Mastering Pega DX API V2: Streamlining Case Management with Smarter Integrations

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CONTENTS

1. Introduction
2. What is Pega DX API V2?
3. Setting Up Pega DX API V2
4. Update Cases

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Introduction

Pega is a robust platform for case management, automation, and business process management. With **Pega's DX API V2**, developers can seamlessly integrate external systems, enabling them to create, update, and manage cases programmatically.

This API offers a **RESTful interface**, simplifying interactions with Pega's case management system. It streamlines automation and external integrations, making it easier to connect Pega with other platforms in just a few steps.

What is Pega DX API V2?

Pega DX API V2 (Digital Experience API Version 2) is a **RESTful API** that enables developers to **create, retrieve, and update cases,** as well as interact with data within Pega. Designed for seamless integration with third-party applications, it streamlines communication and automates processes, making Pega more adaptable to external systems.

Create Case: Pega offers a **powerful Case Management API** that allows developers to programmatically **create, manage, and update cases.** One of its key capabilities is **case creation** through Pega's **RESTful API**, enabling seamless automation and integration with external systems.

In Pega, a **case** is an instance of a work item that is created and processed through various steps until completion. When creating a case via the Pega OOTB API, you interact with the /cases endpoint.

End point URL:

https:// <your-pega-instance>/api/v2/cases

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Setting Up Pega DX API V2

Before creating cases, you need to set up and configure Pega DX API V2 in your application:

Ensure API Access

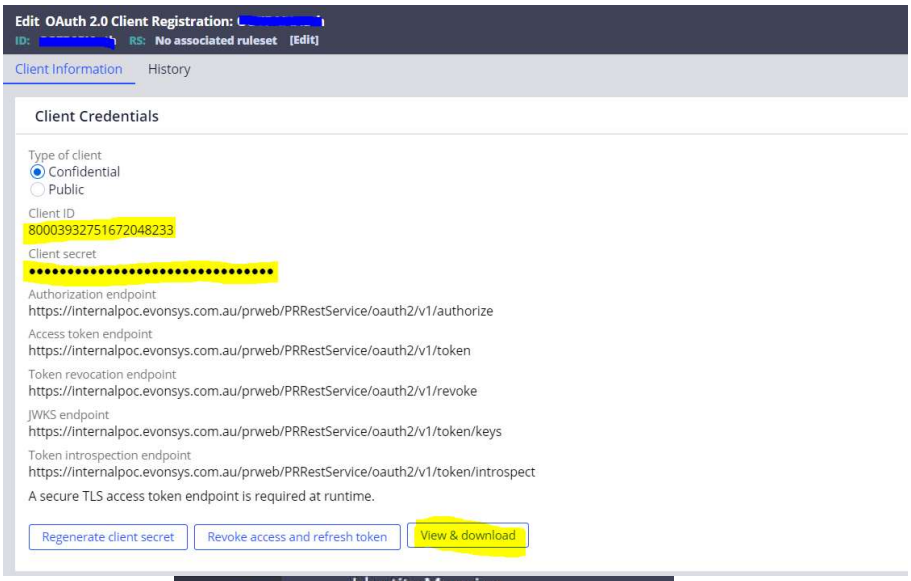
Verify that you have the necessary permissions to access Pega DX API V2 endpoints.

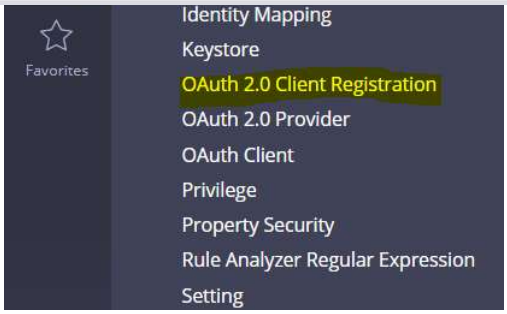
Authenticate with OAuth 2.0

Configure a client ID and client secret to generate an access token for API requests.

Create an OAuth 2.0 Client Registration Rule

This security rule is required to authenticate API requests and manage access control.





