# Mastering Progress Rollbase

## Inside and Out

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# About Me

- Progress
- Senior Solutions Engineer
  - Application Development and Deployment

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# About Me

- BSc (Syd)
  - CompSci, Pure Maths
  - Social Anthropology, Linguistics
- Most of a MComp (ANU)
  - Distributed Computing
  - Human Computer Interaction
  - Graphics

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# Agenda

- External Authentication
- Different Users, Different Jobs
- Organisational Structure Matters
- Storage
- Rapid Application Development Features

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# About Progress Rollbase®

# PROGRESS® Rollbase®

- Browser-based Web and Mobile App development
- **80%** Click, 20% Code
- Reduce development time and resource requirements
- Simplify application delivery and deployment
- Accelerate time-to-market

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PROGRESS® Rollbase®

- Runs anywhere, no vendor lock-in
- Integrates out-of-the-box
- A growing library of pre-built sample applications
- Salesforce.com and Force.com Migration
- Custom branding and App Store for ISVs and Resellers

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# Core Rollbase Features

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# Fast Development

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# Open Deployment

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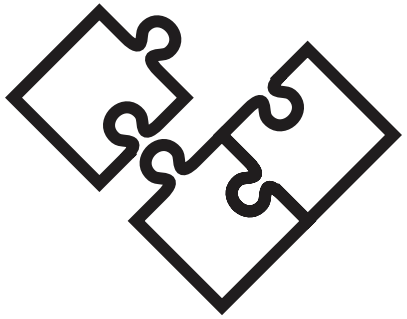

# Robust Integration

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# Easy Application Management

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# Mobile

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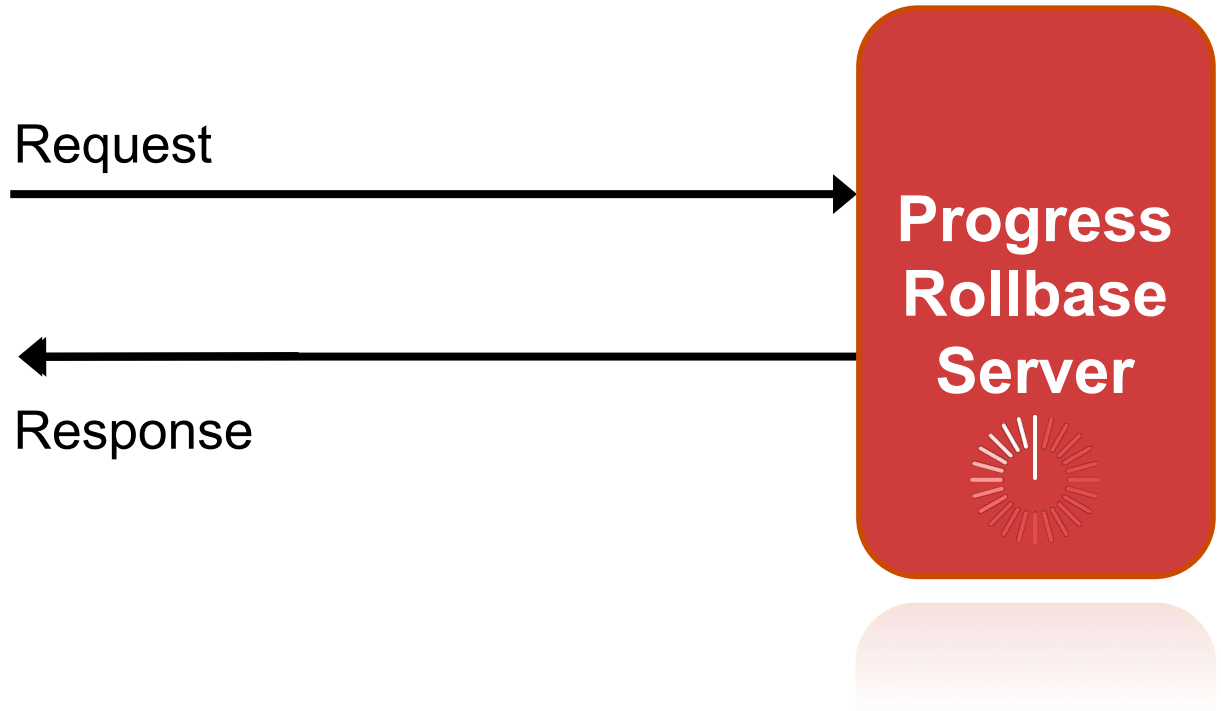
# Part One
# External Authentication, Roles and Permissions

# External Authentication

## Rollbase supports

- Internal
  - Password
- External
  - LDAP
  - HTTP POST
  - HTTP GET
  - OpenEdge SPA

