Pega Platform '24.2

3 September 2025

CONTENTS

Glossary of terms

Terms used in Pega documentation. Click on a letter below or navigate using the table of contents on the left.

A

Abandonment rate

The percentage of call or chat requests that disconnect before a CSR responds to their contact attempt.

Abstract class

A class that supports the definition of rules, including other classes. Rules with a class as a key part (including properties, activities, flows, and data transforms) can apply to an abstract class. An abstract class can be inherited by subclasses of the abstract class and can be a child of a higher abstract class.

Access Control Policies

Access Control Policies restrict the abilities of users to view, modify, and delete instances of classes, or properties within classes. Define Access Control Policies to enforce access restrictions as a part of attribute-based access control. Users can gain access only when all relevant Access Control Policy conditions are satisfied.

Access Group

Controls how an operator interacts with an application. An Access Group controls an operator's access to elements of the application by defining the roles that the operator has. It also defines the user experiences that a user can use to interact with the application. You can create multiple Access Groups within an application to convey different levels of access based on user roles. A user can belong to more than one Access Group, but can log in to only one group at a time.

Access Manager

A landing page that you can use to view and authorize operator access to Case Types, data, and tools in your applications.

Accessibility

Accessibility ensures that all users - from people with permanent disabilities to those with temporary and situational challenges - can perform work as efficiently as possible, with or without assistive technologies.

Access Role

An Access Role defines the permissions and capabilities of a persona, such as a loan officer or a call center supervisor. Permissions for an Access Role are defined by selecting permissions to read, write, and delete, on a selected class.

Acknowledgment

A letter, email, or other correspondence that is sent to the originator of a work item that identifies the work item ID.

Action section

The area in a harness in which the action is performed. The section shows users the actions that they can complete. The action section is only applicable to Theme Cosmos and UI Kit applications.

Actions

Actions in Pega Platform™

Actions are behavior patterns that you can use to make UI components more responsive and user-friendly. Actions link a specific user behavior (an event) to a desired outcome. For example, you can specify that clicking an 'Add to cart' button (event) refreshes the cart in an online shop (action). You can define many events and actions in an action set, and you can create multiple action sets for a single control.

Actions in Pega Customer Decision Hub

Actions are customer recommendations that can take many forms, such as a banner advertisement, a retention offer, or a service message. There are two types of Actions in Pega Customer Decision Hub:

Always-on Actions

Actions that are available for the Next-Best-Action framework to select and deliver the appropriate communication to the customer, for example Promotional Actions, Transactional Actions or Mandatory Actions.

One-time Actions

Actions that contain a batch communication that all customers receive at a specific date and time. These Actions are executed in a Business Operations Environment. No engagement policies or constraints are applied to these Actions, and everyone receives the same Action.

Activity

The sequential processing unit in Pega Platform that consists of one or more steps. Each step can call a Pega Platform method, transfer control to another activity, or run custom inline Java.

Activity list

A queue that contains a list of activities that are waiting to run. Each user has the following activity lists: activity (default), workflow, and current.

Activity loop

A step in an activity that can run repeatedly, such as for each element in the Value List or Value Group property.

Activity type

A definition that describes the characteristics of an activity. Some activity types (Assign, Rule Connect, Route, Notify, and Utility) identify activities that you can reference directly in flows. The Activity Type field on the Security tab of an Activity form corresponds to the property Rule-Obj-Property.pyActivityType.

Actor

A user, external service, or agent that participates in application processes and specifications. You can view and define actors for the current application on the application rule, or by clicking the Actors link in the Details section of the Application Overview landing page.

Ad hoc Case

A Case that you can create to handle a business exception or track a related task in the Case that you are currently processing. Because ad hoc Cases are not instances of a Case Type, they are not part of your Case Type hierarchy.

Adapter control

A component that is displayed in Pega Robot Studio Object Explorer and used by automation developers. The properties, methods, and events of these controls provide a way to interact with native controls.

Adaptive Model

A Predictive Model that is self-learning and which Adaptive Decision Manager updates continuously as the system captures new input data and Outcomes. Adaptive Models calculate the propensities in Pega Customer Decision Hub™ in real time to obtain the relevance of each available Action to a customer when determining the Next Best Action.

Administraction tab

A tab in Workforce Intelligence where you map applications, map screens and webpages, maintain Off Computer Reason Codes, specify opportunity settings, and manage Pega Workforce Intelligence users.

Adopt

The final phase of the Pega Express methodology that encompasses business readiness including training, go-live planning, production deployment, and release retrospectives.

Rule-type Agent

An internal background process that operates on the server that runs activities on a periodic basis. In a multinode cluster, an agent can run on multiple nodes. Pega is limiting the use of a legacy background processing feature beginning in Pega Platform '24.2. Existing legacy background processing of Rule-type-agents continue to work but cannot be created. Pega strongly encourages clients to begin transitioning to run background processes using Job Scheduler and Queue Processor Rules instead of legacy background processes. For more information, see Removed or deprecated features and deployment options.

Agent availability

A setting that indicates how many CSRs are actually available to handle interactions (and not otherwise busy or unavailable).

Agent occupancy, agent utilization

The percentage of time that CSRs are busy with customers.

Agile Workbench

A tool for project stakeholders that captures real-time feedback about your application and tracks feature development. By managing feedback and development status directly in your application, you can make application development more efficient.

Alert event

An entry in the alert log. Alert events use the naming format PegaRULES-Alert-YYYY-MMM-DD.log.

Alert log

A sequence of text files (known as alert events) that support performance-related monitoring. The alert log supports the optional Autonomic Event Services (AES) Enterprise Edition product, which summarizes and monitors alerts across multiple nodes in a cluster.

Alternate Stage

A set of actions that lead your business process to a resolution in a scenario that is different from a default, primary path associated with the ideal process flow. You create Alternate Stages when your business process might result in more than one outcome. For example, in the process of hiring a new employee, a default path results in accepting a candidate. For better flexibility of your application, create an alternate path that the Case follows after rejecting a candidate. As a result, you ensure that your Cases can be resolved in many dynamically changing scenarios.

Alternate Stages are configured below the **Data & Interfaces** section in the Case Lifecycle window. When an Approve/Reject Step is added to a Case Type, Pega Platform™ automatically adds an Alternate Stage called Approval Rejection.

Analysis tab

A tab in Workforce Intelligence where you identify opportunities and see how much time has been spent in each application screen or on each webpage.

App Studio

The low-code development environment for developing enterprise applications fast with little to no programming. Business users, data engineers, and front-end developers, can design Cases, manage data, and define the user experience for an application.

Application

A business solution that automates workflows in your organization. Multiple, unrelated applications can be hosted in the same system. You create an application by running the New Application wizard.

Application-Based Assembly cache

A set of rules for which the Rules assembly on the current node is completed. Each Rule that generates and runs Java code is a candidate for the ABA cache. Note: ABA caching is a legacy mode of caching technology for Pega Platform. UI (stream aspect) Rules run with ABA caching, and all other Rule types run with VTable caching.

Application-editing mode

A view that you can enable to access tools and information. To enable application-editing mode, click Turn editing on.

Applications

A business solution that automates workflows in your organization. Multiple, unrelated applications can be hosted in the same system. You create an application by running the New Application wizard.

Application Explorer

A tool that you can use to quickly access records in the current and built-on applications that are available to your operator. These records are organized by work pool, Case Type, category, and record type.

Application Validation (AV) mode

A mode of rule validation that determine which rules are valid to reference at design time without having to use ruleset prerequisites. AV mode offers performance advantages over the alternative Ruleset Validation (RV) mode.

Application administration

The process of identifying applications and web domains, mapping them to a user-friendly application name and a work category to support analysis, and turning on or off the tracking of screens.

Application bundle

A .zip archive file that contains an XML document that is known as the manifest. During the import of an application bundle, the manifest controls the order in which rulesets, rules, or other items in the bundle are imported.

Application document

(Deprecated) A high-level business overview, including information on Case Types, flows, user interface, specifications, and requirements. You can create an application document by running the Document Application tool. For new applications, the product overview and gap analysis documents replace the legacy application document.

Application name

A meaningful and unique name that conveys the purpose of your application.

You specify an application name as a key part for the following application rules:

- Rule-Application
- Rule-Application-UseCase
- Rule-Application-Requirement

Application profile

(Deprecated) An aggregate of rules and project-related information, such as your implementation methodology or proposed timeline. You can create a legacy application profile to share with stakeholders. For new applications, the product overview and gap analysis documents replace the legacy application profile.

Application rule

A set of ruleset versions that added as a unit to a user's ruleset list. An application rule is an instance of the Rule-Application rule type, which is part of the Application Definition category.

Application ruleset

The container for the building blocks that define the behavior of your application. With application rulesets, you manage the versions of your application logic that are used to create the desired outcomes in your application. The order in which the system lists application rulesets on the application determines the priority of rules in that ruleset. For example, an application that is used for hiring new employees includes two rulesets, MyJobApp and MyHR, in that order. The system gives priority to rules that are located in MyJobApp over the rules located in MyHR because MyJobApp ruleset is first and MyHR is second in the list.

Application scoping control

A reusable gadget that filters by application layer, class name, and specified search term. The combination of filters that are used depends on how the control has been configured. This control is used throughout Pega Platform, but is most commonly found on landing pages.

Archiving and purging of Cases

A Pega Cloud solution that you can use to define when your inactive Cases are purged from your database and moved to a secondary storage, so that you can lower your database costs and improve application performance. For example, you can archive resolved Auto Loan Cases that are older than two years. If you need to access an archived Case, for example, for audit or compliance purposes, you can search for or navigate to the Case in the secondary storage.

Area chart

A chart that displays data points with filled space rather than points, curves, or lines. You can specify the chart type and subtype for a report definition by using the Chart Editor.

Artifact

An object that you create to provide information about a capability or piece of functionality in your application. Examples of artifacts include design documents, requirements, specifications, and user interface mockups.

Assign-base class

An abstract class above other classes that contain assignments.

Assignment

A task that a user completes so that the business process can advance towards the final resolution. You can add Assignments to the business process to collect information or seek approvals from users with different roles or levels of expertise. For example, in an online credit card application, a customer needs to fill out the online credit card application form by providing a range of personal and financial details. When the application form is completed, the process advances to the bank employees who can process the request by either approving or rejecting the application.

Associate

An office worker or employee whose job function is primarily performed on the desktop and whose activities are reported on and summarized by Pega Workforce Intelligence. Associates must have Workforce Intelligence Desktop Runtime installed on their computers. Desktop Runtime collects the information that Pega Workforce Intelligence presents. Associates are also called data collectors.

Associated Ruleset

A Ruleset that is linked to instances of data Classes. Associated Rulesets help to identify which data instances to include in an application package or when you export Rulesets.

Asynchronous messaging

A communication method used by Web Messaging and Mobile Messaging SDK connections in the Digital Messaging channels. Asynchronous messaging enables authenticated customers to leave and return to chat sessions containing a complete chat history based on the interaction.

Attachment category

A setting that controls the security of attachments in your application. Attachment category restricts user operations on an attachment, based on privileges, when conditions, or attachment types.

Attachment type

A setting that defines the media and format of items that users attach to work in your application. An attachment type is implemented in your application as a class that inherits from Data-WorkAttach-. The following standard attachment types are supported: file, note, screenshot, scanned document, URL, and content.

Attachment

A file or URL that you can add to the business process to provide additional information, such as relevant correspondence and documentation. You can group attachments into categories to enhance efficiency and speed up the resolution process. For example, in a car accident insurance claim process, the user can add photographs of a damaged car to the Vehicle damage category and the medical care receipts into the Bodily injury category. Categorization of attachments helps to provide clear separation and context for each file that is associated with the business process.

Audit trail

The history of events that took place during the business process for access to secure and immutable records of business transactions. The data includes information about which individuals worked on the business process and when, and what automatic processes were performed. For example, a healthcare company can review an audit trail of a healthcare insurance claim if there is a dispute to prove their compliance with industry standards or government regulations.

Authentication

The process or action of verifying the identity of a user or system. Authentication in Pega Platform ensures that only users and systems with verified identities can access resources such as web pages, APIs, and data.

Authentication Profiles

Authentication Profiles securely authenticate your application to external systems via an integration connector, such as Connect REST. Create Authentication Profiles to move messages securely to and from your application with a variety of connector and server rules.

Autocomplete field

A field on a form that supports user selection of a text value from a list of candidate values. When you enter characters in this field, the list is filtered to display only qualifying text values. You can configure the styles for this control in the Skin rule.

Automatic call distributor (ACD)

A device that distributes large volumes of incoming calls to CSRs. The ACD contains logic that drives routing decisions based on multiple input parameters. Routing parameters can include a combination of data about available CSRs and their skills, and specific information about the call and caller. Common vendors include: Avaya, Aspect, and Cisco.

Automatic number identification (ANI)

A series of numbers associated with a call. These numbers identify the phone number of the caller. Sometimes referred to as a CallerID.

Automation

A Pega-supplied Rule that you can use in Case Designer, Processes, and activities to perform specific Tasks that do not require human involvement, for example, to advance a Case to the next Stage.

Autonomic Event Services

An optional product that monitors, retrieves, organizes, and displays Pega Platform system statistics and warning conditions at the enterprise, cluster, and node levels.

Autopopulated property

A Page or Page List property that automatically obtains data directly from a specified data page. The values can be an entire object from the PegaRULES database or copies of pages developed by a Data Page rule. To enable autopopulation for a Page mode or Page List property, configure the Data Access fields on the General tab of the Property form.

Available Rule

A Rule that is visible and can run during Rule resolution processing. For an available Rule, the value of the *pyRuleAvailable* property is set to `Available` or `Final` (and is not blocked).

Average handle time

Length of time, on average, to process one customer interaction.

Average speed of answer

Average length of time a caller is on hold before a CSR answers the call.

B

Back-to-back assignments

A situation when a user completes an assignment for a specific work item and then works on a second assignment for the same work item. The second assignment can be from the same flow execution or an unrelated flow execution.

Background Processes

Internal Processes that run in the background. You can create job scheduler rules for running scheduled tasks or queue processor rules for asynchronous processing such as sending real-time email messages or submitting status changes to an external system.

Backward chaining

A feature that allows for a computation to advance even when the value of an input or parameter property is not available. This capability is provided by the Rule-Declare-Expressions rule type and the Property-Seek-Value method working together, and can be seen in standard flow actions including VerifyProperty and VerifyPropertyWithListing.

Bar chart

A chart that displays property values as horizontal bars. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Base class

A standard abstract class that is immediately below the top class in the hierarchy. This top class, known as the ultimate base class, is identified by the symbol @baseclass.

Base rule

The original version of a rule that has been circumstanced. A base rule must exist for every circumstance.

Benefit value analysis

An approach that decomposes processes and journeys into low-level steps and explores the value that each step brings to the overall experience. This is achieved through a series of workshops that: introduces the objectives of the process; identifies the key functions of the process; explores new ideas for improving the process; prioritizes the ideas based on the value.

Best Bets

A subset of options that are likely to have the choice for which you are looking. Best Bets are classes in your application that are the Applies To key part of one or more rules.

Blended agent

An employee in the role of contact center agent who divides their time and attention between multiple communication channels (voice, email, SMS) to service customer needs.

Bounded workflow

A workflow that starts on a specific application or view and ends on a specific application or view. These workflows are based on Production and Other work applications. Your system administrator defines those applications and screens, and assigns the workflow tags that represent this workflow.

Branch

A container for Rulesets with Rules that are undergoing rapid change and development.

Branch ruleset

A ruleset that is based on another ruleset and contains rules that are in active development in the associated branch.

Breadcrumbs

An indicator of which area of the hierarchy is being shown on the screen. You can click on a breadcrumb to jump to a previous level of the hierarchy.

Breadcrumbs control

A UI element that shows each task, or entry point, in a flow execution. Application users can click a task based on settings in the flow. The flow can allow users to jump to any task in a flow, or just to the completed tasks.

Bring Your Own Key (BYOK)

An end-to-end encryption cloud computing security model that enables you to use your own encryption software and manage your own encryption keys. You can use BYOK encryption for your Web Messaging and Mobile Messaging SDK connections in the Digital Messaging channel.

Bubble chart

A chart that displays three dimensions of data in a two-dimensional format. With a bubble chart, all three dimensions are numeric, as opposed to column or line charts, where one axis is numeric and the other is a category.The horizontal and vertical axes represent two of the three dimensions, as in other charts. The size of the colored circle, or bubble, for each data point represents the third dimension.You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Build order

A part of the delivery approach that specifies the sequence in which rules and data instances are created when earlier phases are complete. The build order might differ in separate iterations of the implementation.

Build

The third phase of the Pega Express methodology that describes how to iteratively build and test an application and how to refine more user stories during each sprint. The output is working software that both meets the definition of done and passes all the relevant tests.

Business Architect

A role that drives working sessions to further understand microjourney steps and to create the user stories used by the technical team. Different levels are Senior, Lead and Principle BA.

Business Intelligence Exchange (BIX)

An optional add-on that integrates Pega Platform data with information from other systems of record. Enabling the BIX ruleset allows extraction of data from the Pega Platform database. The BIX Extract rule defines the class, page, and properties from which to create extract files.

Business Value Assessment (BVA)

A phase of the implementation methodology during which stakeholders define the success factors and expected return on investment of the project. Business Architects play a major role in this phase.

Business day

Scheduled work days for users. Business days are not identified as holidays or other days with no work on a calendar data instance. If your application includes multiple calendar data instances, a non-business day for some users might be a business day for others.

Business exception

An unusual condition within a business process that warrants investigation or external review. A business exception might indicate fraud, error, compliance failure, or other potential harm to the organization, customers, or other parties.

Business process management (BPM)

The organizational activity of developing and managing processes that are responsive to change and improve business performance outcomes. When an organization uses BPM, they coordinate the presentation of the user interface, logic, and data access for an application with the process for how work gets done.

