Exploring PEGA Directed Web Access (DWA) for External Users

Aindrila Ghorai

Senior System Architect
Email: *aindrila. ghorai[at]gmail.com*

Abstract: *In today's interconnected digital landscape, the ability to seamlessly access and interact with enterprise applications is essential for external stakeholders. PEGA Directed Web Access (DWA) emerges as a transformative solution, empowering organizations to extend the functionality of their PEGA applications to external users securely. This research paper presents an in - depth analysis of PEGA DWA, exploring its functionalities, benefits, implementation strategies, and real - world applications. Through a synthesis of academic literature, case studies, and practical insights, this research aims to shed light on the significance of PEGA DWA in enabling external collaboration and driving business success.*

Keywords: PEGA, Directed Web Access, External Users, Enterprise Applications, Operational Efficiency

1. Introduction

In an era characterized by digital transformation and remote collaboration, enabling external stakeholders to access enterprise applications seamlessly has become imperative for organizations seeking to remain competitive. PEGA Directed Web Access (DWA) serves as a pivotal tool in this regard, offering a secure and efficient mechanism for extending the functionality of PEGA applications to external users. This paper provides a comprehensive examination of PEGA DWA, aiming to elucidate its significance, functionalities, benefits, and implementation considerations in facilitating enhanced accessibility and collaboration for external users.

a) Fundamentals of PEGA Directed Web Access (DWA)
PEGA Directed Web Access (DWA) is a feature within the PEGA platform that allows organizations to extend access to their PEGA applications to external users securely. With PEGA DWA, organizations can grant controlled access to external stakeholders such as partners, vendors, customers, or other third parties without requiring full system access or user licenses.

PEGA DWA enables organizations to create customized web interfaces tailored to the specific needs and preferences of external users. It provides secure authentication mechanisms, role - based access controls, and integration capabilities to ensure that external users can interact with relevant data and functionalities within the PEGA environment while maintaining data security and compliance [1].

b) Key Features and Functionality:
PEGA DWA offers a comprehensive suite of features designed to facilitate seamless interaction between external users and PEGA applications. Key functionalities include:

Secure Authentication: PEGA DWA employs robust authentication mechanisms, such as single sign - on (SSO) and multi - factor authentication (MFA), to ensure secure access for external users.

Role - Based Access Control: Administrators can define granular access controls and permissions based on user roles, ensuring that external users only have access to authorized data and functionalities.

Customizable User Interfaces: PEGA DWA enables organizations to create customized web interfaces tailored to the specific needs and preferences of external users, providing a user - friendly and intuitive experience.

Integration Capabilities: PEGA DWA seamlessly integrates with other PEGA platforms and third - party applications, enabling seamless data exchange and workflow automation across disparate systems.

c) Research Objective/Scope
- The research objective of this study is to comprehensively investigate the functionalities, benefits, implementation strategies, and real - world applications of PEGA Directed Web Access (DWA) in facilitating secure and efficient collaboration with external stakeholders.
- Specifically, the scope includes exploring the key features and capabilities of PEGA DWA, analyzing its benefits for organizations and external users, examining best practices for implementation, reviewing real - world use cases across various industries, addressing challenges and considerations, and providing recommendations for future directions in leveraging PEGA DWA to drive digital transformation and business success.

2. Real World Implementation

Business Requirement:
Upon receiving a request in Pega, an automated email is dispatched to the external user's email address, typically the customer's email. This email includes a unique link. Clicking on this link opens a browser session, enabling the user to complete an assignment without the need to log into the application. To maintain security, the link is valid for a single use only. [2]

Solution:
To send an external assignment, the application embeds a specially crafted URL within the content of an email. Upon clicking this URL, the recipient's web browser initiates a

session, automatically transmitting a one - time identifier and password to the PRPC server.
Upon authentication of these credentials, Pega dispatches an assignment to the user's browser. Upon completion and submission of the form by the user, the connection from the requester terminates. It's important to note that the external user is unable to repeat the assignment or reuse the URL or password for security purposes.

For security considerations, the URL associated with an external assignment must remain static and cannot be generated or modified by JavaScript or other runtime processes. This constraint precludes the use of AJAX, dynamic select, or Smart Prompt in the flow action, as these features require multiple server interactions. [3]

Steps to Implement:
a) Create an Operator for External User - Create an Operator ID or IDs that start with the reserved word "External". On the **Security** tab, set the **License Type** field to **"Invocation"** and enable "Use External Authentication" checkbox.
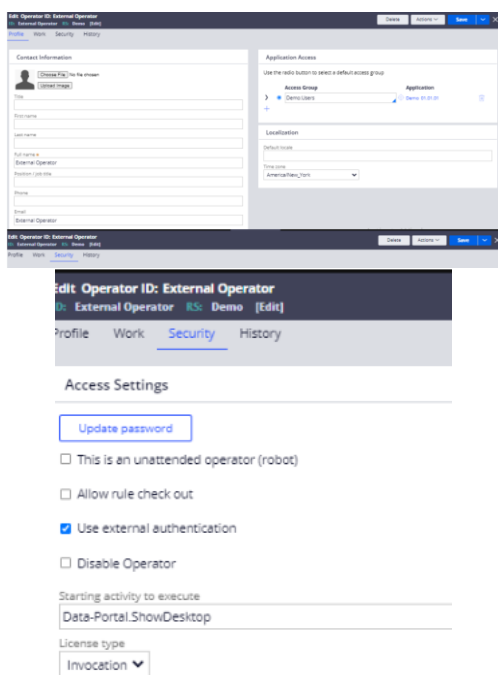
b) Configure the base URL – Select Designer Studio ->System - >Settings - >URLs and configure the Public Link URL field to configure the system url which would be used by the External user. Example: http: //mysystem/prweb/
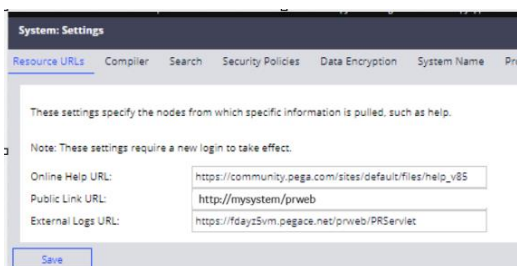