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# External Authentication

## Rollbase supports

- Internal
  - Password
- External
  - LDAP
  - HTTP POST
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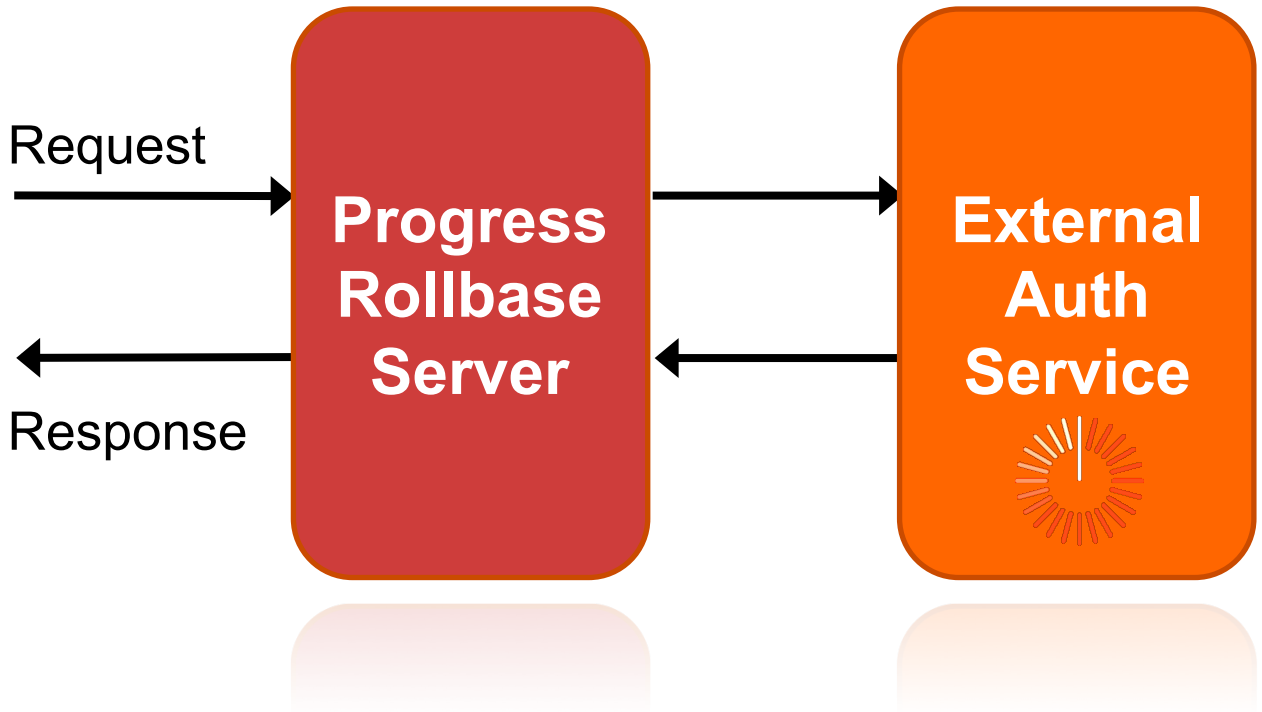
  - OpenEdge SPA

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With External Authentication, Rollbase no longer manages users' passwords

# Installs for External Authentication Using Progress OpenEdge

## OpenEdge Library Folder

- certj.jar
- cryptoj.jar
- o4glrt.jar
- psccerts.jar
- RBSPAclient.1.0.0.jar
- Sslj.jar

## Rollbase Library Folder

**Progress\Rollbase\Pas_Instance\common\ lib**

- certj.jar
- cryptoj.jar
- o4glrt.jar
- psccerts.jar
- RBSPAclient.1.0.0.jar
- Sslj.jar

Should be already installed as part of a private cloud deployment

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Restart Rollbase.

# Different Users, Different Jobs

| | |
|---|---|
| Administrator | Full Access |
| Portal Visitor | Assigned to visitors of external-facing Portals |
| Query API | Used to check permissions in Query API calls |
| Record Creator | Pseudo-role granted to another user role |

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# Different Users, Different Jobs

| | |
|---|---|
| Administrator | Full Access |
| Portal Visitor | Assigned to visitors of external-facing Portals |
| Query API | Used to check permissions in Query API calls |
| Record Creator | Pseudo-role granted to another user role |
| Traveller | Can log and manage travel requests |
| Approver | Looks after travel requests lodged by Travellers |

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# The “Record Creator” Role

- Pseudo Role
  - Applied on the top of a user
  - Provides specific permissions for records that user creates
  - Useful for relaxing strict permissions on such objects

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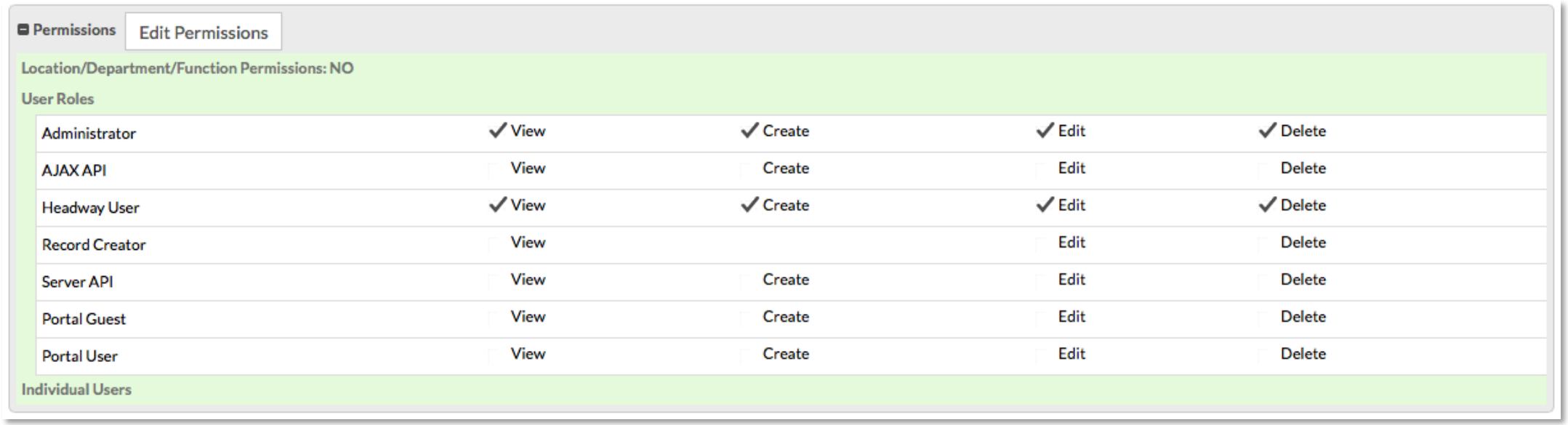
Visitors to a "Travel Request" Portal can create Travel Request records, as well as browse and manage a list of requests