Business rules engine (BRE)

A Java-based rules engine that separates business logic from applications and enables the enterprise to capture, manage, and execute business policies and practices as business rules. The business rules engine supports declarative rules, multithreaded execution, and a large number of industry interfacing standards.

C

C#

Pronounced C-Sharp, is a multi-paradigm programming language encompassing strong typing, imperative, declarative, functional, generic, object-oriented (class-based), and component-oriented programming disciplines.

Calculation Builder

A tool that provides a guided interface to help you define SQL expressions for use in report definition rules.

Calendar

A data instance that records the work schedule of an organization or group of people, including holidays and shift start and stop times. Calendar data instances can be referenced in organization, work queue, and operator ID data instances, and service-level agreements. The calendar allows due dates and similar calculations to be based on business days rather than calendar days.

Case

A Case is a work item performed by application users that consists of a sequence of tasks and leads to an intended business goal. An example of a Case is the process of hiring a job candidate, where an HR worker collects necessary documents, a hiring manager conducts a job interview, and an application sends an automated email with onboarding information after the candidate is approved.

While a Case Type is an abstract model of a business transaction, a Case is a specific transaction instance.

Case collaboration

A method to quickly and conveniently share and exchange information by instant messages, spaces, and shared documents. For example, in a business process of reviewing a job application, an HR worker and a hiring manager might exchange messages about the course of the process and attach relevant documents to the messages. You can collaborate with other members of your organization, such as your coworkers, but also with outside customers without access to your application. To reach target recipients of your communication, you can use different channels, such as email or text messaging.

Case dependency

A relationship between your main business process and supporting business processes that need to be resolved before the main process reaches resolution. Pega Platform refers to the main business process as a parent Case Type, and to supporting business processes as child Case Types. For example, a parent Case Type that represents hiring a job candidate can only be resolved after child Case Types for running a background check and completing a review process are completed. Parent and child Cases interact with each other, for example, by copying data from a parent Case to child Cases. By creating Case dependencies, you can resolve complex business processes without creating long and complicated Case Types. This modularity also helps you save time and costs, because you can reuse child Case Types in different scenarios.

Case ID

The permanent, unique identifier of a Case. Your application generates a unique ID for each Case to help Case workers distinguish between instances of different Case Types and find Cases that are relevant to your application or organization.

Case IDs come in the following format: prefix-integer. By default, a Case ID contains the following elements:

Prefix

A single character that your application derives from the name of the Case Type that you provide when you create or import a Case Type, and a hyphen. Prefixes are required, but they do not need to be unique. More than one Case Type can share a prefix.

You can modify the prefix to help Case workers distinguish between instances of different Case Types. You can enter a text that relates to the purpose of a Case Type, for example `JobApp-`. The Case ID for a Case Type can be modified on the Settings tab of a Case Type under the **General** category.

Integer

A number that increases by one each time that you create a Case. You cannot count the number of Cases in your application based on the integer of a Case ID because the system reserves Case IDs before successfully creating a Case.

Case instance

See Case.

Case instantiation

The way that a Case is created in your application. You can manually create a Case or automate this process based on the creation of a parent Case, a set of When conditions, Case-type dependencies, or received email.

Case Lifecycle

The Case Lifecycle shows the work progress of a Case and divides the Case processing into Stages, Processes, and Steps. It is the visual indicator for users to understand where they currently are within a Case's workflow.

Case Lifecycle Designer

Case Lifecycle Designer is a tool that you can use to quickly configure a Case Type without having to manage the underlying Rules that support it. You work in Case Life Cycle Designer when you open a Case Type from the Case Type Explorer.

You can use Case Lifecycle Designer to perform the following tasks:

- Defining a Lifecycle for a Case Type
- Adding functionality to a Case Type
- Building a form
- Creating a PegaUnit test Case for a Process or Case Type

Case management

A method of delivering goal-oriented results by handling business Cases from start to resolution and combining human actions with digital automations. In Case management, you use data and people that are involved in a business process to visualize and model work, so that you can prepare a set of actions that lead to your objective. For example, you can model a process of approving candidates after reviewing job applications, from collecting documents from a candidate, through the job interview, to the final approval.

Case manager

An application user who handles and oversees the progress of Cases in an application. Case managers use the Case Manager Portal to work on Assignments, monitor Case statuses, ensure that Service-Level Agreements are met, and collaborate with other team members. Case managers can also update certain business Rules that have been delegated to them, allowing for quick adjustments to a Case Lifecycle without involving IT.

Case Manager Portal

A Portal that supports users who manage Cases and their related assets and tasks across multiple Channels, lines of business, departments, and systems. Users can create, view, and work on Cases and Assignments.

Case resolution

An act of completing your business process. When the Case reaches resolution, you can view the resolution status that describes the process outcome. By analyzing the resolution status, you can learn whether the Case was successfully completed or rejected. You can configure how your business process behaves after reaching the resolution Stage. For example, when a loan request dispute reaches resolution, your application displays a Resoled-Approved status to inform that the loan request was approved. If your business process supports child processes, you can configure their behavior after the main process is resolved. For example, if the loan request is rejected, your application withdraws all the supporting processes.

Case Status

The primary indicator of the current state of your business process. By using Case Statuses, you communicate progress to people that are involved in Case processing to ensure a common understanding on the path to reaching your business objectives.

For example, you can use a Case Status **In-Progress** to communicate that a Case worker is working on a Case, and **Resolved-Completed** to announce that the Case reached a successful resolution.

You can use default Case Statuses, or you can create custom Case Statuses to meet your unique business needs.

Case Type

A Case Type is a template for a Case that you can reuse for multiple instances of the same business process, such as hiring candidates after reviewing job applications. By creating a Case Type, you define your business goal, the path that your work follows to a resolution, the people who are involved in processing a Case, and the data that the Case requires.

For example, for hiring a new employee, you define actions such as collecting documents and interviewing a candidate, people such as a hiring manager, and data such as a candidate's working experience. When you create reusable work templates, you save time and ensure that your business processes can reach a successful resolution.

Case participant (stakeholder)

A Case participant, or a stakeholder, is a person, business, or organization that is involved in a Case. Case participants receive correspondence, such as email, and can be active or passive contributors based on their role. For example, in a Customer complaint Case Type, the customer who logs the complaint and the Case worker are both participants.

You can use a **Stakeholder** widget to display a list of Case participants in the **Utilities** pane of a Case.

In Pega applications, the terms Case participant, Work party, and Stakeholder are often used interchangeably. They all refer to individuals or entities involved in a Case - whether actively working on it or simply needing updates about its progress. These participants can be internal users of Pega Platform™, or external parties without direct access to the system.

Case Type Backlog (CTB)

A tool whose primary role is to capture the key constructs (data, interfaces, personas, and channels) that are required to build the selected high-value Microjourneys and to define the scope for the first MLP release. The CTB also facilitates quick project sizing and is a key handover document from the Discover phase to the project team at the beginning of the Prepare phase.

Case Type dependency

A condition that must be met before a child Case is created or an assignment is automatically completed. Each condition defines a Case and a status.

Case Type Explorer

A tool that you can use to manage Case Types and browse sample Case Types. By using the Case Type Explorer, you can create a hierarchy of Case Types in your application.

Central Processor Unit (CPU)

Certificate set

A place that gathers all keys and certificates that are needed to properly configure, build, and run a mobile app for Android or iOS.

Certified Lead System Architect (CLSA)

A person who is responsible for the design and quality of Pega solutions. This person has passed a certification exam issued by Pega that tests their knowledge of design and implementation of Pega solutions. These people typically lead implementation teams and ensure that solutions use the technology to provide an optimum business outcome.

Certified System Architect (CSA)

A Pega Platform application developer or technical staff member who has passed an exam that acknowledges the acquisition of foundation-level knowledge of Pega solutions.

Change request (CR)

Anything that impacts the objectives, cost, timeline, or resources on a project. Even changes that have no cost impact should be logged. A change may be instigated by the project team or the customer. Change requests should be recorded on the weekly Project Status Report and in a change log.

Channel interface

A portal that includes predefined layouts and navigation. You can use channel interfaces to quickly customize the user interface of your application by selecting headers, menus, and a page that is displayed when a user logs in.

Channel switching

A feature that enables you to add pre-configured Digital Messaging channels, for example, Facebook and WhatsApp, so that a customer can transfer the ongoing interaction from Web Messaging to those channels during a live conversation.

Channel

A Channel is a digital medium through which users access your application. Depending on your business needs, you can set up various Channels for the same application. For example, customers can access an application for booking flights through a browser-based web Channel, or through a mobile Channel that relies on a mobile app.

Chart Editor

A tool that you use to create and edit charts for summarized reports. You can use the Chart Editor to select a chart type and subtype, define the appearance and formatting of titles and information, and specify the report data that populates the chart. You can access the Chart Editor from the Charts tab of a Report Definition rule form or from the Report Editor.

Chat Widget

A user interface that consists of Pega Web Messaging Widget, enabling customers to interact with CSRs and chatbots within the Digital Messaging channel.

Check-in process

The process of replacing a base rule version with a private copy of a Rule- instance that you checked out and updated.

Checkout

A private copy of a Rule- instance that you update and later check in to replace a base rule version. All checked out rules reside in a personal ruleset that is only visible to your operator.

Child Case Type

A supporting business process that adds up to your main business goal and that you need to resolve before you reach our ultimate objective.

For example, a business process that represents hiring a job candidate can only be resolved after child Case Types for running a background check and conducting a job interview are completed. By using child Case types, you save time and increase flexibility of your application, because you can reuse individual child Case Types in different scenarios.

Circumstance

An optional qualification that is available for supported rule types and is built upon an unqualified rule known as the base rule. By using circumstances in your application, you can easily support a variety of use Cases.

Class

The Rules that define the behavior of your application. You can create classes to gather rules related to a specific object in your application. For example, in a recruitment application, you can create a class that contains Rules that define the flow of the recruitment process. Classes can contain other classes, hence a class that contains another class is called a parent class, while a class that is contained by another class is called a child class. A child class can reuse, or inherit, any of the Rules that are defined for its parent class, which helps to build your application faster and more efficiently.

Class Group

An instance of the Data-Admin-DB-ClassGroup Class that corresponds to tables in the PegaRULES database. Class Groups cause the system to store instances that correspond to two or more concrete Classes that share a common key format in a single database table, which is known as a work pool. The name of the Class Group is a prefix of the names of its member Classes.

Class hierarchy

The way classes are organized in the application to ensure sharing of rules and data. When you create a class hierarchy, you define which classes contain other classes and, as a result, you define how classes reuse or inherit rules. A class that contains another class is called a parent class, while a class that is contained by another class is called a child class.The ultimate base class (@baseclass) is the topmost class in the hierarchy. All other classes are derived from this class. The names of all classes that belong to a common class group start with the class group name, followed by a hyphen.For example, if you define a class group Work-Object-App-Task, you can name the child classes in this class group Work-Object-App-Task-Ordering, Work-Object-App-Task-Shipping, and Work-Object-App-Task-Billing. Child classes can use rules that belong to parents (for example, user data).

Class inheritance

While a class contains rules which define the behavior of your application, class inheritance allows your application to reuse the existing rules for other Cases or applications. Rule reuse reduces development and testing time without sacrificing application quality. Thanks to inheritance, a child class can use all of the rules that are defined for the parent class. The system supports two types of class inheritance:

directed inheritance and pattern inheritance. Pattern inheritance allows you to reuse rules within a single application only, whereas directed inheritance allows you to reuse rules in other applications. For example, you design a banking application that contains two divisions: Customer Support and Business. The divisions can use pattern inheritance to share rules related to the customer data because they belong to one organization. In turn, two separate applications that require to share the customer data can only use directed inheritance.

Class name prefix

A series of characters that precede the class name. Class name prefixes are used during pattern inheritance when Pega Platform searches the class structure to find a rule by using a sequence of prefixes of the class name. The hyphen delimits segments of the name.

Classification

A text value in the prconfig settings or dynamic system settings that is used to group nodes that share specific setting values in a multinode or clustered system.

Client Channel API

An application programming interface (API) for the Digital Messaging channel. The API offers a standardized method for exchanging messages between Digital Messaging Service and several types of third-party client channels, for example, Teams, Webex, or Slack.

Clipboard

The working memory for a Pega application user session. Your application uses information from the Clipboard to process work and make decisions about the next action.

For example, when a courier opens a delivery application to check the address of a customer, the system populates the address field in the application with the information stored in the Clipboard. In this way, the Clipboard acts as a temporary memory for your application and the Case.

Clipboard message

A text clipboard value that is generated by the system and associated with a property or page. A clipboard message can convey error conditions, progress, or exceptions to the user.

Clipboard tool

A debugging and troubleshooting aid for application developers. The tool lets an application developer examine a snapshot of the structure and contents of their own clipboard and change these settings in their workstation browser. The clipboard resides on the server.

Code-base class

A class that contains all the classes that define the objects used by a Pega Platform implementation. Application developers can work with properties and clipboard pages associated with classes derived from the Code- base class.

Collection

An ordered sequence of rules to run. In each step of a collection, you can define a precondition that is evaluated before execution, and a response action that runs after the step is completed.

Column Populator

A utility that you can use for database and schema maintenance. Column Populator is a command-line script that allows you to update rows of database tables after database schema changes. This utility can populate values for a new column that corresponds to a newly exposed property, expose values that were previously stored only in the Storage Stream (BLOB) column, and optionally rebuild database indexes and Index- instances that are defined by Declare Index rules.

Column chart

A chart that displays values as vertical bars. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Combo chart

A chart that combines and displays the data from both a column chart and a line chart. A combo chart has either a single y axis (vertical) or two y axes. The two data sets share the same x axis (horizontal). You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Committed hotfix

A permanent part of the system. You cannot roll back a committed hotfix.

CommonConfig.xml file

A file that contains information that is necessary to connect to and work with systems that are external to Pega Robot Studio and Pega Robot Runtime. This file is copied to your computer when Pega Robot Studio and Pega Robot Runtime are first installed.

Compensating Action

An Action that allows a custom activity to update an application data to negate the effects of a connector failure. This type of Action is an optional feature of Connect SOAP and Connect dotNet Rules.

Complex question

A survey question that captures information from users in a multianswer format. For example, you can ask users to list their five favorite movies.

Complexity score

A numeric value that indicates the variability that is required to complete a workflow, including total applications and screens, unique applications and screens, and the number of steps in a workflow. Higher scores indicate lower levels of complexity.

Compliance score

A weighted score for each application that measures overall compliance with Pega Platform best practices and guardrails. This score is available on the Guardrails landing page.

Compliance

Rate of compliance with regulations, scripts, policies, procedures, and full disclosure rules.

Component ruleset

A ruleset that contains rules that are designed to define reusable applications or functionality that executes as embedded within an object. When a component ruleset is installed in multiple systems, the class of the object might vary from system to system.

Composite portal

A user portal that is defined by a collection of harnesses that each references a screen layout. Each harness defines an entire portal window.

Composition grid

A Data Designer grid that lets you review and manage the selected data type's properties. The composition grid appears on the Definition tab of a data type.

Computer telephony integration

Computer control and functionality applied to telephony hardware.

Concrete class

A class that is displayed anywhere below the top level of the class hierarchy, often near or at the bottom of the list. There are several types of concrete classes: internal classes, external classes, rule types, and work types.

Condition Builder

A tool that helps you build Conditions by providing a user-friendly, graphical interface.

Configuration bundle

A set of application-specific configuration definitions. You can use a configuration bundle to store historical configuration information or export the configuration bundle to a JSON file to port the definitions and values to other instances of the application.

Configuration definition

A rule that you can use to set an application-specific parameter. You can export a set of all configuration definitions and values to a configuration bundle JSON file.

Configuration Sets

Groups of Configurations associated with a common element, such as an application feature or specific Case Type. Configuration Sets minimize the need for custom Rule changes by providing users with a low-code way to adjust the run-time behavior of an application.

Connector

A means that enables Pega applications to use data and capabilities in remote systems by using standard network protocols while staying within the recommended model.

The term connector is used in the following ways:

- On a Process diagram, a connector is a line that connects two shapes. Typically, connectors leaving an Assignment shape represent Flow Actions. Other connectors might link to a When Condition Rule.
- On external systems of record, a connector defines and implements an interface between a Pega Platform application that acts as a client and an external system that acts as a server.

Connector Flow Action

A task that users perform to move a Case closer to resolution. You create Connector Flow Actions when you add a Step to the Lifecycle of a Case that collects information.

Connection pooling

A cache of database connections that are maintained so that the connections can be reused when future requests to the database are required. Connection pools are designed to improve performance by minimizing the opening, closing, or maintaining of a separate database connection for each requestor. When you use connection pooling, a database connection is returned to a pool when it is no longer needed by a requestor and made available for future requests.

Constraint

A relationship between values that is always expected to return a true result. For example, if you want to set a status of your business process to Resolved-Completed, you always need to provide a completion date as well. Creating constraints help you maintain compliance and avoid errors in your application.

Contact preference

A setting that indicates how a work party wants to be contacted. For example, some parties might prefer to receive correspondence as email, by fax, by phone, or through mail. The contact preference is always email for users that are identified as a party of the Data-Party-Operator class.

Container class

A concrete or abstract class that unifies a set of classes in the PegaRULES database. A container class has a name that corresponds to a class group. A class group, in turn, has a name that matches a class rule.

Content Security Policy

A set of directives that is used to control what is displayed in a client browser by informing the browser of the locations that can be used to obtain content. Each directive governs a specific resource type.

Corporate governance meeting

A meeting that ensures understanding at a corporate level and provides an overview of all interactions between companies. Corporate governance meetings also review and resolve escalated issues between companies.

Correspondence type

A setting that defines whether a correspondence is a printed letter, a fax, an email, or a text message.

Correspondence

A Correspondence Rule, which defines the content and format of outgoing communications—such as emails, letters, faxes, or text messages—produced by the system or its users. These Rules serve as templates that can incorporate dynamic data, allowing for personalized and context-specific messaging associated with individual Case items.

