVehicle' dropdown.

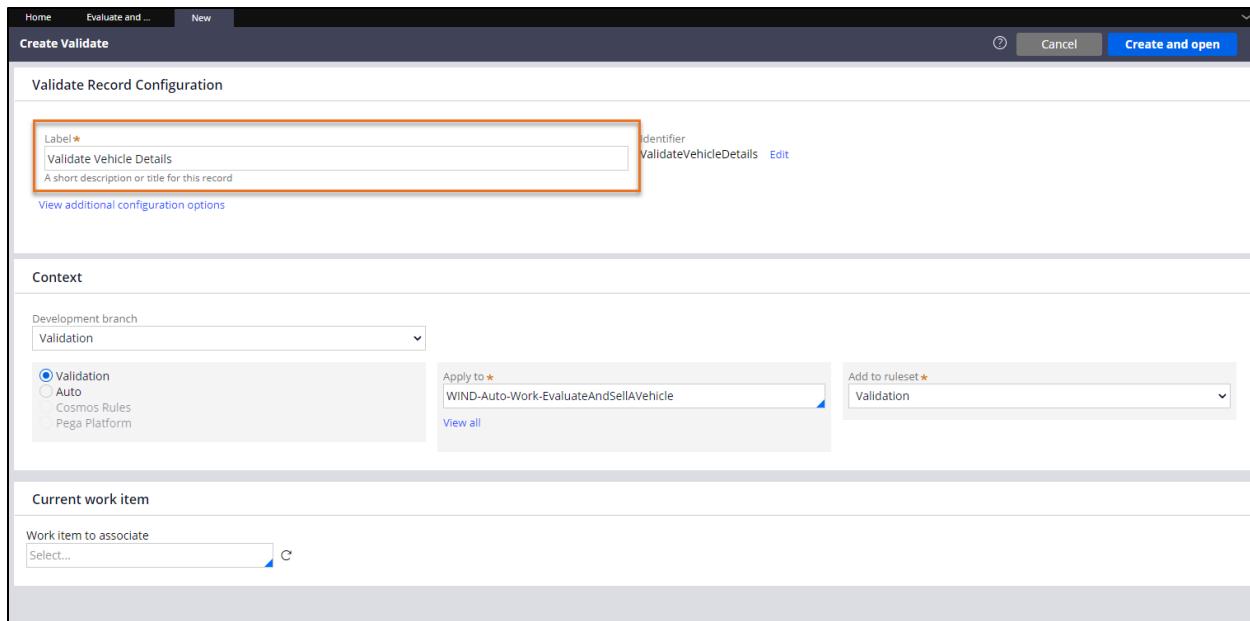
NOTE: In the next task we will add the validation rule which checks for the proper date, kilometers travelled and price.

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

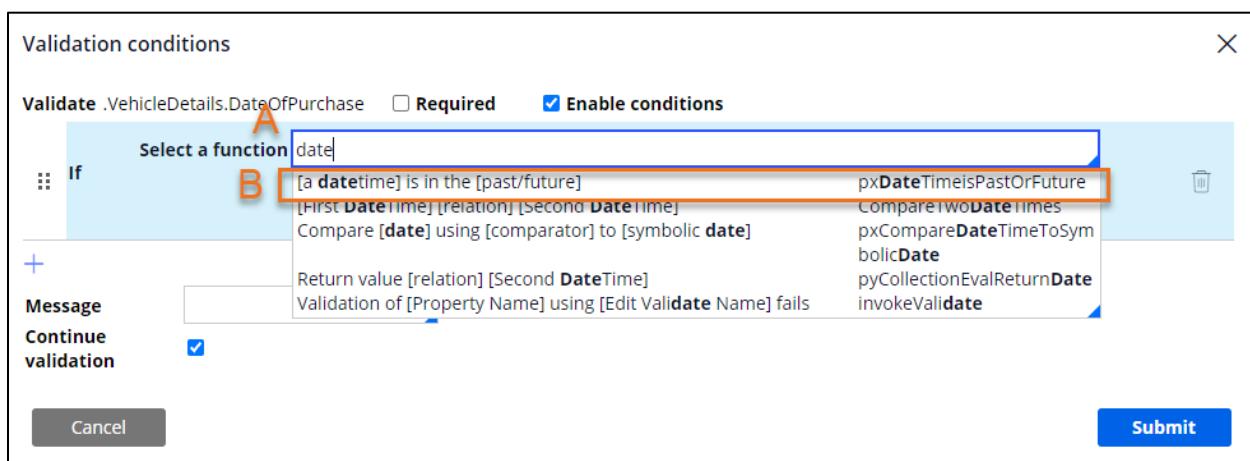
1. In **DEV STUDIO** select the **App explorer** from the explorers panel on the far left.
 - a. Expand the **EvaluateAndSellAVehicle** class by clicking the small triangle icon on the left of the class name.
 - b. Expand the **Process** category to see the rule types.
2. **Right-click** on the **Validate** 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."**

Validation conditions

Validate .VehicleDetails.DateOfPurchase **Required** **Enable conditions**

Select a function [a datetime] is in the [past/future]

If **.VehicleDetails.DateOfPurchase** is in the **Future**

Message "Please enter a past date."

Continue validation

Cancel **Submit**

- d. Please click **Submit** to close the condition.
6. Add another property to validate by clicking the plus **+** icon in the **PROPERTY** column.

PROPERTY	*Req Conditions
.VehicleDetails.DateOfPurchase	IF .VehicleDetails.DateOfPurchase is in the Future THEN display message: Please enter a past date.
(+)	
ADDITIONAL VALIDATION	

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

PROPERTY	*Req Conditions
.VehicleDetails.DateOfPurchase	IF .VehicleDetails.DateOfPurchase is in the Future THEN display message: Please enter a past date.
(+)	
.VehicleDetails.KmsTravelled	No additional conditions.
(+)	Add
ADDITIONAL VALIDATION	

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

Validation conditions

Validate .VehicleDetails.KmsTravelled **Required** **Enable conditions**

Select a function [first number] [relation] [second number]

If **.VehicleDetails.KmsTravelled** **IS LESS OR EQUAL TO** **0**

Message "Please enter a number greater than 0"

Continue validation

Cancel **Submit**

- 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:

Validate: Validate Vehicle Details [Available] CL: WIND-Auto-Work-EvaluateAndSellAVehicle ID: ValidateVehicleDetails RS: Validation [Branch: Validation]

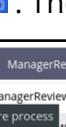
Validate Input Pages & Classes Specifications History

Default Validation

PROPERTY

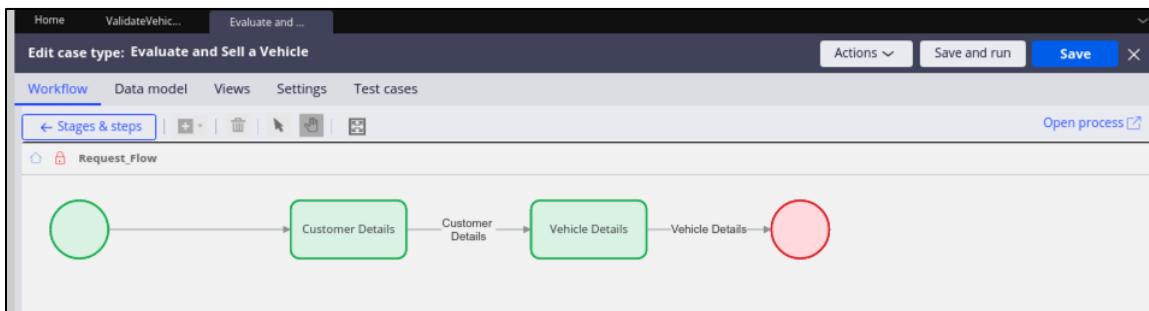
- .VehicleDetails.DateOfPurchase**
 - *Req. Conditions**
 - IF .VehicleDetails.DateOfPurchase is in the Future
THEN display message:
Please enter a past date.
- .VehicleDetails.KmsTravelled**
 - IF .VehicleDetails.KmsTravelled <= 0
THEN display message:
Please enter a number greater than 0
- .VehicleDetails.ExpectedPrice**
 - IF .VehicleDetails.ExpectedPrice <= 0
THEN display message:
Please enter an amount greater than 0

ADDITIONAL VALIDATION

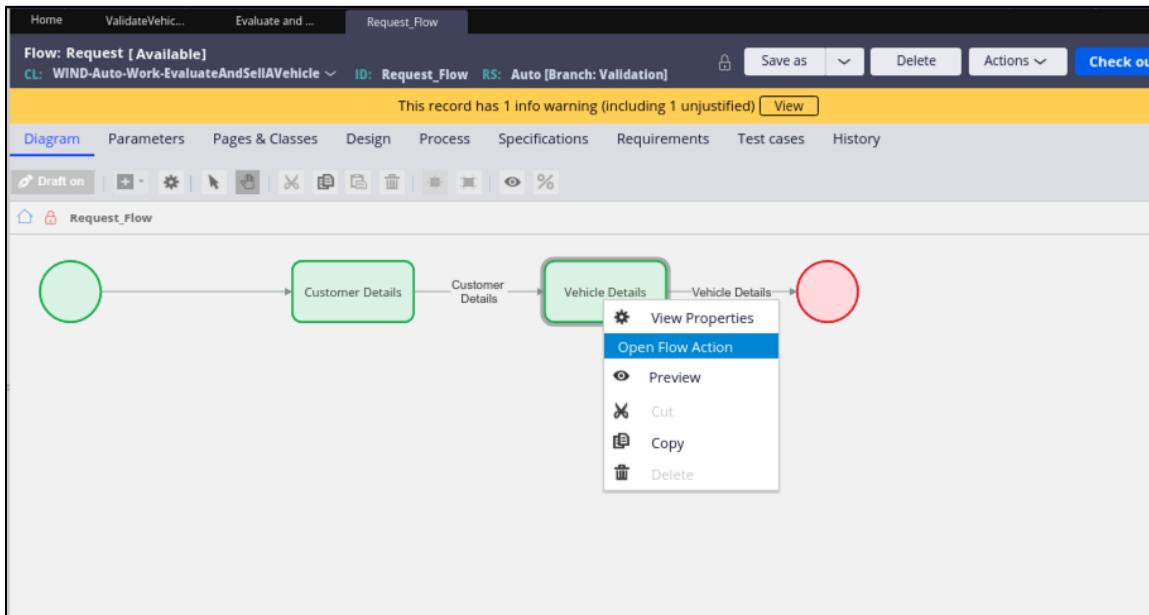
12. We need to reference the **ValidateVehicleDetails** Validate rule in the **VehicleDetails** Flow Action rule which references the **VehicleDetails** section rule.
13. In **DEV STUDIO**, select the **Evaluate and Sell a Vehicle** case type from the **Case types** explorer.
14. One way to access the **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



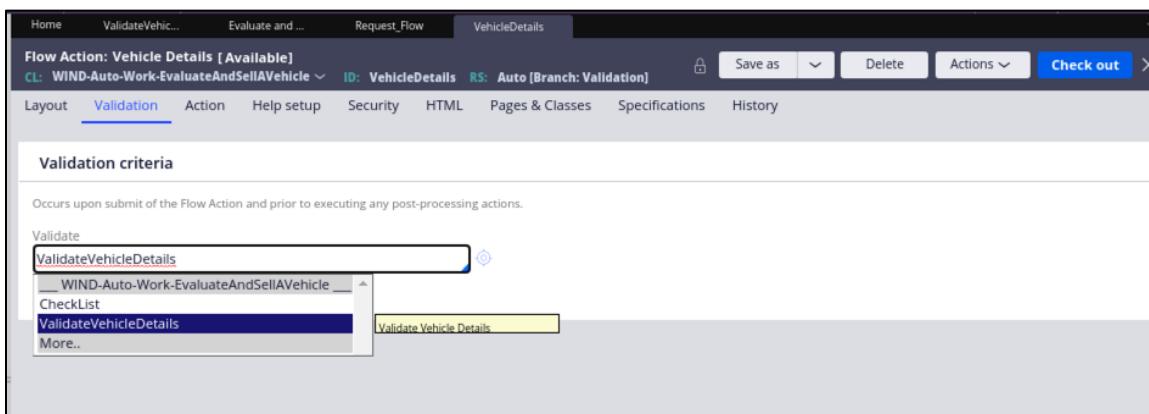
16. Once you have opened the process you may right click on the **Vehicle Details** assignment shape and open the associated **Flow Action rule**.



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.

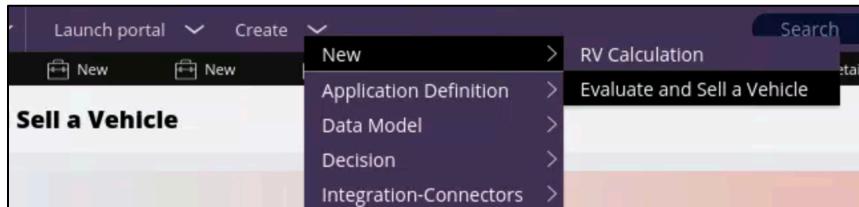
19. Save and check in the **Flow Action** rule.



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**.

A screenshot of the 'Evaluate and Sell a Vehicle' application. The left sidebar shows basic information like Priority (10), Status (NEW), and creation details. The main area is titled 'Customer Details' and contains fields for Text Input, Email, and Phone. A horizontal tab bar at the top right includes 'Customer Details' (which is active), 'Vehicle Details' (disabled), 'ManagerReview', 'ExpertVisit', 'Deal', 'Handover', and 'OwnershipTransfer'. At the bottom right are 'Save' and 'Continue' buttons.

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

Priority 10

Status NEW

Created Victor Validation 4 minutes ago

Updated Victor Validation 2 minutes ago

Details

Pulse

Vehicle Details

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

Customer 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

The screenshot shows a web-based application for evaluating and selling vehicles. On the left, there's a sidebar with basic information like priority (10), status (NEW), and recent activity from 'Victor Validation'. A 'Details' section is also present. The main area is titled 'Evaluate and Sell a Vehicle' and contains a 'Vehicle Details' form. This form includes fields for vehicle picture (with a 'Attach' button), model ('Rapid'), make ('Skoda'), and date of purchase ('4/22/2021'). The date of purchase field is highlighted with a red border and has an error message: 'Please enter a past date'. There are also validation messages at the top: 'Kms Travelled: Please enter a number greater than 0', 'Expected Price: Please enter a number greater than 0', and 'Date Of Purchase: Please enter a past date'. At the bottom right of the form are 'Save' and 'Finish' buttons.

4. Log off.

Creating a data relationship

Scenario

The mayor of MyTown asks you, the town's project manager, to enable residents who report problems online 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:

Task 1: Login and enable branch development

Task 2: Create the Embedded data field named Submitter information

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

Task 4: Verify your work

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

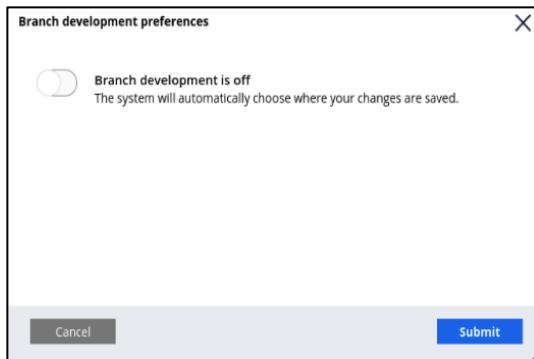
Detailed Steps

Task 1: Login and enable branch development

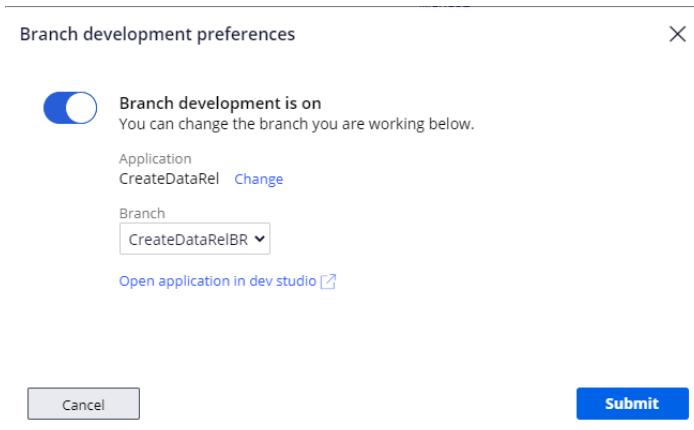
1. Log in using the credentials **admin@CreateDataRel** and **rules**.
2. From the title bar click the **Toggle branch development** button.



The following appears:

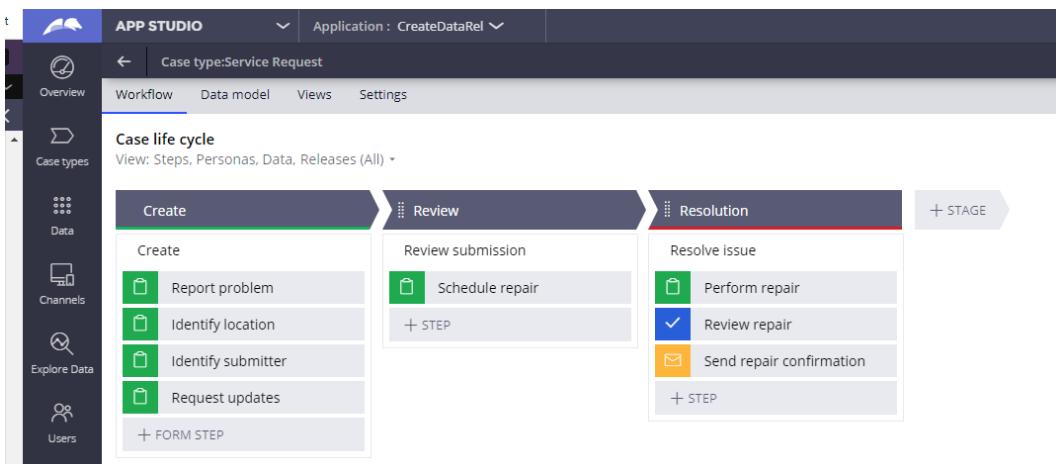


3. Move the slider to turn **branch development** on.
4. From the **Branch** dropdown ensure that **CreateDataRelBR** is selected and click **Submit**.

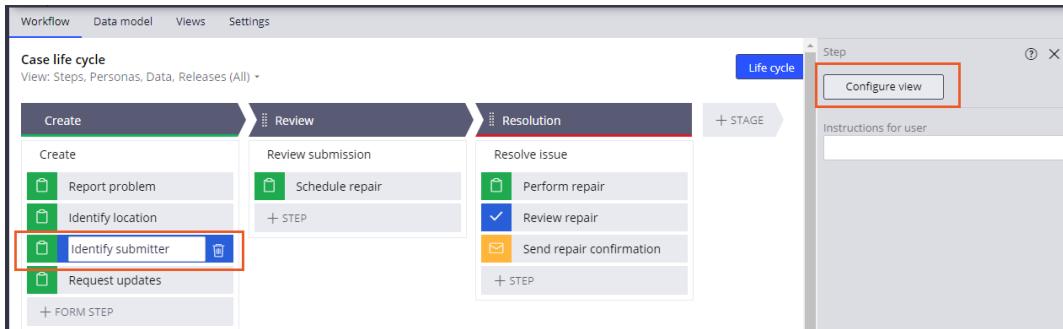


Task 2: Create the Embedded data field named Submitter information

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**

Field name *

Type

Embedded data

Data object *

Person

Options

Single record

List of records

> Advanced

Cancel Submit & add another **Submit**

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**.

Field	Type	Options
Submitter information	Data relationship	Auto Submitter
	View	Create default view... Open

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.

The screenshot shows the 'Fields' configuration window for the 'Identify submitter' step. It includes a search bar, a sidebar with 'Fields' and 'Views' options, and a main area with four defined fields:

Field	Type	Options
Address	Text (paragraph)	Optional
First Name	Text (single line)	Optional
Last Name	Text (single line)	Optional
Phone	Phone	Optional

Buttons for '+ Add field' and a question mark icon are also visible.

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.

The screenshot shows the 'Add field' dialog box. The main part shows a row with 'Field' (Address), 'Type' (Location), and 'Options' (Required). A sub-dialog is open for 'Field name' with the value 'Previous issues at this location'. Another sub-dialog is open for 'Data object' with the value 'Select...'. A third sub-dialog is open for 'Data object name' with the value 'Issues'.

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

Field name *

Type

Data object *

Options

Single record

List of records

> Advanced

Cancel Submit & add another Submit

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.

+ Add field to Previous issues at this location

Add new field

Add existing field

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

Field	Type	Options	
Address	Location	Optional	trash
Previous issues at this location	Data relationship (list)	Optional	Previous Issues gear trash
Date	Date only	Optional	trash
Issue	Text (single line)	Optional	trash
Resolved?	Boolean	Optional	trash

+ Add field to Previous issues at this location

+ Add field

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 further embedded **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 of things, 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 to the **Previous issues at this location** fields.

Previous issues at this location

(+ Add item) (Delete)

	Date	Issue	Resolved?
1	10/19/2020	Pothole	<input checked="" type="checkbox"/> Resolved?
2	10/30/2020	Pothole	<input type="checkbox"/> Resolved?
3	11/13/2020	Road still not repaved	<input type="checkbox"/> Resolved?

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

New Service Request

Report problem Identify location **Identify submitter** Request updates

Submitter information

Address

First Name

Last Name

Phone

Cancel Back Continue

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:

Task 1: Log in and enable branch development

Task 2: Create the Request Status Data 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

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

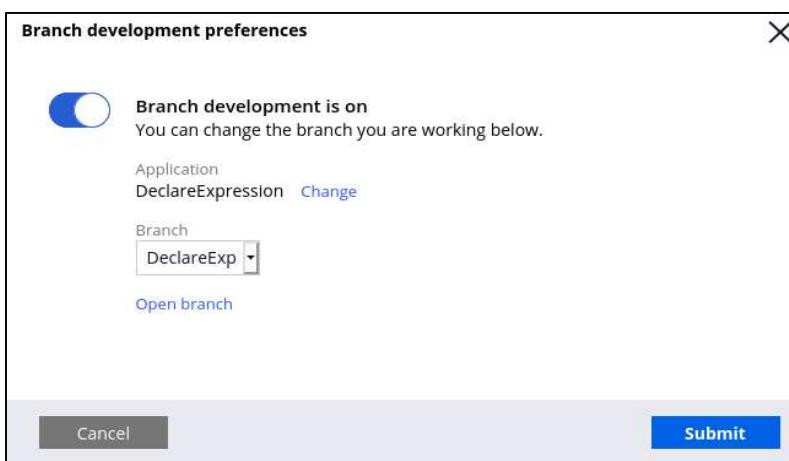
1. Log in and use the credentials **AdminDeclareExp@auto** and rules. You are logged into Dev Studio.
2. From the title bar click the **Toggle branch development** button.



The following appears:

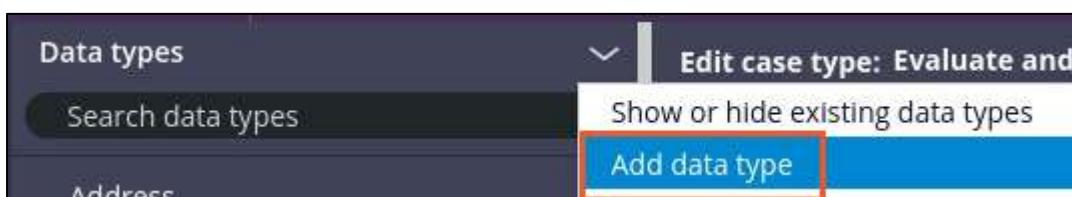


3. Move the slider to turn branch development on.
4. From the **Branch** dropdown menu, ensure that **DeclareExp** is selected and click **Submit**.



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**.

Add Data Type

New Data Type Existing Data Type

Label *
Selling History Details

Description *
Selling History Details

Advanced

Cancel **Submit**

You will see the following:

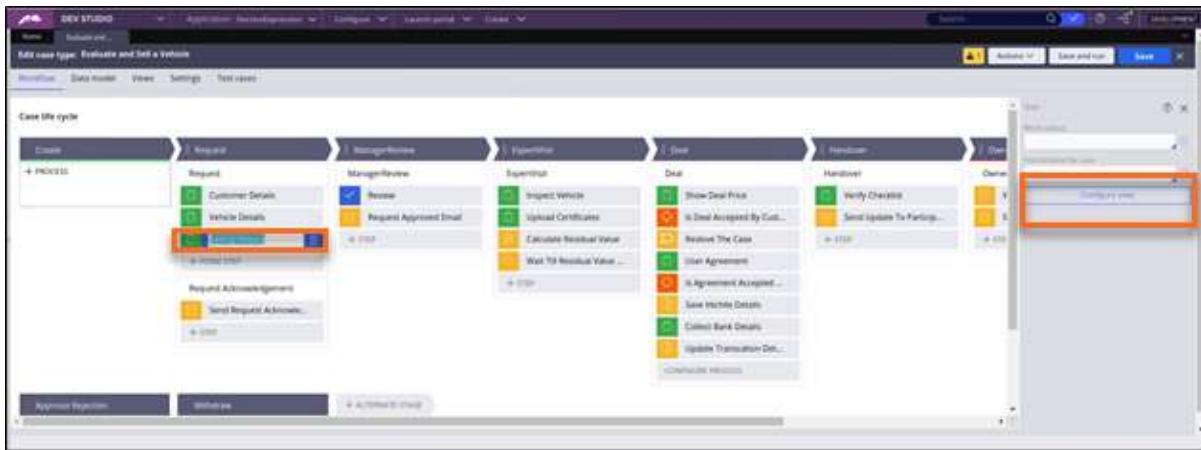
The screenshot shows the Pega Data Types interface. On the left, there's a sidebar with 'Data types' and a search bar. Below it are categories like Address, Bank Details, BCSWallet, Implementation Data Class, OwnerDetails, and Vehicle Details. Under 'OwnerDetails', 'Selling History Details' is highlighted with an orange border. The main panel shows the details for 'Selling History Details'. It includes tabs for Home, Selling Hist..., Data model (which is selected), Usage, Sources, Records, Views, Test cases, and Settings. The Data model tab has a search bar, a checkbox for 'Show system fields', and buttons for 'View data model' and 'Add field'. A table below lists fields: Name, ID, Type, Options, and Application Layer. The table shows one entry: 'No results'.

Task 2: Create the Request Status Data Type

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

The screenshot shows the Pega Dev Studio interface. The left sidebar has sections for Case types, Case types (with 'Evaluate and Sell a Vehicle' selected), Data types, App, Records, and Favorites. The main panel shows the 'Edit case type: Evaluate and Sell a Vehicle' screen. It displays a 'Workflow' section with stages: Create, Request, ManagerReview, ExpertVisit, Deal, and Handover. Each stage has associated steps. For example, the 'Request' stage has 'Customer Details' and 'Vehicle Details' steps. The 'ManagerReview' stage has 'Review' and 'Request Approved Email' steps. The 'Deal' stage has 'Inspect Vehicle', 'Upload Certificates', 'Calculate Residual Value', and 'Wait Till Residual Value ...' steps. The 'Handover' stage has 'Show Deal Price', 'Is Deal Accepted By Cust...', 'Resolve The Case', 'User Agreement', 'Is Agreement Accepted ...', 'Save Vechile Details', 'Collect Bank Details', and 'Update Transaction Det...' steps. There are also buttons for 'Approval Rejection' and 'Withdraw' at the bottom.

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:

This screenshot shows the configuration interface for a 'Selling History' view. At the top, there are tabs for 'Fields' (which is selected) and 'Validations'. Below the tabs is a search bar and two dropdown menus: 'Fields' and 'Views'. The main area displays the message 'No fields in the view.' and a blue link '+ Add field'.

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.

Field name *

Type

Data object *

Options

Single record

List of records

[Advanced](#)

[Cancel](#) [Submit & add another](#) [Submit](#)

The following screen appears:

Field	Type	Options
Selling History Details	Data relationship (list)	Optional
Enter field here ...	Text (single line)	Optional
+ Add field to Selling History Details + Add field		

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

Field	Type	Options
Selling History Details	Data relationship (list)	Optional
Enter field here ...	Text (single line)	Optional
+ Add field to Selling History Details Add new field Add new field Add existing field		

The screen below appears:

Enter field here

Field name

+ Add field to S

+ Add field

Type

Text (single line)

Advanced

Cancel Submit & add another Submit

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.

Field name

Date Of Sale

Type

Date only

Advanced

Cancel Submit & add another Submit

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:

Field	Type	Options	
Selling History Details	Data relationship (list)	Optional	<input type="button" value="Delete"/>
Enter field here ...	Text (single line)	Optional	<input type="button" value="Delete"/>
Date Of Sale	Date only	Optional	<input type="button" value="Delete"/>
Make	Text (single line)	Optional	<input type="button" value="Delete"/>
Model	Text (single line)	Optional	<input type="button" value="Delete"/>
Price	Currency	Optional	<input type="button" value="Delete"/>
+ Add field to Selling History Details + Add field			

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.

Price was successfully added.

Field name *	Total Of Sales
Type	Currency
Advanced	
ID *	TotalOfSales
Description	<input type="text"/>
<input checked="" type="checkbox"/> This is a calculated field (read-only)	
Calculation	
Function	
<input type="button" value="Select..."/>	
<input type="button" value="Cancel"/> <input type="button" value="Submit & add another"/> <input type="button" value="Submit"/>	

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

Field name *

Type

Currency

Advanced

ID *

Description

This is a calculated field (read-only)

Calculation

Function

Sum of

Field

Price

Select...

Selling History Details

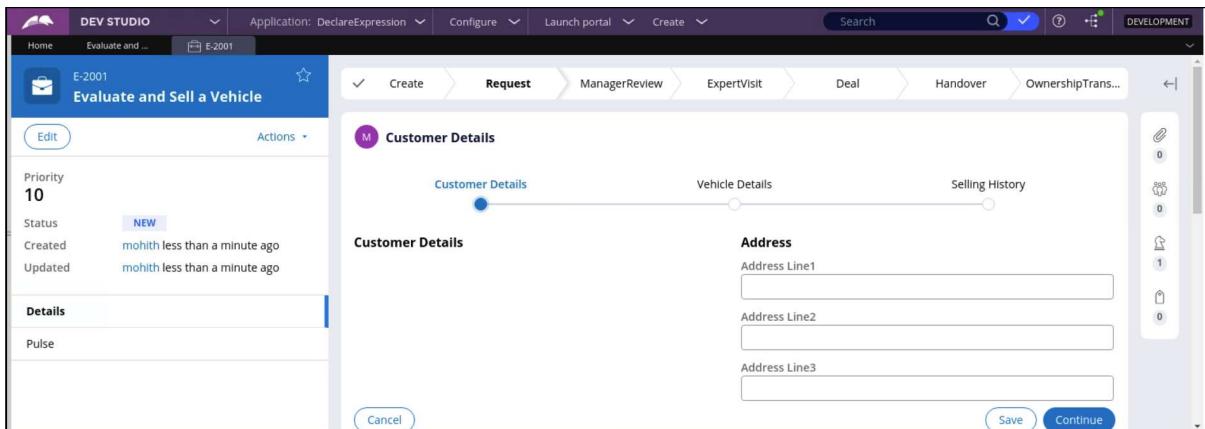
Price

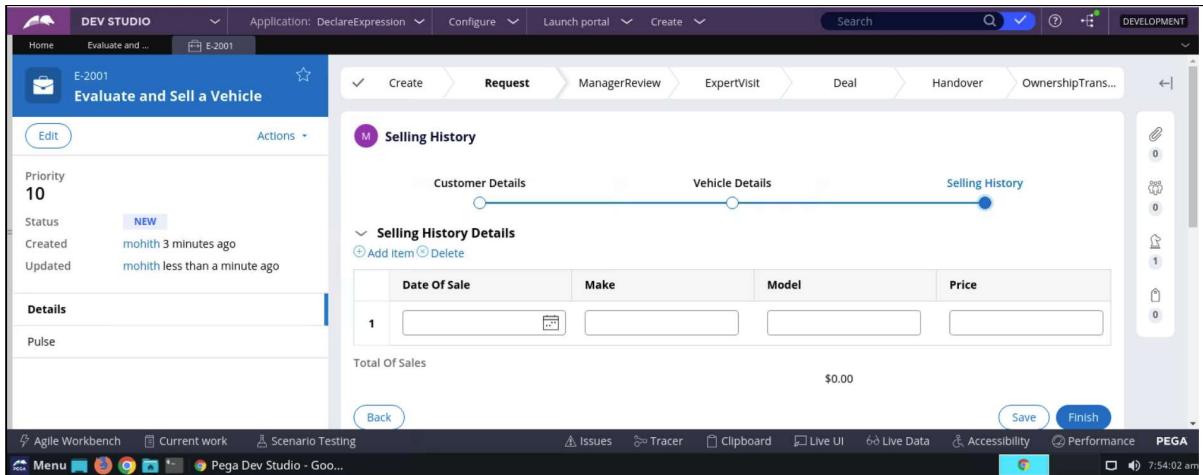
Total Of Sales

Cancel

Submit & add

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.

- Enter a **Date of Sale**, **Make**, **Model**, and **Selling price** on the first line.
- 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.

	Date Of Sale	Make	Model	Price
1	4/14/2021	VW	X1	10000
2	4/15/2021	Audi	X4	200000
3	4/16/2021	BMW	A6	30000

Total Of Sales
\$240,000.00

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

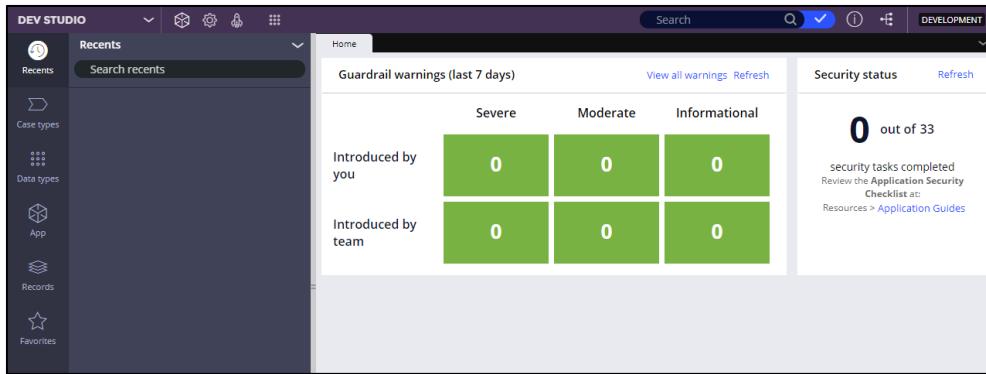
Update the mapped field for the Country data object to add a new field from the external system of record.

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

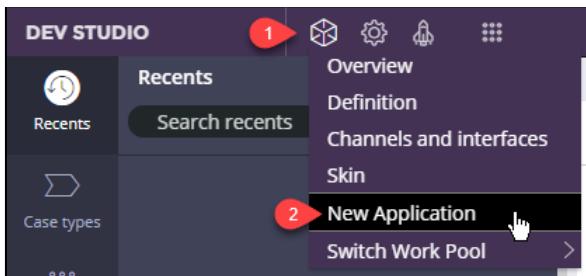
Detailed Steps

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.

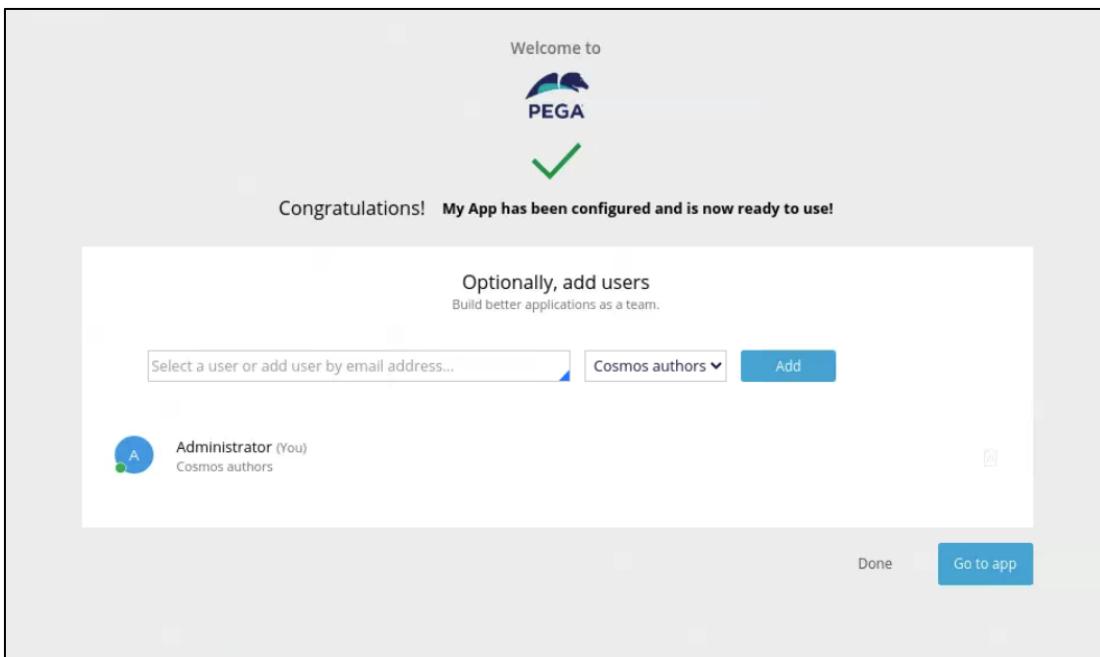


1. Click **Build from scratch** as the type of application to build.
2. Click **Theme Cosmos** as the type of experience for your application
3. Enter **My App** as the name for the application and click the **Create application** button.

