

# Constellation

The why, what and how  
Jeroen Geerdink, Marco Duizer











And you?



**Marco Duizer**  
**Mr. Modular**  
**Reuse**

**Jeroen Geerdink**  
**& Architect,**  
**Father and 18+**  
**years Pega**

Which of these represents Constellation the best?\*

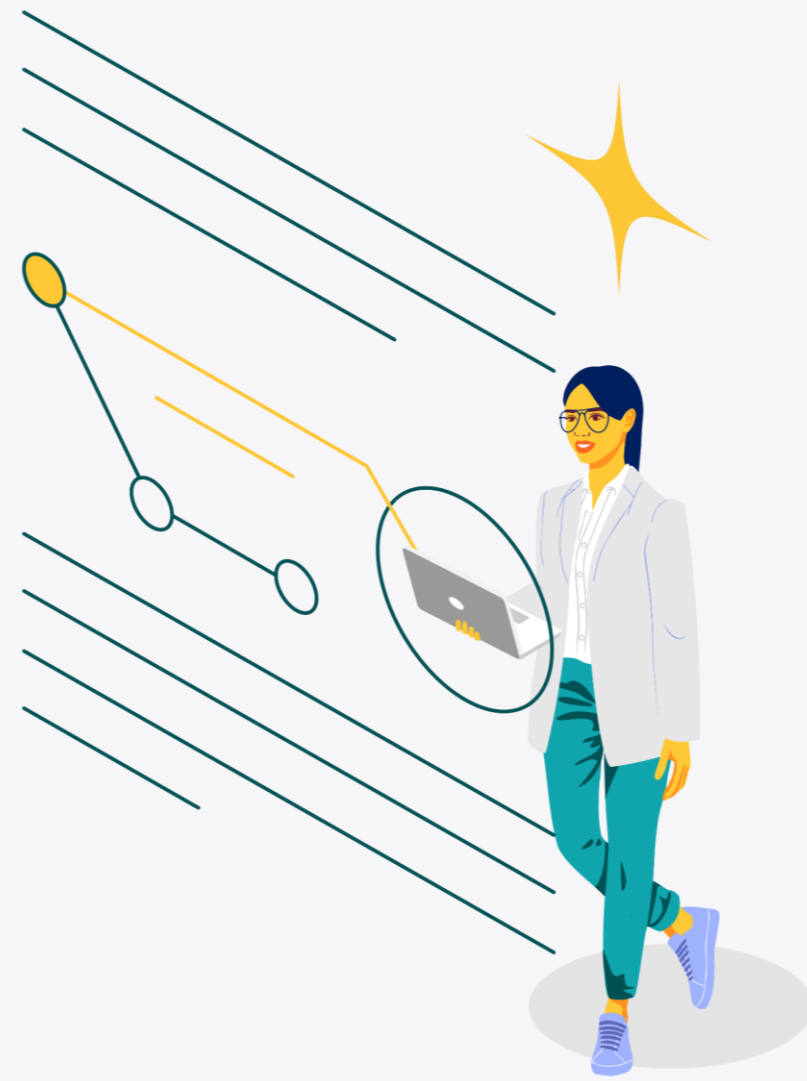


Slido





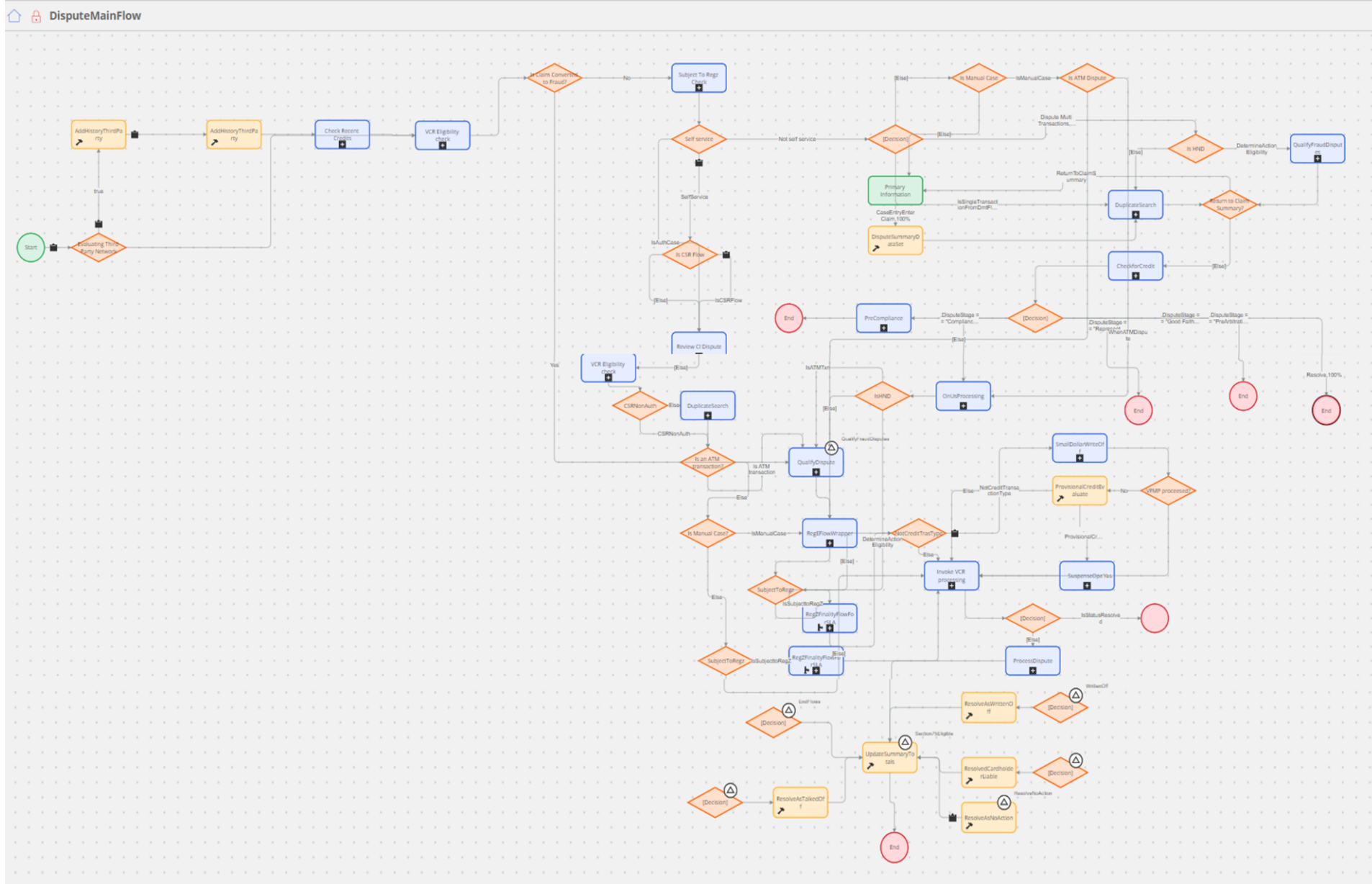
# Why?



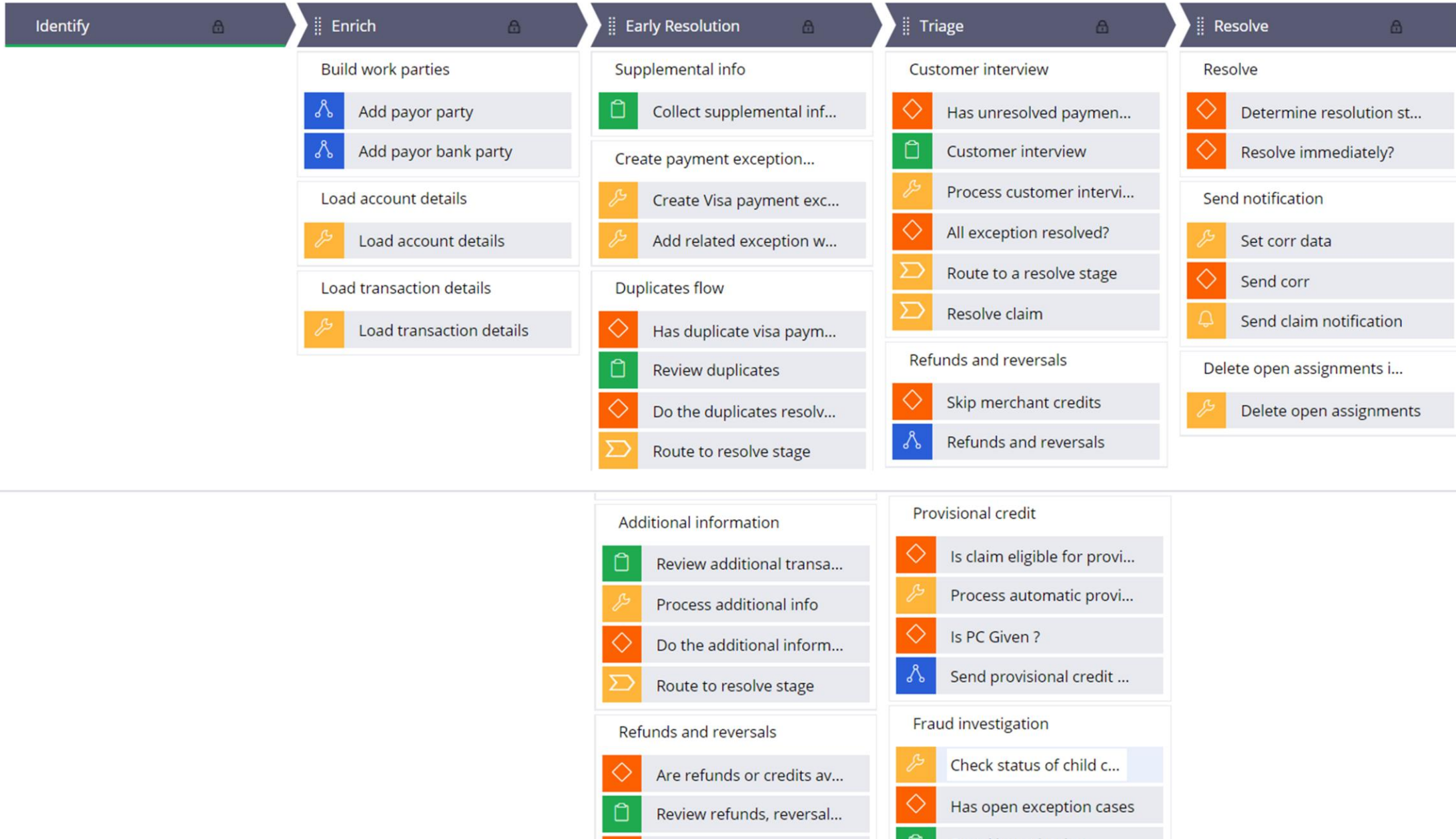


**Outcomes; fast and easy**

# Complex Nested Flows



# Case Designer



# Complex Nested Sections

The screenshot displays the Pega Dev Studio interface for a web application. The left sidebar shows the navigation tree with 'Section' selected under 'User Interface'. The main workspace is filled with several overlapping section editors, each showing a different part of the application's layout. The sections are:

- Section: pyPortalNav [ Available ]**: Shows a navigation menu with a 'Menu' button and a 'Recent' section.
- Section: Case Content [ Available, Extension ]**: Shows a 'Case Contents' section with a warning: 'This record has 1 info warning'.
- Section: Grid No Results Message [ Available ]**: Shows a message for 'pyGridNoResultsForGenAICoachIntents'.
- Section: pyMyCasesContainer [ Available, Extension ]**: Shows a 'Case Contents' section with a warning: 'This record has 1 severe or moderate warning and 1 info warning'.
- Section: Feed [ Available ]**: Shows a 'Recent' section with a warning: 'This section has some inline styles added to layouts or cells'.
- Section: Portal Navigation [ Final ]**: Shows a 'Portal Navigation' section with a 'Menu' button and a 'Recent' section.

The interface includes a top navigation bar with 'DEV STUDIO', 'Application: Shaun App', and various toolbars. The bottom status bar shows 'Agile Workbench', 'Current work', and 'Scenario testing'. The Pega logo is visible in the bottom left corner.

# Constellation Structure

**APP STUDIO** Application: U+ Bank Preview DEVELOPMENT

← Case Type: Car Actions Save and run Save

Workflow Data model **UX** Settings

Preview as Constellation desktop

**Peggy Rogers**  
C-2593

Priority 10 Urgency 30  
Status IN PROGRESS  
Account 1AS-D109304  
Account type Gold

**Details**

Pulse

History

✓ Create Doing To do

> Assignments 1

**Details**

**Personal details**

First name	Peggy	Name	U+ Loans
Last name	Rogers	Phone number	(555) 262-3444
Phone number	(555) 276-1909		

**Organization**

**Account details**

Married	Yes
Children	2

**Full Page View** Other Views

Heading \*  
Name

Subheading  
Case ID

**Highlighted fields**

- Priority Integer
- Urgency Integer

+ Add

**Summary**

- Status Text
- Account Text
- Account type Text

+ Add

**Tabs**

- Details Tab
- Pulse Tab
- History Tab

+ Add

**Utilities**

- Attachments Widget
- Followers Widget

# Paradigm shift to development



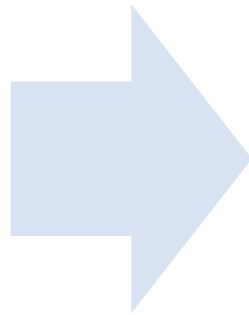
*I can design and build any UI I want  
with sections and harnesses.*

# Paradigm shift to development

SECTION/HARNESS RULE MENTALITY:



*I can design and build any UI I want with sections and harnesses.*



CONSTELLATION MENTALITY:



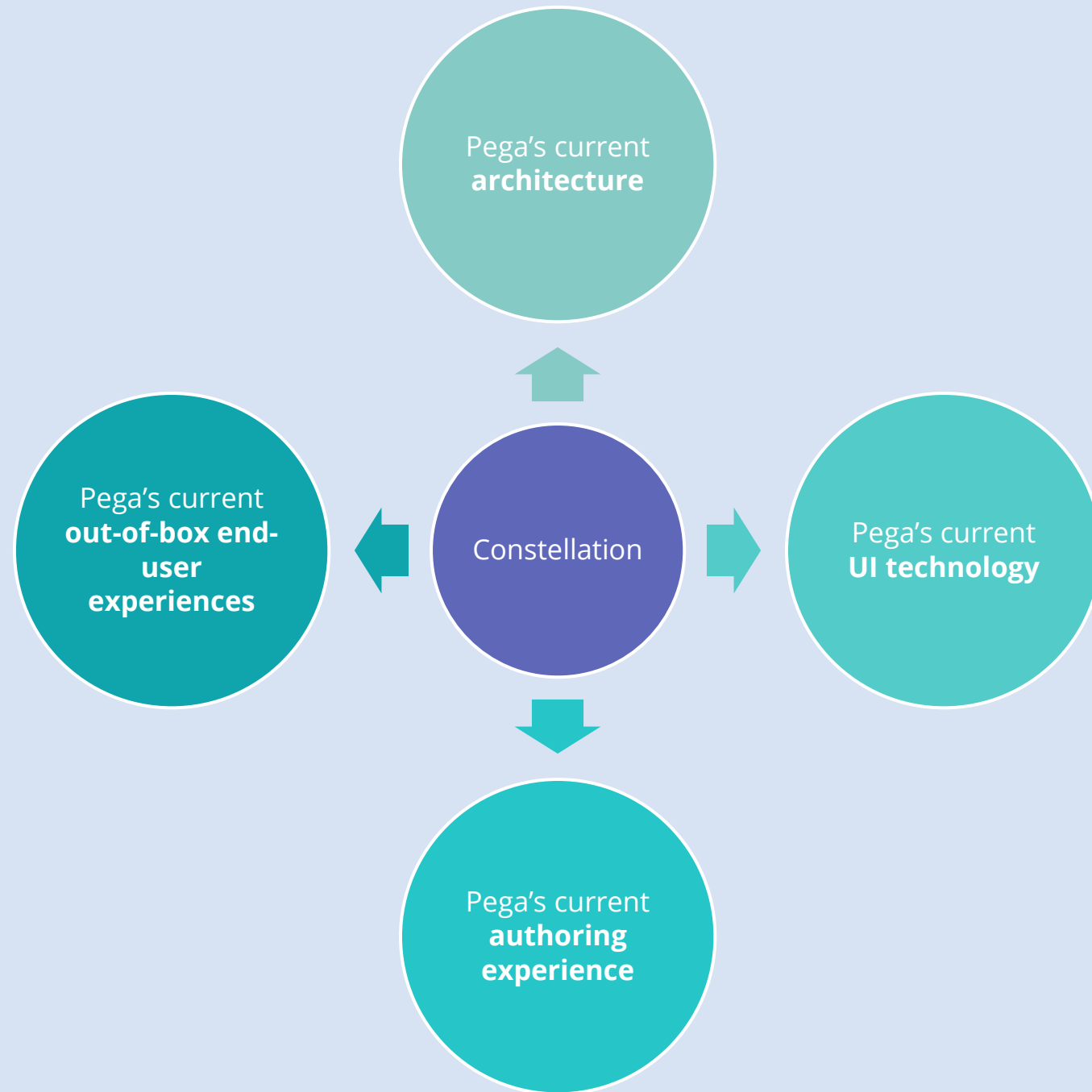
*I can swiftly build for ANY business outcomes desired, and let Constellation create the UX.*



What?