Visitors to a "Travel Request" Portal can create Travel Request records, as well as browse and manage a list of their own requests

# Different Permission Types

- Component Level Permissions – Objects and Pages

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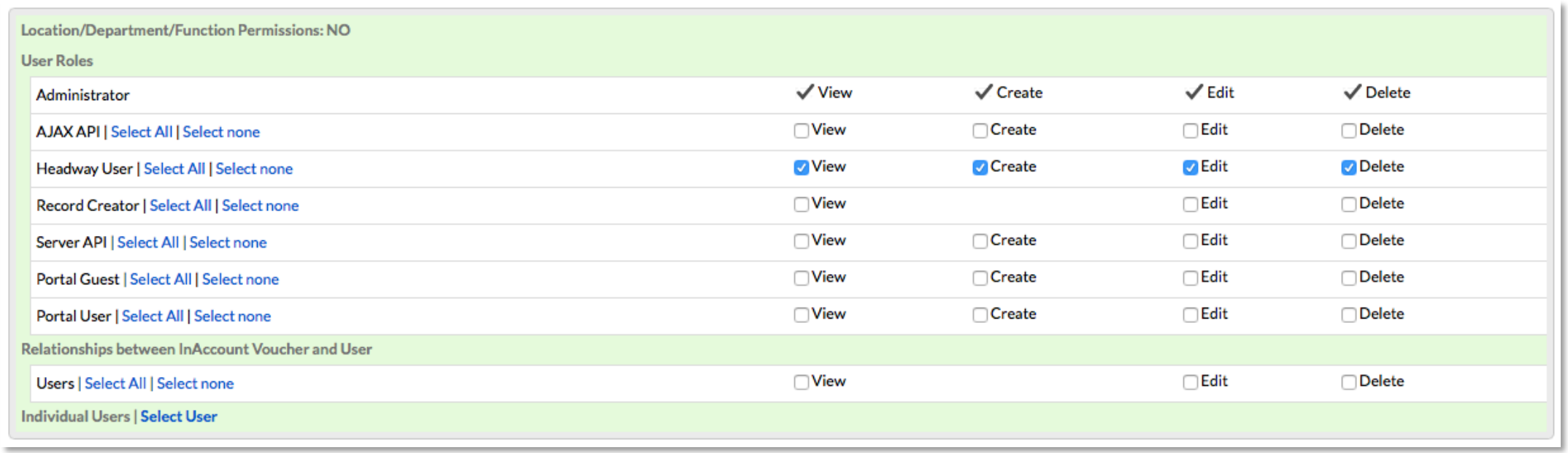
# Different Permission Types

- Permissions Through Relationships



Location/Department/Function Permissions: NO

User Roles

| | ✓ View | ✓ Create | ✓ Edit | ✓ Delete |
|---|---|---|---|---|
| Administrator | | | | |
| AJAX API \| Select All \| Select none | ☐ View | ☐ Create | ☐ Edit | ☐ Delete |
| Headway User \| Select All \| Select none | ☑ View | ☑ Create | ☑ Edit | ☑ Delete |
| Record Creator \| Select All \| Select none | ☐ View | | ☐ Edit | ☐ Delete |
| Server API \| Select All \| Select none | ☐ View | ☐ Create | ☐ Edit | ☐ Delete |
| Portal Guest \| Select All \| Select none | ☐ View | ☐ Create | ☐ Edit | ☐ Delete |
| Portal User \| Select All \| Select none | ☐ View | ☐ Create | ☐ Edit | ☐ Delete |

Relationships between InAccount Voucher and User

| | | | | |
|---|---|---|---|---|
| Users \| Select All \| Select none | ☐ View | | ☐ Edit | ☐ Delete |