Cover

A parent Case of one or more related Cases. Typically, one work party, such as the customer party, is present in the cover Case and in all of the covered Cases that are associated with it. The covered Cases are the children in a parent-child relationship. A cover can be a parent of other cover objects (and their children). Use a Case Type rule in the cover class to define the covered objects for the parent cover.

Credentials

Parameters that authenticate users or external processes that need to access applications, enabling users to log in with appropriate security permissions. Credentials typically consist of a user name and password. The user name is the key to an operator ID instance. The password can be stored in that instance (in encrypted form), or in a corporate directory service, such as the one provided by Microsoft Active Directory.

Custom field

An instance of the Index-CustomFields class that has two parts, a name and a value. Associating custom fields with rules provides a flexible way to supplement your application with metadata, such as a change order number or a log file attachment. Custom fields are not available for Data- objects.

Custom Function

A Function that you create with Java code that you define. Placing logic in a reusable Function can reduce the amount of custom code in your application.

Customer

A work party that typically initiates a Case. In many applications, only one customer can be associated with a Case.

Customer satisfaction

A metric that measures how a Case was completed as assessed by your organization. Customer satisfaction is a perception of the customer's viewpoint, unrelated to whether your organization performed the work properly or in accord with your standards or industry standards. Use the standard property Work-.pyStatusCustomerSat to record customer satisfaction.

D

Daemon

A reserved background Java thread that executes as a BATCH requestor type. Daemons behave similarly to agents, but daemons are not defined by a Rule-Agent-Queue rule type, are not full requestors, and operate continuously and automatically. Pega

Platform includes the following daemons: License Compliance, Master-for-Agent, Master-for-Requestors, Node, Passivation, and Usage.

Dashboard

One of the following UI elements:

- A centralized workspace that displays operational information about your application and key performance indicators, such as the number of assigned items or the average time to resolve a Case. A dashboard can include charts, reports, worklists, and other widgets.
- A single webpage that shows the current status and ongoing trends of your organization's behavior. This data helps you to make informed decisions and guides you to specific investigations or outcomes.

Data

Information that is captured during the Lifecycle of a Case.

Data- base class

A top-level abstract class that defines and contains static data and cumulative data. Pega Platform applications often retain essential and frequently used data in the *PegaRULES* database, which is organized into concrete classes that are derived from the *Data-* base class.

Data Designer

A view that you can use to review and manage data types in your application. When you select a data type in the Data Explorer, the data type opens in the Data Designer.

Data dictionary

The data dictionary is a feature that is available in Customer Profile Designer in Pega Customer Decision Hub and in Prediction Studio. The data dictionary provides governance tags to help you manage and understand field usage in your system. Data tagging help you organize data and make fields available for use in particular features, such as AI models, Engagement Policies, and Ethical Bias policies. Field usage data shows which Rules reference a specific field, to help you make informed decisions about data management and compliance.

Data collectors

Office workers or employees whose job functions are primarily performed on the desktop and whose activities are reported on and summarized by Pega Workforce Intelligence. Data collectors must have Workforce Intelligence Desktop Runtime installed on their computers. Desktop Runtime collects the information that Pega Workforce Intelligence presents. Data collectors are also called associates.

Data element

A pairing of two pieces of information: the name of the data element and the value that is assigned to the data element. Data elements are stored in memory on a page.

Data exploring

A term that denotes one of the following activities:

- Understanding the relationships among your Case Types, data objects, and fields in your application.
- Browsing and searching for records and instances in the Report Browser.

Data Flow

Data Flows are scalable data processing pipelines that read, process, and write data based on various data sources. A Data Flow consists of components that transform or enrich the data in the pipeline. These components run concurrently to handle data from the source to the destination. Data Flows support such operations as running decisions, performing text analysis, and creating real-time aggregations.

Data instance

A data instance is an instance of a concrete data class, a concrete class derived from the Data- base class. For example, a work queue is an instance of the Data-Admin-WorkBasket class.

Data mapping

Mapping the data elements in an external system of record to the fields or other data elements in Pega Platform. Data mapping is defined in service and connector rule forms.

Data Model

The data structures and entities in your application, for example Case Types and data types (data objects), and how they relate to one another. Also: the visual representation of those data relationships, available in the dedicated tab.

Data Object

Data Objects are containers that organize fields, Data Pages, Views, and other elements that your application needs to access data. Data Objects are available throughout an application. Data Objects are managed using the Data Explorer in App Studio.

> **NOTE:** In Dev Studio they are referred to as Data Types.

Data Page

An entity that you use to cache data on demand to a clipboard page for use by one or more applications. A Data Page Rule defines the source, scope, refresh strategy, editability, and structure of the cached data. Data Pages were previously known as declare pages.

Data Record

An instance of a data type (data object) that is stored for your application and contains actual data. For example, customer Data Records contain data specific to each customer, such as the name, email, phone number, and so on. You can manually create Data Records or import a set of existing Data Records in Data Designer.

Data reference

A type of field that you configure on a form. At run time, a data reference displays a list of data type instances, or data records.

Data Set

Data Sets serve as data sources in your application. Data Sets can contain different types of customer and analytical data, such as customer attributes, product holding, or their activities on various channels. Data Sets are key components of data integrations that connect your application to external systems of record, such as file repositories and real-time data streams. With Data Sets, you can store, enrich, and summarize data to derive valuable customer insights and use them as input for informed decision-making and AI modeling.

Data source

Any source of data that an application uses, such as a connector, report definition, or lookup. Data sources are referenced in Data Pages.

Data table

A data storage that is superseded by the local data storage feature. Click Convert for each data table that is displayed on the Data Tables landing page to convert it to the new format.

Data Transform

Defines how to convert data that is in one format and Class (the source) into data of another format and Class (the target). The supported formats are clipboard and JSON.

Using a Data Transform instead of an activity to set property values speeds up development and makes application maintenance easier.

Data Type

A data structure that defines and holds data for your application. For example, you can create a `Customer` Data Type to manage customer contact information. It might include fields such as the customer name, email, and phone number. Data Types are managed using the Data Types Explorer in Dev Studio.

Day I Live Plan

A deliverable that describes the difference, from the business's perspective, between the current state and the moment when the Minimum Lovable Product (MLP) goes live.

Deadline

An interval of time that is defined in a service-level agreement. A deadline is the required resolution time for an item, such as a Case or stage.

Decision

A Process shape that evaluates an Expression or calls a Rule, such as a decision tree, to determine which Step is next in the Process progression. By adding a decision point to your Case, you support more than one outcome for your business process, and adjust the Case to changing business needs and circumstances. For example, in a loan request process, the Case might follow multiple paths depending on the loan amount.

Decision data definition class

A class where you define the set of decision properties. You can add these properties to be displayed on the Decision Data form.

Decision strategy

Decision strategies combine business Rules and AI models to determine the most relevant and valuable action for each customer, with the goal of optimizing customer engagement and overall business results. In Pega Customer Decision Hub™, you can define the criteria for delivering Next Best Actions, such as channel limits, suppression Rules, engagement policies, and arbitration Rules for prioritizing Actions, by following the guided workflow in Next-Best-Action Designer. As you define the criteria, Next-Best-Action Designer generates the underlying Decision strategies for you. You can customize Decision strategies by using the designated extension points or by creating new Decision strategies manually. See also Strategy Result class.

Decision table

A table that consists of one or more rows that contain test Conditions and a result to return. Evaluation proceeds from top to bottom; when the Conditions in all cells in a row are true, the result of that row is returned. If no row returns a value, the table provides the *Otherwise* row result. Decision tables are instances of the *Rule-Declare-DecisionTable* class.

Decision tree

A Rule that defines a series of tests on property values to allow an automated Decision. Decision trees capture and present business logic in the form of one or more if/then/else Conditions. Decision trees are instances of the *Rule-Declare-DecisionTree* class.

You can use different types of logic when you add the Decision shape to a Process. A Decision tree returns a single value for the branch in the tree that meets the if-then logic that you define.

Declarative network

An internal data structure that defines the relationship between properties whose values are automatically (declaratively) calculated based on changes to other property values. You can configure and visualize complex relationships by using the declarative network display, which shows the target property and all potential input that might affect its final value.

Declare Expression

An Expression that helps you configure your application to automatically update property values. By setting up Declare Expressions, you define a computational relationship between properties. For example, you can define the total order amount as the sum of all line items.

Definition of Done

The criteria that developers must meet before they declare that their development work is complete for user stories.

Delegated Rule

A Rule that is visible to a specified Access Group. Rule delegation facilitates Rule management outside of the development environment. A delegated Rule can be a paragraph, decision table, data type, Correspondence, or map value.

Delivery Handoff meeting (Sales-to-Service transition)

A meeting that ensures that Pega and partner project teams prepare effectively by knowing what has been sold and what is expected in the delivery. This meeting must be held during the end of the Discovery phase and has to provide continuity from the Discovery phase to the project team.

Deployment Manager

An application that provides a low-code, model-driven experience to configure and run continuous integration and delivery (CI/CD) workflows for your application.

Deployment level

A stage which a Pega Robot Studio solution goes through as it moves from development to production. The first and last stages, Development and Production, are built into the system for you. You can define any intermediary stages that you need, such as stages for testing and staging.

Design Sprint

A five-day design thinking process for answering critical business questions through design, prototyping, and testing ideas with customers.

For more information, see

https://community.pega.com/knowledgebase/articles/pega-express/design.

Design thinking

DDesign thinking is a human-centered approach to innovation that draws from the designer's toolkit to integrate the needs of people, the possibilities of technology, and the requirements for business success. (IDEO Definition)

Developer Assistant

The Developer Assistant pane in App Studio provides access to documentation, guidance on the building blocks of your application, and helps you complete tasks that are required before the application can go to production, such as completing the Application Security Checklist.

DevOps

DevOps (development and operations) is a set of practices that bridge application development and operational behavior to reduce time to market and create a standardized deployment process so that you can deploy predictable, high-quality releases.

Dialed Number Identification Service (DNIS)

A feature of 800 or 900 lines that identifies the phone number that the caller dialed to reach the attached computer telephony system.

Digital Experience API (DX API)

A way of structuring your technology and systems to support customer and business outcomes, which is part of the Center-out® approach to business architecture.

Digital Messaging Manager

A user interface in the Digital Messaging channel used for creating and configuring channel connections, for example, Web Messaging and WhatsApp.

Digital Messaging Service

An application that empowers all the Digital Messaging channels through a serverless, event-driven architecture on the AWS cloud.

Direct Capture of Objectives (DCO)

The ability to directly and visually capture business outcomes while improving the way business and IT collaborate to achieve them. The Pega Express methodology encompasses Pega delivery methodology, and DCO is a tool and approach that supports it.

Directed inheritance

A method by which a class inherits characteristics directly from a specified parent class, regardless of any defined pattern inheritance. For example, the PegaSample-CustomerRequest class (part of the PegaSample sample application) employs directed inheritance, and its directed parent class is Work-Cover-DupByCus. Based on pattern inheritance, the parent class is PegaSample.

Directive

(Deprecated) A message for a JavaScript container. For improved performance and debugging, use JavaScript tags to develop new applications.

Discover gadget

A visual representation of the layers of your application. By seeing where an item exists in the application, you can understand whether an object is inherited from another layer or comes from your own definition. From that visualization, you can click a layer to open the application rule. The Discover gadget is displayed for Case processes in Dev Studio and App Studio, and for sections (including work areas and Views) in App Studio.

Discover

The first phase of the Pega Express methodology that is typically conducted as part of the sales cycle or during the development of a business Case. The Discover phase includes a decision on the journey to build, agreement on the Minimum Lovable Product (MLP), graphical representation in a service blueprint, and project readiness to start. The output is an agreed scope, and a delivery team and all the necessary infrastructure necessary is in place.

Division

The middle level of the three-level organization hierarchy that is available for use in every application. Divisions are below the organization level and above the organization unit level. Divisions are referenced in organization units and in operator ID instances. A division is an instance of the Data-Admin-OrgDivision class.

Document Application tool

A tool that captures information and images from any application in your stack and generates customizable product overview and gap analysis documents that you can share with stakeholders. This tool was previously called the Application Document wizard.

Dot notation

Syntax in an expression that precedes the name of a property with a period. You can use dot notation to reference single-value properties and complex properties. For example, .CurrentSalary and .Customer.FirstName are both valid user inputs in a field that supports expressions.

Draft mode

A setting on the Flow form that supports references to rules that are not yet defined or completed. By enabling draft mode, you can choose the order in which you develop your flow and its dependencies.

Drill down

An icon that you can use to move through the hierarchical view of data, from general to more specific data, to find the data that is relevant to the areas that you supervise. For example, you can drill down on the Summary and Analysis pages.

Dual-tone multi-frequency signaling (DTMF)

Touchtone dialing. In DTMF, pushing a button sends a combination of two tones: one high-frequency tone and one low-frequency tone.

Duplicate Case

An open instance of your business process that is very similar to a Case that already exists and both Cases are designed to reach the same result. For example, if your business objective is to review loan requests, your application creates a duplicate Case when a user creates the same request twice. To maintain good quality of your business processes and save time, avoid researching, updating, and resolving both Cases by identifying and eliminating duplicate Cases. For example, you can identify all loan requests that include the same customer email address.

Dynamic layout

A layout that organizes UI elements on the screen in a variety of ways. For example, you can use dynamic layouts in forms to determine item and label placement depending on the size of the screen that you use, such as desktop monitors or mobile displays. You can also define how dynamic layouts behave on mobile devices to improve readability by defining how much content is displayed on the screen at a time.

Dynamic Select control

An optional feature that you can add to user forms (through HTML rules, harnesses, or sections) and other HTML forms to make user input faster. The Dynamic Select control is deprecated, but supported. Use the Drop-down control (pxDropdown) instead. As a best practice, upgrade Dynamic Select controls to Drop-down controls.

Dynamic system setting

A data instance that is used to change the performance of Pega Platform. Dynamic system settings that have Pega-Engine as the owning ruleset and key names that start with prconfig are known as prconfig settings. For easier maintenance, create a dynamic system setting data instance and set the value of the data instance to a prconfig setting, instead of directly updating prconfig settings.

Dynamic View

A standard form that is automatically managed by your application for each Case Type that you define. A dynamic view displays fields from your Data Model during different events, such as creation and resolution, in the Lifecycle of a Case.

E

EForm file

A file that contains a PDF file that is used as a template for generating new PDF documents. The corresponding eForm map specifies the relationship between the form fields in the PDF form and properties in your application. The eForm file and eForm map rule forms constitute the SmartForms feature.

Efficiency score

A numeric value that indicates the amount of waste in a workflow. This score compares production and other work time to total time. Higher scores indicate lower levels of waste.

Embed- base class

A parent to other classes that, by design, should not be used as top-level structures. No saved instances of concrete Embed- classes exist. A class that is derived from the Embed- base class is used only for embedded clipboard pages. Developers can create rules that apply to embedded instances and execute the clipboard instances of the

Embed- class, but the embedded instance is either saved as a page within another object or is not saved at all.

Embedded page

A Clipboard page that is a child of another page.

Empathy mapping

A technique that ensures a human-centered focus during a Design Sprint. Users are interviewed and observed in the context of their environment as they perform real tasks; the user narrates what they are doing as they complete the task, the observer asks questions to gain insight into the discrete steps and get to the underlying thought process.

Employee focus

A measure of how employees allocate their time and actions during the day. This usually falls into one of the following categories: Production Work, Other Work, Non Work, Idle, and Unknown.

End-to-end (E2E) testing

A testing approach that systematically tests all paths through a Microjourney to prove interfaces, low-level user acceptance criteria, and Microjourney-level acceptance criteria. Testing may be done on incremental chunks of the Microjourney as they are completed in sprints and then on the full E2E journey after its completion.

Entity

A piece of data that can be extracted from text, including names, locations, amounts, IDs, and so on.

Entry point

A point in a flow that controls to which places in the flow users can move. Assignments and subprocesses are commonly marked as entry points, because these are places in a business process that require human input.

Epic

A description of a capability that takes more than one sprint to implement.

Escalation

An action that your application runs to facilitate faster resolution times, based on a specified service-level agreement. For example, you can send correspondence to interested parties when a Case is five days overdue. Use the Service-level agreement form to configure escalation behavior in your application.

Executable

A computer file that contains an application that you can run.

Execution context

A single run of a Pega Robot Studio automation. Each execution context is started with an event, such as a button click. Any links started as a result of a button click are part of the same context. If an automation calls another automation, the links executed in the second automation are part of the same context. Any child threads that are created are also part of the same context.

Expected employee hours

Associate’s hours for a specific workday. This information is used to complete the picture of associate focus for a day.

Exposed property

A single-value property that is stored as a column in a database table, in addition to the Storage Stream BLOB, to enhance record selection operations in reporting. Exposed properties are also referred to as "optimized properties."

Expression

A single line of Launchpad Studio syntax that provides computation of a value by using arithmetic operators, logical operators, Java operators, Functions, and properties. On many forms, you can use the Expression Builder for guidance while entering an Expression.

Expression Builder

A tool for authoring logical Expressions in the Pega Expression Language. The Expression Builder helps you construct Expressions by providing lists of Rules that you can use, as well as a large input area.

Extension point

An activity (or other rule) that is designed to be overridden to meet application needs. Many such rules are empty stubs that contain no steps. Typically, the overriding rule is in a derived class.

External assignment

A task that an external user performs in response to an email message. By collecting information from stakeholders who are outside your organization, you can broaden the scope of your application.

External class

A concrete class (an instance of the Rule-Obj-Class rule type) that corresponds to a table in an external relational database, rather than to a table or view in the PegaRULES database. You can create an external class and associated properties by using the Connector and Metadata wizard or the New External Database Table Class Mapping button on the Data Model Classes and Properties landing page.

