



# PegaWorld

JUNE 7-9 | LAS VEGAS

[PEGAWORLD.COM](https://pegaworld.com)



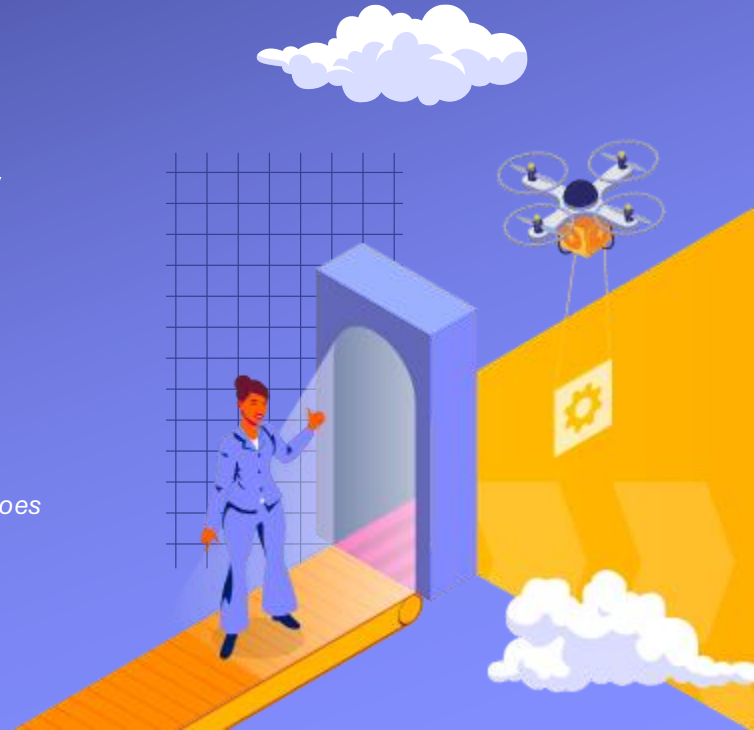
# PegaWorld

JUNE 7-9 | LAS VEGAS

# Easy as ABC: Update Pega Infinity

## Pega Cloud

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# Your speakers



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# Pega Infinity '26

IS NOW LIVE 



# When **You Stay Current**

Benefits of Updating to Latest Version

**Security  
Improvements**

1

**Performance  
Benefits**

2

**Bug Fixes**

3

**New Features**

4

# Bigger Picture

## Why “Latest Version” Matters?

*expect modernization to be continuous —*  
**embedded into how platforms  
are operated,**  
*not delivered as periodic projects.*

— Forrester



91%

**Leading Enterprises**  
*expect continuous modernization*

# Did you know?

**Every client** completing the Infinity '25 Update used the **Guided Experience**

— and **half of them** completed in **under 30 days**.