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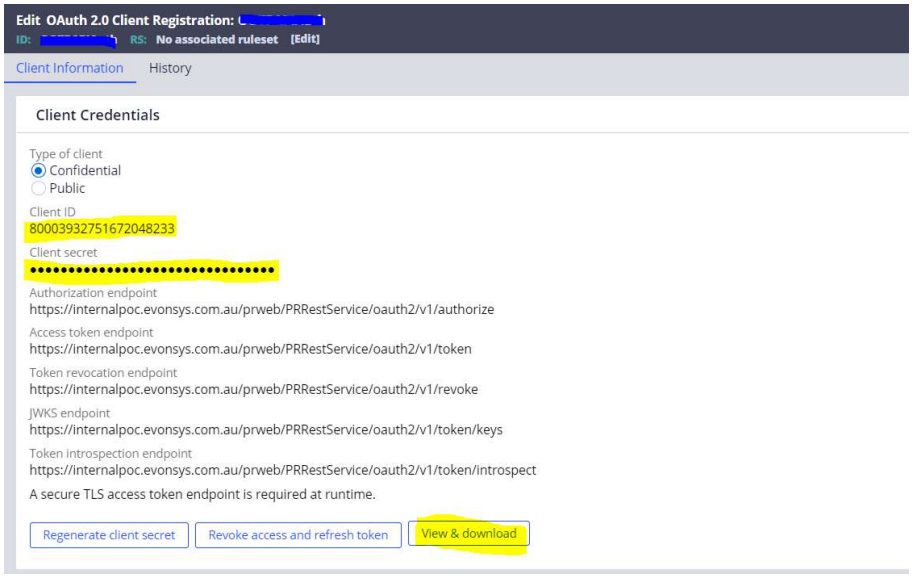

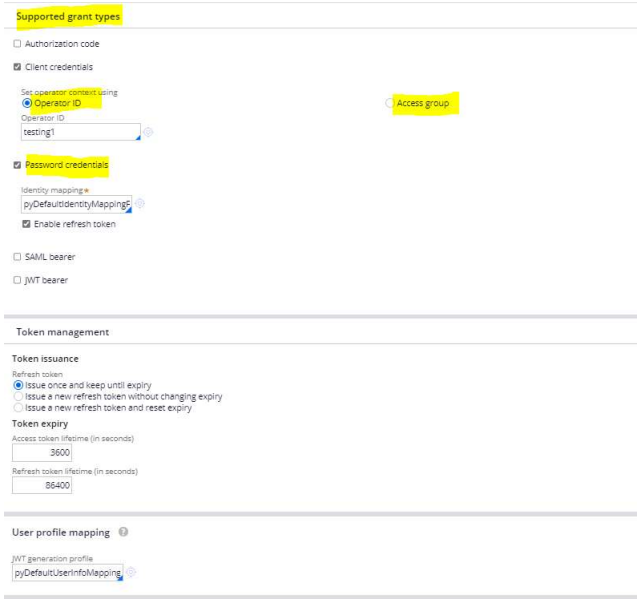

By clicking **View and Download**, you can access and download the **Client ID** and **Client Secret**. These credentials also provide additional endpoint URLs for **API interactions.**

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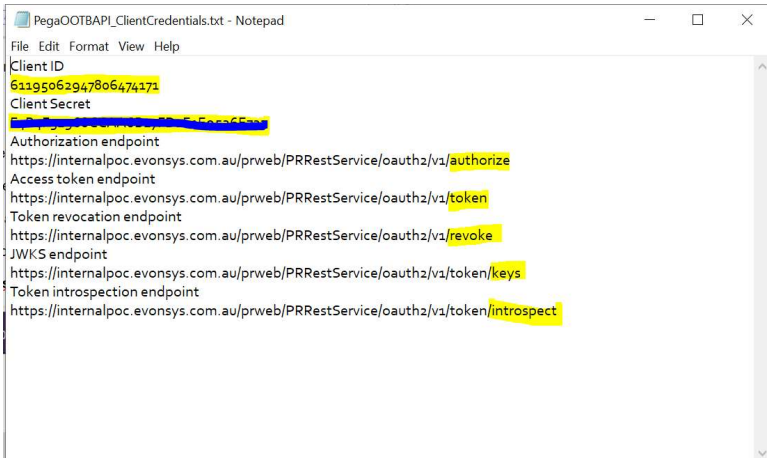

Supported Grant types: To configure your application for authentication, select **Client Credentials** as the grant type. This allows your application to obtain access tokens from the authorization service.