External data entity

A class that is a data type of the current application and appears in the Data Explorer. Records of the data type come from an external data source.

External data source

A data source of the connector type, a lookup with an externally mapped Applies To class, or a report definition with an externally mapped Applies To class.

External user

A person outside your organization who processes external assignments. External users do not log in to your application because they receive an email with a direct link to an assignment instead.

F

Family name

A text string that consists of all the key parts concatenated with exclamation points, excluding the Applies To or class name portion.
For example:

- Two activities named Work-MyCo-Mortgage.Reopen and Work-MyCo-.Reopen both have REOPEN as the family name.
- When a binary file rule has three key parts defined as webwb, pegalogo, and gif, the family name is WEBWBPEGALOGOGIF.

Favorite

A link to a rule or data instance. Use a favorite to quickly find items while working in Dev Studio or the Case Manager portal. You can create favorites that are visible to your operator exclusively, another operator, or all operators within a specified access group.

Feature

A capability that you implement in your application. By defining features that are linked to rules and work items, you can improve the traceability of capabilities to their respective implementations.

Federated Access Manager (FAM)

An application that Pega staff can use to request access to a company system and to a Pega facility for themselves or another person.

Federated Case Management (FCM)

A centralized database where each local application in a federation publishes its own Cases and data. FCM uses the Pega Web Mashup connectivity to link Pega Platform applications in a federation. Users in a federation work in their local application portal, which can display Cases and assignments from other applications in the federation.

Federated Case Management Repository (FCMR)

A centralized repository for Cases and work performed by users in a federation. The FCMR consolidates work items and makes them available to all users in the federation.

> **NOTE:** Deprecated starting from Pega Platform '24.2.

Field-level auditing

A method of tracking changes over specific fields in your business process. You can analyze progress and maintain compliance as to who made the changes and when. For example, in a shipping order process, you can track how a shipping address changes, and who and when performs the change. In Case of any issues with the shipping address, you can view details about the change and further investigate the problem.

First call resoultion

See First contract resolution.

First contract resolution

Percentage of interactions resolved on the first interaction and thus not requiring a repeat interaction initiated by the consumer.

First touch resolution (FTR)

Percentage of interactions that are resolved during the initial interaction by a single CSR, also known as "transfer rate".

Flow Action

An activity that controls the way that users interact with forms that they need to fill in to complete their tasks. The Flow Actions associated with a task determine the choices that are available to users as they perform the task. For example, in a damaged goods claim process, the buyer can select to have the goods either reimbursed or replaced.

A **Connector Action** is a Flow Action that you configure in a connector, which is a line shape that exits from an Assignment or Assignment Service shape; completes the Assignment and advances the Case to the next shape; can specify likelihood values that indicate the expected percentage of times users are likely to choose each action.

A **Local Action** is a Flow Action that you configure in the properties pane of an Assignment shape; updates the Assignment but does not advance the Case to the next shape; serves as an alternative to autogenerated controls.

NOTE: You can add common or custom local Flow Actions to your Case Type on the Optional Actions tab of the Case Workflow. Actions that you add this way are available as Case-wide or Stage-only Actions. Additionally, you can enable the bulk processing option for a local Flow Action, with which you can use the Action on multiple Cases or Case Assignments in a list View on a landing page.

Flow error

An error condition that prevents a flow execution from continuing. An example of a flow error is if the flow references a rule that is not found at run time. Click Dev Studio > Processes and Rules > Processes > Flow Errors to view the flow errors in your current application.

Flow form

A view of a Process Rule in your application. The Diagram tab on the Flow form gives you access to Process Modeler, in which you can use graphical shapes and connectors to define a sequence of events in a Process.

You can access the Flow form in the following ways:

From the Records explorer:

1. In the navigation pane of Dev Studio, click **Records**.
2. Expand the **Process** category, and then click **Flow**.
3. In the list of Process Rules, double-click the process for which you want to open its Flow form.

From a Process in a Case Lifecycle:

1. On the **Workflow** tab of a Case Type, click **Life Cycle**.
2. Hover over a Process in a Stage, and then click the **Configure Process** icon.
3. On the toolbar, click **Open Process**.

Flow marker

A rule of type Rule-AutoTest-Case.RunRecursiveTestSuites that supports the testing of flows. If an operator has the AutomatedTesting privilege, that operator can create and use these flow markers. Flow marker rules belong to a RuleSet and version, but they are not included in the Application Explorer display.

Folder

A Case in a concrete class that inherits from the Work-Folder- class. A folder object holds a collection of one or more Cases, including covers and other folders, to provide access for analysis and reporting.

Form

A view of your data that displays information or collects input from users as they create, update, and resolve Cases in your application. Open your Case Type from the Application Explorer to access the options for configuring a form.

Forward chaining

The automatic propagation of changes in one property value to changes in other property values or to indexes. This process only operates when the source properties are not marked as invalid. If a property has an associated message, forward chaining halts.

Fragment

Text or HTML markup that is expected to have broad reuse. You can reference a fragment in the Include JSP tag to cause the system to incorporate the Fragment Rule into other HTML or Correspondence Rules as they are processed. A fragment is an instance of the *Rule-HTML-Fragment* Rule type or the *Rule-Corr-Fragment* Rule type.

Framework application

An application that you can extend and modify to create implementation applications for a specific organization, division, or organization unit.

Framework class

A class that defines a common work processing foundation that you extend and modify as implementation applications for an organization, division, or organization unit. Framework classes belong to the framework layer of an application.

Framework layer

A layer that contains reusable application elements and provides an application that you can use as the basis for many production applications.

Friction score

A numeric value that indicates how much interaction is required to complete a step or workflow. This score is based on the steps, key presses, clicks, and scrolls in a workflow. Lower scores indicate higher levels of friction.

Function

An element that defines a Java Function and makes the Function callable from expressions. A Function is an instance of the Rule-Utility-Function Rule type.

Funnel chart

A chart that displays the progressive reduction of data as it passes from one phase to another. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

G

Gauge chart

A chart that displays a single value as a meter reading. If the gauge chart includes thresholds, a manager can quickly review the chart to determine whether the value is within a targeted range. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Geolocation tracking

A method of capturing the longitude and latitude coordinates of Case workers as they process a Case. When you enable this feature for a Case Type, you can view the location of the Case worker in Google Maps. You must include the UI-Kit-7 ruleset in your ruleset stack to use geolocation tracking in your application.

Get Next Work

The Get Next Work function helps you define the order in which users work on open Assignments. Each time a user completes an Assignment, Get Next Work selects another Assignment for that user based on a set of criteria, such as user authority, skills, or urgency of the work. For example, if a customer service representative is skilled in credit card compliance, the Get Next Work function can assign that person to most urgent work on Cases which require that skill. By choosing the best, most appropriate assignment to work on next, your application can promote user productivity, timeliness of processing, and customer satisfaction.

Global resource setting

A property value on a data page that is referenced through specific syntax on a connector rule, or by a data instance that supports a connector. A global resource setting can reference any property of the appropriate type on a data page. The use of global resource settings for references to external systems, rather than fixed text values in rule forms, provides greater flexibility for changing values such as port numbers, addresses, and URLs.

Goal

An interval of time that is defined in a service-level agreement. It is the suggested resolution time for an item, such as a Case or stage.

Grid Controls

Controls that display the relationships between large quantities of data and provide a convenient interface for editing or adding to that data. Grid controls appear in Harness and Section forms. For large or complex data displays, use the Grid, Tree, and Tree Grid controls.

Grid layout

A layout that displays values of a Page List, Value List property, data page, or a report definition in a spreadsheet format. When a grid is bound to a data page or report definition that accepts parameters, and the parameter value uses a property reference, the grid is automatically refreshed whenever the property value changes. The grid is created dynamically and has as many rows as needed to display the requested data. The grid can be read-only.

Guardrail compliance

The Pega Platform feature being used influences what constitutes guardrail compliance. Generally, guardrail compliance avoids the use of custom code in the application model. This is important because the features of Pega Platform are designed to protect the security of an application, and often times, cannot be adequately applied to custom written code.

Guardrail

A setting that determines which elements in your application do not comply with Pega best practices. For example, guardrails typically flag custom components that require manual changes during upgrades. You must respond to guardrail warnings to ensure that your application meets the latest requirements for efficiency and ease of use, and save development time.

Guided tour

A sequence of tour stops that provides information, tips, and instructions about the key features in your application. Use the guided tour form to define the content that is displayed in each tour stop.

H

Handle

A permanent, unique identifier for a class that includes certain key parts, and the creation date and time of a single instance for rules and some classes. A handle is sometimes known as an internal key. The pzInsKey property holds the handle value for an object. The pzInsKey property is undefined until you save the object.

Harness

A container that organizes the content and structure of a page in the user interface. The layout of a harness is defined by a template. For example, you can base a portal harness on a template that divides the portal into three separate areas: a header, a navigation pane, and a large content pane for displaying documents.

Headless application

An application that uses flows and other elements, but either does not have a user interface or presents forms, assignments, and other information to users through an external mechanism. An application that delivers straight-through processing can be named headless.

Heat map

A graphical representation of data where the values taken by a variable in a two-dimensional map are represented by colors. From the Heat Map tab on the Application Inventory landing page, you can view a heat map of the rule types in your application, summarized by category.

Hierarchy

A definable structure that you can use to organize your workforce into logical groupings and reflect who reports to whom. Pega Workforce Intelligence uses the hierarchy that you define for reporting and analysis. You can label the levels in the hierarchy to match the company's business structure, such as divisions, departments, supervisors, managers, associates and so on.

Historical processing

A feature that enables an application (for the current requestor) to operate based on how rules were defined on a specific date. Such processing is useful to reconstruct past behavior or apply past policies. Historical processing applies to an entire ruleset version, not a single rule.

History type

A setting that identifies the event that corresponds to a history instance for a Case. The history type is recorded as a single letter value in the pyHistoryType property.

History- base class

An abstract class that is parent to numerous other classes that define cumulative tracking data about the objects in your application, including rule instances. History instances identify the date, time, and user who updated a work item, rule, or other object in the system.

Hotfix catalog

A repository of information about all Pegasystems hotfixes. The catalog describes the changes in each hotfix and is used for dependence checking. Obtain the latest hotfix catalog from the Support area of Pega Community.

I

Idle

An extended period of time during which the associate does not interact with the keyboard or mouse.

Idle time

One of the two characteristics:- The time that a CSR is unavailable for servicing customer requests while they are working.- The amount of time that is spent idle, with no input from the associate, shown as both an amount and a percentage of total time. This value is defined by the Workforce Intelligence team.

Implementation class

A class that defines the extension, reuse, and specialization of assets in a framework class layer to meet the business requirements of an organization, division, or organization unit. Implementation classes belong to the implementation layer of an application.

Implementation layer

A layer that contains application elements that are specialized for a specific business audience or purpose. The contents of the implementation layer extend the elements of the framework to create a composite application that targets a specific organization or division.

Implementation methodology

An adaptable process framework for managing an application development project. When you align your organization's approach to project management with an implementation methodology, you can quickly define and implement the objectives of your application.

Inbound email processing

A utility for managing the email messages that you receive in your application. When an email message arrives, Pega Platform reads the message, pulls it into your application, and creates a work item. For example, you can configure your application to create Cases based on the information in the body of inbound email messages.

Index

A value that identifies one element (or member) of an aggregate data structure. These indexes are sometimes called subscripts. In addition, an index is a PegaRULES database feature that provides faster access and improved database performance. Use Declare Index rules to add and delete index objects.

Index- base class

An abstract class that is the ancestor of other concrete classes that define indexes, sometimes called secondary or alternate keys, that are stored in the PegaRULES database. These alternate keys are used by the system to speed searches and provide sorted lists to help users find instances (such as work items) where the external key is not known but some other fact or property is known.

Indirect page

A page that the system finds by searching the clipboard at run time. The page reference to an indirect page starts with the keyword prompt followed by the page name. This type of page is deprecated but still supported for rules that used this feature before Pega 7.1.

Insight

Insights help you conveniently explore and analyze application data, such as company sales, bugs, and team assignments. You can use Insights to retrieve specific data, and present the data as a comprehensive table or an interactive chart. For example, in a sales application, you can visualize data about profits that your company generates in specific regions, and then analyze the distribution of earnings across various categories of products.

Instance

A durable, potentially permanent, saved representation of a concrete class that is stored in the database. An instance corresponds to a row in the relational database, or to a record. An instance consists of properties and values, and some of these property values form a unique key to the instance.

Instruction

A command that initiates an action for a row on an activity form. The instruction keywords are Call, Collect, Branch, Queue, Rule, and Java.

Integration Designer

A tool that shows all the business objects, data Views, object dependencies, and external systems in an application.

Integration service

A facility that supports interfaces between Pega Platform and external systems. Integration services include both connector and service capabilities. They are supported by the Pega-IntSvcs ruleset.

Integrator shape

An Activity that connects your application to an external system. For example, a work item reaching an Integrator Integrator shape in a flow diagram might run an Activity that automatically queries an external database to obtain current prices or current inventory levels.

Intelligent routing

The process of comparing the characteristics of a new assignment with the characteristics of the workforce to route the assignment to the most appropriate operator. Like a supervisor who thoughtfully distributes work to their team, intelligent routing in your application can significantly affect the productivity and throughput of a work group.

Interaction.xml file

A file that defines the contexts, activities, and plug-ins for the implementation that you are designing.

Interactive chart

A chart that provides options, such as a slider control, for increasing and decreasing the level of detail that is displayed. Summary view reports can include interactive charts.

Interactive voice response (IVR)

An interactive phone system that can respond to a caller input (voice or keypad) and either complete predetermined services or assist in properly routing the call to the appropriate CSR. An older term for an IVR is voice response unit (VRU). Common vendors include Avaya, Genesys, Syntellect, and Nuance.

Interested party

A work party whose role is to receive information about a Case. This party does not actively participate in processes or directly influence the outcome of the work.For example, the spouse of a cardholder can be an interested party in a credit card dispute.By default, you can associate more than one interested party with a Case Type in your application.

Interest page

The primary page that against which a flow runs. An interest page might be an embedded page of the Case, or it might be the Case itself.

Internal class

A concrete class (instance of the Rule-Obj-Class rule type) for which instances are stored in the PegaRULES database, rather than in an external database. The properties @baseclass.pzInsKey and @baseclass.pxObjClass are defined for every internal class.

Internal key

The text value of a reserved property @baseclass.pzInsKey of an instance. This property is defined in the ultimate base class and is available in every class. This value is also known as the handle. For rule instances, the date and time that the rule was first saved becomes part of the internal key. As a result, the pzInsKey property is undefined until the new rule instance is saved and committed.

Issues per contact

Average number of issues that are handled per contact based on the number of processes that are run.

Iteration

The process of repeating the same set of Actions on any given list. The Split For Each shape in a Process and the ForEach JSP tag in a stream rule both support iteration.

J

Java identifier

An identifier that must start with a letter, and contain only letters, numbers, and hyphens. Java identifiers in Pega Platform are similar to those defined in the Java language specifications, except that a hyphen (-) is displayed in place of an underscore character (_).

Java Object Mode

A property that contains references to Java objects. The Java Object property contains a reference to an instance of a Java object. The Java Object List and Java Object Group properties identify arrays of Java objects, or an unordered set of Java objects. These properties are primarily useful within the Java steps of activities and in function rules.

Java Property Mode

A property that supports the Java pages feature, which enables applications to interact with external Java objects as though they were pages and properties on the clipboard.

Journey

The series of interactions between a customer and an organization that occur as the customer pursues a specific goal.

Journey map

A way of capturing the end-to-end process in a format that helps align the team around the end objective and allow the journey to be broken down into stages and steps, and then user stories.

K

Key part

One to three fields that you specify on the Create form for every rule instance and data instance. The class rule determines the properties that form the key part for objects of a specific class, and in what order. If an object has only one key part, that value is often called the name of the object.

Keyring file

A keyring file is an encrypted file that contains the user name and password needed to access the PegaRULES database. The keyring file is usually named pegarules.keyring. If your application server supports Java Cryptography Extensions (JCE), you can identify an encryption algorithm in the cryptoelements of the prconfig.xml file to create the keyring file.

Keystore

A file that contains security certificates. To support Web Services Security and outbound email security, you can attach a keystore file to a data instance of the class Data-Admin-Security-Keystore.

Keyword

A type of entity that looks for verbatim matches of a word. Examples include salutations (Mrs., Dr.), units (feet, lbs), or days of the week.

L

Landing page

Landing pages in portals can help you provide users with the tools that they need to efficiently plan work and complete common management tasks. For example, you can set up a Teams page to help users quickly find all the teams with which they work.

Language pack

A collection of language-specific rulesets that support localization of applications. A language pack provides field value rules that localize buttons, prompts, and labels.

Layout group

A container that displays a set of content and allows you to responsively present information that is normally shown within one control type. A layout group can contain any number of dynamic layouts, column layouts, repeating dynamic layouts, or other layout groups.

Lead System Architect (LSA)

An application developer who provides technical leadership in design and project management tasks to an application development project.

Lean usability testing

A fast and effective way to test designs with a small number of users from your target audience. Embracing the lean principle of moving from uncertainty to confidence, designs are tested iteratively throughout the delivery cycle.

Least privilege access

The practice of restricting access rights for users and other requestors to only the data and application functions and features that are absolutely required to perform their job function.

Legacy agent

An agent where the Queue Mode setting on the Schedule tab is set to Legacy. Legacy agents do not use queues; instead, they process each item to completion in a single pass. Agents created before version 5.4 appear as legacy agents in later versions until they are upgraded to Standard.

Legacy Webchat / Pega Chat

A deprecated user interface in the Pega Customer Service application that supported synchronous chat conversations between customers, CSRs, and chatbots. Legacy Webchat was replaced by the new React-based Web Messaging widget available in the Digital Messaging channel.

License Compliance

A tracking and reporting system that provides evidence that operations of the system comply with provisions of the Pega contract and software license. An automatic background thread known as the License Compliance daemon supports data gathering for this functionality.