Individual Users | **Select User**

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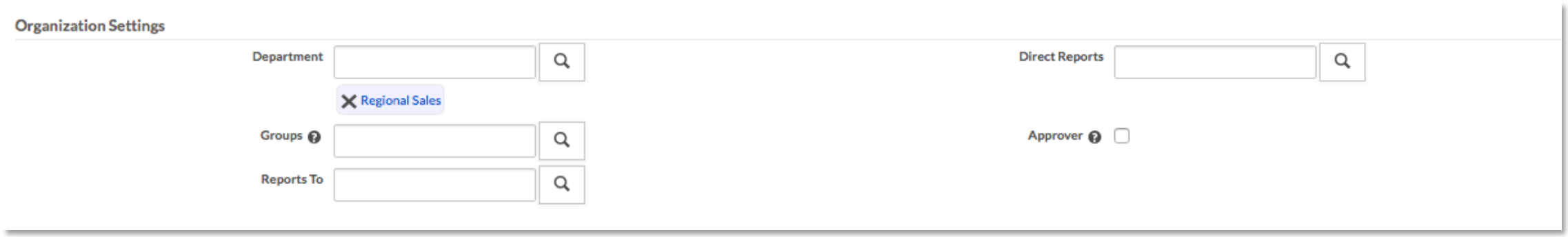
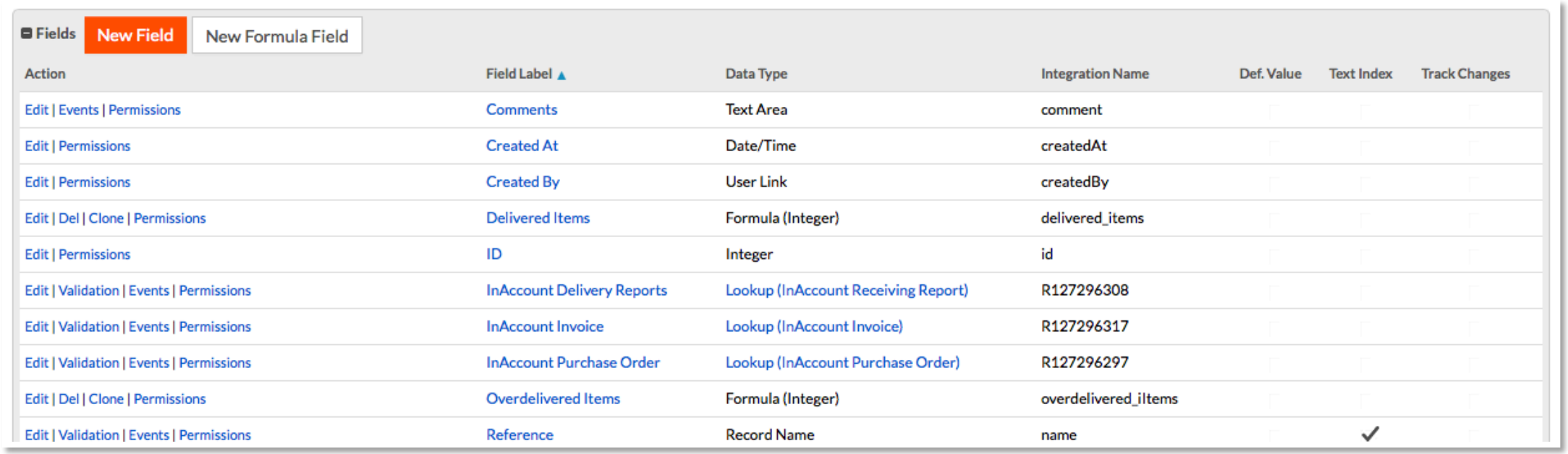
# Different Permission Types

- User Hierarchy



# Different Permission Types

- Field Level Permissions



Fields | New Field | New Formula Field

| Action | Field Label ▲ | Data Type | Integration Name | Def. Value | Text Index | Track Changes |
|---|---|---|---|---|---|---|
| Edit \| Events \| Permissions | Comments | Text Area | comment | | | |
| Edit \| Permissions | Created At | Date/Time | createdAt | | | |
| Edit \| Permissions | Created By | User Link | createdBy | | | |
| Edit \| Del \| Clone \| Permissions | Delivered Items | Formula (Integer) | delivered_items | | | |
| Edit \| Permissions | ID | Integer | id | | | |
| Edit \| Validation \| Events \| Permissions | InAccount Delivery Reports | Lookup (InAccount Receiving Report) | R127296308 | | | |
| Edit \| Validation \| Events \| Permissions | InAccount Invoice | Lookup (InAccount Invoice) | R127296317 | | | |
| Edit \| Validation \| Events \| Permissions | InAccount Purchase Order | Lookup (InAccount Purchase Order) | R127296297 | | | |
| Edit \| Del \| Clone \| Permissions | Overdelivered Items | Formula (Integer) | overdelivered_iItems | | | |
| Edit \| Validation \| Events \| Permissions | Reference | Record Name | name | | ✓ | |

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# LDF (Location, Department and Function) Permissions

- Allows modelling of permissions to match organizational structure
- Can handle complex organisational structures
  - Locations
  - Departments
  - Functions
- Uses the Organisation Management Application
- Uses Groups for access management

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Adding LDF permissions to large number of objects may affect application's performance.

# How to Implement LDF Functionality

- Install the Organization Management Application
- Create records in the Location, Department and Function trees, as needed
- Enable Organization attributes on desired Objects
- Assign LDF attributes to your records
- Define Groups for your users and assign LDF attributes to them

1

2

3

4

5

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# LDF Demo

# Part Two
# Third Party Storage and Rapid Application Development Features

# Third Party Cloud Services for Storage

- ISV or Private Cloud Users
- Configurable on a tenant by tenant basis
- Asynchronous movement
- Email reporting

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# Rapid Application Development Features

- Mobile app development
- Backup
- Batch jobs
- REST/SOAP/AJAX APIs
- Triggers
- Workflows
- Reports
- Charts, gauges
- Templates
- Cloud data access through DataDirect Cloud