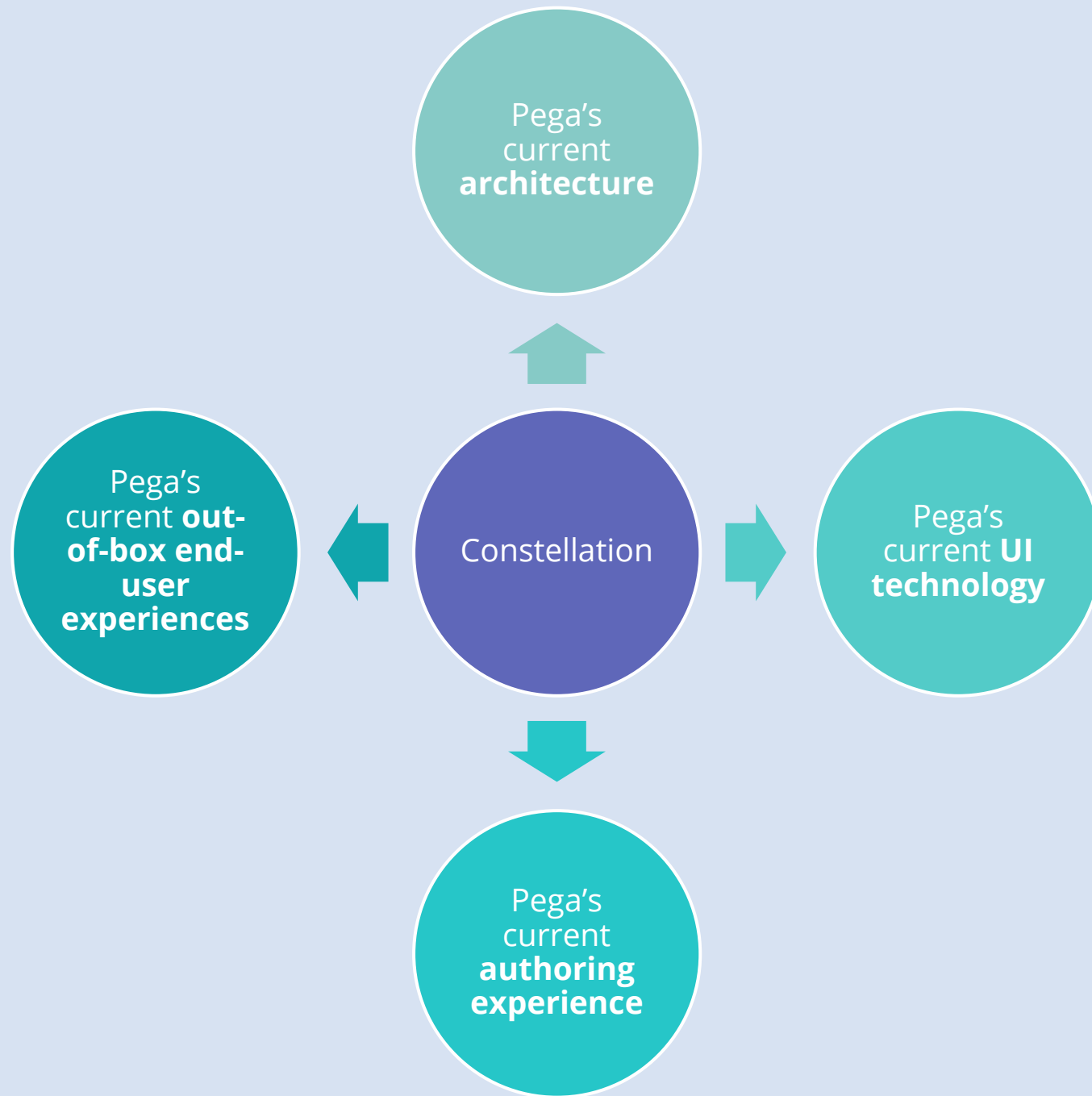




# “Constellation 8”

1. Productivity
2. Developer experience/best practices
3. Performance
4. Extensibility
5. Maintainability
6. Accessibility
7. Security
8. Localization





Pega's current **out-of-box end-user experiences**



**Peggy Rogers**  
C-2593

Reopen

Priority **10**      Urgency **30**

Phone number **+1 (888) 734-2669**

Email **work@pega.com**

Address **1 Rogers St. Cambridge, MA**

Account **1AS-D109304**

Account type **Gold**

Updated **Peggy Rogers 2d ago**

Created **Bill Blass 1y ago**

Details

Pulse

Case Details **6**

Customers **2**

✓ Create      Traige      Completed

Assignments **3**

- Send references**  
Assigned: **Bill Smith** • Due: 2 days Go
- Prepare statement**  
Assigned: **Bill Smith** • Due: 2 days Go
- Review submissions**  
Assigned: **Reggie Kindro** • Due: 4 days

Pulse

Start a conversation

**Work Area**

**John Brown**  
2 minutes ago  
Hey team!  
Could you all please take the time to fill out the survey?  
2   3

**Bartoz Jenson**  
This is great stuff! Thanks for taking the time to collect this.  
Moments ago

**Sue Smith**  
I agree, this is really detailed.  
Moments ago

**John Brown**  
4 hours ago  
Kudos to the whole group!  
8

Utilities

Attachments **4**

- Summary of work  
Contract • Kiley Gneiss
- Work plan  
Reference • Evey Prosser
- FAQ  
Link • Jobie Hennessy

Followers **99+**

- Nathan Swanson**  
Manager
- Glenna Simpson**  
Engineer
- Ralph Green**  
HR Director

**Utilities**

SMS

(555) 317-2062      Context

Hi, how may we help today?  
12:37 PM

I was wondering what the status of my work was?  
12:37 PM

Sure. Let me get you an agent.  
12:37 PM

12:41 PM: Chat routed to live agent

12:41 PM: You joined the conversation

Hi, I see you'd like to know more about you item's status?  
12:37 PM      Delivered

Phrases      Submit



**Peggy Rogers**  
C-2593

Reopen

Priority	10	Urgency	30
Phone number	+1 (888) 734-2669		
Email	work@pega.com		
Address	1 Rogers St. Cambridge, MA		
Account	1AS-D109304		
Account type	Gold		
Updated	Peggy Rogers 2d ago		
Created	Bill Blass 1y ago		

Details

Pulse

Work items 6

Customers 2



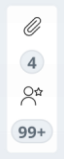
Create Traige Completed

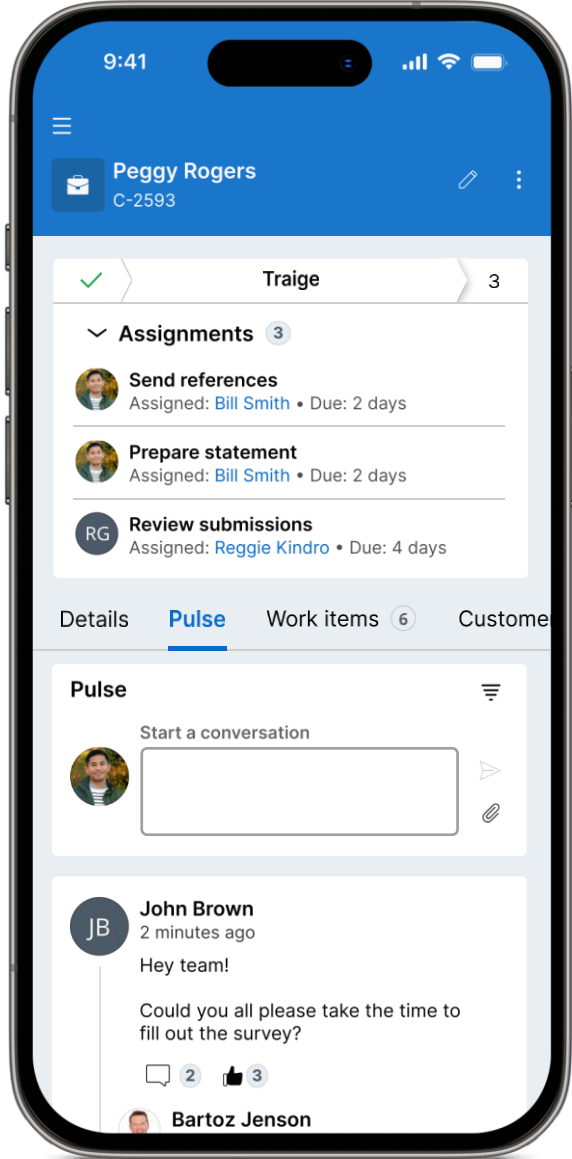
- Assignments** 3
- Send references**  
Assigned: Bill Smith • Due: 2 days Go
  - Prepare statement**  
Assigned: Bill Smith • Due: 2 days Go
  - Review submissions**  
Assigned: Reggie Kindro • Due: 4 days

**Pulse**

Start a conversation

- John Brown**  
2 minutes ago  
Hey team!  
Could you all please take the time to fill out the survey?  
2 3
- Bartoz Jenson**  
This is great stuff! Thanks for taking the time to collect this.  
Moments ago
- Sue Smith**  
I agree, this is really detailed.  
Moments ago





9:41



 **Peggy Rogers**  
C-2593



 **Traige** 3

 **Assignments** 3



 **Send references**  
Assigned: [Bill Smith](#) • Due: 2 days


 **Prepare statement**  
Assigned: [Bill Smith](#) • Due: 2 days

 **Review submissions**  
Assigned: [Reggie Kindro](#) • Due: 4 days

Details **Pulse** Work items 6 Custom

**Pulse** 

Start a conversation  
  
 

 **John Brown**  
2 minutes ago  
Hey team!  
  
Could you all please take the time to fill out the survey?

 2  3

 **Bartoz Jenson**

**John Brown**  
Customer

Lifetime value: **Silver**  
Payment status: **8 days past due**

Customer status: Verified  
Customer tenure: 2 years 3 months  
Active accounts: 2  
Account: Ultimate triple play - 0010  
Account type: Consumer  
Account status: Active  
Call back: +1 541 754 3011  
Last interaction: Inbound Call - Jun 05, 2023

**Accounts**

Recent activity

Okay, John. Please let me know how you want your billing statements delivered and we will ensure to use your chosen delivery method going forward.

**Tasks** Wrap up + Add task

Make payment Go paperless

Capture bill delivery preferences S-7019 PENDING-INTAKE Actions

Account: Ultimate triple play - 0010

Select delivery preferences

Preference	Type	Send to
<input type="checkbox"/>	Email	johnbrown65@gmail.com
<input type="checkbox"/>	Mail	9526 Manchester Rd, St. Louis, MO, 63119, USA

Note: You will receive the billing statement based on your communication preference. You can choose email or mail or both.

Cancel Save for later Submit

**Accounts**

Service account: Ultimate triple play - 0010

Current bill amount due	Past due amount	Payment status
<b>\$320.00</b>	<b>\$160.00</b>	<b>8 days past due</b>

Bill due date May 28, 2023	Days left in billing cycle 14	Auto payment Yes
Last payment amount \$160.00	Last payment date May 2, 2023	Mode of bill Mail
Billing address 9526 Manchester Rd, St. Louis, MO, 63119, USA	Email johnbrown65@gmail.com	Account type Consumer

Billing

Knowledge articles

Enter a search

Category: Filter by category Sort by: Most relevant

[How do I reach out to U+Comm on Facebook Messenger?](#)  
You can now use Facebook Messenger to contact U+Comm customer support and quickly get assistance. There are several ways you can get in touch with U+...  
June 3, 2023

[Cable issue - Can only get channel 3: everything else is black](#)  
Can Only Get Channel 3: Everything Else Is Snow or Black Screen  
June 3, 2023

[Understanding cellular signal strength](#)  
Understanding cellular signal strength  
June 3, 2023

**Customer inquiry 2**

Current bill amount due (Ultimate triple play - 0010)  
\$320.00

Mode of bill (Ultimate triple play - 0010)  
Mail

**Attachments 0**

No items

**Suggested actions 2**

- Manage paperless billing  
Enroll in paperless billing
- Upgrade to 5G Device with \$0 DP, 24-month EIP





### Lamborghini Espada

C-2593



Price **\$120,232** Condition **Excellent**

Status **IN PROGRESS**

Customer **Sarah Smith**

Sale date **Jun 11, 2010**

Seller **1AS-D109304**

Updated **Peggy Rogers 2d ago**

#### Details

Pulse

Bids **23**

Directions

Start > Finalize sale > Factory order > Delivery > Finish sale

#### Tasks

**Check mechanical at arrival**  
Task in M-1233 • Due in 2d • Urgency 95

Go

**Prepare for delivery**  
Due in 2d • Urgency 45

**Finalize auction**  
Due in 1d

Show more

#### Details

Top bid	Time remaining	Mileage	Transmission
<b>\$120,000</b>	<b>3h 53min 46s</b>	<b>64,239</b>	<b>Manual</b>



#### Description

A sound and original Lamborghini Espada Series 3. The Espada is a special rare car with a total production run of only

#### Prediction

**Will meet reserve.**  
Price estimate \$120,000

#### Attachments 4

**Mechanical summary**  
Review • Kiley Gneiss

**Insurance plan**  
Reference • Evey Prosser

**FAQ**  
Link • Jobie Hennessy

View all

#### Followers 12

**Nathan Swanson**  
Manager

**Glenn Simpson**  
Engineer

**Ralph Green**  
HR Director

View all

#### Theme colors

Brand



App background



App header background



Nav background



Interactive items



Links





### Lamborghini Espada C-2593

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[Show more](#)

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#### Theme colors

- Brand
- App background
- App header background
- Nav background
- Interactive items
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Lamborghini Espada

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View all

Followers 12

**NS** **Nathan Swanson**  
Manager

**GS** **Glenn Simpson**  
Engineer

**RG** **Ralph Green**  
HR Director

View all

Theme colors

Brand



App background



App header background



Nav background



Interactive items



Links



# Accessibility first

www.pegacom/insights/resources/voluntary-product-accessi

Pega Sites

PEGA Platform Solutions Customers Learn Services & Partners Events About

DATA SHEET

## Voluntary Product Accessibility Template for Pega Customer Service '23 - Constellation UI v2.3

PDF | 13 Pages | 659 KB

[Download Now](#)

This Voluntary Product Accessibility Template, or VPAT™, report represents the Pega Customer Service '23 – Constellation UI v23.1 conformance to WCAG 2.1 AA guidelines published by the World Wide Web Consortium (W3C). This report details the criteria evaluated, the conformance level, and explanations for the rating provided.

Pega Customer Service '23-Constellation fully supports the majority of criteria and is partially conformant with a few. Partial conformance means that some functionality of the product does not meet the criterion outlined. These areas are detailed in the explanation column and are planned in our upcoming roadmap.

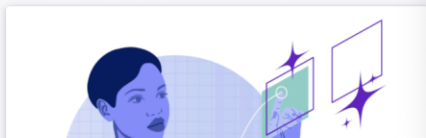
### TAGS

Product Area: [Customer Service](#) Topic: [Compliance](#) Topic: [UX and Design](#)

### Related Resources

VIDEO

[Intro to Pega Customer Service: Service, Simplified >](#)

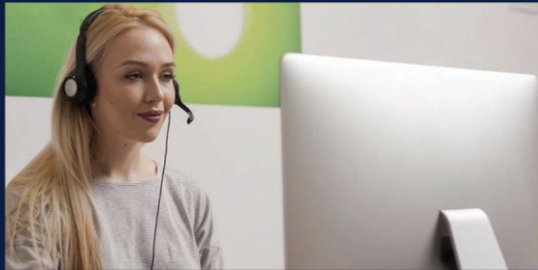


www.pegacom/insights/articles/building-accessible-applic

Pega Sites Hello Attendee

PEGA Platform Solutions Customers Learn Services & Partners Events About Try Pega

Pega Blog 1:1 Customer Engagement Proactive Customer Service Intelligent Automation Pega Culture



## Building accessible applications for the enterprise

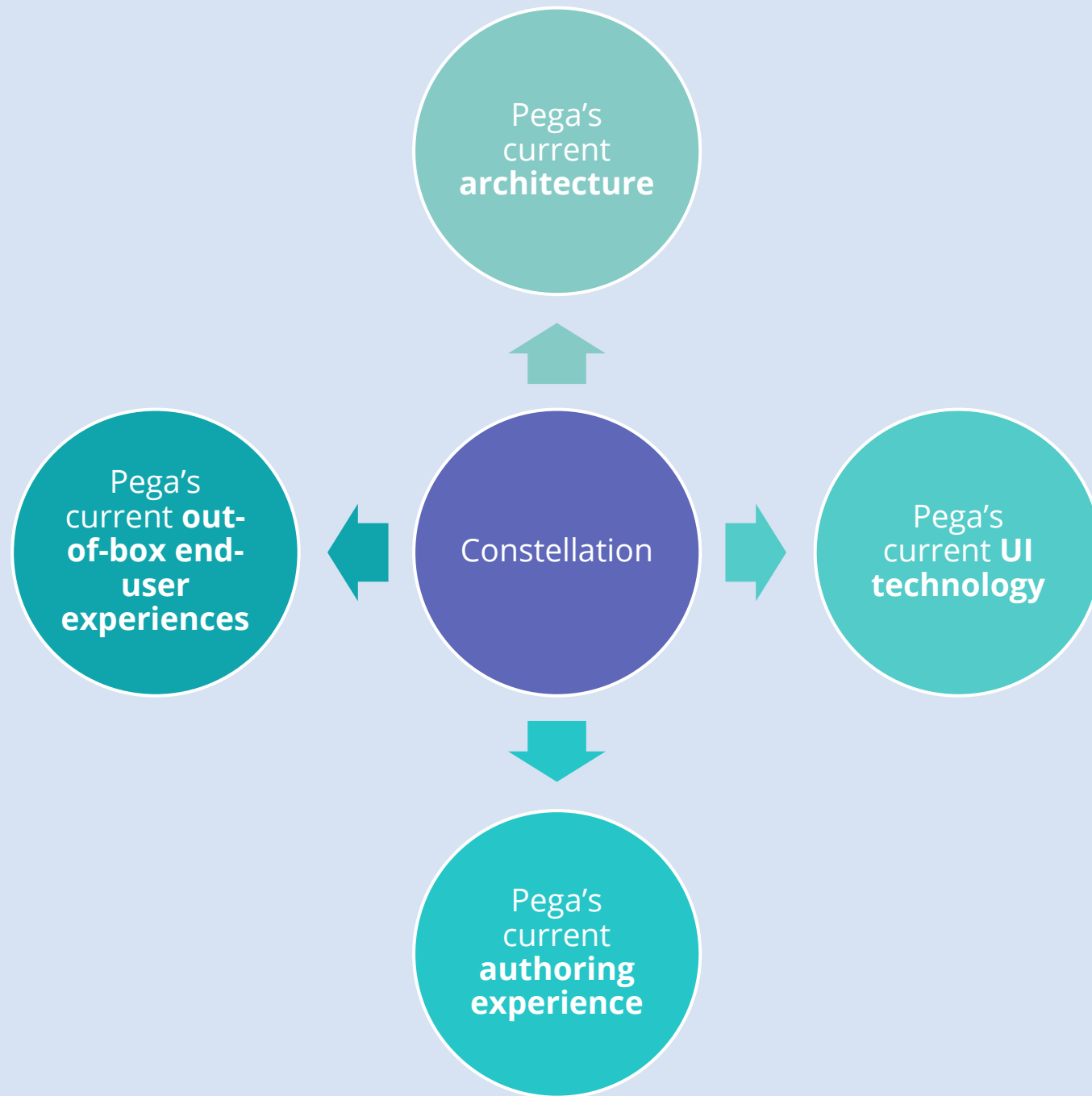
Jill Power, Sep 25, 2023 Share [f](#) [X](#) [in](#) [en](#) [Log in to subscribe to the Blog](#)

If there is one thing that organizations have learned over the last few years, it is that our workforce is resilient and adaptable. With the onset of COVID, organizations scrambled to put processes and technologies in place to support remote workers across most industries. Companies were able to move quickly to a digitally dependent operations model. However, this new digital world also exposed a gap globally, i.e., the lack of adequate access for people with disabilities. Activities that once could be managed in person were now only available online, and unfortunately many applications did not meet the needs of people with disabilities. This lack of support not only impacts an organization's customers but also their workforce. All internal processes had to be handled online due to the now remote teams. So, the question must be asked, are we creating an equitable and digitally inclusive environment for all our team members to be efficient in their job?