Lightweight list

A run-time format for the Code-Pega-List page that supports the report display. This format is more efficient than the default format but does not support certain kinds of processing. You can specify that results display in a lightweight list for Obj-Browse methods and lookup lists. Report definitions automatically use lightweight lists.

Likelihood

A value between 1 and 100 that is an assumed or known probability associated with a Flow Action. For example, a likelihood of 66 on a Flow Action labeled Accept means that users completing an Assignment linked to that Flow Action are expected to choose the Accept Flow Action two out of three times.

Link- base class

An abstract class that is an ancestor class to other classes and identifies paired object instances in your system.

Linked property

A single-value text property that has values that are expected to match the key of an instance of a concrete class. In certain user interface and other rule configurations, linked properties can improve performance and eliminate the need to create a special-purpose activity. You can reference properties of a linked object, retrieved by a linked property, in a rule form or expression using the syntax .LinkedPropertyName.ObjectPropertyReference.

List view rule

(Deprecated) A rule that defines a list view report that displays unsummarized or detailed data. Re-create the custom list view reports that you need as report definitions. The last version of Internet Explorer that list view rules support is Internet Explorer 11.

Load balancing

A technique or facility that attempts to provide an even backlog of demand across multiple processors or production facilities.

Local data storage

A feature that lets you store data records for a data type without having to manually create or maintain database tables. In the Data Designer, you can access the local data storage on the Sources tab for the data type. Use the Local Data Storage wizard to create a local data source.

Local Flow Action

An optional task that users perform while processing a Case. This type of Flow Action does not move a Case closer to resolution.

Local variable

A text string that is stored in a Java StringBuffer object rather than in a page structure. Local variables require less memory and can be accessed with less computer overhead than parameters. Activities can access local variables.

Locale

One of the standard codes in the format aa_BB_CC, where aa represents the language and _BB or _BB_CC represents a country variant suffix. Every user session has a locale setting that can affect the language presented by the Pega Platform user interface when displaying or entering dates, times, and monetary values.

Locatable page

(Deprecated) A page that reduces the need for the page to be explicitly named in the rule. At run time, the system uses backward chaining and an activity with type Locate to find and add the correct page to the clipboard. Locatable pages can be used with Constraints and Declare Expression rules. Locatable pages are not supported; use a data page instead.

Lock

A mechanism that secures an object or a ruleset version against changes. You can lock ruleset versions, instances of a concrete class, and the Rule-Application rule type.

Log- base class

An abstract class that is the parent of several standard classes that record cumulative chronological data about events in the system. You can access Log- classes and (for concrete classes) their instances through the Application Explorer. For concrete classes that are derived from the Log- base class, the property @baseclass.pxCreateDateTime is usually the final (or only) key part.

Lockup list cache (LLC)

A cache of recent search results that are available for display and reuse. This cache includes the results of certain reports and other searches that users run, which are saved automatically.

M

Map

A chart type that displays geographical data distributed by categories, regions, or entities on the map. For example, you can show sales activity by state, by country, or by continent, depending on the map that you select and the data that is available in the report. On the Maps tab of the Reporting Settings landing page, you can set default mappings between specific maps and the properties of specific classes.

Map value

A Rule that converts one or two input values, such as latitude and longitude numbers, into a calculated result value, such as a city name. The Rule uses ranges for the input values and a matrix to look up the result.

Messaging API

An application programming interface (API) within Digital Messaging Manager that enables Pega customers to receive and send messages in real-time on multiple messaging platforms. This API eliminates the need to handle the complexities associated with implementing each platform's APIs or SDKs.

Method

A Pega Platform method, distinct from a Java method. An operation that can be performed by one step of an activity (Rule-Obj-Activity rule type), or by a Parse Structured rule (Rule-Parse-Structured rule type).

Microjourney

Microjourneys are elements of a larger customer journey that are tied to specific outcomes. For example, applying for and getting a loan or inquiring about and resolving a billing inquiry are microjourneys that can be managed by Pega.

Minimum Lovable Product (MLP)

Minimum Lovable Product (MLP) is the smallest amount of release functionality with meaningful value that can be put into production in under 90 days. The business must prioritize what capabilities need to be included in MLP1 and subsequent MLPs based on the business value and complexity or level of effort to build.

Missing hours

The difference between the hours an associate or team was expected to work and the actual hours captured by Pega Workforce Intelligence. For example, if an associate was expected to work 40 hours and only 36 hours were captured, that associate would have four missing hours.

Mixin

A reusable style pattern defined in the skin. Mixins can define a combination of reusable text, border, or background styles.

Mobile

Tools to develop apps that work on a wide range of mobile devices. By building native apps that users can install on their Android and iOS devices, you can use mobile capabilities and improve the user experience. For example, Pega Mobile users can access their content at all times, which helps them be productive regardless of network connection status.

Mobile Messaging SDK

A software development kit (SDK) that enables Pega customers to use native Android and iOS mobile apps for interaction with Digital Messaging chatbots.

Mobile Preview

A set of interactive icons that allows you to emulate the appearance of your application on different devices and orientations. Use this tool to understand how your user interface is displayed on a full screen, laptop browser, tablet, or phone. To enable Pega Mobile Preview, select Mobile preview from the operator menu in the Case Manager and Case Worker portals.

Mobile web

Refers to the use of browser-based internet services from handheld mobile devices, such as smartphones or feature phones, through a mobile or other wireless network. Pega Mobile Client™ apps can display web pages from the mobile web.

Modal dialog box

A form to complete or a statement to acknowledge that opens in its own window. Users cannot continue with other work until they submit the form or dismiss the modal dialog box. A Flow Action provides the sections that contain the fields that the user must complete.

Modal flow

Representation of a process in a series of modal dialog boxes. The modal dialog boxes display only Action sections; harnesses are not displayed. You start modal flows by clicking button, link, or icon controls, or from context menus or menu bars. When the flow starts, you cannot continue working in the main user form until the modal dialog box closes.

N

Named user

A classification of an operator ID that is used in the License Compliance facility. Typically, an operator ID instance identifies a named user if the License Type field on that tab is set to Name.

Native app

A mobile application developed and optimized to work on specifically on the device's operating system, making full use of its features and capabilities, such as push notifications. Pega Mobile Client™ generates native apps for Android and iOS.

Native control

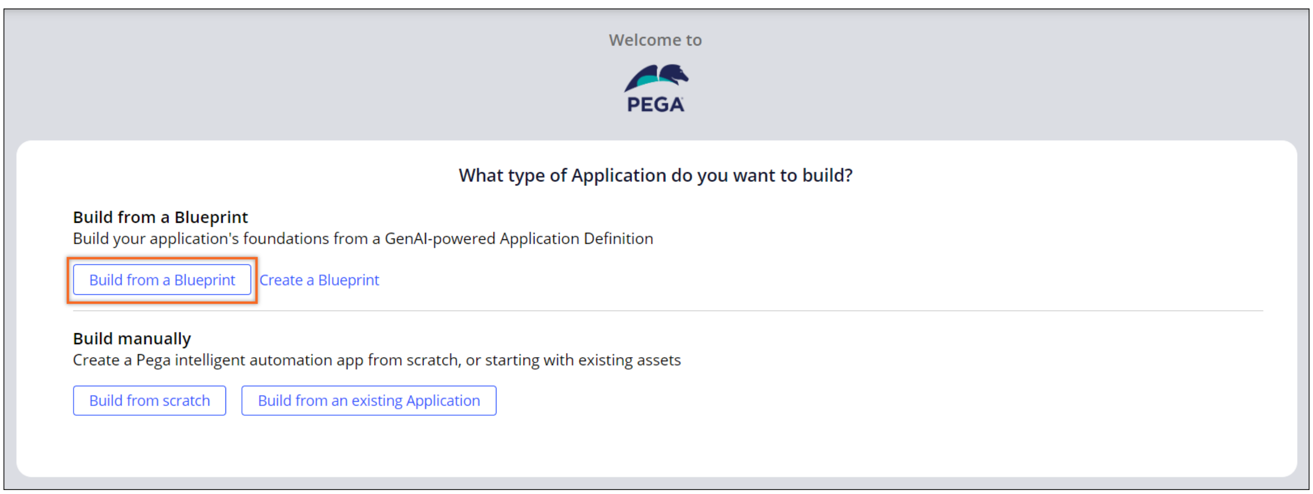
A control in the application that you are automating.

Navigation pane

The left panel of a portal that provides access to data and tools that are relevant to your role.

New Application wizard

A tool that uses customizable application types to create applications. After you specify the required information in the wizard, the system creates an application with the required Case Types, data types, Access Groups, and Operators. The following figure shows the option to build from a Blueprint highlighted:



Building from a Blueprint *in the New Application wizard*

Node ID

A unique 32-character identifier for each node of the Pega Platform system.

Non Work

A defined category of associate focus that indicates the time that is spent in non-work-related applications and websites. For example, this time could indicate that the associate was on Facebook, Pinterest, or some other social media site. Your Pega Workforce Intelligence administrator defines which applications and websites are categorized as Non Work.

Notification

Notification Rule is part of the **Process** category and determines how a notification is processed and delivered. A Notification Rule is a required parameter for the **Send notification** Step.

By default, Pega Platform™ provides a notification widget in the Web gadget Channel and Email Channel for delivering notifications. You can configure both these delivery methods on the **Channels** tab of a Notification Rule form. If you define custom notification delivery Channels, those channels are also available on this tab for configuration.

Notification Channel

A communication medium through which the application notifies users about important events. For example, a bank can send push messages to users to inform them about transactions in their accounts. Your application can include Web gadget, Email, and Mobile notification Channels, but also supports the creation of custom channels, such as those using text messages.

Notify activity

An activity that sends an email as correspondence to one or more of the work parties that are identified in the work item, and reports progress to that party. For example, when referenced in a flow, a notify activity sends correspondence when an assignment is created.

O

Occasional user

A classification of usage for an operator ID instance for a time period, such as a calendar month, by the License Compliance facility. This facility can classify an operator ID as an occasional user during one period, but include the operator in another classification in other periods.

Off-computer reason code

A code that defines what the associate was doing away from the desktop, creating idle time on their computer.

Open assignment

A task in your business process that has not been completed yet. By analyzing open assignments, you can determine what actions you need to take to resolve a business process. For example, in a process of reviewing job candidates, an open assignment might inform you to collect personal details from a candidate.

Open instance

An instance that is copied from the database to a clipboard page. Usually, an open instance is locked so that only one requestor can update it at a time.

Operator

An application user that is identified by the user name, password, and other details. Each operator has a role, such as Case worker or customer service representative, that determines what actions the user can perform.

Operator menu

A menu that provides access to your operator profile and a number of features, depending on which studio you are using and your application configuration.

Operator profile

A collection of facts and values about the operator and the requestor. Many details are derived from the operator ID instance and other data instances. To display your profile in Dev Studio or from the Case Manager, Case Worker, WorkManager, or Manager portals, select Profile on the operator menu. The system assembles this information as you log in.

Opportunity Finder

A tool that identifies and presents areas of opportunity for you to potentially increase the efficiency of your organization. For example, using this tool on the Analysis tab can show times when the expected production goal was not met, or when too much time was spent using non-production applications, such as an instant messenger application.

Opportunity tag

A label that indicates the default opportunity types.

Optimized property

A single-value property that is stored as a column in a database table, in addition to the Storage Stream BLOB, to enhance record selection operations in reporting. Optimized properties are also known as exposed properties.

Organization

The top level of the three-level organization hierarchy that is available for use in all of your applications. The organizational structure affects the management reports, statistics, and rules that are available to users in that organization. One system can support multiple organizations. An organization is an instance of the Data-Admin-Organization class.

Organization hierarchy

The structure of your organization in three levels. The top level is an organization, for example a bank. The middle level is a division that includes all resources and functions necessary to operate, such as an HR department. The most granular level is a unit that represents a team or a group of related teams, such as an HR payroll unit or an HR benefits unit. Aligning a user in the hierarchy can impact the management reports, statistics, and application elements that are available to a user. When routing work items, the system considers the user's alignment in the hierarchy to enable efficient and intuitive management of work. For example, you can ensure that the application routes approval tasks only to managers.

Organization ruleset

A ruleset that applies to all operators in an organization. You specify this optional ruleset in the Default Ruleset field of the Details section of the Organization data instance (Data-Admin-Organization class).

Organization unit

The lowest level of the three-level organization hierarchy that is available for use in every application. An organization unit is an instance of the Data-Admin-OrgUnit class.

Other Work

A defined category of associate focus that indicates work performed outside of production applications or websites. For example, this category could indicate that the associate was preparing a training class or documenting procedures for new associates. Your Pega Workforce Intelligence administrator defines which applications and websites are classified as Other Work.

Outcomes

Outcomes represent how a customer responds to a personalized Next-Best-Action Decision in a specific channel. Outcomes are properties, which Pega Customer Decision Hub uses to predict customer responses and to record the results of actual customer interactions. In predictive modeling, outcomes are the results that you want to predict based on the available predictors, which are properties that might show an association with the predicted outcome. In reporting, outcomes are the results that Pega Customer Decision Hub records in the interaction history. Outcomes can be associated with positive or negative results. For example, in a binary outcome model, you might have two outcomes: `Accept` and `Reject`, which represent whether a customer is likely to accept or reject an offer.

Overall score

The overall health of the workflow, based on the efficiency, complexity, and friction scores of all paths in the workflow along with other criteria. This score is a weighted average that helps you determine which workflows might require more analysis.

Overlay

Overlays are used to show a small piece of related data or smaller flow for a specific element on the screen. An overlay can show supplemental data such as advanced controls, explanations, or help.

P

Package

One of the following solutions:- A file that contains code or a code library that you can import in a library rule or function rule. You can import external Java packages or customer packages (also known as service packages).- A deployable solution that is ready to be used by Pega Robot Runtime. A deployment package contains two files with the .openspan and .manifest extensions. The .openspan file contains the specific adapter, translators, and custom components that make up the solution. The .manifest file contains a list of the contents of the .openspan file, along with project version information.

Page

A data structure that holds name-value pairs. Pages are stored in the system memory or in the database. Various types of pages are defined in the system, such as Data Pages that are created when the data is referenced, named and unnamed pages, parameter pages, and Clipboard pages. Every unit of information in an application is a pairing of a name and a value, known as a data element.

For example, a data element that stores the email address of a customer has the name "email," and the value "john.smith@company.com." Pages store data elements so that the application can use it to process the Case.

Page group property

A data structure that consists of an unordered list of zero or more pages, where the sequence of pages is not significant.

Page list property

A data structure that consists of an ordered list of zero or more pages, where each page is identified by a numbered subscript.

Page message

A text clipboard value that is generated by the system and associated with a page. A typical page message conveys error conditions, progress, and exceptions.

Panel set

(Deprecated) A configuration of panels (areas) in a harness that support a composite portal. Existing panel sets continue to function. As a best practice, upgrade panel sets to screen layouts.

Parent Case Type

A Case Type that sums up results of supporting business processes to lead to an ultimate, expected goal. The supporting processes are referred to as child Case Types.

For example, if your parent business process is to review car accident insurance claims, then reviewing bodily injury and vehicle damage claims are child Case Types. By creating parent Case Types, you can resolve complex and multifactored business processes by reusing smaller, modular child Case Types.

For greater flexibility, you can start working on a child Case Type only when it is applicable to your current business needs. As a result, you save time and make your application relevant in various scenarios.

Parent Process

A Process that contains a shape, such as the Subprocess shape, that calls another Process.

Participant

A person who is directly involved in a business process, such as a customer service representative (CSR), or a person who does not directly work on a business process but has a stake in the process, such as a manager. Participants can be members of your organization, for example a CSR, and users without an account in your application, such as a customer that creates a loan request though a website. To speed up Case resolution and enhance communication, you can create participant categories, so that you can communicate with an entire group at the same time, for example, by sending an email to everyone in a group.

Path

A set of variations of the same workflow. Paths allow an analyst to compare process steps between these variations and see what differences have affected any KPIs that the analyst is monitoring.

Pattern inheritance

An optional method where a class inherits characteristics from other classes and affects the first steps in the rule resolution algorithm. The name of the parent class is based on an initial portion or substring of the name of the class. Pattern inheritance is set in the Rule-Obj-Class rule.

Pega Catalyst

Pega Catalyst™ is an engagement methodology and offering that uses business outcomes, precise problem definitions, design thinking, and rapid prototyping methodologies to design better enterprise technology solutions.

Pega Cloud

Pega Cloud provides a secure and robust infrastructure environment for Pega Platform™ and Strategic Applications, including important cloud services such as incident response, change management, data backup, and disaster recovery. Environments have high levels of security and data integrity, and distributed denial of service protection. Also called Pega Cloud Services.

Pega Express Delivery

An agile and design-centered delivery approach based on successfully delivering a Minimum Lovable Product (MLP) release made of up one or more customer journeys that are quickly implemented. There are four phases: Discover, Prepare, Build, and Adopt.

Pega Express test plan

A path through the application that guides the test team towards testing use Case by use Case, in the order in which journeys, microjourneys, and solution capabilities are developed.

Pega Web Mashup

A tool, previously known as the Internet Application Composer (IAC), for embedding a Pega Platform application as a gadget on the pages of a Pega composite application. Pega Web Mashup supports the rendering of user interfaces in the HTML5 document type.

Pega Workforce Intelligence administrator

A person who has been set up to administer the Pega Workforce Intelligence application. You must be assigned the Administrator role to view all the options on the Administration tab.

Pega Workforce Intelligence analyst

A person who has access to the Summary, Timeline, and Analysis tabs of Pega Workforce Intelligence, and is typically focused on improving processes. The information on these pages is helpful when in automating tasks. You must be assigned the Analyst User role to view the Analysis tab.

Pega Workforce Intelligence report user

A person who has access to the Summary and Timeline tabs in Pega Workforce Intelligence, but not the Analysis tab. Report users can also view the Administration > Shift Updates menu.