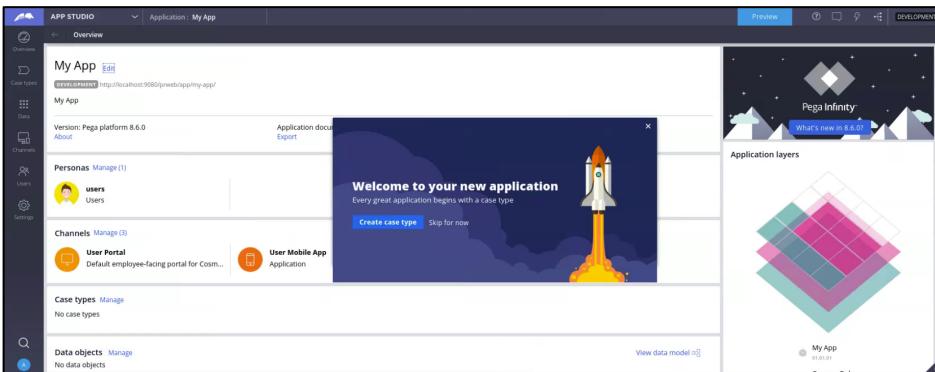
Name your application

Create application

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



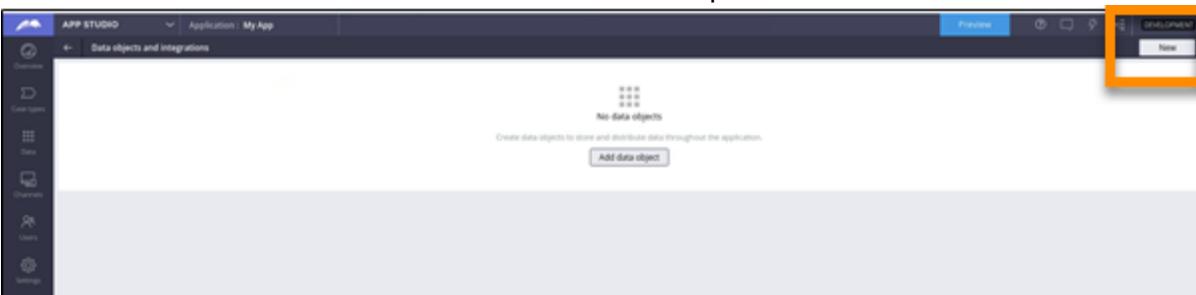
8. You should now be logged into **My App** in App Studio.



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**

The screenshot shows a 'Create data object' dialog box. At the top, there is a 'Data object name' input field containing the text 'Country'. Below it is an 'Advanced' section with a 'Define source data' label and two radio buttons: 'Now' (which is selected) and 'Later'. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'Next' on the right.

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**

Connection details

System

Name *

Icon
 [Change](#)

Description

Connection
 Enter endpoint URL
 Use openAPI

Type Method Endpoint URL *
 REST

Parameters
 Please select the URL parts which you would like to parameterize in future calls

URL part	Parameter name
<input type="checkbox"/> v2	
<input type="checkbox"/> Name	
<input checked="" type="checkbox"/> USA	CountryCode

Headers
Authentication

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

The screenshot shows the 'REST response' mapping interface. It lists fields from a REST response and maps them to a data view. The visible fields are:

- name: "Afghanistan" (Map to name, Text, checked)
- topLevelDomain: (Array Add new)
- alpha2Code: "AF" (String Add new)
- alpha3Code: "AFG" (Map to alpha3Code, Text, checked)
- callingCodes: (Array Add new)
- capital: "Kabul" (String Add new)
- altSpellings: (Array Add new)
- region: "Asia" (Map to region, Text, checked)

At the bottom right is a 'Next' button.

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

The screenshot shows the field mapping interface. The 'Region' field is currently selected and mapped to 'Region' (Text, checked). Other options shown include 'Name' and 'Code' (both also mapped to Text and checked).

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

The screenshot shows the 'REST response' mapping interface. It lists fields from a REST response to a data view. The 'Country' data object is expanded, showing its properties: name (String), topLevelDomain (Array), alpha2Code (String), alpha3Code (String), callingCodes (Array), capital (String), altSpellings (Array), region (String), and subregion (String). The 'callingCodes' array is highlighted with a blue background. On the right side, there are buttons for 'Add all', 'Clear all', and 'Edit' operations for each field type (Name, String, Array, Code, Region).

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.

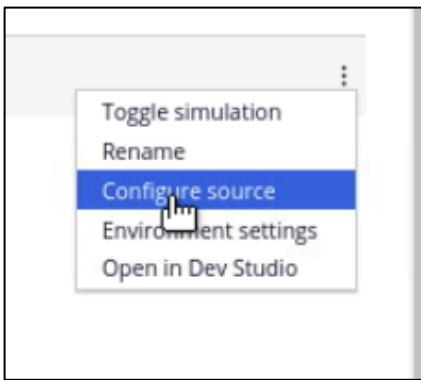
The screenshot shows the 'Data object: Country' page. The 'Data pages' tab is selected. The page displays a table of data pages, each with a name, type, and source. One row is visible: 'List Country' (Type: List (Read), Source: Country_SOR REST). There are also tabs for 'Data model', 'Views', and 'Settings'.

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**.

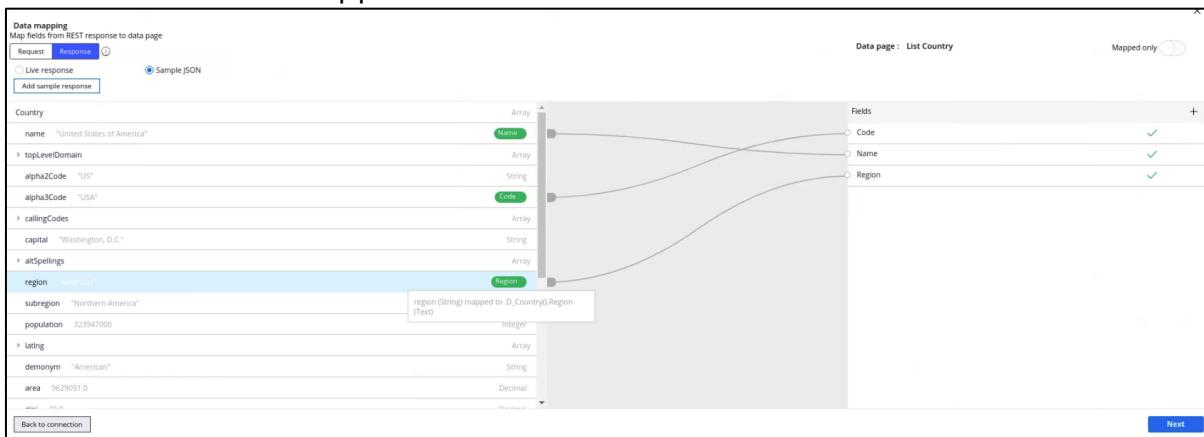
The screenshot shows the 'Data object: Country' page. The 'Data pages' tab is selected. The page displays a table of data pages, each with a name, type, and source. One row is visible: 'List Country' (Type: List (Read), Source: Country_SOR REST). There are also tabs for 'Data model', 'Views', and 'Settings'.

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.

A screenshot of a 'Fields' dialog box. It shows a list of existing fields: 'Code', 'Name', and 'Region'. Below this is a 'Field Name' input field containing 'Flag', a dropdown menu set to 'Text (single line)', and two buttons at the bottom: 'Cancel' and 'OK'. A red arrow points to the '+' icon located at the top right of the dialog box.

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.

The screenshot shows the Data Migrator interface. On the left, the 'REST response' pane displays a JSON structure for the United States. The 'flag' field is highlighted in blue. On the right, the 'Fields' pane shows a mapping configuration. A blue line connects the 'flag' field in the response to the 'Flag' field in the destination schema. The 'Flag' field is listed under 'Map to: Flag' with a 'Text (single line)' type. Other fields in the destination schema include 'Code', 'Name', and 'Region', each with a green checkmark indicating successful mapping.

8. Verify that the field is mapped correctly.

This screenshot shows the same Data Migrator interface after the mapping has been completed. The 'flag' field in the REST response is now shown with a green 'Flag' button icon next to it, indicating it has been mapped. The mapping configuration on the right shows the 'Flag' field in the destination schema with a blue line connecting it to the original 'flag' field in the response. All other fields ('Code', 'Name', 'Region') also have blue lines and green checkmarks, confirming they are all 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.

The screenshot shows the Data model tab for the 'Country' object. The table lists four properties: 'Code' (Type: Text (single line)), 'Flag' (Type: Flag), 'Name' (Type: Name), and 'Region' (Type: Region). The 'Flag' property is highlighted in blue, indicating it is the current selection. The 'Application Layer' column shows 'My App' for all properties.

Name	ID	Type	Options	Application Layer
Code	Code	Text (single line)		My App
Flag	Flag	Text (single line)		My App
Name	Name	Text (single line)		My App
Region	Region	Text (single line)		My App

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

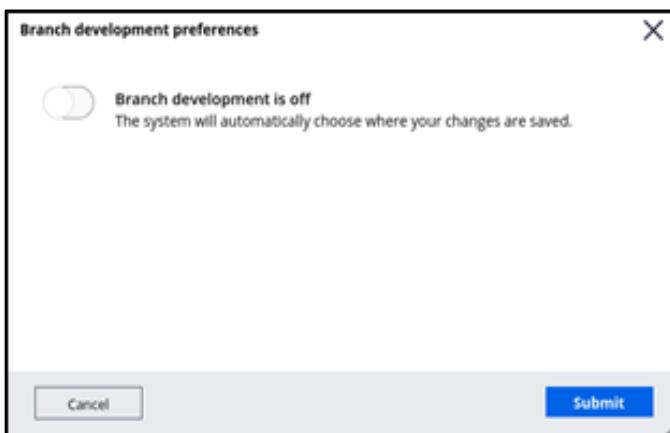
Task 1: Login and enable branch development

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

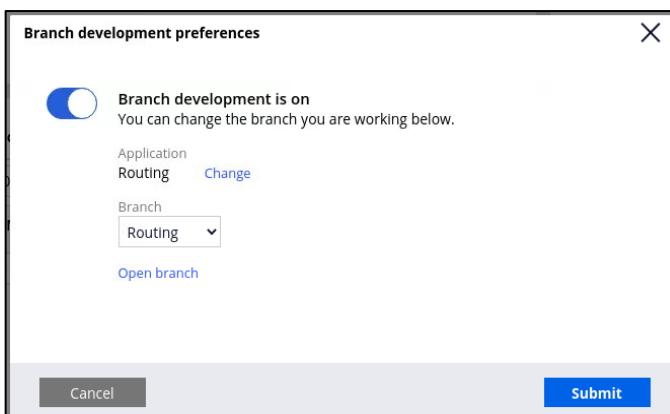
- From the title bar, click the **Toggle branch development** button.



- The following appears.

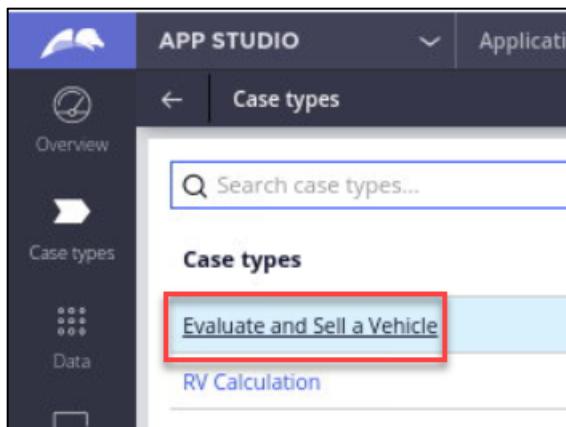


- Move the slider to turn **Branch development** on. From the **Branch** dropdown, ensure that **Routing** is selected and click **Submit**.



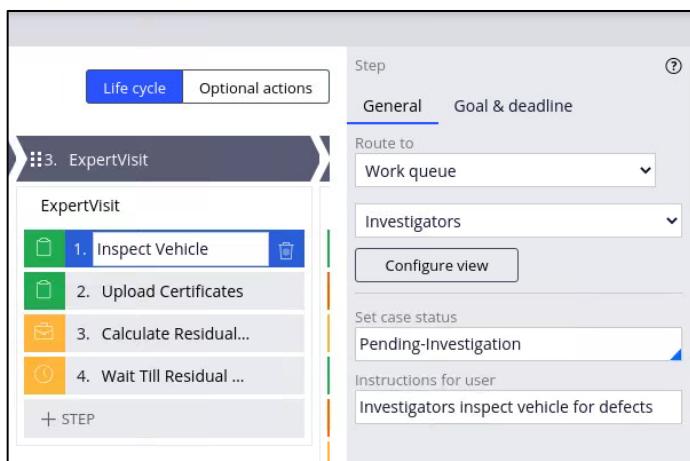
Task 2: Add routing to Inspect Vehicle step

- 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.

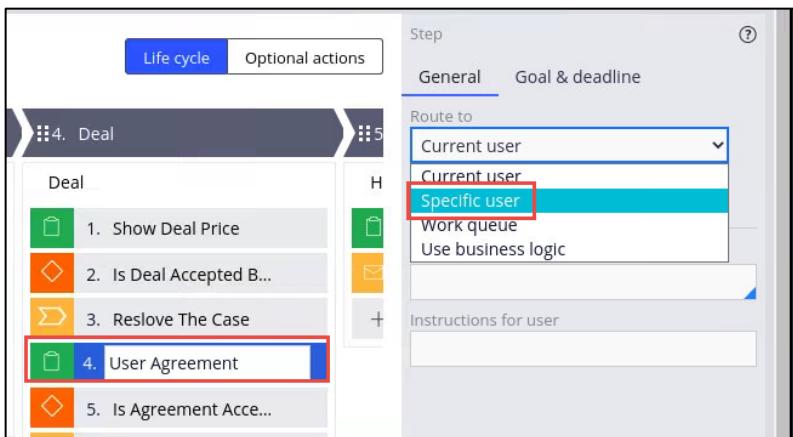
 - a. Route to **Work queue > Investigators**
 - b. Set case status to **Pending-Investigation**
 - c. Set Instructions for the user to "**Investigators inspect vehicle for defects.**"



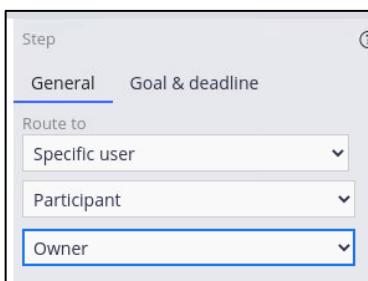
3. Click **Save**.

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**.



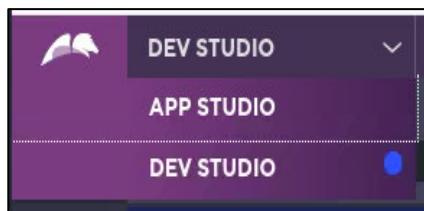
2. Select **Participant** from the drop-down field that appears below. Choose **Owner** from the field that appears below.



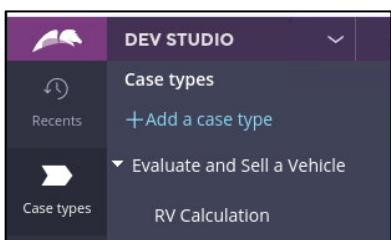
3. Click **Save**.

Task 4: Routing Review

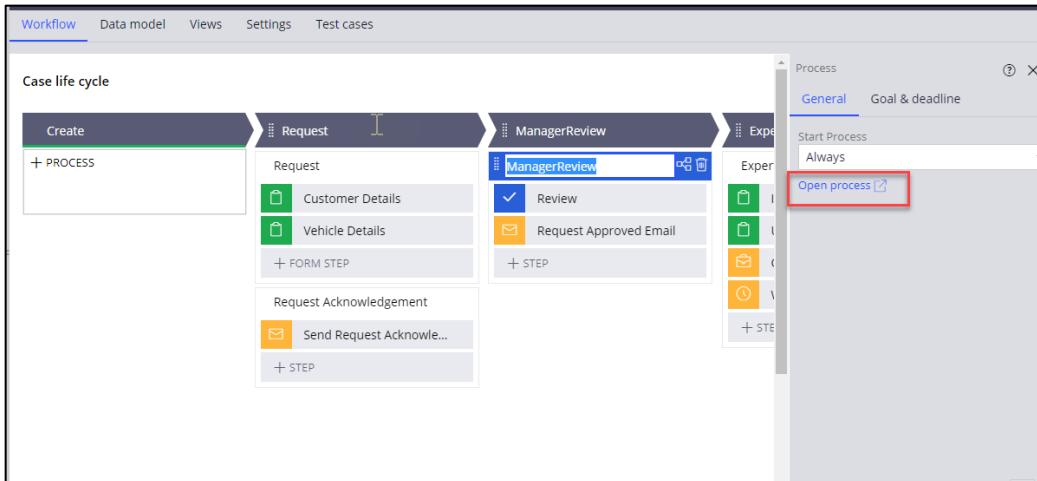
1. Switch to **Dev Studio**.



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

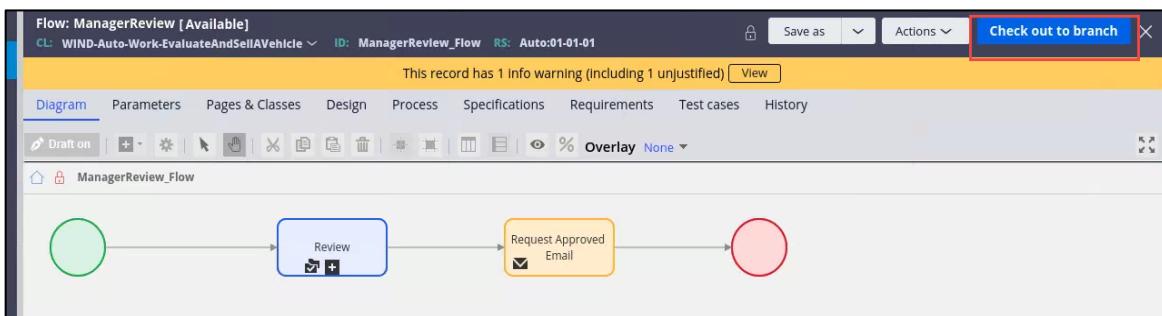


3. Select the ManagerReview Process and click on the Open process link.

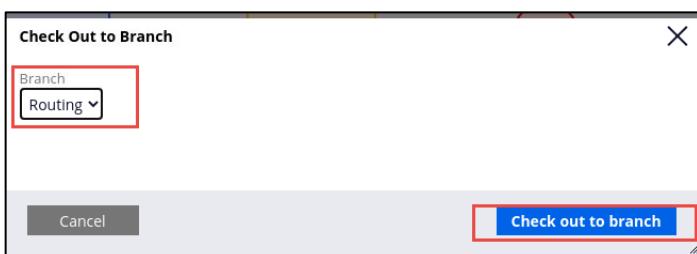


IMPORTANT: You will modify the Review flow shape to have access to all the available work queues in the system. Currently, Joe only has access to the work queues associated with his team or workgroup. For design, we want to select the Auto:Managers work queue.

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**.

Review

Subprocess: Review

Start a reusable subprocess.

Subprocess details
Define subprocess flow information

Define flow: On current page

Approval flow type: Single level

Single approval configuration

Route to: Work queue → Auto:Managers

If APPROVED then: Continue and

Set status:

Cancel **Submit**

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



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

Check In

Functionality Flow in draft mode

This flow is in draft mode. Draft mode suppresses most errors. However, this flow will not execute in production. Remember to turn off 'Draft Mode' before transitioning into production.

Justification for this informational warning
Add Justification

Maintainability Pega Unit Warning

You should create a test case for this rule to identify any regression issues that might occur when this rule is modified.

Justification for this informational warning
Add Justification

Check-in comments * Set routing to work queue Auto:Managers

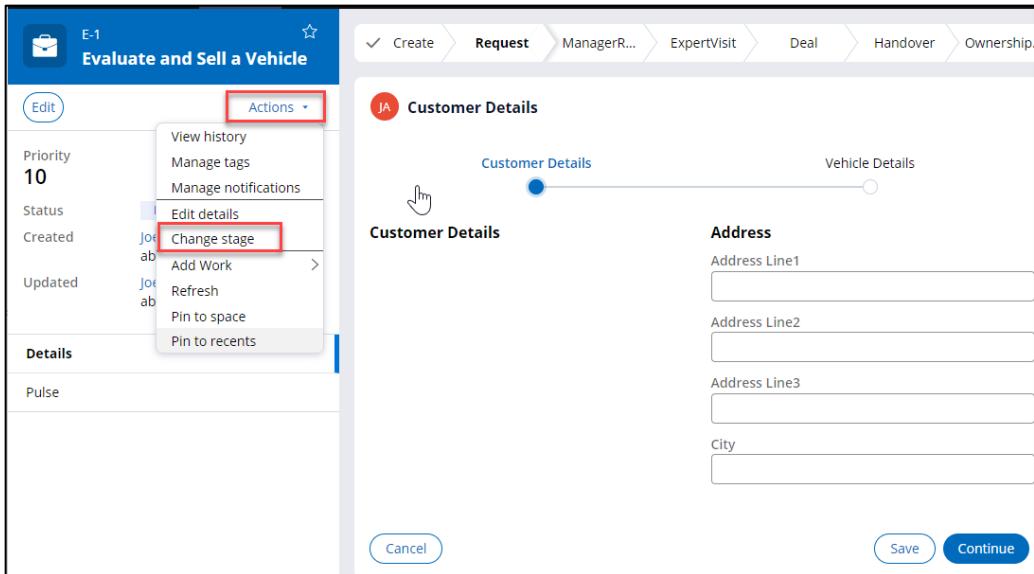
Work item to associate: Select...

Cancel **Check in**

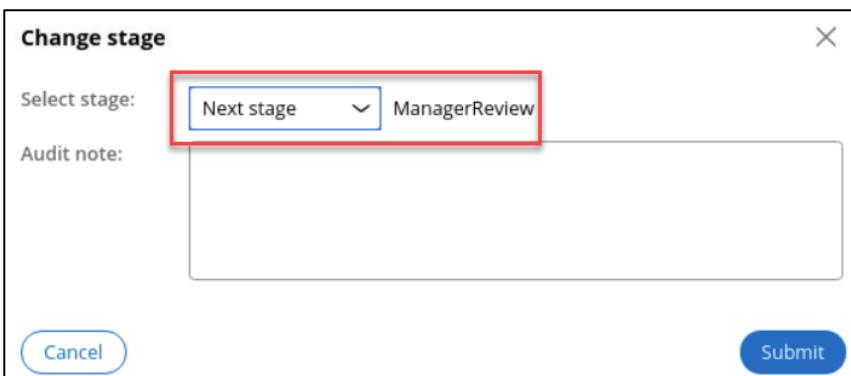
10. Close the flow rule tab by clicking **X**.

Task 5: Verify your work

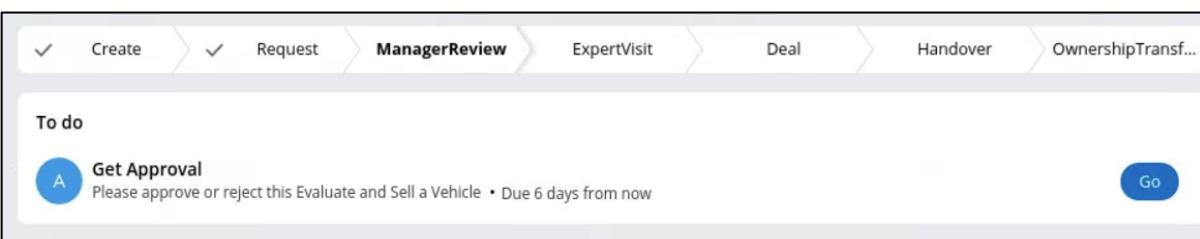
1. On the **Case type**, click **Save and Run**.
2. Click **Action > Change Stage**.



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.

E-2003 Evaluate and Sell a Vehicle

Priority 10

Status NEW

Created Joe Author 1 hour ago

Updated Joe Author 1 hour ago

Details

Pulse

Customer Details

Address

- Address Line1
-
- Address Line2
-
- Address Line3
-
- City
-

Vehicle Details

Vehicle Picture

--

Actions

Cancel

Reject Approve

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.

E-2003 Evaluate and Sell a Vehicle

Priority 10

Status PENDING-INVESTIGATION

Created Joe Author 1 hour ago

Updated Joe Author 9 minutes ago

Details

Pulse

To do

Inspect Ve Investigators

Vehicle Picture

--

Registration Certif

--

Pollution control c

--

Key

Duplicate Key

RC

PUC

Insurance Certifica

User Manual

Invoice

Signed Documents Transfer

Accepted

History

CASE HISTORY CASE NARRATIVE

Time	Description	Performed by
3/30/21 9:13 AM	Assigned to Investigators to 'Investigators inspect vehicles for defects'	Joe Author
3/30/21 9:13 AM	Status changed to Pending-Investigation.	Joe Author
3/30/21 9:13 AM	Case moved from ManagerReview to ExpertVisit via automatic stage transition.	Joe Author
3/30/21 9:13 AM	Correspondence has been attached: Request Approved.	Joe Author
3/30/21 9:13 AM	Assignment to 'Please approve or reject this (1)' completed by performing a 'Evaluate and Sell a Vehicle'.	Joe Author
3/30/21 7:38 AM	Assigned to AutoManagers to 'Please approve or reject this (1)' Evaluate and Sell a Vehicle	Joe Author
3/30/21 7:38 AM	Case moved from Request to ManagerReview via manual stage transition.	Joe Author

Download

Go

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

E-2003 Evaluate and Sell a Vehicle

Priority 10

Status PENDING-INVESTIGATION

Created Joe Author 1 hour ago

Updated Joe Author 21 minutes ago

Details

Pulse

Actions

Change stage

Select stage: Next stage Deal

Audit note:

Actions

Cancel

Save Submit

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

E-2003 Evaluate and Sell a Vehicle

Priority 10

Status PENDING-INVESTIGATION

Actions

Show Deal Price

Actions

Cancel

Save 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.

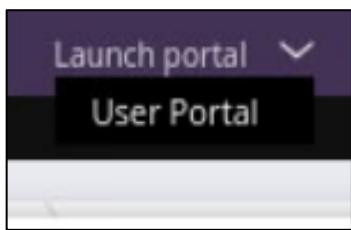
The screenshot shows a Pega case history view for a case titled "Evaluate and Sell a Vehicle". The left sidebar contains fields like Status (PENDING-INVESTIGATION), Created (Joe Author 1 hour ago), and Updated (Joe Author less than a minute ago). A modal window titled "History" is open, showing a table of "CASE HISTORY" entries. The first entry in the table is highlighted with a red box and has the description "Assigned to Joe Author to 'complete task'".

Time	Description	Performed by
3/30/21 9:36 AM	Assigned to Joe Author to 'complete task'	Joe Author
3/30/21 9:36 AM	Assignment to 'complete task' completed by performing a 'Show Deal Price'.	Joe Author
3/30/21 9:35 AM	Assigned to Joe Author to 'complete task'	Joe Author
3/30/21 9:35 AM	Case moved from ExpertVisit to Deal via manual stage transition.	Joe Author
3/30/21 9:35 AM	Performed a 'Change stage'.	Joe Author
3/30/21 9:13 AM	Assigned to Investigators to 'Investigators inspect vehicles for defects'	Joe Author
3/30/21 9:13 AM	Status changed to Pending-Investigation.	Joe Author
3/30/21 9:13 AM	Case moved from ManagerReview to ExpertVisit via False	Joe Author

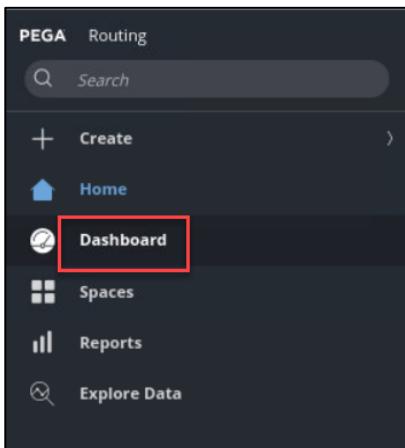
11. Because the case owner is also the same person who created the case, the case was routed to Joe Author.

Task 6: Launch User portal

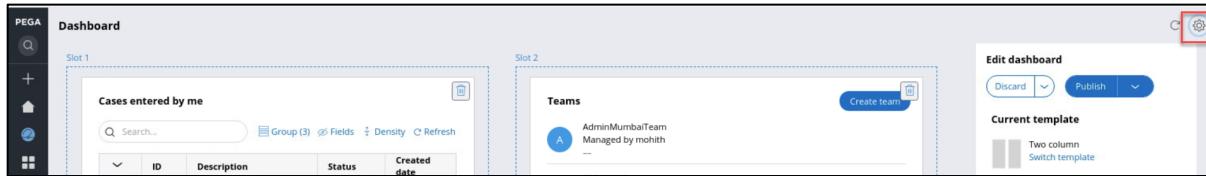
- From Dev Studio, launch the **User portal**.



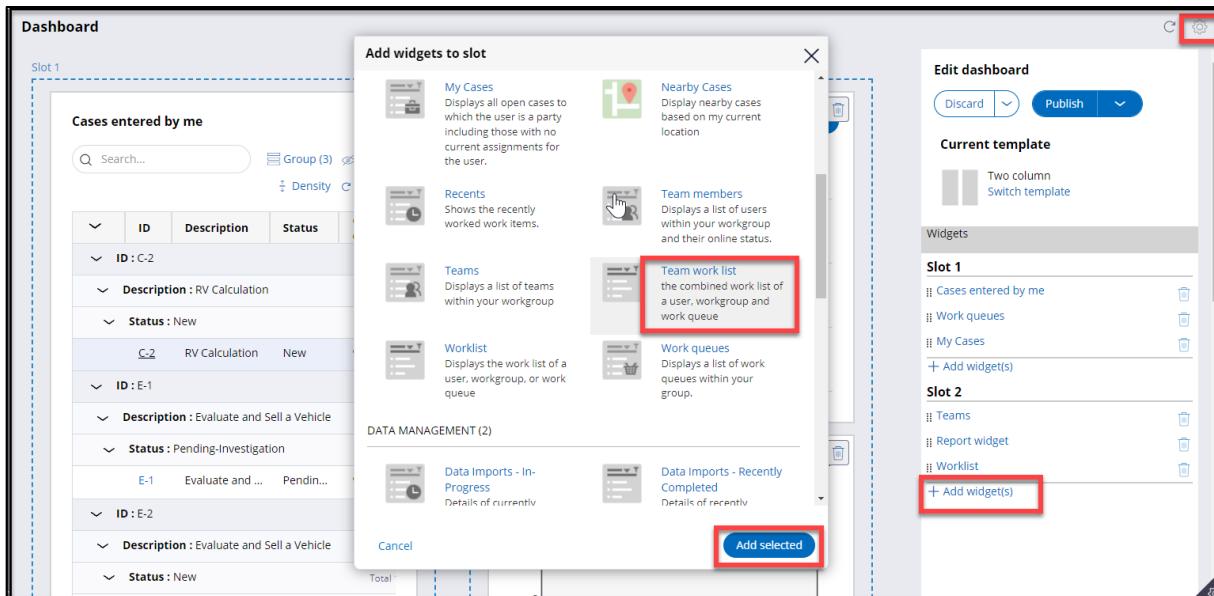
- Click on **Dashboard**.



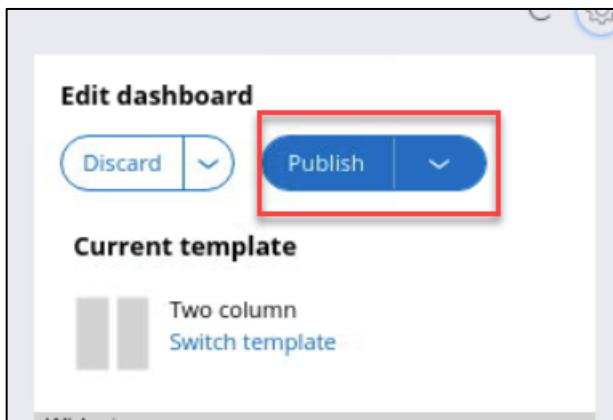
- On the Dashboard, click on **personalize dashboard** icon.



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.

The screenshot shows the Pega Worklist interface. At the top left is a user icon 'JA' and a dropdown menu 'My worklist'. A red box highlights the 'My worklist' dropdown. To its right is a search bar containing the text 'inve'. Below the search bar is a table with columns 'ID', 'Descrip', 'Urgency', and 'Status'. The table contains three rows of data:

ID	Descrip	Urgency	Status
E-3007	Evaluat	10	New
E-2003	Evaluat	10	Pending-Inve...
E-2001	Evaluate and Sell a Vehicle	10	New

Each row has a blue 'Go' button on the right.

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**.

The screenshot shows the PEGA Routing interface. At the top left is the text 'PEGA Routing'. Below it is a search bar with the placeholder 'Search'. On the left, there is a sidebar with a 'Create' section expanded. The 'Evaluate and Sell a Vehicle' option is highlighted with a red box. Other options in the 'Create' section include 'RV Calculation'. Below the sidebar are links for 'Home', 'Dashboard', 'Spaces', 'Reports', and 'Explore Data'.

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

The screenshot shows the 'Evaluate and Sell a Vehicle' application. A new case has been created with the ID E-5. The 'Actions' dropdown menu is open, and the 'Change stage' option is highlighted. A modal window titled 'Change stage' is displayed, showing the 'Select stage:' dropdown set to 'Next stage' and the value 'ExpertVisit'. The 'Submit' button is visible at the bottom right of the modal.

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

The screenshot shows the 'Evaluate and Sell a Vehicle' application. The Case ID 'E-3001' is highlighted with a red box in the top header. The status of the case is listed as 'PENDING-INVESTIGATION'.

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.

The screenshot shows a software application window titled "Investigators". At the top left, there is a circular icon with an orange border and a white center, followed by the text "Investigators" and a dropdown arrow. To the right are buttons for "Group", "Fields", "Density", and "Refresh". The main area is a table with the following columns: "ID", "Description", "Urgency", "Status", and "Action". The table contains 8 rows, each with the ID "E-3001" through "E-3008", a description of "Evaluate and Sell a Vehicle", an urgency of "10", a status of "Pending-Inve...", and a blue button labeled "Go".

ID	Description	Urgency	Status	
E-3001	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3002	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3003	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3004	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3005	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3006	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>
E-3008	Evaluate and Sell a Vehicle	10	Pending-Inve...	<button>Go</button>

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:

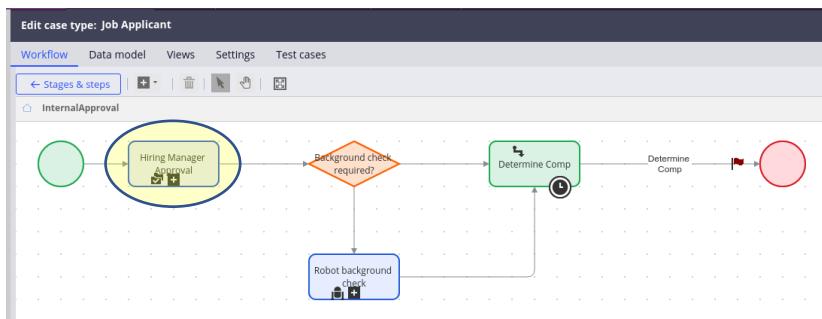
Role	Username	Password
Admin	Admin@approvals	rules

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.