**100%**  
Used Guided Experience

**50%**  
Under 30 Days

**YOUR** updates are **Guided** and **AI-assisted**

**As Easy as A. B. C.**

**ASSESS**

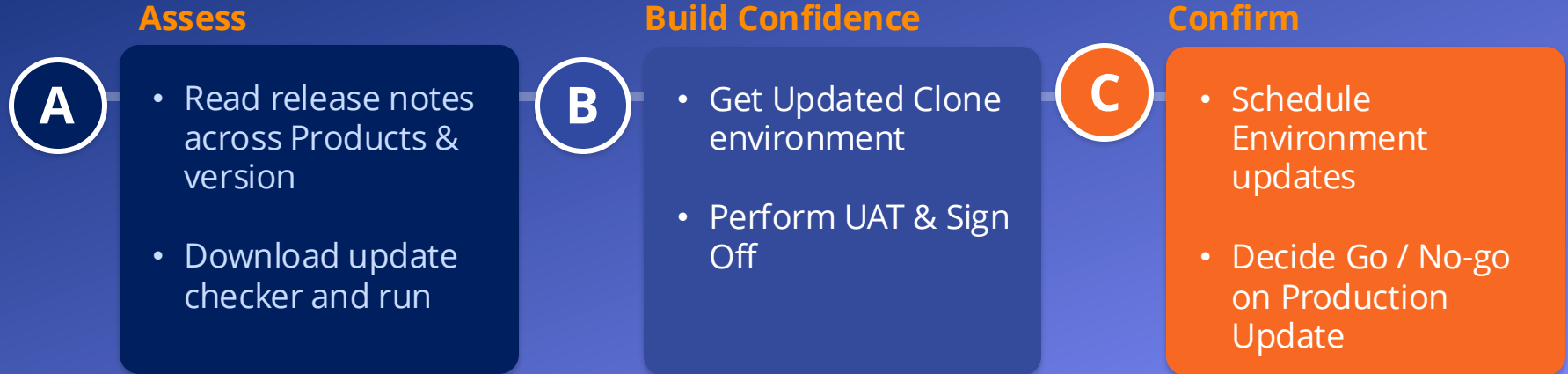
**BUILD CONFIDENCE**

**CONFIRM**

# Let's Begin the Update



# Current Process to Update



# Assess



Read release notes across  
Products & version

Download update checker and run

AFTER

My cloud setup Message center 0 Action center 0 Security Center 1

## Updates

NEW VERSION

# 25.1.2

### Time to Update

You're currently on Infinity 24.2.4 **STANDARD SUPPORT** [🔗](#) Ends on April 30, 2026

What's New?

Assess Update

View Details

## My environments (Pega Cloud 3) ⓘ

[View details](#)

# 1

Environments

[What's new in Pega Cloud](#) [🔗](#)

## Support tickets ⓘ

[View details](#)

# 37

Ongoing requests

[My Support Portal](#) [🔗](#)

## Account users ⓘ

[View details](#)

# 29

Users

[Understanding support user roles](#) [🔗](#)

## Assess Update - Infinity '25

Generally Available

View the update focused release notes summary from Pega Customer Service & Pega Platform. This is an AI generated information, please apply your best judgment in using this information.

[Download](#) ▾

### Features requiring update action



Review the following features that require your attention to stay current. The following list highlights the Deprecated, Withdrawn and features with update actions from Pega Customer Service & Pega Platform

#### ✦ Withdrawn and modified messaging properties

In '25 release, multiple messaging properties were withdrawn, renamed, or moved to a different Ruleset. If you have overridden any of these properties, perform the same changes in your custom properties, or create new custom properties that reflect the changes. [Read More](#) [🔗](#)

#### ✦ Legacy Native Routing

Starting with Pega Customer Service '25, the Legacy Native Routing methodology for chat interactions is deprecated. In future releases, Pega Customer Service will only support the Routing Service. [Read More](#) [🔗](#)

#### ✦ Limited support for the Report Browser in Pega Customer Service UI Kit

#### ✦ Withdrawn support for user-defined functions in staging and production environments

For staging and production environments (production level 4 and production level 5), support is withdrawn for Pega user-defined functions (UDFs) for reporting and Connect SQL capabilities. [Read More](#) [🔗](#)

View complete documentation: [Customer Service](#), [Platform'25](#)

### Known Issues



Review the known issues and the recommended actions before updating [Customer Service](#), [Platform'25](#)

✦ Regenerate

Proceed to Update

## Assess



Read release notes across Products & version  
**Download update checker and run**

BEFORE

### Download, Install & Run the Pega Update Tools

Download for 8.x

COMPONENT

#### Pega Upgrade Tools

Helps to identify the rule overrides that have potential upgrade problems before the actual upgrade is started.



COMPONENT

#### Pega Customer Service Upgrade Checker

Helps identify overrides to critical rules in your application, and recommends solutions to ensure that your upgrade is seamless.



COMPONENT

#### Pega Sales Automation Upgrade Checker

Helps to identify critical rules in your application, and recommends solutions to ensure that your upgrade is seamless.



COMPONENT

#### Pre-Update Check for Customer Decision Hub

Run a series of checks to assess if your system is ready for an update to the latest version of Customer Decision Hub.