Pega Workforce Intelligence

A cloud-based analytics solution that is designed to improve the understanding and productivity of your workforce.

Pega composite application

A Pega Platform application that is embedded on your company web pages as a gadget, without using a portal rule. Pega composite applications do not support all operations that are normally allowed in Pega Platform applications. You can use Pega Web Mashup to build and test a Pega composite application.

Pega log

A log, also known as the console log or system log, that contains error messages, debug messages, information messages, and Java-related diagnostics that have been created since the server was most recently started. The Pega log uses the naming format

PegaRULES-YYYY-MMM-DD.log, where the date portion of the name indicates the date the application server was recently started on the current node.

Pega unit testing

A feature that automates the testing of rules. Use unit testing to automate the out-of-the-box Pega features that are available to the delivery team during the Build phase.

PegaRULES Log Analyzer (PLA)

A Java program that can parse, consolidate, and summarize logs from the Pega log, the alert log, and Java virtual machine. Use PLA results to identify, diagnose, and resolve issues that might affect performance, stability, or scalability.

PegaRULES database

A relational database that holds the rules, data instances, work items, history, and other concrete objects from the internal classes of the Pega Platform system. External classes are not part of the PegaRULES database.

Pending status

A status on a work item that indicates that the work item is open, but progress is paused or halted temporarily while the organization is waiting for information, a decision, a signature, or other events from a party outside the organization. A pending status does not alter the goal times or deadline times for the assignment. Your flows can use the standard router activity named Work-.ToDeferredWorkbasket to place work items with a pending status into a work queue named deferred@org.com.

Performance testing

The traditional tests of load, stress, soak, and scale. This testing type is typically performed by the client's team.

Performance tool

A utility that provides server demand statistics for the current user since their login, or since the last time you reset the Performance tool statistics to zero. These statistics include detailed performance information about running activities, when condition rules, and data transforms that you run in your requestor session. You can use these results to tune your rules for improved server performance.

Persistent object

An object instance that was saved from a requestor's clipboard into the PegaRULES database. A persistent object can be accessed and used by other requestors and remains in the database after the requestor session ends. Generally, pages can become persistent when they belong to a concrete class, have a non-blank key defined, and have passed validation.

Persona

A type of user that interacts with your application and has access rights that correspond to the tasks that are typical for their role in the organization. For example, in an application for hiring job candidates, you can create Personas that represent a hiring manager and an HR worker. By creating Personas, you analyze what people you need to involve in your business process to reach a successful resolution. You also define what channels you need to provide so the users can interact with your application. For example, job candidates can access a recruitment application through a browser-based web channel or through a mobile Channel that relies on a mobile app. At the same time, you can set up a second, more utilitarian web Channel to accommodate professional users, such as HR workers.

Personal Ruleset

A Ruleset with copies of rule instances. Personal Rulesets are used with the check out and check in features. A personal Ruleset is sometimes called a Private Ruleset.

Pinned class

A pinned class allows you to access objects across inheritance hierarchies without explicitly switching contexts. Pinned classes are stored by access group for your operator ID and persist between sessions until removed. To pin a class, add the class to the static Pinned Classes section of the Application Explorer.

Portal gadget

A rectangular area on a traditional (fixed) portal, as opposed to a composite portal. Each gadget contains a control with which the user can interact. For example, the worklist area of the worker's home page is implemented through a gadget. Gadgets are defined through activities that apply to the Data-Gadget class. By creating a portal rule (Rule-Portal rule type), a developer determines which gadgets are visible to which groups of users. Using such rules, you can control the appearance, labeling, and location of gadgets on a portal layout.

Portal

Portals are interfaces that provide users with an organized set of work tools. Users navigate the application, collaborate, and complete work assignments mainly through Portals. Portals contain a navigation menu that leads to various landing pages and dashboards, as well as a menu for creating new work items. Additionally, Portals might also include widgets that improve work efficiency, such as a message feed.

Prconfig setting

A name-value pair that affects the operation of the Pega Platform system. Many prconfig settings have a default value. If no other value is explicitly assigned, the default value is used.

Prconfig.xml file

A file that defines installation and operating parameters for a Pega Platform node.

Precondition

A reference to a when condition rule (Rule-Obj-When rule type) or an expression that is associated with one step of an activity. After the previous step of an activity runs, before the method in the current step runs, the system evaluates whether the rule or expression is true or false, and performs user-specified behavior based on the result.

Prediction

Predictions are specialized strategies that return a propensity or probability of an outcome. They are driven by adaptive, predictive, or natural language processing (NLP) models. Predictions encapsulate best practices for data science and support ready-to-go templates for multiple business use Cases. Application developers can embed Predictions in decision strategies in Pega Customer Decision Hub™ to optimize customer engagement, or add Predictions to Case Types to route or straight-through process Cases and to prioritize work, as well as to conversational channels to analyze incoming texts.

Preference

A setting in Dev Studio that is associated with your operator, or an access group tied to your operator, that you can use to customize your development experience. Some preferences are manually managed, and others are automatically detected and updated by the system. All preferences persist between sessions.

Prepare

The second stage of Pega Express Delivery that describes day to day tasks during the first weeks of the project and the expected outputs: a detailed journey map, draft working software in Pega Platform, at least two sprints of user stories and effective governance structures. The goal is a more detailed understanding of the target software, which provides enough knowledge to configure rules and start all the project processes to track and measure success.

Primary Page

In Pega Platform™, the Primary Page is a Clipboard Page with the same class as an activity (or one of a few other Rules), designated when the system calls the activity. The Primary Page is the default location of properties that are referenced with a period and without a preceding Page name, for example, *.IsVIPCustomer*.

Primary path

A set of actions that your business process follows to reach an expected goal. For example, in a hiring a job candidate process, you can create a primary path that starts with collecting documents from a candidate, goes through a job interview and a background check, and finishes with approving the candidate. Creating a primary path helps you define the order in which your business process moves most often towards resolution, and model the process in a way that most precisely matches your work. To ensure that you can resolve work in different scenarios, create alternate paths.

Primary Stage

Primary Stages define the happy path of your business process. For example, for a Review job application Case Type, you can create Stages, such as `Submission`, `Application review`, `Decision`, and `Job offer`. To handle an exception to the regular path, you can add an Alternate Stage to the Case Lifecycle.

Priority

The urgency of a Case on a scale from 0 to 100. The higher the priority, the more important addressing the open work item is. Case priority depends on the time that has passed since the Case was created, and manual or automatic adjustments that you can introduce to make some Cases more urgent than others. For example, a credit card company may assign higher starting priority to Cases that deal with reporting stolen credit cards. Consequently, these Cases are handled first. Managing Case priority helps you ensure that your team works on what is most important to your business, and improves efficiency and resource allocation.

Private Rule

Property of a Rule, one of the options of Reusability. A Private Rule can be used only in the current application and is not available in other applications.

Private Data API

An application programming interface (API) within Digital Messaging Manager that enables secure transmission of private or sensitive data, for example, the authentication state, associated with a customer’s chat session. This API ensures the secure transmission from your premises to a client’s chat session. After the API transmits the data, Pega Platform and Pega Customer Service applications can use such data in custom integrations, and CSRs can visualize or utilize that data.

Privilege

An application-specific access control element that is associated with a class and an access role. Using privilege rules in an application is optional, but they can offer improved control over access than access roles alone.

Prlog4j2.xml file

A control file for the Pega Platform logging facility that is located on each node and controls the contents of the server console output and Pega log files.

Problem Assignment

An Assignment that remains open for a long time or references a work object or rule that is no longer available. When either of these conditions is detected, the assignment status (the Assign-.pyAssignmentStatus property) is changed to Error. Problem assignments, or assignments in error, require review and analysis. To research problem assignments, use the available reports by clicking Configure > Case Management > Tools > Work Admin > Worklist Assignment Errors.

Process

The related actions that are taken during a Stage, in parallel or one after another. With Processes, you can control the order of events in your Case, in addition to who performs the work and in what manner. For example, for the Application review Stage of a recruitment Case, you can add the Conduct interview and Review collected information Processes.

Processes can include Assignments, Automations, Decisions, and Subprocesses.

Process API

An API with Rules for standard activities, Processes, and Flow Actions that you can use to start and advance Processes without using user forms. These Rules can support Pega Platform business processing through service-oriented architecture (SOA) facilities, including agents and service activities.

Process architect

A member of an application development team who provides knowledge of business rules, including processes (flows), business objectives, service-level agreements, reporting requirements, and business policies. A process architect might also be called a business architect.

Process Modeler

A tool that supports creation and modification of business processes in an application. In Pega Platform™, the **Diagram** tab on the Flow form gives you access to Process Modeler, which you can use to add shapes to a Process diagram. As a best practice, use Process Modeler after a Process is created to incorporate advanced features and functionality that are not supported in Case Lifecycle Designer.

Process page

A reserved, top-level Clipboard page (*pxProcess*) that contains information from the *Data-Admin-System* instance. Only standard activities update the properties on the Process page. The contents of the Process page are identical for every requestor on a node. This page has a Class of *Code-Pega-Process*. Use the Clipboard tool to view this page.

Process Step

A Task that helps move a Case toward resolution. Steps can be performed by users, your application, or an external application. Use the Lifecycle of a Case to add Steps to existing Processes.

Product Owner (PO)

An empowered role that sets priorities, owns the backlog of development tasks, and holds responsibility for meeting the business objectives of the solution. The PO also represents the business, acts as a single point of contact for business decisions, sets stakeholder expectations, and accepts or rejects user story completion.

Production %

The percentage of time spent in production applications and websites during the expected hours or shift.

Production Mirror

A separate sandbox service that provides an architectural replica of the scaled production environment that can be used for production staging, scale benchmark testing, and load performance testing.

Production Work category

A defined category of associate focus that indicates the work that is needed to complete a production item. This associate focus can be used for application and off-computer time reason code mapping.

Production Work time

The amount of time that is spent in applications or away from the computer that is categorized as Production Work, shown as both an amount and a percentage of total time.

Production hours

The time spent during a shift in production applications.

Production level

A property in the System data instance (Data-Admin-System class) with a value between 1 (experimental system, low security) and 5 (production). The current level is recorded as the value of the pzProductionLevel property on the Process page.

Production ruleset

A ruleset that contains rules that you can modify after the application is deployed. On the Category tab of the Ruleset form, the Ruleset Type for a production ruleset must be Standard.

Program Sponsor governance meeting

A meeting held to address cross-program issues, resolve relationship issues, and communicate current status and priorities. Program Sponsor governance meetings also confirm actions by all stakeholders.

Project management framework (PMF)

An application that implements best practices for the management and tracking of Scrum projects across multiple development and quality assurance environments.

Project worklist

A list of open assignments for a user, including user stories, tasks, bugs, and issues.

Project

An entity that bundles functionality when you develop solutions with Pega Robot Studio. You can integrate applications, monitor events, and automate tasks. Adapters, automations, and global containers are stored as .os and .xml files in the solution and project folders.

Property Optimizer

A tool that you can use to optimize, or expose, a single-value property so that the property values are stored as a column in a database table, in addition to the Storage Stream BLOB. Optimizing a property improves the efficiency of data retrieval for reporting. The Property Optimizer tool creates an exposed column or a declarative index, changes the database schema, and populates the new column or table with values for existing class instances.

Property message

A text clipboard value that is generated by the system and associated with a property. A property message can convey error conditions, progress, or exceptions to a user.

Property mode

A setting that defines whether a piece of data in your application stores a single value, such as a name, or a collection of related values, such as a mailing address that includes a street, a city, and a postal code. By using the property mode, you organize information in your application efficiently. For example, you can organize shipping addresses of your customers into an ordered list, and then reference an address that is relevant to your business process. You also save time and maintain consistency because you do not need to reference single elements such as a street and a postal code separately.

Property qualifier

A reference in a property that determines the appearance and allowable values of a portion of the property value. A property qualifier rule is an instance of the Rule-Obj-Property-Qualifier rule type.

Property reference

A notation for a run-time reference to the name or value of a property that you can use in activities, data transforms, HTML, and other places. This notation is also called dot notation.

Property type

A setting that defines schema of data in your application. For example, if you create a date type field in which a user provides the date of birth, you ensure that date is the only format the user can enter. A property type determines how data can be processed in your application, integrated with external resources, for example by using REST APIs, and stored in a database.

Property

Properties model data in your business processes and define what information you need to provide to reach your business goal. For example, in a process of hiring new employees, you can create properties that correspond with a candidate's personal details, such as a name, a surname, and an address. Then, when you review applications from different candidates, you provide values specific to each candidate. Properties help you collect and provide consistent data irrespective of the method in which users interact with your application. By referencing properties, you ensure a user receives the same information through a website, an email, or a mobile app.

Proposition

An offer of a tangible product (a handset or a subscription) or less tangible goods (benefits, compensations, or services).

PublicAPI

The supported public interface to the rules engine. As such, PublicAPI is sometimes referred to as the Engine API.

Public-Overridable

Property of a Rule, one of the options of Reusability. A Public-Overridable Rule can be used in different applications and its behavior can be customized based on needs.

Public - Reusable

Property of a rule, one of the options of Reusability. A Public - Reusable Rule can be used in different applications, but its behavior stays the same as in the original application.

Pulse

An instant messaging collaboration tool available in Agile Studio, Service Management, and other Pega apps. When you embed Pulse in your application, users in the same Work Group can create posts with instant messages, files, and URLs.

Pyramid chart

A chart that displays the hierarchical structure and quantity of data in each segment of the pyramid. The height of each segment, and not its width, is significant. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Q

Question page

A survey page that organizes questions into logical groups. By putting related questions on the same page, you can help users complete surveys more quickly.

Queue Manager

The internal server facility that supports queued items created by the Queue-for-Agent method. Agents with a Queue Method value of Standard (on the Schedule tab of the agents rule form) use the Queue Manager.

Quick Create

An option for certain rule types that you can use to configure rules directly in the Create dialog without having to open the rule form. Rule types with this option include properties, field values, when conditions, flows, and activities.

R

RUTA

An entity type that looks for patterns such as Social Security number, account number, and so on. RUTA entities work like regular expressions. Pega Platform provides several examples.

Readiness assessment

An activity that ensures that the various prerequisite processes are in place to create a successful project environment. Readiness assessment is held during the Discover phase.

Record editor

A tool for adding, editing, and deleting data type records. You can access the record editor on the Records tab of a data type in the Data Designer.

Record

A collective term that describes a rule instance or a data instance. For example, a customer record would include data specific to a given customer, such as name, telephone number, and customer account number.

Refactoring

The process of changing the Applies To key part of a rule, the ruleset name and version, or both.

Reference property

A property of mode Single Value, Value List, Value Group, Page, Page List, or Page Group, that can operate to maintain what appears as an automatic copy of properties on another page. Reference properties can eliminate the need for copying the contents of one value or page into one or more other values or pages.

Referencing Rules tool

A tool that displays where a rule is referenced, for the purpose of learning about and debugging applications. For several rule types, the Referencing Rules tool provides two lists:- The left column lists other rules that reference the current rule.- The right column lists rules that the current rule references.

Regular user

A classification of usage for an operator ID instance for a time period by the License Compliance facility. An operator ID can count as a regular user during one time period, but not count as a regular user in other periods.

Remote Case Type

With remote Case Types, users can process work from one application within another application, without changing the context and logging in to many different products.

For example, a customer service representative (CSR) who processes loan requests and mortgage requests can process work by using only one application, even if mortgage and loan requests come from two different applications. To provide this option for a CSR, in a Loan operations application, you create a Loan request Case Type, and then associate the Case Type with the Mortgage operations remote application. As a result, the CSR can create and process loan request Cases from the Mortgage operations application.

Remote logging

A feature that streams the contents of a log file to your workstation. While running a service, you can watch the log for an entire node, or use filters to view the log for a listener or service requestor, rather than opening the log file repeatedly.

Remote system

Any system in a Federated Case Management (FCM) network that provides Cases and work for other systems in the federation.

Report Browser

A tool that provides access to all the reports that are available to you. In the Report Browser, you can complete many tasks, such as browsing and searching for existing reports, running and scheduling reports, creating and modifying reports, and sharing reports with colleagues. The Report Browser is available in the Case Manager portal.

Report Editor

A tool that displays a report and provides options for editing it.

Report List

A tool that provides access to all the reports that are available to you. In the Report List, you can click the report shortcut to run a report and view the report category.

Report Viewer

A tool that displays the results of a report and provides options for analyzing the results. Options for working with the results might include formatting, filtering, saving, printing, and exporting the report.

Report category

A way for you organize reports in the Report Browser. Application developers create public report categories, and managers can create private report categories for their own use.

Report definition

A Rule that defines a report definition report. This rule generates an SQL query that retrieves and sorts information from the PegaRULES database, an external database, or an Elasticsearch index, and displays the results in a variety of formats. The two types of report definition reports are summarized reports and list reports.

Report shortcut

A named link in the Report Browser that provides an efficient way to retrieve and run reports. You can use report shortcuts to organize reports into one or more categories.

Reporting

A Pega Platform feature for retrieving, analyzing, and using data from business processes. For example, you can create a report with the number of resolved Cases per user, and then use the report to assess user performance. You can also sort and filter data to make your report readable and organized.

Reports Database

A mirrored replica of all or part of the PegaRULES database. To reduce the performance impact of report generation, you can specify that some or all reports obtain data from the reports database.

Reusability

Editable metadata, property of the Rule, deciding if a rule can be used in another applications and if its behavior can also be changed. Reusability can be set to Private, Public - Reusable and Public - Overridable.

Requestor ID

A system-generated hash identifier that uniquely identifies a requestor session. A requestor ID is sometimes called the connection ID.

Requestor Page

A named, top-level clipboard page that contains information about your access roles, RuleSet list, and HTTP protocol parameters.

