

Use Case on GenAI Connect Implementation

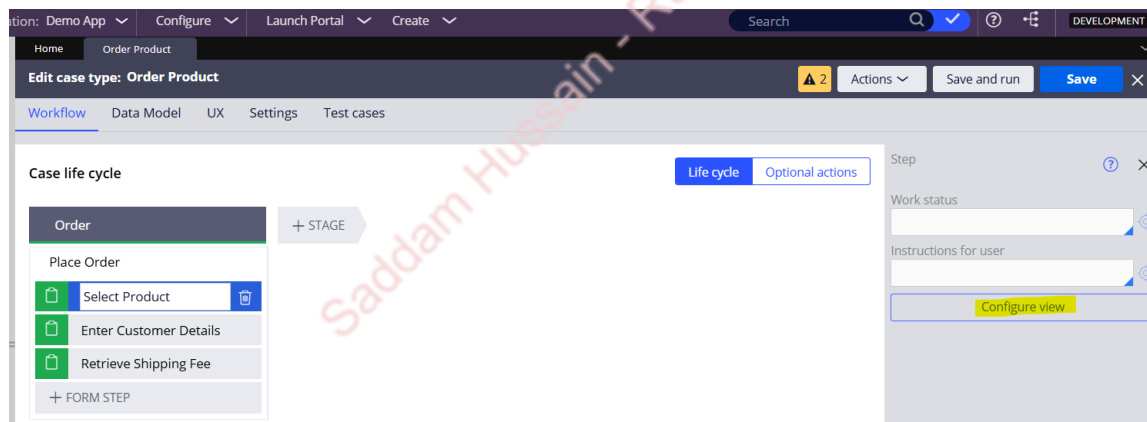
Use Case Requirement:

When user provides a prompt input in UI, Pega GenAI will process the input and generates the Response and display on the same screen

Use Case Implementation Steps:

1. Create two Text Properties: UserInput and GenAIResponse.
2. Create a Case Type and configuring the above properties in a View.
3. Create and Configure Field Value rule.
4. Create and Configure GenAI Connect Rule.
5. Configure Form refresh settings in Flow Action.

Create a Case Type and configuring the created properties in a View



ation: Demo App ▾ Configure ▾ Launch Portal ▾ Create ▾ Search 🔍

Home Order Product

Display Conditions Pre/Post Processing

Preview as
Constellation ▾

UserInput

GenAIResponse

Cancel

Submit

Edit View: Create ⓘ

Template
Default form
Edit

Layout
1 column ▾

Instructions
Case step instructions ▾

Fields

UserInput	Text (single line)	⚙️	🗑️
GenAIResponse	Text (paragraph)	⚙️	🗑️

+ Add

> Advanced

Click on settings of GenAIResponse field and select Text Area in Display as dropdown.

Home Order Product

Display Conditions Pre/Post Processing

Preview as
Constellation ▾

UserInput

GenAIResponse

Cancel

Submit

Configure field: GenAIResponse ⓘ
Text (paragraph)

Display as
Text area ▾

Field label
Custom ▾

Custom field label *
GenAIResponse

Edit mode
Read-only ▾

Conditions

Visibility
Always ▾

Advanced

Test ID

Cancel Save

Create and Configure Field Value rule

ation: Demo App | Configure | Launch Portal | Create | Search | DEVELOPMENT

Home | Order Product | New | GenAI Connect | pzGetSampleRe... | pyGenerativeA... | New

Create Field Value | Cancel | Create and open

Field Value Record Configuration

Label *
GetUserPrompt
A short description or title for this record

Identifier
GetUserPrompt | Edit

Field Name
pyGenerativeAIPrompt

[View additional configuration options](#)

Context

☒ Demo App
☐ Constellation UI
☐ Pega Platform

Apply to *
RSOrg-DemoApp-Work-OrderProduct | [View all](#)

Add to ruleset *
DemoApp | 01-01-01

In field name, Specify the pyGenerativeAIPrompt.

ation: Demo App | Configure | Launch Portal | Create | Search | DEVELOPMENT

Home | Order Product | New | GenAI Connect | pzGetSampleRe... | pyGenerativeA... | pyGenerativeA... | UserInput

Edit Field Value: GetUserPrompt [Available]
CL: RSOrg-DemoApp-Work-OrderProduct | ID: pyGenerativeAIPrompt • GetUserPrompt | RS: DemoApp:01-01-01 | Delete | Actions | Save | X

[Localized label](#) | Specifications | History

Translate from
GetUserPrompt

To
{.UserInput}

Extra whitespaces will be collapsed to single space by browser

Field Value Parameters

Parameter	Default
No items	

In To field, Enter {.UserInput}

Create and Configure GenAI Connect Rule

The screenshot shows the 'Create GenAI Connect' configuration window in DEV STUDIO. The left sidebar contains a navigation menu with categories like 'Records', 'Case types', 'Data types', 'App', 'Records', and 'Favorites'. The 'Records' category is expanded, showing 'GenAI Connect' as the selected option. The main panel is titled 'Create GenAI Connect' and contains the following sections:

- GenAI Connect Record Configuration:** Includes a 'Label' field with the value 'TestGenAI' and an 'Identifier' field with the value 'TestGenAI'.
- Context:** Includes a 'Demo App' radio button, a 'Constellation UI' radio button, and a 'Pega Platform' radio button. It also has an 'Apply to' dropdown set to 'RSOrg-DemoApp-Work-OrderProduct', an 'Add to ruleset' dropdown set to 'DemoApp', and a date dropdown set to '01-01-01'.
- Current work item:** Includes an 'Associated workitem' dropdown set to 'Select...'.