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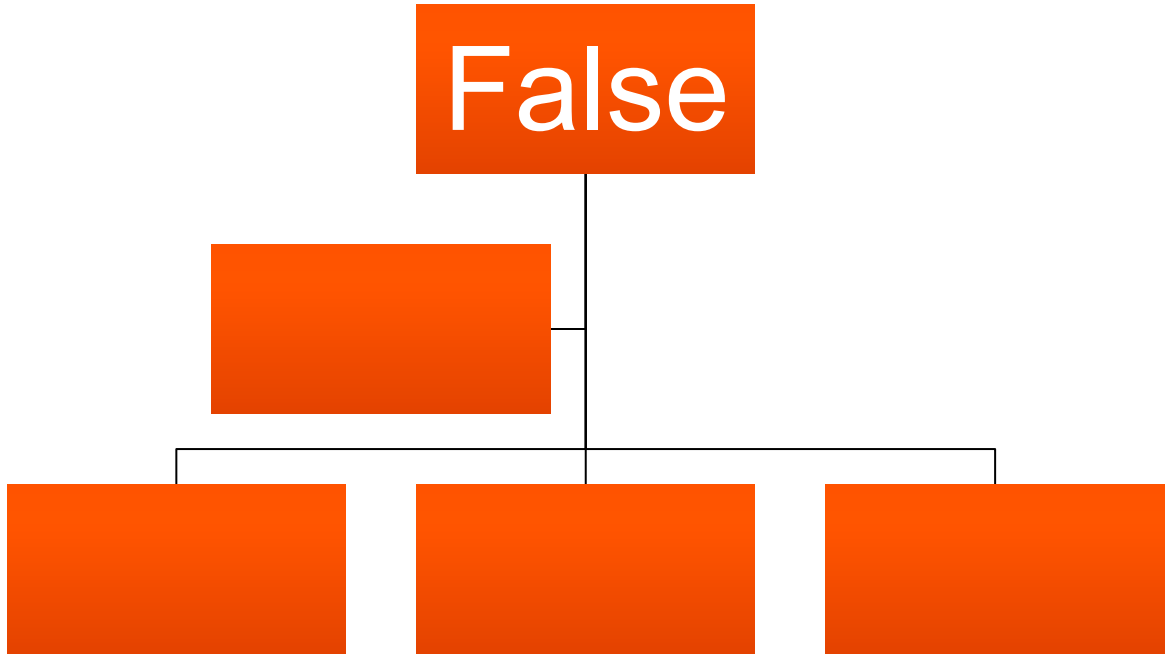
# Triggers

- Data manipulation, notification and automated validation
- Some triggers are dependent on attributes, eg Workflow, or Audit
  - Or components – eg a Template, or a Conversion Map
  - Some triggers also have timing components – eg 'delays'

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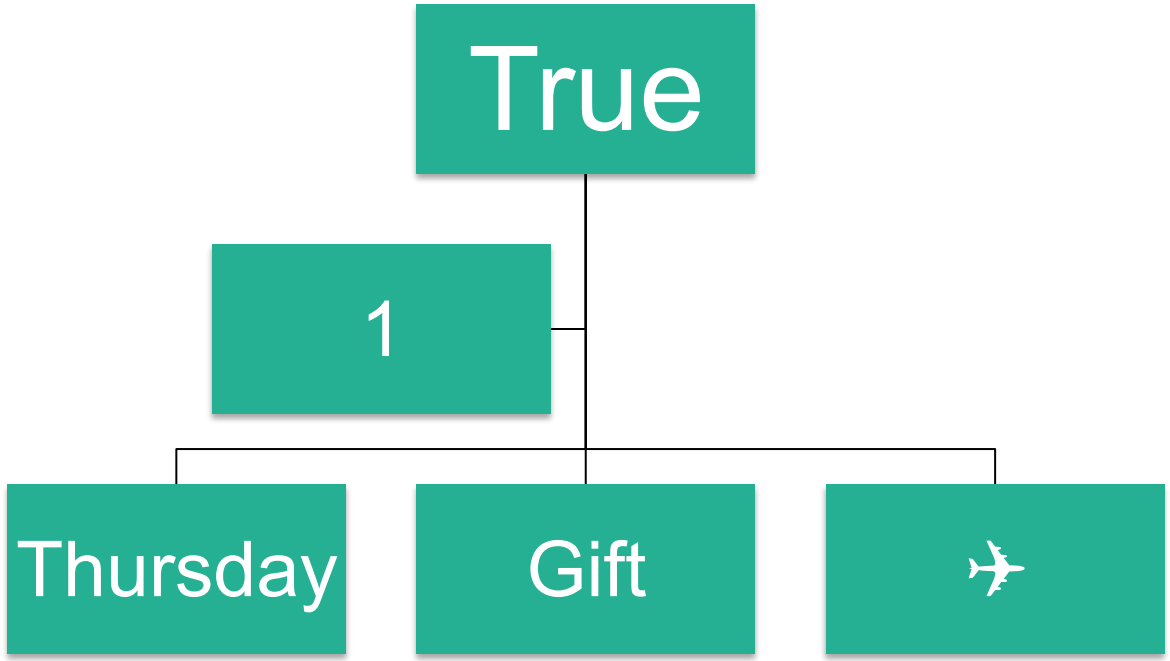