Requestor Scheme

The pxReqScheme property on the requestor page. The requestor scheme indicates the protocol used by the browser that connects to Pega Platform.

Requestor Type

Data instances that define the types of requestors that can access Pega Platform, such as a browser session, an external application, or an internal background process.

Requestor

The process and data associated with a Pega Platform user (guest or authenticated). A requestor is also the processing and data associated with a request to your system started by an outside system, such as a web application server or an Active Server Page on a web site.

Required Field

An input field on a form that must have a non-blank value to be valid. Many flow action forms mark a required field with an orange asterisk. (The asterisk is only a label to notify users that the field is required, and does not affect input editing or processing.)

Requirement

Used to generate legacy document types. A requirement is an event, condition, or function that must be satisfied and tracked by an application. Requirements can be functional (a capability) or non-functional (a quality or constraint). One or more requirements can be used to define the criteria for the successful implementation of a specification.

Resolution Stage

The Resolution Stage in your Case Type defines Case behavior after reaching the end of the Case Lifecycle. When you configure the Resolution Stage, you define a final Case Status as well as whether any child Cases also reach resolution at the same time. A Case Type can have more than one Resolution Stage if you define an alternate path for your business process. For example, in a Case Type for reviewing applications from job candidates, if a Case reaches resolution through the Primary Stages, the resolution status changes to Resolved-Completed. If the Case ends on an alternate path, the resolution status changes to Resolved-Rejected. Use Case Statuses to clearly communicate Case outcomes.

Public - Reusable

Property of a rule, one of the options of Reusability. A Public - Reusable Rule can be used in different applications, but its behavior stays the same as in the original application.

Responsive Behavior

Enables a layout to adjust itself according to screen size, providing an optimal user experience on a desktop, tablet, and phone.

Restore Point

Create restore points to save the state of your system, including rules and data, at a significant point in time, such as before a system update. You can then perform a system rollback to a restore point to return the system to an earlier state.

Results Page

A clipboard page that stores the results of running the Obj-List-View, Obj-Browse, and RDB-List methods. The Obj-Filter method operates on results pages.

Public-Overridable

Property of a Rule, one of the options of Reusability. A Public-Overridable Rule can be used in different applications and its behavior can be customized based on needs.

Robotic Processing

The use of software robots, or "bots", to perform repetitive tasks for you. Depending on your needs, these robots can either operate with (attended) or without (unattended) human interaction. For example, for handling customer calls, you could create an attended robot that prompts the employee to enter the customer’s account number and then retrieves all pertinent information about the client, including information from multiple software applications. If the employee changes any of the customer's information during the call, the robot could then automatically apply those changes everywhere.You can also create unattended robots that process transactions from a queue during non-work hours.In addition to performing tasks much quicker, the use of robots to perform everyday tasks minimizes the chance of mistakes by ensuring that tasks are completed in a standardized manner. Robots can perform the mundane and repetitive tasks for you, so that you can concentrate on more important issues.

Roles

Applications have users, though not all users perform the same tasks. Roles define how users interact with the application by, for example, determining the user interface, page permissions, and routing that are available to a user. For example, in Pega Workforce Intelligence there are several user roles, including administrator, analyst, and report user.

Rollback

Perform a system rollback to revert any recent changes.

Route to Live (RTL)

An industry-standard DevOps pipeline that enables continuous evolution of applications across multiple environments during various stages of development. An RTL includes at least a development, staging, and production environment to help teams build and test changes before deploying them to production. RTL helps you to deliver work rapidly, iterate code more frequently, and verify that the choices you make meet business needs and deliver high-quality results.

Router Activity

Used to evaluate assignment criteria, such as required skill sets and user availability, to determine whether an assignment moves to a worklist or work queue for processing. Router activities have the Usage field set to Route on the Activity form, and return a result by assigning a value to the AssignTo output parameter.

Routing

The process of assigning tasks in a business process to an individual or group of individuals who are the most capable of completing those tasks.

For example, when creating an expense report, an employee creates the report, a manager approves it, and a payroll employee then sends the payment. To process employee compensation payments, you can route the task to the work queue of the payroll team, in which any member of that team can access, select, and process the work item.

If you need a specific person to work on the assignment, you can route the assignment to a work list. For example, when a human resource manager needs to approve employee time off requests, you can route the assignment to the worklist of the human resources manager.

If you need a person with a particular skill set to work on the assignment, you can route the assignment using business logic to a skilled group by defining a specific condition. For example, in an automobile quote request, a prospective customer fills in a form and selects an Electric vehicle check box. The request is then routed to the electric car insurance underwriters work queue, members of which specialize in electric cars.

Rule Assembly

A technique for improving performance by only generating and compiling the Java code that corresponds to a rule when needed.

Rule Cache

An in-memory cache of recently found rules that is used to improve the performance of the Pega Platform engine, especially during rule resolution searches.

Rule Form

Displays the fields and values that comprise a rule or data instance in your application. Rule form types include form-based, harness-based, and custom.

Rule Resolution

The search algorithm used by Pega Platform to find the most appropriate rule instance to apply in a situation. Rule resolution applies to most, but not all classes derived from the Rule- base class.

Rule Type

The general classification or particular use of a Rule. Rule Types help categorize key concepts and behavior, saving you time during the development cycle. Examples of Rule Types include Property, Section, Flow, and Decision. Rules of different types are linked together to define your application. You can view and edit Rules on Rule forms, which display the fields and values that comprise a Rule or data instance in your application.

Rule

A rule is the basic building block of an application that specifies the behavior of part of an application. Rules define the display of a form, the fields that are used in your application, and the flows that define the process for work to get completed. The system can reuse rules throughout your application. For example, in an application used to order replacements parts, you can define a user interface to capture an address, and reuse the rule for UI to capture the mailing address and billing address for the order. Rules provide flexibility during the development process and help you design applications more efficiently so that they can be implemented again in future projects.

Rule-Base Class

An abstract class that contains all rule classes. Rules are the basic building blocks of an application and define its behavior.

Ruleset List

An internal data structure that the system uses to determine which rule instances a requestor can run. When you log in, the system assembles this list from several sources. The list influences a phase of rule resolution processing.

Ruleset Lock

Secures rulesets and ruleset versions to prevent them from being changed. A ruleset is a set of rules that define an application or a major portion of an application, and the way you use rulesets in your application has important design and deployment consequences. Securing rulesets helps maintain data integrity and compliance. By using a ruleset lock, you can prevent potential conflicts when two or more users attempt to change one rule at the same time. For example, you can control who can change rules in a ruleset.

Ruleset Resolution

The search algorithm used by Pega Platform to find the most appropriate use to apply in a situation. For example, in version 2 of a hiring process application, the system uses rule resolution to assemble the rules that are needed to run the application.

Rule resolution ensures that the system uses the latest version of each rule to run an application, because some rules will be found in the original version and some rules may be found in a subsequent version.

There are several factors that are considered when the system is trying to find the right rule, including (among others), the ruleset order, ruleset version, and the context class of the rule.

For example, an application used for hiring new employees includes two rulesets, MyJobApp and MyHR, in that order. The system gives priority to rules located in MyJobApp over the rules located in MyHR, because MyJobApp appears first and MyHR appears second in the list.

To facilitate application evolution, testing, and patching, rules can have multiple versions with the use of rule resolution. In addition, rule resolution provides flexibility as rules defined at a higher level can be overwritten by more specific rules at a lower level of an application.

A class contains rules which define the behavior of your application.

Ruleset Version

The ruleset version characterizes the evolution and development of a rule instance, and the application it belongs with. The version number, in the format NN-NN-NN, defines the major version (first two digits), minor version (middle digits), and patch version (last digits). Rules in versions below the major version are not visible to rule resolution.

Ruleset

A versioned library of Rules, the basic building blocks of applications built with Pega Platform, that describe key components and how a part of an application works. Rulesets help you store, categorize, and version the Rules in an application.

Runtime user

A named Workforce Intelligence Desktop Runtime Runtime user whose desktop usage is being actively captured.

Runtime-only users

Users who only use Pega Robot Runtime, and do not use other Pega Robotic Automation products, such as Pega Robot Studio or Pega Workforce Intelligence.

RuntimeConfig.xml

Contains the configuration settings that are primarily used by Pega Robot Runtime. Pega Robot Runtime is installed as a stand-alone application and is also installed with a Pega Robot Studio installation.

S

SQL function alias

A rule that helps to simplify the creation of complex SQL queries. You can reference an SQL function alias rule in a report definition rule, to define SQL expressions for querying a database for reporting purposes.

Sample Application

The PegaSample sample application lets you view and study basic elements without creating new rules. This sample application is built completely from standard rules in Pega Platform.

Scheduled Task

A Case that is automatically created to support running reports on a scheduled basis. Scheduled tasks belong to the Pega-ScheduledTask class, and have the work ID prefix px-ST.

Screen Analysis page

A page in Workforce Intelligence that shows how much time has been spent in each application screen or on each webpage. The information presented on the screen analysis page can help you determine which processes to automate, in order to improve the overall efficiency of your organization. This information is typically used by business or data analysts.

Screen Flow

A type of Process that is typically used to present a series of Assignments to a single user and allow the user to go back and change or review the input on each screen.

In Pega Express, the equivalent of a Screen Flow is a Multi-step Form.

Screen Layout

Screen layouts help you determine the overall presentation of your portal. While harnesses function as containers for various sections in your portal, screen layouts define the general appearance of the portal. For example, you can insert a screen layout that defines the width, alignment, and background of your screen into your portal harness. Screen layouts support responsive display and can be configured to automatically adjust your interface to scale its width and height to various screens, for example, on a mobile device. Screen layouts also include Accessible Rich Internet

Applications (ARIA) roles by default, which help assistive technology users to navigate the main areas of the application, such as the primary menu and the search.

Section

The building blocks of your user interface, sections can use design templates for their structure and contain such interactive UI elements as fields, buttons, lists, and so on. A section creates a functional chunk of a user interface, and can be reused throughout your application for improved consistency and efficient development. For example, your application may need to display user data as a list of ID cards. You can create a section for the contents of a card, and then reuse that section so that the design of every card is consistent.

Security Auditing

An optional feature that you can use to add information to the default details captured in the History Details of a data instance or rule.

Security Role

A user access role that is used on application servers to control access to servlets.

Security Testing/Penetration Testing

Security testing (also known as penetration testing) is performed to ensure that a system is safe and cannot be compromised by hackers. Security testing is typically performed by either the client team or a specialist third party company at the end of an engagement, shortly before go-live.

Sentiment

In text analytics, sentiment is the overall emotion of a customer message or piece of text, for example, positive or negative.

Service Activity

An activity that is referenced by a service rule. At run time, the activity operates as a BATCH requestor type to perform background processing, and returns the results to the client or calling external system.

Service Blueprint

A method of visualizing a customer's end-to-end journey and the operations on the business side that are necessary to service that experience.

Service Invocation

A call from an external system to run a Rule-Service- rule in your application that creates, updates, or operates on a work item.

Service Level

Indicates how quickly service is initiated. For example, how quickly a phone call or chat request is answered, an email is reviewed, etc. If a contact center answers 78% of all calls within 30 seconds, the service level achieved is said to be 78/30. You can apply a service-level agreement to Cases, stages, steps, flows, and assignments.

Service Package

A name that groups one or more service rules that are designed to be developed, tested, and deployed together. For some service rule types, a service package corresponds to a package of Java classes. Service packages are instances of the Data-Admin-ServicePackage class, and comprise the first key part of most service rules.

Service

A program component that defines and implements an interface between an external application acting as a client, and a Pega Platform system acting as a server. An external system can send a request to a Pega Platform application and receive a response. For example, the Pega Cloud Services SFTP service provides Pega Cloud clients with simple, secure file transfers to and from their Pega Cloud applications.

Service-Level Agreement

A commitment that you make to customers and stakeholders that defines the timeline for delivering your work. You can set goals and deadlines on Steps, Processes, Stages, and entire Cases to enforce the timely completion of work. Goals indicate the suggested time required to resolve a work item. Deadlines state the ultimate time in which to resolve the work item.

ServiceExport Directory

The ServiceExport directory (StaticContent/global/ServiceExport), is a subdirectory of the temporary files directory on a server. The ServiceExport directory path cannot be changed, but the entire temporary directory can be changed.

Shape

An element in a Process that represents a task that a user or application completes as part of a business process.

Shapes are added and configured in . By using Process Modeler to connect and configure shapes in your Process diagram, you can refine the sequence of events that a Case follows at run time.

In the background, a shape is the same entity as a Step, which you add through Case Lifecycle Designer, and both options have the same run-time effect. However, by adding certain shapes through a Process diagram, you have more configuration options than in a Step.

Shared Ruleset

A ruleset that contains a small number of rules that each operate on a common, top-level page of a single class (or of subclasses of that class).

Show and Tell

A show-and-tell session is an opportunity for a team to share their progress with stakeholders and get immediate feedback for action. Show-and-tells are done throughout a sprint, as well as at the end of a sprint to show all the work completed according to the Definition of Done.

Sibling Rule

An instance of another rule that has the same visible key. Two rule instances are siblings if they are both visible to you and have a common value for the pxInsName property.

Simple Question

In a survey, a simple question collects information from users in a single-answer format. For example, you can ask users to enter a mobile phone number in a text box, or select a type of insurance plan from a list.

Single-value property

Also known as a scalar property, a Single Value Property contains a single text string. Text, numbers, dates, Boolean values, and amounts are stored in single value properties.

Skill

Skill rules are instances of the Rule-Admin-Skill rule type. A skill rule gives a name and a range of proficiency value to different user skills. These skills can then be associated with users (in the Operator ID instance), and can form the basis of skill-based routing decisions.

Skimming

The process of saving the highest version of a rule into a new, higher ruleset version. Skimming applies mainly to rule-resolved rules. The two types of skims are minor and major. During a minor skim, rules are stored in a higher minor version, and during a major skim, rules are stored in a higher major version.

Skin

Skins determine the general visual style of your interface and let you define the typography, placement, and appearance of UI elements in a traditional UI. The skin separates content from presentation, so that you can reuse your configurations and keep a consistent UI design. For example, you can reuse a section anywhere in your application and retain a uniform style that is specific to your company.

SmartInfo

A feature that displays a pop-up window when you hover over specific elements in a report or form. The content of the pop-up display is determined by a section rule, and are displayed in read-only mode.

SmartLayout

A formatting option for a UI section, in which the layout is presented as a grid of paired cells that has columns of uniform width, style, and characteristics. Each pair of cells holds one label and one property value or other form control. Use dynamic layouts instead of SmartLayouts to separate content from presentation.

SmartPrompt

A SmartPrompt field on a form supports user selection of a text value from a list of candidate values. When you enter characters in this field, the first value that matches your input is selected.

Smoke Test

Simple tests that quickly cover a broad range of functionality to ensure that a newly deployed release works correctly. These should be performed in every environment on receipt of a new deployment.

Solution

Within Pega Robot Studio, solutions and projects are containers for all the items required to build and run a project. Solutions can include multiple projects. Once you deploy a solution to the Pega Robotic Automation Deployment Portal, it is known as a package.

Spark Chart

A microchart that displays graphical information, such as lines and columns, in a compressed format. Because spark charts are small, you can embed them in a form or layout to show a lot of information in a single view. You can specify the chart type and subtype for a report definition report by using the Chart Editor.

Specification

Represents a unit of processing that is performed by one or more actors for a given Case Type within an application. In other words, a specification defines what an application does. One or more requirements define the criteria for the successful implementation of a specification. Specifications are also used to generate legacy document types.

Spin-off Flow

A process that runs in parallel with the calling process, or parent flow. Spin-off flows can work on the same Case as the parent flow, or they can work on a different Case, based on the context that you provide.

Split schema

A database configuration in which rules are kept in a separate schema from work and data.

Sprint Planning

The time-boxed activity at the beginning of each sprint that identifies what will be delivered in the Increment resulting from that sprint, and how the work needed to deliver that Increment will be achieved.

Sprint Retrospective

A meeting held at the end of each sprint in which the whole sprint team meets to transparently discuss what went well, what can be improved and what they would like to repeat. The actions are owned by the team and reflected in the next sprint.

Sprint Review

A meeting held at the end of each Sprint in which the Scrum Team and stakeholders discuss what was achieved in the Sprint. Based on the Sprint Review and any changes that were made to the Product Backlog during the Sprint, attendees together work out their next objectives.

Staff Availability

A function that helps you manage the planned absences of your workers. For example, when a member of your team goes on vacation, you can route their assignments to a substitute user or team until they return to work.

Stage

Stages define the top level organization of tasks that your business processes require to reach resolution. Stages represent milestones in your Cases, such as finalizing a phase in a business process. For example, in a Process for reviewing job applications, one Stage visualizes actions in conducting a job interview and evaluating the documents that a job candidate provides. Another Stage might consolidate tasks for making a decision about accepting or rejecting a candidate. Use nouns and noun phrases for Stage names.

Standard Rule

The rules provided with Pega Platform. You can use standard rules as-is, or you can copy them into your application and modify them.

Starter Flow

A flow that supports the creation of a Case. Also known as a starting process.

Static Assembler

A utility for preassembling and caching the rules of an application.

Static Content

Information that is extracted once from a rule to an HTTP server or web server and is unaffected by user input, such as the use of an application or the contents of user clipboards.

Step Page

A reference to a clipboard page that is available to an activity, or to a new page that is created by a Step. Each Step in an activity could have a designated Step Page. The Step Page becomes the primary page for the duration of the Step's execution.

Step

A Step in your Case Lifecycle represents a single task in your business process. A Step can be a user action, such as collecting information from a customer, or an automation that an application performs, for example, sending an email to a customer when a business process reaches resolution.

When you visualize your work, you order Case Lifecycle Steps in a sequence that communicates what actions are required to reach your business objective. You can select from a wide choice of Steps to ensure that you reach your goals in the most efficient way.

Steps are added and configured in Case Lifecycle Designer.