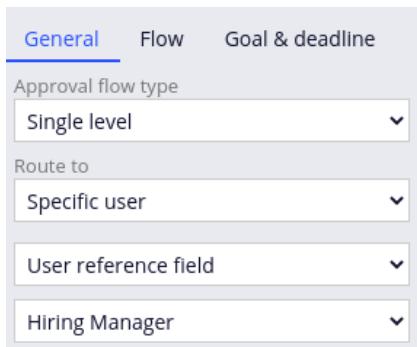
Task 2: Configure the single level approval to be routed to the Hiring Manager

General Flow Goal & deadline

Approval flow type
Single level

Route to
Specific user

User reference field
Hiring Manager



Task 3: Configure the approval flow to resolve case as Resolved-Rejected if rejected by the hiring manager

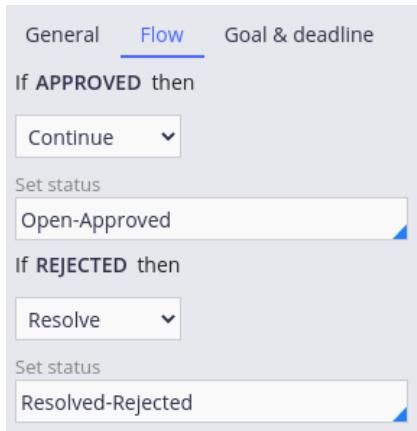
General Flow Goal & deadline

If APPROVED then
Continue

Set status
Open-Approved

If REJECTED then
Resolve

Set status
Resolved-Rejected



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

Hiring Manager Approval Fields

Search Q

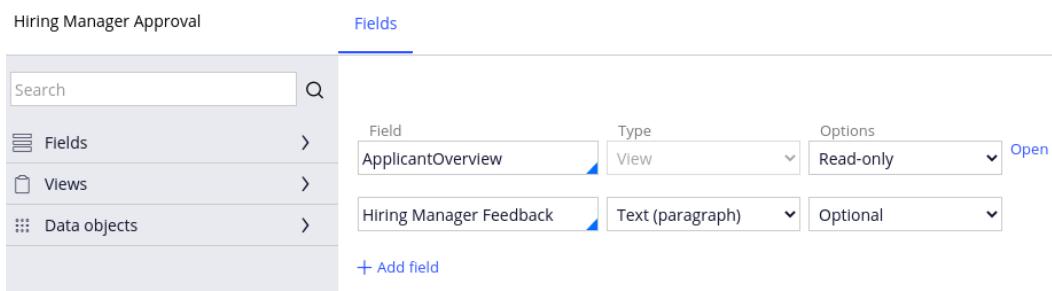
Fields

Views

Data objects

+ Add field

Field	Type	Options
ApplicantOverview	View	Read-only <input type="button" value="Open"/>
Hiring Manager Feedback	Text (paragraph)	Optional <input type="button" value=""/>



Task 5: Test results against Acceptance criteria (see Scenario)

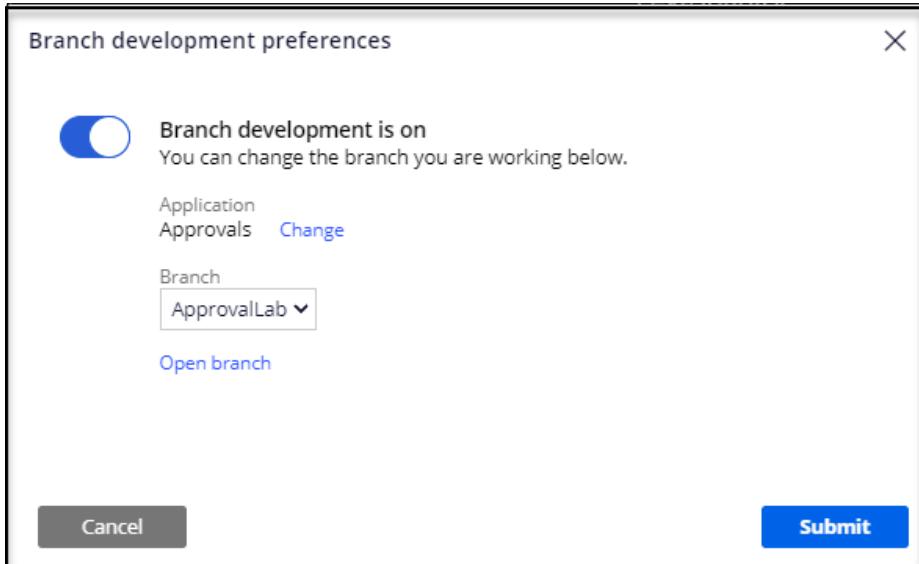
NOTE: Detailed steps to complete your assignment can be found on the pages that follow.

Detailed Steps

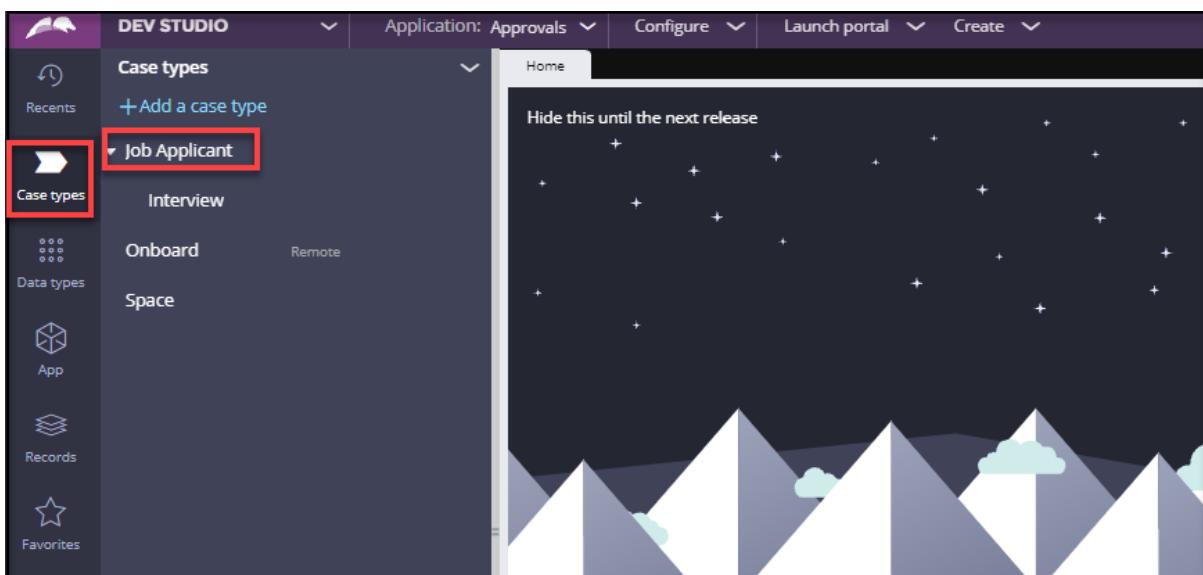
Task 1: Add Approval step to the Internal Approval process

1. Log in using the following credentials: **Admin@approvals** and **rules**.

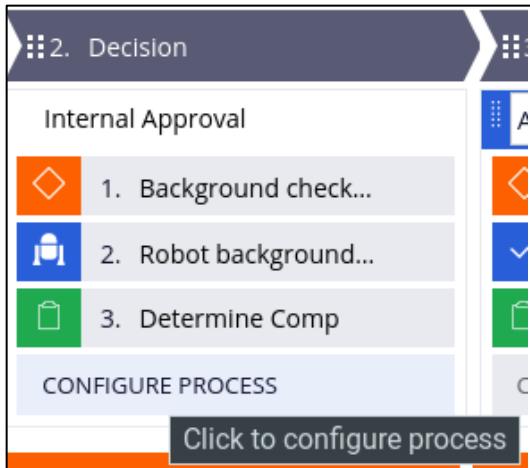
2. Select the Branch Development Icon  and toggle branch Development on.
3. From the **Branch** dropdown ensure that **ApprovalLab** branch is selected and click **Submit**.



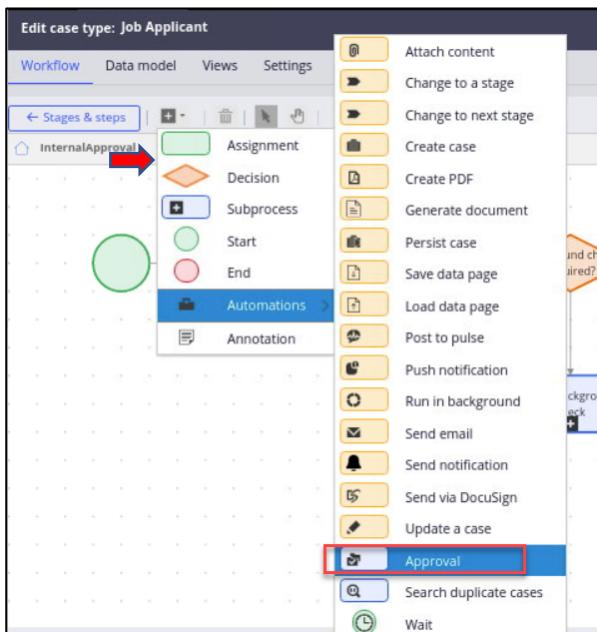
4. Access the Case Type by clicking on **Case types** Explorer.
5. Open the **Job Applicant** case type in the case designer by clicking on the **Case type** name.



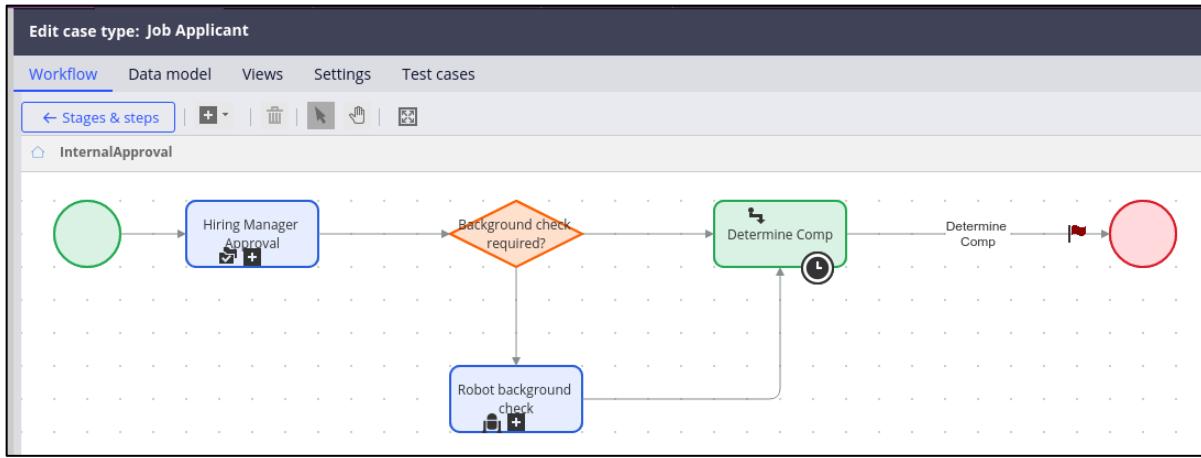
6. Open the **Internal Approval** process in the process configuration designer.



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



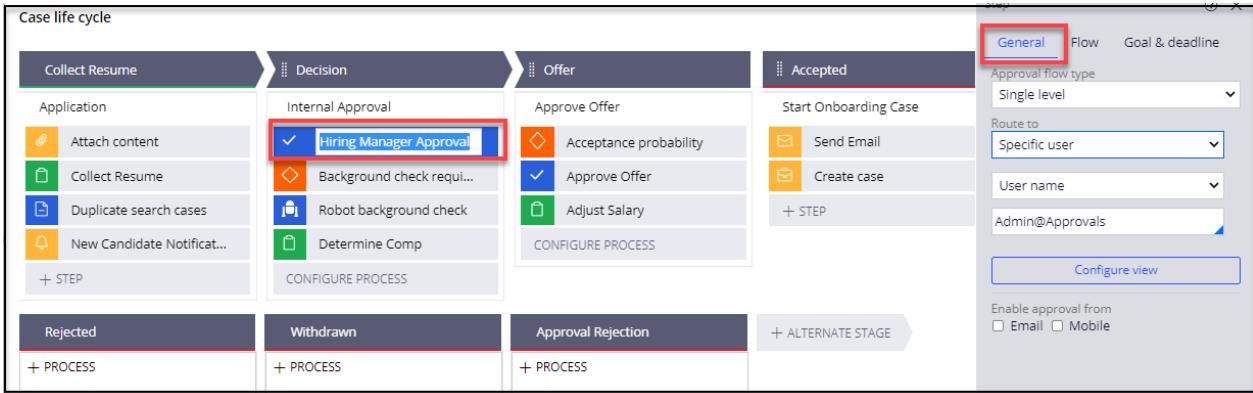
- b. Rename the shape "**Hiring Manager Approval**" by clicking on the current title and editing it.
 - c. Click on **connectors** to drag and drop connection points and connect the shape in the flow as shown below:



- 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:

General	Flow	Goal & deadline
Approval flow type		
Single level		
Route to		
Specific user		
User reference field		
Hiring Manager		

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:

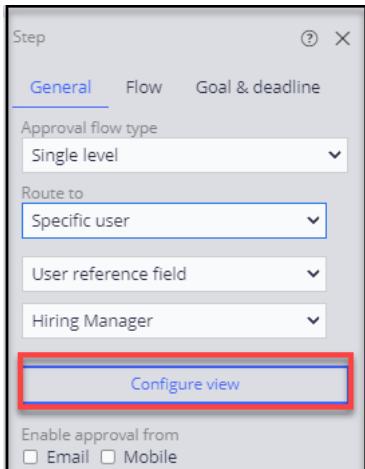
General	Flow	Goal & deadline
If APPROVED then		
Continue		
Set status		
Open-Approved		
If REJECTED then		
Resolve		
Set status		
Resolved-Rejected		

2. Click **Save**.

Task 4: Configure a user view for the approval

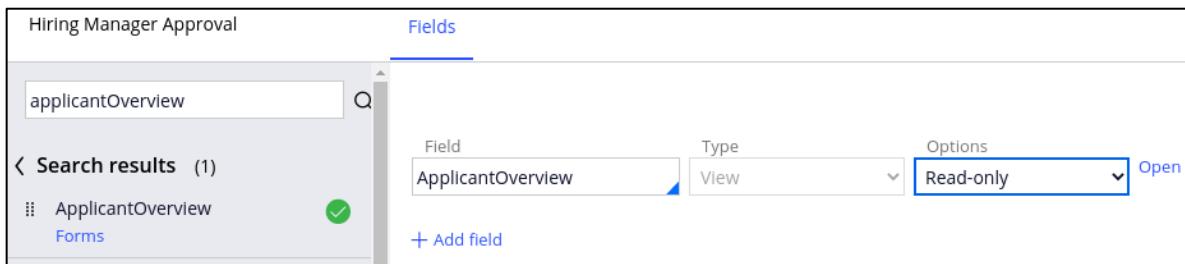
Display the existing Applicant Overview user view as read-only and add a Hiring Manager Feedback field (field does not currently exist) to the view for manager feedback

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.

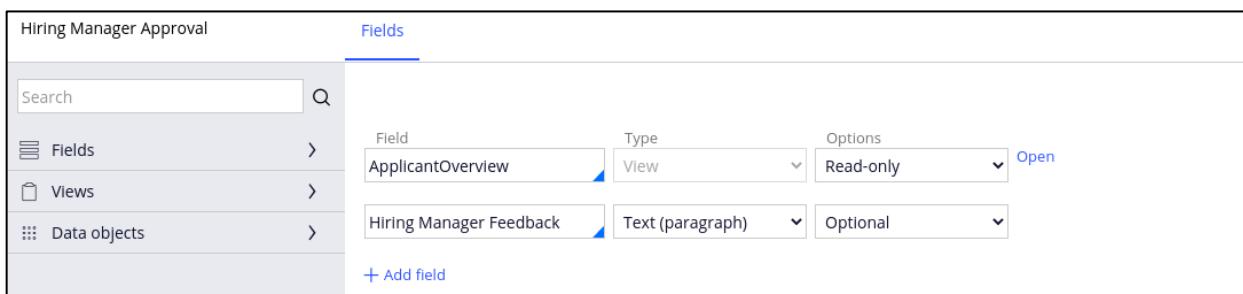
- Enter **ApplicantOverview** in the search box and click the **search icon**.
- From the Search results displayed, click the **+ icon** next to the “**ApplicantOverview**” field to add it to the view. Set options as **Read-only**



4. Add a new field to the case on the view named “**Hiring Manager Feedback**” as type **Text (paragraph)**.

- Click **Add Field**.
- Enter “**Hiring Manager Feedback**” as the field name.

5. Set Type to **Text (paragraph)**.



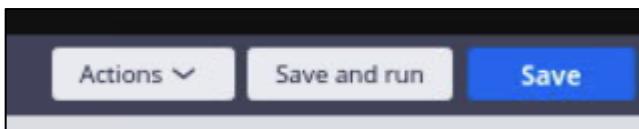
6. Click **Submit**.

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.

The screenshot shows the 'Fields' tab in the Case Designer. On the left, there's a sidebar with a search bar and a list of 'Views'. The 'ApplicantOverview' view is selected, indicated by a green checkmark. The main area displays three fields: 'Notes' (Text (paragraph), Optional), 'ApplicantOverview' (View, Auto, Open), and 'Hiring Manager Feedback' (Text (paragraph), Optional). There are also buttons for 'Add field' and 'Cancel/Submit'.

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**.

The screenshot shows a case detail page for 'Dwight Schrute'. The 'Actions' dropdown menu is open, and the 'View history' option is highlighted with a red box. A green success message at the top right says 'Thank you! The next step in this case has been routed appropriately.' Below the message, there's a 'To do' section with a task titled 'Get Approval' and a personal information section with fields for First Name (Dwight), Last Name (Schrute), Phone (555-123-4567), and Address (Schrute Farm).

4. Confirm that the approval was **Assigned to Jim Halpert** (the hiring manager was automatically set based on the position applied for)

The screenshot shows the 'History' tab of the case history table. The table has columns for Time, Description, Performed by, and Location. One row in the table is highlighted with a red box, showing the assignment to Jim Halpert.

Time	Description	Performed by	Location
4/5/21 3:47 AM	Assigned to Jim Halpert to 'Please approve or reject this {1}' Dwight Schrute	Admin@Approvals	Map it
4/5/21 3:47 AM	Case moved from Collect Resume to Decision via automatic stage transition.	Admin@Approvals	Map it
4/5/21 3:47 AM	No Duplicate Cases Found	Admin@Approvals	Map it
4/5/21 3:47 AM	Assignment to 'complete task' completed by performing a 'Collect Resume'.	Admin@Approvals	Map it
4/5/21 3:46 AM	Assigned to Admin@Approvals to 'complete task'	Admin@Approvals	Map it
4/5/21 3:46 AM	Item created.	Admin@Approvals	Map it

5. Close the history by clicking on the close icon.

History



CASE HISTORY CASE NARRATIVE

6. Click the **Go** button.

J-38015 Dwight Schrute

Priority 10

Actions

Collect Resume > Decision > Offer > Accepted

To do

Get Approval Please approve or reject this Dwight Schrute

Go

7. Confirm that you see the form below (although your data may be different):

Collect Resume > Decision > Offer

Approval Due 9 days from now *

Notes

ApplicantOverview

Applicant Overview

Applicant Information

Full Name
Dwight Schrute

Email
Dwight.Schrute@beets.com

Phone
555-123-4567

Address
Schrute Farms Scranton, PA

Position Information

Title
Account Manager

Department
Sales

Hiring Manager
Jim Halpert

Compensation

8. Click **Approve** and Confirm case has continued to next step and status has changed to Open-Approved.

J-38015 Dwight Schrute

Priority 10

Status OPEN-APPROVED

Created Admin@Approvals 11 minutes ago

Updated Admin@Approvals about a minute ago

Actions

Collect Resume > Decision > Offer > Accepted

To do

Determine Comp Internal Approval (Decision) • Due 1 day from now

Go

Personal Information

First Name Address

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**.

The screenshot shows the Pegasystems Case Management interface. On the left, there is a sidebar with a blue header containing a briefcase icon, the ID 'J-38016', and the name 'Dwight Schrute'. Below this, it shows 'Priority 10', 'Status RESOLVED-REJECTED', and 'Created Admin@Approvals'. To the right, there is a main panel titled 'Personal Information' which displays 'First Name: Dwight' and 'Last Name: Schrute'. At the top of the main panel, there is a navigation bar with three steps: 'Collect Resume', 'Decision', and 'Approval Rejection'. On the far right, there is a map icon with the address 'Schrute Farms, Scranton, PA, United States' and options for 'Map' and 'Satellite' views.

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

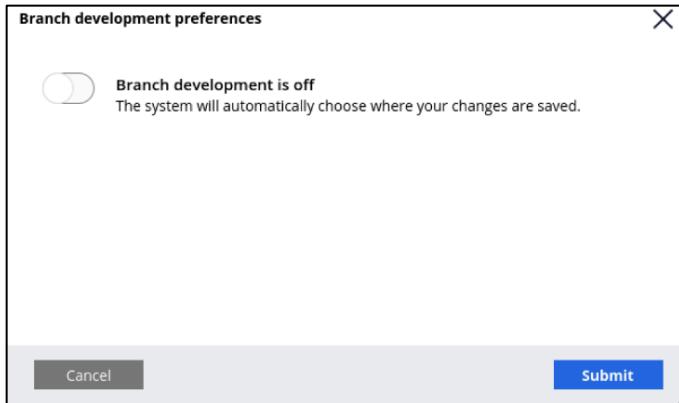
1. Log in to Pega using the username **author@skip** and the password of **rules**.

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.

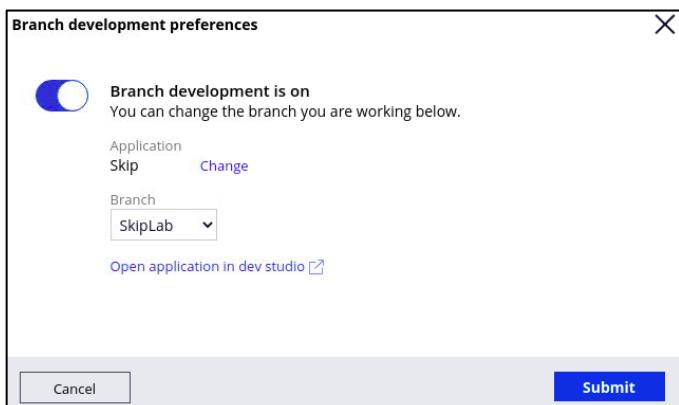
2. Click the Toggle branch development button from the title bar.



3. The following appears:

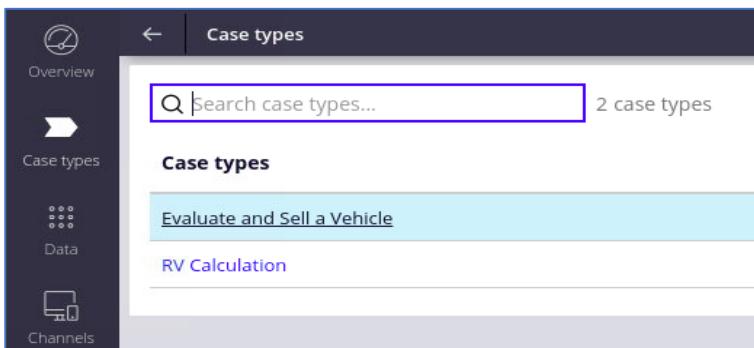


4. Move the slider to turn branch development on. From the Branch dropdown ensure that **SkipLab** is selected and click **Submit button**.

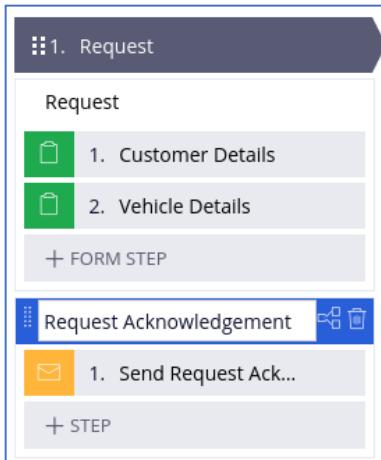


Task 2: Add a condition to skip sending the Request Acknowledgement email

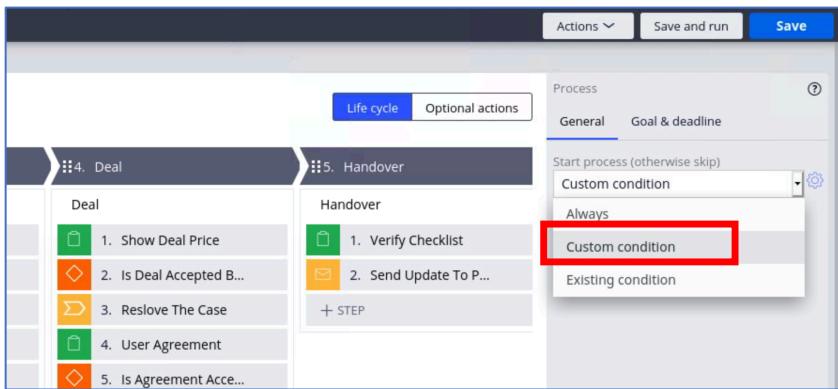
1. Open the Case: **Case Types > Evaluate and sell a vehicle.**



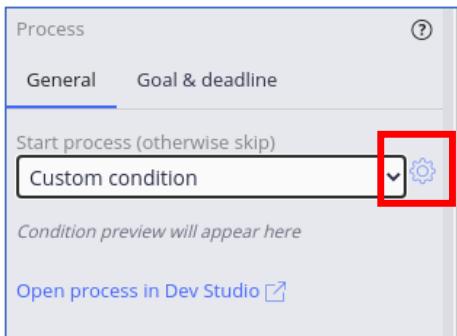
2. Select the process **Request Acknowledgement**.



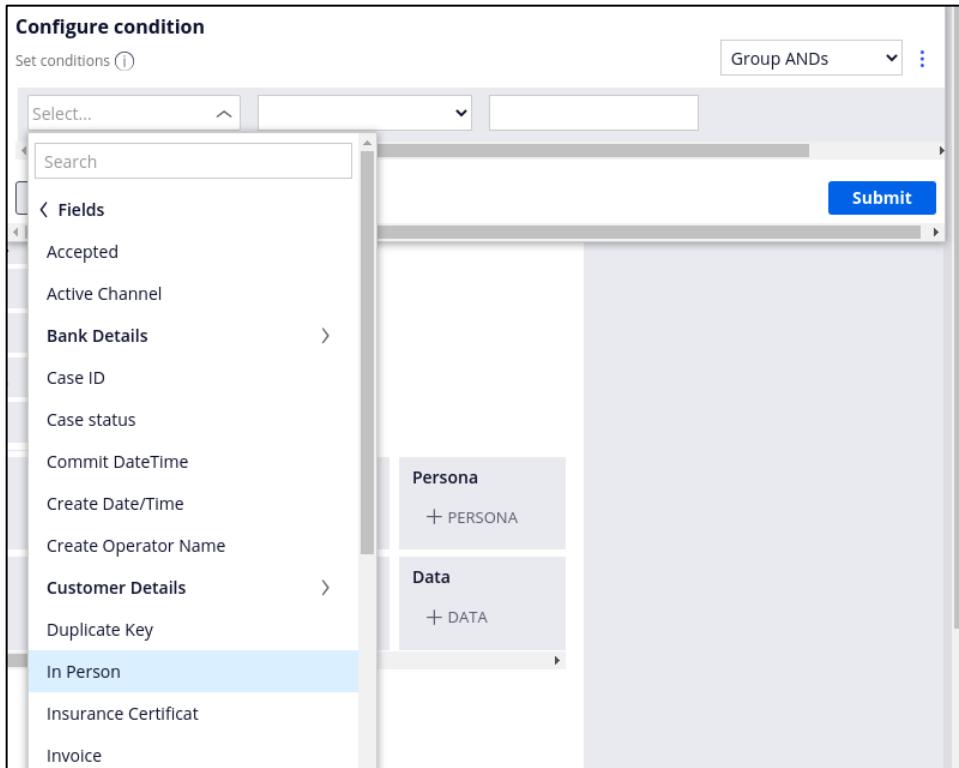
3. In the context menu select **Custom Condition** from the Start process drop-down.



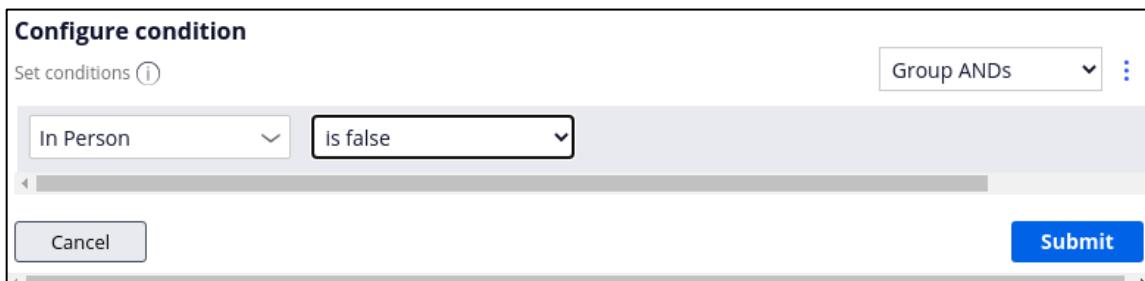
4. Click the gear icon that appears to the right of the drop-down list.



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**.

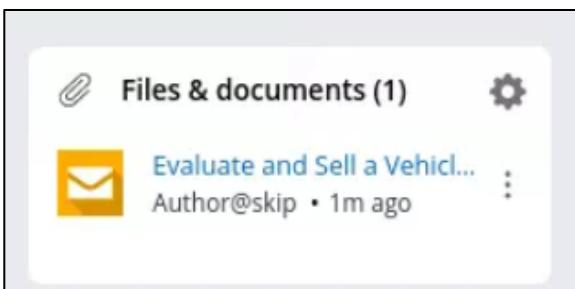
1. Customer Details 2. Vehicle Details

In Person

Address

Address Line1
Address Line2
Address Line3
City

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.

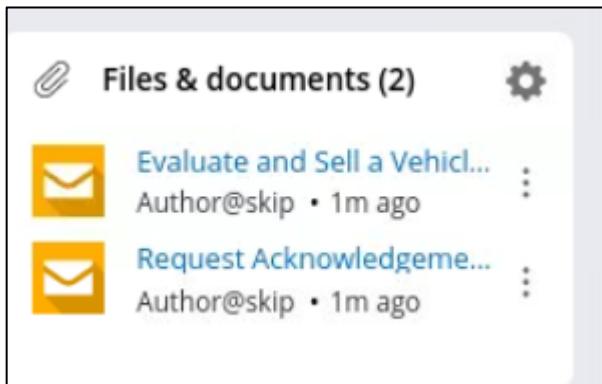
In Person

Address

Address Line1
Address Line2
Address Line3
City

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.



The screenshot shows a list titled "Files & documents (2)". It contains two entries, each with a yellow envelope icon, the file name, the author, and a timestamp. The first entry is "Evaluate and Sell a Vehic..." and the second is "Request Acknowledgeme...". Both entries were created by "Author@skip" one minute ago.

File Name	Author	Created
Evaluate and Sell a Vehic...	Author@skip	1m ago
Request Acknowledgeme...	Author@skip	1m ago

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. Ignore the warning and click **close**.

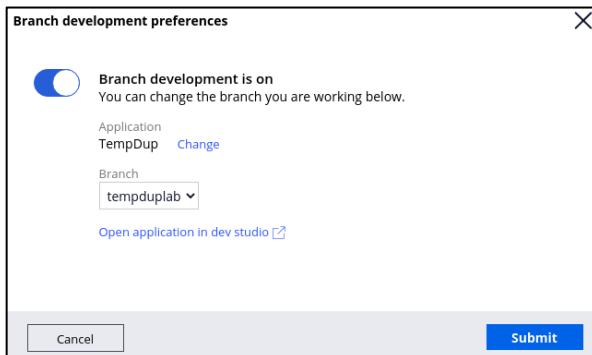
2. From the title bar click the **Toggle branch development** button.



3. Move the slider to turn branch development on.

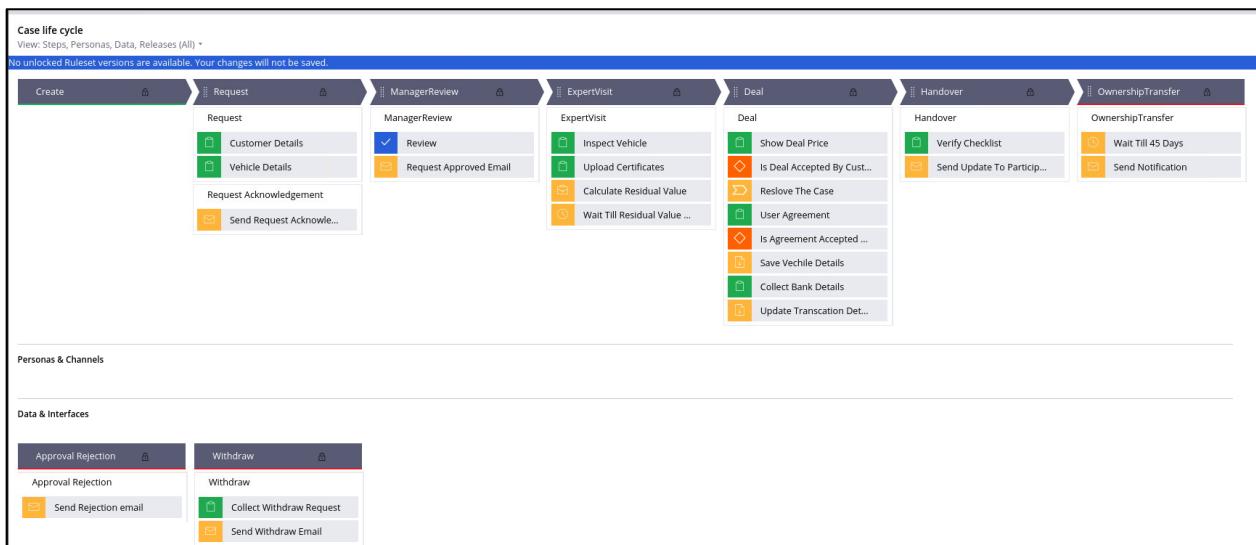


4. The following screen appears. From the **Branch** dropdown ensure that **tempduplicab** is selected and click **Submit**.



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.

Vehicle Details

Fields Validations

Search Q

Fields > Views > Data objects >

Field: Vehicle Picture, Type: Attachment, Options: Optional

+ Add field

Cancel Submit

This screenshot shows the 'Vehicle Details' configuration interface. On the left, there's a sidebar with 'Fields', 'Views', and 'Data objects'. The main area shows a single field named 'Vehicle Picture' with its type set to 'Attachment' and 'Optional' as an option. There are buttons for adding more fields and for canceling or submitting changes.

4. Expand **Fields** (on the left side of the window) and locate **Vehicle Details**.

Vehicle Details

Fields Validations

Search Q

Fields > Signed Documents for RC Transfer > test > Update Date/Time > Update Operator Name > Urgency > User Agreement > User Manual > Vehicle Details > Vehicle Picture > Withdraw Reason

+ Add field

Cancel Submit

This screenshot shows the same configuration interface as above, but with the 'Fields' section expanded. The 'Vehicle Details' folder is highlighted with a red box. Inside, 'Vehicle Picture' is listed with a green checkmark next to it, indicating it has been selected. The other items in the list are 'Signed Documents for RC Transfer', 'test', 'Update Date/Time', 'Update Operator Name', 'Urgency', 'User Agreement', 'User Manual', and 'Withdraw Reason'.

