

# Progress Pacific: A Technical Overview

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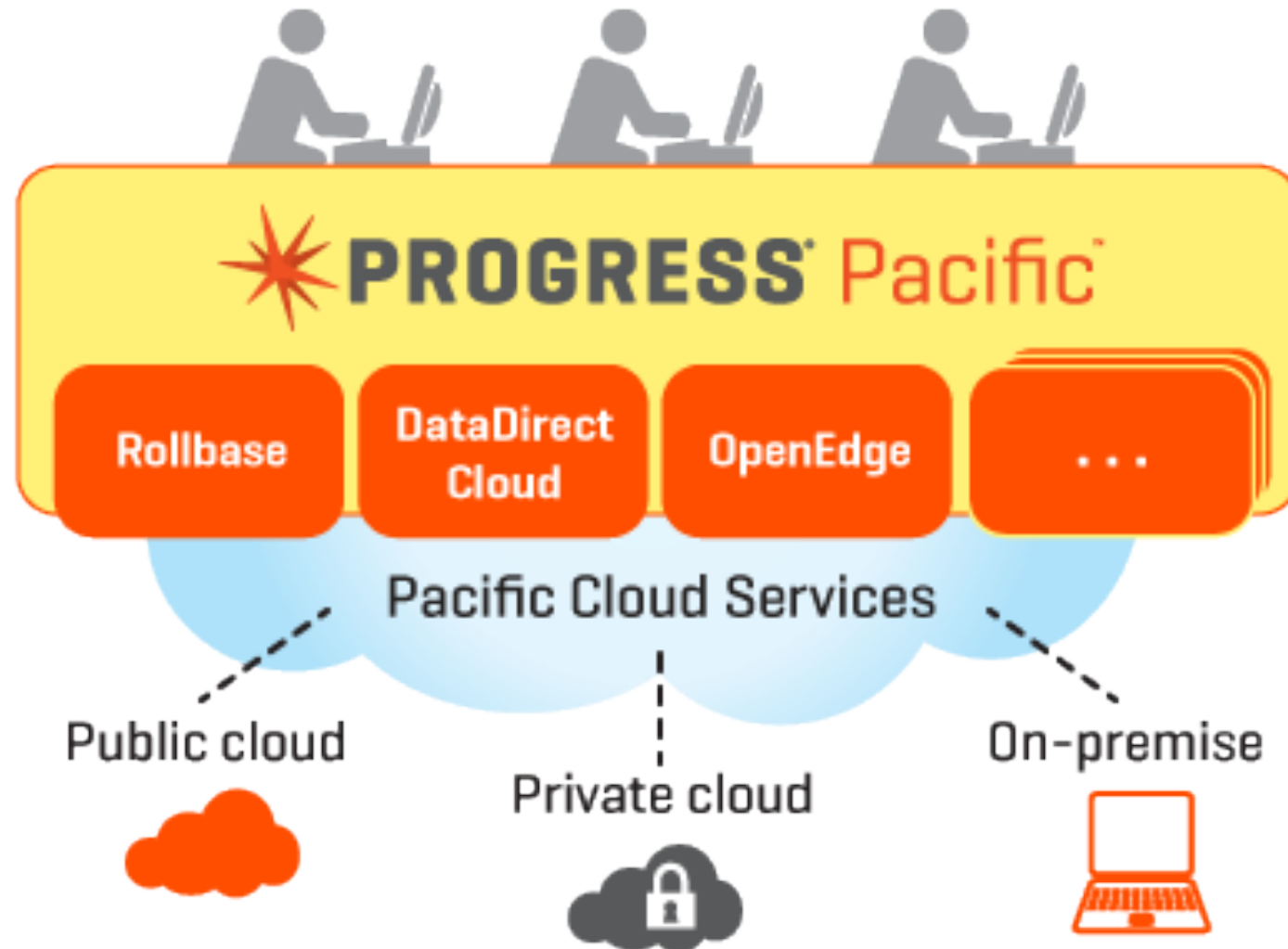