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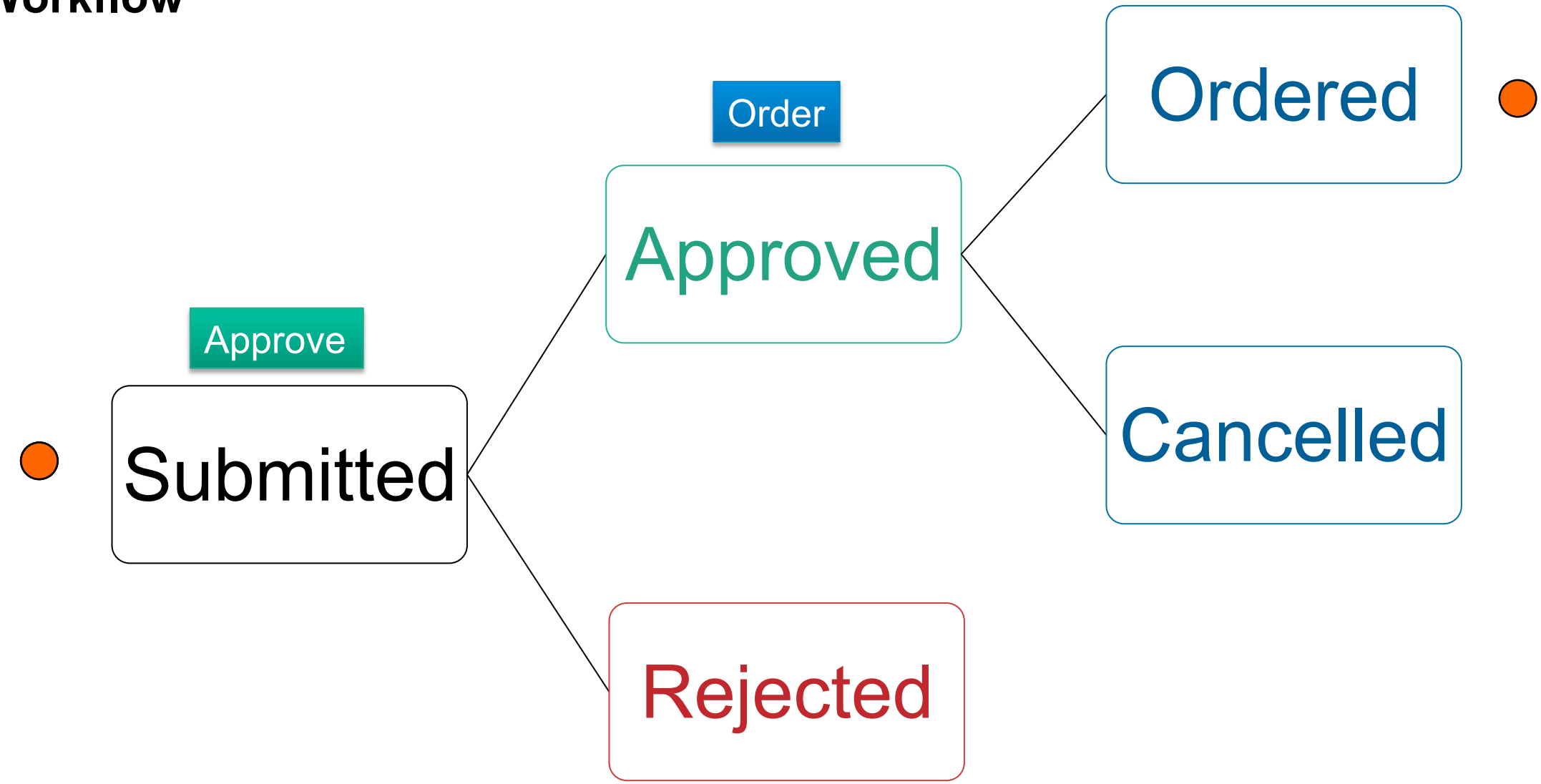
# Workflow

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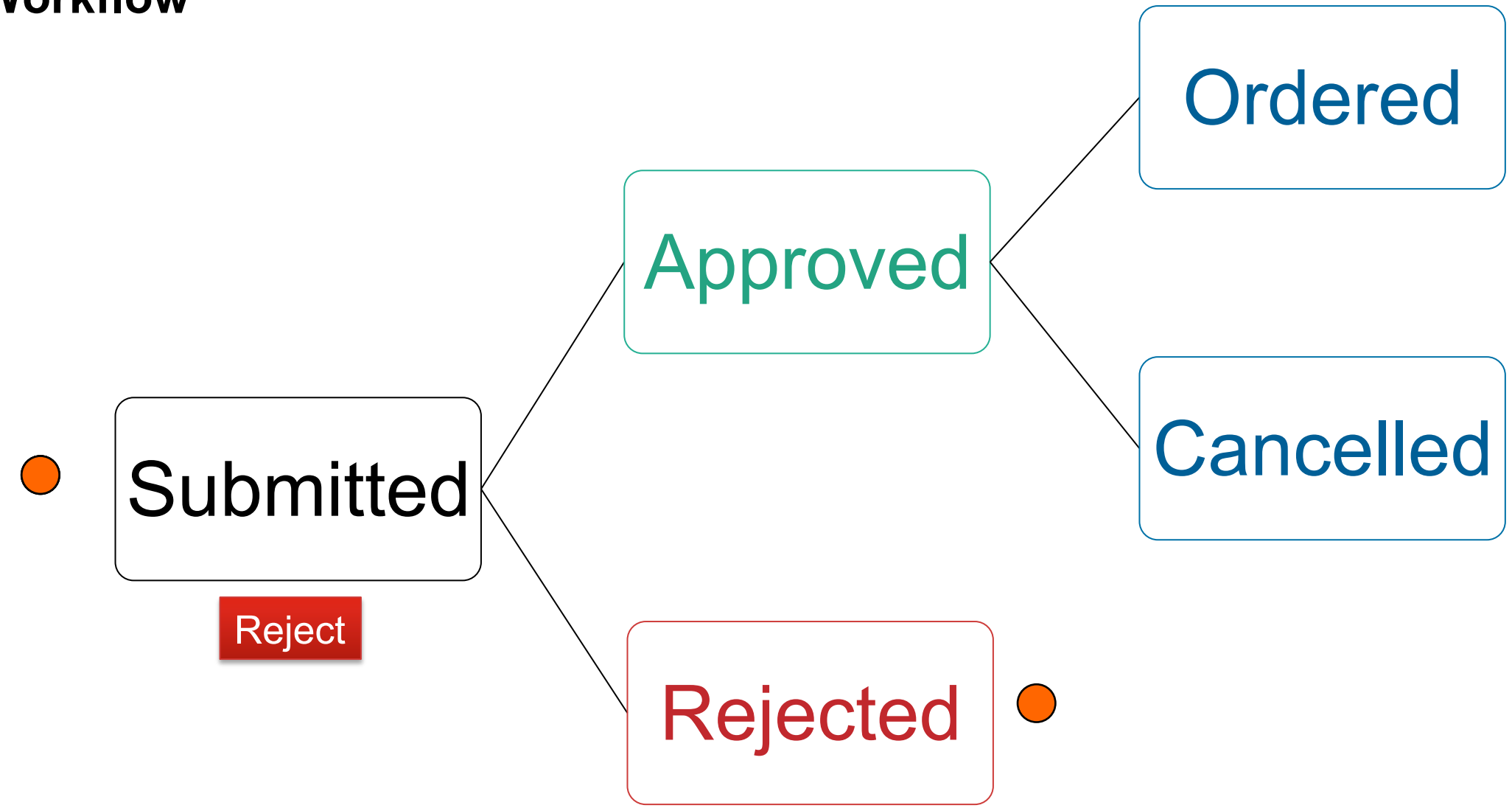
# Workflow

