



## **Pega Infinity Package**

### **Readme**

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**Version 1.0.1**

**03/02/2021**

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# 1. Introduction

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This document contains all essential information for the user to make full use of this A2019 **Pega Infinity Package**. It includes a description of the functions and capabilities and step-by-step procedures for setup & configuration of the **Pega Infinity Package**.

## 1.1 Overview

The package supports several APIs from the Pega Infinity platform and Pega applications based on this platform such as Customer Service and Sales Automation. It contains actions to start cases, download and upload case attachments and execute user case assignments.

## 1.2 Use cases

The key use cases include:

- Start a new case in Pega Infinity
- Upload and download attachments of an existing case
- Get and execute user assignments
- Get detailed case information

## 2. Requirements & Prerequisites

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### 2.1 System Requirements

- Enterprise A2019.19+
- Pega Infinity version 8.5+

### 2.2 Prerequisites

First, you need a Pega Infinity installation.

Get the user credentials of a user that has the permissions to start cases and work with attachments and assignments.

To start with Pega Infinity, follow these instructions

<https://community.pega.com/knowledgebase/products/platform>

Don't forget to set permissions & roles so that your user can access the right features

<https://community.pega.com/knowledgebase/articles/security/85/authorization>

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## 3. Getting Started






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### 3.1 Quick Start

#### 3.1.1 Setup

Import the A2019 Pega Infinity Package in the Control Room under Bots->Packages

The package contains the following command actions

-  Case Attach Document
-  Change Case Stage
-  Download Document
-  End Session
-  Execute Assignment
-  Get Assignment Actions
-  Get User Assignment Details
-  Get Case Actions
-  Get All Case Details
-  Get User Case Assignments
-  Get Case Attachments
-  Get Case Status
-  Get Case Types
-  Get User Direct Assignments
-  Start Case
-  Start Session
-  Update Case Details
-  Upload Document

Input formats:

For actions like “Start Case”, “Execute Assignment” or “Update Case Details”, content should be in JSON format , e.g.

```
{"OrderNumber":"DE3433","Request":"Exchange","Reason":"Damaged","Contact":{"FirstName":"Stefan","LastName":"Karsten","Email":"demo@aai.com"}}
```

Format of Page Instructions should be in JSON format as well, Please refer to

<https://community.pega.com/knowledgebase/articles/data-management-and-integration/85/page-related-operation-queuing-page-instructions-pega-apis>

Name	Description	Parameter	
<b>Start Session</b>	Starts a new session	Session Name	Unique Pega session
		Pega URL	URL of the Pega instance ,e.g. https://mypega:8080/prweb
		User Name	Pega User
		Password	Password of a Pega User
<b>End session</b>	Ends a session	Session Name	Unique Pega session
<b>Get Case Types</b>	Get a list of available case types	Session Name	Unique Pega session
		List of Case Type IDs	List of Case Type IDs
<b>Start Case</b>	Starts a new case	Session Name	Unique Pega session
		Case Type ID	Case Type ID of the new Case
		Process ID (optional)	Optional Process ID
		Parent Case (optional)	Optional ID of a Parent Case
		Page Instructions (optional)	Optional page instructions
		Result	ID of the new Case, e.g. <i>UPLUS-ORDERRETURN-WORK OR-14002</i>

<b>Get All Case Details</b>	Get All Case Details	Session Name	Unique Pega session
		Case ID	Case ID
		Content Part Only	If only the content part should be delivered
		Case Details JSON	Details in JSON format
<b>Get Case Status</b>	Status of the case	Session Name	Unique Pega session
		Case ID	Case ID
		Case Status	Case Status
<b>Get Case Actions</b>	List of available actions	Session Name	Unique Pega session
		Case ID	Case ID
		List of Actions	Actions that are available for the case
<b>Get Case Attachments</b>	Get case attachments	Session Name	Unique Pega session
		Case ID	Case ID
		Dictionary<ID,Type> of Case Attachements	Dictionary of attachments with an entry for each attachment that contains the unique ID and its type (File, eMail or URL)
<b>Case Attach Document</b>	Attach Document to a Case	Session Name	Unique Pega session
		Case ID	Case ID
		Name (optional)	Display name of the document
		Category (optional)	Category of the document
		Attachment Type	File or URL
		File ID (optional)	File id of an uploaded document
		URL (optional)	URL to attach
		Result	Empty if success