At [Pega](#), our product team and engineers have spent countless hours discussing and developing prototypes to address this critical question. In creating our new [Constellation Design System](#), Pega made it a goal to develop features with accessibility in mind. We wanted to ensure that any applications built on this [platform](#) could be used by everyone.

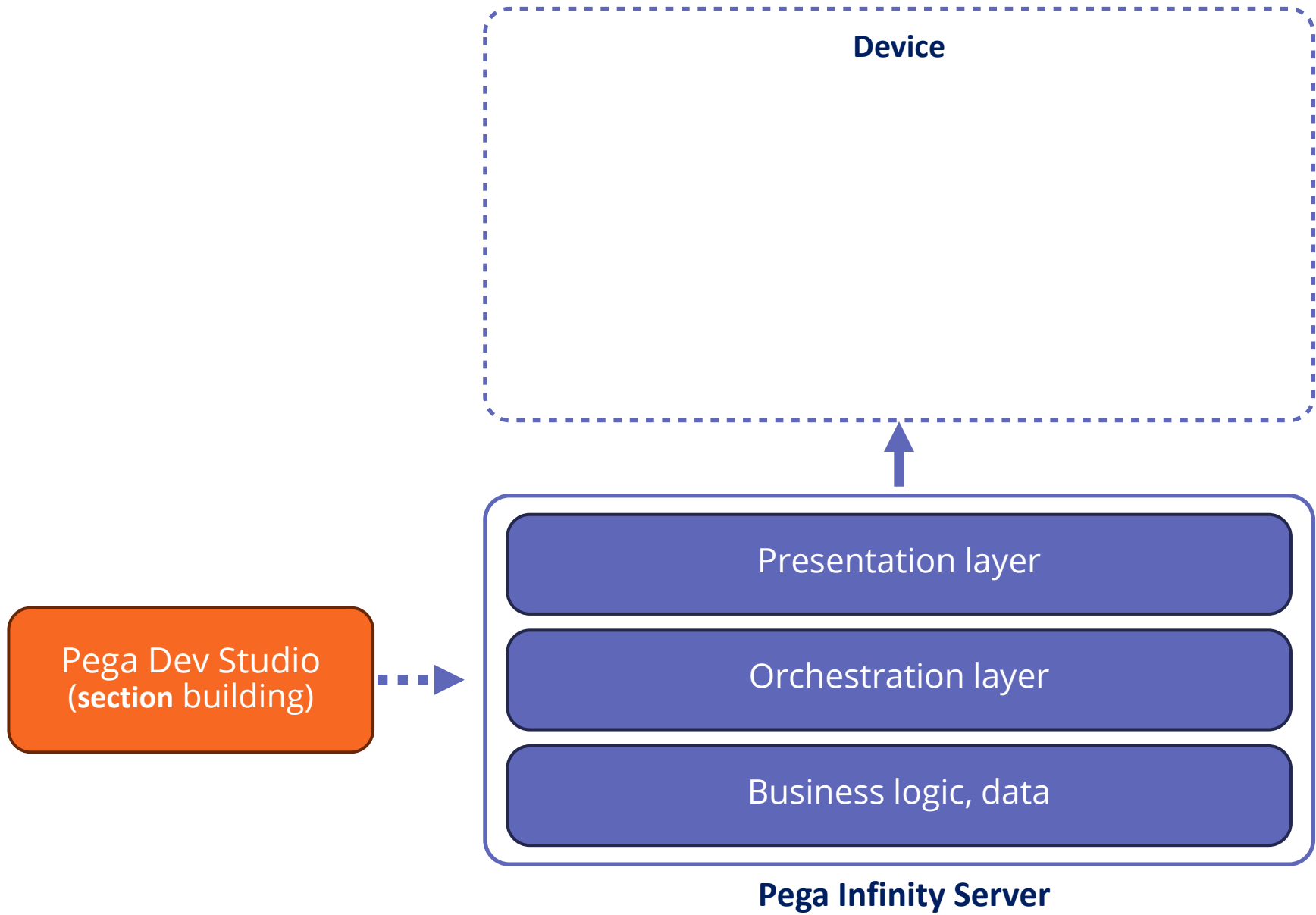
"To accomplish this, we partnered with digital accessibility solution provider, Level Access. The CEO and Founder of Level Access, Tim Springer shares, "It was clear to us from the beginning that Pega is committed to delivering exceptional experiences for all users, and ultimately to creating more equitable workplaces for people of all abilities. By embedding accessibility into its Constellation design system, Pega is ensuring that new features incorporate accessibility standards by default and is setting a consistent standard for inclusive workplace solutions."

