Pega Government Platform '23

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Get started with Pega Government Platform

Explore the links below to access product documentation and other useful information for Pega Government Platform (PGP)

Overview

- Product overview
- Release notes

Setup

- Install
- Update
- Implement

Use

- Hotfixes

Release notes

Pega Government Platform (PGP) release '23 provides an array of new capabilities and enhancements that caters to accelerate the development of Government business processes providing business components and reusable assets in the areas of configuration and management of all types of programs including grants, benefits programs, regulatory programs like certificates, permits & licensing in addition to investigative case management, acquisition modernization, and so on.

New features for this release comprise of new program definition, program finder, enhancements for time management components, activity plan, and application request management.

Pega Government Platform '23 brings in enhanced accessibility and user experience based Pega Platform '23 offerings.

For more information and a list of additional documents available for this release, see the Pega Government Platform product page.

For a complete list of new features, see the Release Notes.

- **Pega Government Platform '23 new features**
- **Pega Government Platform '23 enhancements**
- **Other enhancements**
- **Issues addressed in this version**
- **Known issues in this version**
- **Rule changes in Pega Government Platform '23**
- **Deprecated and withdrawn rules**

Pega Government Platform '23 new features

The Pega Government Platform release '23 includes a number of new features.

- **Program definition**
- **Program finder**

Program definition

Program definition case type in Pega Government Platform (PGP) helps business users define policies, and intake and review nuances of programs in a standard and unified process. In addition to the configuration capabilities, this feature allows business users to create and edit a program throughout its lifecycle. These business users have appropriate audit trails and deeper business dynamics to support all entity (person, business, facility, vehicle, and items) based programs.

Related concepts

- Program definition

Program finder

In Pega Government Platform, Program finder allows citizens to find programs that may be of interest to them based on a flexible questionnaire that can be managed by the business. This prescreening helps users identify eligible programs and a mechanism to apply for the programs.

Related information

- Program finder

Pega Government Platform '23 enhancements

The Pega Government Platform release '23 includes a number of product enhancements.

Activity plan

Activity plan feature is enhanced in release '23 to support sequencing of activity plan, goals and tasks, and greatly improves the operational efficiency of the business. This feature will be an add-on to the current parallel processing and caters to both definitions of the sequence, by the business, and execution of the tasks and goals in the activity plan. This feature helps in sequencing the goals and tasks of an activity plan by providing the order or sequence.

The following enhancements have been made to activity plan in this release:

- The feature can be used by the business by selecting the sequential checkbox while creating an activity plan template or initiating the activity plan case at runtime. Once the sequence is set, the goals and tasks within the plan will be created in that order. The next task or goal will be assigned only after the previous one is resolved. Users can also assign goals and tasks to work queues in a runtime activity plan case.
- If users need to provide additional information or details, they can reopen a closed task using the Reopen feature in Task case. Once the task is reopened, the respective parent cases (such as goal and activity plan cases) will also be reopened if they are already resolved.
- The SLA feature in the activity plan, goal, and task has been enhanced to support weeks and months. Users can also provide SLA as a custom date in the plan, goal, and task instead of units.

- After creating and assigning a case, users can edit the descriptions of an activity plan, goal, and task.

- A new report named Activity plan, Goal, and Task details has been introduced to display the list of plans, goals, and tasks created.

Enhanced time management process

Pega Government Platform (PGP) introduces additional flexibility in the time management feature to support cascading approval for time entries. Different agencies will have their own need of approvals, with this feature, each time entry can go through various levels of approvals such as to Work group manager, Time code manager, and Project owner based on the configuration in each project by the business. Additionally, a new configuration is introduced to enable or disable the deadline validations.

Application request

In Application request case type, from Pega Government Platform (PGP) '23, users can view the details of the program selected in Program details screen before proceeding with the flow and this allows the users to make a choice of selection before proceeding with the complete application. Additionally, we have introduced a dynamic Project details screen capture in Application request case type and the details of the project will be asked to the applying user, if the selected program is configured to capture the project details. This would be a standard pattern that can be extended for many more specialized data captures for programs, during the application process.

Verify document

When configuring Verify document component in any case type with Pega Government Platform (PGP) '23, business users can opt to allow reject or approve specific documents. This option will enable the reviewers of the case to approve or reject each document from the list of documents and provide their comments. This feature also enables the business users to configure the change of stage on rejection and handle the complete flow seamless between applicants and case reviewers.

Other enhancements

The Pega Government Platform release '23 includes minor enhancements that improve accessibility and ease-of-use.

Confirmed localization readiness

All the new features and enhancements are verified for localization readiness.

Accessibility enhancements

Web Accessibility continues to be an important compliance aspect for Pega Government Platform (PGP). We continue to enhance our product supporting accessibility needs. Here is the list of accessibility enhancements carried in current release.

Expected behaviour	User experience	Example
Keyboard focus: Keyboard focus should remain within modal dialogs.	keyboard-only users or screen readers should be able to access content within a modal dialog that is not active with the mouse, but is actionable through keyboard.	When the "View association" dialog appears, the focus remains in modal dialog.
Keyboard focus: All active elements receive keyboard focus or can be activated with keyboard	• All links present in table will receive keyboard focus. • Auto-complete control will receive focus and accessible with keyboard.	• The "Select" control present in "Assigned to" column receives keyboard focus. Similarly, all links will have keyboard focus.

Expected behaviour	User experience	Example
Keyboard order: Reading order of content should be logical	Users will be able to understand the reading order of the content.	In the right navigation tool bar, the interactive controls can be navigated to and/or operated with the keyboard alone. For example, Associations, Branches, Merged to, Duplicate, and so on for entities and cases.

Issues addressed in this version

This section describes issues resolved in this release that are of the most interest to and are likely to have the most impact on the Pega user and developer community.

For each issue, a reference number is provided, and the prefix of the reference number indicates the issue type. You can use the reference number of an issue in your related conversations with Pega Support.

The release notes include the following issue types:

INCs
: Customer-reported incidents. For example, INC-183895.

SRs
: Support requests, which were used instead of incidents in older releases. For example, SR-D79601.

ISSUEs
: Pega-identified issues. They might or might not be related to customer-reported incidents. For example, ISSUE 654263 (which might also be written as just 654263).

SEs

Sustenance engineering activities. For example, SE-60265.

Starting Q2 2021, all customer-reported issues are logged as INCs. You can view INCs that you logged in the My Support Portal. INCs logged by other Pega customers, and all other issue types (SR, ISSUE, and SE), are available in Pega internal tracking systems, in addition to these release notes.

ID	Title and Description
ISSUE 715417	Unable to create Event case from Dashboard page
ISSUE 764497	Edit subject is not working as expected

> **Tip:** You can look up Pega Platform resolved issues in the Pega Platform Resolved Issues.

Known issues in this version

This table describes the known issues that might occur in this release.

> **Note:** To submit new issues or find out more about known issues, or to request a hotfix, go to the Pega Product Support Community. Look up or subscribe to your Support Requests (SRs) in My Support Portal. Ensure that you refer to the issue ID (SR, BUG, or FDBK) in all communications.

ID	Title and description	Suggested resolution
ISSUE 625115	Empty assignment key error on click of edit in investigation case, for user with no edit access rights.	Override corresponding section and have a "WHEN" condition.

ID	Title and description	Suggested resolution
ISSUE 676905	Unable to open the tab review checklist tab in application request unless the case is refreshed.	"Refresh" the case to view the details.
ISSUE 716163	After changing the locale of operator from non-English to English, while using TrackSecurityChanges for data instances for Field audit, values are still localized.	The fix is anticipated in 23.1 from platform.

Rule changes in Pega Government Platform '23

Pega Government Platform has withdrawn a few rules during this release to better maintain the product and make it easier for you to extend the rules when needed.

Other rule changes

Rule type	Rule name	Ruleset	Comments
Text file	Vis JS	PegaPS	Updated js with the latest js from Vis-Network. *Vis.JS* file (deprecated in 8.8) is made available in release '23.
Function	PGPUtilities PartyRoleInPageGroup--(String, String, ClipboardProperty)	PegaPS	Deprecated as this is dead code and not being used in the application.

Deprecated and withdrawn rules

Pega Government Platform has deprecated some rules during the releases to better maintain the product and make it easier for you to extend rules when needed. After two releases these rules will be withdrawn as a practice.

The following table lists the count of deprecated and withdrawn rules for every release in Pega Government Platform.

Release	Deprecated Rules	Withdrawn Rules
'23	70	28
8.8	2	4
8.7	7	67
8.6	4	48
8.5	35	165
8.4	0	31
8.3	13	37
8.2	5	34
8.1	3	2

- **Deprecated rules**
- **Withdrawn rules**

Deprecated rules

This page lists the list of deprecated rules of Pega Government Platform for 8.x releases.

'23 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for '23 release.

Name	RuleSet	Ruleset version	Applies to
AllMembersHaveEndDate	PegaPS	08-23-01	PegaPS-Work
ApplicationPending Email	PGPCosmos	08-23-01	PegaPS-Work
ApplicationSubmitted Email	PGPCosmos	08-23-01	PegaPS-Work
AttachFilesScreenmmobile	PegaPS	08-23-01	Data-WorkAttach-File
AttachFilesScreenMobile	PegaPS	08-23-01	Data-WorkAttach-File
BranchesActions	PGPCosmos	08-23-01	PegaPS-Work-Entity-Business
BusinessNameRequried	PegaPSUserServices	08-23-01	PegaPS-Work-User-Registration
CasesListValues	PegaPS	08-23-01	PegaPS-Work
CheckInvalidMaritalStatus	PegaPS	08-23-01	PegaPS-Data-Entity-Person
CommunicationInfo	PegaPS	08-23-01	PegaPS-Work
CopyCountryIntToData	PegaPS	08-23-01	Code-Pega-List
DocumentGenerationDetails Mail	PGPCosmos	08-23-01	PegaPS-Work

Name	RuleSet	Ruleset version	Applies to
EducationView_Heading	PGPCosmos	08-23-01	PegaPS-Work
EneterValidEmail	PegaPS	08-23-01	@baseclass
ExperienceView_Heading	PGPCosmos	08-23-01	PegaPS-Work
ExternalApprovalEmail	PGPCosmos	08-23-01	PegaPS-Work
FetchEducationDetails	PegaPS	08-23-01	Code-Pega-List
FetchevaluationCriteriaList	PegaPS	08-23-01	PegaPS-Data-Config-EvaluationCriteria
FetchPersonHouseholdList	PegaPS	08-23-01	Code-Pega-List
GovtServiceWrapper	PegaPSPortals	08-23-01	PegaPS-Work
HasNoActiveMembers	PegaPS	08-23-01	PegaPS-Work
HasNoHeadOfHousehold	PegaPS	08-23-01	PegaPS-Data-Entity-Household
IsExperience	PegaPS	08-23-01	PegaPS-Data-Entity-Associate
IsNotAdministrator	PegaPS	08-23-01	PegaPS-Data-Entity-Business
IsResultCountIsZero	PGPCosmos	08-23-01	PegaPS
IsReviewPending	PegaPS	08-23-01	PegaPS-Data-Review

Name	RuleSet	Ruleset version	Applies to
IsWorkPartyURIExists	PegaPS	08-23-01	Data-Party
KnownEvidenceLocation	PegaPSInt	08-23-01	PegaPS-Int-Evidence
LoadSecurityQuestions	PegaPSUserServices	08-23-01	PegaPS-Data-Entity-Person
ManageLocationList	PegaPS	08-23-01	PegaPS-Work
MergeEntitiesHeader	PGPCosmos	08-23-01	PegaPS
MissingAttachment	PegaPS	08-23-01	@baseclass
MissingHeadOfHousehold	PegaPS	08-23-01	@baseclass
NoDataWithAddAssociation	PegaPS	08-23-01	PegaPS-Data-Association
NoIDLocationMapWithList	PGPCosmos	08-23-01	PegaPS-Data-Entity
NoNearbyCasesResults	PegaPS	08-23-01	PegaPS-Work
NoRDLPaginator	PegaPS	08-23-01	PegaPS
NotificationEmailTemplateContent	PGPCosmos	08-23-01	PegaPS-Work-Event-Initiate
ParticipantsListExists	PGPCosmos	08-23-01	PegaPS-Work-Manage-Interview
PostAddTeamMember	PegaPS	08-23-01	PegaPS-Work
PostDocumentParamConfig	PegaPS	08-23-01	PegaPS-Work

Name	RuleSet	Ruleset version	Applies to
PreferenceDetails	PegaPS	08-23-01	PegaPS-Data-Preference-Comm
PreSearchBusiness	PGPCosmos	08-23-01	PegaPS-Data-Association
ProfileNavigation	PegaPS	08-23-01	PegaPS-Data-Entity-Person
RemoveTempAttachmentsPage	PegaPS	08-23-01	PegaPS-Work
ResetAssociate	PegaPS	08-23-01	PegaPS-Data-Association
SalutationAndMaritalStatus	PegaPS	08-23-01	PegaPS-Data-Entity-Person
SaveAssociations	PegaPS	08-23-01	PegaPS-Data-Entity
SelectValidOwner	PegaPS	08-23-01	@baseclass
SetDuplicateFalse	PegaPS	08-23-01	PegaPS-Data-Config-InterviewTemplate
SetEndUserDefaults	PegaPSUserServices	08-23-01	Data-Admin-Operator-ID
SetProcessParameters	PegaPS	08-23-01	PegaPS-Data-Config-Portal
ShowItemValues	PGPCosmos	08-23-01	PegaPS-Data-Entity-Item
ShowMeasurement	PGPCosmos	08-23-01	PegaPS-Data-Entity-Item
ShowReqAccessNode	PegaPS	08-23-01	History-Work-

Name	RuleSet	Ruleset version	Applies to
ShowReqInfoNode	PegaPS	08-23-01	History-Work-
SortBranchList	PegaPS	08-23-01	PegaPS-Data-Entity-Business
TrainingView_Heading	PGPCosmos	08-23-01	PegaPS-Work
UnderwritingApproved Email	PGPCosmos	08-23-01	PegaPS-Work
ValidateDuplicatePerson	PegaPS	08-23-01	PegaPS-Data-Entity-Person
ValidateManufacturer	PGPCosmos	08-23-01	PegaPS-Data-Association
VehicleFromDateMandatory	PegaPS	08-23-01	PegaPS-Data-Association
VehicleInfoRO_1	PGPCosmos	08-23-01	PegaPS-Data-Entity-Vehicle
VehicleResults	PegaPS	08-23-01	PegaPS-Data-Entity-Vehicle
ViewLocations	PegaPS	08-23-01	PegaPS-Data-Entity
ViewNoteInner	PegaPS	08-23-01	PegaPS-Data-Note
D_AssessmentCases	PegaPS	08-23-01	PegaPS-Work
D_BusinessRole	PegaPS	08-23-01	PegaPS-Data-Entity-Business
PGPUtilities PartyRoleInPageGroup--	PegaPS	08-23-01	

Name	RuleSet	Ruleset version	Applies to
(String,String,ClipboardProperty)			
SendEmail Email	PegaPSICM	08-23-01	PegaPS-Work-ICM

8.8 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.8 release.

Name	Ruleset	Ruleset version	Applies to
webwb Vis JS	PegaPS	08-08-01	
pyStartCase	PegaPS	08-08-01	PegaPS-Work-Merge

8.7 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.7 release.

Name	Ruleset	Ruleset version	Applies to
CaseActionArea	PegaPS	08-07-01	PegaPS-Work-Question
CaseActionAreaButtons	PegaPS	08-07-01	PegaPS-Work-Question
CancelFlow	PegaPS	08-07-01	PegaPS
LogOffPS	PegaPS	08-07-01	PegaPS
PostConfirmCancel	PegaPS	08-07-01	PegaPS
PostEvidence	PegaPS	08-07-01	PegaPS-Work
pyStartCase	PGPCosmos	08-07-01	PegaPS-Work-Merge

8.6 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.6 release.

Name	Ruleset	Ruleset version	Applies to
ListCount	PegaPS	08-06-01	
CancelFlow	PegaPS	08-06-01	PegaPS
LoadClassContext	PegaPS	08-06-01	PegaPS-Data-Context-Class
pyStartCase	ICMCosmos	08-06-01	PegaPS-Work-RequestAccess

8.5 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.5 release.

Name	Ruleset	Ruleset version	Applies to
QuestionPageLabel	PegaPS	08-05-01	Embed-PegaQ-Results-QuestionGroup
.QuestionPageLabel	PegaPS	08-05-01	Embed-PegaQ-Results-QuestionGroup
PGPSampleData 8.3	PegaPS	08-05-01	
PGPSampleData 8.4	PegaPS	08-05-01	
PGPSampleDataSCs 08.10	PegaPS	08-05-01	
D_GetQuestionGroupLabel	PegaPS	08-05-01	Rule-PegaQ-QuestionGroup

Name	Ruleset	Ruleset version	Applies to
ListCount	PegaPS	08-05-01	
RelatedEntities	PegaPS	08-05-01	PegaPS-Data-Entity
ManageTeamMobile	PegaPS	08-05-01	PegaPS-Work
HeaderInformation	PegaPS	08-05-01	PegaPS-Data-Entity-Business
ViewDetails	PegaPS	08-05-01	PegaPS-Data-Entity-Business
FacilityLocation	PegaPS	08-05-01	PegaPS-Data-Entity-Facility
AddAttachments	PegaPS	08-05-01	PegaPS-Data-Entity-Vehicle
AddRelations	PegaPS	08-05-01	PegaPS-Work
RelatedPersonnel	PegaPS	08-05-01	PegaPS-Work
AddAssociates	PegaPS	08-05-01	PegaPS-Work-Manage-Associate
pyCaseContent	PegaPS	08-05-01	PegaPS-Work-Manage-Education
pyCaseContent	PegaPS	08-05-01	PegaPS-Work-Manage-Experience
CaseActionArea	PegaPS	08-05-01	PegaPS-Work-Question
CaseActionAreaButtons	PegaPS	08-05-01	PegaPS-Work-Question
CancelFlow	PegaPS	08-05-01	PegaPS
LogOffPS	PegaPS	08-05-01	PegaPS

Name	Ruleset	Ruleset version	Applies to
PostConfirmCancel	PegaPS	08-05-01	PegaPS
pyStartCase	PegaPS	08-05-01	PegaPS-Work-Merge
ViewDetails	PegaPS	08-05-01	PegaPS-Data-Entity-Business
InitiateEvent	PegaPS	08-05-01	PegaPS-Work-Event-Initiate
InitiateAskQuestion	PegaPS	08-05-01	PegaPS-Work-Question
GovtServicesDetails	PegaPSPortals	08-05-01	PegaPS-Work
pyCaseContent	PegaPSUserServices	08-05-01	PegaPS-Work-User-ChangePassword
ForgotPassword	PegaPSUserServices	08-05-01	PegaPS-Work-User-ForgotPassword
Registration	PegaPSUserServices	08-05-01	PegaPS-Work-User-Registration
pyStartCase	PGPCosmos	08-05-01	PegaPS-Work-Entity-Facility-Add
pyStartCase	PGPCosmos	08-05-01	PegaPS-Work-Manage-Branch
pyStartCase	PGPCosmos	08-05-01	PegaPS-Work-Manage-Member
pyStartCase	PGPCosmos	08-05-01	PegaPS-Work-Merge

8.3 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.3 release.

Name	Ruleset	Ruleset version	Applies to
RelatedEntities	PegaPS	08-03-01	PegaPS-Data-Entity
PostEvidence	PegaPS	08-03-01	PegaPS-Work
RelatedEntities	PegaPS	08-03-01	PegaPS-Data-Entity
SetStateLabel	PegaPS	08-03-01	PegaPS-Data-Address
EntityHasCases	PegaPS	08-03-01	PegaPS-Data-Entity
ViewAllCases	PegaPS	08-03-01	PegaPS-Work
InvestigationAssociationControl	PegaPSICM	08-03-01	
RelatedEntities	PegaPSICM	08-03-01	PegaPS-Data-Entity
RelatedEvents	PegaPSICM	08-03-01	PegaPS-Work
RelatedAllEventsList	PegaPSICM	08-03-01	PegaPS-Work-ICM
SubjectRelatedCasesListAll	PegaPSICM	08-03-01	PegaPS-Work-ICM
RelatedInvestigationsVisual	PegaPSICM	08-03-01	PegaPS-Work
RelatedAllSubjects	PegaPSICM	08-03-01	PegaPS-Work-ICM

8.2 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.2 release.

Name	Ruleset	Ruleset version	Applies to
Pgpwebsiteheader	PegaPS	08-02-01	@baseclass
Procurementswebsiteheader	PegaPS	08-02-01	@baseclass
WebLoginComplaints	PegaPS	08-02-01	@baseclass
WebLoginPGP	PegaPS	08-02-01	@baseclass
WebLoginProcurements	PegaPS	08-02-01	@baseclass

8.1 Deprecated rules

The following table lists the deprecated rules of Pega Government Platform for 8.1 release.

Name	Ruleset	Ruleset version	Applies to
LoadBusinessContext	PegaPS	08-01-01	PegaPS-Data-Context-Business
LoadClassContext	PegaPS	08-01-01	PegaPS-Data-Context-Class
D_StateList	PegaPSInt	08-01-01	PegaPS-Int-Config-State

Withdrawn rules

This page lists the list of withdrawn rules of Pega Government Platform for 8.x releases.

'23 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for '23 release.

Name	RuleSet	Ruleset version	Applies to
LogOffPS	PegaPS	08-23-01	PegaPS
PostConfirmCancel	PegaPS	08-23-01	PegaPS
pySetWhenGadgetContext	PegaPS	08-23-01	Embed-Conversation-Question
pySetWhenGadgetContext	PegaPS	08-23-01	Rule-Obj-When
.RelatedCasesCount	PegaPS	08-23-01	PegaPS-Work
pyInvalidTelephoneNumber	PegaPS	08-23-01	@baseclass
pyExtendedAPIs	PegaPS	08-23-01	Rule-Obj-Flow
PGP_Release 8.9	PegaPS	08-23-01	
PreRoll 8.9	PegaPS	08-23-01	
ManageTeamMobile	PegaPS	08-23-01	PegaPS-Work
pyGeolocationTrackingIsEnabled	PegaPS	08-23-01	Data-Portal
PreUpdateBasicDetails	PGPCosmos	08-23-01	PegaPS-Data-Config-Goal
PreUpdateBasicDetails	PGPCosmos	08-23-01	PegaPS-Data-Config-Task
pyCaption Due on	PGPCosmos	08-23-01	PegaPS-Work
NoWorkID	PGPCosmos	08-23-01	@baseclass
pyNoIDHeader	PGPCosmos	08-23-01	Assign-

Name	RuleSet	Ruleset version	Applies to
AddPlan	ICMCosmos	08-23-01	PegaPS-Work-ICM-Investigation-Initiate
pyWorkActionsPerform	PegaPSICM	08-23-01	PegaPS-Work-ICM-Investigation-Initiate
pyWorkActionsReview	PegaPSICM	08-23-01	PegaPS-Work-ICM-Investigation-Initiate
pyCaseMarkerSection	PegaPSICM	08-23-01	Work-Cover-
pyProximityMap	PegaPSICM	08-23-01	@baseclass
pyProximityMapOptions	PegaPSICM	08-23-01	Data-Portal
Refactor_CopyIntToData	PegaPSICM	08-23-01	PegaPS-Data-Config-OptionMap-ICM
pyGeolocationTrackingIsEnabled	PegaPSICM	08-23-01	Data-Portal
Action	TimeMgmt	08-23-01	PS-TimeMgmt-Work-TimeEntry
Comments	TimeMgmt	08-23-01	PS-TimeMgmt-Work-TimeEntry
pyCaseInformation	TimeMgmt	08-23-01	PS-TimeMgmt-Work-TimeEntry
IsActionApprove	TimeMgmt	08-23-01	PS-TimeMgmt-Work-TimeEntry

8.8 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.8 release.

Name	Ruleset	Ruleset version	Rule Type
PGP 7.40	PegaPS	08-08-01	Product
webwb Bootstrap css	PegaPS	08-08-01	Text File
webwb Custom css	PegaPS	08-08-01	Text File
webwb ProgressIndicator js	PegaPS	08-08-01	Text File

8.7 withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.7 release.

Name	Ruleset	Ruleset version	Applies to
pgpDefaultSecured	PegaPS	08-07-01	
CustomRole	PegaPS	08-07-01	Data-Party
pxDeviceType	PegaPS	08-07-01	Index-CircumstanceDefinition
pxIsMobileDevice	PegaPS	08-07-01	Index-CircumstanceDefinition
ProgressColor	PegaPS	08-07-01	PegaPS
ProgressTextSuffix	PegaPS	08-07-01	PegaPS
DispositionType	PegaPS	08-07-01	PegaPS-Data-Config

Name	Ruleset	Ruleset version	Applies to
DateDecimal	PegaPS	08-07-01	PegaPS-Data-Context-Business
MergedFromKey	PegaPS	08-07-01	PegaPS-Data-Snapshot
SetAppLoginPage	PegaPS	08-07-01	Code-Security
NoticeHeaderBkp	PegaPS	08-07-01	PegaPS-Work
RachGrantConsentAgreement	PegaPS	08-07-01	PegaPS-Work
BusinessBranchDetailsRO1	PegaPS	08-07-01	PegaPS-Data-Entity-Business
IACAuthentication	PegaPS	08-07-01	Code-Security
DeleteDocList	PegaPS	08-07-01	Pega-Ext-ExpExplorer-Configuration-Document
AssociateRelatedEvents	PegaPS	08-07-01	PegaPS-Work-Event-Initiate
ValidateAssociates	PegaPS	08-07-01	PegaPS-Work-Manage-Associate
getEmailSenderInfo	PegaPS	08-07-01	PegaPS-Work-RequestAccess
PostAddAttachments	PegaPS	08-07-01	PegaPS-Data
pyAttachContent	PegaPS	08-07-01	PegaPS-Work
AUTSetAttachmentToFile	PegaPS	08-07-01	PegaPS
AUTSetLinkData	PegaPS	08-07-01	PegaPS-Data-Link

Name	Ruleset	Ruleset version	Applies to
EndUser	PegaPS	08-07-01	Data-Portal
PreReviewDocument	PegaPS	08-07-01	PegaPS-Work
SetRadiusRange	PegaPS	08-07-01	PegaPS-Work
SetRelatedEvents	PegaPS	08-07-01	PegaPS-Work-Event-Initiate
SetLinkedFromTo	PegaPS	08-07-01	PegaPS-Work-Manage-Associate
SetCaseStatusForSLA	PegaPS	08-07-01	PegaPS-Work-TransferOwnership
PegaPSEndUser	PegaPS	08-07-01	Data-Portal
ReviewRequest_3	PegaPS	08-07-01	PegaPS-Work-RequestAccess
IsMultipleConfiguredCounties	PegaPS	08-07-01	@baseclass
IsSingleConfiguredCountry	PegaPS	08-07-01	@baseclass
PGPRulesets_pyruleset	PegaPS	08-07-01	@baseclass
DuplicateTemplate	PegaPS	08-07-01	Pega-Ext-ExpExplorer-Configuration-InterviewTemplate
IsAttachmentTypeDocument	PegaPS	08-07-01	PegaPS
ShowCaseActions	PegaPS	08-07-01	PegaPS-Work
ShowManageTeam	PegaPS	08-07-01	PegaPS-Work

Name	Ruleset	Ruleset version	Applies to
NonMandatoryAddressFormWithCurrentLocation	PegaPS	08-07-01	PegaPS-Data-Address
AnonymousReporting	PegaPS	08-07-01	PegaPS-Data-Event
CaseHistoryTab	PegaPS	08-07-01	PegaPS-Work
EventDetailsPreview	PegaPS	08-07-01	PegaPS-Work-Event
RegistrationInfo	PegaPSUserServices	08-07-01	PegaPS-Work-User-Registration
D_DocumentSourceOptions	PGPCosmos	08-07-01	PegaSocial-Document
InterviewReport	PGPCosmos	08-07-01	PegaPS-Data-Interview
TestTraining	PGPCosmos	08-07-01	PegaPS-Data-Training
ReportPDFWrapper	PGPCosmos	08-07-01	PegaPS-Work
EnterCaseDetails	PGPCosmos	08-07-01	PegaSocial-Document
OpenByHandle	PGPCosmos	08-07-01	@baseclass
IsApplicableForBusiness	PGPCosmos	08-07-01	PegaPS-Work-ApplicationRequest
IsApplicableForFacility	PGPCosmos	08-07-01	PegaPS-Work-ApplicationRequest
IsApplicableForPerson	PGPCosmos	08-07-01	PegaPS-Work-ApplicationRequest
CreateForm_Default	PGPCosmos	08-07-01	PegaPS-Work-Entity-Vehicle-Add

Name	Ruleset	Ruleset version	Applies to
LoadDocumentSourceOptions	PGPCosmos	08-07-01	Code-Pega-List
Apply	PGPCosmos	08-07-01	PegaPS-Work-ApplicationRequest
EditAction	PGPCosmosOverride	08-07-01	PegaPS-Work-ActivityPlan
EditAction	PGPCosmosOverride	08-07-01	PegaPS-Work-Goal
EditAction	PGPCosmosOverride	08-07-01	PegaPS-Work-Task
pxDeviceType	PegaPSICM	08-07-01	Index-CircumstanceDefinition
ApplicationRequestReviewWorkBasket	ICMCosmos	08-07-01	PegaPS-Work-ApplicationRequest
UserPortal	ICMCosmos	08-07-01	PegaPS-Data-Portal
SelectItems	ICMCosmos	08-07-01	PegaPS-Work-ICM
ReportPDFWrapper	ICMCosmos	08-07-01	PegaPS-Work-ICM-Investigation-Initiate
pyPopulateCaseContentsInner	PegaPSICM	08-07-01	Assign-Worklist
pyPopulateCaseContentsInner	ICMCosmos	08-07-01	Assign-Worklist
getEmailSenderInfo	PegaPSICM	08-07-01	PegaPS-Work-ICM-Investigation-Initiate

Name	Ruleset	Ruleset version	Applies to
ICMAgent	PegaPSICMPortals	08-07-01	Data-Portal
CaseWorker	PegaPSICM	08-07-01	Data-Portal

8.6 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.6 release.

Name	Ruleset	Ruleset version	Applies to
pyEmail	PegaPS	08-06-01	@baseclass
PGP 08.10	PegaPS	08-06-01	
PGPSampleData 7.40	PegaPS	08-06-01	
PGPSampleData 8.3	PegaPS	08-06-01	
PGPSampleData 8.4	PegaPS	08-06-01	
PGP_ICM_Demo 7.40	PegaPS	08-06-01	
gella-pegasystems-com-CodeFragment	PegaPS	08-06-01	
AddAssociates	PegaPS	08-06-01	PegaPS-Work-Manage-Associate
pyCaseContent	PegaPS	08-06-01	PegaPS-Work-Manage-Education
pyCaseContent	PegaPS	08-06-01	PegaPS-Work-Manage-Experience
pyUploadFile	PegaPS	08-06-01	Data-WorkAttach-File

Name	Ruleset	Ruleset version	Applies to
pyCaption CommType	PegaPS	08-06-01	PegaPS-Data-Comm-Phone
AddAssociates	PegaPS	08-06-01	PegaPS-Work-Manage-Associate
Web-Login-Member	PegaPS	08-06-01	@baseclass
Web-Login-test	PegaPS	08-06-01	@baseclass
InitiateEvent	PegaPS	08-06-01	PegaPS-Work-Event-Initiate
InitiateAskQuestion	PegaPS	08-06-01	PegaPS-Work-Question
SetMergeStatus	PegaPS	08-06-01	PegaPS-Data-Entity
PersistInterview	PegaPS	08-06-01	PegaPS-Work
ForgotPassword	PegaPSUserServices	08-06-01	PegaPS-Work-User-ForgotPassword
Registration	PegaPSUserServices	08-06-01	PegaPS-Work-User-Registration
EditAction	PGPCosmos	08-06-01	PegaPS-Work
pyCaption CreateNew	PGPCosmos	08-06-01	PegaPS-Work-Manage
CaseDetails	PGPCosmosOverride	08-06-01	PegaPS-Work-Event
pyRefresh	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Business-View
pyWorkCommonActions	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Business-View

Name	Ruleset	Ruleset version	Applies to
pyRefresh	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Facility-View
pyWorkCommonActions	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Facility-View
pyRefresh	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Household-View
pyWorkCommonActions	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Household-View
pyRefresh	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Person-View
pyWorkCommonActions	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Person-View
pyRefresh	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Vehicle-View
pyWorkCommonActions	PGPCosmosOverride	08-06-01	PegaPS-Work-Entity-Vehicle-View
ProgressIndicator	PegaPSICM	08-06-01	
AssociateEvent_RDL	ICMCosmos	08-06-01	PegaPS-Data-Event
SearchCriteria	ICMCosmos	08-06-01	PegaPS-Data-Event
pyCaseMainInner	PegaPSICM	08-06-01	PegaPS-Work-Manage
InitializeInterview	PegaPSICM	08-06-01	PegaPS-Work
IsUnderInvestigation	PegaPSICM	08-06-01	PegaPS-Work-ICM-Investigation
PgpServices	PGPOverride	08-06-01	

Name	Ruleset	Ruleset version	Applies to
webwb Registration js	PGPOverride	08-06-01	
UserServices	PGPOverride	08-06-01	
CustomAuthentication	PGPOverride	08-06-01	Code-Security
CustomAuthVerification	PGPOverride	08-06-01	Code-Security
Web-Login-Member	PGPOverride	08-06-01	@baseclass
Web-Login-test	PGPOverride	08-06-01	@baseclass
WebLoginMain	PGPOverride	08-06-01	@baseclass

8.5 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.5 release.

Name	Ruleset	Ruleset version	Applies to
Inline	PegaPS	08-05-01	PegaPS
Order	PegaPS	08-05-01	PegaPS
SLAName	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
pyCaption Investigation	PegaPS	08-05-01	@baseclass
wss normalizemin css	PegaPS	08-05-01	
Settings	PegaPS	08-05-01	PegaPS-Landing
AttachmentFeedDescription	PegaPS	08-05-01	

Name	Ruleset	Ruleset version	Applies to
ProgressIndicator	PegaPS	08-05-01	
pyAttachmentFeed Description	PegaPS	08-05-01	
RangeSlider	PegaPS	08-05-01	
PGPFooter	PegaPS	08-05-01	@baseclass
PgpNavigation	PegaPS	08-05-01	@baseclass
PgpServices	PegaPS	08-05-01	@baseclass
Pgpwebsiteheader	PegaPS	08-05-01	@baseclass
ProcurementService s	PegaPS	08-05-01	@baseclass
Procurementswebsi teheader	PegaPS	08-05-01	@baseclass
SliderModalTemplat eStyles	PegaPS	08-05-01	@baseclass
ModalSlider	PegaPS	08-05-01	PegaPS
Are you sure you want to delete from this model?	PegaPS	08-05-01	PegaPS-Data-Address
Are you sure you want to delete from this model?	PegaPS	08-05-01	PegaPS-Data-Association
Are you sure you want to delete from this model?	PegaPS	08-05-01	PegaPS-Data-Education
Are you sure you want to delete from this model?	PegaPS	08-05-01	PegaPS-Data-Entity-Person

Name	Ruleset	Ruleset version	Applies to
Are you sure you want to delete from this model?	PegaPS	08-05-01	PegaPS-Data-Training
DocumentationReport	PegaPS	08-05-01	PegaPS-Work
pyCaseMain	PegaPS	08-05-01	PegaPS-Work
pyB2CCaseMainConfirm	PegaPS	08-05-01	PegaPS-Work
EventDetails	PegaPS	08-05-01	PegaPS-Work-Event-Initiate
pyCaseMain	PegaPS	08-05-01	Work-
AssessmentConfiguration	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
AssessmentConfiguration_RG	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
AssessmentList	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
AssessmentList_RG	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
AssessmentNoResults	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
pyMainMenu	PegaPS	08-05-01	Pega-Landing
pyCaption Agent	PegaPS	08-05-01	@baseclass
pyCaption Airport	PegaPS	08-05-01	@baseclass
pyCaption Any	PegaPS	08-05-01	@baseclass
pyCaption High	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Russian	PegaPS	08-05-01	@baseclass
pyActionPrompt Click to collapse	PegaPS	08-05-01	@baseclass
pyActionPrompt Click to expand	PegaPS	08-05-01	@baseclass
pyButtonLabel Request access	PegaPS	08-05-01	@baseclass
pyCaption Active	PegaPS	08-05-01	@baseclass
pyCaption Administrator	PegaPS	08-05-01	@baseclass
pyCaption Apply	PegaPS	08-05-01	@baseclass
pyCaption Approve	PegaPS	08-05-01	@baseclass
pyCaption Audit	PegaPS	08-05-01	@baseclass
pyCaption Blue	PegaPS	08-05-01	@baseclass
pyCaption CaseManager	PegaPS	08-05-01	@baseclass
pyCaption CaseWorker	PegaPS	08-05-01	@baseclass
pyCaption Client	PegaPS	08-05-01	@baseclass
pyCaption Compliant	PegaPS	08-05-01	@baseclass
pyCaption Critical	PegaPS	08-05-01	@baseclass
pyCaption Current operator	PegaPS	08-05-01	@baseclass
pyCaption Custom	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Customer	PegaPS	08-05-01	@baseclass
pyCaption days	PegaPS	08-05-01	@baseclass
pyCaption Dependent	PegaPS	08-05-01	@baseclass
pyCaption Description	PegaPS	08-05-01	@baseclass
pyCaption Details	PegaPS	08-05-01	@baseclass
pyCaption Document	PegaPS	08-05-01	@baseclass
pyCaption E-Mail	PegaPS	08-05-01	@baseclass
pyCaption Employer	PegaPS	08-05-01	@baseclass
pyCaption English	PegaPS	08-05-01	@baseclass
pyCaption Entity Type	PegaPS	08-05-01	@baseclass
pyCaption Event	PegaPS	08-05-01	@baseclass
pyCaption Experience	PegaPS	08-05-01	@baseclass
pyCaption Expired	PegaPS	08-05-01	@baseclass
pyCaption Fax	PegaPS	08-05-01	@baseclass
pyCaption First Name	PegaPS	08-05-01	@baseclass
pyCaption French	PegaPS	08-05-01	@baseclass
pyCaption German	PegaPS	08-05-01	@baseclass
pyCaption Green	PegaPS	08-05-01	@baseclass
pyCaption Home	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Home phone	PegaPS	08-05-01	@baseclass
pyCaption I	PegaPS	08-05-01	@baseclass
pyCaption IN	PegaPS	08-05-01	@baseclass
pyCaption Inactive	PegaPS	08-05-01	@baseclass
pyCaption Individual	PegaPS	08-05-01	@baseclass
pyCaption Last Login	PegaPS	08-05-01	@baseclass
pyCaption Last Name	PegaPS	08-05-01	@baseclass
pyCaption Link	PegaPS	08-05-01	@baseclass
pyCaption List	PegaPS	08-05-01	@baseclass
pyCaption Low	PegaPS	08-05-01	@baseclass
pyCaption Map	PegaPS	08-05-01	@baseclass
pyCaption Price	PegaPS	08-05-01	@baseclass
pyCaption Primary	PegaPS	08-05-01	@baseclass
pyCaption Medium	PegaPS	08-05-01	@baseclass
pyCaption months	PegaPS	08-05-01	@baseclass
pyCaption Navigation	PegaPS	08-05-01	@baseclass
pyCaption Nearby Cases	PegaPS	08-05-01	@baseclass
pyCaption New	PegaPS	08-05-01	@baseclass
pyCaption No	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption No attachments	PegaPS	08-05-01	@baseclass
pyCaption Notes	PegaPS	08-05-01	@baseclass
pyCaption Experience	PegaPS	08-05-01	PegaPS-Data-Entity-Person
pyCaption Last Login	PegaPS	08-05-01	PegaPS-Data-Entity-Person
pyCaption Last Name	PegaPS	08-05-01	PegaPS-Data-Entity-Person
pyCaption Open	PegaPS	08-05-01	@baseclass
pyCaption Operator	PegaPS	08-05-01	@baseclass
pyCaption Other	PegaPS	08-05-01	@baseclass
pyCaption Others	PegaPS	08-05-01	@baseclass
pyCaption Pager	PegaPS	08-05-01	@baseclass
pyCaption Parent	PegaPS	08-05-01	@baseclass
pyCaption Partner	PegaPS	08-05-01	@baseclass
pyCaption Personal	PegaPS	08-05-01	@baseclass
pyCaption Pink	PegaPS	08-05-01	@baseclass
pyCaption Province	PegaPS	08-05-01	@baseclass
pyCaption Question	PegaPS	08-05-01	@baseclass
pyCaption Read-only	PegaPS	08-05-01	@baseclass
pyCaption Reassign	PegaPS	08-05-01	@baseclass
pyCaption Reference	PegaPS	08-05-01	@baseclass
pyCaption Reject	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Related Cases	PegaPS	08-05-01	@baseclass
pyCaption Secondary	PegaPS	08-05-01	@baseclass
pyCaption Service	PegaPS	08-05-01	@baseclass
pyCaption Services	PegaPS	08-05-01	@baseclass
pyCaption Single	PegaPS	08-05-01	@baseclass
pyCaption Specific user	PegaPS	08-05-01	@baseclass
pyCaption SSN	PegaPS	08-05-01	@baseclass
pyCaption Storage	PegaPS	08-05-01	@baseclass
pyCaption Take Action	PegaPS	08-05-01	@baseclass
pyCaption Target	PegaPS	08-05-01	@baseclass
pyCaption Tenant	PegaPS	08-05-01	@baseclass
pyCaption Timeline	PegaPS	08-05-01	@baseclass
pyCaption Tip	PegaPS	08-05-01	@baseclass
pyCaption Training	PegaPS	08-05-01	@baseclass
pyCaption Update	PegaPS	08-05-01	@baseclass
pyCaption User Name	PegaPS	08-05-01	@baseclass
pyCaption Users	PegaPS	08-05-01	@baseclass
pyCaption Withdraw	PegaPS	08-05-01	@baseclass
pyCaption Work queue	PegaPS	08-05-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Workbasket	PegaPS	08-05-01	@baseclass
pyCaption Yes	PegaPS	08-05-01	@baseclass
WebLoginComplaints	PegaPS	08-05-01	@baseclass
WebLoginPGP	PegaPS	08-05-01	@baseclass
WebLoginProcurements	PegaPS	08-05-01	@baseclass
DeleteEducation	PegaPS	08-05-01	PegaPS-Data-Education
DeleteLocation	PegaPS	08-05-01	PegaPS-Data-Address
DeleteAssociation	PegaPS	08-05-01	PegaPS-Data-Association
AddToDeleteList	PegaPS	08-05-01	PegaPS-Data-Entity-Associate
DeleteRelation	PegaPS	08-05-01	PegaPS-Data-Entity-Person
DeleteTraining	PegaPS	08-05-01	PegaPS-Data-Training
PreAssessmentConfiguration	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
RemoveTempId	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
SetTempIdForNewRow	PegaPS	08-05-01	Rule-PegaQ-Questionnaire

Name	Ruleset	Ruleset version	Applies to
IsPGPApplications	PegaPS	08-05-01	PegaPS-Data-Context-Application
PegaPS_bkp_23Jun	PegaPS	08-05-01	
AssessmentConfigurationExists	PegaPS	08-05-01	Rule-PegaQ-Questionnaire
IsSampleData	PegaPS	08-05-01	Rule-Admin-Product
PegaPS_UIKit7_07July_bkp	PegaPS	08-05-01	
LayoutGroup	PegaPSUI	08-05-01	PegaPS
Footer	PegaPSUserServices	08-05-01	PegaPS-Work-User-Registration
Header	PegaPSUserServices	08-05-01	PegaPS-Work-User-Registration
Intake	PGPCosmos	08-05-01	PegaPS-Work
Intake	PGPCosmos	08-05-01	PegaPS-Work
.BuiltOnAppCSV	PegaPSICM	08-05-01	PegaPS
InvestigationAssociationControl	PegaPSICM	08-05-01	
ConfirmDeactivate	PegaPSICM	08-05-01	PegaPS-Data-Config-ActivityPlan
RelatedEntities	PegaPSICM	08-05-01	PegaPS-Data-Entity
RelatedInvestigationsVisual	PegaPSICM	08-05-01	PegaPS-Work
RelatedAllEventsList	PegaPSICM	08-05-01	PegaPS-Work-ICM
SubjectRelatedCasesListAll	PegaPSICM	08-05-01	PegaPS-Work-ICM

Name	Ruleset	Ruleset version	Applies to
RelatedInvestigationsVisual	PegaPSICM	08-05-01	PegaPS-Work
RelatedAllSubjects	PegaPSICM	08-05-01	PegaPS-Work-ICM

8.4 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.4 release.

Name	Ruleset	Ruleset version	Applies to
ConfirmExternal	PegaPS	08-04-01	PegaPS
ConfirmExternal	PegaPS	08-04-01	PegaPS
Log off	PegaPS	08-04-01	Code-Security
Database-Authorization-NoModifyAccess	PegaPS	08-04-01	@baseclass
Database-Authorization-NoOpenAccess	PegaPS	08-04-01	@baseclass
pyCaption Category	PegaPS	08-04-01	@baseclass
pyCaption Create	PegaPS	08-04-01	@baseclass
pyCaption Create new	PegaPS	08-04-01	@baseclass
pyCaption Email	PegaPS	08-04-01	@baseclass
pyCaption Female	PegaPS	08-04-01	@baseclass
pyCaption First Name	PegaPS	08-04-01	@baseclass
pyCaption Georgia	PegaPS	08-04-01	@baseclass

Name	Ruleset	Ruleset version	Applies to
pyCaption Male	PegaPS	08-04-01	@baseclass
pyCaption My Cases	PegaPS	08-04-01	@baseclass
pyCaption Name	PegaPS	08-04-01	@baseclass
pyCaption Owner	PegaPS	08-04-01	@baseclass
pyCaption Person	PegaPS	08-04-01	@baseclass
pyCaption Phone	PegaPS	08-04-01	@baseclass
pyCaption Role	PegaPS	08-04-01	@baseclass
pyCaption Search	PegaPS	08-04-01	@baseclass
pyCaption Select an image	PegaPS	08-04-01	@baseclass
pyCaption Subject	PegaPS	08-04-01	@baseclass
Web-Session-Return	PegaPS	08-04-01	@baseclass
Web-Session-Return	PegaPS	08-04-01	@baseclass
DisplayAttachmentFile	PegaPS	08-04-01	PegaPS
pySecureFeatures	PegaPS	08-04-01	@baseclass
ShowUploadAvatar	PegaPS	08-04-01	PegaPS-Data-Entity-Person
ShowUploadAvatar	PegaPS	08-04-01	PegaPS-Data-Entity-Vehicle
LocationRO	PegaPSICM	08-04-01	PegaPS-Data-Address
pyCaseDetails	PegaPSICM	08-04-01	PegaPS-Work-Manage

Name	Ruleset	Ruleset version	Applies to
HaveDocumentDeletePrivileges	PegaPSICM	08-04-01	Link-Attachment

8.3 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.3 release.

Name	Ruleset	Ruleset version	Applies to
PGPSampleData 08.10	PegaPS	08-03-01	
.Name.FullName	PegaPS	08-03-01	PegaPS-Data-Entity-Person
.Name.FullNameWithSalutation	PegaPS	08-03-01	PegaPS-Data-Entity-Person
TreeNavigation7	PegaPS	08-03-01	PegaPS-Work
pyRDLPaginator	PegaPS	08-03-01	PegaPS
Association	PegaPS	08-03-01	PegaPS-Data-Entity
AssociationList	PegaPS	08-03-01	PegaPS-Data-Entity
ViewCasesAction	PegaPS	08-03-01	PegaPS-Data-Entity
AUTSetDataForManageMembersNewHousehold	PegaPS	08-03-01	PegaPS
AUTSetExistingHHMembersListData	PegaPS	08-03-01	PegaPS
AUTSetDataForManageMembersUseCase2	PegaPS	08-03-01	PegaPS-Work

Name	Ruleset	Ruleset version	Applies to
AUTSetDataForManageMembersUseCase3	PegaPS	08-03-01	PegaPS-Work
AUTSetDataForManageMembersUseCase4	PegaPS	08-03-01	PegaPS-Work
HasAssociations	PegaPS	08-03-01	PegaPS-Data-Entity
ManageAssociates	PegaPSICM	08-03-01	PegaPS-Work-Manage-Associate
Association	PegaPSICM	08-03-01	PegaPS-Data-Entity
MyWorkCasesList	PegaPSICM	08-03-01	PegaPS-Data-Entity
Interview	PegaPSICM	08-03-01	PegaPS-Work
pyCaseAssetsMobile	PegaPSICM	08-03-01	PegaPS-Work
CustomAuditList	PegaPSICM	08-03-01	PegaPS-Work-ICM
CustomAuditModalWindow	PegaPSICM	08-03-01	PegaPS-Work-ICM
CustomAudit	PegaPSICM	08-03-01	PegaPS-Work-ICM
pyRDLPaginator	PegaPSICM	08-03-01	PegaPS-Work-ICM
Subject	PegaPSICM	08-03-01	PegaPS-Work-ICM-Investigation
pyCaseInformation	PegaPSICM	08-03-01	PegaPS-Work-ICM-Investigation-Initiate
CheckDuplicateAssociation	PegaPSICM	08-03-01	PegaPS-Work-Manage-Associate
ShowInWork	PegaPSICM	08-03-01	PegaPS

Name	Ruleset	Ruleset version	Applies to
AddNote	PegaPSICM	08-03-01	PegaPS-Work-ICM
CustomAudit	PegaPSICM	08-03-01	PegaPS-Work-ICM
pyDefault	PegaPSICM	08-03-01	PegaPS-Work
InitializeInterview_Ext	PegaPSICM	08-03-01	PegaPS-Work-ICM
InitializeEvidence_Ext	PegaPSICM	08-03-01	PegaPS-Work-ICM-Investigation
PostEvidence_Ext	PegaPSICM	08-03-01	PegaPS-Work-ICM-Investigation
HasPrivilegeToManageAssociates	PegaPSICM	08-03-01	PegaPS
IsOperatorAuthorized	PegaPSICM	08-03-01	PegaPS
IsInvestigation	PegaPSICM	08-03-01	PegaPS-Work-ICM
IsSubject	PegaPSICM	08-03-01	PegaPS-Work-ICM

8.2 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.2 release.

Name	Ruleset	Ruleset version	Applies to
Entity	PegaPS	08-02-01	PegaPS-Work
pyGridPaginator	PegaPS	08-02-01	Data-
AddNote	PegaPS	08-02-01	PegaPS
Notes	PegaPS	08-02-01	PegaPS
Notes	PegaPS	08-02-01	PegaPS

Name	Ruleset	Ruleset version	Applies to
Actions	PegaPS	08-02-01	PegaPS-Data-Entity-Facility
Actions	PegaPS	08-02-01	PegaPS-Data-Entity-Household
Actions	PegaPS	08-02-01	PegaPS-Data-Entity-Vehicle
pyCaseHeaderTitle	PegaPS	08-02-01	Work-
SaveNotes	PegaPS	08-02-01	PegaPS
EditInterview	PegaPS	08-02-01	PegaPS-Data-Interview
AddNote	PegaPS	08-02-01	PegaPS
EditEvidence	PegaPS	08-02-01	PegaPS-Data-Evidence
EditEvidence	PegaPS	08-02-01	PegaPS-Work
EditInterview	PegaPS	08-02-01	PegaPS-Work
PostAddNote	PegaPS	08-02-01	PegaPS
PreAddNote	PegaPS	08-02-01	PegaPS
PostEditInterview	PegaPS	08-02-01	PegaPS-Data-Interview
PreEditEvidence	PegaPS	08-02-01	PegaPS-Work
PostEditEvidence	PegaPS	08-02-01	PegaPS-Work
PostEditInterview	PegaPS	08-02-01	PegaPS-Work
SetInterviewTitle	PegaPS	08-02-01	PegaPS-Work
Notes	PegaPSICM	08-02-01	PegaPS
NotesHeader	PegaPSICM	08-02-01	PegaPS
ViewNotes	PegaPSICM	08-02-01	PegaPS

Name	Ruleset	Ruleset version	Applies to
SaveEvidenceAssociations	PegaPSICM	08-02-01	PegaPS-Work
PersistEmbeddedPage	PegaPSICM	08-02-01	PegaPS-Data-Interview
PersistInterview	PegaPSICM	08-02-01	PegaPS-Work
AddEvidence	PegaPSICM	08-02-01	PegaPS-Work
EditEvidence	PegaPSICM	08-02-01	PegaPS-Work
SetInterviewID	PegaPSICM	08-02-01	PegaPS-Data-Interview
InitializeInterview	PegaPSICM	08-02-01	PegaPS-Work
SetInterviewTitle	PegaPSICM	08-02-01	PegaPS-Work
InitializeInterview	PegaPSICM	08-02-01	PegaPS-Work-ICM

8.1 Withdrawn rules

The following table lists the withdrawn rules of Pega Government Platform for 8.1 release.

Name	Ruleset	Ruleset version	Applies to
ShowAttachmentList	PegaPS	08-01-01	PegaPS-Data-Attachment-File
GenerateVerificationCode	PegaPSUserServices	08-01-01	PegaPS-Work-User-Registration

Product overview

Pega Government Platform™ (PGP) provides a rich set of features designed to enhance the customer experience, improve user productivity, and increase customer satisfaction. The solution provides reusable components or processes that can be used to build an application or case by using Pega App Studio or Pega Dev Studio.

The following sections describe key functional areas and features of the application that you can use as-is or extend to meet your business needs.

- **Application intake features**
- **Manage information features**
- **Case reviewer features**
- **Association management framework**
- **Entity profile views**
- **Investigative case management**
- **Pega Government Platform case types and workflows**
- **Roles, portals, and dashboards in Pega Government Platform**
- **Primary data entities**
- **Time management**
- **Further reading**

Application intake features

Government agencies provide different services catering to their constituents. Constituents can be a person, business or any entity. PGP provides the following application intake-oriented features:

Basic person information

A process that captures basic person information, validates it, and checks for the presence of duplicate information.

Multiple entity component can be used to capture information of multiple person entities as part of a single step in any case type.

Detailed person information

A process that captures detailed person information like ethnicity, race, communication preferences, and so on, validates it, and checks for the presence of duplicate information.

Business information

A process that captures business information like legal name, trade name, office location, communication details, and so on, validates it, and checks for the presence of duplicate information.

Facility information

A process that captures facility information like facility name, contact details, location, and so on, validates it, and checks for the presence of duplicate information.

Vehicle information

A process that captures vehicle information like model, make, registration number, garage location, owner details, and so on, validates it, and checks for the presence of duplicate information.

Household information

A process that captures household information like household name, type, description, location, members of the household, and so on.

Persist object component

A generic component that saves entity related information and data object information in the system of record.

Capture experience

A process that captures the experience details of a person.

Capture training

A process that captures the training details of a person.

Capture location

A process that captures the location details of an entity.

Consent agreement

Consent agreement is a feature that displays an actionable consent agreement screen. This screen contains customizable text for the agreement clauses of your organization, a check box to signify agreement, and a field to provide a signature. Pega Government Platform extends Pega App Studio to provide additional business configuration capabilities for the consent agreement.

Item Information

A process that captures detailed Item information like Manufacturer, Owner, Dimensions, subitems, and so on, validates it, and checks for the presence of duplicate information.

Basic Item Information

A process that captures basic person information, validates it, and checks for the presence of duplicate information.

Manage information features

Use the following features to manage information about entities related to any government case.

Manage education

A process that manages the education details of a person and stores those details in the system of record.

Manage experience

A process that manages the experience details of a person and stores the details in the system of record.

Manage training

A process that manages the training details of a person and stores the details in the system of record.

Manage location

A process that manages the location details of an entity and stores the details in the system of record.

Manage facility

A process that manages the facility entity details and stores the details in the system of record.

Manage vehicle

A process that manages the vehicle entity details and stores the details in the system of record.

Manage household

A process that manages the household entity details and stores the details in the system of record.

Manage household members

A process that manages the members of household entity. When you add a new member or remove an existing member from a household, a new household is created, and the existing household becomes inactive.

Manage item

A process that manages the item details and stores the details in the system of record.

Manage Basic Item

A process that manages the item basic details and stores the details in the system of record.

Manage business

A process that manages the business details and stores the details in the system of record.

Manage person with basic details

A process that manages the person basic details and stores the details in the system of record.

Manage person with complete details

A process that manages the person details and stores the details in the system of record.

Manage multiple persons

A process that manages the multiple person details and stores the details in the system of record.

Time entry

A process that logs time entry of a user against any case.

Program configurator

A Program configurator is a tool allowing agencies to manage and customize the needs of the customer for programs like regulatory and integration, Citizen services, immigration-oriented programs more effectively and efficiently by interacting with constituents and corporate entities. The program Configurator software gives you greater flexibility and reduces the proliferation of items for uniquely configured program.

- A program configurator allows you to make use of the PGP application features with the ability to Configure profiles for individual constituents and corporate entities. It also allows you to configure the PGP Case Reviewer Features to help the application request case type to review the program throughout the life cycle. These case – review features such as Upload and verify documents, review checklist, evaluate to name a few aids the case review process that can be reused and customized in the application request case type to meet your business needs.
- The application request case type enables users to apply for any program or any of its descendants and takes you through steps to achieve end to end process of intake vs the review of the program so configured earlier. The application request case type allows business users to streamline application processes such as capturing image of a program, entity details, enables you to apply for a program

or any of its descendants, for example, a license. Using application request, you can bring all the services of your organization under one case type. The application request case type allows business users to streamline application processes, such as capturing entity details, document intake, consent agreement, and so on from start to finish. The business managers can review and approve the attached or uploaded documents, review the checklist, evaluate the process, and approve the application.

- The program configurator has an ability to view the programs and its descendants with separate views. To save time, you can reuse dynamic views, which are standard forms that your application automatically manages for each program that you define.

As a part of the program configurator a user can create a License configuration a specialized version of a program configurator by Providing data to set up a new license. License Configuration is a Comprehensive and configurable application that streamlines the licensing and certification application process from start to finish, including evaluations, document upload and its verifications.

Program configurator provides users with the following capabilities:

- Provide seamless and simple processes for constituents, businesses, and agency employees
- Reduce processing and minimize touch points to provide straight-through processing
- Provide a modern government platform to meet future requirements and allow business users to make policy changes
- Reduce project implementation time and accelerate project delivery
- Improve communication and interaction with constituents and businesses

Program definition

Pega Government Platform (PGP) provides comprehensive and standardized program management capabilities to accelerate development with transparency and compliance. The Program definition case type in PGP helps define and manage programs for government purposes and customize them as required. This case type provides end-to-end capabilities for program management and configuration that enable agencies to increase efficiency.

You can use Program definition to define and manage programs and licenses for various entities available in PGP (Pega Government Platform) such as person, business, item, vehicle, and facility. To introduce a new program or license in the system, users can create a new Program definition case type from the Case manager portal. From the Program definition landing page, you can search or view a program or a license.

Using program definition you can:

- Define new program
- Edit program
- Copy program
- Search for a program

Program finder

In Pega Government Platform™, Program finder is a questionnaire case type that you can use as prescreening for programs. This prescreening would help users identify the eligible programs and licenses they can apply for. Government agencies often use prescreening for programs to provide the list of eligible programs for which an applicant is eligible.

The Program finder case in Pega Government Platform™ comes with set of sample questions, based on the responses provided to the questions, the system displays a list of programs and licenses for which the user is eligible. Users can select from the eligible programs and apply for the same.

Case reviewer features

Government case workers have various needs when reviewing the case through its lifecycle. Pega Government Platform provides the following features to aid the case review process that can be reused and customized to meet your business needs.

Upload document component

Upload document component allows users to upload documents as part of any case. This component enables business users to dynamically configure the documents to be uploaded for any case with configurations like mandatory or non-mandatory documents, size of the documents.

Verify document component

Verify document component allows the users to view the list of the uploaded documents and provides an option to approve or reject the documents. Users can opt to either approve or reject each document with comments. It also enables the business users to configure the change of stage on rejection.

Nearby location component

Nearby location component allows users to view the list of nearby cases, nearby places and the nearby entities that are issued on a map based on the radius input calculated based on the location address provided in the application. The displayed results can be selected for further processing. This component can be added as a step in any case type and the location source, nearby results can be configured easily from App Studio.

Evaluate process

Evaluate process helps an evaluator or reviewer evaluate the application against various criteria that is important to your organization. After the application is evaluated, the system calculates a total evaluation score based on a weighted formula and recommends one or more next actions to take.

Pega Government Platform extends Pega App Studio to provide additional business configuration capabilities for evaluation criteria.

Review checklist

Review checklist is a process through which a reviewer can review the application against various checklist items. The progress can be tracked by selecting the check boxes that correspond to items as they are completed.

Pega Government Platform extends Pega App Studio to provide additional business configuration capabilities for review checklist.

Add interview

Add interview is a component that allows users to add interviews by selecting question templates, entering questions and responses in text areas, and adding participants, locations, attachments, and other details.

Add evidence

Add evidence is a component that allows users to add evidence details, such as category, description, attachments, captured by, and location.

Assessment

The Assessment configuration feature enables the user to configure the SLA score against each response and interpretation based on the final score.

Conduct assessment enables the user to conduct assessment in any case as a local action and go through the process of completing the answers for the assessment questions, save and return to complete the assessment. Also, on completion view the score, interpretation of the assessment.

Assessment component can also be used as a step in any of the stages of a new case type.

Activity plan

An Activity Plan is a framework for tracking Goals and Tasks assigned to operators associated to an instance of a Case. The Activity plan component can be applied to various business use cases, including procurements, and investigation applications.

Activity plan configuration

Activity plan templates expedite the process of creating a new activity plan. The templates are pre-configured activity plans containing all the details required to implement the activity plan. Activity Plan templates may be used to construct reusable collections of goals and tasks. A reusable template may be associated with a Case, and its goals and tasks may be configured for the specific Case.

Activity plan configuration enables users to configure activity plan templates that consist of goals, tasks, and SLA definitions. The user's Activity plan edit accessibility helps the user to update the Goals and tasks and sequence them based on priorities using the SLA's. Also, the existing activity plans can be deactivated if the template is not required.

Activity plan template

An activity plan template Landing Page enables users to create activity plan templates with goals and tasks as a template which can be used for further processes. The users can edit the goals and tasks which can be further used in the investigation case type either by selecting the existing or creating a custom activity plan for the same. The users can also deactivate an Activity plan if the template is no more required. An activity plan so launched in the investigation case type can be appended with additional goals and tasks. This allows the users to add existing Goals or tasks, or custom create them.

Initiation and execution

The component provides support for initiating activity plans using existing templates or creating custom templates based on the use case. The component provides support for initiating a sequential plan or parallel plan as required. The system allows you to make necessary changes to the existing plan before initiation. It also provides the option to assign goals and tasks to individual users by selecting from the existing list of users or work queues. In the case of sequential plan, once a sequence is set, the goals and tasks within the plan will be created as per the sequence. The next task or goal will be assigned only after the previous one is resolved. This feature can be used by selecting the Sequential checkbox while creating an activity plan template or any custom activity plan case at run time.

Activity plans can be initiated for any of the existing cases through local and case-wide actions. The case owner can assign tasks and goals to team members or work queues, and the execution can be monitored as per the configuration. Once all the tasks and goals within an activity plan are complete, the plan will be resolved. The case owner can also resolve the activity plan by forced closure if it is not required or is invalid.

Activity plan usage

The Activity Plan Usage tab displays the list of plan templates that are used during creation of Activity plan case from Investigation or any other case. This tab also provides details on usage count, status of the plan and if the plan used is existing or custom. Users also have an option to convert custom plan to template.

Entity merge

Entity merge is a feature that enables the users to merge the data properties of potential duplicates of Person entity or Business entity and create a single Master record. The duplicate entities are marked as inactive and all the properties selected by the user are retained in the Master entity.

The properties that need to be displayed for merging can be pre-configured by the users from option provided under PGP configuration in App Studio.

Entity attachment for entities

The attachment component feature saves file and URL attachments as data items to the entities. It supports attaching multiple file types, such as Word, PDF, Excel, and so on. The features serve as tools to help manage critical attachments stored against any entity, such as person, business, facility, vehicle, and so on.

Mobile Offline features

Mobile Offline features such as conduct interview, evidence, case notes and completion of the tasks in activity plan can be completed on mobile in offline mode. The data gets synced with the case once the users are online again.

Internationalization

Internationalization enables a business architect or a supervisor user to configure the list of countries, the respective state or province labels that an application supports through a simple configuration. It also enables the phone number format validation for different countries.

Case report

A case report is a detailed report of the data that is captured in the case type. You can now generate a Report of Investigation in both PDF and Microsoft Word formats. You can also incorporate tabular data into a Report of Investigation.

Association management framework

An association is a relationship within entities and between entity and case. Consider an investigation involving a car accident. The accident is reported, and one person is injured. In this case, two person entities are associated with the case (incident), the car driver as the Subject and the injured person as a victim.

Pega Government Platform provides a generic association framework that allows you to associate objects to each other and manage all the associations that are linked to the entities in the system.

To represent such relationships, Pega Government Platform™ uses an association framework, which allows you to capture relationships between the following objects:

Entity to entity

Husband and wife or an owner of a business.

Below are the some of the entity-to-entity associations available in PGP.

- Person entity - Person to Business, Person to Facility, Person to Vehicle, Person to Item.
- Business entity - Business to Facility, Business to Vehicle, Business to Person, Business to Item

Case to case

Assessments or Events for an investigation

Below are some of the case-to-case associations available in PGP.

- Investigation case - Investigation to Subject, Investigation to Event, Investigation to Investigation Subject case – Subject to Event, Subject to Investigation, and so on.

Entity to case

Victim of an accident, beneficiary to a grant. Below are some of the entity to case associations available in PGP.

- Person - Person to Investigation, Item to Investigation, and so on.
- Vehicle - Vehicle to Subject, Business to Subject, and so on.

Case to entity

Subject of an investigation (person, business, vehicle, or facility). Below are the some of the case to entity associations available in PGP.

- Investigation case - Investigation to Business, Investigation to Vehicle, etc.
- Subject case - Subject to Person, Subject to Facility, Subject to Vehicle, etc.

Entity preview for association widgets

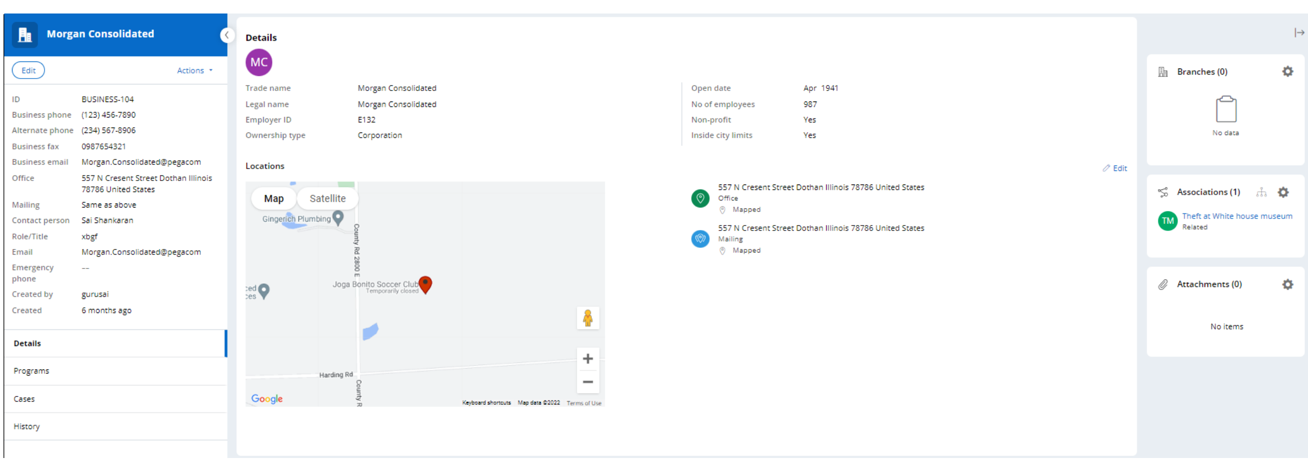
This feature enables a case worker to preview entities associated. This feature allows to quickly preview the content on a separate panel without opening it. This allows you to display the most important information, so users can navigate and manage their entities much more efficiently.

Entity profile views

Pega Government Platform provides enhanced profile views that contain comprehensive information about the entities like person entity, business entity, vehicle entity, household entity, facility entity, item entity, and their related cases as well as associations. The views are built of different widgets that allow the customer to remove, re- arrange or add more widgets in similar patterns.

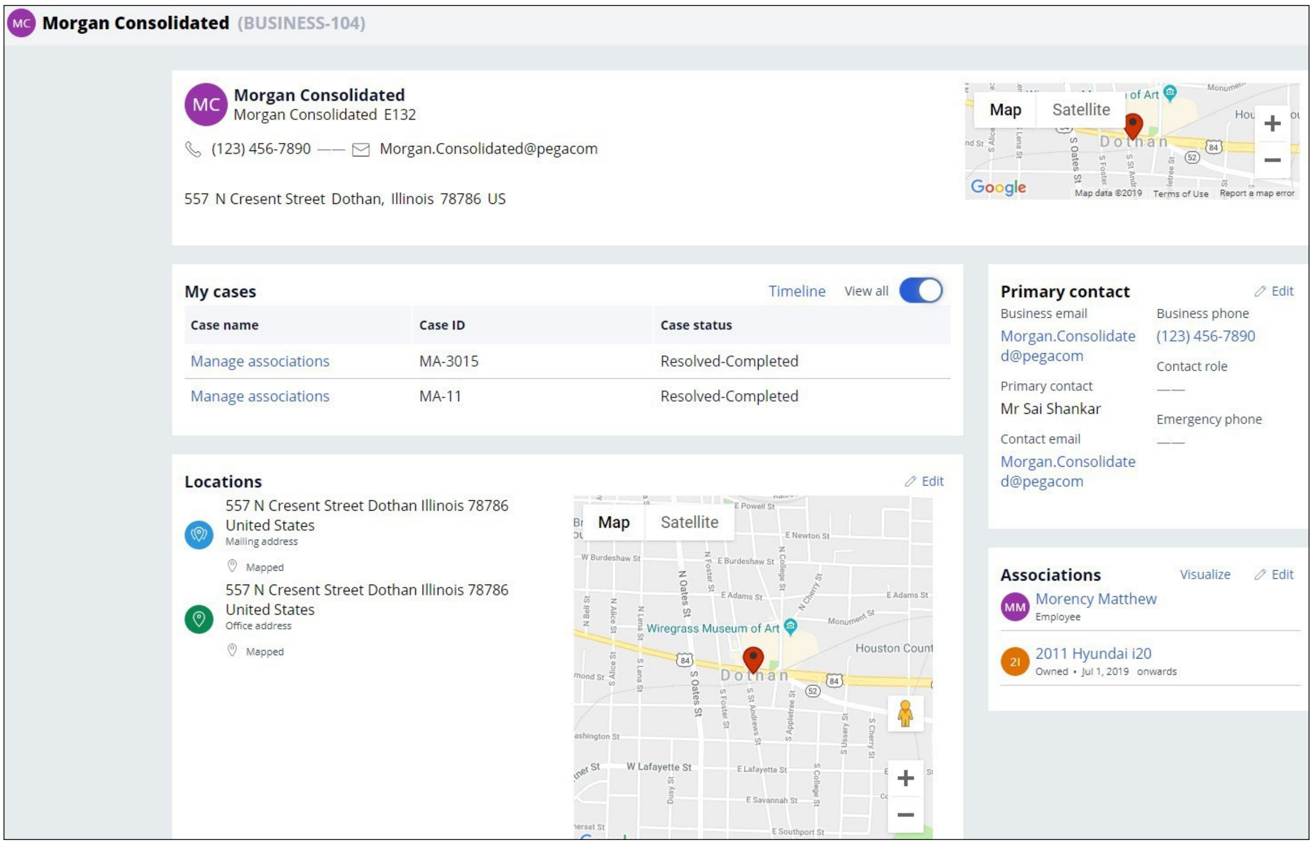
Enhanced person profile view

PPega Government Platform provides agencies with the ability to create, update, and view profiles for individual constituents in the form of editable widgets, which provide the ability to edit existing information. Each profile includes personal information, demographics, associations, employment, history, and communication details..



Enhanced Business profile view

Pega Government Platform provides the ability to create, view, and manage business entities and the details of their employees, branches, associations to constituent profiles, and communication details in the form of editable widgets.



Investigative case management

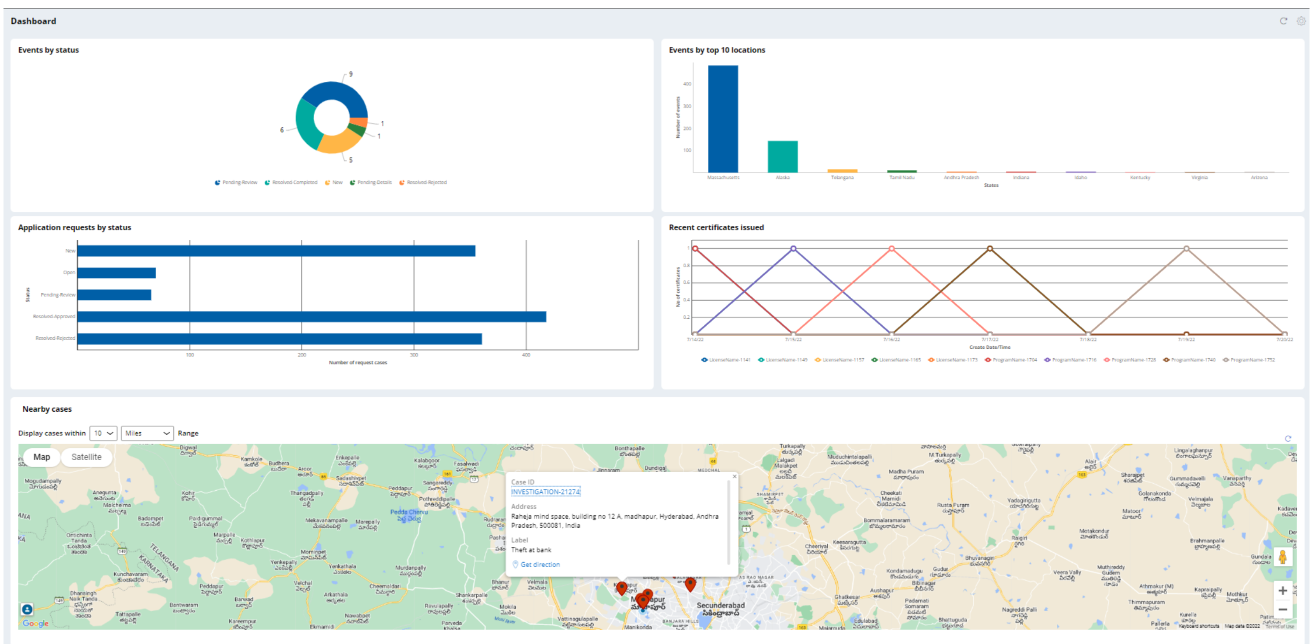
The Investigative Case Management (ICM) application has been built on Cosmos theme with the following enhancements:

- Event case has been converted to different stages and steps
- Investigation case has been converted to different stages and steps

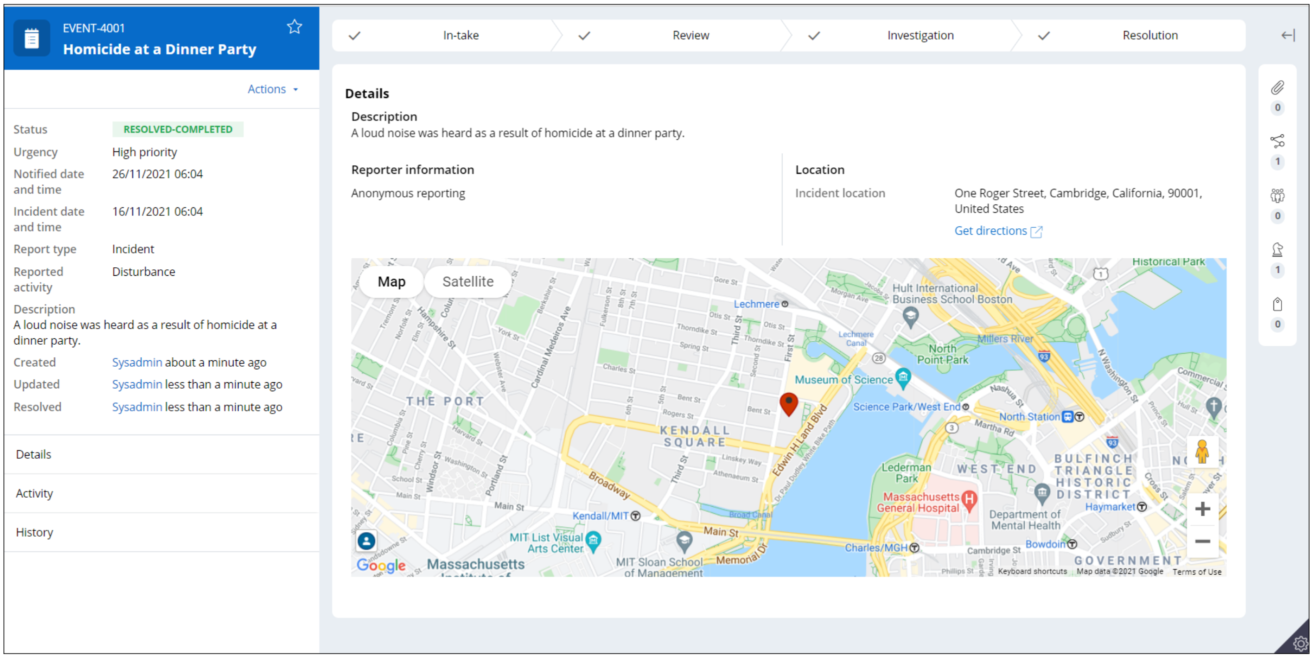
- In the Event case type, feature of identifying the potential duplicate/related events has been introduced
- In Event case type, for Child welfare event type, new field to capture child details has been introduced and it creates a new subject from event review and associates to the investigation case

As part of this release, custom access in the request access feature is not supported in Cosmos and will be taken as part of next release.

Enhanced view of ICM Application



Event Case view



Conduct Investigation

The Investigation case type provides end-to-end investigative case management abilities that enable agencies to increase the efficiency of the investigation's management and resolution process. The Investigation Case Management case type can be initiated as a standalone case type and also extends the Event case type. This event case type specializes in initiating an investigation case allows field investigators to accept ownership of the case and conduct the investigation.

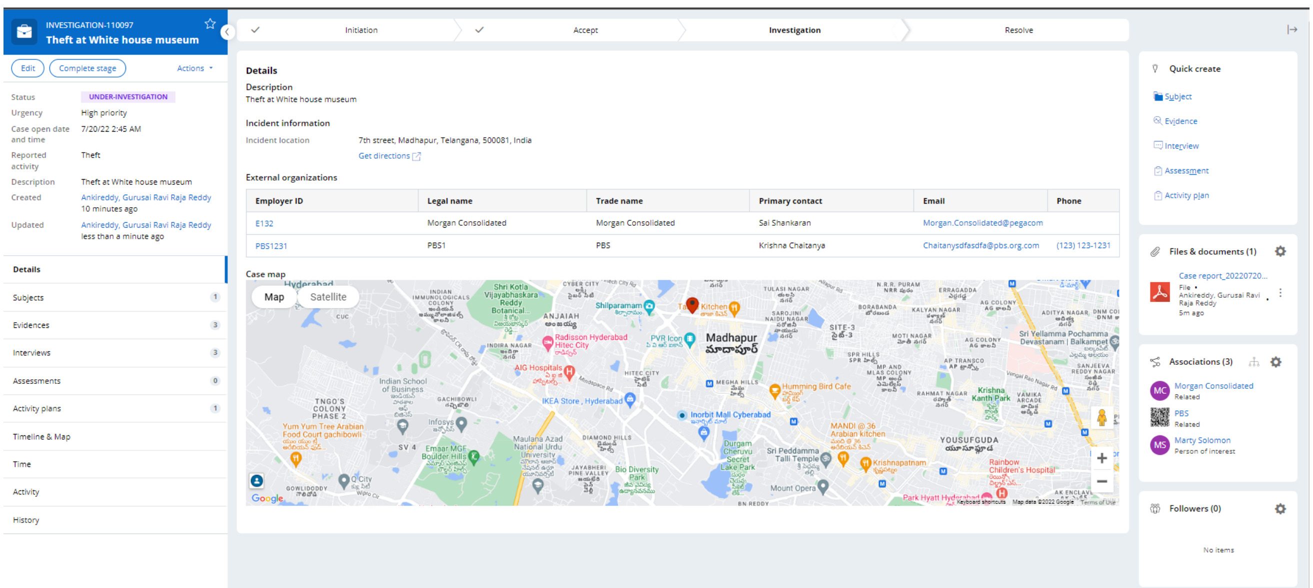
A field investigator can then conduct the investigation with many tools such as subjects, Interview, evidence, Activity Plan, Assessment to name a few. By using a quick-create utility designed for speedy data capture, field investigators can establish and update cases. The drag-and-drop abilities of Pega Government Platforms enable the association of entities and situations for better analysis and visualization.

The Investigation case type also allows the field investigator to generate a report at the end of the investigation. This allows the investigator to capture the data captured using different tools used to conduct investigation.

At the completion investigation case by captures details using different tools, the field investigator can complete the stage to review the checklist and change the status of the case accordingly.

The investigation case type provides user to log Time for the case and provides investigation owner, supervisor with time tab which gives a summary of time entry logs of the case.

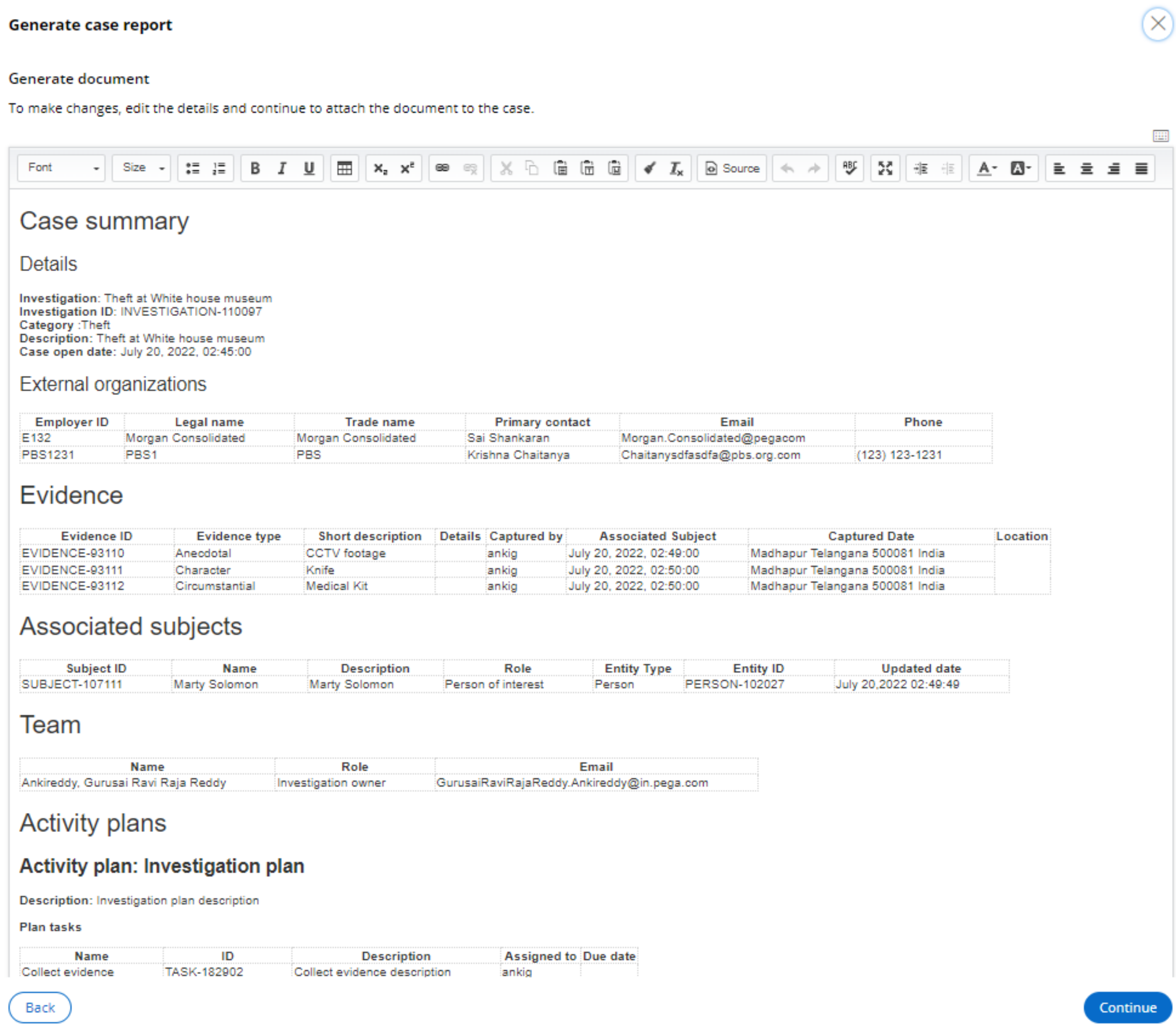
Investigation Case view



ICM Report of Investigation

The case report component enables you to generate a report of a case which contains the data that is captured using various other components that are available in the system. This helps you analyze the information from a single place.

You can generate a Report of Investigation in both PDF and Microsoft Word formats. You can display the data such as external organization, subject, evidence, and assessments from various sections in a tabular format. The ROI component is flexible, allowing you to choose to include the data such as external organization, evidence, subject, interviews, assessments, and digital signature from various sections to be a part of the end report.



Generate case report

Generate document

To make changes, edit the details and continue to attach the document to the case.

Font Size Source

Case summary

Details

Investigation: Theft at White house museum
Investigation ID: INVESTIGATION-110097
Category :Theft
Description: Theft at White house museum
Case open date: July 20, 2022, 02:45:00

External organizations

Employer ID	Legal name	Trade name	Primary contact	Email	Phone
E132	Morgan Consolidated	Morgan Consolidated	Sai Shankaran	Morgan.Consolidated@pegacom	
PBS1231	PBS1	PBS	Krishna Chaitanya	Chaitanysdfasdfa@pbs.org.com	(123) 123-1231

Evidence

Evidence ID	Evidence type	Short description	Details	Captured by	Associated Subject	Captured Date	Location
EVIDENCE-93110	Anecdotal	CCTV footage		ankig	July 20, 2022, 02:49:00	Madhapur Telangana 500081 India	
EVIDENCE-93111	Character	Knife		ankig	July 20, 2022, 02:50:00	Madhapur Telangana 500081 India	
EVIDENCE-93112	Circumstantial	Medical Kit		ankig	July 20, 2022, 02:50:00	Madhapur Telangana 500081 India	

Associated subjects

Subject ID	Name	Description	Role	Entity Type	Entity ID	Updated date
SUBJECT-107111	Marty Solomon	Marty Solomon	Person of interest	Person	PERSON-102027	July 20,2022 02:49:49

Team

Name	Role	Email
Ankireddy, Gurusai Ravi Raja Reddy	Investigation owner	GurusaiRaviRajaReddy.Ankireddy@in.pega.com

Activity plans

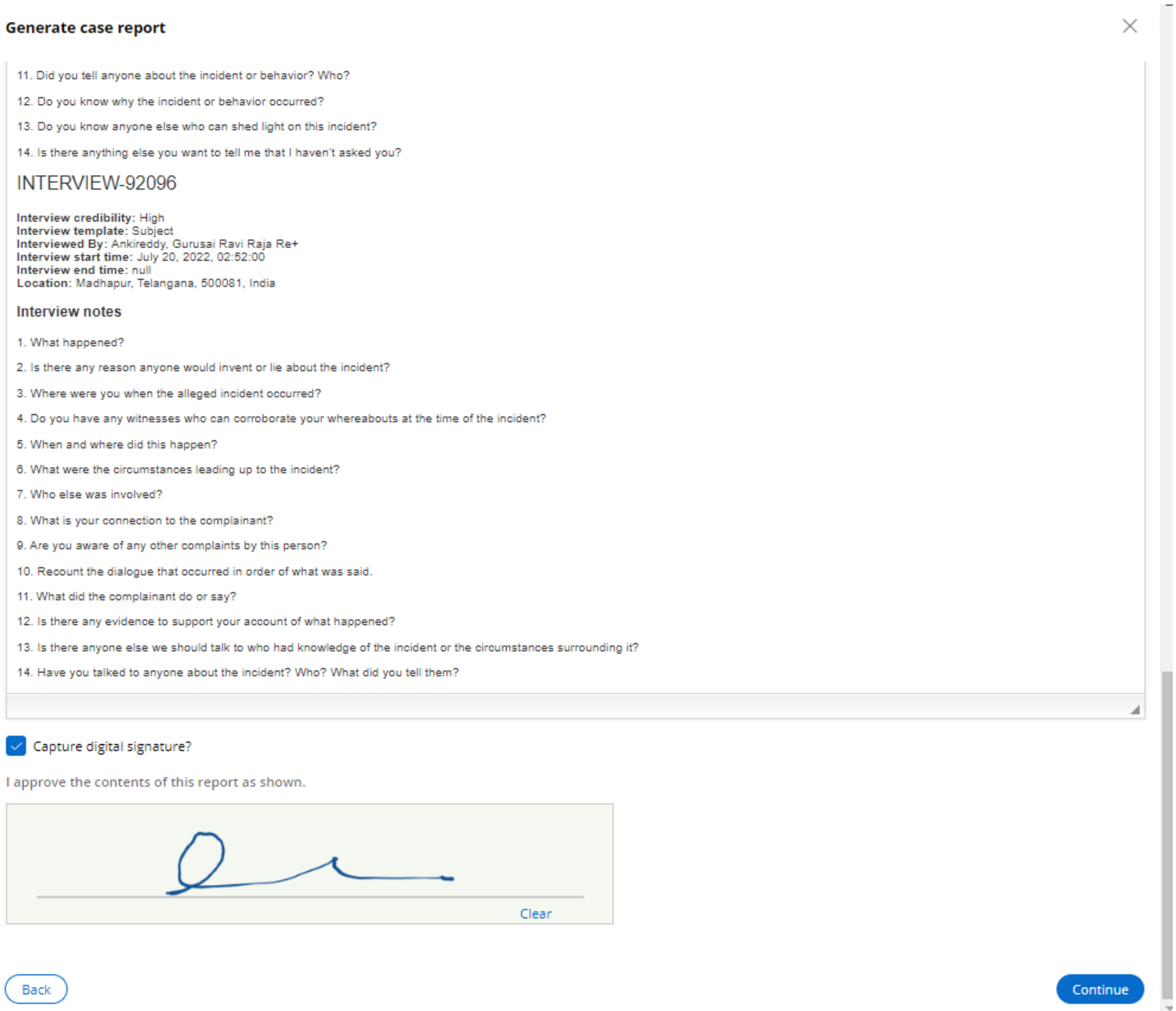
Activity plan: Investigation plan

Description: Investigation plan description

Plan tasks

Name	ID	Description	Assigned to	Due date
Collect evidence	TASK-182902	Collect evidence description	ankig	

Back Continue



Investigation report

Operator Case Involvement (Touch) Reporting

This feature enables the operators to create reports and expose them to supervisors. Each operator can view the touch point reports and view their course of work over the period of time. These reports are only restricted to the work done in the Investigation case type.

These reports allow you to monitor in real-time the efficiency and success. You can view how often an operator has worked on an investigation case type and how long it takes to complete the tasks on an average, for example, over the last year.

A supervisor can generate the following reports:

- A touch point report for the supervisors to view their work.
- A supervisor report for touch points of team for investigation to view the work done by the team members on the investigation case type.

Pega Government Platform case types and workflows

This section describes the standard cases that are included with Pega Government Platform and are available for selection within the New Application wizard when you create your Pega Government Platform application. Depending on your organization's needs, you may include all or a subset of these case types in your application.

- **Example case types**
- **Standard case types**

Example case types

Event case management

Pega Government Platform includes end-to-end event case management that enables organizations to improve the resolution process. It provides the following capabilities:

- Initiate events
- Review events
- Resolve events

Investigative case management

Pega Government Platform includes an end-to-end investigative case management application that enables organizations to improve the efficiency of the investigations management and resolution process by reducing paperwork and providing a digital platform. It provides the following capabilities:

- Event intake – enables the intake worker to capture event details and category, and to send it for review.
- Initiate investigation cases – enables the ICM agents and supervisors to initiate investigation cases through an event or standalone cases.
- Case acceptance through email – enables the ICM agents to accept the investigation cases directly through E-mail.
- Subjects case management – enables the ICM agents to create subjects, and to associate subjects to investigation cases or known entities.
- Conduct interviews – enables the ICM agents to conduct interviews on subjects and to add interviews to an investigation case.
- Capture evidence – enables the ICM agents to add evidence and capture all the details for an investigation case and associate it with subjects.
- Add case notes – enables the ICM agents to add case notes that are related to any investigation to the investigation case.
- Add activity plan – enables the ICM case owner to add an activity plan to an investigation case and assign tasks to the team members

- Create assessment – enables the ICM agents to conduct assessments for entities that are related to any investigation case.
- Quick creates – enables the ICM agents to create subjects and investigation cases on mobile and hand-held devices.
- Generate report of investigation – enables the agents and supervisors to generate a report of an investigation by selecting the contents to be included in the document.
- Team management – enables the ICM agents (case owners) to manage the team members for an investigation case.
- Manage associations – enables the agents and supervisors to manage all the associations that are related to an investigation case, subject case, event case, and entities.
- Persona based dashboards – ICM agents, supervisors, and intake specialists have specific dashboards that enable them to track events, investigations, team, work, and workload.

- Access management – enables the ICM agents to request read and write access, and to approve access as read, write, or custom access.
- Case and object visualizations – enables the view of all the associations in a visual representation, which gives a 360-degree view of all the tied objects.
- Audit trails and timeline views – enables the view of the activities in any case in a visual timeline view or list view.
- View of investigation case – enables the view of all details related to an investigation case in a 360- degree UI to get a complete picture of the case.
- Transfer ownership – Investigation owner can transfer ownership of an investigator to an office or an user based on the requirement. A user has the option to view the investigation details and can accept the ownership or reject it so that the investigation can retransfer the ownership to someone else.

Complaints management

Pega Government Platform includes an end-to-end complaints management application which is available only in UI Kit version. It provides the following capabilities:

- File complaints – enables constituents to create complaint cases and provide all related details.
- File anonymous complaints – enables constituents to file an anonymous complaint.
- Review complaints – enables managers to review the complaint cases and take necessary action.
- Persona based dashboards – Complaints workers and managers have specific dashboards that enable them to view complaint status, workload, team members, and work lists.

Procurements management

Pega Government Platform provides a case management-based application for managing the procurement process which is available only in UI kit version. It provides the following capabilities:

- Define specifications – enables the procurement officer to define specifications for the new procurement.
- Add marketing details – enables the market analyst to add and capture details for the marketing related to new procurement.
- Define advertisements – enables the procurement officer to define advertisement details for a procurement.
- Vendor bidding – enables the vendors to submit bids against the listed procurements.
- Multi-personnel evaluation – enables multiple levels of evaluation for the submitted bids.
- Award bid process – enables the supervisor to award a bid based on the evaluation score and system recommendation.
- Ask questions – enables the end users to submit questions.
- View answers – enables the end users to view the existing questions and answers on the portal.
- Persona based dashboards – Procurement officers, supervisors, and market analysts each have specific dashboards that enable them to view procurement status, team workload, team members, and work lists.

User registration

Constituents can register and obtain an online account through Pega Government Platform to access services provided by agencies without the need to come into an office or call the agency. After registering, users can manage their own operator ID and password. The user registration process utilizes Pega's authentication and authorization services, which you can integrate into your agency's security infrastructure.

Standard case types

Case Type	Description
Add person	Add details of a person entity and create a person entity in the system

Case Type	Description
Add business	Add details of a business entity and create a business entity in the system
Add facility	Add details of a facility entity and create a facility entity in the system
Add vehicle	Add details of a vehicle entity and create a vehicle entity in the system
Add household	Add details of a household entity and create a household entity in the system
Add evidence	Add details of evidence in the system
Add note	Add details of note in the system
Add activity plan	Create an activity plan case in the system
Activity plan template	Allows users to manage the activity plan template configurations
Add item	Add details of an item entity and create an item entity in the system
Application Request	A process to file an application. For entities, to request issue of a program or license
Conduct interview	Add details of interview case in the system
Goal	Create goal case in the system
Initiate event	Add information about an event and create a new event case in the system
Manage associations	Allows users to manage all the associations that are linked to the entities in the system
Initiate complaint	Add information about a complaint and create a new complaint in the system
Initiate procurement	Add information about a procurement and create a new procurement in the system

Case Type	Description
Initiate investigation	Add information about an investigation and create a new investigation in the system
Initiate subject	Add information about a subject and create a new subject in the system
Change password	Provides an option to change the existing password
Forgot password	Provide an option to retrieve a forgotten password
License	Add details of license and persist to the system
Program	Add details of program and persist it to the system
Question	Provide an option to the users to ask questions
Registration	Create and register new user account in the system
Transfer ownership	Provides a capability for transferring the case ownership to other users
Request access	Enables the users to request access to a case which is routed for approval
Merge Entity	Provide an option to merge the potential duplicates of Person Entity and/or Business Entity
Manage Branches	Manage the branches of business entity and save it to the system
Manage Education	Manage the education details linked to person entity and save it to the system

Case Type	Description
Manage Experience	Manage the experience details linked to person entity and save it to the system
Manage Location	Manage the location linked to any entity and save it to the system
Manage Training	Manage the training details linked to person entity and save it to the system
Manage household members	Manage the household members linked to household entity and save it to the system
Program definition	Provides capability for defining and managing programs
Program finder	Provides support for prescreening for the programs
Subject	Add details of a subject entity and persist it to the system
Search Person	Search a person entity in the system based on search criteria like id, name
Search Business	Search a business entity in the system based on search criteria like id, name
Search Household	Search a household entity in the system based on search criteria
Search Event	Search an event in the system based on search criteria like id, name
Search Facility	Search a facility entity in the system based on search criteria like id, name
Search Vehicle	Search a vehicle entity in the system based on search criteria like id, name

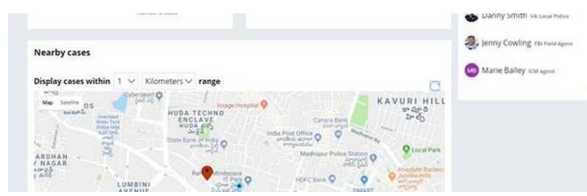
Case Type	Description
Search Complaint	Search a complaint in the system based on search criteria like id, name
Search Investigation	Search an investigation in the system based on search criteria like id, name
Search Procurement	Search a procurement in the system based on search criteria like id, name
Task	Create a task case in the system
Time entry	Add details of a Time entry such as time code, project code, reference id, hours, and so on and persist it to the system
Update person	Update the details of person entity and store in the system
Update business	Update the details of business entity and persist it to the system
Update facility	Update the details of facility entity and store in the system
Update item	Update the details of item entity and persist it to the system
Update vehicle	Update the details of vehicle entity and store in the system
Update household details	Update the details of household entity and store in the system
View person	View all the information of person profile in a 360-degree view
View business	View all the information of business profile in a 360-degree view

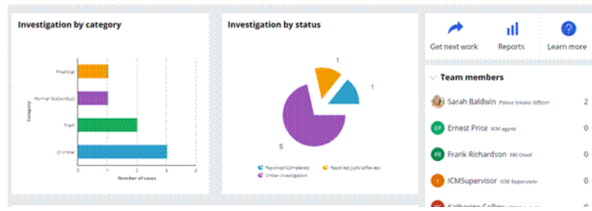
Case Type	Description
View household	View all the information of household entity in the system
View item	View all the information of item profile in a 360-degree view .
View vehicle	View all the information of a vehicle entity in the system
View facility	View all the information of a facility entity in the system
View complaint	View all the information of a complaint in the system
View investigation	View all the information of an investigation in the system
View procurement	View all the information of a procurement in the system

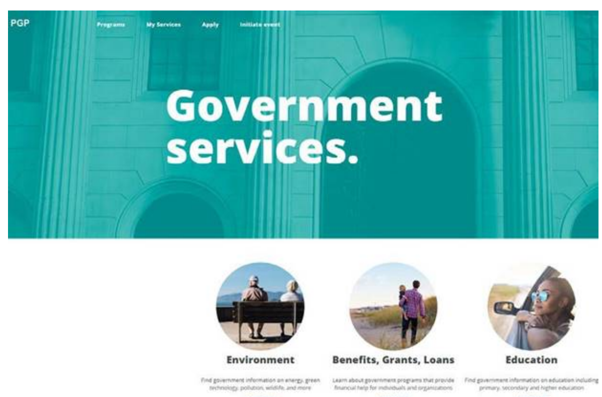
Roles, portals, and dashboards in Pega Government Platform

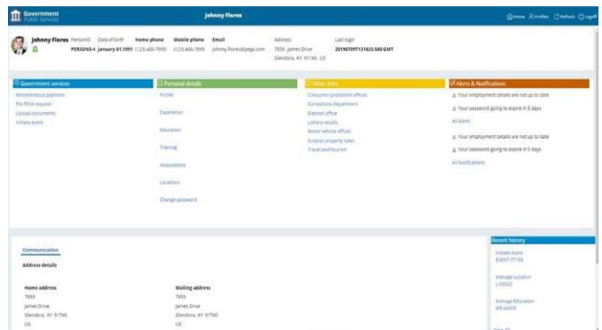
Pega Government Platform supports key roles associated with your day-to-day use of the application. The table below describes the key access roles provided with the Pega Government Platform.

Role name	Description
PGP User	Pega Government Platform users can view urgent work, add new entities to the system, manage the entity information, and view reports from the PGP Case worker dashboard via the Pega manager portal.

Role name	Description
PGP Manager	The manager views urgent work, and reviews and approves workbasket items from the PGP manager dashboard which serves as a generic portal for any apps built on top of PGP. The manager also has an ability to configure assessments.
Intake specialist	The intake specialist creates events based on reported information and views reports about events intake. They use the templates of the PGP Case worker dashboard and Pega manager portal with reports specific to intake.
ICM agent	The ICM agent works on the investigation cases as the investigator or investigator analyst and uses the templates of the PGP Case worker dashboard and Pega manager portal with reports specific to investigations. 
ICM supervisor	The ICM supervisor reviews events and assigns work to the ICM agents and uses the templates of the PGP Manager dashboard and Pega manager portal with reports specific to investigation case summaries.

Role name	Description
	Supervisor also has an ability to configure assessments. 
Procurement Officer	The procurement officer creates the procurement plan, enters advertising details, and answers vendor questions about the procurement. They use the templates of the PGP case worker dashboard and Pega manager portal with reports specific to procurements cases.
Procurement Specialist	The procurement specialist enters specifications and evaluation criteria for the procurement and reviews the procurement. They use the templates of the PGP Manager dashboard and Pega manager portal with reports specific to procurements cases.
Procurement Supervisor	The procurement supervisor reviews the procurement plan details and approves/ rejects them. They use the templates of the PGP Manager dashboard and Pega manager portal with reports specific to procurements cases.
Market Analyst	The market analyst enters market analysis details about the procurement using the

Role name	Description
	templates of the PGP Case worker dashboard and Pega manager portal.
Procurement Manager	The procurement manager awards the procurement and oversees the work of the entire team using the templates of the PGP Manager dashboard and Pega manager portal.
Vendor	The vendor submits bids against a procurement. Vendors use the self-service portal.
Complaints User	The complaints user can file a complaint from their self-service portal as a constituent. 
Complaints Manager	The complaints manager reviews filed complaints and takes further action as well as coordinates work for his or her team. They will use the templates of the PGP Manager dashboard and Pega manager portal.

Role name	Description
PGP End User	The PGP end user can view and manage personal details like experience, education, associations, training, address. They can also initiate events from the self-service portal. 

Primary data entities

This section describes the data types that are used by Pega Government Platform, stored in external systems or, where appropriate, internally to the Pega system.

Name	Description	System of record (SOR)
Address	Contains information pertaining to the address details of a person, business, facility, vehicle, household, and associate.	Pega
Association	Contains information pertaining to managing all associations.	Pega
Assessment	Contains information pertaining to the	Pega

Name	Description	System of record (SOR)
	configurations and creation of assessment	
Checklist Map	Contains information pertaining to the checklist items to be reviewed for various applications.	Pega
Communication	Contains information pertaining to communication details, such as email, fax, phone, social network, and websites.	Pega
Complaint	Contains attributes and information pertaining to complaints filed by constituents or businesses.	Pega
Configuration	Contains information pertaining to the configurations of an address, country, state, authorization, and communication type.	Pega
Document	Contains information pertaining to the document intake and its verification	Pega

Name	Description	System of record (SOR)
Education	Contains information pertaining to the education details of a person.	Pega
Entity	Contains data pertaining to a business, associate, person, vehicle, facility, household, item, and place.	Pega
Experience	Contains information pertaining to the experience details of a person.	Pega
Evaluation Criteria	Contains information pertaining to the evaluation criteria and evaluation scores for different applications.	Pega
Event	Contains information pertaining to an event or an incident.	Pega
Evidence	Contains information pertaining to evidence.	Pega
Goal	Contains information pertaining to goal.	Pega
Identifier	Contains information pertaining to identifiers such as passport, driver license, SSN, or national ID.	Pega

Name	Description	System of record (SOR)
Interview	Contains information pertaining to an interview.	Pega
Investigation	Contains information pertaining to an investigation.	Pega
License config	Contains information pertaining to license configuration	Pega
Link	Contains information pertaining to rules related to linked data objects.	Pega
Note	Contains information pertaining to case notes.	Pega
Plan	Contains information pertaining to activity plan	Pega
Portal	Contains information pertaining to the details to be displayed on the portal based on the entity type (Person or Business) and business requirement.	Pega
Procurement	Contains attributes and information pertaining to procurements.	Pega
Program Config	Contains information pertaining to program configuration	Pega

Name	Description	System of record (SOR)
Project code	Contains information pertaining to project code	Pega
Question	Contains information pertaining to questions submitted by end users.	Pega
Subject	Contains information pertaining to a subject.	Pega
Task	Contains information pertaining to task	Pega
Training	Contains information pertaining to the training details of a person.	Pega
Time code	Contains information pertaining to time code.	Pega
Time entry log	Contains information pertaining to time entry log submitted by users.	Pega

Time management

Capture and track daily employee time against time codes and projects. The Time Management application is a low-code solution that helps in tracking and reporting time for users as per applicable standards and guidelines.

- **Time entry**
- **Manage time**
- **Roles in Time management**

Time entry

This case type provides users with a process to log time with details like project code, time code, reference id (case id), hours, and so on. These logs are reviewed by the team manager in the review step.

The Time Management feature supports cascading approval for time entries. You can control the routing of approvals based on the configuration of the time management project.

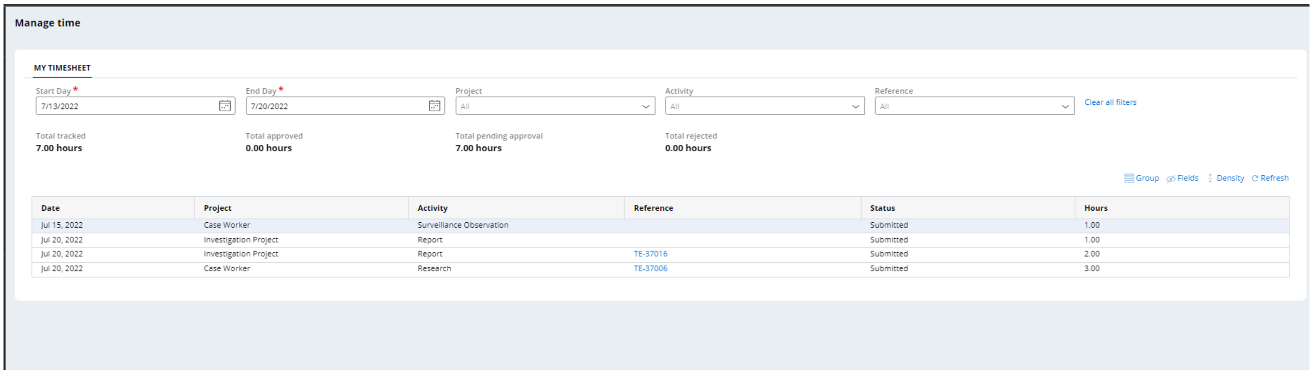
Based on the selected approvals for a project in data records, Time entry is routed to different levels of approvals accordingly. If all the routing paths are enabled the approval action goes first to the Work Group Manager, then to the Time Code Approval, and to the Project owner Approval.

If a user is logged into time for the first time (on the current day), they can copy the projects, activities, and references by selecting the latest entry check box. This action will copy the latest submitted time logs to the present-day logs.

A Touch point report that lists the cases along with their description is provided to the users when an action is performed.