With these credentials, you can securely access **protected resources** in the external application for a defined period.

To exchange user credentials for an access token, select **Password Credentials** as the grant type during configuration.

Use this grant type when your application has a **trusted relationship** with the API provider or if the API provider **does not support other authorization grants.**

Test the API Before Implementation

If you want to preview how the API functions before creating a REST API, launch Pega API from the developer portal.

Before testing the API in **Swagger**, you must first **authenticate** using the required credentials.

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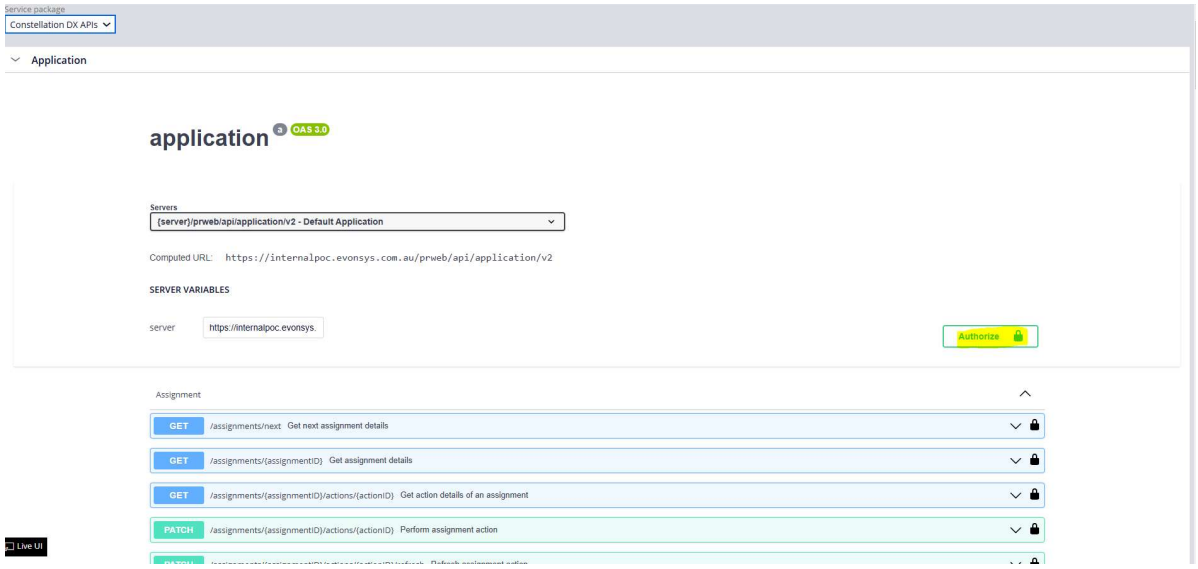

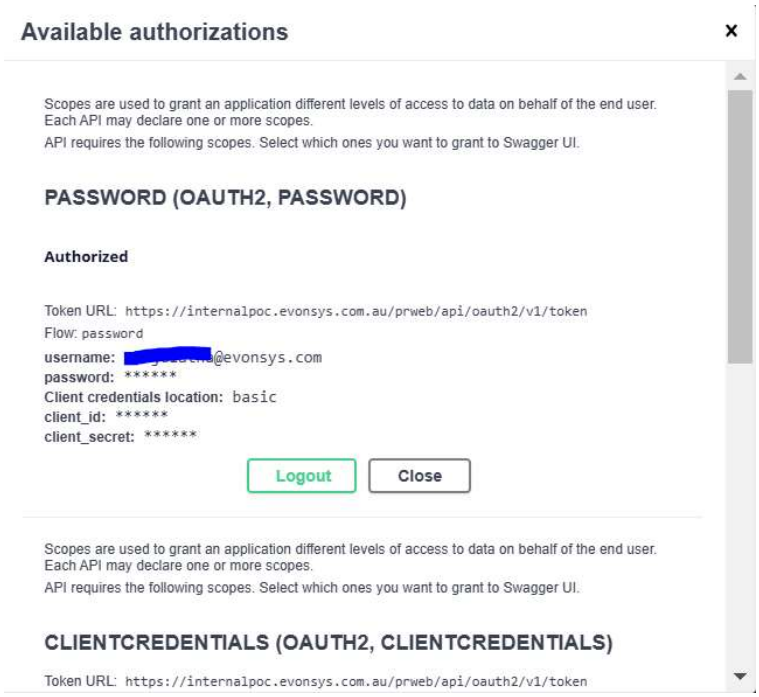

To create a case, select the **/cases** category in the API.