*c) Create a Correspondence Rule –* Create a correspondence rule of type email and in the Stream Source field, use an include directive (not a JSP tag) to copy in the standard correspondence fragment named **External Instructions. Email** at the point where the link is needed. For example:

```
Dear {.pyCustomerName}:
{.pyNote Normal}
{INCLUDE FRAGMENT="ExternalInstructions" }
Our thanks.
{pyCorrPage.pySignature NORMAL }
```

d) Call DWA Flow – To start the DWA flow automatically add the OOTB flow "Work. Engage External Quick" to the Case Type rule as an automatically launched process. Customize the OOTB flow to add application specific Correspondence and Operator details. In the Assignment details of the flow action, chose the routing option as "Custom" since it is routed to an external operator and add the corresponding Approver work party. [4]
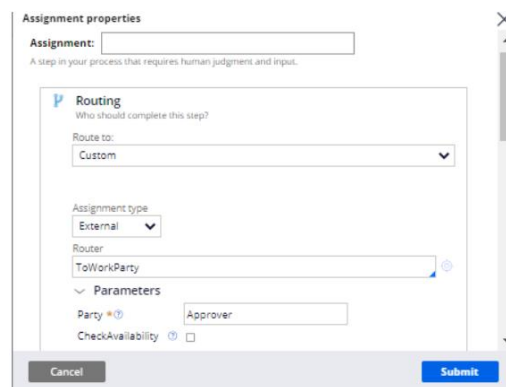
Update the operator model to add the custom external operator that was created in step 1:
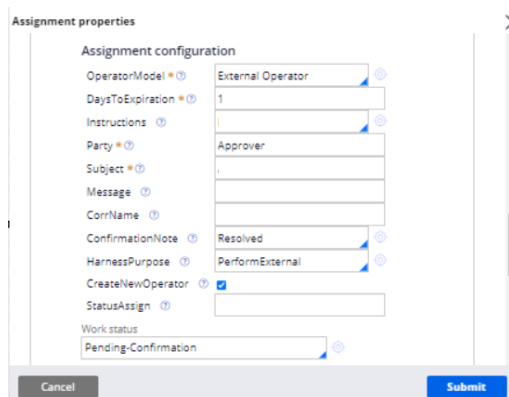
e) Sample External Assignment:
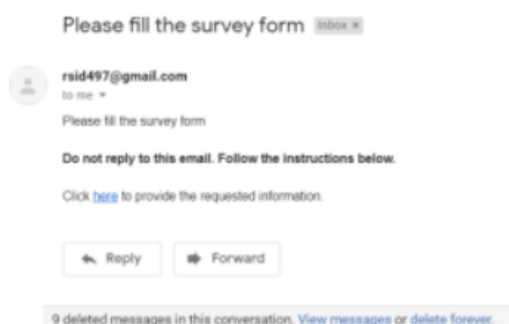
When clicking on the link provided in the email, it will bring up the assignment to fill in the details:

paper serve as a valuable resource for informed decision - making and effective implementation of PEGA DWA in diverse organizational contexts.

5. Future Directions and Recommendations

As organizations continue to prioritize digital transformation and remote collaboration, the role of PEGA DWA is poised to expand further. Future research and development efforts should focus on enhancing the scalability, flexibility, and security of PEGA DWA to meet the evolving needs of organizations and external users. Additionally, exploring integration with emerging technologies such as artificial intelligence and machine learning could unlock new possibilities for optimizing user experiences and driving innovation in enterprise application access.

References

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3. Benefits of PEGA Directed Web Access

The adoption of PEGA DWA offers numerous benefits for organizations and external users alike, including:

- **Enhanced Accessibility:** PEGA DWA enables external stakeholders, such as partners, vendors, and customers, to access relevant data and functionalities within PEGA applications from any location, at any time, fostering collaboration and information exchange.
- **Improved Efficiency:** By streamlining access to PEGA applications for external users, PEGA DWA reduces reliance on manual processes, email communications, and file sharing, leading to improved operational efficiency and productivity.
- **Enhanced Security:** PEGA DWA implements robust security measures, such as encryption, access controls, and audit trails, to protect sensitive data and mitigate security risks associated with external access.
- **Scalability and Flexibility**: PEGA DWA is highly scalable and adaptable, allowing organizations to accommodate changing user requirements, fluctuating workloads, and evolving business needs with ease.

4. Conclusion

In conclusion, this research paper has provided a comprehensive examination of PEGA Directed Web Access (DWA) and its implications for organizations seeking to facilitate secure and efficient collaboration with external stakeholders. Through an analysis of its functionalities, benefits, implementation strategies, real - world applications, and challenges, several key findings have emerged. PEGA DWA offers organizations a powerful tool for extending the functionality of their PEGA applications to external users, enabling enhanced accessibility, improved collaboration, increased efficiency, and cost savings. While the implementation of PEGA DWA presents challenges such as data privacy and regulatory compliance, adherence to best practices and considerations can mitigate these risks. Looking ahead, the future of PEGA DWA holds promise for driving digital transformation and fostering business success through continued innovation and adaptation to evolving organizational needs and technological advancements. As organizations continue to embrace external collaboration as a strategic imperative, the insights gleaned from this research