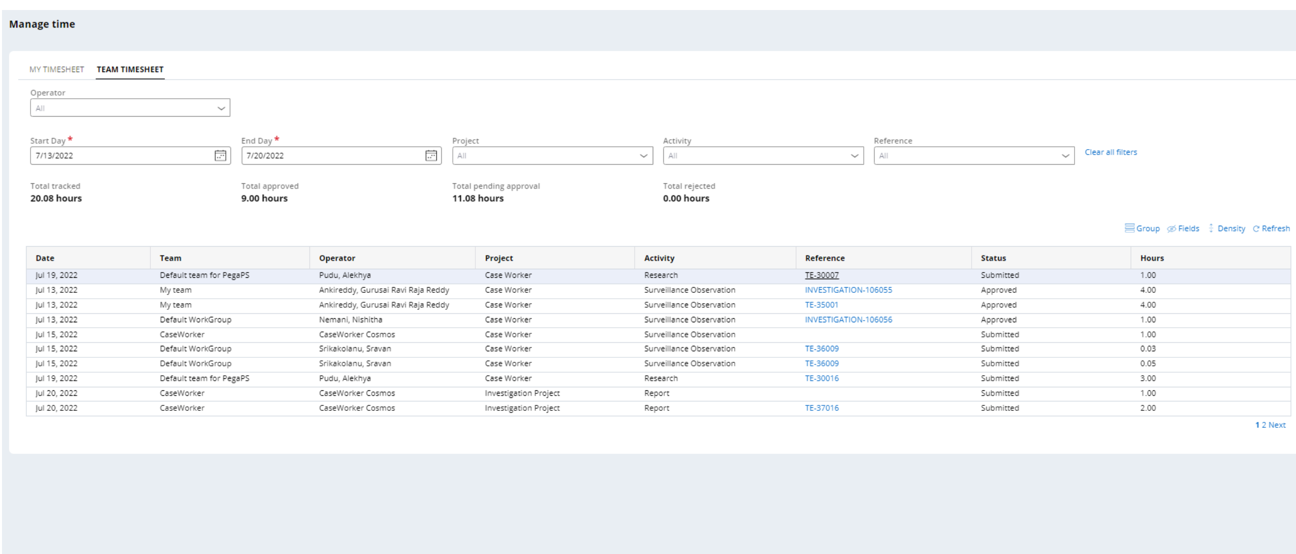
Manage time

In My Timesheet users can search for time entry logs with search criteria such as start day, end day, project, activity, and reference. The reference id is provided as a link with which users can view the case for which they have logged time.



Manage Time - My Timesheet

Team managers are provided with **Team Timesheet** along with **My Timesheet.** In Team Time sheet, managers can view the logs of team members all together or view the logs of specific team member with **Operator** search criteria.



Manage time entry - Team timesheet

Roles in Time management

Time management supports key roles associated with your day-to-day use of the application. The following table lists the key access roles with their descriptions.

Role name	Description
User	Users can log time entries and view their own logs. Managers can view their team's entry logs (if they managing any teams) along with their own logs.
Admin	Admin has access to view the time entries of all the users .

Further reading

Get more information about Pega Government Platform.

For more information about Pega Government Platform, see https://docs.pega.com/bundle/pega-government-platform/page/pega-government-platform/hub/government-platform-get-started.html.

Install

- **Completing the prerequisite tasks**
- **Backing up your system**
- **Installing the application**

Completing the prerequisite tasks

Before you Install your application, ensure that you complete all of the following tasks.

1. Consult with your database administrator to determine whether the installation process can make automatic changes to the database schema. Alternatively, the database administrator may need to manually apply the DDL files that include schema changes.
2. Install the latest version of Pega Platform '23, and ensure that you can log in as an administrator. For more information, see the *Pega Platform Install Guide* for your environment on the Deploy Pega Platform page.

   Patch releases are available through Pega's standard software delivery process. You can request software through Pega Software Distribution or by contacting GCS.

3. Apply any required hotfixes by using the Hotfix Manager. For more information, see Applying hotfixes. To review the Pega Government Platform hotfixes without using the Hotfix Manager, see the Pega Government Platform Hotfix page.

Backing up your system

When installing or updating an application, back up your system after each step to ensure that you can revert to the last working version of the system if you encounter an issue.

Note: The deployment process modifies both the data schema and the rules schema. Use a backup procedure that preserves both schemas.

1. Verify that all rules are checked in.
2. Shut down the Pega Platform™ application server.
3. Use your database utilities to complete an offline backup of the Pega database.
4. Back up the configuration and environment files.
   If you edited any of the following Pega Platform configuration files in the `APP-INF\classes` directory of an EAR deployment, or the `WEB-INF\classes` directory of a WAR deployment, include these files in the backup:
   - `prbootstrap.properties`
   - `prconfig.xml`
   - logging file: `prlogging.xml` or `prlog4j2.xml`
   - `web.xml`
   - `pegarules.keyring` or any other `.keyring` files
5. Back up any third-party or custom JAR files that you installed.
   Redeploying the Pega Platform applications might delete these files from your application server.

Installing the application

To install Pega Government Platform, import the application file, and then complete the additional procedures outlined.

Before you begin:

Ensure that you complete the prerequisites for this application installation.

- **Importing the modularized application file**
- **Creating a system administrator operator**

- **Creating operator accounts**
- **Updating event listeners**
- **Optional: Importing the sample data**
- **Optional: Enabling sample operator accounts**
- **Optional: Installing sample application**

Importing the modularized application file

The system data and rulesets for Pega Government Platform are loaded during this task.

1. Log in to (`https://`*<hostname>*`:`*<port>*`/prweb`) by entering the administrator ID, for example, `administrator@pega.com` and the password that you used during installation.
2. In the header of Dev Studio, click Configure > Application > Distribution > Import.
3. Select the **/Rules/PegaGP.jar** file from your distribution media, and then follow the wizard instructions.
4. For schema changes, depending on your site's requirements, select either Automatic or Manual, and then continue following the wizard instructions.
   If you select Manual, see Viewing and applying schema changes.
5. On the Aged Updates screen, select the Import aged updates check box, and then click Next.
6. When the import is complete, click Done.
7. Apply the required hotfixes by using Hotfix Manager. For more information about applying hotfixes, see Applying the latest on-premises patch.
8. **Optional:** Verify the application rules.
   a. In the navigation pane of , click Records > Application Definition > Application.
   b. Confirm that the following application rule is displayed in the list:
      - *PegaGPCosmos 8*

- *PGPICMCosmos 8*
- *TimeMgmt 8*
- *PegaGP 8*
- *PGPICM 8*
- *PGPContracts 8*
- *PGPComplaints 8*

Creating a system administrator operator

Create a system administrator operator for Pega Government Platform by completing the following steps:

1. Log in to (`https://`*<hostname>*`:`*<port>*`/prweb`) by entering the administrator ID, for example, `administrator@pega.com` and the password that you used during installation.
2. In the header of Dev Studio, click **Create** > **Organization** > **Operator ID**.
3. Enter a short description, for example, pgpsysadmin, and then click **Create and open**.
4. In the Application Access section, enter the access group `PegaGPCosmos:Administrators`.
5. Click the **Work** tab. Under Organizational unit, click **Update**.
6. Click **PGPGov** > **Government** > **Operations**, and then click **Submit**.
7. On the **Security** tab, click **Update password**, enter a new password, and then click **Submit**.
8. Click **Save** to save the rule.

Creating operator accounts

If DWA (Directed Web Access) and Listener functionality are used in your application, make sure that the following operators are available in the environment.

OperatorID	Access Group	Team	Starting activity
ICMEventListener	PGPICMCosmos:ICMIntakeSpecialist	IntakeSpecialist	Data-Portal.ShowDesktop
PGPEventListener	PegaGPCosmos:CaseWorker	default@PegaPS	Data-Portal.ShowDesktop
RequestAccessEmailApproval	PGPICMCosmos:Administrator	default@PegaPS	Data-Portal.ShowDesktop
ICMInvestigationListener	PGPICMCosmos:Administrator	default@PegaPS	Data-Portal.ShowDesktop

For UI Kit apps: For applications built on UI Kit.

OperatorID	Access Group	Work Group	Starting activity
ExternalUserPGP	PegaGP:Caseworker	Default	Data-Portal.ShowDesktop
ExternalUserComp	PegaGP:ComplaintsWorker	Default	Data-Portal.ShowDesktop
ExternalUserICM	PegaGP:ICMAgent	Default	Data-Portal.ShowDesktop
ExternalUserProc	PegaGP:ProcurementsWorker	Default	Data-Portal.ShowDesktop
ICMInvestigationListener	PegaGP:ICMAdmin	default@PegaPS	Data-Portal.ShowDesktop

If operators are not available, follow these steps to create operators from the above tables in your Pega Government Platform application.

1. Log in to Pega Platform by using the administrator credentials, and switch to the respective applications and create the corresponding operators listed above.
2. In the header of Dev Studio, click **Create** > **Organization** > **Operator ID**.
3. Enter the Operator ID from the corresponding column in the Operators table and click **Create and open**.
4. Add the Access group from the corresponding column in the Operators table.
5. Click the **Work** tab. Under Organizational unit, click **Update**.
6. Click **PGPGov** > **Government** > **Operations**, and then click **Submit**.
7. Add the Work group from the corresponding column in the Operators table.
8. On the **Security** tab, add the starting activity to execute from the corresponding column in the Operators table.
9. Click **Update password**, enter a new password, and then click **Submit**.
10. Click **Save** to save the rule.

Updating event listeners

Pega Government Platform has a set of event listeners.

To update these listeners with requestor login credentials, complete the following steps.

1. In the header of Dev Studio, click **Configure** > **Integration** > **Email** > **Email Listeners**.
2. Click the *PGPEventEmailListener* listener name.
3. On the Email listener page, navigate to the Requestor login section and update the password of *PGPEventListener*, which was created in Creating operator accounts.
4. Save the record.
5. Repeat the previous steps for the following event listeners:
   - ICMEventEmailListener
   - RequestAccessApproval
   - InvestigationAcceptEmailListener

Optional: Importing the sample data

The distribution media includes sample data to help you explore the application capabilities. The sample data includes disabled sample operators that you can enable to learn about the workspaces for each operator role. Importing the sample data is optional, and the sample data that is provided might not align with your business needs.

> **Before you begin:**
>
> Ensure that you have already imported the application file.

To import the sample data for Pega Government Platform, complete the following steps.

1. In the header of Dev Studio, click Configure > Application > Distribution > Import.
2. Select the /SampleData/PegaGP_SampleData.jar file from your distribution media.
3. Follow the wizard instructions to import the sample data.

Optional: Enabling sample operator accounts

If you imported the sample data, operators are included that allow you to access the sample data. For security purposes, sample operators are disabled by default.

To enable the sample operators, complete the following steps.

1. In the header of Dev Studio, click Configure > Org & Security > Authentication > Operator Access.
2. In the Disabled operator's section, select the check box next to the operator ID to enable.
3. Click Enable selected.
   The **Enable Operator** dialog is displayed.
4. Click Submit to confirm that you want to enable the selected operator ID.
5. Click OK to close the dialog box.

Optional: Installing sample application

Pega Government Platform includes three sample applications within the distribution media such as ICM Demo, PGP Demo, and Grants.

To install the sample application, complete the following steps:

1. In the header of Dev Studio, click **Configure** > **Application** > **Distribution** > **Import**.
2. Select the `/OptionalComponents/PegaGP_Sample_App.jar` file from your distribution media, and then follow the wizard instructions.
3. When the import is complete, click **Done**.

Update

- **Completing the prerequisite tasks**
- **Backing up your system**
- **Updating the application**

Completing the prerequisite tasks

Before you Update your application, ensure that you complete all of the following tasks.

1. Consult with your database administrator to determine whether the update process can make automatic changes to the database schema. Alternatively, the database administrator may need to manually apply the DDL files that include schema changes.
2. Update to the latest version of Pega Platform '23, and ensure that you can log in as an administrator. For more information, see the *Pega Platform Update Guide* for your environment on the Deploy Pega Platform page.

   Patch releases are available through Pega's standard software delivery process. You can request software through Pega Software Distribution or by contacting GCS.

3. Apply any required hotfixes by using the Hotfix Manager. For more information, see Applying hotfixes. To review the Pega Government Platform hotfixes without using the Hotfix Manager, see the Pega Government Platform Hotfix page.

Backing up your system

When installing or updating an application, back up your system after each step to ensure that you can revert to the last working version of the system if you encounter an issue.

Important: Importing the new version of the application can require the execution of column and declare-index population jobs. These jobs run in the background, populating the new columns and declare-indexes that are imported with the application, which requires the update of a large number of records. In PostgreSQL installations, this large-scale update of records can require additional temporary disk space, so ensure that there is enough disk space available for the database to expand accordingly.

Note: The deployment process modifies both the data schema and the rules schema. Use a backup procedure that preserves both schemas.

1. Verify that all rules are checked in.
2. Shut down the Pega Platform™ application server.
3. Use your database utilities to complete an offline backup of the Pega database.
4. Back up the configuration and environment files.
   If you edited any of the following Pega Platform configuration files in the `APP-INF\classes` directory of an EAR deployment, or the `WEB-INF\classes` directory of a WAR deployment, include these files in the backup:
   - `prbootstrap.properties`
   - `prconfig.xml`
   - logging file: `prlogging.xml` or `prlog4j2.xml`
   - `web.xml`
   - `pegarules.keyring` or any other `.keyring` files
5. Back up any third-party or custom JAR files that you installed.
   Redeploying the Pega Platform applications might delete these files from your application server.

Updating the application

To update Pega Government Platform, import the application file, and then complete the additional procedures outlined.

Before you begin:

Ensure that you complete the prerequisites for this application update.

- **Importing the modularized application file**
- **Creating operator accounts**
- **Optional: Importing the sample data**
- **Updating data from integration layer to data layer**
- **App Studio compliance changes**
- **Extending new case types in implementation layer**
- **Modifying class context data transform rule**
- **Modifying business context data transform rule**
- **Enabling operator creation in user registration functionality**
- **Optimized properties**
- **Elasticsearch**
- **Performance mode**
- **Event life cycle changes in Pega Government Platform**
- **IACAuthentication service**
- **IACAuthentication activity**

- **Changes to entity search data pages in Pega Government Platform**
- **Updating case edit actions**
- **Changes to Registration.js**
- **Changes to Unique ID generation**
- **Queue processor for sending emails**
- **Security policies for password validation in user registration**
- **History and Field audit for entities**
- **Skip entity persistence in entity flows**
- **New declare indexes**
- **Changes to VIS.JS**
- **Activity plan life cycle changes**
- **Backward compatibility for Program configuration**
- **Time management lifecycle changes**
- **Moving countries and states**

Importing the modularized application file

The system data and rulesets for Pega Government Platform are loaded during this task.

1. Log in to (`https://`*<hostname>*`:`*<port>*`/prweb`) by entering the administrator ID, for example, `administrator@pega.com` and the password that you used during installation.
2. In the header of Dev Studio, click **Configure** > **Application** > **Distribution** > **Import**.

3. Select the **/Rules/PegaGP.jar** file from your distribution media, and then follow the wizard instructions.
4. For schema changes, depending on your site's requirements, select either Automatic or Manual, and then continue following the wizard instructions.
   If you select Manual, see Viewing and applying schema changes.
5. On the Aged Updates screen, select the Import aged updates check box, and then click Next.
6. When the import is complete, click Done.
7. Apply the required hotfixes by using Hotfix Manager. For more information about applying hotfixes, see Applying the latest on-premises patch.
8. **Optional:** Verify the application rules.
   a. In the navigation pane of , click Records > Application Definition > Application.
   b. Confirm that the following application rule is displayed in the list:
      - *PegaGPCosmos 8*
      - *PGPICMCosmos 8*
      - *TimeMgmt 8*
      - *PegaGP 8*
      - *PGPICM 8*
      - *PGPContracts 8*
      - *PGPComplaints 8*

Creating operator accounts

If DWA (Directed Web Access) and Listener functionality are used in your application, make sure that the following operators are available in the environment.

For UI Kit apps: For applications built on UI Kit.

OperatorID	Access Group	Work Group	Starting activity
ExternalUserPGP	PegaGP:Caseworker	Default	Data-Portal.ShowDesktop

OperatorID	Access Group	Work Group	Starting activity
ExternalUserComp	PegaGP:ComplaintsWorker	Default	Data-Portal.ShowDesktop
ExternalUserICM	PegaGP:ICMAgent	Default	Data-Portal.ShowDesktop
ExternalUserProc	PegaGP:ProcurementsWorker	Default	Data-Portal.ShowDesktop
ICMInvestigationListener	PegaGP:ICMAdmin	default@PegaPS	Data-Portal.ShowDesktop

For Theme Cosmos apps: For applications built on Theme Cosmos.

OperatorID	Access Group	Work Group	Starting activity
ICMInvestigationListener	PGPICMTheme-Cosmos:Administrator	default@PegaPS	Data-Portal.ShowDesktop

If operators are not available, follow these steps to create operators from the above tables in your Pega Government Platform application.

1. Log in to Pega Platform by using the administrator credentials, and switch to the respective applications and create the corresponding operators listed above.
2. In the header of Dev Studio, click **Create** > **Organization** > **Operator ID**.
3. Enter the Operator ID from the corresponding column in the Operators table and click **Create and open**.
4. Add the Access group from the corresponding column in the Operators table.
5. Click the **Work** tab. Under Organizational unit, click **Update**.
6. Click **PGPGov** > **Government** > **Operations**, and then click **Submit**.
7. Add the Work group from the corresponding column in the Operators table.
8. On the **Security** tab, add the starting activity to execute from the corresponding column in the Operators table.
9. Click **Update password**, enter a new password, and then click **Submit**.

10. Click **Save** to save the rule.

Optional: Importing the sample data

The distribution media includes sample data to help you explore the application capabilities. The sample data includes disabled sample operators that you can enable to learn about the workspaces for each operator role. Importing the sample data is optional, and the sample data that is provided might not align with your business needs.

> **Before you begin:**
>
> Ensure that you have already imported the application file.

To import the sample data for Pega Government Platform, complete the following steps.

1. In the header of Dev Studio, click **Configure** > **Application** > **Distribution** > **Import**.
2. Select the /SampleData/PegaGP_SampleData.jar file from your distribution media.
3. Follow the wizard instructions to import the sample data.

Updating data from integration layer to data layer

The Pega Government Platform integration layer has been refactored in the 8.3 release. All tables are now mapped to their respective classes in the data layer. Refactoring activities are provided for each of the applications that are shipped and for each class that is refactored.

To ensure a successful update of your application from Pega Government Platform 8.2 and earlier, review the topics in this section.

- **Optional: Enabling backward compatibility with integration layer**
- **Refactoring wrapper activities**

- Adding properties to integration and data layers
- Customizing report definitions in implementation layer
- Customizing data pages in implementation layer
- Customizing data page response data transforms in implementation layer
- Adding classes to communications and identifiers in implementation layer
- Modifying State drop-down menu source
- Modifying Country drop-down menu source
- State label configuration

Optional: Enabling backward compatibility with integration layer

By default, Pega Government Platform 8.3 only works with the data layer. For backward compatibility purposes, you can update two dynamic system settings to enable Pega Government Platform to point back to the integration layer.

> **CAUTION:** Do not use the integration layer with data tables as a source.

- *PGP/MasterDataIntegrationRefactor* – to point the Pega Government Platform master data, such as AddressTypes, CommTypes, and so on to the integration layer, change this value to `false`
- *PGP/IntegrationRefactor* – to point the Pega Government Platform non-master data, such as entities, addresses, and so on to the integration layer, change this value to `false`

Refactoring wrapper activities

For backward compatibility, Pega Government Platform provides an option to resave instances of integration classes as instances of data classes. To perform this refactoring, a few wrapping activities are available. The following table lists the refactoring wrapper activities that are provided for each application. Each activity invokes the refactoring activities of specific classes.

> **Note:** Before executing the activities, be sure that you have admin operators for each application pointing to the access group that is specified in the table.

To run the activities, launch the application that is specified in the table and access the respective rulesets from the production rulesets of the access group.

Application	Activity	Ruleset	Access group	Description
PGPICM	PegaPS.Refactor_IntToData	*PegaPSRefactoring:08-03-01*	PegaGP:ICMAdmin	Refactors the Int classes for the PGP and ICM applications
PGPICM	PegaPS.RefactorMasterInfo_IntToData	*PegaPSRefactoring:08-03-01*	PegaGP:ICMAdmin	Refactors the master Int classes for the

Application	Activity	Ruleset	Access group	Description
				PGP and ICM applications
PGPComplaints	PegaPS.RefactorMasterInfo_IntToData	*PegaPSComplaintsRefactoring:08-03-01*	PegaGP:ComplaintsAdmin	Refactors the master Int classes for the Complaints application
PGPContracts	PegaPS.RefactorMasterProcInfo_IntToData	*PegaPSProcurementsRefactoring:08-03-01*	PegaGP:ProcurementsAdmin	Refactors the master Int classes for the Procurement application

After running the wrapper activities, clear all the node level data pages in all the applications.

Adding properties to integration and data layers

When adding properties to the integration and data layers in the Pega Government Platform implementation layer, before executing the activities listed in Refactoring wrapper activities, update the mappings in the *Refactor_CopyIntToData* data transform, which is specific to the respective data class.

Customizing report definitions in implementation layer

When a report definition from an integration class is specialized into the Pega Government Platform implementation layer, perform the same changes to the corresponding report definition of the data layer class.

> **For example:**
>
> For example: if any changes are made to the PersonList report definition (*PegaPS-Int-Entity-Person*), perform the same changes to the PersonList (*PegaPS-Data-Entity-Person*) report definition in the implementation layer-specific ruleset.

Customizing data pages in implementation layer

When data pages are customized in the Pega Government Platform implementation layer, update the same data page with another data source that retrieves the data from the data layer with data layer-specific report definitions and response data transforms, if required. Use the `IsIntegrationRefactored` when rule to retrieve data from the data layer in the data page.

> **Note:** To find the report definition and response data transforms, refer to the data page of the latest Pega Government Platform version.

Customizing data page response data transforms in implementation layer

When data page response data transforms are customized in the Pega Government Platform implementation layer, make the same changes to the new response data transforms only if required.

> **Note:** To find the new response mapping data transforms for the data pages, refer to the latest Pega Government Platform version data pages.

> **For example:**
>
> For example: if the response data transform *CopyPersonIntToData* is customized for the *D_PersonList* data page, perform the same steps in the new data transform *FetchPersonListDetails*.

Adding classes to communications and identifiers in implementation layer

When classes are added to the communications and identifiers wrapper classes in the Pega Government Platform implementation layer, customize the *Refactor_Identifier* and *Refactor_Comm* refactoring activities accordingly to meet your requirements.

> **For example:**
>
> For example: if a new class *PegaPS-Data-Comm-Twitter* is added for capturing Twitter account details, customize the code of the *Refactor_Comm* activity to set the respective data class names to the instances of the Twitter class.

Modifying State drop-down menu source

If data refactoring is performed by following the preceding sections, modify the source of the **State** drop-down menu.

For the sections that are overridden that use the StateList report definition (*PegaPS-Int-Config-State*), replace the source by using the *D_StatesList* data page.

Modifying Country drop-down menu source

In Pega Government Platform 8.3, the **Country** drop-down menu source has been changed from a report definition to a data page.

To use the Pega Government Platform out-of-the-box address-related sections, customize the corresponding data page in the implementation layer.

State label configuration

In Pega Government Platform 8.3, state labels specific to each country have been moved from the StateLabel decision table (*PegaPS-Data-Address*) to the Country data type.

After upgrading your application, any customizations to the decision table in the implementation layer must be also done in the Country data type. Customizations can be performed by using the Internationalization menu, which is accessed from the Pega Government Platform configuration in App Studio.

App Studio compliance changes

The Pega Government Platform has been refactored to be in compliant with App Studio in 8.5 release. As part of that, sections that are included in a wrapper section or harness or flow actions with the user level page context have been modified to use the editable data page.

To ensure a successful update of your application from previous releases, Revisit the following rule types that are overridden in implementation layers and which uses the user level pages and make the necessary changes by referring to the corresponding latest rule in the platform.

- Section
- Data transform
- Harness
- Activity

Extending new case types in implementation layer

In 8.7 release, PGP includes the Application request, Product and License case types. In 8.8 release, PGP includes the Time entry and Item related Add, Update, and View case types. In release '23, Pega Government Platform includes the Program definition and Program finder case types. To include this case in an implementation application that was built prior, complete the following steps:

1. Create a class record by using the format: *<OrgName>-<AppName>-Work-ApplicationRequest*, *<OrgName>-<AppName>-Work-Program*, *<OrgName>-<AppName>-Work-Program-License*, *<OrgName>-<AppName>-Work-TimeEntry*, *<OrgName>-<AppName>-Work- Entity-Item-Add*, *<OrgName>-<AppName>-Work-Entity-Item-Update*, *<OrgName>-<AppName>-Work- Entity-Item-View*, *<OrgName>-<AppName>-Work-Manage-Program*, *<OrgName>-<AppName>-Work-ProgramFinder*. For the class group, use the format: *<OrgName>-<AppName>-Work*.
2. For the directed parent class, based on the case type, use the format: for Application request entities - *PegaPS-Work-ApplicationRequest*. Similarly, use *PegaPS-Work-Program*, *PegaPS-Work-Program-License*, *PegaPS-Work-TimeEntry*, *PegaPS-Work-Entity-Item-Add*, *PegaPS-Work-Entity-Item-Update*, and *PegaPS-Work-Entity-Item-View*, *PegaPS-Work-Manage-Program*, and select the **Find by name first (Pattern)** box.
3. Optimize the properties for the newly created classes that are present in the external mappings of their corresponding directed parent class.
4. Save the class rule forms.

Modifying class context data transform rule

In Pega Government Platform 8.8, in the *LoadClassContext* data transform *(PegaPS-Data-Context- Application)(PegaGPCosmos:08-08-01)*, in steps 67-70, new work classes are added. In Pega Government Platform '23, in the *LoadClassContext* data transform *(PegaPS-Data-Context-Application)(PegaGPCosmos:08-23-01)* in steps 72-73, new work classes are added.

In Pega Government Platform'23, *LoadClassContext* data transform *(PegaPS-Data-Context- Application) (PegaGPCosmos:08-08-01)*, in steps149-150, new data classes are added.

Add these steps to your implementation layer-specific data transform, if present.

Modifying business context data transform rule

In Pega Government Platform 8.8, in the *LoadBusinessContext* data transform, *(PegaPS-Data- Context-Application) (PGPCosmos:08-08-01)*, new steps: from steps 100 to 108 are introduced. In Pega Government Platform '23, in the *LoadBusinessContext* data transform, *(PegaPS- Data- Context-Application) (PGPCosmos:08-23-01)*, new steps: from steps 109 to 111 are introduced.

Enabling operator creation in user registration functionality

For security reasons, Pega Platform operator creation is disabled in Pega Government Platform 8.4 and later. To enable the creation of an operator, save the **CreatePGPOperator** application setting with owning ruleset **PegaPS** to the implementation application ruleset, and set the value to **True**.

Optimized properties

A few properties are optimized in 8.6 for the *PegaPS-Work-Event-Initiate*, *PegaPS-Work-ICM-Subject-Initiate*, and *PegaPS-Work-ICM-Investigation-Initiate* classes. In PGP 8.8, few properties are optimized for *PegaPS-Work-Program*, *PegaPS-Work-Program-License* classes. In PGP '23, a few properties are optimized for *PegaPS-Work-ActivityPlan* classes.

Follow the same for the implementation layer specific classes to avoid issues in running the report definitions.

Elasticsearch

In Pega Government Platform 8.6, Elasticsearch is supported for improving the performance of the application for Person, Business, Vehicle, Facility, and Entity data classes and Investigation-Initiate work classes.

The existing list type data pages like D_PersonList, D_BusinessList, and so on of the corresponding classes are added with a new data source to fetch the details using Elasticsearch, and this is handled by a single DSS *PGP/ElasticSearch* which is by default set to *False*. Change it to *True* to enable Elasticsearch.

Alternatively, in App Studio go to **PGP** > **Application** to change the settings.

You can configure the number of results that Elasticsearch returns by updating the **PGP/DefaultElasticResultCount** DSS, which is by default set to 100 results.

Performance mode

In 8.6, a new DSS **PGP/PerformanceMode** is introduced to improve the performance of loading the entity pages.

When this DSS is enabled to true (by default its set to false), the entity data pages use Report definition instead of lookup to open the object.

Now entity data pages like D_Person, D_Business, and so on use data transform as the source and the corresponding D_PersonLookup and D_BusinessLookup has multiple sources defined, based on the setting which sets the data back to D_Person and D_Business.

Event life cycle changes in Pega Government Platform

In 8.6, a couple of stages are introduced to support the latest functionality. You must make the corresponding changes in the implementation layer-specific Event case, based on your business scenarios.

IACAuthentication service

Pega included IACAuthentication till the Pega Platform 8.6 release. Pega Platform 8.7 release does not include IACAuthentication, and the recommended approach is to use web mashup. This effects user registration related features like Registration, and the Forgot Password features of PGP Ui-Kit application. Implementation teams must make necessary changes to adopt to the latest Pega Platform 8.7 release changes.

IACAuthentication activity

In Pega Government Platform 8.7, the IACAuthentication activity is withdrawn from *PegaPS* ruleset. The IACAuthentication activity is moved to the UI Kit specific *PGPOverride* ruleset, because the PGP application does not use the IACAuthentication activity. Create a copy of this in your implementation ruleset if its being used in implementation application built on Pega Government Platform application. In Pega Government Platform'23, to enhance security, step 6 is modified in the IACAuthentication activity to check for password validation all the time. For the functionality to work, pass the password as parameter in the UserServices HTML Fragment rule along with the existing app name parameter.

For enhancing security, a new step 6 is added in the IACAuthentication activity to check for password validation. To skip this step, save the *CreatePGPOperator* application setting with the owning ruleset PegaPS, to the implementation application ruleset, and set the value to *True*.

Changes to entity search data pages in Pega Government Platform

In Pega Government Platform 8.7, the following search data pages are updated to support AND logical condition along with the existing OR logical condition. The default behavior is updated to AND from OR, because OR condition is applicable only in the search landing pages.

If the search landing pages are updated in implementation layer or the data page is being used elsewhere for OR scenario , update them by passing the value *true* to *UseOROperator* parameter of the data page.

Data pages
D_PersonList
D_BusinessList
D_FacilityList
D_VehicleList

Updating case edit actions

In Pega Government Platform 8.7, *Edit case details* , which is a default behavior of Pega Platform, is removed for Transfer ownership, Task, and Request access cases as they are not implemented. To enable the edit action, override the *DisplayEditAction* when condition to the implementation layer with the appropriate condition and add *pyUpdateCaseDetails* flow action to the case type rule. Else, remove the flow action from the case type rule, if present.

In Pega Government Platform '23, Edit case description is supported for Activity plan, Goal, and Task cases. To enable Edit option for Activity plan, Task, and Goal cases which are customized in implementation layer, add *pyUpdateCaseDetails* flow action to the implementation layer case type.

Changes to Registration.js

In PGP 8.7, the *goToLoginURL* and *showHomePage* functions in `Registration.js` file are updated to navigate the URL specific to the invoking application based on the application alias and this is supported by adding a new parameter **alias** to both the functions.

All the applications consuming these functions as-is need to send the alias parameter to the function where it is being invoked using the *Application.pyProductAlias* property. If the property is empty, set the alias on the application definition rule.

Changes to Unique ID generation

In Pega Government Platform 8.8, Unique ID generation is changed to improve the performance. To revert to earlier way of generating the Unique ID, Update the Optimize unique ID generation configuration to false.

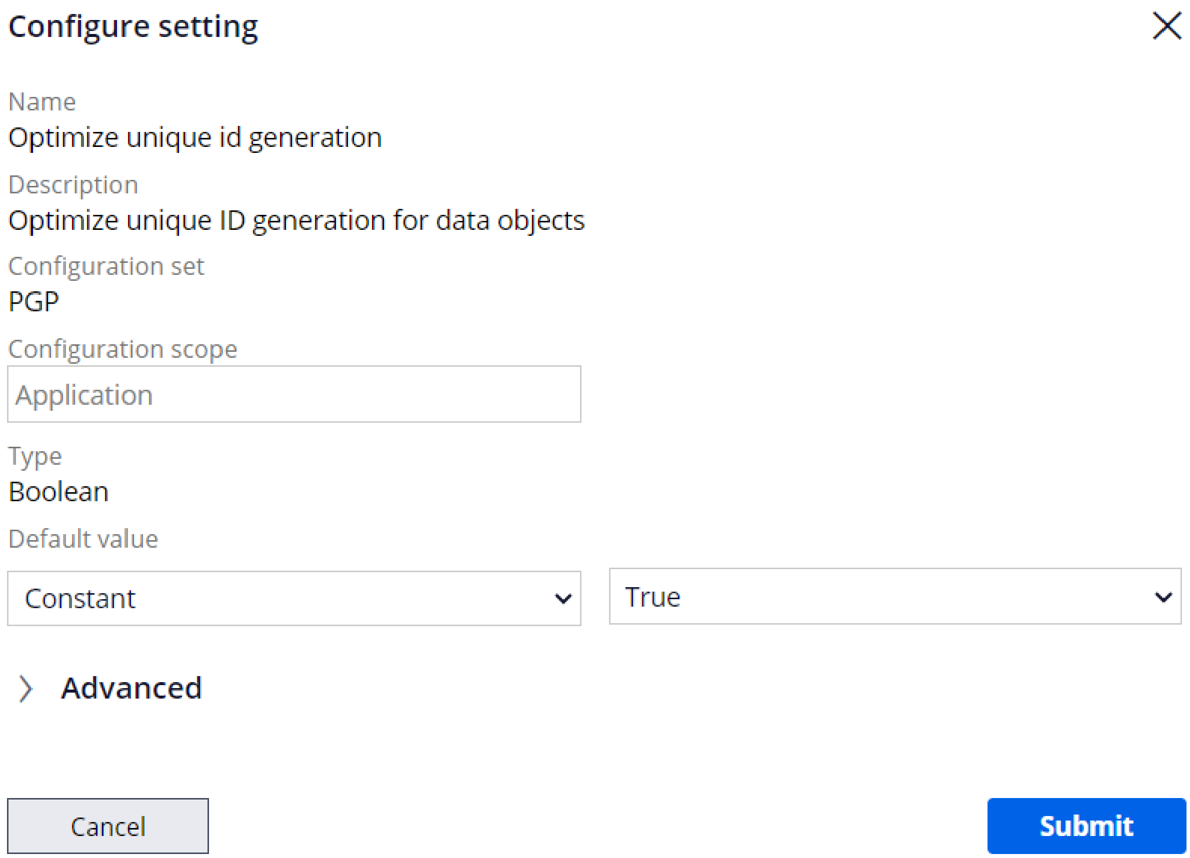
Follow these steps to set **Optimize unique ID generation** configuration setting to false:

1. In the navigation pane of App Studio, click **Settings** > **Configurations**.
2. Click the **Settings** icon at the end of **Optimize unique ID generation** row.

Configuration set: PGP						Total 5
Edit plan or goal or task details	if set to true, Allows user to edit plan, goal and task details.	Boolean	true	PGP	6/28/2023	
Entity audit	If set to true, enables the audit for Entities. Make sure the DSS: PGP/PerformanceMode is set to false.	Boolean	false	PGP	7/11/2022	
Item duplicate check	If set to true, enables the duplicate check of items	Boolean	true	PGP	2/25/2022	
Optimize unique id generation	Optimize unique ID generation for data objects	Boolean	true	PGP	3/21/2022	
QP instead of agent	Use queue processor instead of agent	Boolean	true	PGP	7/1/2022	

PGP Configuration set

3. Select constant value as **False** to revert to earlier way of generating the Unique ID and click **Submit**.



Optimize unique ID generation config setting

Queue processor for sending emails

In Pega Government Platform 8.8, for case types that use **PegaPS** agent to initiate sending an email is changed to use **Queue processor**. To revert to using the agent, update the **QP instead of agent** configuration to **false**.

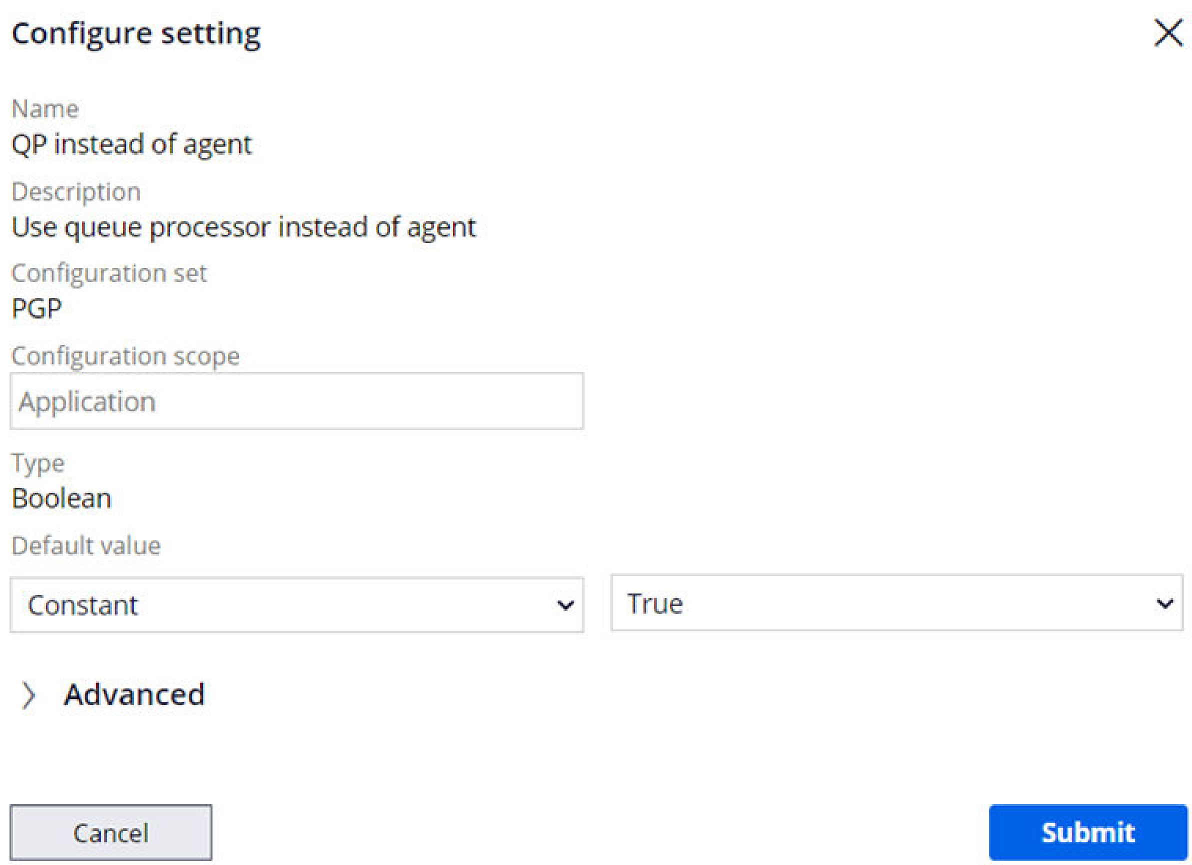
Follow these steps to set the **QP instead of agent** configuration setting to false:

1. In the navigation pane of App Studio, click **Settings** > **Configurations**.
2. Click on **Settings** icon at the end of the **QP instead of agent** row.

Configuration set: PGP						Total 5
Edit plan or goal or task details	if set to true, Allows user to edit plan, goal and task details.	Boolean	true	PGP	6/28/2023	
Entity audit	If set to true, enables the audit for Entities. Make sure the DSS: PGP/PerformanceMode is set to false.	Boolean	false	PGP	7/11/2022	
Item duplicate check	If set to true, enables the duplicate check of items	Boolean	true	PGP	2/25/2022	
Optimize unique id generation	Optimize unique ID generation for data objects	Boolean	true	PGP	3/21/2022	
QP instead of agent	Use queue processor instead of agent	Boolean	true	PGP	7/1/2022	

PGP Configuration set

3. Select constant value as **False** to revert to agent and click **Submit**.



Configuration setting

Security policies for password validation in user registration

In Pega Government Platform 8.8, an *Edit validate* rule has been added to the password property (**CL: PegaPS-Data-Registration**) to support security policies for the accounts created by the user registration feature. This has an impact on existing in-flight cases. Take corrective action in the implementation layer, as the new validation is added to the password property, existing accounts with invalid passwords might cause issues or will throw exception. This is applicable only if you are using the user registration feature in PGP.

In addition, the **Do not save property data** option is enabled for the **Confirm password** property, which captures the confirm password in text format.

History and Field audit for entities

In Pega Government Platform '23, History and Field audit is enabled for all the supported entities in all PGP application built on Theme Cosmos.

To enable this feature after upgrade, follow these steps:

- Enable the Entity audit configuration from app studio.
- Make sure the **DSS PGP/PerformanceMode** is set to false and flush the **D_PerformanceMode** data page for the DSS changes to take effect.

This feature does not work as expected for auditing list properties like Address List for the entity instances which are created before upgrade.

Skip entity persistence in entity flows

In Pega Government Platform 8.8, to improve performance, the entity persistence logic is skipped when there are no changes performed to the existing details of an entity. This is developed for the below entity related flows in *PegaPS-Work* class.

- BasicPersonalInformation
- PersonInformation
- BusinessInformation
- ManageVehicle
- ManageHousehold
- ManageFacility

New declare indexes

In Pega Government Platform 8.8, we have introduced three new declare indexes for supporting the **Activity Plan usage** feature. The following are the classes to which new declare indexes are added and this is supported only for the cases created from release 8.8.

- *PegaPS-Work-Task*
- *PegaPS-Work-Goal*
- *PegaPS-Work-ActivityPlan*

Changes to VIS.JS

In Pega Government Platform 8.8, we have updated the code in VIS.JS text file to refer to the latest VIS-Network js. As a result, if the code is used in your implementation layer, you must adopt the latest changes of it. In Pega Government Platform, as part of adoption, we have added **shakeTowards: "roots"** as a value to the hierarchical layout settings. Check *EntityAssociationControl* for reference.

Vis.JS file (deprecated in 8.8) is made available in release '23. You can use this file after upgrading PGP from release 8.8 to '23. Check *EntityAssociationControl* for reference and we highly recommend you follow the same approach in implementation layer.

Activity plan life cycle changes

In Pega Government Platform release '23, reopen option is provided for Task case so that a closed task case can be reopened to provide additional information or details. Once the task is reopened, the respective parent cases such as goal and activity plan are also reopened if they are already closed.

Based on your business scenarios, make the corresponding changes in the implementation layer under specific task, goal, and activity plan cases.

> **Note:** If the reopen stage is 1st alternate stage for task, then make sure that the other case types like Goal, Activity Plan also have the reopen stage as 1st alternate stage.

Backward compatibility for Program configuration

In Pega Government Platform '23, Program definition case type is introduced to manage and define programs. When using the Program definition feature, optionally the existing program and license data objects created from app studio can also be converted to cases to reuse the case type end-to-end capabilities.

To convert the existing program and license data objects created from App Studio into program definition cases for backward compatibility, you must perform the following steps.

1. Log in to the pega environment by entering the administrator ID, for example, administrator@pega.com and the password that you used during installation.
2. In the header of Dev Studio, click **Records** > **Technical** > **Activity**
3. Search and open the rule, *ConvertProgramDataToCase (cl;PegaPS-work, RS:PgpCosmos)*.
   Any implementation layer specific use cases and properties can be added to extension Data transform provided in this activity.
4. Save as the *ConvertProgramDataToCase_EXT* data transform provided into implementation to add additional properties or use cases.
5. Click **Actions** > **Run**

Time management lifecycle changes

For release '23 in Time Management the time entry feature supports cascading approval. You can control the routing of approvals based on the configuration of the time management project.

As part of this release, four columns are introduced. They are Enable Approval, Projec t Approver, Time Code Approver, and Team Manager Approver. In release 8.8, the time entry case was sent for approval to Team manager. After upgrading to '23, if existing project instances (created in 8.8) are selected while entering the time, the time entry case will be automatically approved.

In order to use the functionality as release 8.8 or send time entry cases with old project details to Team manager approval in '23, follow the below steps:

1. Login to Pega environment with by entering the administrator ID. For example, administrator@pega.com and the password that you used during installation.
2. In the header of Dev Studio, click **Records** > **Technical** > **Activity**
3. Search and open the rule, *RefactorProjectInstances (cl;PS-TimeMgmt-Data-Project , RS:TimeMgmt)*.
4. Click **Actions** > **Run**

> **Note:** Alternatively, we can also manually check the **Enable Approval** and **Team Manager** checkbox for each project instance in Project data type from App Studio.

Moving countries and states

In Pega Government Platform '23, the sample records provided for Country and State data types are moved to **PegaGP_SampleData.jar**. There will not be any impact on upgrades.

> **Note:** Importing sample data is optional and not recommended to be installed in the production environment as the sample data provided might not align with your business needs.

Implement

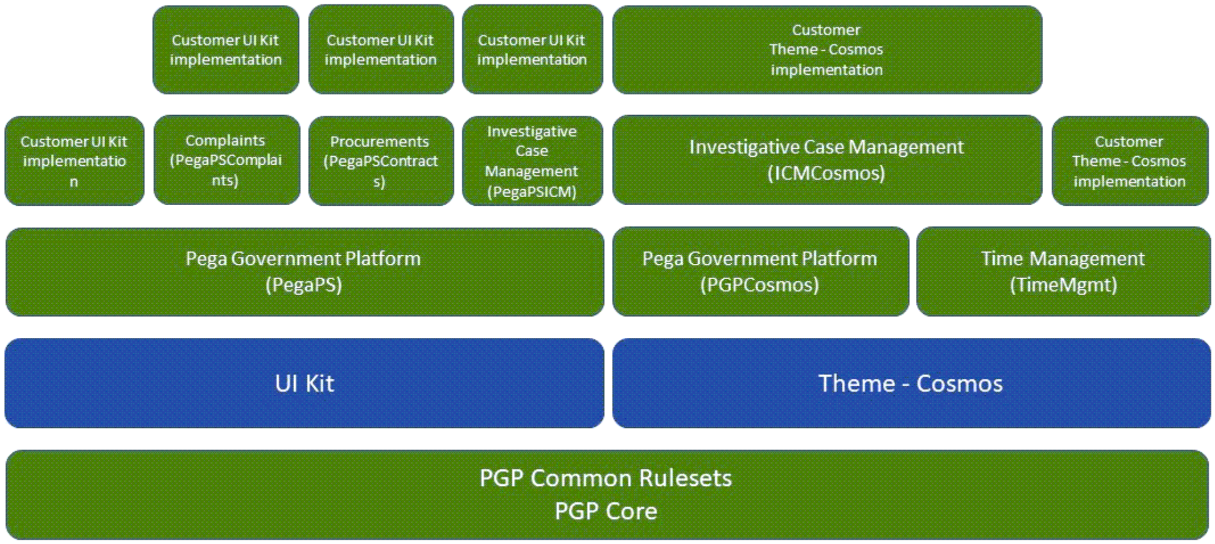
Pega Government Platform™ (PGP) is a low-code solution that allows business and IT users to collaboratively build with model-based application design, ensuring the complete solution meets end-user needs. This agile, secure, unified solution gives agencies a tool for transformation without having to "rip and replace" existing government systems.

Pega Government Platform provides a public sector-oriented foundation with processes, data structures, and components that you can reuse to modernize existing government systems and accelerate implementations. The application augments Pega Platform with public sector-specific capabilities, including a government data model, UI templates, dashboards, reports, workflows, and case types. It accelerates solution delivery, leveraging assets, features, and components built specifically for the public sector and assembled using the Pega Platform tools.

The Pega Government Platform product has comprehensive case management capabilities, which, along with the master data structures, allows you to specialize quickly where needed.

To summarize, Pega Government Platform is:

- A low code platform that caters to the citizen developer through easy to re-use components (UI, flow, user actions, and case types).
- Functional as an accelerator (uses easy to configure, extensible components to deliver better results faster).
- Not a turn-key solution



PGP application architecture

- Preparing for implementation
- Prerequisites
- Creating a new application
- Application setup utility
- Application configurations
- Updating dynamic class referencing
- Integrating with third party apps
- Implementing case types
- Connecting system of record
- PGP application data model
- Managing reference data
- PGP entities

- **Features implementation**
- **Appendix A: Using Pega Government Platform (PGP) from Pega Customer Service**
- **Appendix B: Integrating industry applications with Pega Customer Service**
- **Appendix C: Mobile strategy**

Preparing for implementation

A project team that implements a Pega application can use this implementation guide to enable and extend application features to meet client business requirements. You must complete the product installation before starting the implementation procedures.

For information about installing your application, see the product installation guide.

This implementation guide presents tasks in the sequence in which they are commonly performed; however, the sequence varies based on business priorities. Follow the procedures in this guide to complete the tasks for the first minimum lovable product (MLP) release. Also, use this guide during iterative releases as you configure and extend more features on top of the MLP release.

Prerequisites

To prepare the implementation environment and to create your application, complete the following preparation tasks:

1. Consult with your database administrator to determine whether the installation or update process can make automatic changes to the database schema. Alternatively, the database administrator may need to manually apply the DDL files that include schema changes. For more information see, Install guide.
2. Install to the latest version of Pega Platform '23, and ensure that you can log in as an administrator. For more information, see the *Pega Platform Install or Update Guide* for your environment on the Deploy Pega Platform page.

Patch releases are available through Pega's standard software delivery process. You can request software through Pega Software Distribution or by contacting GCS.

3. Apply any required hotfixes by using the Hotfix Manager. For more information, see Applying hotfixes. To review the Pega Government Platform hotfixes, see the Pega Government Platform Hotfix page.

Creating a new application

Run the New Application wizard to create your application.

1. Create a new operator ID to run the New Application wizard.
    a. Log in to Dev Studio by using the operator ID *administrator@pega.com* and the password that you specified for that operator.
    b. Save a copy of the existing *administrator@pega.com* operator and give it a name that identifies it as an Application Setup operator.
    c. Add the *PegaGPCosmos:Administrators* access group to the new operator record, and then click the radio button to the left of the access group to select it as the default access group.
    d. Save the new Application Setup operator.
2. Log in as the Application Setup operator.
3. In the header of Dev Studio, click the name of the application, and then click New Application.
4. Select built-on application from the list of applications (theme-cosmos) displayed such as Pega Government Platform, Investigative Case Management, and Time management. If you want to build your application on top of PGP UI-Kit applications, click **Search all types**, and select your built-on application from the list.
5. Follow the New Application wizard instructions until the **Name your application** page opens, and then follow the steps below.

   For more information about each step of the wizard, see Creating an application.

6. On the **Name your application** page, enter the name of the application, and then click Advanced configuration.
7. In the Organization settings section, enter the Organization name, Division name, and Unit name for this application.

   The New Application wizard creates the application class structure for you based on the organization settings that you enter. For more information, see Class layers and Class hierarchy and inheritance.

   If you have not already defined the organization entities (for example, if you have not already defined the division), type the name of the new entity in the appropriate field. The application saves the new values when you create the new application.

   > **Note:** For the new application, the organization name cannot be PegaPS.

8. Click Save.
9. Click Create application.

   The Application Wizard creates the implementation application. The application includes one system administrator operator so that you can log into the application after you complete the wizard.

10. To open the new application, click Go to app.

   > **Note:** This process creates a set of access groups for the new application as per your built-on application. Copy the access roles from the built-on application access groups and add them to the corresponding implementation access groups. Create your own operators, and then add the appropriate access groups to operators.

Application setup utility

This utility helps in creating or modifying the required rules and structures to support the implementation layer. For example, adding access groups to operators, look up data pages, and so on.

After the implementation layer is created, perform the configurations described in the following steps. Ensure that you are logged in as a developer.

1. Log in to Pega Government Platform using administrator operator account, you created during new application phase.
2. In the header of your workspace, click the Switch Studio menu, and then click App Studio.
3. In the navigation pane of App Studio, click PGP > Application setup.
4. Click Setup application, and then click **Done**.

When Application setup is run, it automatically runs the implementation layer steps required for the apps built-on Pega Government Platform and it performs the following actions.

- Overrides the lookup data pages in base applications work classes to implementation layer specific work classes and updates the source of lookup to the implementation work class.

- Overrides all node level data pages which are in the pattern inheritance of *PegaPS-Data-Context* class to the implementation layer and sets the access group to the implementation layer Admin Access Group. For example, if built-on is *PegaGP*, *PegaPS-Data-Context-Application* is the class. If built-on is ICM then it also considers *PegaPS-Data-Context-ICM* as well as per pattern inheritance.

- Updates the operators of base application with implementation specific access group and sets it to default.

- Updates the implementation Application Data class direct inheritance with the data class of the base application.

Alternatively, teams can perform the above-mentioned steps manually if only a subset of the steps is required.

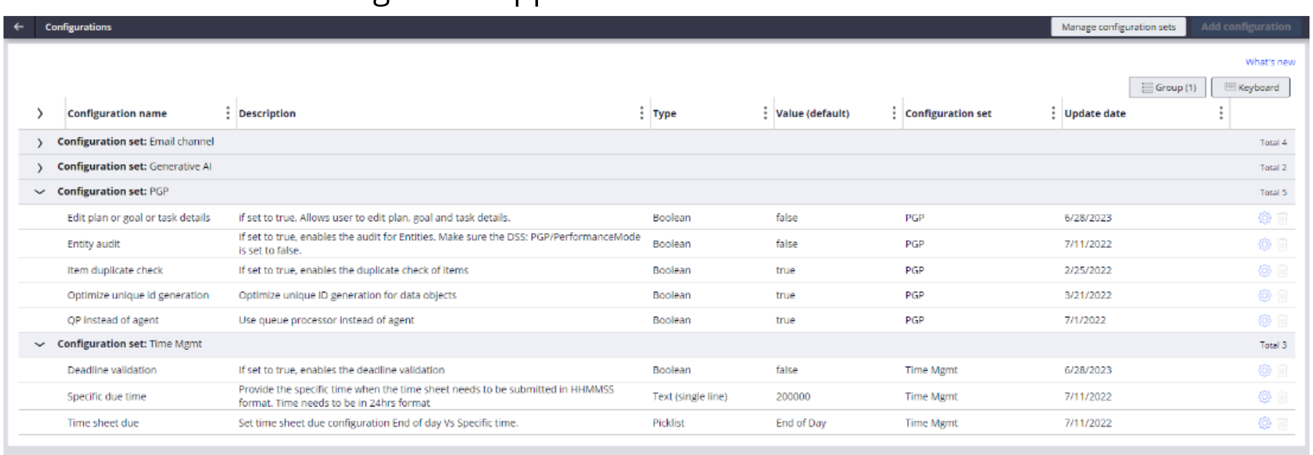
Application configurations

Pega Government Platform uses configuration sets in the application to control the behavior of the application, and minimize rule overrides and custom rule changes. The settings are organized into configuration sets that associate the settings with a common element, such as an application feature or specific case type.

Configuration sets in Pega Government Platform

Pega Government Platform uses configuration sets in the application to control the behavior application, minimize the rule overrides and custom rule changes. The settings are organized into **Configuration sets** that associate the settings with a common element, such as an application feature or specific case type.

The following figure shows the configuration sets used for the Pega Government Platform and Time Management applications:



Configuration name	Description	Type	Value (default)	Configuration set	Update date
Configuration set: Email channel					Total 4
Configuration set: Generative AI					Total 2
Configuration set: PGP					Total 5
Edit plan or goal or task details	if set to true. Allows user to edit plan. goal and task details.	Boolean	false	PGP	6/28/2023
Entity audit	If set to true, enables the audit for Entities. Make sure the DSS: PGP/PerformanceMode is set to false.	Boolean	false	PGP	7/11/2022
Item duplicate check	If set to true, enables the duplicate check of items	Boolean	true	PGP	2/25/2022
Optimize unique id generation	Optimize unique ID generation for data objects	Boolean	true	PGP	3/21/2022
QP instead of agent	Use queue processor instead of agent	Boolean	true	PGP	7/1/2022
Configuration set: Time Mgmt					Total 3
Deadline validation	If set to true, enables the deadline validation	Boolean	false	Time Mgmt	6/28/2023
Specific due time	Provide the specific time when the time sheet needs to be submitted in HHMMSS format. Time needs to be in 24hrs format	Text (single line)	200000	Time Mgmt	7/11/2022
Time sheet due	Set time sheet due configuration End of day Vs Specific time.	Picklist	End of Day	Time Mgmt	7/11/2022

Configuration sets

You can change the default value of these configuration sets to alter the behavior and enable or disable any settings.

For more information, see Creating a configuration set.

Adding field names to error messages

Help users who rely on screen readers get the information that they need to complete forms in your application.

Enable the *displayFieldNameInValidationMsg* DSS (Dynamic Systems Settings) setting to **true** in your application to ensure that the error message script for the screen reader includes the name of the field that produced a validation error and the error message.

For example, the system displays an **Error: Value cannot be blank message**. After you enable *displayFieldNameInValidationMsg*, the screen reader output is *Error <First name>* cannot be blank.

For more information on steps to enable this setting, see Adding field names to error message readouts.

Limiting the visibilty of sensitive data items through attribute-based access control (ABAC)

What is attribute based access control?

Attribute-based access control (ABAC) and role-based access control (RBAC) are two ways of controlling the authentication process and authorizing users.

The difference between ABAC and RBAC is that ABAC provides access rights based on user, environment, or resource attributes, for example, a data page on the clipboard, while RBAC provides access to resources or information based on user roles, such as an Access Role or Access Role to Object rule. Essentially, RBAC controls broad access across an organization, while ABAC takes a fine-grain approach.

Pega Platform provides rules that you can use to implement access control by using values of attributes that are present on the clipboard:

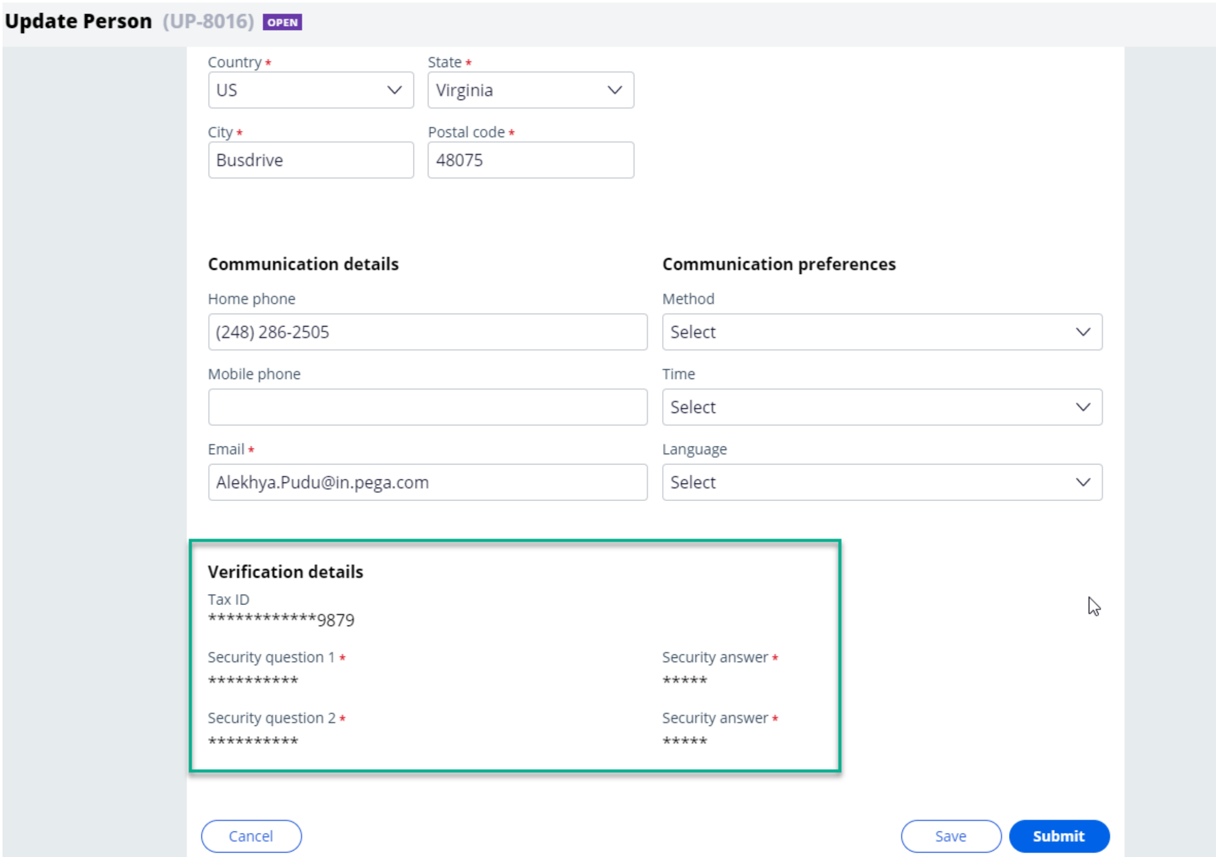
- Access Control Policy
- Access Control Policy Condition
- Access When

Use case examples

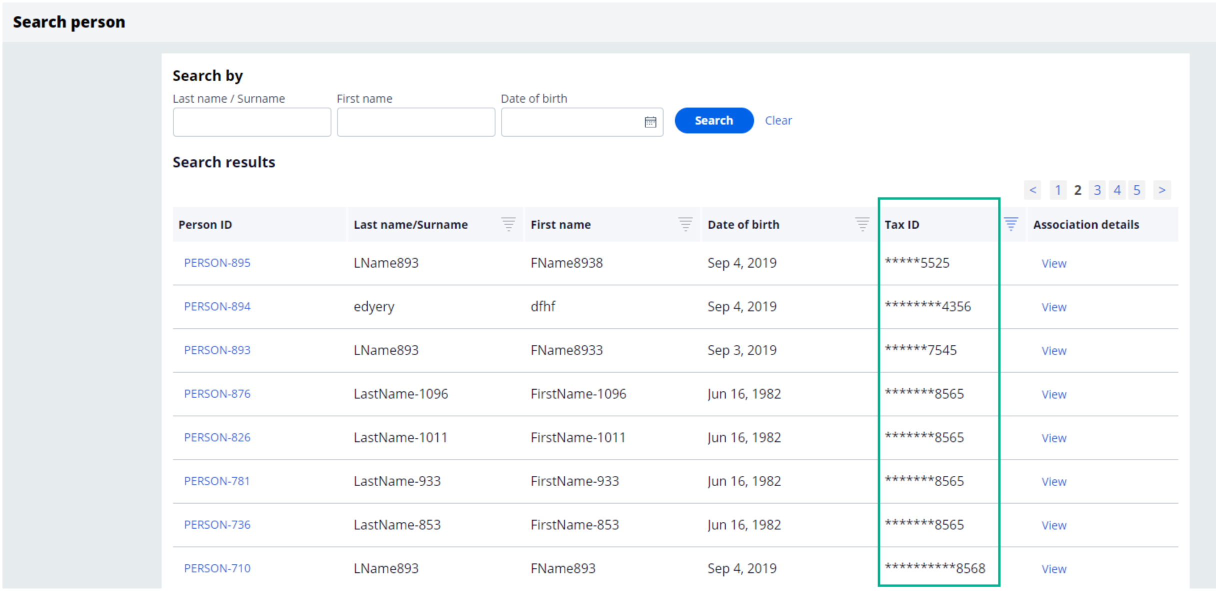
Use the ABAC security feature in Pega Platform to mask sensitive data, such as personally identifiable information (PII), so that any unauthorized users cannot see it.

In the following examples, the ABAC Access Control Policy rule is used to mask sensitive data that is stored in `Tax ID`, `Security question` and `Security answer` properties of an instance of a `Person` data entity so that an unauthorized user cannot see the property values:

- A non-administrative end user can add, view, and update the `Person` entity instances that they own, but they cannot view sensitive data of instances they do not own.
- An administrative end user, such as an operator with the manager access role, can add, view, and update all the sensitive data of any `Person` entity instances.
- A general case worker can add a new `Person` entity instances and enter the `Tax ID`, `Security question`, and `Security answer` values, but they cannot view or update the sensitive data properties after adding the entity.



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.



Search person

Update Person

Implement attribute-based access control

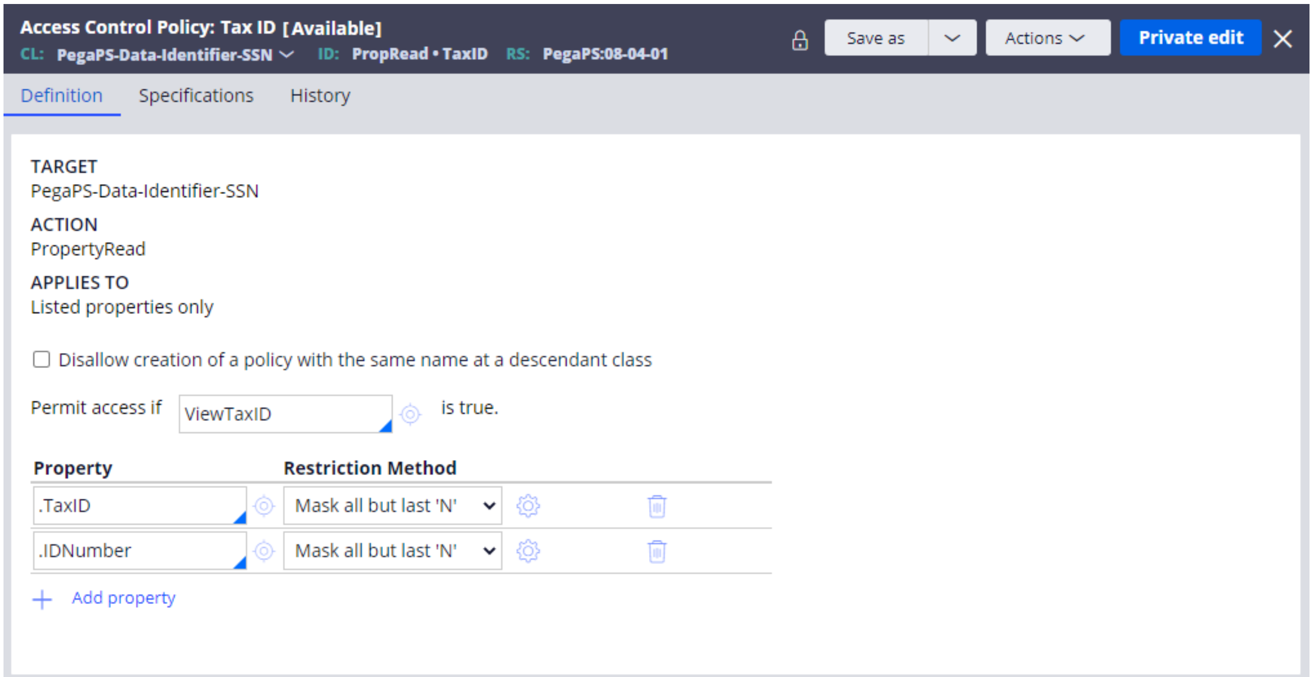
The following content represents the ways to implement the attribute-based access control.

To implement this example, two Access Control Policy rules were created:

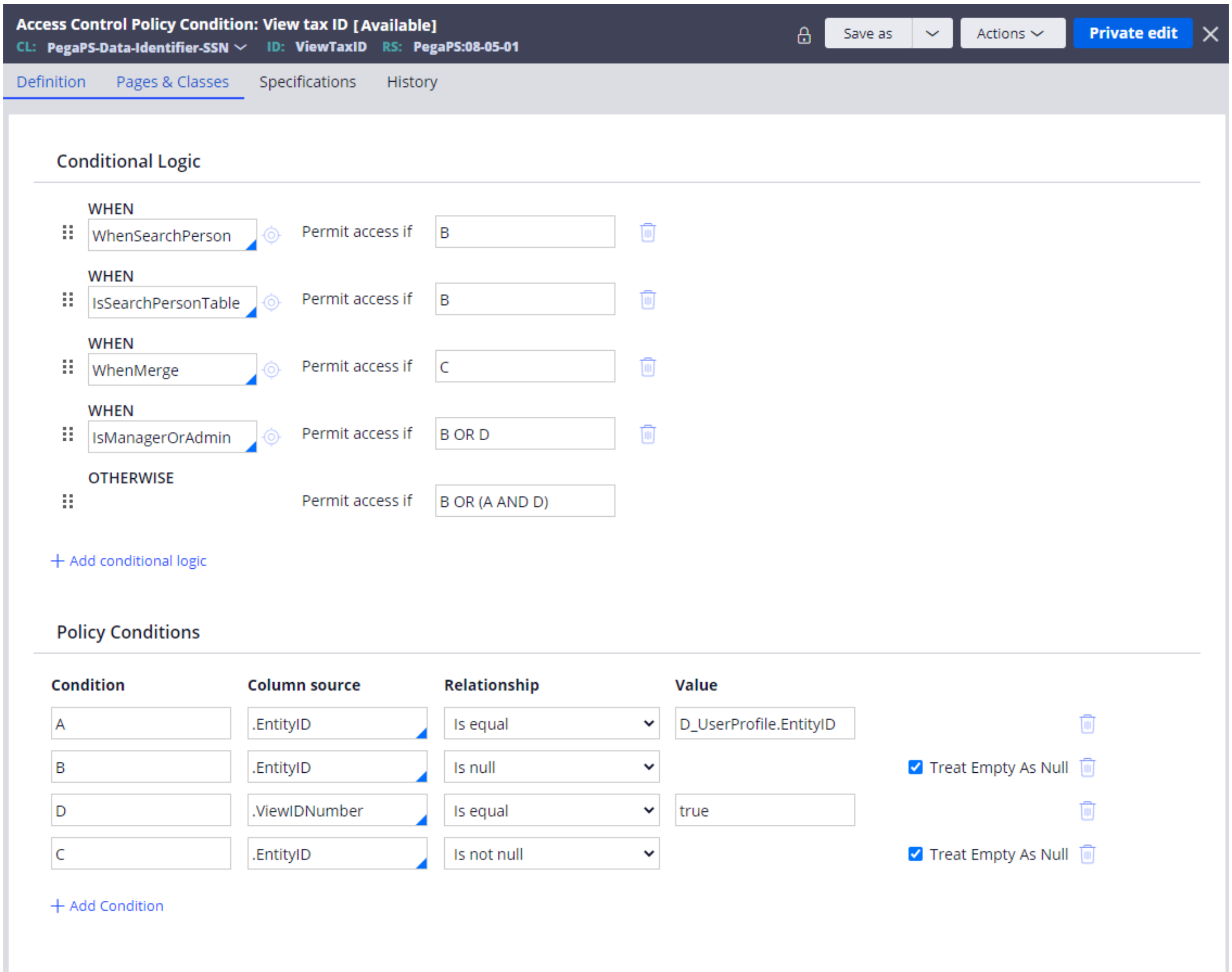
- `PropRead .TaxID`
- `PropRead .QuestionAndAnswers`

To allow the grant of custom permissions, two Access Control Policy Condition rules were created

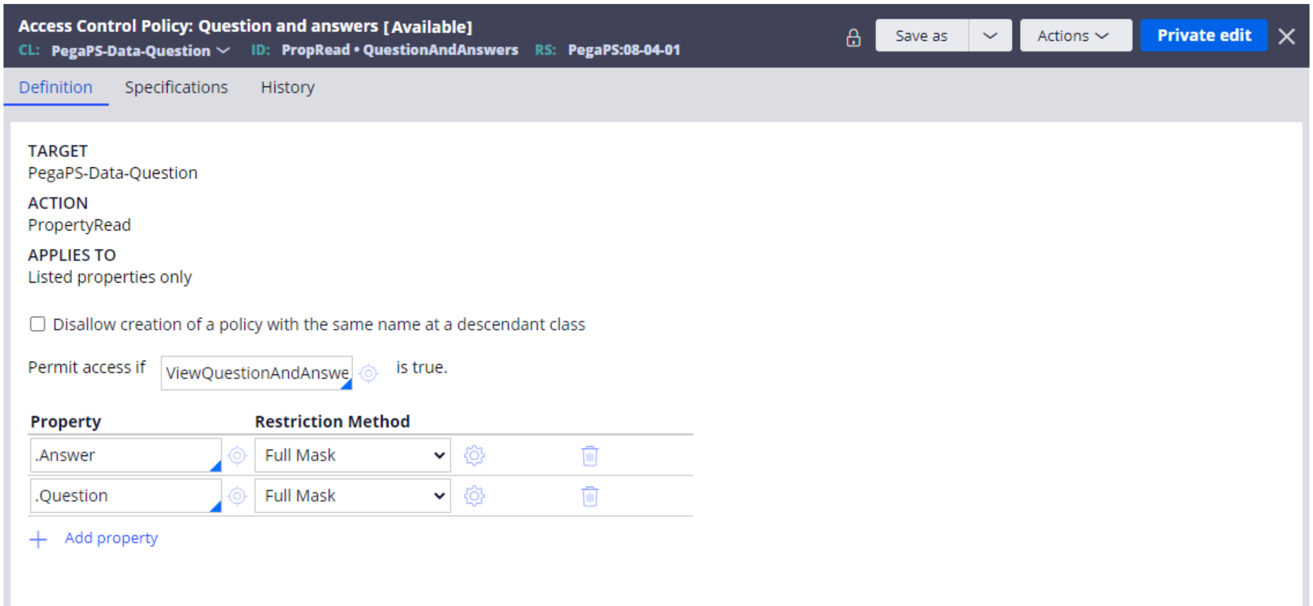
- `ViewTaxID`
- `ViewQuestionAndAnswers`

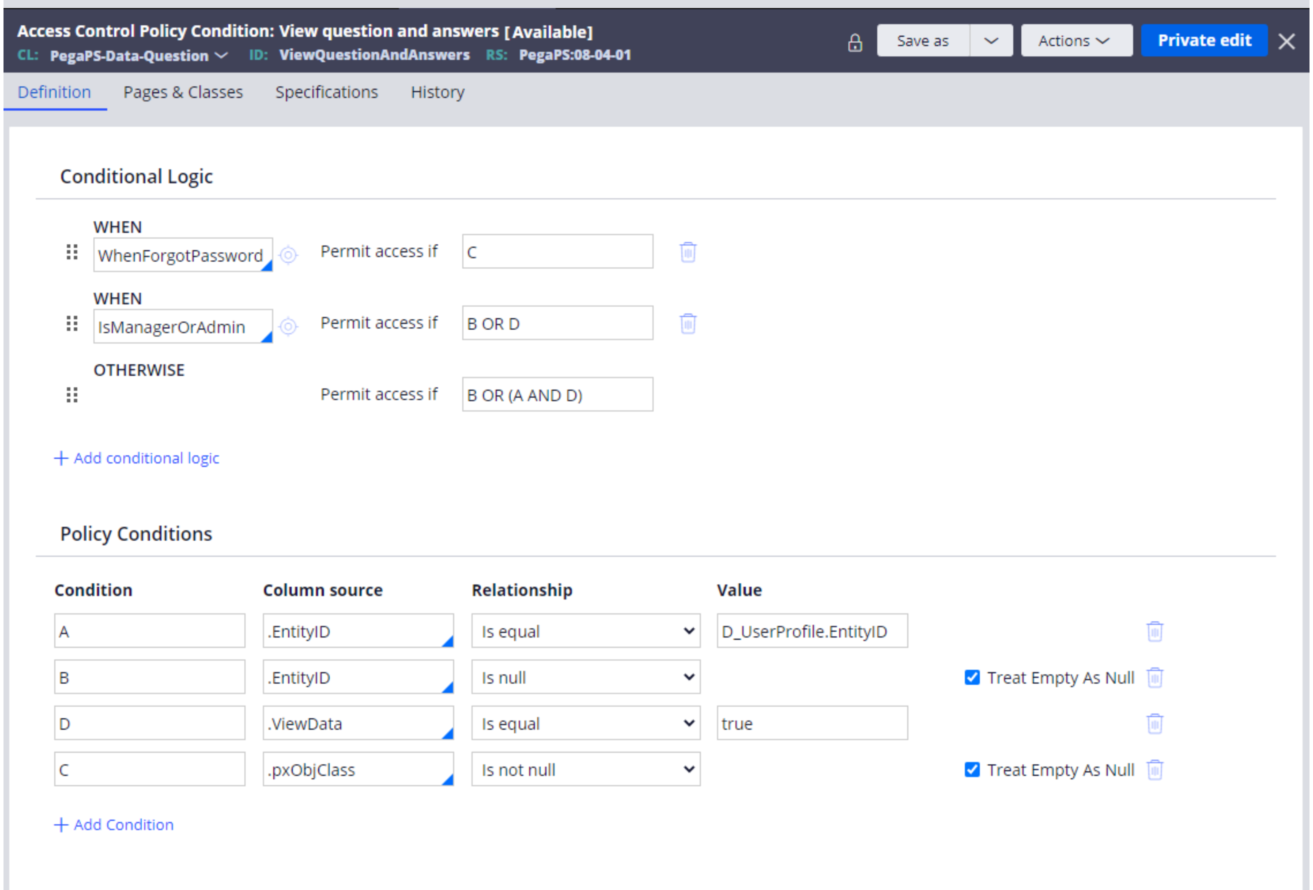


Access Control Policy: PropRead TaxID



Access Control Policy Condition: ViewTaxID





Access Control Policy: ViewQuestionAndAnswers

Access Control Policy: PropRead QuestionAndAnswers

Updating dynamic class referencing

In Pega Government Platform, once the application setup is executed in the implementation layer, the DCR data pages automatically identifies the respective implementation classes for the PGP provided work classes. This is implemented in the *SetDescendantWorkClasses* and *SetICMDescendantWorkClasses* Data transforms of both PGP and ICM applications.

Implementation teams need to review the new work classes and override LoadClassContext of the respective application for any modifications or additions.

Similarly, the application level constant values are also updated as per the implementation values. For any modifications or additions to them as per implementation teams need to override LoadBusinessContext data transforms.

Integrating with third party apps

In Pega Government Platform, Google maps integration is used for displaying the current location and the Nearby locations and cases feature. For example, by integrating with Google Maps, a user of the Pega Government platform can view the nearby entities and cases from within a certain distance of their current location.

To integrate this feature in the application, perform the following steps in your environment. Ensure that you are logged in as a developer.

1. Log in to the application as an administrator.
2. Navigate to **Records** > **Sysadmin** > **Dynamic system settings**
3. Open the DSS with setting purpose as `uiengine/map/googleapikey` and OwningRuleset as **Pega-EndUserUI**
4. Set the Google API key in the value text box
5. Click Save
   For more information, see Geographic-reference.

Implementing case types

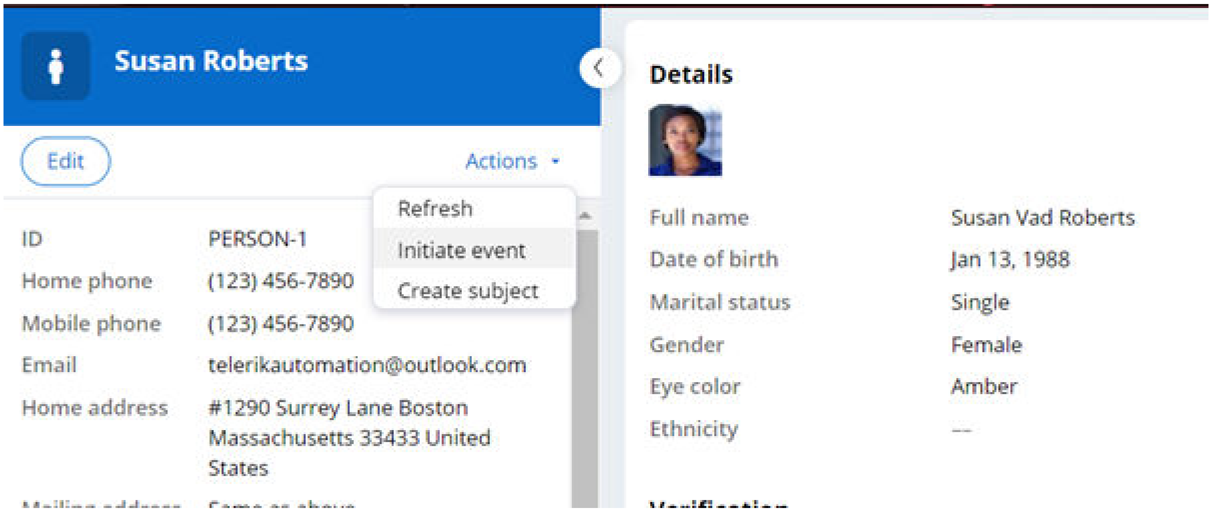
This section describes standard cases available with Pega Government Platform along with how these end-to-end case types can be used, extended, and customized for various business needs.

- **Initiate event**
- **Investigation case management**
- **Interview case**
- **Evidence case**
- **Manage associations**
- **Application request**
- **Program finder**

Initiate event

Pega Government Platform™ features an end-to-end event case type, which helps government organizations improve the resolution process of reported events of various types such as theft, disturbance, or narcotics, as well as incidents and grievances.

Intake specialists can initiate an event in the application, can perform and track actions. You can also initiate an event from the context of person entity and that event will get associate to the person.



Intitiate event

Adding a field to existing event details form

When adding an event to the system, to add a field to be captured on the event details capture screen, complete the following steps.

1. Create a property in the *PegaPS-Data-Event* class.
2. Add the newly created property to the EventDetails (*PegaPS-Data-Event*) section.

Capturing an additional address for an event

By default, when creating an event, one address is captured.

To capture an additional address, complete the following steps.

1. Create a record in the *AddressType* (*PegaPS-Data-Config-AddressType*) data type with the new address details.
2. Add a step in the *pySetFieldDefaults* (*PegaPS-Data-Event*) data transform for the new address type initialization.
3. Update the *EventInformation* (*PegaPS-Work*) section to include the new address type with the PageContext set as .Event.AddressList(2).

Adding a field to existing review actions in event review screen

By default, the event review screen displays the following review actions in ICM application: open an investigation, Associate to an existing investigation, Need additional information, Issue warning, No Action-Invalid event, and No Action-Duplicate event. And in Pega government platform application, review screen displays the following review actions: Approve, Reject and Return.

To add a new review action for an event, complete the following steps.

1. Create a record in the Option Map *(PegaPS-Data-Config-OptionMap)* data type with the new review action.
2. Specify the field name as **C_EventReview** for the Pega Government Platform application.
3. Create a record in the ICM Option Map *(PegaPS-Data-Config-OptionMap-ICM)* data type with the new review action.
4. Specify the field name as **C_EventReviewAction** for the ICM application.
5. Open the *ReviewEvent (PegaPS-Work-Event-Initiate)* flow and click the **Save as** button.
6. Update the connectors that result from the decision shape with the newly introduced actions.

View event

Pega Government Platform and Investigative Case Management users can view events and their associated data.

Extending Event view page

Extend the Event view page and display other properties of an event.

1. Define the new property in *PegaPS-Data-Event*, if the new property does not exist.
2. Add the created property in the *Details (PegaPS-Data-Event)* section.
3. To display a new utility, create the utility in the *PegaPS-Work-Event-Initiate* class, and add the utility to the *pyCaseMainInner (PegaPS-Work-Event-Initiate)* section.

Search event

Use Search event to search the events in the system based on their basic information.

Search for events by using inputs such as Name, Event ID, Report type, State, and City.

Adding new search criteria

Add a field to the search criteria for the Search event function.

1. Open the *SearchEventTable (PegaPS-Data-Portal)* section, and then add the required field to the section.
2. Add a parameter to the *D_SearchEventList* data page and pass the value of the search text to this parameter in the above section.
3. To filter the records based on this field, add the parameter to the *SearchEventList* report definition, and add the parameter in the filter conditions.

Adding a field to Search event search results

To add a field to the search results for the Search event function, complete the following steps.

1. Add the required property to the columns space of the EventDetails report definition to retrieve it from the database.
2. Add the new column to the repeating grid in the SearchResults (*PegaPS-Data-Event*) section and refer to this new field.

Event creation through email

The system can create an event work item for an inbound email from a reporter. The system can also parse the email and map the information from the email to an event work item.

Customizing response message

To customize the response message, complete the following steps.

1. Save as the following HTML rules:
   - EmailHeader (*Work-*)
   - EmailResponse (*Work-*)
2. Update the rules based on your requirements.

Setting up an email listener for event creation

To configure an email listener in an implementation layer to initiate an event through email, complete the following steps.

1. Create an email account.
   a. Click **Records** > **Integration-Resources**, then click **Email Account.**
   b. Save as the *PegaPS-Work-ICM* email account in the implementation layer, for example, *PegaPS-ICMImpl-Work-ICM*.
   c. Update the email address in the sender section and receiver section as necessary.
2. Save as the ICMImplEventListener operator and change the access group to the administrator access group of the implementation application.
3. Configure the email listener.
   a. Click **Records** > **Integration-Resources**, then click **Email Listener**.
   b. Save as the ICMEventEmailListener listener to the implementation layer, for example, ICMImplEventEmailListener.
   c. In the email account section of the listener, update it to use the email account that was created earlier, which in this example, is *PegaPS-ICMImpl-Work-ICM*.
   d. Save as the service package (EmailApproval) and change the access group to the administrator access group of the implementation application.
   e. Update the service package in the Listener properties section of the email listener.
   f. Update the service class to the Event initiate class of the implementation application, for example, *PegaPS-ICMImpl-Work-Event-Initiate*.
   g. Save as the service method CreatepyStartCase in the email listener to the implementation layer ruleset. Change the primary page class to the

implementation layer's request access class, for example, *PegaPS-ICMImpl-Work-Event-Initiate*.

h. Update the requestor login section of email listener with the operator that you created earlier.
i. Save the email listener.

4. Add the email listener.
    a. Open Admin Studio.
    b. Click **Resources**, then click **Listeners**.
    c. In the **Start/restart listener** menu, select the listener that was created in the previous step and click **Apply**.
    d. Refresh the Active listeners section.

> **Result:**
>
> The listener displays in the list.

Investigation case management

The Investigation Case Management application is meant for a different set of users, such as Investigators, ICMAgents, and so on. Use the application to manage the entire life cycle of an investigation.

The following list details some of the features of Investigation Case Management:

- Create investigations either standalone or from an event.
- Capture details for a case by using components such as interview, evidence, subject, and activity plans.
- Set the authorization of a user and how they search for, and view cases.
- Create case reports with features such as custom audits, visualizations, timeline control, and case closure.

Investigation case

An Investigation Case Management user can create a standalone investigation case.

To use the Investigation case in the implementation layer, save as the D_Investigation data page in the implementation layer and update the lookup with the implementation class name in the source.

Adding a field to existing investigation details form

When conducting an investigation, you must capture a certain number of details about the case.

Assume that you need to capture one more field when adding an investigation to the system. To add a field, complete the following steps:

1. Create the new property in the *PegaPS-Data-Investigation* class in the implementation layer.
2. Add the newly created property to the CaptureInvestigationInformation (*PegaPS-Data-ICM-Investigation*) section. Save as the section in the implementation layer.
3. Add a new property to an external organization:
    a. Create the new property in *PegaPS-Data-Entity-Business*, if the property does not exist.
    b. By adding a column in the table, add the newly created property in the *OrganizationList (PegaPS-Data-ICM-Investigation)* section.
    c. Update the *BusinessListWithAddress* report definition with the new property created above.

Viewing an investigation

As an Investigative Case Management user, view an investigation and the associated data collected during the investigation.

The case view shows the relevant information about the investigation in different tabs.

Investigation-specific data is displayed on the **Details** tab as an overview.

Add the property to display in the *Details (PegaPS-Data-ICM-Investigation)* section.

For information about adding a property, see Adding a field to the existing investigation details form.

Adding a search field

Search investigations in the system by using basic information such as investigation name, investigation ID, status, and reported activity.

To add a search field, complete the following steps.

1. Open the *D_SearchInvestigationResults* data page and the *InvestigationResults (PegaPS-Work-ICM-Investigation-Initiate)* report definition. Add a parameter under the **Parameters** tab to both the rules.
2. On the **Query** tab of the *InvestigationResults (PegaPS-Work-ICM-Investigation-Initiate)* report definition, add the filter condition for the respective column.
3. Open the **SearchInvestigationTable (PegaPS-Data-Portal)** section. Open the table properties and pass the search text to the newly added parameter of the data page.
4. To show the new field in the results, add the new column to the table in the section with the property.

Adding field in the search results

You can search the investigations in the system by using basic information such as date range, investigation ID, category, and so on.

To add a field in the search results, complete the following steps.

1. On the **Query** tab of the InvestigationList (*PegaPS-Work-ICM-Investigation-Initiate*) report definition, add the column to display in results.
2. Open the SearchResults (*PegaPS-Data-ICM-Investigation*) section. Add a column to the table and set it to the property to retrieve from the report definition.

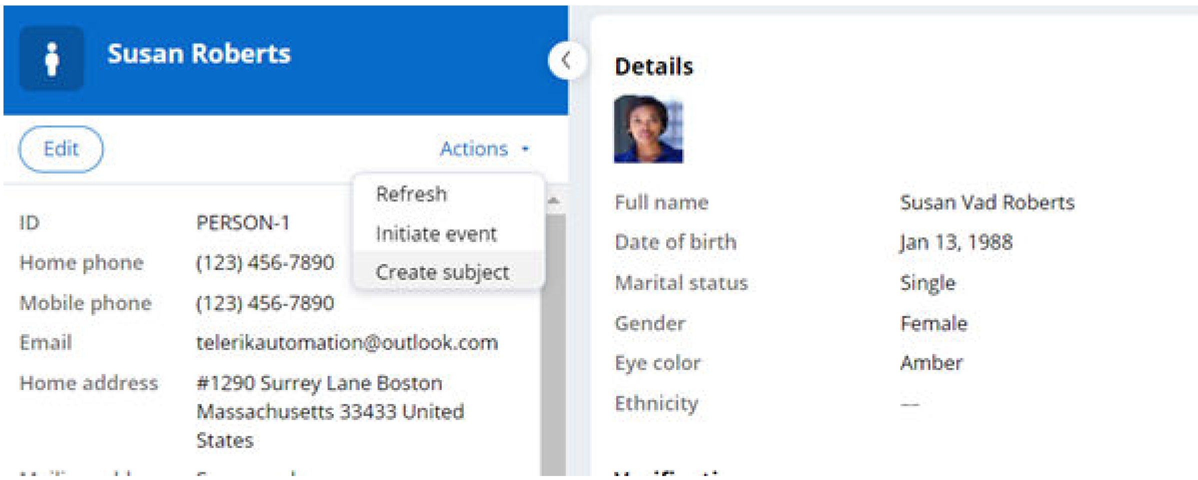
Setting up an email listener for investigation acceptance in an implementation layer

To configure an email listener in an implementation layer for the acceptance of investigation through email, complete the following steps.

1. Create an email account.
    a. Click **Records** > **Integration-Resources**, and then click **Email Account**.
    b. Save as the *PegaPS-Work-ICM-Investigation-Initiate* email account to the implementation class of the investigation, for example, *PegaPS-ICMImpl-Work-ICM-Investigation-Initiate*.
    c. Update the email address as necessary in the sender section and the receiver section.
2. Save as the ICMInvestigationListener operator and change the access group to the administrator access group of the implementation application.
3. Configure an email listener.
    a. Click **Records** > **Integration-Resources**, and then click **Email Listener**.
    b. Save as the InvestigationAcceptEmailListener listener, for example, InvestigationAcceptEmailImpl.
    c. In the email account section of the listener, update it to the email account that was created in step 1, for example, *PegaPS-ICMImpl-Work-ICM-Investigation-Initiate*.
    d. Save as the service package (*InvestigationEmailDefault*) and change the access group to the administrator access group of the implementation application.
    e. Update the service package in the **Listener properties** section of the email listener.
    f. Update the service class to the Request access class of the implementation application, for example, *PegaPS-ICMImpl-Work-ICM-Investigation-Initiate*.

Subject case

An investigator can add a new subject (which can be an entity, such as a person, business, vehicle, or facility) by creating a subject directly from the investigation or by creating a standalone subject and later associating it with an investigation. You can also create a new subject from the context of entities (Such as Person, Business, Facility and Vehicle) and that entity will get associated to the subject.



Create subject

To use the Subject case in the implementation layer, save as the D_Subject data page in the implementation layer and update the lookup with the implementation class name in the source.

Adding a field to the existing subject details form

To capture more details when adding a subject to the system, complete the following steps.

Add a new subject type.

a. Add the new entity type as a record in the option map and set the **Field name/ Group** value as EntityType.
b. Save as the SetICMEntityClass data transform in the implementation layer.
c. Create a when rule, for example, IsPerson, and add another step for the new entity.

d. Update the .ICMEntity page to update the class with the new entity class name.
e. Save as the *ICMEntityDetails (PegaPS-Data-ICM-Entity)* section to the entity class and update it with the properties that need to be captured when creating the subject.
f. Open the *NewSubject (PegaPS-Data-Entity)* section and click the **Save as** button.
g. Save to the entity class and update it with the properties that you need to be capture when creating a new subject.
h. Update the Identification *(PegaPS-Work-ICM-Subject-Initiate)* section by adding the *SearchKnownSubject* section with the new entity page context.
i. Open the *SearchEntityCriteria* and *SelectKnownSubject (PegaPS-Data-Entity)* sections and click the **Save as** button.
j. For implementing the select existing feature, save the sections to the entity class.

View a subject

An Investigative Case Management user can view a list of subjects in the investigation case under Subjects.

An Investigative Case Management user can view a list of subjects in the investigation case under Subjects.

- To open the subject view page, click the **Name** link.
- To view the newly created entity details, create the *SubjectDetailsRO* view in the newly created entity class.

For more details, refer to *EntityDetails (PegaPS-Work-ICM-Subject-Initiate)* class.

Adding a search field for a subject

You can search for a subject in the system by using basic information such as Subject ID, Type, Role, and so on.

To add a search field, complete the following steps.

1. Open the *D_SearchSubjectResults* data page and the *SearchSubjectResults (PegaPS-Work-ICM-Subject-Initiate)* report definition. Add a parameter under the **Parameters** tab to both the rules.
2. On the Query tab of the *SearchSubjectResults (PegaPS-Work-ICM-Subject-Initiate)* report definition, add the filter condition for the respective column.
3. Open the *SearchSubjectTable (PegaPS-Data-Portal)* section. Open the table properties and pass the search text to the newly added parameter of the data page. If the new parameter does not display, reenter the data page name.
4. Add the new column to the table in the section with the property to show the new filed in the results.

Adding a field in the search results for a subject

To add a field in the search results for a subject, complete the following steps.

1. On the **Query** tab of the SearchSubjectList (*PegaPS-Work-ICM-Subject-Initiate*) report definition, add the column to display in results.
2. Open the SearchResults (*PegaPS-Data-ICM-Entity*) section. Add a column to the table and set it to the property to retrieve from the report definition.

Interview case

An Investigative Case Management user can conduct an interview for an investigation case or for a subject case by creating an interview directly from the investigation or subject.

Edit an interview by using the Edit interview feature, which you can use to add another participant, update the values that are captured, and so on.

Adding a field to an existing interview details form

When conducting an interview for an investigation case or for a subject, you must capture a certain number of details about the case or subject.

Assume that you need to capture one more field when adding an interview to the system. To add a field, complete the following steps:

1. Create the property in the *PegaPS-Data-Interview* class.
2. Add the newly created property to the InterviewInfo (*PegaPS-Data-Interview*) section.
3. Add a property to interview participants:
   a. Create the property in the *PegaPS-Data-Association* class.
   b. Add the newly created property to the *ParticipantsList (PegaPS-Data-Association)* section.
4. Add an interview template:
   a. Switch to App Studio and click the PGP wrench icon.
   b. Click **Interview templates** and add new template to the existing list.

Viewing an interview

An Investigative Case Management user can view an interview and the associated data that was collected during the interview.

1. Add the property to display in the InterviewInfoRO (*PegaPS-Data-Interview*) section. For information about adding a property, see Adding a field to the existing interview details form.
2. Update the InterviewList (*PegaPS-Data-Interview*) report definition to retrieve the property.

Extending the Interview case

The Interview case type can be extended to any other cases by completing the following steps.

1. Click Case types.
2. Click the vertical ellipsis, and then click **Open**.
3. Add the Interview case as a child case type.
4. Save your changes.

5. To show the list of interviews of a case type, include the *InterviewTab (PegaPs-Work)* section in the *pyCaseMainInner* section as a new tab.

Evidence case

As an Investigative Case Management user, add evidence for an investigation case by creating an evidence case directly from the investigation.

Extending evidence case

The Evidence case type can be extended to any other cases by completing the following steps.

1. Click **Case types**.
2. Click the vertical ellipsis and then select **Open**.
3. Add the Evidence case as a child case type.
4. Save your changes.
5. To show the list of evidences of a case type, include the *EvidenceTab (PegaPs-Work)* section in the *pyCaseMainInner* section as a new tab.

Capture item from evidence case

An Investigation Case Management user can capture the item details from the evidence case.

In evidence, only basic details of the item are captured using the Manage basic item component. In this component, item details are captured in a single screen. If you need to capture the full item details in a screen flow, then Manage Item component can be used.

To capture the item from evidence, Select the Capture Item check box in the first screen of evidence case and then item details will be captured in the next screen.

The details of the item captured will be displayed in the separate tab called Item in the evidence case. Also in the investigation case, under evidence tab, you can see the item in the separate column.

Configuring capture item details case designer

Configure the item basic details component in App Studio to use in a case type, as a step or an optional process, in a stage. You can use the item basic details component in case types that capture basic data related to the item.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click **App Studio**.
3. In the navigation pane of **App Studio**, click **Case types**.
4. In the **Case types** column, click evidence case type.
5. In the **Case life cycle** section, click **Stage** and enter a name for the stage in the text box.
6. Hover over Process, and then click **Step** > **More** > **Process** > **Manage basic item**.
7. Click **Select**.

Extending Evidence data

To extend Evidence data, complete the following steps.

1. In the Dev Studio **Explorer** panel, click **App**. In the search field, enter `PegaPS-Data-Evidence`.
2. Right-click the class and create a property for the information that you want to add, for example, Complaints.
3. Include the new property in the section.
   a. In the Application Explorer, find the *PegaPS-Data-Evidence* class.
   b. Click **User Interface** > **Section** > **EvidenceInfo**.
   c. Add the new property in the section.

4. Include the new property in the EvidenceRO section of the *PegaPS-Data-Evidence* class by repeating step 3.

Viewing evidence

An Investigative Case Management user can view evidence and the associated data that was collected for the evidence.

1. Add the property to display in the EvidenceInfoRO (*PegaPS-Data-Evidence*) section.
2. Update the EvidenceList (*PegaPS-Data-Evidence*) report definition to retrieve the property.

Manage associations

Use the Manage associations case to create or delete associations between entity types, such as Person, Business, Vehicle, Item, or Facility.

You can launch the Associations case from User Portal by performing either of the following actions:

- On Create menu, click Associations link.
- On Entity view screen or from case instance, in the Associations utility widget, click Gear icon.

- **Manage associations case architecture**
- **Association validations**
- **Adding a data element**
- **Adding an entity type**
- **Auditing an association**
- **Extend audit history for an association**
- **Extending Associations**

Manage associations case architecture

All associations are saved to and are retrieved from the Link database table (*PegaPS-Data-Link*). When associations are modified, the Link database table is also updated accordingly. The LinkedFromID is the primary ID from where the association is created for the first time. The LinkedToID is the ID to which the association is mapped.

LinkedToID is the ID to which the association is mapped. Associations are retrieved from the D_AssociationListDetails data page which inturn invokes D_AssociationList. The following are passed as parameters to the data page EntityID, EntityType and built-on application CSV.

- When Manage associations case is launched from the Entity view screen, the EntityID is the preset.
- When Manage associations case is launched from the User portal by using the Associations link on the Create menu, select Manage associations for field.

The D_AssociationList is sourced from the *PegaPS-Data-Link* (Link) database table by using the EntityAssociations report definition. This report definition excludes entries from the Link table that have pyMemo set as Associate, Bid, Branch, Experience, Reporter, or Training that represents associations for other widgets of the entity view that are skipped in the Manage associations case to avoid redundancy.

FetchAssociationListDetails (Code-Pega-List) is the response data transform that is run on D_AssociationList. This iterates through the results from the Link table and forms Primary.pxResults, which is of the *PegaPS-Data-Association*. This data transform has the logic to set the LinkedFromID, LinkedToID, LinkedClassFrom, LinkedClassTo, Role, IsReverseRole, and Entity Image data class fields, that are defined in the *PegaPS-Data-Association* class or its inheritance class to support associations.

Different categories of roles are maintained in the Option map (*PegaPS-Data-Config-OptionMap*) table, such as for example, PersonPerson, PersonBusiness, and

BusinessFacility. This table holds all of the possible roles between the Person to Person, Person to Business, and other associations.

Reverse roles are defined in the **AssociationsRoleMapping** and **ICMAssociationsRoleMapping** (*PegaPS-Data-Association*) decision tables for PGP and ICM layer. The **FetchAssociationListDetails** data transform uses this decision table to retrieve the reverse role if the associations are to be displayed in the context of the **LinkedToID** but not in the context from where the association is created.

Association validations

There are certain validations in place for the associations that you can create by using the Associations case.

- You can add a new person, vehicle, or facility to your system when you create an association but you cannot create a business, as creating this entity involves a review process.
- You can associate an entity or case with another entity type or case type, including its own type. For example, you can associate a person (Person-1) with another person (Person-2). You can also associate a person (Person-1) with a business (Business-1).
- You can associate an entity or case with another entity or a case more than once with the same role. However, it cannot have a similar association within the same time period. For example, you can associate a person (Person-1) with another person (Person-2) with role as “Driver” multiple times, but with a different time period.

  To update or add new validations, update the **CheckDuplicateAssociation** (*PegaPS-Work-Manage-Associate*) activity and the **ManageAllAssociations** (*PegaPS-Work-Manage-Associate*) validate rule.

  For all associations, the context from where the association is created for the first time is important for displaying the relationship or role of the association. For example, when you create an association with a person (Person-1) and a business

(Business-1) as "Employer," then in the context of Business-1, Person-1 has an association with Business-1 as an "Employee."

Adding a data element

If there is a requirement to capture a new data element, such as the association place, in addition to the relationship and the time period of the association, then complete the following steps.

1. Add a property to the *PegaPS-Data-Association* class, for example, Place.
2. Add a property to the *PegaPS-Data-Link* class, for example, Place.
3. Add a column to the database table that is mapped to the *PegaPS-Data-Link* class.
4. Fetch the property in the EntityAssociations report definition.
5. Add a mapping to the property in FetchAssociationListDetails.
6. Add the new property to the AssociationList (*PegaPS-Work-Manage-Associate*) section.
7. Add the new property to the SaveAllAssociaties (*PegaPS-Work-Manage-Associate*) activity and SaveLink (PegaPS) activity

Adding an entity type

The Manage associations case supports all five existing entity types, Person, Business, Facility, Vehicle, and Item in PGP and Investigation, Event, and Subject case types in ICM. If there is a requirement to include a new entity type (for example, Land) that was created in an application, then complete the following steps. Note: This example uses "Land" as the new entity type. The entity should be replaced whereever applicable with the new entity type that you are adding.

1. In the Option map (*PegaPS-Data-Config-OptionMap*) data type, in the field **FromAssocType**, add a new entry for Land.
2. In the Option map (*PegaPS-Data-Config-OptionMap*) data type, for the new field value **LandAssocType**, add entries for Person, Business, Facility, and Vehicle.
3. Flush **D_OptionMapList** data page and **D_PGPOptionMapList** for PGP, **D_ICMOptionMapList** for ICM.

4. Update the **D_EntityList** data page to add logic for land to fetch the list of Land details.
5. Update the **PreFromAssociateSearch** (*PegaPS-Work*) data transform to add logic for the new entity type. Refer to the existing steps added for a Person Entity in the **PreFromAssociateSearch** data transform and add steps in data transform for Land entity accordingly.
6. Create a **FromAssociateSearch** section for the new entity to add search criteria and results.
7. Update the **PreAddAllassociates** and **ResetAddAssociate** data transforms to add logic for Land. Refer to the existing steps added for a Person Entity in the data transforms and add steps for Land entity accordingly.
8. Create AssociateLand section and Update the AddAllAssociates section to include the AssociateLand section and add a visibility condition based on the AssociateType.
9. Create a data transform for initializing a new Land page, which is referenced when a new Land is created and added as an associate.
10. Create a new validate rule for validating Land Entity related fields and update ValidateAssociations validate rule to call the new validate rule.
11. Update PostAddAllAssociates activity to add logic for Land. Refer to the existing steps related to Person Entity and add the same for Land accordingly.
12. Update CheckduplicateAssociation activity to add logic for Land.
13. Update SaveAllAssociates activity to add logic for Land.

Auditing an association

Pega Government Platform provides support to Audit History for all the modifications done as part of an Association case. Below are the scenarios where case history is updated for Association case.

1. Adding new associations.
2. Modifying the existing association details like role, change in time period.
3. Removing the associations.

Extend audit history for an association

To extend audit history for a new field, update **PropertiesToCompare** (CL:*PegaPS-Data-Association*) data transform to set a new field.

For example, to add audit history for the new field 'Place', open the **PropertiesToCompare** data transform and add another step to set the new field 'Place'.

Extending Associations

Creating new associations from a case type

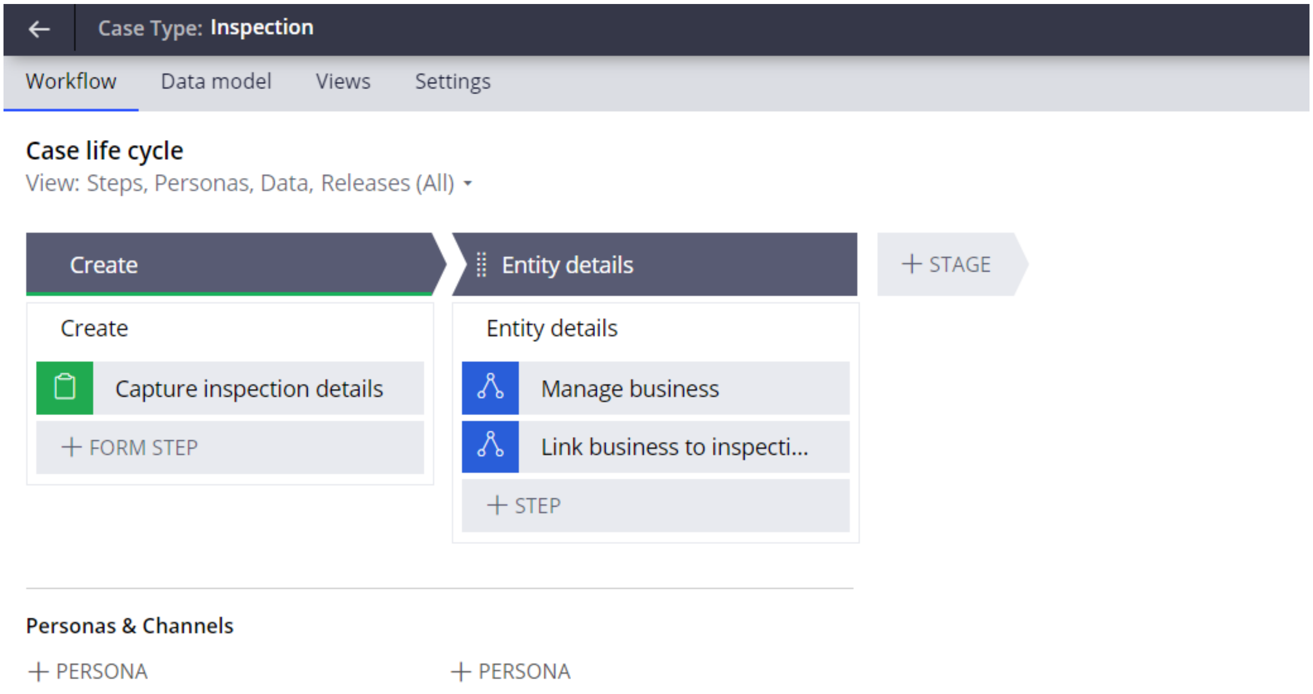
Follow these steps to create new associations from a case type:

- Use **PersistLink** flow from PGP to create new association from any case type.
- To add multiple associations in a case type, **SaveLink** activity can be used to loop through the list to create new associations.

For example, we have created a new **Inspection** case type in implementation layer and we want to capture the business details and associate the business to inspection case.

Implementation layer case type: Inspection

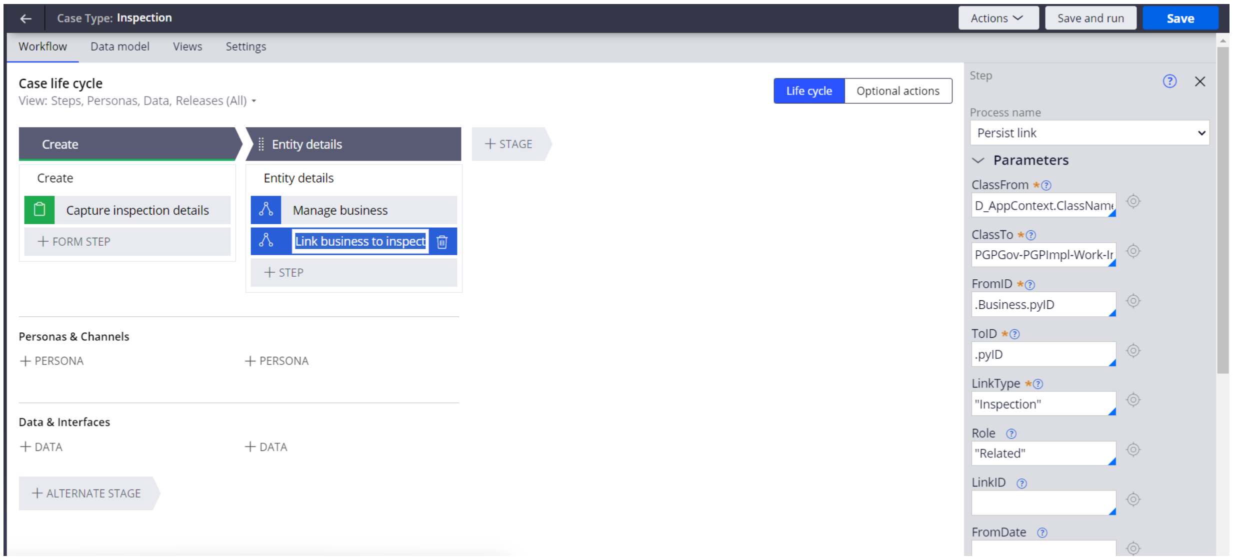
Implementation class : *PGPGov-PGPImpl-Work-Inspection*



Inspection case type

Implementation steps:

1. Add **PersistLink** flow as a step in the case type to associate the business to inspection case. This can be added from both Dev studio and App studio.
2. Provide all the required parameters such as association FromClass, ToClass, FromID, ToID, LinkType, and so on.