Pega's current **out-  
of-box end-user  
experiences**

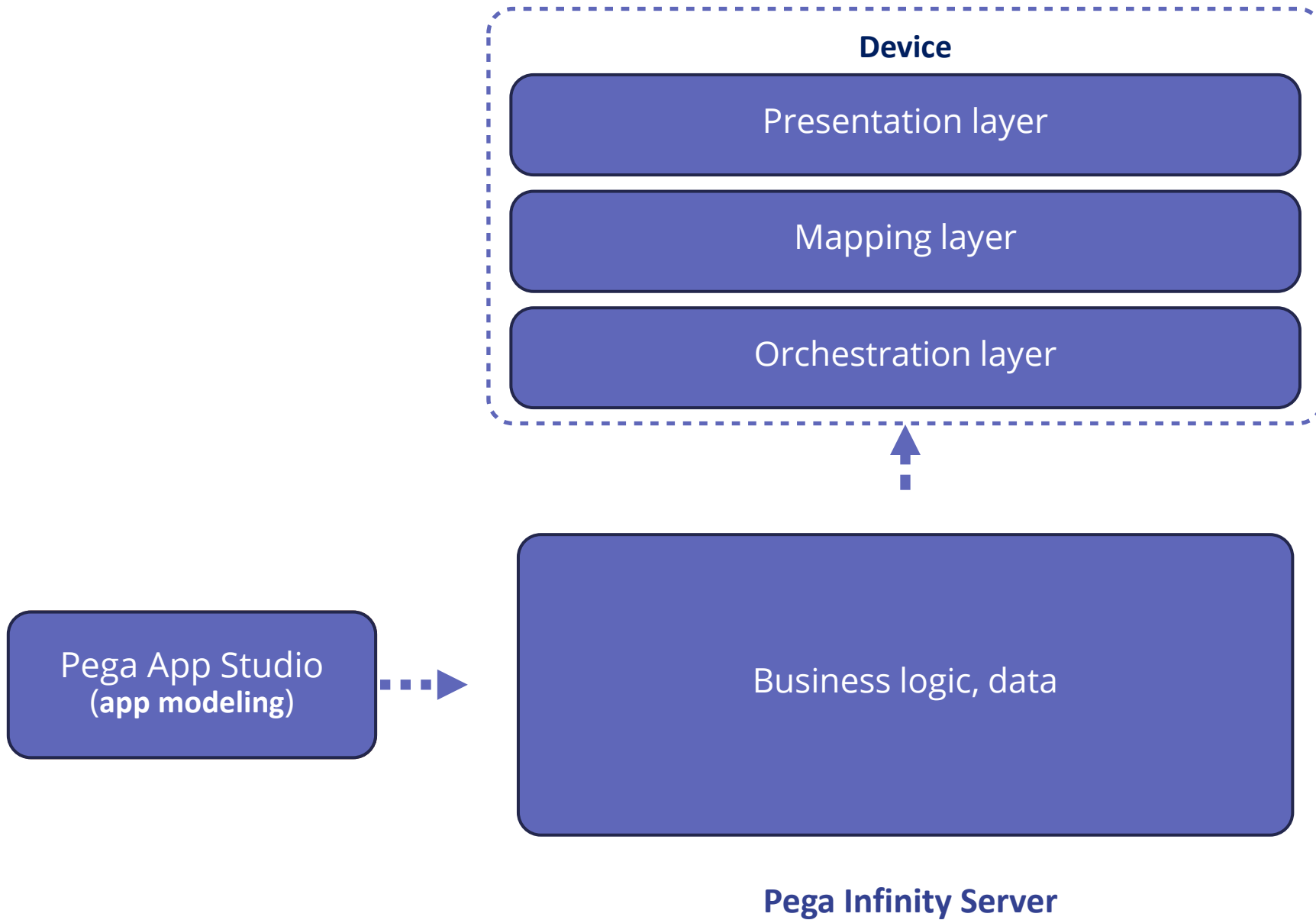




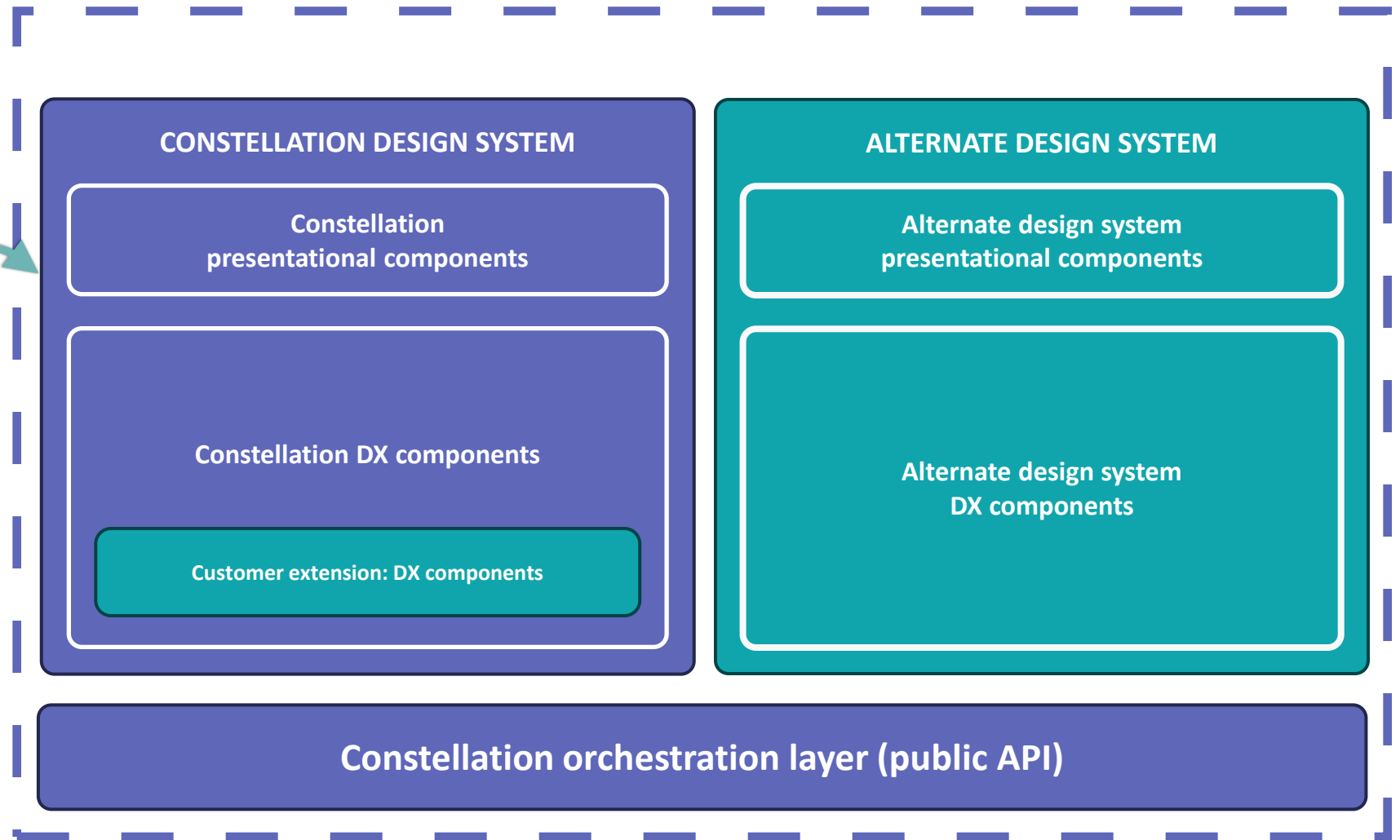
# Pega's current **architecture**









Constellation UI Service



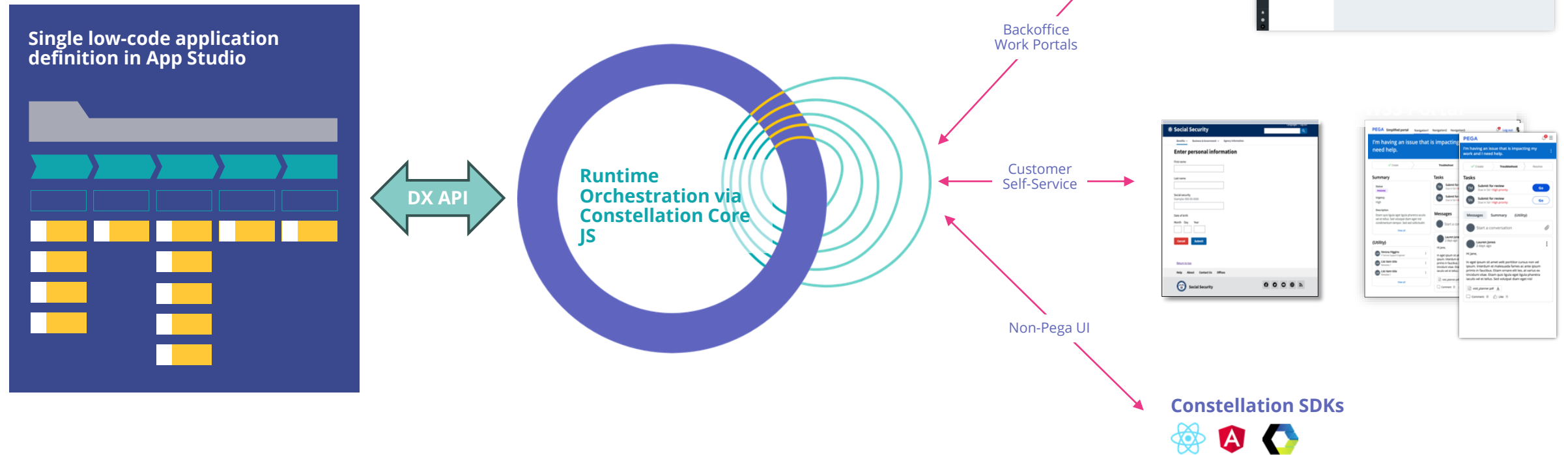
Constellation DX API

Pega Infinity Server

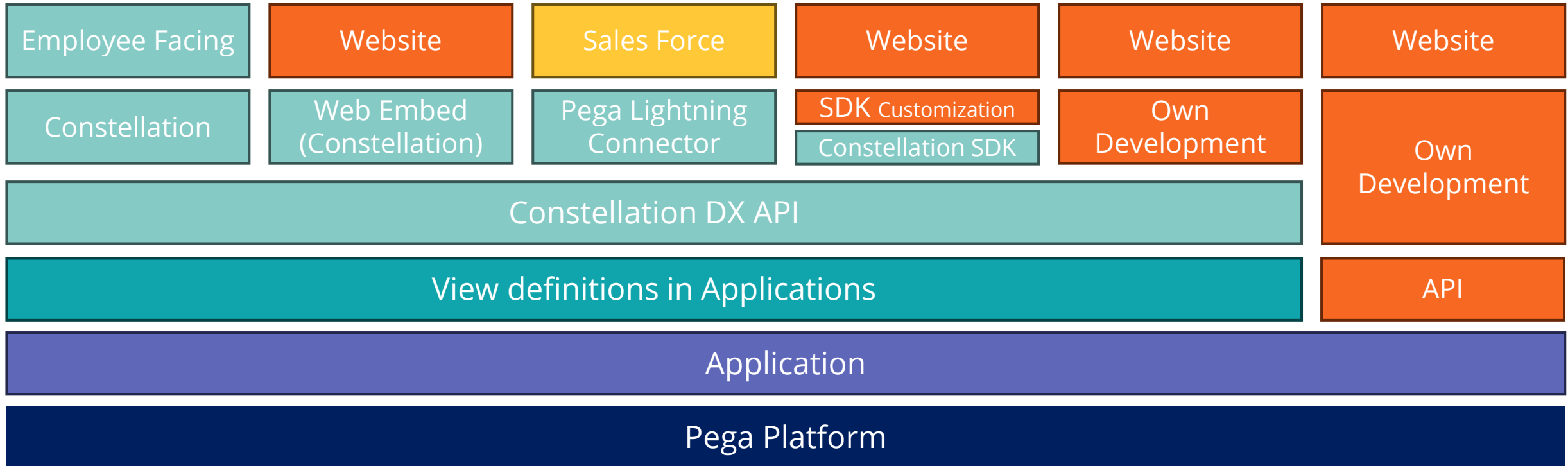
-  Pega
-  Your front end

# Work from the center out

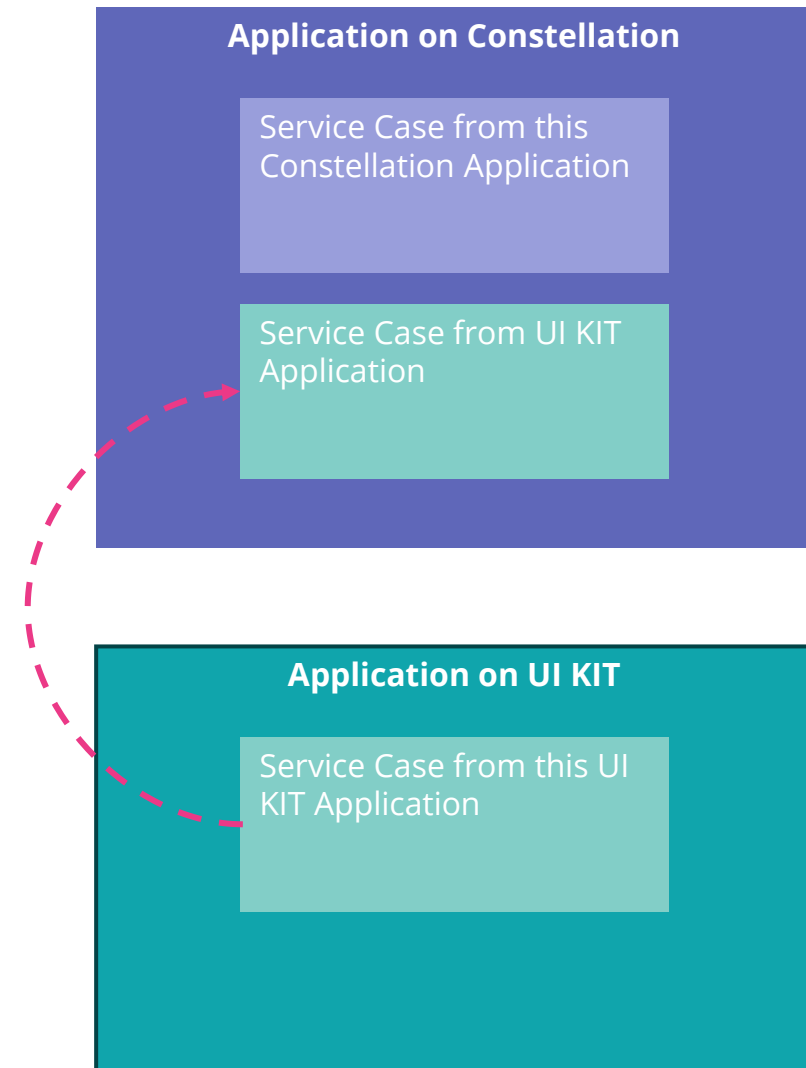
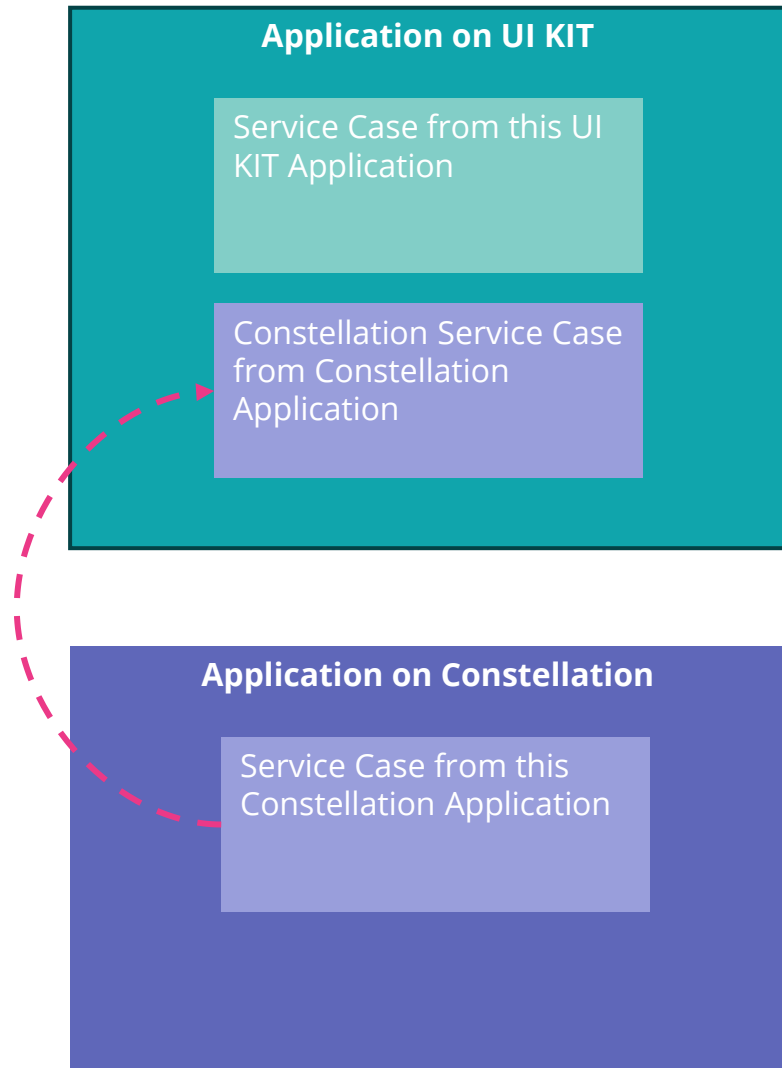
A modular architecture that separates business logic from UI



# Constellation architecture

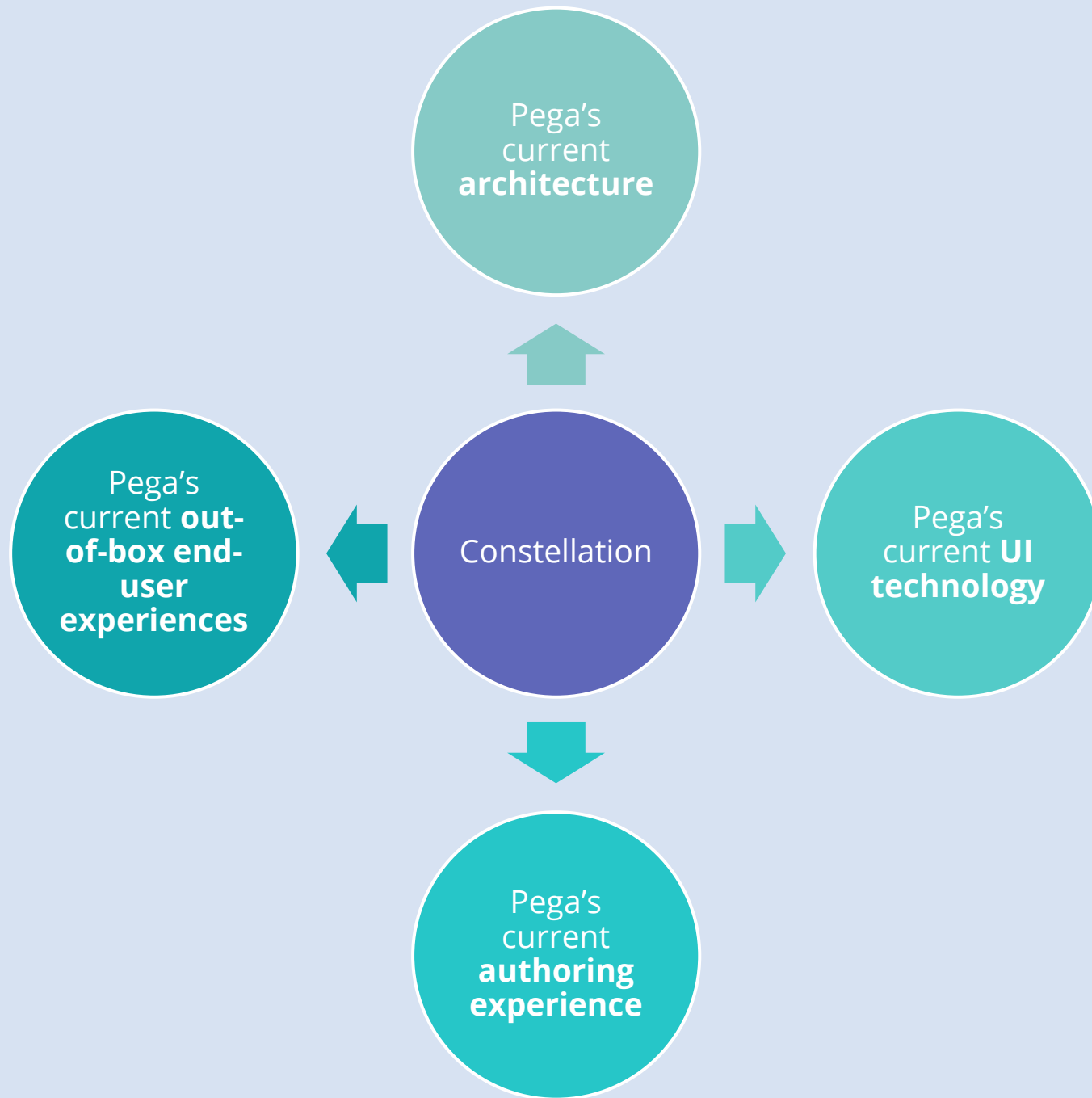



# UI-Blending





# Pega's current **architecture**





Pega's current **UI**  
**technology**





### Demo App

#### Announcements

We've launched a brand new experience to accelerate your workflow. Check out the guides to help you get the most of Cosmos.

- New React based UI rendering
- Support for followers and recents
- New authoring experience

[See what's new](#)

#### My Worklist 3

**Personal details**  
Task in Car Insurance quote (C-156009) • **PENDING-FULFILLMENT** • Urgency 10 [Go](#)

---

**Enter personal info**  
Task in Request a benefit verification letter (B-42069) • **NEW** • Urgency 10 [Go](#)

---

**Personal details**  
Task in Car Insurance quote (C-156005) • **PENDING-FULFILLMENT** • Urgency 10 [Go](#)

#### My followed items

Case ID	Label	Status	Priority
No records found.			

#### Pulse

- DU** Start a conversation
- RM** richard marsot 2 2 months ago  
richard marsot main test  
[Comment](#) [Like](#)
- RM** richard marsot 2 2 months ago  
richard marsot 7 joe smith 5 test  
[Comment](#) 1 [Like](#)
- RM** richard marsot 2 2 months ago  
richard marsot 2 test  
[Comment](#) [Like](#)
- PEGA** richard marsot main 2 months ago  
richard marsot 2 test  
[Comment](#) [Like](#)

## Autoverzekering aanvragen

### Situatie

### Autogegevens

Kenteken \*

Bedrag voor accessoires \*

Verwachte afleverdatum \*

Dit is ook de ingangsdatum voor de verzekering.

**Gegevens hoofdbestuurder**  
Dit is de persoon die het meeste in de auto rijdt.

Geboortedatum \*

Auto van de klant  
**OPEL Astra Sports Tourer**

Kenteken	H-047-VF
Brandstof	Benzine
Bouwjaar	2020

**ADVIES**

	WA + Volledig Casco 1 jaar	WA + Volledig Casco 3 jaar	WA + Volledig Casco 5 jaar
Premie per maand	€ 71,57	€ 80,13	€ 86,63
Schade aan derden	✓	✓	✓
Ruitschade en ruitvervangning	✓	✓	✓
Brand-, storm- en natuurschade	✓	✓	✓
Diefstal, inbraak en joyriding	✓	✓	✓
Aanrijding en vandalisme	✗	✓	✓
Slippen, omslaan en te water raken	✗	✓	✓
Nieuwwaarderegeling	tot 1 jaar	tot 3 jaar	tot 5 jaar
Occassionwaarderegeling	tot 1 jaar	tot 3 jaar	tot 5 jaar
Vervangend vervoer tijdens reparatie	5 dagen	30 dagen	30 dagen
Eigen risico reparatie binnen schadenetwerk	€ 250,-	€ 0,-	€ 0,-
Eigen risico reparatie buiten schadenetwerk	€ 500,-	€ 500,-	€ 500,-
	<a href="#">Kiezen</a>	<a href="#">✓ Gekozen</a>	<a href="#">Kiezen</a>

Autoverzekering voor  
**OPEL Astra Sports Tourer**

---

Samenvatting  
WA + Volledig Casco 3 jaar **€ 80,13**

**Premie per maand € 80,13**  
De premie is inclusief € 13,91 assurantiebelasting en € 8,64 distributiekosten.

No-claim korting : 82,5% (10 schadevrije jaren)

[Premieberekening mailen](#)

2

### Collect Personal Details

#### Your Data

Answer the questions and see how you are doing with your mortgage. We ask for your details

to see how much you can borrow on 01-07-2034. This is the end date of your mortgage.

See your (expected) state pension date at [svb.nl](#).

As from which date do you receive pension and state pension?

18-10-2024



What is your current sort of income?

Social security



Are you living together with a partner?

Yes

No

Do you have pledged life insurances? Or an investment insurance or account?

The mortgage deed states whether your insurance or account is pledged (linked) to your mortgage. Bank life insurance does not count in this case.

Yes

No

Don't know

We have found the information below regarding the BKR registration and your home.

#### Collateral details

BKR registration  
No registration found  
€ 535,000,00

Collateral valued on



Energy label home

A++

Bkr registration  
No registration found

Cancel

Save for later

Previous

Next

### Collect Personal Details

#### Your Data

Answer the questions and see how you are doing with your mortgage. We ask for your details to see how much you can borrow on 01-07-2034. This is the end date of your mortgage.

See your (expected) state pension date at [svb.nl](#).

As from which date do you receive pension and state pension?

MM / DD / YYYY



What is your pension income?

€

What is your current source of income? \*



What is your current income?

€

Are you living together with a partner? \*

Yes  No

Do you have pledged life insurances? Or an investment insurance or account? \*

Yes  No  Don't know

The mortgage deed states whether your insurance or account is pledged (linked) to your mortgage. Bank life insurance does not count in this case.

We have found the information below regarding the BKR registration and your home.

BKR registration —

#### Credit Registration List

Type of Credit	Amount	Kind
Collateral value	€535,000.00	
Collateral valued on	Nov 26, 2023	
Energy label home	A++	

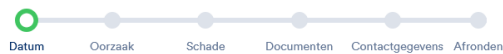
Collateral value tooltip

Is the home value we are calculating with incorrect? [Please provide us with a new home value here.](#)

Cancel

# Schade melden

Aansprakelijkheidsverzekering



## Wanneer ontstond je schade?

Weet je het niet precies? Kies dan de datum waarop je de schade ontdekte.

Wanneer ontstond je schade?

Volgende →



## Schade melden


### Wanneer ontstond de schade?

Weet je de precieze datum niet? Kies dan de datum waarop je de schade ontdekte.

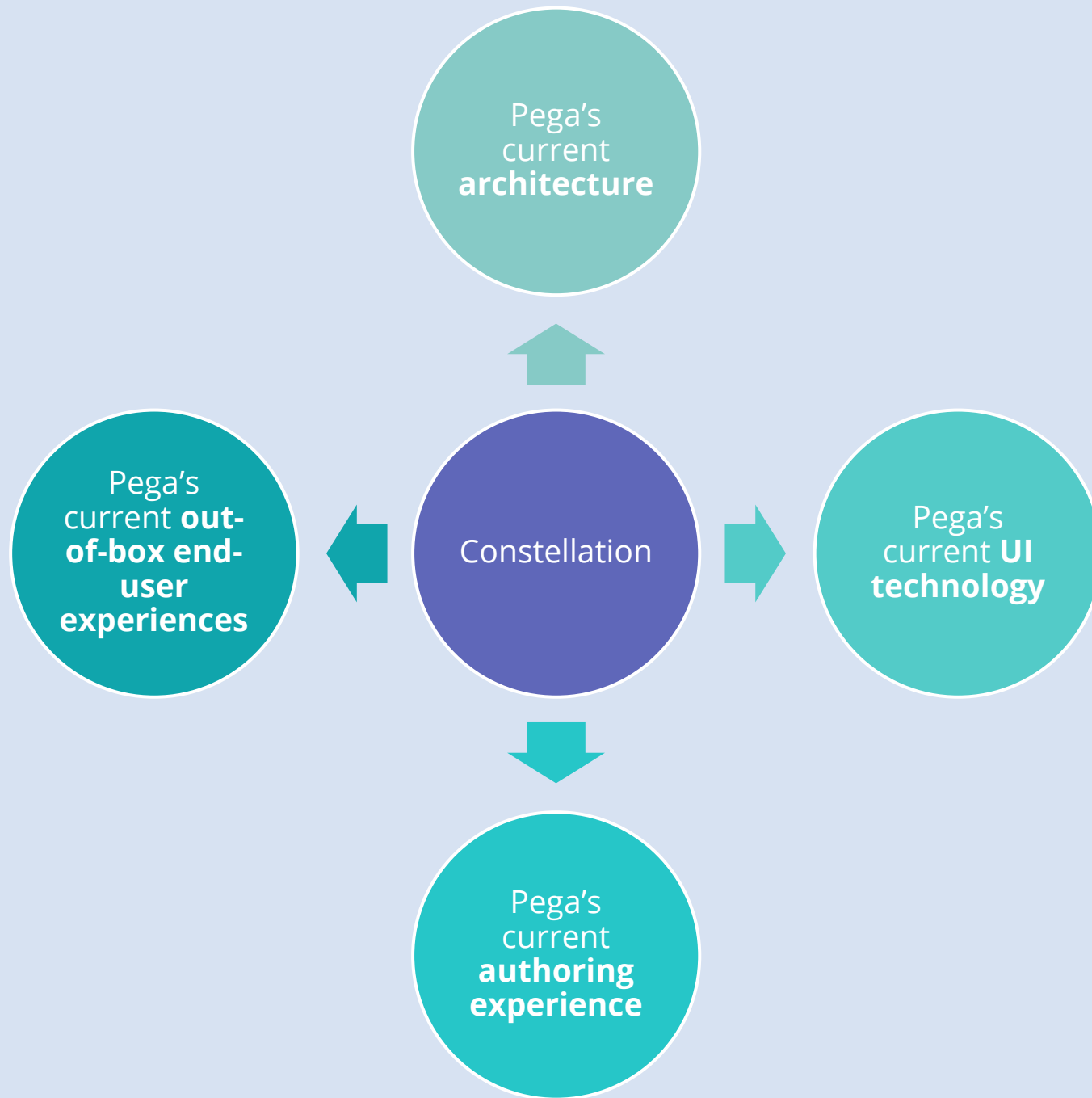
Volgende >

Feedback

PS C:\Users\bessp\Documents\DXCB> |



Pega's current **UI**  
**technology**





Pega's current  
**authoring  
experience**



# Build fast and maintain with ease

Form-based UI configuration in App Studio

# 50%

Faster to develop  
compared to traditional  
drag and drop UI builders

Based on early adopter feedback

The image displays three overlapping screenshots of the Pega App Studio interface. The top screenshot shows the 'Workflow' configuration for a 'Service' case type, with stages '1. New Service', '2. Connected', and '3. Resolved'. The middle screenshot shows the 'Branding and Themes' configuration for 'C11n Gallery', with various theme settings like 'Theme name', 'Branding', 'App background', 'Card background', 'Nav background', 'Interactive items', 'Link', 'Main text', 'Border', 'Input border', 'Avatar background', 'Base font', 'Font family', 'Card border radius', 'Button border radius', and 'Input border radius'. The bottom screenshot shows an 'AXE Report' with a table of violations and tests.