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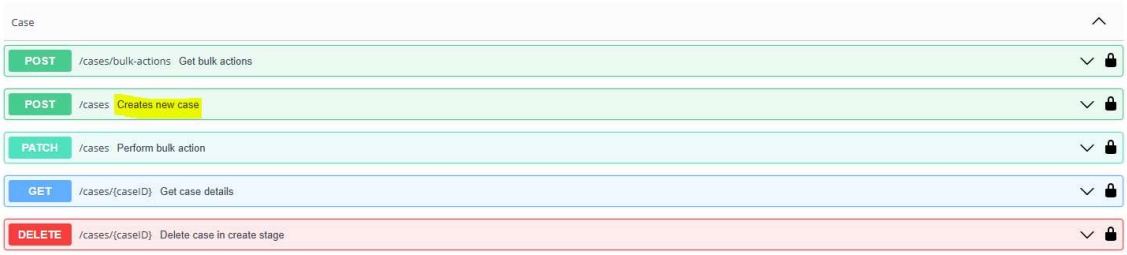


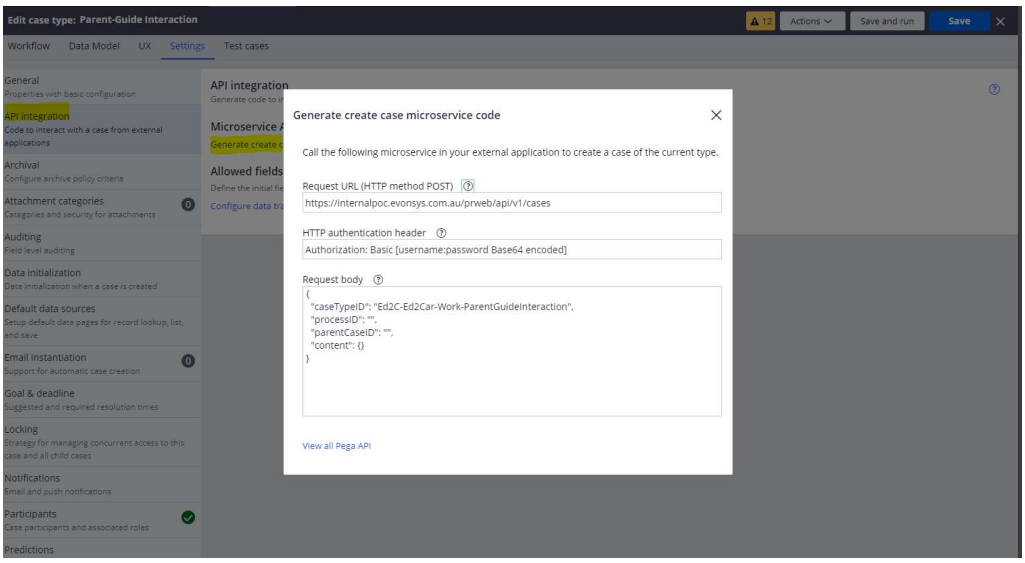
You can find the API URL in two locations:

1. From the service package
2. From Service Rest

To create a case, we need to use the following URL with POST method

https://internalpoc.evonsys.com.au/prweb/api/application/v2/cases
https://internalpoc.evonsys.com.au/prweb/api/v1/cases

In newer versions of **Pega (Constellation),** the **request payload** is generated directly from the **case type** itself.



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Basic request payload

```
{
 "caseTypeID": "<casetype calss>",
 "processID": "",
 "parentCaseID": "",
 "content": {}
}
```

To assign a value to a **property, specify** it in the **content type**. If you need to add values to a **Page, Page List, or Page Group property**, define them under **Page Instructions**. Similarly, if you want to attach a file, include it under **Attachments**.

```
{
 "caseTypeID": "LoanApplication",
 "content": {
  "CustomerName": "John Doe",
  "LoanAmount": 5000,
  "Priority": "High"
 },
```

To assign values to page property, the following are the instructions

```
 "pageInstructions": [
  {
   "target": ".AccountDetails",
   "data": {
    "ID": "12345",
    "StartDate": "2024-11-01"
   }
```