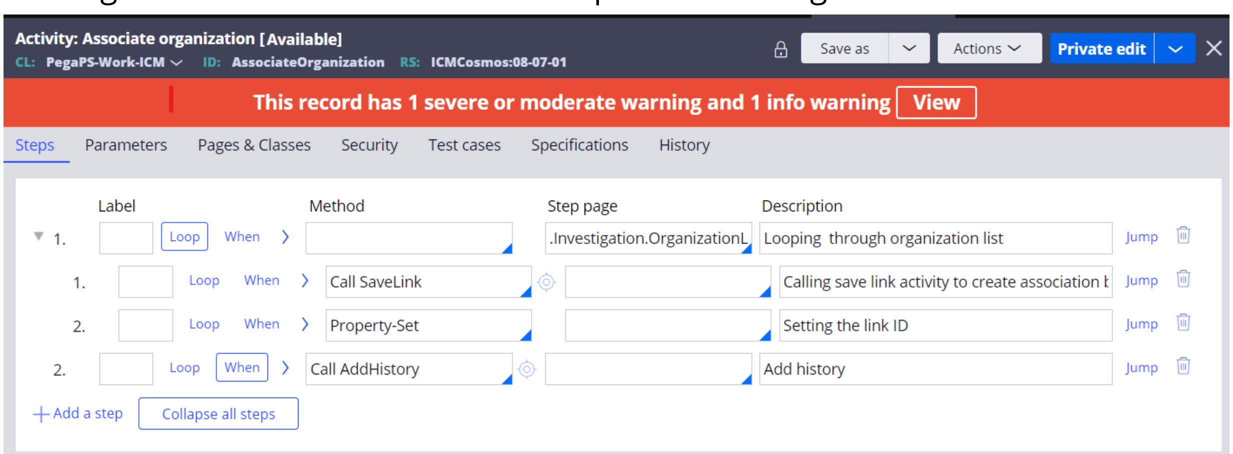


Entity details

3. After creating the inspection case and capturing business details, now we can see the association details in the Association widget.

   To add multiple associations, **SaveLink** activity can be used to loop through the list to create new associations.

   This can be implemented as shown in the below screenshots which references the investigation case use case to add multiple external organizations.



Insvestigation use case

- **Extending associations for a new case type**

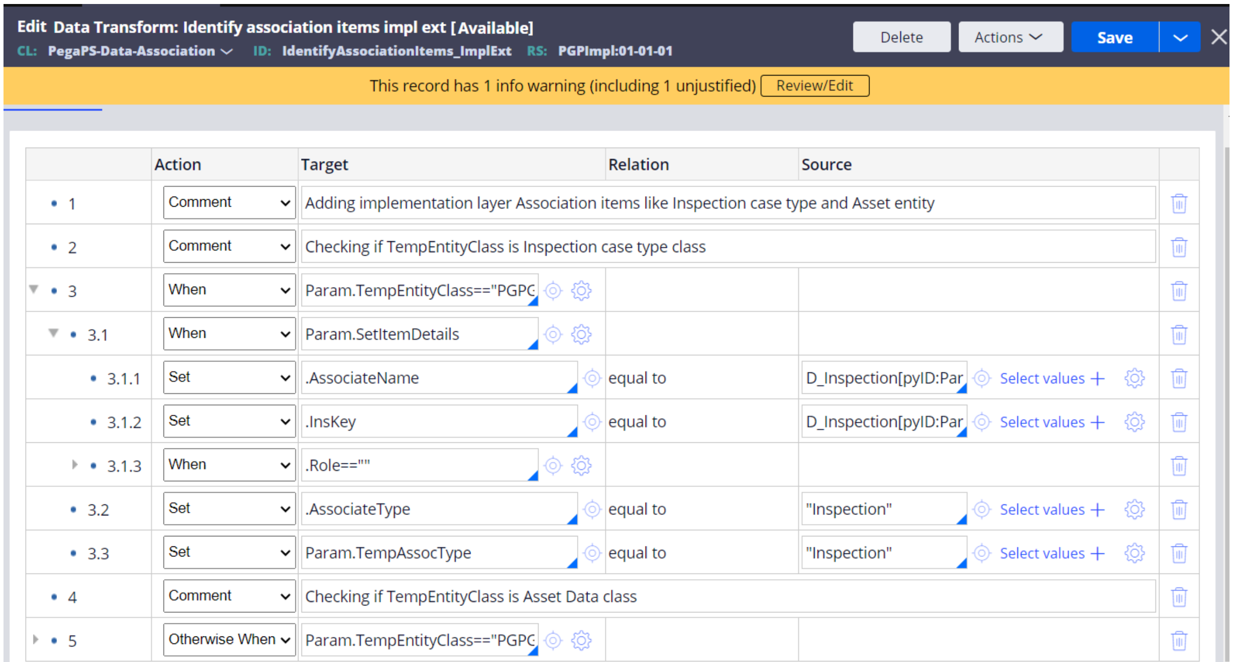
- Extending visualization for a new case type
- Extending associations for a new entity
- Extending visualization for a new entity

Extending associations for a new case type

Let’s say Inspection is a new case type created in implementation layer and we would like to extend the associations for this and display all the associations available for the case type.

Implementation steps:

1. Save as **pyCaseMainInner** section from **PegaPs-Work (RS: PGPCosmosOverride:08-06-01)** to your implementation layer work class for the respective case type i.e., **PGPGov-PGPImpl-Work-Inspection**.
2. Navigate to **Utils** region and click on **+ icon** on the region.
3. Click **Data display** and select **embedded** section.
4. From the section drop-down select **AssociationUtility** section and click **Submit**.
5. Once the embedded section is added, click on save.
6. Create Inspection case and add association.
7. Once the case is created and associated, you can see the association widget in the case utility panel with the association details.
8. In the association details in association widget and visualization, currently we will only see the case ID of the new case type.
9. An extension point is provided in the data transform IdentifyAssociationItems to add any additional properties.
10. To represent the label of the case type instead of ID in Association widget, create *IdentifyAssociationItems_ImplExt* data transform in *PegaPs-Data-Association* class in implementation layer ruleset and add the code to set few properties such as AssociateName, AssociateType, and so on.
    In this example for Inspection case type, we can set the properties as below



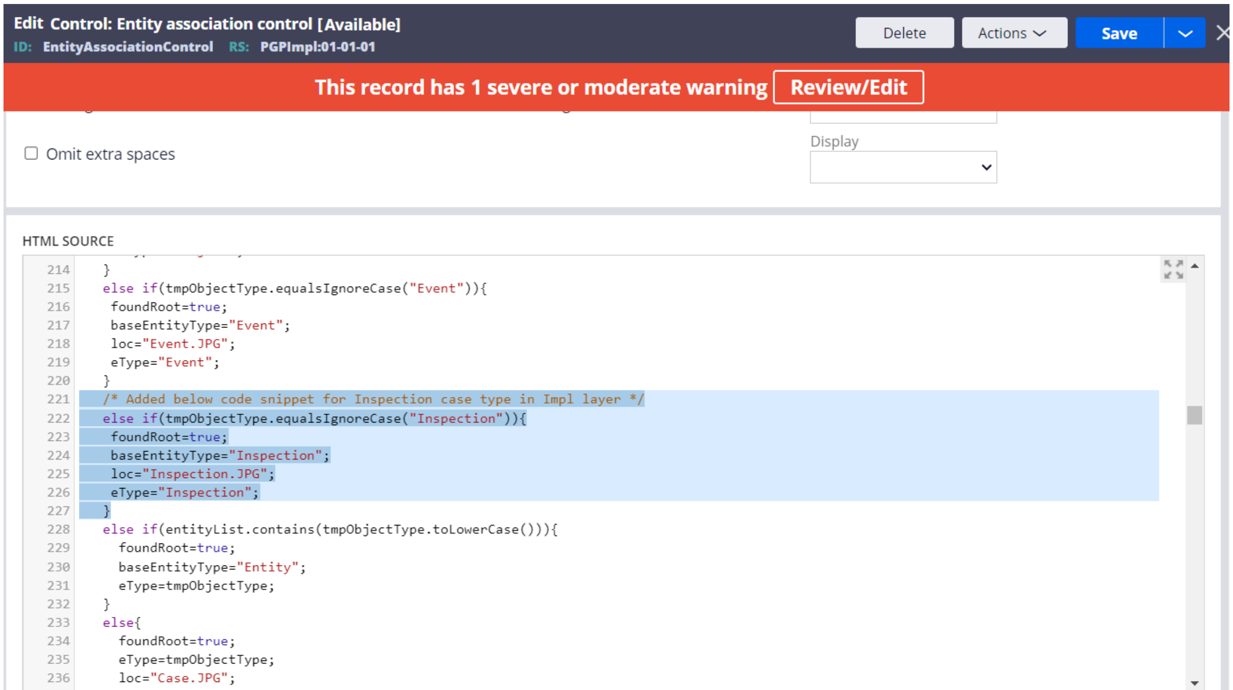
Extending associations

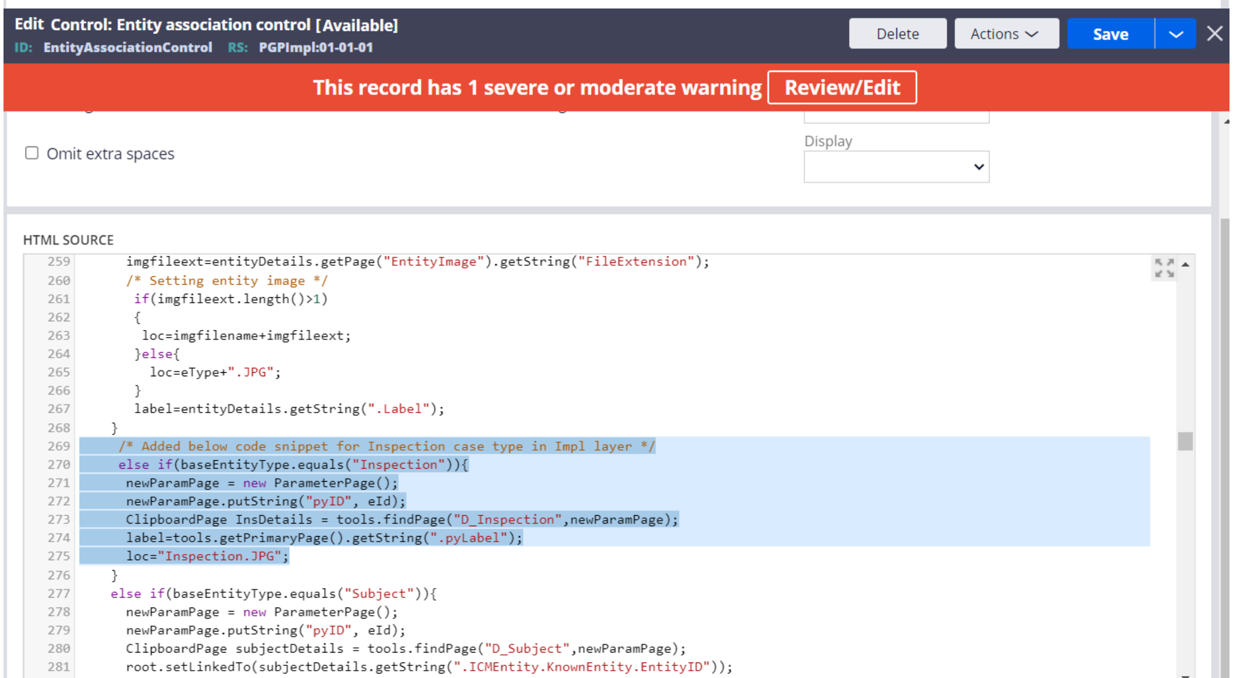
11. Create *IdentifyAssociationItems_ImplExt_Img* in implementation layer ruleset to add any image related properties.

Extending visualization for a new case type

To extend visualization for a new case type and display the custom image for case type and label in the visualization, follow the below implementation steps.

1. Create a custom image record in *Data-Content-Image* class for Inspection case type.
2. Save as the *EntityAssociationControl* rule into implementation layer and add the code for new case type created for setting the custom image and label. In this case for inspection case type, add the code snippets.

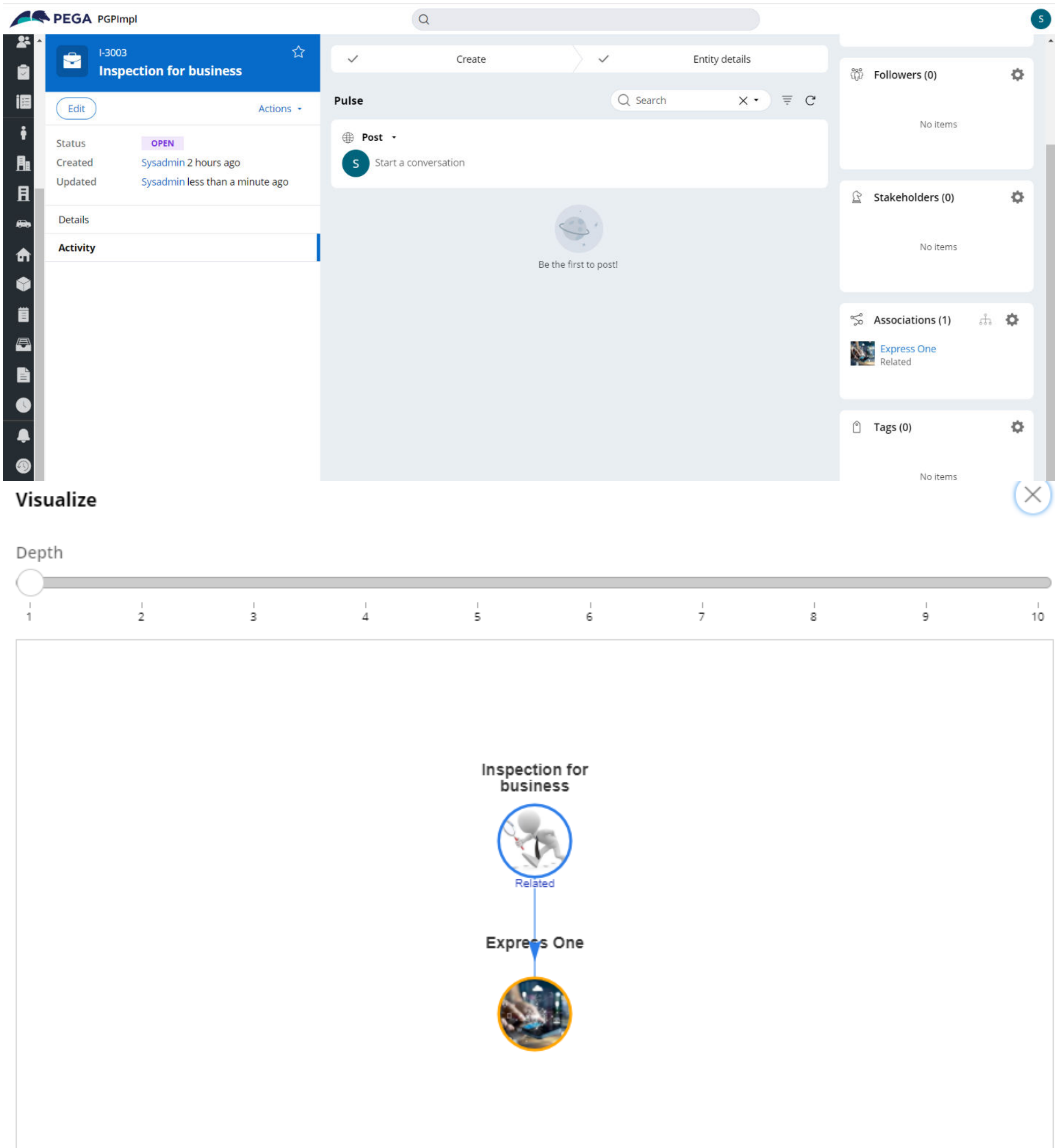




Entity association control

Entity association control

3. Once the above snippets are added, we can see the image and label in association visualization.



Visualize

Association visualization

Extending associations for a new entity

Let's say Asset is a new Entity created in implementation layer and we would like to extend the associations for this and display all the associations available.

To introduce a new entity, follow the steps mentioned in Creating new entities.

The following are the implementation classes for **Asset** entity created in implementation layer:

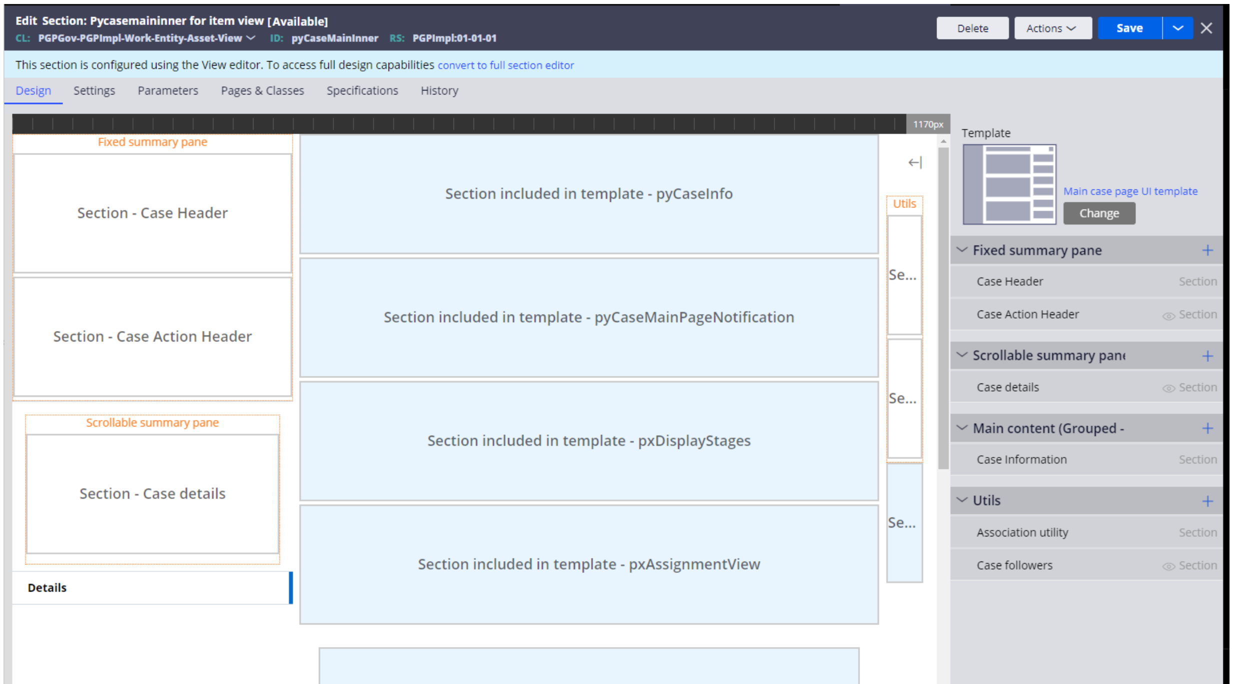
Data class - *PGPGov-PGPImpl-Data -Entity-Asset*

Work classes -

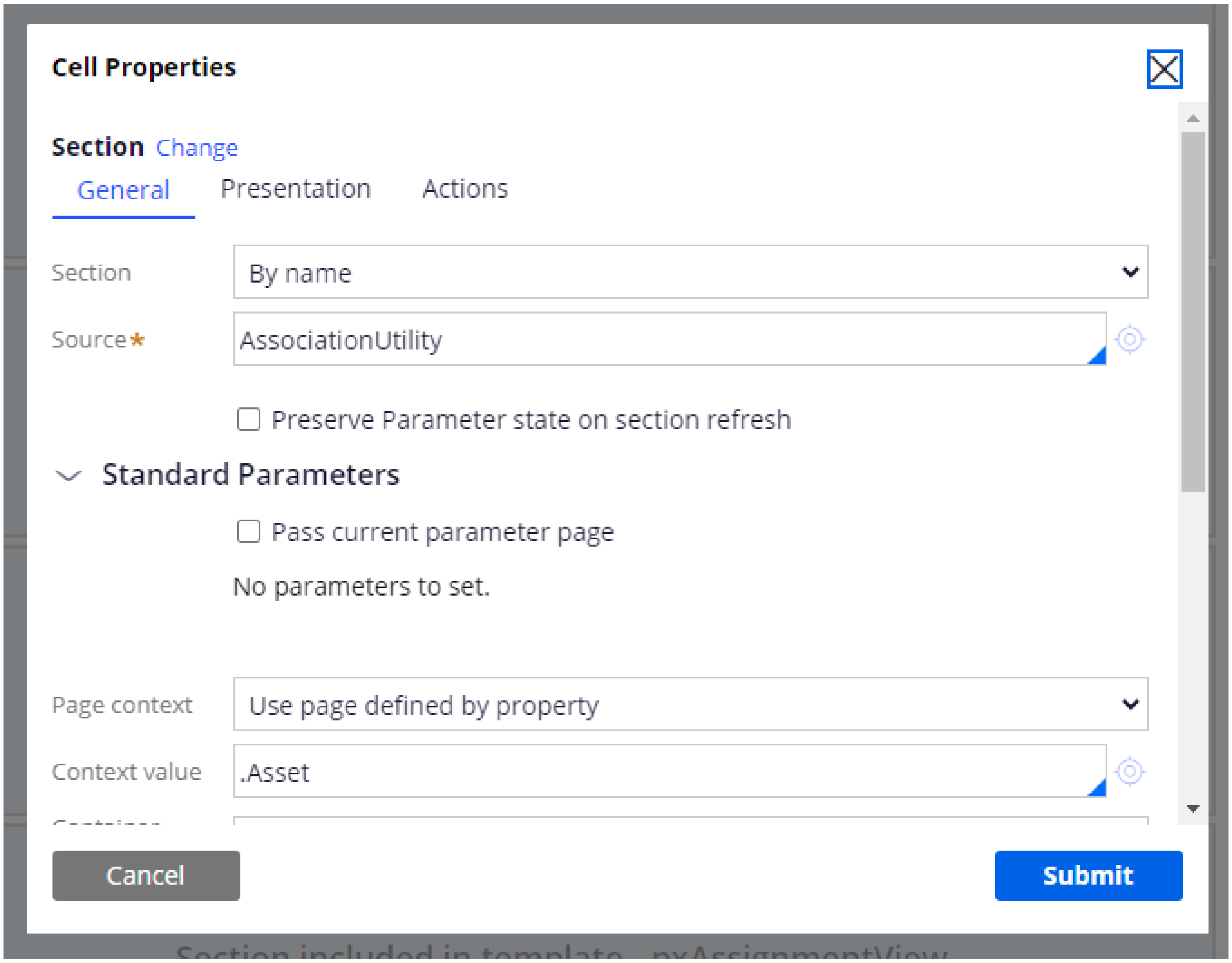
- *PGPGov-PGPImpl-Work-Entity-Asset-Add*
- *PGPGov-PGPImpl-Work-Entity-Asset-View*
- *PGPGov-PGPImpl-Work-Entity-Asset-Update*

Follow these steps to extend Associations for new entity:

1. Save as *pyCaseMainInner* section from *PegaPs-Work (RS: PGPCosmosOverride:08-06-01)* to your implementation layer work class for the respective case type i.e., *PGPGov-PGPImpl-Work-Entity-Asset-View*.
2. Navigate to **Utils** region and click on + icon on the region.
3. Click **Data display** and select embedded section.
4. From the section drop-down select **AssociationUtility** section and click **Submit**.
5. Provide the page context for the section as **.Asset**.
6. Once the embedded section is added, click **Save**.



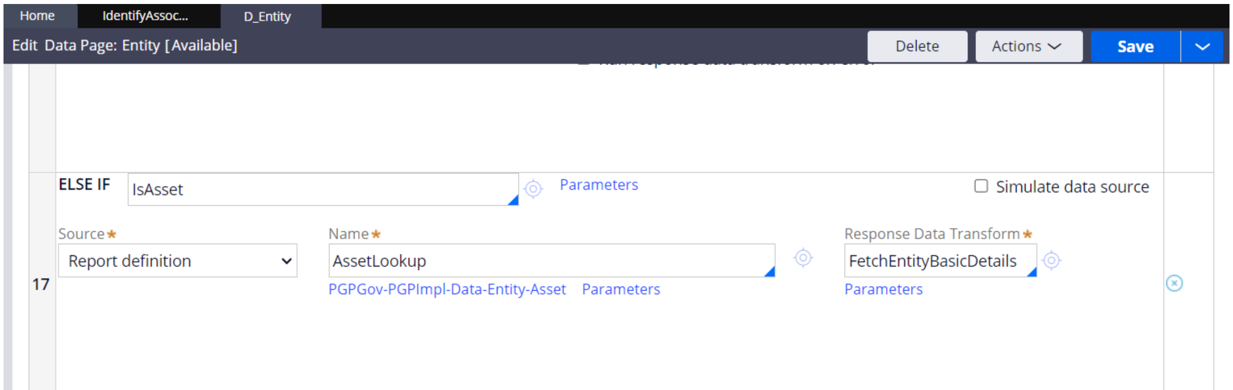
Edit Section: Pycasemaininner for item view [Available]
CL: PGPGov-PGPImpl-Work-Entity-Asset-View ID: pyCaseMainInner RS: PGPImpl:01-01-01
Delete
Actions
Save
This section is configured using the View editor. To access full design capabilities convert to full section editor
Design
Settings
Parameters
Pages & Classes
Specifications
History
1170px
Fixed summary pane
Section - Case Header
Section - Case Action Header
Scrollable summary pane
Section - Case details
Details
Section included in template - pyCaseInfo
Section included in template - pyCaseMainPageNotification
Section included in template - pxDisplayStages
Section included in template - pxAssignmentView
Utils
Se...
Se...
Se...
Template
Main case page UI template
Change
Fixed summary pane
Case Header
Section
Case Action Header
Section
Scrollable summary pane
Case details
Section
Main content (Grouped -
Case Information
Section
Utils
Association utility
Section
Case followers
Section



Cell properties

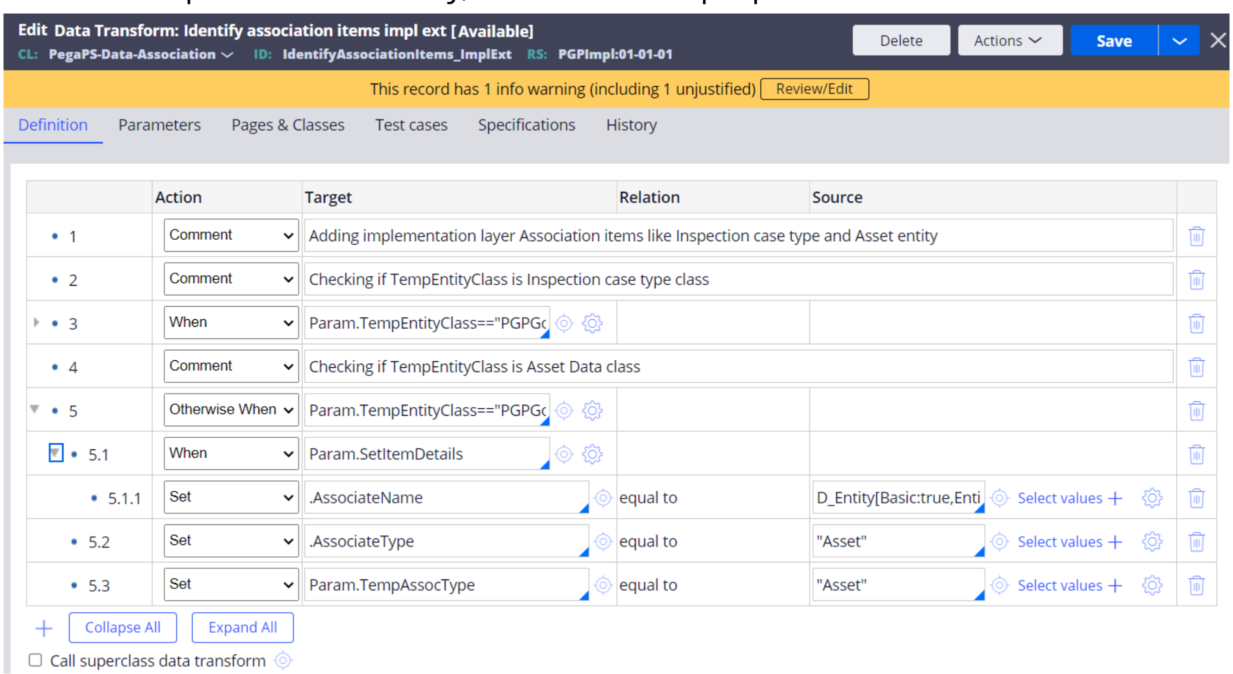
Extend associations

7. Once the Asset entity is created and associated, you can see the association widget in the utility panel with the association details. In this example, we are associating Asset entity with Item entity.
8. In the association details in association widget and visualization, currently Entity ID of the new entity will be displayed.
9. Extend **D_Entity** data page in the implementation layer and add the respective sources to fetch the Asset entity details. Refer Item entity implementation and follow the similar approach for Asset. Create all the report definitions and data transforms as required.



D_Entity data page

10. An extension point is provided in the data transform **IdentifyAssociationItems** to add any additional properties.
11. To represent the label of the Entity instead of ID in Association widget , create the *IdentifyAssociationItems_ImplExt* data transform in *PegaPs-Data-Association* class in implementation layer ruleset and add the code to set few properties such as AssociateName, AssociateType, and so on for the entity type asset.
    In this example for Asset entity, we can set the properties as below:



Asset entity

12. Create *IdentifyAssociationItems_ImplExt_Img* in implementation layer ruleset to add any image related properties.

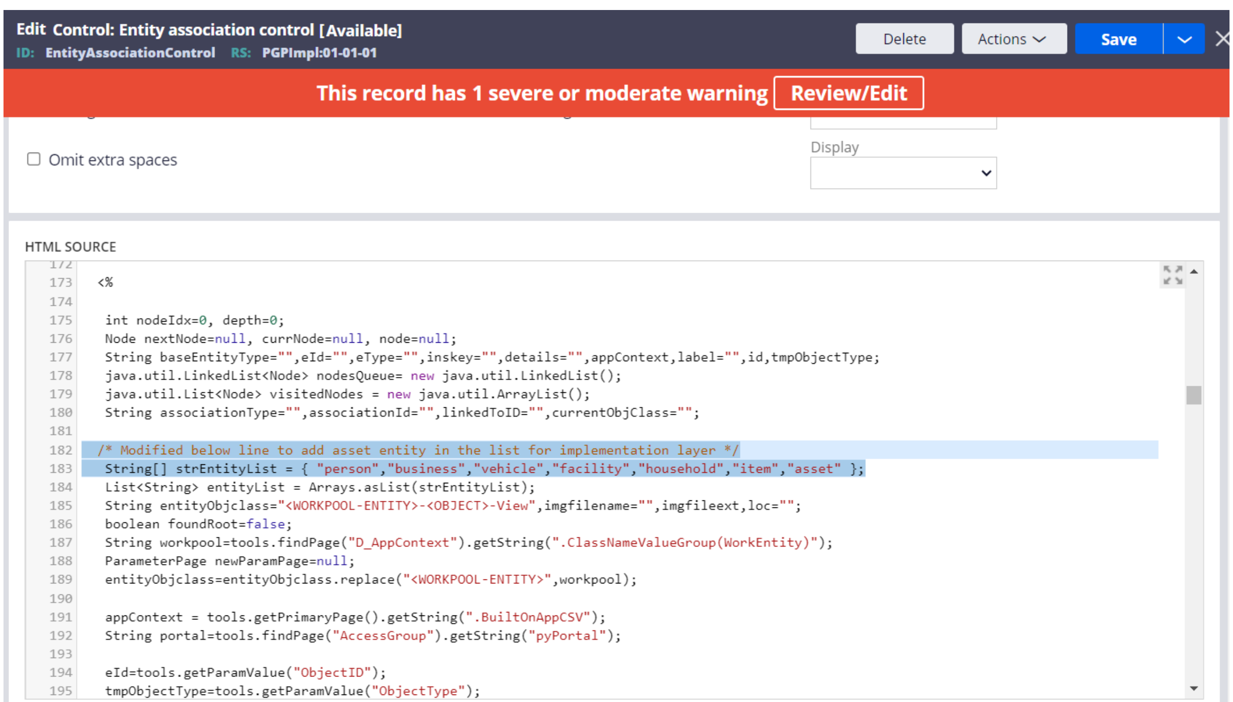
Extending visualization for a new entity

To extend visualization for a new entity and display the custom image for entity and label in the visualization, follow the below implementation steps.

Let's say **Asset** is a new Entity created in implementation layer.

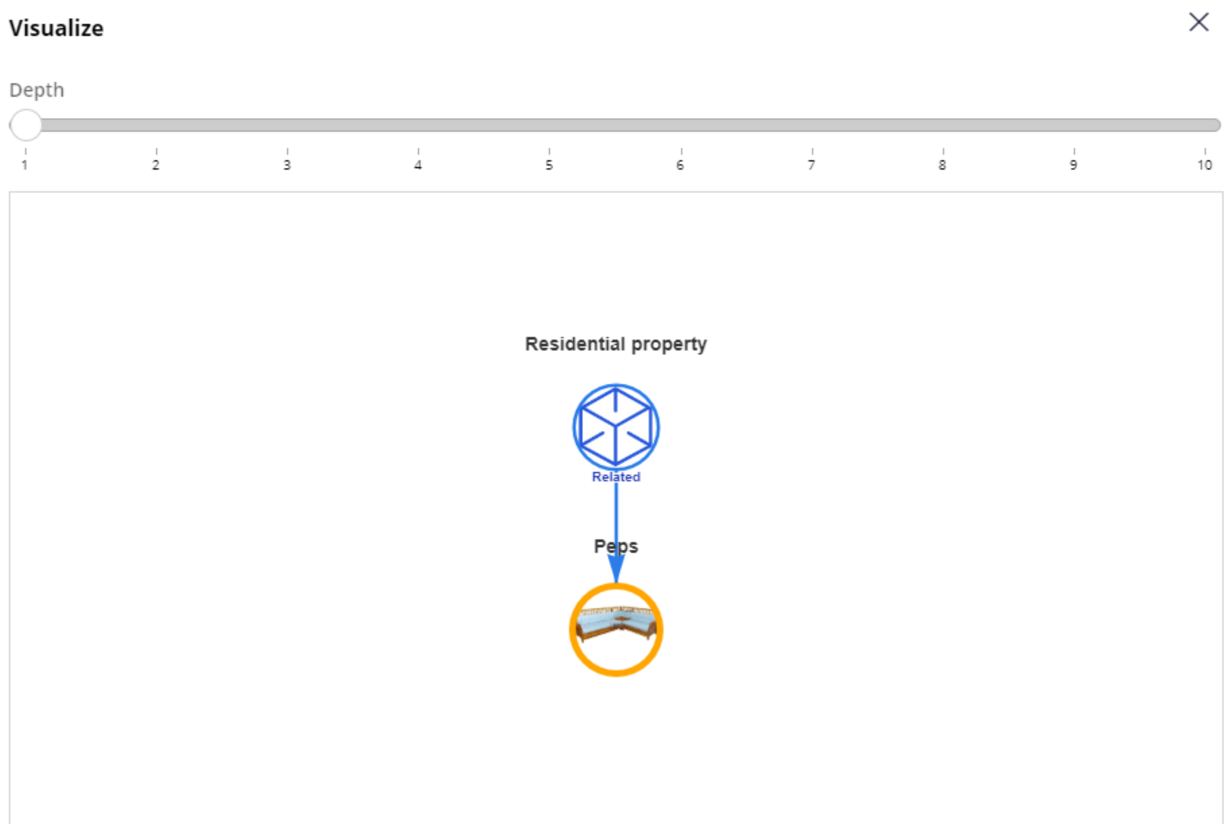
1. Create custom image record in **Data-Content-Image** class for Asset.
2. Save as the **EntityAssociationControl** rule into implementation layer and add the code for new entity.
3. In this case for Asset entity, add asset value to the **strEntityList**.

```
String[] strEntityList = { "person","business","vehicle","facility","household","item","asset" };
```



Extending visualization

4. Once the above code is added, we can see the image and label in association visualization.



Visualization

Application request

The application request case type enables you to apply for a program or any of its descendants, for example, a license. Using application request, you can bring all the services of your organization under one case type.

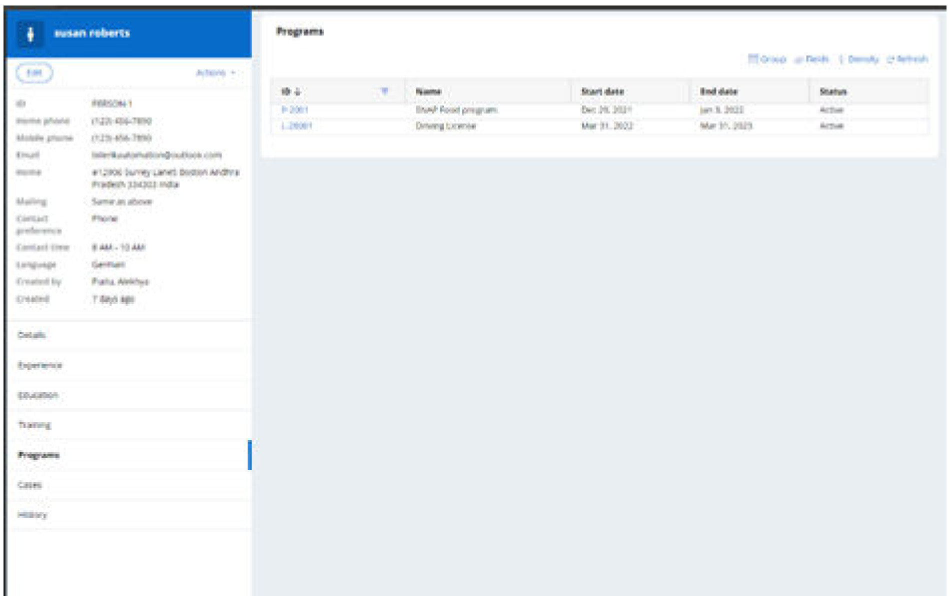
The application request case type allows business users to streamline application processes, such as capturing entity details, project details, document intake, consent agreement, and so on from start to finish. The business managers can review and approve the attached or uploaded documents, review the checklist, evaluate the process, and approve the application.

Users can select a license/program and review basic details, such as name, description, applicable for, category, subcategory, and so on including documents required and apply for the same. This feature is applicable for all the entities except household when selected through Application request. After a user applies for a license or program it is sent for review.

Application request

If the application is approved, an instance of license/program is created and these are listed in “Programs” tab of entity.

The following image shows programs/licenses of a person:

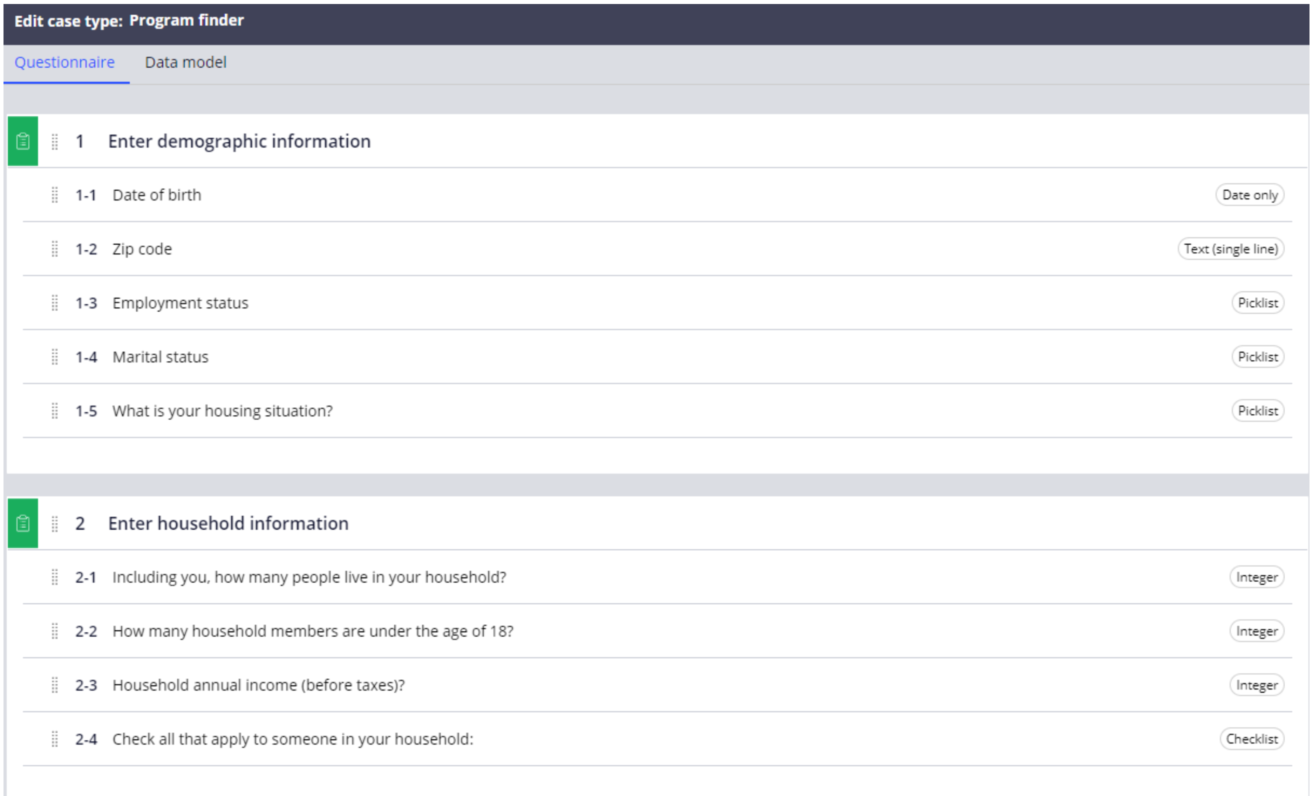


Programs tab

Program finder

In Pega Government Platform™, Program finder is a questionnaire case type which can be used as prescreening for the programs. This prescreening would help users in identifying the eligible programs and licenses they can apply for.

Program finder case in Pega Government Platform™ comes with set of sample questions, based on the responses provided to the questions, system displays the list of programs and licenses that user is eligible. Users can select from the eligible programs and apply for the same.



Program finder case type

Technical description

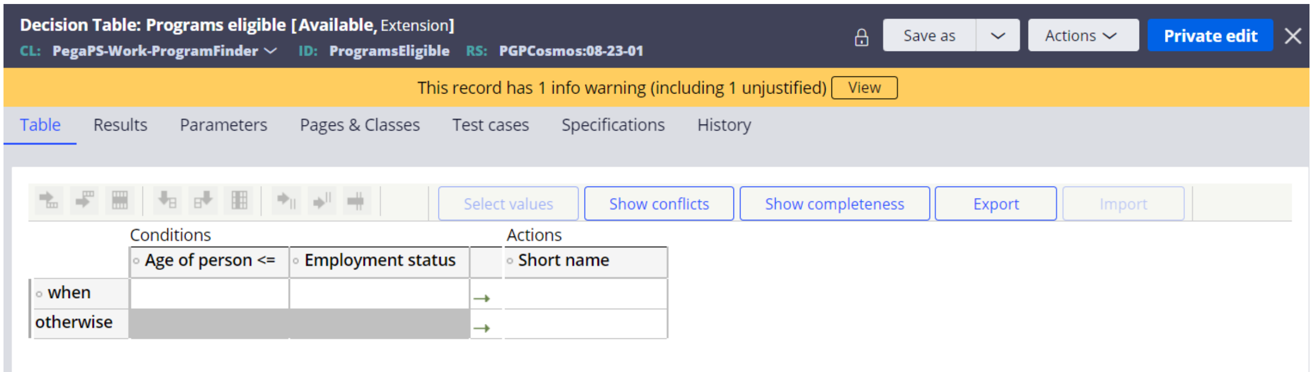
The following work class is used for Program finder case type in PGP.

PegaPS-Work-ProgramFinder

Extensions

A decision table named ProgramsEligible is introduced in program Finder case type to check the eligibility criteria based on the responses and display the eligible programs and licenses. This decision table is available as extension and can be customized as per the requirement. Currently from PGP, this decision table is shipped empty.

To extend this, save as this rule into implementation layer and add the conditions to decision table as per the requirement.



Decision table

Program finder questionnaire case type can also be customized and extended as per the requirement by adding additional questions and mapping the response fields. If required, the additional question related criteria should be added to the decision table as conditions to fetch the results.

Connecting system of record

In Pega Government platform, all the classes which requires a persistence are mapped to the tables in PegaDATA and the data gets persisted as instances of Data- classes. These tables also have a blob which can be leveraged when there are any embedded page or list properties to be persisted as part of the actual object.

Pega Government Platform also provides robust foundation to leverage data pages. Data pages help retrieve data that is stored in any external system required for the processing of case.

Using data pages separates the interface (i.e., the source of the data) from the data model in your system. For your implementation, you can leverage data pages and extend them to your layer. You can then change the data source to load the data from its system of record using REST, SOAP, and so on.

PGP application data model

The application provides a set of data types, data pages, and sample data, which you can use to begin implementing your application. You will need to use the data from your system of record instead of using the sample data provided by the application.

Data modeling involves creating a conceptual model of how data items relate to each other in an application. In Pega Platform, the data model refers to a set of rules that work together to populate the data in your application. The system displays this data to help you process the information and can help you make decisions in your sales processes. The following rule types constitute your data model:

Data types

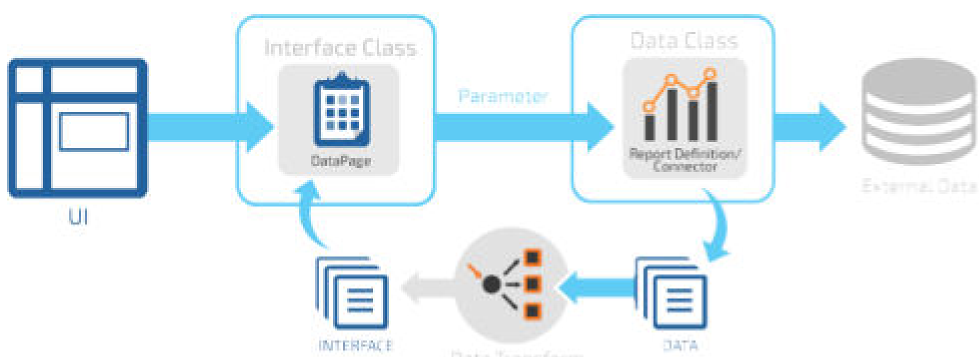
Data type is a class in your application that holds data used by the application. It consits of one or more data pages and multiple property definitions.

Properties

Properties define the format and visual presentation of data in your application.

Data pages

Data pages define the content of a clipboard page. Data pages also control the loading of that data from a source system, as shown in the following figure.



When planning your data model, work with the data modeling resource at your site to understand the attributes of the data types that need to be supported by your application.

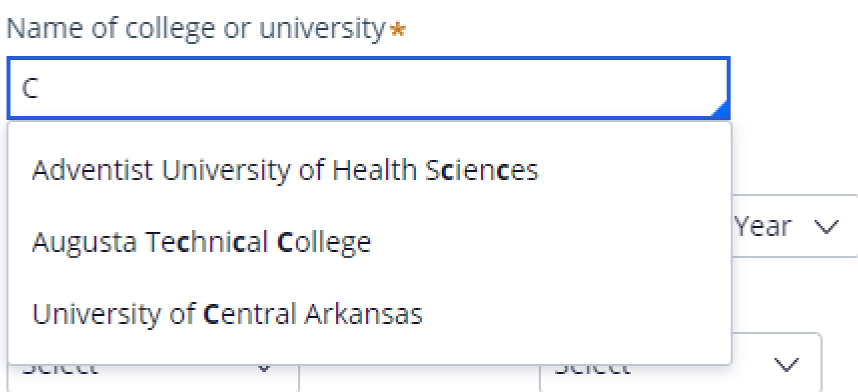
Managing reference data

Manage reference data in cases and applications.

- **Option map feature**
- **Architecture**
- **Using Option map data in a picker control**

Option map feature

The Pega Government Platform (PGP) Option map is a pattern for supplying customizable, configurable data collections to Pega *Picker* user interface selection controls like *pxAutoComplete* and *pxDropdown* list.



Education Autocomplete

The following are the benefits of this pattern:

- Instances can be managed from App Studio using the Data Type Record Editor in support of the low-code/no-code developer.
- Value display order can be explicitly controlled (not just alphabetical).
- The solution scales from a few instances to thousands of instances.
- The solution is localizable.

- The data instances are supplied by a parameterized data page can be used as a source in many data driven use cases.
- The data page is loaded by a data transform that may be customized in an implementation layer.

Architecture

Building blocks of the option map feature.

The option map consists of three basic elements.

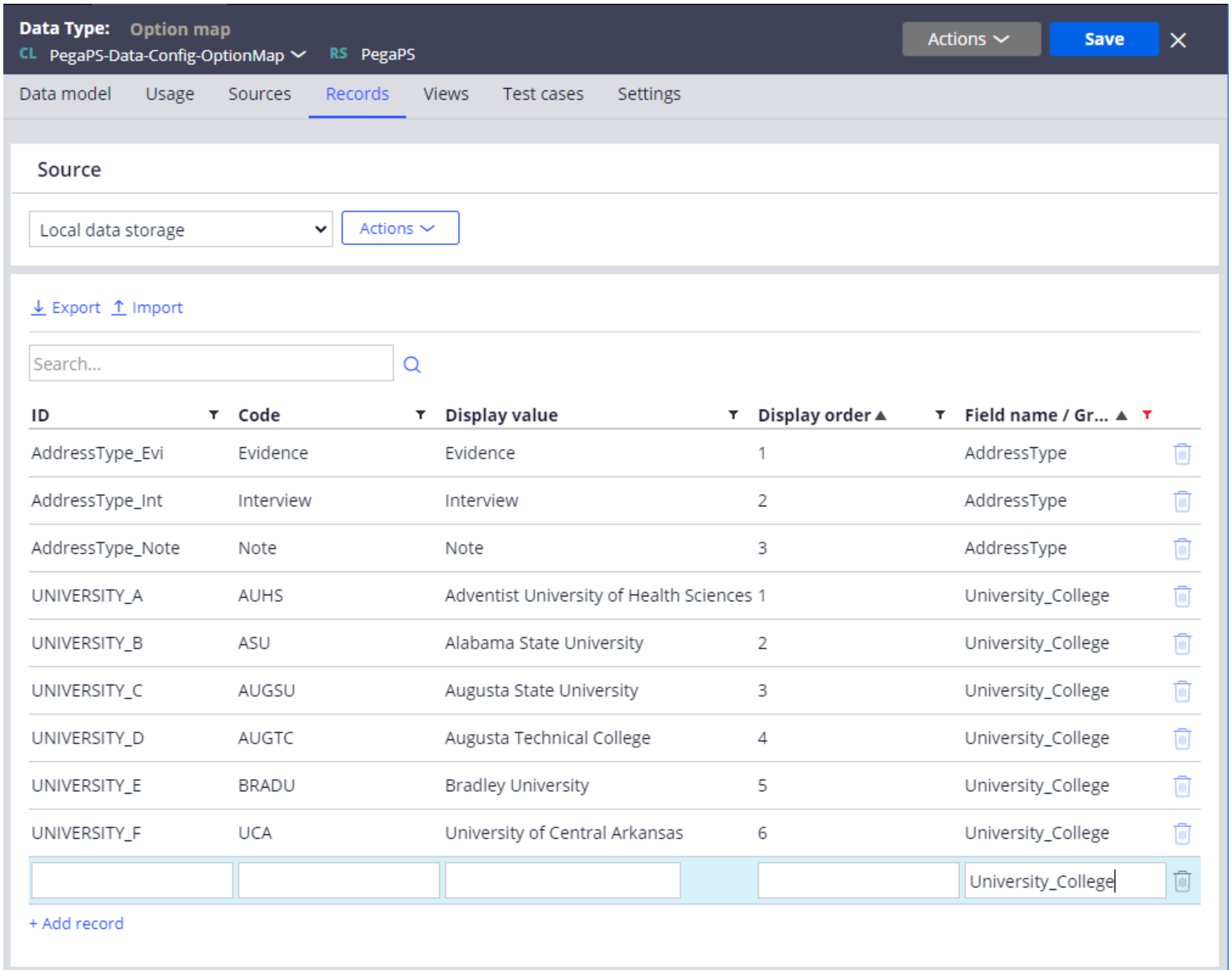
- A Pega local data type that holds the collections of name-value pairs grouped by field name group.
- An interface to manage the *OptionMap* data instances.
- A data page to retrieve collections of name-value pairs based on parameters.

Data type definition

Label	Property	Description
ID	.pyID	Unique Instance ID
Display Value	.pyLabel	Display Name
Code	.Code	Value
Display Order	.DisplayOrder	Integer index
Field Name / Group	.Purpose	Field Group (Category)

Option Map Data Management

The OptionMap data type is created under Pega's local Data Type Wizard and can fully leverage the App Studio Data Designer for instance management and record editing.



ID	Code	Display value	Display order	Field name / Gr...
AddressType_Evi	Evidence	Evidence	1	AddressType
AddressType_Int	Interview	Interview	2	AddressType
AddressType_Note	Note	Note	3	AddressType
UNIVERSITY_A	AUHS	Adventist University of Health Sciences	1	University_College
UNIVERSITY_B	ASU	Alabama State University	2	University_College
UNIVERSITY_C	AUGSU	Augusta State University	3	University_College
UNIVERSITY_D	AUGTC	Augusta Technical College	4	University_College
UNIVERSITY_E	BRADU	Bradley University	5	University_College
UNIVERSITY_F	UCA	University of Central Arkansas	6	University_College
				University_College

Option map data type record editor

D_OptionMapList Data Page

The D_OptionMapList is a Requestor scoped data page that takes two parameters.

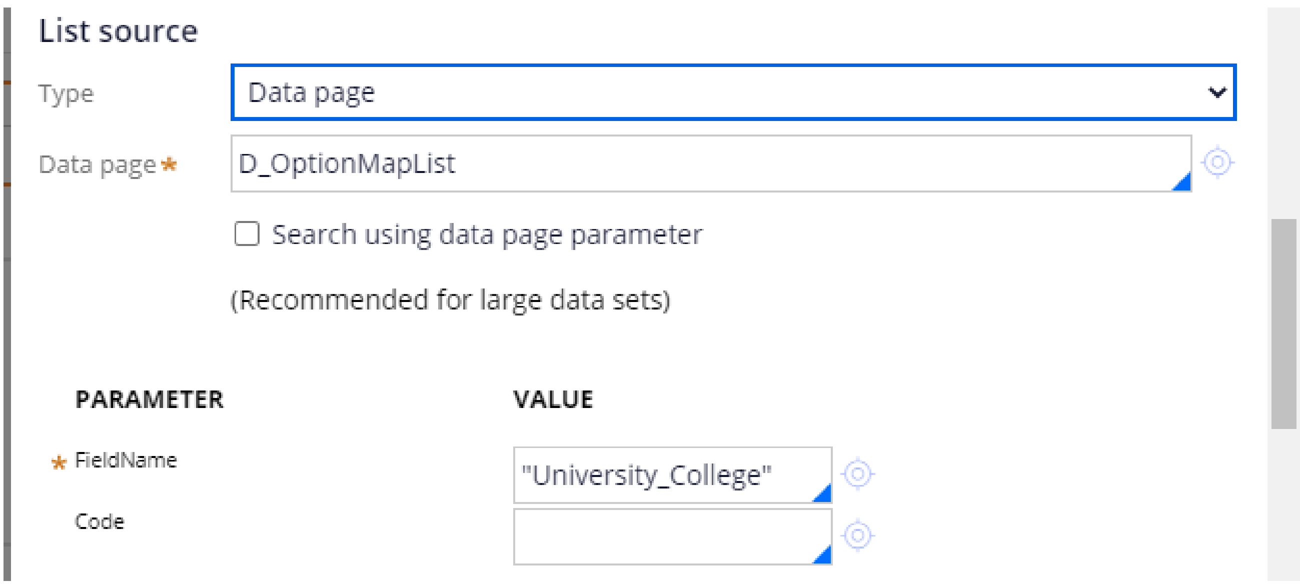
- FieldName (required) which supplies the label common to a collection of OptionMap instances.
- Code (optional) which may be provided in special circumstances to retrieve a specific OptionMap instance.

LoadOptionMapList Data Transform

The D_OptionMapList data page is populated by the LoadOptionMapList data transform which may be superseded or overridden in an implementation layer should detailed control of the list be required.

Using Option map data in a picker control

Utilize the option map data in a Pega UI picker control. Configure list source to call the *D_OptionMapList* data page passing parameters to identify the field name or group that identifies the collection instances to be loaded.



Option map auto complete list source

PGP entities

Pega Government Platform (PGP) includes a collection of common government data structures that you can use to collect and persist data in your application. Each entity contains a hierarchy of common scalar properties, embedded page or page list properties, and data instances related by association (foreign-key relationship).

- Person (PegaPS-Data-Entity-Person)
- Business (PegaPS-Data-Entity-Business)
- Vehicle (PegaPS-Data-Entity-Vehicle)
- Facility (PegaPS-Data-Entity-Facility)

- Household (PegaPS-Data-Entity-Household)
- Item (PegaPS-Data-Entity-Item)

Each Pega Government Platform entity data class has supporting case types to provide standardized data management operations on the persistent datastore.

Add
: Collect data and persist to database table.

Update
: Edit data and persist to database table.

View
: Present data that has been read from the database table.

Search
: Collect criteria and retrieve matching instances from database table.

- **Person entity**
- **Business entity**
- **Vehicle entity**
- **Household entity**
- **Facility entity**
- **Item entity**
- **Entity attachments**
- **Entity history and field audit**
- **Entity merge**
- **Creating new entities**

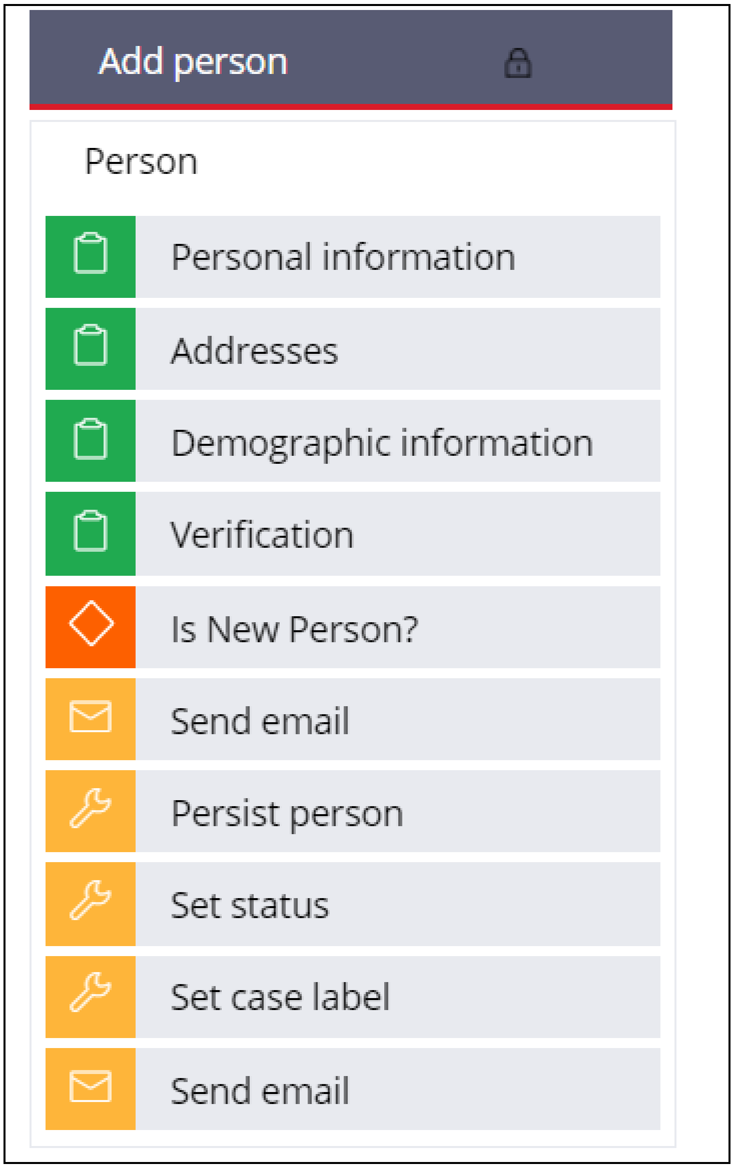
Person entity

Pega Government Platform(PGP) provides data support to collect data about people in the form of Person entity.

The Person entity feature contains a persistent datastore and three supporting case types to manage the Person entity datastore.

Add Person case type

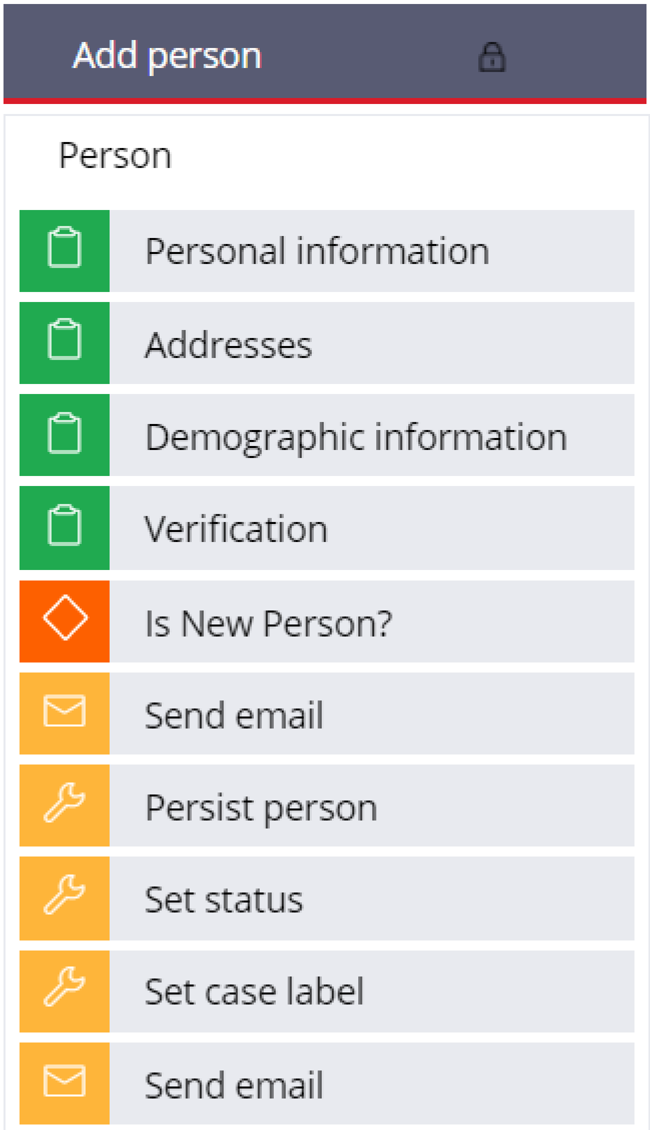
Add a person case type. Using the *PegaPS-Work-Entity-Person-Add* case type, you can introduce a new entity of the type Person into the system.



The Add Person case type checks for duplicate person entries and notifies about the same. The case type persists the person record along with the supported data like address, communication, communication preference, profile image, security questions, and so on.

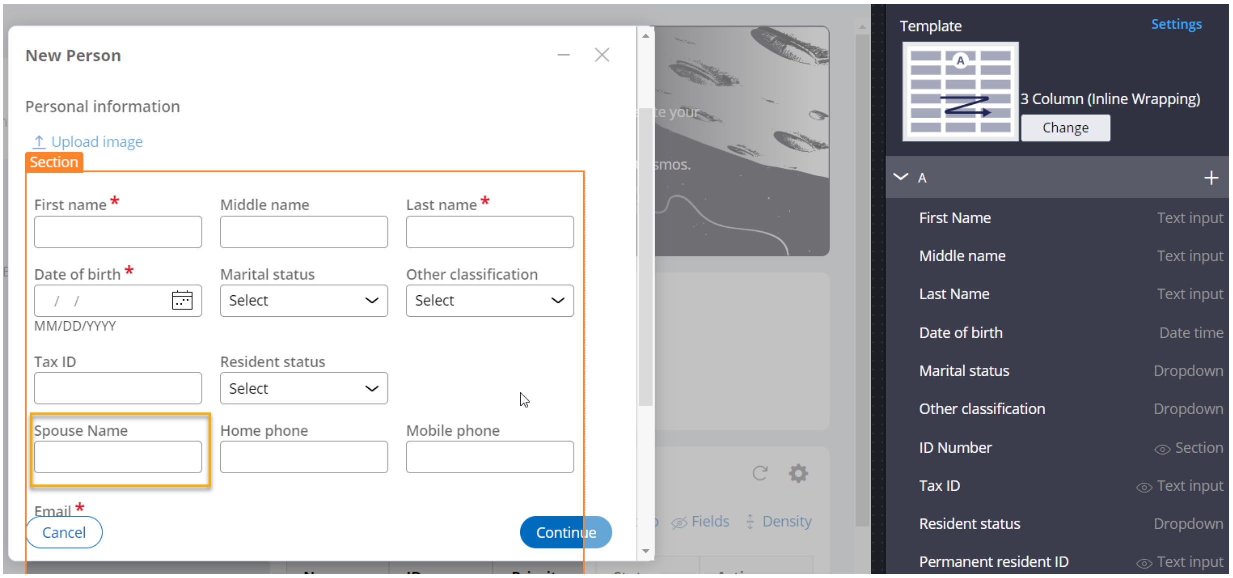
Adding a new field to the person intake screen

Capture a new field in the person intake screen. You can add a new data field or property and extend the existing person intake screen.



1. In the Person data type, create a field, for example, **Spouse Name**.
2. Run the Person case type, and then navigate to the **PersonBasicInfo** view.

3. Click the **Add** icon, and then add the new field.



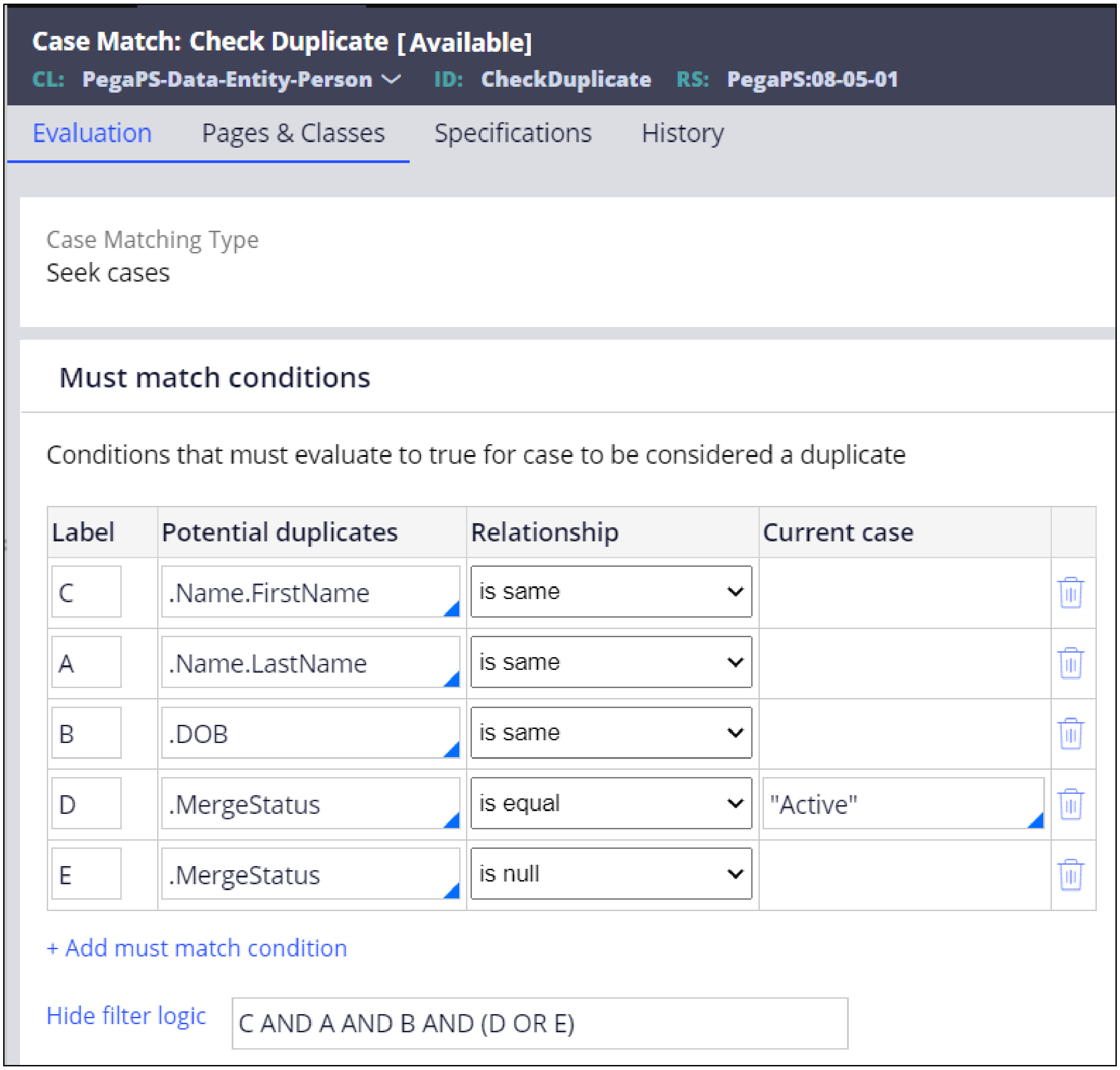
> **Result:**
>
> The new field is automatically saved in the person table.

Updating duplicate check validation for a field

Update the existing duplicate check fields with new fields.

1. Open the *CheckDuplicate (PegaPS-Data-Entity-Person)* case match rule.
2. Add a new field by clicking **Add must match condition**.

3. Update the filter logic accordingly.



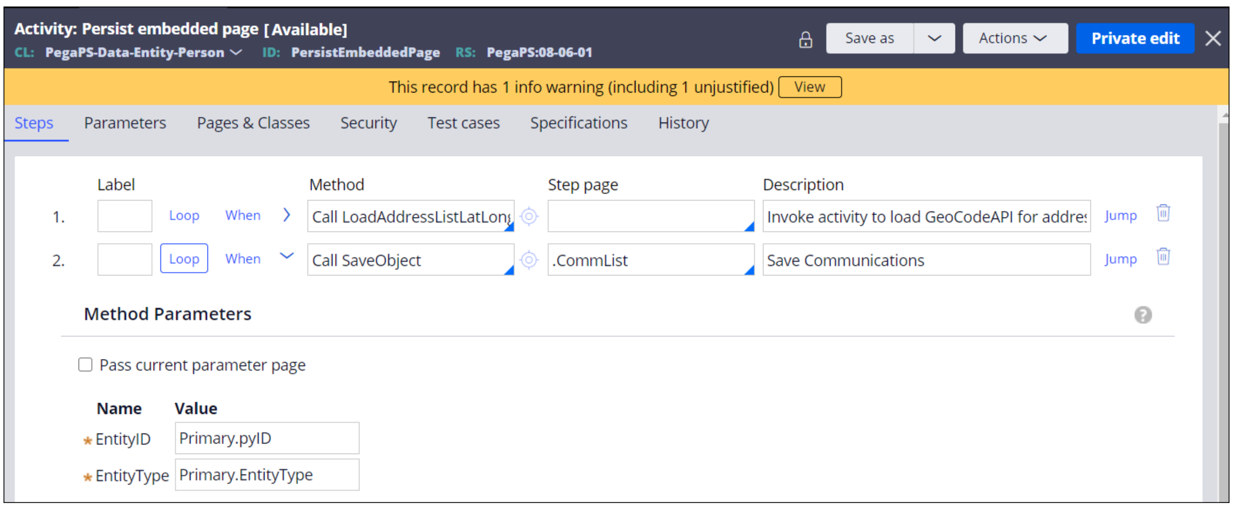
4. Click **Save as**.
5. In the **Context** section, select an application.
6. In the **Add to ruleset** area, select a ruleset and the ruleset version.
7. Click **Create and open**.

Adding a new list item

Update an existing list of items with new items.

Add a new list item, for example, GrantsList and persist it.

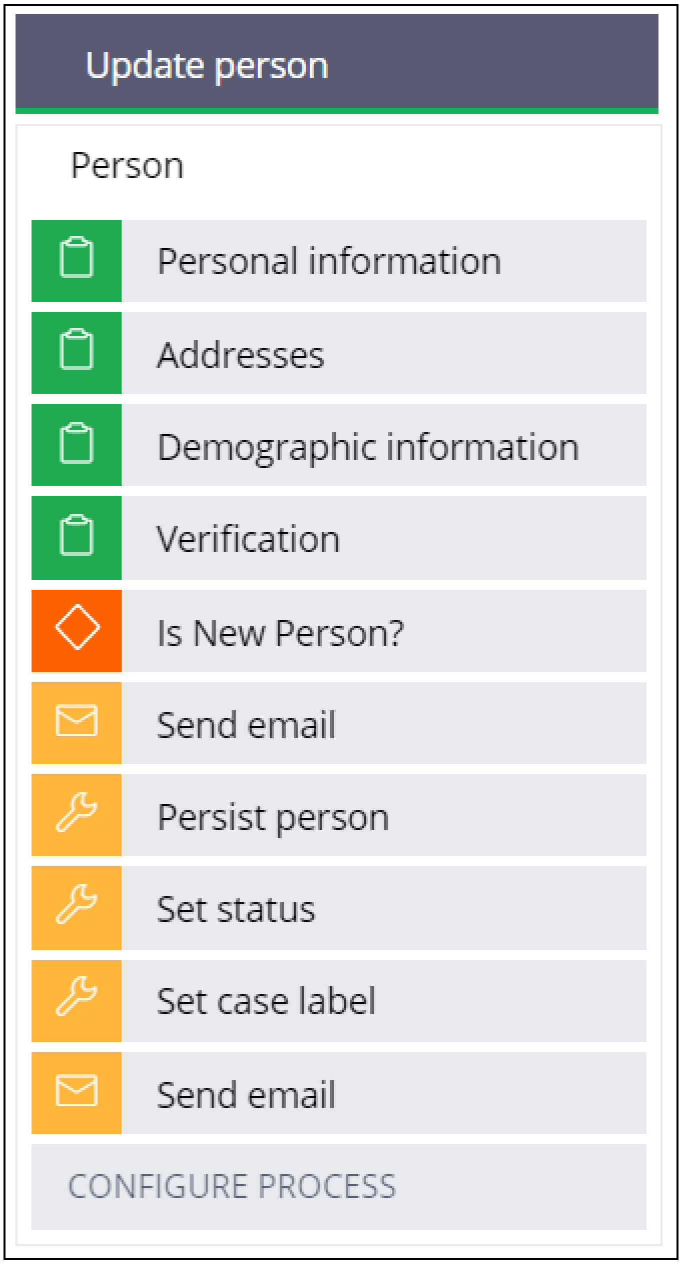
1. In Dev Studio, in the PegaDATA database, create the Grant data type with the following properties: *pyID* (Primary key), *EntityID*, and *EntityType*.
2. Add other properties that are related to the Grant, such as the grant name, expiry date, and so on.
3. In the Person data type (*PegaPS-Data-Entity-Person*), create a field of type page list of Grant data type class.
4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Person)* activity with a new step that loops the *GrantsList* property, and then invoke the activity *SaveObject* by passing the *EntityID* and *EntityType* parameters similar to *CommList*.



5. Create a UI to capture the Grant details.

Update Person case type

Update the existing *Person* case type. Using the *PegaPS-Work-Entity-Person-Update* case type, you can update the details of an existing entity.



You can make changes to the person data and submit them. The details persist after the duplicate validation check ensures that there are no duplicates.

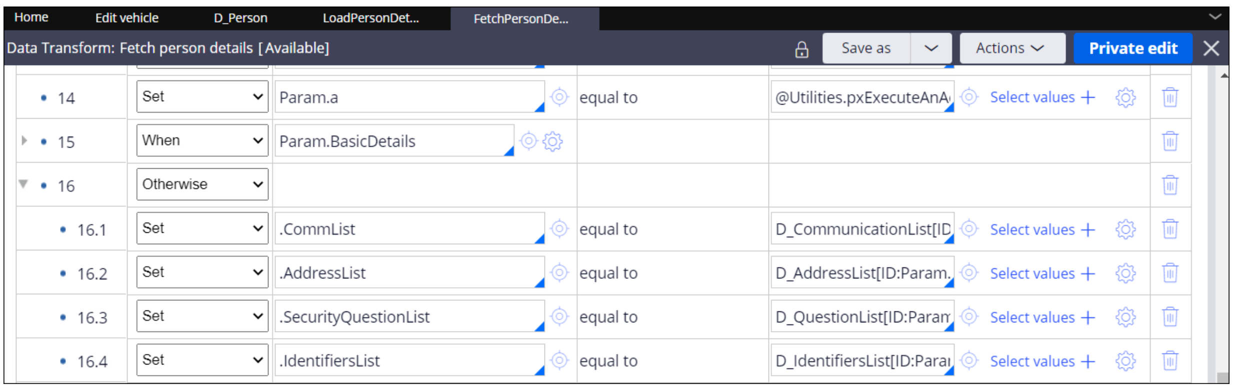
The *D_Person* data page fetches the entity details along with associated data like address, communication, and so on.

Updating an existing list property

Update an existing list property, for example, GrantsList.

You can update the existing list properties for the person entity. Fetch the grant details to update the existing list of grants that are captured as a part of the Add Person procedure.

1. Update the *FetchPersonDetails (PegaPS-Data-Entity-Person)* data transform.
2. Add a step similar to CommList or AddressList to set the details using the corresponding grant data page of type: List.

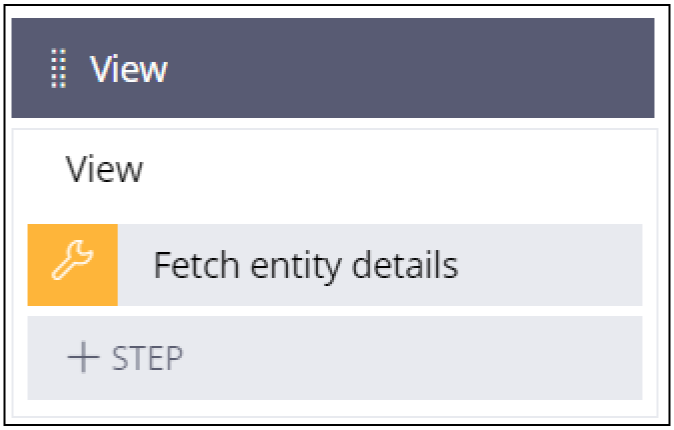


Result:

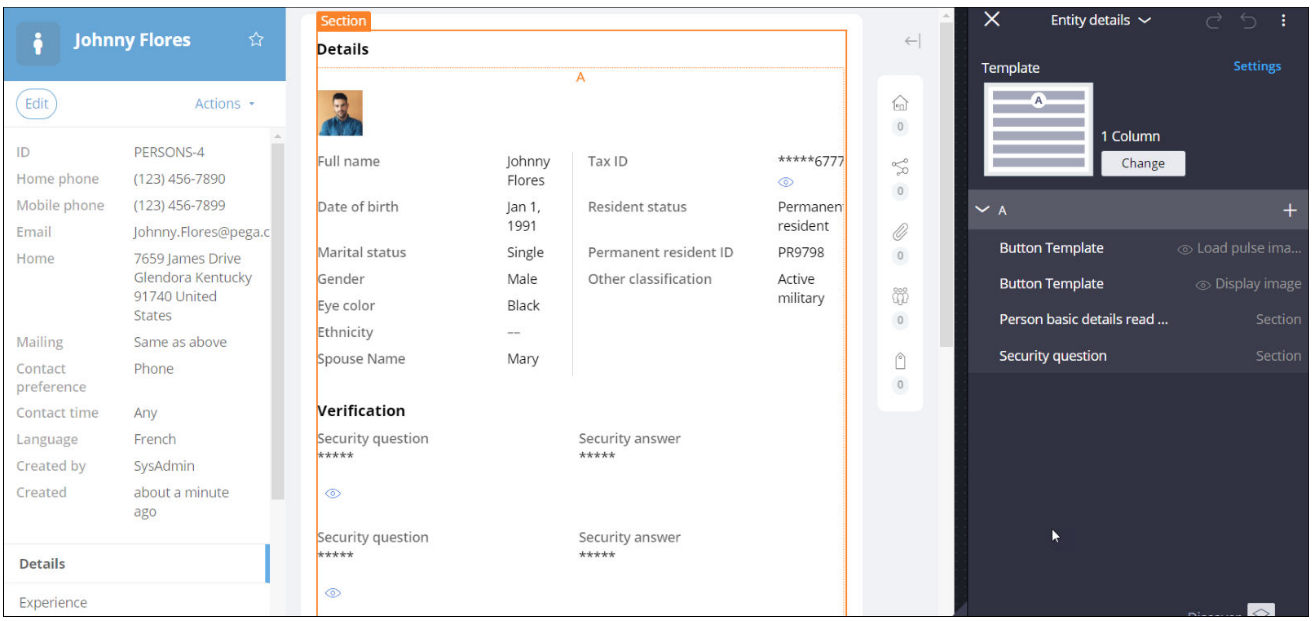
The Update case populates the details and any changes made are persisted.

View Person case type

View the details of a person entity. Using the *PegaPS-Work-Entity-Person-View* temporary case type, you can view the complete details of an existing person entity.



The *EntityDetails (PegaPS-Data-Entity-Person)* wrapper section contains all the person related views or sections.

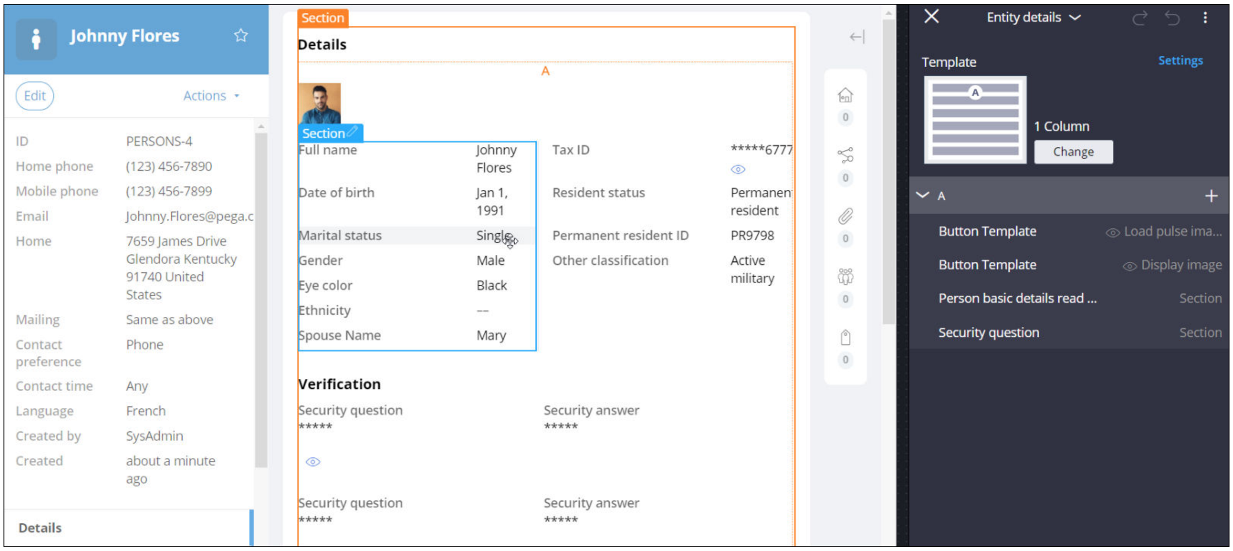


Adding a field to the person view

Add new fields to an existing person view.

Add a field, for example, Spouse Name to the person view.

1. To add the field, navigate to the *EntityDetails* wrapper section and choose the appropriate section to show the field, for example, the Entity details section.

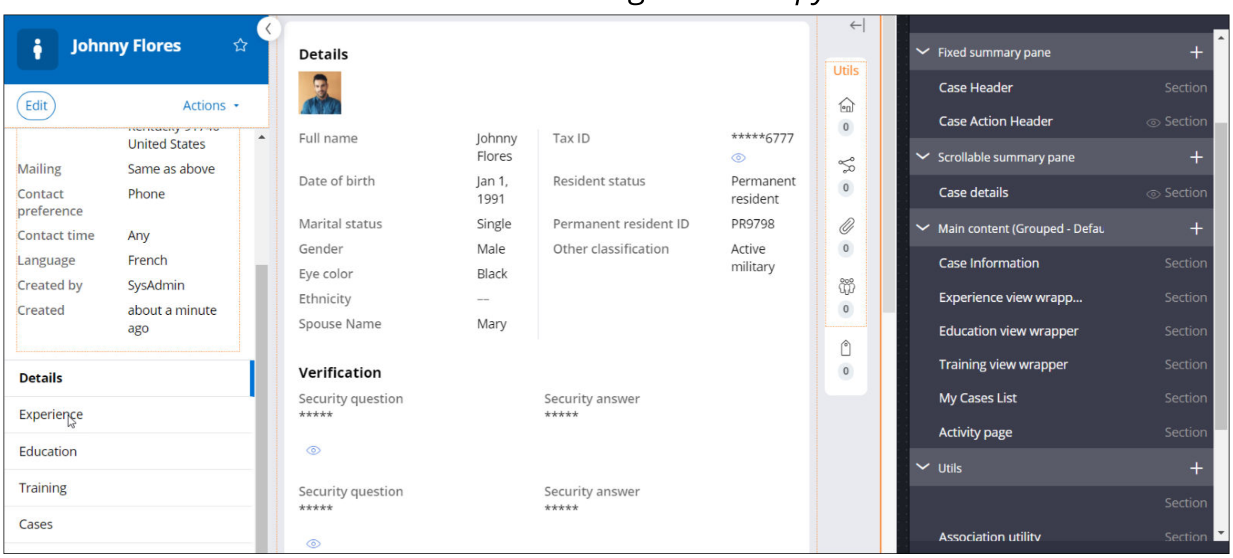


2. Add the new field along with the existing ones.

Showing captured list details in the person view

Show the captured list, for example, GrantsList details in the person view.

1. Create a view or section in the *PegaPS-Work-Entity-Person-View* class.
2. Include the section in the Main Content region of the *pyCaseMainInner* view.



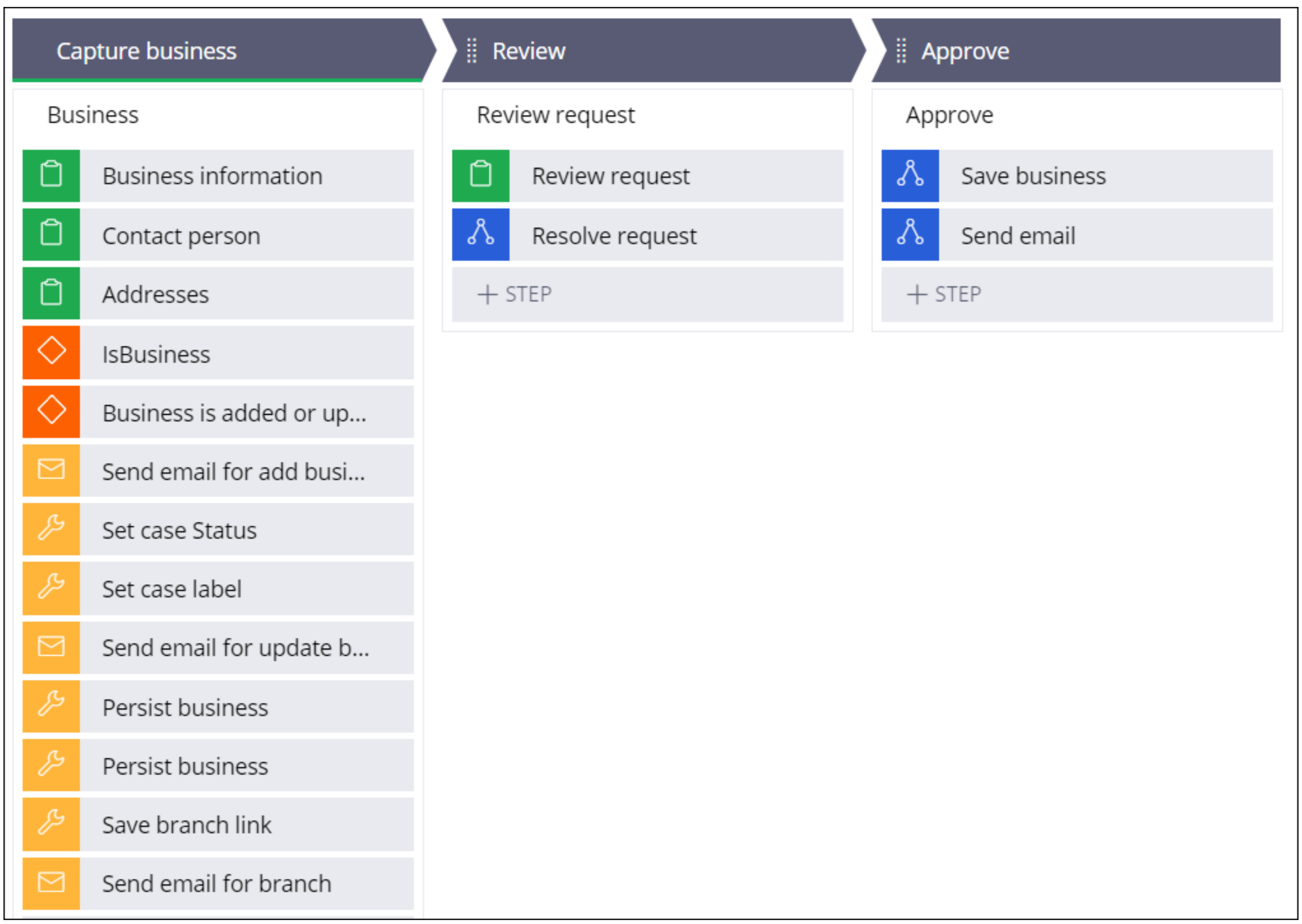
Business entity

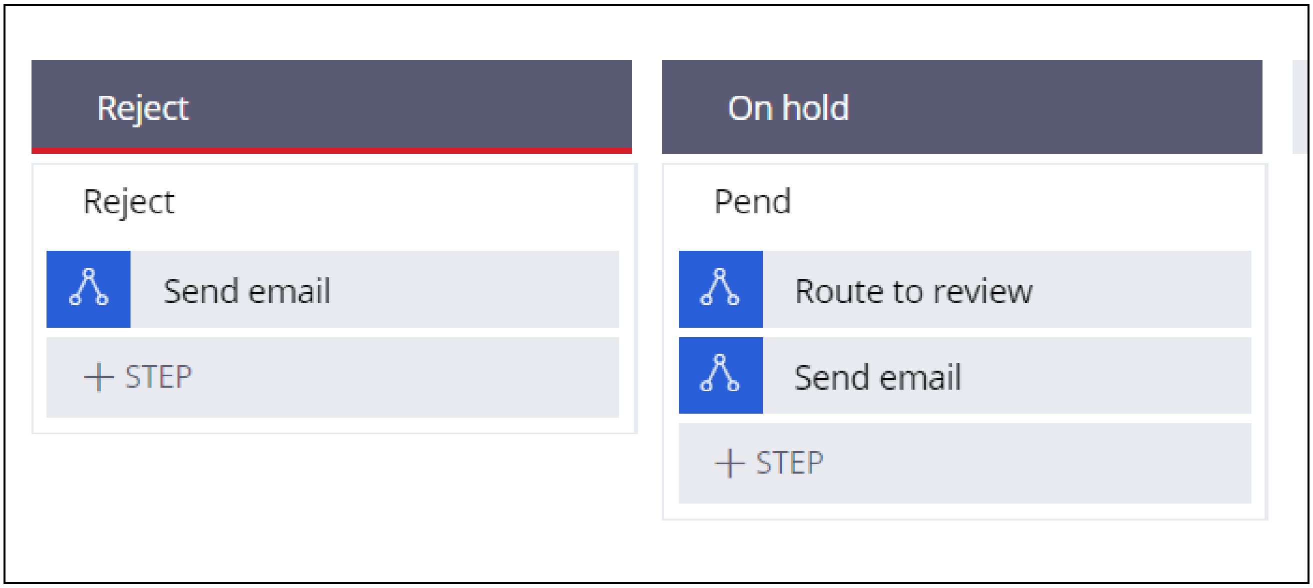
Pega Government Platform provides data support to collect data about business or organizations in the form of Business Entity.

The Business Entity feature contains a persistent datastore and three supporting case types to manage the Business Entity datastore.

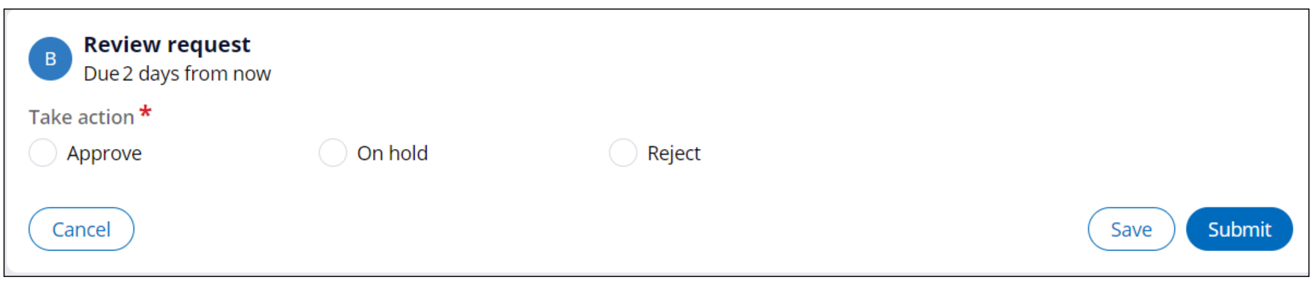
Add Business case type

Add a business case type. Using the *PegaPS-Work-Entity-Business-Add* case type, you can introduce a new entity of the type Business into the system.





The Add Business case type checks for duplicate business entries and notifies about the same. The manager has the options: Approve, On hold, and Reject.



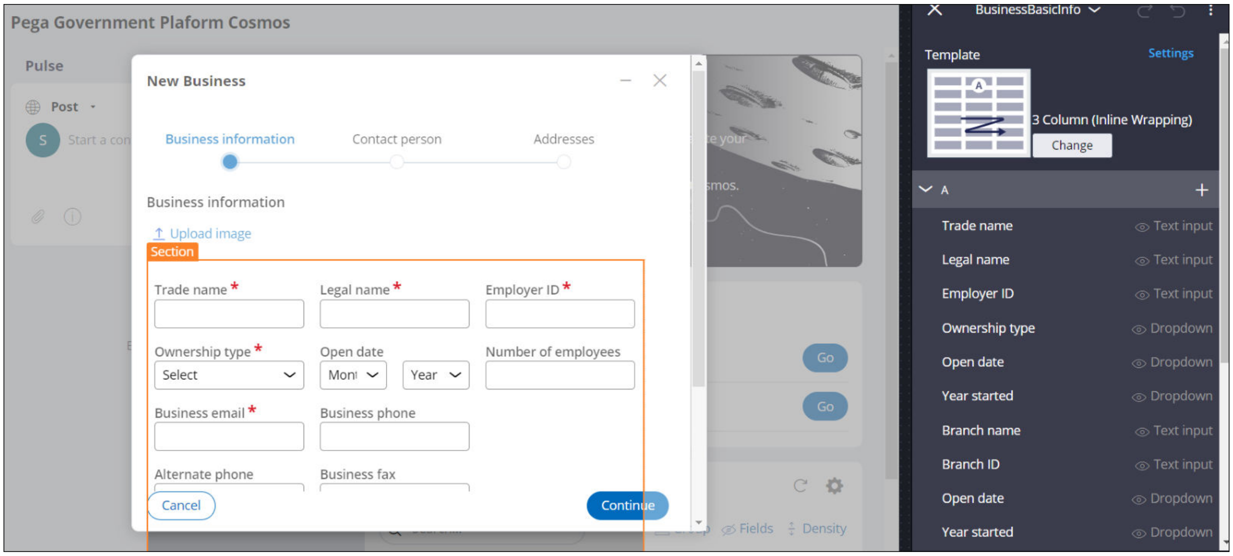
After the manager approves, the business details are persisted along with supported data like address, communication, profile image, and so on.

Adding a new field to the business intake screen

Capture a new field in the business intake screen and persist it. You can add a new data field or property and extend the existing business intake screen.

1. Create a field, for example, Parent Organization, in the business data type.
2. Run the Add Business case type and navigate to the **BusinessBasicInfo** view.

3. Click the **Add** icon and add the field created in step 1.



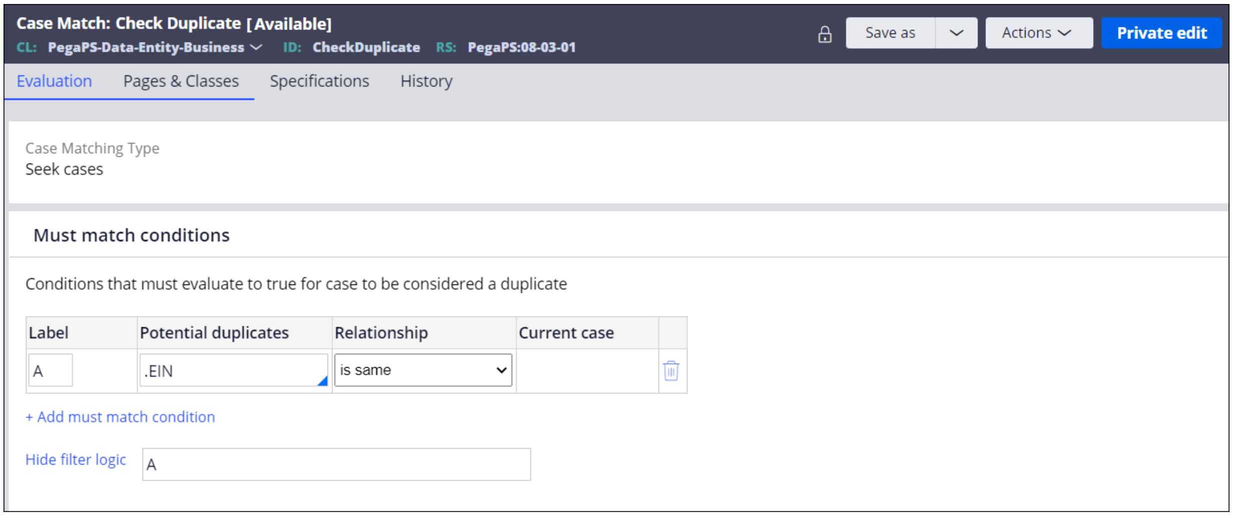
> **Result:**
>
> The new field automatically gets persisted in the business table.

Updating duplicate check validation for a field

Update the existing duplicate check fields with new fields.

1. Open the *CheckDuplicate (PegaPS-Data-Entity-Business)* case match rule.
2. Add a new field by clicking **Add must match condition**.

3. Update the filter logic accordingly.



4. Click **Save as**.
5. In the **Context** section, select an application.
6. In the **Add to ruleset** area, select a ruleset and the ruleset version.
7. Click **Create and open**.

Adding a new list item

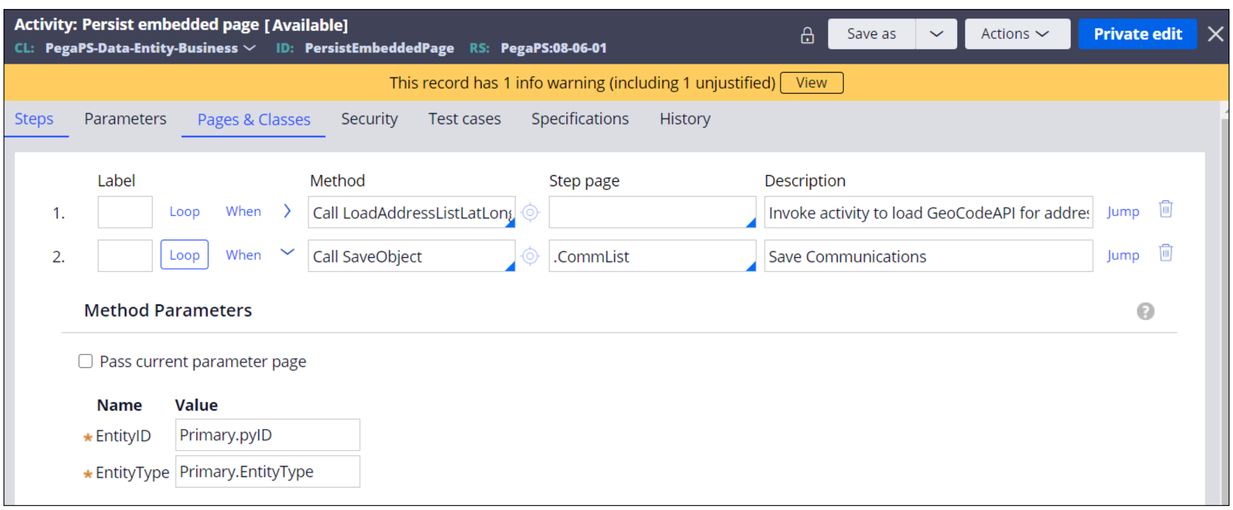
Update an existing list of items with new items.

Add a new list item, for example, SubsidiaryList and persist it.

1. In Dev Studio, to add a new list item, create a data type Subsidiary in the PegaDATA database and have the following properties pyID (Primary key), EntityID, and EntityType.
2. Add other properties related to subsidiary like subsidiary name, incorporated date, and so on.
3. In the Business data type (*PegaPS-Data-Entity-Business*), create a field.
   a. In the **Field name** box, enter `SubsidiaryList`.
   b. In the **Type** list, select **Embedded data**.
   c. In the **Data object** list, select **Subsidiary**.

d. Click Submit.

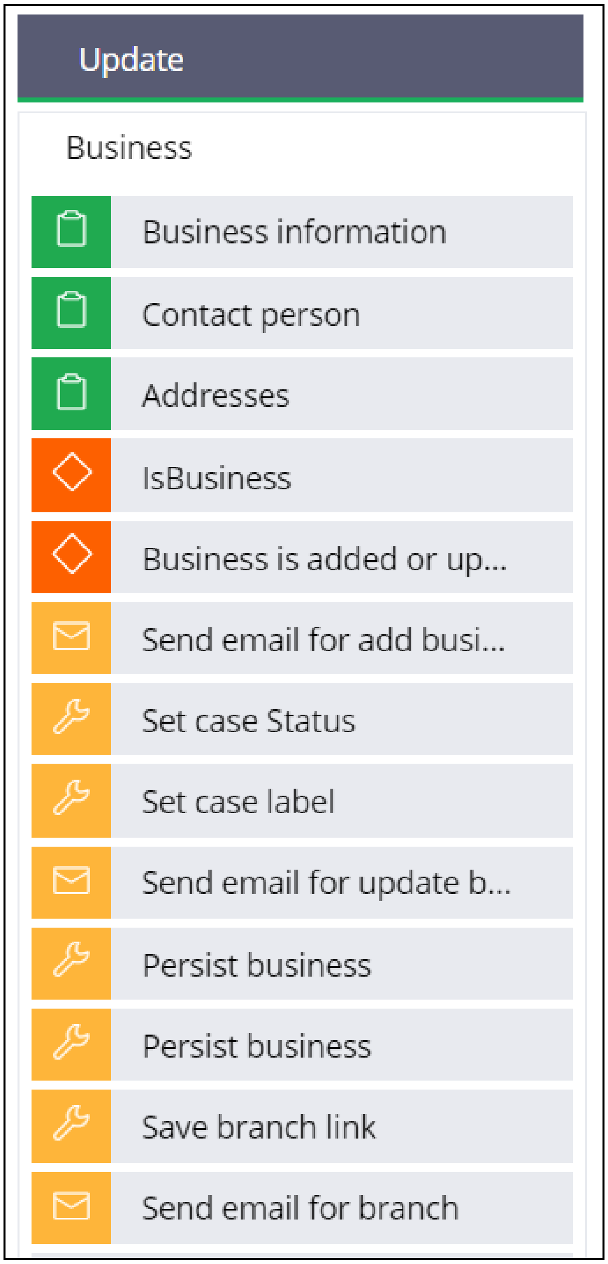
4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Business)* activity with a new step looping the SubsidiaryList property and invoke the activity SaveObject by passing the EntityID and EntityType parameters similar to CommList.



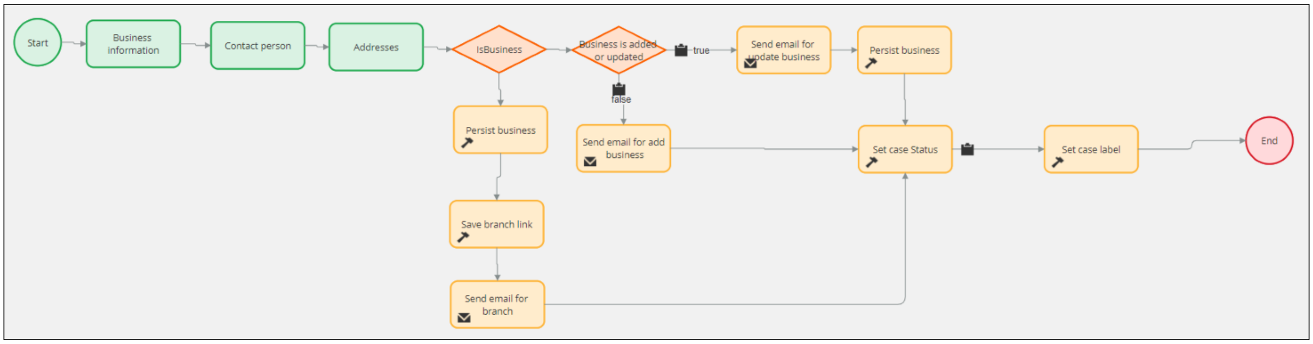
5. Create a UI to capture the subsidiary details so that they persist after you enter the data.

Update Business case type

Update the existing business case type. Using the *PegaPS-Work-Entity-Business-Update* case type, you can update the details of an existing entity.



The Business flow supports updating the Business and Branch details as well.



You can make changes to the Business data and submit them. The details persist after the duplicate validation check ensures that there are no duplicates.

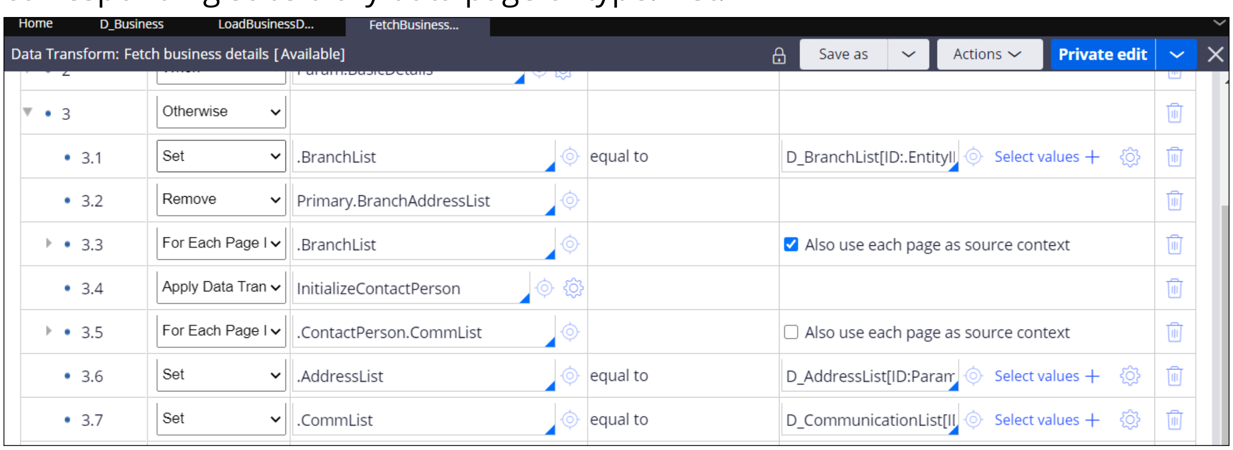
The *D_Business* data page fetches the entity details along with associated data like address, communication, and so on.

Updating an existing list property

Update the existing list properties for the business entity.

Fetch the subsidiary details to update the existing list of subsidiaries that are captured as a part of Add Business. Update an existing list property, for example, SubsidiaryList.

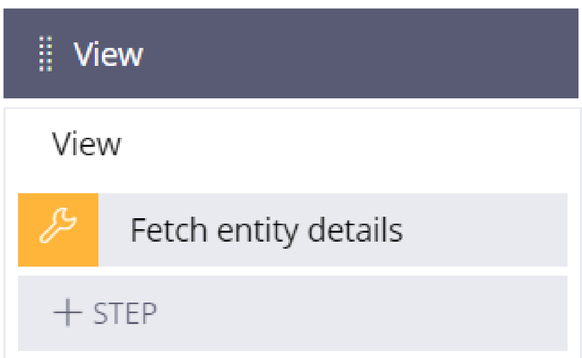
1. Update the *FetchBusinessDetails (PegaPS-Data-Entity-Business)* data transform.
2. Add a step similar to CommList or AddressList to set the details using the corresponding subsidiary data page of type: List.



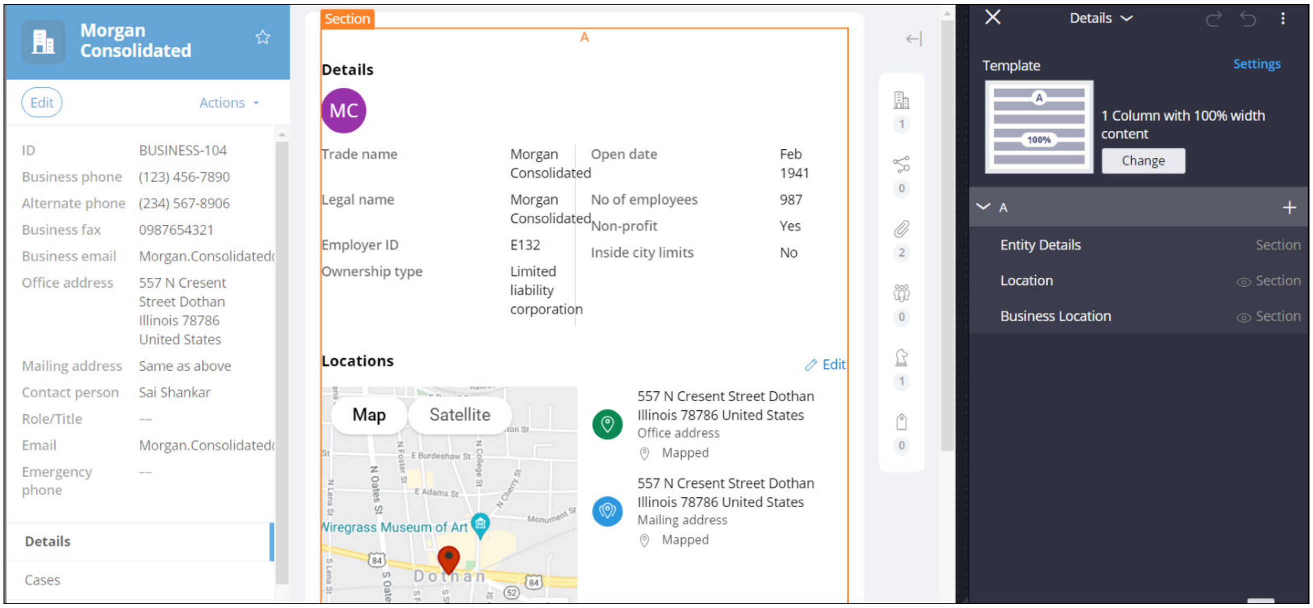
> **Result:**
>
> The Update case populates the details and any changes made are persisted.