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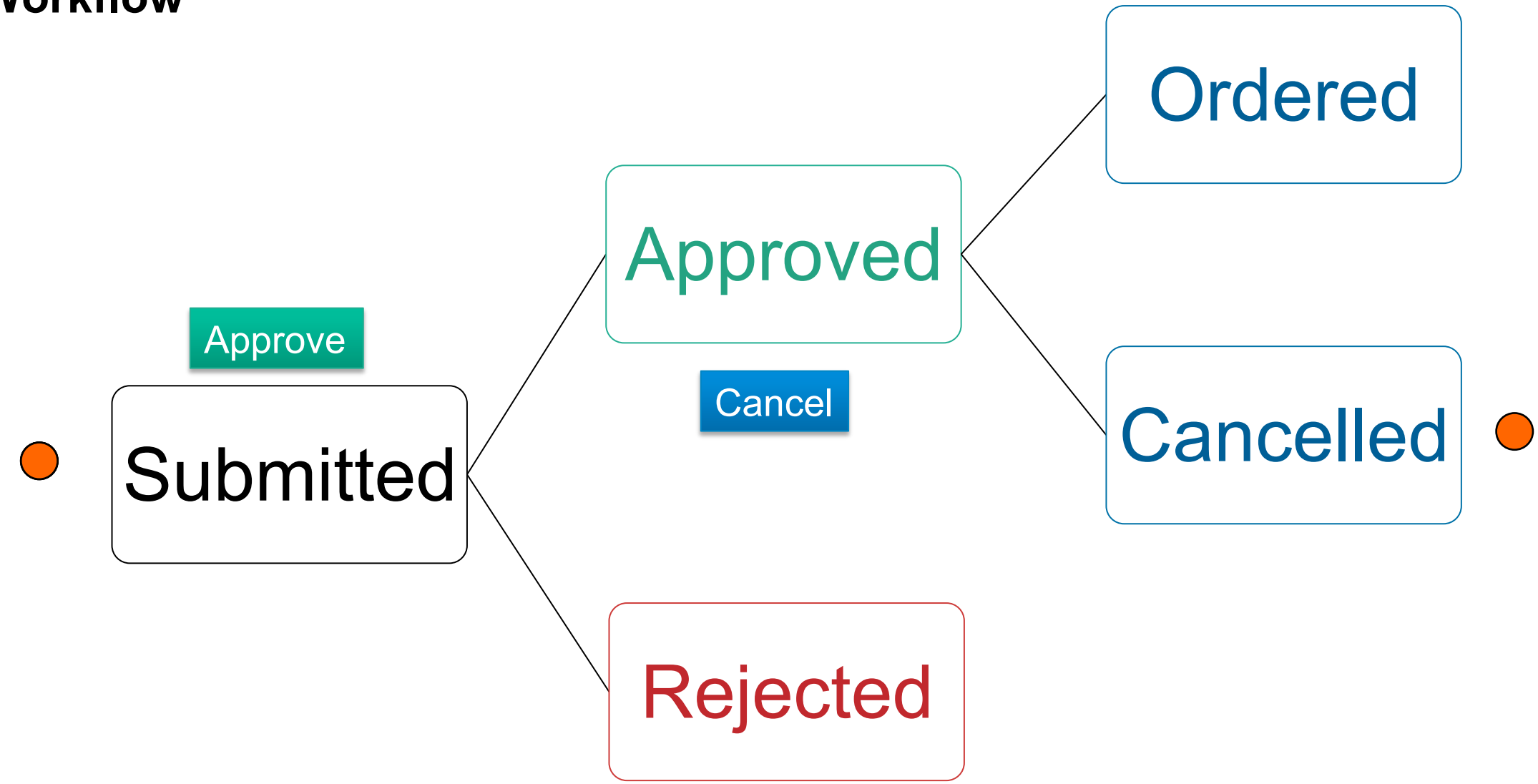
# Workflow

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# Templates

```
<H2>
     <div style="color:purple;">
          {!R12546733.name}
     </div>
</H2>
{!R12546733.streetAddr1}<br/>
{!R12546733.streetAddr2}<br/>
{!R12546733.city} {!R12546733.state}<br/>
```