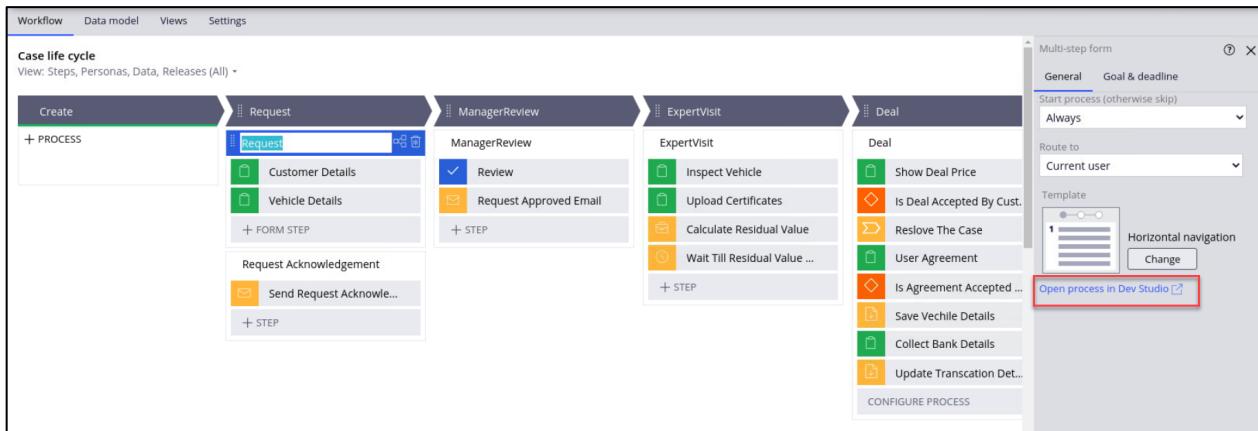
5. Hover over **Vehicle Details** and click the + symbol to add the field to the view.

The screenshot shows the 'Fields' section of the Case Type configuration. A search bar at the top left is empty. Below it, a list of fields is shown on the left, with 'Vehicle Picture' and 'Vehicle Details' selected and moved to the right. The right side displays the field details: 'Field' (Vehicle Picture), 'Type' (Attachment), 'Options' (Optional), and a preview of 'Vehicle Details'. Buttons for 'View', 'Create new view...', and 'Open' are present. A 'Cancel' button is at the bottom left, and a 'Submit' button is at the bottom right.

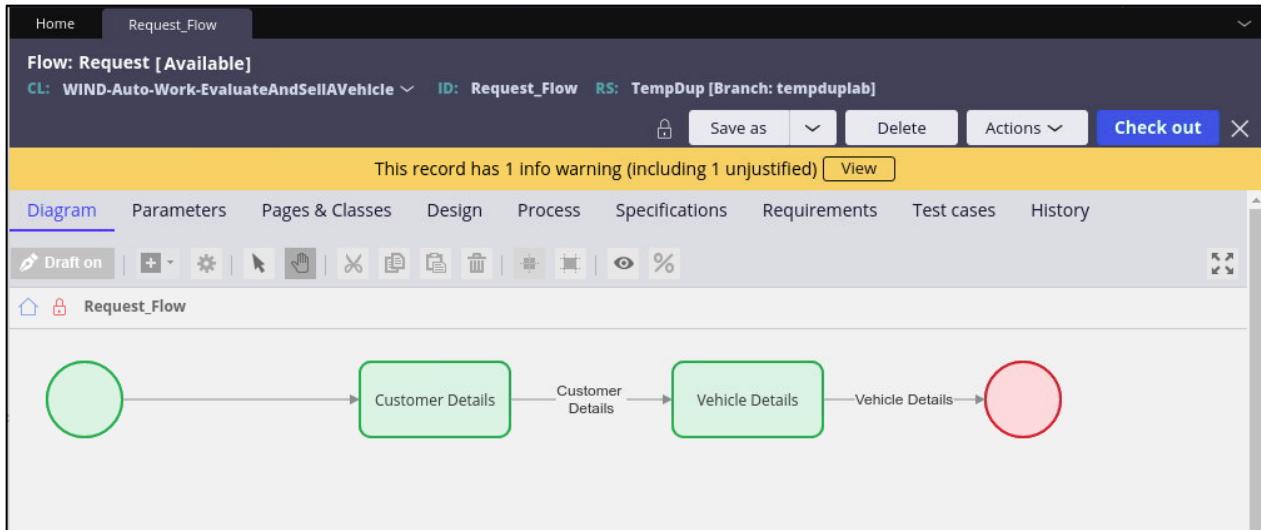
6. Click **Submit**.
7. Click **Save** to save the changes to the case type.

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.

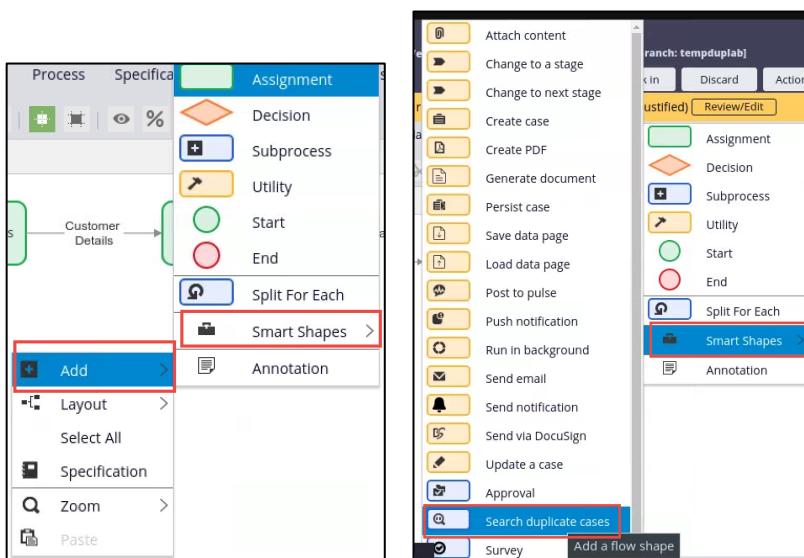


9. The flow rule will open on a separate tab. The flow rule is locked for editing. Click **Check out**.

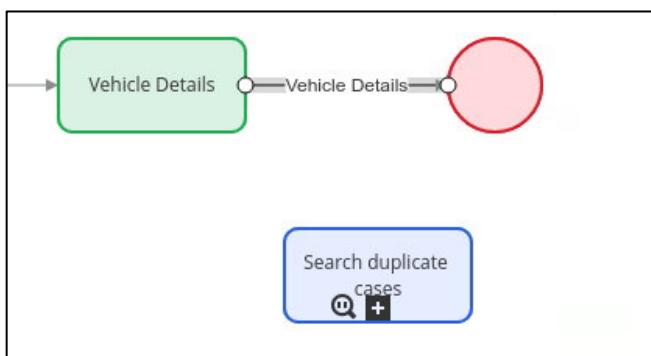


10. Add a Duplicate Smart Shape to the process.

- Right-click in the pallet, **Add a Search duplicate cases** shape to the process.

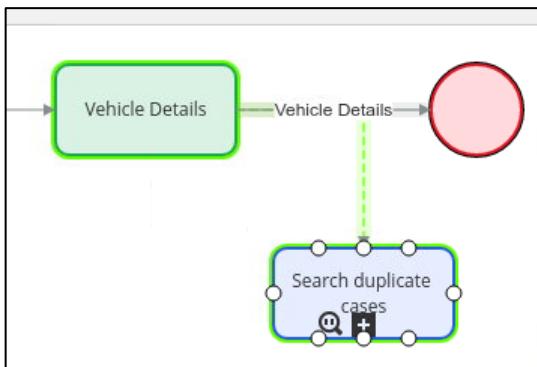


- Reuse the existing connector **Vehicle Details**. Select the connector to activate it.

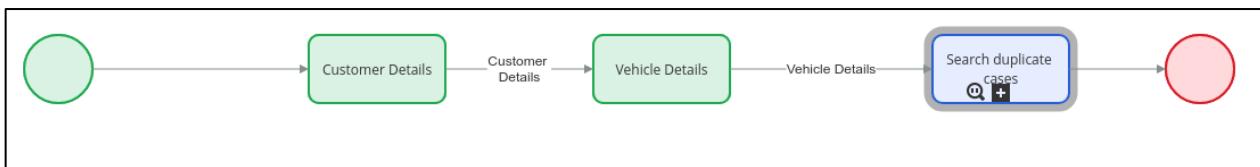


- c. Click on the handle, the white circle at the connector arrow, and drag it to the middle of the Search duplicate cases shape. *Make sure that both of the shapes and connector are glowing green before you release the connector.*

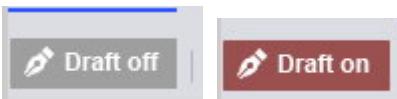
NOTE: Glowing green means the connector has been locked to the shape.



- 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**.

Check In

Functionality Flow in draft mode

This flow is in draft mode. Draft mode suppresses most errors. However, this flow will not execute in production. Remember to turn off 'Draft Mode' before transitioning into production.

Justification for this informational warning
Add justification

Maintainability Pega Unit Warning

You should create a test case for this rule to identify any regression issues that might occur when this rule is modified.

Justification for this informational warning
Add justification

Check-in comments *
Added duplicate search shape to the multi-form|

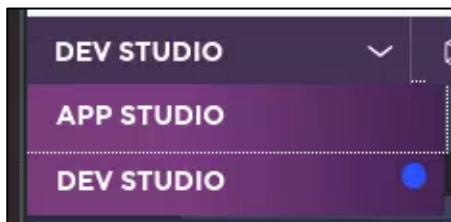
work item to associate
Select...

Cancel **Check in**

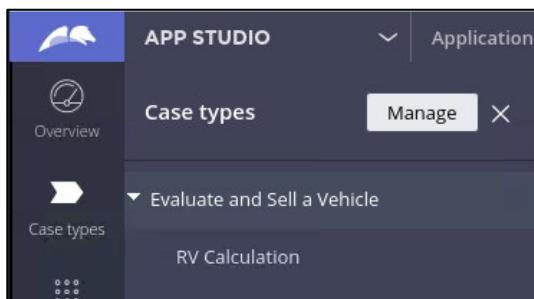
15. Close the flow by clicking X.



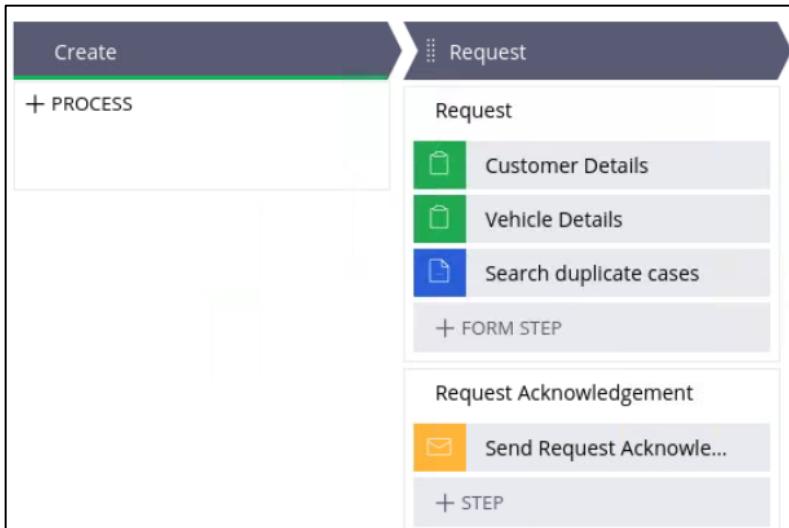
16. Switch back to **App Studio**.



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.

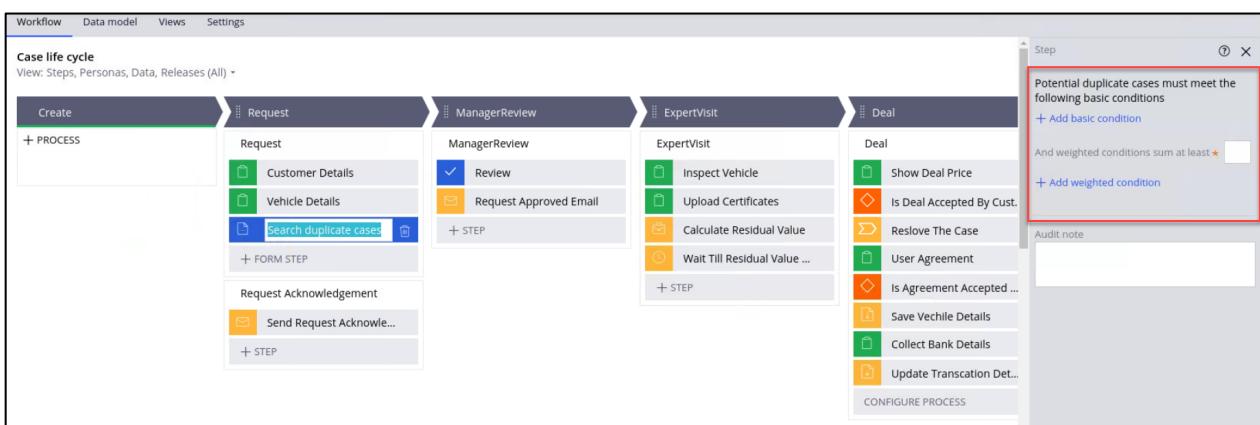


18. The **Search duplicate cases** shape will now appear in the Request stage.



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.)

When Potential duplicate Current case +

Make	Comparator is same
------	-----------------------

OK

23. Using the + symbol repeat step 21 to add **Vehicle Details > Model** and **Vehicle Details > Registration Number** to the basic condition as follows.

When Potential duplicate Current case +

Make	Comparator is same
------	-----------------------

and Potential duplicate Current case +

Model	Comparator is same
-------	-----------------------

and Potential duplicate Current case +

Registration Number	Comparator is same
---------------------	-----------------------

OK

24. Click **OK**. The following appears for the step basic conditions.

Step

Potential duplicate cases must meet the following basic conditions

When
Make is same AND Model is same AND Registration...

And weighted conditions sum at least *

+ Add weighted condition

25. Enter 50 into **And weighted condition sum at least** field.

Step ?

Potential duplicate cases must meet the following basic conditions

When
Make is same AND Model is same AND Registration...

And weighted conditions sum at least ★ 50

[+ Add weighted condition](#)

26. Click **+ Add weighted condition**. The following appears.

Weight (0-100)

Potential duplicate Please select a field.. Comparator Current case

OK

27. Enter 25 for Weight and select **is equal to** as the Comparator. Potential Duplicate as **Vehicle Details > TypeOfVehicle**.

Weight (0-100)

Potential duplicate TypeOfVehicle Comparator is equal to Current case Select values

OK

28. In the **Current case** field, enter "Four Wheeler".

Weight (0-100)

Potential duplicate TypeOfVehicle Comparator is equal to Current case "Four Wheeler" [Select values](#)

OK

29. Click **Submit** then **OK** to add the weighted condition.

Step ?

Potential duplicate cases must meet the following basic conditions

When Delete
Make is same AND Model is same AND Registration...

And weighted conditions sum at least * 50

When Delete
25
TypeOfVehicle is equal to "Four Wheeler"

+ Add weighted condition

30. Repeat steps 25 to 27 to add a second weighted condition with the following settings.

Weight (0-100)
25

Potential duplicate Comparator Current case
Fuel Type is equal to "Petrol" Select values

OK

Field	Enter value
31.	Weight
32.	Potential duplicate
33.	Comparator
34.	Current case

35. The following will now appear:

Step ?

Potential duplicate cases must meet the following basic conditions

When
Make is same AND Model is same AND Registration... Delete

And weighted conditions sum at least * 50

When
TypeOfVehicle is equal to "Four Wheeler" 25 Delete

When
Fuel Type is equal to "Petrol" 25 Delete

+ Add weighted condition

This screenshot shows the configuration of a 'Duplicate search step' in Dev Studio. It includes a note about basic conditions, three weighted conditions (each with a weight of 25), and a link to 'Add weighted condition'.

36. **Save** the changes to the case. The following will appear.

Step ?

This item is locked for editing.
[Open in Dev Studio](#) ↗

Potential duplicate cases must meet the following basic conditions

When
Make is same AND Model is same AND Registration... Delete

And weighted conditions sum at least 50

When
TypeOfVehicle is equal to "Four Wheeler" 25 Delete

When
Fuel Type is equal to "Petrol" 25 Delete

+ Add weighted condition

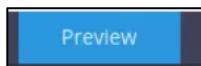
This screenshot shows the step after saving. A yellow box indicates it is 'locked for editing' with a link to 'Open in Dev Studio'. The configuration remains the same as the previous screenshot.

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.

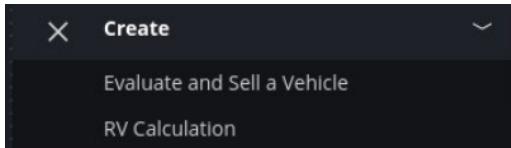
Task 3: Testing Duplicate Search

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

The screenshot shows the 'Evaluate and Sell a Vehicle' form. At the top, there are two tabs: '1. Customer Details' (which has a green checkmark) and '2. Vehicle Details'. Below the tabs, there's a 'Vehicle Picture' section with a 'Filename' input field and an 'Attach' button. Under 'Vehicle Details', there's a 'Registration Number' input field. The 'Vehicle Details' section is expanded, showing four input fields: 'Model' (highlighted with a red box), 'Make' (highlighted with a red box), 'Fuel Type', and 'TypeOfVehicle' (highlighted with a red box). The 'TypeOfVehicle' field has a dropdown arrow at the end.

2. Create a second/third case following the previous steps. The following will appear after the second case is processed.

A **Display duplicate cases**
Due 7 days from now

The current case was identified as a potential duplicate of the following:

Case ID	Created on	Status
E-2	Apr 7, 2021	New
E-1	Apr 7, 2021	New

How do you want to resolve the event?

→

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.

Duplicate case analysis				
Field (Current)	Value	Field (E-8002)	Value	Score
Vehicle Details > M...		Vehicle Details > Make		--
Vehicle Details > M...		Vehicle Details > Model		--
Vehicle Details > Re...		Vehicle Details > Registrati...		--
Vehicle Details > Ty...	Four Wheeler	--	Four Wheeler	25
Vehicle Details > Fu...	Petrol	--	Petrol	25

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

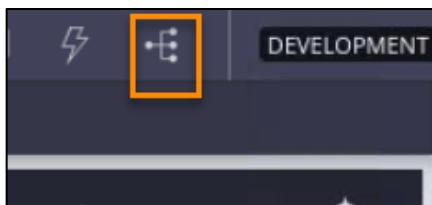
Run the case type and verify the changes

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

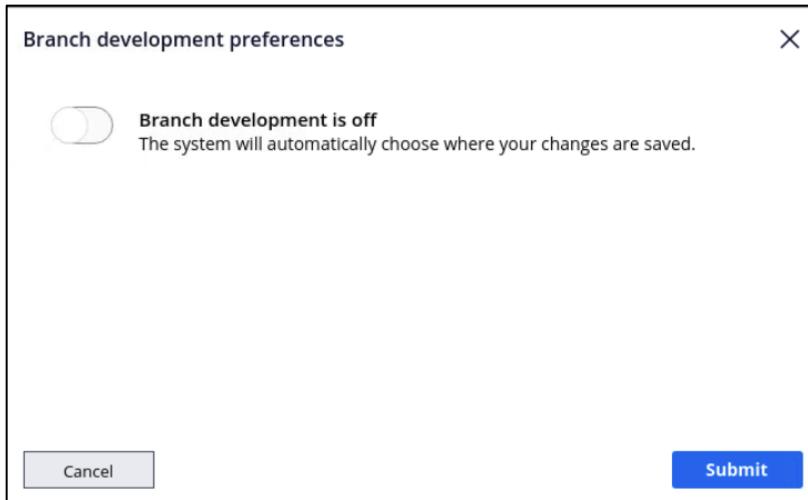
Detailed Steps

Task 1: Login and enable branch development

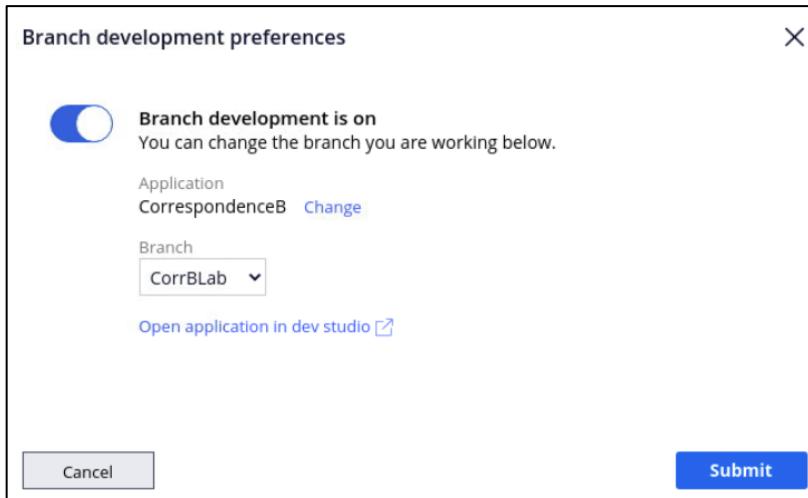
1. Log in and use the credentials **author@corrB** and **rules**.
2. From the title bar click the **Toggle branch development** button.



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

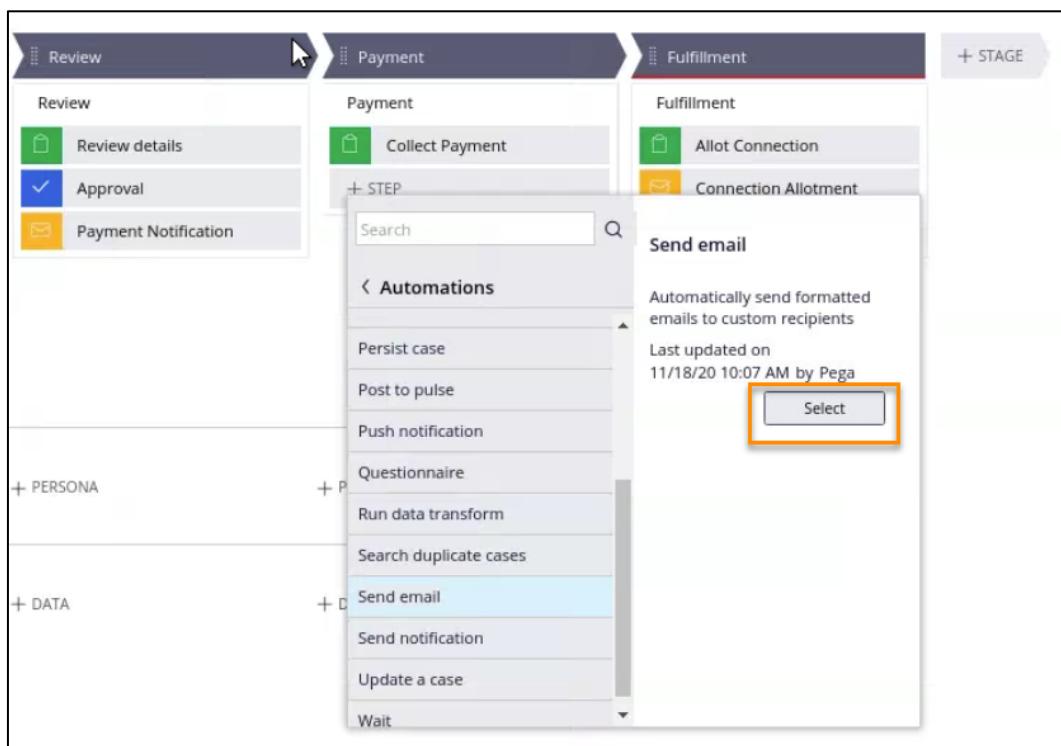
1. Navigate to the life cycle view **Case Types->New Connection**

The screenshot shows the Pegasystems APP STUDIO interface with the application name "CorrespondenceB" selected. On the left, there is a vertical sidebar with icons for Overview, Case types (which is highlighted with an orange border), Data, Channels, Users, and Settings. The main area is titled "Case types" and contains a search bar with the placeholder "Search case types..." and a result count of "1 case type". A table lists one case type: "New Connection" under the "Standard" type. The "New Connection" row is also highlighted with an orange border.

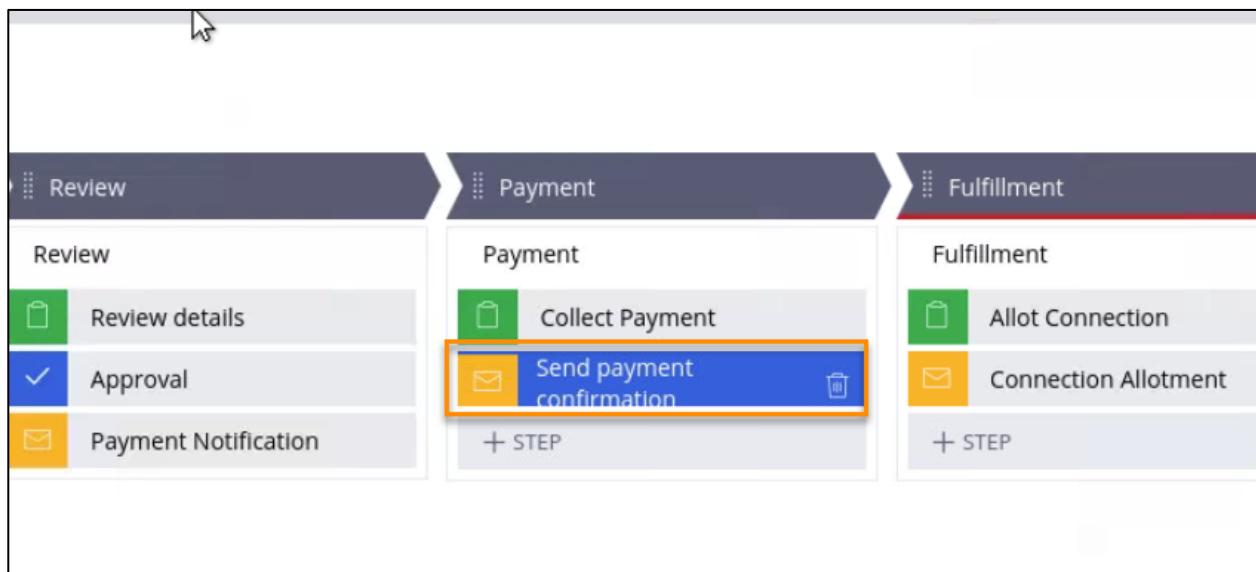
2. In the **Payment** process add a new step

The screenshot shows the Pegasystems process editor with the "DEVELOPMENT" tab selected. At the top, there are buttons for "Preview", "Actions", "Save and run", and "Save". Below the toolbar, there are tabs for "Life cycle" and "Optional actions". The process flow is divided into three stages: "Review", "Payment", and "Fulfillment". The "Payment" stage is currently active. Within the "Payment" stage, there is a step labeled "Collect Payment". A tooltip for this step shows options: "Collect information", "Approve/Reject", "Multi-step form", and "More...". The "More..." option is highlighted with an orange border. At the bottom of each stage, there are "+ PERSONA" buttons.

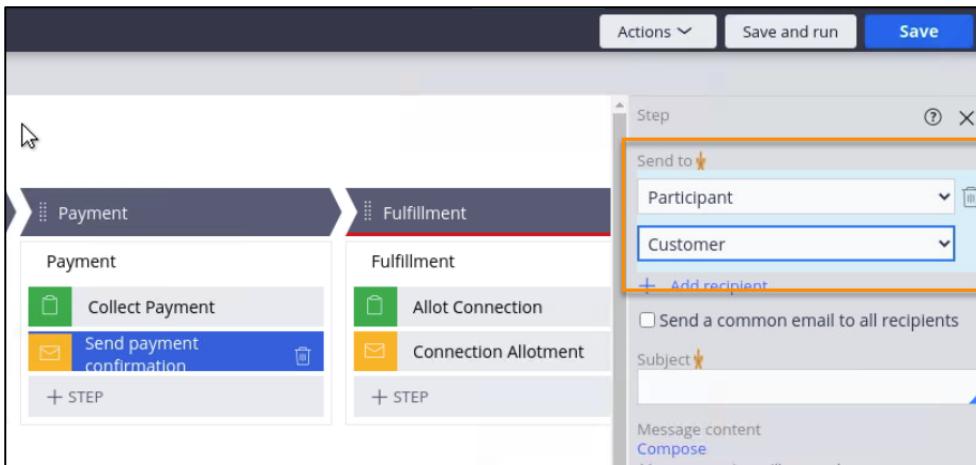
3. Click **+STEP > More > Automations > Send Email > Select.**



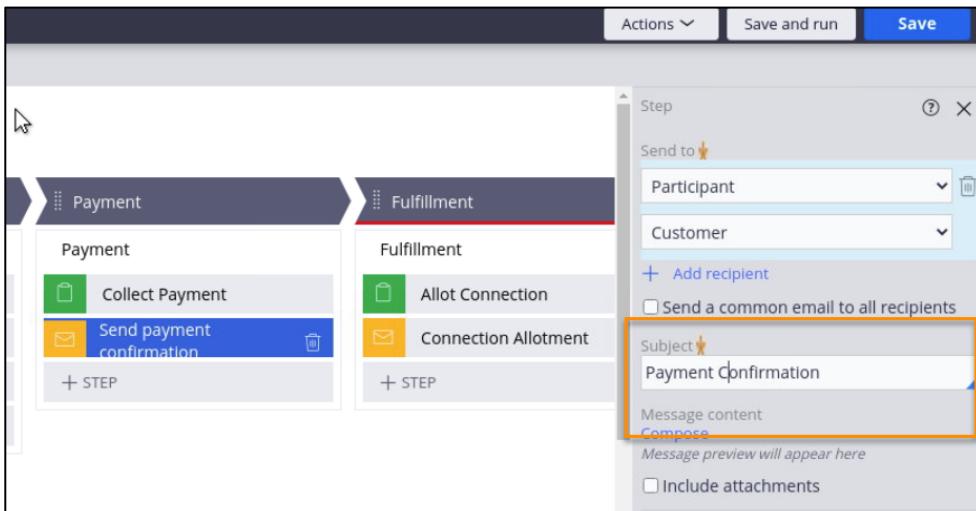
4. Name the send email step **Send payment confirmation**.



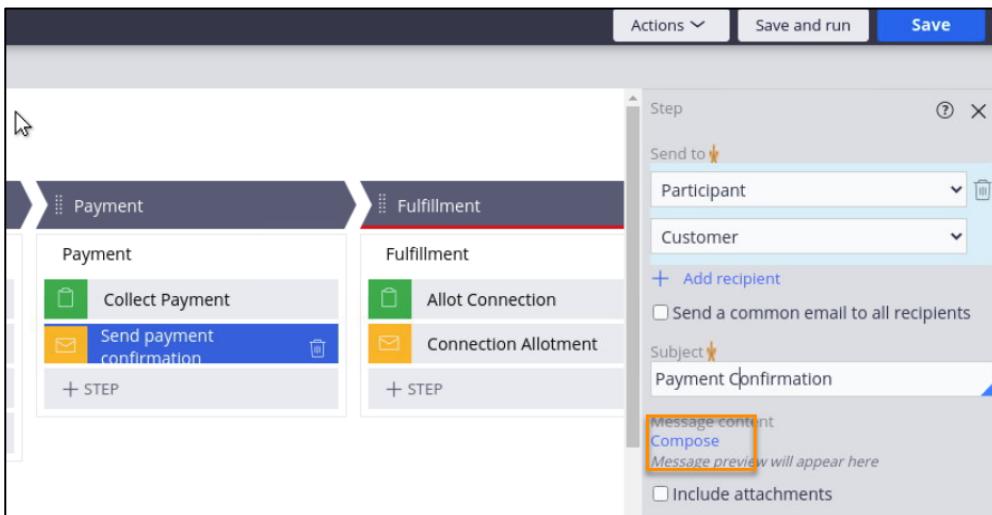
5. In the context menu select **Participant** from the **Send To** drop-down.
6. Select **Customer** from the drop-down below **Send To**.



7. In the **Subject** field enter Payment Confirmation.



8. Click **Compose** to enter the email message

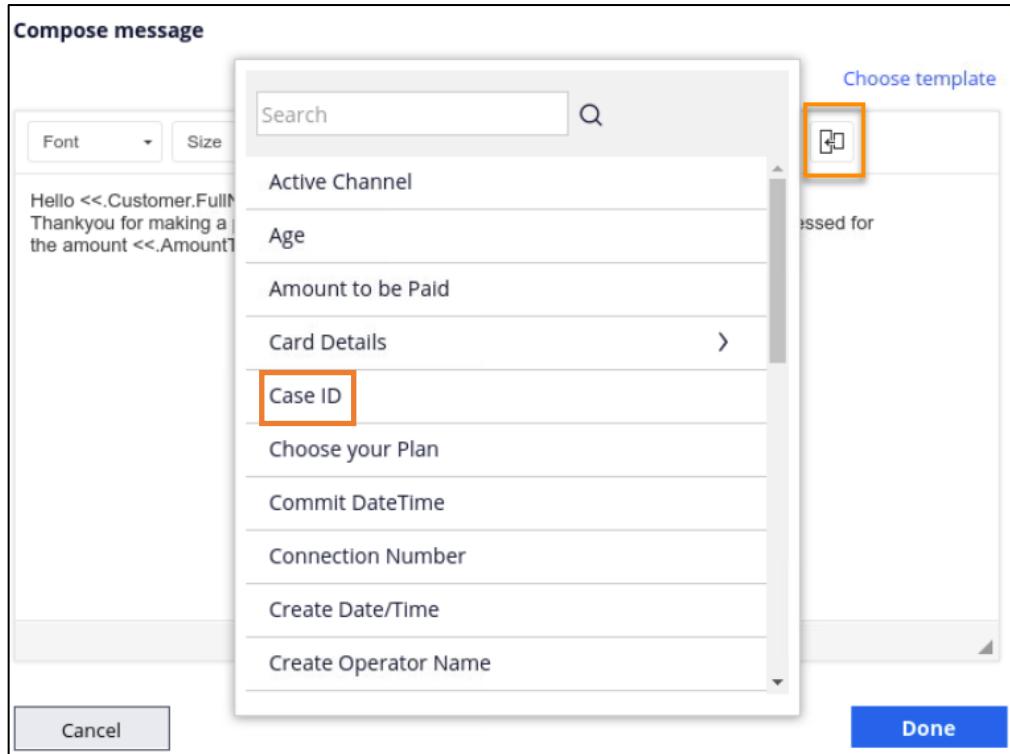


9. In the **text editor** input this for the email message

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



Compose message

[Choose template](#)

Font Size **I** U

Hello <<.Customer.FullName>>,
Thankyou for making a payment for connection order <<.pyID>> . This payment was processed for
the amount <<.AmountToBePaid>>.

Cancel **Done**

10. Click **Done**.

11. Save the case type.

Task 3: Verify Your Work

1. Click **Save and run**.

← Case type: New Connection

Workflow Data model Views Settings Actions **Save and run** **Save**

Case life cycle
View: Steps, Personas, Data, Releases (All) +

Create → New → Review → Payment → Fulfillment

New

- Collect Customer Details
- Collect Address Proof
- Collect Plan Details
- + FORM STEP
- Create Customer Party

Review

- Review details
- Approval
- Payment Notification
- + STEP

Payment

- Collect Payment
- Send payment confirmation**
- + STEP

Fulfillment

- Allot Connection
- Connection Allotment
- + STEP

Step

Send to:

Participant
Customer

+ Add recipient

Send a common email to all recipients

Subject: Payment Confirmation

Message content:

```
Hello <<.Customer.FullName>>, Thankyou for making a payment for connection order <<.pyID>>, This payment was processed for the am...
```

2. Check the Is Current Address same as Permanent Address box then click **continue**.

N-5003
New Connection

Customer

First Name *
Ted

Last Name *
Smith

Full Name
Ted Smith

Date of Birth

Email ID *
tsmith@test.com

Phone number(if any)

Is Current Address same as Permanent Address?

Permanent Address

Door No. *
111

Area *
222

City *
Boston

State *
Tamil Nadu

Pincode *
9987

Current Address

Door No. *
111

Area *
222

City *
Boston

State *
Tamil Nadu

Pincode *
9987

Priority 20

Status NEW

Created author less than a minute ago

Updated author less than a minute ago

Details

Pulse

Cancel Save Continue

3. Click **Continue**.
4. Select **Wifi** from the **Choose your plan** dropdown.
5. Click **Apply** for the **Plan Name** "Pan 499".