View Business case type

View the details of a business entity. Using the *PegaPS-Work-Entity-Business-View* temporary case type, you can view the complete details of an existing business entity.



The Details (*PegaPS-Data-Entity-Business*) wrapper section contains all the business-related views or sections.

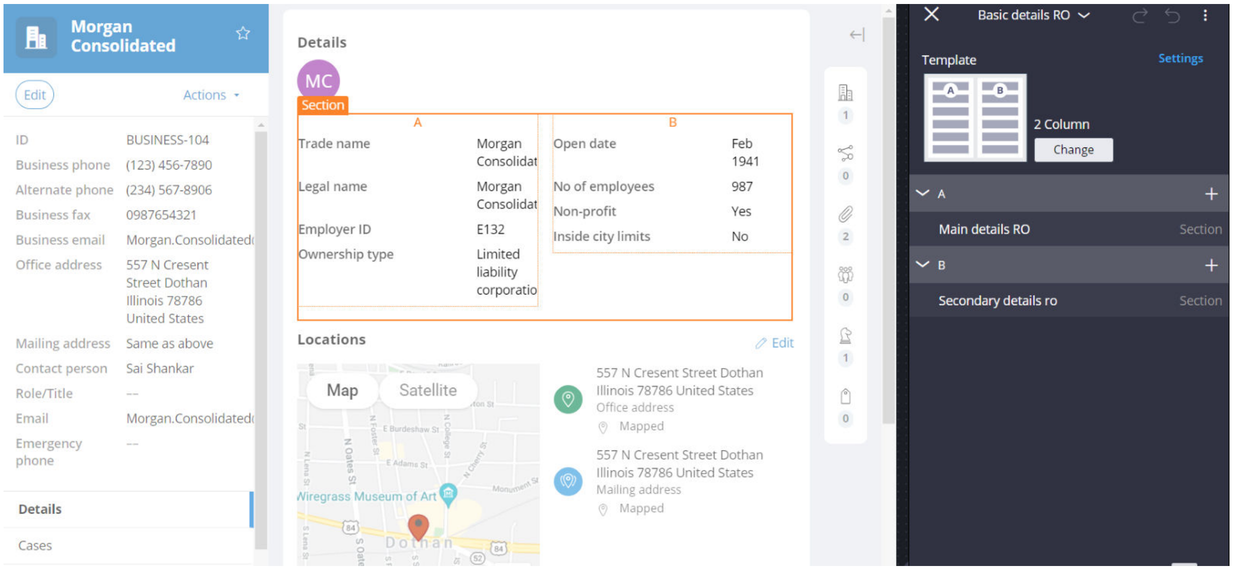


Adding a field to the business view

Add new fields to an existing business view.

Add a field, for example, Parent Organization to the business view.

1. To add the field, navigate to the **Basic details RO** wrapper section and choose the appropriate section to show the field, for example, the **Main details RO** section.

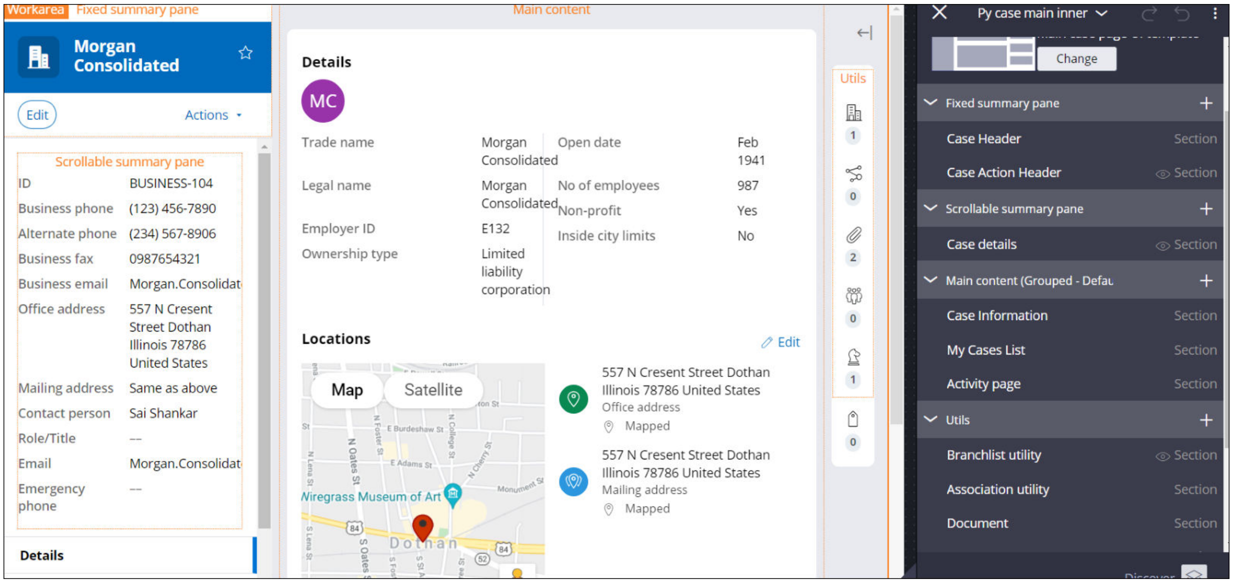


2. Add the new field along with the existing ones.

Showing captured list details in the business view

Show the captured list, for example, SubsidiaryList details in the business view.

1. Create a view or section in the *PegaPS-Work-Entity-Business-View* class.
2. Include the section in the main content region of *pyCaseMainInner* view.



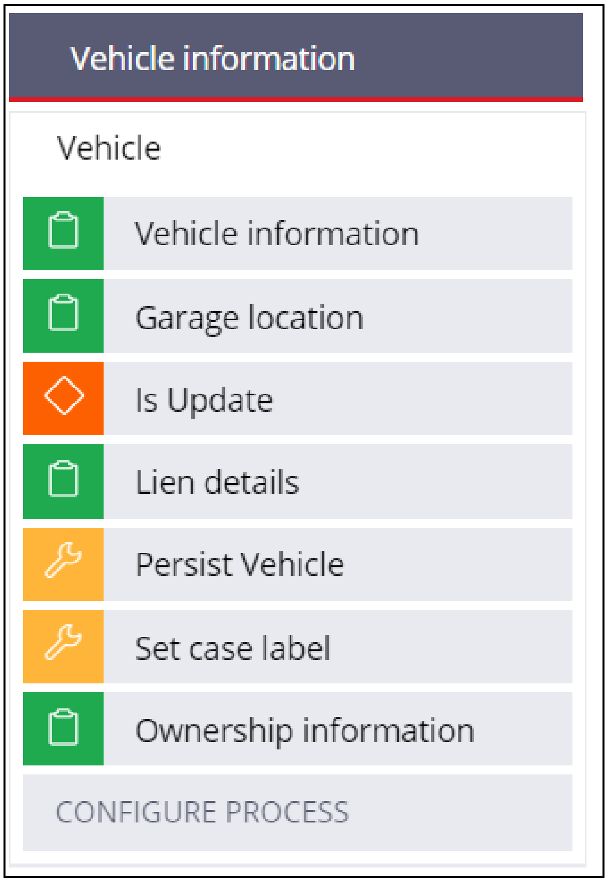
Vehicle entity

Pega Government Platform provides data support to collect data about vehicles in the form of vehicle entity.

The Vehicle Entity feature contains a persistent datastore and three supporting case types to manage the Vehicle Entity datastore.

Add Vehicle case type

Add a vehicle case type. Using the *PegaPS-Work-Entity-Vehicle-Add* case type, you can introduce a new entity of the type Vehicle into the system.

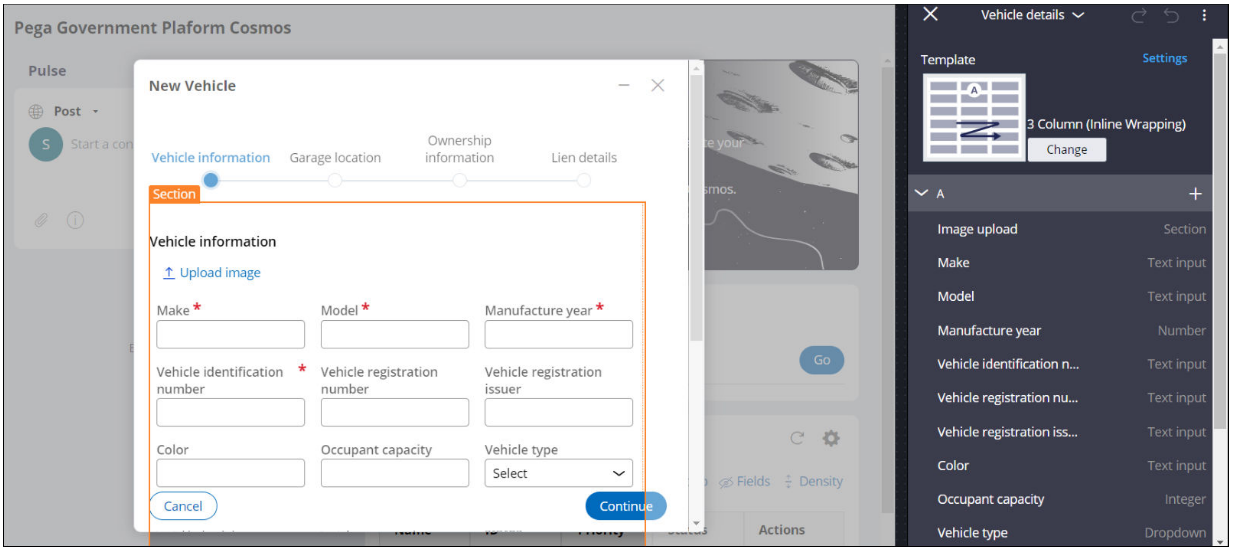


The Add Vehicle case type checks for duplicate vehicle entries based on the Vehicle Identification Number (VIN) and notifies about the same. The case type persists the vehicle details along with the supported data like address, owner, profile image, lien details, and so on.

Adding a new field to the vehicle intake screen

Capture a new field in the vehicle intake screen and persist it. You can add a new data field or property and extend the existing vehicle intake screen.

1. Create a field, for example, Purchase Date, in the vehicle data type.
2. Run the Vehicle case type and navigate to the **Vehicle details** view.
3. Click the **Add** icon and add the field created in step 1.



Result:

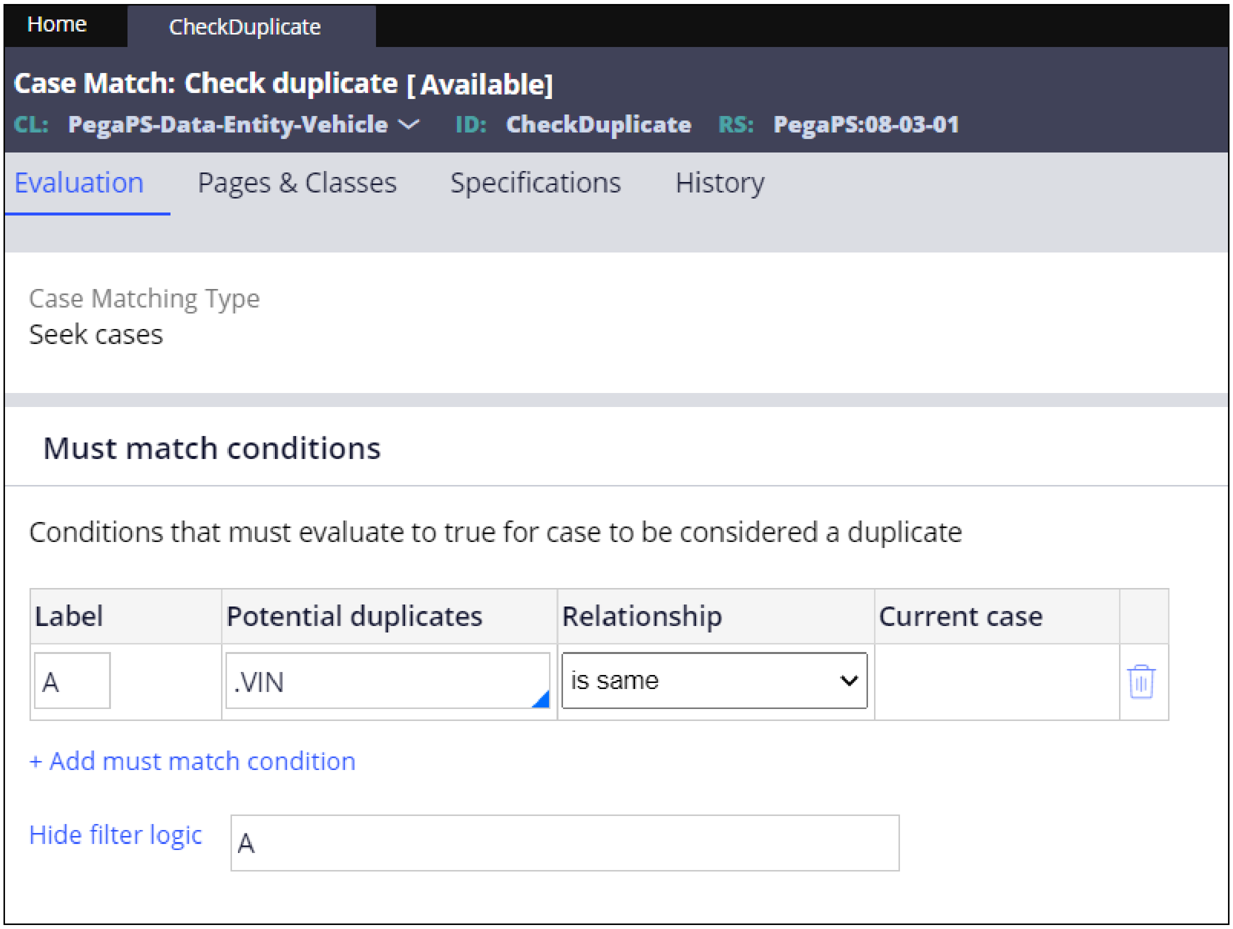
The new field automatically gets persisted in the vehicle table.

Updating duplicate check validation for a field

Update the existing duplicate check fields with new fields.

1. Open the *CheckDuplicate (PegaPS-Data-Entity-Vehicle)* case match rule.
2. Add a new field by clicking **Add must match condition**.

3. Update the filter logic accordingly.



4. Click **Save as**.
5. In the **Context** section, select an application.
6. In the **Add to ruleset** area, select a ruleset and the ruleset version.
7. Click **Create and open**.

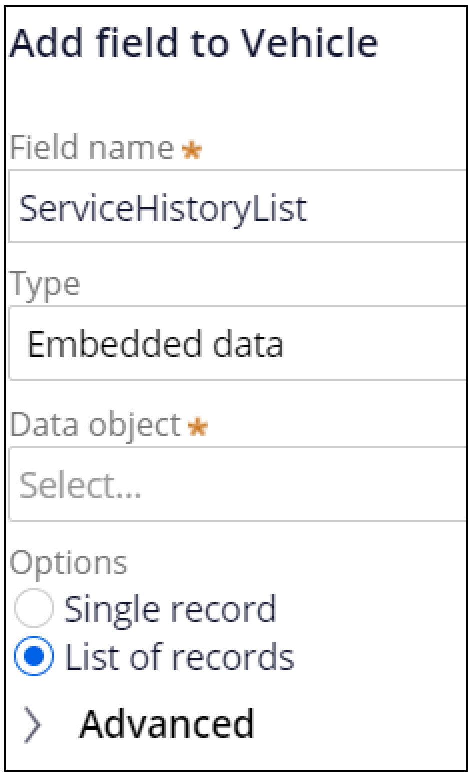
Adding a new list item

Update an existing list of items with new items.

Add a new list item, for example, ServiceHistoryList and persist it.

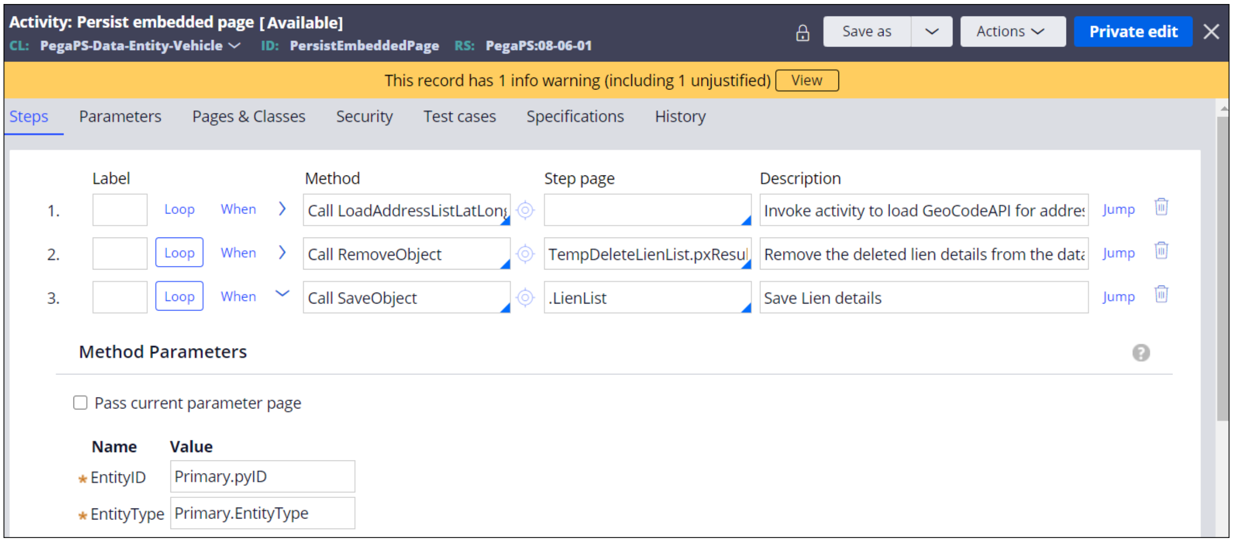
1. In Dev Studio, to add a new list item, create a data type ServiceHistory in the PegaDATA database and have the following properties pyID (Primary key), EntityID, and EntityType.

2. Add other properties related to subsidiary like service center name, service date, and so on.
3. In the Vehicle data type (*PegaPS-Data-Entity-Vehicle*), create a field.
   a. In the **Field name** box, enter `ServiceHistoryList`.
   b. In the **Type** list, select **Embedded data**.
   c. In the **Data object** list, select **ServiceHistory**.
   d. Click **Submit**.



4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Vehicle)* activity with a new step looping the ServiceHistoryList property and invoke the activity SaveObject by

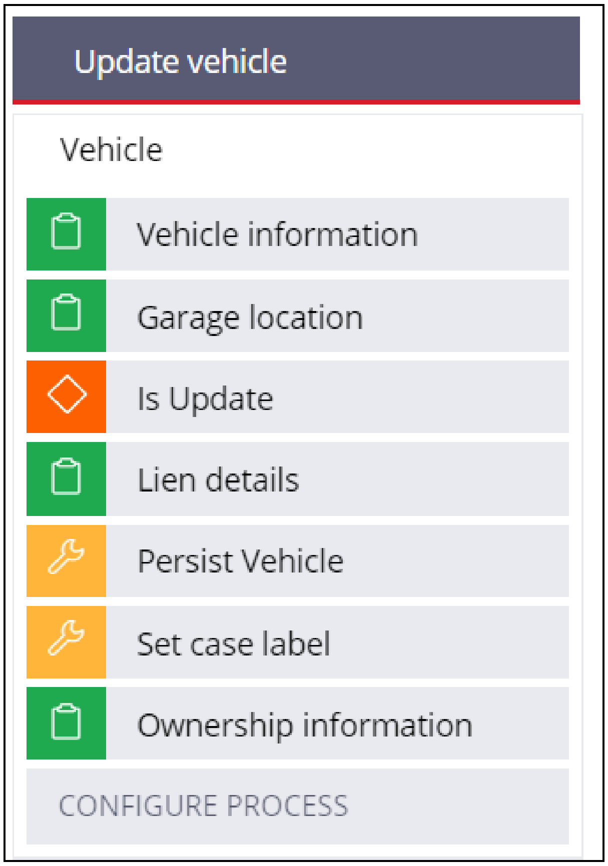
passing the EntityID and EntityType parameters similar to CommList.



5. Create a UI to capture the service history details so that they persist after you enter the data.

Update Vehicle case type

Update the existing vehicle case type. Using the *PegaPS-Work-Entity-Vehicle-Update* case type, you can update the details of an existing entity.



The Update vehicle case type fetches the details of the Vehicle entity that needs to be updated. You can make changes to the vehicle data and submit them. The details persist after the duplicate validation check ensures that there are no duplicates.

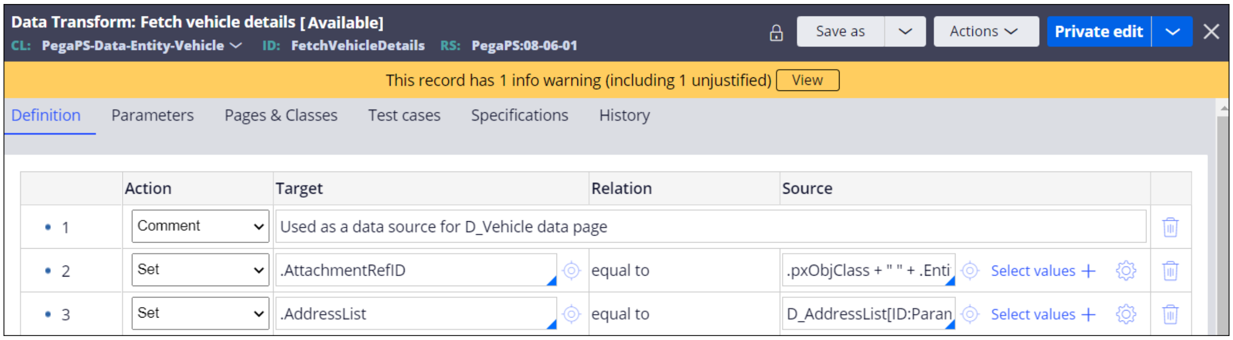
The *D_Vehicle* data page fetches the entity details along with associated data like address, lien, and so on.

Updating an existing list property

Update the existing list properties for the household entity.

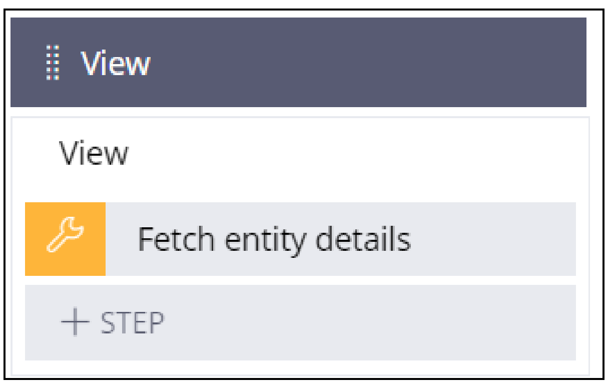
Fetch the subsidiary details to update the existing list of subsidiaries that are captured as a part of Add Vehicle. Update an existing list property, for example, ServiceHistoryList.

1. Update the *FetchVehicleDetails (PegaPS-Data-Entity-Vehicle)* data transform.
2. Add a step similar to AddressList.

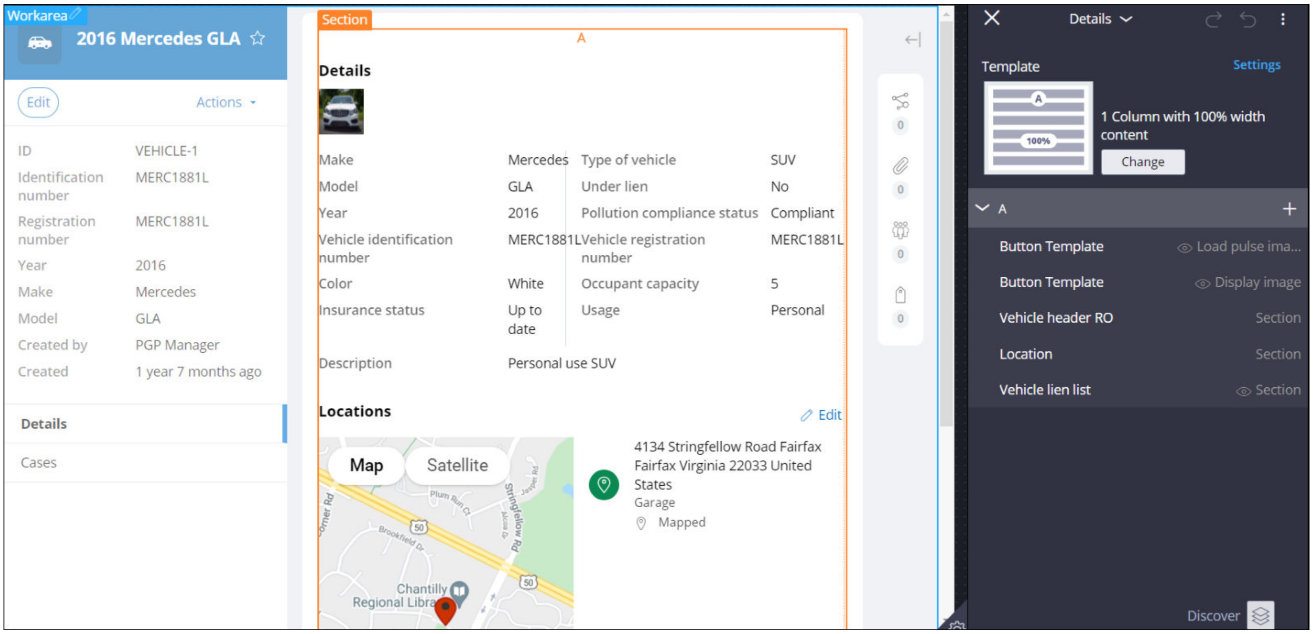


View Vehicle case type

View the details of a vehicle entity. Using the *PegaPS-Work-Entity-Vehicle-View* temporary case type, view the complete details of an existing vehicle entity.



The Details (*PegaPS-Data-Entity-Vehicle*) wrapper section contains all the vehicle related views or sections.

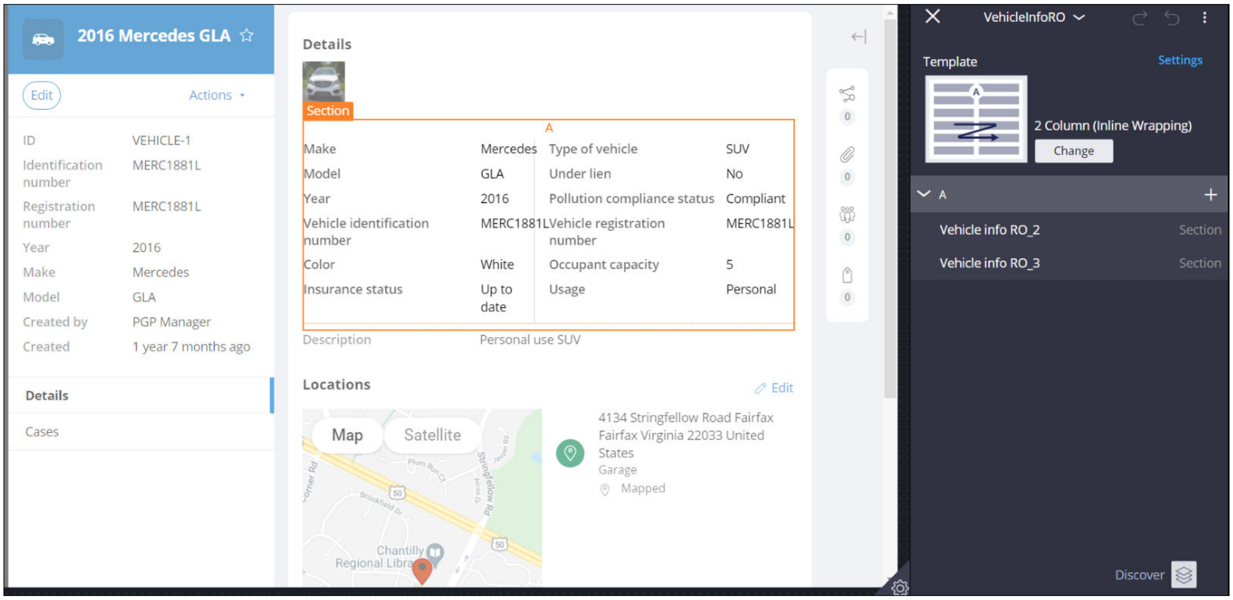


Adding a field to the vehicle view

Add new fields to an existing vehicle view.

Add a field, for example, Purchase Date to the vehicle view.

1. To add the field, navigate to the Details wrapper section and choose the appropriate section to show the field, for example, the Vehicle header RO section.

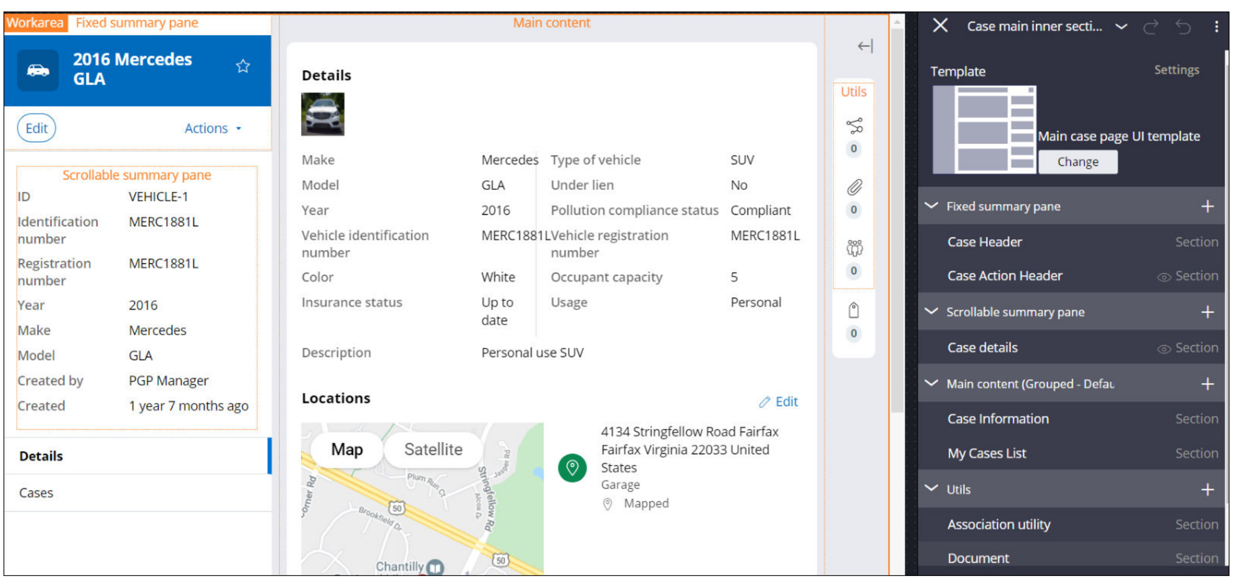


2. Add the new field along with the existing ones.

Showing captured list details in the vehicle view

Show the captured list, for example, ServiceHistoryList details in the vehicle view.

1. Create a view or section in *PegaPS-Work-Entity-Vehicle-View* class.
2. Include the section in the Main content region of the *pyCaseMainInner* view.



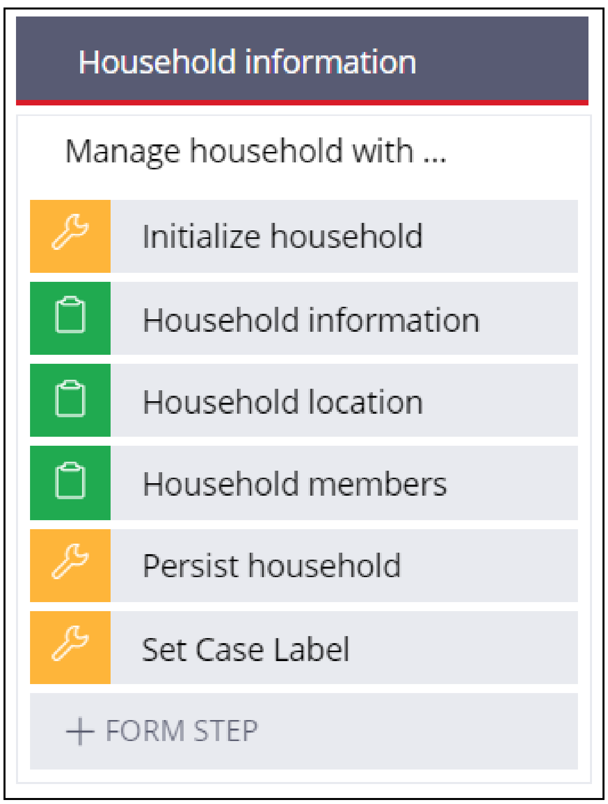
Household entity

Pega Government Platform provides data support to collect data about households in the form of Household Entity.

The Household Entity feature contains a persistent datastore and three supporting case types to manage the Household Entity datastore.

Add Household case type

Add a household case type to the system. Using the *PegaPS-Work-Entity-Household-Add* case type, you can introduce a new entity of the type Household into the system.



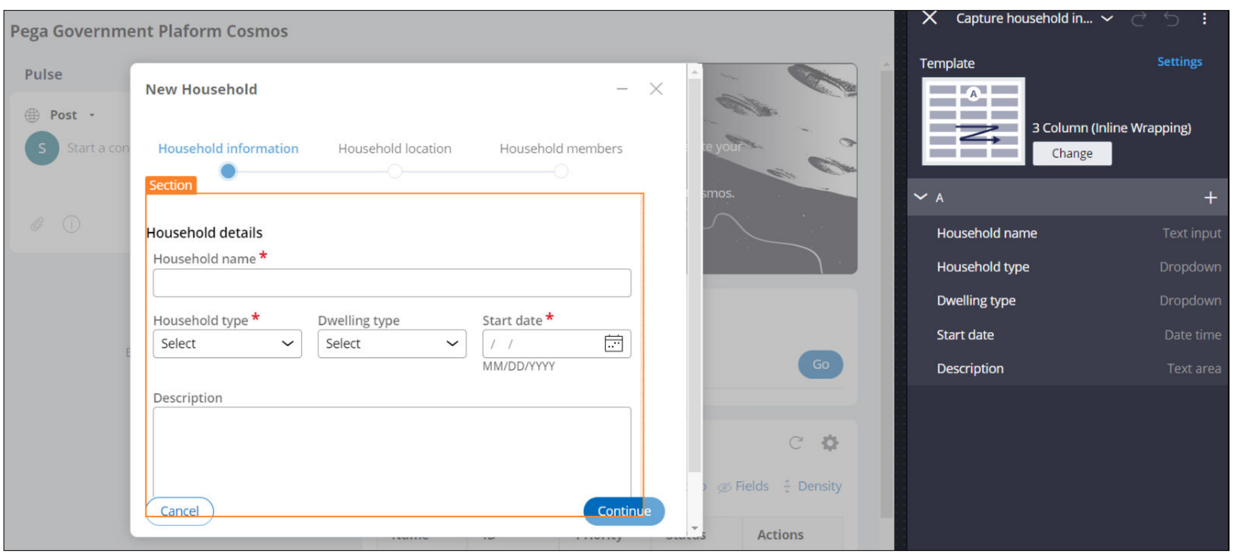
Adding a new household is a three step process. In the Household information step, the basic details like name, type of household, name, description, and start date are captured. In the next step, address details are captured and in the last step details of the household members are captured, and then all the details are persisted.

Note: Unlike other Pega Government Platform entities, household does not have any duplicate validation check.

Adding a new field to the household intake screen

Capture a new field in the household intake screen and persist it. You can add a new data field or property and extend the existing household intake screen.

1. Create a field, for example, Is Remote location in the household data type.
2. Run the Household case type and navigate to the **Capture household information** view.
3. Click the **Add** icon and add the field created in step 1.



Result:

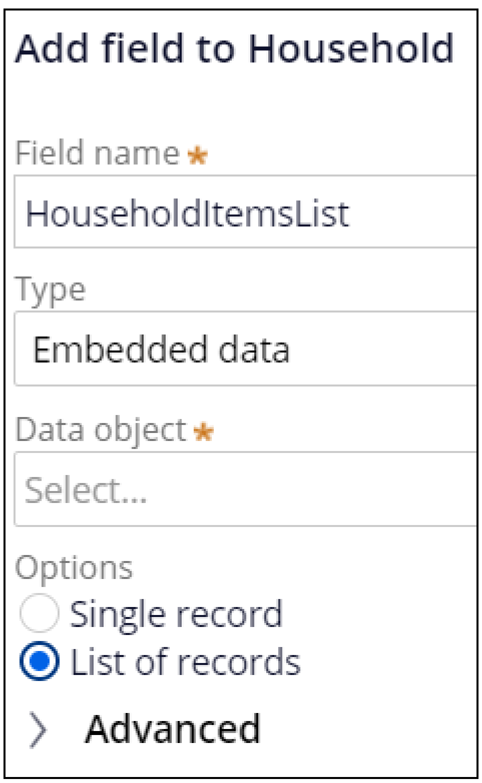
The new field automatically gets persisted in the household table.

Adding a new list item

Update an existing list of items with new items.

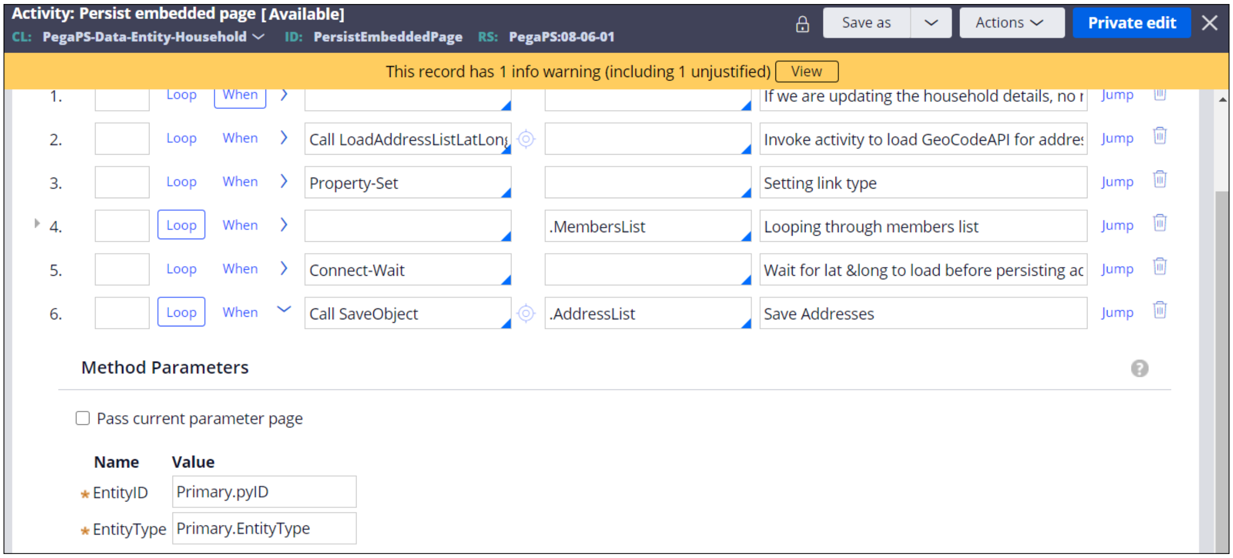
Add a new list item, for example, HouseholdItemsList and persist it.

1. In Dev Studio, to add a new list item, create a data type HouseholdItems in the PegaDATA database and have the following properties pyID (Primary key), EntityID, and EntityType.
2. Add other properties related to subsidiary like item name, cost, purchased on, and so on.
3. In the Vehicle data type (*PegaPS-Data-Entity-Household*), create a field.
    a. In the **Field name** box, enter `HouseholdItemsList`.
    b. In the **Type** list, select **Embedded data**.
    c. In the **Data object** list, select **HouseholdItem**.
    d. Click **Submit**.



4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Household)* activity with a new step looping the HouseholdItemsList property and invoke the activity SaveObject

by passing the EntityID and EntityType parameters similar to AddressList.

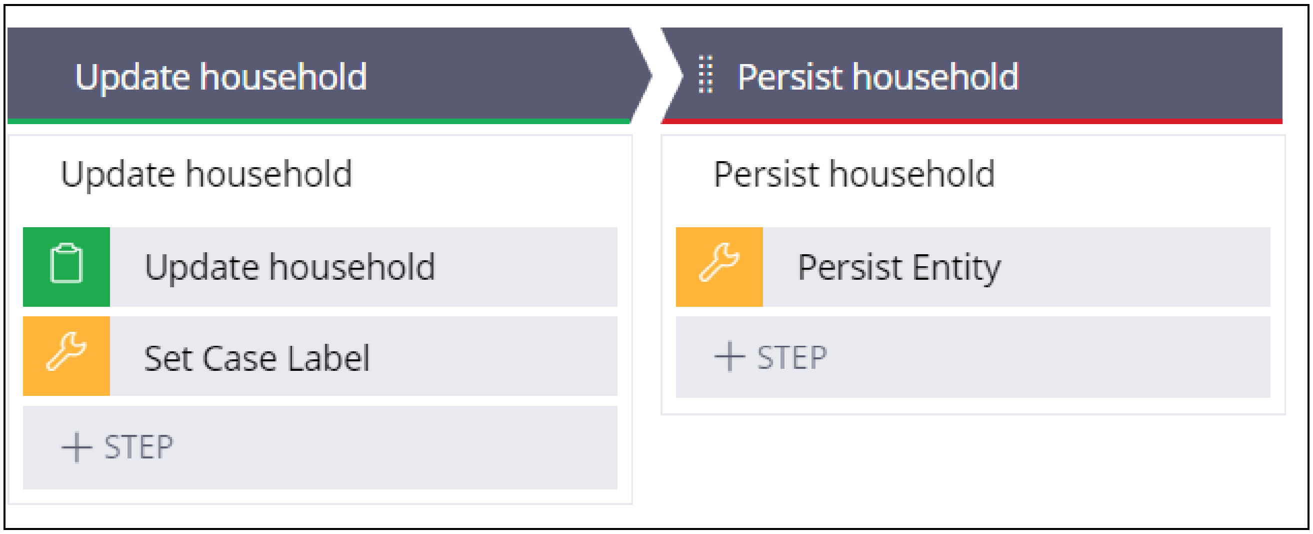


5. Create a UI to capture the household item details so that they persist after you enter the data.

Update Household case type

Update the existing household case type. Using the *PegaPS-Work-Entity-Household-Update* case type, you can update the details of an existing entity.

> **Note:** In this case type, you can update only the basic household details, but not the members of the household. The Manage Members case type supports updating household members.



The Update household case type fetches the details of the Household entity that needs to be updated. You can make changes to the household data and submit them. The details persist after you submit.

The *D_Household* data page fetches the entity details along with associated data, like Address.

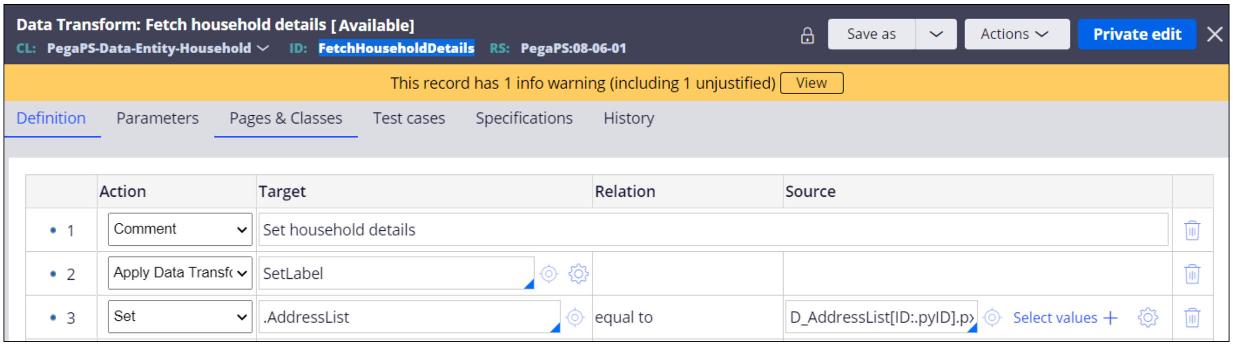
Updating an existing list property

Update the existing list properties for the household entity.

Fetch the household details to update the list of item details in a household that are captured as a part of Add Household. Update an existing list property, for example, HouseholdItemsList.

1. Update the *FetchHouseholdDetails (PegaPS-Data-Entity-Household)* data transform.

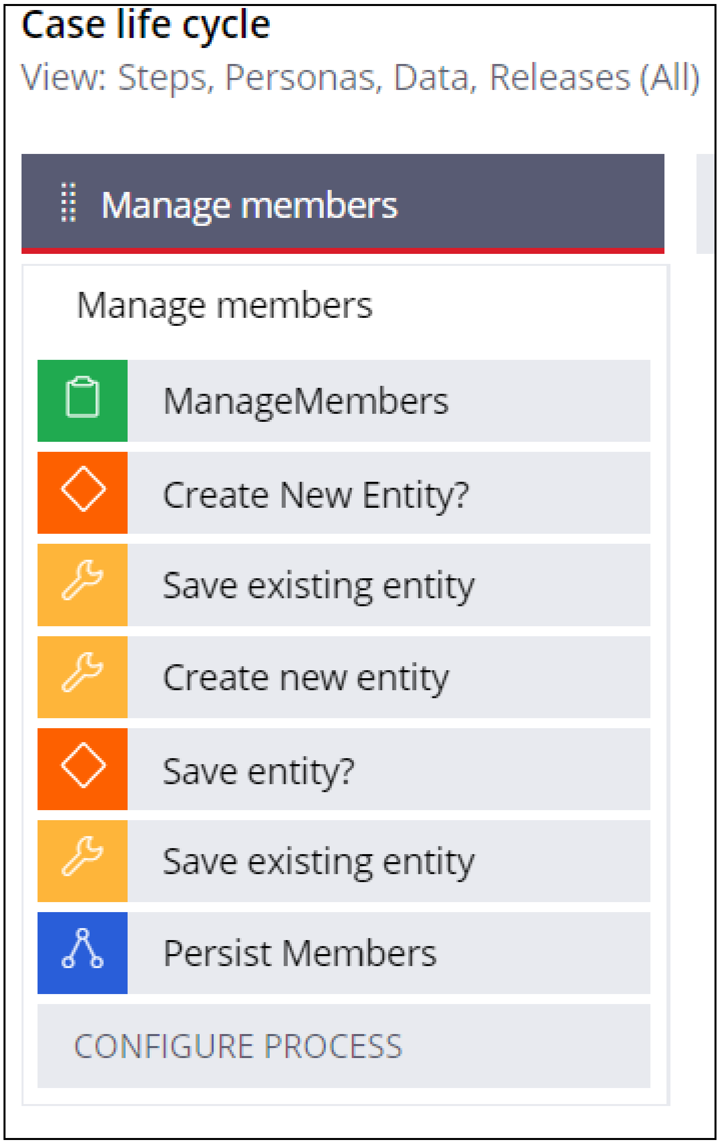
2. Add a step similar to AddressList.



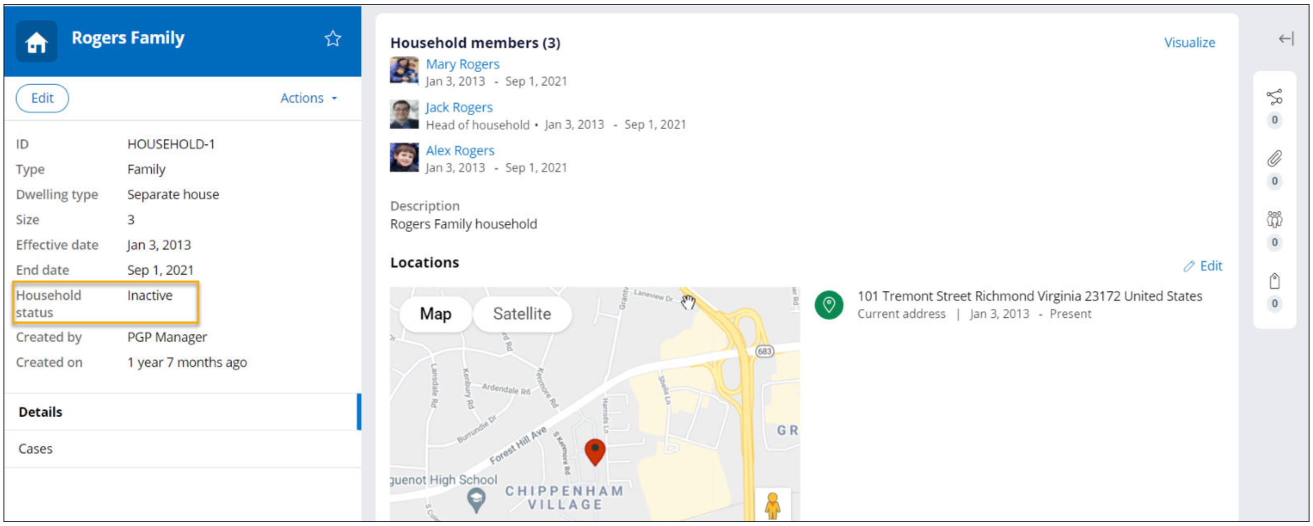
> **Result:**
>
> The Items list details are available for the user to update in the update case.

Update Manage members case type

Update the existing members of a household case type. Using the *PegaPS-Work-Manage-Member* case type, you can update the details of the existing members of a household.

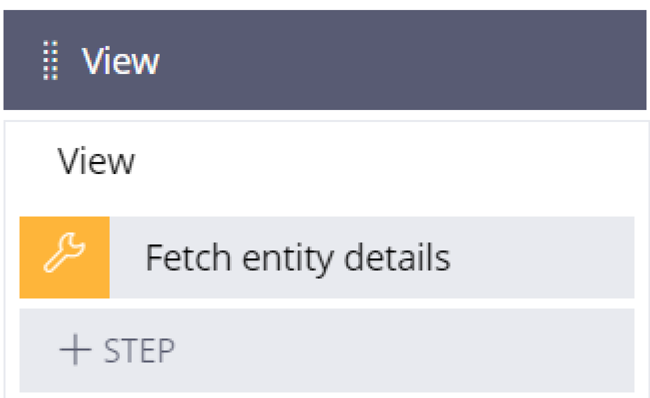


When you try to update existing members of a household by adding a new member or by updating the details of an existing member, the current household becomes inactive and a new household gets created with active status with the updated list of members.

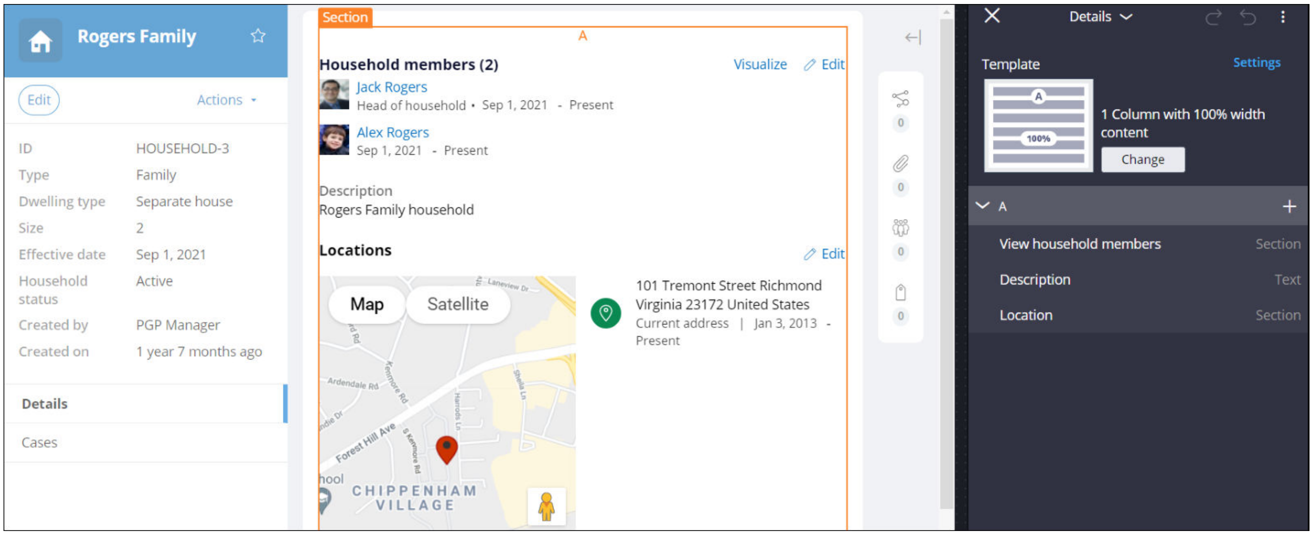


View Household case type

View the details of a household entity. Using the *PegaPS-Work-Entity-Household-View* temporary case type, you can view the complete details of an existing household entity.



The Details (*PegaPS-Data-Entity-Household*) wrapper section contains all the household related views or sections.

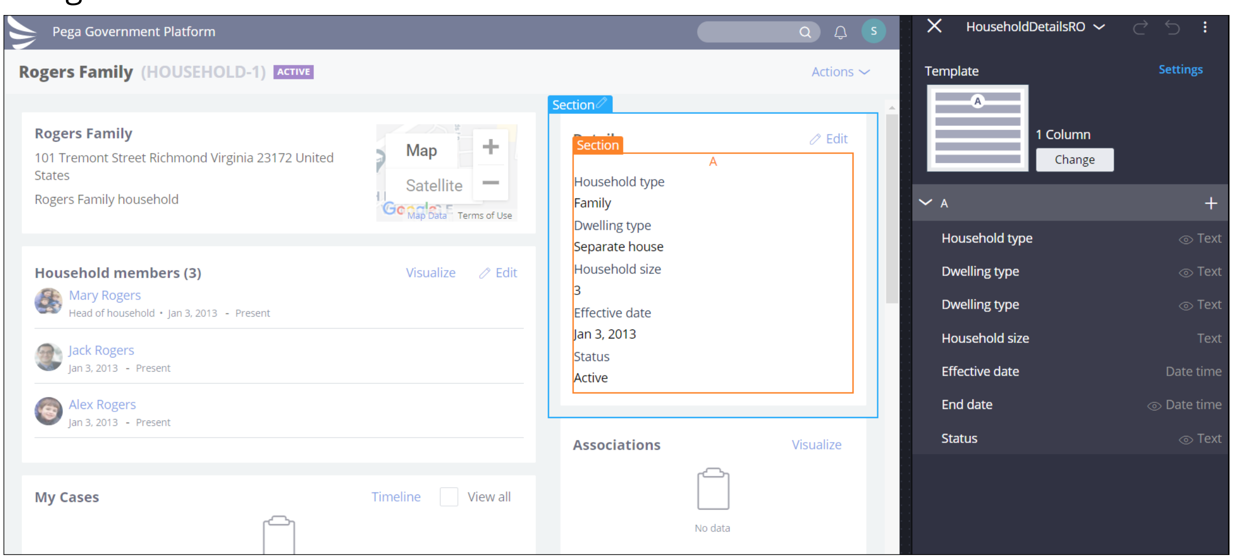


Adding a field to the household view

Add new fields to an existing household view.

Add a field, for example, Is Remote location to the household view.

1. To add the field, navigate to the Details wrapper section to show the field, or navigate to the **Case details** section.

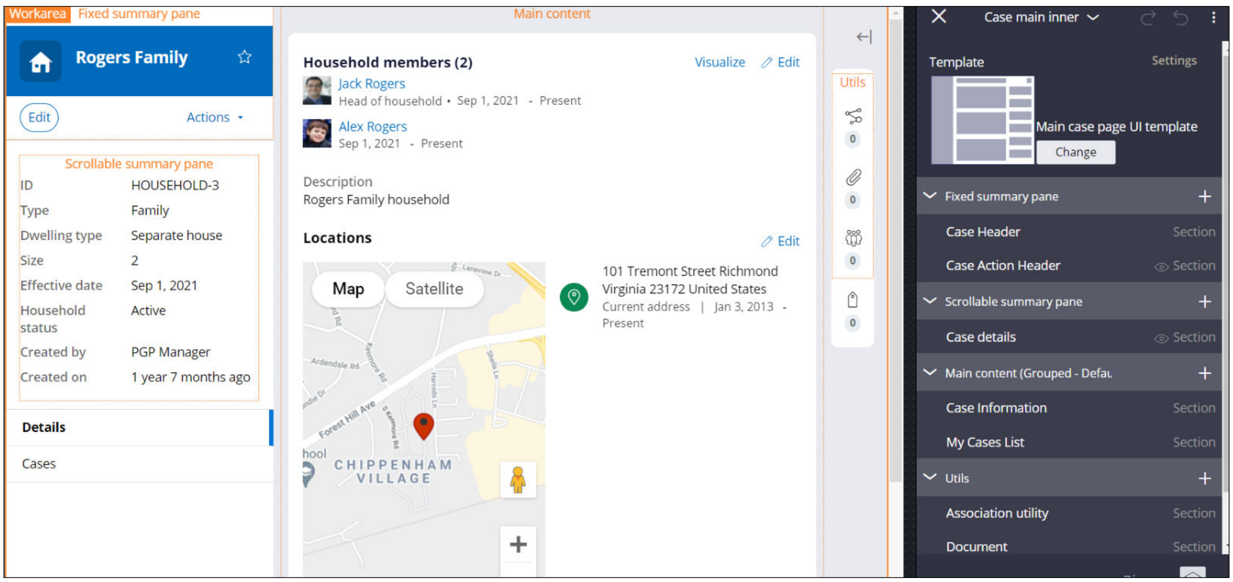


2. Add the new field along with the existing ones.

Showing captured list details in the household view

Show the captured list, for example, HouseholdItemsList details in the household view.

1. Create a view or section in the *PegaPS-Work-Entity-Household-View* class.
2. Include the section in the Main content region of the **pyCaseMainInner** view as a tab.



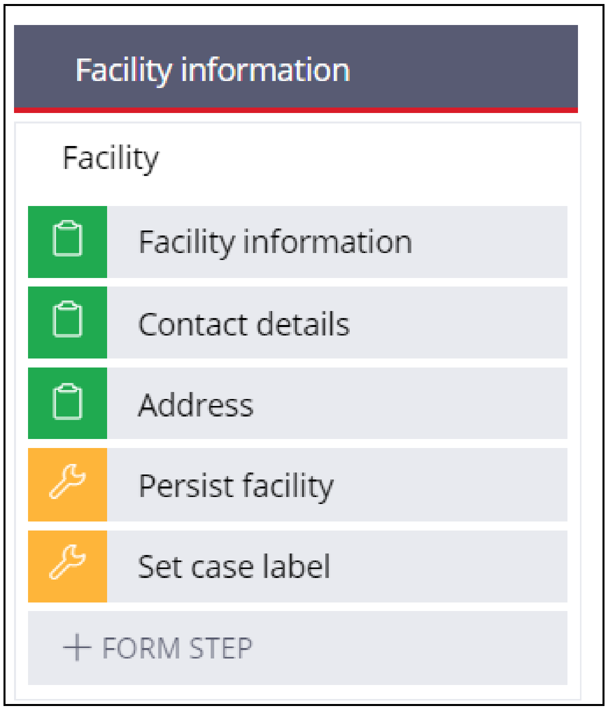
Facility entity

Pega Government Platform provides data support to collect data about facilities in the form of Facility Entity.

The facility Entity feature contains a persistent datastore and three supporting case types to manage the Facility Entity datastore.

Add Facility case type

Add a facility case type to the system. Using the *PegaPS-Work-Entity-Facility-Add* case type, you can introduce a new entity of the type Facility into the system.



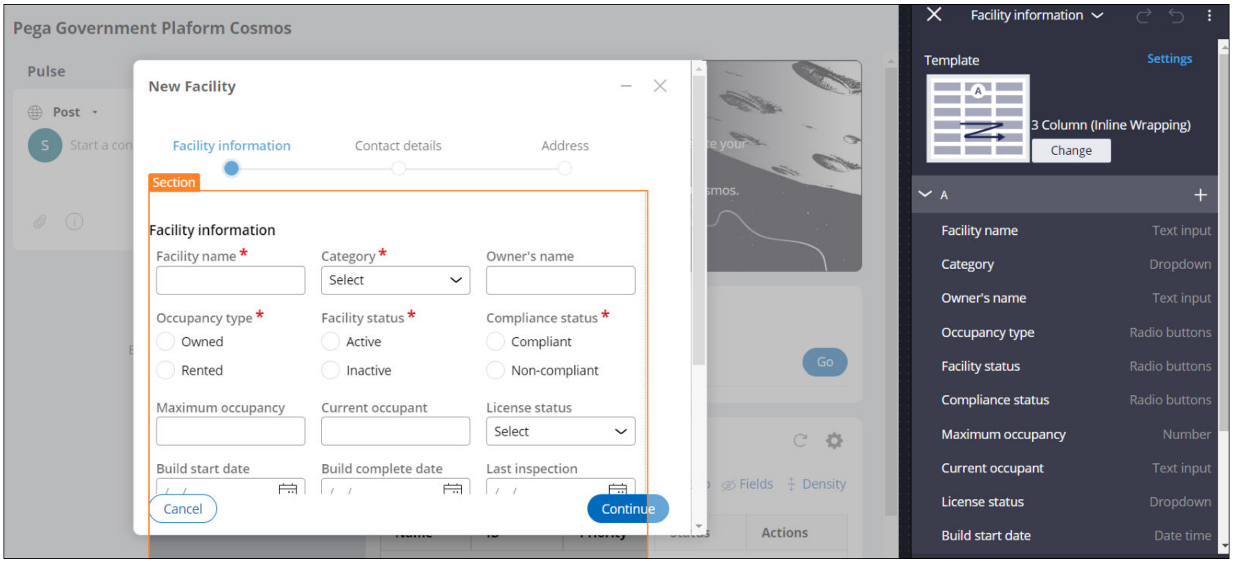
After you add a new facility and successfully submit, the details of the facility are persisted along with supported data, for example, Address.

> **Note:** Unlike other Pega Government Platform entities, facility does not have any duplicate validation check.

Adding a new field to the facility intake screen

Capture a new field in the facility intake screen and persist it. You can add a new data field or property and extend the existing facility intake screen.

1. Create a field, for example, Permission Date in the facility data type.
2. Run the household case type and navigate to the **Facility Information** view.
3. Click the **Add** icon and add the field created in step 1.



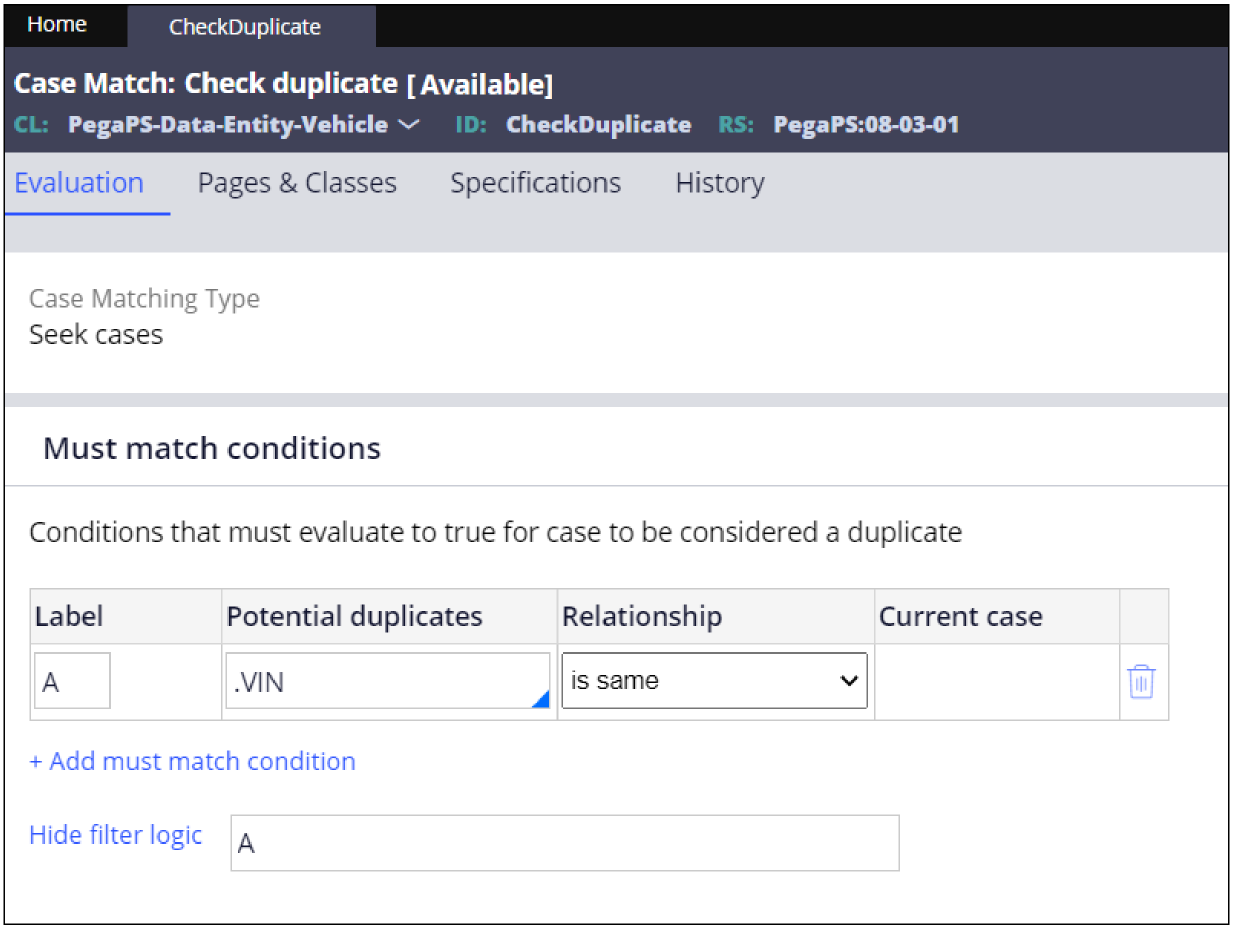
> **Result:**
>
> The new field automatically gets persisted in the household table.

Introducing duplicate check validation for a field

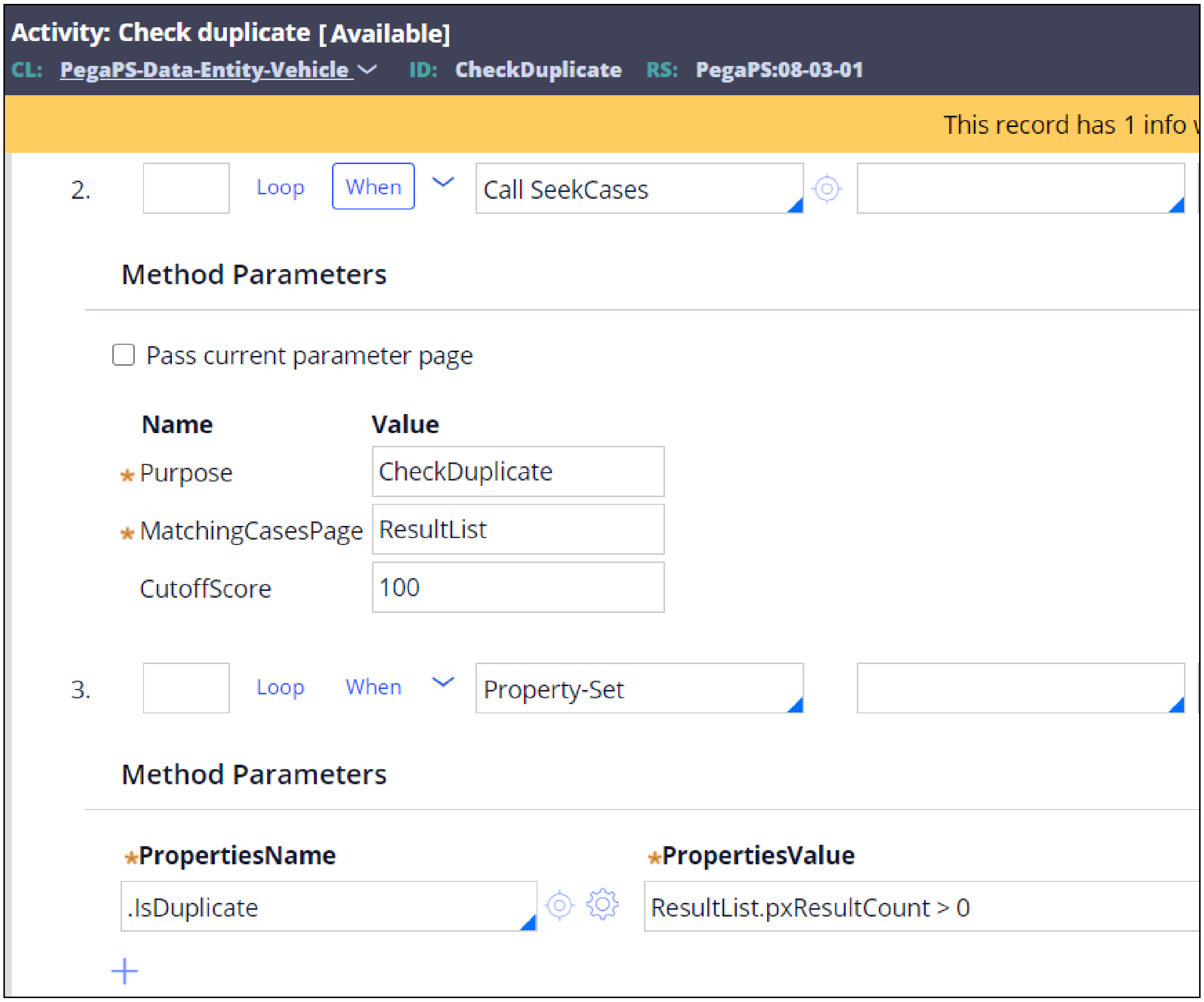
Create duplicate check fields and update them with new fields.

1. Create the *CheckDuplicate (PegaPS-Data-Entity-Facility)* case match rule.
2. Add a new field by clicking **Add must match condition**, similar to how you add for Vehicle entity.

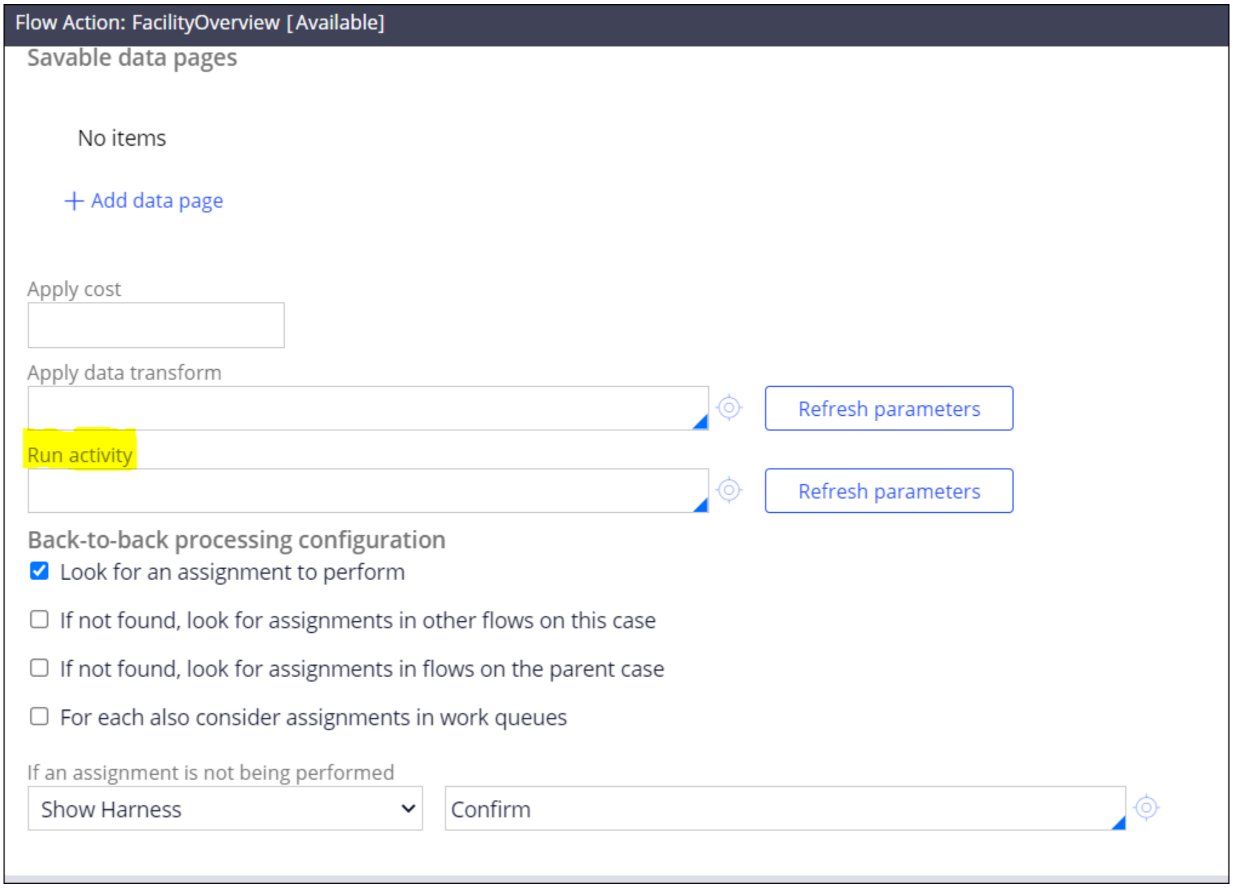
3. Update the filter logic accordingly.



4. Create an activity: *CheckDuplicate (PegaPS-Data-Entity-Facility)*, and include the steps 2 and 3 by referring to the activity of the Vehicle entity.



5. Create a post processing activity for *FacilityOverview (PegaPS-Work)* and invoke the new `CheckDuplicate` activity as a first step in the activity with the step page as `.Facility` and in the second step, send a warning message when the property value `.Facility.IsDuplicate` is true.



Adding a new list item

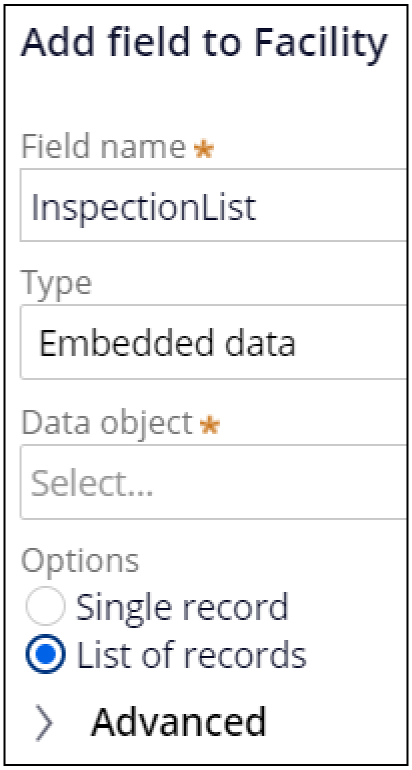
Update an existing list of items with new items.

Add a new list item, for example, InspectionList and persist it.

1. In Dev Studio, to add a new list item, create a data type Service in the PegaDATA database and have the following properties pyID (Primary key), EntityID, and EntityType.
2. Add other properties related to inspection like inspected by, inspected on, and so on.
3. In the Facility data type (*PegaPS-Data-Entity-Facility*), create a field.
   a. In the **Field name** box, enter `InspectionList`.
   b. In the **Type** list, select **Embedded data**.

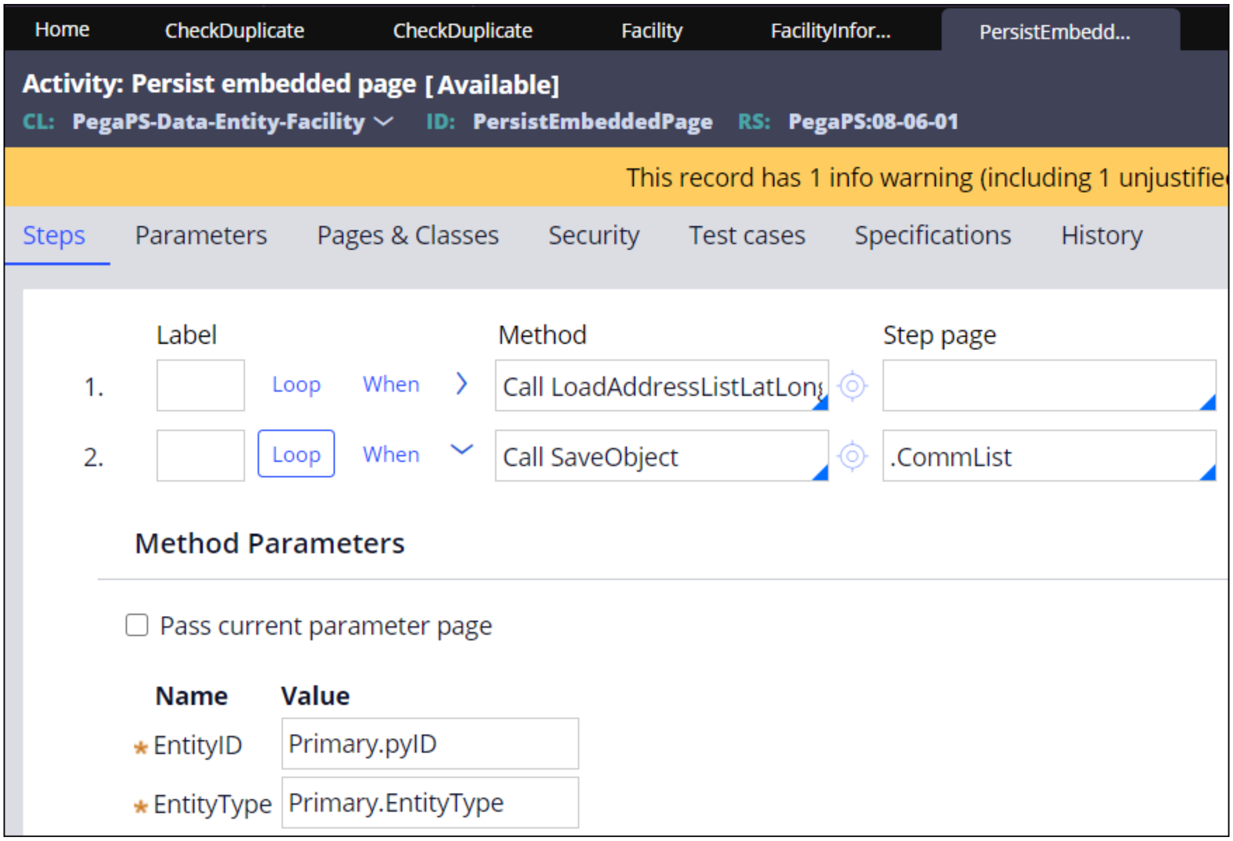
c. In the **Data object** list, select **Inspection**.

d. Click **Submit**.



4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Facility)* activity with a new step looping the InspectionList property and invoke the activity SaveObject by

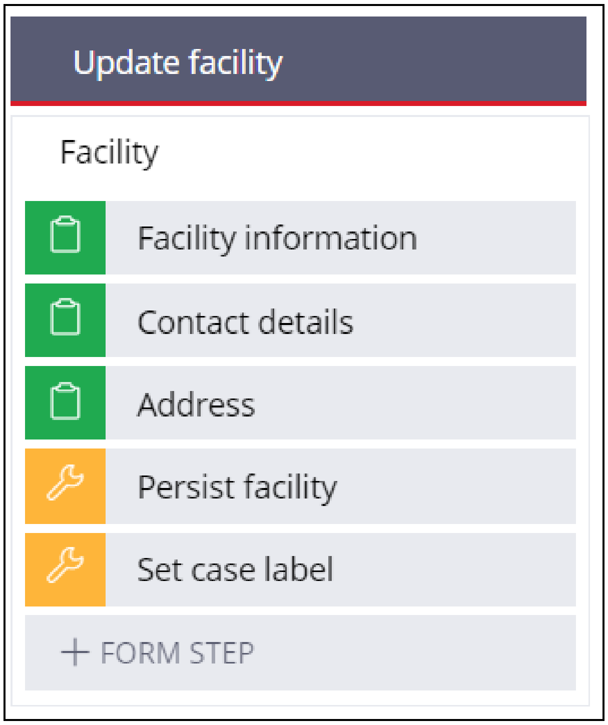
passing the EntityID and EntityType parameters similar to CommList.



5. Create a UI to capture the facility details so that they persist after you enter the data.

Update Facility case type

Update the existing facility case type. Using the *PegaPS-Work-Entity-Facility-Update* case type, you can update the details of an existing entity.



The Update facility case type fetches the details of the Facility entity that needs to be updated. You can make changes to the facility data and submit them. The details persist after you submit.

The *D_Facility* data page fetches the entity details along with associated data, like Address, Communication, and so on.

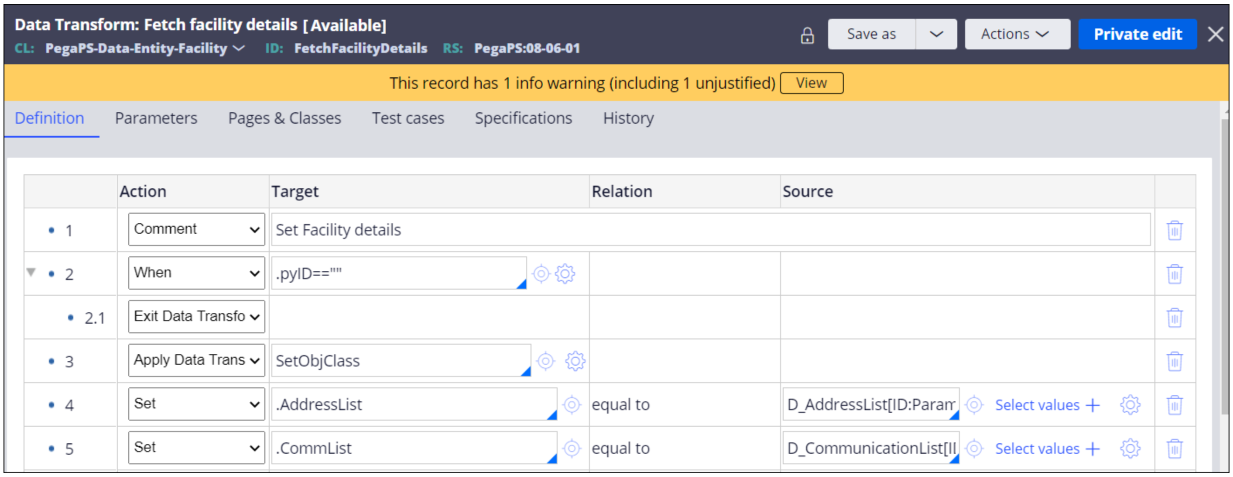
Updating an existing list property

Update an existing list property, for example, InspectionList.

Fetch the facility details to update the list of item details in a facility that are captured as a part of Add Facility.

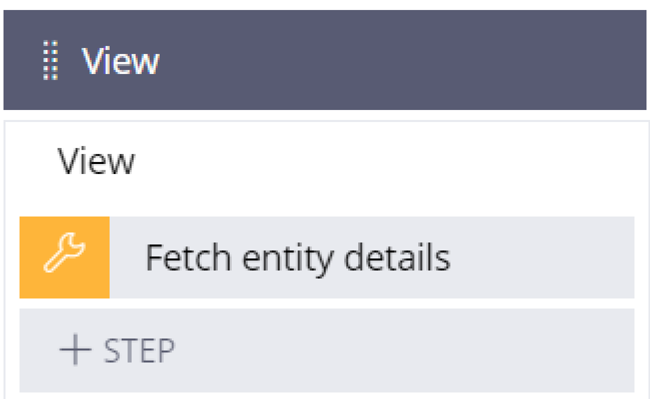
1. Update the *FetchFacilityDetails (PegaPS-Data-Entity-Facility)* data transform.

2. Add a step similar to AddressList.

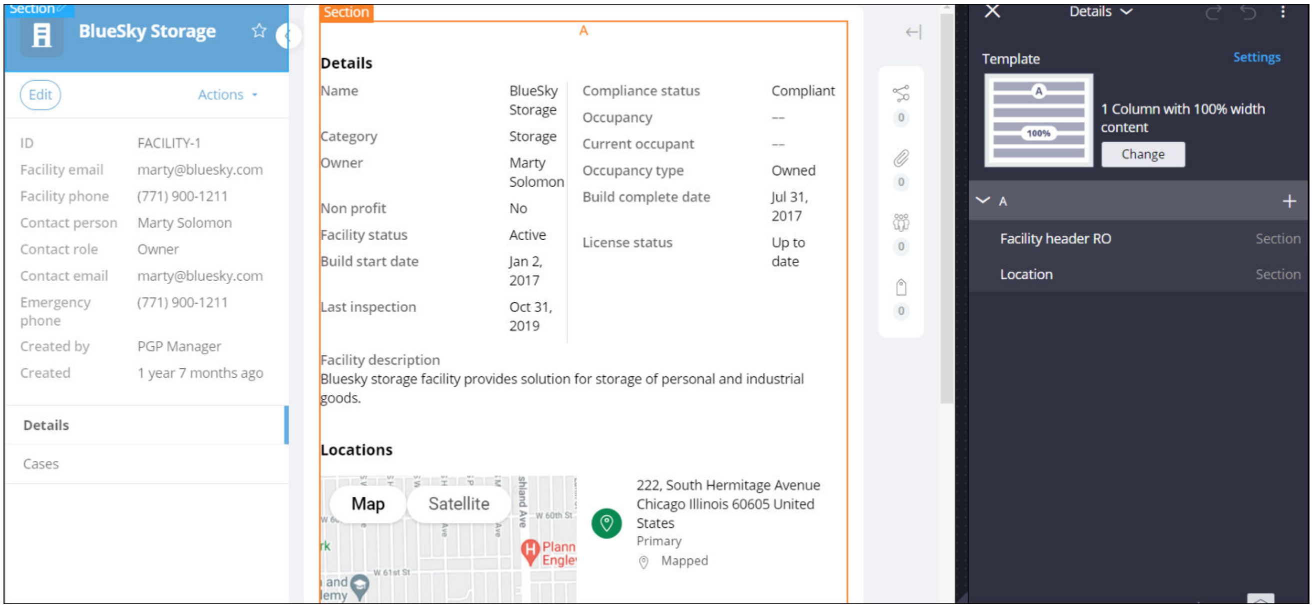


View Facility case type

View the details of a facility entity. Using the *PegaPS-Work-Entity-Facility-View* temporary case type, you can view the complete details of an existing facility entity.



The Details (*PegaPS-Data-Entity-Facility*) wrapper section contains all the facility related views or sections.

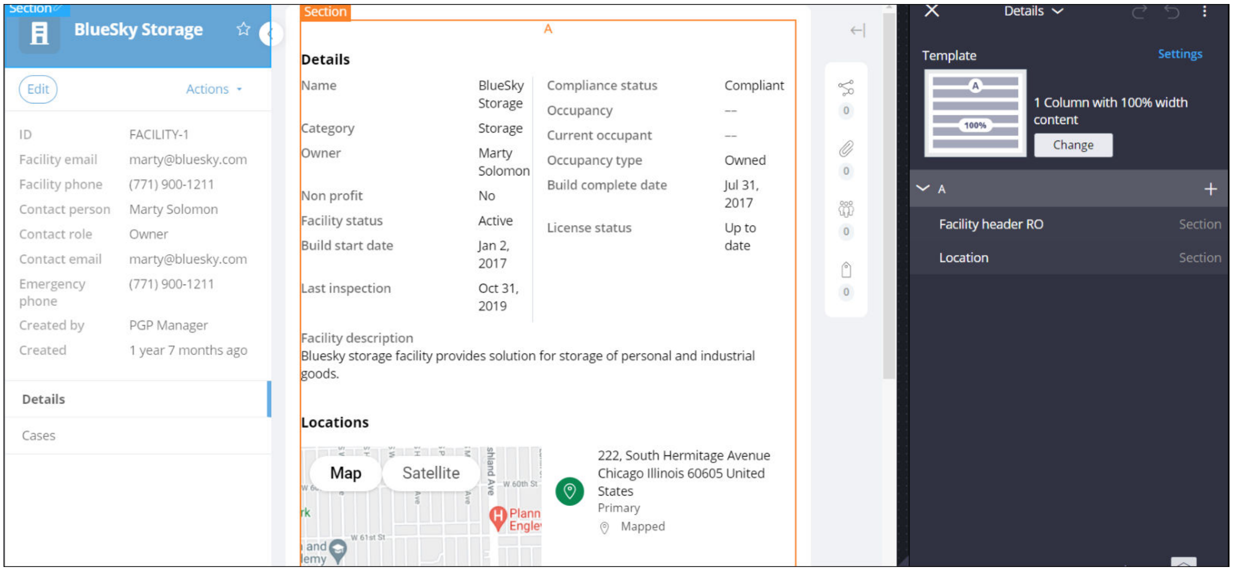


Adding a field to the facility view

Add new fields to the existing facility view.

Add a field, for example, Permission Date to the facility view.

1. To add the field, navigate to the Details wrapper section and choose the appropriate section to show the field, for example, the **Facility header RO** section.

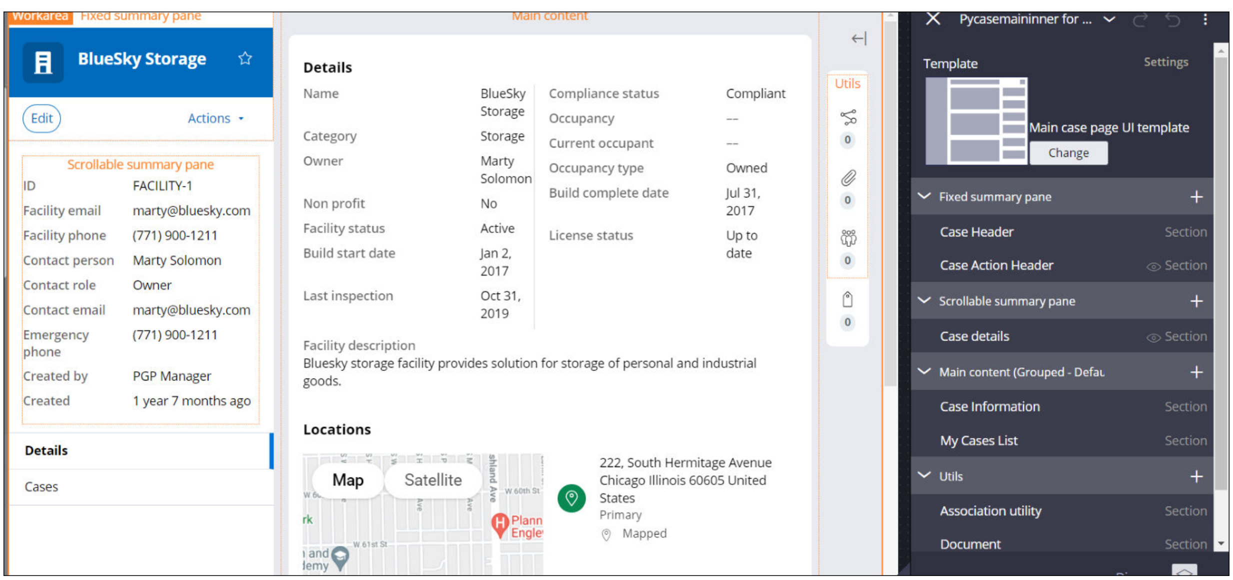


2. Add the new field along with the existing ones.

Showing captured list details in the facility view

Show the captured list, for example, InspectionList details in the facility view.

1. Create a view or section in *PegaPS-Work-Entity-Facility-View* class.
2. Include the section in the Main content region of the **pyCaseMainInner** view.



Search entities

Search for information across multiple record types. The search entities feature returns real-time results in entity data.

You can directly access the search page of an entity from the navigation panel. Each entity has its own landing page for search. You can build a landing page for an entity using the associated harness.

The following table shows the list of harnesses for each entity:

Entity	Harness class	Harness name
Person	PegaPS-Data-Portal	Person
Business	PegaPS-Data-Portal	Business
Facility	PegaPS-Data-Portal	Facility
Vehicle	PegaPS-Data-Portal	Vehicle
Household	PegaPS-Data-Portal	Household

The following table shows a list of data pages and report definitions that you can use for each entity search from the landing pages.

Entity	Data page	Report definition
Person	D_PersonList	PersonList
Business	D_BusinessList	BusinessList
Facility	D_FacilityList	FacilityList
Vehicle	D_VehicleList	VehicleList
Household	D_SearchHouseholdList	SearchHouseholdList

Each harness contains two areas, the header area and the content area. The Content region holds the section which shows the entities in a grid. The following are the sections for each entity:

Entity	Section Class	Section name
Person	PegaPS	SearchPersonTable
Business	PegaPS	SearchBusinessTable
Facility	PegaPS	SearchFacilityTable
Vehicle	PegaPS	SearchVehicleTable
Household	PegaPS	SearchHouseholdTable

Introducing new search criteria

Complete the following steps to introduce new search criteria for an entity:

1. Open the data page and the report definition of the entity.
2. Add the new search criteria as a parameter.
3. Update the filer logic of the report definition with the appropriate relationship.
4. Add the property in the **Edit columns** list of the report definition.
5. In the section, pass the search text to the newly added parameter of the data page. If you cannot view the parameter, reselect data page.
6. Add the property as a column to the table in the section.

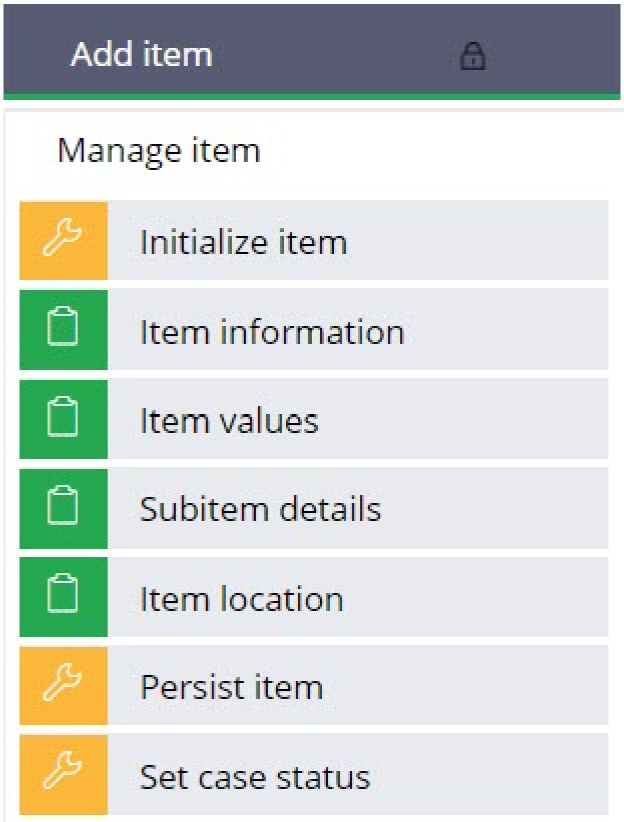
Item entity

Pega Government Platform provides data support to collect data about item in the form of Item Entity.

The Item Entity feature contains a persistent datastore and three supporting case types to manage the Item Entity datastore.

Add Item case type

Add an item case type. Using the *PegaPS-Work-Entity-Item-Add* case type, you can introduce a new entity of the type Item into the system.

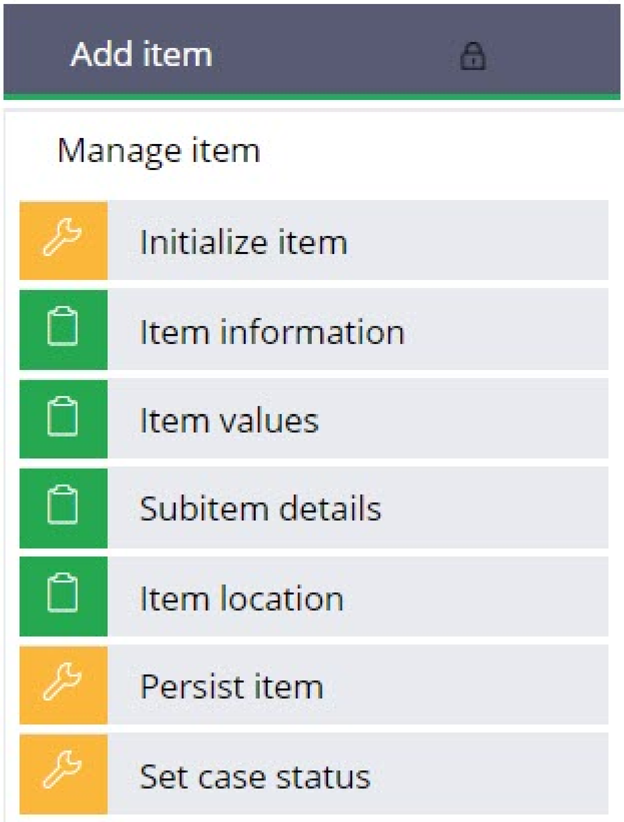


Add item case type

The Add Item case type checks for duplicate item entries and notifies about the same. The case type persists the item, record along with the supported data like item values, subitem details, and item location.

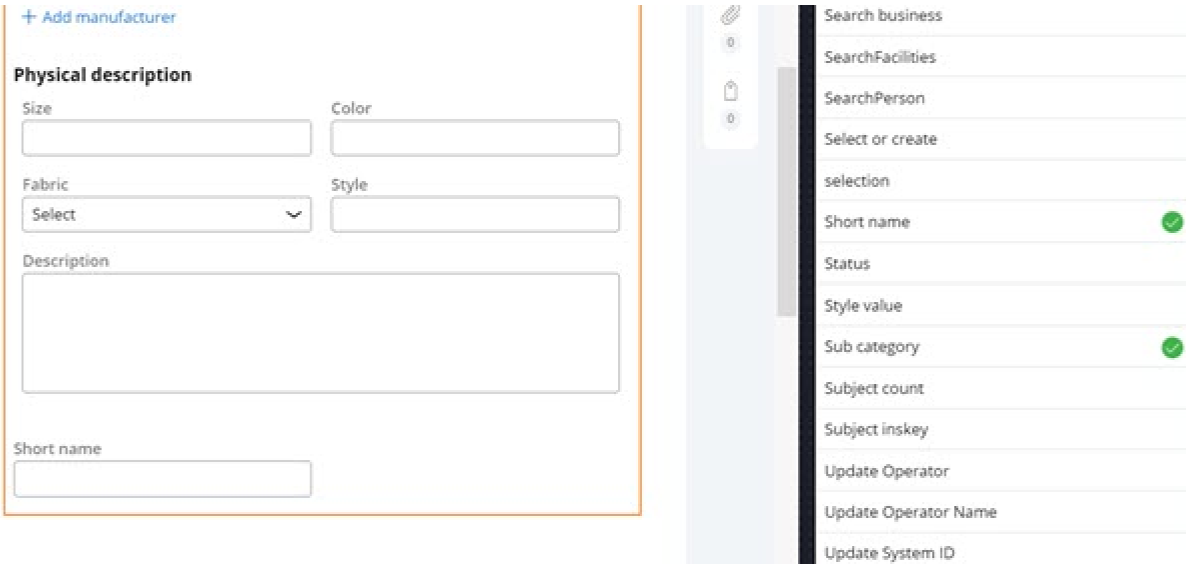
Adding a new field to the item intake screen

Capture a new field in the item intake screen. You can add a new data field or property and extend the existing item intake screen.



Add new field in item case type

1. In the Item data type, create a field. For example, **Short name**.
2. Run the Item case type, and then navigate to the **ItemInfo** view.
3. Click the **Add** icon of Short name, and then you can see the field.



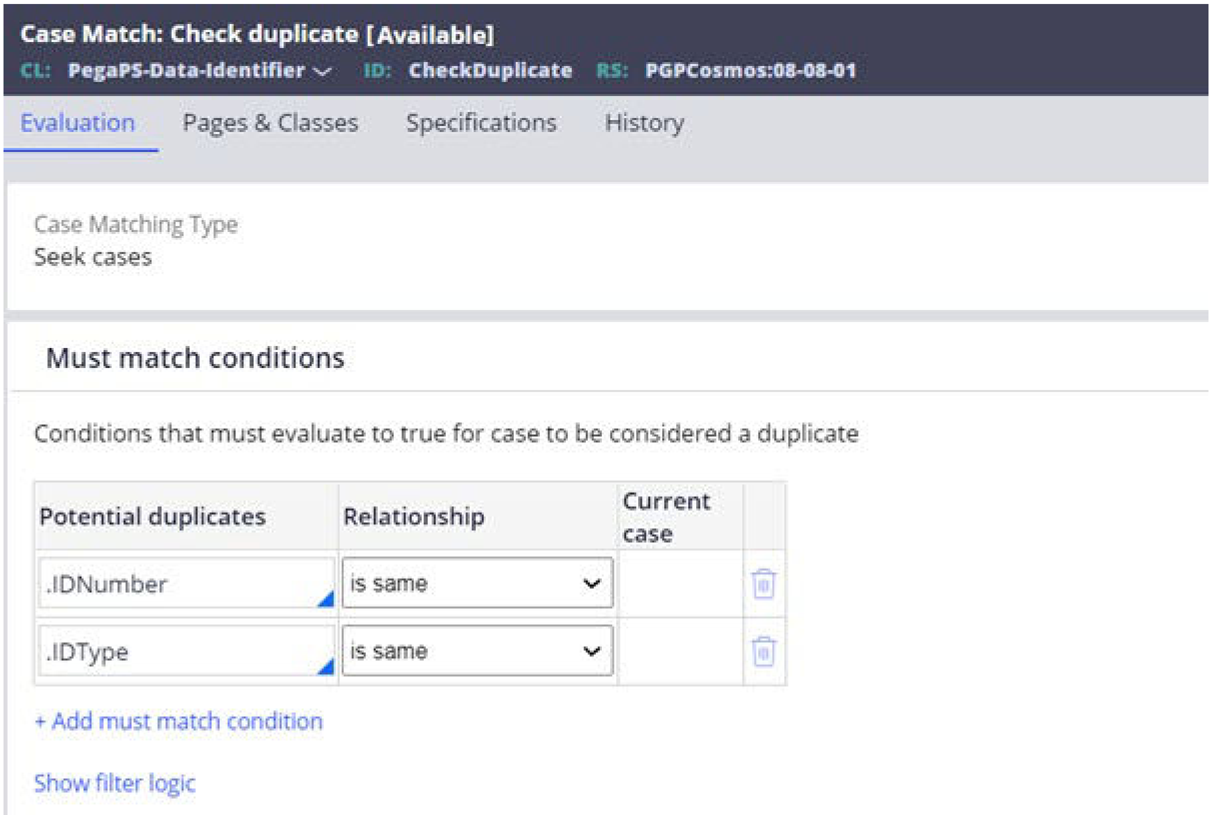
Add new field - item intake form

> **Result:**
>
> The new field is automatically saved in the item table.

Updating duplicate check validation for a field

Update the existing duplicate check fields with new fields.

1. Open the *CheckDuplicate (PegaPS-Data-Identifier)* case match rule.
2. Add a new field by clicking **Add must match condition.**
3. Update the filter logic accordingly.



Duplicate check validation

4. Click **Save as**.
5. In the **Context** section, select an application.
6. In the **Add to ruleset** area, select a ruleset and the ruleset version.
7. Click **Create and open**.

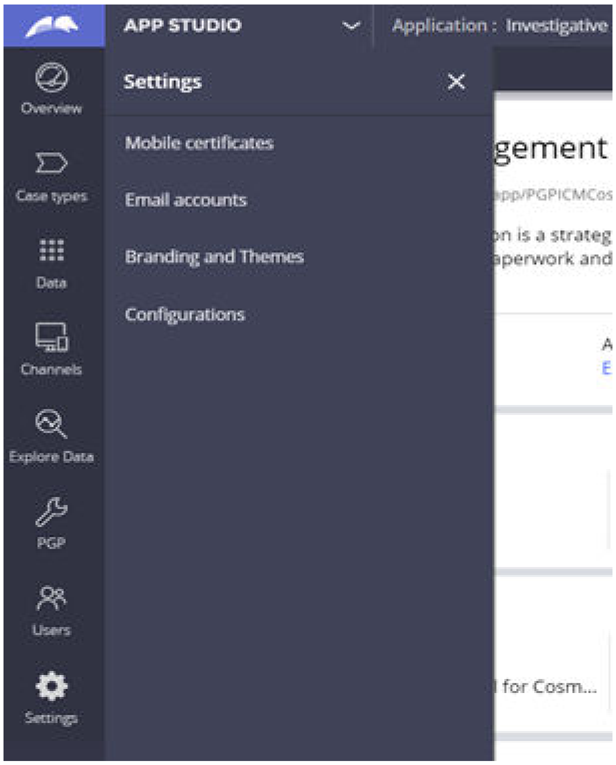
Enable or disable duplicate check

Duplicate check for the item is always enabled. You can enable/disable the duplicate check from the configuration in App studio. If duplicate check is disabled, On creation of new item, duplicate check will not be happened and vice versa.

Follow these steps to enable or disable duplicate check:

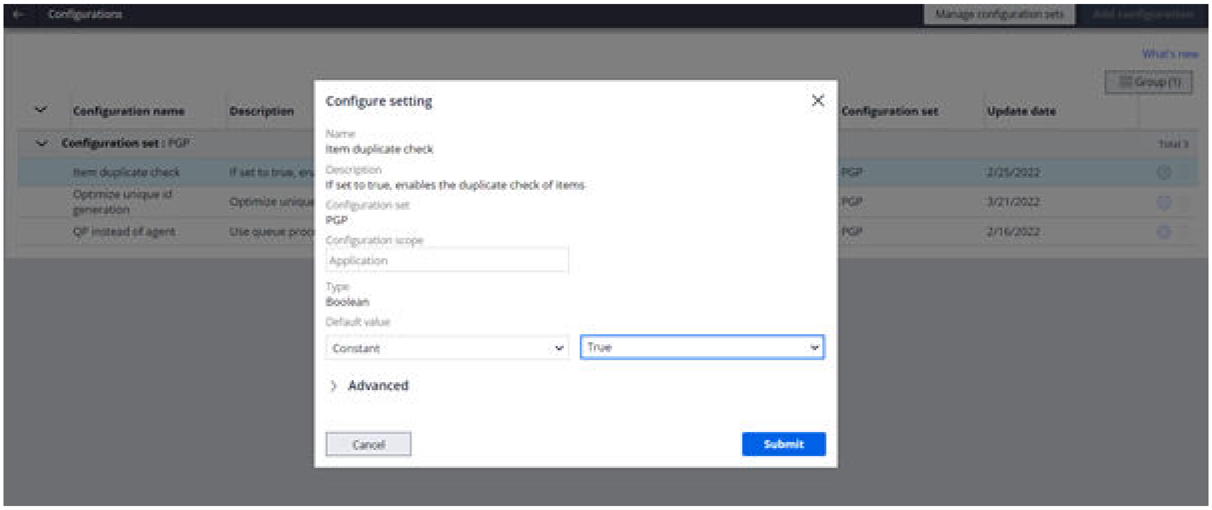
1. Login to Pega Government Platform with admin credentials and switch to App studio.

2. From the left pane, click **Settings** > **Configuration**.



Enable/disable duplicate check

3. Click **gear** icon of **duplicate check** row.
4. Change the value of constant dropdown. Select **True** to enable the duplicate check else **False** to disable the duplicate check.



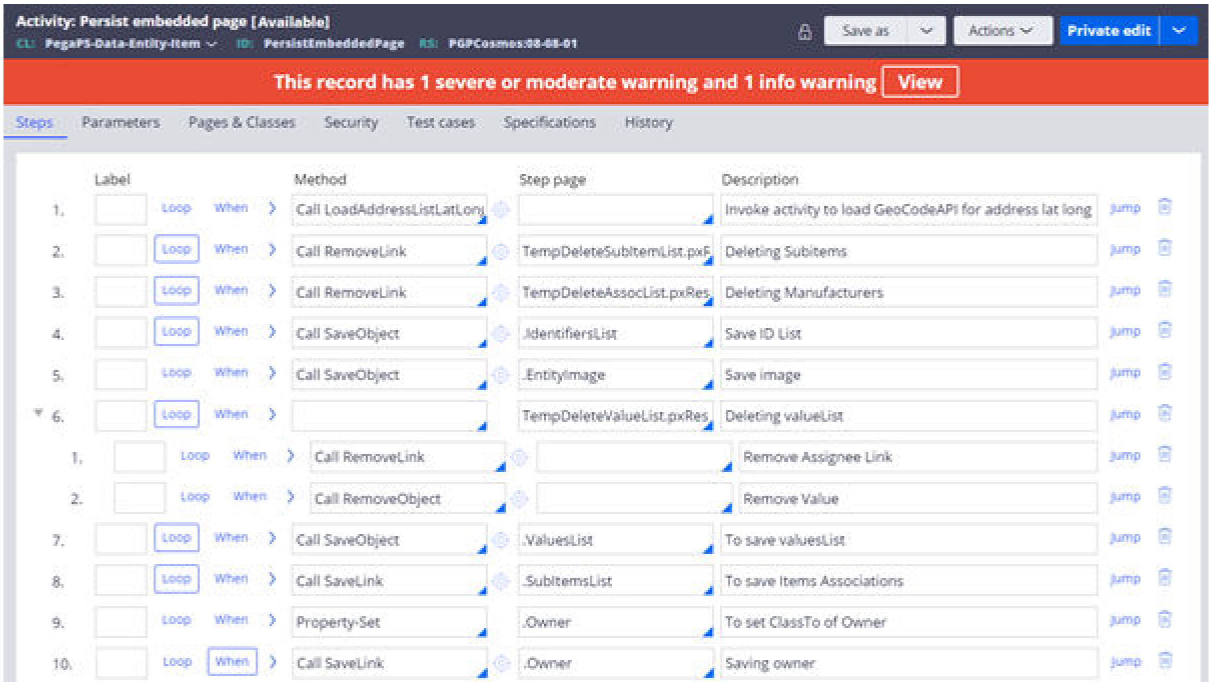
Configuration setting to enable/disable duplicate check

Adding a new list item

Update an existing list of items with new items.