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# Templates

## Sam's Fishing Supplies

Building 5

57 Davidson Road

LEURA NSW

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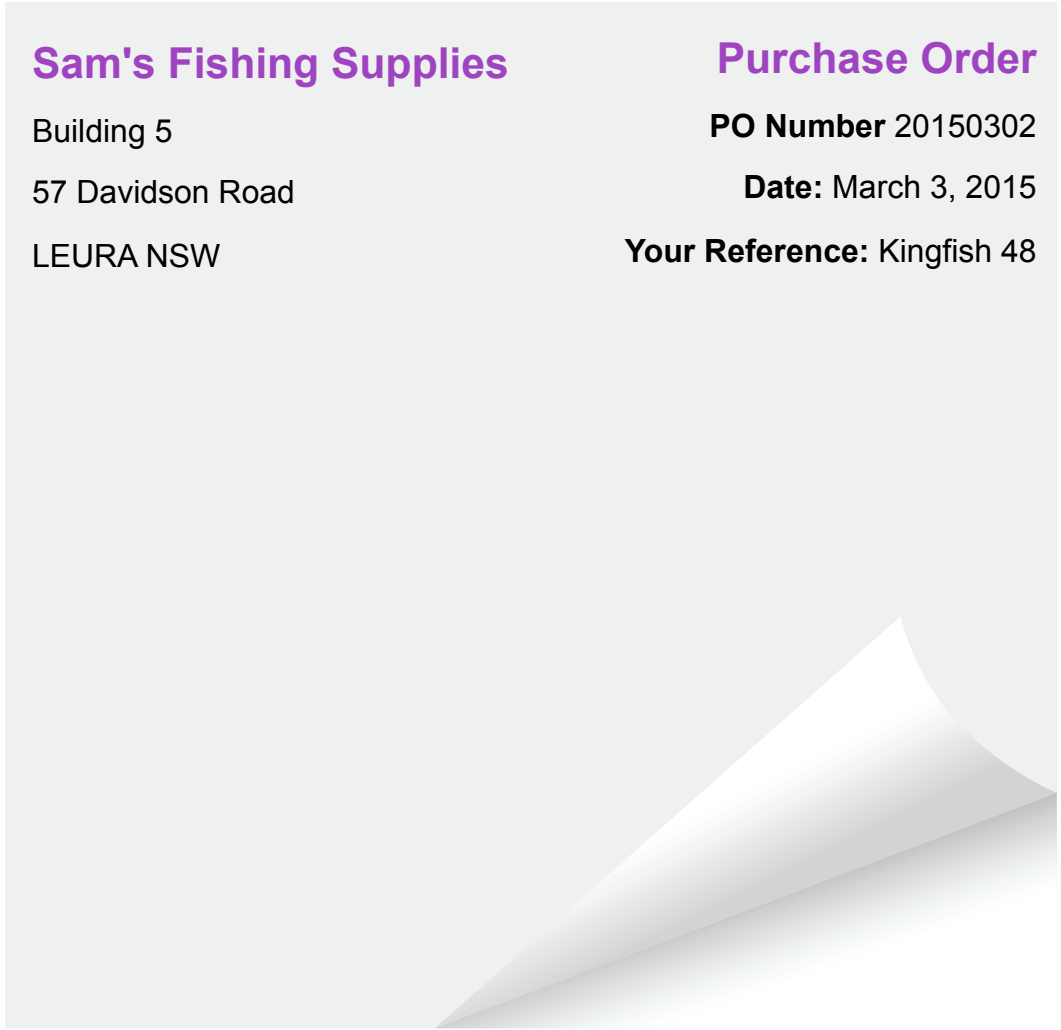
# Templates


Sam's Fishing Supplies
Building 5
57 Davidson Road
LEURA NSW
Purchase Order
PO Number 20150302
Date: March 3, 2015
Your Reference: Kingfish 48

# Templates

## Sam's Fishing Supplies

Building 5

57 Davidson Road

LEURA NSW

## Purchase Order

**PO Number** 20150302

**Date:** March 3, 2015

**Your Reference:** Kingfish 48

## Craig's Led Zeppelin Merchandise

Building 6

57 Davidson Road

LEURA NSW

## Purchase Order

**PO Number** 20150303

**Date:** March 4, 2015

**Your Reference:** 181

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# Demo

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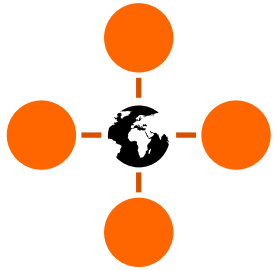
# Data-Driven Application Requirements for Connectivity

**Business Intelligence & Analytics Applications**

**Web Applications**

**Database Federation Applications**

**Business Applications**



**Data Integration**

**Mobile Applications**

**High-performance connectivity**

**Extensible to additional data sources**

**Single interface regardless of data source**

**Cloud/On-premise data source access**

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# Connectivity across various data sources

## [Relational Data]

## [Big Data]

## [Cloud Data]

## [Data Warehouse]

## [On-Premise Data]

## [Marketing Operations Data]

## [CRM Data]

# Rapid Application Development Features

- Mobile app development
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- Triggers
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# Custom Development Toolkit

- ISV and Private Cloud customers can extend the native Rollbase capabilities
  - Custom Java-based Triggers
  - JSP pages
  - Custom Authentication methods

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# Your Feedback Matters

## Best Tweets

2 Winners get a GoPro Hero 4 Camera worth USD 399 each!

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## Take 10 Surveys

2 Winners get a Microsoft Band worth USD 199 each!

Take 10 surveys and stand a chance in the lucky draw!

bit.do/apjspark

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