Component	Category	Count
color-contrast-enhanced		41
color-contrast		17
nested-interactive		6
aria-allowed-attr		6
landmark-one-main		5
page-has-heading-one		5
duplicate-id-aria		4

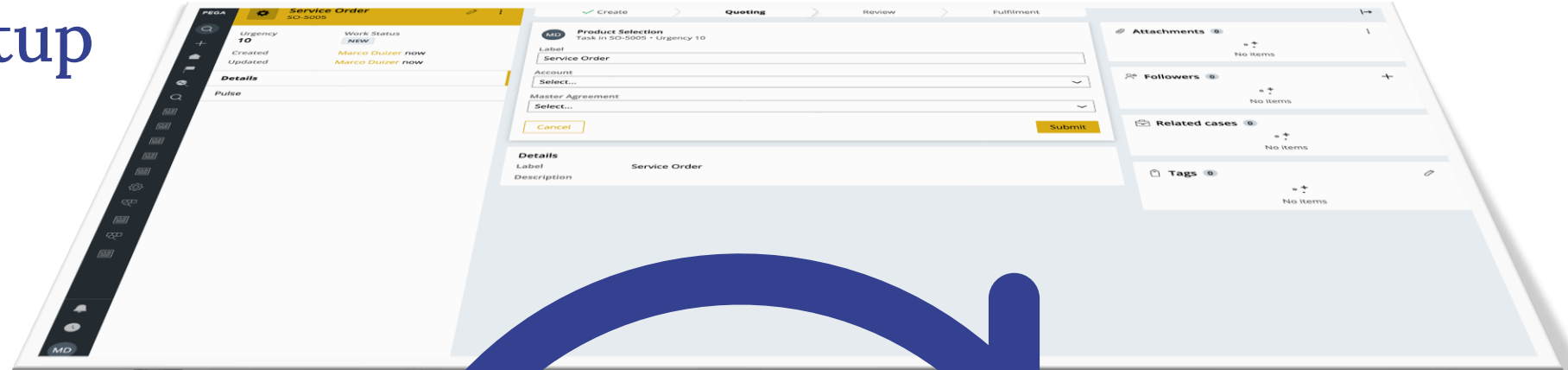


How?

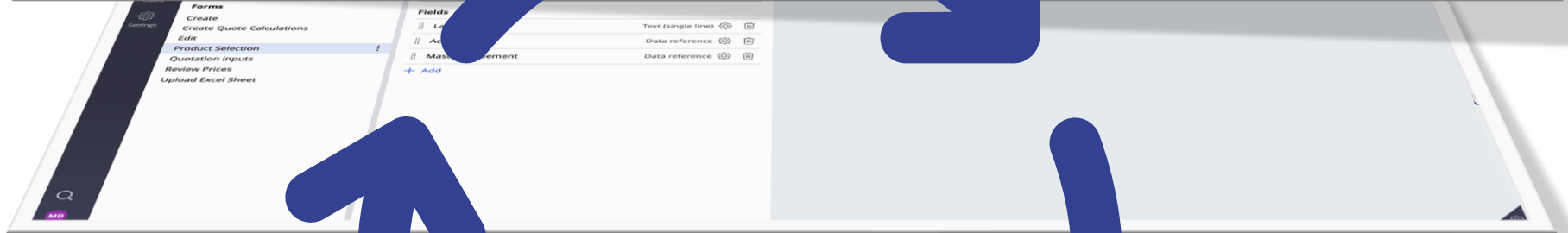


# Constellation setup

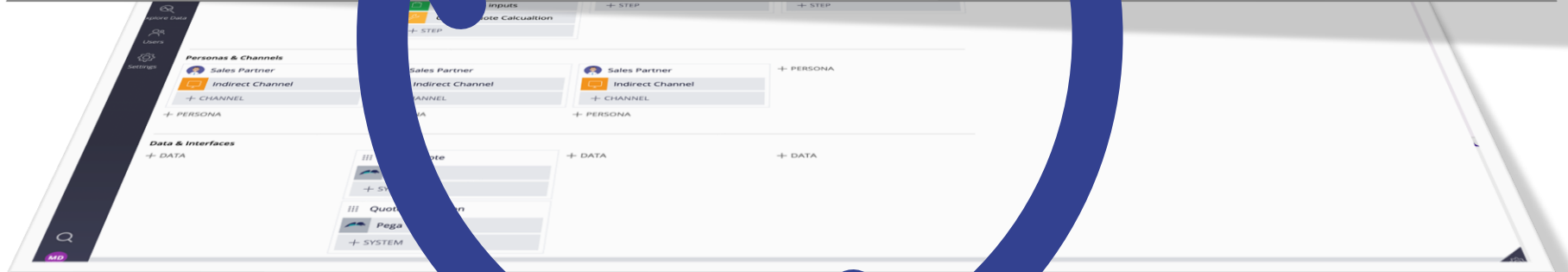
Result



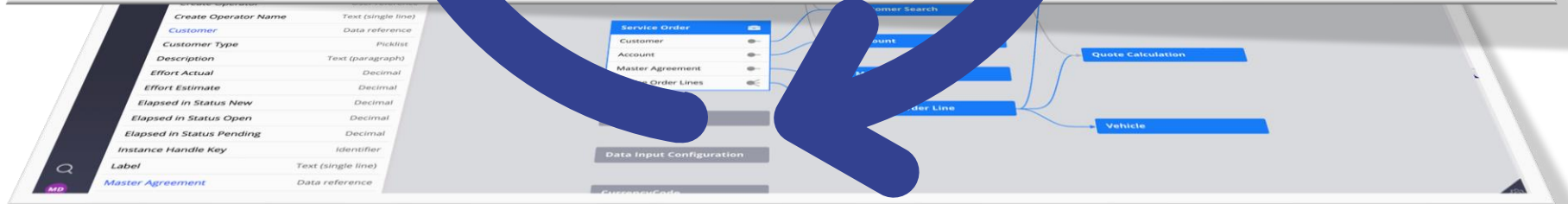
Form Views

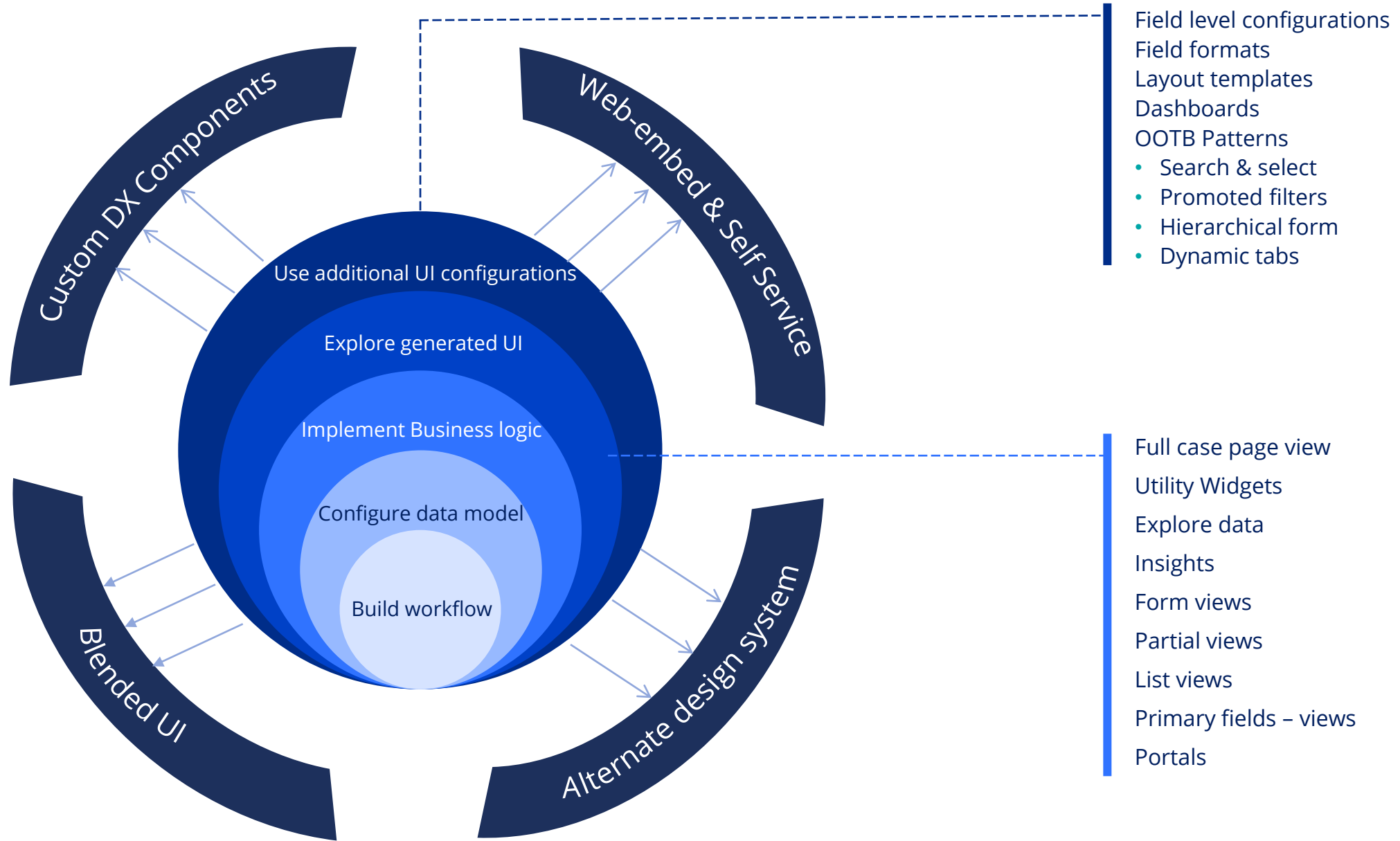


Customer/Micro Journey



Data Model

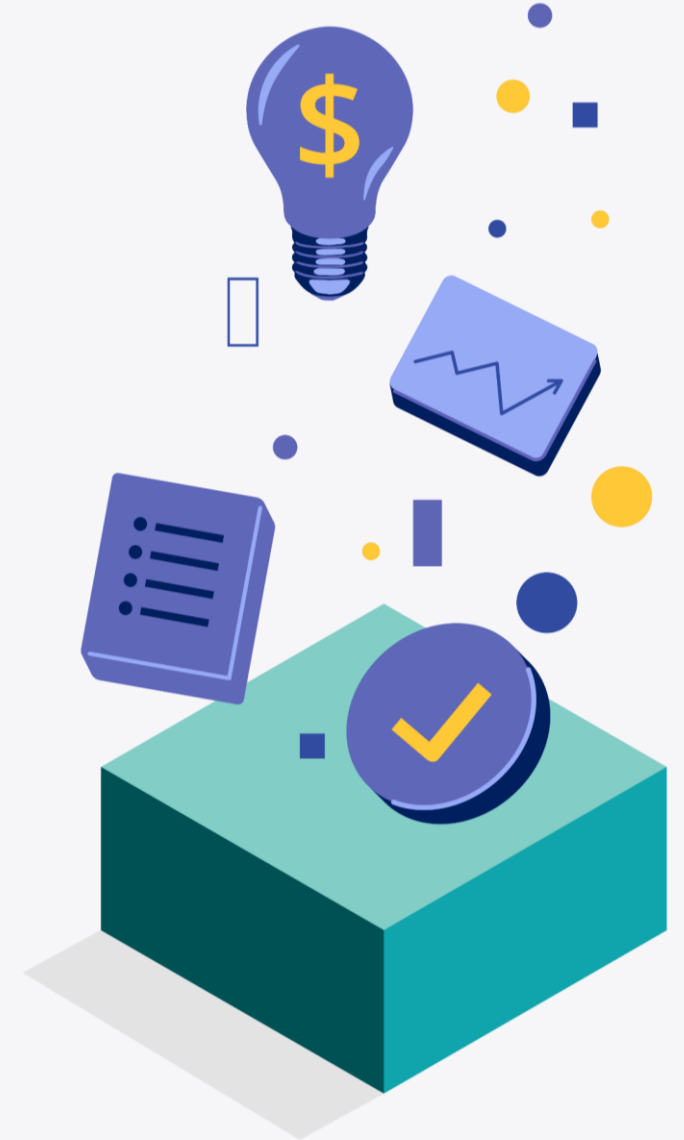






# Common UI patterns

Save time by using patterns

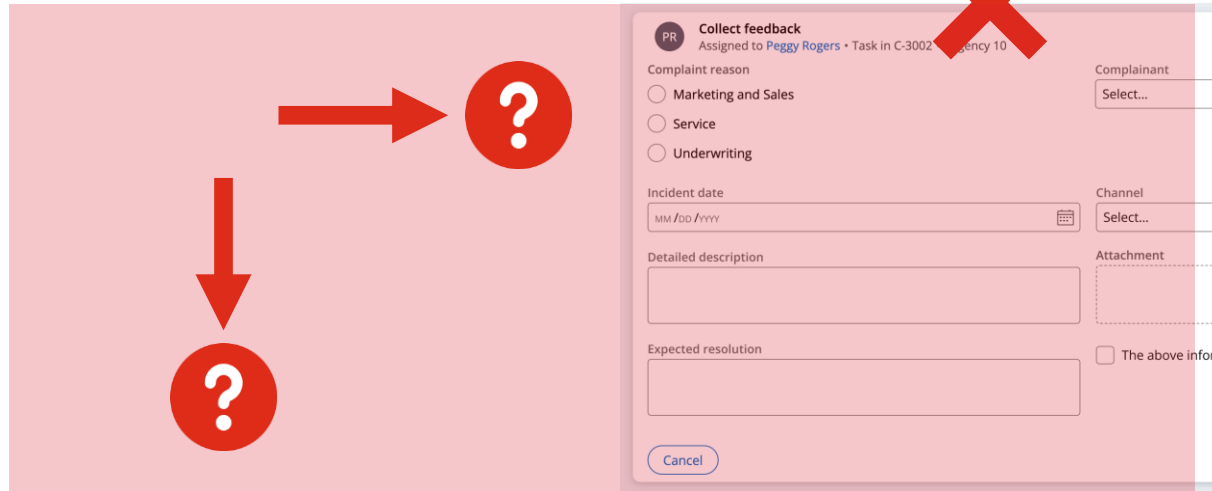


# Using UI Paterns

# Form authoring with Usability in mind

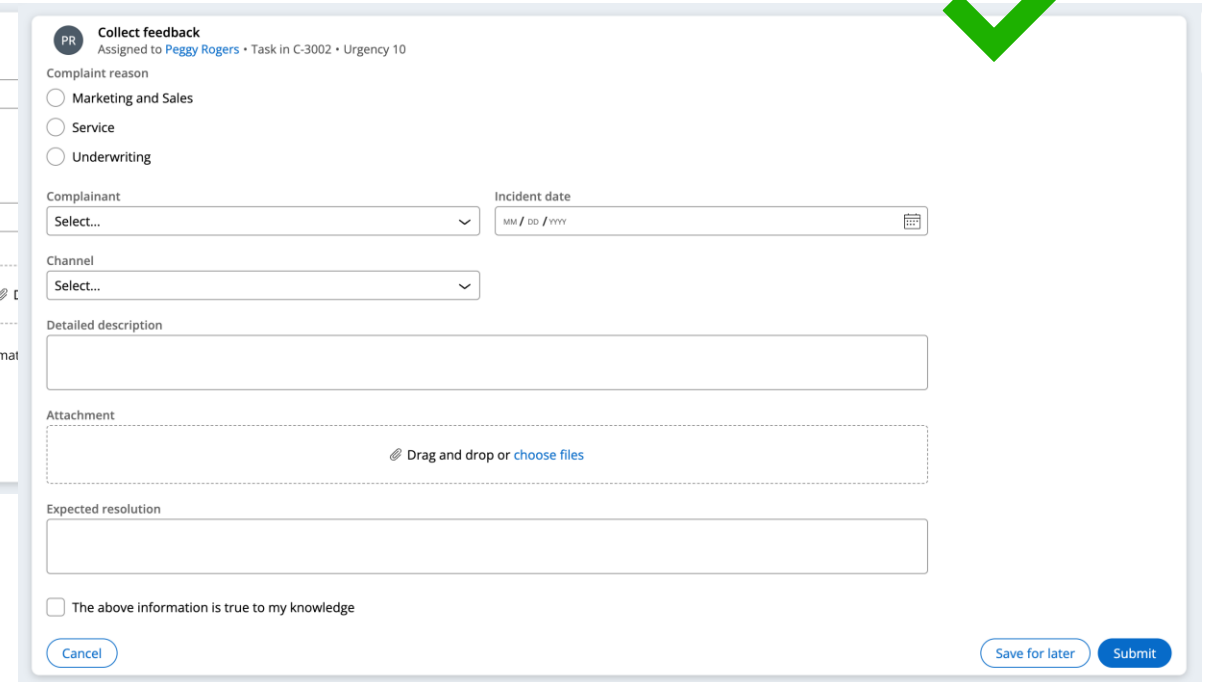
There is a reason it's not in two columns on row 1

Unclear grouping



A screenshot of a form titled "Collect feedback" with a red background. The form is divided into two columns. The left column contains "Complaint reason" (radio buttons for Marketing and Sales, Service, Underwriting), "Incident date" (text input with calendar icon), "Detailed description" (text area), and "Expected resolution" (text input). The right column contains "Complainant" (text input), "Channel" (text input), "Attachment" (text area), and a checkbox "The above information is true to my knowledge". A red "X" is placed over the top right of the form. A red arrow points from a question mark icon to the "Complaint reason" section, and another red arrow points from a question mark icon to the "Expected resolution" input.