Add a new list item, for example, SellerList and persist it.

1. In Dev Studio, in the PegaDATA database, create the SellerList data type with the following properties: *pyID* (Primary key), *EntityID*, and *EntityType*.
2. Add other properties that are related to the SellerList, such as the Seller name, decription, and so on.
3. In the Item data type (*PegaPS-Data-Entity-Item*), create a field of type page list of SellerList data type class.
4. Update the *PersitEmbeddedPage (PegaPS-Data-Entity-Item)* activity with a new step that loops the *SellerList* property, and then invoke the activity *SaveObject* by passing the *EntityID* and *EntityType* parameters similar to *IdentifierList*.

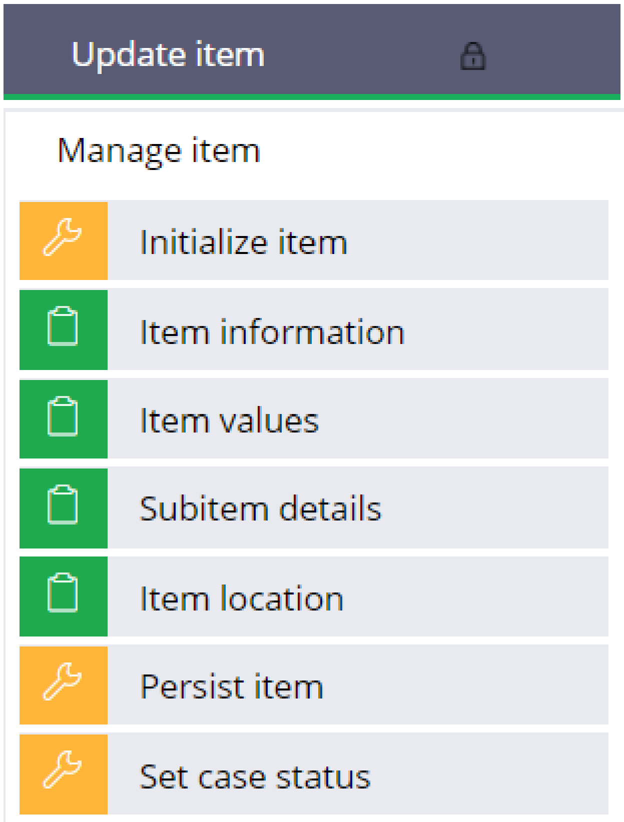


Adding a new list item

5. Create a UI to capture the SellerList details.

Update Item case type

Update the existing *Item* case type. Using the *PegaPS-Work-Entity-Item-Update* case type, you can update the details of an existing entity.



Update item case type

You can make changes to the item data and submit them. The details persist after the duplicate validation check ensures that there are no duplicates.

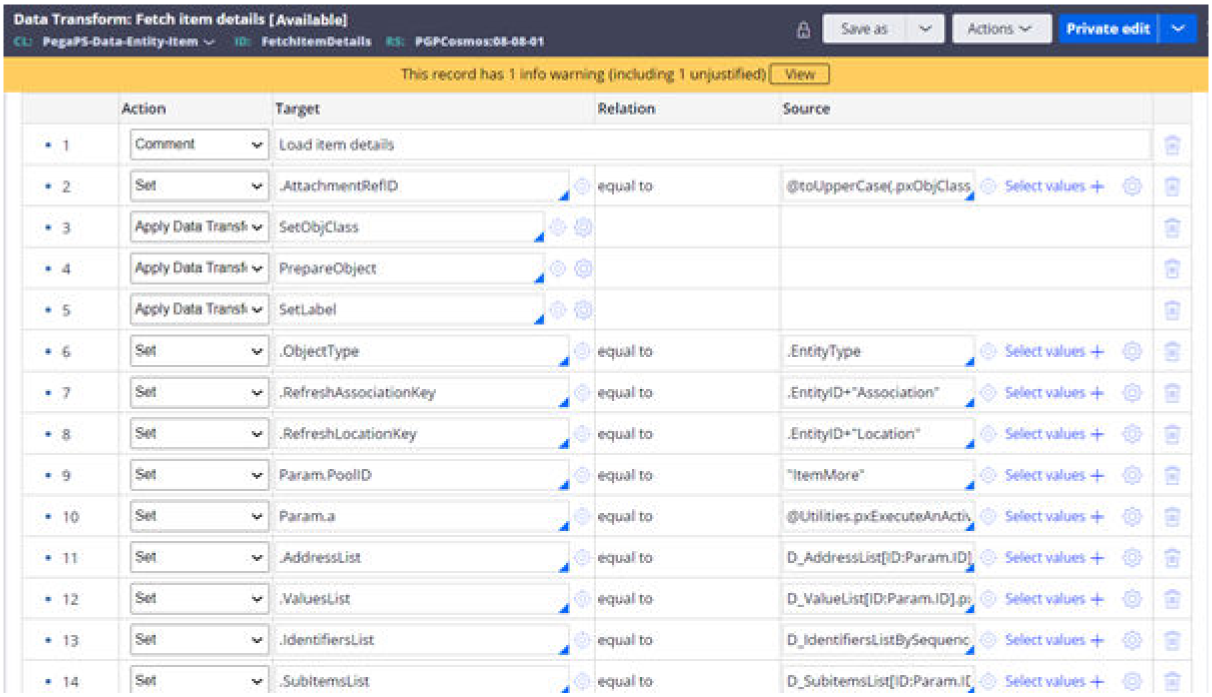
The *D_Item* data page fetches the entity details along with associated data like item values, subitems, and so on.

Updating an existing list property

Update an existing list property, for example, SellerList .

You can update the existing list properties for the item entity. Fetch the SellerList details to update the existing list of SellerList that are captured as a part of the Add Item procedure.

1. Update the *FetchItemDetails (PegaPS-Data-Entity-Item)* data transform.
2. Add a step similar to ValuesList or AddressList to set the details using the corresponding SellerList data page of type: List.

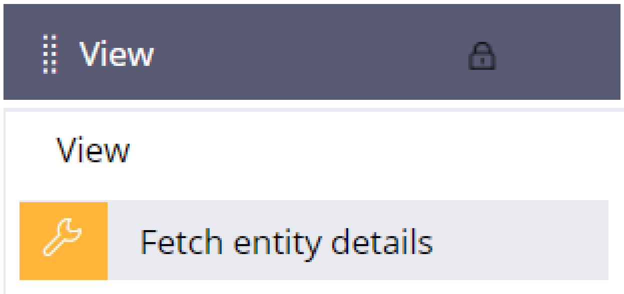


Updating a existing list property for Item entity

> **Result:**
>
> The Update case populates the details and any changes made are persisted.

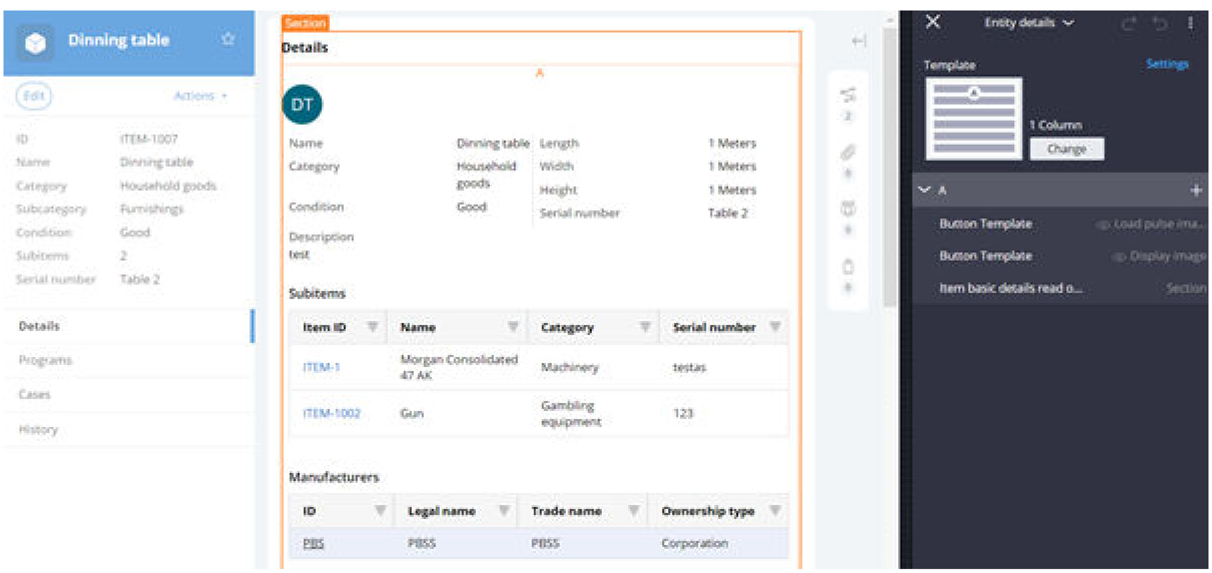
View Item case type

View the details of a item entity. Using the *PegaPS-Work-Entity-Item-View* case type, you can view the complete details of an existing item entity.



View item case type

The *EntityDetails (PegaPS-Data-Entity-Item)* wrapper section contains all the item related views or sections.



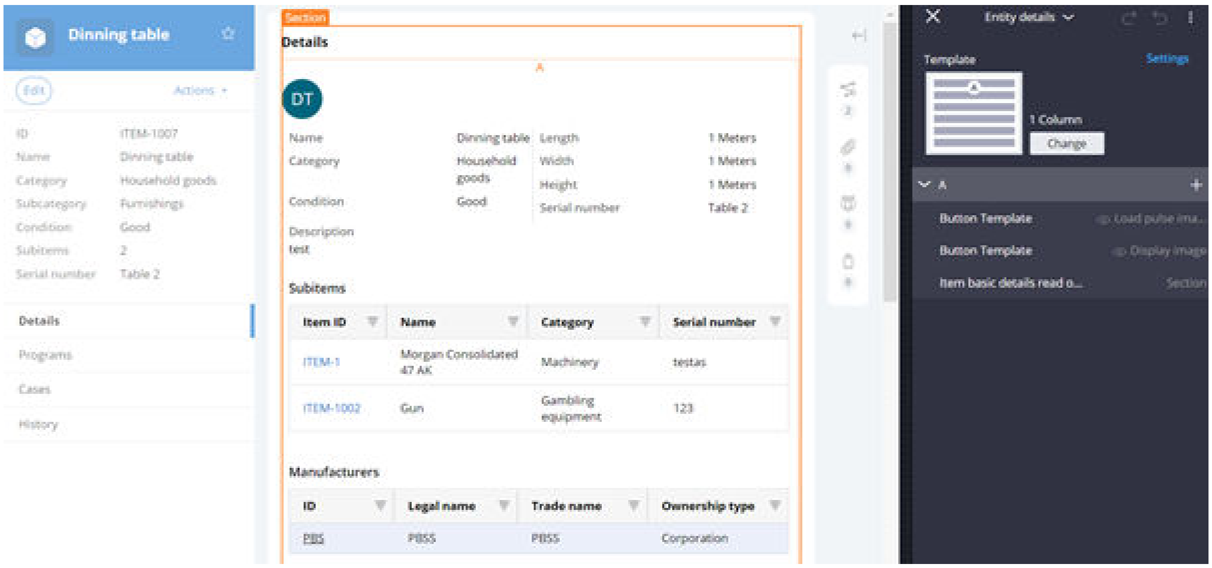
View item case type

Adding a field to the item view

Add new fields to an existing item view.

Add a field, for example, Short name to the item view.

1. To add the field, navigate to the *EntityDetails* wrapper section and choose the appropriate section to show the field, for example, the Entity details section.



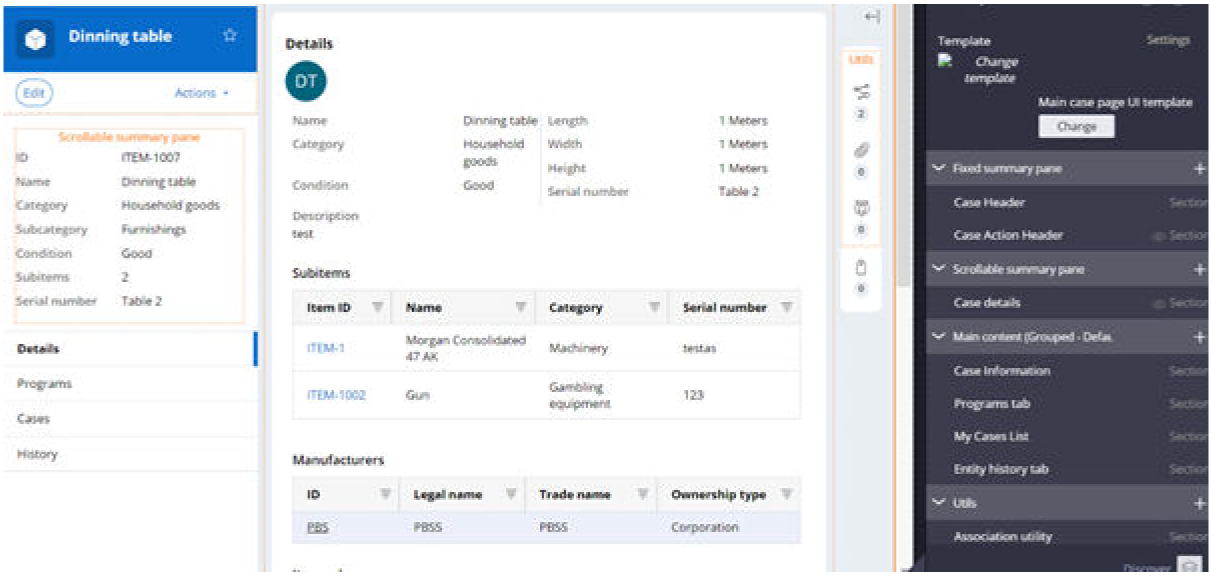
Add field in item view

2. Add the new field along with the existing ones.

Showing captured list details in the item view

Show the captured list, for example, SellerList details in the item view.

1. Create a view or section in the *PegaPS-Work-Entity-Item-View* class.
2. Include the section in the Main Content region of the *pyCaseMainInner* view.



Showing captured list details

Copy item to a new case type

If you want to create a new item which is similar to the existing item with some minor changes, then instead of creating a new item and filling up all the details, in a single click you can copy the details to the new case.

Click Action > Copy from the item screen which you want to copy. A new item case screen pops up with the item details from which you performed the action.

Entity attachments

Attach documents to the entity profile. You can view, download, update, or delete these documents at anytime.

In government applications, various entities hold different documents which you can view or refer in other cases. For example, a Person entity can have a passport, a birth certificate, and so on, attached to their profile. If required, you can refer these attachments in the license case.

The following are some of the features of entity attachments:

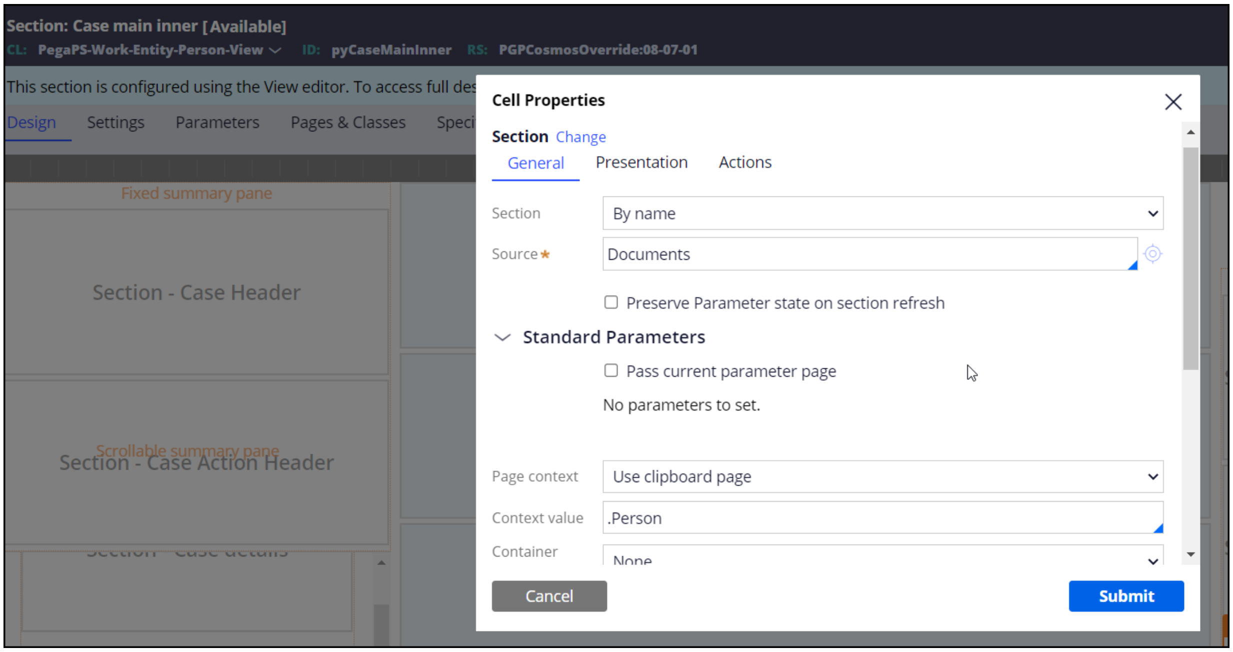
- Entity attachments offers support for entities like person, business, facility, vehicle, and household.
- When you add a new attachment, PGP creates a new document case *(CL: PegaSocial-Document)* .
- The *AttachmentRefID* property of the entity is set as the parent instance handle key of the document case. Using *AttachmentRefID*, the entity view screen displays the attachments of an entity.

Extending attachments for a new entity type

Hold documents for the entities of a new entity type in the implementation layer.

1. In **pyCaseMainInner** section of entity view class, in the **Utils** area, add a **Documents** section with the Page context as Use clipboard page and context value as Entity Page.

   For example: For Person entity, in the pyCaseMainInner section *(CL:PegaPS-Work-Entity-Person-View)*, in the Utils region, add a Documents section with Page context as Use clipboard page and context value as .Person.



2. Before persisting the entity, set the *AttachmentRefID* property. Set this property in step 3 of the *PrepareObject (CL:PegaPS-Data-Entity)* data transform.

> **Note:** If this setting is not getting called for your new entity, then before persisting, set the *AttachmentRefID* property to ‘ @toUpperCase(.pxObjClass)+" "+.EntityID ‘

3. Similarly, during the fetching of entity details, set the *AttachmentRefID*. In the data transform of the new entity's lookup datapage, set *AttachmentRefID* to ‘ @toUpperCase(.pxObjClass)+" "+.EntityID ‘. Refer *FetchPersonDetails (CL:PegaPS-Data-Entity-Person)* step 2.

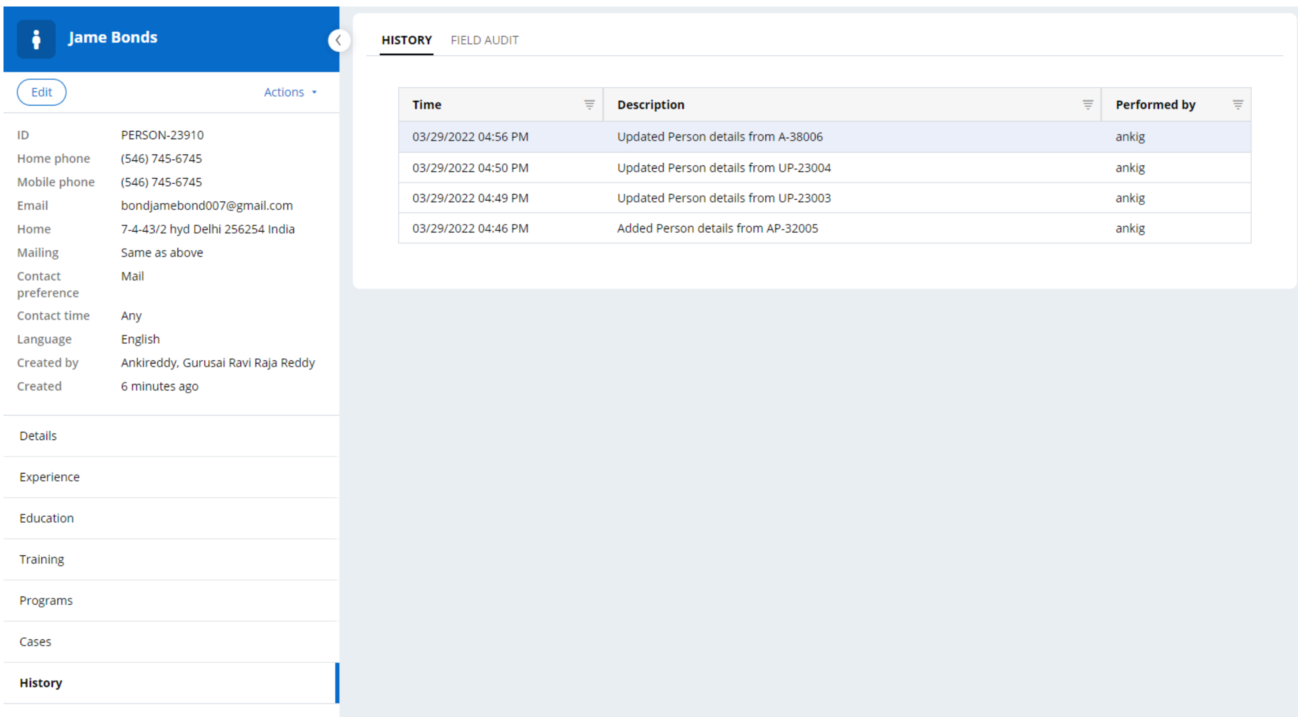
Entity history and field audit

Pega Government Platform provides support for History and Field auditing for necessary fields, for entities.

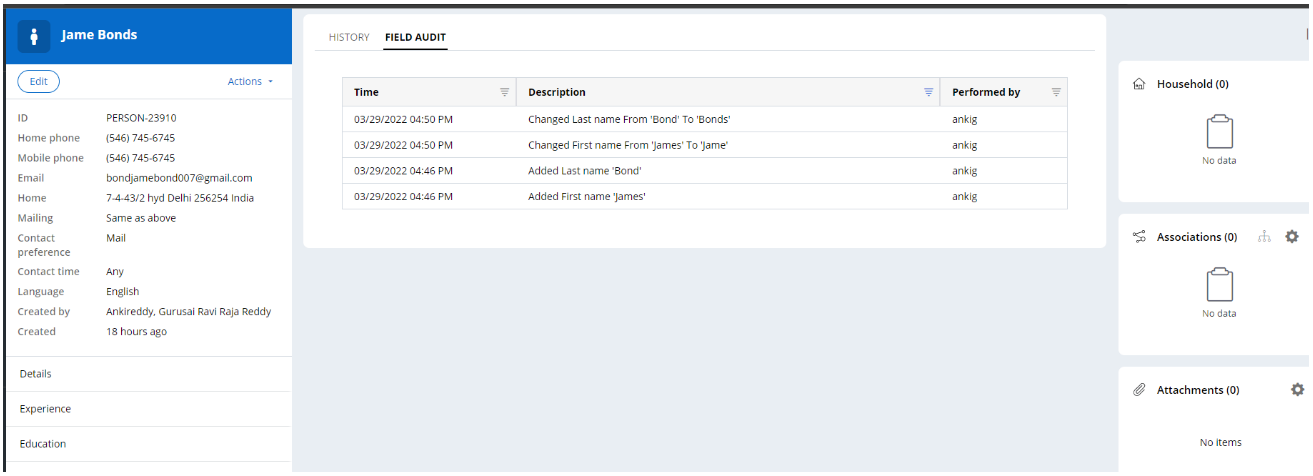
The following are some of the features of entity history and field audit:

- The history of an entity shows details such as by whom and when it is updated/ added and the case where this action is performed.
- Field Audit of an entity shows previous values and current values of a property along with time and user.

For example, the following images show the history and field audit of a person entity.



Entity history



Field audit

- **Extend History and Field audit to a new entity**
- **Extend field audit to a new field of an existing entity**

Extend History and Field audit to a new entity

To add history to a new entity open **pyCaseMainInner** of entity view class and add **Entity History** section with the Page context as Use clipboard page and context value as Entity Page.

> **Note:** Use SaveEntity(CL:*PegaPS-Work*) to Persist the entity.

The next step is to create a report definition for history in entity history-data class, save as PersonHistory(CL:*History-PegaPS-Data-Entity-Person*), and add the report to **D_EntityHistory**" data page as a source.

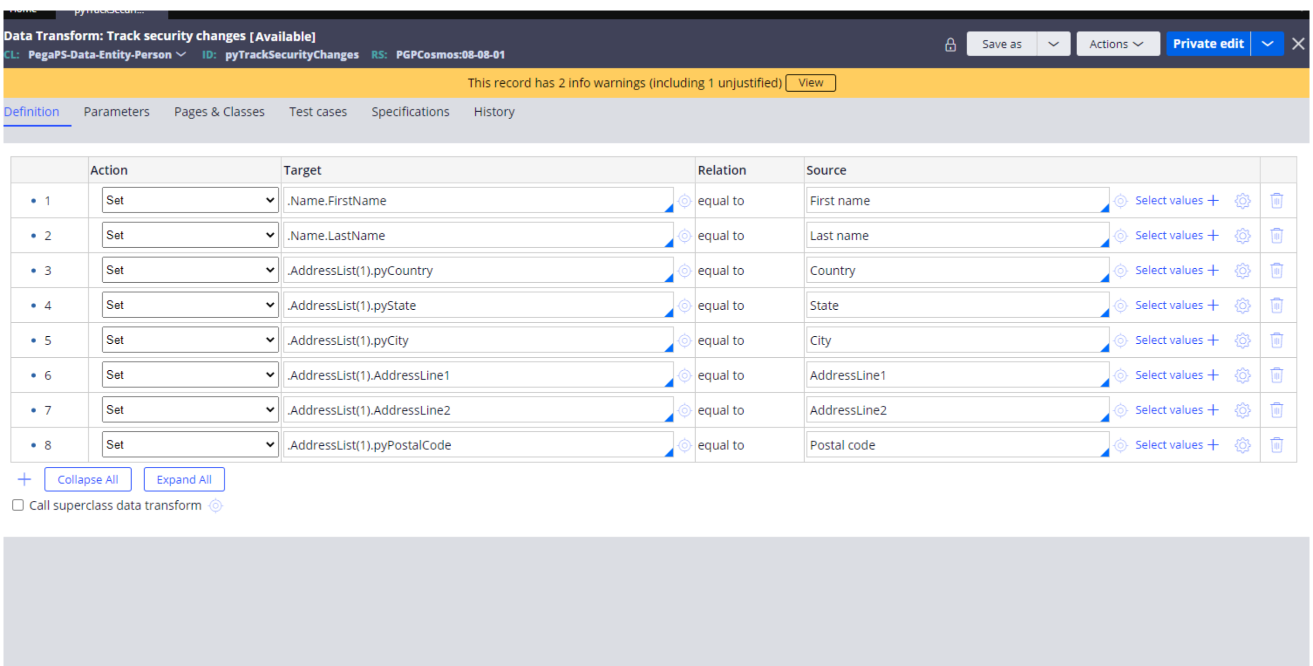
Similarly, create a report definition for field audit in entity history-data class, save as PersonFieldAudit (CL:*History-PegaPS-Data-Entity-Person*), and add the report to **D_EntityFieldAudit** data page as a source.

For field auditing, create a declare trigger on data-class of the entity, set **Trigger when an instance is** dropdown to **Saved**. Under Trigger activity, set **Name** to **TrackSecurityChanges** and set **Execute** dropdown to immediately. And create **pyTrackSecurityChanges** data transform with data-class of the entity and add fields to audit.

Extend field audit to a new field of an existing entity

For example, to audit a new field, say **.EyeColor**, for **Person Entity** open *pyTrackSecurityChanges* (CL:*PegaPS-Data-Entity-Person*) data transform and add **.EyeColor** in target, add label for **EyeColor** in source.

To audit page list property fields like country in **Addresslist** (Page list Property), follow the image.



Field audit

Entity merge

Entity merge in Pega Government Platform allows you to merge two or more entities into a single entity which acts as a master.

Architecture

Merge entities consists of two parts:

- Configuring Scalar and List merge attributes (Properties) in the design time.

- Executing the merge for the selected entities at run time.

Merge attributes can be configured from App Studio by navigating to the **PGP** > **Merge entities** landing page.

Scalar attributes can be configured by providing the following details:

- Name of the property
- Property supported for merge and
- Data type of the property

List attributes can be configured by providing the following details:

- Name of the attribute
- Data page that fetches the list items and
- Properties to be shown to the user

Merge Entities

In the Merge entities case type, user can select only one of the values for scalar attributes from of the selected entities to be the value of the master entity record.

For list attributes, Users can select any record to be part of the master entity without any restriction.

Technical details for merging entities

To support merging of an entity, 2 properties are added to the entity data model and corresponding columns are also added to the respective entity database table.

- MergeStatus (Possible values: Active/Inactive)
- MergedTo

For example, let's assume below are the entities before merge

Entity ID	Merge Status	Merged To
PERSON-1	--	--
PERSON-2	--	--

Now user selects PERSON-1 as a master entity and wants to merge PERSON-2 into PERSON-1, up on completion, the entities will have the following data to the above mentioned two properties.

Entity ID	Merge Status	Merged To
PERSON-1	Active	--
PERSON-2	Inactive	PERSON-1

Along with the above values to support the unmerge functionality, the Master entity would have the details that it possesses before the merge in the Snapshot (**PegaPS-Data-Snapshot**) embedded page of the entity.

Technical details for merging list items

The design of merging the list items like Address has a different way of handling the merge compared to merging of entities.

For handling the merge of list items 2 properties are introduced to the data model.

- MergeStatus (Possible values: MasterInactive/Inactive/Active)

- **MasterInactive:** Used to inactivate the master list items (only if not selected), these are omitted and not shown in master profile.
- **Inactive:** Used to inactivate the duplicate list items (irrespective of selection is made or not.)
- **Active:** Used to activate the list items that are selected from the master items.

- RefID

For example, let us assume below are the addresses of the entities in the system.

Address ID	Entity ID	Merge Status	RefID	User selection
Address-1	PERSON-1 (Master)	--	--	Selected by user
Address-2	PERSON-1 (Master)	--	--	Not selected
Address-3	PERSON-2 (Duplicate)	--	--	Selected by user
Address-4	PERSON-2 (Duplicate)	--	--	Not selected

In the above scenario, one address from each entity is selected by the user and below are the address details after the merge.

Address ID	Entity ID	Merge Status	RefID
Address-1	PERSON-1 (Master)	Active	--
Address-2	PERSON-1 (Master)	MasterInactive	--
Address-3	PERSON-2 (Duplicate)	Inactive	--
Address-4	PERSON-2 (Duplicate)	Inactive	--

Address ID	Entity ID	Merge Status	RefID
Address-5	PERSON-1 (Master)	Active	Address-3

Below is the explanation for each address how its handled in the above scenario.

1. Address-1: This originally belongs to master entity and it has been selected by the user, so the status is set to Active.
2. Address-2: This originally belongs to master entity and it has not been selected by the user, so the status is set to MasterInactive (this is not shown in master profile going forward)
3. Address-3: This originally belongs to duplicate entity, so the status is set to Inactive.
4. Address-4: This originally belongs to duplicate entity, so the status is set to Inactive.
5. Address-5: This is a new address added to master by cloning the **Address-3** which is a selected address from the duplicate entity and the status is set to Active. The RefID property is set to the value Address-3 to indicate that it is cloned from Address-3.

The key concept is all the selected list items from the duplicate are cloned with new ID's and added to the master.

Creating new entities

What are PGP entities?

PGP entities are a collection of robust data structures that model data elements commonly used in government processes. The PGP entities are persistent data classes that come pre-configured as a part of PGP.

- Person
- Business
- Vehicle

- Facility
- Household

Entity data structures serve two distinct purposes within PGP:

1. Entity instances are persisted to a data store like any local data type or data table
2. Entity data classes are used as a type for embedded pages defined on the PGP work ancestor to support case processing

Persistent data store

An entity data class (Data- class) is managed (curated) in an independent data store (database table) by the *Add, Update, View and Search* case types (Work- classes).

Case type embedded page

An entity data class is also used as a type for embedded pages incorporated into the PGP work ancestor. These embedded pages are used by the PGP component processes to implement PGP features.

PGP Entities follow a pattern of Persistent Data curated by Business Processes. This pattern allows for the possibility that in a customer implementation the entity datastore may be mapped to customer resource that is external to Pega and PGP. In this pattern a persistent datastore descended from *PegaPS-Data-Entity* is added, updated, viewed, and searched by Case Types descended from *PegaPS-Work-Entity*.

New Entity overview

This guide will step through the process of extending the PGP Entity data structure addding a new entity called *Item* built in a PGP implementation layer.

In the following examples *PGPImp* is the organization name of the implementation application and *DemoPGP* is the name of the implementation application. The class *PGPImp-DemoPGP-Work* inherits (directed) from the *PegaPS-Work* class.

Create the Persistent Datastore

PGPImp-DemoPGP-Data-Entity-Item

- Properties relevant to the entity
- View(s) for editing, reviewing
- Data Pages for retrieving
- Optional: Case match rule to avoid duplicates, and validation rules for data

Extend the Work Class Properties

In the primary work class of the implementation application, *PGPImp-DemoPGP-Work,* add a page property of type *PGPImp-DemoPGP-Data-Entity-Item* to hold *Item* data during case management processing.

Create the Data Management Case Types

- *PGPImp-DemoPGP-Work-Entity-Item-Add*
- *PGPImp-DemoPGP-Work-Entity-Item-View*
- *PGPImp-DemoPGP-Work-Entity-Item-Search*
- *PGPImp-DemoPGP-Work-Entity-Item-Update*

Enable for App Studio

- Use views and design templates to construct the user interface
- Catalog the new Entity's rules in Relevant Records so they will appear in the App Studio smart prompts
- Configure whether case types will appear on *+Create* nav

Development steps

While it is possible to do some of this work in App Studio, the approach discussed here is based on a Dev Studio experience. App Studio hides some development details, like class names and rulesets, in order to present a development environment that can focus on case types and business processes, but for this exercise we need full control over those details.

Create persistent datastore

Create a persistent data type and supporting rules for the new entity.

Create Data Type Ancestor

Add an abstract data class to the implementation layer to leverage the Enterprise Class Structure pattern and provide extension points for reusable rules common to the *Entity* implementation layer data types.

1. Use **Create** > **SysAdmin** > **Class** to create a new class
    a. For the *Label* use *Entity*
    b. For the *Class Name* use *PGPImp-DemoPGP-Data-Entity*
    c. Create and open
    d. For *Select class type* use *Abstract*
    e. For *Created in version* use the current version
    f. For *Parent class (directed)* use *PegaPS-Data-Entity*
2. Save the rule.

Create Data Type

1. Use **Data types** > **Data types** > **Add data type wizard** to create the new *Item* data type and supporting rules.
    a. Set the *Label* as *Item*
    b. Add an appropriate *Description* for the class
    c. Under Advanced set the parent class to *PGPImp-DemoPGP-Data-Entity*
    d. *Submit* to create the new *Item* data type
2. Configure the *Item* data type
    a. Use the *Data model* tab, add properties to the *Item* data type
        1. *EntityID* of type *Text*
        2. *pyID* of type *Text*

3. Add additional properties as needed

b. Under the *Sources* tab *Create a local source*
c. Select *pyID* as the Key *(Use as key)*
d. *Submit* to create a local source for the Item data type

Create View UI for the New Data Type

Build the basic data layer UI rules to present the data of the new *Item* data type.

1. Create View *ItemDetail* with Applies-To of *PGPImp-DemoPGP-Data-Entity-Item*
   a. Place all the relevant properties from the *Item* data type
2. Create View *ItemDetailRO* with Applies-To of *PGPImp-DemoPGP-Data-Entity-Item*
   a. Place all the relevant properties from the Item data type, with the *Presentation -> Edit Options* set to *Read-Only*.

Extend the work ancestor class

Add a Page property to the implementation layer work ancestor of type *PGPImp-DemoPGP-Data-Entity-Item* to hold an *Item* instance during case management processes. Create a new Page property *.Item* of type *PGPImp-DemoPGP-Data-Entity-Item* with Applies-To *PGPImp-DemoPGP-Work*.

1. Use **Create** > **Data Model** > **Property** to add a new property
   a. For the *Label* use *Item*
   b. For the *Apply to* use *PGPImp-DemoPGP-Work*
   c. Create and open
   d. Change the Property type to Single Page
   e. Select *PGPImp-DemoPGP-Data-Entity-Item* as the *Page definition*
   f. Save the rule.

Review entity data type rules

Switch to App Explorer (App) and show *PGPImp-DemoPGP-Data-Entity-Item*. Review all the rules created for the *Item* data entity.

Applies -to	Rule Name	Rule Type	Description	Comment
	PGPImp-DemoPGP-Data-Entity	Class	Abstract	
	Item		Data Type	
	PGPImp-DemoPGP-Data-Entity-Item	Class	Concrete	Key pyID
	PGPImp-DemoPGP-Data-Entity-Item	Database Table	Persistence	
PGPImp-DemoPGP-Data-Entity-Item	ItemName	Property	Text	
PGPImp-DemoPGP-Data-Entity-Item	... more properties	Property	Text	
	D_Item	Data Page	Page	Source=Lookup
	D_ItemList	Data Page	Page List	Source=Report Definition
	D_ItemSavable	Data Page	Page	
PGPImp-DemoPGP-	DataTableEditorReport	Report Definition		All Item Properties

Applies -to	Rule Name	Rule Type	Description	Comment
Data-Entity-Item				

Create Case types

Create abstract support work classes

When a new implementation layer is generated by the New Application Wizard it only creates descendants for the selected concrete classes. Manually add the missing abstract work classes to leverage the Enterprise Class Structure pattern and provide extension points for reusable rules common to the *Entity* and *Item* implementation layer work types.

1. Use **Create** > **SysAdmin** > **Class** to create a new class.
   a. For the *Label* use *Entity*
   b. For the *Class Name* use *PGPImp-DemoPGP-Work-Entity*
   c. Create and open
   d. For Select class type use Abstract
   e. For Created in version use the current version
   f. For Parent class (directed) use PegaPS-Work-Entity
   g. Save the rule
2. Use **Create** > **SysAdmin** > **Class** to create a new class
   a. For the *Label* use *Entity Item*
   b. For the *Class Name* use *PGPImp-DemoPGP-Work-Entity-Item*
   c. Create and open
   d. For *Select class type* use *Abstract*
   e. For Created in version use the current version
   f. For Parent class (directed) use *PGPImp-DemoPGP-Work-Entity*
   g. Save the rule

Create data management case types

Use *Case types -> +Add a case type* to add new case types to the implementation layer. Use the Advanced Settings to select the directed and patterned ancestors for the new case type.

Choose the case type name carefully as it will be used to form the work class name for the case type. After the case type has been created, you may choose to change the *pyLabel* for the case type rule to something more specific.

The lists of ancestor classes to choose from may not show recently added abstract classes unless you have logged out since they were added or otherwise reset the cache.

Create Add case type

In PGP the *Add* case type for Entities collects data from the operator in a Page embedded on the work class. At an appropriate step in the case life cycle a PGP Persist component is placed which writes out the data from the embedded page on the work to a persistent data class using the persistence configuration from the *Database Table* rule for the embedded page's class.

1. Use *Case types -> +Add a case type* to create a new case type named *Add* (plan to change the label for the case type rule later)
    a. Expand the Advanced section and specify the ancestry
    b. Use *PGPImp-DemoPGP-Work-Entity-Item* as the directed ancestor
    c. Use *PGPImp-DemoPGP-Work-Entity-Item* as the patterned ancestor
2. Create a Workflow for the case type
3. In the default *Create* stage
    a. Use +*STEP* to add a Collect Information step under the *Create* stage
    b. Name the step *Capture Item Details*
    c. From the step parameters panel (right) click *Configure the View*
        1. In the View Configuration add the *Item* field as a field group
        2. Select *ItemDetail* from the View dropdown to use it as the View for the *Item* field group

4. Use +*STAGE* to add a new stage named *Review*
    a. Use +*STEP* to add a Collection Information step under the *Review* stage named *Review Item Details*
    b. From the step parameters panel (right) click *Configure the View*
        1. From the step parameters panel (right) click *Configure the View*
        2. Select *ItemDetailRO* from the View dropdown to use it as the View for the *Item* field group
    c. Use **+STEP** > **...More** > **Processes** and select *Persist object*
    d. From the step parameters panel (right) configure the *Persist object* component
        1. For *Type* use *Entity*
        2. For *Property* use "*.item*" (double quotes are significant)
5. Change the case type rule label for *PGPImp-DemoPGP-Work-Entity-Item-Add* from *Add* to *Add item*
6. Save the Case

Create Update case type

In PGP the Update case type for Entities solicits changes to the entity data from the operator and captures these changes in a Page or Page List embedded on the work class. At an appropriate step in the case life cycle a PGP Persist component is placed which writes out the data from the embedded page on the work to a persistent data class using the persistence configuration from the Database Table rule for the embedded page's class.

1. Use **Case types** > **+Add a case type** to create a new case type named *Update* (plan to change the label for the case type rule later)
    a. Expand the Advanced section and specify the ancestry
        1. Use *PGPImp-DemoPGP-Work-Entity-Item* as the directed ancestor
        2. Use *PGPImp-DemoPGP-Work-Entity-Item* as the patterned ancestor
2. Create a Workflow for the case type
3. In the default *Create* stage
    a. Use +*STEP* to add a Collect Information step under the *Create* stage

   b. Name the step *Edit Item Details*
   c. From the step parameters panel (right) click *Configure the View*
      1. In the View Configuration add the *Item* field as a field group
      2. Select *ItemDetail* from the View dropdown to use it as the View for the *Item* field group
4. Use +*STAGE* to add a new stage named *Review*
   a. Use +*STEP* to add a Collection Information step under the *Review* stage named *Review Item Details*
   b. From the step parameters panel (right) click *Configure the View*
      1. In the View Configuration add the *Item* field as a field group
      2. Select *ItemDetailRO* from the View dropdown to use it as the View for the *Item* field group
   c. Use **+STEP** > **...More** > **Processes** and select *Persist object*
   d. From the step parameters panel (right) configure the *Persist object* component
      1. For *Type* use *Entity*
      2. For *Property* use "*.Item*" (double quotes are significant)
5. Change the case type rule label for *PGPImp-DemoPGP-Work-Entity-Item-Update* from *Update* to *Update item*
6. Save the case
7. Edit the *pyDefault* data transform rule for the *Update* work type to set the initial values on the *.Item* page from lookup data page
   a. Edit the *pyDefault* data transform rule for the *Update* work type to set the initial values on the *.Item* page from lookup data page
   b. Add a *Set* action to the transform definition
      1. Use *.Item* as the *Target*
      2. Use *D_Item[pyID:Param.EntityID]* as the *Source*
   c. Save the data transform

Create View case type

In PGP the *View* case type for Entities shows a comprehensive snapshot of an entity instance's data.

1. Create a new Case Type named View
    a. Expand the Advanced section and specify the ancestry
        1. Use *PGPImp-DemoPGP-Work-Entity-Item* as the directed ancestor
        2. Use *PGPImp-DemoPGP-Work-Entity-Item* as the patterned ancestor
2. Create a Workflow for the case type
3. In the Stage Name field for the Create stage use the smart-prompt to select PegaPS-Work-Entity.View from the list of available stage processes.
4. In the Stage Name field for the Create stage use the smart-prompt to select PegaPS-Work-Entity.View from the list of available stage processes.
5. Save the case
6. Override/SaveAs the PegaPS.Details section as PGPImp-DemoPGP-Work-Entity-Item-View.Details
    a. Include the section PGPImp-DemoPGP-Data-Entity-Item.Details using the .Item property as the page context.
7. Save the section
8. Edit the pyDefault data transform rule for the View work type to set the initial values on the .Item page from lookup data page
    a. Switch to the Parameters tab and add a parameter named EntityID of type String
    b. Add a Set action to the transform definition
        1. Use *.Item* as the *Target*
        2. Use *D_Item[pyID:Param.EntityID]* as the *Source*
9. Save the data transform

Create Search case type

In PGP the *Search* case type collects filter criteria from the user and retrieves a list of matching entities which may then be selected for further processing.

1. Create a new Case Type named Search
    a. Expand the Advanced section and specify the ancestry
        1. Use *PGPImp-DemoPGP-Work-Entity-Item* as the directed ancestor
        2. ii. Use *PGPImp-DemoPGP-Work-Entity-Item* as the patterned ancestor

2. Create a Workflow for the new case type
3. In the Stage Name field for the Create stage use the smart-prompt to select the PegaPS-Work.Search stage from the list of available stages
4. Override/Save As the PegaPS-Work.Search section as PGPImp-DemoPGP-Work-Entity-Item-Search.Search
5. Edit the PGPImp-DemoPGP-Work-Entity-Item-Search.Search section
6. Use**Structural** > **Embedded Section** to include the section *PegaPS-Data.Search* in the dynamic layout
   a. For *Page context* choose *Use clipboard page*
   b. For *Class* enter *PGPImp-DemoPGP-Data-Entity-Item*
   c. For *Clipboard page* select *.Item* from the list
   d. For *Section* choose *By name* and select *Search* from the list
   e. For *PARAMETER ShowSearchType* set *Value* to nothing
   f. Click Submit
7. Save the section
8. Override/SaveAs the *PegaPS-Data.SearchCriteria* section as *PGPImp-DemoPGP-Data-Entity-Item.SearchCriteria*
   a. Add the key properties for *PGPImp-DemoPGP-Data-Entity-Item* to this section
   b. Save the section
9. Override/SaveAs the *PegaPS-Data.SearchResults* section as *PGPImp-DemoPGP-Data-Entity-Item.SearchResults*
10. Edit the *PGPImp-DemoPGP-Data-Entity-Item.SearchResults* section
11. Use *Structural -> Table* to add a table layout to the section and Configure the table
   a. For *Source* choose *Data page*
   b. For *Data page* select *D_ItemList* from the list
   c. For *Parameters* check *Pass the parameter page*
   d. Submit
12. Save the section

Enabling for App Studio

- Use views and design templates to construct the user interface

- Manage the new Entity's rules in Relevant Records so that appropriate choices will appear in the App Studio smart prompts.
- For appropriate case types set the *Show in 'New' menu* checkbox under Settings -> General to enable the case type to appear on +*Create* nav

Rule inventory

The following is a list of rules created in this exercise.

Applies -to	Rule Name	Rule Type	Description	Comment
	PGPImp-DemoPGP-Data-Entity	Class	Abstract	
	PGPImp-DemoPGP-Data-Entity-Item	Class	Concrete	Key EntityID
	PGPImp-DemoPGP-Data-Entity-Item	Database Table	Persistence	
PGPImp-DemoPGP-Data-Entity-Item	ItemName	Property	Text	
PGPImp-DemoPGP-Data-Entity-Item	ItemType	Property	Text	
PGPImp-DemoPGP-	ItemDetail	Section	View	

Applies -to	Rule Name	Rule Type	Description	Comment
Data-Entity-Item				
PGPImp-DemoPGP-Data-Entity-Item	ItemDetailRO	Section	View	
	D_Item	Data Page	Page	Source=Lookup
	D_ItemList	Data Page	Page List	Source=Report Definition
PGPImp-DemoPGP-Data-Entity-Item	ItemList	Report Definition		All Item Properties
PGPImp-DemoPGP-Work	.Item *(PGPImp-DemoPGP-Data-Entity-Item)*	Page		
PGPImp-DemoPGP-Work	.ItemList *(PGPImp-DemoPGP-Data-Entity-Item)*	Page		
	PGPImp-DemoPGP-Work-Entity	Class	Abstract	
	PGPImp-DemoPGP-	Class	Abstract	

Applies -to	Rule Name	Rule Type	Description	Comment
	Work-Entity-Item			
	Add	Case Type		
	PGPImp-DemoPGP-Work-Entity-Item-Add	Class	Concrete	Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	pyDefault	Case Type		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	CreateForm_Default	Flow		Case Type
	D_Add	Data Page		Case Type
	D_AddList	Data Page		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	pyDefault	Data Transform		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	pySetFieldDefaults	Data Transform		Case Type
PGPImp-DemoPGP-	ItemInformation_Flow	Flow		Case Type

Applies -to	Rule Name	Rule Type	Description	Comment
Work-Entity-Item-Add				
PGPImp-DemoPGP-Work-Entity-Item-Add	Create	Flow Action		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	Create	Section		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	ItemDetails	Flow Action		Case Type
PGPImp-DemoPGP-Work-Entity-Item-Add	ItemDetails	Section		Case Type

Features implementation

Implement and extend the features of Pega Government Platform (PGP) to meet your business needs.

- **Dashboard**
- **Search program landing page**
- **Review checklist**
- **Consent agreement**

- Document intake
- Verify document
- Nearby locations
- Evaluate
- Activity plan
- Assessments
- Multiple entity intake
- Case report
- Programs
- Operator Case Involvement (Touch) reporting
- Time Management

Dashboard

The dashboard in the portals provides users with a diverse set of reports based on application and their access group.

- Reports on investigation
- Reports on event
- Reports on application request
- Nearby cases chart
- Adding a new report or chart to dashboard

Reports on investigation

Users logging with ICMCosmosSupervisor,ICMCosmosAgent access have reports related to investigations in dashboard.

The following are the reports:

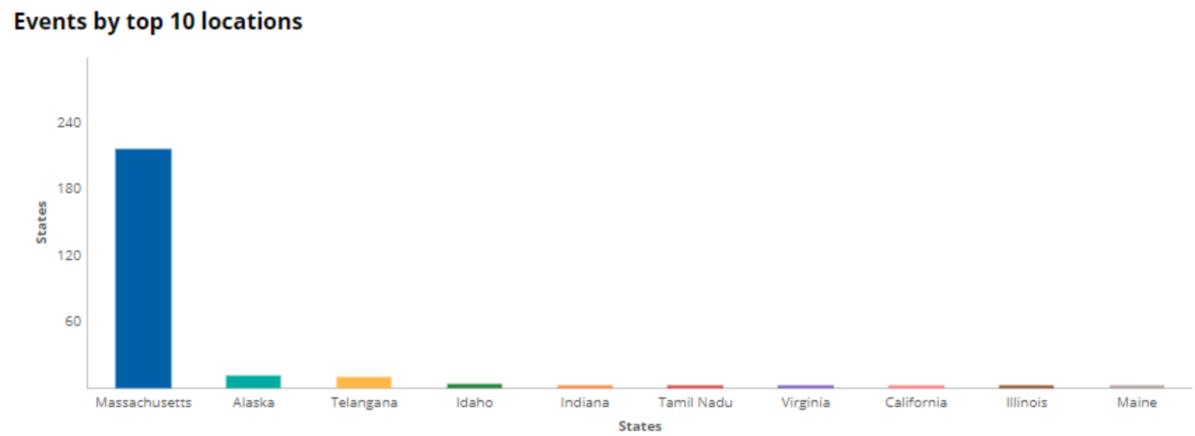
- Investigation by status: The pie chart represents the number of investigations for a status.
- To make changes, open "InvestigationByStatus"*(CL:PegaPS-Work-ICM-Investigation)* section and "InvestigationByStatus" *(CL: PegaPS-Work-ICM-Investigation)* report definition.

Reports on event

Users with access other than "ICMCosmosSupervisor," "ICMCosmosAgent" have reports related to events in dashboard.

The following are the reports:

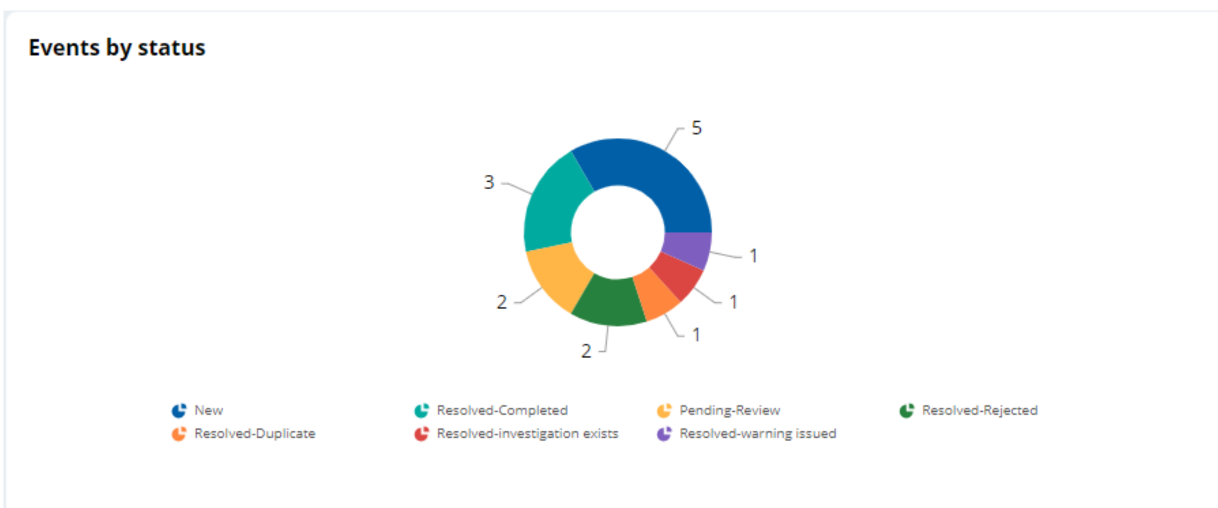
- Events by top 100 locations: The following is a column chart representing top 10 states which have most events with all statuses except "resolved-Cancelled". Events with no address information are excluded.



Events Report

To make changes open “**EventsByLocation**”(*CL: PegaPS-Work-Event-Initiate*) section and “**EventsByLocation**” (*CL: PegaPS-Work-Event-Initiate*) report definition.

- Event by Status: The following is a pie chart representing event cases against their status.



Events report by status

To make changes, open "**EventsByStatus**"(*CL PegaPS-Work-Event-Initiate*) section and "**EventsByStatus**" (*CL: PegaPS-Work-Event-Initiate*) report definition.

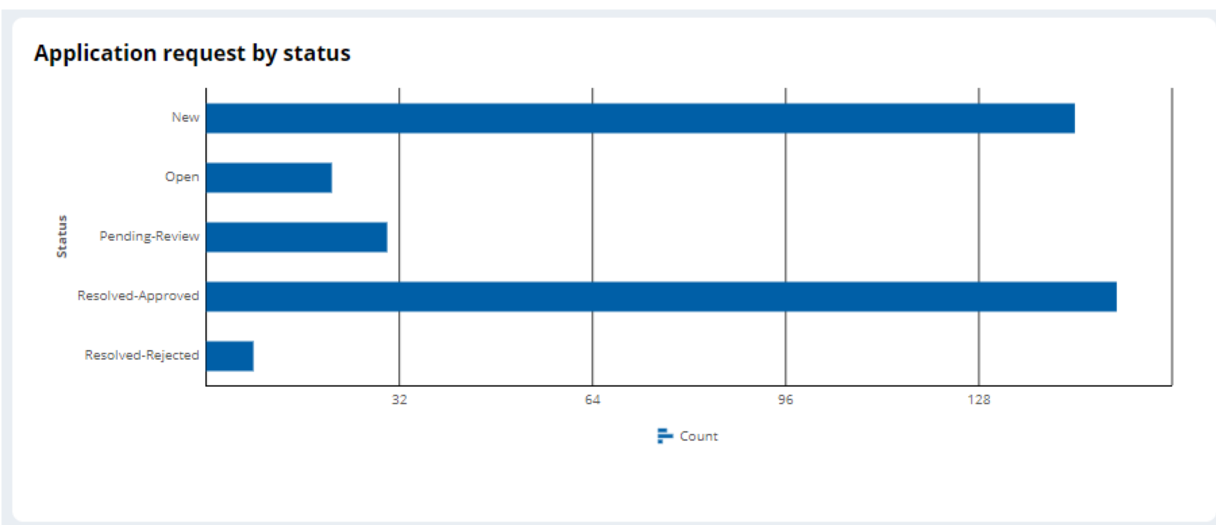
> **Note:** The above report excludes **resolved cancelled** status.

Reports on application request

Users logging into **PGPCosmos** and **ICMComos** applications have reports on application requests in dashboard.

The following are the reports:

- Application Request by Status: The following Bar graph represents the count of applications based on their status.

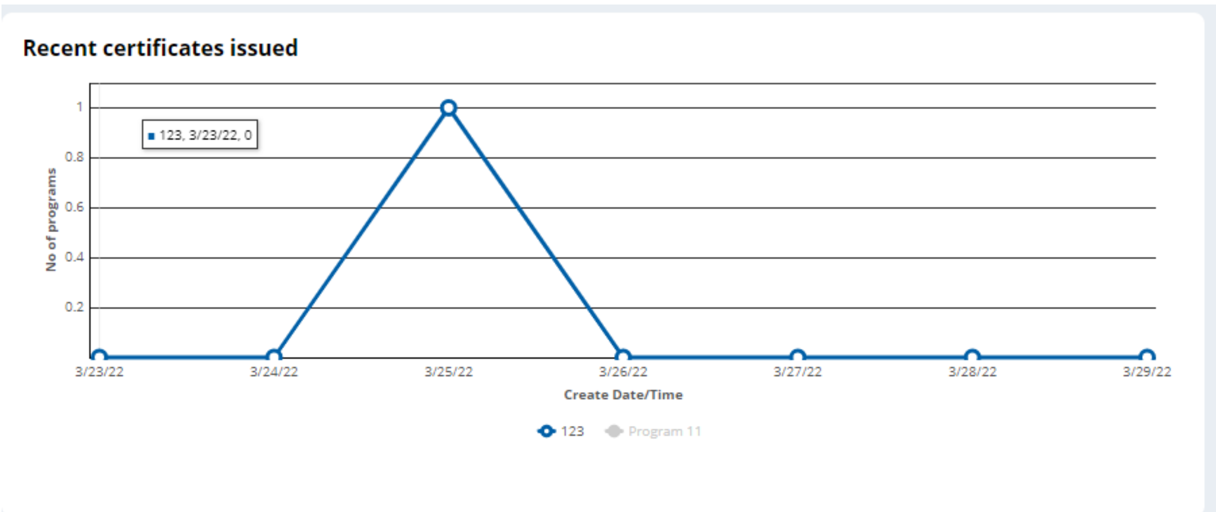


Application request by status

To make changes open "**AppRequestByStatus**"(*CL: PegaPS-Work-ApplicationRequest*) section and "**AppRequestByStatus**" (*CL: PegaPS-Work-ApplicationRequest*) report definition.

> **Note:** The above report excludes resolved cancelled status.

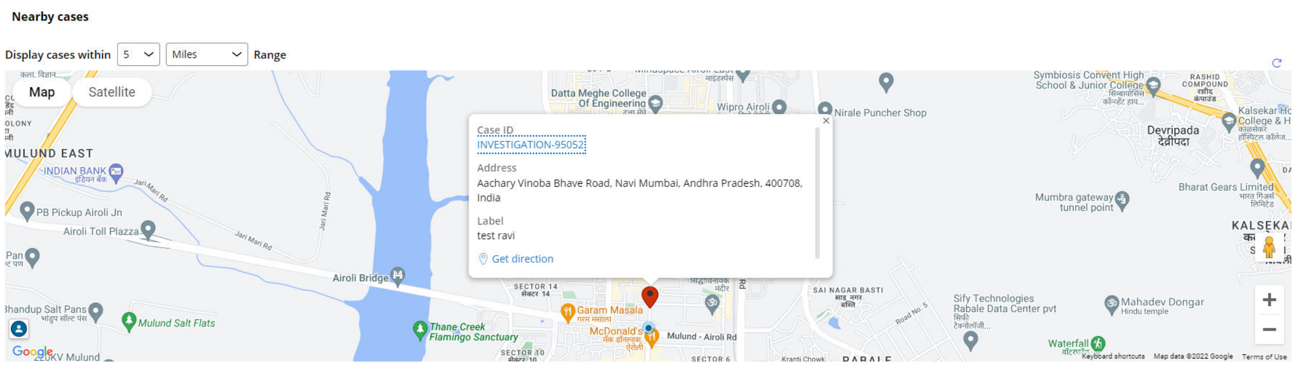
- Recent certificates issued: The following line graphs show different certificates approved in the last seven days.



Certificates issued recently

Nearby cases chart

This chart provides the information on cases within the given range of distance.



Nearby cases chart

Adding a new report or chart to dashboard

Easily add new reports or charts to your dashboard or edit chart labels with our simple step-by-step guide.

To add a new report or chart to dashboard, follow these steps:

1. Open **pyDefautUserDashboard** and add a step.
2. Set action as **Update Page**.
3. In Target, give *.pySlots(number).pyWidgets(number)* and set the following values as shown in example

12	When	AccessGroup.pyAccessGroup==D_ICMAppContext.Busi		
12.1	Update Page	.pySlots(2).pyWidgets(1)		
12.1.1	Set	.pySectionName	equal to	"InvestigationByCategory"
12.1.2	Set	.pyClassName	equal to	D_ICMAppContext.ClassNameValueGroup(W
12.1.3	Set	.pyWidgetOptionsSectionName	equal to	""
12.1.4	Set	.pyLabel	equal to	"Investigation by category"
12.1.5	Set	.pyDescription	equal to	"Investigation by category"
12.1.6	Set	.pySelected	equal to	false
12.1.7	Set	.pyWidgetIsMasked	equal to	false
12.1.8	Update Page	.pyWidget		
12.1.8.1	Set	Param.ClassName	equal to	D_ICMAppContext.ClassNameValueGroup(W
12.1.8.2	Apply Data Transform	SetObjClass		

Add report/chart

Edit labels of a chart

To edit lables of a chart, follow these steps:

1. Open the section with live UI and open the chart cell properties.
2. To change the Title go to **General** tab, under chart section click **Edit Title**.
3. To change axis labels, go to **Axis** tab and change **Axis Label**.

Search program landing page

The landing page can be accessed from the left navigation pane. Programs/Licenses can be searched using details such as category, subcategory, name of program/License and entity type, entity name. The ID and Entity Name columns are provided as links to view details if required.

- **Adding a search field**
- **Adding field in search results**
- **Adding field to search criteria**

Adding a search field

To add a search field, complete the following steps:

1. Open **D_SearchProgramList**data page and add a parameter under the Parameters tab.
2. In Data Sources, open all the reports included as source.
3. In each report add parameter and update the filter conditions accordingly.

Adding field in search results

To add a field in the search results, complete the following steps:

1. Open **D_SearchProgramList** data page, in **Data Sources** open all the reports included as source.

2. In query tab of each report, add field as a column to display in the results.
3. Open ""**SearchProgramTable"(CL:PegaPS)** section, Add a column to the table and include the field.

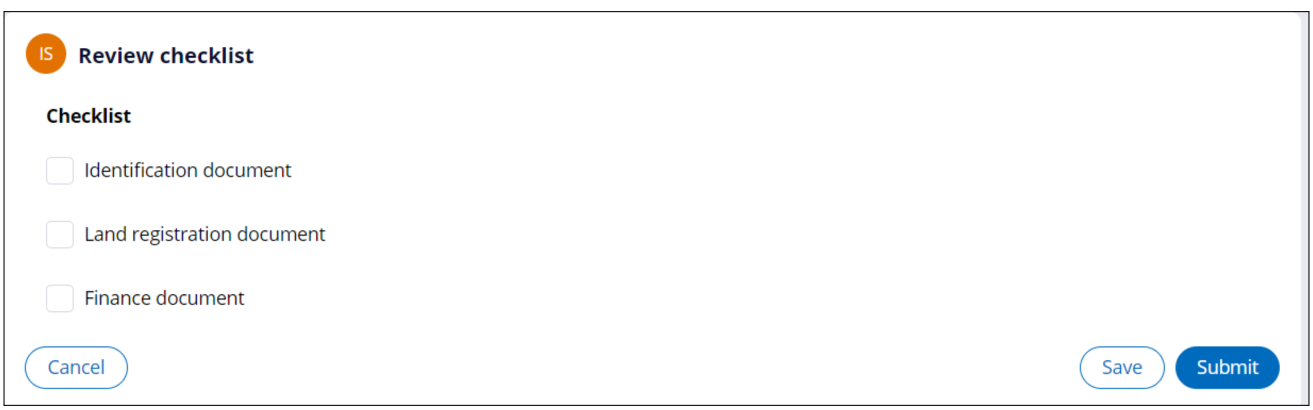
Adding field to search criteria

To modify the search criteria open **"SearchProgramTableHeader"(CL-PegaPS)** and add or deletes fields as required.

Review checklist

Review checklist is a reusable and generic component for a process through which an evaluator or manager can review the application progress based on various checklist items.

You can use review checklist in various intake applications of government business use cases, like grants application, issuance of certificates, license and permits, where a caseworker and manager need to complete different sets of checklist items.



In Pega Government Platform, document configuration can be done in two ways.

1. Review checklist configuration from App studio

2. Checklist config component configuration in runtime

Configuring review checklist from App Studio

You can add a review checklist as a component from App Studio and you can configure the list for various use cases. Using the parameters of the component, you can choose a list to display in a case.

Using review checklist

Configure a checklist type and add the component to a step in a stage.

1. Configure a Checklist type that you can select to populate a Review Checklist. A Checklist type provides the checklist item rows that the checklist contains.
2. Add the review checklist process component, to a step, in a stage of your case type.

Configuring a checklist type

Add a new checklist type with checklist items or update an existing checklist.

You can add a review checklist component in a case lifecycle as a step to introduce a process through which an evaluator or supervisor can review various to-do tasks that need to be completed as part of any application or case lifecycle.

1. In the navigation pane of App Studio, click **PGP**.
2. In the PGP explorer, click **Review checklist**.
3. Click the **New checklist** button to create a new review checklist.
4. In the **Purpose** box, enter a purpose for the checklist.
5. In the **Checklist items** section, click **Add checklist item** to add a new checklist item.
6. In the **Label** box, enter a label for the review checklist items. The corresponding code appears in the **Code** box.
7. Click **Save**.

Configuring review checklist in case designer

Configure the review checklist component in App Studio to use in a case type, as a step, in any of the stages.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click .
3. In the navigation pane of , click **Case Types**.
4. In the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name for the stage in the text box.
6. Hover over Process, and then click **STEP** > **More** > **Processes** > **Review Checklist**.
7. Click the **Select** button.
8. In the **Checklist details** section, in the **Source** list, select the name of the checklist type that the Review Checklist shows:
    - To choose a specific checklist type, select **By name**, and then, in the **Checklist type** list, click one of the items.
    - To specify a property in the work class that supplies a specific checklist type at run time, select **By property**, and then enter a property value that is a valid checklist type.
9. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.
    - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
    - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.

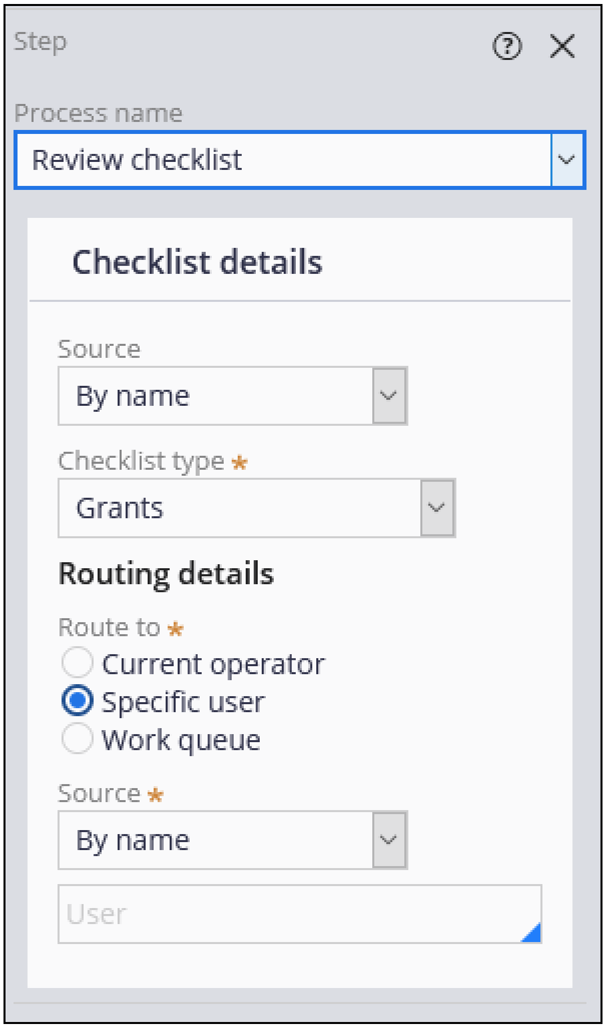


Figure: Section showing the routing details

10. Click Save.

Configuring checklist component in runtime

Checklist config is a section component that can be used in any case type to configure it in runtime. Furthermore, required validations and persist feature are provided as reusable components that can be used to save or validate multiple configurations simultaneously.

User can configure the Checklist sub-configuration as follows:

- **Select existing:** Users can choose from existing configurations.

- **Create new:** User can either create a new Checklist from scratch or modify an existing Checklist set.
- **None:** Users can choose not to configure a Checklist set for their use case.

Technical description

This component provides basic validations such as validating if checklist is empty and Duplicate check for checklist. The system will throw validation errors if the checklist is empty and if we try to create a duplicate checklist.

The following validations are provided as part of this component:

- IsChecklistEmpty
- IsChecklistDuplicate
- ValidateChecklistConfig

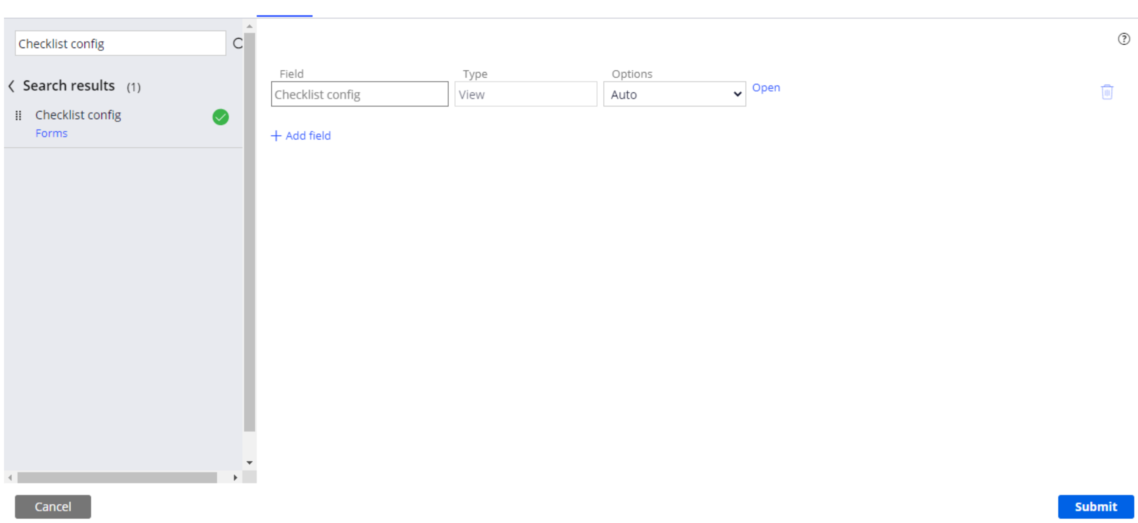
The Persist configuration flow component can be used to persist the configurations created. This component allows multiple types of configurations to be saved simultaneously.

Configuring checklist config component in case designer

This component can be used in any case type as a step in any of the stages or as a view. Make use of the Validation rules and persist configuration component provided.

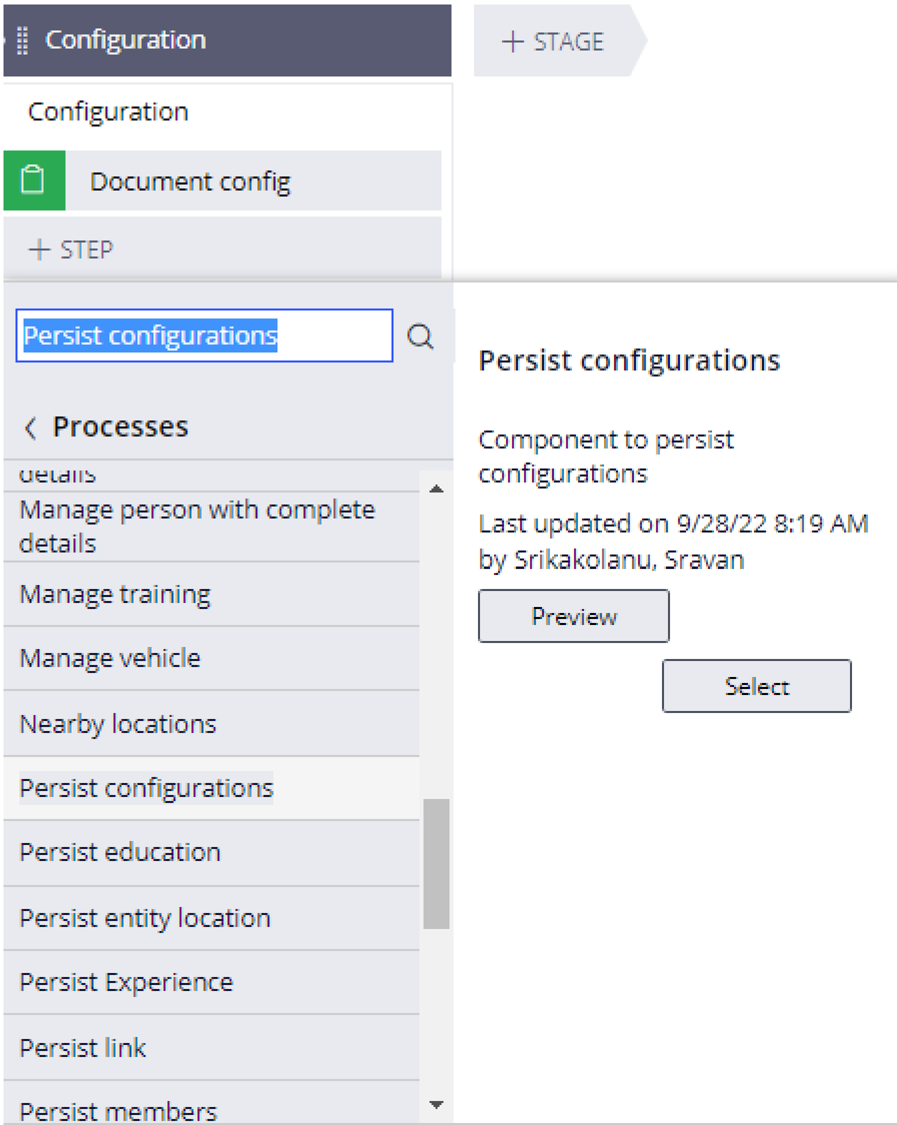
Follow these steps to configure the section component:

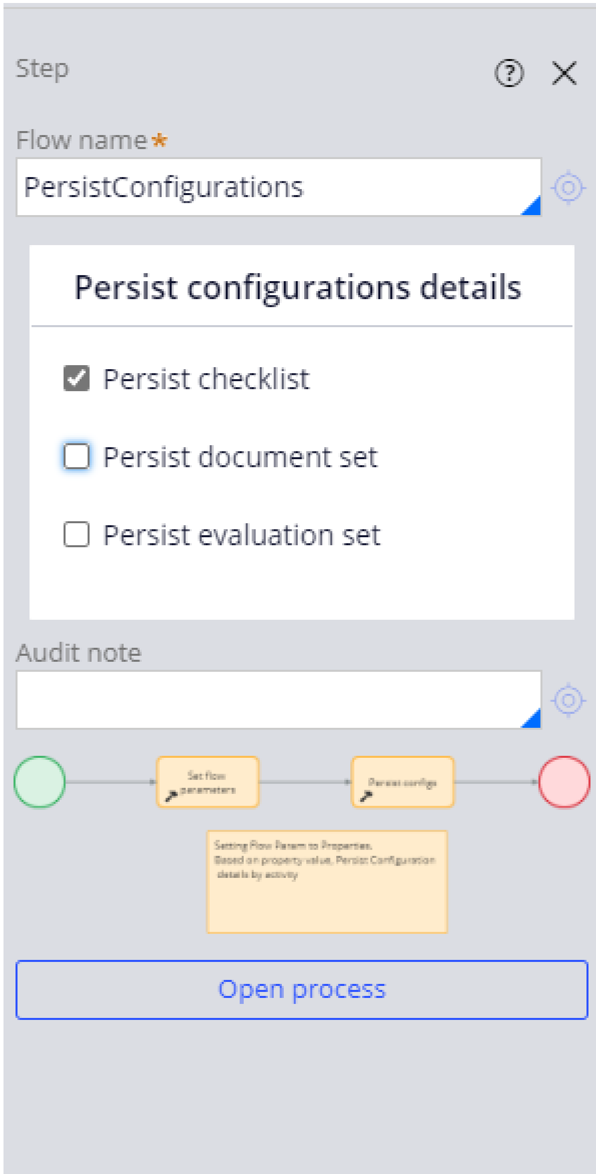
1. Invoke Checklist component as a view and add validation. Using the persist component, you can persist case data.
   a. Click Configure view, search for **Checklist config** in existing views and add it to form (as shown in the following image).



Checklist config

2. To Persist data using persist component, click **+ STEP** > **More**. Search for **Persist configurations** processes and click **Select** to add it as a step. Select **Persist Checklist set** checkbox.

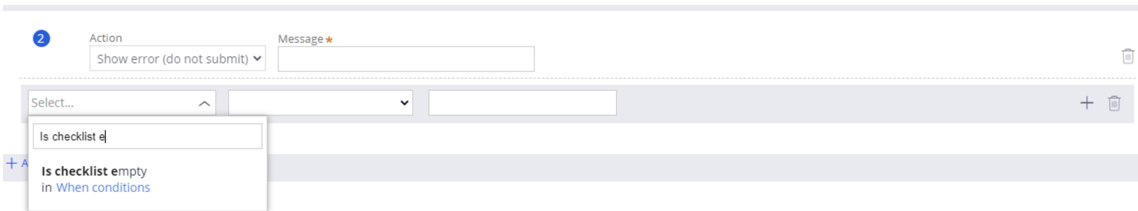

Configuration
+ STAGE
Configuration
Document config
+ STEP
Persist configurations
Processes
Manage person with complete details
Manage training
Manage vehicle
Nearby locations
Persist configurations
Persist education
Persist entity location
Persist Experience
Persist link
Persist members
Persist configurations
Component to persist configurations
Last updated on 9/28/22 8:19 AM by Srikakolanu, Sravan
Preview
Select



Persist checklist

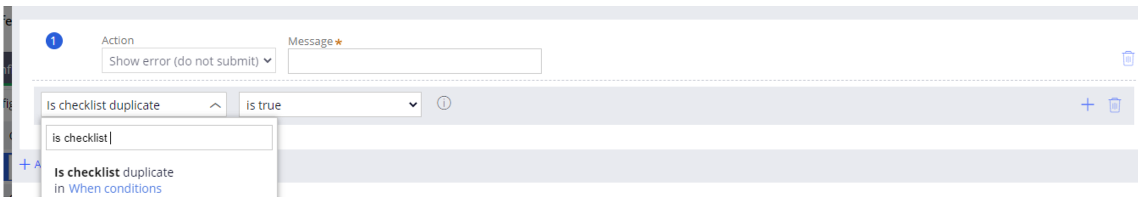
Persist configurations

3. To add Validation from App studio
    a. Navigate to **Configure view** of step and switch to **Validations** tab. Search for **IsChecklistEmpty** to validate the empty config list (select if required).



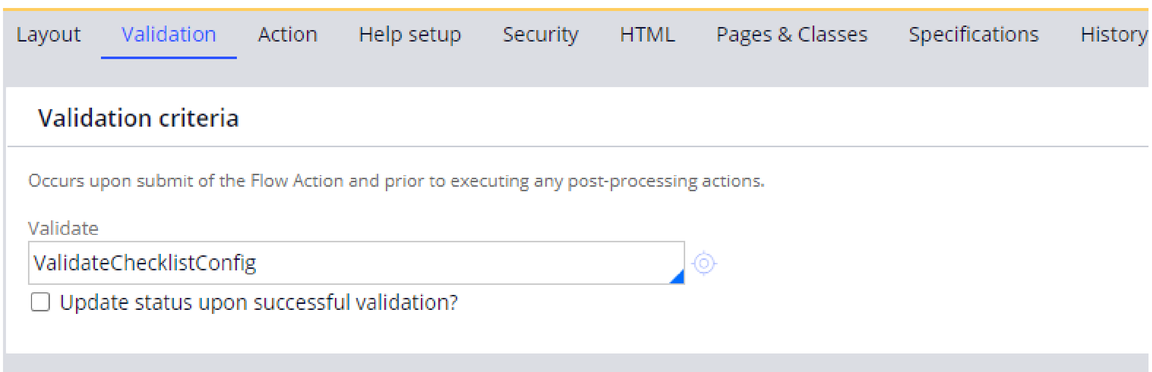
Configure view

b. For duplicate entry, search for **IsChecklistDuplicate** in **When** condition.



Duplicate entry

4. To invoke validation rule, Open Flow action from Dev Studio.
   a. For all validations Call **ValidateChecklistConfig** (under Validate tab).



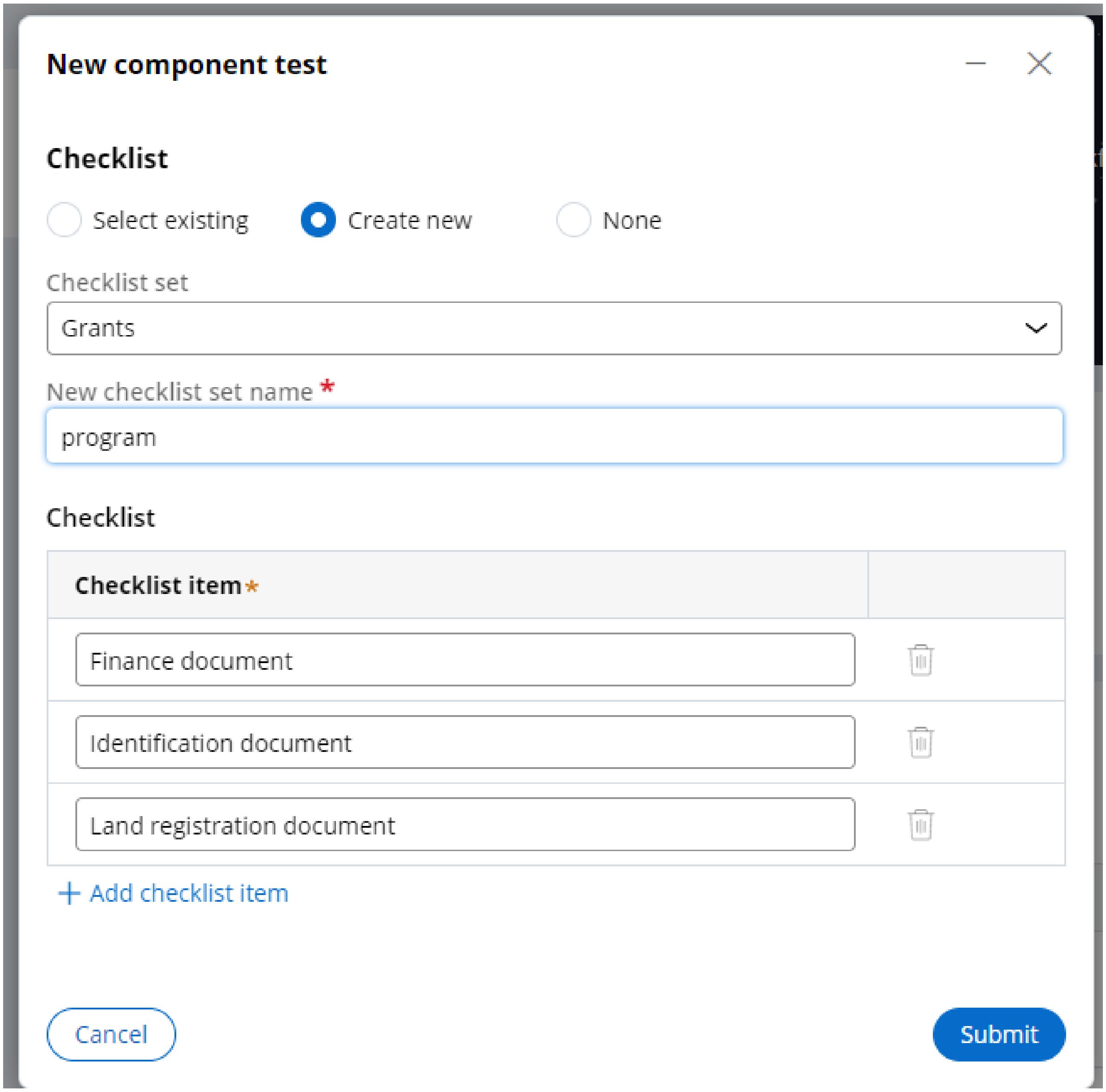
Validation criteria

Adding a new checklist purpose

Follow these steps to add a new Checklist configuration as a step or view for one of the case types.

1. Create a case and navigate to **Checklist Config** section .
2. Select **Create new** and provide a name for the new checklist set.
3. Enter the other details and click **Submit**.

   Once the case is submitted and a new checklist set is created.



New checklist set

Extending review checklist

Implement a simple data-driven review component. If your application requires more robust question and answer capabilities, use the Pega Government Platform Assessments feature.

Below are the extension data transforms to add additional parameters or to set additional configuration properties to case type. Extend them in implementation layer for any customization.

- *MapConfiguration (PegaPS-Work)*: Wrapper Data Transform with Extension. Extra Parameters can be defined and form respective configuration list based on logic.
- *ResetConfigValues (PegaPS-Work)*: Wrapper Data Transform with Extension. Extra Parameters can be added and Reset config values based on parameters
- *SetConfigsToCaseProperties_Ext (PegaPS-Work)*: Extension Data Transform to set config properties to Case type

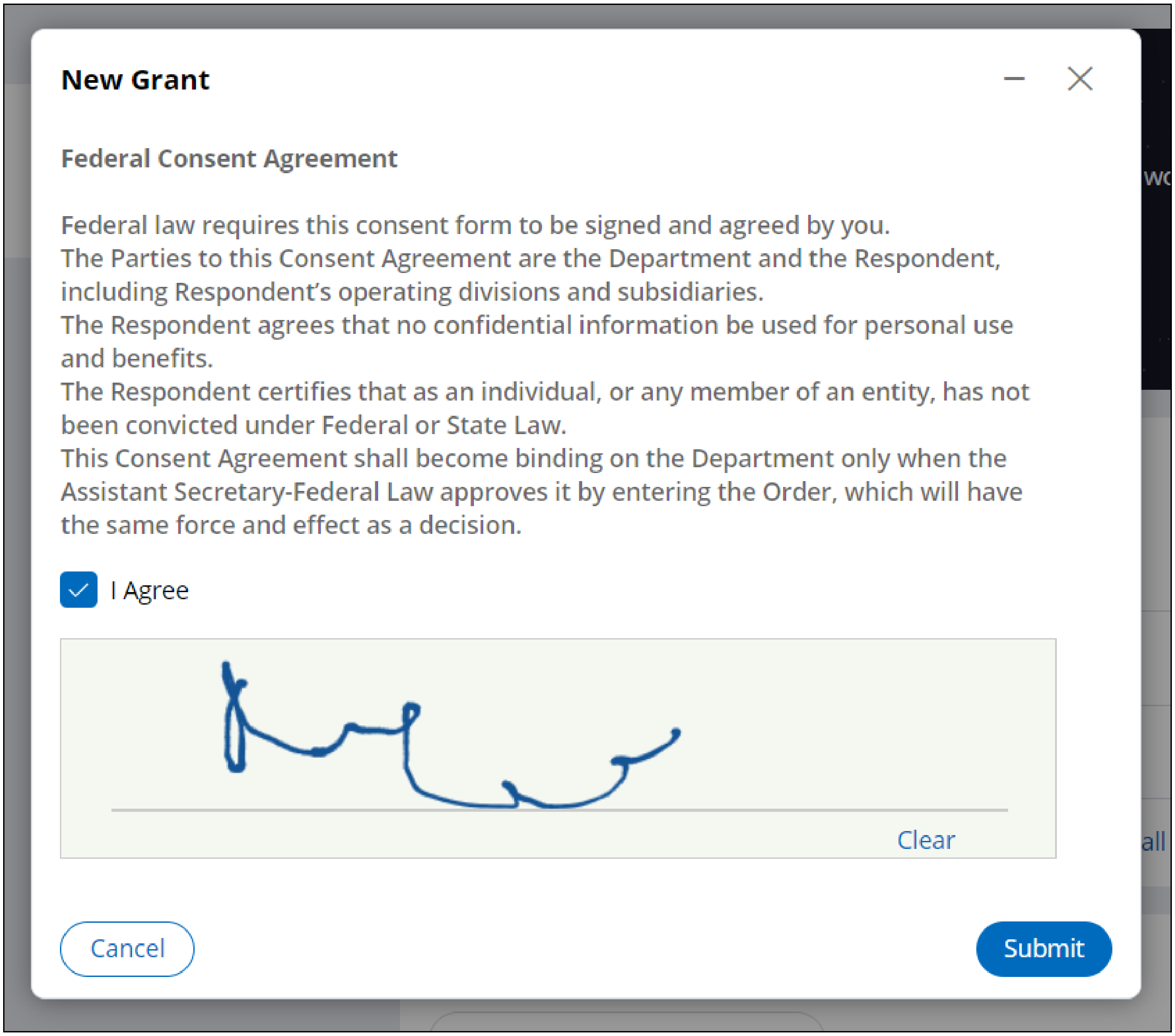
> **Note:** The review checklist feature is provided as a simple reusable self-contained table-driven control. Use the review checklist feature as-is without rule or UI customization. Overriding the rules that compose review checklist and *CheckListMap* is not recommended and may cause unexpected behavior during Pega Government Platform version upgrades.

Consent agreement

The Consent Agreement component displays an actionable consent agreement screen. The consent agreement screen contains the text stating the agreement clauses, a check box to agree, and a field to enter signature.

Government agencies can have various agreements, and terms and conditions that the constituents or the end users need to agree for various business use cases.

For example, for any contract award or for any grant application from the government, there must be an agreement between both the parties which is signed and agreed upon. The text and content must be different for different applications.



In Pega Government Platform (PGP), Consent agreement configuration can be done in two ways.

- Consent agreement configuration from App Studio
- Consent agreement configuration in runtime case

Configuring consent agreement from App studio

Use the Consent Agreement process component in a case type as a step in any of the stages. Consent Agreement is a built-in dynamic PGP component that allows e-signatures and templates.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Consent agreement**.
7. Click the **Select** button.
8. In the **Consent agreement details** section, in the **Source** list, select a source.
   a. Select **By name**, and in the **Consent agreement template** list, select an agreement type.
   b. Alternatively, select **By property** to specify a property on the work class that supplies the specific agreement type at run-time.
9. Select the **Is e-signature required?** check box to include an e-signature.
10. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.
    - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
    - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.
11. Click **Save**.

Result:

Based on the business use case need, you can select the appropriate text template from the available templates and can include an e-signature.

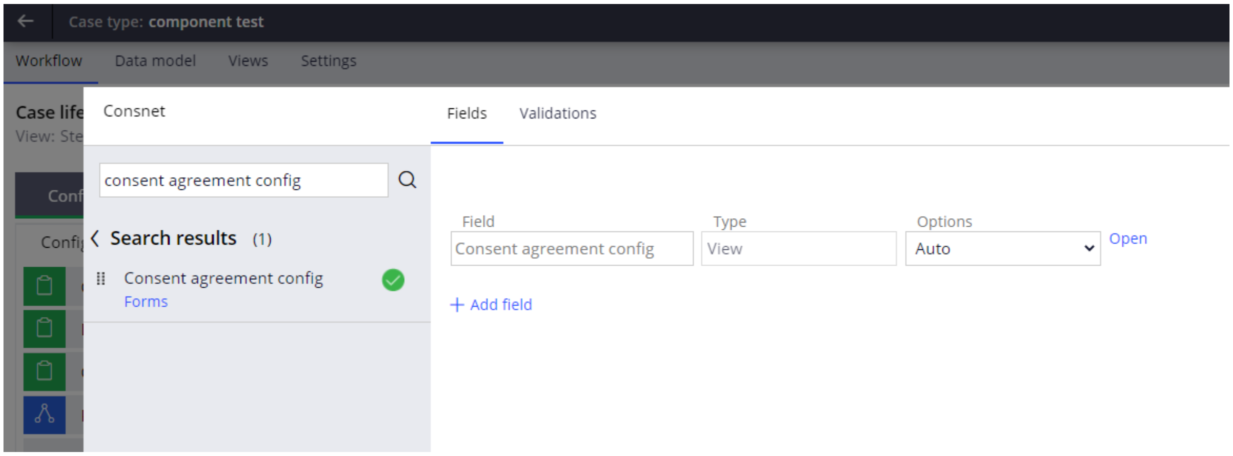
Configuring consent agreement in runtime case

Consent agreement config is a section component that can be used in any case type screen to configure it at runtime. You can select the consent agreement whichever is required to be configured for your case in run time case. Users will also have an option to enable capturing digital signatures.

Configuring consent agreement config component in case designer

This section component can be used in any case type as a step in any of the stages or as a view.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click **Switch Studio** menu, and then click App studio.
3. In the navigation pane of App studio, click **Case types**.
4. From the **Case types** column, click a case type or click **New** to create a new case type.
5. Add the step in the stage and click **configure view**.
6. In the left pane, search for **Consent agreement config** and click + icon.



Configuring consent agreement

Extensions

To set additional configuration properties to case type, use the following extension data transform. Extend it in implementation layer for any customization.

SetConfigsToCaseProperties_Ext (PegaPS-Work) data transform : Extension data transform to set config properties to case type.

Extending consent agreement

Extend the Consent Agreement feature to add additional templates or edit the existing template text.

Note: To create new consent agreement templates, you must switch to Dev Studio.

1. In the navigation panel of Dev Studio, click **Records.**
2. Click **Data Model** > **Property.**
3. Click the filter for **Property Name**, and then search for `ConsentAgreementTemplate`.
4. Click the property.

5. In the **Display and validation** section, in the **Prompt values** area, create a new paragraph rule by clicking the **Add a row** icon.
6. In the **Standard value** box, enter a value, for example, `CentralAgreementTemplate`.
7. In the **Prompt value** box, enter or select the desired value.
8. Click **Save**.
9. In the navigation panel of Dev Studio, click **Data types**.
10. Click **Option map**.
11. On the **Records** tab, click **Add record**.
12. Enter the appropriate text for the **ID**, **Code**, **Display value**, **Display order**, and **Field name / Group** fields.

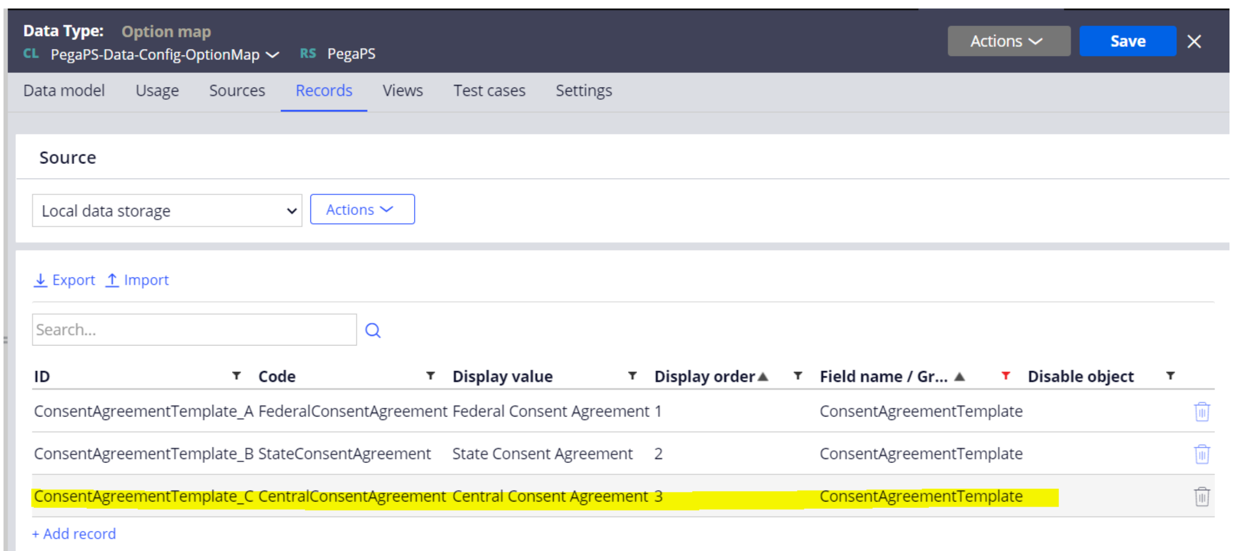


Figure: Adding a new consent agreement template

13. Click **Save**.

Result:

After you refresh the *D_PGPOptionMapList* and *D_OptionMapList* data pages, the new consent agreement template is displayed in the **Consent agreement template** list.

Document intake

Document intake enables you to attach the required documents for a particular category.

You can do the following from App Studio.

- Configure a document.
- Create a new document category or use an existing category.
- Add specific documents to a category.
- Configure other details such as, mandatory document, optional document, and so on.

For various applications, depending on the norms and policies, different set of documents need to be uploaded as a part of any case. To achieve different set of requirements for different applications, you can use this component and configure it accordingly.

In PGP, document configuration can be done in two ways.

- Document configuration from App studio
- Document configuration in runtime case

Configuring document from App studio

Configuring document intake in case designer

Use the Document intake process component in a case type as a step in any of the stages.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.

4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Document intake.**
7. Click the **Select** button.
8. In the **Document details** section, in the **Source** list, select a source.
   a. Select **By name**, and in the **Purpose** list, select a document from the list of required documents.
   b. Alternatively, select **By property** to specify a property on the work class that supplies a specific document at run-time.
9. In the **Routing details** area, select an operator:
   - To route the assignment to the current operator, click **Current operator**.
   - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
   - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.
10. Click **Save**.

Viewing the added documents in read-only view

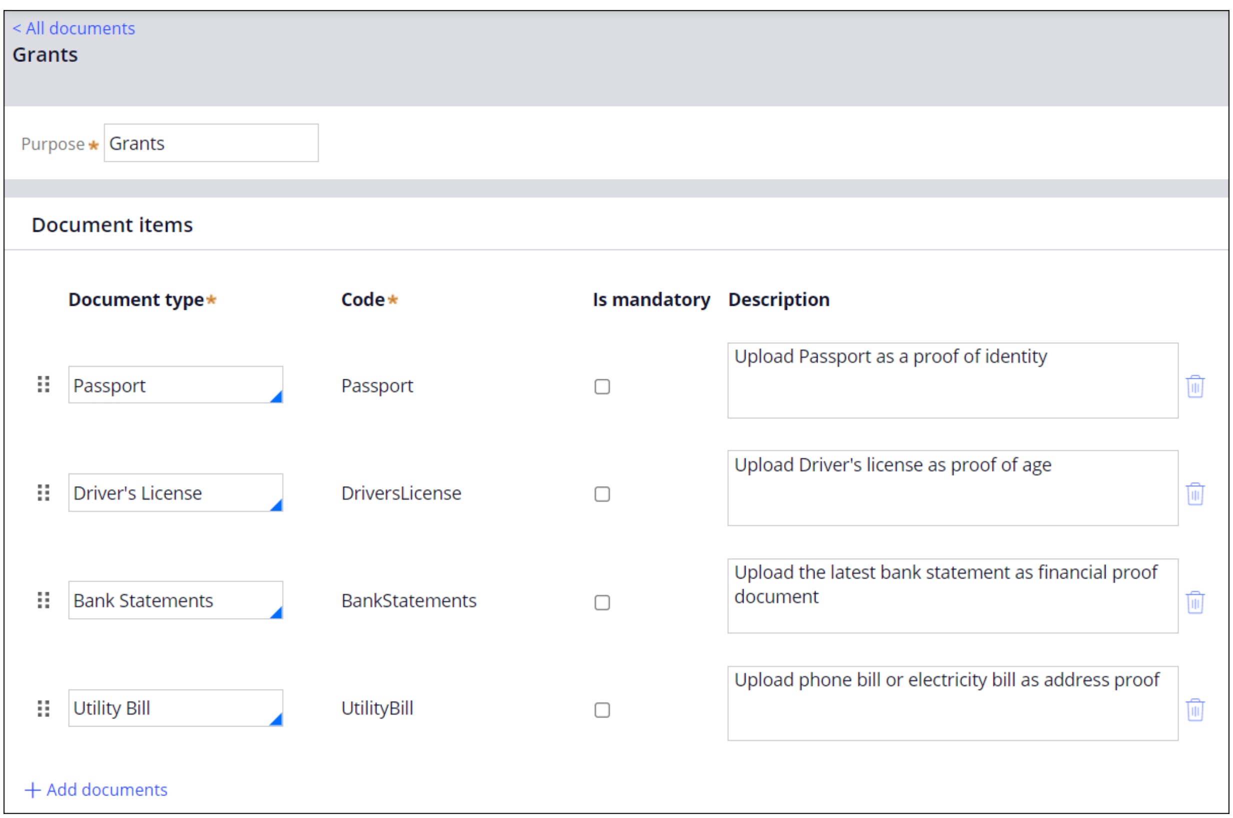
11. Click the **Views** tab, and then click **Create new view**.
    a. In the **Search** box, enter `Intaken documents`, and then click the **Add to view** icon.
    b. In the **Options** list, select **Read-only**.
12. Click **Submit**.

Editing or adding a new document purpose

Add a new document purpose with a list of documents.

For different applications, you may have to upload unique sets of documents. Using App Studio, you can edit an existing purpose and a list of documents, or add a new purpose and the corresponding list of documents.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **PGP**, and then click **Document intake**.
4. Click a document category to edit it, or click the **New document** button to create a new document category.
5. In the **Purpose** box, enter the purpose of the document category.
6. In the **Document items** section, click **Add documents** to add them to the category.
7. Configure the document items as desired and click **Save**.



Configuring document in runtime case

Document config is a section component which can be used in any case type to configure it in runtime. Furthermore, required validations and persist feature are provided as reusable components that can be used to save or validate multiple configurations simultaneously.

User can configure the document sub-configuration in any run time case as follows:

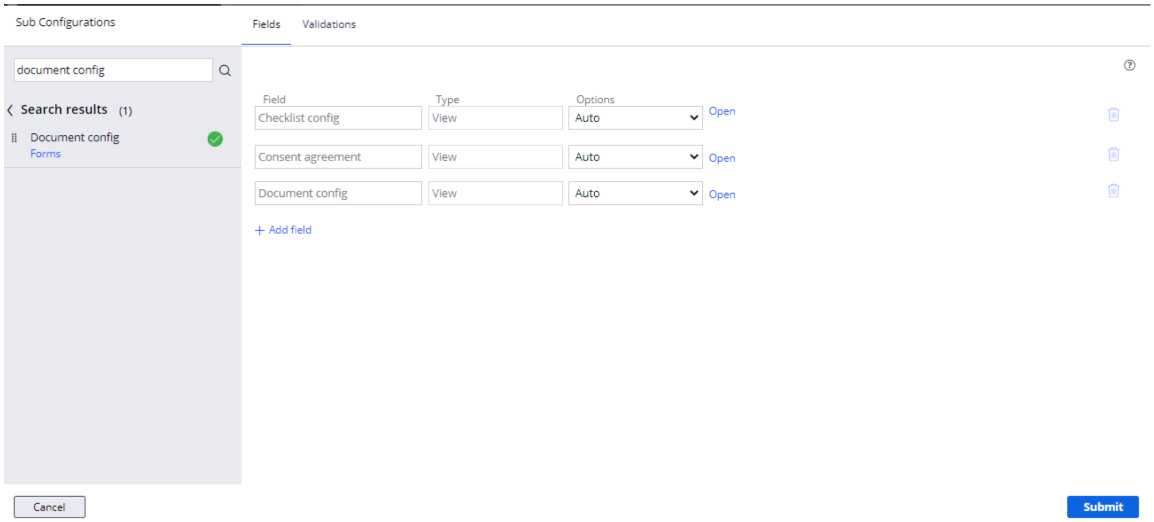
- **Select existing**: Users can choose from existing document configurations.
- **Create new**: User can either create a new document from scratch or modify an existing document set.
- **None**: Users can choose not to configure a document set for their use case.

Configuring document config component in case designer

This component can be used in any case type as a step in any of the stages or as a view. Make use of validation rules and persist configuration component provided.

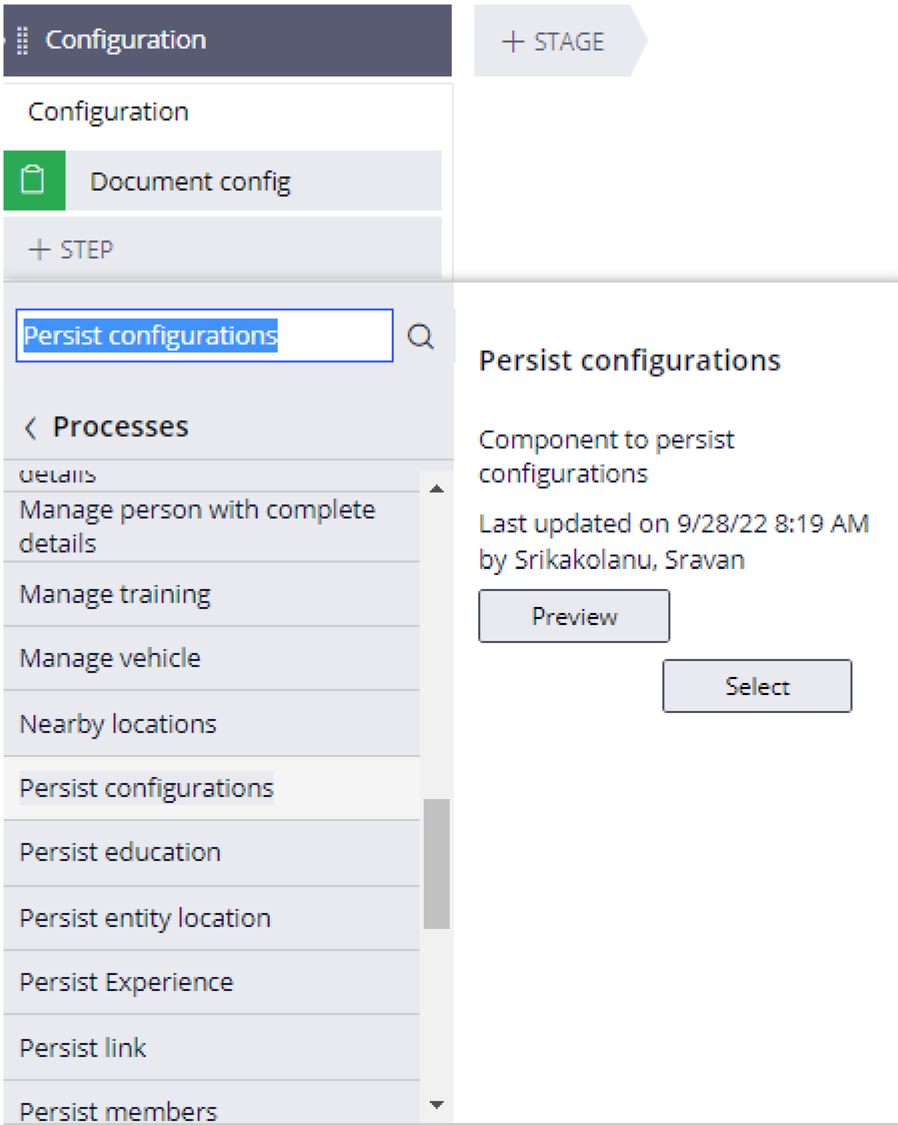
Follow below steps to configure the section component:

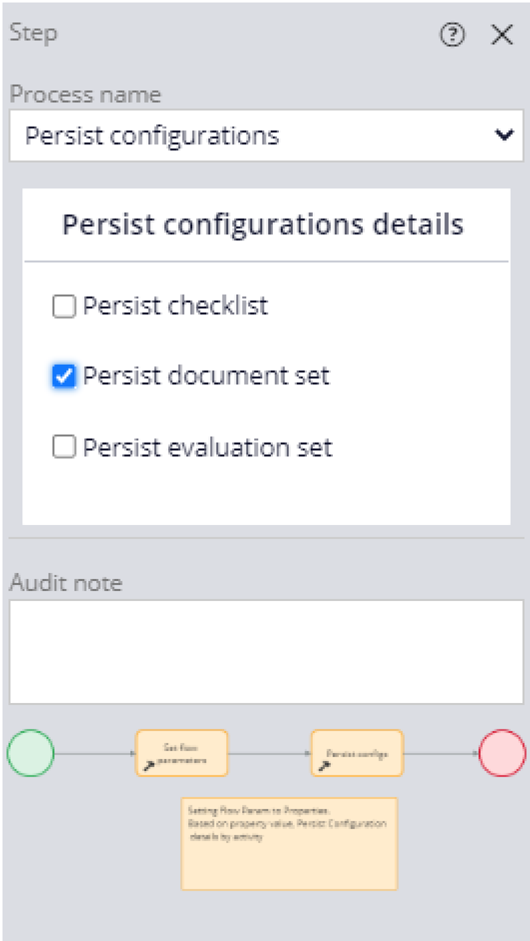
1. Invoke Document component as a view and add validation. Using the persist component, you can persist case data.
    a. Click Configure view, search for **Document config** in existing views and add it to form.