# PROGRESS

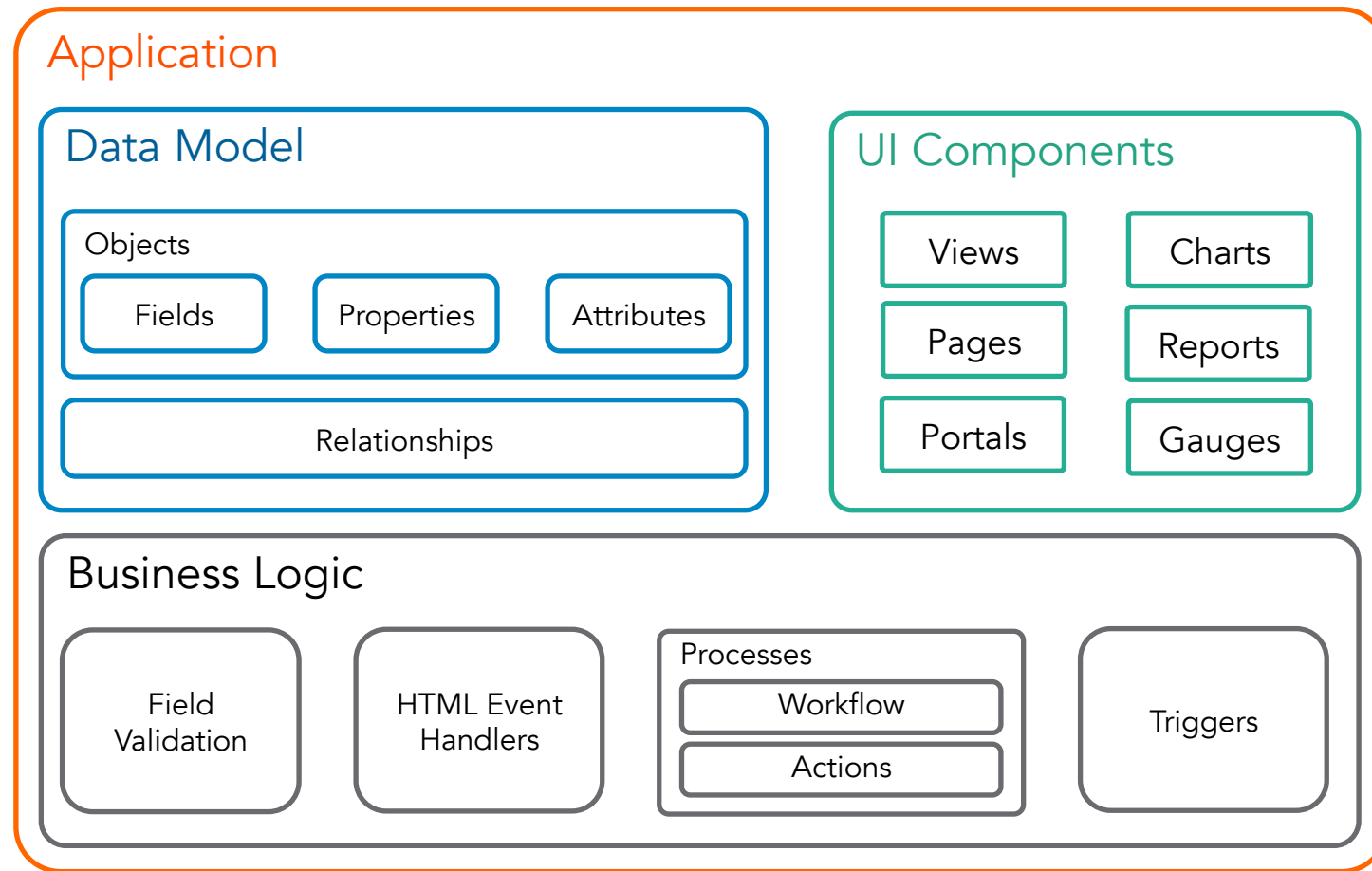
To power the **rapid creation and deployment** of powerful business applications that are **driven by data** and **unlimited by device or cloud**