A Collect Plan Details

Collect Customer Details Collect Address Proof Collect Plan Details

Choose your Plan *

Wifi

▼ Wifi Plans

	Data Usage	Plan Name	Tariff	Validity	
1	2GB	Plan 299	\$299.00	28 Days	Apply
2	1.5GB	Plan 499	\$499.00	58 Days	Apply
3	2GB	Plan 699	\$699.00	84 Days	Apply

Back Save Finish

6. Click **Finish**.
7. Click **Go** to open **Review Details**.

To do

W Review details

Review (Review)

Is Current Address same as Permanent Address? True

Address Proof --

Choose your Plan Wifi
Selected Plan Plan 499
Amount to be Paid \$499.00
Payment Mode --
Phone number --

8. Click **Submit**.

W Review details

PlanType Wifi
Selected Plan Plan 499

Customer	Permanent Address	Current Address
First Name Ted	Door No. 111	Door No. 111
Last Name Smith	Area 222	Area 222
Full Name Ted Smith	City Boston	City Boston
Date of Birth --	State Tamil Nadu	State Tamil Nadu
Email ID tsmith@test.com	Pincode 9987	Pincode 9987
Phone number(if any) --	True Is Current Address same as Permanent Address?	

Cancel Save Submit

9. Click **Go** to open the **Get Approval** step.

To do

N Get Approval
Please approve or reject this New Connection • Due 40 minutes from now

Is Current Address same as True Permanent Address?

Address Proof
--

Choose your Plan Wifi
Selected Plan Plan 499
Amount to be Paid \$499.00
Payment Mode --
Phone number --

Go

10. Click **Approve**.

N Approval
Due 39 minutes from now

Notes

Cancel Approve

Is Current Address same as True Permanent Address?

Address Proof
--

Choose your Plan Wifi
Selected Plan Plan 499
Amount to be Paid \$499.00
Payment Mode --
Phone number --

11. Select the **Cash** option and click **Submit**.

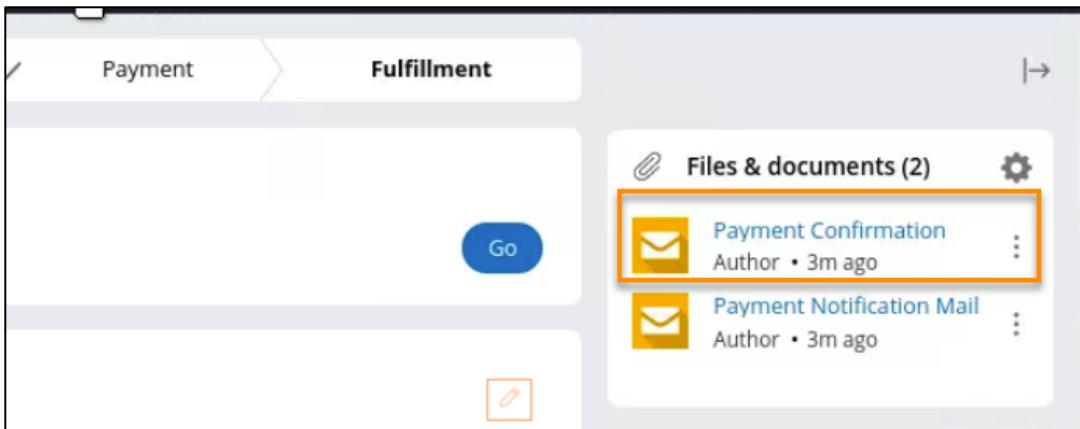
A Collect Payment

Amount to be Paid \$499.00

Payment Mode Cash Card

Cancel Save 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:

A pop-up window titled 'View email'. The email details are as follows:

View email

Sent: Mar 31, 2021 9:26:55 AM From ip-10-1-0-4
From: default@PegaSample.com
To: tsmith@test.com
Subject: Payment Confirmation

Hello Ted Smith,
Thankyou for making a payment for connection order N-5006 . This payment was processed for the amount \$499.00.

The email content is displayed in a large text area. A cursor arrow is visible at the bottom right of the 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.

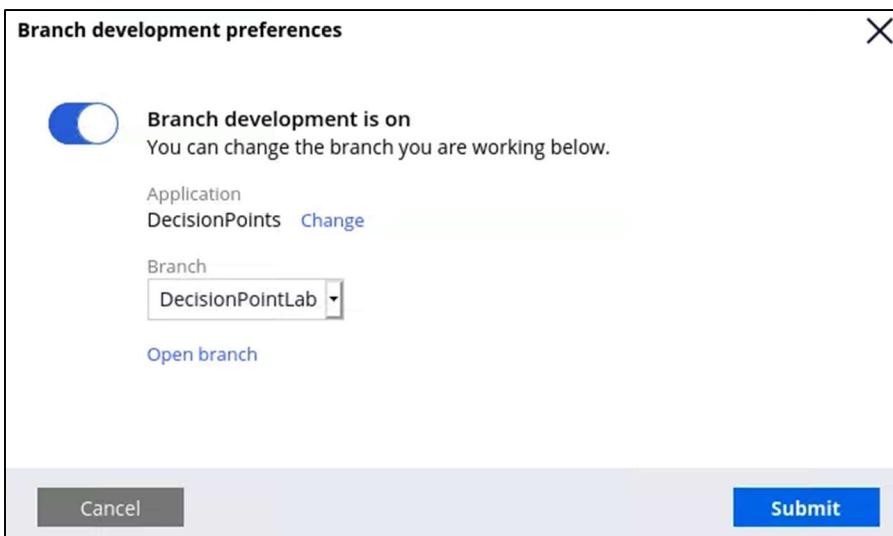
Detailed Steps

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**.

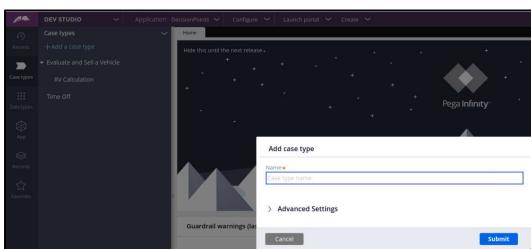


4. Branch Development is active.



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**.

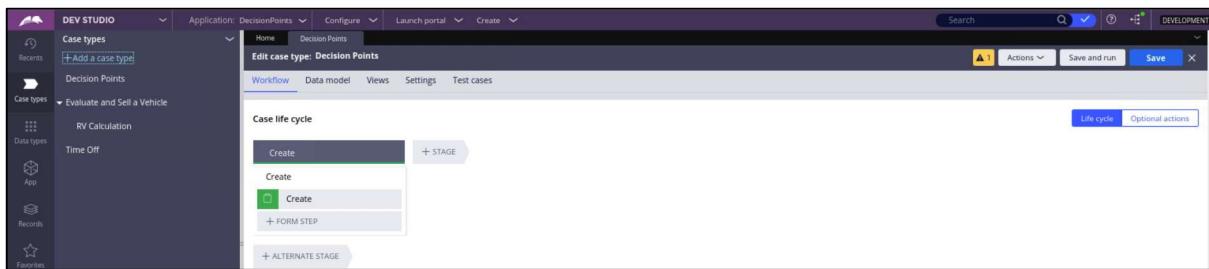
Add case type

Name ★
Decision Points

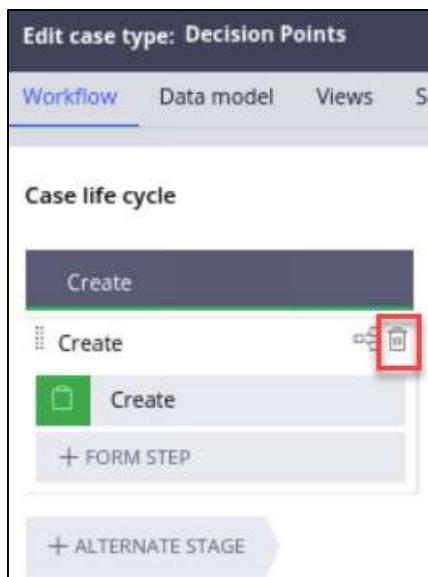
> Advanced Settings

Cancel Submit

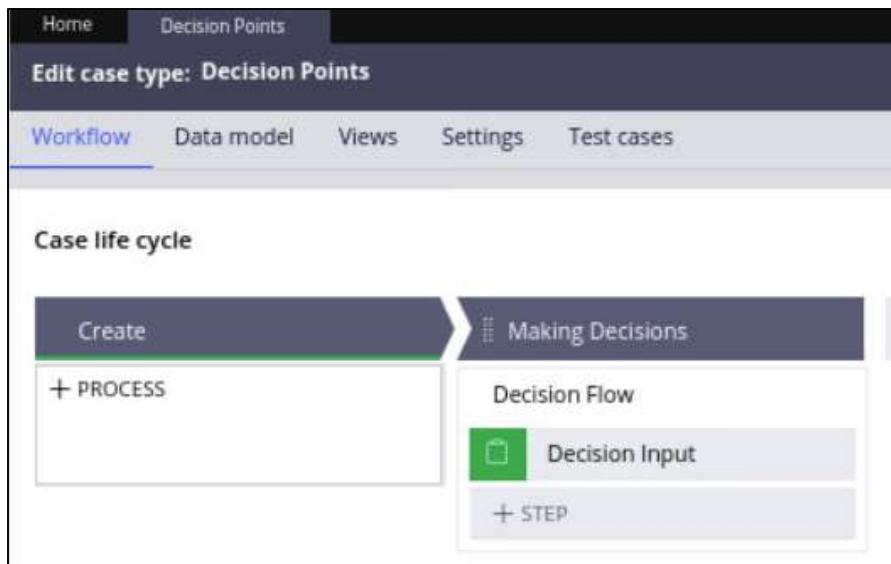
3. Click **Submit**.
4. The case designer displays the Create stage.



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.

- Click +Add field
- Enter Field name: Desc and Type: Text (single line) and click Submit.

+ Add field

Field name	Desc
Type	Text (single line)
> Advanced	
Cancel	Submit & add another
Submit	

- Repeat steps a and b for Field name: Range and Type: Decimal.

+ Add field

Field name	Range	
Type	Decimal	
Advanced		
Cancel	Submit & add another	Submit

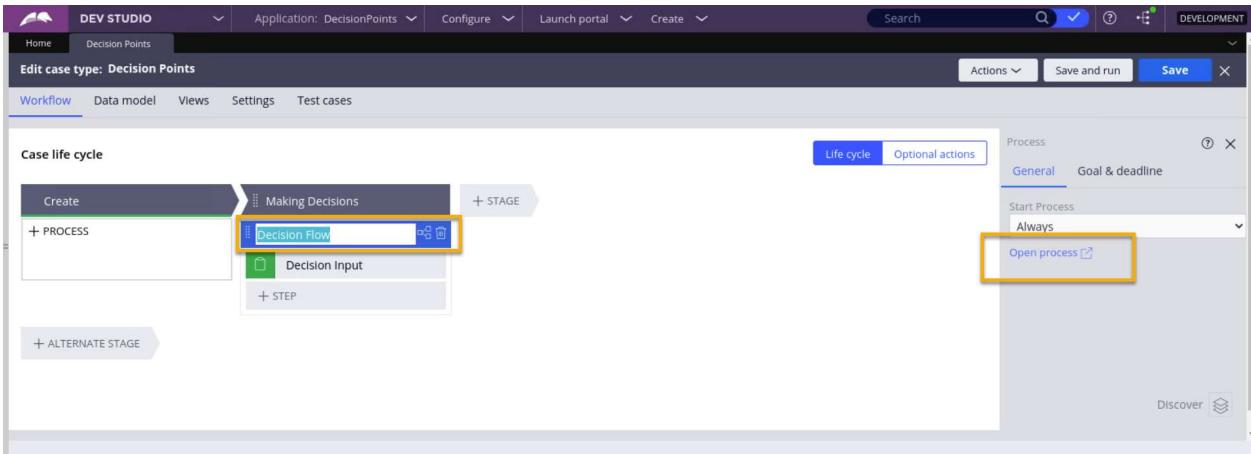
d. Update the field options as below.

Field	Type	Options
Desc	Text (single line)	Required
Range	Decimal	Optional

+ Add field

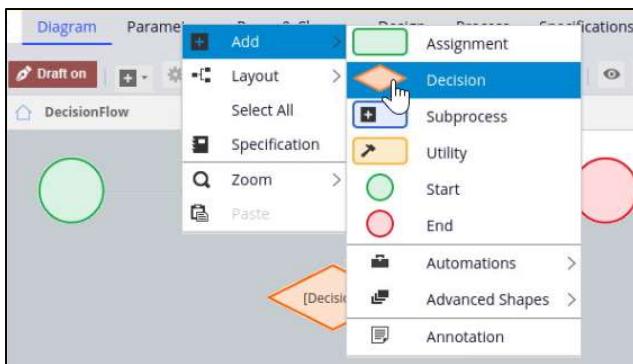
e. Click **Submit** and **Save**.

8. Click Process: **Decision Flow > Open Process**. Follow the instructions below to modify the flow rule.

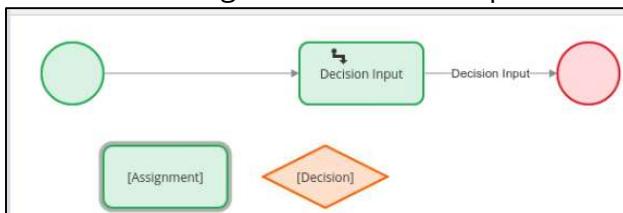


IMPORTANT: Check out the rule.

- 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**.

Assignment properties

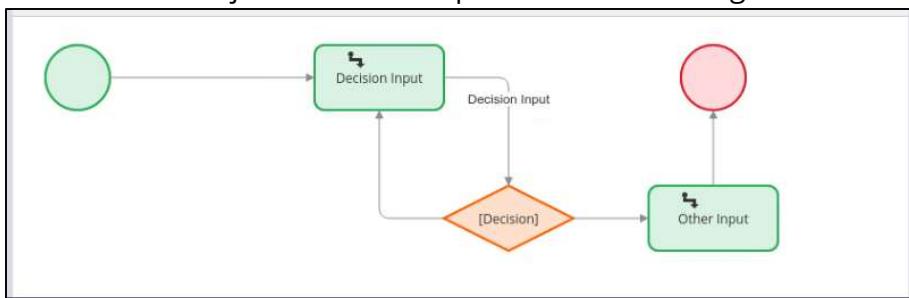
Assignment: Other Input
A step in your process that requires human judgment and input.

Routing
Who should complete this step?
Route to:
Current operator

Service level agreement
How long should it take to complete this step?
Service level

Cancel **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`

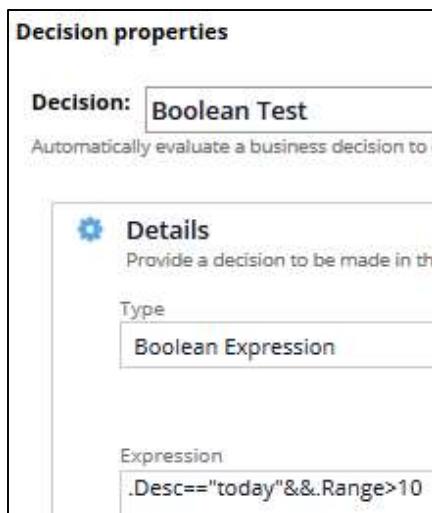
Decision properties

Decision: Boolean Test
Automatically evaluate a business decision to determine how this case progresses.

Details
Provide a decision to be made in the current process

Type: Boolean Expression

Expression: `.Desc=="today" && .Range>10`



10. Unit test the expression.

- Click the **Build an expression** field  icon (below the expression input field)

Decision properties

Decision: Boolean Test
Automatically evaluate a business decision to determine how this case progresses.

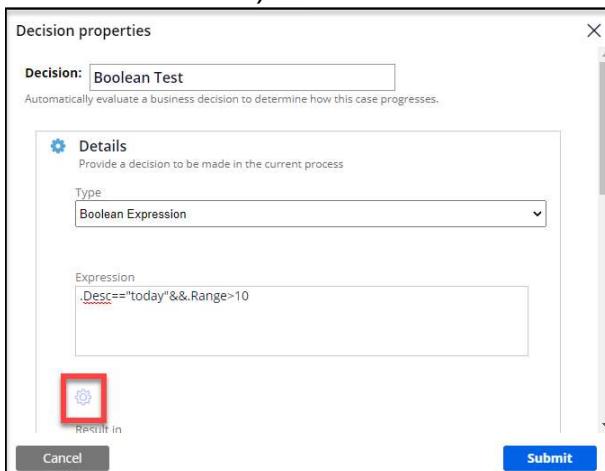
Details
Provide a decision to be made in the current process

Type: Boolean Expression

Expression: `.Desc=="today" && .Range>10`

 Result in

Cancel **Submit**



- Click **Test**.
- Enter **today** in the Desc input box and **11** in the Range input box. Click **Test**.
- Click **Test** again to see the **Result** (true).

Expression builder

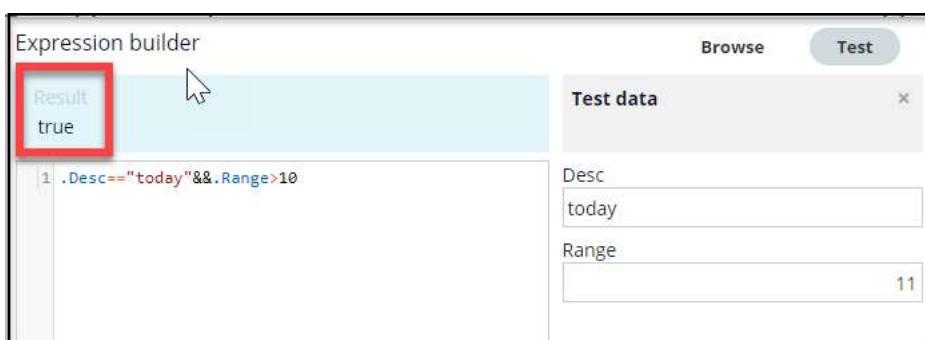
Result true

`1. Desc=="today" && .Range>10`

Browse **Test**

Test data

Desc	today
Range	11



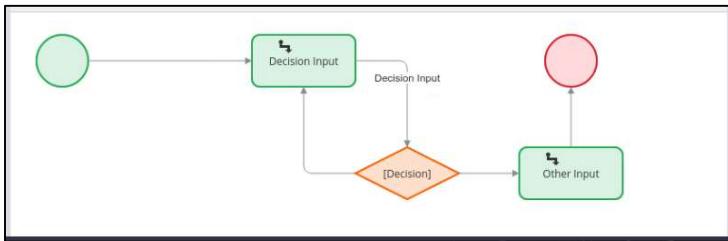
- Change the Range value from **11** to **10**. Click **Test**.

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.

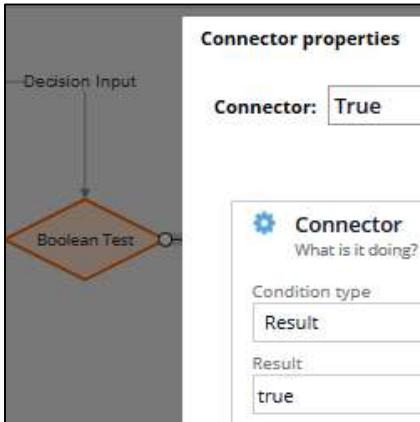
a. Double-click the right connector (the connector going towards the "Other Input" assignment shape) and modify the configuration as given below.

b. **Connector: True**

Condition type: Result

Result: true

Click **Submit**.

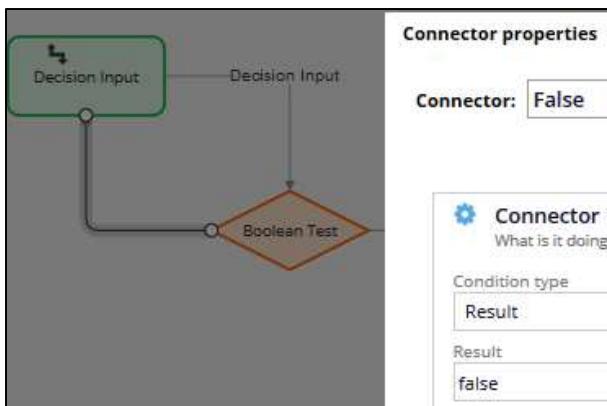


c. Double Click the left connector (the connector going towards the "Decision Input" assignment shape) and modify the configuration as follows:

d. **Connector: False**

Condition type: Result

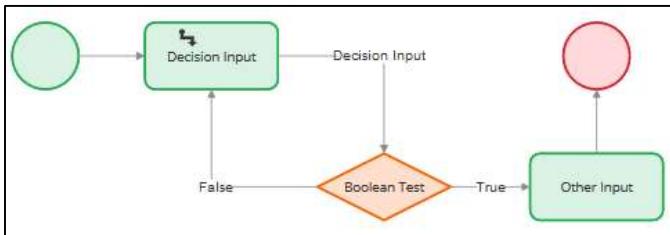
Result: false



- 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:

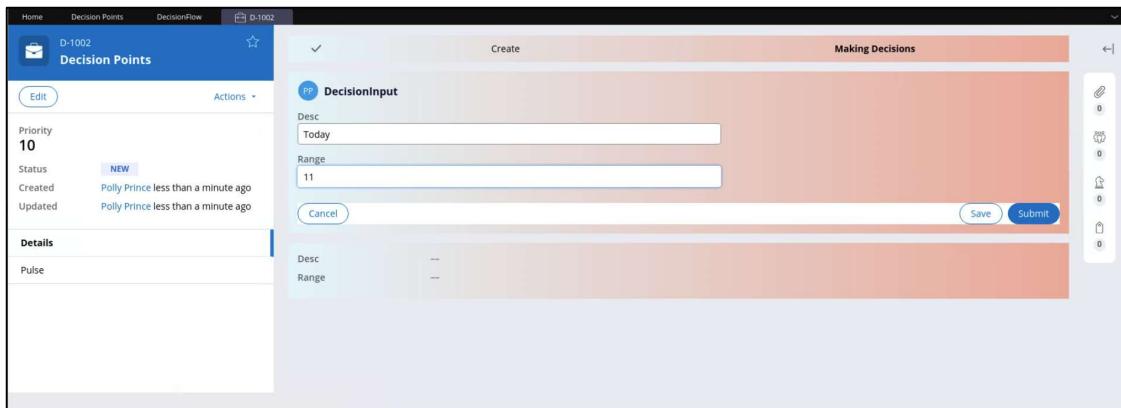


- h. Click the **Check in** button, enter the Check-in comments and close.

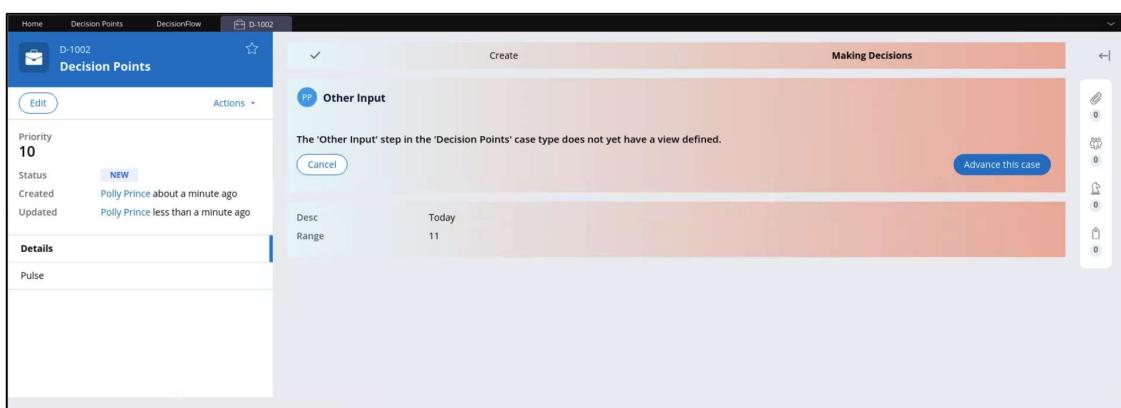
12. Refresh the Decision Points case type by clicking on **Actions > Refresh**.

13. Run the case type. Click **Save and run**.

14. Enter **Today** for Desc and **11** for Range. Click **Submit**.

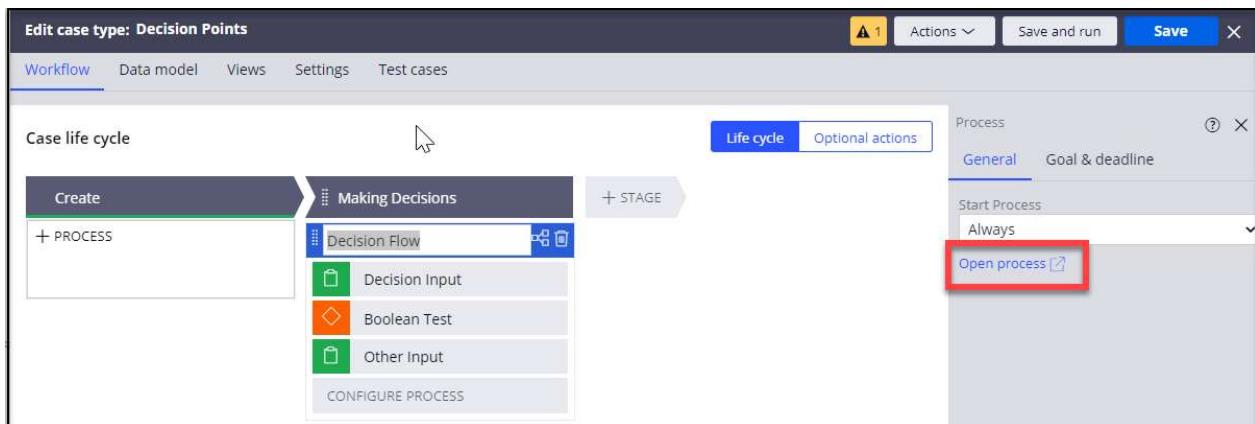


15. The decision evaluates to True and proceeds to the “Other Input” assignment shape. Close the tab.



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**

Decision properties

Decision: **Table Test**

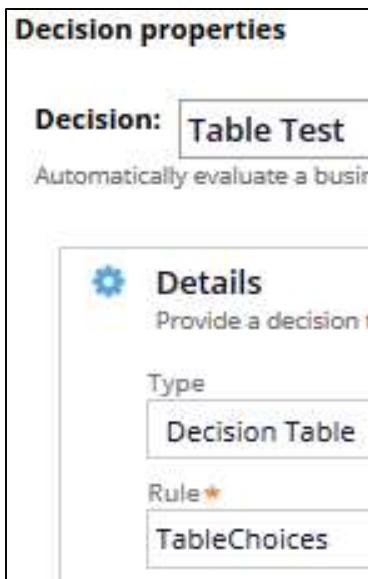
Automatically evaluate a business decision to determine how this case progresses.

Details

Provide a decision to be made in the current process

Type: Decision Table

Rule*: TableChoices



19. Create the decision table rule **TableChoices**.

- Click the crosshair icon to open/create the **TableChoices** rule.

Decision properties

Decision: **Table Test**

Automatically evaluate a business decision to determine how this case progresses.

Details

Provide a decision to be made in the current process

Type: Decision Table

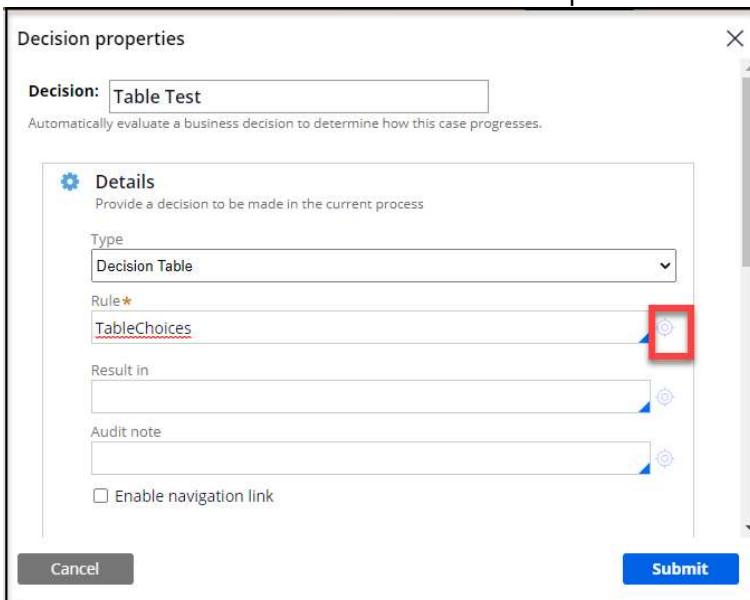
Rule*: **TableChoices**

Result in:

Audit note:

Enable navigation link

Cancel **Submit**



- Click **Create and open** to create and open the rule **TableChoices**.

Create Decision Table

Decision Table Record Configuration

Label*: TableChoices
Identifier: TableChoices Edit
A short description or title for this record

Context

Development branch: DecisionPointLab
DecisionPoints

Apply to*: WIND-Auto-Work-DecisionPoints
Add to ruleset*: DecisionPoints

Current work item

Work item to associate: Select...

- c. Modify the rule to match the image below. Double click the cell below Conditions.

Conditions	Actions
if	Return
otherwise	

- d. In the new window that opens add .Desc as the property. Click Save.

Decision Table property chooser

Select a Property

Property: Desc

Label: Desc

Use Range:

Use Operator: =

Save Cancel

- e. Add Today in the cell below Desc.

Conditions	Actions
if	Desc
otherwise	

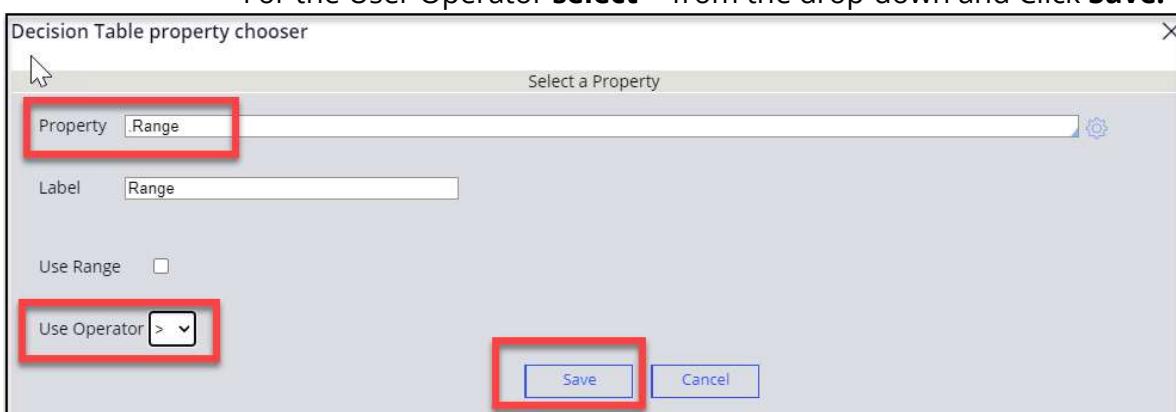
- f. Click the Insert Row After icon twice.



- 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.

	Conditions		Actions	
	◦ Desc	◦ Range >		Return
◦ if	Today	10	→	Proceed
◦ else if		5	→	Redo
◦ else if	Future		→	Proceed
otherwise			→	Stop

- 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.

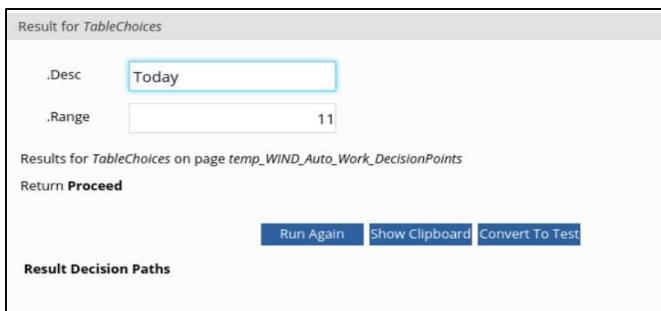
Result for TableChoices

.Desc	<input type="text" value="Today"/>
.Range	<input type="text" value="11"/>

Results for TableChoices on page temp_WIND_Auto_Work_DecisionPoints
Return **Proceed**

Run Again **Show Clipboard** **Convert To Test**

Result Decision Paths

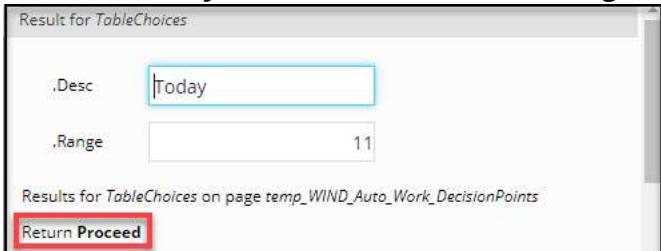


4. Enter **Today** for Desc and **11** for the Range. Click **Run Again**.

Result for TableChoices

.Desc	<input type="text" value="Today"/>
.Range	<input type="text" value="11"/>

Results for TableChoices on page temp_WIND_Auto_Work_DecisionPoints
Return Proceed

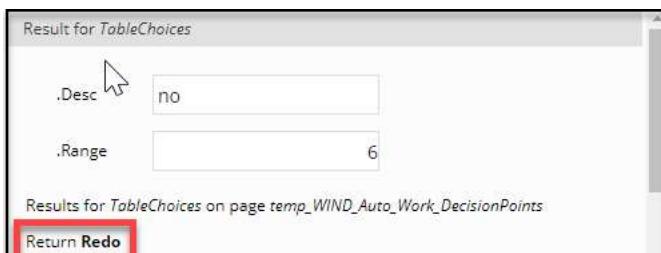


5. Enter **no** for Desc and **6** for the Range. Click **Run Again**.

Result for TableChoices

.Desc	<input type="text" value="no"/>
.Range	<input type="text" value="6"/>

Results for TableChoices on page temp_WIND_Auto_Work_DecisionPoints
Return Redo

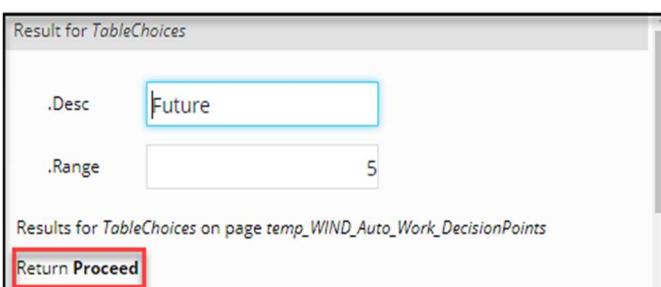


6. Enter **Future** for Desc and **5** for the Range. Click **Run Again**.

Result for TableChoices

.Desc	<input type="text" value="Future"/>
.Range	<input type="text" value="5"/>

Results for TableChoices on page temp_WIND_Auto_Work_DecisionPoints
Return Proceed

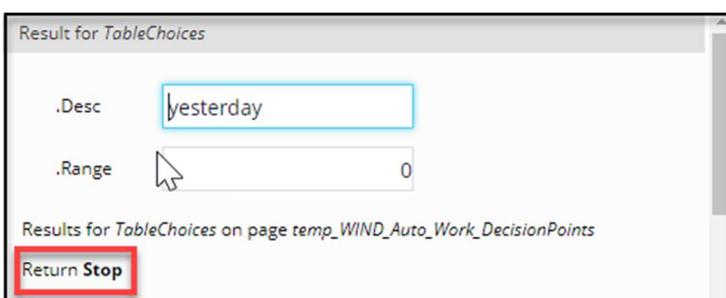


7. Enter **yesterday** for Desc and **0** for Range. Click **Run Again**.

Result for TableChoices

.Desc	<input type="text" value="yesterday"/>
.Range	<input type="text" value="0"/>

Results for TableChoices on page temp_WIND_Auto_Work_DecisionPoints
Return Stop

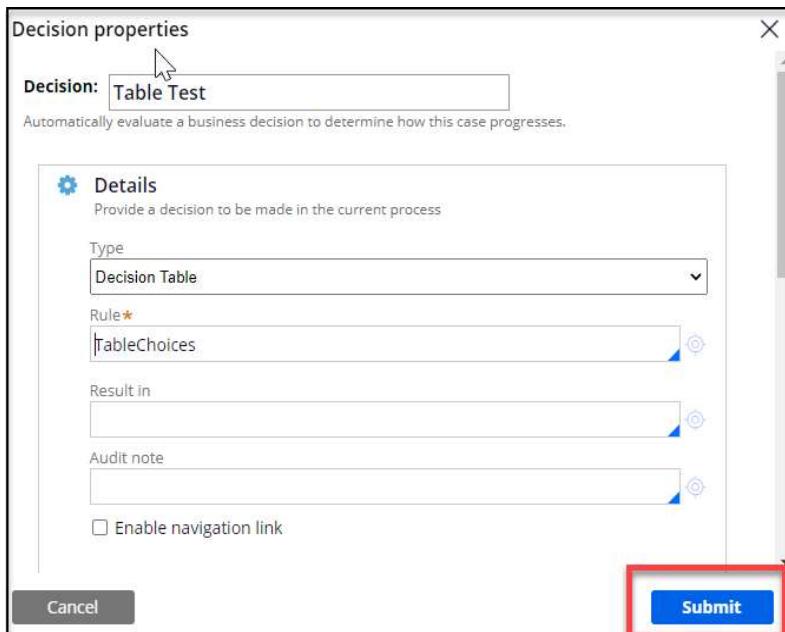


8. Close the test run window.

9. Save the **TableChoices** rule and close the window.

NOTE: Check in the rule if required.