Document configurations

2. To Persist Data using persist component, click **+ Step** > **More**. Search for **Persist configurations** processes and click **Select** to add it as step. Select **Persist document set** checkbox.


Configuration
+ STAGE
Configuration
Document config
+ STEP
Persist configurations
Processes
Manage person with complete details
Manage training
Manage vehicle
Nearby locations
Persist configurations
Persist education
Persist entity location
Persist Experience
Persist link
Persist members
Persist configurations
Component to persist configurations
Last updated on 9/28/22 8:19 AM by Srikakolanu, Sravan
Preview
Select

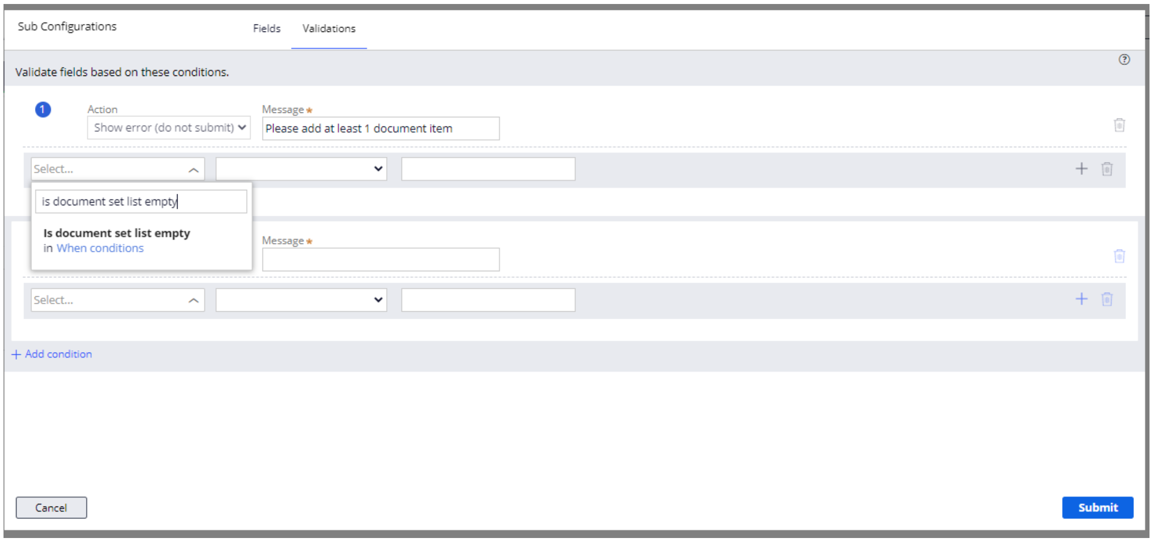


Persist document set checkbox

Persist configurations

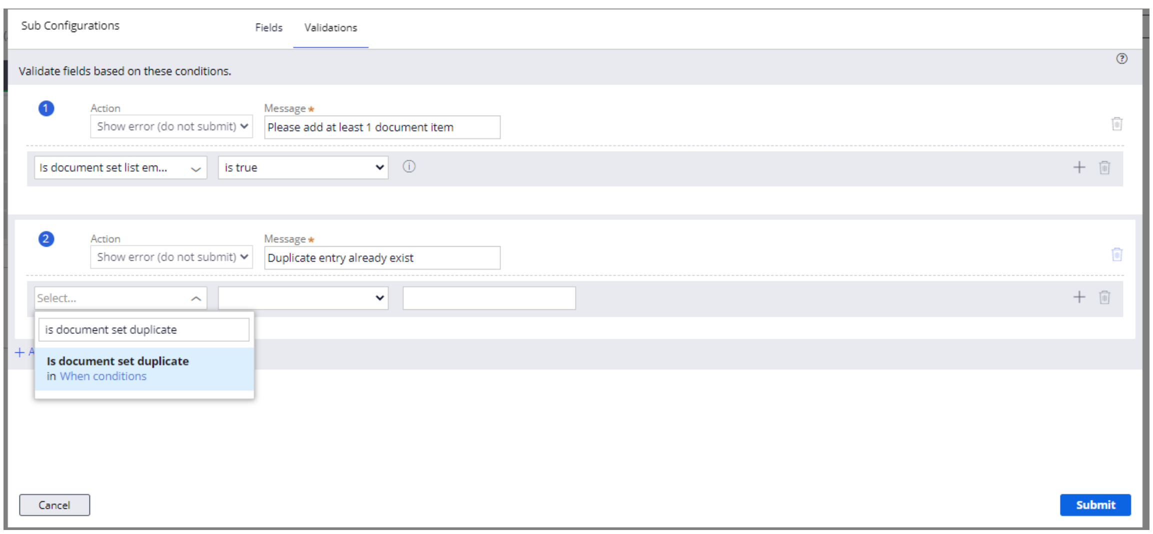
3. To add validation from App studio:

    a. Navigate to configure view of step, switch to Validations tab and search for *IsDocumentSetListEmpty* to validate the empty config list . (Select if needed)



Validating from App studio

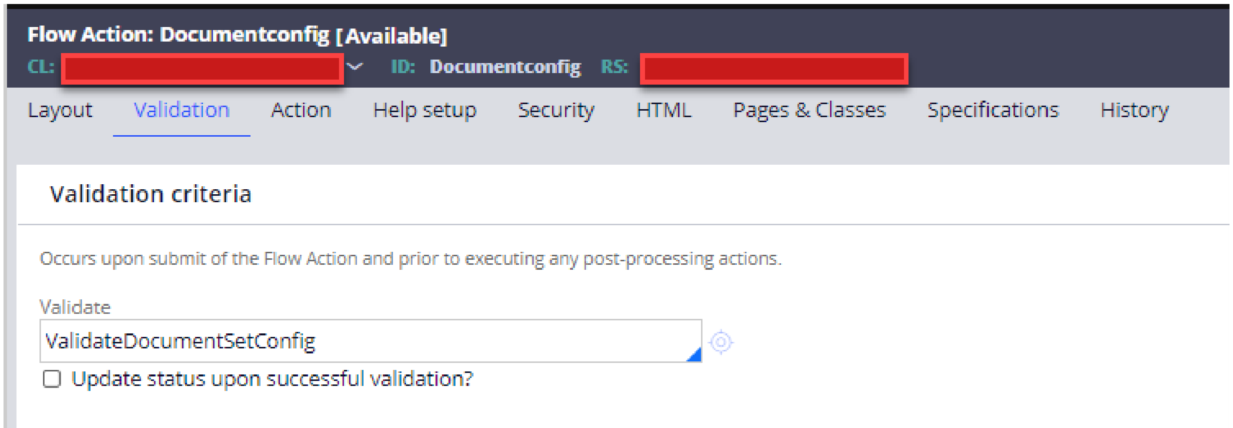
b. Search for **IsDocumentSetDuplicate** when condition as shown for duplicate entry.



Validating duplicate entry

4. To invoke validation rule, open Flow action from Dev studio.

   For all validations call *ValidateDocumentSetConfig* (under validate tab).

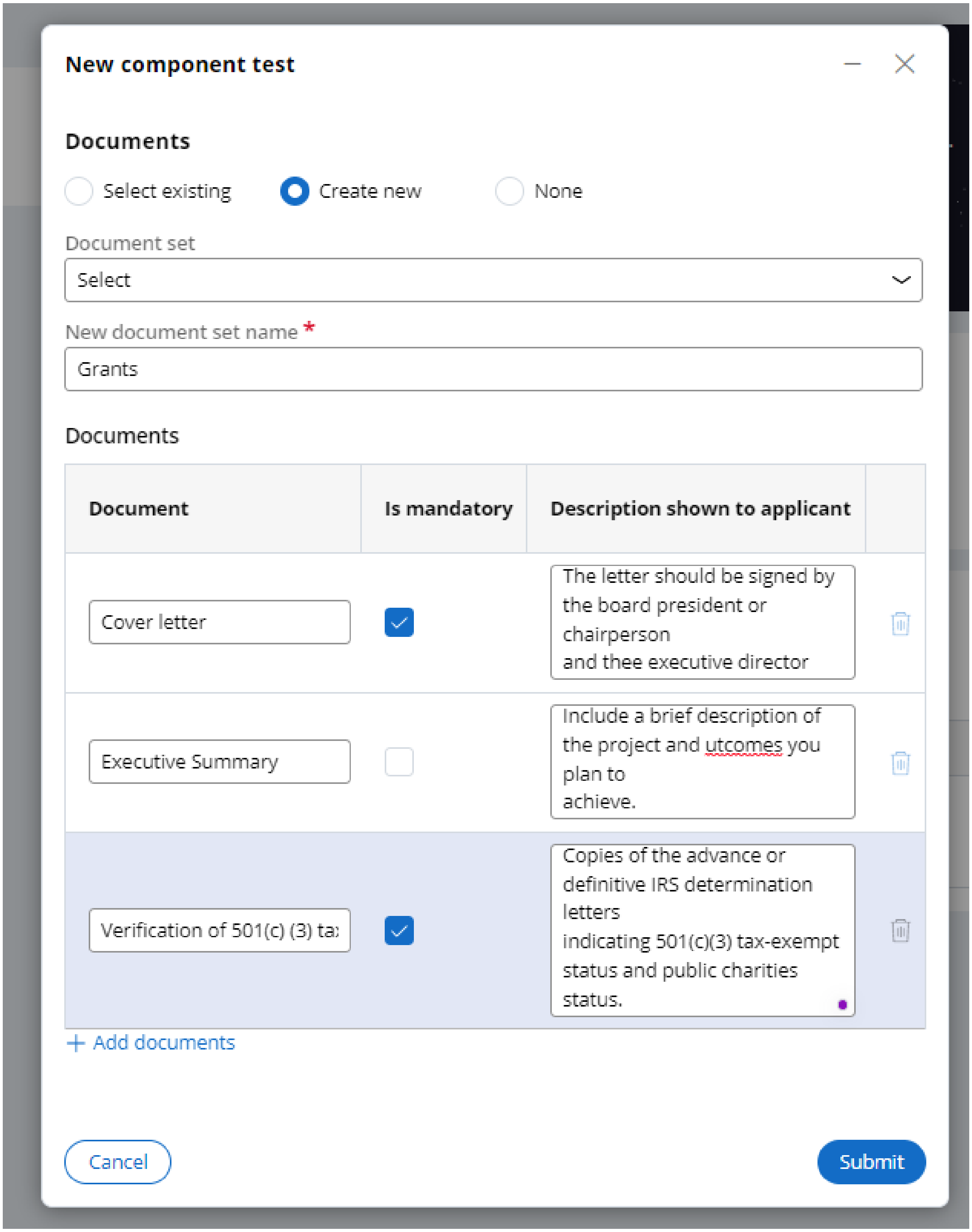


Validation criteria

Adding a new document purpose

Document configuration added as step or view for one of the case type.

1. Create Case and navigate to Document config section.
2. Select **Create New** and provide a name for the new document set.
3. Once the case is submitted, a new document set is created.



New document set

Extensions

Below are the extension data transforms to add additional parameters or to set additional configuration properties to case type. Extend them in implementation layer for any customization.

MapConfiguration (PegaPS-Work): Wrapper Data Transform with Extension. Extra Parameters can be defined and form respective configuration list based on logic.

ResetConfigValues (PegaPS-Work): Wrapper Data Transform with Extension. Extra Parameters can be added and Reset config values based on parameters

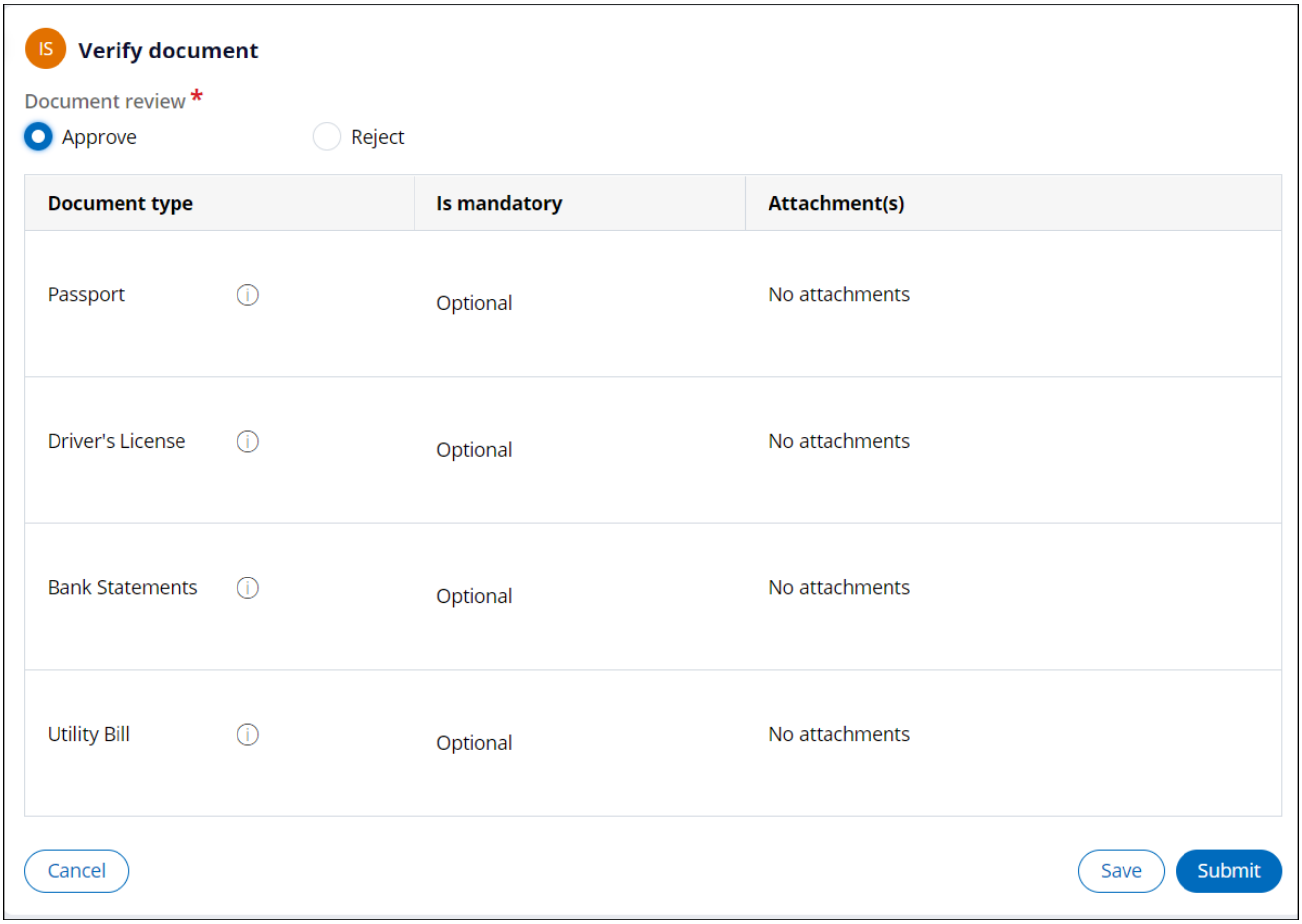
SetConfigsToCaseProperties_Ext (PegaPS-Work): Extension Data Transform to set config properties to Case type

Extending document intake

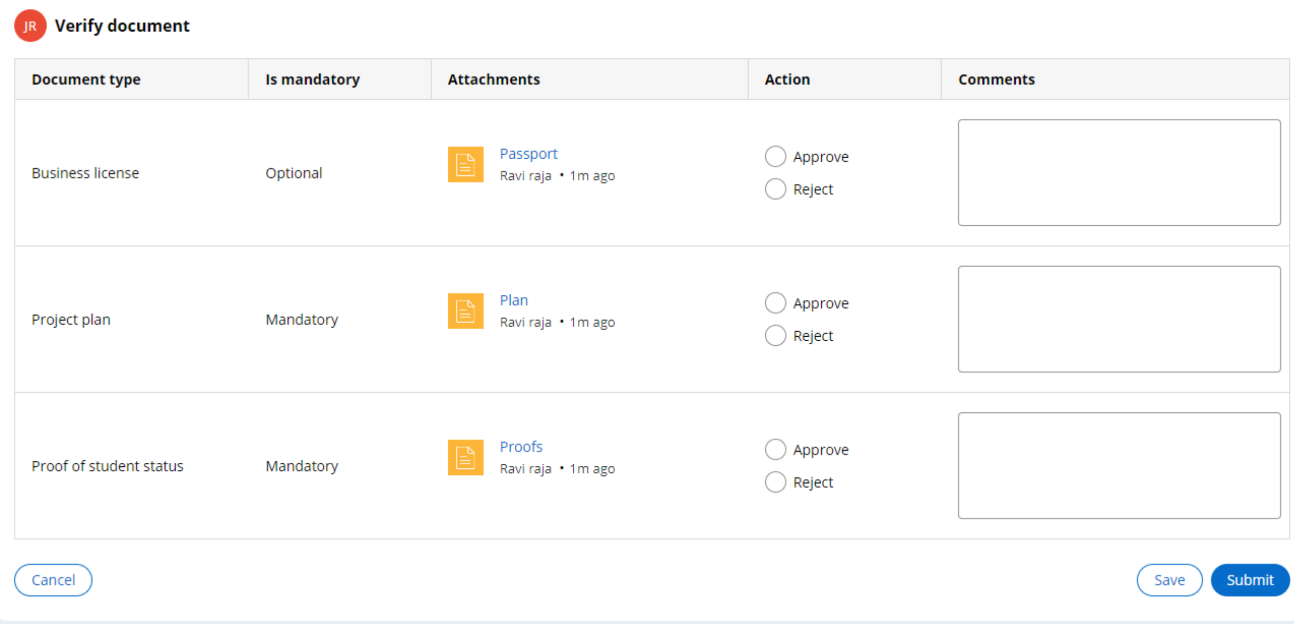
Override the *UploadDocument (PegaPS-Work)* wrapper section that is shown to the user at run time to a specific application or to a specific case to update the UI as per your requirement.

Verify document

The verify document component enables users to view the list of uploaded documents and take approval decision. You can configure a rejection action as a part of the document verification.



Users can opt to approve or reject each document with comments and configure rejection stage to route only the rejected documents.



Verify document

Configuring verify document in case designer

Configure routing details like the operator, stage, and so on based on approval decision. You can use Verify document process component in a case type as a step in any of the stages.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Verify document**.
7. Click the **Select** button.
8. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.

- To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
- To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.

9. In the **Reject stage** list select a stage to configure the rejection stage when documents are rejected as a part of the review process.
10. Check the **Approve** or **Reject specific docs** check box to reject or approve each document.
11. Click **Save**.

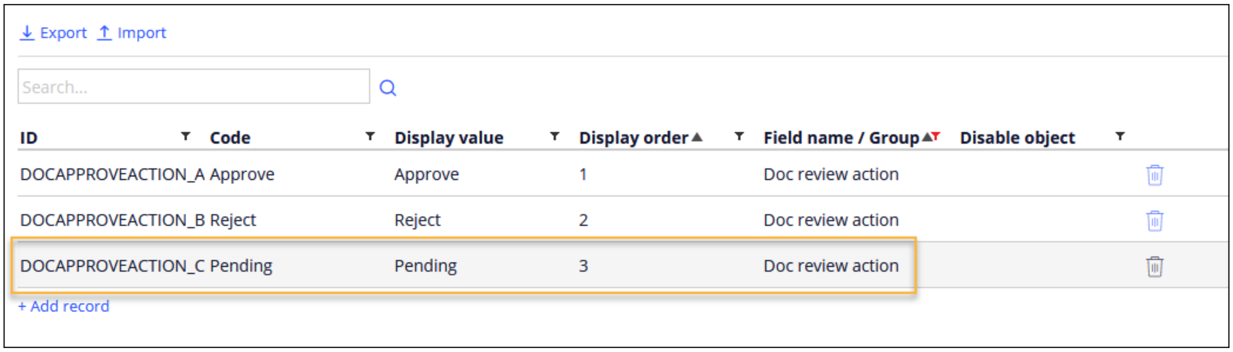
Extending verify document

Add more document review options in addition to the existing options.

VerifyDocument section (PegaPS-Work)
: The wrapper section shown to the user at run time. You can override the section to a specific application or to a specific case to update the UI as per the requirement.

VerifyDocument flow (PegaPS-Work)
: The flow that holds the logic of routing to other stage when the verification is rejected. You can override the flow to a specific class or application as per the requirement.

1. In the navigation panel of Dev Studio, click **Data types.**
2. Click **Data types** > **Option map**.
3. Click the **Records** tab.
4. Click the filter for the Field name / Group column.
5. In the **Search Text** box, enter `Doc review action` and then click **Apply**.
6. Click **Add record** to add a new record, for example, Pending.



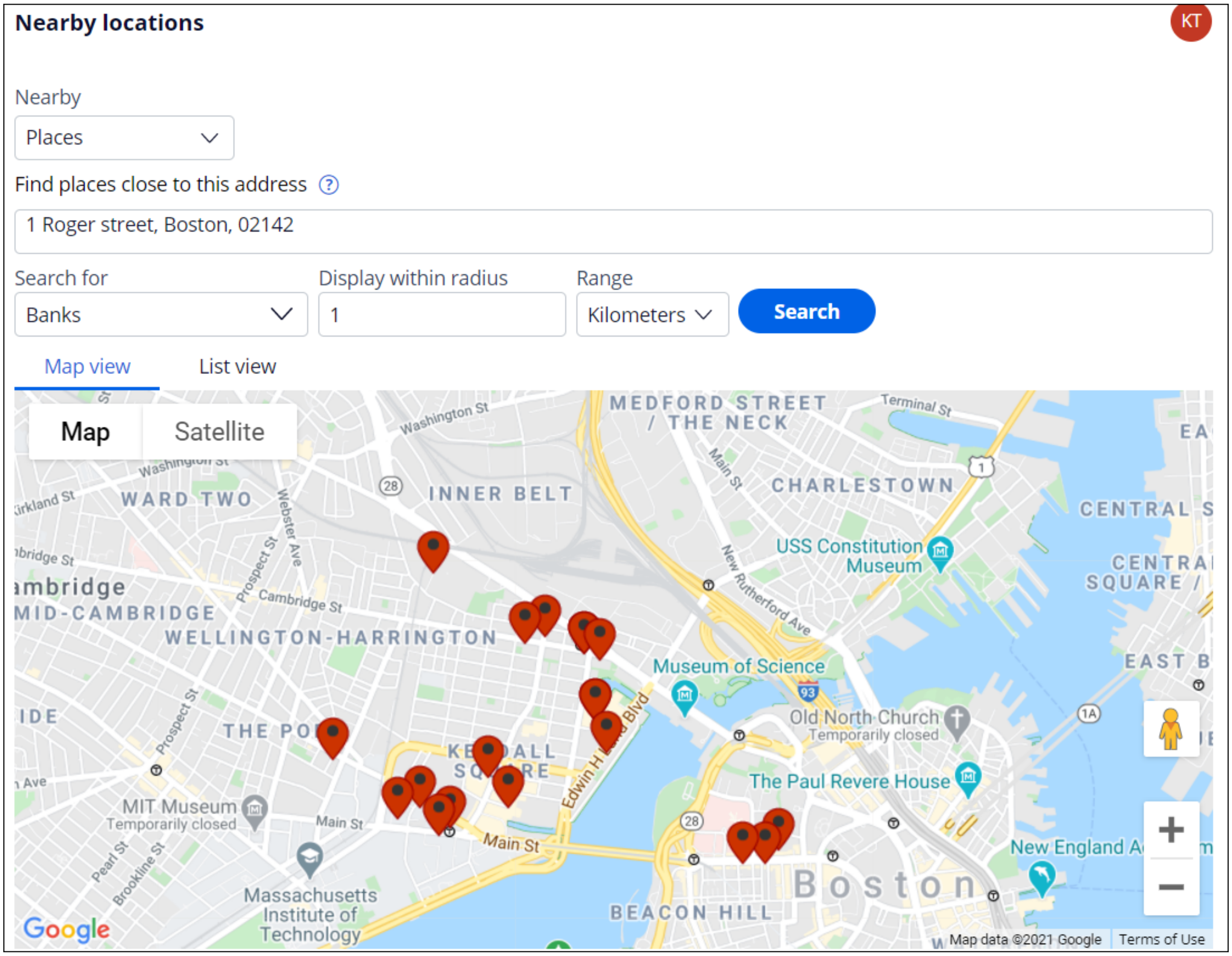
7. Update the *VerifyDocument* flow to handle the newly added Pending action.
8. Click Save.

> **Result:**
>
> After you refresh the *D_PGPOptionMapList* and *D_OptionMapList* data pages, the newly added record appears in the UI.

Nearby locations

The Nearby locations process enables you to view important nearby places such as hospitals, schools, and so on that are supported by Google's Near Me service. You can also view the nearby cases and entities that are already in the application.

For example, if there is an application for school license, any reviewer can use this component to see if there are any bars or liquor stores in the nearby area and take the approval decision based on that. Also, for any investigation case for multiple events reported, the field investigators can use this component to check the event case in the nearby area.



Configuring Nearby locations

Use the Nearby locations process component in a case type as a step in any of the stages. You can configure the base location for searching nearby cases, entities, or places either with the current location, or using a property reference.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.

5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Nearby locations**.
7. Click the **Select** button.
8. In the **Location details** section, in the **Source** list, select **Current location** to configure the current location as the base location for searching nearby cases, entities, or places.
9. Alternatively, select **By property reference**, and then enter or select a property from the combo box.
10. Select the **Enable nearby result selection** check box to select the nearby search results for further processing in the next steps or stages.
11. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.
    - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
    - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.
12. Click **Save**.
13. To show a list of selected nearby places, click the **Views** tab, and then click **Create new view**.
    a. In the **Search** box, enter `Selected nearby places`, and then click the **Add to view** icon.
14. To show a list of selected nearby cases or entities, **Views** tab, and then click **Create new view**.
    a. In the **Search** box, enter `Selected nearby cases and entities`, and then click the **Add to view** icon.
15. Click **Submit**.

Extending Nearby locations

Extend the Nearby locations component depending on the business use case and requirement.

Enabling a new case type for nearby cases search

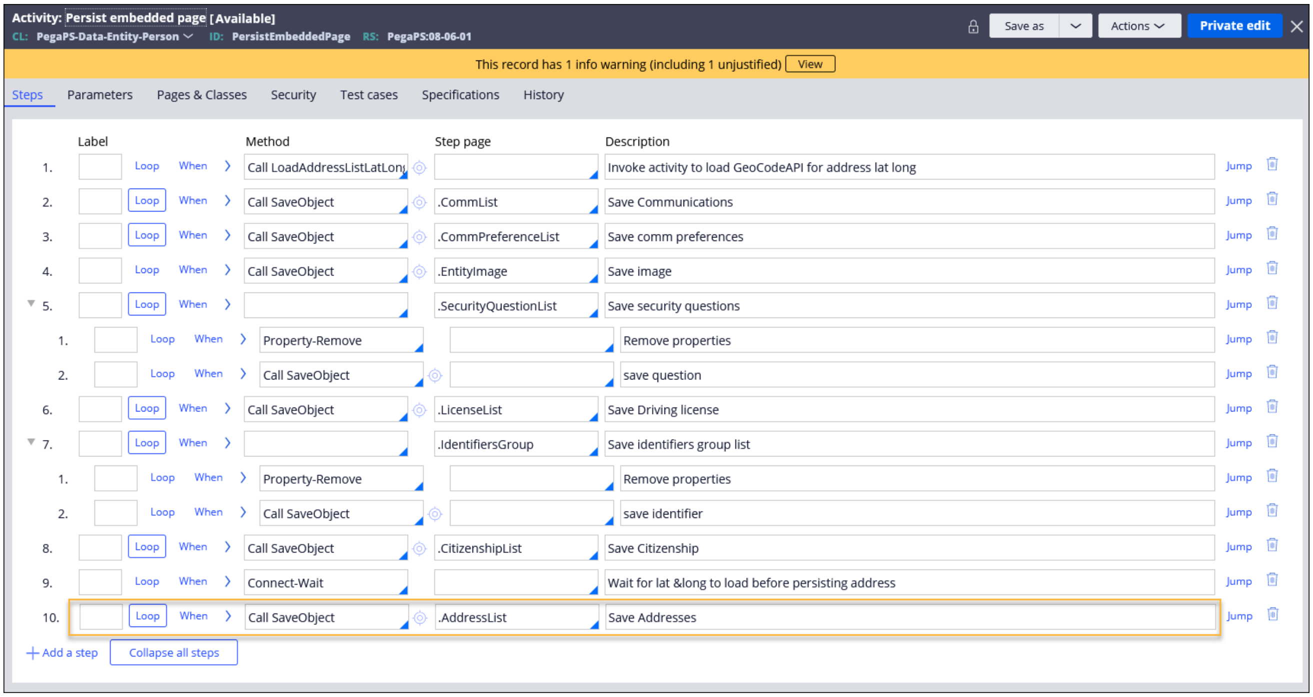
Enable a new case type to retrieve on search.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Persist proximity location.**
7. Click the **Select** button.
8. Expand Parameters and pass the property, which has the location to the process, as a parameter.

Extending a new entity for nearby entity search

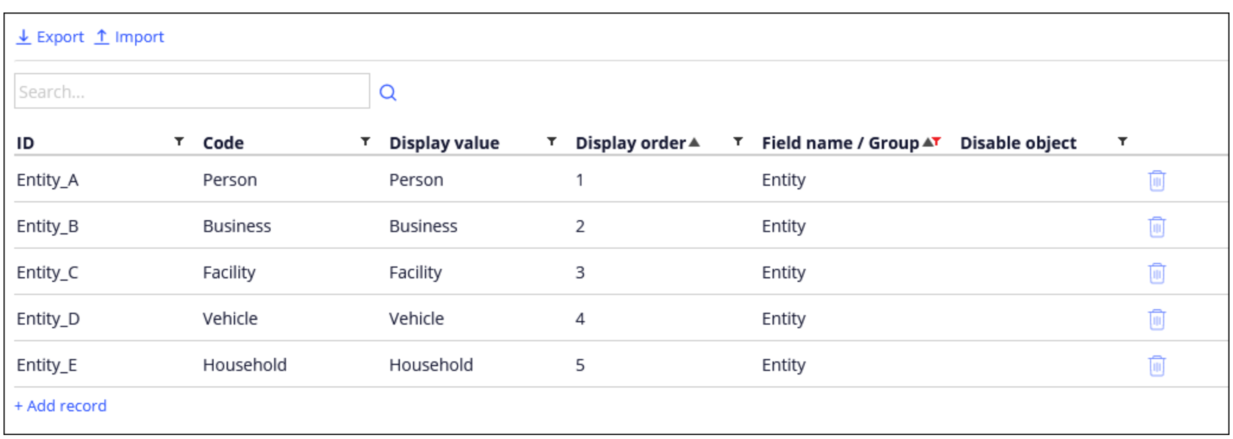
Add a new entity apart from the PGP-provided entities, as a part of nearby entity search, in the Nearby locations component.

For example, the *AddressList* property contains the addresses of a person. While saving the person details, the *PersistEmbeddedPage* activity (*CL:PegaPS-Data-Entity-Person*) runs which has the logic to save *AddressList* in *PegaPS-Data-Address* table.



Show new entity as one of the type in nearby cases and entities

1. In the navigation panel of Dev Studio, click **Data types.**
2. Click **Data types** > **Option map**.
3. Click the **Records** tab.
4. Click **Add record** to add a new entity with Field Name / Group as `Entity`.



Export Import

Search...

ID	Code	Display value	Display order	Field name / Group	Disable object
Entity_A	Person	Person	1	Entity	
Entity_B	Business	Business	2	Entity	
Entity_C	Facility	Facility	3	Entity	
Entity_D	Vehicle	Vehicle	4	Entity	
Entity_E	Household	Household	5	Entity	

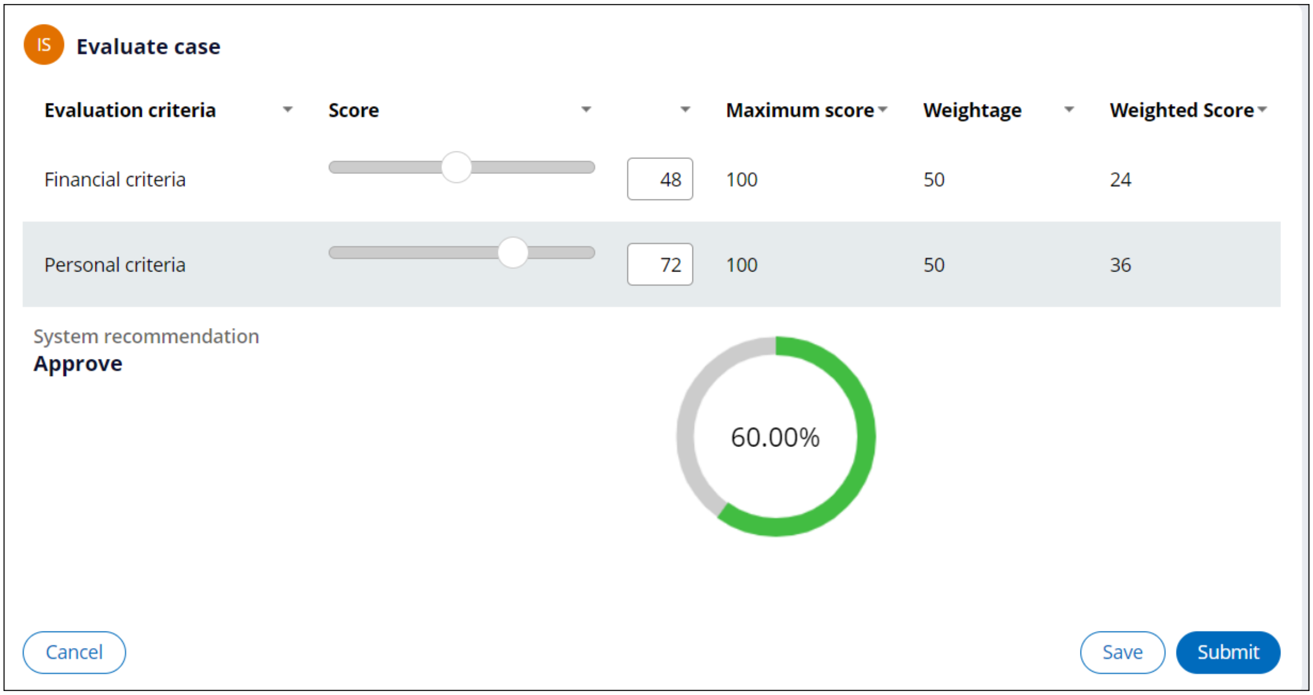
+ Add record

5. Save as *NearbyCasesList_Ext* data transform and set *pyClassName* to new entity class when *pyLabel* is new entity.
6. Save as *FetchProximityEntity* report definition (*CL:PegaPS-Data-Entity-Facility*) into New entity class and remove the Name property from columns.
7. Create a new data page similar to *D_FetchFacilityProximity* and call the report definition created in the previous step.
8. To show a different marker pin, on the map, for the new entity, save as *SetEntityMarker* data transform into the new entity class and set the *MarkerImage* property with any binary file.
9. Save as *SetNearbyAddressList_Ext* activity, and load the data page created in step 7.
10. Save as *SetNearbyCasesEntitesResult_Ext* data transform and append data page results to *NearbyCasesEntities* property.

Evaluate

The Evaluate process performs the evaluation of a case type based on the evaluation criteria.

Evaluate provides an option to select evaluation type and routing type. Based on selected evaluation type, evaluation criteria are fetched. You can provide scores against each criteria. The total scores are calculated based on its score and its weightage for each evaluation criteria.



In PGP, Evaluate configuration can be done in two ways.

- Evaluate configuration from App studio
- Evaluate configuration in runtime case

Evaluating configuration from App studio

Configuring evaluate in case designer

Use the Evaluate process component in a case type as a step in any of the stages.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.

6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Evaluate**.
7. Click the **Select** button.
8. In the **Evaluation details** section, in the **Source** list, select a source.
    a. In the **Source** list, select **By name**.
    b. In the **Evaluation type** list, select an evaluation type, for example, Grants.
    c. Alternatively, in the **Source** list, select **By property** to specify a property on the work class that supplies the specific evaluation type at run-time.
9. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.
    - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
    - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.
10. Click **Save**.

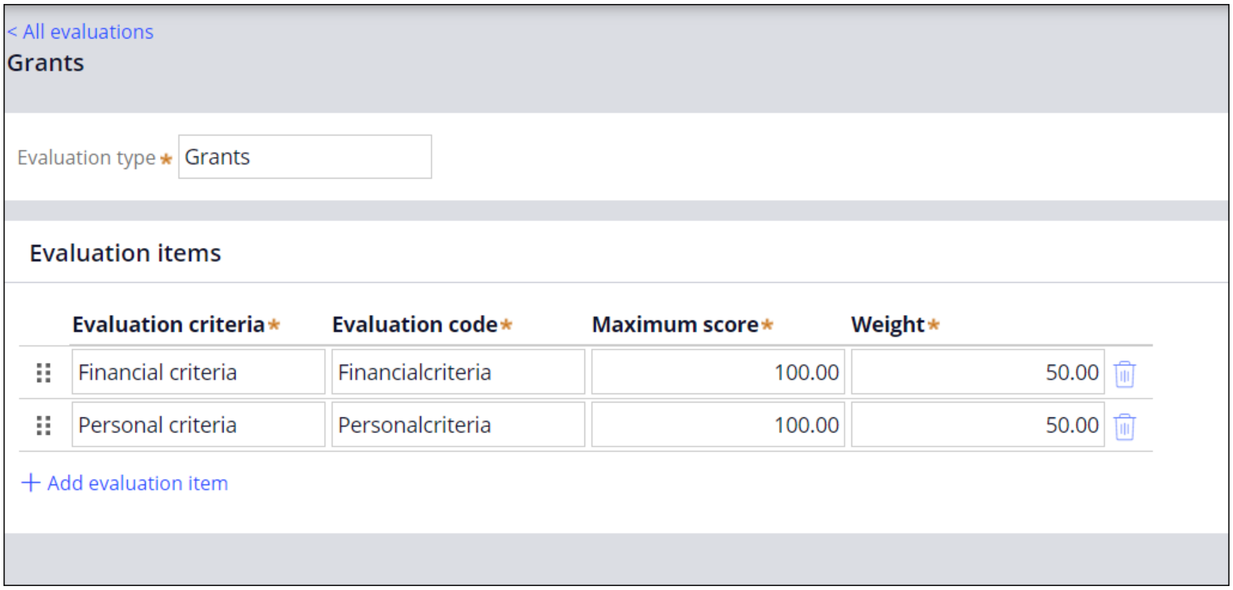
Adding a new evaluation type

Add a new evaluation type with list of evaluation criteria.

1. In the navigation pane of App Studio, click **PGP**.
2. In the PGP explorer, click **Evaluation criteria**.
3. Click the **New criteria** button to create a new evaluation type. You can also update the existing evaluation criteria.
4. In the **Evaluation type** box, enter an evaluation type.
5. In the **Evaluation items** section, click **Add evaluation item** to add a new evaluation item.
6. Enter the **Evaluation criteria**, **Evaluation code**, **Maximum score**, and **Weight**.

> **Note:** The sum of all the weights of the criteria list must be equal to 100.

7. Click **Save**.



Evaluate configuration in runtime case

Evaluation criteria configuration is a section component that can be used in any case type to configure it in runtime. Furthermore, required validations and persist feature are provided as reusable components that can be used to save or validate multiple configurations simultaneously.

User can configure the evaluation sub-configuration as follows:

- **Select existing**: Users can choose from existing configurations.
- **Create new:** User can either create new evaluation from scratch or modify an existing evaluation criteria.
- **None**: Users can choose not to configure any evaluation set for their use case.

Technical description

This component provides basic validations such as validating if evaluation set is empty and Duplicate check for evaluation. The system will throw validation errors if the evaluation set is empty and if we try to create a duplicate evaluation.

Validations provided as part of this component are as follows:

- IsEvaluationSetListEmpty
- IsEvaluationSetDuplicate
- ValidateEvaluationSetConfig

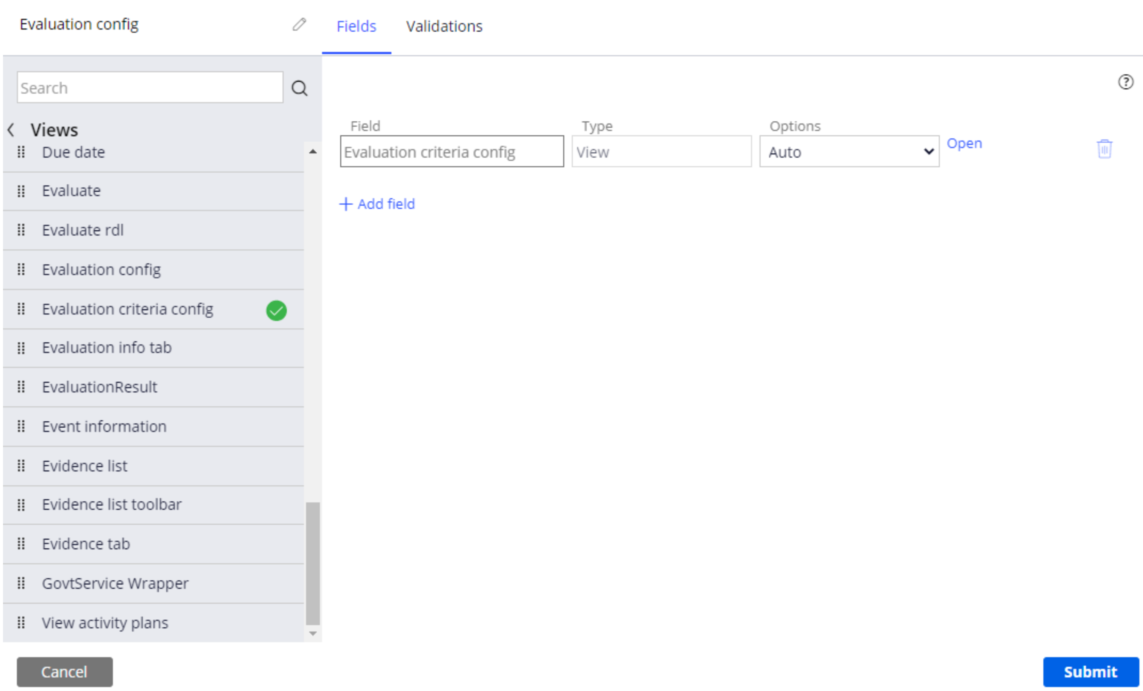
Once the evaluation criteria is entered, the same can be persisted using the **Persist configurations** flow component. The component allows multiple configurations to be saved simultaneously based on the persist flow parameters.

Configuring evaluation criteria config component in case designer

This component can be used in any case type as a step in any of the stages or as a view. Make use of the validation rules and persist configuration component provided.

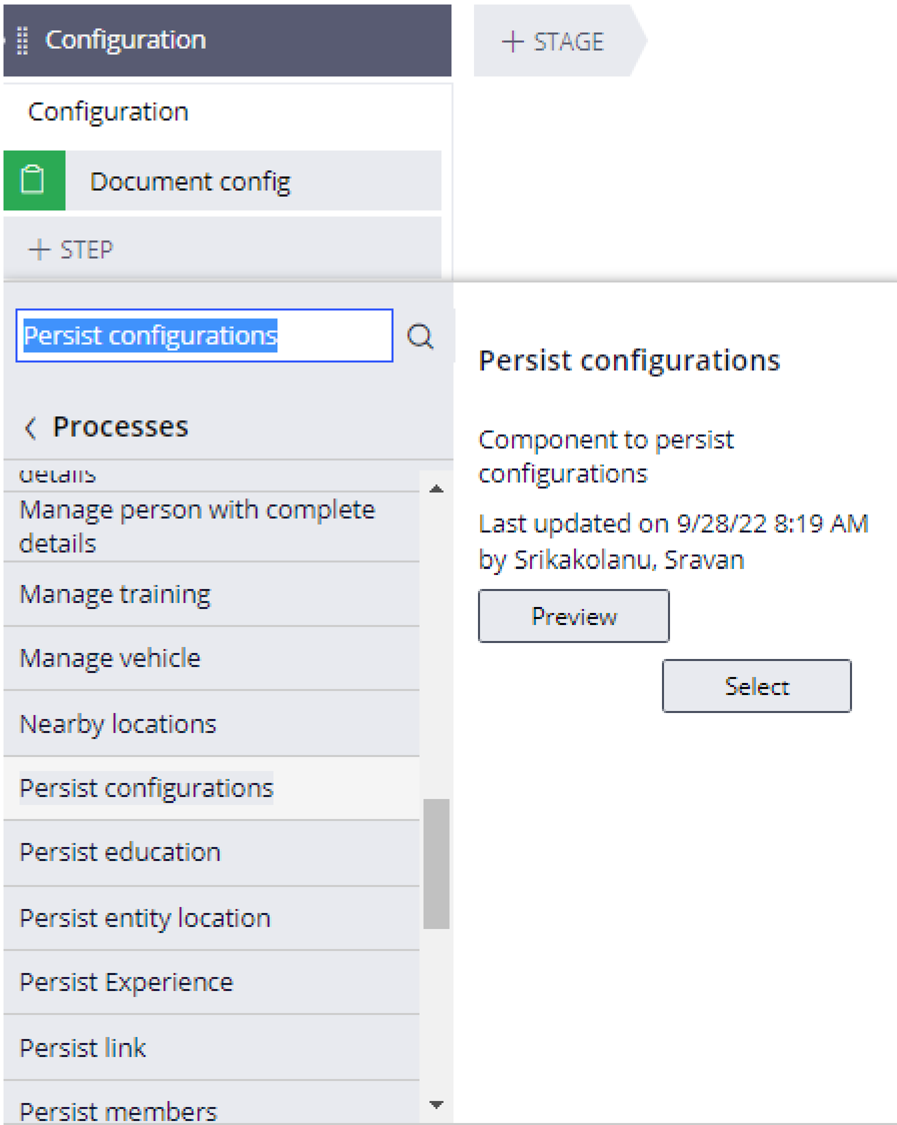
Follow these steps to configure the section component:

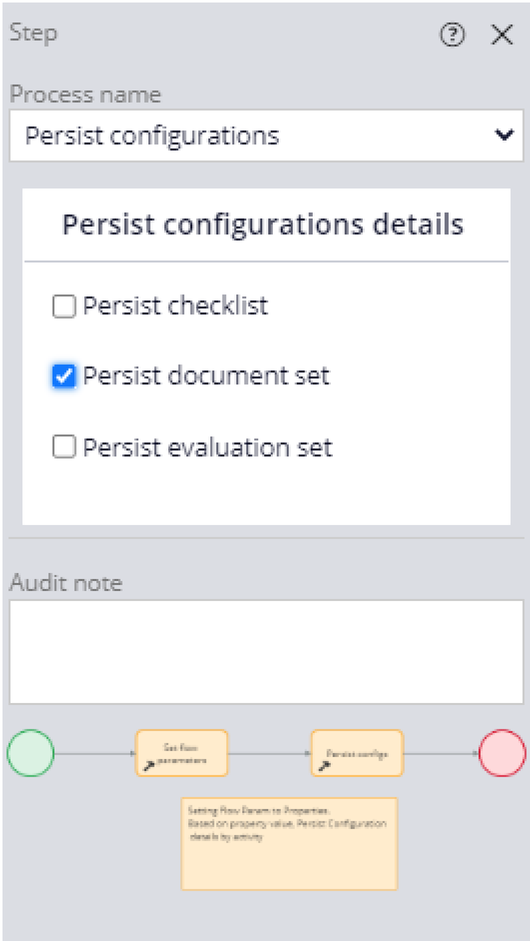
1. Invoke Evaluation component as a view and add validation. Using the persist component, you can persist case data.
    a. Click configure view and search for **Evaluation criteria config** in existing views. Add it to form as shown below



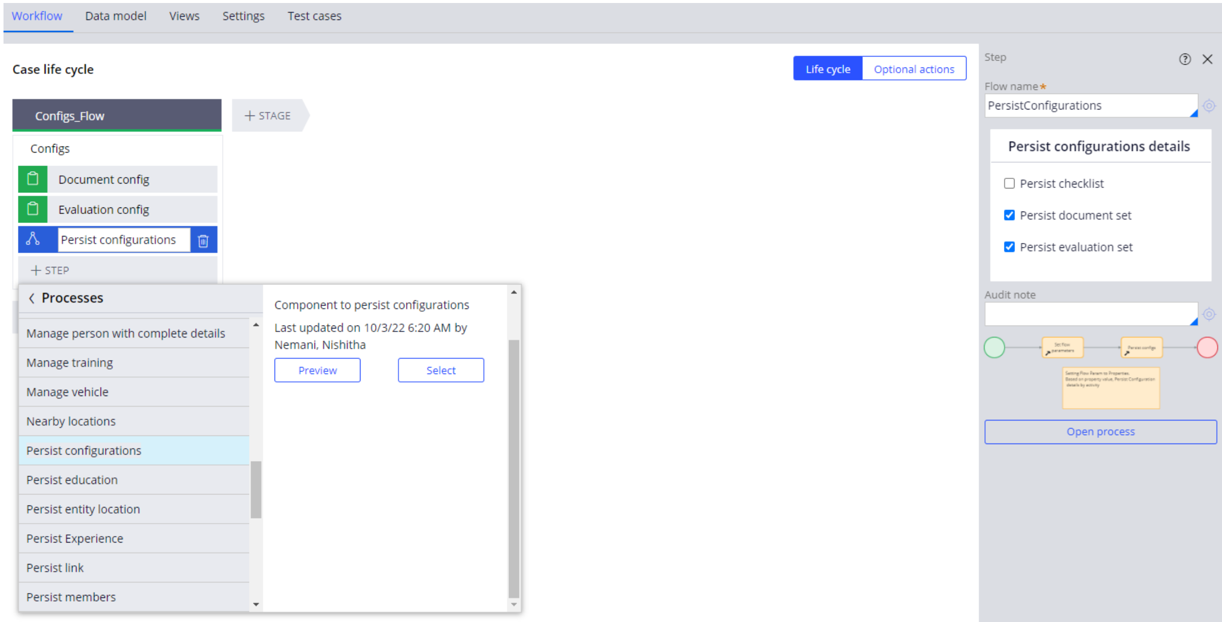
Evaluation config

2. To Persist Data to using persist component. Click on **+ Step** > **More**, search for **Persist configurations** processes and click **Select** to add it as step. Check **Persist evaluation set** checkbox.


Configuration
+ STAGE
Configuration
Document config
+ STEP
Persist configurations
Processes
Manage person with complete details
Manage training
Manage vehicle
Nearby locations
Persist configurations
Persist education
Persist entity location
Persist Experience
Persist link
Persist members
Persist configurations
Component to persist configurations
Last updated on 9/28/22 8:19 AM by Srikakolanu, Sravan
Preview
Select



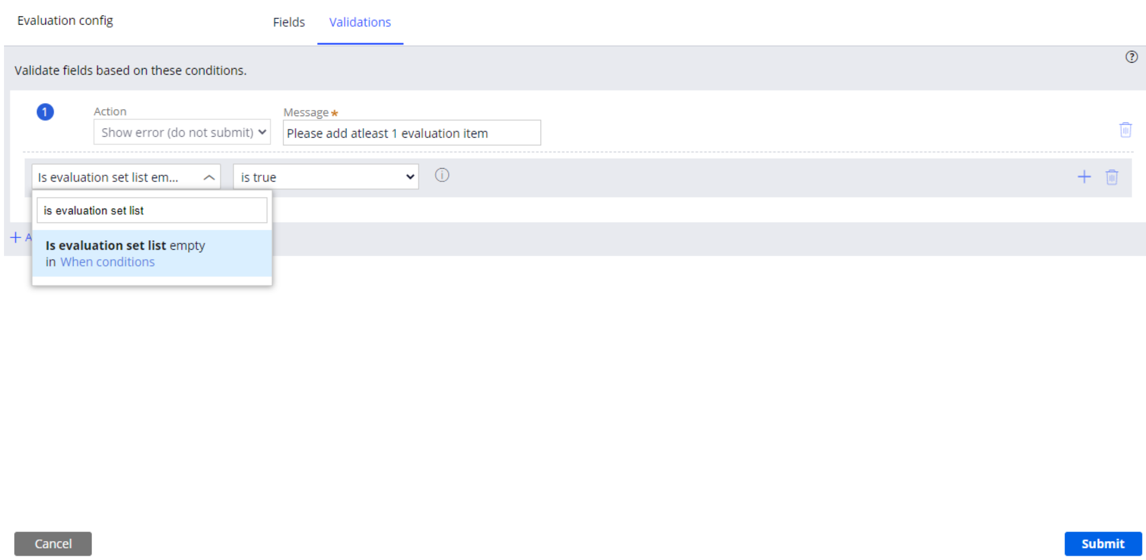
Persist doc set



Evaluate case lifecycle

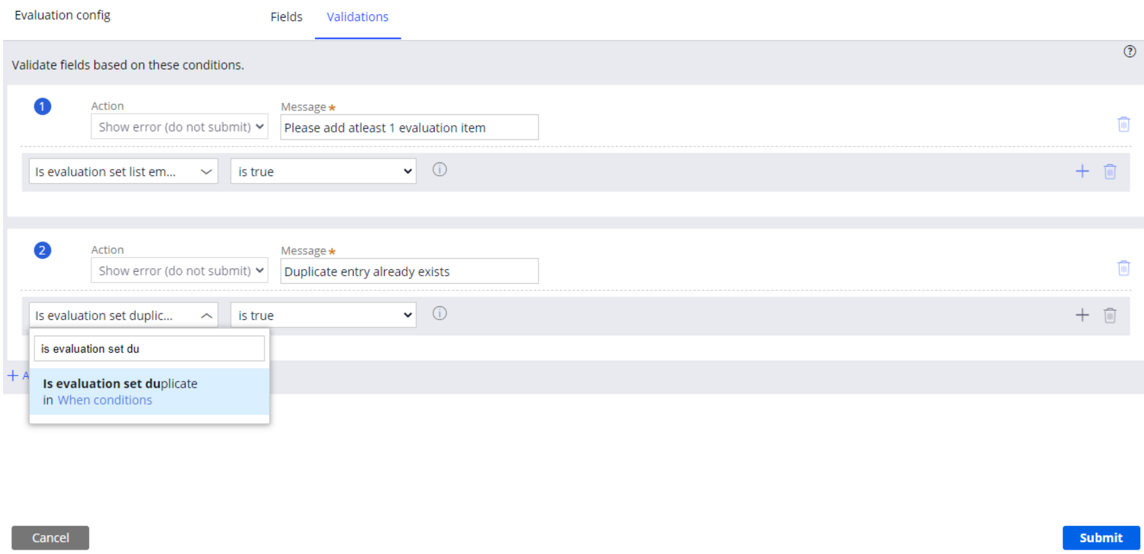
Persist configurations

3. To add Validation from App studio
   a. Go to **Configure view** of step, switch to **Validations** tab. Search for *IsEvaluationSetListEmpty* to validate empty config list. (Select if needed)



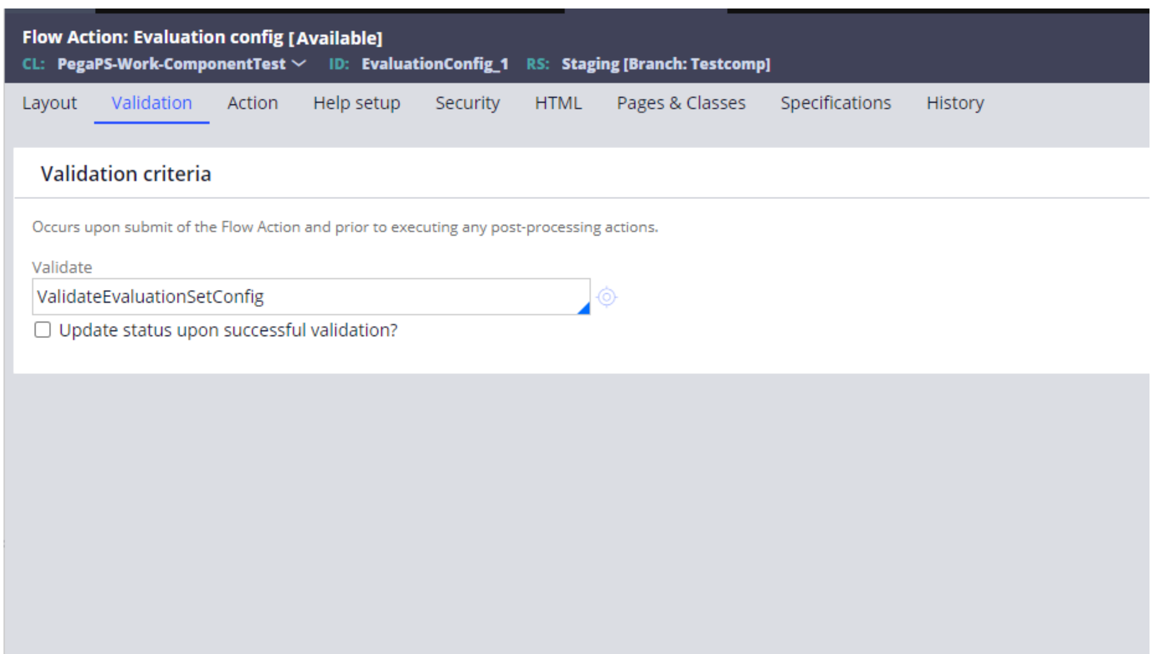
Evaluation validation

   b. Search for *IsEvaluationSetDuplicate* when condition as shown for duplicate entry.



Duplicate entry

4. To invoke validation rule, open Flow action from Dev studio.
    a. For all validations call *ValidateEvaluationSetConfig* (under Validate tab).



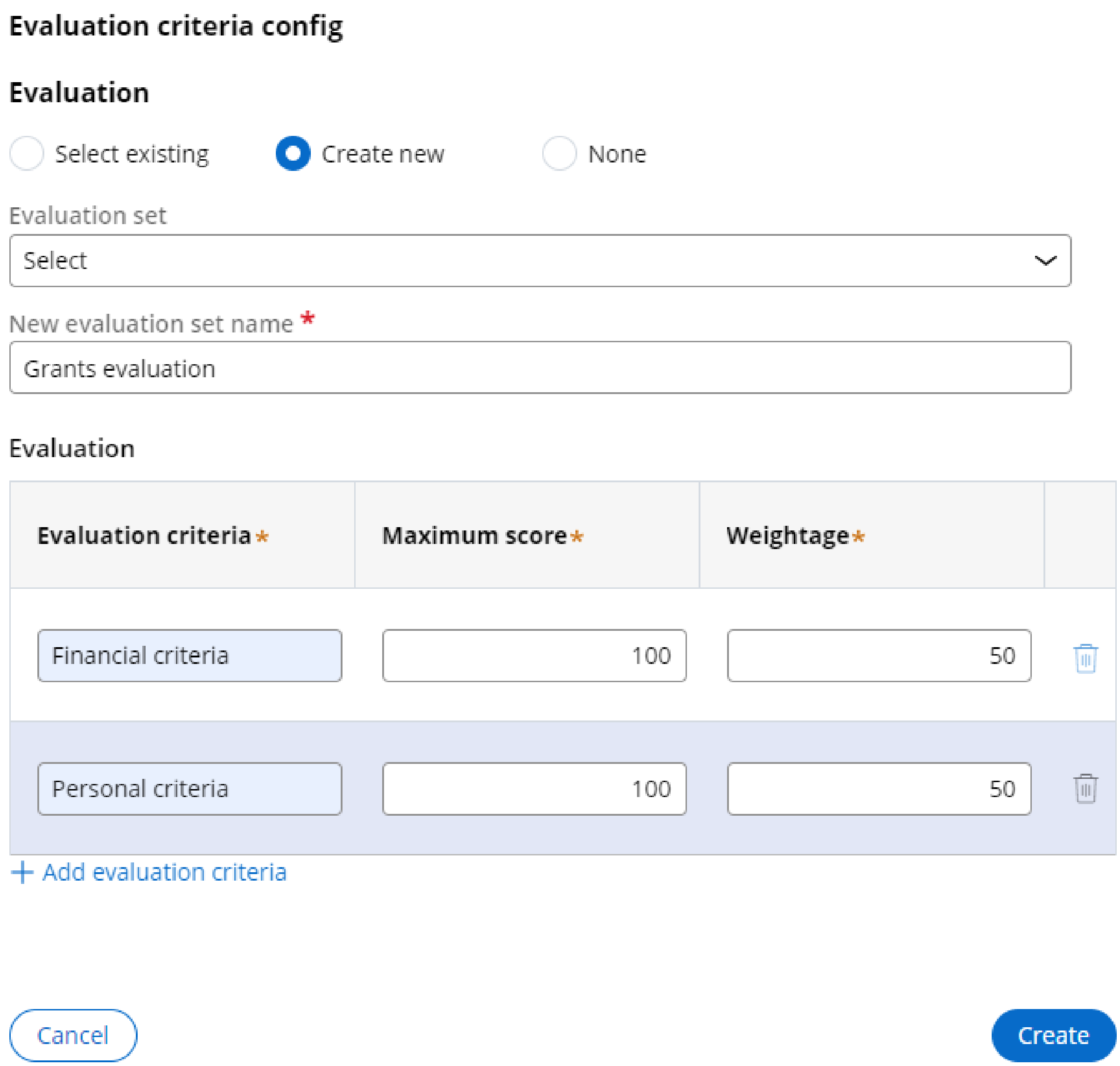
Validation criteria

Adding a new evaluation type

Evaluation configuration added as view for one of the case type.

1. Create Case and navigate to **Evaluation config** section

2. Select **Create New** and provide new evaluation set name
3. Once the case is submitted, a new evaluation set is created.



New evaluation set

Extensions

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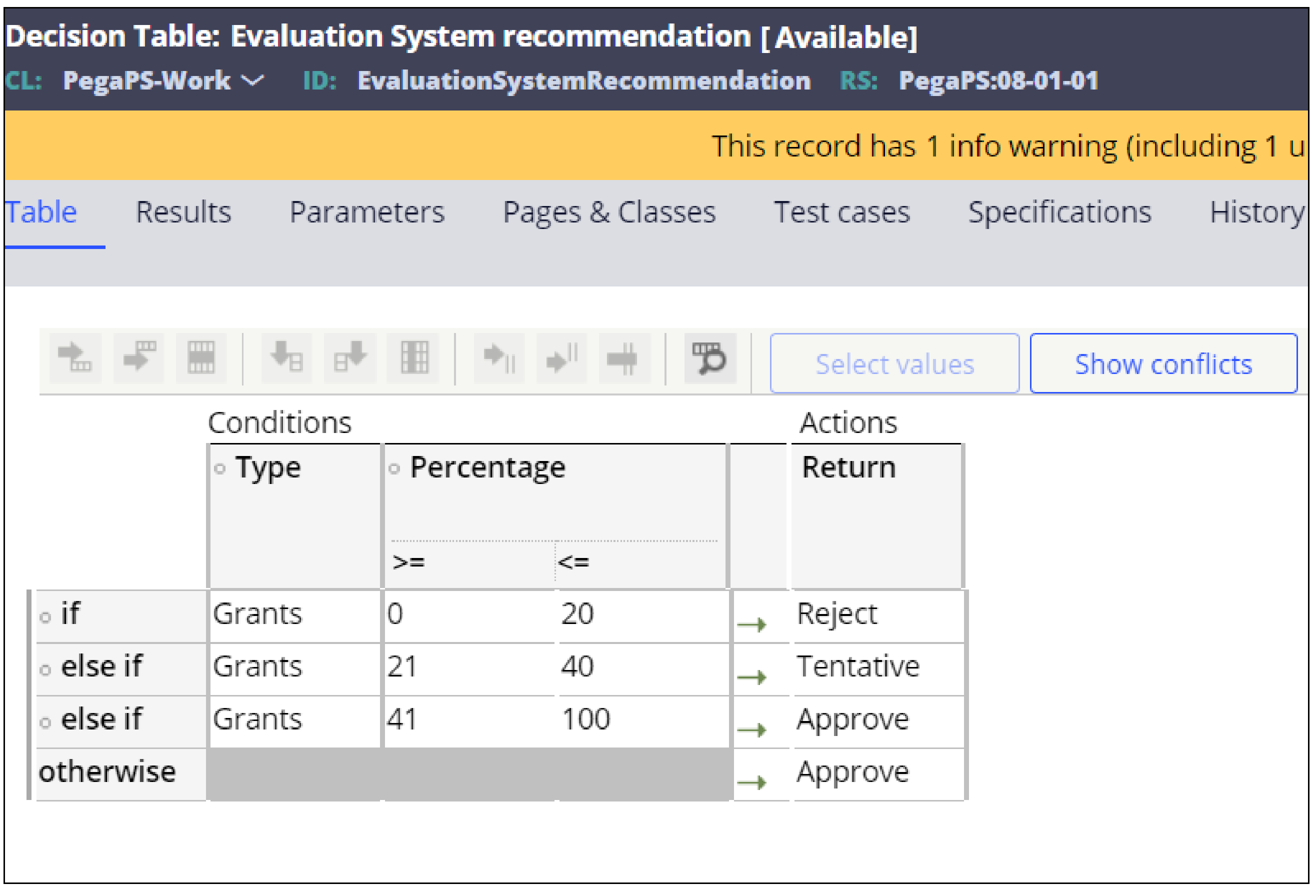
ResetConfigValues (PegaPS-Work): Wrapper Data Transform with Extension. Extra Parameters can be added and Reset config values based on parameters

SetConfigsToCaseProperties_Ext (PegaPS-Work): Extension Data Transform to set config properties to Case type

Extending evaluate

Configure the system recommendation for the newly added type or for an existing type as you do it in the Grants example.

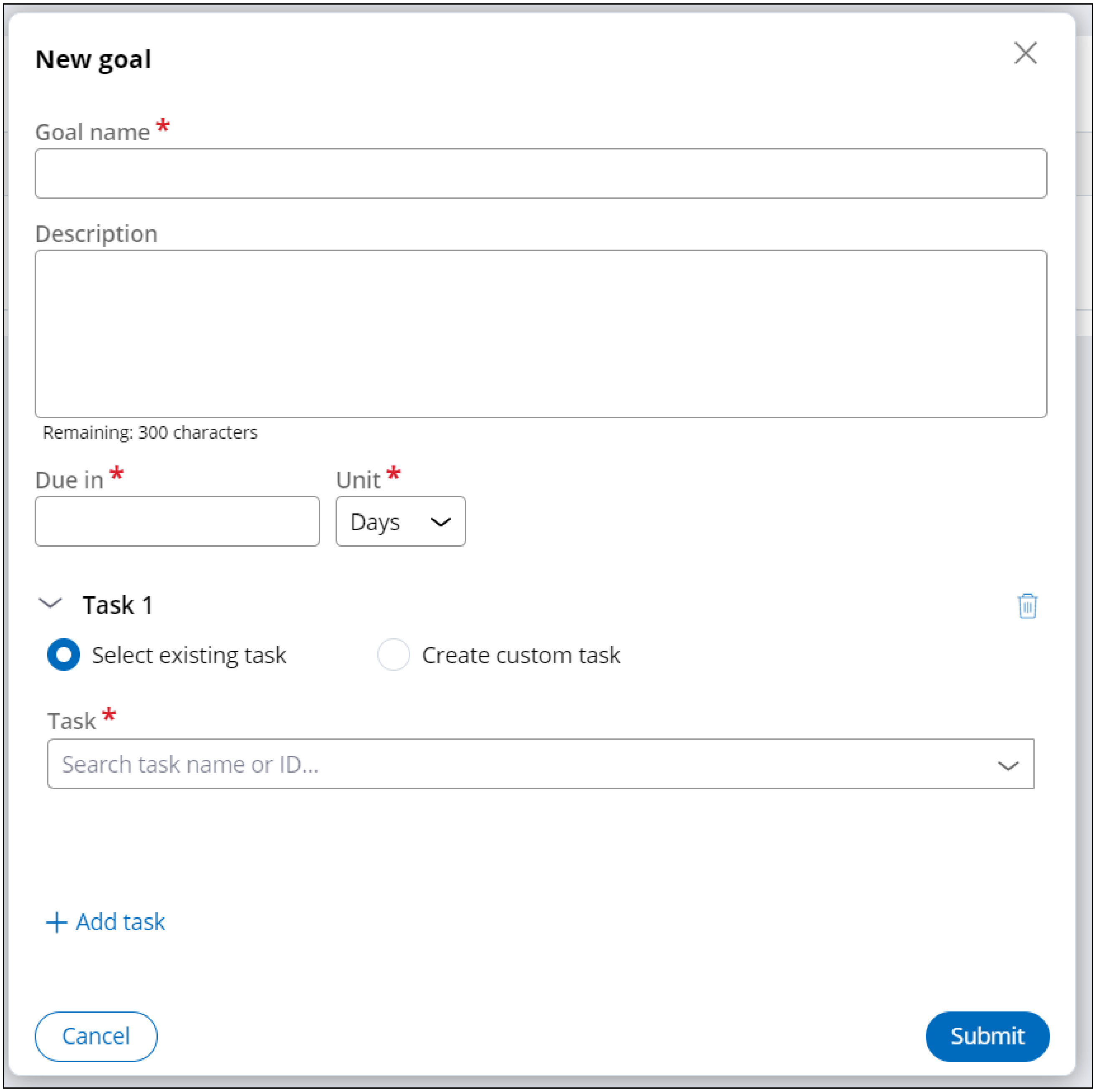


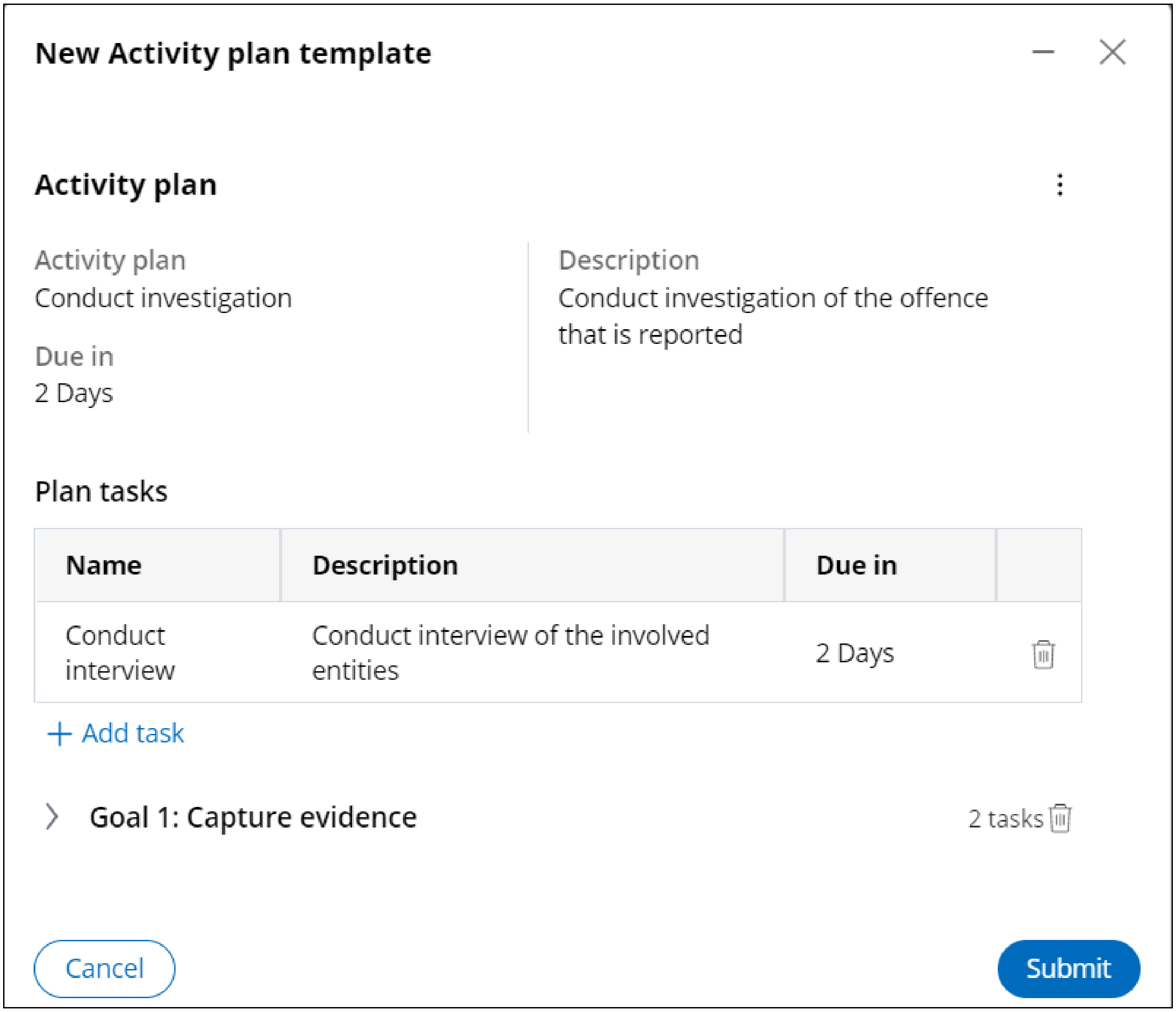
Activity plan

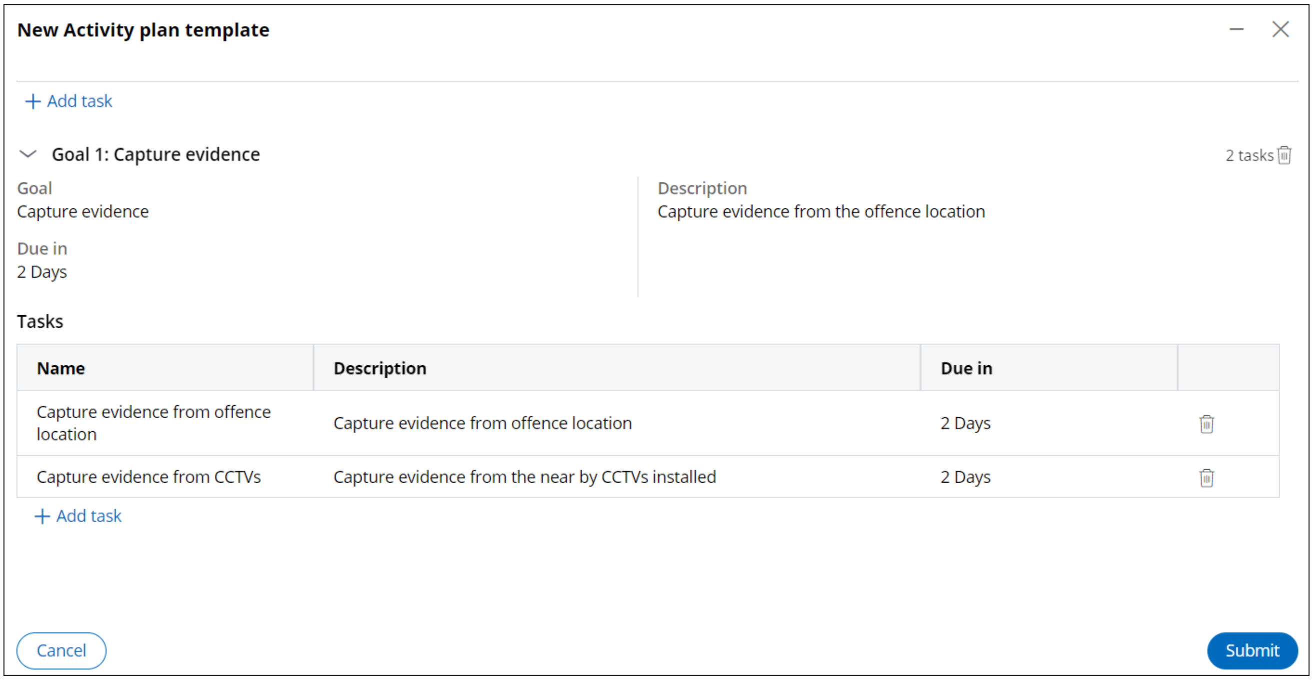
Represent tasks and goals in an activity plan, and assign those tasks and goals to team members associated with the investigation. You can use activity plan as an optional action for an existing case as a case component. You can show the list of plans conducted on a case in a hierarchical table.

The activity plan landing page supports managing the plan templates, goals, and tasks. Managers or supervisors can create activity plan templates from the activity plan landing page. Each activity plan template can have any number of tasks and goals in it. You can develop activity plan templates using the *PegaPS-Work-Manage-ActivityPlan* case type. The captured plan template details are stored as instances of the*PegaPS-Data-Config-ActivityPlan* class.

Standalone tasks and goals can be created without creating the plan templates. Each goal should contain at least one task; you can create a custom task or add an existing task. When you create a task or a goal, PGP creates an instance of *PegaPS-Data-Config-Task* and *PegaPS-Data-Config-Goal* classes.

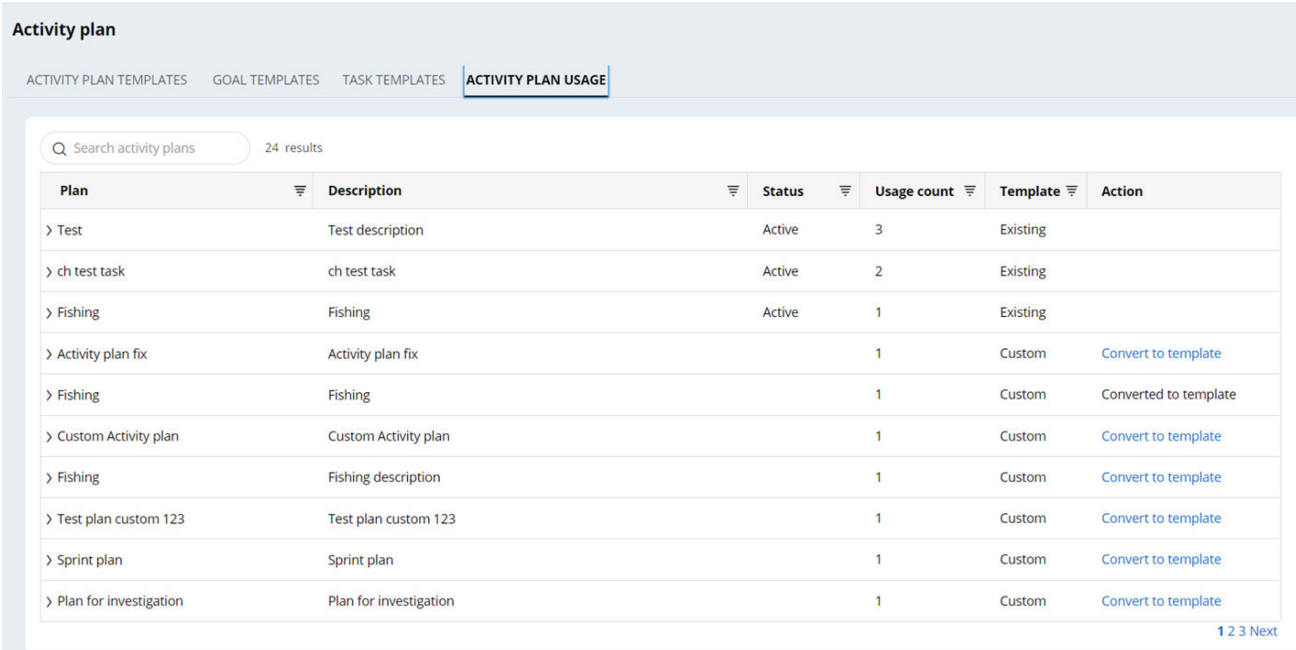

New goal
Goal name *
Description
Remaining: 300 characters
Due in *
Unit *
Days
Task 1
Select existing task
Create custom task
Task *
Search task name or ID...
+ Add task
Cancel
Submit


New Activity plan template
Activity plan
Activity plan
Conduct investigation
Due in
2 Days
Description
Conduct investigation of the offence that is reported
Plan tasks
Name
Description
Due in
Conduct interview
Conduct interview of the involved entities
2 Days
Add task
Goal 1: Capture evidence
2 tasks
Cancel
Submit



Report for plans and option to convert to template

Pega Government Platform provides a new tab called “Activity Plan Usage” in Activity Plan landing page. Under this tab, we can see the list plan templates that are used during creation of Activity plan case from Investigation or any other case. On expanding each row, the goals and tasks under each plan can be viewed. We can view different details about the templates like the name, description, status, how many times the template has been used, is it an existing or custom template, and if plan is a custom template giving an option to convert it to a new plan template in the system. Using search field, we can also search for any activity plan.



Activity plan

ACTIVITY PLAN TEMPLATES | GOAL TEMPLATES | TASK TEMPLATES | **ACTIVITY PLAN USAGE**

Search activity plans 24 results

Plan	Description	Status	Usage count	Template	Action
Test	Test description	Active	3	Existing	
ch test task	ch test task	Active	2	Existing	
Fishing	Fishing	Active	1	Existing	
Activity plan fix	Activity plan fix		1	Custom	Convert to template
Fishing	Fishing		1	Custom	Converted to template
Custom Activity plan	Custom Activity plan		1	Custom	Convert to template
Fishing	Fishing description		1	Custom	Convert to template
Test plan custom 123	Test plan custom 123		1	Custom	Convert to template
Sprint plan	Sprint plan		1	Custom	Convert to template
Plan for investigation	Plan for investigation		1	Custom	Convert to template

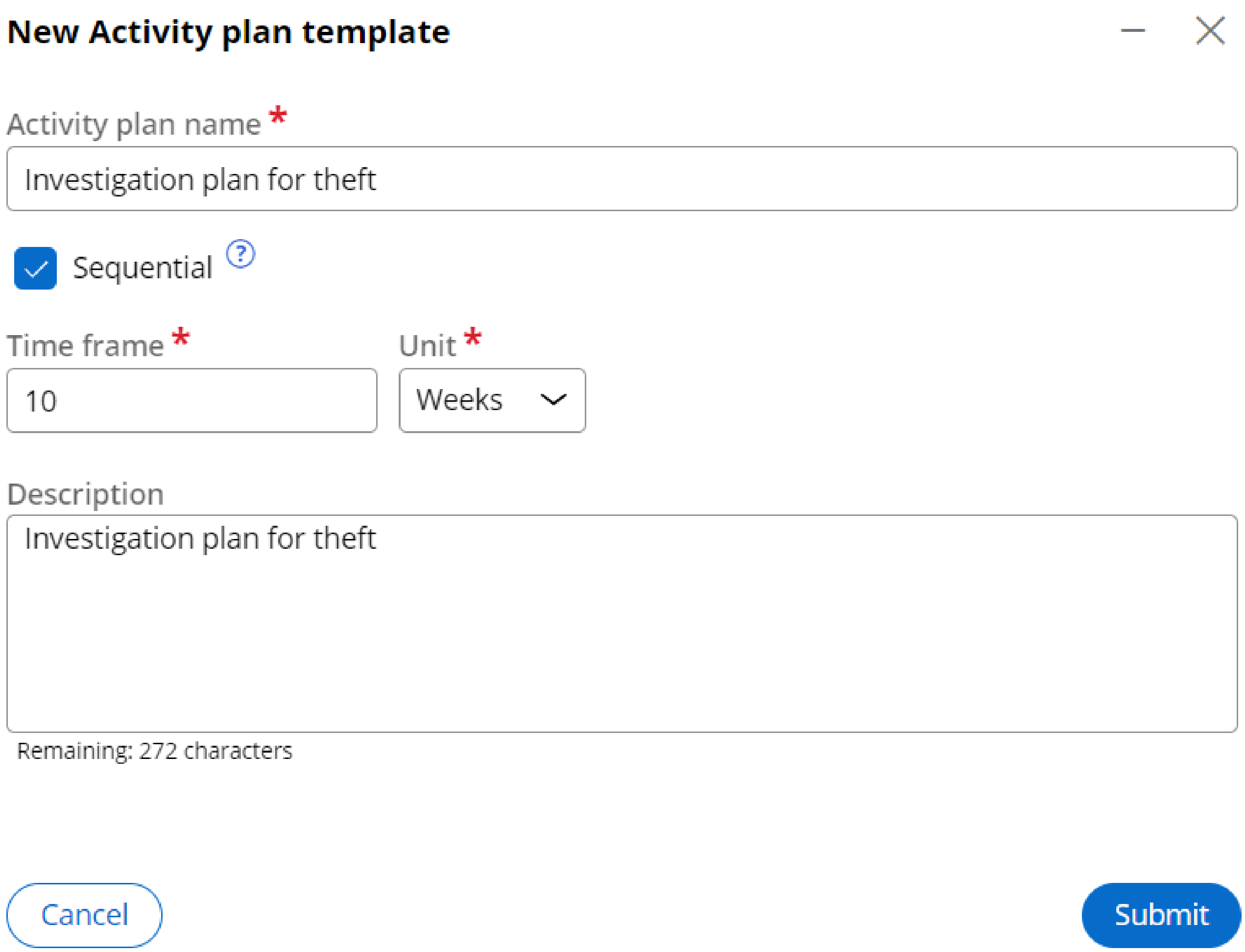
1 2 3 Next

Activity plan usage

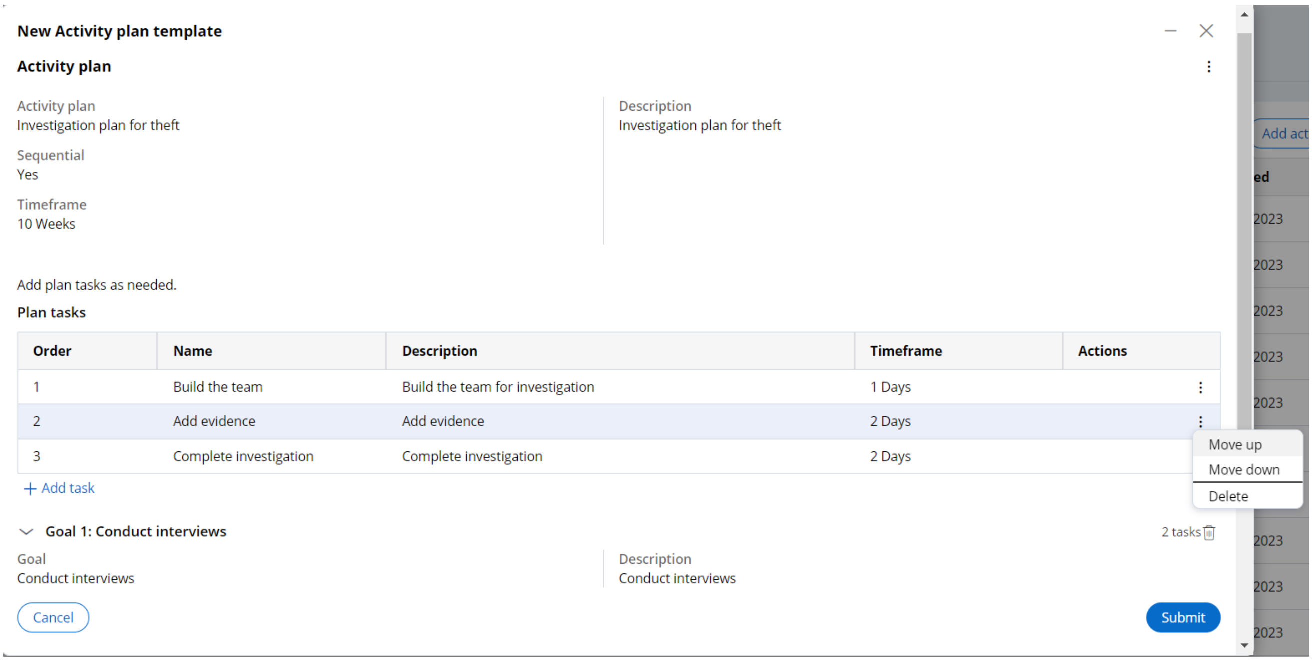
Sequencing an activity plan

The activity plan feature is enhanced in PGP release '23 to support sequencing of activity plan goals and tasks. This feature helps in sequencing the goals and tasks of an activity plan by providing the order or sequence for creation of goals and tasks. Once a sequence is set, the goals and tasks within the plan will be created as per the sequence. The next task or goal will be created only after the previous task is resolved. This feature can be used by selecting Sequential checkbox while creating an activity plan template or any run time activity plan case.

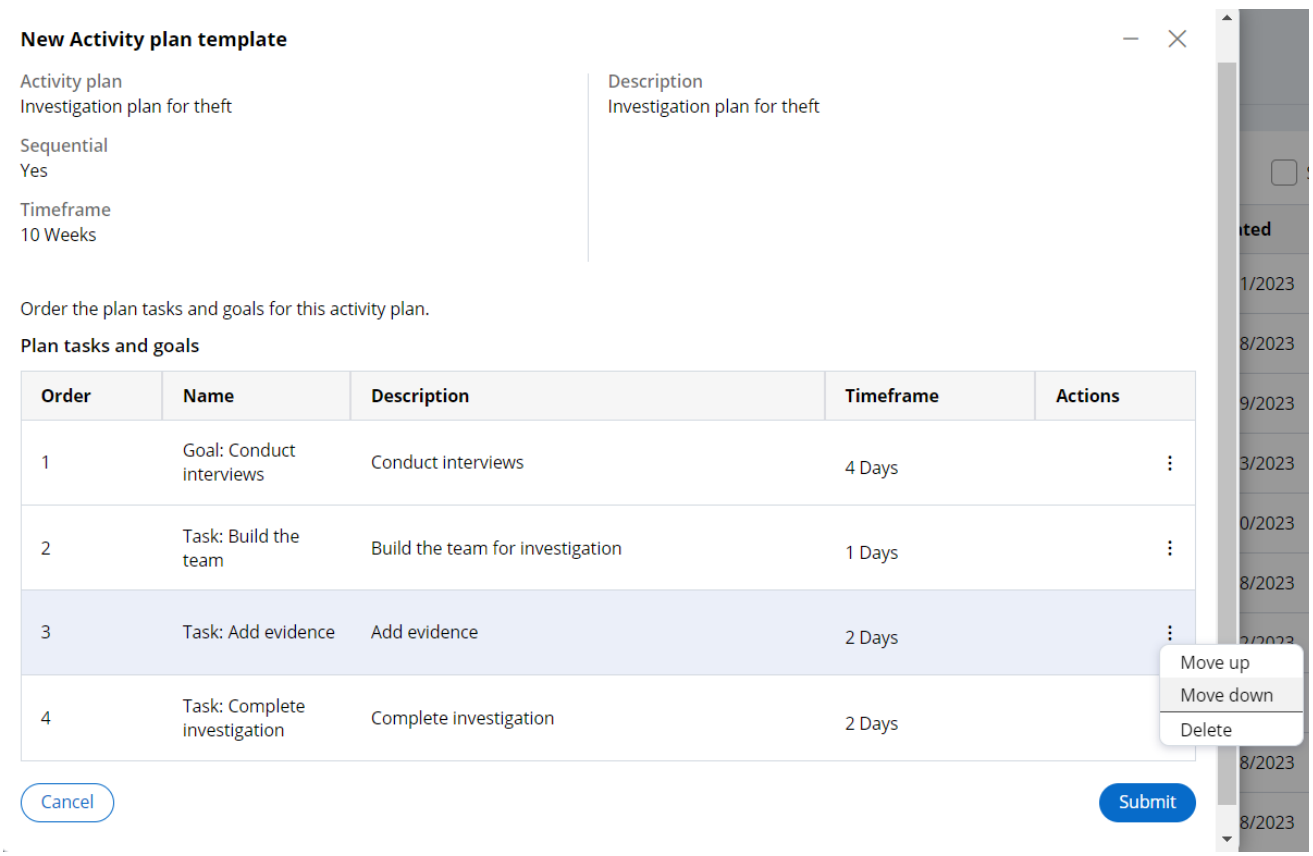
While creating a template, user can check the **Sequential** check box. In Goals and tasks screen, the tasks within the goals can be sequenced or reordered using menu option or drag action. In the Reorder plan tasks and goals screen, user can sequence plan's goals and tasks using menu options or drag action. The same functionality is applicable for both template and run time activity plan case.



New activity plan template

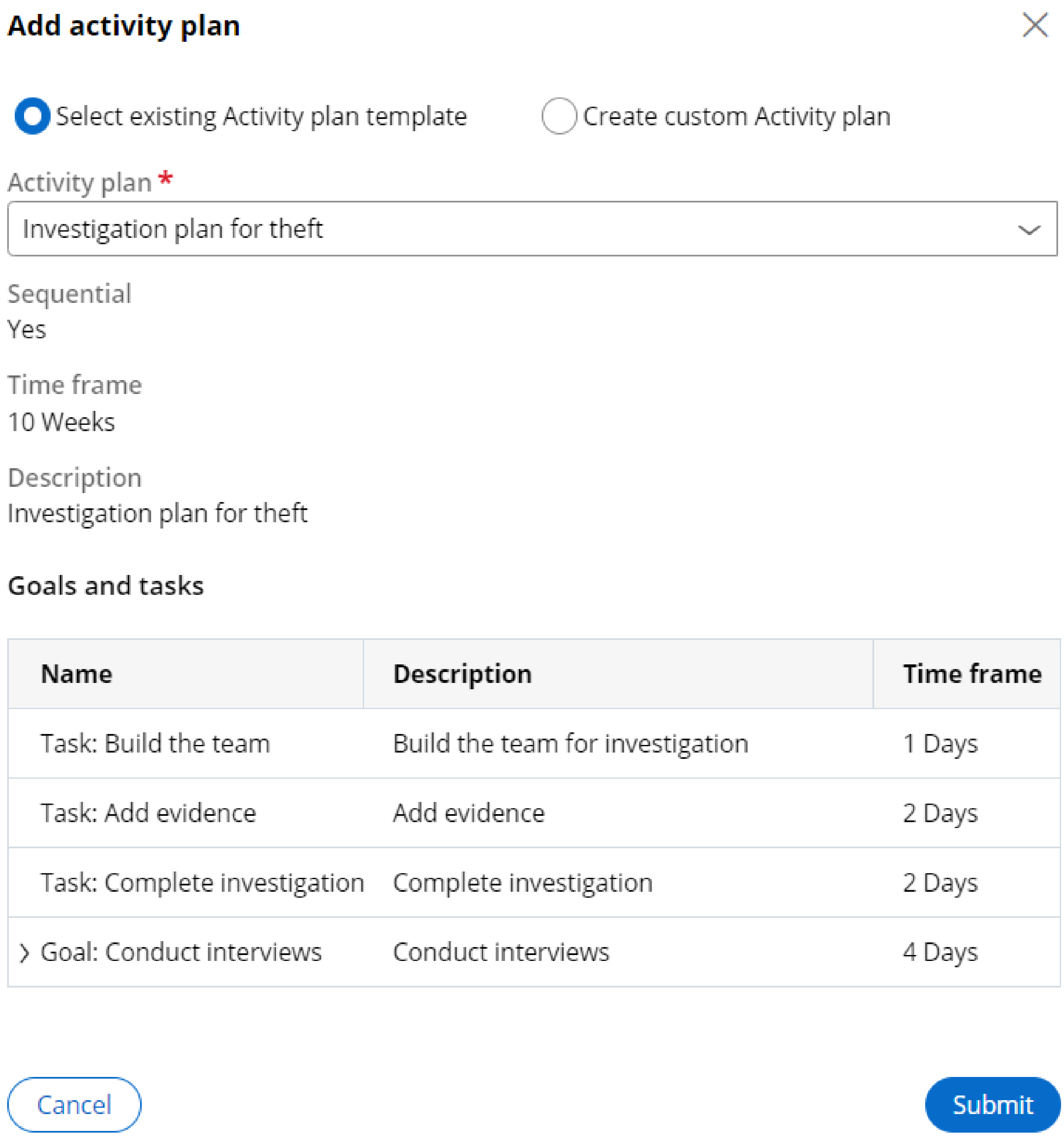


New activity plan template

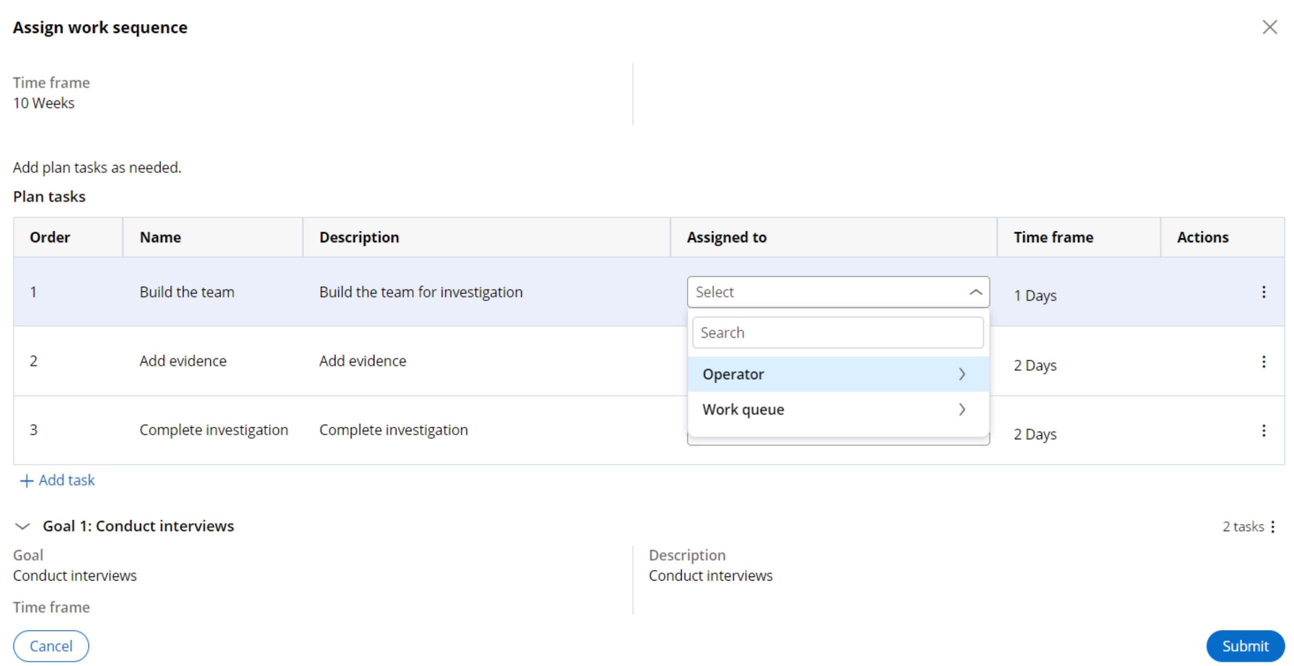


Activity plan

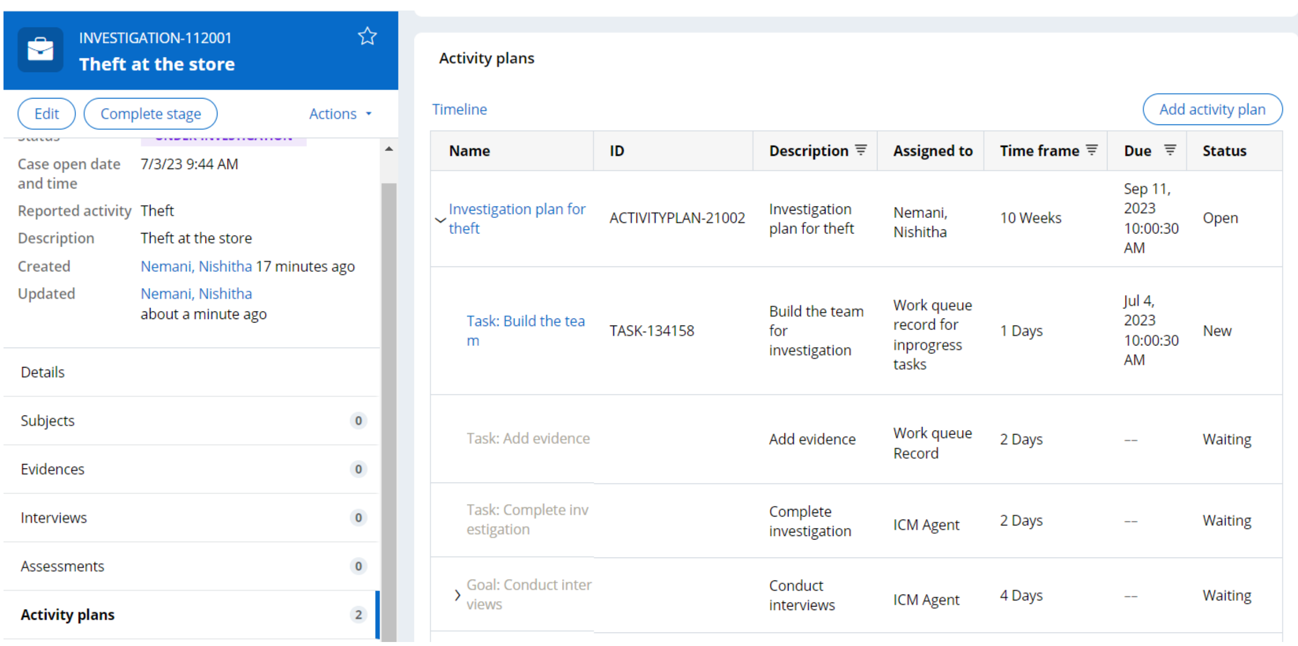
When a sequential template plan is used in an investigation case, the goals and tasks would be shown in the order defined in the template. This sequence can be modified in the case as required. Goals and tasks can be assigned to the operator or work queue. Once a sequence is set and tasks and goals are assigned, the goals and tasks within the plan will be created as per the sequence. The next task or goal will be created and assigned only after the previous task is resolved. In the details tab of the case, the tasks which are not created are displayed with "waiting" status and are greyed out. Users can also create custom sequential plans in the runtime and define the order of creation as required.



Add activity plan



Assign work sequence

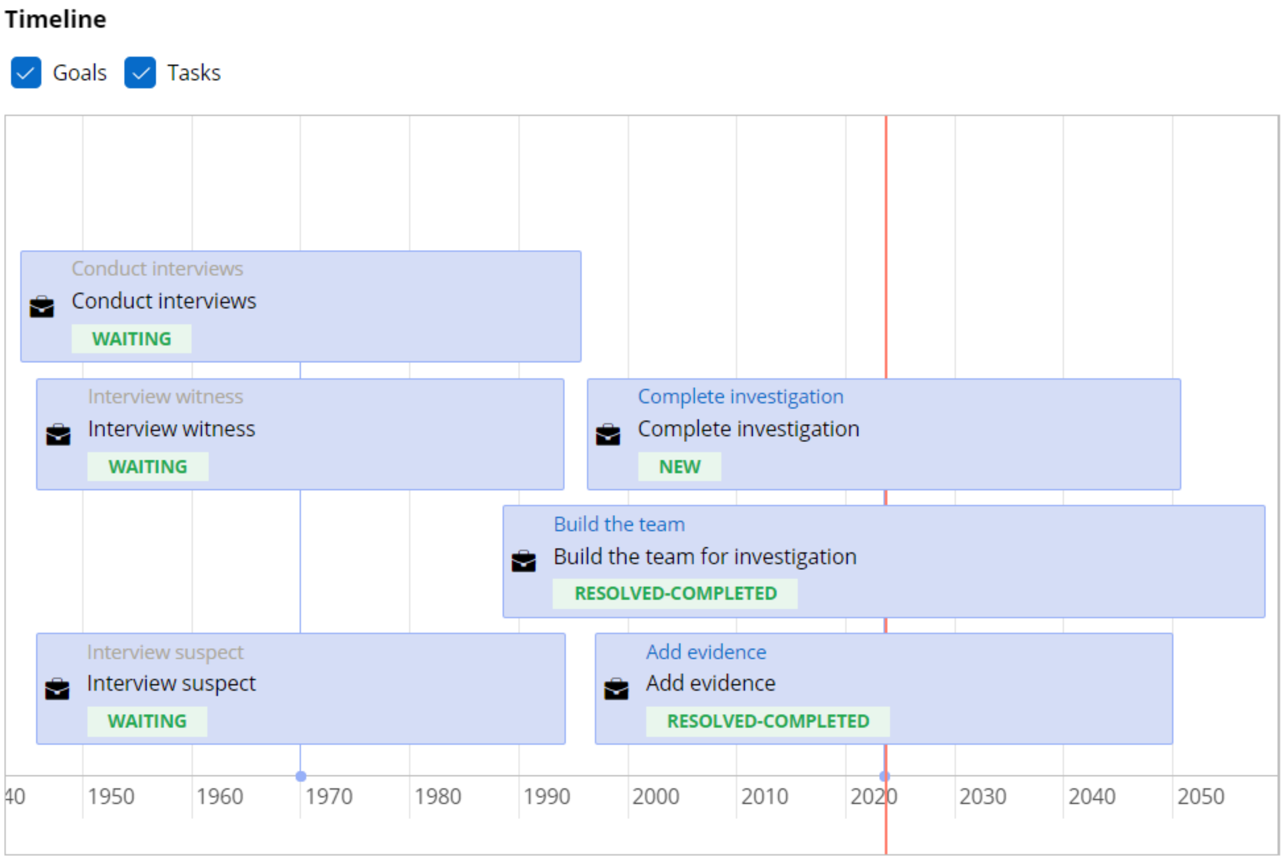


List of activity plans

Timeline for activity plan

For an activity plan, users can view the Timeline view for the plan, goals, and tasks in the Activity plan tab of the case. This view provides information on plan, task and goal creation, completion, and status.

To support the timeline view in Activity plan case and goal case, a new Timeline tab is added to the case.



Timeline

Technical Description

Below are the work classes used to create Activity plan, goal and task cases from Investigation or any other case.

- *PegaPS-Work-ActivityPlan*
- *PegaPS-Work-Goal*
- *PegaPS-Work-Task*

Configurations

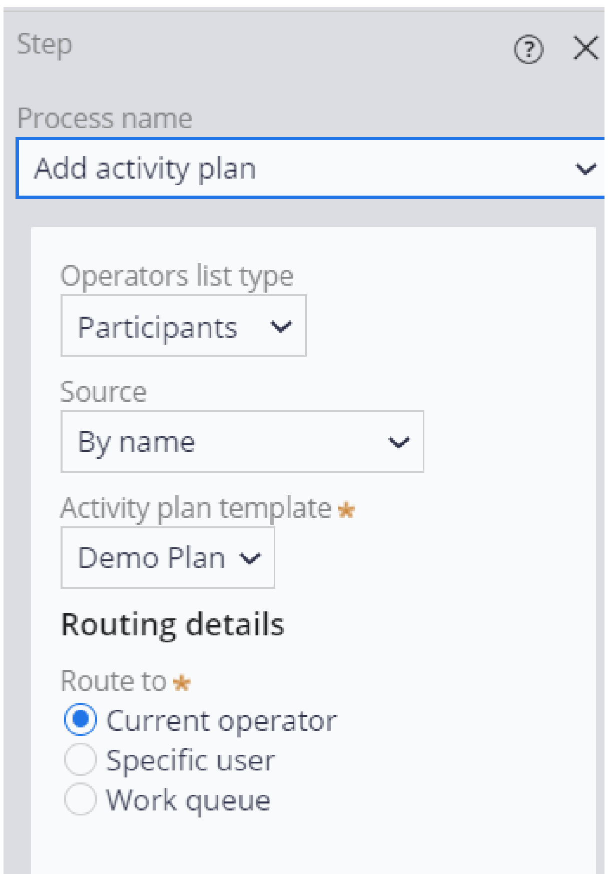
Configuring activity plan in case designer

Create an activity plan component as a step in an investigation case. You can add from the existing activity plan template, create a custom activity plan, and delete or update activity plans for the investigation.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **Step More Processes Add activity plan**.
7. Click the **Select** button.
8. In the add activity plan details section, in the Operators list type, select a type.
    a. When **Participants** is selected, the list of work parties of the case type from where the plan is launched are populated while assigning the goals and tasks.
    b. Alternatively, select **All operators** to show all the available operators in the system while assigning the goals and tasks.
9. In the Source, Select a source.
    a. Select **By Name**, Select existing plans available in the system from the **Activity plan template** dropdown. This option is used to populate the plan details based on the selected plan in dropdown instead of selecting the plan in every run.
    b. Select **By property reference**, Select the property from the autocomplete. This option is used to populate the plan details based on the selected property value. Here property value will refer to the plan name.
    c. Select **By configuration set**. This option is used to populate the plan details based on the configuration set.
10. In the Routing details area, select an operator:

a. To route the assignment to the current operator, click Current operator.
b. To specify a user or operator to whom you want to route this assignment, click Specific user, and then, in the User field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
c. To route the assignment to a specific work queue, click Work queue, and then, in the Queue field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.