> **NOTE:** Steps are the actionable elements that drive the work forward in a Process and represent the individual tasks that need to be completed. Shapes aIntegrator shapere used for visual modeling and represent the structure and flow of the Process, including how Steps are connected and the decision points in the Process.

Storage Stream

A column in a PegaRULES database table that contains property data in a compressed format. Most tables in the database contain a Storage Stream column, identified as the pzPVStream column.

Straight-through processing

Automatic processing that occurs without operator intervention. Straight-through processing is implemented by using a flow rule that does not contain any assignments.

Strategy Result class

Defines the results that a decision strategy produces. The Strategy Result (SR) class is a subclass of the standard Data-pxStrategyResult class (either through pattern or direct inheritance). The Data-pxStrategyResult class contains a set of predefined properties (for example, pyIssue, pyGroup). The SR class can be extended with application-specific properties.

Stream Processing

The run-time conversion of an HTML or XML text block containing JavaServer Page (JSP) tags or HTML directives into a final form that does not contain JSP tags or directives. JSP tags and directives are evaluated as they are encountered from the start of the string, in the context of the current clipboard.

StudioConfig.xml

The StudioConfig.xml file contains the configuration settings used by Pega Robot Manager.

Subprocess

A Subprocess is a Process that is called by another Process. In a Process diagram, Subprocesses are represented by the following shapes: Subprocess, Split Join, and Split For Each.

Subreport

A report that is called by another report to provide data. When you designate a report as a subreport, the original report is not altered, and you can still access it. However, a subreport cannot have its own subreports. You can designate a subreport within a report definition report to simplify the assembly of data from several classes, or to satisfy complex conditions.

Subscription

Subscriptions are a way of notifying developers and users of actions that are related to an application, a report, or an event. Notifications are sent to subscribers by using an RSS feed, an email, or a notice on a dashboard.

Summary View Rule

(Deprecated) Defines a summary view report that displays summary counts, totals, or averages, in which you can drill down to view supporting information. In Pega Platform version 7.2 and later, you create custom summary view reports that you need as report definitions. Internet Explorer 11 is the last version of Internet Explorer that the summary view rule supports.

Summary page

A webpage within Pega Workforce Intelligence that shows the high-level view of utilization and application usage. Users responsible for multiple levels in the organization can drill up or down through the various levels of the hierarchy.

Survey

From Pega Platform version 7.2.2, the previously standalone Pega Survey application has been included in Pega Platform as a standard Ruleset. Four survey APIs can be used to programmatically ask survey questions or retrieve survey results.

Suspended Case

An open Case for which work is halted because an unusual or suspect value is detected. All of the flow executions in process for the suspended Case are stopped, and the value for the property Work-.pxSuspended changes to true.

Swimlane

A shape in a flow diagram that is used to organize and graphically identify related groups of shapes that are performed within specific work contexts, typically teams.

Symbolic Date

A system-derived date value that is used in the selection criteria of reports to choose values related to the current date. You can use symbolic dates as values in Date and DateTime properties.

System Architect

The role assigned to a person who designs and builds components of Pega applications. A system architect (SA) is typically a person with some programming skills, but more importantly, is someone who loves to build – to move quickly and not be tied down to building lines of code. SAs also have different levels: Senior, Lead and Principle.

System ID

The system ID (also known as a system name), identifies your Pega Platform system, including all instances (nodes) that share a single database and the same system name. The system ID is stored in a System data instance record (Data-Admin-System class).

System Pulse

The system pulse synchronizes rule changes across nodes on Pega Platform. Two types of pulse processing are available: a database pulse, and a cluster-based pulse.

System of Record

The primary data source for a data object, such as a connector, external database, or local data storage. For example, for an Employee data object, you might connect to a system of record that populates the data object with employee information fields such as Name, Department, and Start Date.

System-Base Class

A standard, top-level abstract class that contains concrete subclasses that hold real-time status information about the server software as it runs.

Skill-Based Routing

Skill-based routing uses skill information, such as skill rules, to define which workers are qualified to carry out a given assignment. For example, a customer of an insurance company might want to insure a vintage car. To accurately appraise the value of the car, the insurance Case must be handled by an employee with the proper expertise. To this end, you can set up a routing logic that assigns vintage car Cases to users who have 'vintage car appraisal' as a skill. This type of routing helps you distribute work efficiently and improve your organization's productivity.

T

Tag

A text value that Case workers and Case managers can associate with one or more Cases. Users can select from a list of available tags or create new tags. Case managers can then search, access, and report on tagged Cases.

Target

An object created in the adapter control that represents a native control in an application that you are automating. There are many types of targets and each target represents a specific type of control. For example, a GridTarget knows how to get cell values, set cell values, and so on. A ListBoxTarget provides a count of items and returns the items as a list.

Task workflow

Your organization sends start and end times that create task workflows to track specific activities. Workforce Intelligence then matches the timestamps for those tasks with the data that it collects from associate desktops to analyze what occurred during that task.

Team

1) In user portals, a "team" is equivalent to a "work group". 2) One or more associates who work semi-autonomously on recurring tasks or towards a common goal. In a Pega Workforce Intelligence hierarchy, departments are comprised of teams. (Defined by the WFI team)

Temporary Case

A temporary Case is created and resolved by a single operator, or by straight-through processing, and is not saved as a database object. You can use temporary Cases in screen flows and regular flows. To create a temporary Case, select the "Creates temporary object?" check box on the flow that creates the object.

Test ID

A property that supports the automated testing of Pega Platform applications. To generate Test IDs, configure the Test ID field on the General tab of the UI control property panel.

Test Management Framework

The Test Management Framework (TMF) is an optional application that implements best practices for the testing and deployment of new applications and incremental changes to existing applications.

Thread

A PRThread, or thread, is a data structure that allows a requestor to have separate clipboard page name spaces that do not interact with each other.

Threshold

A target range of values. When a threshold is exceeded, an alert is generated. You can manage threshold settings and specify whether alerts display by updating the prconfig.xml file, or by using dynamic system settings.

Throughput

A measure of work accomplished or completed during a calendar interval.

Ticket

A named location that you add to a flow diagram. Tickets identify processing, such as a transaction rollback, that occurs when the normal flow progression of a Case is interrupted.

Time-Qualified Rule

A circumstance that is only resolved during a specified range of time. This type of rule is commonly referred to as a "date range circumstance", or "temporary rule."

Timeline page

A webpage within Pega Workforce Intelligence that provides a supervisor with a daily view of the details and patterns of their associates' utilization and application usage. You can use this page to compare behavior and drive improvements.

Top-Level Case Type

Represents work in your application that can contain other Case Types, known as children or child Case Types. Unlike child Case Types, top-level Case Types are not covered by a parent, and are typically instantiated by Case workers using the Case

Manager portal. Your application can have many top-level Case Types. You can view your top-level Case Types in the Case Type Explorer.

Top-Level Class

A non-standard, abstract subclass of the ultimate base class, @baseclass.

Top-Level Page

A clipboard page that is usually created through the Page-New method. Applications create many top-level pages during the course of their operations, and activities can also create top-level pages. Most top-level pages are named, and have an associated class.

Topic

A way of classifying the intent of a block of text. Used to decide which action to take (creating a Case, sending a reply, or routing to a specific queue). The topic is determined by a keyword match or by using a machine learning model.

Tracer Tool

A tool for debugging flows, data transforms, activities, services, parse rules, and declarative rules. The Tracer tool provides full debugging facilities, including step-by-step execution, breakpoints, and watch variables.

Traditional Portal

Portals that have a fixed layout and are built from HTML rules with Data-Gadget as the Applies To key part. Traditional portals are referred to as "classic" portals in some menus and selection lists. Composite portals are recommended for new application development, as traditional portals are not supported in Pega Platform.

Transfer

The reassignment of a worklist or work queue by a user or manager with appropriate privileges.

Transient property

A property that is not persisted to the database. Transient properties can have non-null values on the clipboard, but when a clipboard page containing transient properties is saved to the PegaRULES database, the values are removed from the Storage Stream column. Similarly, when an instance containing a transient property is retrieved from the database and opened on the clipboard, the transient properties have no initial values on the clipboard.

Transition

A reference to a when condition (Rule-Obj-When rule type), or an expression that evaluates to true or false.

Translator

In Pega Robotic Automation, translators are objects that are injected into the adapter application and operate directly against the native control. Translators are designed to operate against a specific type of control. For example, the .NET DataGrid translator works against System.Windows.Forms.DataGrid, or any objects that inherit from DataGrid.

Tree Layout

Allows you to view the embedded pages of a Page List as a tree. You can click branches to display or hide their leaves. The tree can display embedded relationships as deep as 20 levels. Each branch of the tree corresponds to a single embedded page or property. The tree is created dynamically and can have as many branches as needed to display the requested data.

Trend Report

Displays counts of events, objects, or actors as a series of points along a continuum, typically a timeline. The x-axis of a trend report displays data points that represent weeks, months, or quarters in a year, or some other meaningful increment. One column of the data that supports the trend report displays one or more single value properties of a DateTime type.

Trend

A trend compares desktop usage for a specified part of the hierarchy over a defined time period, such as from this week to last week. Trends are usually calculated by comparing percentages.

Trigger Rule

A trigger rule identifies an activity that runs automatically when an object of a specific class is saved or deleted in the PegaRULES database. This rule is an instance of the Rule-Declare-Trigger rule type.

Trigger

The event or method that starts the processing of a specified action in response to another event or method.

U

UI Connector

A C# class that is created and compiled into your Pega Robot Studio project. UI Connectors contain the logic for mapping a target implementation to a native control. The adapter control communicates with the UI Connector and the UI Connector uses the target to make reflective calls to the native control.

Ultimate base class

The topmost class in the class hierarchy, identified by the symbol @baseclass. All other classes are derived from this class. This class is similar to the root class in Java. The abstract classes Assign-, Rule-, Work-, and others that are direct subclasses of the ultimate base class are known as base classes.

Uncommitted hotfix

A hotfix that is installed in your system and active, but you can still remove it. You can use uncommitted hotfixes to test your system with the changes in place before permanently committing the changes.

Unknown Time category

In Workforce Intelligence, the default work category for all applications and websites until they are mapped to a more specific work category.

Unknown time

In Workforce Intelligence, the amount of time spent in applications or away from the computer that is not categorized as Production Work, Other Work, or Non Work. Unknown time is shown as both an amount and a percentage of total time spent at the computer.

Unoptimized Property

An aggregate property, a property within an embedded page, or a Single Value property that is stored in a specially formatted Storage Stream or BLOB column.

Update Controls

A feature that helps render your application user interface in the HTML5 document type. You can also use this feature to upgrade deprecated controls in a section to improved alternatives.

Urgency

A numeric value that brings visibility to unresolved work in your application. The number can range from 0 to 100 and is displayed in worklists and Case details. The higher the urgency, the more important it is to address the unresolved work, such as an Assignment or a Case.

Usage Daemon

A background Java thread that collects data supporting the analysis of performance statistics. The daemon saves this data in an instance of the Log-Usage class. The usage daemon adds one instance to this class every hour for every requestor, including agents. On a busy system, the associated PegaRULES database table pr_perf_stats can grow to contain thousands of rows.

Usage Report

Contains statistics about the usage and performance of report definition reports in the current application. Several standard usage reports are provided with Pega Platform, or you can create your own usage reports. You can run usage reports from the Report Usage tab of the Reporting Settings landing page.

User Acceptance Testing

User acceptance testing (UAT) is a methodology for testing specific business scenarios to ensure that a system behaves as the business expects.

User Action

A task performed by a worker, such as a customer service representative (CSR), while working in a business process. For example, a user action could be a CSR entering income details in a loan request dispute. Other user actions can include changing the stage of a business process, creating Assignments, and adjusting goals and deadlines. By incorporating user actions into your business processes, you ensure that the work that you create can be manually adjusted to meet dynamically changing circumstances.

User Page

A top-level clipboard page created by an activity. User Pages appears in the User Pages section of the Clipboard tool.

User Reference

A type of field that you configure on a form. At run time, it displays a list of existing users in your application.

User Story

Short, simple descriptions of a feature that are told from the perspective of the customer.

Utilization

In Workforce Intelligence, utilization is the measurement of how much of a user's time is spent in a specific time category, such as Production Work (work that contributes directly to the main business of the team or department).

V

Validate Rule

Validate Rules help you to ensure that users enter valid values in Cases and that the system can process the information correctly. A Validate Rule tests input values against conditions that you define as part of the Rule. If a value that a user enters does not meet the conditions, the system displays an error message when the user submits the form.

For example, you can ensure that customers provide their name and address before placing an order, or that the date of birth they provide is not in the future.

> **NOTE:** The Validate Rules are also referred to as Validations.

Validation

A Validate Rule evaluates a set of conditions against an object, such as a Case or Data Object instance. If the object values fulfill the specified conditions, the system adds an error message to the Primary Page, which is displayed.

For example, you can ensure that customers provide their name and address before placing an order, or that the date of birth they provide is not in the future.

> **NOTE:** Validations are also referred to as Validate Rules.

Value Group Property

A Value Group property is a container for an unordered list of values of different types, and can contain an unlimited number of values.

Value Group

An unordered collection of related text values. A value group can be used by more than one property in an application.

Value List Property

A Value List property is a container for an ordered list of text values, and can contain an unlimited number of values.

Value list

An ordered collection of related text values, such as department names, countries, or telephone number types. A value list improves the accuracy of data entry by limiting the value in a field to a set of predefined words or phrases. A value list can be used by more than one property in an application.

Verbalization

A structured, English-language text description of an activity. The system can generate a verbalization file (in HTML format) for any activity. Verbalization files are a useful form of documentation for activities.

Verification

An independent review in a workflow by one person of some part of another person's work (and of the system's work), before that work becomes final. Verification is common in financial workflows involving large dollar amounts or sensitive legal commitments.

View

A View is a reusable configuration of UI elements that you can use to build a modular, consistent, and intuitive work space with less effort. When users work on a Case, they interact with Case Views to gain insight into the Case and perform their tasks.

Virtual Rules Table Cache

The Virtual rules table (VTable) cache is the default caching setting for all Pega Platform applications. VTable caching is a higher-performance replacement for Application-Based-Assembly (ABA) caching, and is automatically primed during system startup with rules that have been either statically assembled or built dynamically as they were used in the system.

Visible Key

The visible key of an instance is the text value of a reserved property, @baseclass.pxInsName. This property is defined in the ultimate base class and is available for use in every class. The value of this property is sometimes called the instance name, or informally, "insname."

Vision Alignment meeting/Kick-off meeting

In the Pega Express methodology, a Vision Alignment meeting brings together all of a project's team members and orients them to the objectives, plan, and work methodologies of the project. This meeting should happen at the start of the Prepare phase of a project taking the Pega Express approach.

Voice Response Unit (VRU)

An older term for an interactive voice response (IVR) system.

W

Wait time

In Workforce Intelligence, the period of time that a user waits for an application to become usable or for a browser to load a website or web application.

Waste

In Workforce Intelligence, time recorded as Non Work, Unknown, Wait Time, and Idle is categorized as Waste.

Web Node

A server that hosts the Pega Platform part of a composite application. A web node has "web" as the value of the nodetype entry in the prconfig.xml file, or in dynamic system settings.

Web domain

The portion of a website’s URL that allows for application identification for many business applications.

When Rule

A When Condition Rule defines a true-false test based on the results of an Expression or the results of another Rule. For example, comparison of one or more property values with constant values, or with other property values.

Widget

A GUI element in your portal that displays operational information about your application, for example, key performance indicators. By personalizing a portal dashboard with widgets that are relevant to a role, you can increase the dashboard's usability and the user's productivity. For example, you can design a workspace that includes a widget for frequently used reports, to help managers save time and effectively oversee their projects.

Work Focus categories

In Workforce Intelligence, desktop usage and captured off-computer time can be classified into different work focus categories, to give insight into how much time is spent on different types of work. The following work categories can be used:

- Production
- Other Work
- Non Work
- Idle
- Unknown
- Waste

Work Group

A Work Group consists of one or more supervisors and one or more workers who report to that supervisor. Work Groups are instances of the *Data-Admin-WorkGroup* class.

When you create an application, the system creates a default Work Queue and Work Group. Because of mutual dependencies, you need to provide a Work Queue when you create a Work Group, and when you create a Work Group, you need to provide a Work Queue.

Work Party

A person, business, or organization that is involved in a Case. A work party receives correspondence, such as email, and can be an active or passive participant based on its role.

Work Pool Name

The name given in the Short Description field of a class group (also known as a container class), which is a collection of work types.

Work Pool

A class group that consists of a set of work items or Cases that a user is allowed to access and work on within an application. The parent Work- and Work-Cover- classes for these work items and Cases are specified in the user's access group.

Work Queue

A list of open Assignments for a group of users. Assignments stay in the Work Queue until a user assigned to the Work Queue selects an Assignment, or a manager sends an Assignment in the Work Queue to a specific user. By associating many users with a single Work Queue, you can ensure that even if individual workers are busy with other tasks, the work is processed efficiently.

Work Type

A concrete class derived from the Work- base class. Work types derived from the Work-Cover- base class are referred to as Case Types.

Work- Case class

A superclass to all of the classes that define work items. A work item is the fundamental unit that records processed work in an application.

Workbasket

This is a deprecated term for what is now known as the Work Queue.

Workflow dashboard

A dashboard in Workforce Intelligence that includes scores, insights, and a chart of workflows. You can interact with data on the dashboard to access more detailed information, select metrics to update the workflow chart, or open a table summary showing, for example, workflows filtered by a specific insight.

Worklist

A Worklist is a list of all open Assignments for a specific user. For example, the system routes Assignments that require a human resources manager to approve employee time off requests to the Worklist of a human resources manager.

Workspace

A Workspace is an operator-specific tool that keeps Rule modifications in your application private until you share your changes to a team Branch. Work that you perform in a Workspace is unavailable to other operators in your application and does not affect the work of other developers.