<b>Upload Document</b>	Upload a new file document	Session Name	Unique Pega session
		File Name	Full path of the file
		Result	File ID
<b>Case Attach Document</b>	Attach Document to a Case	Session Name	Unique Pega session
		Case ID	Case ID
		Name (optional)	Display name of the document
		Category (optional)	Category of the document
		Attachment Type	File or URL
		File ID (optional)	File id of an uploaded document
		URL (optional)	URL to attach
		Result	Empty if success
<b>Download Document</b>	Download Document	Session Name	Unique Pega session
		Attachment ID	Unique ID of the attachment
		Attachment Type	FILE or URL
		File Path (optional)	Path where to store the file
		File Name (optional)	In case a file name can be retrieved from the attachment, this one will be used
		Result	Either saved file name, email content or URL
<b>Get User Case Assignments</b>	Get User's workbasket assignments	Session Name	Unique Pega session
		Case ID	Case ID
		List of Assignment IDs	Assignment IDs for the user's workbasket
<b>Get Assignment Actions</b>	Get Assignment Actions	Session Name	Unique Pega session
		Assignment ID	Assignment ID
		List of Action IDs	List of available action IDs for this assignment



<b>Get User Direct Assignments</b>	Direct assignments	Session Name	Unique Pega session
		Case ID	Case ID
		List of Assignment IDs	Assignment IDs for the user where the user is directly assigned
<b>Change Case Stage</b>	Change Case Stage	Session Name	Unique Pega session
		Case ID	Case ID
		New Stage	New Stage for the case
		Audit Note	Audit Note for stage change
		Result	Result for the stage
<b>Execute Assignment</b>	Execute Assignment	Session Name	Unique Pega session
		Assignment ID	Assignment ID
		Action ID	Action ID
		Save Only	If assignment should be saved only or executed as well
		Content	Content for updating the case in JSON format
		Result	Result of the execution. If successful returns the next assignment details in JSON format
<b>Update Case Details</b>	Update Case Details	Session Name	Unique Pega session
		Case ID	Case ID
		Content	Content for updating the case in JSON format
		Result	Result of the update

## 4. Support & FAQs

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### 4.1 Support

Free bots are not officially supported. You can get access to Community Support through the following channels:

- You can get access to Community Support, connecting with other Automation Anywhere customers and developers on [APeople](#) – the [Bot Building Forum](#), the [Bot Store Support Forum](#), or the [Developers Everywhere Group](#).
- Automation Anywhere also provides a [Product Documentation portal](#) which can be accessed for more information about our products and guidance on [Enterprise A2019](#).

### 4.2 FAQs

*You find more information about the Pega API here*

[https://community.pega.com/knowledgebase/articles/data-management-and-integration/85/using-  
pega-api](https://community.pega.com/knowledgebase/articles/data-management-and-integration/85/using-pega-api)

For questions relating to Enterprise A2019: See the [Enterprise A2019 FAQs](#).

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## Appendix A: Record of Changes

*Instructions: Provide information on the version number, the date of the version, the author/owner of the version, and a brief description of the reason for creating the revised version.*

No.	Version Number	Date of Change	Author	Notes
<b>1</b>	<i>1.0.1</i>	<i>03/03/2021</i>	<i>Stefan Karsten</i>	<i>Initial version</i>

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## Appendix B: References

No.	Topic	Reference Link
1	Overview of Enterprise A2019	Click <a href="#">here</a>
2	Guidance: Building basic A2019 bots	Click <a href="#">here</a>
3	Guidance: Building A2019 action packages	Click <a href="#">here</a>
4	APeople Community Forum	Click <a href="#">here</a>
5	Automation Anywhere University	Click <a href="#">here</a>