# Progress Pacific

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# Pacific Rollbase Application Components



# The Data Model



# Objects

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- Basic building block of applications
- May represent any kind of business data: Customers, Employees, Products, etc.
- Records are actual instances of Objects, for example, for an Object called Employee each record would represent an actual employee in your company



# Components of an Object

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## Fields

- Specifies what type of data is stored with each Object record

## Properties

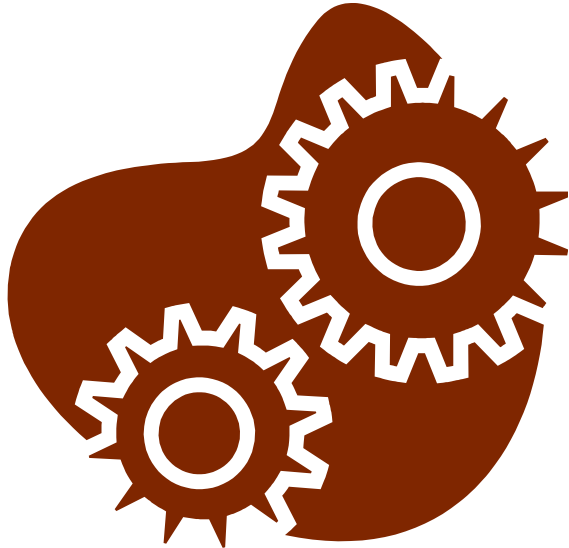
- Define the characteristics and basic behavior of the record

## Attributes

- Control specific Object behavior and contain a default set of fields

# Two Ways to Create Objects

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From Scratch



Based on External Data



# UI Components



# Pages

## Application Page

The screenshot shows the 'New Account' page in the Rollbase CRM. The browser address bar indicates the URL is <https://www.rollbase.com/prod1/m/main.jsp>. The page features a navigation menu with options like Leads, Accounts, Contacts, Opportunities, Cases, Documents, CRM Dashboard, and About CRM. The main content area is titled 'New Account' and includes several sections: 'Owner & Rating' with a search for 'Robert McDonald' and a rating dropdown; 'Account Information' with fields for Account Name, Number, Type, Industry, Annual Revenue, Employees, Ownership, Ticker Symbol, Phone, Fax, Website, and Status (set to 'Active'); 'Location and Address Information' with fields for Billing and Shipping streets, cities, states, ZIPs, and countries; and 'Description Information' with a text field for the account description. Buttons for 'Save', 'Save & New', and 'Cancel' are visible.

## Page Editor

The screenshot shows the 'Page Editor' for the 'New Account' page. The browser address bar indicates the URL is <https://www.rollbase.com/prod2/designer/pageEdit.jsp?view=main&pageId=80295191&tblId=80295425>. The page is titled 'Page Editor: New Account' and includes a 'Save' button and a 'Save & Synchronize' button. The editor displays the layout of the 'New Account' page, with various fields and sections arranged in a grid. A green highlight is visible under the 'Script Component' section. The page editor interface includes a left sidebar with navigation options and a right sidebar with a 'Default New File' button. The main content area shows the layout of the 'New Account' page, with fields for Account Information, Location and Address Information, and Description Information. The page editor interface includes a left sidebar with navigation options and a right sidebar with a 'Default New File' button.

# Views

## View Page

The screenshot shows the Salesforce interface for the 'Acme Sales Manager' application. The 'Accounts' tab is selected, displaying a table of account records. The table has columns for Account, Customer Name, Type, Annual Revenue, and Billing Country. The records are sorted by Annual Revenue in descending order.