Easy to understand



A screenshot of the same "Collect feedback" form with a light blue background. The form is organized into a single column with clear visual grouping. The "Complaint reason" section is at the top. Below it are "Complainant" and "Incident date" in a row. Then "Channel" and "Detailed description" in a row. The "Attachment" section is a large dashed box with "Drag and drop or choose files". Below that is "Expected resolution". At the bottom is a checkbox "The above information is true to my knowledge", "Cancel", "Save for later", and "Submit" buttons. A green checkmark is in the top right corner.

Create forms with default templates

Intuitive form design built into authoring

# "Search and Select" UX for list data

Boost efficiency in searching for and locating records within list data.

- Use App Studio to configure:
  - “Search categories”
  - “Search Group” and their related search fields.
  - Default values and cascading effects between search fields
- “Search group” fields now support all scalar field types and will render the appropriate form input.

### Runtime experience

Interaction

Search for customer

Enter search criteria and select the customer from the search results

Search for  
 Service account information  Customer information

Search by  
Last name, First name and D.O.B

Last name \*  
Smith

First name \*  
Steve

D.O.B \*  
08/20/1995

Reset Search

Search results

Last name	First name	Email	Phone number	SSN/National ID	Address
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	Wellesley MA The Florist HQ - Natick
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	
Smith	Steve	steveRsmith@sample.com	+914049212907	****6788	

Cancel Fill form with AI Submit

Example of “Search and select” in Pega Customer Service

### Authoring experience

Input settings

Mode  
Single-select

Display as  
Advanced search

“Search for” categories

- Service account information
- Customer information

+ Add

Parameters

Profile \*  
Constant Consumer

searchCriteria  
Constant

Search groups

- Last name, First name and D.O.B Search group
  - Last name Text (single line)
  - First name Text (single line)
  - Birth date Date only
- Phone number or Email or SSN/N Search group
  - Contact phone number Phone
  - Contact email Email
  - National id Text (single line)

+ Add

Columns

- Last name Text (single line)
- First name Text (single line)
- Contact email Email
- Contact phone number Phone
- National id Text (single line)



# Hierarchical Forms

Improve case worker productivity in managing large forms with many fields

- Use App Studio and Hierarchical form template to organize form fields into logical groups for easier navigation.
- Designed for entering lots of form data non-sequentially over time.
- Guide users to tabs that need attention before moving on to the next Step.

## Runtime experiences

The screenshot shows a runtime form titled "Capture KYC details" with a progress indicator at the top showing "Create" (checked), "Doing", and "To do". Below the title, there are four tabs: "Questions", "Associated parties", "Account selection", and "Account details". The "Questions" tab is active, showing a section titled "Internal audit" with a sub-section "Initial proposed transactions". This section contains five questions, each with "Yes" and "No" radio button options: "Transfer of Account?", "Transfer of Seg Funds?", "Transfer of Securities?", "Transfer of Funds?", and "Action". The "Action" question has three options: "Buy", "Sell", and "N/A". Below the form, there is a "Prepare protocol" section with an error summary. The error summary lists several errors: "Protocol summary has errors" (including "Summary has errors" with sub-errors for "Protocol number. Cannot be blank.", "Compound number. Cannot be blank.", and "Title. Cannot be blank."), "Protocol synopsis has errors" (including "Objectives has errors" with sub-error "Primary Objective. Cannot be blank."), "Protocol summary", "Protocol synopsis", "Study design", "Study interventions", "Schedule of activities", and "Stopping R". At the bottom, there are input fields for "Protocol number" and "Compound number", both with "Cannot be blank" error messages.

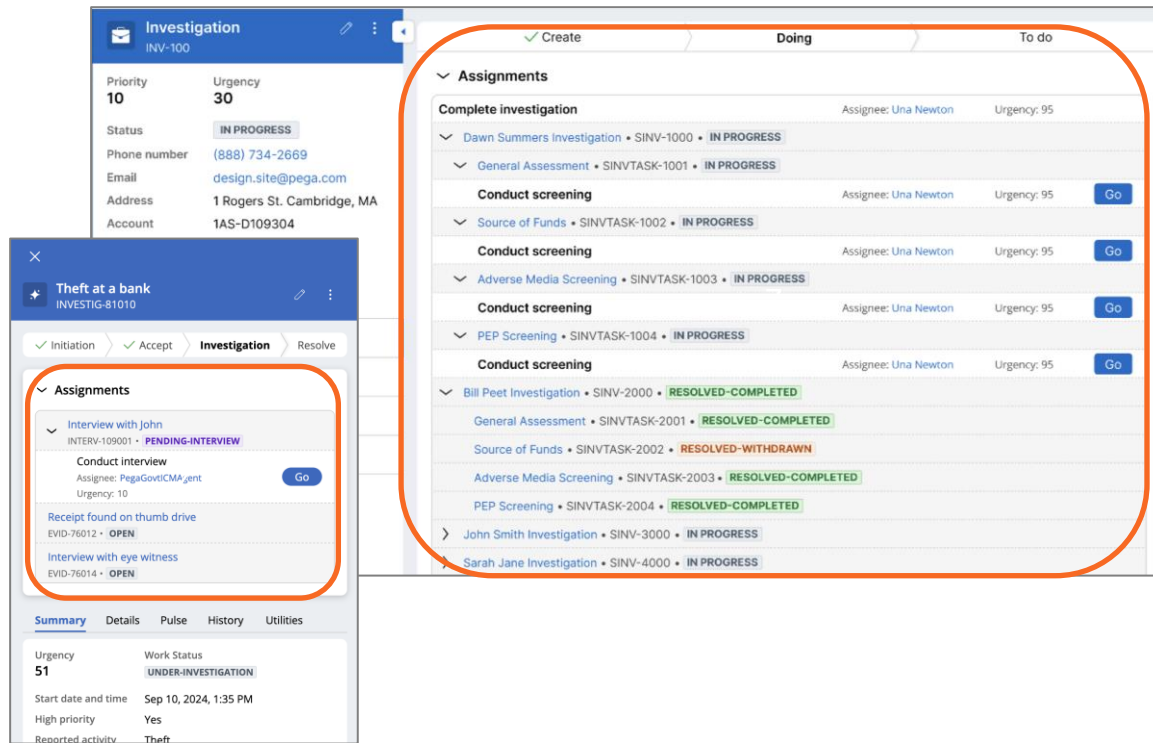
## Authoring experience

The screenshot shows the authoring experience for the "Capture KYC details" form. It features a "Template Hierarchical form" section with an "Edit" button. Below this, there are fields for "View label" (set to "Capture KYC details") and "Instructions" (set to "None"). The "Form groups" section lists four groups: "Questions", "Associated parties", "Account selection", and "Account details", each with a settings gear icon and a trash can icon. There is also an "+ Add" button at the bottom.

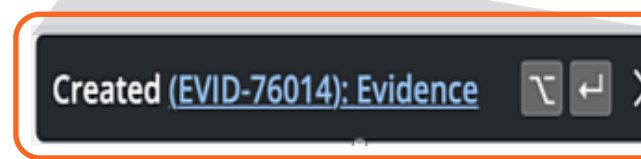
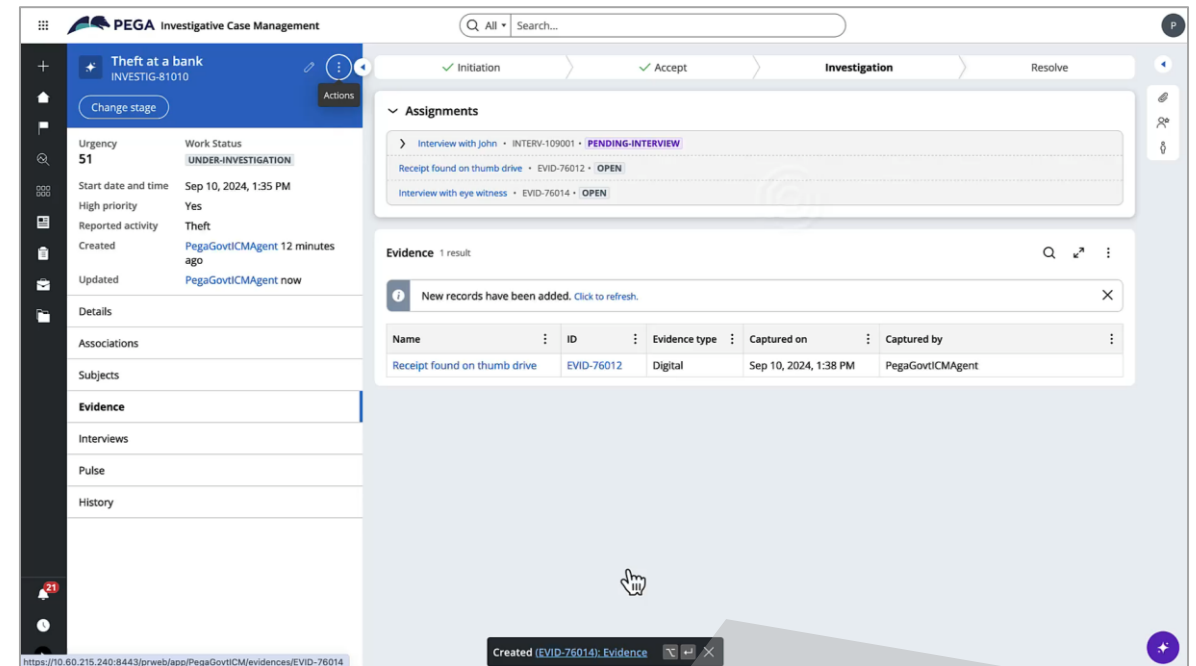
The authoring experience is Center-Out; it's agnostic of the presentation. Currently, Form groups render as tabs.

# Improved visualization and navigation of case's relationships

Enhance productivity by quickly understanding and accessing related work



## Navigate directly to new case in notification popup



Examples from Pega Government Platform (PGP)

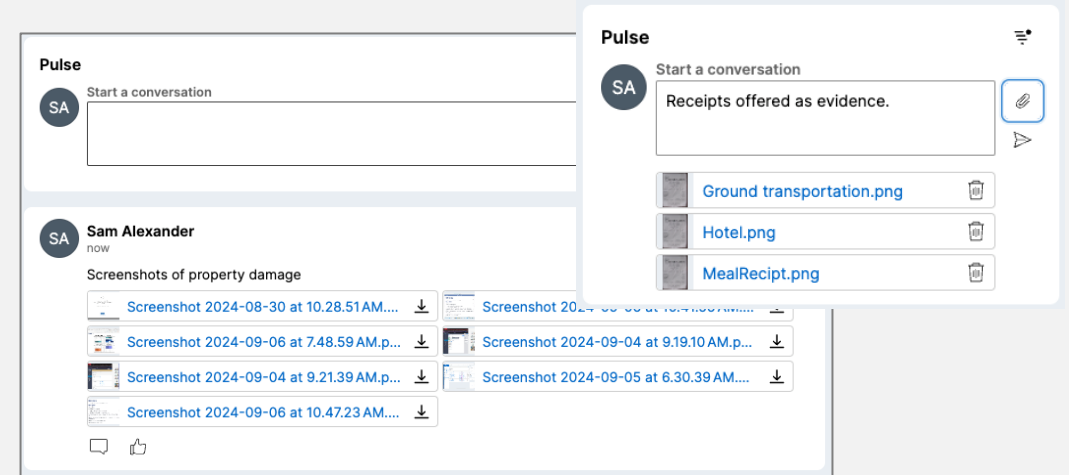
From an "Investigation" case, quickly see and navigate all related work.

From "Investigation" case, quickly create & navigate to child "Evidence" cases

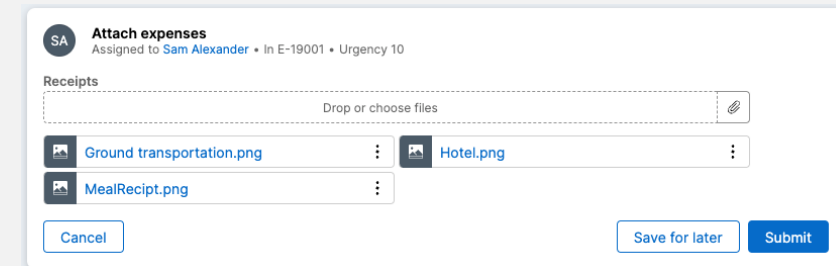
# Unified Attachment UX

Help users more efficiently manage attachments

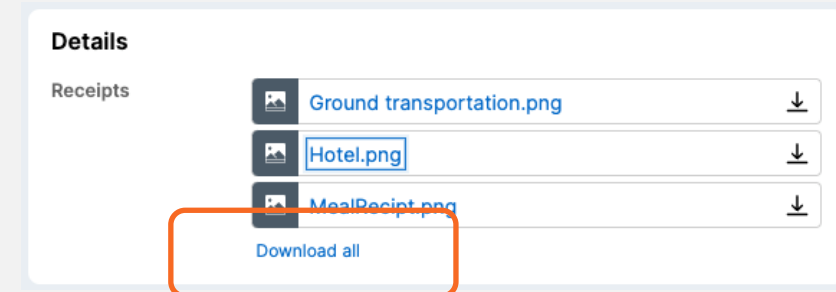
- Consistent experience for Previewing, downloading, and editing attachments across Forms, Views, and Pulse.
- Download all attachments with single click in read-only views.



Adding and viewing attachments in Pulse



Adding attachments in forms



Attachments in read-only views. "Download all" attachments with single click.

# Attachment fields on Embedded Data

Improving productivity, case workers can easily associate attachments with rows in a table.

- Embedded Data field types (Page or Page List) now support fields of type 'Attachment'.
- App authors can add attachment fields at any level within an embedded class in the case data model.

## Runtime experience

The screenshot shows a user interface for "Attach expenses" with a table of receipts. The table has columns for Category, Amount, and Receipt. The Receipt column contains "1 item" with a file upload icon. A tooltip "Drop or choose files" is visible over the icon in the third row.

Category	Amount	Receipt
Meal	\$45.00	1 item
Hotel	\$388.00	1 item
Airfair	\$850.00	1 item

Relating attachments to items in an Embedded Page List

Add Embedded Dta

## Authoring experience

The screenshot shows the App Studio interface for the "Expense" data object. The Data Model table is visible, showing fields like Amount, Category, Label, and Receipt. The "Attachment" field type is highlighted for the Receipt field.

Name	ID	Type	Options
Amount	Amount	Currency	
Category	Category	Picklist	Drop-down list
Label	pyLabel	Text (single line)	
Receipt	Receipt	Attachment	Category: Receipt

Create an Embedded Data structure with Attachment field.

The screenshot shows the App Studio interface for the "Expense Report" case type. The Data Model table is visible, showing fields like Receipts, Travel end date, and TravelEndDate. The "Embedded Data" field type is highlighted for the Receipts field.

Name	ID	Type	Options
Receipts	Receipts	Embedded Data	Expense
Travel end date	TravelEndDate	Date only	

Add Embedded Data field type to case's data model

The screenshot shows the configuration for the "Receipts" Embedded Data field. The "Display as" dropdown is set to "Table". The "Columns" section shows the field types for Category, Amount, and Receipt.

Columns	Type	Options
Category	Picklist	
Amount	Currency	
Receipt	Attachment	

Configure the form view.

# Delegation done in a different way

Loan types  
List LoanType ▾

➔ Add

Loan types 10 results

Loan name	Loan description
Personal Loan	These are unsecured loans for personal use, such as debt consolidation
Mortgage Loan	Specifically designed for purchasing or refinancing
Auto Loan	Used to finance the purchase of a
Student Loan	Aimed at funding educational expenses for student...
Business Loan	Offered to support small businesses or startups with capital needs.
Credit Card	Although not technically a loan, credit cards allow you to borrow money
Payday Loan	Short-term loans typically for small amounts, but often come with high
Home Equity Loan	Utilize the equity in your home as collateral to obtain a loan.
Lines of Credit	Pre-approved borrowing limits that can be used as needed.
Small Business Administration (SBA) Loan	Government-backed loans for small businesses.