# Assess



Read release notes across Products & version  
**Download update checker and run**

**AFTER**

## Application Update Assessment

Coming soon

Prepare for your next Pega Platform update  
Use the Update Readiness tool to ensure a smooth transition to the next update. [Go to Update Readiness tool](#)

Search all options...  
Application  
Case Management  
Decisioning  
Data Model  
Mobile  
Reporting  
Integration  
Org & Security  
System  
User Interface

Structure  
Inventory  
Quality  
Development  
Distribution  
Tools  
Components  
**Update readiness**

Page can also be navigat

### Cantaloupes readiness for Infinity 25.1 update

Included Applications and Versions  
Pega Platform 25.1.5   Pega Horizontal App 25.1.1   Pega Vertical App 25.1

Required items to complete  
Total items: 135

Recommended items to complete  
Total items: 135

Items to complete by ease  
Total items: 2155

Refresh list

- Rule conflicts  
Last updated: Oct 15, 2025   APPLICATION
- Infrastructure changes  
Last updated: Oct 15, 2025   ENVIRONMENT
- Critical Hotfixes  
Last updated: Oct 15, 2025   ENVIRONMENT

How using this tool prepares you  
This tool identifies rules that conflict across applications and RuleSets, which can block a successful update. A conflict occurs when multiple rules share the same key but differ by RuleSet or version, causing one rule to override another during rule resolution. Overrides can be intentional or accidental, but for an update to proceed, certain overrides must be undone. The list below shows rules flagged with severity and conflict type that require attention—review these and resolve overrides to ensure readiness.

All readiness items  
[Fix automatically](#)   Fix manually   Informational

Application name: All   Readiness type: All

Items 3 results

# Assess



Read release notes across Products & version  
**Download update checker and run**

**AFTER**

## Your Application assessment available on My Pega Cloud

Coming soon

The screenshot shows the My Pega Cloud interface. At the top, there are navigation tabs: My cloud setup, Message center, Action center, and Security Center. The main content area is divided into several sections:

- Updates:** Shows a new version 25.1.2 and a 'Time to Update' section. It includes buttons for 'What's New?', 'Assess Update', and 'View Details'.
- My environments (Pega Cloud 3):** Shows 1 environment and a link for 'What's new in Pega Cloud'.
- Support tickets:** Shows 37 ongoing requests and a link to 'My Support Portal'.
- Account users:** Shows 29 users and a link for 'Understanding su'.

Overlaid on the right is an 'APPLICATION READINESS REPORT' window. It displays the following summary:

- Required Actions: 25
- Applications assessed: 2
- Recommendations: 4

The report was last run on 05 May 26, 12:30pm. It lists three applications with their respective action counts:

- claims-01-01: 15 actions
- Sales Force Automation: 10 actions
- Marketing Analytics: 3 actions

Below this is a table of actions:

Level	Action	Application name	Item	
Required	Add to test plan	Environment	RULE-OBJ-ACTIVITY @Baseclass TESTING LONG RULE NAME OVER HERE	<a href="#">Learn more</a>
Required	Update DSS value	self-serviceAPP:01-01-01	DATA-ADMIN-SYSTEM-SETTINGS pega/security/enforceTokenRotation	<a href="#">Learn more</a>
Required	Refactor rule reference	self-serviceAPPInt:01-01-01	RULE-OBJ-WHEN @baseclass ValidateClientContext	<a href="#">Learn more</a>
Required	Enable regression suite	Environment	TEST-SUITE UpdateReadiness_Smoke must run before cutover	<a href="#">Learn more</a>
Recommended	Review deprecated API	self-serviceAPPInt:01-01-01	Connect-REST pxExternalCustomerProfile endpoint version v1	<a href="#">Learn more</a>

## Assess

A

- ✓ Read release notes across Products & version
- ✓ Download update checker and run

## Build Confidence

B

Get Updated Clone Environment  
Perform UAT & Sign Off

NO CHANGE

The screenshot shows the Pega Updates console with a modal dialog titled "Review your clone setup". The dialog contains a message about a pre-update checker and a table of configuration details. At the bottom, there are buttons for "Start", "Cancel", "Previous", and "Submit".

My cloud setup | Message center 0 | Action center 0 | Security Center 1

Updates

NEW VERSION

25.1.

### Review your clone setup

Pega has installed a pre-update checker in your cloned environment. Use this tool to identify customized rules in your application and evaluate their impact on the update. For more details, refer to [Pega Upgrade Tools](#).