10. Click **Submit** on the Decision Properties window.



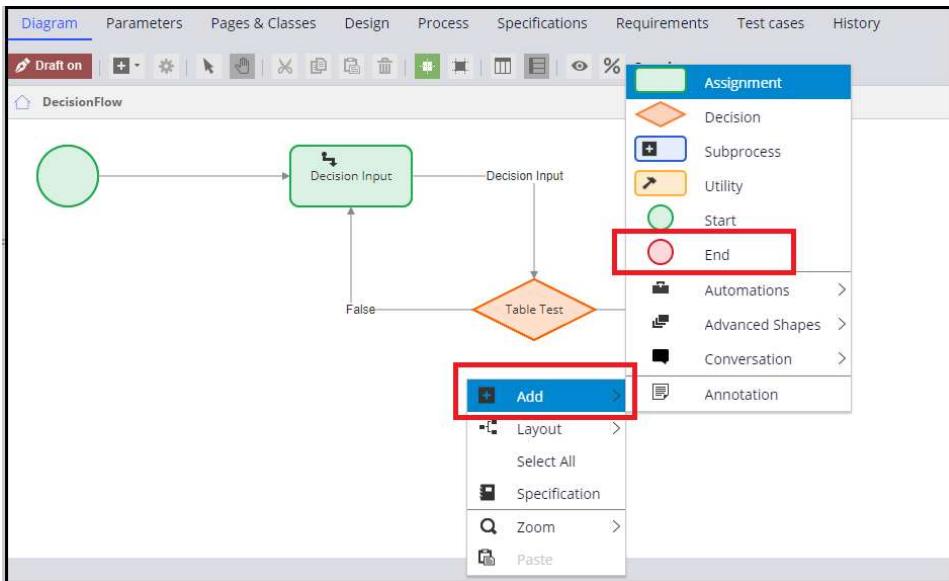
11. Configure the connectors for the decision shape, decision table
(Double click on each connector to modify the configuration)

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

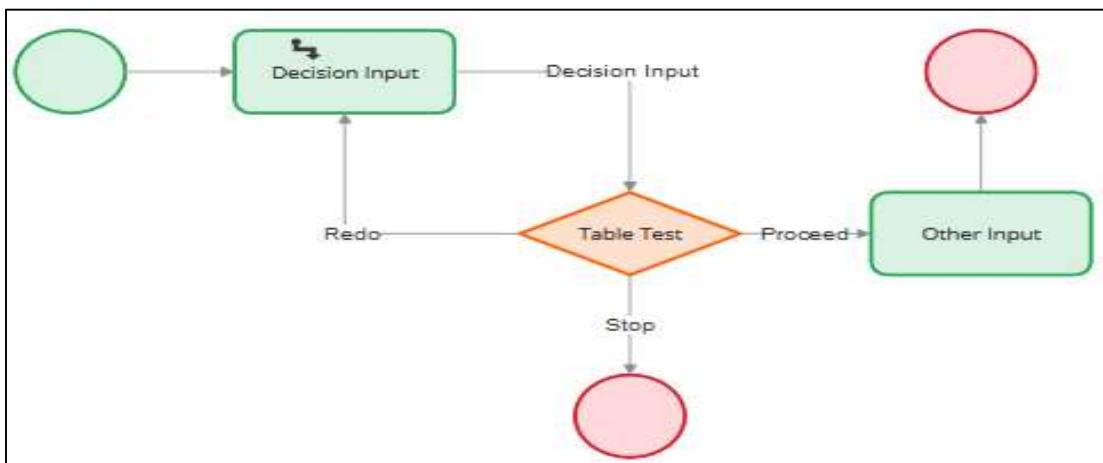
Condition Type: Result

Result: Redo

Click **Submit**.

16. Click **Check in** and enter comments.

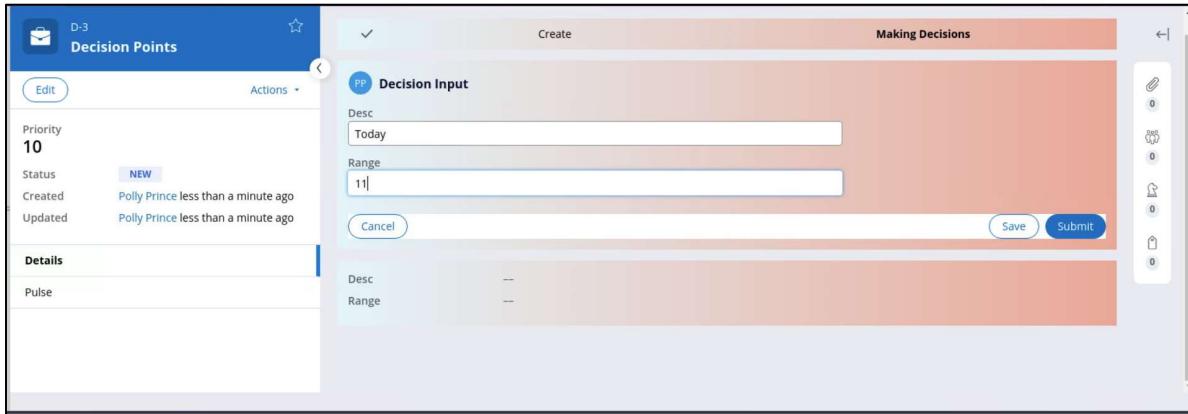
17. Click **Save** (to save the flow rule).



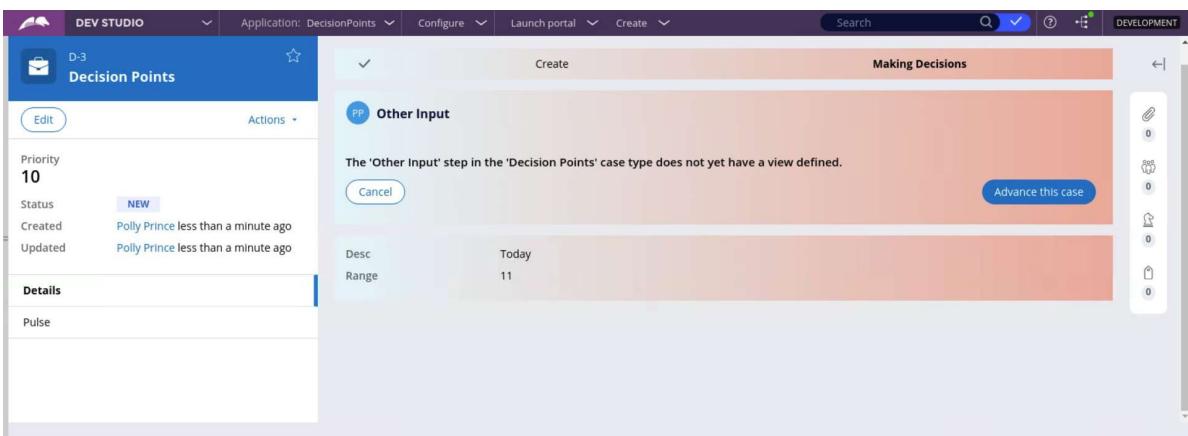
Task 4: Test the Decision Points – Decision Table

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.

Collect Customer Details

Fields Validations

Search Q

No fields in the view.

Fields > Views > + Add field

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

Collect Customer Details

Fields Validations

Search Q

Fields > Views > + Add field

Field	Type	Options
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.

The screenshot shows a Pegasystems application interface. On the left, there is a sidebar with a blue header containing the identifier "H-1001" and the title "Home Loan". Below the header, there are buttons for "Edit" and "Actions". Under "Priority", the value "10" is displayed. Under "Status", it says "NEW" and "Created" and "Updated" both show the timestamp "Iggy Intro less than a minute ago". A section titled "Details" contains the word "Pulse". On the right side of the screen, a modal dialog box is open with a title "Collect Customer Details". This dialog contains five input fields: "First Name", "Last Name", "Date Of Birth" (with a calendar icon), "Email", and "Phone". At the bottom of the dialog are two buttons: "Cancel" (in a light blue box) and "Save" (in a dark blue box) next to a "Submit" button.

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.

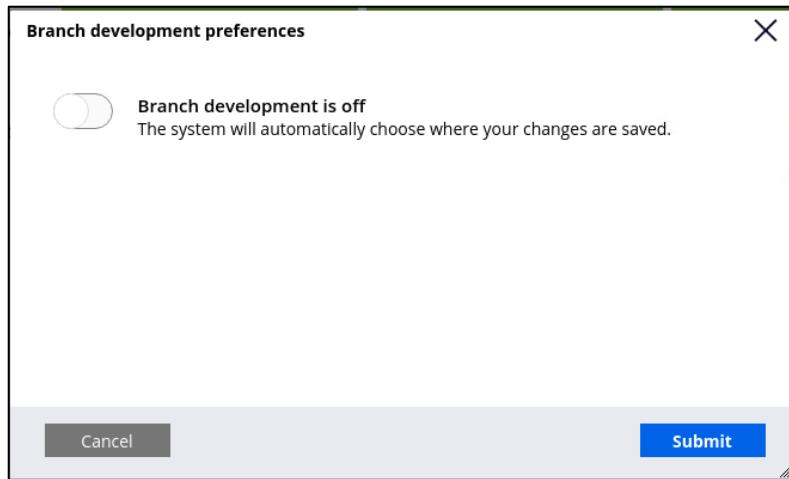
Detailed Steps

Task 1: Login and enable branch development

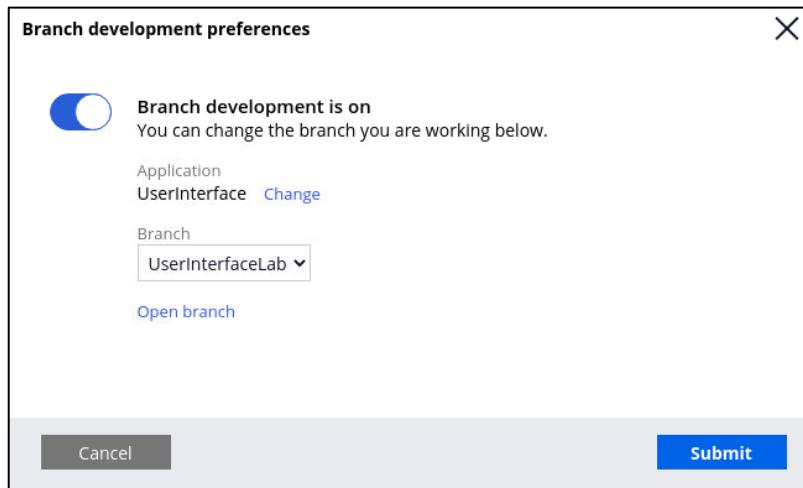
1. Log on with the User ID, **John_UI@UserInterface**, and the password, **rules**.
2. From the title bar, click the **Toggle branch development** button.



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.

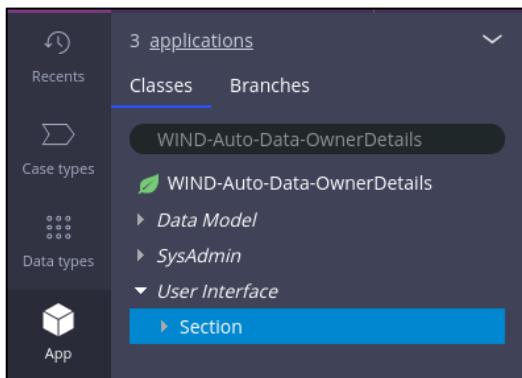


Task 2: Create the Customer details View

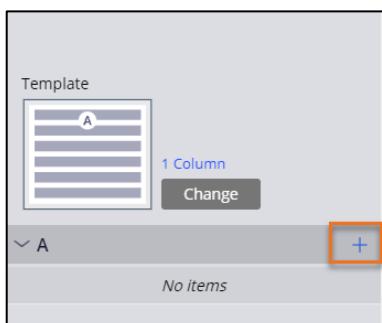
1. In the Navigation pane of Dev Studio, Click **Case types**, and then click the **Evaluate and sell a Vehicle** case type.
2. Click **Save and Run**.

The screenshot shows the Pega App Explorer interface. On the left, there's a sidebar with navigation icons for Recents, Case types, Data types, and App. The main pane displays the 'Evaluate and Sell a Vehicle' app under 'E-1'. A specific section titled 'Customer Details' is selected, showing its details. The section has tabs for 'Customer Details' and 'Vehicle Details'. The 'Customer Details' tab is active, showing fields for 'Address' (with three address line inputs) and 'City'. At the bottom right of the section are 'Save' and 'Continue' buttons. The overall interface is light blue and white.

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**.

The screenshot shows a 'Design' tab interface. On the left, there's a table structure with three rows. The first row contains a text input field with the placeholder 'lorem ipsum'. The second row also has a text input field with the same placeholder. The third row is identical. To the right of the table is a 'Template' sidebar. A context menu is open over the second row, showing a list of controls including 'Text Input' and a 'Change' button.

12. Hover over the **Text Input** control, and then click **Edit**.

The screenshot shows the same interface as above, but now the second row of the table is selected, indicated by a dashed blue border around the entire row. The text input field in the second row still contains 'lorem ipsum'.

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 (.)

The screenshot shows the 'Cell Properties' dialog box for a 'Text input' cell. The 'Property' field is set to '.CustomerName'. Other settings include 'Label' as 'Customer Name', 'Placeholder' as 'None', and 'Visibility' as 'Always'. The dialog box has tabs for 'General', 'Presentation', and 'Actions', with 'General' currently selected.

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.

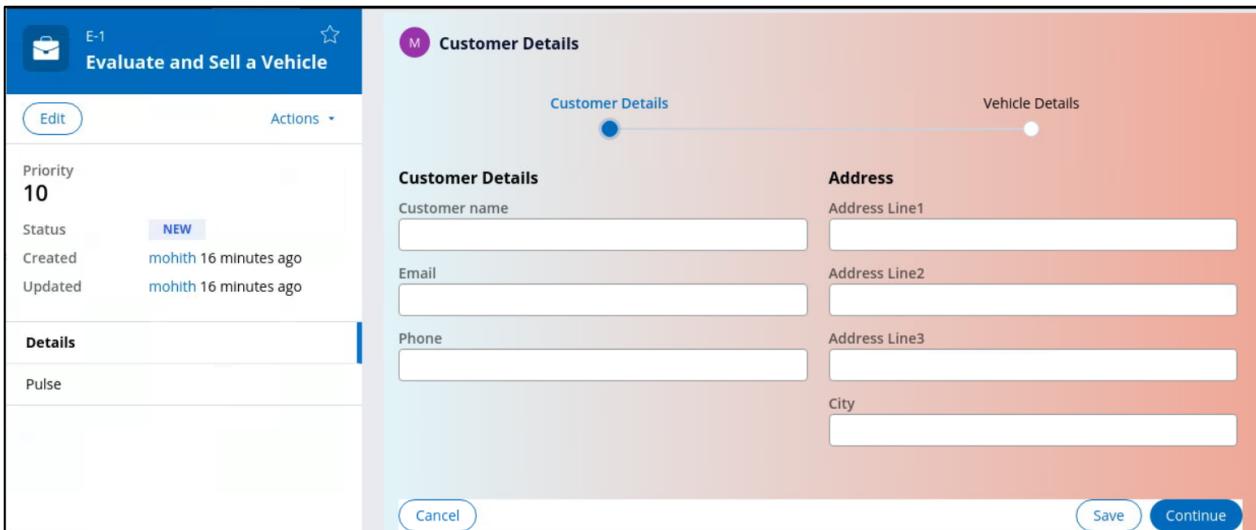
NOTE: the case should still be open in a tab in Dev Studio.

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.

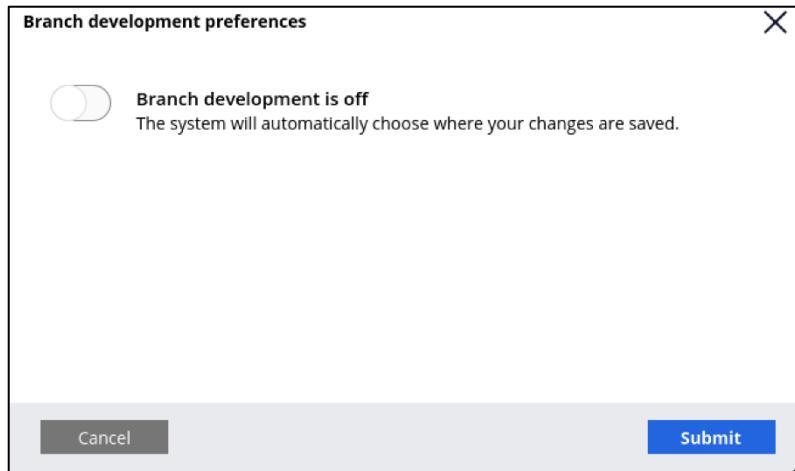
Detailed Steps

Task 1: Log in and enable branch development

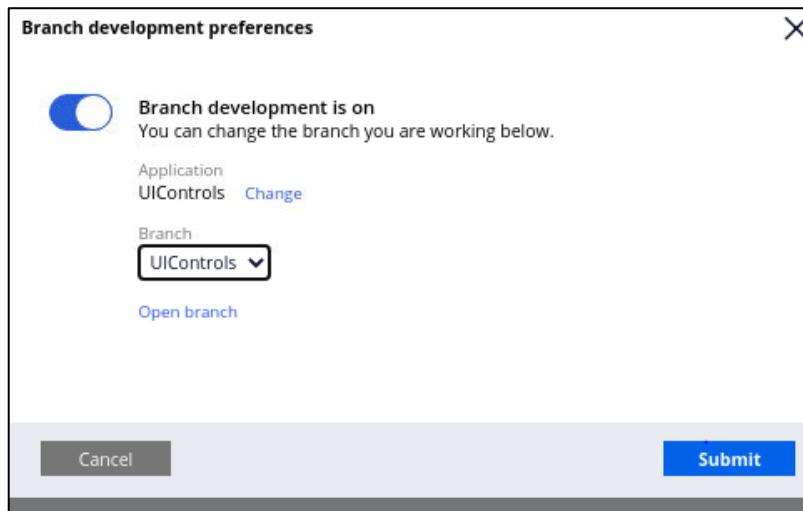
1. Turn Branch Development ON, from the title bar click the **Toggle branch development** button.



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.

Available components

Basic controls

-  Autocomplete
-  Click Button
-  Chart
-  Abc Checkbox
-  Date & time
-  Dropdown
-  Hierarchical Table (legacy)
-  Icon
-  www. Link
-  Multi-Select list
-  A B Radio button
-  B I U Rich text editor
-  Slider
-  Text area
-  Text input
-  Timeline

- In the **UI Elements: Date & Time** section click **Date** and then click **Dropdowns**.

UI Elements: Date & Time

The Date Time control enables a user to select a date and time from a calendar. You

[View design-time configuration](#)

The Date/Time picker includes multiple options for editable and read-only modes.

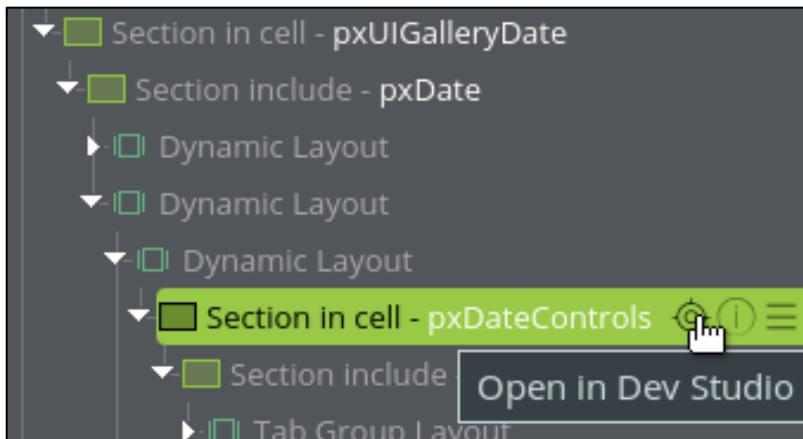
Control Type: **Date Time** | **Date** | **Date range** | **Time**

Standard No Typing **Dropdowns**

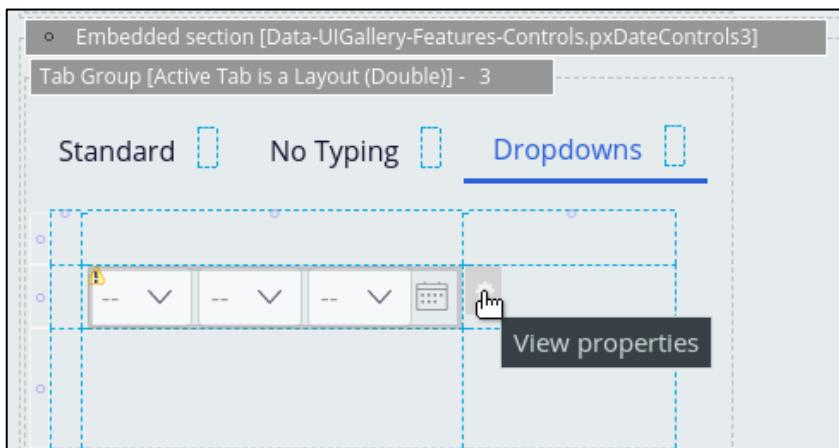


- In the **Developer Toolbar**, click **Live UI**, and then click the **pxDateControls** section.

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**.

Cell Properties

Date time [Change](#) | [Revert to property default](#)

General [Presentation](#) Actions

Edit option

Read-only value

Wrap text

Editable Settings

Specify size Auto Custom

Date/Time

Display mode

Display month in long format

Set AM as default

Enable calendar Yes No

Use native control on mobile

Calendar navigation Spinner Dropdown

Display range Next Previous

(Relative to, and including, the end user's current date)

Display week numbers on the calendar

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.

The screenshot shows the Pega Studio interface with the following details:

- Section - CollectMemberDetails** is selected.
- Submission Progress** is visible.
- Member Details** section contains fields for Name, Date of Birth, Pan Card, Mobile, Email ID, and Address.
- Case details** pane shows Last updated by JOHN_UI (1m ago), Created by JOHN_UI (1m ago).
- Open assignments** pane shows a task for Collect MemberDetails (New Member) assigned to JOHN_UI.
- Recent followers (0)** and **Recent content (0)** panes are also visible.
- Skin - FundManagement** is selected.
- The **Structure** pane on the right shows the hierarchical structure of the page, with the **Section - CollectMemberDetails** node highlighted.

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**.

The screenshot shows the **Cell Properties** pane for the Date of Birth field:

- Editable Settings** tab is selected.
- Specify size**: Auto (radio button selected).
- Date/Time**: Auto (dropdown selected).
- Display mode**: Dropdown lists (dropdown selected). Sub-options include:
 - Display month in long format
 - Set AM as default
- Enable calendar**: Yes (radio button selected). Sub-options include:
 - Use native control on mobile
- Calendar navigation**: Spinner (radio button selected). Sub-options include:
 - Dropdown
- Display range**: Next (radio button selected) with a value of 0 years. Previous (checkbox selected) with a value of 60 years.

13. In the Cell Properties pane, in the **Presentation** tab, change configurations on **Editable Settings** as given in the screenshot below. Click **Submit** button.

The screenshot shows the **Cell Properties** pane for the Date of Birth field with the following changes made in the **Editable Settings** tab:

- Specify size**: Custom (radio button selected).
- Date/Time**: Auto (dropdown selected).
- Display mode**: Dropdown lists (dropdown selected). Sub-options include:
 - Display month in long format
 - Set AM as default
- Enable calendar**: Yes (radio button selected). Sub-options include:
 - Use native control on mobile
- Calendar navigation**: Spinner (radio button selected). Sub-options include:
 - Dropdown
- Display range**: Next (radio button selected) with a value of 0 years. Previous (checkbox selected) with a value of 60 years.

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.

The screenshot shows a software interface for 'MemberRegistration'. On the left, there's a sidebar with 'Priority 10' and 'Status NEW'. The main area has tabs for 'Create' and 'New Member'. A 'To do' section contains a task card for 'Collect MemberDetails' under 'New Member (New Member)'. To the right of the card is a 'Go' button. Below the card, there are fields for 'Amount' (\$500.00), 'Photo' (with a placeholder '---'), and 'Percentage' (also with a placeholder '---').

4. Verify that the updated section is displayed.

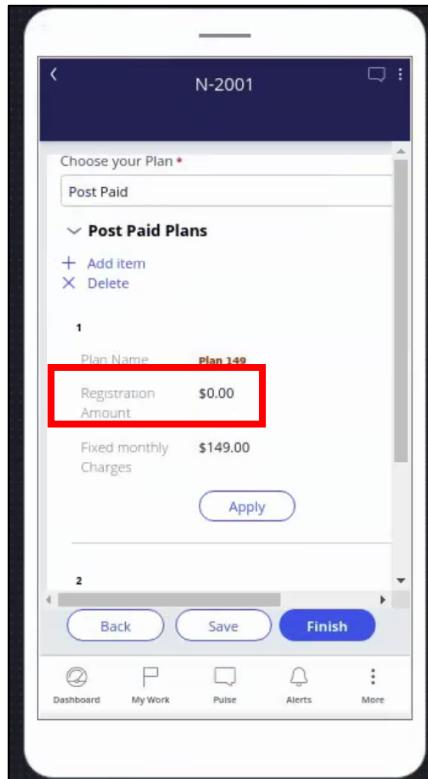
The screenshot shows the same software interface. The 'Submission Progress' section is now visible, containing a 'Member Details' form. The form includes fields for 'Name' (with a placeholder), 'Date of Birth' (with date pickers), 'Pan Card' (text input), 'Mobile' (text input), 'Email ID' (text input), and 'Address' (text input). At the bottom right of the form are 'Cancel', 'Save', and 'Submit' buttons.

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

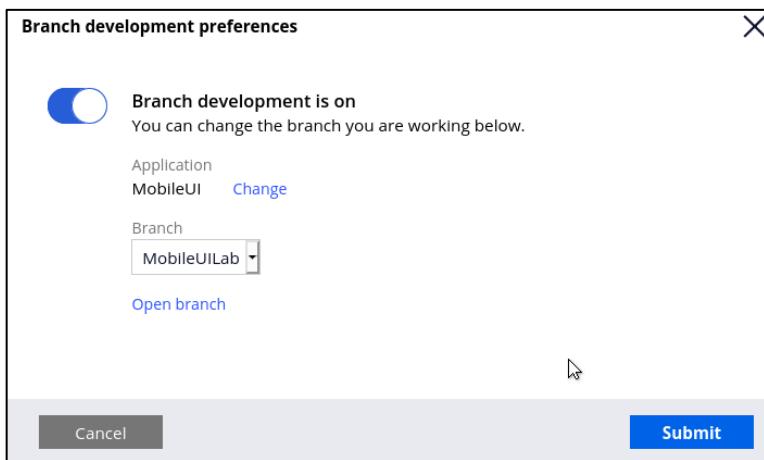
1. Log in and use the credentials **JOHN_UI@MOBILEUI** and **rules**.
2. Turn **Branch Development** ON, from the title bar click the **Toggle branch development** button.



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

N-4001
New Connection

Priority
20

Status
NEW
Created John_Ul@MobileUI less than a minute ago
Updated John_Ul@MobileUI less than a minute ago

Details

Pulse

Collect Customer Details

Customer

First Name * Test

Last Name * rrrrr

Full Name Test rrrrr

Date of Birth

Email ID * test@test.com

Phone number(if any)

Permanent Address

Door No. * 1-375

Area * Chandanagar

City * Hyderabad

State * Tamil Nadu

Pincode * 500050

Current Address

Door No. * 1-375

Area * Chandanagar

City * Hyderabad

State * Tamil Nadu

Pincode * 500050

Is Current Address same as Permanent Address?

Cancel Save Continue

- b. Click **Continue**
- c. Attach a file in the **Collect Address Proof** step

N-4001
New Connection

Priority
20

Status
NEW
Created John_Ul@MobileUI 5 minutes ago
Updated John_Ul@MobileUI about a minute ago

Details

Pulse

Create New Review Payment Fulfilment

Collect Address Proof

Address Proof * alloy-asphalt-auto-automobile

Attach

Download Delete

Back Save Continue

Is Current Address same as True Permanent Address?

Address Proof
alloy-asphalt-auto-automobile-241316

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.

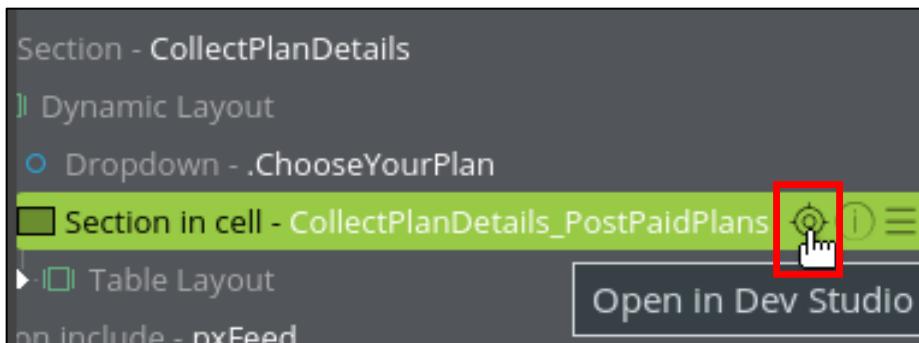
The screenshot shows the 'Collect Plan Details' view within a case. On the left, there's a sidebar with details like Priority (20), Status (NEW), and Created/Updated information. The main area has three steps: 'Collect Customer Details', 'Collect Address Proof', and 'Collect Plan Details'. The 'Collect Plan Details' step is active. A dropdown menu titled 'Choose your Plan *' is open, showing 'Post Paid' as the selected option. Other options include 'Select...', 'Pre Paid', and 'Post Paid' again. Below the dropdown, there's a note about address proof and a small image of a car.

4. In the **Developer Toolbar**, click **Live UI**, and then click the **CollectPlanDetails_PostPaidPlans** section.

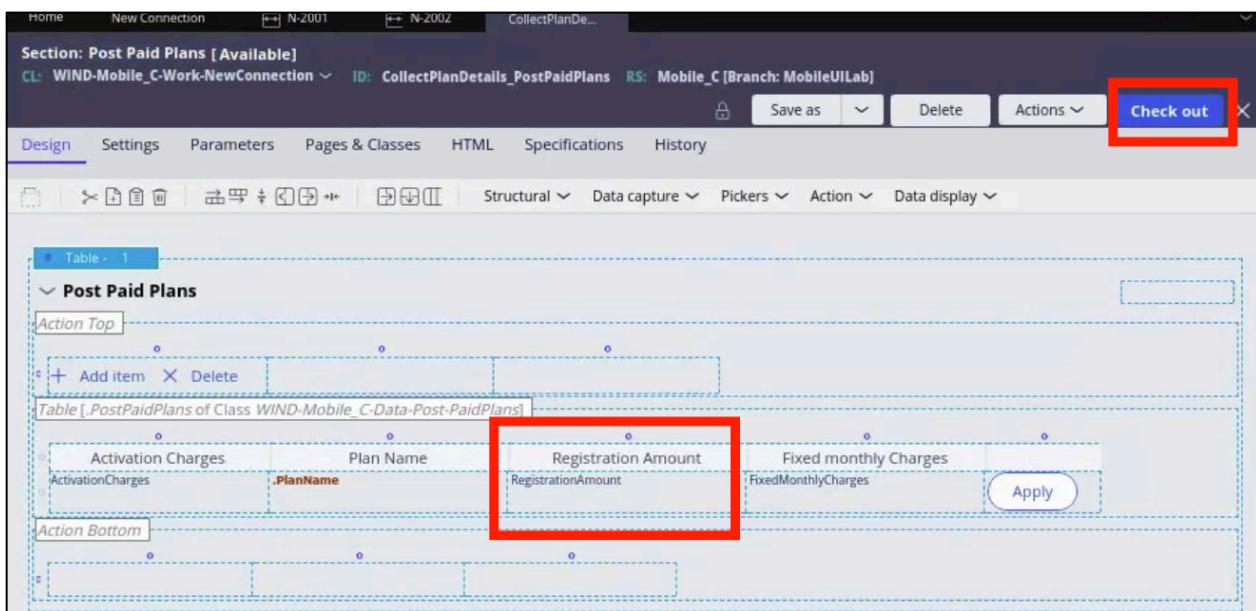
The screenshot shows the 'Live UI' tool in the developer toolbar. It displays the 'Collect Plan Details' view with the 'Post Paid Plans' section expanded. This section contains a table with three rows, each representing a plan: Plan 149, Plan 549, and Plan 849. The table columns are Activation Charges, Plan Name, Registration Amount, Fixed monthly Charges, and an Apply button. To the right of the Live UI window, a tree view shows the component hierarchy, including sections like 'Section in cell - CollectPlanDetails_PostPaidPlans' and 'Section in cell - CollectPlanDetails_PostPaidPlan'.

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.

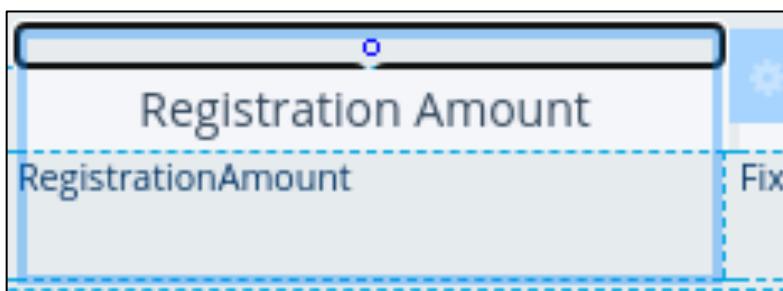
5. Click **Open in Dev Studio** to open the section rule in Dev Studio.



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**.

Column Properties

Width	210
Inline style	<input type="checkbox"/>
<input type="checkbox"/> Enable sorting	
Importance	Other

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.

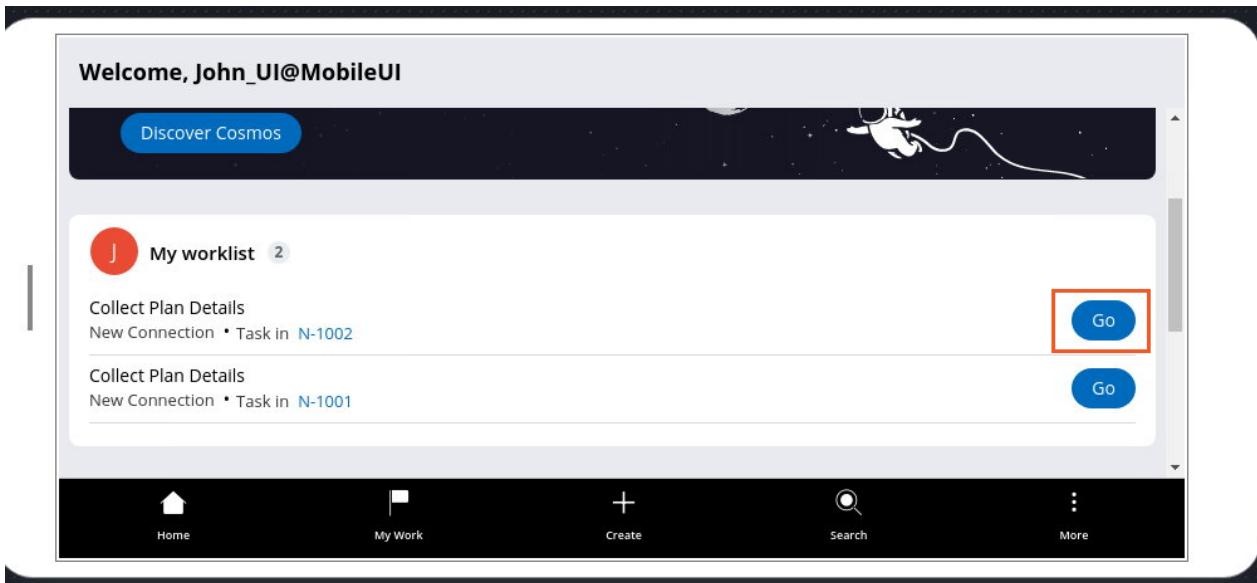
The screenshots show the Pega App Studio interface. The top screenshot displays the 'New Connection' case creation screen, showing a registration amount of \$149.00. The bottom screenshot shows the 'Collect Plan Details' step of the workflow, where the 'Post Paid' plan is selected, and three items are listed with their respective activation charges and plan names.