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To assign values to page property, the following are the instructions

```
{
"instruction": "ADD",
"target":"pyWorkParty",
"groupIndex" : "Customer",
"content":{
"pyFirstName":"Manju",
"pyLastName":"latha",
"pyEmail1":"manjulatha@gmail.com"
   }
 ],
```

To add some attachments to case, following are the instructions

```
 "attachments": [
   {
    "fileName": "loan-agreement.pdf",
    "fileContent": "base64encodedcontent",
    "mimeType": "application/pdf"
   }
 ]
}
```

https://docs.pega.com/bundle/dx-api/page/platform/dx-api/page-instructions-for-page-lists.html

https://docs.pega.com/bundle/dx-api/page/platform/dx-api/page-instructions-embedded-pages.html

https://docs.pega.com/bundle/dx-api/page/platform/dx-api/page-instructions-page-groups-2.html

To include these instructions in case creation, update the AllowedStartingFields data transform. This data transform must belong to the class where you want to create the case.

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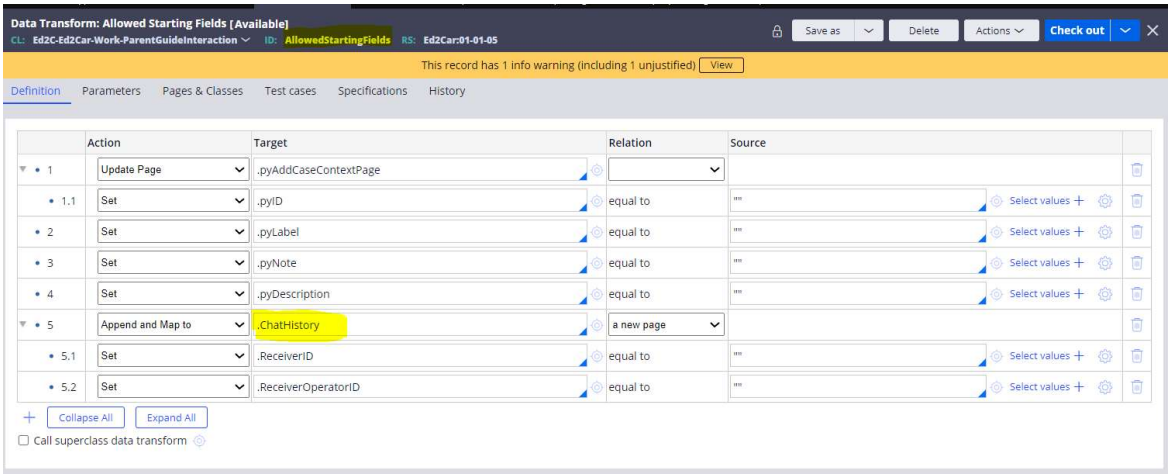

Sample Json:


```
{
 "caseTypeID": "Ed2C-Ed2Car-Work-ParentGuideInteraction",
 "processID": "",
 "parentCaseID": "",
 "content": {
            "pyLabel": "API Testing",
            "pyNote": "Create Case"
 },
 "pageInstructions": [
  {
   "instruction": "APPEND",
   "target": "ChatHistory",
   "content": {
    "ReceiverID": "Chocolate",
    "ReceiverOperatorID": "10"
   }
  }
 ]
}
```