Infi	Target Pega version	Source environment
Use	25.1.2	tstac1-defedrmc-dt1
Infin	Environment type	
Peg	DevTest	
Cus		
Peg	<input type="checkbox"/>	I confirm that I have reviewed the update assessments and the Pega Infinity Update process, and I am ready to start the update.
Peg		

Start | Cancel | Previous | Submit

## Assess

## Build Confidence



- ✓ Read release notes across Products & version
- ✓ Download update checker and run



Get Updated Clone Environment  
**Perform UAT & Sign Off**

**BEFORE**

**UAT Approval** Initiating software updates in Pega Cloud 3

The clone environment has passed UAT\*

Approve  Reject

UAT feedback\*

The Validations were successful

I confirm that I have validated the update through UAT.

## Assess

## Build Confidence

A

- ✓ Read release notes across Products & version
- ✓ Download update checker and run

B

Get Updated Clone Environment  
Perform UAT & Sign Off

AFTER

## Application Update Assessment on your Updated UAT Environment

Coming soon

**PRIORITY REPORT** Last updated 14 mins ago

### Application Readiness Report

3 applications are compatible 1 application is not ready

**Application Compatibility**  
92% Rule Hygiene Met

**Pending update actions**

- ✓ Payment Portal Ready
- ✓ CRM System Ready
- ✓ Client relationship Ready
- Support Desk 1 required

**UAT Summary**

3 READY | 1 NOT READY

[View Readiness Report](#) [Export PDF](#)

### UAT Overview

**Case Type Validation Trend**  
Completion progress for May

**UAT ENVIRONMENT**  
NEXUS-STG-CLONE

**ENVIRONMENT TYPE**  
Staging

**PEGA VERSION**  
Infinity 26.1.0

✓ 3 of 4 applications verified

Action needed: UAT closes in 2 days, and 1 of 4 applications is still not tested.

[Sign-off](#)

### APPLICATION READINESS REPORT

Required Actions: **25** | Applications assessed: **2** | Recommendations: **4**

Last run on 05 May 26, 12:30pm. Open the complete report on: [NEXUS-Prod-01](#) | [NEXUS-Prod-02](#) | [NEXUS-QA-01](#)

**claims-01-01**  
15 actions

**Sales Force Automation**  
10 actions

**Marketing Analytics**  
3 actions

Level	Action	Application name	Item	
Required	Add to test plan	Environment	RULE-OBJ-ACTIVITY @Baseclass TESTING LONG RULE NAME OVER HERE	<a href="#">Learn more</a>
Required	Update DSS value	self-serviceAPP:01-01-01	DATA-ADMIN-SYSTEM-SETTINGS pega/security/enforceTokenRotation	<a href="#">Learn more</a>
Required	Refactor rule reference	self-serviceAPPInt:01-01-01	RULE-OBJ-WHEN @baseclass ValidateClientContext	<a href="#">Learn more</a>
Required	Enable regression suite	Environment	TEST-SUITE UpdateReadiness_Smoke must run before cutover	<a href="#">Learn more</a>
Recommended	Review deprecated API	self-serviceAPPInt:01-01-01	Connect-REST pxExternalCustomerProfile endpoint version v1	<a href="#">Learn more</a>

## Assess



- ✓ Read release notes across Products & version
- ✓ Download update checker and run



## Build Confidence

- ✓ Get Updated Clone Environment
- ✓ Perform UAT & Sign Off



## Confirm

### Schedule Environment

Decide Go / no go

NO CHANGE

## Schedule the Update for your Production

### Pega Infinity updates

You can now begin scheduling your environment updates. We recommend scheduling your environment updates (Production, Non-production) on different days.

#### Schedule environment update

Tomcat 10-related components detected. Go/No-Go validation is mandatory for the Infinity '25 update to ensure compatibility.

Recommended update order: DevOps, production, non-production.

Environment name  
pegack-crmi-pt

Schedule to\*  
5/16/26 9:10 PM

Go-NoGo ⓘ



Primary contact for Go-NoGo\* ⓘ  
Meenakshi Nayak

Cancel

Next >>

#### Review the schedule details

Environment name pegack-crmi-pt	Target Pega Platform update version 25.1.2	Scheduled time 5/16/26 9:10 PM
Go-NoGo Yes	Primary contact Meenakshi Nayak	

I confirm that I have reviewed the update assessments and the Pega Infinity Update process, and I am ready to start the update.