➔ Edit  
➔ Delete

APP STUDIO Application: Loan Processing

Portal: Case management portal

Content Configuration

Landing pages

- Loan types
- Explore Data
- Home
- Self-service Main page
- My Work

Preview

Edit landing page: Loan types

Template: List page

List page title: Loan types

Enable Get next work

Use existing lists  Custom list page

Data page: List LoanType

Include all class fields in the Show/Hide menu

Default view: + Add

Display name: List LoanType

Template: Table

Columns:

- Loan name (Text (single line))
- Loan description (Text (single line))

+ Add

Column to take up remaining width: Default

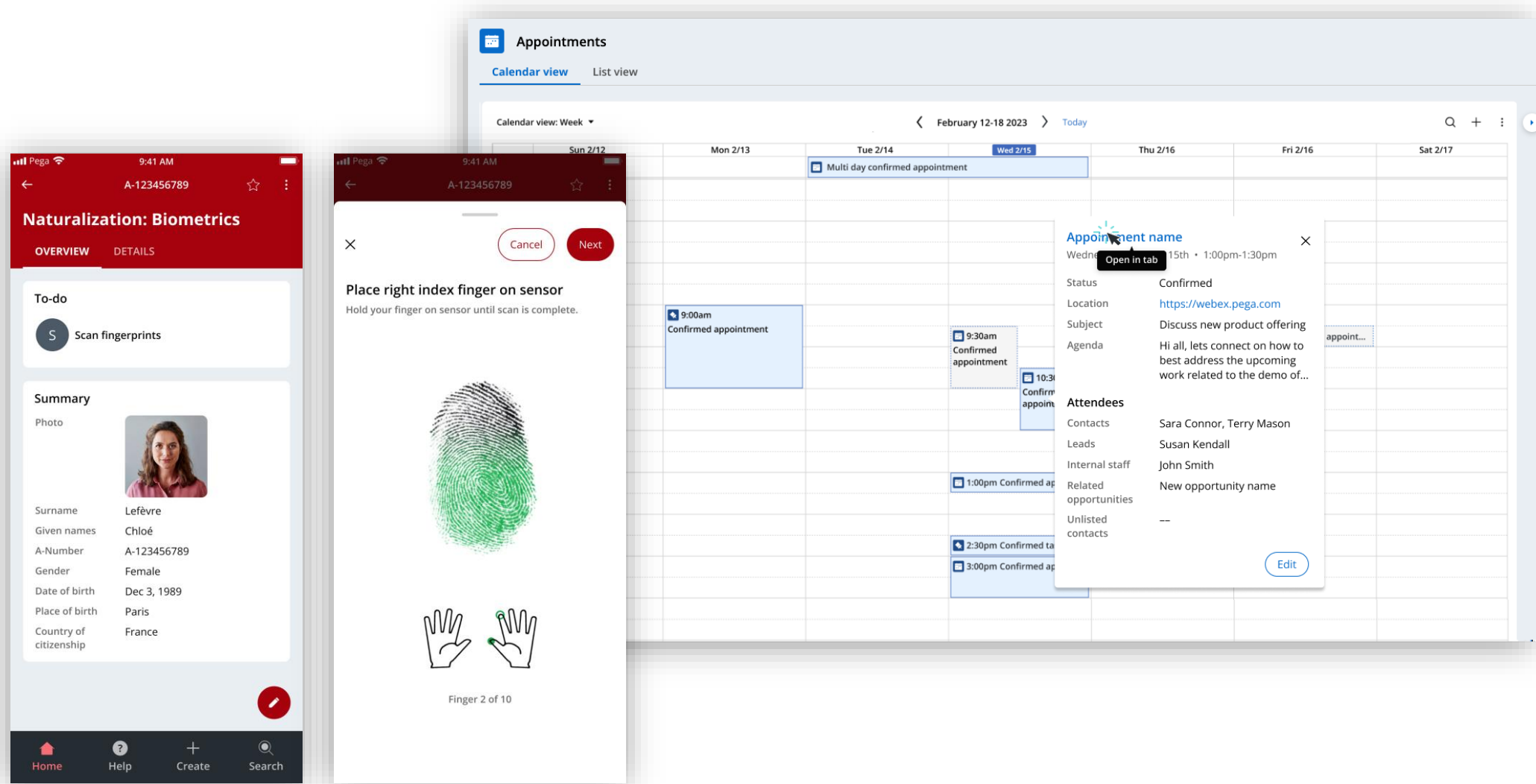
**Editing**

- Allow edit, delete and create

Allow

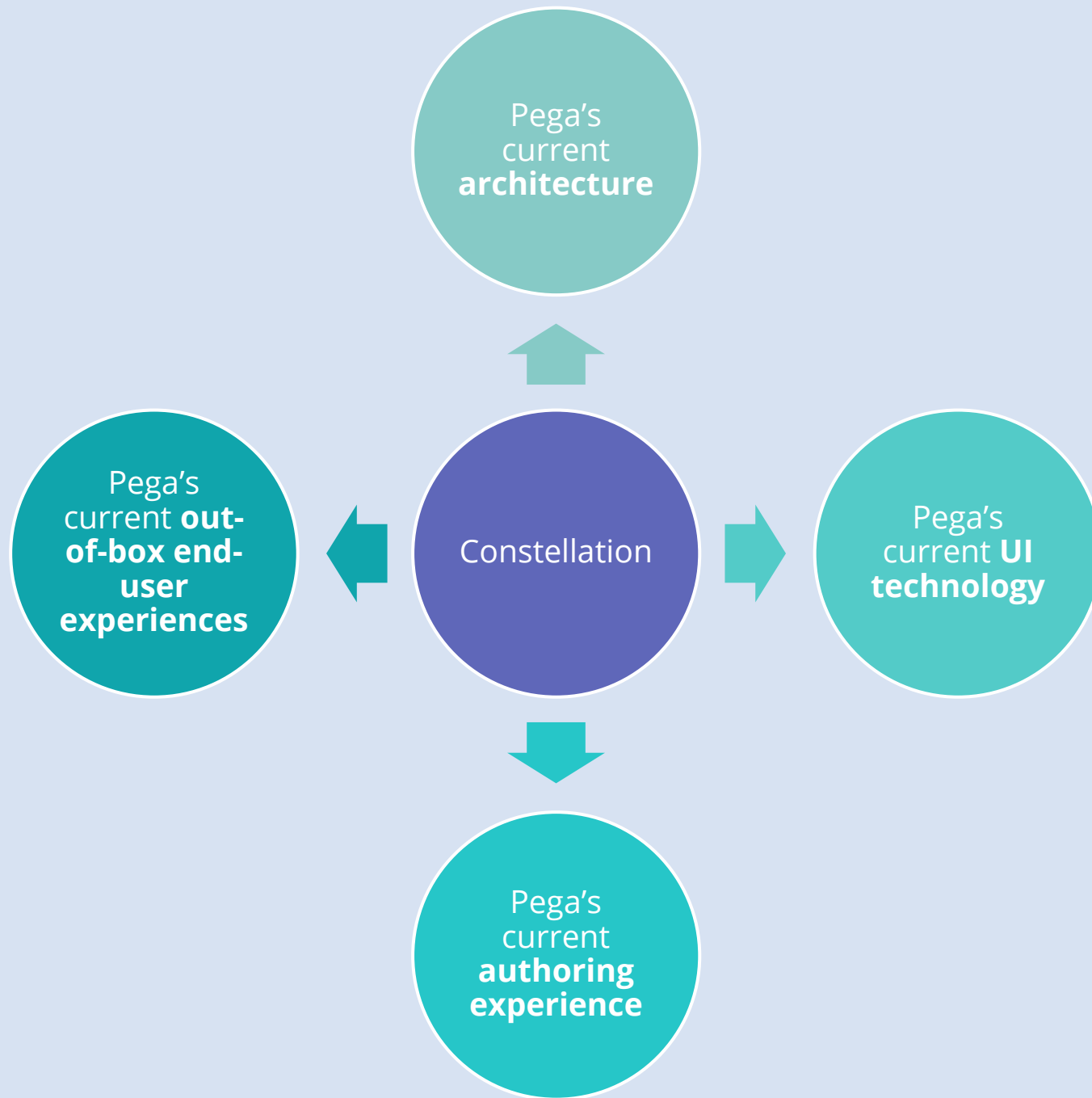
- Edit
- Delete
- Create and add to list

# Extensible: Create advanced components





Pega's current  
**authoring  
experience**

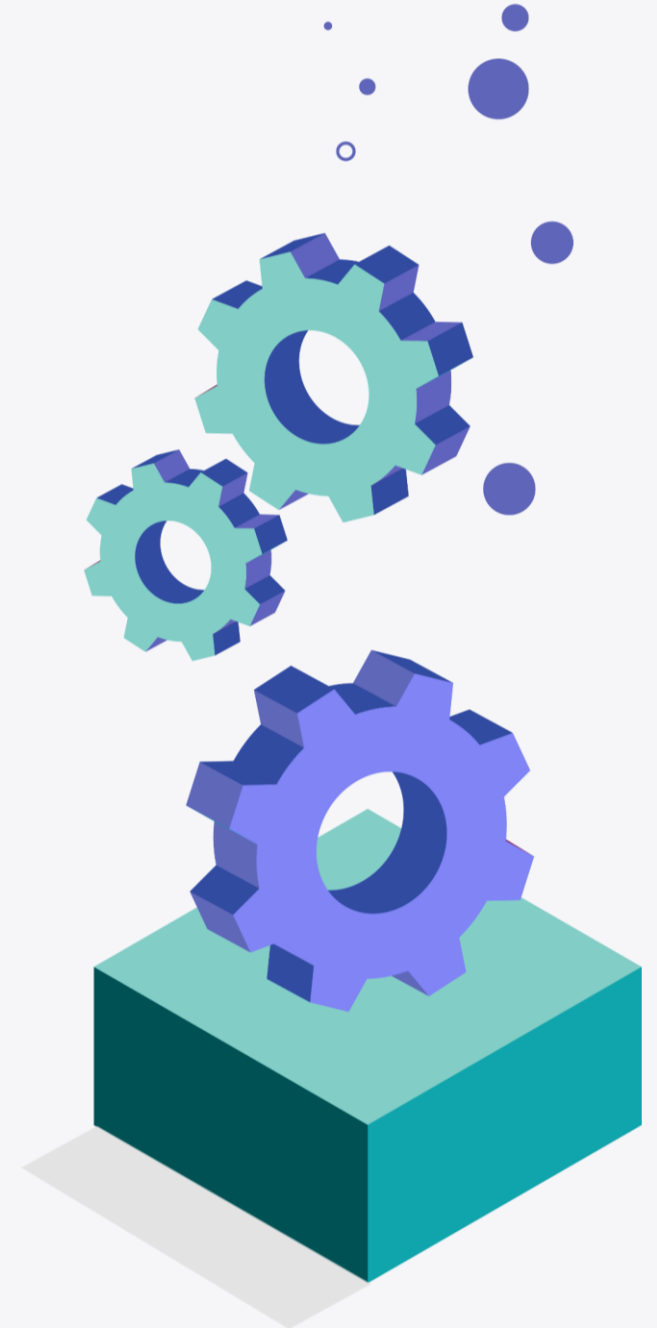






# Use what you have!

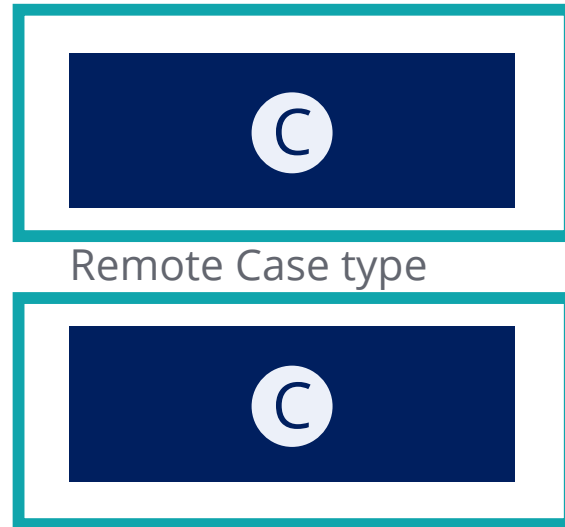
Save time by using what's already available



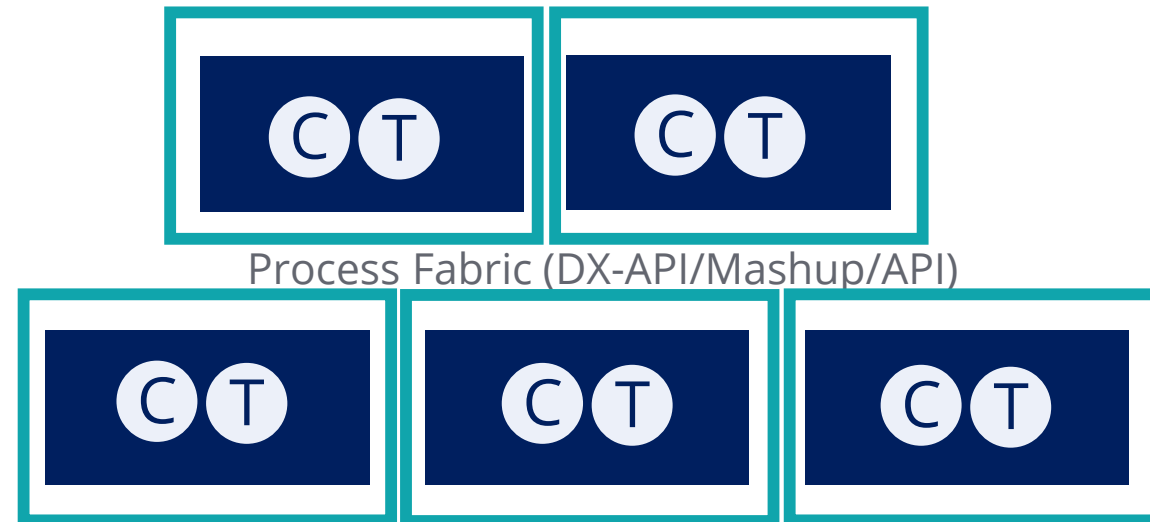
# Options to combine UI architecture



<https://docs.pega.com/bundle/platform/page/platform/user-experience/adding-traditional-case-constellation.html>



<https://docs.pega.com/bundle/platform/page/platform/case-management/remote-case-types.html>



<https://docs.pega.com/bundle/pega-process-fabric-hub-311/page/platform/pega-process-fabric/introduction-pega-process-fabric.html>

 Constellation UI architecture

 Traditional UI architecture

 Pega Instance

# Combining UI architectures

## FULL CONSTELLATION PORTAL

The screenshot shows a dashboard for 'UBank Loans and Services'. It features a 'COMMON HEADER' with a search bar and a 'COMMON NAVIGATION' sidebar. The main content area is divided into a 'UNIFIED WORKLIST' and a 'COMMON PULSE'. The worklist contains a table of cases with columns for Case ID, Label, Status, and Priority. The pulse shows a conversation with John Brown.

Case ID	Label	Status	Priority
C-2593	Project Alert	IN PROGRESS	25
C-403	Global Giving	IN PROGRESS	25
C-1155	Action Institute	IN PROGRESS	10
C-2400	ACME Studios	BLOCKED	10
C-777	Acumen Fellowship	IN PROGRESS	10
C-859	Guttmacher Institute	IN DANGER	10
C-1626	Houston Endowment	PENDING	10

## CONSTELLATION CASE TYPE

This screenshot shows a 'Capture' form for a case titled 'Norris Martinez'. The form includes fields for 'Applicant personal information' such as Prefix, First name, Middle name, Suffix, Name on card, Email, and Date of birth. It also has a 'Submit' button and a 'Cancel' button.

## UI-KIT CASE TYPE

This screenshot shows a 'Capture' form for a case titled 'Securesmarter'. The form includes fields for 'Organization contact update' such as Prefix, Title, First name, Middle name, Suffix, Name on card, Email, and Date of birth. It also has a 'Submit' button and a 'Cancel' button. A sidebar on the right shows 'Case details' with user information.

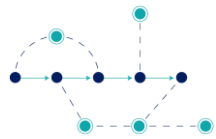


# Where? (to start)



# Move to Constellation

Pega Process Mining



Export

Pega GenAI Blueprint™



New Project



Import

## Current Applications

The screenshot shows a Pega application interface with a sidebar on the left containing a 'Case life cycle' menu. The main area displays a 'Request updates' form with fields for 'Request updates', 'Requester Email', and 'Requester Name'. Below the form, there are several tables or lists of data, including one with columns for 'Name', 'Assessment', and 'Request'.

Assistant

## New Constellation Applications

The screenshot shows a Pega application interface with a sidebar on the left containing a 'Case life cycle' menu. The main area displays a 'Request updates' form with fields for 'Request updates', 'Requester Email', and 'Requester Name'. Below the form, there are several tables or lists of data, including one with columns for 'Name', 'Assessment', and 'Request'. The interface also shows a 'New Constellation Applications' section with a 'Case lifecycle' menu and a 'Request updates' form.

# Constellation modernization assistant

## Market place

**Application Modernization Assistant** v1.0.3

Select the list of applications to analyze

AGConst
  Healthcare Appeals and Grievances Application
  Foundation for Healthcare Core Application
  RxNorm drug data store
  Healthcare Codes Management Application

[Run analysis](#)

---

**Modernization summary for**  
 AGConst, Healthcare Appeals and Grievances Application, Foundation for Healthcare Core Application, RxNorm drug data store, Healthcare Codes Management Application ↻

Overview [Issues by type](#) [Issues by rule](#)

✔ **91.29% of your application is ready to migrate**

Rules ready for migration 30,943

Rules to be reviewed 2,952

**Are you ready to migrate to Constellation UI?**

Click the button below, enter an application name and the tool will create a new application built on top of your current application. The tool will generate the views from your section rules in a dedicated ruleset and will address some of the issues reported during analysis.

[Migrate my application](#)

---

**Application Complexity**

Case types	23
Process flows	173
Flow actions	353
Data pages	763
Automations	2,557
Sections	1,970
Properties	12,125
Other	15,931

**Do you need help modernizing your application?**

Contact Pega Consulting Solutions Group to discuss your needs for modernization. To initiate the engagement, send an email to [ModernizeMe@pega.com](mailto:ModernizeMe@pega.com) with a screenshot of the analysis and the list of issues.

Each Pega Modernization Assessment is led by a Pega Project Delivery Leader and Technical Architect who will engage Sr. UI Solutions Developers to provide you with the best technical and Pega Platform™ expertise.

[Download list of issues](#)

**Application Modernization Assistant** v1.0.3

Select the list of applications to analyze

AGConst
  Healthcare Appeals and Grievances Application
  Foundation for Healthcare Core Application
  RxNorm drug data store
  Healthcare Codes Management Application

[Run analysis](#)

---

**Modernization summary for**  
 AGConst, Healthcare Appeals and Grievances Application, Foundation for Healthcare Core Application, RxNorm drug data store, Healthcare Codes Management Application ↻

Overview [Issues by type](#) [Issues by rule](#)

Issue type

Message  
 A case type rule should use stages and steps - This is a requirement to run on Constellation UI

Severity **Critical** Complexity **Complex**

**Issues by rule**

Rule type	Rule key	Rule class	Ruleset	Ruleset version	Count	Status	Edit
Rule-Obj-Flow	<a href="#">DocTemplateApproval</a>	PegaHC-Doc-Work-Template	PegaHC-DocManagement	08-08-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">AddAttachment</a>	PegaHealth-Work-CodeSet	PegaHealthCodes	08-01-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">Manage code set</a>	PegaHealth-Work-CodeSet	PegaHealthCodes	08-01-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">DocTemplateCommon</a>	PegaHC-Doc-Work-Template	PegaHC-DocManagement	08-08-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">CollectCodeSetData</a>	PegaHealth-Work-CodeSet	PegaHealthCodes	08-01-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">ApprovalProcess</a>	PegaHealth-Work-CodeGroup	PegaHealthCodeGroups	08-01-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">CreateCodeGroup</a>	PegaHealth-Work-CodeGroup	PegaHealthCodeGroups	08-01-01	1		<a href="#">✎</a>
Rule-Obj-Flow	<a href="#">UpdateDocTemplate</a>	PegaHC-Doc-Work-Template	PegaHC-DocManagement	08-08-01	1		<a href="#">✎</a>

# Identifying an adoption strategy

For a given workflow domain, or application, there are typically three choices

## New applications

### 01

This strategy is about creating a new application quickly. It's focused on speed-of-delivery and ease-of-maintenance through leveraging the latest Pega Infinity has to offer.

## Prioritize innovation Uplift as needed

### 02

Introduce new Case types and uplift existing functionality with the modular approach.