11. Click Save.

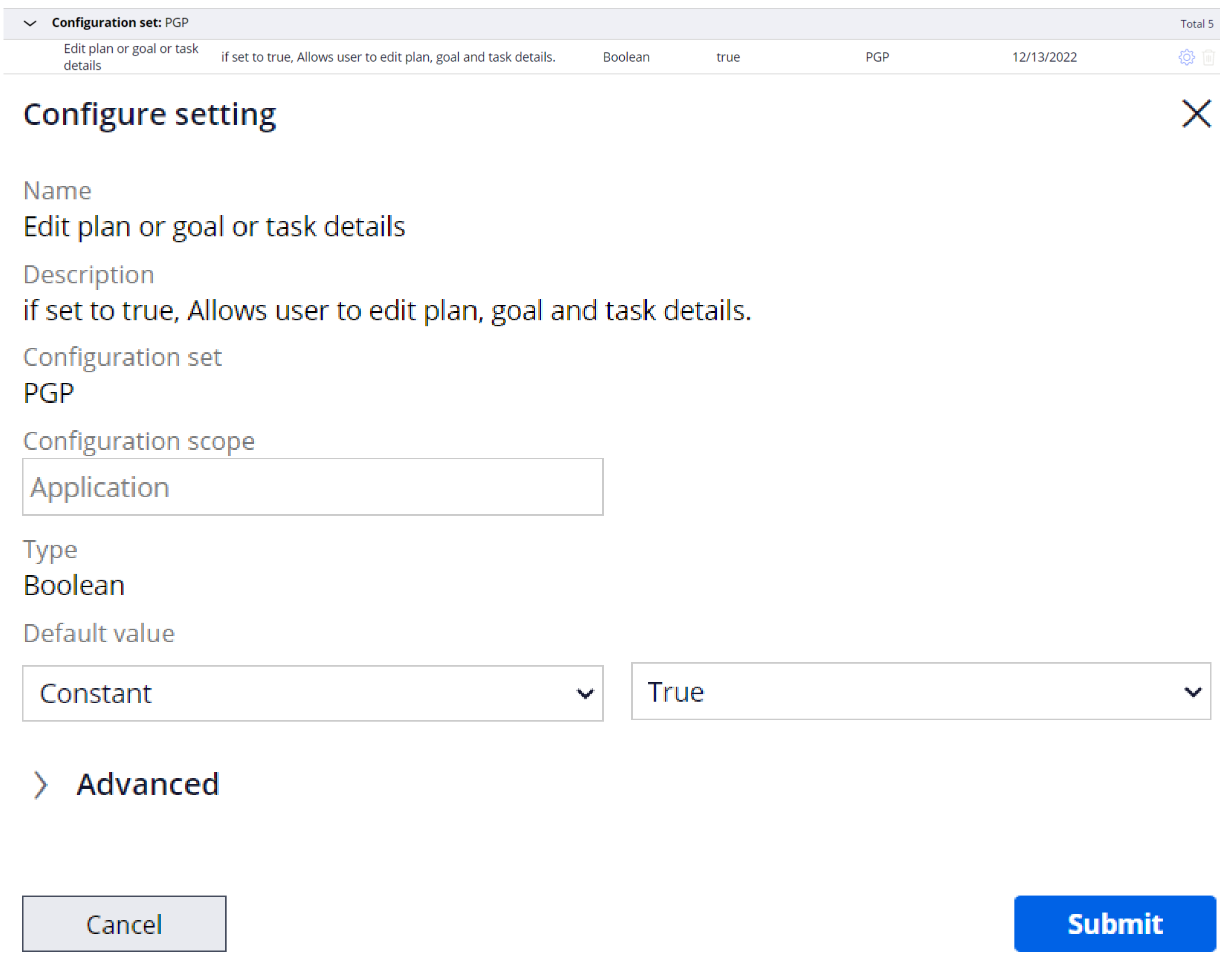


Enabling or disabling Activity plan configurations

You can configure editing a plan description to enable or disable at runtime. Enabling the configuration set will allow the users to edit the descriptions of Plan, goal, and task cases in runtime after the creation. Disabling will not display the Edit button in the case.

To enable/disable the timesheet deadline validation at runtime, follow these steps:

1. On the navigation pane of **App Studio**, click **Settings** > **Configurations**
2. Click **Settings** at the end of the **Edit plan or goal or task details row**.
3. Select constant value as **True** to enable editing and click **Submit**.
4. Select constant value as **False** to disable editing and click **Submit**.



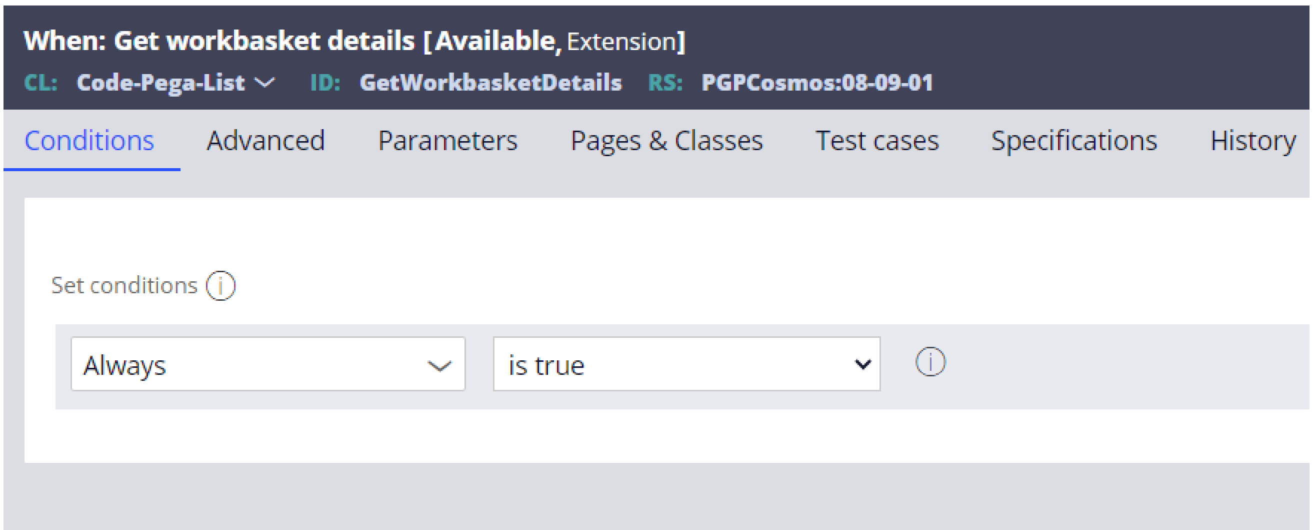
Configure setting

Configuration set

Extensions

Extending work queue assignment for goals and tasks

In the Activity plan case, users can now assign goals and tasks to work queues as well. To enable or disable assigning the goals and tasks to work queues, use the *GetWorkbasketDetails* when rule. This when is marked as extension and by default, this is set to true. To disable the assignment to Work queues, extend this when rule in the implementation layer and set this when rule to false.



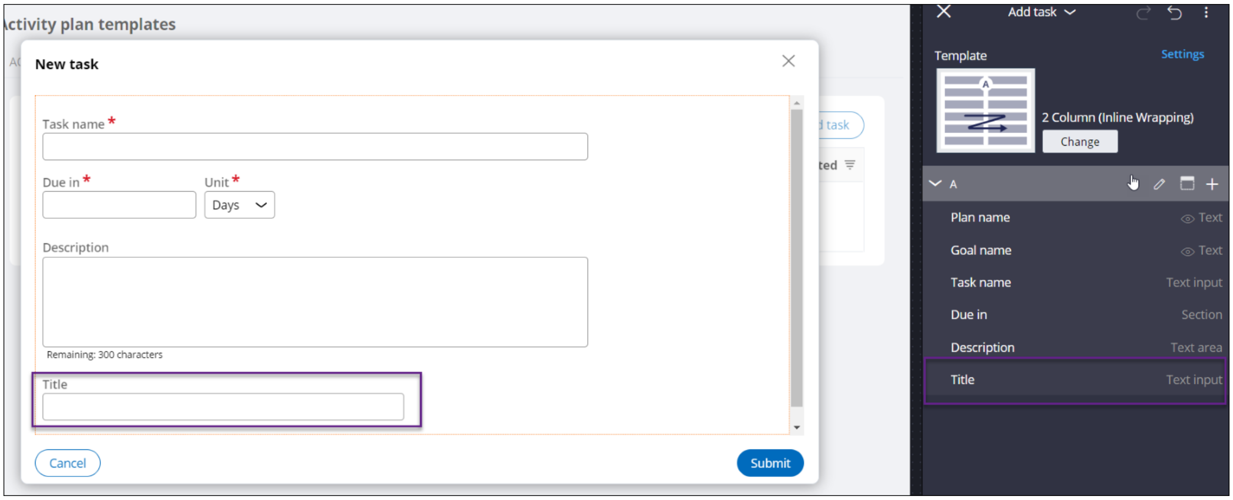
Extending work queue assignments

Extending task details

Create, update, and delete tasks in activity plans. You can add custom tasks and create SLAs in days and hours.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the App Studio navigation pane, click **Data**, and then click the **Task** case type.
4. Click **Add field** to create a field, for example, Title.
5. In the **Tasks** tab of the Activity plan landing page, click the **Add task** button.
6. Navigate to the **Add task** view.

7. Click the **Add** icon and add a new field.

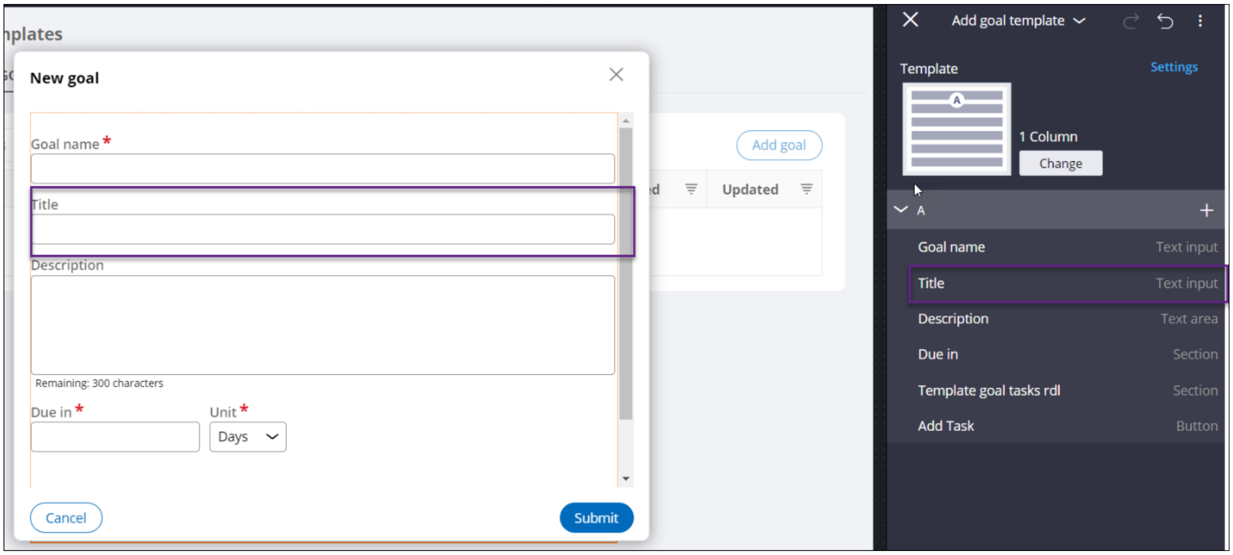


8. Click **Save**.

Extending goal details

Create, update, and delete goals in activity plans. You can add custom tasks, add existing tasks, and create SLAs in days and hours for a goal.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the App Studio navigation pane, click **Data**, and then click the **Goal** case type.
4. Click **Add field** to create a field, for example, Title.
5. In the **Goals** tab of the Activity plan landing page, click the **Add goal** button.
6. Navigate to the **Add goal template** view.
7. Click the **Add** icon and add new field.

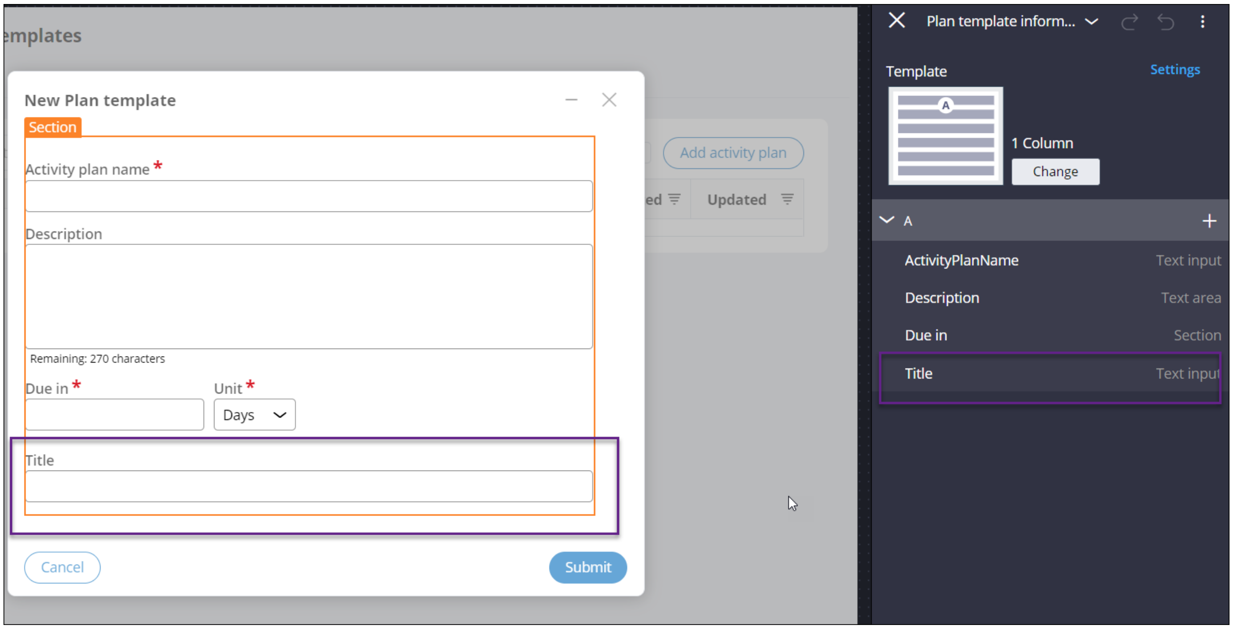


8. Click **Save**.

Extending plan details

Add existing tasks or goals, create custom tasks or goals for the existing activity plans. You can segregate tasks for a goal, and goals for an activity plan so that you can add these plans to an investigation.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the App Studio navigation pane, click **Data**, and then click the **Plan** case type.
4. Click **Add field** to create a field, for example, Title.
5. Click the **Add activity plan** button from the landing page.
6. Navigate to the **Plan template information** view.
7. Click the **Add** icon and add a new field.

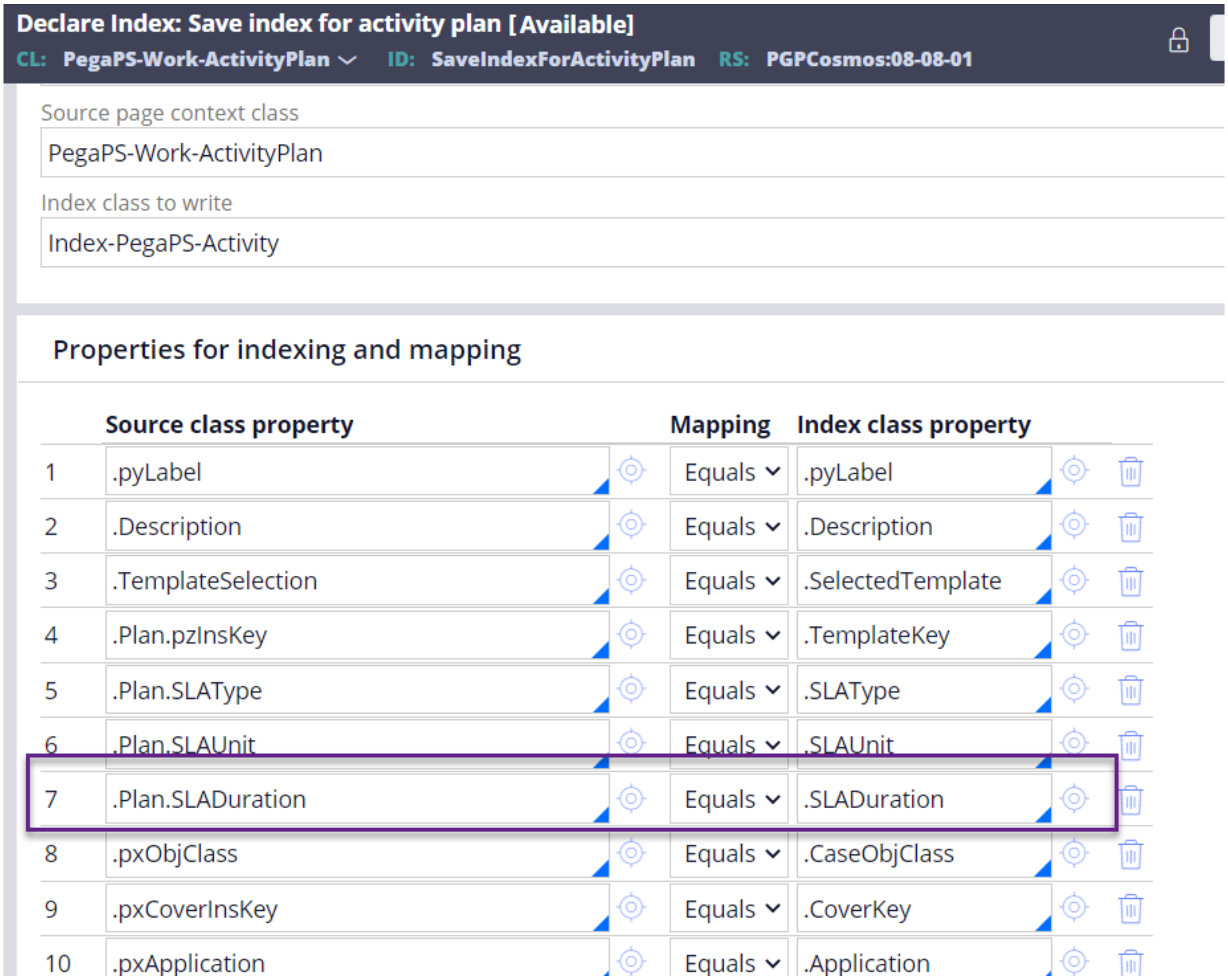


8. Click Save.

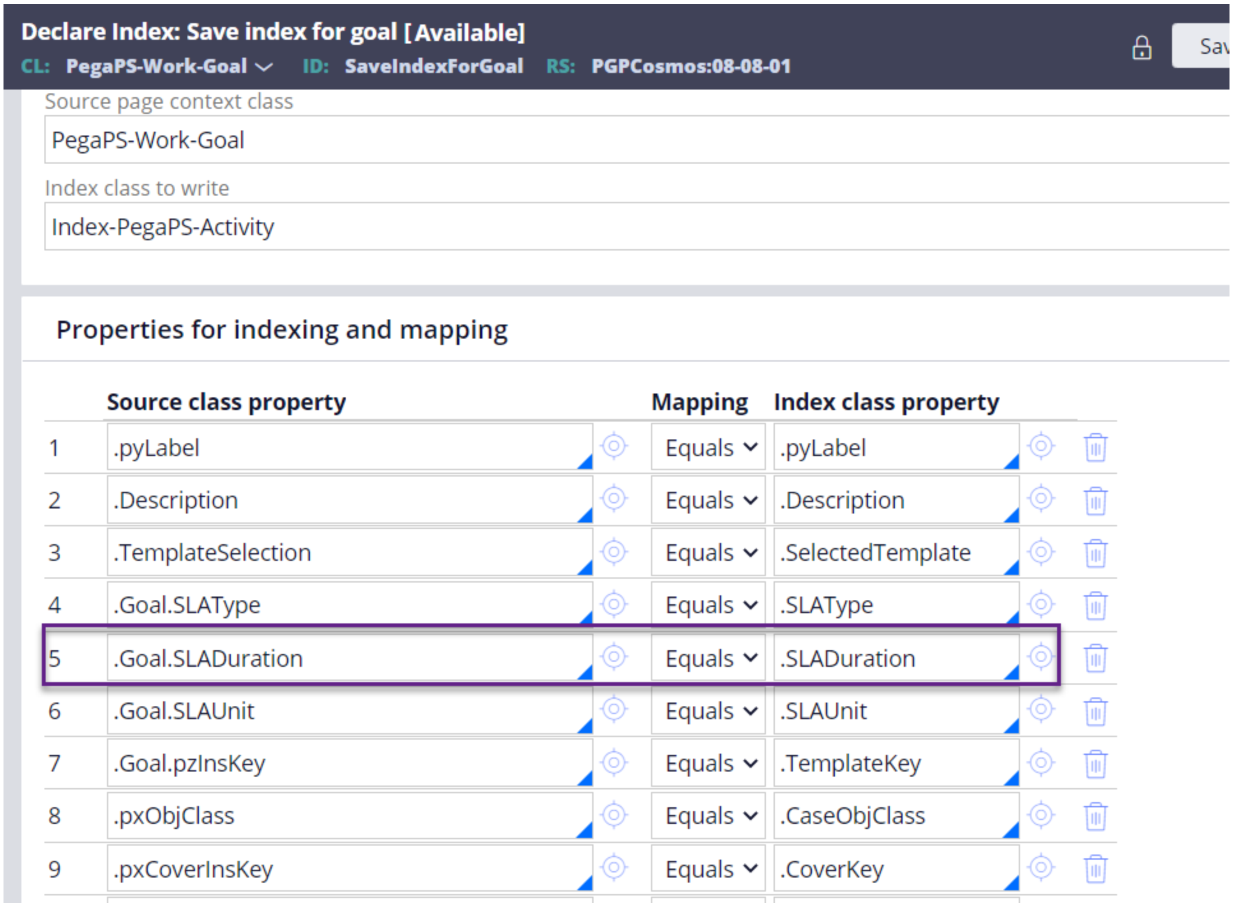
Include an existing template while converting to template

If implementation team has a new template field like SLADuration in their application. While converting custom plan to template, even these new template fields introduced in implementation layer should be populated and persisted in the manage template case. To support this procedure, follow these steps:

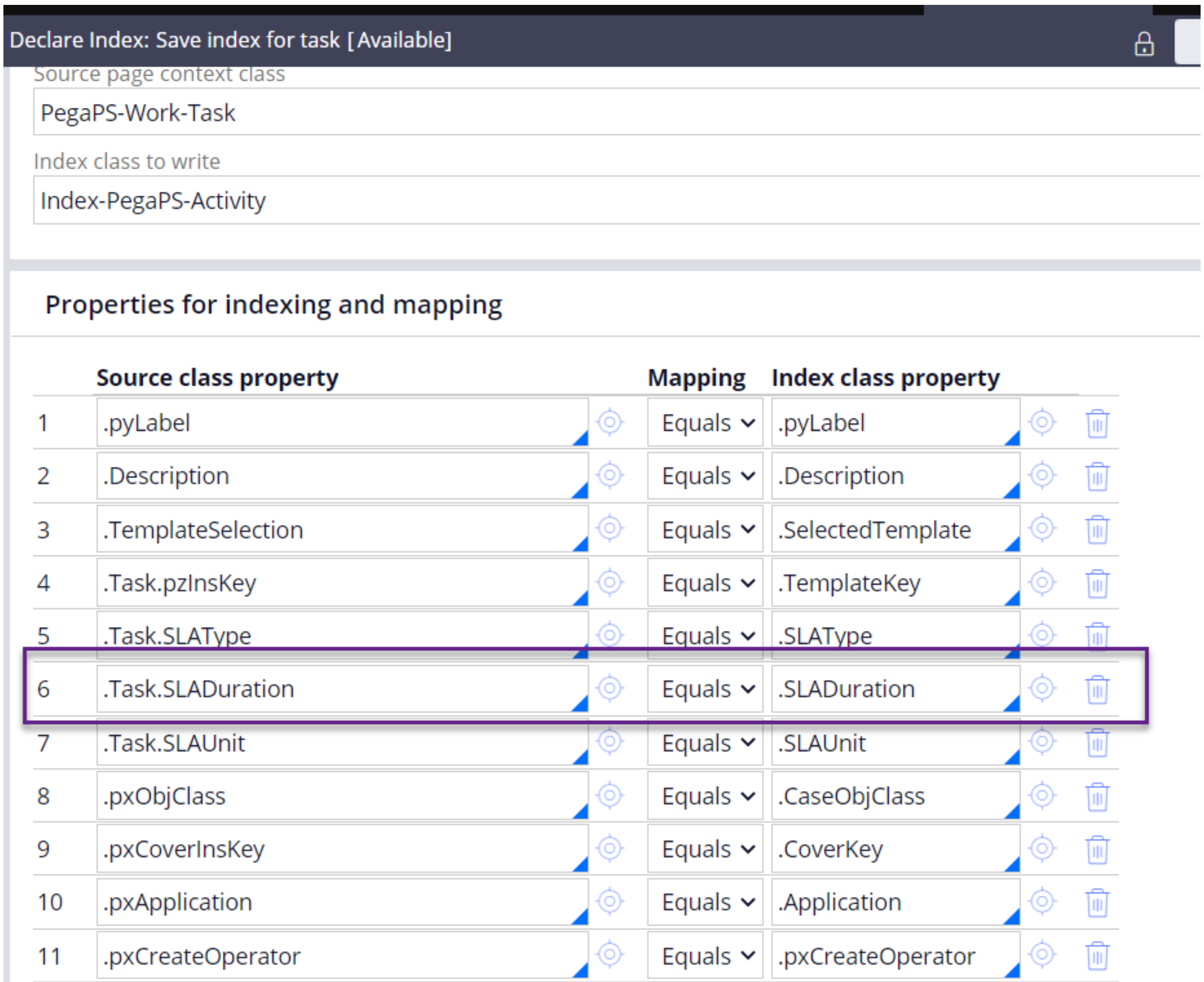
1. Create similar property (for example, SLADuration) in Index-PegaPS-Activity class.
2. Add the property for indexing in declare index rules – SaveIndexForActivityPlan, SaveIndexForGoal, and SaveIndexForTask.



Declare index rule - SaveIndexForActivityPlan

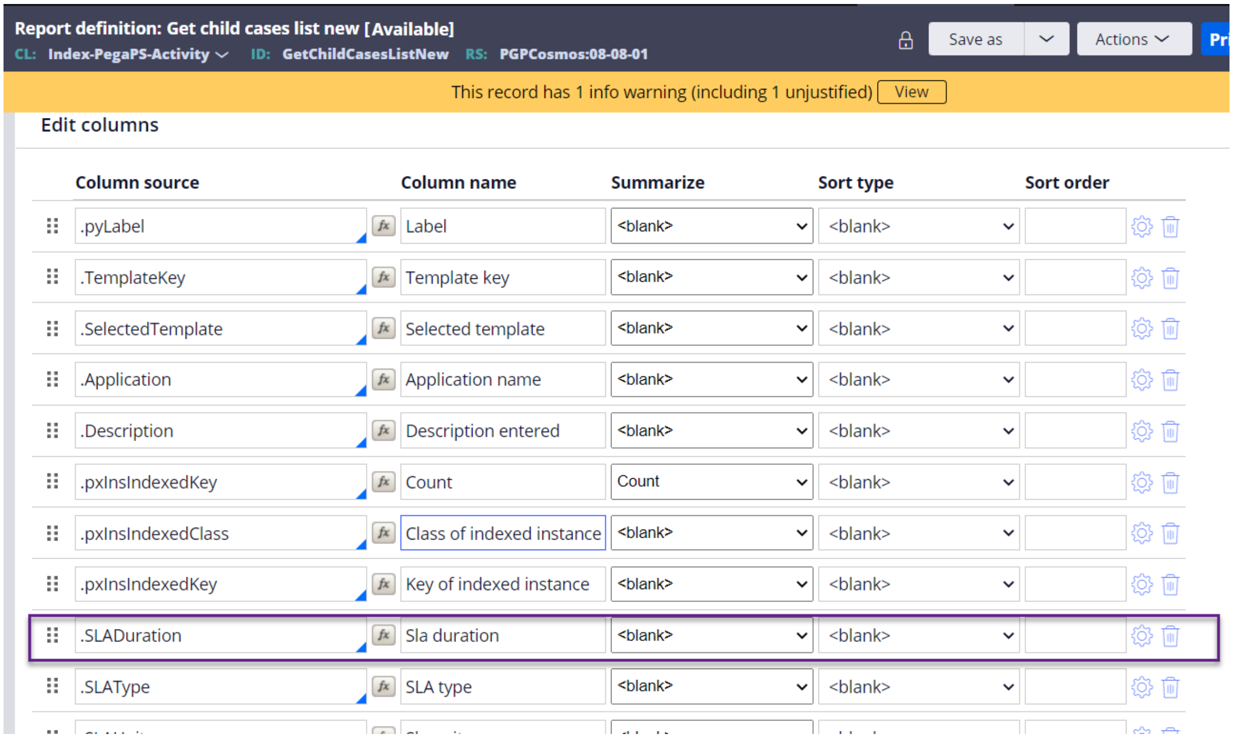


Declare index rule - SaveIndexForGoal



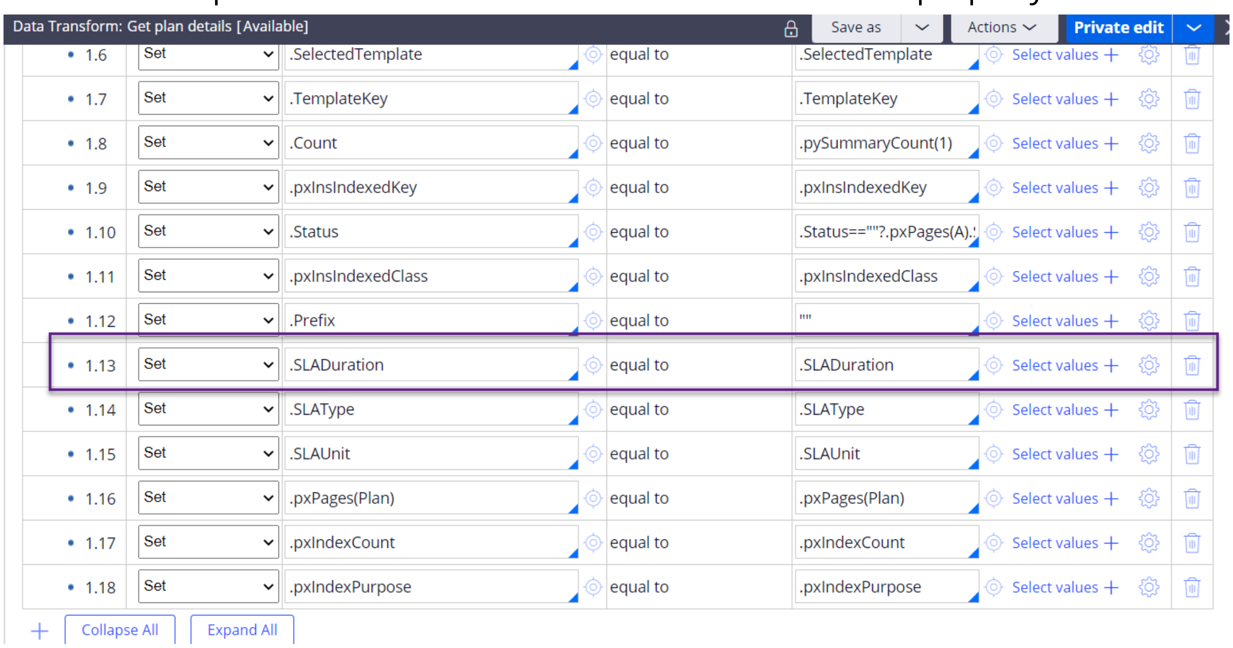
Declare index rule - SaveIndexForTask

3. Update the following report definitions to include the property as a column.
   a. GetChildCasesListNew
   b. GetCustomChildCases
   c. GetKeysUsingTemplate
   d. GetNewPlanDetails



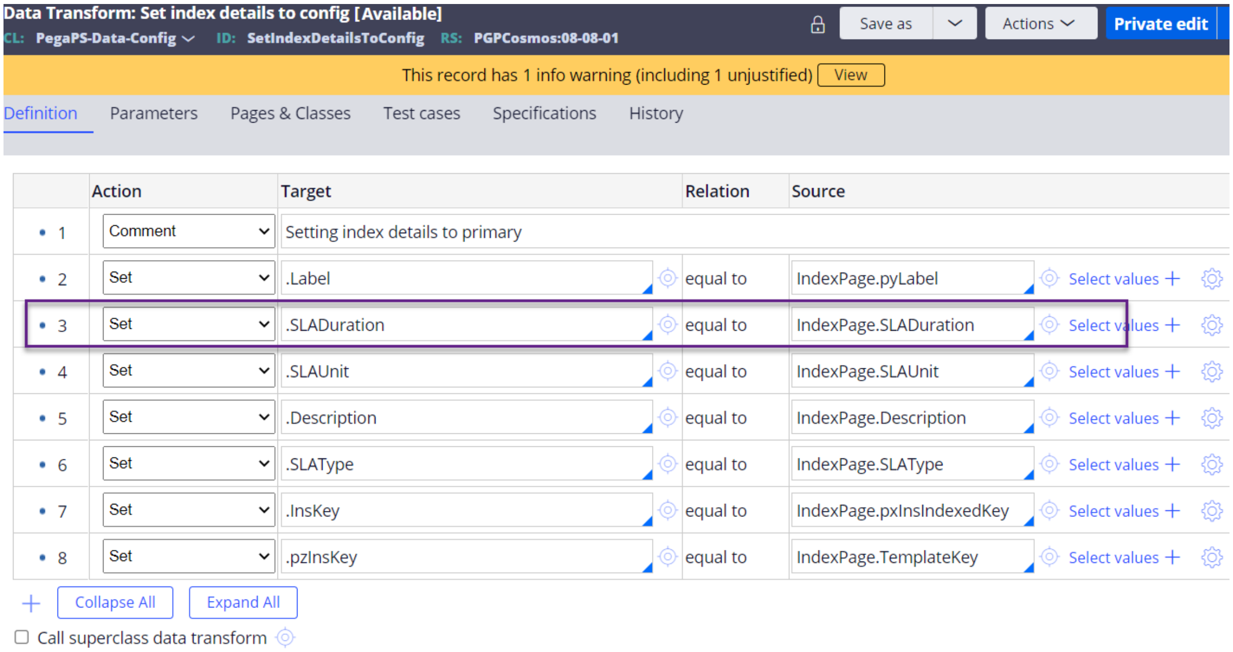
Report definition - GetChildCasesListNew

4. Add a new step in **GetPlanDetails** data transform and set the property.



Data transform - GetPlanDetails

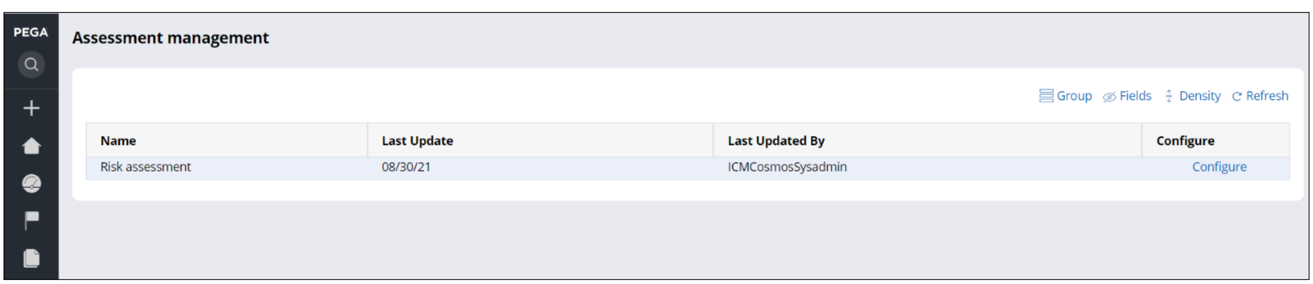
5. Add a new step in **SetIndexDetailsToConfig** data transform and set the property.



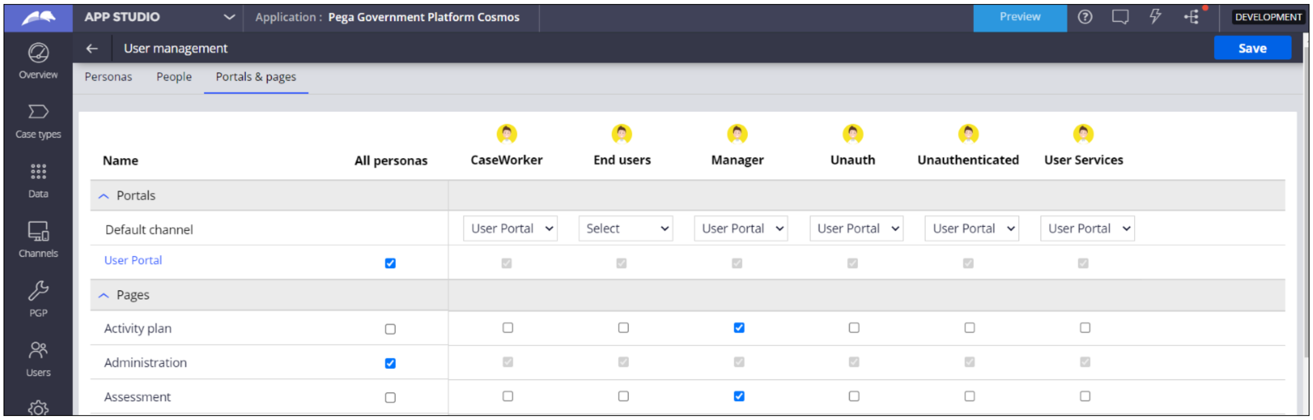
Data transform - setIndexDetailsToConfig

Assessments

The Assessments feature helps you create new assessments, questions, or question pages. Use the Assessments component to configure and conduct assessments.



In Pega Government Platform, access to Assessment landing page is given to a specific access group, for example, the manager access group. To show the Assessment landing page for another access group, update the setting from the **Portals &pages** tab.



For Investigative Case Management, Assessment is added only for the ICM Manager access group.

Summary of features

Configuration of assessment includes providing an SLA name and interpretation with minimum or maximum score range. The following are the typical steps in working with assessments:

1. Configure the assessment for SLA and interpretations.
2. Conduct an assessment from a case, for example, from an investigation case.
3. View the conducted assessments from a case with interpretation score and status.
4. Calculate risk.

In Pega Government Platform, Assessments configuration is done in two ways:

- Assessment configuration from App Studio
- Assessment configuration in runtime case

Configuring assessments from App studio

Use the Assessment process component in a case type as a step in any of the stages. You can create assessments by creating a questionnaire case type from App Studio.

After you add the conduct assessment process as a step, you should select the assessment.

- If you select the assessment by name, then the same assessment initiates every time the process is run.
- If you select the assessment by property reference, you need to send the class name of the assessment that must be initiated.
- If you do not select an assessment in the process configuration, when the process is run, you can select an assessment from the available list.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Conduct assessment**.
7. Click the **Select** button.
8. From configuration panel, select the source of the assessment.

Configuring Assessment in runtime case

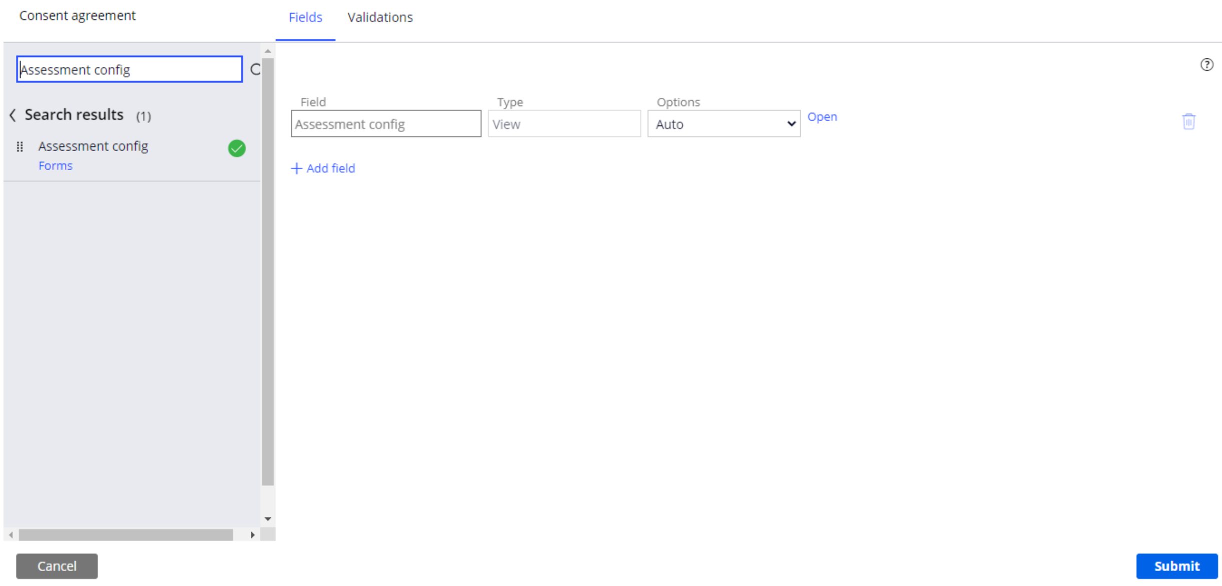
This section component can be used in any case type screen to configure it at runtime. You can select any Assessment that is required to be configured for your case in runtime.

Configuring Assessment config component in case designer

This section component can be used as a step in any case type in one of the stages or as a view.

1. Log in to Pega Government Platform as an administrator.

2. In the header of your workspace, click the **Switch Studio** menu, and then click **App Studio**.
3. In the navigation pane of App Studio, click **Case types**.
4. From the Case types column, click a case type or click **New** to create a new case type.
5. Add the step in the stage and click **Configure view**.
6. In the left pane, search for **Assessment config** and click on + icon .



Assesssment config

Configuring interpretations

Configure SLA and interpretations based on score of the assessment answers. Configure interpretations for the assessment.

Based upon the interpretation results, business users can take further decisions or perform a set of actions.

For example, in a loan application, if the assessment case is configured as: if the score of all the responses is 0-5, and the interpretation is set as low risk. For any score above 5, it is set as high risk.

Based on the interpretation, the approver can understand and decide whether granting the loan amount is risky or not.

1. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
2. Click the **Preview** button, and then click **Config Assessment**.
3. Click **Configure**, and then click **Add interpretation**.
4. In the **SLA Name** list, select the number of days from 1 through 4.
5. In the **Min score** field, enter the minimum score.
6. In the **Max score** field, enter the maximum score.
7. In the **Interpretation** field, enter the interpretation based on the minimum and maximum scores. For example, if the Min score is 0 and the Max score is 3, then the interpretation is Good.

Extending assessments

Extend the assessment feature using Dev Studio.

Adding a field to an assessment configuration

Add a new data field or property and extend an existing assessment.

1. In the navigation pane of , click **Records**.
2. Expand the **SysAdmin** category, and then click **Class**.
3. Click the filter for Class Name.
4. In the **Search Text** field, enter *PegaPS-Data-Config-Assessment* and click **Apply**.
5. Click the rule to open it.
6. Create a property in the *PegaPS-Data-Config-Assessment* class.
7. Include the newly created property in the AssessmentConfiguration (*Rule-PegaQ-Questionnaire*) section.
8. Update the *D_AssessmentConfigurationList* data page report definition to include the newly created property.

Adding a service level agreement (SLA) to an assessment configuration

Add a new SLA type to the existing SLA configurations for any assessment.

1. Create an SLA in the system that refers to OneDay in the *PegaPS-Work* class.
2. In the Explorer panel, click **Data types** > **Option Map**.
3. On the **Records** tab, add a row with the **Field name/Group** set to SLA.

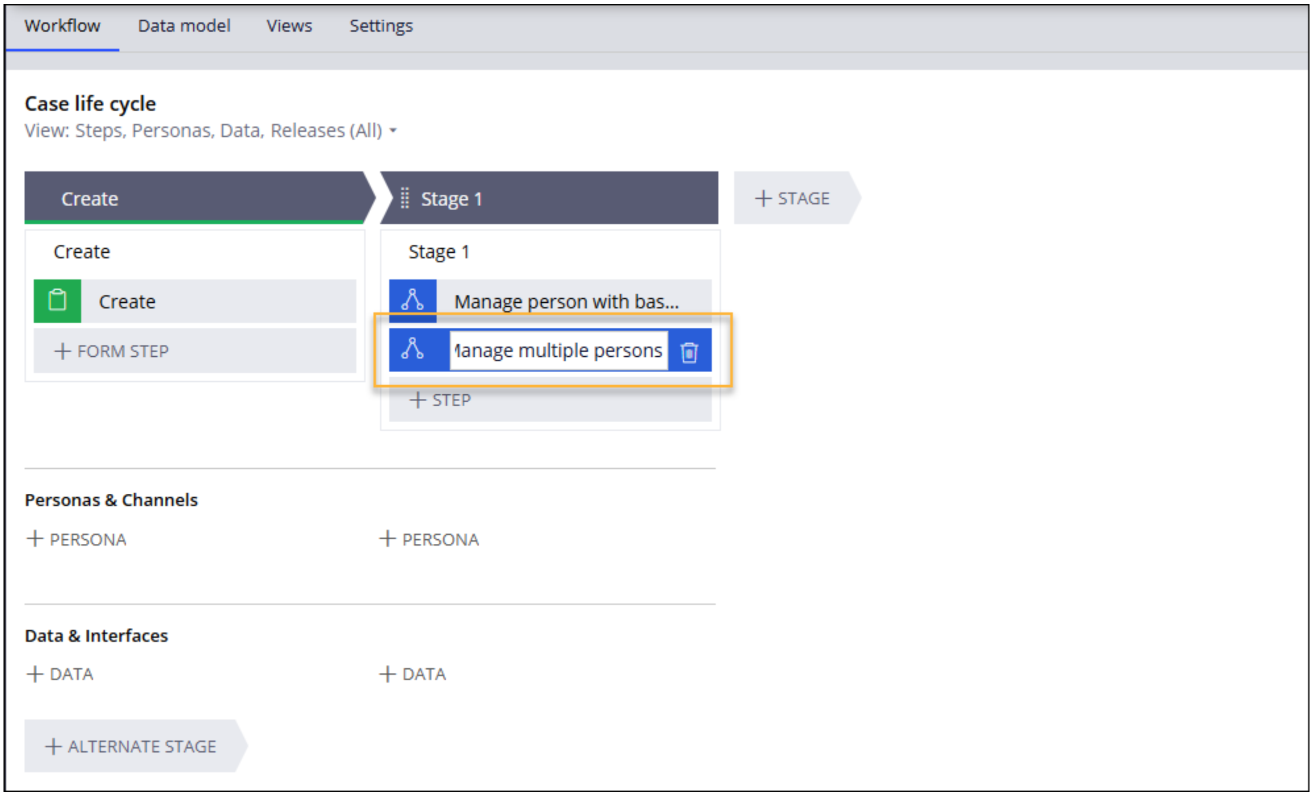
   Ensure that the **Code** column value is the same as the ID of the newly created SLA.

Multiple entity intake

The multiple entity intake feature enables you to capture information about multiple persons in a single step.

For many applications, there is always a need to capture information of all the family members as part of a single step. For each person, you can mention a relationship (for example, parent, child, grand parent, and so on).

While capturing the details of a person, you can either select an existing person in the system or create a new person.



Multiple entity intake components

For multiple persons feature, Pega Government Platform offers components that you can use from App Studio for the following scenarios.

Manage multiple persons (flow)

Use to capture the details of multiple persons: person ID, role, salutation, first name, last name, email, country, and address. This flow also validates the information added. After submission, the person details are persisted to the person table.

Capture multiple persons details (flow action)

Use to capture details of multiple persons: person ID, role, salutation, first name, last name, email, country, and address.

Persist multiple persons (flow)

Use to persist new persons details to person table.

Multiple persons RO (section)

Use to display the list of persons captured.

Implementing multiple entity intake

Add the multiple entity intake component when you build a case type. Many government applications require you to capture details of multiple persons as a part of the intake process, for example, multiple nominees, multiple beneficiaries, and so on.

Configuring and extending multiple entity intake in a single screen

Configure and extend the multiple entity intake feature in a single screen.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Manage multiple persons**.
7. Click the **Select** button.
8. In the **Parameters** section, in the **Label** box, enter a title for the component, for example, Dependent details.
9. In the **Routing details** area, select an operator:
    - To route the assignment to the current operator, click **Current operator**.
    - To specify a user or operator to whom you want to route this assignment, click **Specific user**, and then, in the **User** field, select a user or enter a property in the work class that supplies a specific operator ID at run time.
    - To route the assignment to a specific work queue, click **Work queue**, and then, in the **Queue** field, select a work queue name or enter a property in the work class that supplies a specific work queue at run time.

10. Click **Save**.

Adding new fields to the intake screen

Update the *BasicPersonDetails (PegaPS-Data-Entity-Person)* report definition to add new fields to the intake screen for each person that is captured.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. From the **Case types** column, click **Add person**.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Manage person with basic details.**
7. Click **Save and run**.
8. Click the **Edit form** icon to configure the view.
9. Click the section to which you want to add a field.
10. Click the **Add** icon.
11. Expand **Fields**, and then click the **Add to view** icon.
12. Click **Submit**.

Updating relationship list values

Add new or update the existing values of the relationship list.

1. In the navigation panel of Dev Studio, click **Data types.**
2. Click **Data types** > **Option map**.
3. Click the **Records** tab.
4. Click the filter for the Field name / Group column.
5. In the **Search Text** box, enter `PersonPerson` and then click **Apply**.

   A list of all the possible values for the relationships appears.

6. Click a record to open it, and update it as required.
7. If you want to add a new record, click **Add record**.
8. Click **Save**.

Export Import

Search...

ID	Code	Display value	Display order	Field name / Group	Disable object
PerToPer_A	Parent	Parent	1	PersonPerson	
PerToPer_B	Child	Child	2	PersonPerson	
PerToPer_C	Adopted Child	Adopted Child	3	PersonPerson	
PerToPer_D	Adoptive Parent	Adoptive Parent	4	PersonPerson	
PerToPer_E	Spouse	Spouse	5	PersonPerson	
PerToPer_F	Coworker	Coworker	6	PersonPerson	
PerToPer_G	Roommate	Roommate	7	PersonPerson	
PerToPer_H	Sibling	Sibling	8	PersonPerson	
PerToPer_I	Ex-Spouse	Ex-Spouse	9	PersonPerson	
PerToPer_J	Friend	Friend	10	PersonPerson	
PerToPer_K	Acquaintance	Acquaintance	11	PersonPerson	
PerToPer_L	Grand Parent	Grand Parent	12	PersonPerson	
PerToPer_M	Grand Child	Grand Child	13	PersonPerson	
PerToPer_N	Driver	Driver	14	PersonPerson	
PerToPEr_O	Car Owner	Car Owner	15	PersonPerson	
PerToPer_P	Guardian	Guardian	16	PersonPerson	

+ Add record

Configuring and extending multiple entity intake in separate screens

Configure and extend the multiple entity intake feature in separate screens.

The following are the supported components.

- Manage person with basic details
- Manage person with complete details

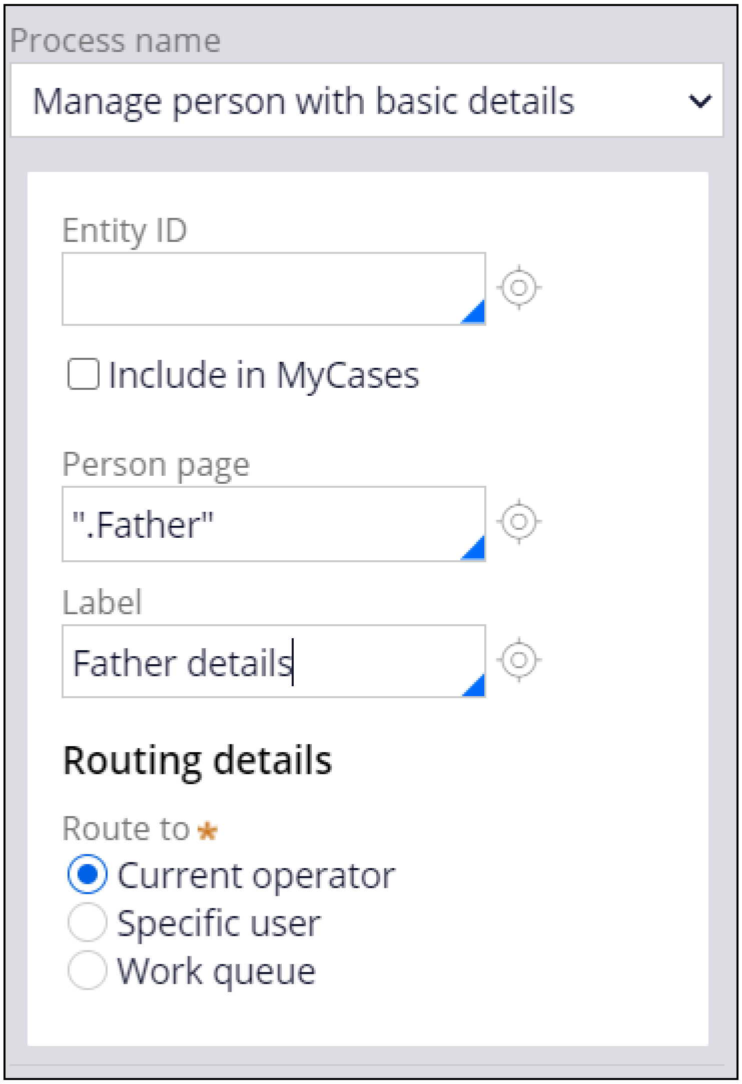
1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.

4. From the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name in the text box.
6. Hover over process, and then click **+STEP** > **More** > **Processes** > **Manage person with basic details.**
7. Click the **Select** button.
8. Click **Save.**

Capturing the details of another person

9. Click the **Data model** tab, and then click the **Add field** button.
10. In the **Field name** field, enter the name for the field, for example, Father.
11. In the **Type** list, select **Embedded data.**
12. In the **Data object** list, select **Person.**
13. Click the **Single record** button, and then click **Submit.**

14. Click the **Workflow** tab and configure the process that you added.



Entity ID

Enter or select the Entity ID of Father if it is available so that the component automatically gets the details from SOR and fills the appropriate fields. If this is left blank, a new entity is created with all the details submitted.

Include in MyCases

Select this if you want to show the current case in MyCases of the entity.

Person Page

Select the property of the Person type into which you must capture the details of the father and add quotes at both ends, for example, ".Father". The details are captured into the Father property.

Label

Provide an instruction to the user, for example, Enter father details.

Extending multiple entity intake in separate screens

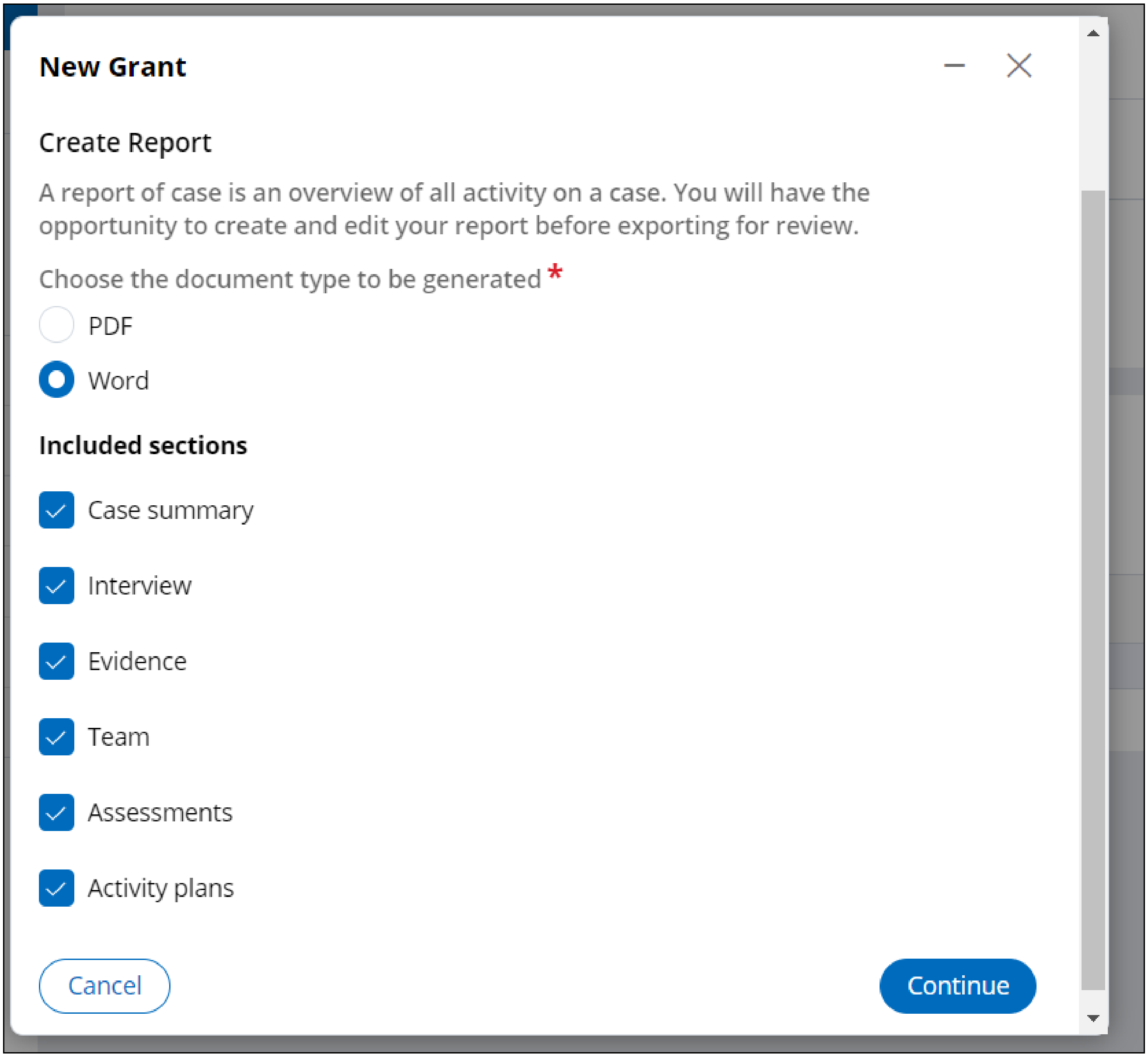
To add new fields to the screens, update *BasicPersonInfo or PersonDetails (PegaPS-Data-Entity-Person)* based on the component used.

For more information on adding new fields to screens, refer to Adding new fields to the intake screen.

Case report

Case report is a reusable and generic component for a process. Using case report, a manager or reviewer can consolidate data from a case and can generate a Microsoft Word or PDF document.

You can add *create report* as a component from App Studio, and can generate a granular level report from case data. Pega Government Platform supports generating the details of case summary, interview, evidence, team members, assessments, and activity plans that are related to the case type. In addition to the above, the ICM application supports *subjects and external organizations* as well.

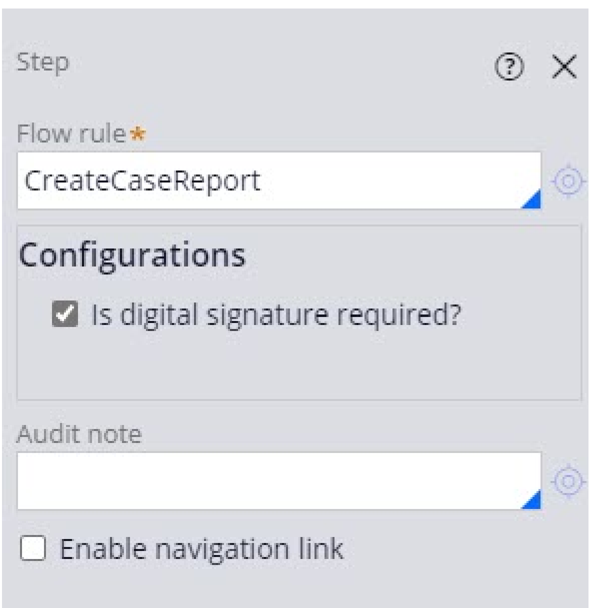


Configuring case report in case designer

Configure the case report component in App Studio to use in a case type, as a step or an optional process, in a stage. You can use the case report component in case types that capture data related to interviews conducted, evidence, activity plans, and so on.

1. Log in to Pega Government Platform as an administrator.

2. In the header of your workspace, click the **Switch Studio** menu, and then click App Studio.
3. In the navigation pane of App Studio, click **Case types**.
4. In the **Case types** column, click a case type, or click the **New** button to create a new case type.
5. In the **Case life cycle** section, click **Stage**, and then enter a name for the stage in the text box.
6. Hover over Process, and then click **STEP** > **More** > **Processes** > **Create case report.**
7. Click the **Select** button.
8. Under **Configurations**, click the checkbox "Is digital signature required?," to capture the digital signature.



Configure case report

9. Click **Save** to save the changes.

Adding new data to the generated report

Create a case report with case details attached to the case type. The case report component is useful if the case type captures data related to interviews conducted, evidence, activity plans, and so on.

1. In the Dev Studio Explorer panel, click **App**.
2. Click the **Classes** tab, and in the **Search** box, enter `PegaPS-Work`.
3. Click **Data Model** > **Data Transform** > **PreDocumentGeneration**.

> **Note:** If you are unable to view the **PreDocumentGeneration** data transform, click **Show all results**.

4. Click the data transform to open it.
5. Click the **Save as** button to save the data transform to the required class.
6. In the **Data Transform Record Configuration** section, in the **Label** box, enter a title.
7. In the **Context** section, select an application.
8. In the **Apply to** area, enter or select the required class.
9. In the **Add to ruleset** area, select a ruleset and the ruleset version.
10. In the **Current work item** section,enter or select a work item to associate.
11. Click the **Create and open** button.
12. Click the **Add a row** icon to add a new data transform to which you want to add data.
13. In the newly added data transform, in the **Target** box, enter or select the `.DocumentationReport`property.
14. In the **Source** box, append the required content in HTML format.
15. Click **Save**.

Adding a new selection item to the report contents for list objects

Add a new case type component to the case report. During the document creation, the case type component and its details appear.

1. In the Dev Studio Explorer panel, click **App**.
2. Click the **Classes** tab, and in the **Search** box, enter `PegaPS-Work`.
3. Click **User Interface** > **Section** > **Contents**.
4. Click the **Save as** button.
5. In the **Data Transform Record Configuration** section, in the **Label** box, enter a title.
6. In the **Context** section, select an application.
7. In the **Apply to** area, enter or select a class.
8. In the **Add to ruleset** area, select a ruleset and the ruleset version.
9. In the **Current work item** section,enter or select a work item to associate.
10. Click the **Create and open** button.
11. Click the **Add** icon, and then click **Pickers** > **Checkbox**.
12. Double-click the newly added check box.
13. In the **Cell Properties** dialog box, enter the required details and then click **Submit**.
14. Update the *ShowItemsSelection (PegaPS-Work)* When condition with the new property created above.
15. Create a property in the *PegaPS-Work* class to hold the list of items for the user to select.
16. Update the *PreSelectItems (PegaPS-Work)* data transform to set the details to list property.
17. Update the *SelectItems (PegaPS-Work)* section to show the list of details for the user to select.
18. Follow the steps mentioned in the Adding new data to the generated report section, to include the selected items in the generated report.

Using a Microsoft Word template

Create a new Word template while downloading the case report with details. The Word template helps in capturing key information and in maintaining consistency of the information.

1. Click **Create** > **SysAdmin** > **WordTemplate**.
2. In the **Word Template Record Configuration** section, in the **Label** box, enter a title.
3. In the **Context** section, select an application.
4. In the **Apply to** area, enter or select a class.
5. In the **Add to ruleset** area, select a ruleset and the ruleset version.
6. In the **Current work item** section,enter or select a work item to associate.
7. Click the **Create and open** button.
8. In the **Template** section, click **Upload file** to upload the required Word template, and then click **Save**.
9. In the Dev Studio Explorer panel, click **App**.
10. Click the **Classes** tab, and in the **Search** box, enter `PegaPS-Work`.
11. Click **Process** > **Flow Action** > **Preview**.
12. Click **Save as** to save the flow action into the case where you need a new template.
13. In the **Flow Action Record Configuration** section, in the **Label** box, enter a title.
14. In the **Context** section, select an application.
15. In the **Apply to** area, enter or select a class.
16. In the **Add to ruleset** area, select a ruleset and the ruleset version.
17. In the **Current work item** section,enter or select a work item to associate.
18. Click the **Create and open** button.
19. Click the **Action** tab.
20. In the **Apply data transform** box, enter or select `PostPreview`.
21. In the **Post-processing** section, in the **Parameters** area, enter the new template name and the class.
22. Click **Save**.

Changing the PDF file styling

Change the styles in PDF document. The <style> tag defines the style information (CSS), where you mention how case details render in the PDF document.

When you generate a case report in the PDF file format, the *DocumentationReport* property which holds the complete markup stream of the PDF document, is passed as a parameter to the *GenerateCaseReportDocuments* activity through which the PDF document is generated.

The following is the styling CSS for PDF document in PGP and is set in step 4 of the *PostPreview (CL:PegaPS-Work)* data transform.

```
"<style> th{ align:justify; text-align: left; vertical-align: top; border-bottom: 1px solid black; } table{ border-collapse:collapse; } th,td{ padding:2px; font-size: 9pt; } td{ border-bottom: 1px dotted #000; font-weight:regular; text-align:top; vertical-align:top; } </style>"
```

1. Save the *PostPreview (CL:PegaPS-Work) data transform* to the implementation layer.
2. Update the new styling for the PDF document in step 4.

Programs

As an agency, manage your licensing and certification processes by interacting with constituents and corporate entities. The program configurator omni-channel tool helps you meet customer needs more effectively and efficiently.

In program configurator, you can configure a new license by providing the required data for the license along with the image. The program configurator includes license configuration, a comprehensive application that streamlines licensing and certification application process from start to finish, including evaluation, document upload, and verification.

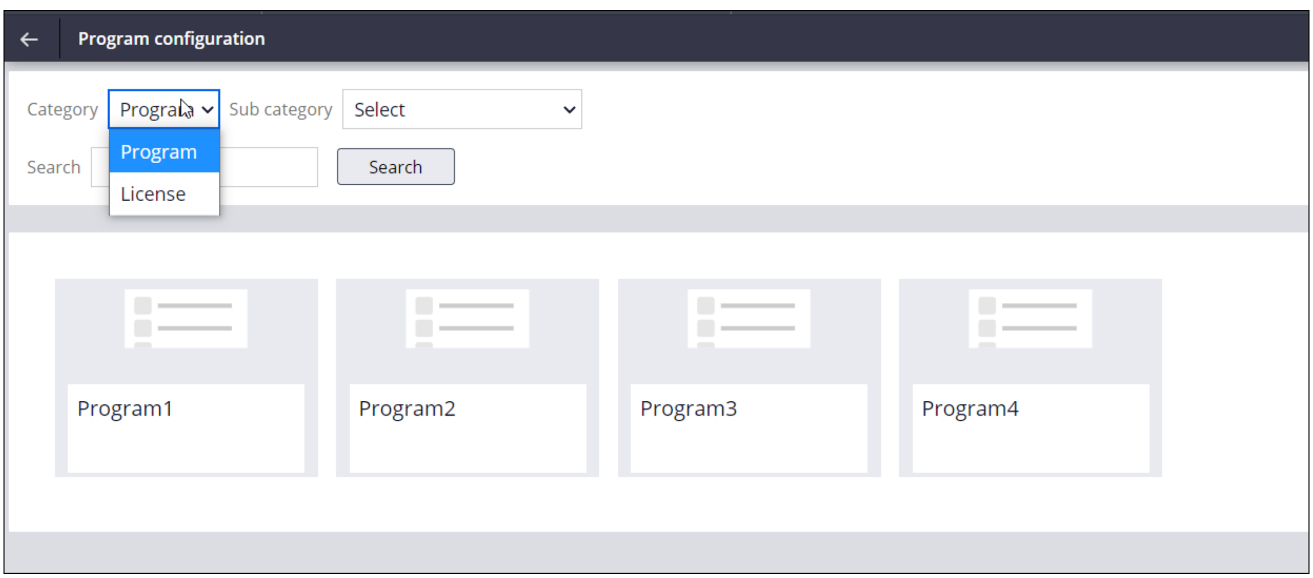
The program configurator enables you to do the following:

- Provide seamless, and simple licensing and certification processes for constituents, businesses, facilities, and vehicles.
- Reduce processing steps and minimize touch points to provide straight-through processing.
- Provide a modern government platform to meet future requirements and enable policy changes by business users.
- Reduce project implementation time and accelerate project delivery.
- Improve communication and interaction with constituents and businesses through omni-channel interactions.

Program configuration

Government organization offers its citizens different services, different set of service details need to be created in the application. To achieve different set of details for different services, you can use this component and configure it accordingly.

The program configuration landing page can be accessed from app studio and supports configuring programs and licenses.



Program definition

Program definition case type helps in defining and managing the programs for government purposes and customize them as required. This case type provides end-to-end capabilities of Program management and configuration that enable agencies to increase efficiency.

If a government agency wants to create a new program or license, they can quickly create a Program definition case to define the program or license with the data model that comes with the case.

This feature can be used for defining and managing programs and licenses for various entities available in PGP such as person, business, item, vehicle, facility.

Using Program Definition case type, you can add a new case to create a program or license with a specific manager access. This features offers the following capabilities:

- Define new program
- Edit program
- Copy program
- Searching for a program

Program definition case life cycle

Define new program

You can create the program or license from **User portal** > **left navigation menu** > **Create**.

While defining the program, you must provide the following details:

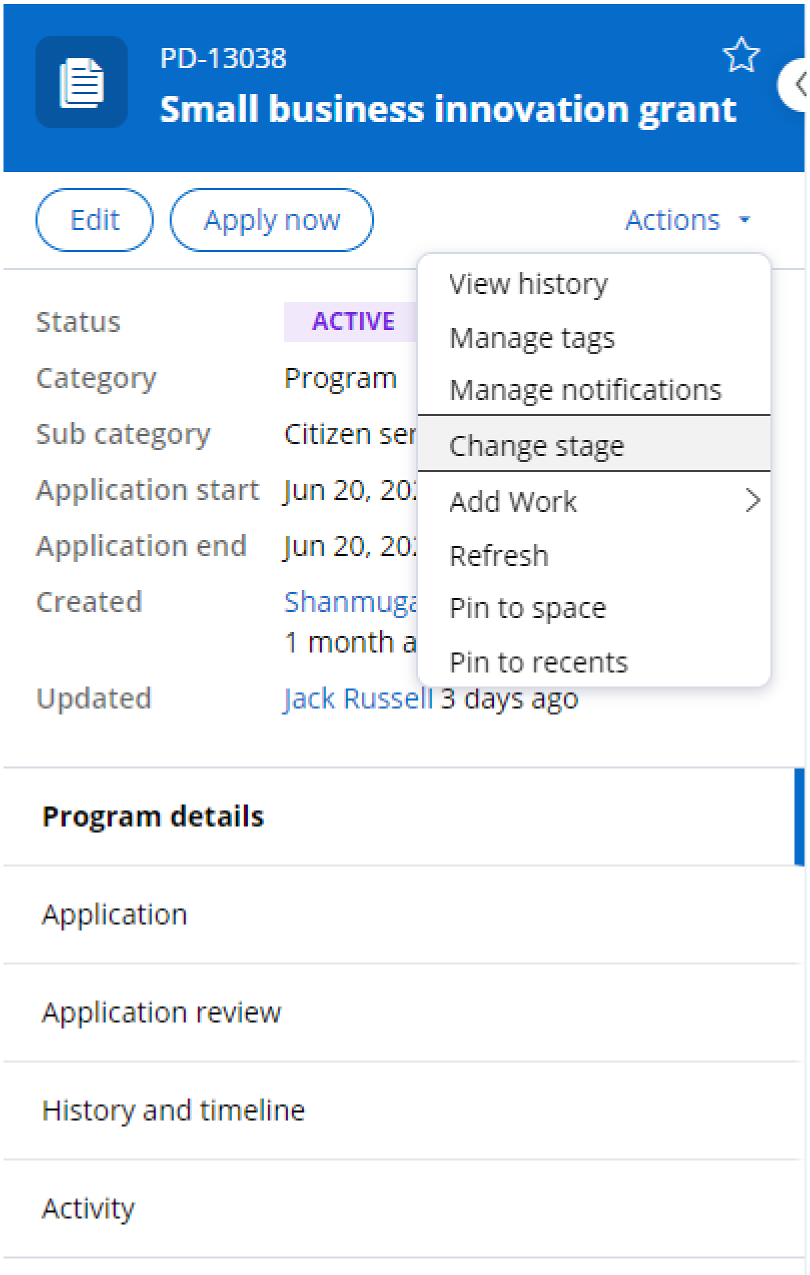
- Name
- Category
- Sub-category
- Unique identifier of the program
- Enter program details such as
    - Entity applicable
    - Start date

- End date
- Fund details
- Configurations
  - Document
  - Evalutation
  - Checklist

Approval process

Upon entering the details, the case type will go through an approval process before saving the program to the system. Once approved, the status of the program is active. If the reviewer rejects the program, the case is resolved with the status **Resolved rejected** else the program is saved to the system and the status is changed to **active**.

You can search or view a program or license from Program definition landing page. You can narrow your search to the applicable entity with the entity type list.



Program definition actions

You can perform the following actions on an active program screen:

- Copy Program– This feature allows you to copy the program details (except name and unique identifier) and create a new program definition case. You can edit the program details of the new program definition case as you go through the flow.

- **Edit/Update Program** – This feature allows you to edit the program details which goes through an approval process before saving the changes. If the reviewer rejects the changes, the program is routed back to the user to edit the details. If accepted, the changes are saved to the system.

- **Apply now** – This feature allows you to initiate or launch the application request case with the program details.

Technical description

While creating the case, based on the selected category (Program/License) the configurations are persisted in the respective data types.

The following data classes are used for the selected category.

- Program: *PegaPs-Data-Config-Program*
- License: *PegaPs-Data-Config-Program-License*

Below is the work class used to create the program definition work object for both Program and License

PegaPS-Work-Manage-Program

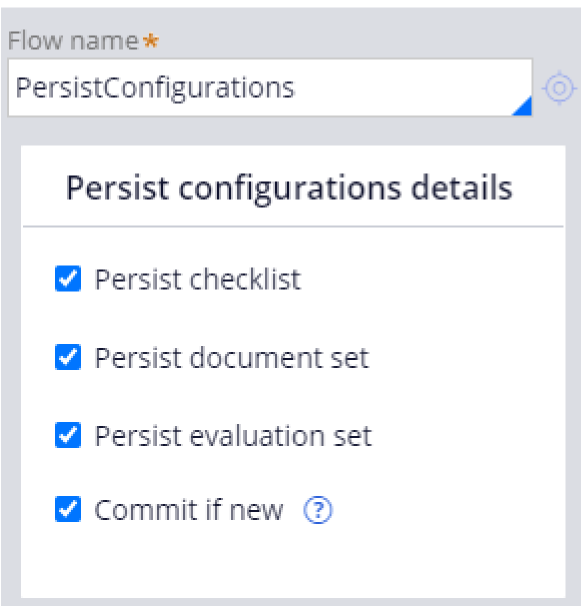
Program definition case is accessible only to supervisors/managers. Case workers cannot define or manage programs. Supervisors and managers have capabilities to define, update, and manage the programs and license configurations. Case workers cannot define or manage programs. This is achieved using RBAC feature.

Configurations

Pega government platform comes with a reusable section components that can be used in program definition case type for the configuration of Documents, Checklists, Evaluations, and so on. These section components can be used in any case type where there is a need for configuration of these items. A flow component Persist configuration is used to persist these configurations into the system.

Using these components, the user who is defining the program can configure the required documents, checklists, evaluation and so on. These section components are built in such a way that, user can select existing documents from the list of documents available, or create a new document set as per the requirement. This same functionality is applicable for checklists and evaluation configuration as well. Once a new document is created, it would be persisted into the system using Persist configurations flow component.

Persist configurations component persists all the configurations into the system. This component comes with parameters to commit the configurations. These parameters can be set as per the requirement. For example, if there is a need to use and persist only a few configurations in the implementation, the required parameters can be enabled and others can be disabled by unchecking the checkbox for the respective configuration parameter.



Persist configurations

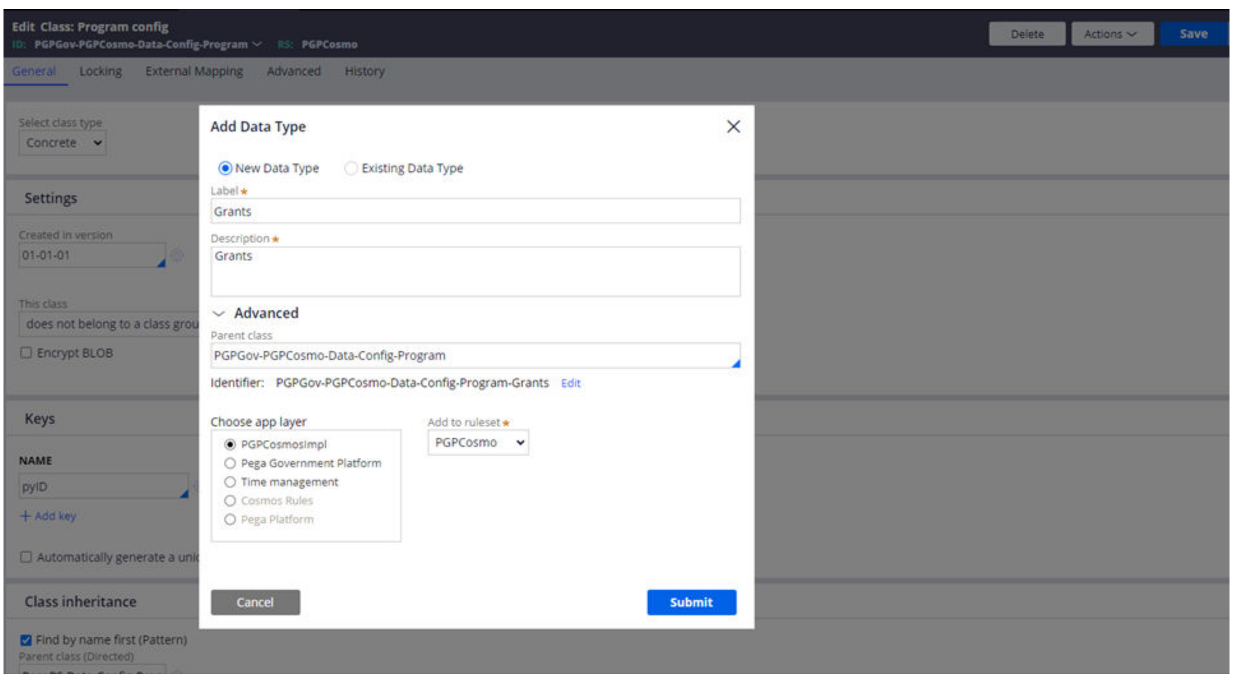
Adding a new program configuration and creating a new program case

Implementation layer classes:

- PGPGov-PGPCosmo-Data-Config-Program
- PGPGov-PGPCosmo-Data-Config-Program-Grants

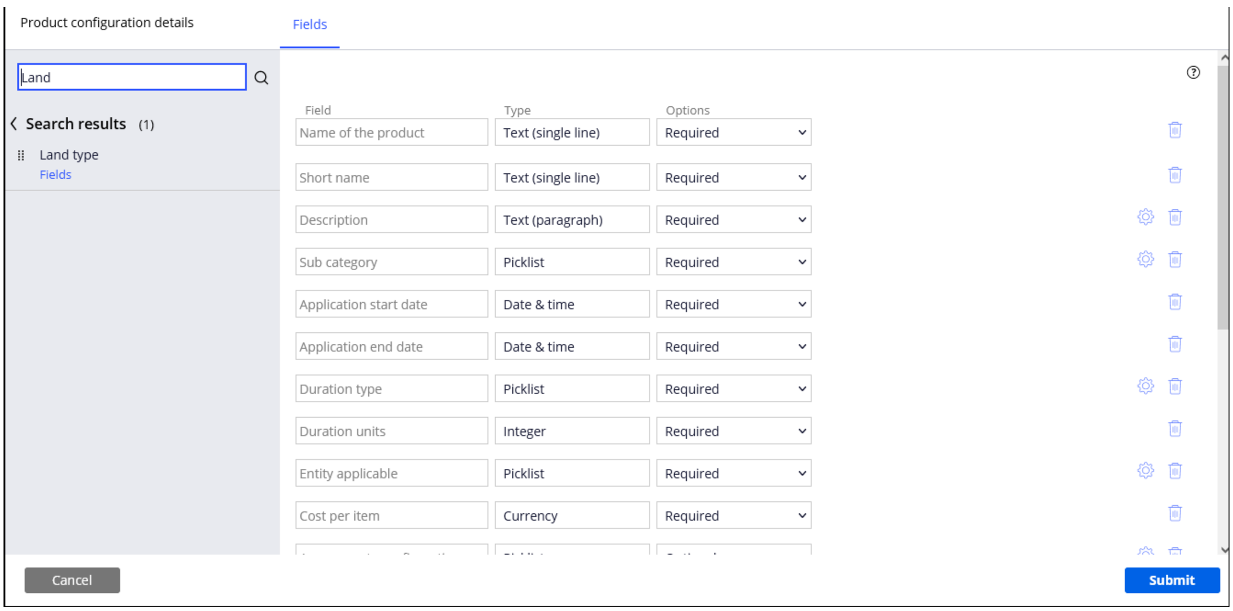
- PGPGov-PGPCosmo-Data-Program
- PGPGov-PGPCosmo-Data-Program-Grants
- PGPGov-PGPCosmo-Work-Program
- PGPGov-PGPCosmo-Work-Program-Grants

1. In the header of , click **Data types**.
2. Click **Options** > **Add data type**.
3. In the **Label** box, enter a name, for example, Grants.
4. Expand the **Advanced** section and in the **Parent class** box, enter or select the *PegaPS-Data-Config-Program* class, and then click **Submit**.



5. On the **Records** tab, click the **Configure source** button.
6. Select the **Use as key** check box for the **pyID** identifier.
7. Delete **EntityID** and **EntityType** columns.
8. In the **Database** box, enter or select **PegaDATA**.
9. Click **Submit**, and then click **Close**.

10. On the **Data model** tab, click the **Add field** button to add the new program configuration specific fields, for example, Land type.
11. Click **Submit**.
12. On the **View** tab, click the **Program configuration details** tile.
13. Click the **Delete** icon to delete any fields that are not applicable to the new program configuration.
14. Search for the fields that you have added in step 9, click the **Add to view** icon to add them to the view, and then click on **Submit**.



15. Click **Save** to save the Grants data type.
16. In the header of Dev Studio, click **Data types**, and then click **Option map**.
17. On the **Records** tab, filter the **Field name / Group** column by typing `ProgramCategory` in the **Search Text** box.
18. Add the new program.

ID	Code	Display value	Display order	Field name / Group	Disable object
ProgramType_A	Program	Program	1	ProgramCategory	
ProgramType_B	License	License	2	ProgramCategory	
ProgramType_C	Grants	Grants	3	ProgramCategory	

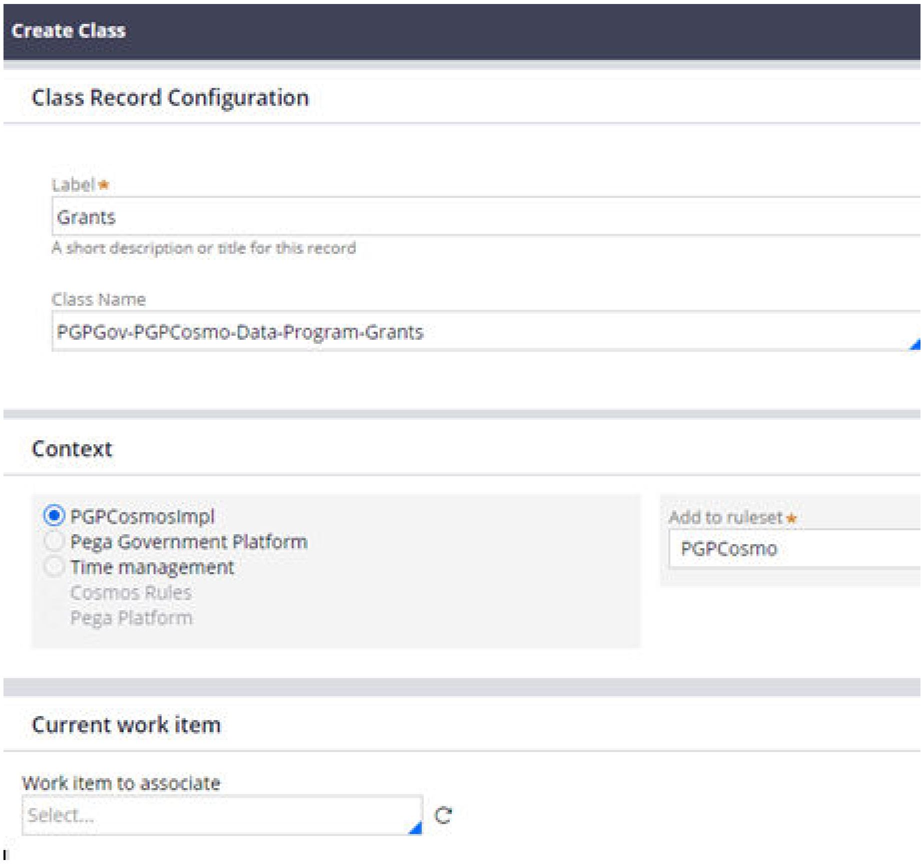
+ Add record

19. Add new program sub categories. For subcategories, you must add the Field name column value that you added in step 18 as the Code column value.

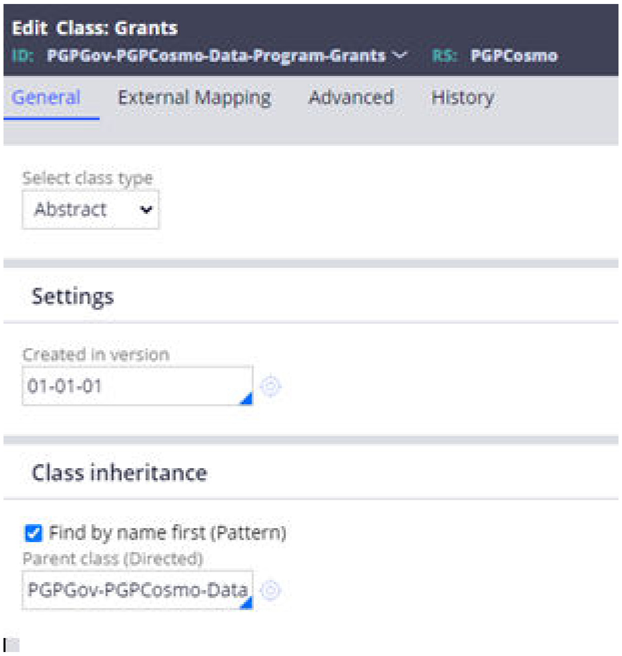
ID	Code	Display value	Display order	Field name / Group	Disable object
ProgramType_A	Program	Program	1	ProgramCategory	
ProgramType_B	License	License	2	ProgramCategory	
ProgramType_C	Grants	Grants	3	ProgramCategory	
GrantsCatergory_A	Industrial	Industrial	1	Grants	
GrantsCatergory_B	Commercial	Commercial	2	Grants	

+ Add record

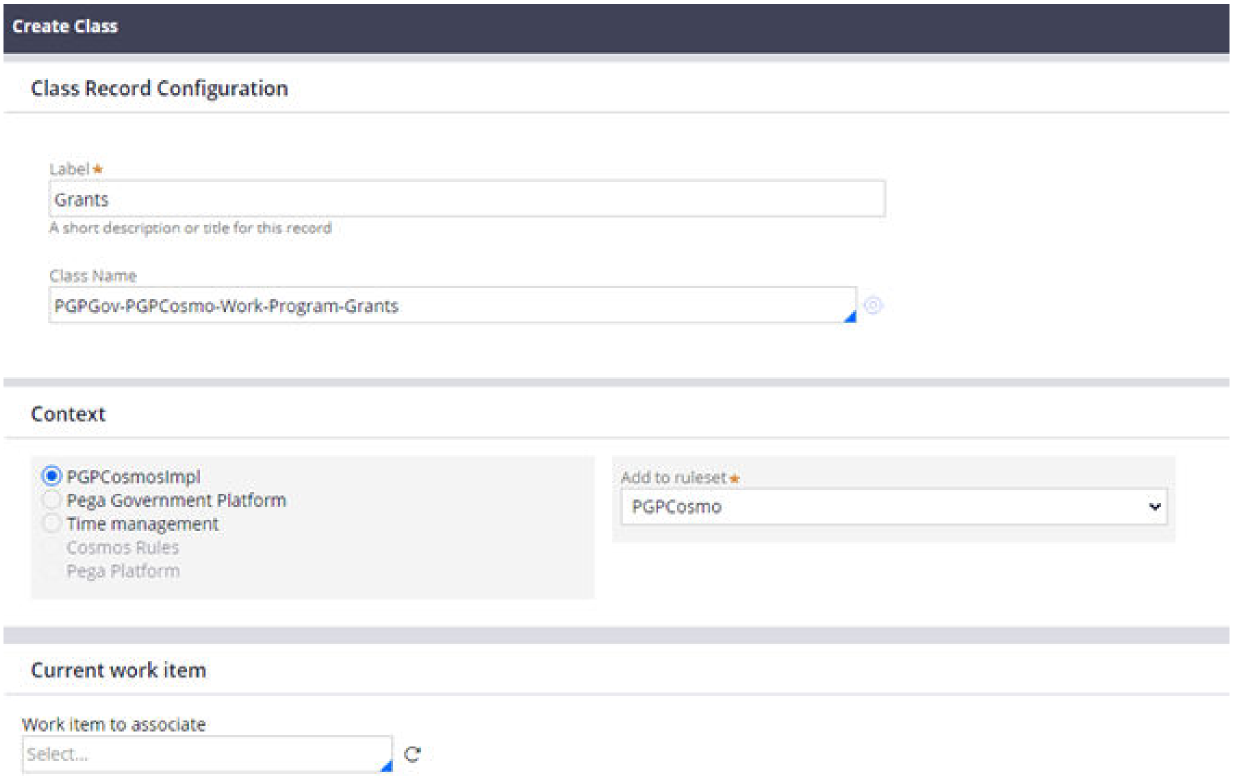
20. Click **Save** to save the Option map data type.
21. Open the *D_PGPOptionMapList* and *D_OptionMapList* data pages and on the **Load Management** tab, click on **Clear data page**.
22. If you have deleted any required fields in step 12, delete the property in the *ValidateMandatoryDetails* validation rule.
23. In the header of , click **Create** > **SysAdmin** > **Class**.
24. Enter the details in the **Class Record Configuration** and the **Context** sections, and then click **Create and open**.



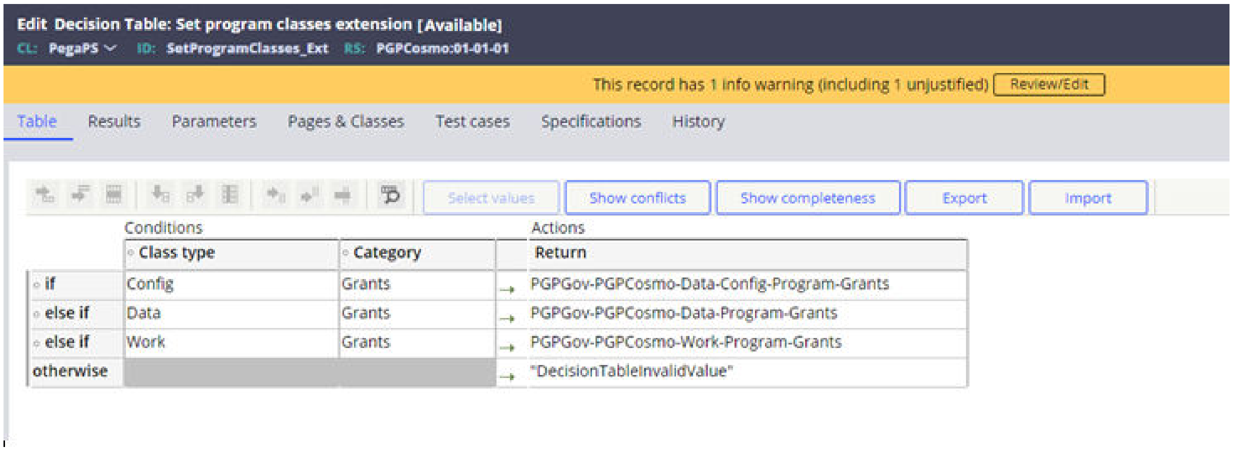
25. In the **Created in version** box, enter or select the ruleset version, on the **History** tab enter a description and then click **Save**.



26. Open the Implementation Program work class and click **Save as**.
27. Enter the details and click **Save**.



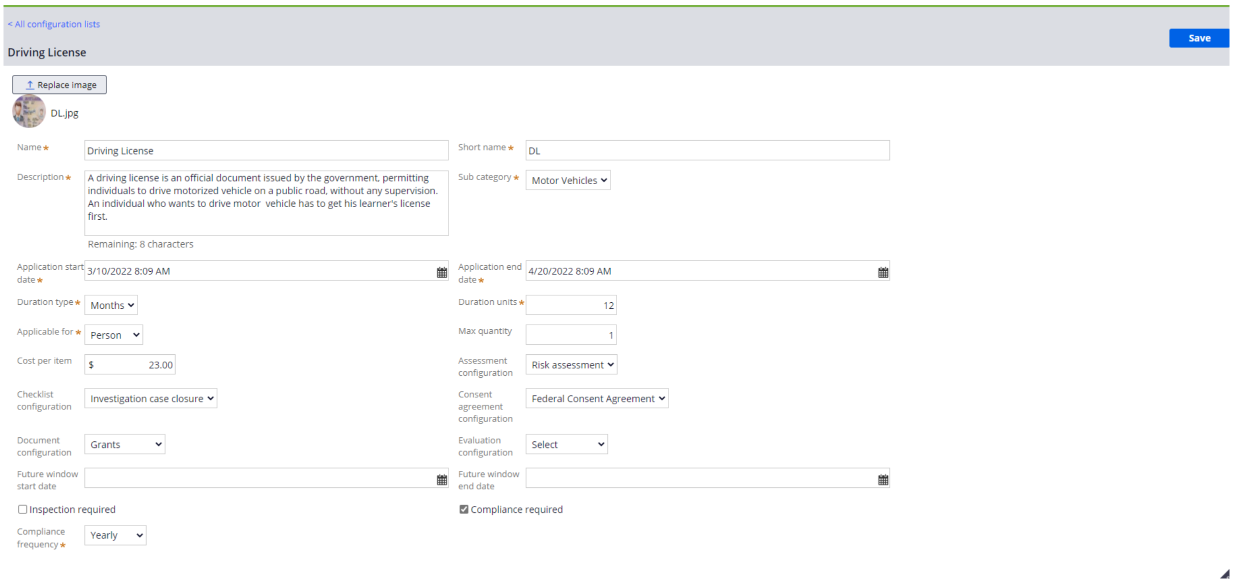
28. Search and open the *SetProgramClasses (CL:PegaPS)* decision table, click **Save as** to save it to the implementation layer ruleset.
29. Add an else if condition for the new program configuration and in the Return column, enter the newly created Config class, for example, *PGPGov-PGPCosmo-Data-Config-Program-Grants*. Similarly, configure the new data and work classes.



Editing or adding a new program

For different applications, you may have various programs. Using App Studio, you can edit an existing program/license configuration details, or add a new program/license configuration with details.

1. Log in to Pega Government Platform as an administrator.
2. In the header of your workspace, click the **Switch Studio** menu, and then click .
3. In the navigation pane of App Studio, click **PGP**, and in the quick launch menu, click **Program configuration**.
4. In the **Category** list, select Program or License.
5. Click any program or license to edit it, or click the **New configuration** button to create a new program or license.
6. Enter the details about the program and upload the image if required.
7. Click **Save**.



Extending program configuration by adding new field

1. Create a new property in the *PegaPS-Data-Config-Program* class.
2. Update the *ProgramConfigurationDetails (CL:PegaPS-Data-Config-Program)* section and include the newly created property.

Operator Case Involvement (Touch) reporting

Review reports and analyze the day-to-day work of operators in the investigative case management applications. Touch reports provide insights about the work of an operator, on investigation cases, for a given time period.

- An operator touch report that shows the work for an operator for a given time period.
- A team touch report for a supervisor, to review the cases their team members worked on for a given time period. The team report access is restricted only to supervisors.
- A touch report for investigation cases, but can be extended to any case.

Touch points of operator for investigation

Edit report Actions

Generated on November 17,2021 01:17:07

Filtered by: Performer = ICM Cosmos Agent and Time = Current week and Work id Is not null and Object Class of this instance = PGPGov-ICMCosmo-Work-ICM-Investigation-Initiate

Displaying 16 records

Message	Time created ↓	
INVESTIGATION-2006 : sad		14
Notified the assignee Jason Lewis about the case ownership	11/16/2021 6:29 AM	
Transfer ownership task is performed.	11/16/2021 6:28 AM	
Transfer ownership task is performed.	11/16/2021 6:21 AM	
Request access R-129 from Jason is processed with action custom access.	11/16/2021 6:16 AM	
Created ROI.	11/16/2021 5:54 AM	
Created ROI.	11/16/2021 5:51 AM	
Assessment AS-2 has been conducted.	11/16/2021 5:50 AM	
Assessment AS-1 has been conducted.	11/16/2021 5:47 AM	
Child case sd P-2 has been resolved.	11/16/2021 5:46 AM	
Child case sd P-1 has been resolved.	11/16/2021 5:44 AM	
Conducted INTERVIEW-8.	11/16/2021 4:58 AM	
EVIDENCE-4 is added.	11/16/2021 4:56 AM	
SUBJECT-1011 is associated to INVESTIGATION-2006	11/16/2021 4:54 AM	
INVESTIGATION-2006 created.	11/16/2021 4:53 AM	
INVESTIGATION-1001 : Theft at bank		2
FACILITY-3 is associated to INVESTIGATION-1001	11/16/2021 6:32 AM	
Case has been accepted by ICM Cosmos Agent	11/15/2021 7:31 AM	

Touch points of team for investigation

Edit report | Actions

Generated on November 17,2021 01:54:06

Filtered by: Time = Current week and Work id Is not null and Performer Is not null and Object Class of this instance = PGPGov-ICMCosmo-Work-ICM-Investigation-Initiate

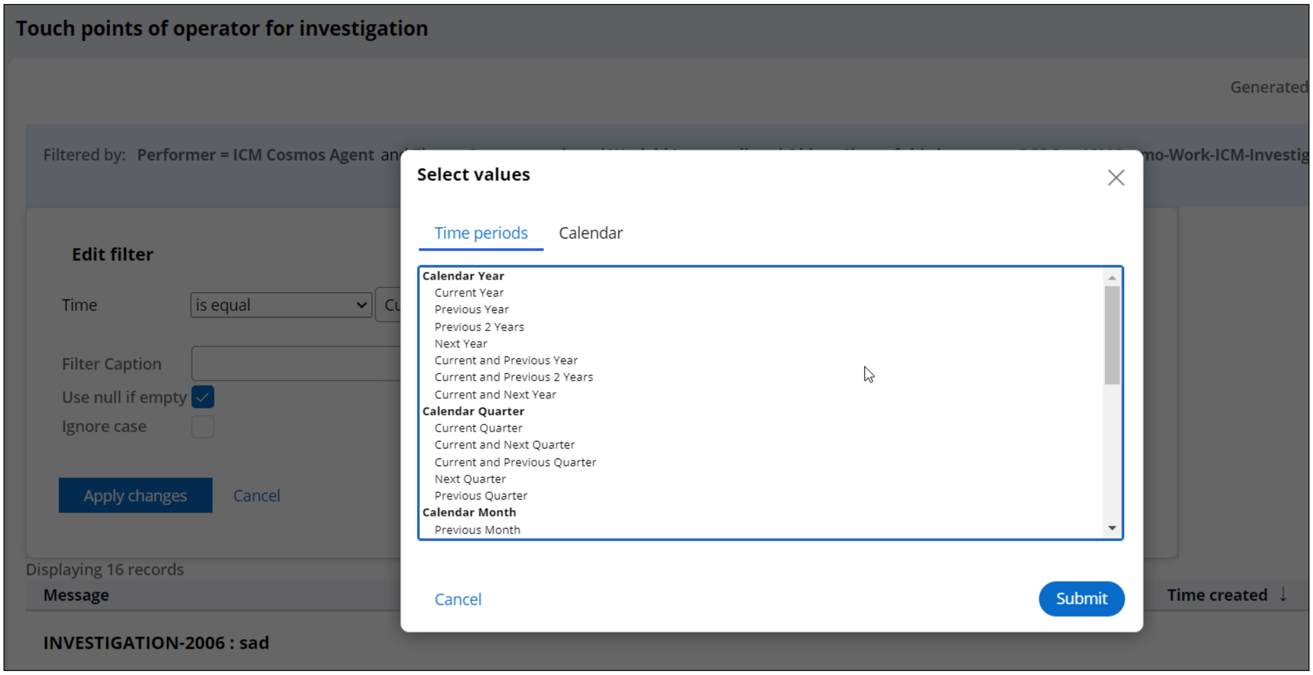
Displaying 18 records

ID [1] ↓	Name	Message	Time created [2] ↓
ICM Cosmos Agent			16
INVESTIGATION-2006	sad	Notified the assignee Jason Lewis about the case ownership	11/16/2021 6:29 AM
INVESTIGATION-2006	sad	Transfer ownership task is performed.	11/16/2021 6:28 AM
INVESTIGATION-2006	sad	Transfer ownership task is performed.	11/16/2021 6:21 AM
INVESTIGATION-2006	sad	Request access R-129 from Jason is processed with action custom access.	11/16/2021 6:16 AM
INVESTIGATION-2006	sad	Created ROI.	11/16/2021 5:54 AM
INVESTIGATION-2006	sad	Created ROI.	11/16/2021 5:51 AM
INVESTIGATION-2006	sad	Assessment AS-2 has been conducted.	11/16/2021 5:50 AM
INVESTIGATION-2006	sad	Assessment AS-1 has been conducted.	11/16/2021 5:47 AM
INVESTIGATION-2006	sad	Child case sd P-2 has been resolved.	11/16/2021 5:46 AM
INVESTIGATION-2006	sad	Child case sd P-1 has been resolved.	11/16/2021 5:44 AM
INVESTIGATION-2006	sad	Conducted INTERVIEW-8.	11/16/2021 4:58 AM
INVESTIGATION-2006	sad	EVIDENCE-4 is added.	11/16/2021 4:56 AM
INVESTIGATION-2006	sad	SUBJECT-1011 is associated to INVESTIGATION-2006	11/16/2021 4:54 AM
INVESTIGATION-2006	sad	INVESTIGATION-2006 created.	11/16/2021 4:53 AM
INVESTIGATION-1001	Theft at bank	FACILITY-3 is associated to INVESTIGATION-1001	11/16/2021 6:32 AM
INVESTIGATION-1001	Theft at bank	Case has been accepted by ICM Cosmos Agent	11/15/2021 7:31 AM
Jason Lewis			2
INVESTIGATION-2006	sad	Case owner has been changed to Jason Lewis	11/16/2021 6:30 AM
INVESTIGATION-2006	sad	Case ownership has been accepted by Jason Lewis	11/16/2021 6:30 AM

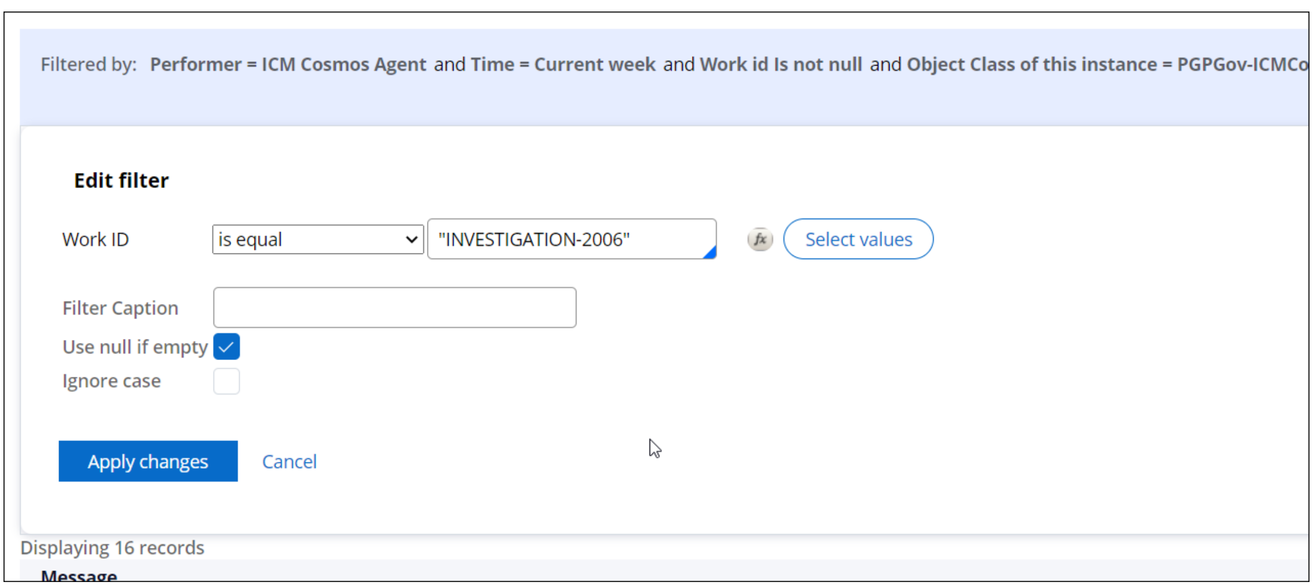
Changing filter conditions

View the audit details of investigations for different time periods. By default, the work for the current week is displayed. You can change the time period.

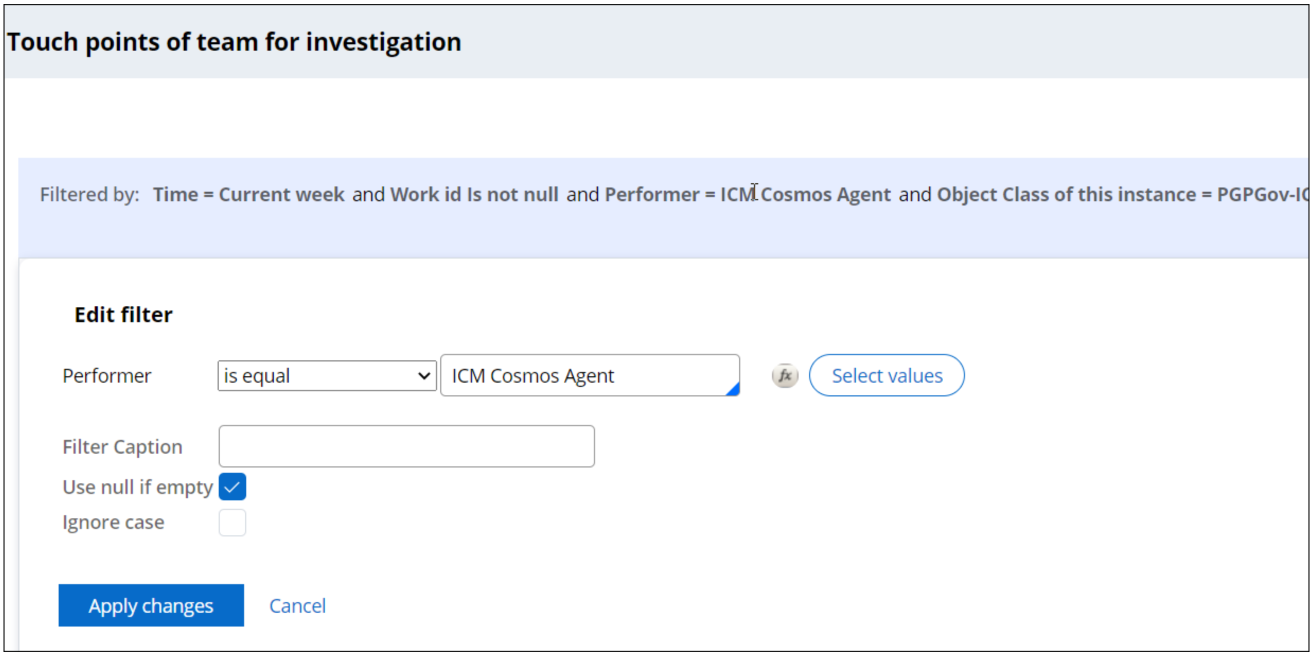
By clicking **Time filter** and **Select values**, you get options to select different time periods or a particular date.



By default, the report displays the audit details of all the investigations. To view the audit details of an investigation, click the **Work ID** filter and enter an **Investigation ID**.



By default, the report displays the work of all the team members. To display the work of a team member, click the **Performer**filter and mention the name of the operator.



Adding new column to reports

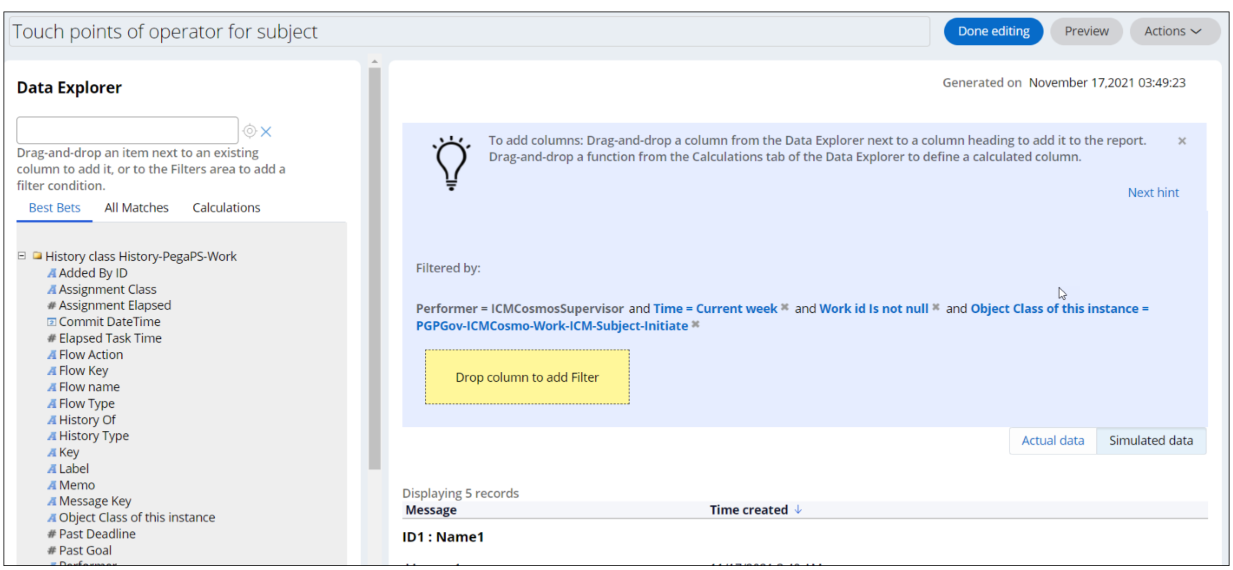
Display new columns for touch points of an operator for an investigation report. You can view other details of an investigation, such as reported activity, description, and so on.