Activation Charges	Plan Name	Registration Amount	Fixed monthly Charges
1	\$100.00 Plan 149	\$0.00	\$149.00
2	\$100.00 Plan 549	\$0.00	\$199.00
3	\$100.00 Plan 849	\$0.00	\$249.00

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.

Activation Charges	Plan Name	Fixed monthly Charges
1	Plan 149	\$149.00
2	Plan 549	\$199.00
3	Plan 849	\$249.00

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 the app 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:

Task 1: Log in and turn on Branch Development

Task 2: Add new person and portal

Task 3: Configure navigation for the app menu

Task 4: Add actions for the Assistance Request cases

Task 5: Configure app name, description, and security

Task 6: Customize the app branding

Task 7: Verify your work

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

Detailed Steps

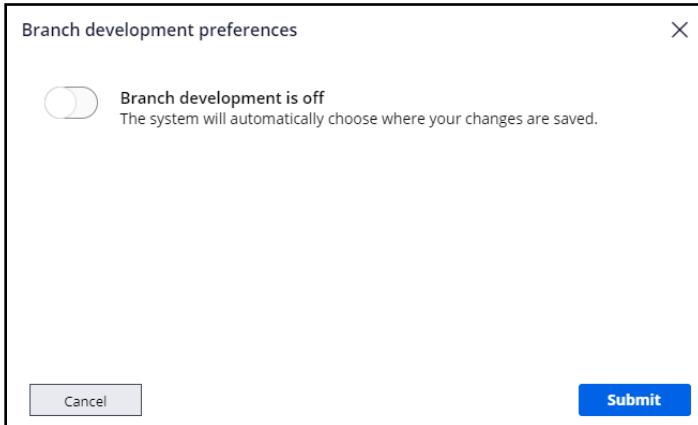
Task 1: Log in and enable branch development

1. Log in and use the credentials **author@mobilechannel** and **rules**.

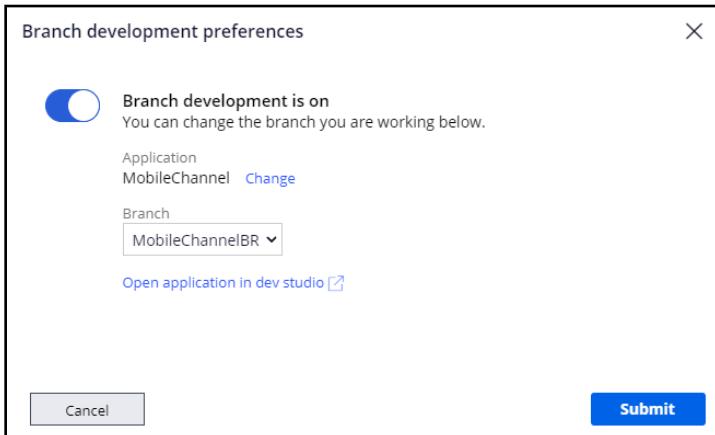
1. Turn **Branch Development** ON, from the title bar click the **Toggle branch development** button.



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**.

New persona

Persona name *

Description

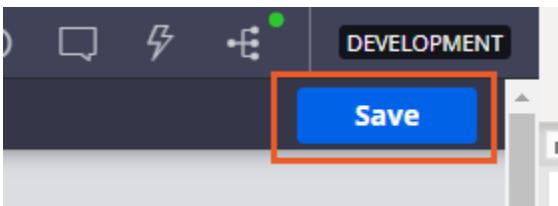
- On the **Portals & pages** tab set the **Default channel** to **User Portal**.

User management

Personas People Portals & pages

Name	All personas	User2
Portals		
Default channel	User Portal	
User Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click **Save**.



Task 3: Configure navigation for the app menu

- In the navigation pane of **App Studio**, click **Channels** to access the multi-channel configuration.
- In the **Current channel interfaces** section, click **User Mobile App** to begin working on the mobile application.

Current channel interfaces

User Portal Default employee-facing portal for Cosmos Rules applications. Use the Interfaces landing page to edit this portal and add/remove pages.	API APIs are a set of REST services exposed by the application, including the Pega API - a set of built-in REST services for Pega applications
User Mobile App Pega Mobile Client	

3. Click **Enable it**.

Mobile interface: Default Mobile

Your connection to this site is not secure. Build and preview options not available.

The "Mobile" Authentication Service is currently disabled. It is not possible to login to the system from mobile applications. [Enable it](#)

4. In the **Navigation** section, to the right of + **Create case**, click the **Gear** icon to change the settings.

Navigation

		Start page	Settings	Delete
Home				
My Cases				
+ Create case				
Notifications				
Log off				

5. Select only the **Assistance Request** check box and click **Submit** to close the dialog box.

Edit Action

Action Name *

Create case

Icon

+ Change

Case types

Assistance Request

Service

Cancel

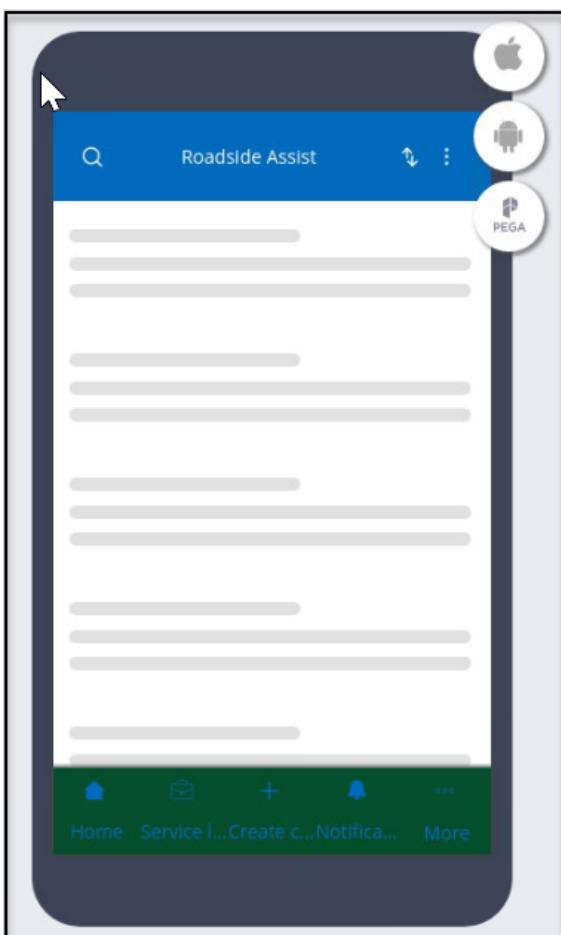
Submit

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

Navigation		
Home		Start page  
Service list		 
Create case		 
Notifications		 
Log off		 
+ Add		

10. Click **Save**

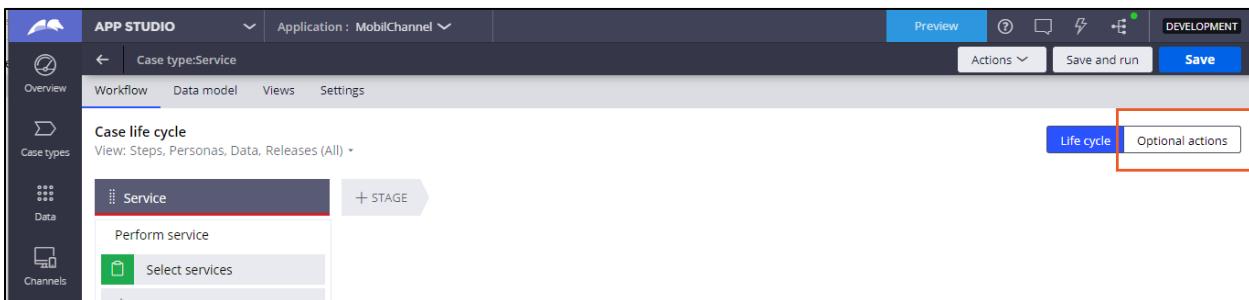
11. In the mobile app preview, confirm that the bottom navigation has only four options.



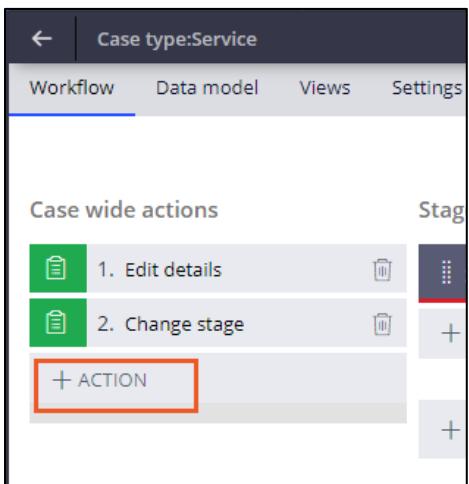
Task 4: Add actions for the Service Request cases

- In the navigation pane of **App Studio**, click **Case Types**. Select the **Service** case type.

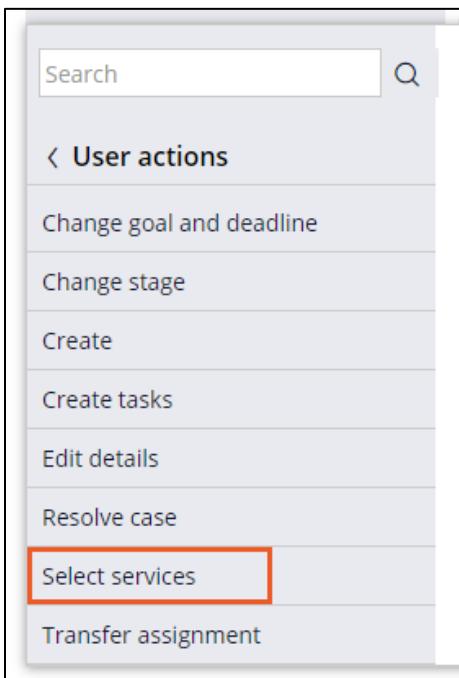
2. Click **Optional actions**.



2. Click **+Action** to add a case wide action.



3. In the **User actions** list, select **Select services**.



4. Click **Save**.

- In the navigation pane of **App Studio**, click **Channels** to access the multi-channel configuration.
- In the **Current channel interfaces** section, click **User Mobile App** to begin working on the mobile application.
- On the Content tab, click **List pages**, and then **Service list** to access the Service list page settings.
- 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

Swipe actions

Right side actions

⋮

[+ Add](#)

Left side actions

⋮ **Follow**

[+ Add](#)

- In the **Left side actions** section, click **Add**, and then **Select services** to add the swipe action.
- To the right of **Select services**, click the **Gear** icon to open the **Edit settings** dialog box.
- In the **Edit settings** dialog box, click **Change** to access the Icon class picker window.
- In the **Icon class picker** window, in the **Search** field, enter pi-list.
- In the **Icon class picker** window, select the **pi-list** icon, and then click **Submit** to close the **Edit settings** dialog box.

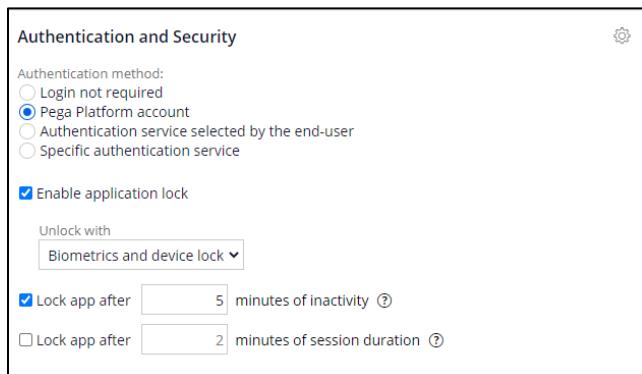
Edit action

Action name

Icon

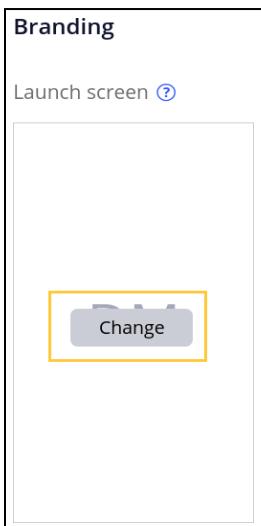
Task 5: Configure app name, description, and security

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

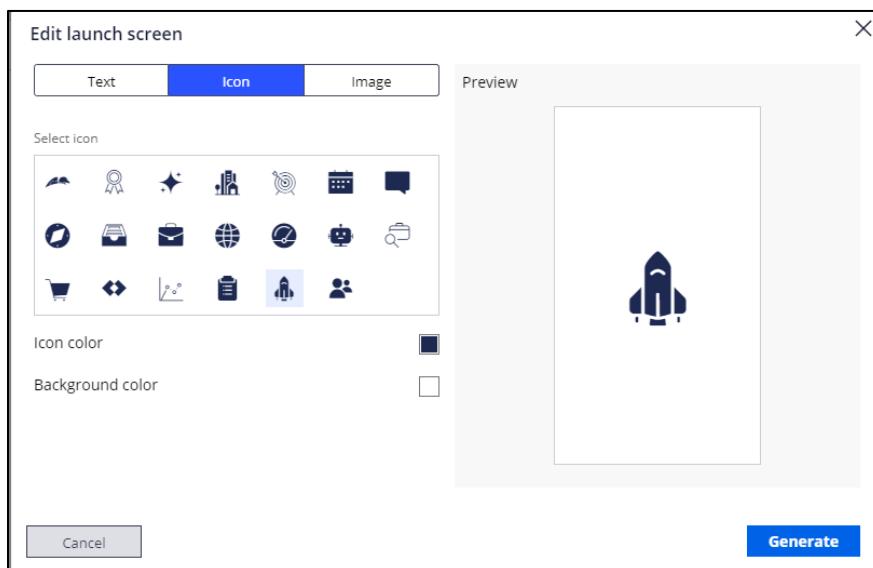


Task 6: Customize the app branding

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.

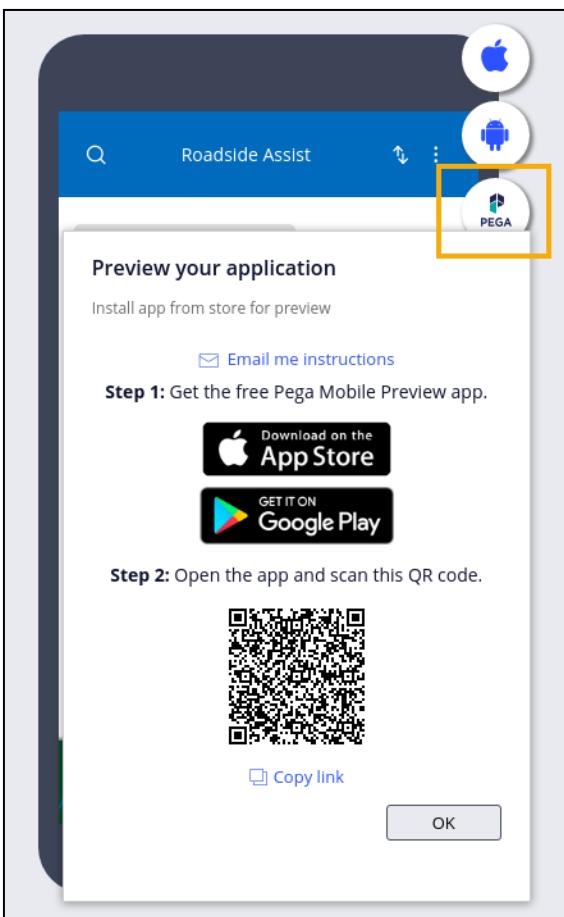
The screenshot shows the 'Theme' configuration window in App Studio. On the left, there are settings for 'Bottom menu style' (set to 'Icons and text'), 'Floating action button position' (set to 'Center'), and a checkbox for 'Enable auto hiding bars on scroll'. Below these are 'Mobile specific colors' settings for various UI elements like header background, bottom navigation, and different types of buttons. On the right, a mobile application preview is shown on a virtual device. The app has a blue header with 'Header' and a Pega icon. The main screen contains 'Headings' and some text. At the bottom is a navigation bar with icons for Home, My Cases, Create, Notifications, and More.

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 configured 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.

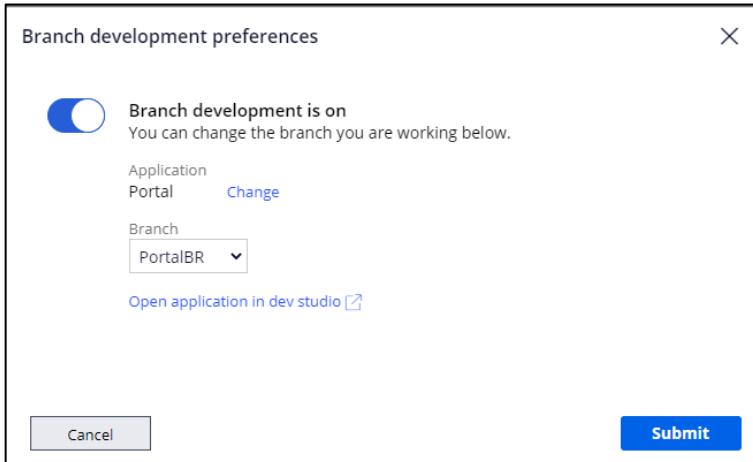
Detailed Steps

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**.

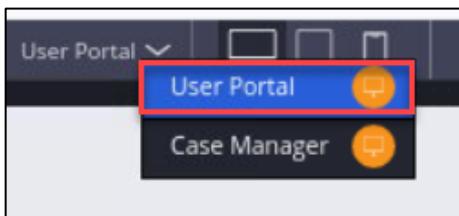


Task 2: Generate a navigation menu for a portal

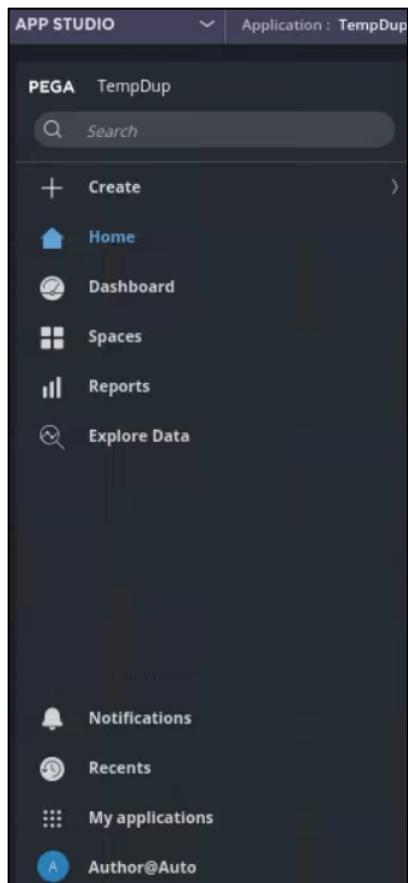
1. In **App Studio**, click **Preview** to preview the application.



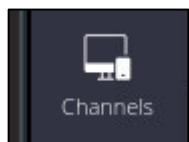
2. Select the **User Portal**.



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**.

The screenshot shows the 'Current channel interfaces' section of the App Studio Channels interface. The 'User Portal' channel is highlighted with a red box. Other channels listed include User Mobile App, Case Manager (deprecated), and API.

Channel	Description
User Portal	Default employee-facing portal for Cosmos Rules applications. Use the Interfaces landing page to edit this portal and add/remove pages.
User Mobile App	Pega Mobile Client
Case Manager	This rule is DEPRECATED
API	APIs are a set of REST services exposed by the application, including the Pega API - a set of built-in REST services for Pega applications

6. The below screen appears to add new pages to the **Navigation menu**.

The screenshot shows the APP STUDIO interface with the application set to 'Portal'. The left sidebar includes options like Overview, Case types (Data, Channels, Explore Data), Users, Settings, and a search bar. The main content area is titled 'Navigation' and contains two sections: 'Navigation menu' and '"Create"' menu. The 'Navigation menu' section lists items: Home, Dashboard, Spaces, Reports, Configuration, and Explore Data, each with edit and delete icons. Below this is a note: 'The first item in the list will be your start page'. The 'Create' menu section lists 'Evaluate and Sell a Vehicle' with an edit icon. At the bottom of the navigation menu section are '+ Add item' and '+ Add separator' buttons. To the right, a preview window shows the updated navigation menu with the new item added.

7. In the **Navigation** section, click on the **Add item** button.

This screenshot shows the 'Navigation' configuration screen. The 'Navigation menu' section displays a note: 'The first item in the list will be your start page' and a message: 'No pages added for navigation'. A red box highlights the '+ Add item' button at the bottom of the list.

8. In the list of existing pages, **select 4 pages** to add to the menu.

Navigation

The screenshot shows the navigation configuration interface. On the left, there is a sidebar with a list of items: Administration, Cases in Tree, Dashboard tab of Case Manager portal, Documents, Evaluate and Sell a Vehicle, My Work, Pulse, RV Calculation, Tags, and Teams. At the bottom of this list are two buttons: '+ Add item' and '+ Add separator'. To the right of the sidebar is a preview area titled 'page' which displays a list of items with icons and three-dot menus.

Item	Icon	... Menu
Administration	document	
Cases in Tree	document	
Dashboard tab of Case Manager portal	document	
Documents	document	
Evaluate and Sell a Vehicle	document	
My Work	document	
Pulse	document	
RV Calculation	document	
Tags	document	
Teams	document	

9. In this example, we picked **Teams**, **Pulse**, **Administration**, and **My Work** from the list.

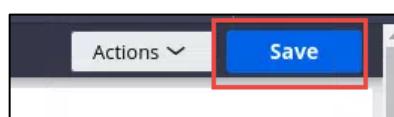
The screenshot shows the navigation configuration interface with the following lists:

- Navigation menu:** Home, Dashboard, Spaces, Reports, Configuration, Explore Data, Teams, Pulse, Administration, My Work. Below this list are '+ Add item' and '+ Add separator' buttons.
- "Create" menu:** Evaluate and Sell a Vehicle. Below this list are '+ Add item' and '+ Add case type' buttons.

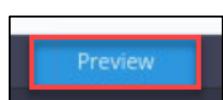
To the right is a 'Preview' window showing the final navigation menu structure:

- PEGA Portal
- + Create
- Home
- Dashboard
- Spaces
- Reports
- Configuration
- Explore Data
- Teams
- Pulse
- Administration
- My Work

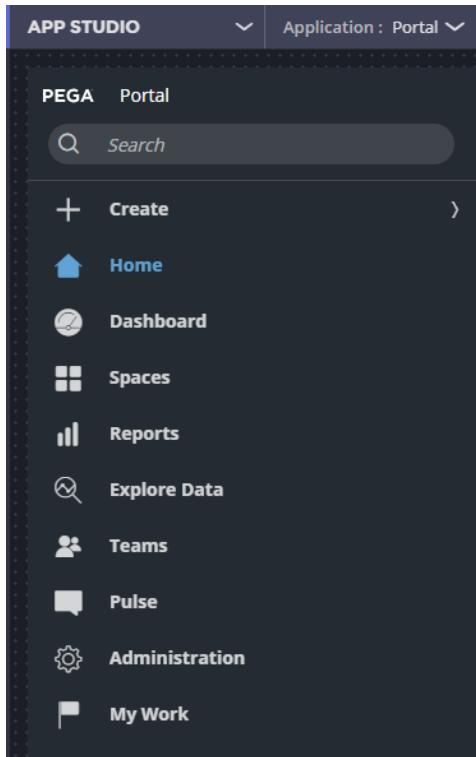
10. Click **Save**.



11. Click **Preview**.

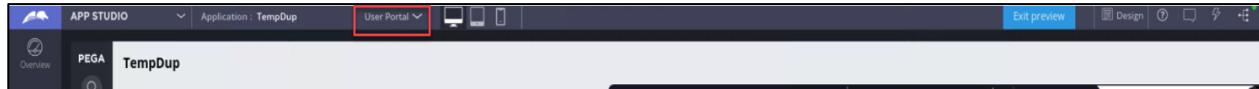


12. Note the menu has the pages you identified.

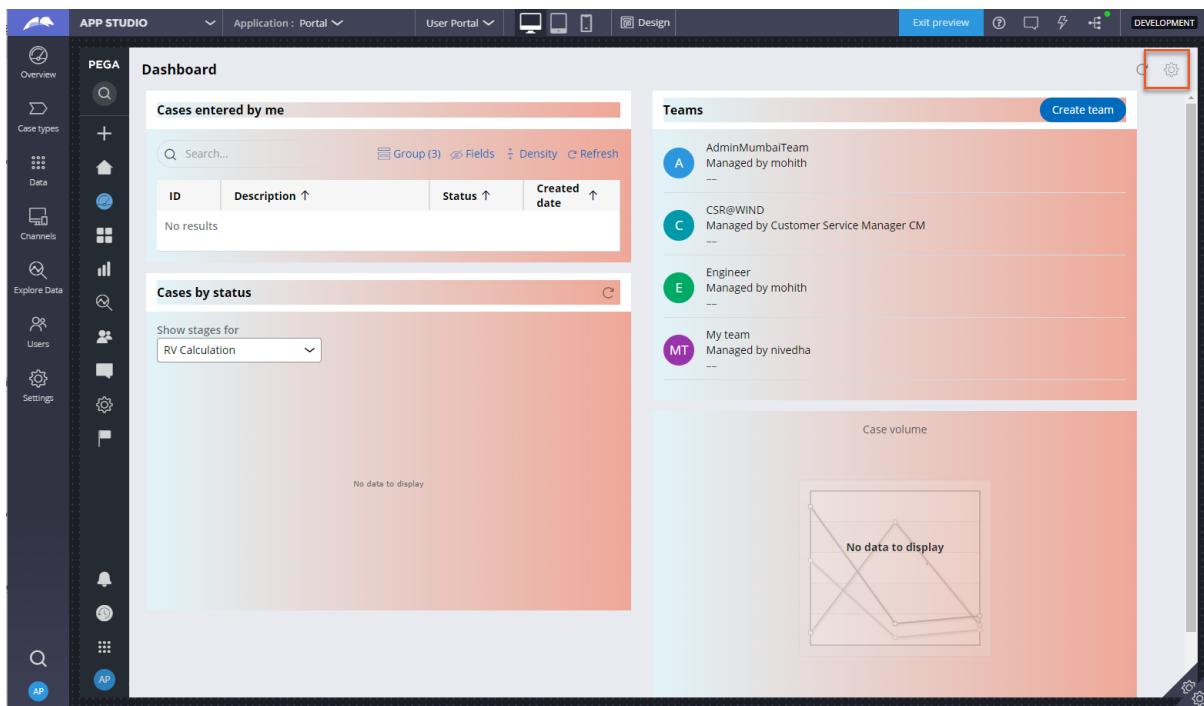


Task 3: Modify the Dashboard

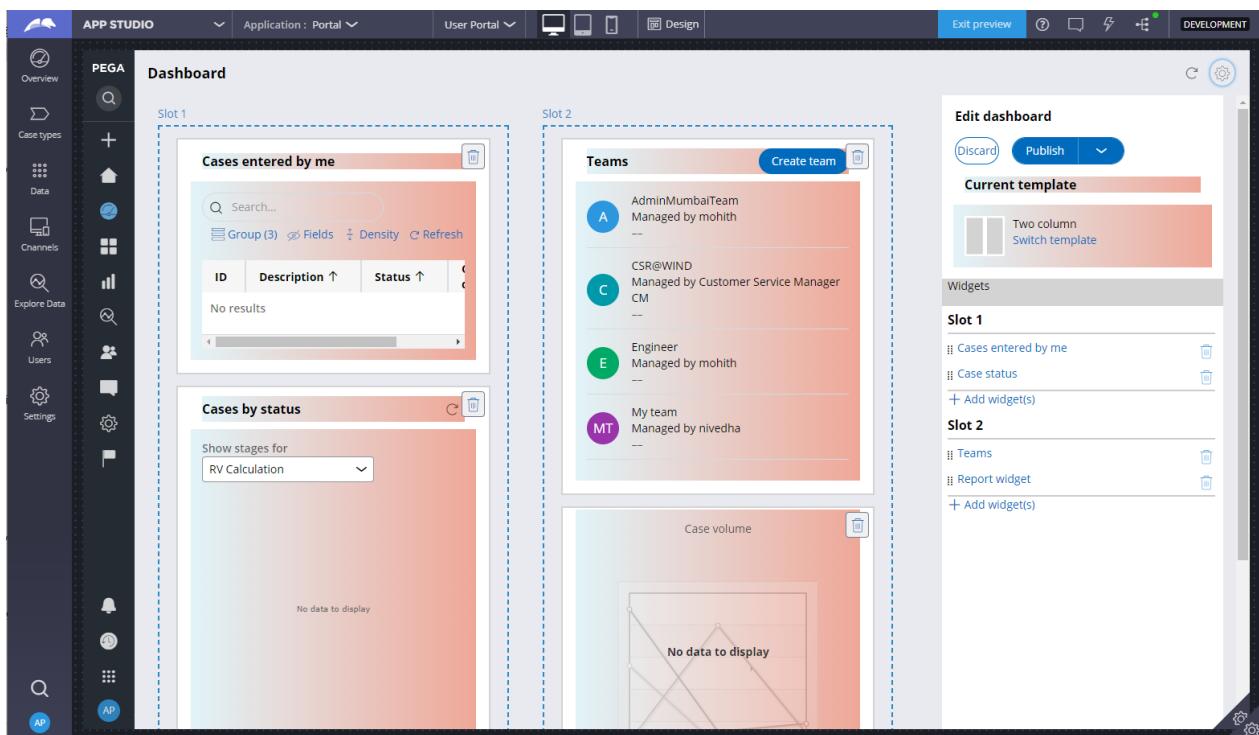
1. Confirm you are still in **App Studio** in **Preview** for the User Portal.



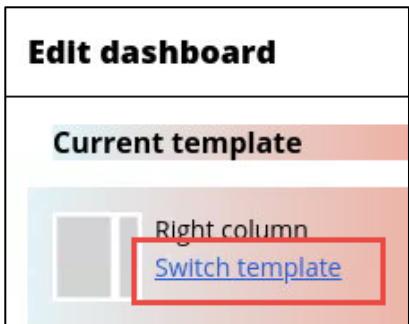
2. Click on **Dashboard** in the **left hand navigation pane**. In the **User Portal Header Workspace**; click on the personalize icon in the **Dashboard**.



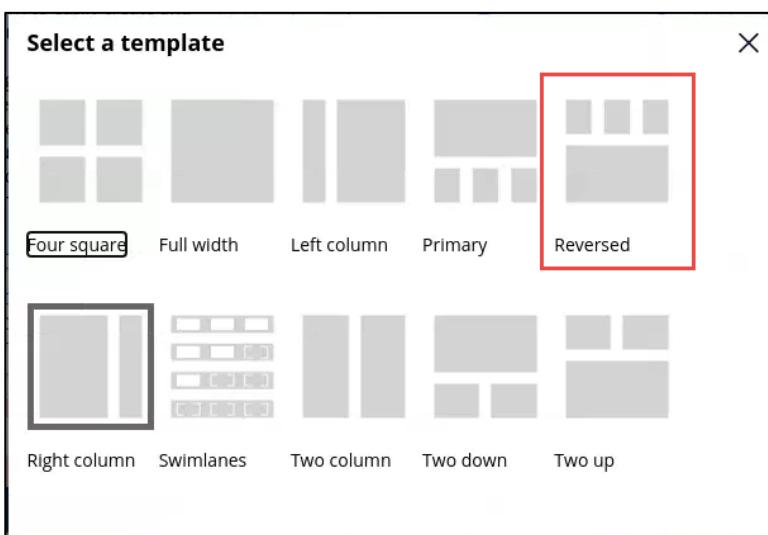
3. You will see the following:



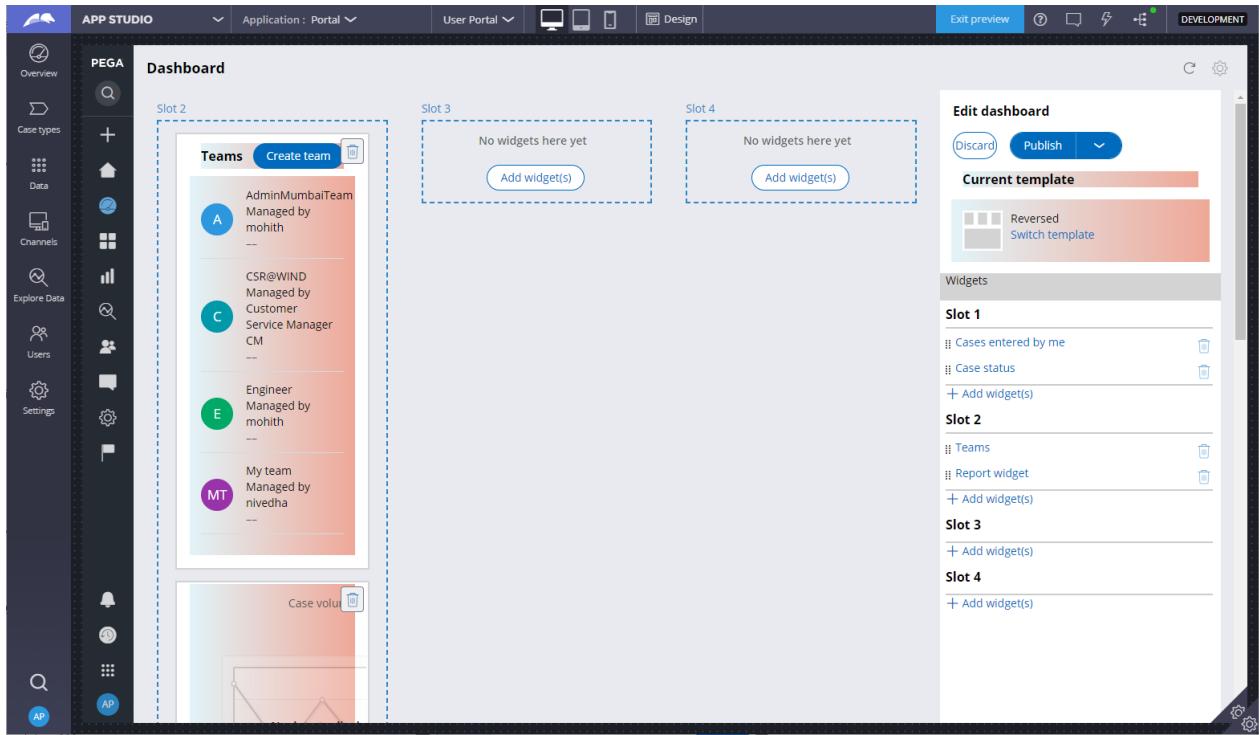
4. In the **Edit dashboard** panel, click **Switch template**.



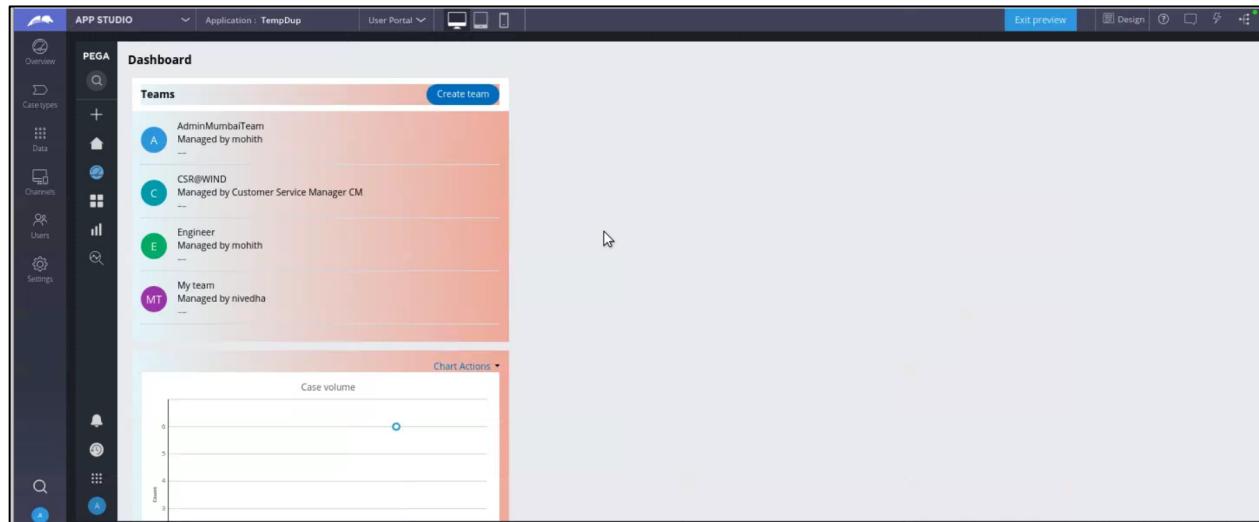
5. In the **Select a template** window, review the template preview and then select the template that you want to use. The template previews include the numbers, sizes, and relative positions of slots that they contain. For this example, select **Reversed**.