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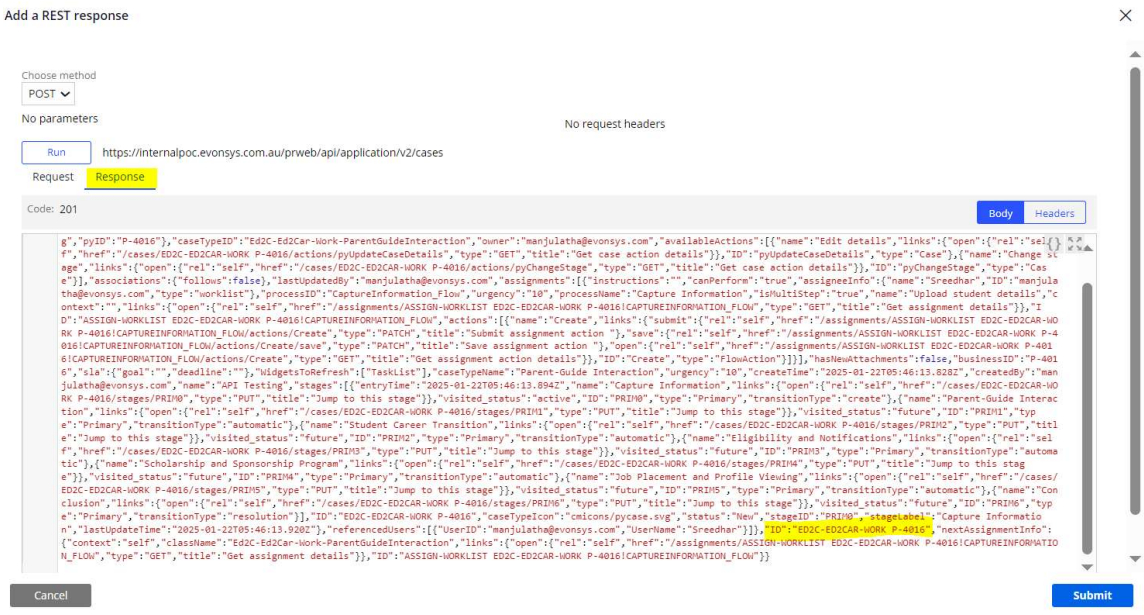

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Update Cases

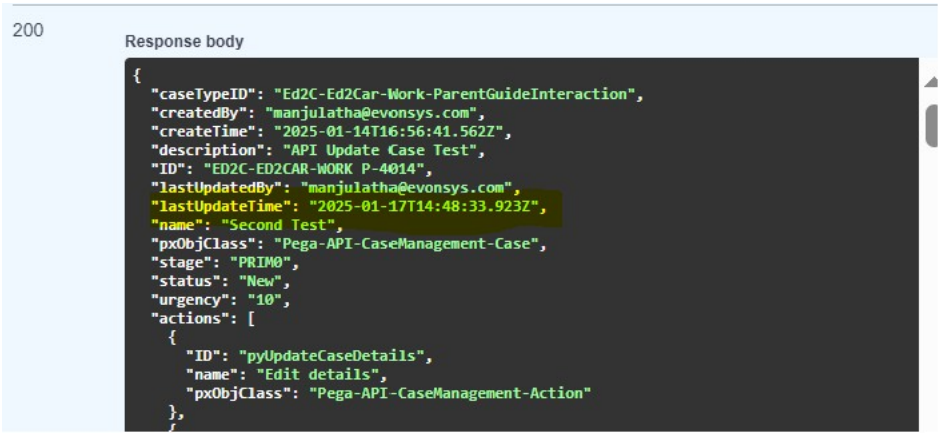
To update a case using DX API, you first need to retrieve the last case update timestamp. This requires calling a separate API to fetch the latest updated date and time:

https://internalpoc.evonsys.com.au/prweb/api/application/v2/cases/{caseID} or

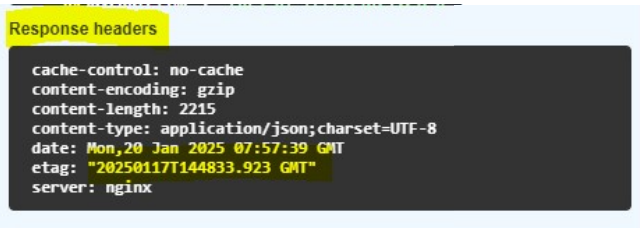
https://internalpoc.evonsys.com.au/prweb/api/v1/cases/{id}

For this API request, you must provide the pzInsKey of the case as a parameter.)

This is a **GET method API** that retrieves all case details. From the response body, the **LastUpdateTime** field contains the **last updated date** and **time** of the case.



The Response Header also includes the case's last update date and time, stored in the etag field.