1. Save the *InvestigationTouchReportForOperator (CL: History-PegaPS-Work)* report definition into the implementation ruleset.
2. Click **Add column** and enter the property that you want to display as a column and save.
3. Save the *InvestigationTouchReportForTeam (CL: History-PegaPS-Work)* report definition into the implementation ruleset.
4. Click **Add column** and enter the property that you want to display as a column and save.

Creating similar reports for other case

As a manager or a team member, create similar reports for different case types.

1. Log in with an operator which points to the ICM implementation app.
2. In the user portal, in left navigation pane, click on **Reports**.
3. Click the **All Reports** tab, and search for the touch point of the operator for investigation and click that.
4. In the header, click **Actions** and then click **Save as**.
5. Enter the **Title**, **Description** and **Category**, and click on **Submit**.
6. Click the Object Class of this instance filter and provide the class value of the new case type for which similar report is required.
7. Click the **Apply Changes** button.
8. In the header, click the **Done editing** button. A new report for the new case gets created.
   Similarly we can follow same steps for Touch points of team for investigation.



Time Management

Time Management application provides a generalized time management system to track and report time for case workers that is consistent with applicable standards and guidelines.

Users use this application to capture, submit time entries for approval, re-submit rejected time entries on a daily basis. Users have multiple opportunities to record their time throughout the workday or they can enter time for the entire day and submit for approval as a part of their end-of-day activities.

The Managers can view the time entries submitted by their workgroup and they can Approve or Reject the time entries.

Data tables used in Time Management application are as follows:

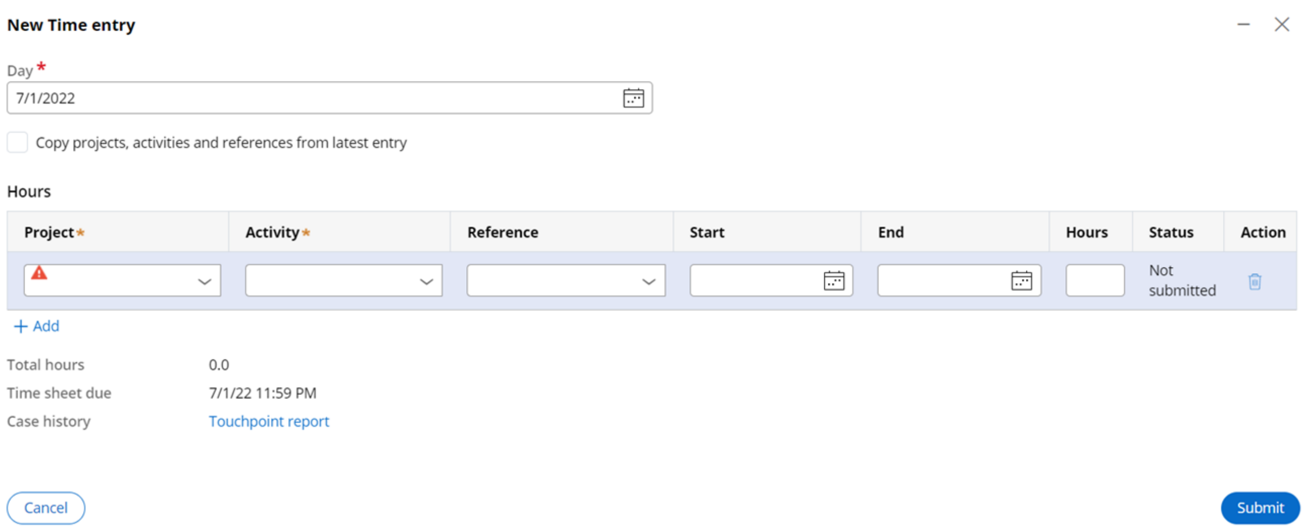
- The **Project** data table stores and lists all the projects details available in the system. This table contains information about projects such as Project ID, Project name, Project details, Project approver, and so on.

- The **Time code** table contains information about time codes such as name, description, Approver, status, and so on.

The time management features are enhanced in release ’23 to support cascading approval for time entries. You can control the routing of approvals based on the configuration of the time management project.

Based on the selected approvals for a project in data records, Time entry is routed to different levels of approvals accordingly. If all routing paths are enabled the approval action goes first to the Work Group Manager, then to the Time Code Approval , and to the Project owner Approval

Note: If time code approval is enabled at project level, and if the time code does not have an approver or owner, the approval of the specific time code entry is skipped and moved to the next step accordingly.

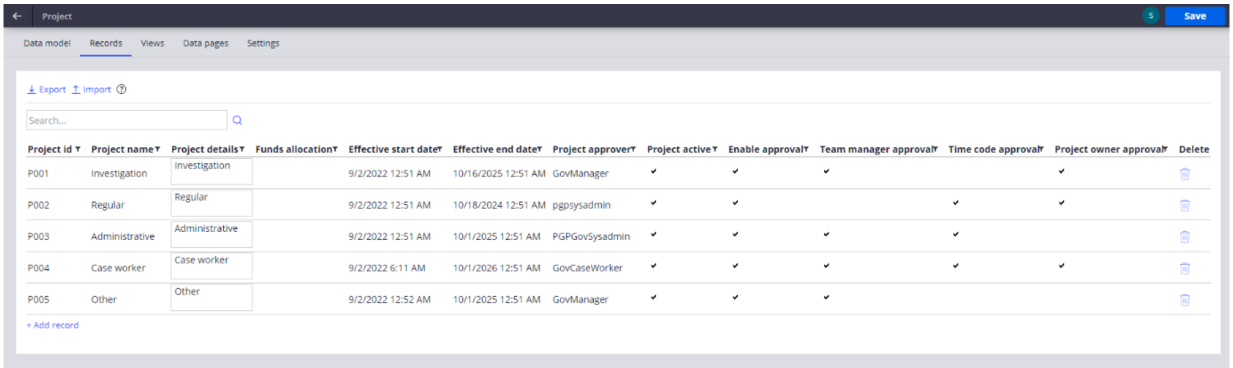


Time entry

Cascading approval

Follow these steps, to enable cascading approval,

1. Login from **App studio** > **Data** > **Project** > **Records**. The list of records for the selected project is displayed.
2. Select **Enable approval** and select team manager approval, time code approval and project owner approval based on your requirement.
3. Click **Save**. A tick mark appears under the selected records.



Records

- **Technical description**
- **Configurations**
- **Extensions**

Technical description

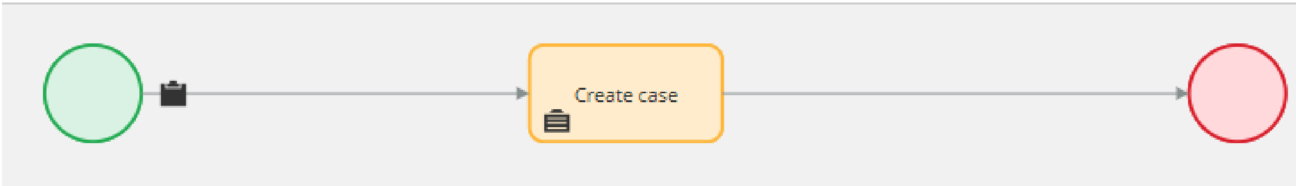
Based on the type of approvals selected for a project in data records, Time entered for that project would be routed to different levels of approvals accordingly.

- **Time entry flow**
- **Manage time**

Time entry flow

This feature allows users to log time against a case for the current day. The time logs are reviewed by manager or supervisor and they can approve or reject the time log.

The flow can be reused in such a way that users can initiate time entry log from any case type. As it is initiated from a case the reference details are auto populated.



time entry flow

View time in case

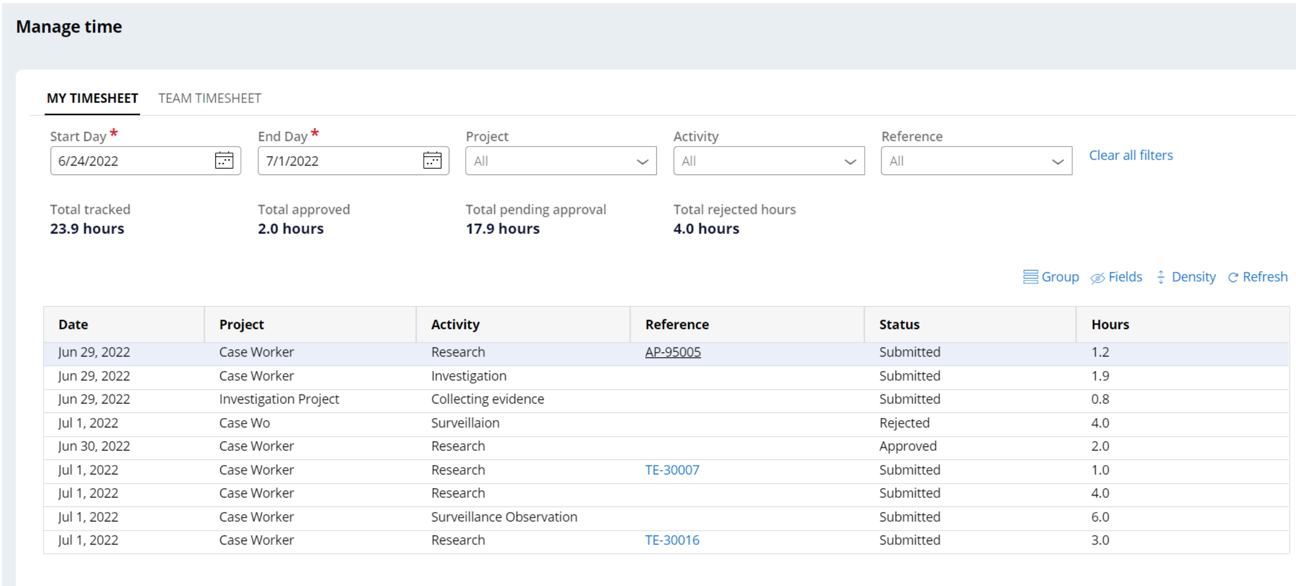
This feature allows user to view the summary chart and reports on time entry logs for a particular case.

Time entry in Investigation

In investigation case users can log time from Action > Add work and the reference details are auto populated. The View time in case is also included to the case but only the investigation owner and manager/supervisor can view it.

Manage time

Time Management also has a Manage time landing page in which users can view time entry logs for a given time period, a manager can view all time entry logs for a team.



Date	Project	Activity	Reference	Status	Hours
Jun 29, 2022	Case Worker	Research	AP-95005	Submitted	1.2
Jun 29, 2022	Case Worker	Investigation		Submitted	1.9
Jun 29, 2022	Investigation Project	Collecting evidence		Submitted	0.8
Jul 1, 2022	Case Wo	Surveillaion		Rejected	4.0
Jun 30, 2022	Case Worker	Research		Approved	2.0
Jul 1, 2022	Case Worker	Research	TE-30007	Submitted	1.0
Jul 1, 2022	Case Worker	Research		Submitted	4.0
Jul 1, 2022	Case Worker	Surveillance Observation		Submitted	6.0
Jul 1, 2022	Case Worker	Research	TE-30016	Submitted	3.0

Manager view - Manage time

Time management also provides restricted access to time entries, which is enforced by attribute based access control (ABAC) rules:

1. Users access their own entries.
2. Managers access entries for themselves and from case workers in their work group.
3. Administrators view all entries.

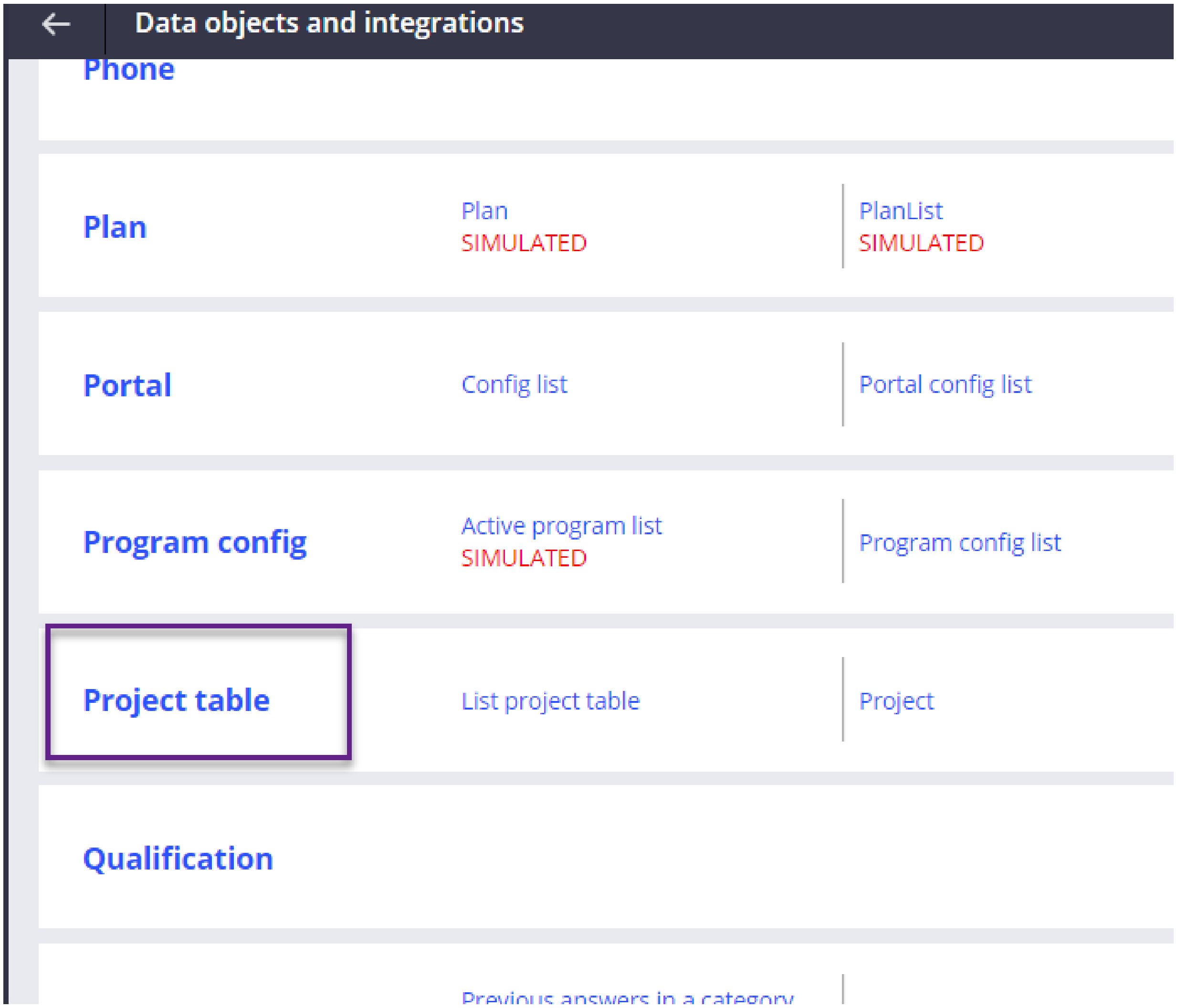
Configurations

- **Adding, deleting, or updating records in a project table**
- **Adding, deleting, or updating records in Time code data objects**
- **Enable or disable timesheet deadline validation**
- **Changing the due time of a time sheet**

Adding, deleting, or updating records in a project table

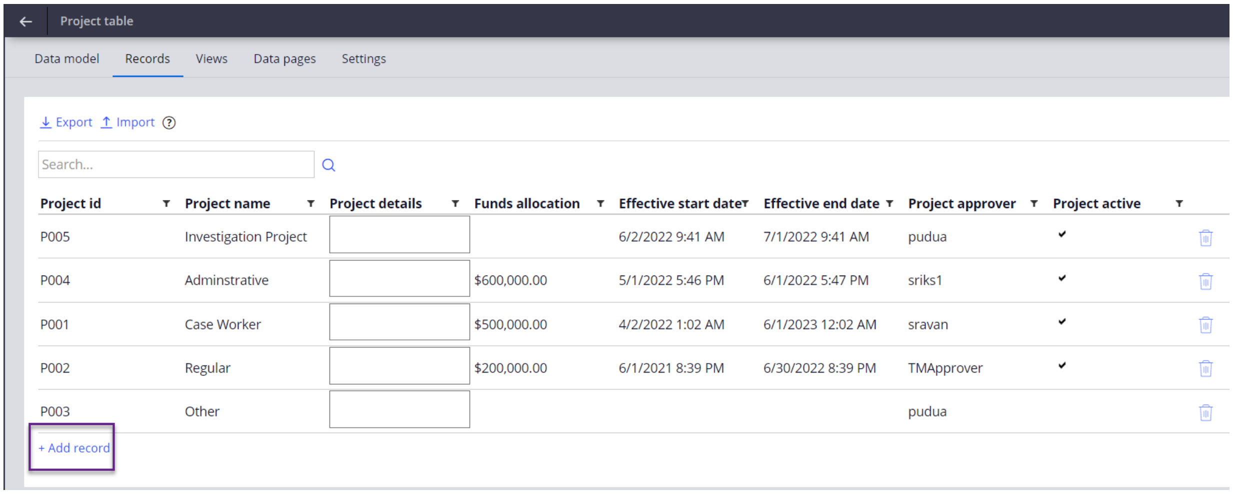
Add, delete, or update records in project table:

1. In the navigation pane of App Studio, click **Data** > **Data objects and integrations**.
2. In the list of data objects, click **Project table**.



Project table data object

3. Click the **Records** tab.



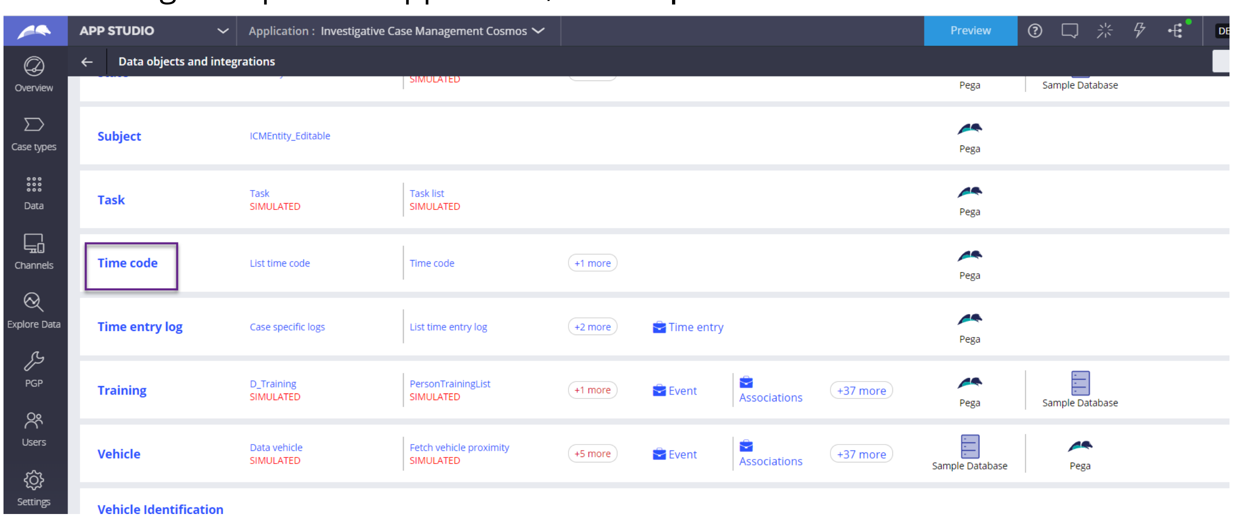
Records tab in of the project table

4. Click on any row to update the project record.
5. Click the **Delete** icon to delete the project record.
6. Click **Add record** to add a new project.

Adding, deleting, or updating records in Time code data objects

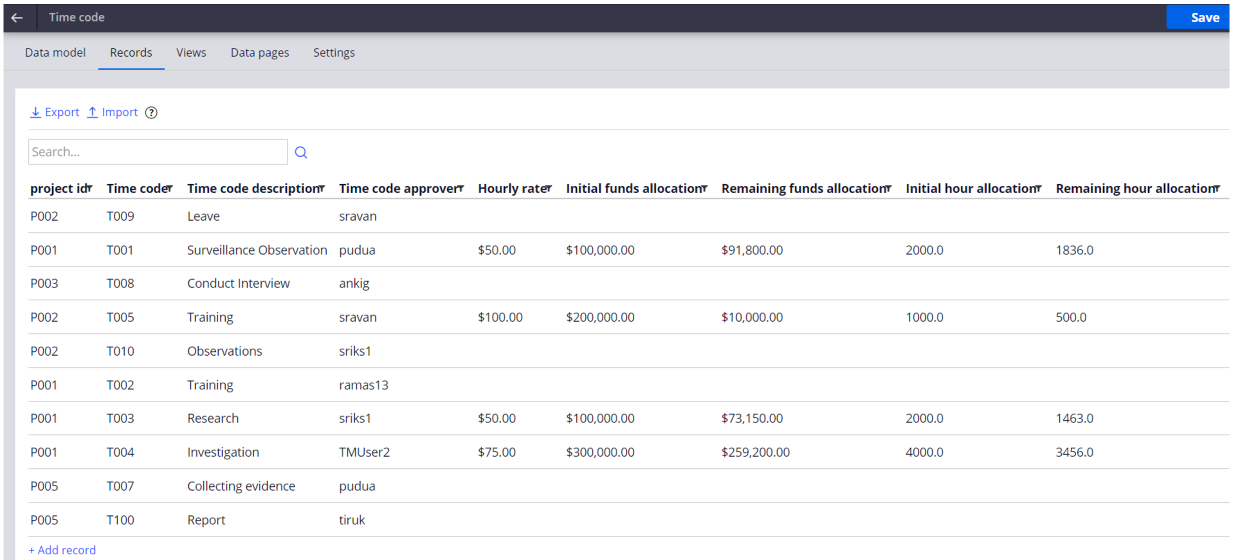
Add, delete, or update records in Time code data objects to xxx.

1. In the navigation pane of App Studio, click **Explore Data**.



Time code data object

2. In the **Data objects and integrations** window, click the Records tab to view the time codes that are available in the system.



project id	Time code	Time code description	Time code approver	Hourly rate	Initial funds allocation	Remaining funds allocation	Initial hour allocation	Remaining hour allocation
P002	T009	Leave	sravan					
P001	T001	Surveillance Observation	pudua	$50.00	$100,000.00	$91,800.00	2000.0	1836.0
P003	T008	Conduct Interview	ankig					
P002	T005	Training	sravan	$100.00	$200,000.00	$10,000.00	1000.0	500.0
P002	T010	Observations	sriks1					
P001	T002	Training	ramas13					
P001	T003	Research	sriks1	$50.00	$100,000.00	$73,150.00	2000.0	1463.0
P001	T004	Investigation	TMUser2	$75.00	$300,000.00	$259,200.00	4000.0	3456.0
P005	T007	Collecting evidence	pudua					
P005	T100	Report	tiruk					

Time code records

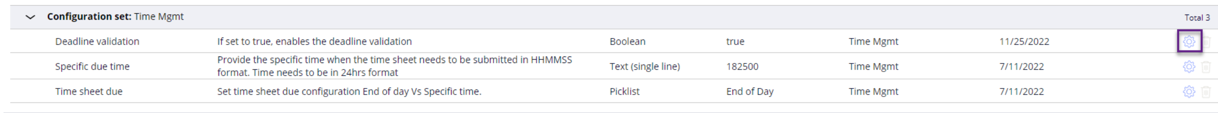
3. **Optional:** To update a time code record, click the row of the record that you want to update.
4. **Optional:** To delete a time code record, click the Delete icon at the end of each row.
5. **Optional:** To add a new time code, at the end of the list click Add record.
6. Click Save to save the changes.

Enable or disable timesheet deadline validation

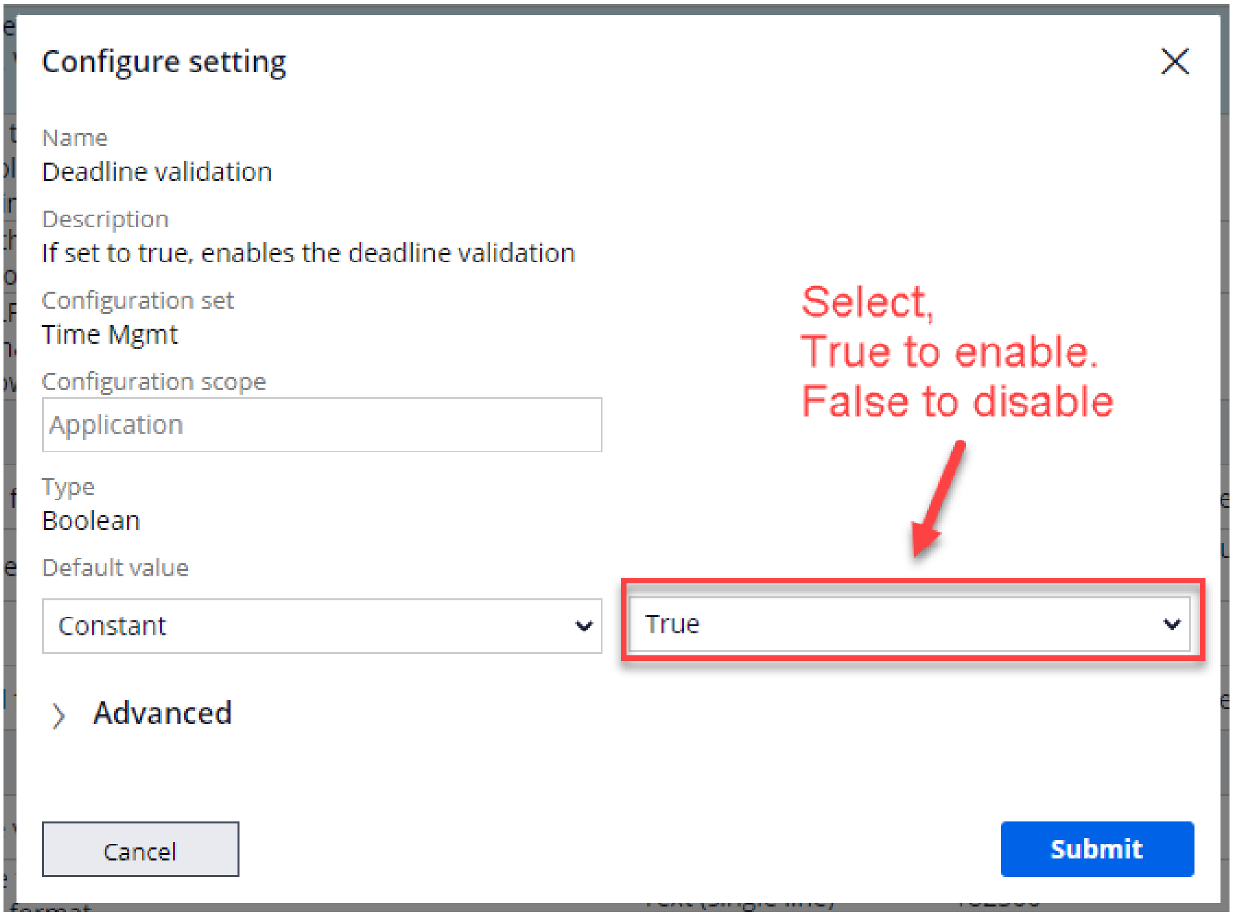
Configure timesheet deadline validation to enable or disable on runtime. Enabling deadline validation will validate the timesheet due. Disabling deadline validation in configuration will skip the timesheet due validation in runtime.

To enable/disable the timesheet deadline validation at runtime, follow these steps:

1. In the navigation pane of App Studio, click Settings > Configurations.
2. Click the Settings icon at the end of the deadline validation row.
3. Select constant value as True to enable deadline validation and click Submit.
4. Select constant value as False to disable deadline validation and click Submit.



Deadline vaildation



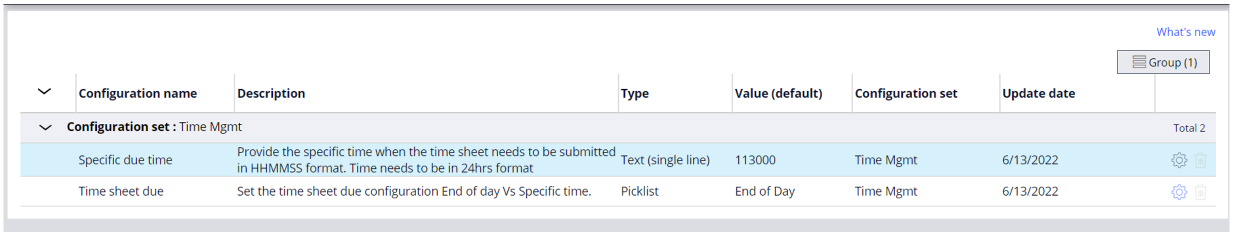
Configure setting

Changing the due time of a time sheet

Configure the **Time sheet due** setting to change the due time for a time sheet. The default end of the day for a time sheet is 11:59 PM. This is called the due time. If a time entry case is submitted after the due time, the system displays a validation error and the user can not submit the case again.

1. In the navigation pane of App Studio, click **Settings** > **Configurations**.
2. Click the **Settings** icon at the end of the **Time sheet due** row.
3. Select **Specific time** from the list and then click **Submit**.

4. Click the **Settings** icon at the end of the **Specific due time** row.
5. Enter a new due time as `HHMMSS`, in 24-hour format, for when users must submit the time sheet.



Configuration name	Description	Type	Value (default)	Configuration set	Update date
Configuration set : Time Mgmt					Total 2
Specific due time	Provide the specific time when the time sheet needs to be submitted in HHMMSS format. Time needs to be in 24hrs format	Text (single line)	113000	Time Mgmt	6/13/2022
Time sheet due	Set the time sheet due configuration End of day Vs Specific time.	Picklist	End of Day	Time Mgmt	6/13/2022

update timesheet

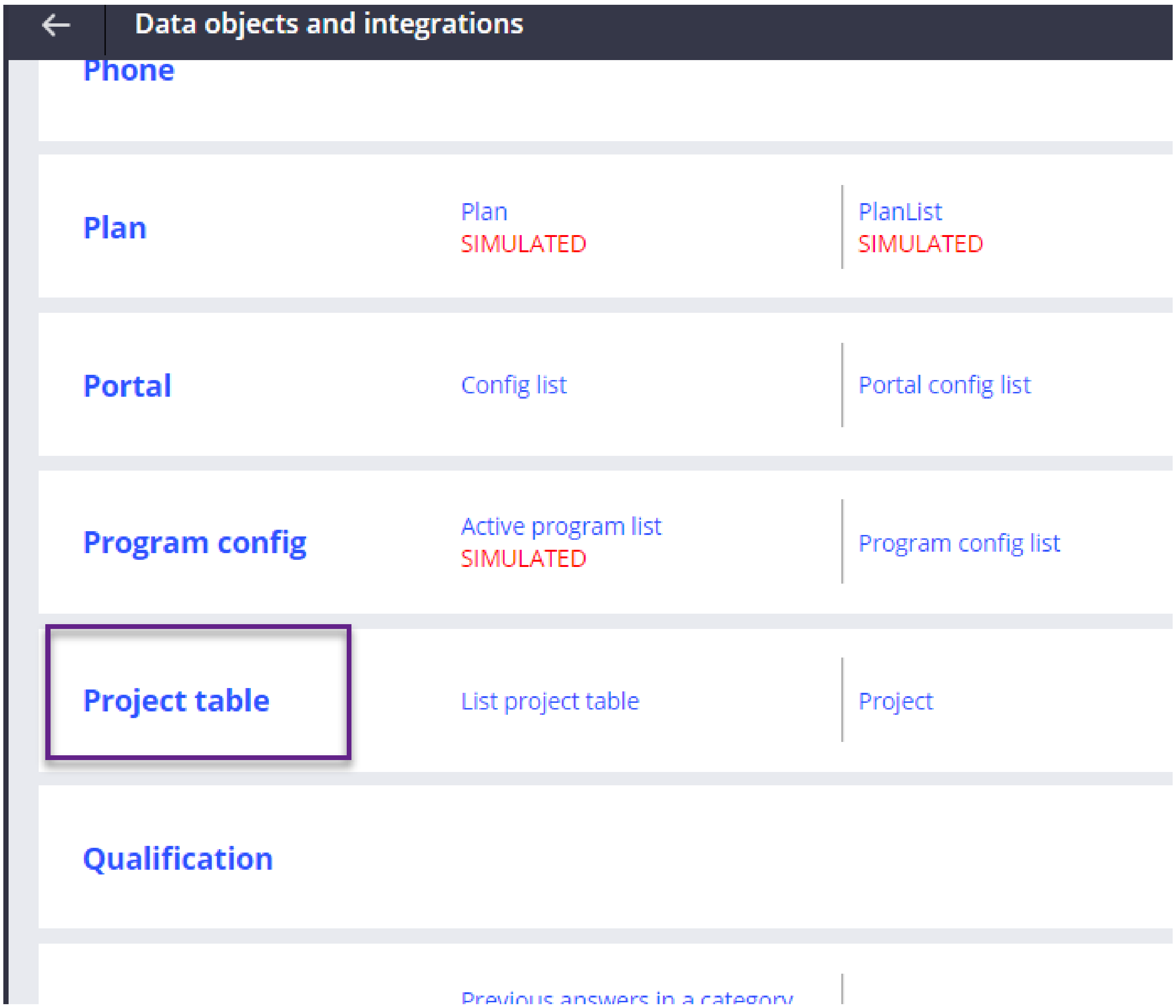
Extensions

- **Adding new fields to project tables**
- **Adding new fields to Time code data objects**
- **Adding new fields to the time entry view**
- **Adding new fields to time entry log data objects**
- **Adding time entry to a case**
- **Adding a time tab (view time in case)**

Adding new fields to project tables

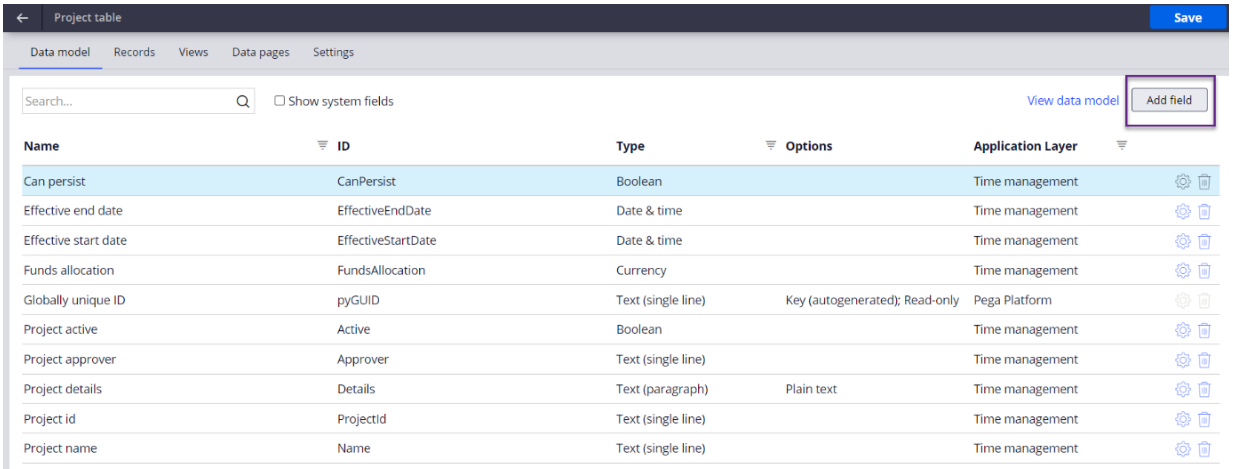
Add a new field to the project table in the Time Management application.

1. In the navigation pane of App Studio, click **Data** > **Data objects and integrations**.
2. In the list of data objects, click **Project table**.



Project table data object

3. On the **Data model** tab, check all the existing fields.
4. Click **Add field**.
5. Click **Save**.

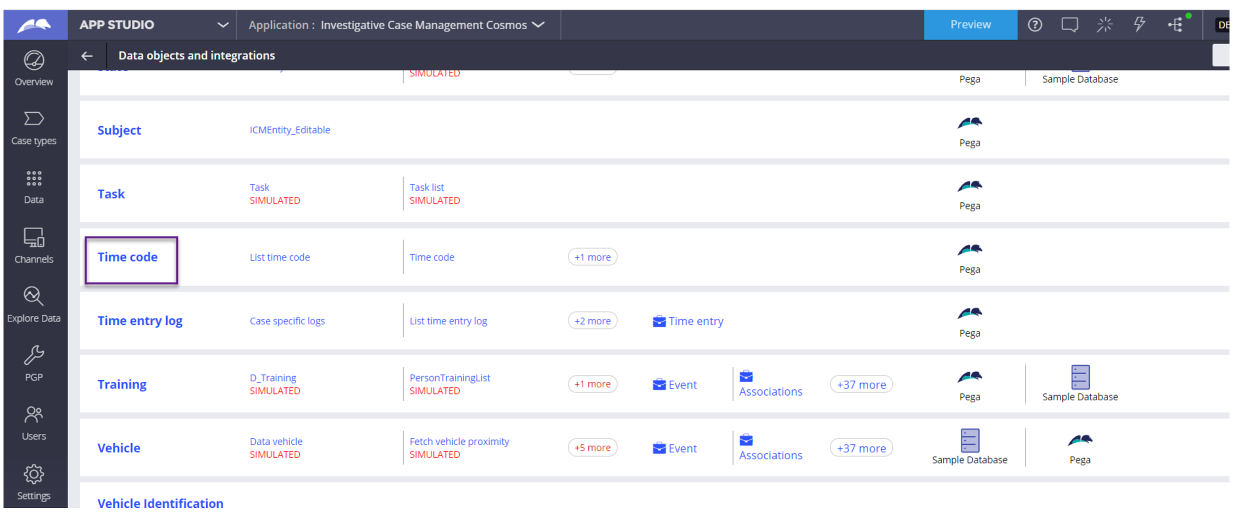


Data model

Adding new fields to Time code data objects

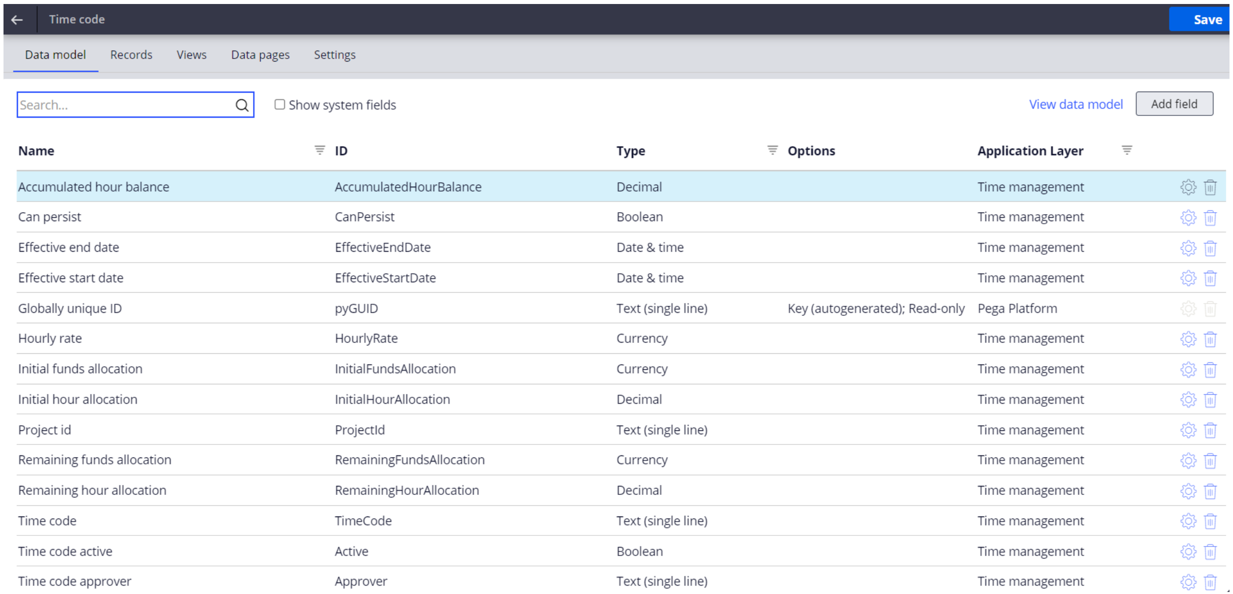
Add a new field to a Time code data object to xxx

1. In the navigation pane of App Studio, click **Explore Data**.
2. In the **Data objects and integrations** window, click the **Time code** data object.



The Time code data object

3. On the **Data model** tab, review the existing fields.
4. **Optional:** To add a new field, click **Add field**.

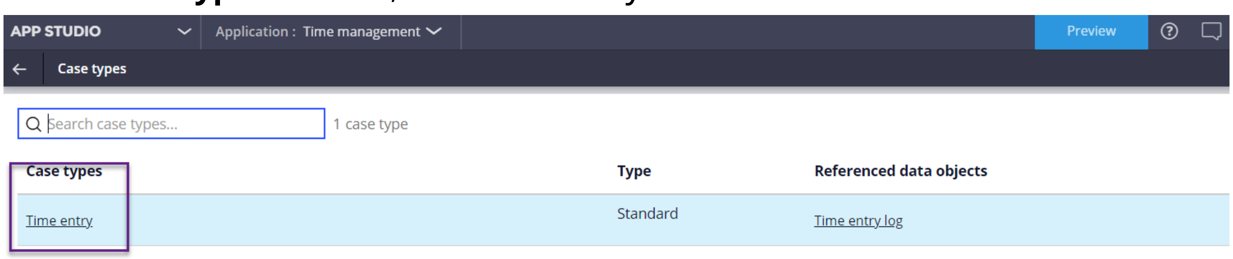


The Data model tab of the Time code window

Adding new fields to the time entry view

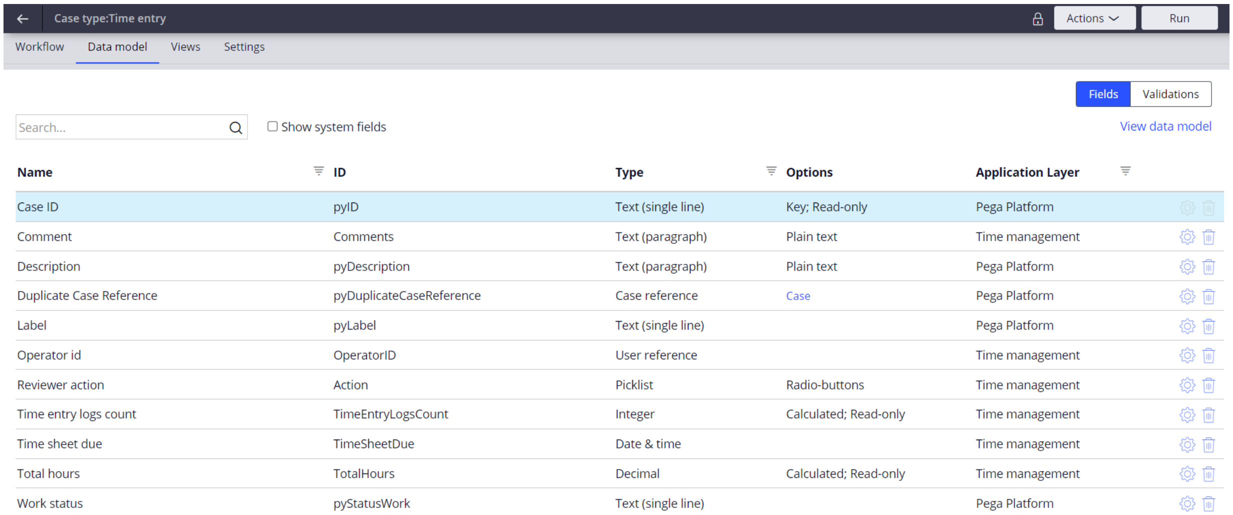
Add a new field to the time entry view xxx.:

1. In the navigation pane of App Studio, click Explore Data.
2. In the **Case types** window, click Time entry.



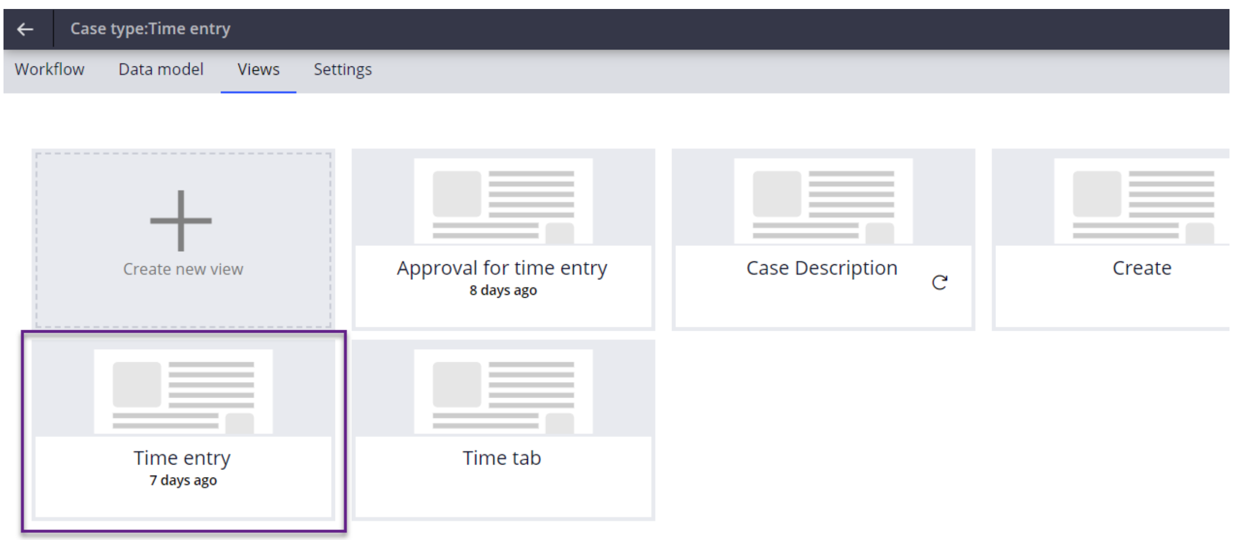
Time entry case type

3. On the Data model tab, review the existing fields.
4. **Optional:** To add a new field, at the end of the list click Add field.



Time entry - Data model tab

5. Click **Views** > **Time entry**.



Time entry - the Views tab

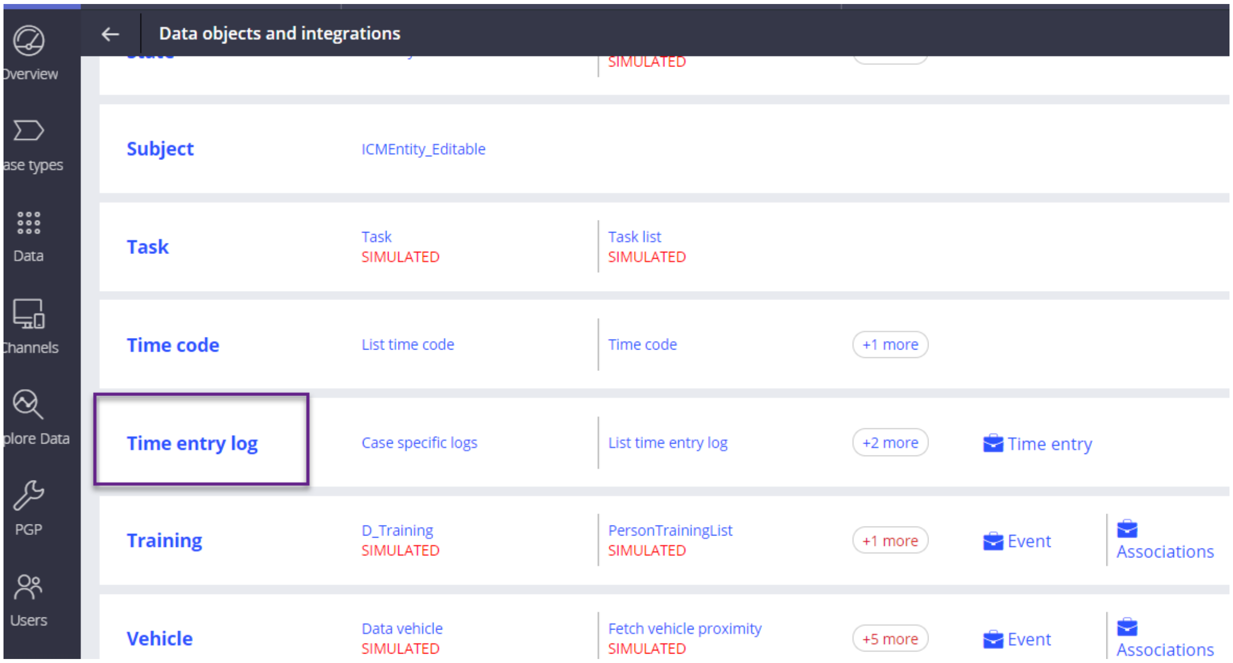
6. Search for and add the new field to the view.

Adding new fields to time entry log data objects

Add a new field to time entry log data objects to xxx.

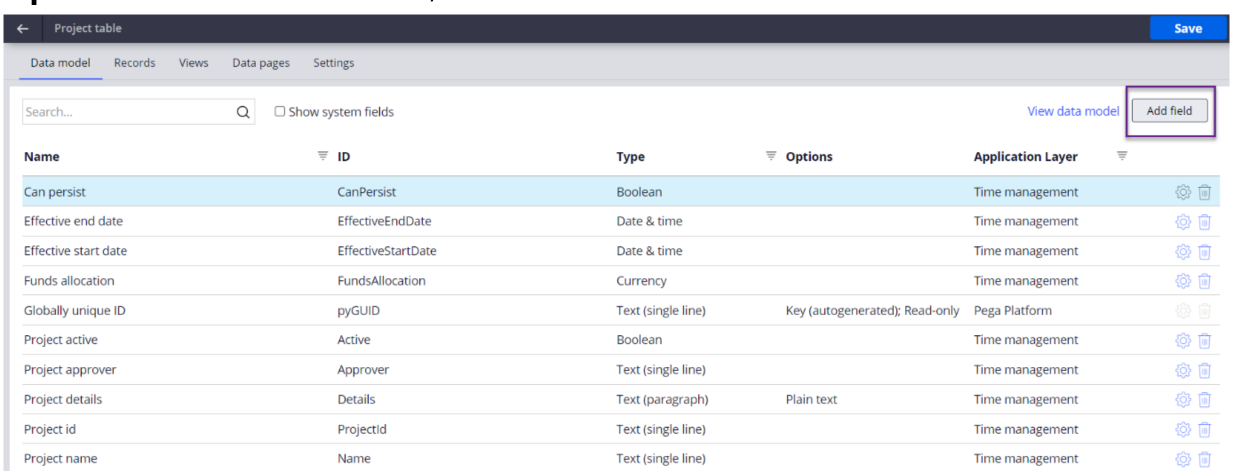
1. In the navigation pane of App Studio, click **Explore Data**.

2. In the **Data objects and integrations** window, click the Time entry log data object.



The Time entry log data object

3. On the **Data model** tab, review the existing fields.
4. **Optional:** To add a new field, click **Add field**.



Time entry log - Data model tab

5. Switch to Dev Studio.
6. In Dev Studio, save the **TimeEntry_TimeEntryLogs** (*CL:PS-TimeMgmt-Work-TimeEntry*) section and add the newly added field as a column to the table layouts.

7. Repeat step 6 to save the following sections into the implementation layer and add a new field as a column to the table layout:
    - *ApprovalTimeEntryLog*
    - *Approval_TimeEntryLogs*
8. Add the field that you added in step 7 as a column in the following report definitions class of **PS-TimeMgmt-Data-TimeEntryLog**:
    - *TimeEntryLogList*
    - *LatestTimeEntryLogList*
    - *MyTimeLogListLP*
    - *CaseTimeEntryLogList*

Adding time entry to a case

Open case type in app studio, **Optional actions** > **add a new process to a stage** > **add step** > **More** > **Processes** > **Time Entry**

Adding a time tab (view time in case)

Open *pyCaseMainInner* section rule of that class, under Main content add a section control with section name "TimeWrapper" with page context as "Use current page context."

Appendix A: Using Pega Government Platform (PGP) from Pega Customer Service

- **Business Objective**
- **Purpose**
- **Solution**
- **Implementation steps**

Business Objective

In the past, Pega Government Platform customers have found it challenging to integrate PGP with Pega Customer Service in a manner that enables the best of both products' worlds: government entity management and communications channel management. Working through the the initial integration of these two products has been known to take two or more weeks out of a development schedule. For sales demonstration teams and customers, this represents a significant hardship.

Purpose

PGP product management provides an integration approach and a supporting ruleset to greatly reduce the PGP + CS project setup time so that our customers can focus on the business of specifying case types and not be distracted by initial product stack configuration.

Solution

Several plausible solution architectures are developed in response to these challenges (see ###whitepaperxxxx###, and ###whitepaperyyyy###). The PGP team have chosen to provide a CS implementation layer ruleset which contains rule overrides for common extensions from PGP and CS enabling the high-value features from both products.

- All PGP core case types are enabled for use in CS, with full interaction driver support
- Person View and Business View integrated
- CS contact search integrated to PGP person entity
- CS business search integrated to PGP business entity
- Shared work pool: Cases created in the CS layer can be processed in the PGP layer
- Pega Call Demo-Pop support for common PGP Demo personas. For example, Marty Solomon

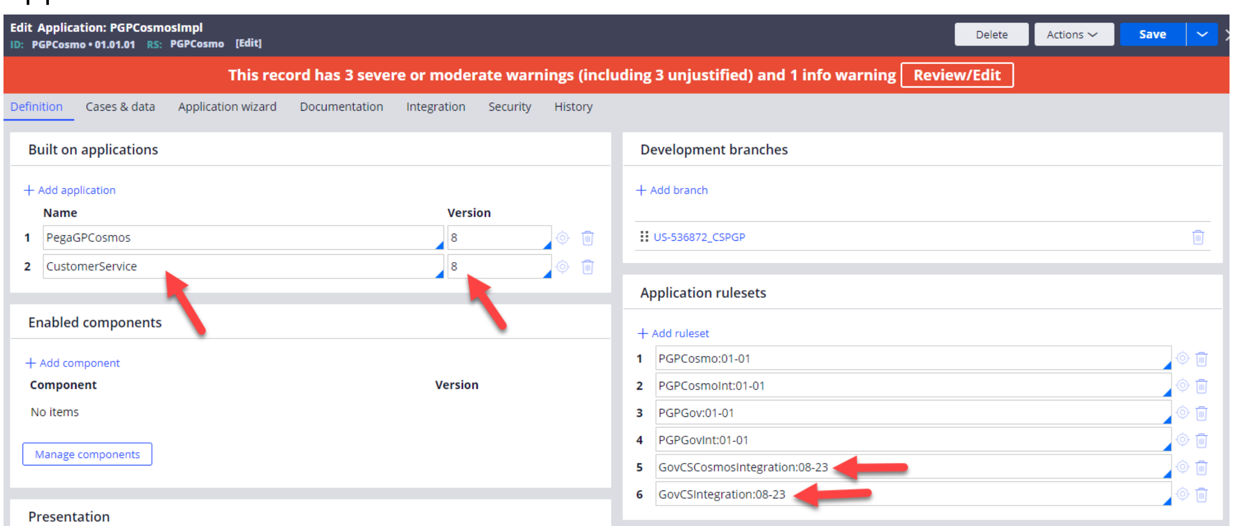
By leveraging the PGP + CS Bridge (GovCSIntegration85.zip), this effort to build the CS+PGP initial integrated product stack can be greatly reduced, and on-premises customers can assemble the application stack and be ready to build an application on PGP and CS under 2 hours.

This integration kit is available on the Pega Marketplace at the following URL

https://community.pega.com/marketplace/components/pgp-customer-service-integration-ruleset

Implementation steps

1. If you have existing implementation layer application built on Pega Government Platform, then you can go to step 3.
2. To build a new implementation layer on top of Pega government platform application then follow the PGP implementation guide.
3. For instance, if you have built PGP Demo application on Pega Government Platform (or ICM, Procurements, Complaints) application, then open the application definition and add CustomerService application to the built-on applications stack and GovCSIntegration ruleset (for UI-kit) and and GovCSIntegration and GovCSCosmosIntegration rulesets (For Cosmos) to Application ruleset stack as shown below.

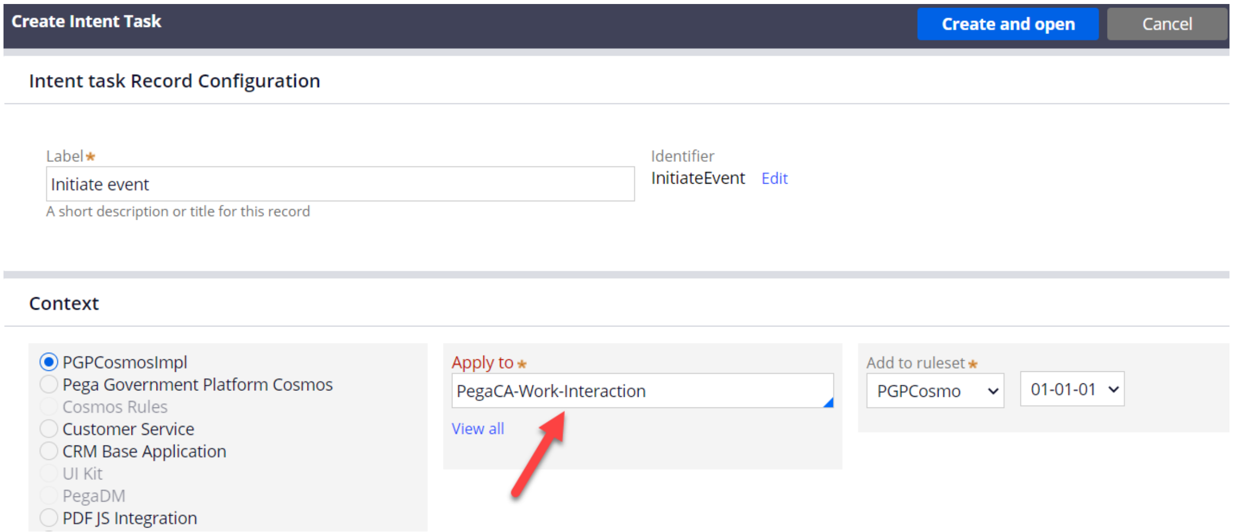


App built on theme-cosmos

4. Logoff and login again to reset the ruleset stack.
5. For case types that were already built in the implementation layer (i.e, only for old case types), go to **records explorer**, under **Process** select **intent task**, click on

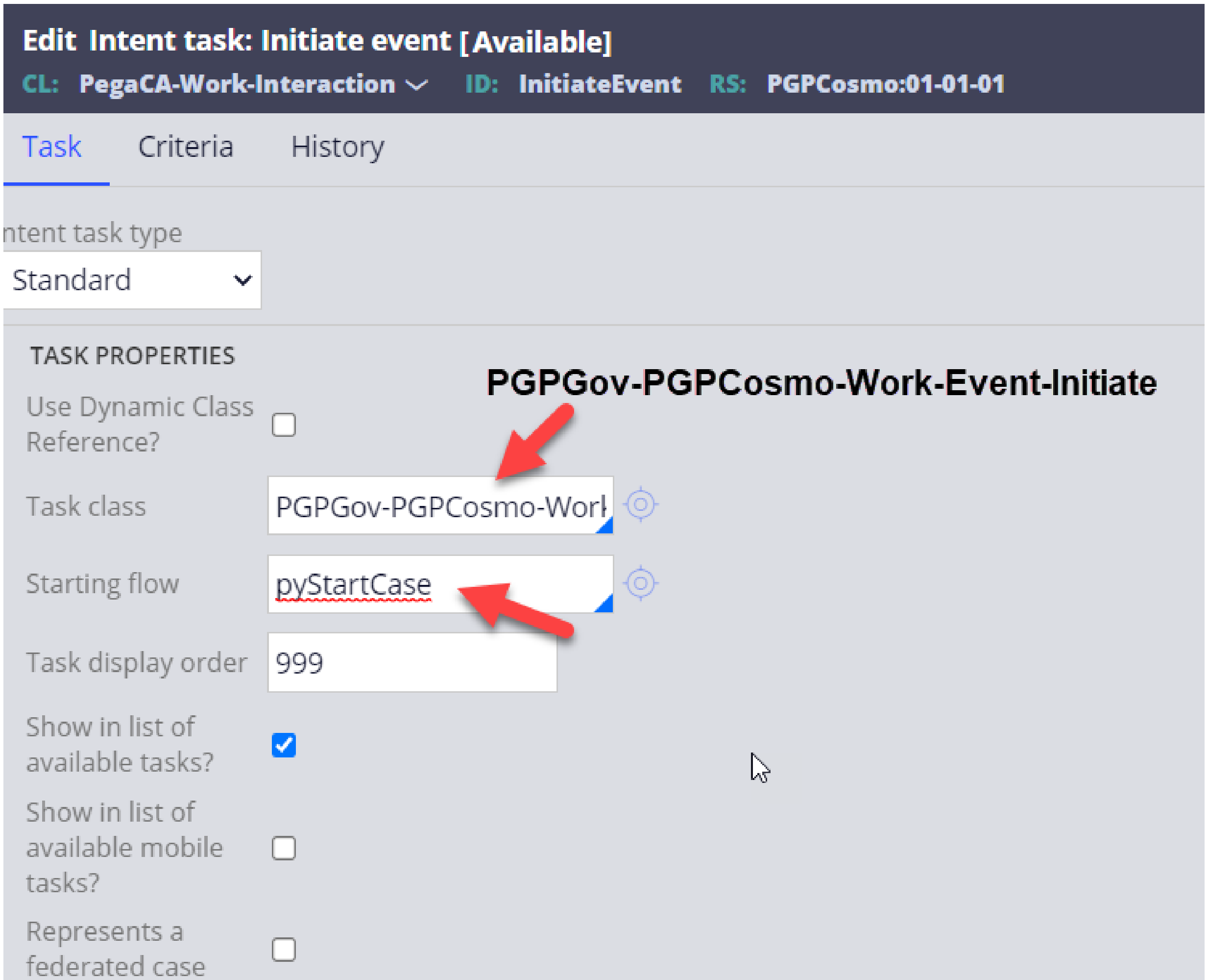
create and give apply to class as “PegaCA-Work-Interaction” to show intent task under General category.

Note: For new case types created, the Intent task will be created automatically.



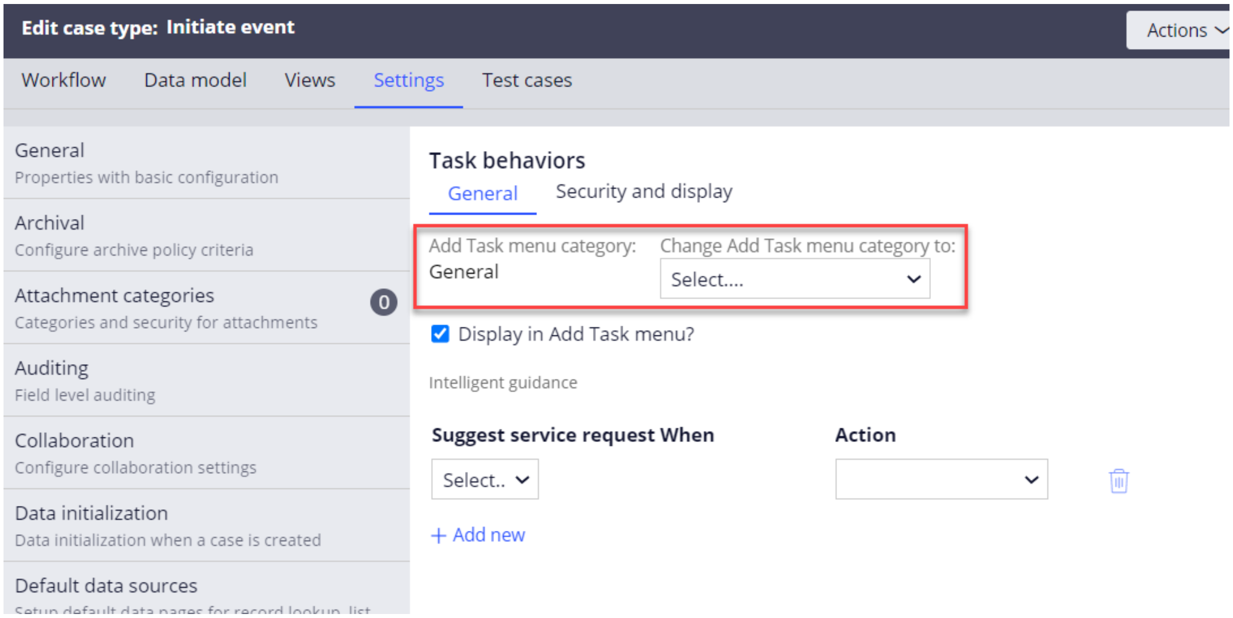
Create intent task

6. Mention the case type’s class in Task class field and starting flow as below and save it.



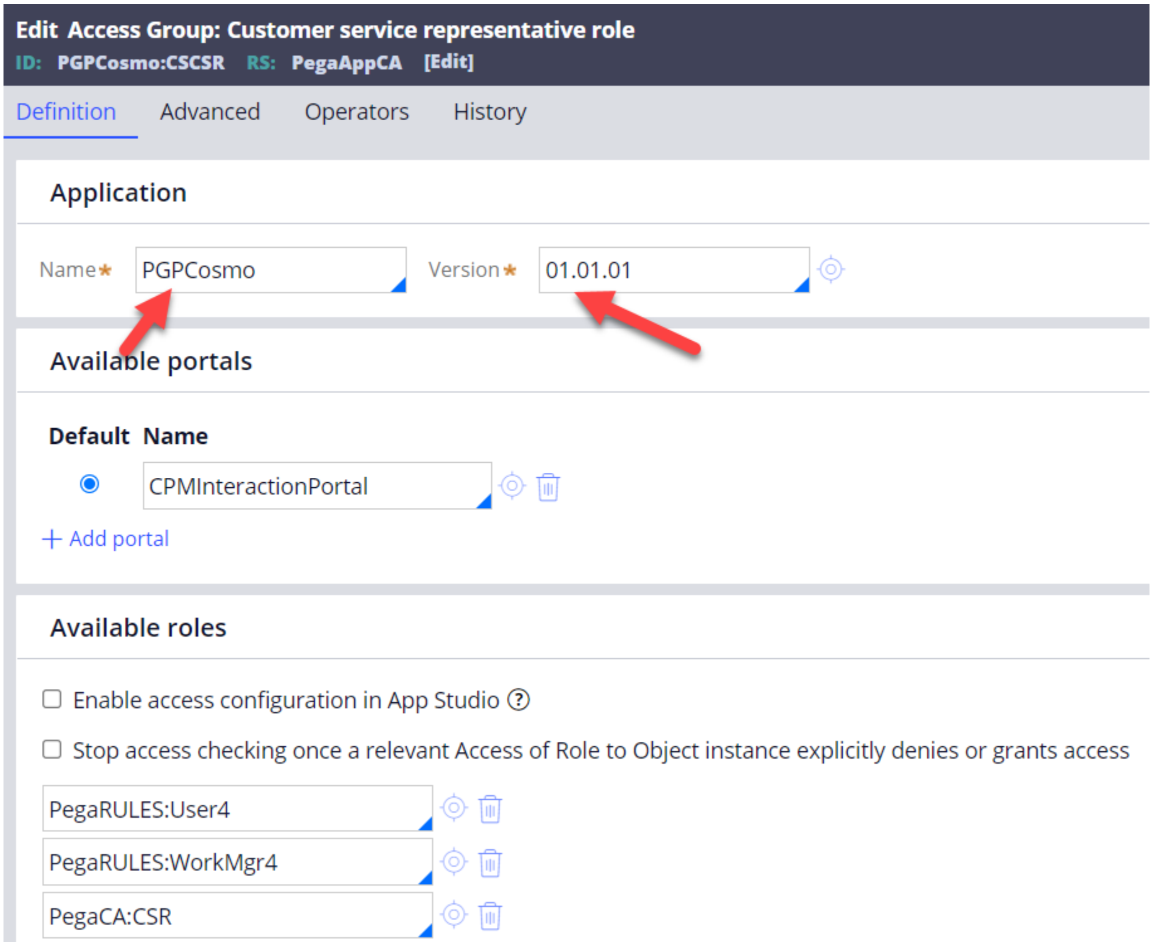
Initiate event

7. For new case types that are created after updating the application record, intent tasks get created automatically under Account category. To change the category under which the intent task to be displayed, From App Studio, from Case types explorer, open the case type, click on settings tab, Go to Task behaviours and change the category.



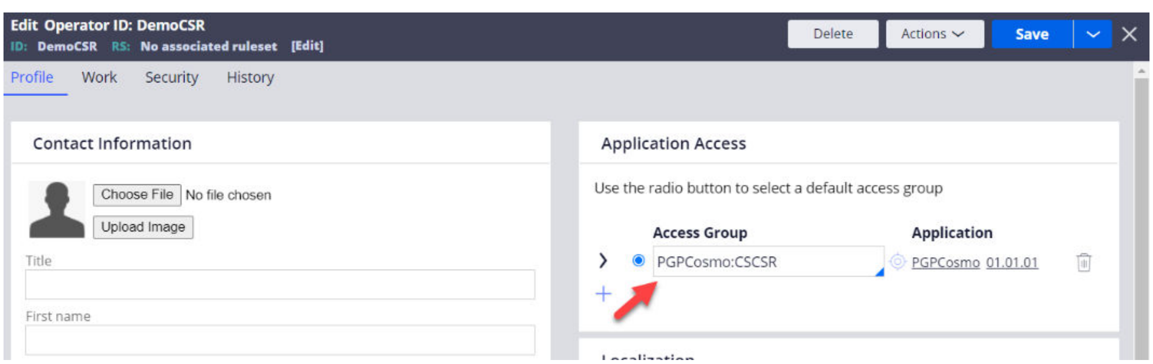
Initiate event- edit case type

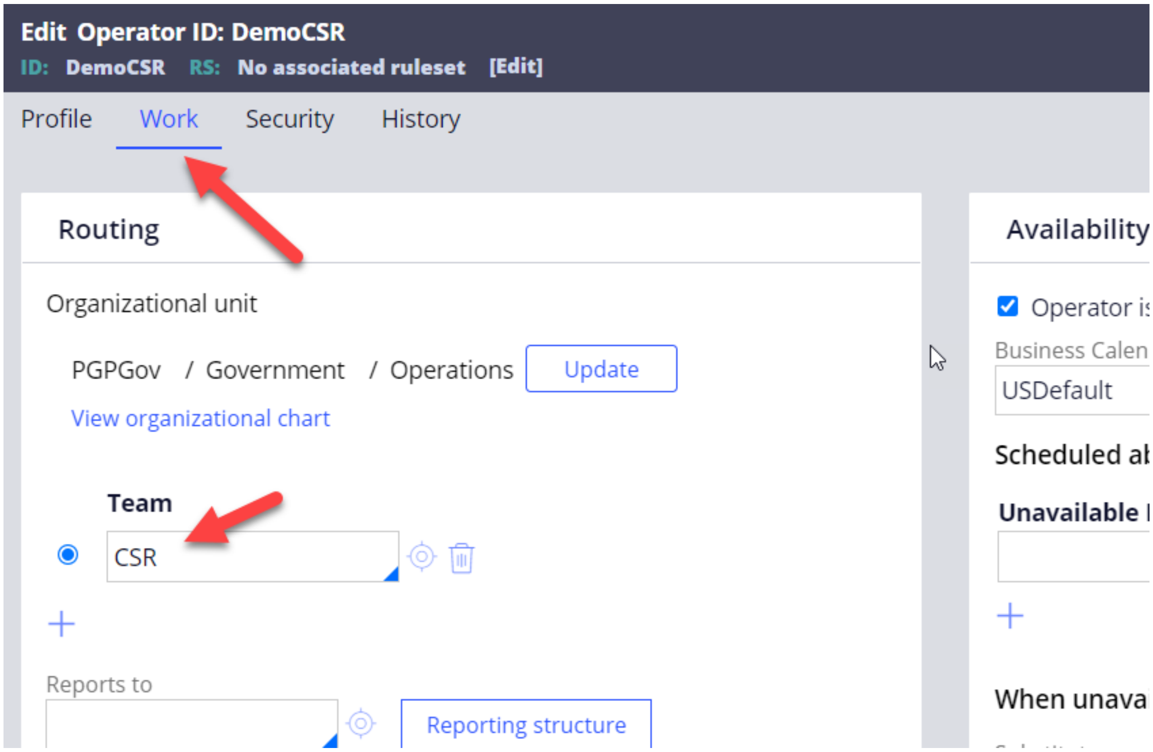
8. Creation of access groups
    a. Search for CSCSR access group and save as with a new name and mention your application in the application field as shown below.



Edit access group

9. Creation of new operator with created access group:
    a. Go to records explorer, under organization select Operator ID. Click on Create.
    b. Add above created access group to the operator as shown below and under work tab have team as "CSR" and save.

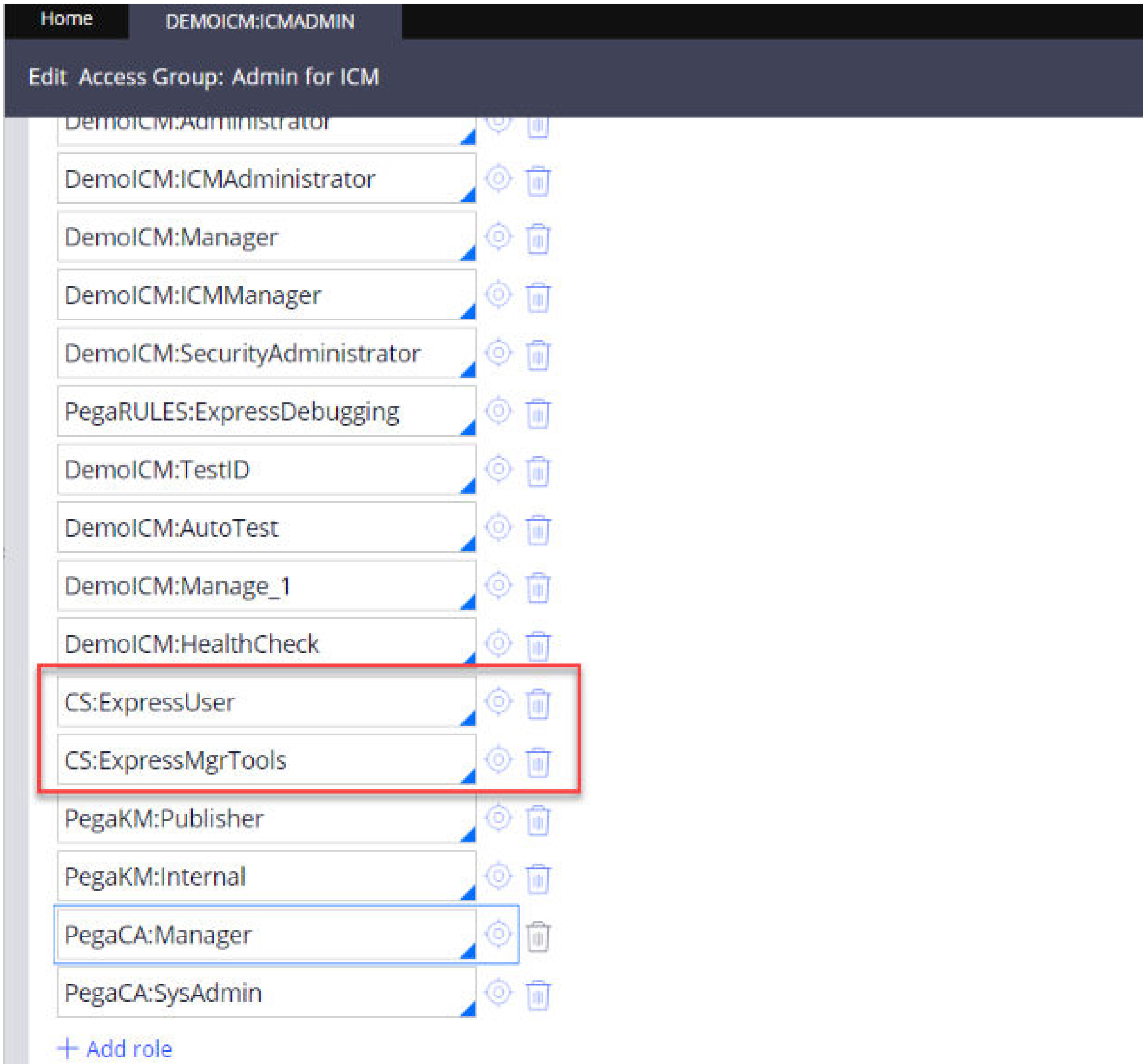




Work tab with team details

Edit operator - application access

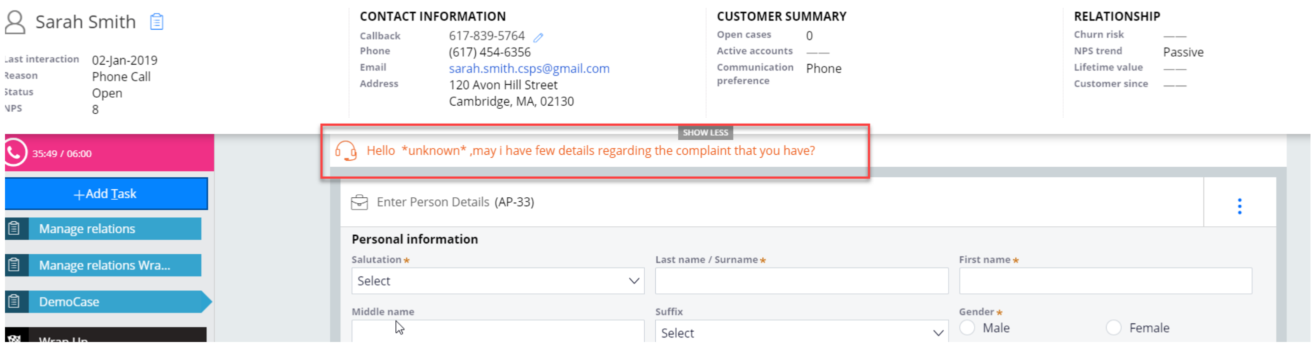
10. Repeat steps 8,9 for other access groups CSBOManager, CSBOUser, CSManager if required.
11. To enable the use of App studio, add CS:ExpressMgrTools, CS:ExpressUser roles to the admin access group.



Adding roles to App studio

Appendix B: Integrating industry applications with Pega Customer Service

The Pega Customer Service (CS) product offers features needed to build typical customer service representative (CSR) call-center support applications. CS provides a CSR/Operator conversational dialogs woven together with service tasks (case types) presented through an intent-driven user interface called the Interaction Driver.



Interaction driver

With no additional development a CS process can invoke any case type available in the application rule stack. Given a specific case type, CS will:

- Call the rule-resolved pyStartDefault activity for the specified case type's work class
- Pass process control to the resulting flow
- Receive process control when that flow ends

If the case type invoked in this way is a descendant of main CS case type ancestor class PegaCA-Work, then the flow UI will present the Interaction Driver, which is embedded in the default CS harnesses, along with any dialogs and tasks associated with the case type. However, if the case type does not have an ancestor of PegaCA-Work, For example, is from an underlying Built-On application, then some development effort will be required to extend the benefits of the Interaction Driver to those underlying Built-On case types.

The CS Interaction Driver is implemented as a customization to standard Pega harnesses. The key components are:

1. The PegaCA-Work sections CPMPerformIncludes and CPMPerformIncludesTasks which implement the Interaction Driver User Interface. These sections are included in the following CS harnesses:
    - New
    - Perform, PerformScreenFlow
    - TabbedScreenFlow, TabbedScreenFlow7

- TreeNavigation7

2. The PegaCA-Work activity NewDefaults which manages the initialization of the Interaction Driver and Dialog data structures.
3. The PegaCA-Work activity PerformDefaults which manages the list of case types in the Interaction Driver's task area.
4. CS Service Tasks.
5. CS Scripted Dialogs associated with steps in a case flow.

- **Case study: Extending Pega Government Platform with Pega Customer Service**

Case study: Extending Pega Government Platform with Pega Customer Service

The following tutorial will create a new Customer Service Implementation stack that extends the PGP Complaints application fully supporting the CS Interaction Driver in the underlying Built-On application's case types.

1. Create a new CS Implementation layer using the New Application wizard.
2. Edit the new application to include PGPComplaints in the list of Built-On applications.
3. Override the Perform and Confirm harnesses for the PGPComplaints case types in the new implementation layer.
4. Override the NewDefaults and PerformDefaults activities for the PGPComplaints case types in the new implementation layer.
5. Override the DPLoadContact activity for the CS Contact list in the new implementation layer and modify it to populate the CS AppContact page with the values from the PGP Complaints D_Person data page (Pass the Parameter ContactId to Data page param ID).
6. Override the LoadOptionMapList data transform in the new implementation layer and modify it to load option pairs for PGP drop-down lists from the appropriate implementation layer data page.

7. Override the PegaPS-Data-Context-Application D_AppContext data page (dynamic class referencing) in the new implementation layer with the D_AppContext from the new CS implementation layer.
8. Add CS appropriate CS Dialogs and associate them with PGPComplaint case types.

Appendix C: Mobile strategy

This section is intended for Pega Government Platform (PGP) developers designing mobile and mobile offline applications in Pega '23 using Pega Government Platform '23.

- **Pega Mobile overview**
- **Pega Government Platform Mobile**
- **Mobile offline**
- **Changes to mobile offline**
- **Changes to Pega Government Platform features**
- **Pega JavaScript API**

Pega Mobile overview

Provides an overview of Pega Mobile.

Mobile solutions

Mobile solutions provide government developers with several features and scenarios that help develop and deploy mobile apps to suit different businesses. Professionals and citizen developers can work in the model and take advantage of these features to create a modern mobile experience.

With low-code authoring, you can create a mobile channel for your application and effectively configure the content of the app in the model. For more information, see Mobile solutions.

Pega 8 Mobile overview

Pega provides four mobile deployment models: Device Browser, Pega Mobile Preview (previously Pega Mobile Express), Pega Mobile Deployment Kit, and Custom Mobile App.

Device Browser

Pega web applications built with responsive UI can be accessed from any device, for example, any tablet or any smartphone, using the device's native web browser, such as Google Chrome, Apple Safari, Microsoft Edge, and so on. No app store or developer licensing accounts are needed to follow this model.

Pega Mobile review

For testing purposes, Pega provides the Pega Mobile Preview app available as a free registered download from the Google Play Store for Android, or from the App Store for iOS (See also Pega Mobile Express). The Pega Mobile Preview app is a generalized Pega application launcher that takes the place of a web browser providing application access to device services like GPS and Camera with configurable security controls that a browser-based interaction does not have.

Pega Mobile Deployment kit

After the testing is complete, Pega can generate an application-specific mobile deployment kit much like Pega Mobile Preview, but custom tailored to the specific application channel and target platform. This allows the customer to have complete control over kit distribution.

Custom Mobile App with Pega Connect SDK

Experienced mobile application authors can build completely custom mobile apps and enable them to interact with Pega via the Pega Mobile SDK. For more information, see Mobile features overview.

Mobile Offline

Offline support ensures that key work scenarios are available to your users when they work in the field or in situations with limited or no connectivity.

The following scenarios are available as offline support for your application

Field workers support
: Maintain business continuity and assist users with specific offline tasks.

Data collection
: Collect data in the form of a questionnaire.

Data always available
: Provide field workers with offline data catalogs that are necessary to perform their tasks, such as offline catalogs of addresses or parts.

Case attachments
: Use attachments in cases, such as videos or PDFs that are seamlessly available in offline mode. Mobile users can also add new attachments to cases and ensure that these attachments are available to other users when the app synchronizes with the server.

Pega Government Platform Mobile

Describes how Pega Government Platform (PGP) has been configured to support Pega Mobile applications.

Business Issue
: Government customer requirements for applications include deployment to mobile devices like tablets and cell phones.

PGP solution

In PGP 8.x all components have been enabled for mobile operation and feature a responsive UI that adjusts automatically to different screen sizes and input devices.

Customer use

Application case types built in App Studio automatically benefit from the mobile-aware responsive UI.

Mobile offline

Describes how Pega Government Platform (PGP) has been configured to support Pega Mobile applications.

Business issue

Government customer requirements for mobile applications include operation in conditions where mobile devices move in and out of areas with no cellular or wireless reception.

PGP Solution

In PGP, the following core components have been enabled for mobile offline operation.

- Capture interview
- Conduct assessment (simple survey questions only)
- Activity plan task
- Add Evidence

Mobile applications built with these components will automatically store data when offline conditions are encountered and synchronize the stored data with server when offline condition is resolved.

More PGP components are enabled for offline operation in future releases.

Customer use

Customers who wish to use the offline capabilities in PGP implementations must follow three steps.

1. Enable *Offline* support in the Mobile Channel Settings.
2. Create and populate an *Offline Configuration* rule.
3. Develop mobile application case types in App Studio using one or more of the PGP Mobile Offline enabled components.

Enabling offline support

Enable offline support to advance cases even if the users' devices are not connected with the server.

1. Navigate to the mobile channel definition for your application.
2. Click the **Configuration** tab, and then click the **Offline** category.
3. Select the **Enable offline support** check box.
4. Click the **Add case type** link and select the application case types enabled for use in the offline mode.
5. Click **Submit**, and then click **Save**.

For more information, see Setting up mobile apps.

Creating an offline configuration rule

Manage data synchronization as a device transitions between online and offline modes and identify data elements for Pega to explicitly manage. The Offline Configuration rule (Rule-Config-Offline) allows a developer to list application data elements that are managed offline.

To create or edit an Offline Configuration rule, navigate to Configure > Mobile > Offline Configuration.

In Pega, you can manage the following data resources offline.

- Data Pages

- Field Values
- Data Transforms
- Validate rules
- When rules
- Decision rules
- Decision Tree rules

For an example of an Offline Configuration rule, review the one provided for ICM: PGPICM.

For more information, see Working with offline-enabled mobile apps.

Develop offline case types

Customers can design and develop Pega Mobile Offline case types following the guidance provided by the Pega Community.

Changes to mobile offline

New offline configuration rule

PGP provides a PGP-specialized Offline Configuration rule template for ICM that manages mobile offline data synchronization on the ICM Mobile Channel for the channel, its portal, and Interview, Conduct Assessment, and Activity Plan Task components.

Allow list - Data pages

D_AppContext
D_ICMAppContext
D_OptionMapListAll
D_InterviewTemplateListAll
D_StatesListAll
D_ConfiguredCountryList
D_InvestigationListAll
D_SubjectListAll
D_AuthorizedInvestigations

D_Association_Editable

Field values

no field values

Data transforms

PegaPS-Work!InitializeInterview

PegaPS-Data-Interview!LoadInterviewNotes

PegaPS-Data-Address!SetStateLabel

PegaPS-Data-Interview!SetInterviewTitle

PegaPS-Work!ReassignAssessment

PegaPS-Work!PostAddInterview_Ext

Validation rules

no validate rules

when rules

Work-!pyCanDisplayAttachments

Work-!CanDisplayDocuments

Work-!pyHasAttachments

@baseclass!Never

Assign-!pzHasPrivilegeToClearAssignmentErrors

@baseclass!pzIsOfflineEnabled

PegaPS-Work!IsNotNewAndResolved

Decision Table rules

PegaPS-Data-Address!StateLabel

Decision Tree rules

no decision tree rules

Deny list - Excluded data pages

D_UITemplateMeta

D_pzClientStore_Item

- D_pzClientStore_Action
- D_pzClientStore_Category
- Declare_pyDisplay
- D_pzOfflineAttachmentList
- D_pzManageExpress

Delta-Sync Deny list - Excluded data pages

- D_QuestionOptions_Master
- D_QuestionOptions
- D_StartingFlows
- D_pzOfflineCaseAttachments
- D_pzSearchConfiguration
- D_pzOfflineSettings

Resources images and icons

- webwb/zblankimage.gif
- images/busyIndicator.gif
- images/pyEmailThumbnail.svg
- images/pyURLThumbnail.svg
- images/pyTextThumbnail.svg
- images/pyPDFThumbnail.svg
- images/pyWordThumbnail.svg
- images/pyPPTThumbnail.svg
- images/pyExcelThumbnail.svg
- images/pyImageThumbnail.svg
- pyDefaultFileThumbnail.svg
- webwb/webwb/caret-down.svg
- webwb/webwb/pycheckboxes.png
- webwb/webwb/calendar-time-date.svg
- webwb/pymodal_mask_img.png
- webwb/requiredstar.gif
- webwb/pzerror_icon.png
- webwb/py-calendar-icon.svg

webwb/pymodal_mask_img.png
webwb/requiredstar.gif
webwb/pzerror_icon.png
webwb/webwb/caret-down.svg
webwb/py-calendar-icon
webwb/webwb/pycheckboxes.png
webwb/webwb/calendar-time-date.svg
webwb/pyConnected.svg
webwb/zblankimage.gif
images/busyIndicator.gif
images/pyEmailThumbnail.svg
images/pyURLThumbnail.svg
images/pyTextThumbnail.svg
images/pyPDFThumbnail.svg
images/pyWordThumbnail.svg
images/pyPPTThumbnail.svg
images/pyExcelThumbnail.svg
images/pyImageThumbnail.svg
images/pyDefaultFileThumbnail.svg
images/pzPegaIcon.ico
images/pzPegaIcon16.png
images/pzPegaIcon32.png

Fonts

webwb/webwb/pxfont-OpenSans-Bold.woff2
webwb/webwb/pxfont-OpenSans-BoldItalic.woff2
webwb/webwb/pxfont-OpenSans-ExtraBold.woff2
webwb/webwb/pxfont-OpenSans-ExtraBoldItalic.woff2
webwb/webwb/pxfont-OpenSans-Italic.woff2
webwb/webwb/pxfont-OpenSans-Light.woff2
webwb/webwb/pxfont-OpenSans-LightItalic.woff2
webwb/webwb/pxfont-OpenSans-Regular.woff2
webwb/webwb/pxfont-OpenSans-Semibold.woff2

webwb/webwb/pxfont-OpenSans-SemiboldItalic.woff2
webwb/pxfont-OpenSans-Bold.woff2
webwb/pxfont-OpenSans-BoldItalic.woff2
webwb/pxfont-OpenSans-ExtraBold.woff2
webwb/pxfont-OpenSans-ExtraBoldItalic.woff2
webwb/pxfont-OpenSans-Italic.woff2
webwb/pxfont-OpenSans-Light.woff2
webwb/pxfont-OpenSans-LightItalic.woff2
webwb/pxfont-OpenSans-Regular.woff2
webwb/pxfont-OpenSans-Semibold.woff2
webwb/pxfont-OpenSans-SemiboldItalic.woff2
webwb/uikit-icons.woff2

Locales Locale ID

no locales

For more information, see Working with offline-enabled mobile apps.

PGP Offline JavaScript support library

The *pyPega_UI_UserScripts_Offline* Static Content Bundle rule has been extended to include the *pega_pgp_utils.js* Text File rule, a PGP JavaScript library that facilitates some specialized PGP data management for offline scenarios.

The *pega_pgp_utils.js* JavaScript library contains functions that help manage data in the mobile device's data cache while in an offline state using the Pega *Client Cache API*.

Changes to Pega Government Platform features

Interview Component

The *InterviewInfo* Section rule was modified to call several of the JavaScript functions in *pega_pgp_utils.js*. In the Change Action for the Interview Template drop-down list, a Run Script was added to the Action Set to call the *LoadInterviewNotes()* function to retrieve the selected template from the mobile device's client cache and populate the *InterviewNotes* property when in an offline state.

Similarly for the No*nMandatoryWithCurrentLocation* Section rule, the Country dropdown calls the *setStateLabel()* function to populate the states for a selected country.

The *PersistInterview* Declare Trigger rule has been added to save an Interview instance during the data synchronization.

The *MoveCaseAttachments* Declare Trigger rule has been added to associate attachments collected while in an offline state with the Interview data instance.

Conduct Assessment Component

For ICM Assessment (Pega Survey), PGP overrides a Pega Survey extension Work-pyResolveSurvey Flow rule as PegaSP-Work.pyResolveSurvey and extends it to associate an Assessment to an Investigation or Subject.

Activity Plan Task case type

The *TaskInformation* Section rule has been modified to include the Pega *Work-.pyOfflineCaseAttachments* Section rule which conditionally displays in the place of the *PegaPS.ViewAttachments* Section rule when *pzIsOfflineEnabled* is true.

Pega JavaScript API

JavaScript APIs for offline-enabled mobile apps

https://docs.pega.com/bundle/platform/page/platform/mobile/javascript-api-offline-mobile-apps.html

Mobile Offline Data-Sync Architecture

https://agilestudio.pega.com/prweb/AgileStudio/app/agilestudio_/doc/DOC-6234

Hotfixes

This page lists the hotfixes that the Pega Government Platform application requires. This page also lists hotfixes required for the Pega Foundation for Government application, the Pega application superseded by the Pega Government Platform application.

To request a hotfix, go to My Support Portal. Click New request > For something I need and select Service request > Existing hot fix. Add and verify the hotfix details and click Finish.

Import each type of hotfix in the listed order during the Pega Government Platform or Pega Foundation for Government installation or upgrade:

- Apply **Pega Platform** hotfixes immediately after the Pega Platform installation or upgrade.
- Apply **Pega Government Platform** hotfixes just after you complete the application bundle import.

To see hotfix installation details, see the readme that is included in the hotfix.

- **Hotfixes for Pega Government Platform 8.x**
- **Hotfixes for Pega Government Platform 7.x**

Hotfixes for Pega Government Platform 8.x

- **Pega Government Platform 8.8**
- **Pega Government Platform 8.7**
- **Pega Government Platform 8.6**
- **Pega Government Platform 8.5**

- Pega Government Platform 8.4
- Pega Government Platform 8.3
- Pega Government Platform 8.2
- Pega Government Platform 8.1

Pega Government Platform 8.8

The following table lists the required **Pega Government Platform 8.8** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.8	HFIX-A668	Rule availability change for SaveObject activity.
	HFix-85100	BAC pre-registration for activities. **Note:** This hotfix has a prerequisite of Pega Platform patch 8.8.1 and Pega Government Platform patch 8.8.1.

Pega Government Platform 8.7

The following table lists the required **Pega Government Platform 8.7** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.7	HFix-84901	BAC Pre Registration for activities **Note:** This hotfix has a prerequisite of platform hotfix HFIX-84702.

Pega Government Platform 8.6

The following table lists the required **Pega Government Platform 8.6** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.6	HFix-84878	BAC Pre Registration for activities **Note:** This hotfix has a prerequisite of platform 8.6.6 patch .
	HFix-82530	Enhancement- App Factory Support for PGP 8.6. Provided Authors Access group for both

Pega Platform version	Hotfix number	Observed behavior
		PegaGPCosmos and PGPICMCosmos apps.
	HFix-80896	Google key configured as default value in parameters.
	HFix-80827	The following issues are addressed: • SetObjClass data transform throwing error from @baseclass. • ROI Generation in Cosmos investigation does not pull some new properties. • Work and Data attachments do not prompt correct error in UI Kit. • Support to only RTE and local file for Data attachments in Cosmos. • Removal of default param value (Google key) from the data page parameters. • Subject search issues in Cosmos.

Pega Platform version	Hotfix number	Observed behavior
		• Global context fixes for images. • Merge attribute for business label issue for *Ownership type* property.

Pega Government Platform 8.5

The following table lists the required **Pega Government Platform 8.5** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.5.1	HFix-80897	• Google key configured as default value in parameters • Global context issues for Image Prefix
	HFix-80828	No error messages while attaching a file to data attachments in PGP UI Kit.
	HFix-80760	Unexpected error from pzSaveAttachments.
	HFix-69879	Browser hangs when browser refresh is used while user is in Entity home pages in PGP Cosmos application.

Pega Platform version	Hotfix number	Observed behavior
	HFix-70536	After user updated the entity details, user details are not refreshed in Entity view.
	HFix-80010	Delegated rules are not getting localized.
8.5	HFix-84884	BAC Pre Registration for activities. **Note:** This hotfix has a prerequisite of platform hotfix HFix-84421.

Pega Government Platform 8.4

The following table lists the required **Pega Government Platform 8.4** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.4.3	HFix-68611	The offline packaging is picking the wrong section rule `pyAttachmentScreen`. It is picking the rule from the Theme-Clarity application. The Theme-Clarity should be removed from the PGP built-on apps.

Pega Platform version	Hotfix number	Observed behavior
	HFix-70417	Unable to resolve the case after opening the case document in inline mode.
8.4	HFix-80895	Google key configured as default value in parameters.
	HFix-67465	SEC update – B20 (PGP 8.4 on Pega Platform 8.4.3)
	HFix-65249	File upload to the external repositories failing with Null Pointer Exception.
	HFix-63547	• The Participants parameter configuration is missing for AddPlan flow rule. • Creating a new entity from the Manage association is failing with PegaCRM as built on. • The activity plan option from Mobile toolkit is invoking the configuration page instead of invoking the plan.

Pega Platform version	Hotfix number	Observed behavior
		• PegaGP ruleset was shipped with unlocked ruleset version.

Pega Government Platform 8.3

The following table lists the required **Pega Government Platform 8.3** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.3.4	HFix-67402	SEC update – B20 (PGP 8.3 on Pega Platform 8.3.4)
8.3	HFix-57961	Changes are required to address the following issues: • Visualize in Household view is not working as the ObjectType property was set. • Opening cases from open link of the nodes of the Visualize diagram is not working, for the cases in the implementation layer. • The Confirm harness, after the external assignment has been performed is showing Investigation case

Pega Platform version	Hotfix number	Observed behavior
		information - For security reasons we should not show any case information. • The data layer attachments are not being saved to CMIS repositories (Fix for SR-D47517 of PGP 8.1).

Pega Government Platform 8.2

The following table lists the required **Pega Government Platform 8.2** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.2.8	HFix-68102	SEC update – B20 (PGP 8.2 on Pega Platform 8.2.8)
8.2	HFix-69905	Removing Unique ID generation for person Image if ID doesn't exist while retrieving the person details.

Pega Government Platform 8.1

The following table lists the required **Pega Government Platform 8.1** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.1.9	HFix-67795	SEC update – B20 (PGP 8.1 on Pega Platform 8.1.9)

Pega Platform version	Hotfix number	Observed behavior
8.1	HFix-57445	Files not uploading to S3 bucket using PGP framework.
	HFix-48238	Changes are required to address the following issues: • Visualize in PGP layer is showing the Subject cases. • While uploading image, the selection of cropped part is not working. • PegaPS ruleset was unlocked. • Upload image functionality for Person or Vehicle is not available in Implementation layers. • Reporting ruleset missing for ICMManagers. • Unable to publishing private message in Pulse section. • Procurement Admin's accessgroup missing the security role.

Hotfixes for Pega Government Platform 7.x

- Pega Government Platform 7.4
- Pega Government Platform 7.31
- Pega Government Platform 7.21
- Pega Government Platform 7.16

Pega Government Platform 7.4

The following table lists required **Pega Platform** hotfixes for Pega Government Platform 7.4.

Pega Platform version	Hotfix number	Observed behavior
7.4	HFix-46018	Unique IDs are not getting generated on checkbox, if they configured on page list/ page group property.
	HFix-45746	The pyLabel property max length issue in pyAttachApprovalEmail activity.

The following table lists required required **Pega Government Platform 7.4** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
7.4	HFix-67796	SEC Update - B20 (PGP 7.4 on Pega Platform 7.4)
	HFix-65487	The entries in the CommList pagelist property were not

Pega Platform version	Hotfix number	Observed behavior
		mapped correctly to the Email and Phone.
	HFix-46678	Changes are required to address the following issues: • Unable to validate the participants while editing the Interview. • Previous case owner unable to view the investigation details once the ownership is accepted by the new owner. • Unable to delete the multi-line case notes. • Investigation address map is not loading because of the case note address issue. • The end user is able to open the Entity view page from the confirm screen through the link displayed. • Procurements case status is not being updated on rejecting the Review plan.

Pega Platform version	Hotfix number	Observed behavior
		• Application building on ICM are failing because the ICMAdmin accessgorup is referring to PegaDeveloper ruleset in production rulesets. • Issues related to Manage associations fixed. • CustomAudit section is not visible in Subject case on Mobile device.

Pega Government Platform 7.31

The following table lists required **Pega Government Platform 7.31** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
8.1	HFix-47979	Changes are required to address the following issues: • In PGP Selfservice portal, the label and text fields of the username and passwords are overlapping.

Pega Platform version	Hotfix number	Observed behavior
		• Branch details are not being displayed in the Business view page.
7.4	HFix-67213	The entries in the CommList pagelist property were not mapped correctly to the Email and Phone.
7.3	HFix-39330	Removing the length restriction in PGP data model.
	HFix-36427	Broken attachment icons in the submit bid case.
	HFix-41369	Missing empty hotfix ruleset versions for all the apps.
	HFix-41488	Hotfix for upgrade PGP 7.31 from UI-Kit 9 to UI-Kit 10.

Pega Government Platform 7.21

The following table lists required **Pega Government Platform 7.21** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
7.3	HFix-35637	Delete Document Page error is displayed while logging into the system.
	HFix-29562	Password mismatch error while creating account.
7.2.2	HFix-29562	Password mismatch error while creating account.

Pega Platform version	Hotfix number	Observed behavior
7.2.1	HFix-34240	Saving the PegaPS-Data items is not working as expected.
	HFix-30345	Mandatory field validations are thrown when user clicks on save.

Pega Government Platform 7.16

The following table lists required **Pega Foundation for Government 7.16** hotfixes.

Pega Platform version	Hotfix number	Observed behavior
7.3.1	HFix-35635	Changes are required to address the following issues: • Opening a case from search complaint encounters an error. • Logging out from the PFG Operator page encounters an error page. • The Create Operator link is not working. • Users cannot view the Add business button in the Create operator page.

Pega Platform version	Hotfix number	Observed behavior
	HFix-30967	Error in the Login screen after clicking on cancel button.
	HFix-29612	Password mismatch error while creating operator.
	HFix-28036	Delete Document Page error is displayed while logging into the system.
7.3	HFix-35635	Changes are required to address the following issues: • Opening a case from search complaint encounters an error. • Logging out from the PFG Operator page encounters an error page. • The Create Operator link is not working. • Users cannot view the Add business button in the Create operator page.
	HFix-32809	Support for Pega Certification and Licensing for Government 7.21 release.

Pega Platform version	Hotfix number	Observed behavior
	HFix-30967	Error in the Login screen after clicking on cancel button.
	HFix-29612	Password mismatch error while creating operator.
	HFix-28036	Delete Document Page error is displayed while logging into the system.
7.2.2	HFix-32809	Support for Pega Certification and Licensing for Government 7.21 release.
	HFix-30967	Error in the Login screen after clicking on cancel button.
	HFix-29612	Password mismatch error while creating operator.
7.2.1	HFix-30967	Error in the Login screen after clicking on cancel button.
	HFix-28036	Delete Document Page error is displayed while logging into the system.
7.2	HFix-30967	Error in the Login screen after clicking on cancel button.

Resources

Find supplemental about Pega Government Platform.

- **Pega Certification and Licensing for Government hotfixes**

Pega Certification and Licensing for Government hotfixes

The following tables list required hotfixes the Pega Certification and Licensing for Government application requires. To request a hotfix, go to My Support Portal. Click New request > For something I need and select Service request > Existing hot fix. Add and verify the hotfix details and click Finish.

Import each type of hotfix in the listed order during the Pega Government Platform or Pega Foundation for Government installation or upgrade:

- Apply **Pega Platform** hotfixes immediately after the Pega Platform installation or upgrade.
- Apply **Pega Certification and Licensing for Government** hotfixes just after you complete the application bundle import.

To see hotfix installation details, see the readme that is included in the hotfix.

- **Hotfixes for Pega Certification and Licensing for Government 8.x**
- **Hotfixes for Pega Certification and Licensing for Government 7.x**

Hotfixes for Pega Certification and Licensing for Government 8.x

Pega Certification and Licensing for Government 8.5

The following table lists the required **Pega Certification and Licensing for Government 8.5** hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
8.5.3	HFix-81747	Addressed the issues with FetchActiveLicenseCount report.Hotfix is provided to update the column case to match the case defined on external mapping for the classes.

Pega Certification and Licensing for Government 8.4

The following table lists the required **Pega Certification and Licensing for Government 8.4** hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
8.4	HFix-67424	In Pega Certification and Licensing for Government 8.4, security has been enhanced on a number of rules by the addition of an existing privilege “AllFlows”.

Pega Certification and Licensing for Government 8.3

The following table lists the required **Pega Certification and Licensing for Government 8.3** hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
8.3	HFix-67641	In Pega Certification and Licensing for Government 8.3, security has been enhanced on a number of rules by the addition of an existing privilege “AllFlows”.

Hotfixes for Pega Certification and Licensing for Government 7.x

Pega Certification and Licensing for Government 7.31

The following table lists required **Pega Certification and Licensing for Government 7.31** hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
8.1	HFix-49065	Not able to cancel the adjudication work object when it is created via summon case.
	HFix-47984	Changes are required to address the following issues: • Status fail screen is shown on click of Create Operator link on the login screen. • Username and password text overlaps with the text input

Pega Platform Version	Hotfix Number	Observed Behavior
		fields on the login screen. • Click on Finish button in Apply for License process does not trigger an action.
7.4	HFix-49065	Not able to cancel the adjudication work object when it is created via summon case.
	HFix-43465	Changes are required to address the following issues: • Processing error while creating 'Apply for exam' flow. • Create Operator link is not visible properly.
7.3.1	HFix-49065	Not able to cancel the adjudication work object when it is created via summon case.
	HFix-47490	Next Category button is displayed even when no categories exist.
	HFix-46670	The below properties are missing for the Data page D_CitizenProfile: Internal

Pega Platform Version	Hotfix Number	Observed Behavior
		Notes, Personal Address Type, Person Citizenship Text,State Residence Indicator.
	HFix-46482	Error occurs upon running the D_StateList datapage.
	HFix-46034	Property validation errors are observed when testing the database connection for the PegaGov-Data-CitizenProfile class.
	HFix-43465	Changes are required to address the following issues: • Processing error while creating 'Apply for exam' flow. • Create Operator link is not visible properly.

Pega Certification and Licensing for Government 7.21.01

The following table lists required **Pega Certification and Licensing for Government 7.21.01** hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
7.3.1	HFix-40867	Address section misaligned when using OOTB entity address section.

Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-32809	Support for Pega Certification and Licensing for Government 7.21 release.
	HFix-35628	Changes are required to address the following issues: • The Create Operator page user interface is not working as expected. • Logging out from the PFG Operator page encounters an error page. • The Post-Suspension page contains a correspondence issue. • The Edit-Suspension process does not show correspondence. • Opening a complaint case from search complaint encounters an error. • The return to login page screen has a blank display.

Pega Platform Version	Hotfix Number	Observed Behavior
		• Users cannot view the Add business button in the Create operator page.
7.3	HFix-40867	Address section misaligned when using OOTB entity address section.
	HFix-32809	Support for Pega Certification and Licensing for Government 7.21 release.
	HFix-35628	Changes are required to address the following issues: • The Create Operator page user interface is not working as expected. • Logging out from the PFG Operator page encounters an error page. • The Post-Suspension page contains a correspondence issue. • The Edit-Suspension process does not show correspondence.

Pega Platform Version	Hotfix Number	Observed Behavior
		• Opening a complaint case from search complaint encounters an error. • The return to login page screen has a blank display. • Users cannot view the Add business button in the Create operator page.
7.2.2	HFix-40867	Address section misaligned when using OOTB entity address section.

Pega Certification and Licensing for Government 7.15.01

The following table lists the required **Pega Platform** hotfixes for **Pega Certification and Licensing for Government** 7.15.01.

Pega Platform Version	Hotfix Number	Observed Behavior
7.1.9	DL-50540, HFix-24020	Not able to Lock and save the ruleset.
	DL-50541, HFix-24403	Accessibilty Issue: Confirm Message is not the first message.

The following table lists the required Pega Certification and Licensing for Government 7.15.01 hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
7.2.2	HFix-26659	Need to lock the existing two open ruleset versions.
	HFix-27191	Upgrades to Pega Certification and Licensing for Government 7.15 introduce incorrect database table name.
	HFix-27532	Expertise section is not reachable for a constituent.
	HFix-29612	Password mismatch error while creating operator.
	HFix-29858	Missing class key for Address and CommOptions classes.
7.2.1	HFix-25503	A voided License is not displayed as withdrawn for Pega Certification and Licensing for Government.
	HFix-25625	No products are displayed for New-BEIssueLicense flow, when "Marine Harvesting" category is selected.
	HFix-25889	Incorrect suspension type displayed for Summons Admin Process.
	HFix-26074	Error came up after payment is submitted in Renew License flow.

Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-26659	Need to lock the existing two open ruleset versions.
	HFix-27191	Upgrades to Pega Certification and Licensing for Government 7.15 introduce incorrect database table name.
	HFix-27532	Expertise section is not reachable for a constituent.
	HFix-29858	Missing class key for Address and CommOptions classes.
7.2	HFix-25503	A voided License is not displayed as withdrawn for Pega Certification and Licensing for Government.
	HFix-25625	No products are displayed for New-BEIssueLicense flow, when "Marine Harvesting" category is selected.
	HFix-25889	Incorrect suspension type displayed for Summons Admin Process.
	HFix-26074	Error came up after payment is submitted in Renew License flow.
	HFix-26659	Need to lock the existing two open ruleset versions.

Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-27191	Upgrades to Pega Certification and Licensing for Government 7.15 introduce incorrect database table name.
	HFix-27532	Expertise section is not reachable for a constituent.
7.1.9	HFix-26659	Need to lock the existing two open ruleset versions.
	HFix-27191	Upgrades to Pega Certification and Licensing for Government 7.15 introduce incorrect database table name.
	HFix-27532	Expertise section is not reachable for a constituent.

Pega Certification and Licensing for Government 7.13.01

The following table lists required **Pega Certification and Licensing for Government** 7.13.01 hotfixes.

Pega Platform Version	Hotfix Number	Observed Behavior
7.1.5	HFix-27808	Incompatible datatypes exist with Integration layer.
	HFix-29811	Additional rules required to support missing default value of FishingTime property in CLF framework.

Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-30129	Two map rules required for FishingTime property in CLF framework.