Account	Customer Name	Type	Annual Revenue	Billing Country
Account	GenePoint	Customer - Channel	\$30,000,000.00	
Account	United Oil & Gas, UK	Customer - Direct		
Account	United Oil & Gas, Singapore	Customer - Direct		
Account	Edge Communications	Customer - Direct	\$139,000,000.00	
Account	Burlington Textiles Corp of America	Customer - Direct	\$350,000,000.00	USA
Account	Pyramid Construction Inc.	Customer - Channel	\$950,000,000.00	France
Account	Dickenson plc	Customer - Channel	\$50,000,000.00	USA
Account	Grand Hotels & Resorts Ltd	Customer - Direct	\$500,000,000.00	
Account	Express Logistics and Transport	Customer - Channel	\$950,000,000.00	
Account	University of Arizona	Customer - Direct		
Account	United Oil & Gas Corp.	Customer - Direct	\$5,600,000,000.00	
Account	sForce			US
Account	Progress Software	Customer - Direct		United States

## View Editor

The screenshot shows the 'View Editor' interface for the 'All Accounts' view. It allows users to customize the view's name, columns, sorting, and grouping. The 'View Name' is set to 'All Accounts'. The 'Columns' section shows a list of available fields and the selected fields for the view. The 'Setting and Grouping' section allows users to specify the fields to sort and group the view by.

**View Name:** All Accounts

**Columns:**

- Available Columns: Accountnumber, Accountsource, Active, Billingcity, Billingpostalcode, Billingstate, Billingstreet, Customerpriority, Description, Fax, Industry, Jigsaw
- Selected Columns: Account, Customer Name, Type, Annual Revenue, Billing Country