If we are going to use the data from Response body property, we need to format it correctly **(2025-01-17T14:48:33.923Z to 20250117T144833.923 GMT)**

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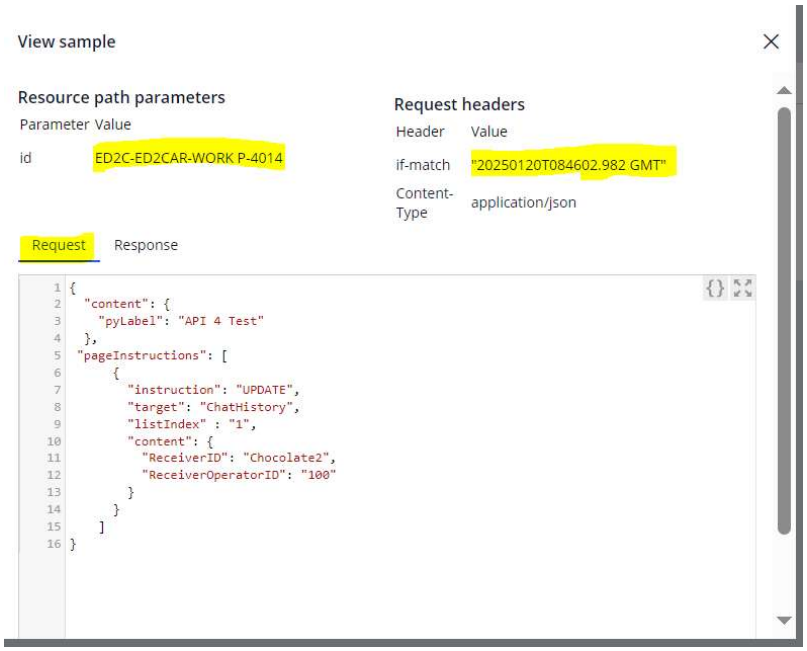
Now to update a case

URL: https://internalpoc.evonsys.com.au/prweb/application/v2/cases/{id}
Method: PUT



Here is the sample payload:

```
{
 "content": {
   "pyLabel": "API Case Update Test"
 },
"pageInstructions": [
    {
      "instruction": "UPDATE",
      "target": "ChatHistory",
      "listIndex" : "1",
      "content": {
        "ReceiverID": "Chocolate2",
        "ReceiverOperatorID": "100"
      }
    }
  ]
}
```

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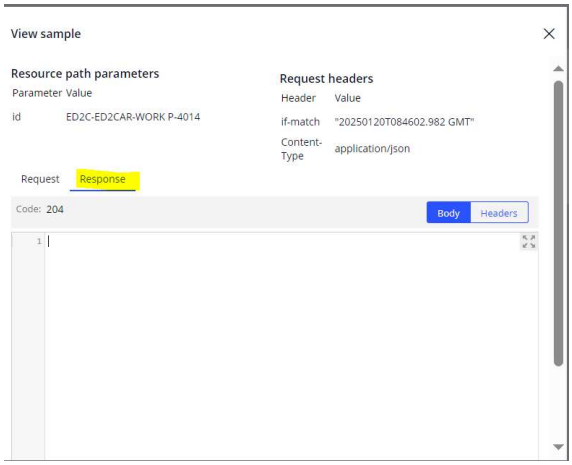
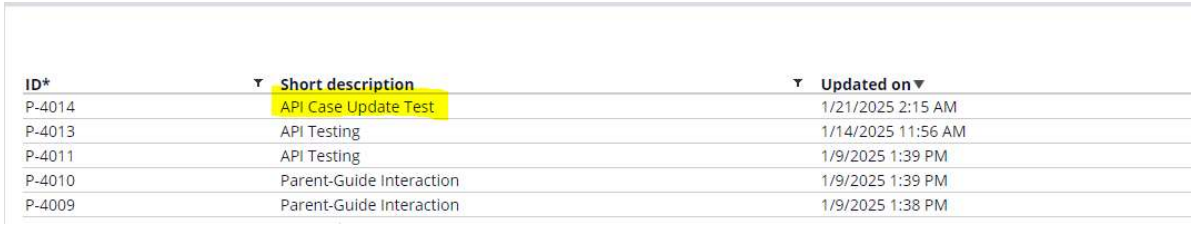


We won't get any response for this if it is a successful API hit. Here response code is 204, hence it is a successful hit



ID*	Short description	Updated on
P-4014	API Case Update Test	1/21/2025 2:15 AM
P-4013	API Testing	1/14/2025 11:56 AM
P-4011	API Testing	1/9/2025 1:39 PM
P-4010	Parent-Guide Interaction	1/9/2025 1:39 PM
P-4009	Parent-Guide Interaction	1/9/2025 1:38 PM

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