This strategy is about adding new business value throughout the transition, and uplift future-facing features that will be reused.

## Uplift existing

### 03

Modernize existing functionality to address governing body rules.

Reasons to use this approach:

- Security, such as strict CSP
- Accessibility concerns
- Front-end performance
- Authentication for legacy Mashup and 3<sup>rd</sup> party cookies



Next steps?







## Scan the QR code for more content

More information is available on the Constellation Community page! Scan the QR code for:

- Constellation Adoption Strategies
- Training
- Documentation
- Events
- Videos
- Blogs
- Support

# “Constellation 8”

1. Productivity
2. Developer experience/best practices
3. Performance
4. Extensibility
5. Maintainability
6. Accessibility
7. Security
8. Localization

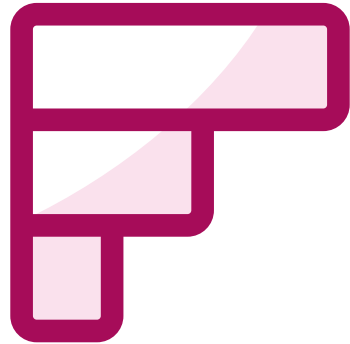


Which of these represents Constellation the best?\*



slido

Please download and install  
the Slido app on all  
computers you use



# Which of these represents Constellation the best?

① Start presenting to display the poll results on this slide.

Which of these represents Constellation the best?\*





- Opinionated
- Low maintenance
- Fast
- Flexible
- Out-Of-The-Box
- Looks cute
- Excellent value 😊

# CONSTELLATION

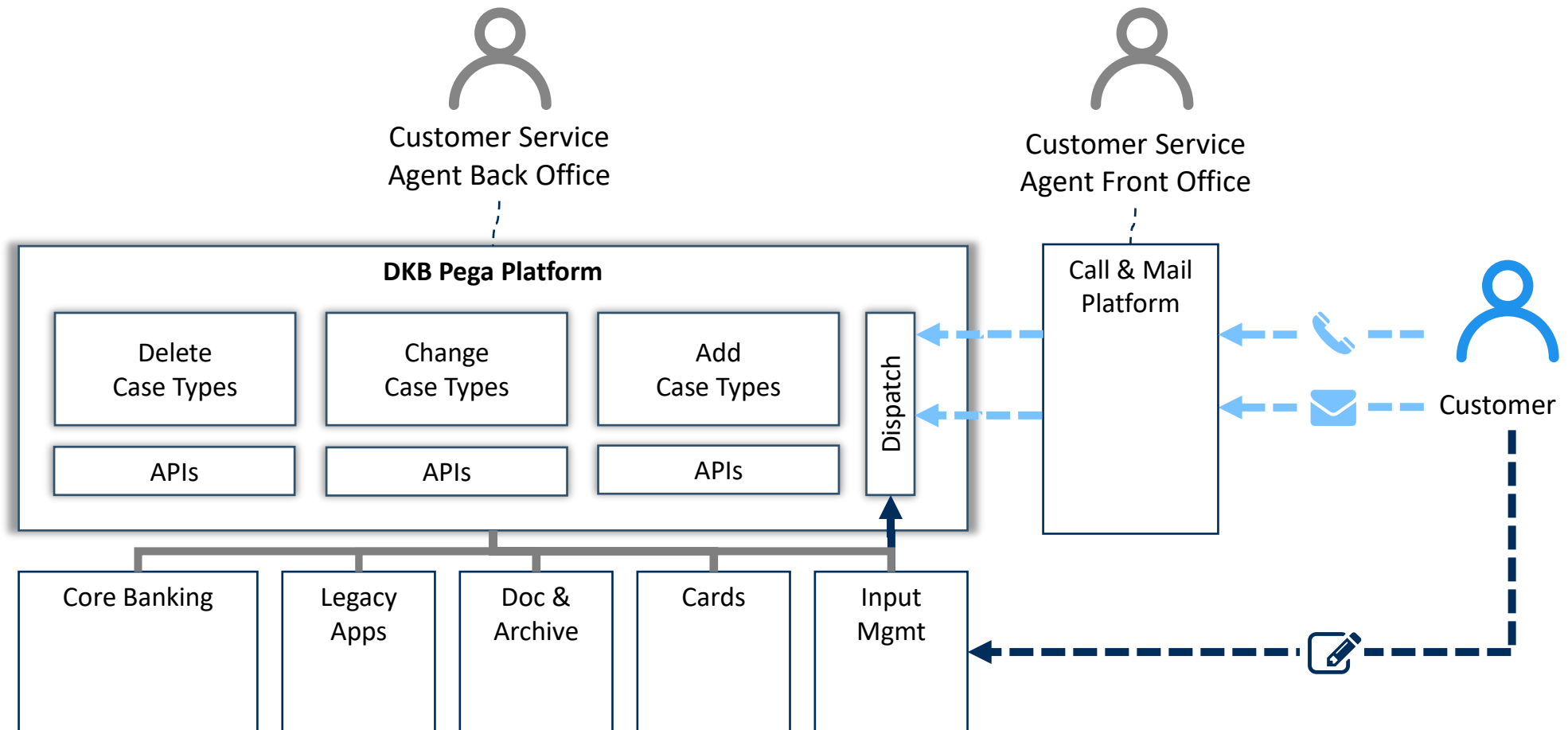
## Panel discussion & questions

Customer Experience Story and deep-dive - Constellation @ DKB

Jochen Reinartz, Marco Duizer, Jeroen Geerdink, Stephen Bixby

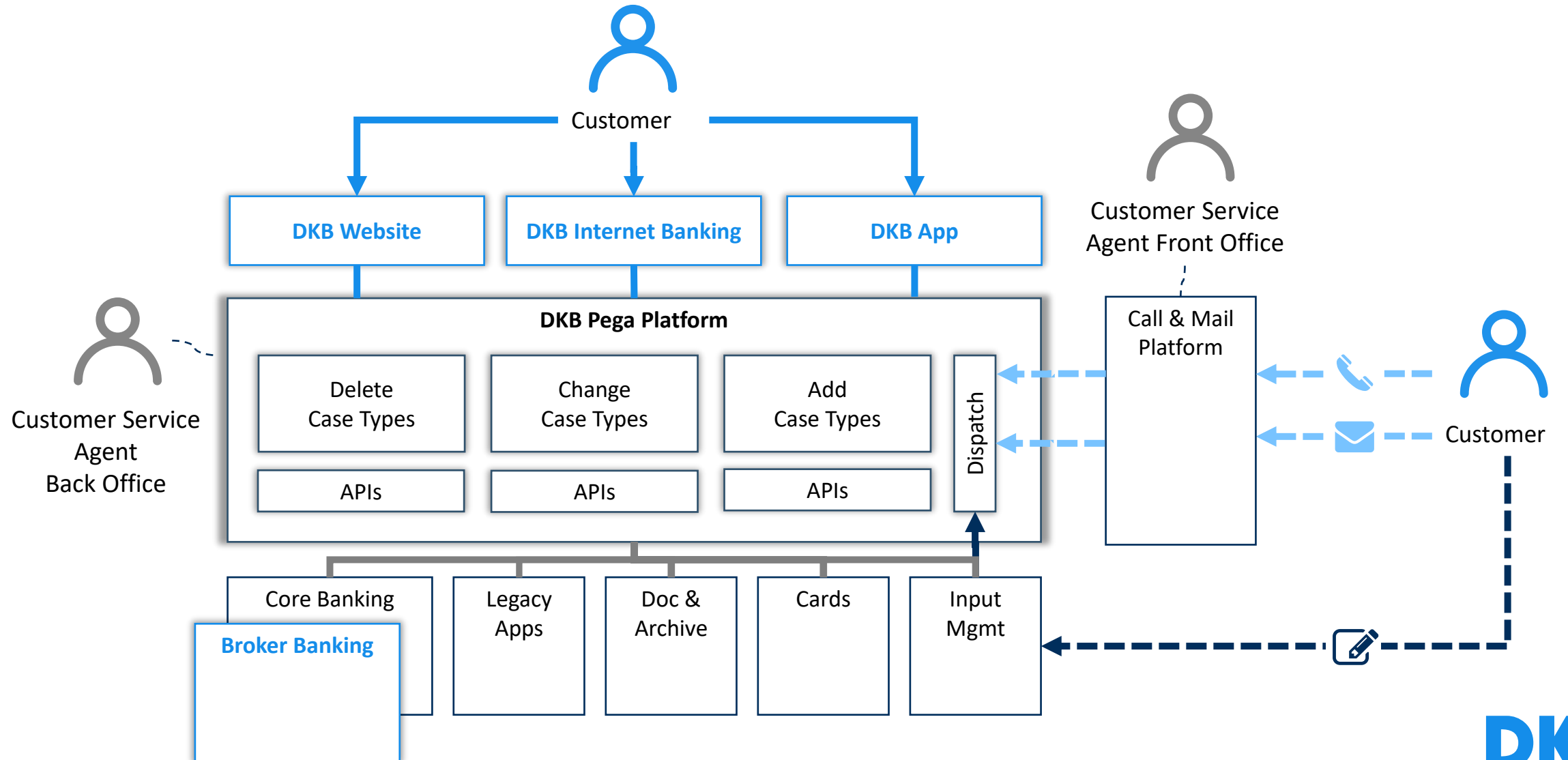


# The DKB PEGA Journey – A Center-Out Success Story





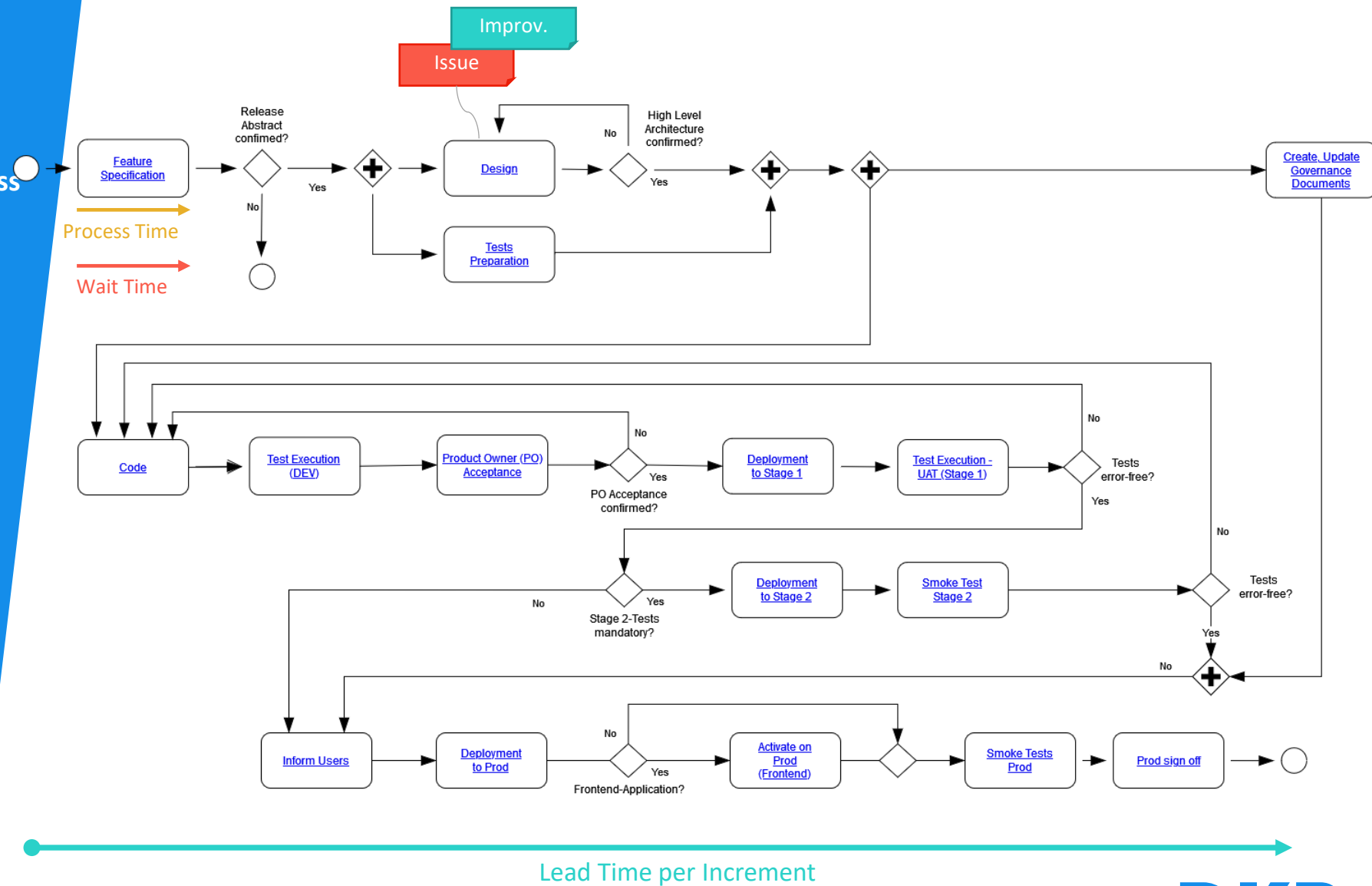
# The DKB PEGA Journey – A Center-Out Success Story



# Speed up Pega (1/2)

Lean Initiative, founded in 2023, optimizing efficiency and effectiveness of the Pega Continuous Delivery Pipeline, by using

- quantitative methods (Value Stream Analyse: Lead, Process und Wait Time) and
- qualitative methods (Gemba, expert judgement) to improve the flow of work.

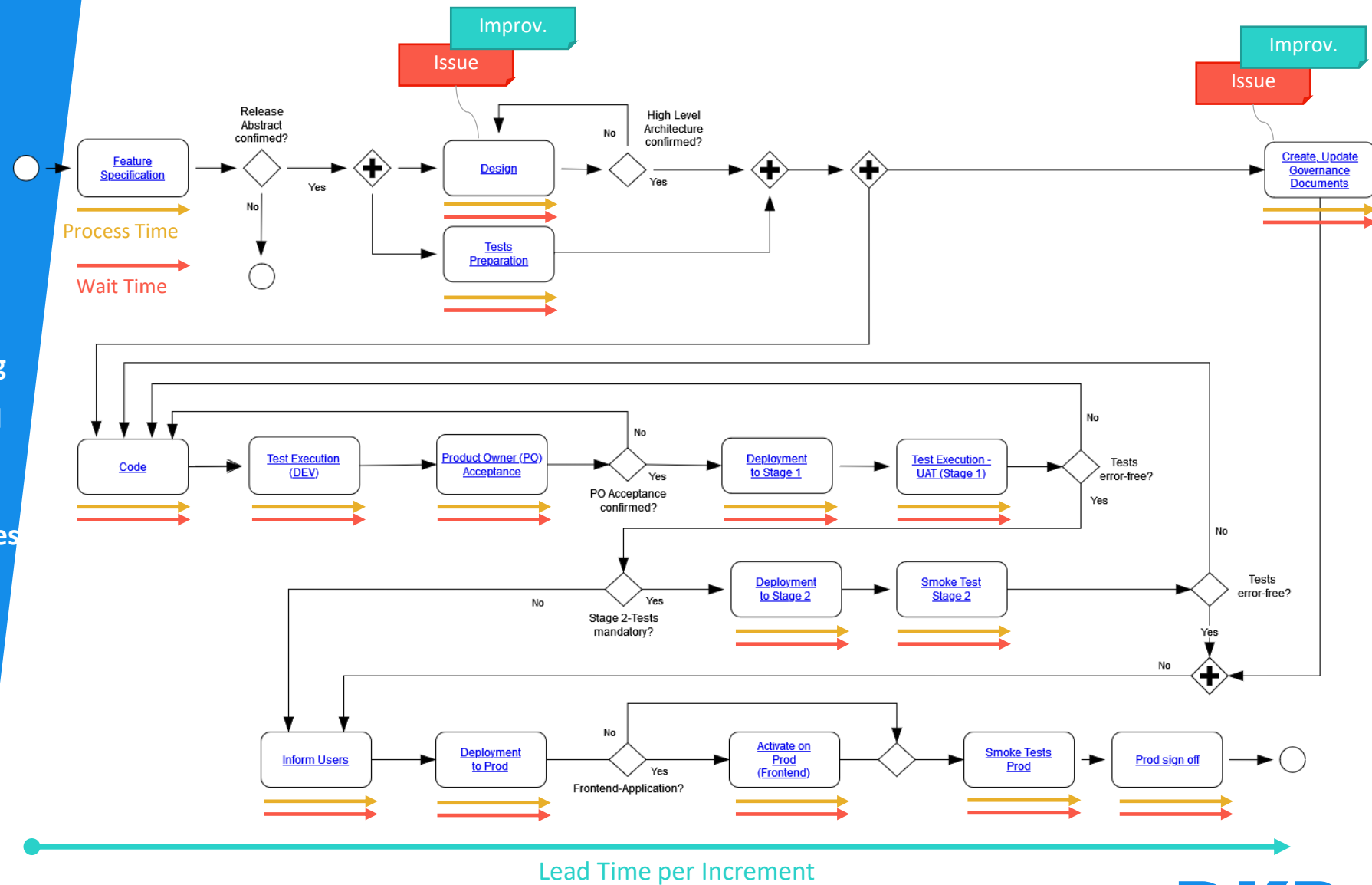


# Speed up Pega (2/2)

## 15 Improvement Delivered e.g.

- Eliminate Wait Time to integrate Constellation Frontends into Internet Banking
- Increase Testing Maturity: Test automation, Tools, way of working
- Increase Feature Specification and Design: Forcing Direct Capture Objective Workshops having the right people at the table, Templates
- Earlier and streamlined High Level architecture
- Slice Increments / Features
- Pega Express

Increase Lead time by ~ 15%



# Pega Express

Identified as improvement potential within the Speed Up Pega initiative



Proof of concept by Product Team Stammdatenänderung in Oct 2023, outcome:

Proof of Workshop concept and templates

All key Stakeholder aligned: Business, Business Architects, UI/UX Designer, PEGA Architects, Testers and Product Owner

Business Feedback based on running Software

Lessons learned and recommendation provided (e.g. slicing Features)

Statement Product Owner Sep 2024: “That how we starting each implementation.”

Other Team are following, and they are close by. The way of adopting differs (workshops, use of templates and tools), but this is essential to get teams on board.

We are promoting and adoping further!





# Your questions ?