**Setting and Grouping:**

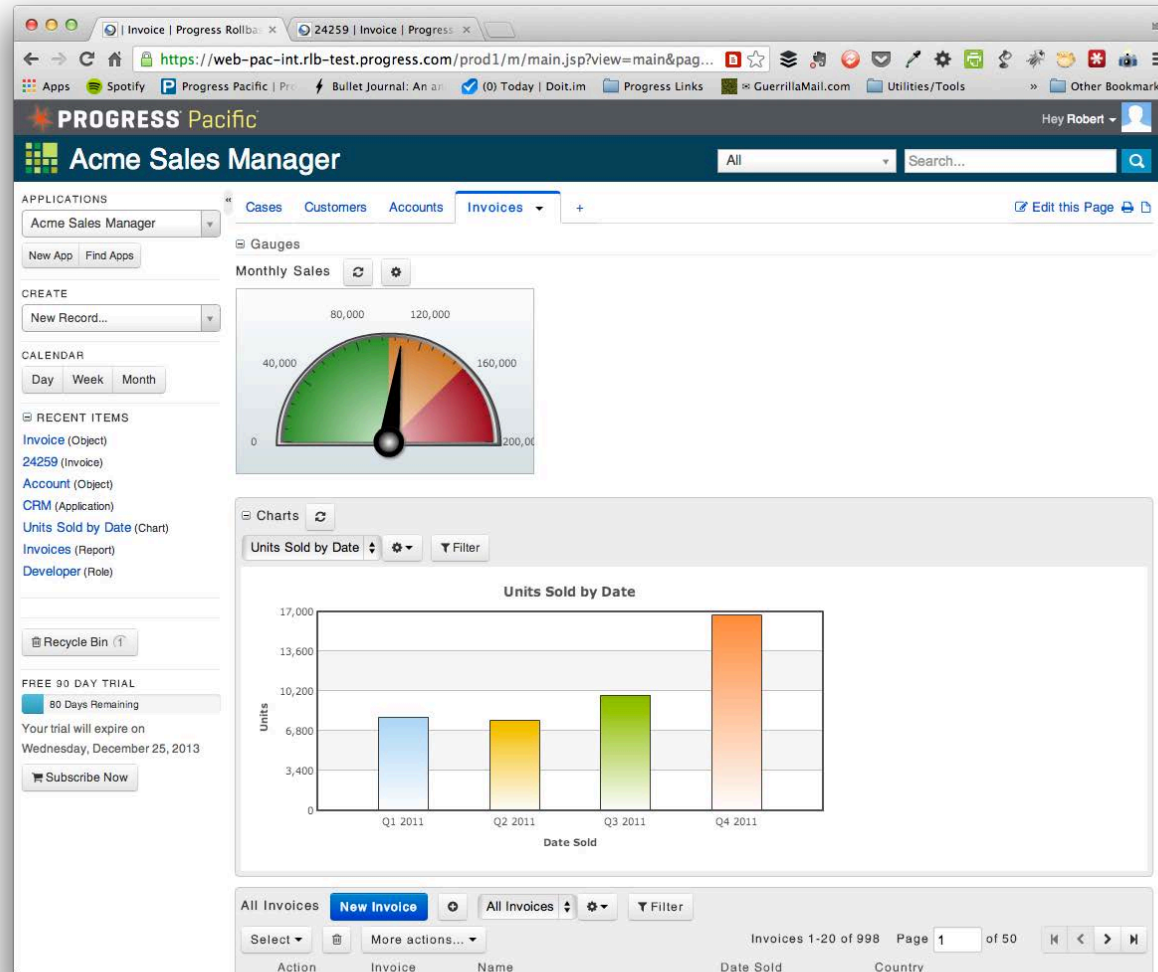
Group By: --None--

Sort By: --None--

...then by: --None--

...then by: --None--

# Charts and Gauges



Business Logic



# Field Event Handlers

- Customize behavior of HTML components
- May use AJAX API when you need to add/update/retrieve data from other Rollbase records
- Examples:

Description This is an example of what can be done with Event handlers. When I land in this text entry box and the `onfocus` event is fired the text box is 8 rows high. When I move my cursor out of this box and move, for example, to the field below the box shrinks to 2 rows high.

Tags

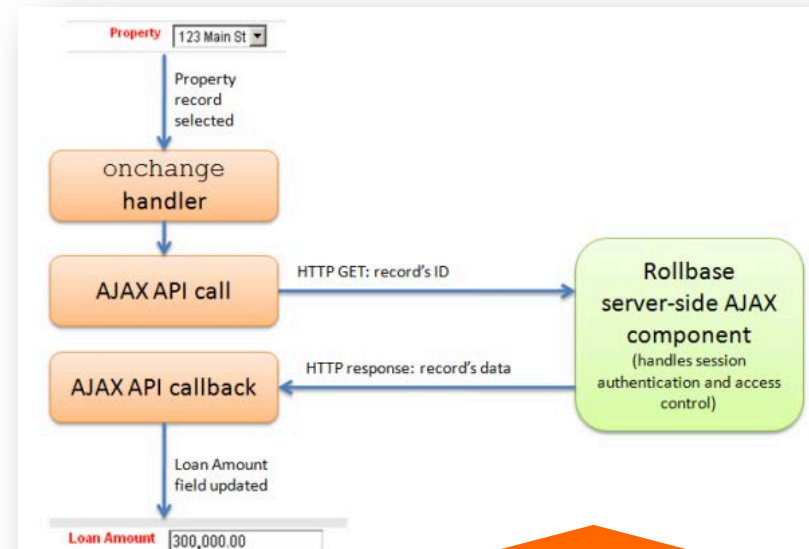
This screenshot shows a text area with a blue border. The text inside describes an event handler that changes the height of the text area based on focus events. Below the text area is a 'Tags' input field.

Description This is an example of what can be done with Event handlers. When I land in this text entry box and the `onfocus` event is fired the text box is 8 rows high. When I

Tags

This screenshot shows a text area with a blue border. The text inside describes an event handler that changes the height of the text area based on focus events. Below the text area is a 'Tags' input field.

Change the size of the text area when the user enters enters and leaves the text box



Look up the appraised value of a selected property record to prepopulate the loan value of a mortgage application

# Statuses

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- Indicate current state of a record
- Similar to picklist values, with a special meaning in Workflow
- Determines the set of currently available Workflow Actions
- May be assigned through Workflow Actions, or explicitly by editing an object record.