6. You will see the following:



7. Since we are just testing the impact of changing templates on the appearance, click **Publish**.

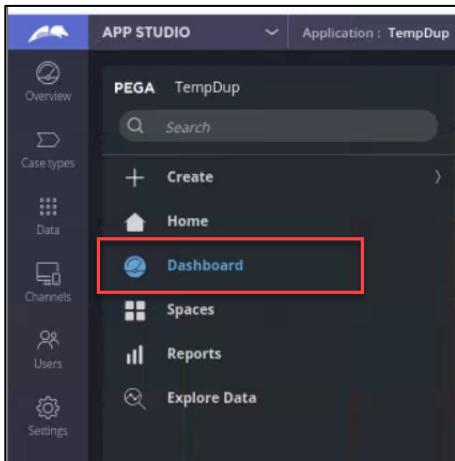


NOTE: Users see an updated version of the dashboard when they log on to your application. As a team manager, you can publish your dashboard to share it with your team. By providing a baseline layout with commonly used tools, you can help team members save time while they set up their environment.

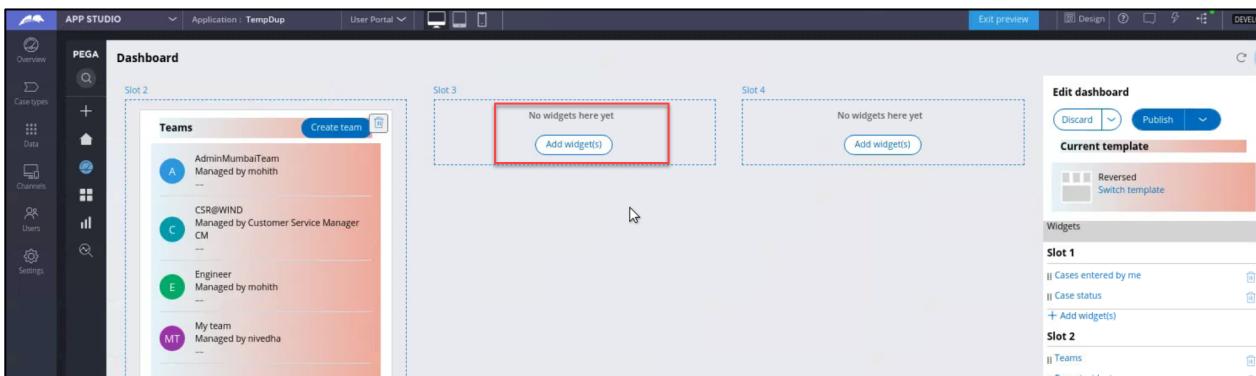
Task 4: Add a widget to the dashboard

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.

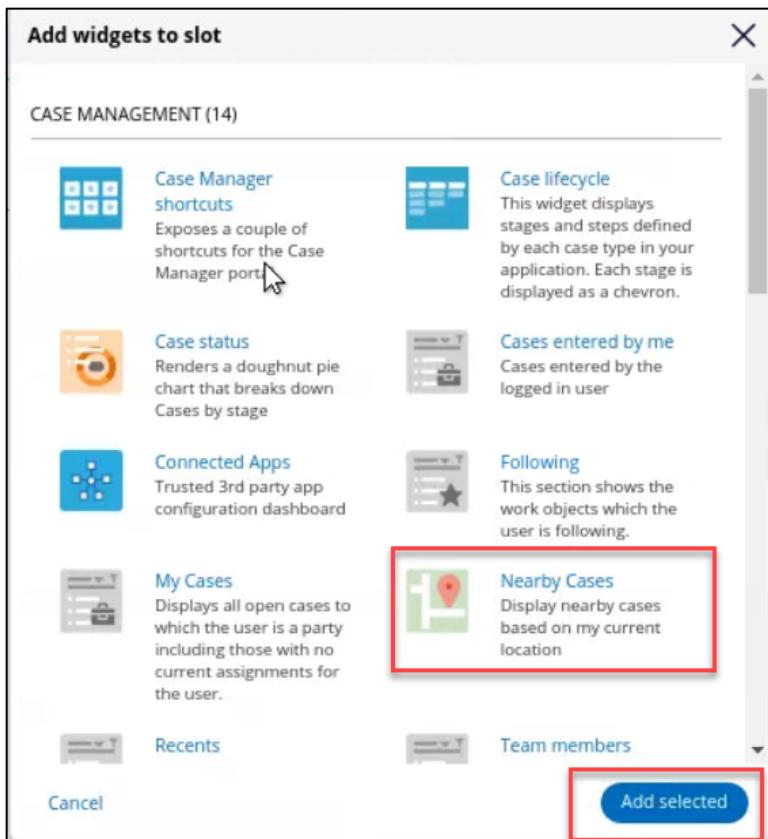
1. If you are not in the (User portal) **Dashboard** already then in the navigation menu of User Portal, click **Dashboard**.



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.

The screenshot shows the dashboard editor interface. The dashboard has four slots:

- Slot 2**: Contains a "Teams" widget.
- Slot 3**: Contains a "Nearby Cases" widget, which displays a map of Boston with pins indicating nearby cases.
- Slot 4**: Contains a placeholder message "No widgets here yet" and a "Add widget(s)" button. A red box highlights this area.

On the right side of the dashboard, there is an "Edit dashboard" sidebar. In the "Current template" section, there is a "Reversed" template selected. In the "Edit widget: Nearby Cases" section, there are dropdown menus for "Choose Case Type" (set to "Select") and "Select Location Property" (set to "Select"). At the bottom of this panel are "Cancel", "Preview", and "Save" buttons. A red box highlights this configuration panel.

6. Click **Publish**.

The screenshot shows the Pega APP STUDIO interface for the application 'TempDup'. The top navigation bar includes 'APP STUDIO', 'Application : TempDup', 'User Portal', and 'Exit preview'. The left sidebar has sections for Overview, Case types, Data, Channels, Users, and Settings, each with corresponding icons. The main content area is titled 'Dashboard'.

Teams

- A AdminMumbaiTeam Managed by mohith
- C CSR@WIND Managed by Customer Service Manager CM
- E Engineer Managed by mohith
- MT My team Managed by nivedha

Chart Actions

Case volume

Count	Value
0	0
1	1
2	2
3	3
4	4
5	5

Nearby Cases

Display cases within 50 Miles Range

Map showing Boston City Hall, State Street, and surrounding areas. A legend indicates 'Nearby Hospital' and 'Key Page'. The map also shows landmarks like the Massachusetts State House, Boston Common, and the Waterfront.

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

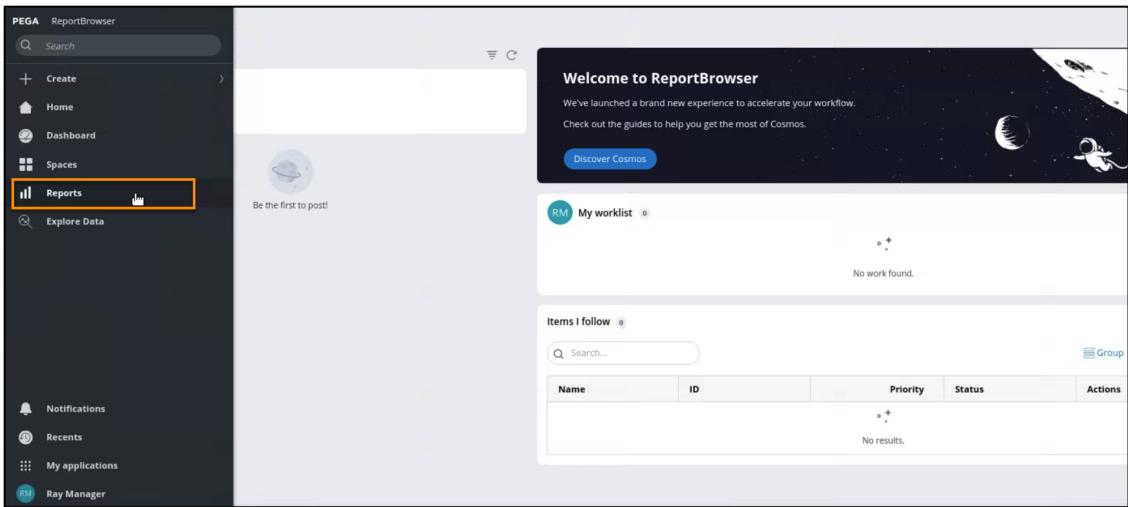
Investigate the report.

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.

The screenshot shows the "All Reports" page. At the top, there's a header "Reports" and a sub-header "MY REPORTS (0) ALL REPORTS (47)". Below this is a search bar and a dropdown menu. The main area is titled "Showing all reports" and displays a grid of 14 report cards. Each card includes a thumbnail icon, a title, and a timestamp. The reports are categorized as follows:

- Row 1: CustomerInfo (Summary, 10mo ago), List of continuous models (List, 2y 9mo ago), List of categorical models (Summary, 2y 9mo ago), List of binary models (Summary, 2y 9mo ago), Latest performance per (List, 2y 9mo ago).
- Row 2: Elapsed Status Time Trend (Line chart, 2y 9mo ago), Work Object Status Tracking (List, 2y 9mo ago).
- Row 3: Work average (Donut chart, 2y 9mo ago), Performance step (Bar chart, 2y 9mo ago), Throughput In (Bar chart, 2y 9mo ago), List of processes (List, 2y 9mo ago), Process Status For (Donut chart, 2y 9mo ago), List of processes (List, 2y 9mo ago), Effort by (Bar chart, 2y 9mo ago).

5. Click the drop-down and review the available categories.

Reports

MY REPORTS (0) ALL REPORTS (47)

Search a report by title or des Q All reports

Showing all reports

Analyze Performance
Analyze Quality
Case Metrics
Monitor Assignments
Monitor Processes
Open Cases
Predictive Model Monitoring
Service Level Performance
Step Performance

Summary CustomerInfo 10mo ago

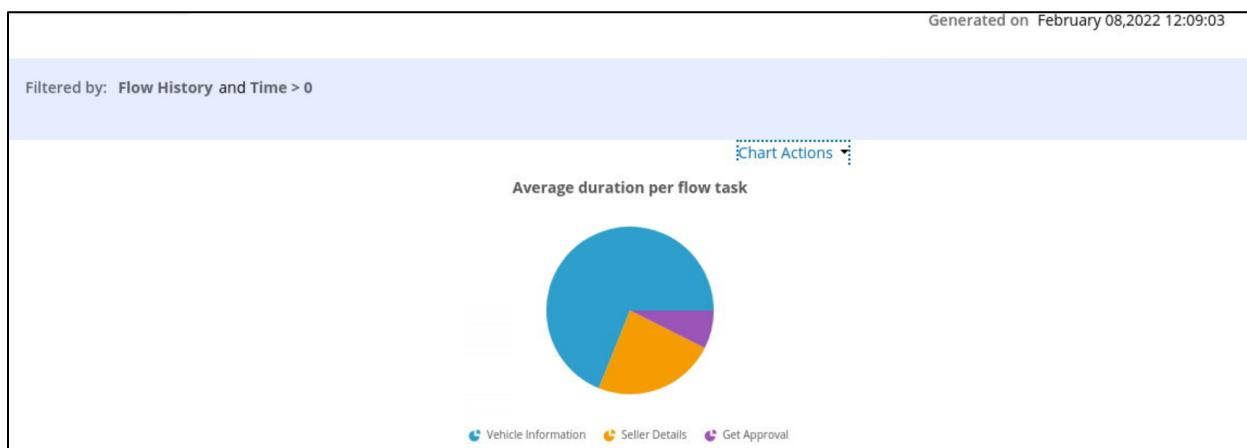
Summary List of continuous models 2y 9mo ago

Summary List of categorical models 2y 9mo ago

Summary List of binary models 2y 9mo ago

List Latest performance per 2y 9mo ago

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.

Group all group headings		Avg Duration	work IDs
Task	~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.

Average duration per flow task (detail)			
Average duration per flow task > Wait For 45 Days			
Filtered by: Task Name = Wait For 45 Days and (Elapsed Task Time Is not null or Elapsed Task Time Is not null) and (Flow History and Time > 0)			

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

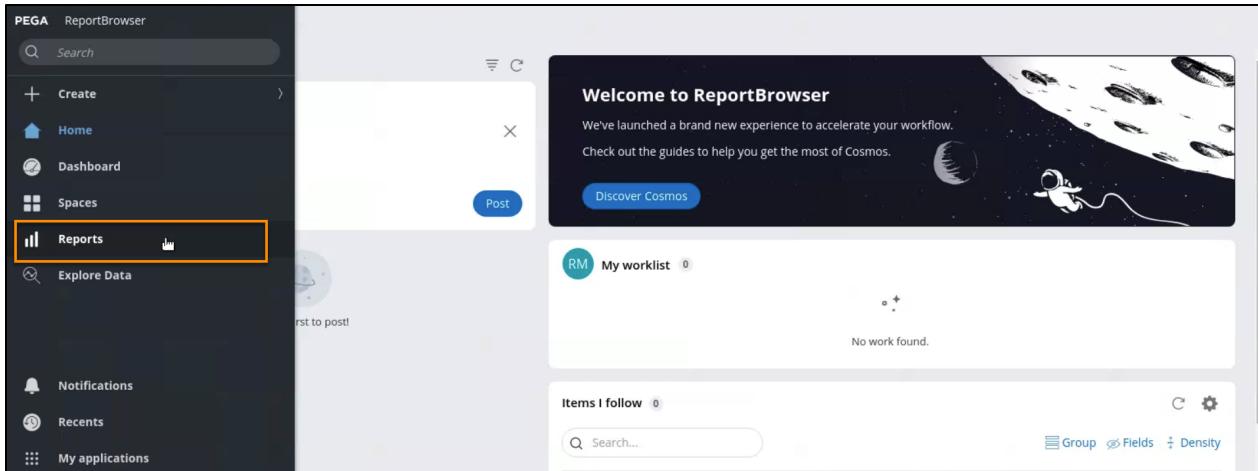
Create a new report.

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.

The screenshot shows the 'Reports' page in the PEGA ReportBrowser. The left sidebar has a 'Reports' icon highlighted with an orange box. At the top right, there are 'Actions' and 'New report' buttons. The main area displays a report card for 'Average duration per flow task' and a list of reports. A 'New report' button is highlighted with an orange box at the bottom right of the page.

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.

The screenshot shows the 'Create new report' dialogue box. It has two dropdown fields: 'Case type *' set to 'Sell Vehicle' and 'Report type *' set to 'List'. At the bottom are 'Cancel' and 'Submit' buttons. The 'New report' button from the previous screenshot is highlighted with an orange box.

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**.

The screenshot shows the 'Item Details' report being edited. The left pane is the 'Data Explorer' with various properties listed under 'Sell Vehicle'. A yellow arrow points from the 'Create Operator Name' property in the Data Explorer to the 'Case ID' column header in the report results pane. A red circle labeled 'A' is on the title bar, and a red circle labeled 'D' is on the filter bar. A yellow box labeled 'E' indicates where to drop a column.

- 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**.

The screenshot shows the 'Edit filter' dialog box. The 'Value' field contains 'Current Year' and has a red box around it. The 'Select values' button next to it is also highlighted with a red box. Other fields in the dialog include 'Update Date/Time' (set to 'Is equal' with 'Current Year'), 'Filter Caption' (set to 'Current Year'), and checkboxes for 'Use null if empty' and 'Ignore case'.

- 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.

Done editing Actions ▾

Generated on April 14,2021 15:25:44

To add columns: Drag-and-drop a column from the Data Explorer next to a column heading to add it to the report. Drag-and-drop a function from the Calculations tab of the Data Explorer to define a calculated column.

Next hint

Filtered by: Previous year

Drop column to add Filter

Actual data Simulated data

Displaying 6 records

Label	Create Operator Name	Case ID	Entered on	Case Status
Sell Vehicle	Henry Reporting	S-1005	7/14/20	Pending
Sell Vehicle	Application Developer CM	S-1	7/1/20	Resolved-Completed
Sell Vehicle	Henry Reporting	S-1002	7/14/20	Pending
Sell Vehicle	Henry Reporting	S-1003	7/14/20	Pending
Sell Vehicle	Henry Reporting	S-1004	7/14/20	Pending
Sell Vehicle	Henry Reporting	S-1001	7/10/20	Pending-Fulfillment

Done editing Actions ▾

Generated on April 14,2021

To add columns: Drag-and-drop a column from the Data Explorer next to a column heading to add it to the report. Drag-and-drop a function from the Calculations tab of the Data Explorer to define a calculated column.

Next hint

Filtered by: Previous year

Drop column to add Filter

Actual data Simulated data

Displaying 5 records

Label	Create Operator Name	Case ID	Entered on	Case Status
Label1	Create Operator Name1	Case ID1	4/14/21	Case Status1
Label2	Create Operator Name2	Case ID2	4/14/21	Case Status2
Label3	Create Operator Name3	Case ID3	4/14/21	Case Status3
Label4	Create Operator Name4	Case ID4	4/14/21	Case Status4
Label5	Create Operator Name5	Case ID5	4/14/21	Case Status5

5. Click **Done Editing** to save the report in **My Reports**. Click **Submit** to save the report.

Save report as

Title *****
Sell vehicle cases in 2022

Description
Sell Vehicle

Category *****
My reports

[Cancel](#) [Submit](#)

- 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.

Sell vehicle cases in 2022

[Edit report](#) [Actions](#)

Generated on February 08,2022 12:34:15

Filtered by: [Current year](#)

Displaying 3 records

Label	Create Operator Name	Case ID	Entered on	Case Status
Sell Vehicle	Ray Manager	S-2	2/7/22	In Build
Sell Vehicle	Ray Manager	S-3	2/7/22	Pending
Sell Vehicle	Ray Manager	S-1	2/7/22	Pending

Tip: An alternate way to close the report is to click on **Reports** from the left navigation to view the report browser.

- The report browser will now show a report in the **My Reports** tab.

Reports

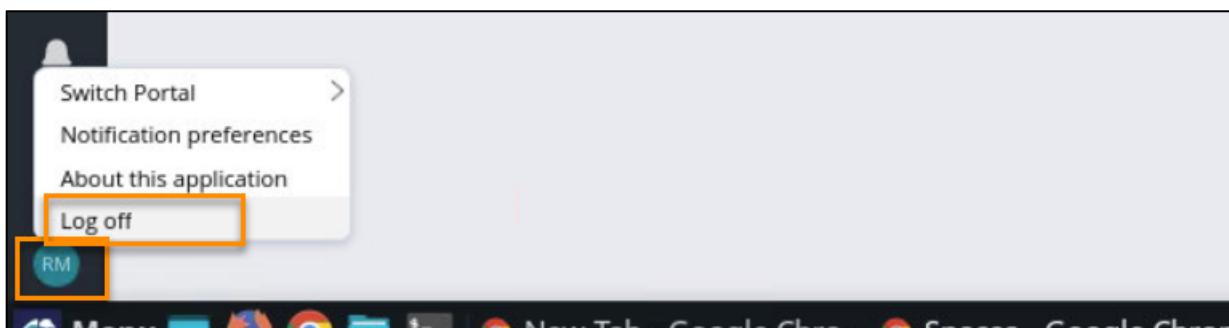
[Actions](#) [New report](#)

 Sell vehicle cases in 2022 3m ago	 Average duration per flow task 3y ago
--	--

[MY REPORTS \(0\)](#) [ALL REPORTS \(47\)](#) [Recently updated](#)

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.

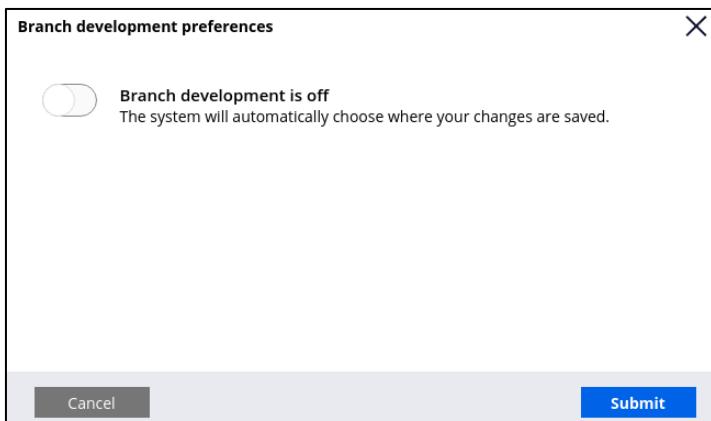
Task 4: Test the users

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

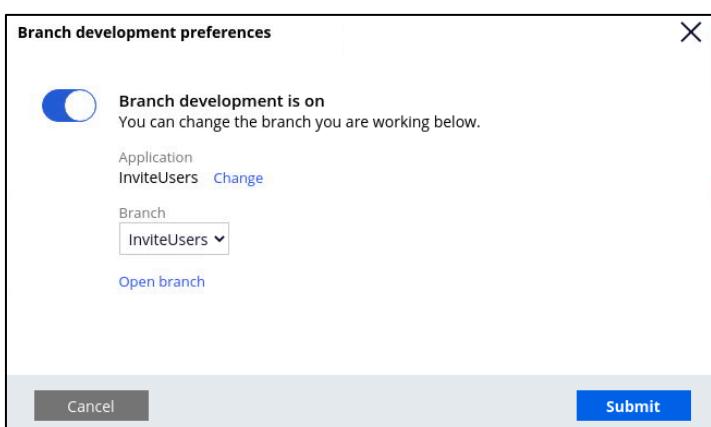
Detailed Steps

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.



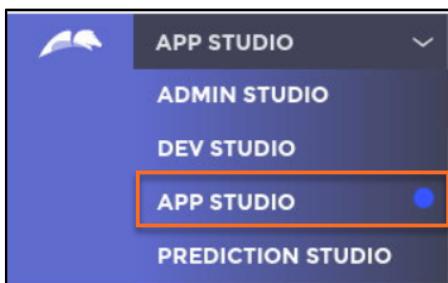
Move the slider to the right and ensure that the **InviteUsers** branch is selected.



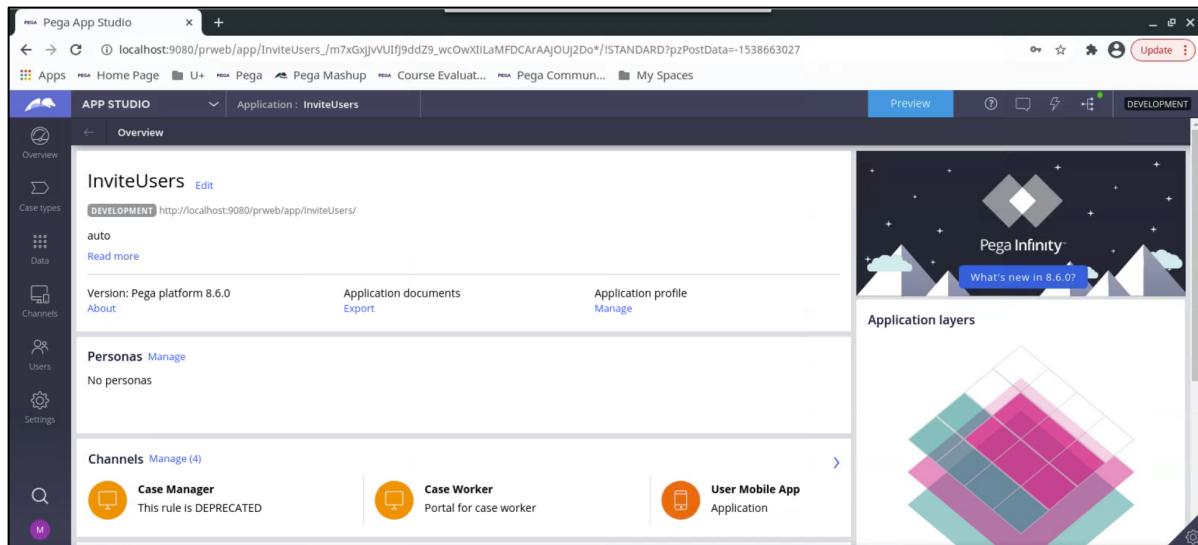
4. Click **Submit**.

Task 2: Configure persona and access

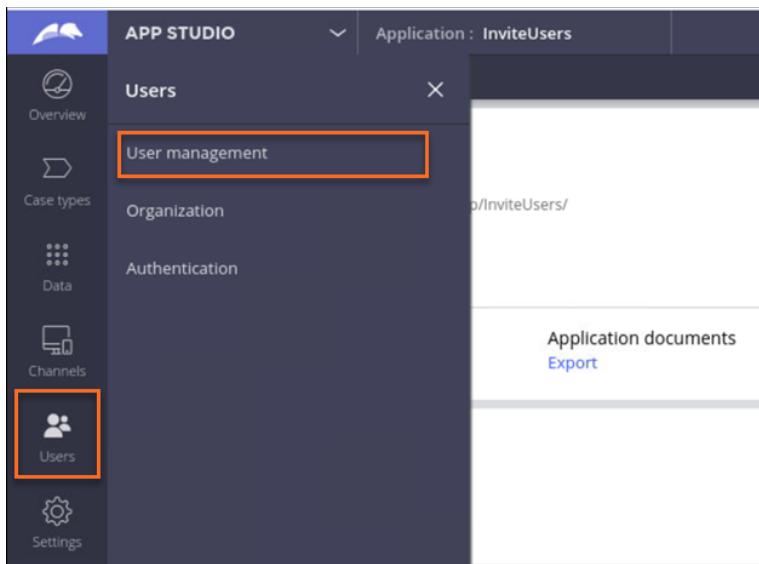
As an Administrator Engineer operator create two personas and configure access.



1. Click the **Start now** button on the **One journey at a time** window to 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:

The screenshot shows the Pegasystems App Studio interface with the application 'InviteUsers' open. The left sidebar has icons for Overview, Case types, Data, Channels, Users, and Settings. The main area has tabs for Personas, People, and Portals & pages. The Personas tab is active. A search bar at the top says 'Search personas...' with '1 persona' results. Below is a table with three columns: Persona (Administrator), Channels (User Portal), and Users (1 user). An 'Add' button is highlighted with a yellow box.

4. Click **Add**. The following appears:

New persona

Persona name *

Description

Cancel Submit

5. Enter **CSRS** for the **Persona name** and **CSR Supervisor** for the **Description**.

New persona

Persona name *

CSRS

Description

CSR Supervisor

Cancel Submit

6. Click **Submit**. The new persona appears.

- Click **Add** button and add a second persona named **CSS** with a **Description** set to **Customer Self-Service**. The following appears:

- Click the left arrow before **User management** to return to the overview window.
- Select **Users > User management** and then click on **Portals & pages** tab.
- The following appears:

Name	All persons	Administrator	CSRS	CSS
Portals				
Default channel	Select	Select	Select	
User Portal	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pages				
Administration	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Cases in Tree	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Configuration	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Dashboard tab of Case Manager portal	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Documents	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate and Sell a Vehicle	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Explore Data	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Home	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
My Work	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Pulse	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>
Reports	<input checked="" type="checkbox"/>	-	<input type="checkbox"/>	<input type="checkbox"/>

- For CSRS set the **Default channel** as **User Portal**.
- 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:



User management

Personas People Portals & pages

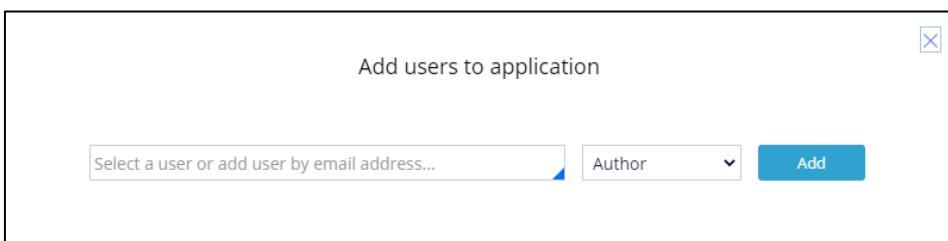
Name Persona / Developer role

mohith Administrator

X Invite people to your application

Save

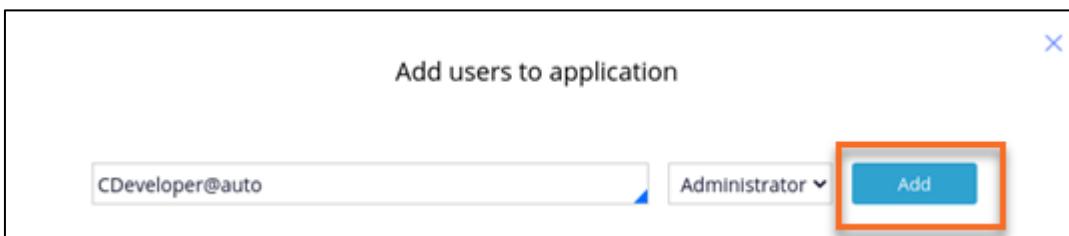
2. Click **Invite people to your application** link. The following appears:



Add users to application

Select a user or add user by email address... Author Add

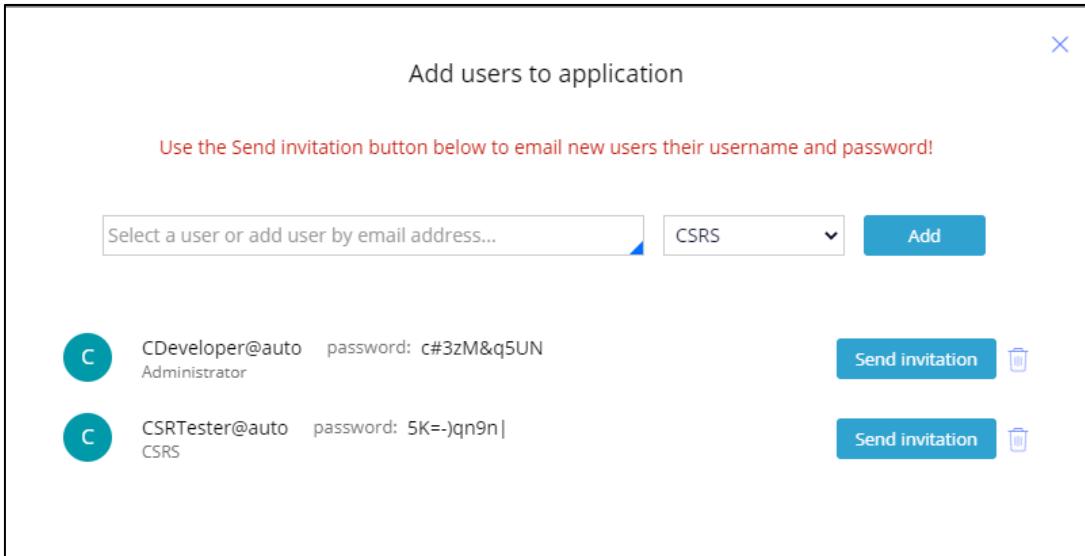
3. Enter **CDeveloper@auto** for the email address and select **Administrator** in the drop-down next to the field. **Click Add**.



Add users to application

CDeveloper@auto Administrator 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.

APP STUDIO Application: InviteUsers

User management

Personas People Portals & pages

Name Persona / Developer role

CDeveloper	Administrator
CSRTester	CSRS
mohith	Author

Invite people to your application

7. From the title bar, select **Dev Studio** to switch to Dev Studio.
8. Select **Configure > Org & Security > Organization > Operators**. The following appears:

Organization and Security: Organization

Operators Organizational Chart

Search Text: Search Clear Search

New ...

Full Name	Operator ID	Job Position/Title
AES Remote User	aesremoteuser	

9. In the **Search Text** field, enter **CDeveloper@auto** and click **Search**. The user is located.

Organization and Security: Organization

Operators Organizational Chart

Search Text: Search Clear Search

New ...

Full Name	Operator ID	Job Position/Title
CDeveloper	CDeveloper@auto	

10. Click the row to open the **Operator** record and select the **Security** tab.

Edit Operator ID: CDeveloper
ID: CDeveloper@auto RS: InviteUsers [Edit]

Delete Actions Save X

Profile Work **Security** History

Access Settings

Update password

This is an unattended operator (robot)

Allow rule check out

Use external authentication

Force password change on next login

Disable Operator

Starting activity to execute

License type

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**.

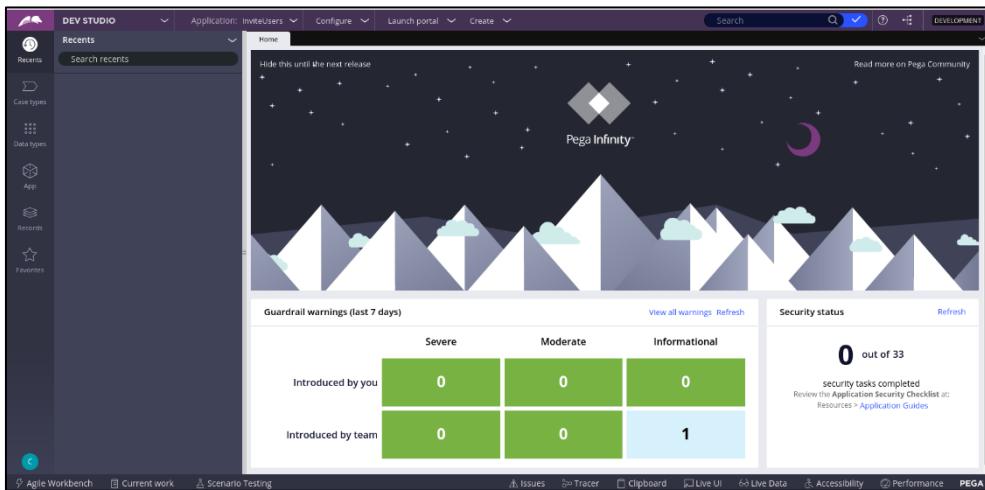
13. Click **Save** to save the changes.
14. Repeat steps 8 to 13 to update the user **CSRTester@auto**.
15. **Log off**.

Task 4: Test the users

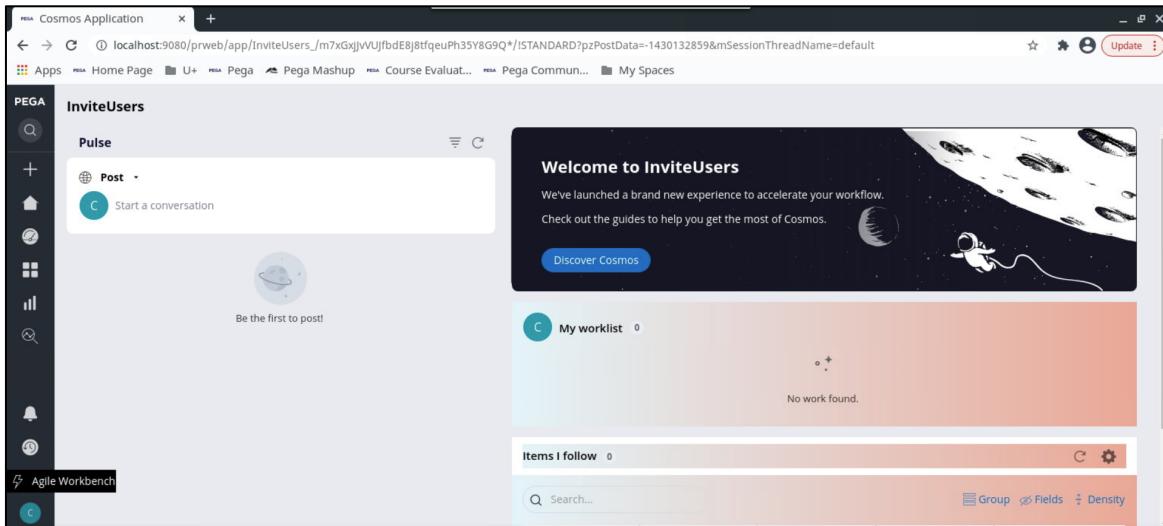
As the new login to access the application.

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

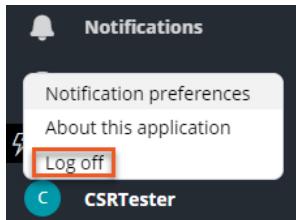
You are logged into Dev Studio.



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.