Cancel

Previous

Submit

## Assess



- ✓ Read release notes across Products & version
- ✓ Download update checker and run

## Build Confidence



- ✓ Get Updated Clone Environment
- ✓ Perform UAT & Sign Off

## Confirm



### Schedule Environment

Decide Go / no go

NO CHANGE

## Schedule the Update for your Lower Environments

**Pega Infinity updates**

You can now begin scheduling your environment updates. We recommend scheduling your environment updates for different types of environments (DevOps, Production, Non-production) on different days.

Environment name
adsdemoorchestrator

### Schedule environment update

Recommended update order: DevOps, production, non-production.

Environment name: adsdemoorchestrator

Schedule to\*: 5/16/26 9:17 PM

Cancel Next >>

## Assess



- ✓ Read release notes across Products & version
- ✓ Download update checker and run

## Build Confidence



- ✓ Get Updated Clone Environment
- ✓ Perform UAT & Sign Off

## Confirm



Schedule Environment  
Decide Go / no go

NO CHANGE

### Perform Go. No-Go

Task name	Go/NoGo decision
▶ Initialization	<p>Initiating software updates in Pega Cloud 3 <a href="#">↗</a></p> <p>Go: Selecting it will resume the update. NoGo: Selecting it will abandon the update.</p> <p>Go-NoGo Approval</p> <p>Go <input type="button" value="v"/></p> <p>Reason*</p> <p>Good to proceed the Production Update.</p> <p><input type="button" value="Cancel"/> <input type="button" value="Submit"/></p>
▶ Clone	
▼ Updates	
<b>Environment name</b>	
▶ pegack-crmi-pt	

# How to make Updates Faster?



## Automated Testing

Leverage automated test suites to validate updates quickly and reduce manual regression effort across your environment.



## Application Dev Practices

Follow best practices for customization and configuration to minimize update complexity and accelerate delivery.

# AI Generated Pega Application Tests for Automation

Build a strong test automation foundation using AI Generated Tests and run on Pega Cloud

1

## GenAI Test Generation

Agentic AI automatically creates and maintains UI and API tests for your applications

2

## Native Cloud Execution

Tests run natively on Pega Cloud infrastructure with no external tooling required

3

## Pipeline Integration

Fully integrated into the update and release lifecycle as automated quality gates

The screenshot displays the Pega App Studio interface. The top navigation bar shows 'APP STUDIO' and 'Application : Engineering OnCall'. The main content area is titled 'Application Tests' and contains a table of test cases. A modal window titled 'Execution Result : TC-3' is open, showing a list of test steps and their results. On the right, a '2. Quality Assurance' pipeline is visible, listing various deployment and testing actions.

ID	Name	Status	Created time
TC-3	Create On-Call Request for a Group and Capture SME Feedback	AUTOMATED	2/4/26 6:52 AM
TC-2	Create SME Enrollment for a Group	AUTOMATED	2/4/26 6:52 AM
TC-1	Create and Onboard a Group with Team Details	AUTOMATED	2/4/26 6:52 AM

Step	Result
GIVEN User logs in to system / Set User context	PASS
WHEN User Creates new Group Case	FAIL
AND Update case details	SKIP
THEN Verify the Case Stage	SKIP
THEN Verify the Case Status	SKIP
GIVEN I am logged in as Group Owner	SKIP
WHEN User performs Capture team details Assignment	SKIP
AND User performs Edit regional on call hours Assignment	SKIP
WHEN User performs SME and escalation details Assignment	SKIP
THEN Verify the Case Stage	SKIP
WHEN User Creates new SME Feedback Case	SKIP

- Deploy application
- Run Rule Security An...
- Enable test coverage
- Check guardrail comp...
- Verify security chec...
- Run Pega unit tests
- Run App tests (API)
- Run App tests (UI)
- Validate test covera...

# Application Design Best Practice



## Extension-First Design

Strict extension-based approach  
— no OOTB edits

Constellation-aligned with minimal  
customization



## Quality & Guardrails

> 90 Guardrail score with minimal  
warnings

Clear separation of concerns (UI /  
logic / data / integration)



## API & Configuration

Versioned APIs for stable  
integrations

Externalized configs for  
environment portability

# Additional Programs | Supporting Updates

Programs available for seamless updates and after on Pega Cloud



## Pega Update Success Program

Pilot (Opt-in)

Pre-GA Update validation by Pega and post-GA update assistance.



## Early Access

Pilot (Opt-in)

Gain access to Pre-GA Features on Pega Cloud through and Early access environment.



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