# Actions

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- An operation that a user can perform on a record
- You can use Actions to
  - Change Workflow status
  - Create A Related Record
  - Send Email
  - Generate A Template-based Document
  - Run a group of triggers
- May be limited only to certain roles or users
- Group Actions: Allows the action to be performed on a group of records in a list View

The screenshot shows the configuration for a 'Send Email' action. The 'Change Status To' dropdown is set to 'Do Not Change'. The 'Reply To' section has three radio buttons: 'User's Email Address' (unselected), 'Default Address' (selected), and 'Other' (unselected) with an adjacent text input field. The 'Use Field' dropdown is set to 'Created By: Email Address'. The 'Send To' field contains the placeholder text '{!#CREATED\_BY.email}'. Below this are empty input fields for 'CC' and 'BCC'. The 'Email Template' dropdown is set to 'Mail One'.

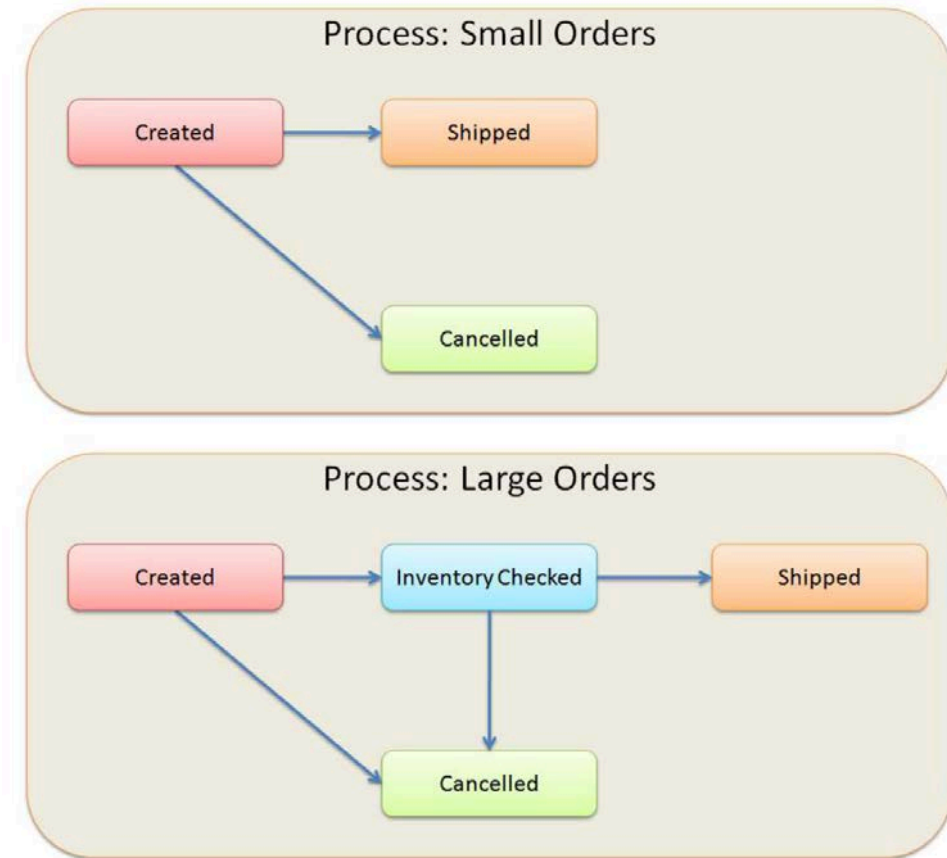
Setting up a Send Email Action



# Processes

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- A container for a set of statuses and actions, that as a whole make up a particular workflow process
- May define more than one process



# Triggers

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- Enables automatic workflow upon record creation, update or deletion
- Can configure any number of Triggers to perform:
  - Automated validation
  - Programmatic validation
  - Notification
  - Data manipulation and other activities
- All triggers may be conditional, i.e. Run triggers on orders > \$10,000

## Timing Options

Before/After Create

Before/After Update

Before/After Delete

On Finalize

On Login

On Logout





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