The screenshot shows the 'Edit GenAI Connect: TestGenAI' configuration window in DEV STUDIO. The top bar includes tabs for 'Home', 'Service Package', 'UserInput', 'GenAIResponse', 'GenAI Connect', 'TestGenAI', and 'pyGenerativeA...'. The main panel is titled 'Edit GenAI Connect: TestGenAI [Available]' and contains the following sections:

- Request:** Includes a 'Customize system prompt' checkbox, a 'System prompt' field with the value 'pzDefaultSystemPrompt', and a 'User prompt' field with the value 'GetUserPrompt'.
- Response:** Includes an 'Expected Response Mode' section with radio buttons for 'Structured - Single', 'Structured - List', and 'Unstructured' (selected). It also has a 'To property' field with the value '.GenAIResponse'.

Request:

In User prompt field, Select the above created Field Value rule.

Response:

Select **Unstructured** Mode and Specify a property to hold the generated response.

Configure the Form refresh settings in Flow Action

Application: Demo App | Configure | Launch Portal | Create | Search | DEVELOPMENT

Home | Order Product | TestGenAI | GenAI Connect | pyGenerativeA... | CreateForm_De... | Create | New

Edit Flow Action: Create [Available]
CL: RSOrg-DemoApp-Work-OrderProduct | ID: Create | RS: DemoApp:01-01-01 | Delete | Actions | Save

Layout | Validation | Action | Help setup | Security | HTML | Pages & Classes | Specifications | History

Section configuration

Page context
Use current page context

Applies to
RSOrg-DemoApp-Work-OrderProduct

Section
Create | Edit parameters

View configuration

View
Create

Form refresh settings

When property changes
.Userinput

then run data transform
GenerateAIResponse

+ Add condition

Create a Data Transform and pass GenAI Connect rule name as parameter to an OOTB Activity **pxConnectToGenerativeAI**.

Application: Demo App | Configure | Launch Portal | Create | pxConnectToGenerativeA | DEVELOPMENT

Home | Order Product | TestGenAI | GenAI Connect | pyGenerativeA... | CreateForm_De... | Create | GenerateAIRes... | pxConnectToGe...

Edit Data Transform: GenerateAIResponse [Available]
CL: RSOrg-DemoApp-Work-OrderProduct | ID: GenerateAIResponse | RS: DemoApp:01-01-01 | Delete | Actions | Save

This record has 1 info warning (including 1 unjustified) | Review/Edit

Definition | Parameters | Pages & Classes | Test cases | Specifications | History

	Action	Target	Relation	Source
1	Set	Param.RuleName	equal to	TTestGenAI
2	Set	Param.Result	equal to	@pxExecuteAnActivity(Primary,"pxCo

+ Collapse All | Expand All

☒ Call superclass data transform

Application: Demo App | Configure | Launch Portal | Create | pxConnectToGenerativeA | DEVELOPMENT

Home | Order Product | TestGenAI | GenAI Connect | pyGenerativeA... | CreateForm_De... | Create | GenerateAIRes... | pxConnectToGe...

Edit Data Transform: GenerateAIResponse [Available]
CL: RSOrg-DemoApp-Work-OrderProduct | ID: GenerateAIResponse | RS: DemoApp:01-01-01 | Delete | Actions | Save

Definition | Parameters | Pages & Classes | Test cases | Specifications | History

Expression builder

1 pxExecuteAnActivity(Primary,"pxConnectToGenerativeAI")

Unit Testing of Use Case:

Application: Demo App | Configure | Launch Portal | Create | pxConnectToGenerativeA | DEVELOPMENT

Home | Order Product | TestGenAI | GenAI Connect | pyGenerativeA... | CreateForm_De... | Create | GenerateAIRes... | pxConnectToGe... | O-2005

Create Order Product (O-2005)

Select Product

UserInput

What is Gen AI in Pega

GenAIResponse

Gen AI in Pega refers to the integration of generative artificial intelligence technologies within the Pega platform to enhance business processes, automate decision-making, and improve customer interactions. It leverages AI capabilities to generate insights, automate tasks, and provide personalized experiences, ultimately driving efficiency and innovation in enterprise applications.

Cancel | Fill form with AI | Next

-----Thank You-----

Saddam Hussain - RulesStack Pvt Ltd