Progress Pacific & Building Next Generation Applications

Workshop

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PROGRESS EXCHANGE 2013

DISCOVER. DEVELOP. DELIVER.

Welcome to the Rollbase Workshop

Your Hosts

- Mike Ormerod, Matt Robinson, Pedram Abrari, Laurent Poulain, Srikanth Idury, Susan Houniet

This Workshop

- You will build a basic CRM application
- The work is segmented in 5 parts
- We synchronize after each part

Today's Goals

- Enjoy working with Progress Rollbase
- Get the full picture of building a business application
- Take it further by building an external facing web portal

Workshop Flow, Begin at 9 AM / Finish at Noon

9:00 AM	Introduction and Part 1 - Framework
9:30 AM	Part 2 – Create the Lead Object
10:15 AM	Part 3 – Enable Workflow for Leads
11:00 AM	Part 4 – Lead to Account Conversion
11:30 AM	Part 5 – Create a Portal and Q&A

Workshop Flow, Begin at 1 PM / Finish at 4 pm

1:00 PM	**Introduction and Part 1 - Framework**
1:30 PM	Part 2 – Create the Lead Object
2:15 PM	Part 3 – Enable Workflow for Leads
3:00 PM	Part 4 – Lead to Account Conversion
3:30 PM	Part 5 – Create a Portal and Q&A

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Introduction

Build Cloud Business Applications Quickly

Rollbase Workshop
Progress Exchange 2013
Boston

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Rollbase Overview

Build

- Point & click, drag & drop development in a browser
- Business users can create apps without coding
- Developers can go much further with JavaScript, APIs and custom components

Deploy

- Publish applications and deploy them to one or more tenants
- Role- and user-based access control, tenant and user provisioning, and many more tools provide robust deployment capabilities
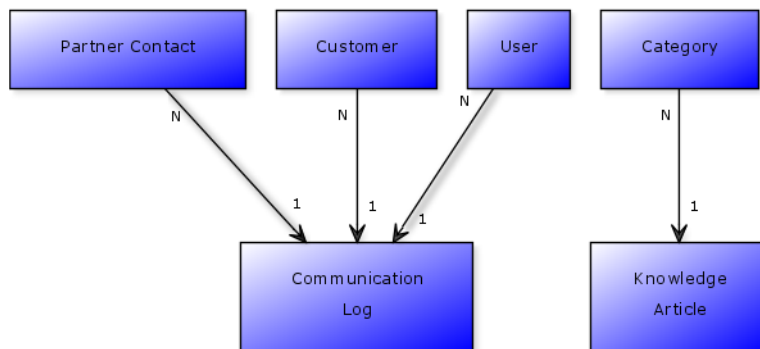
Manage

- Central dashboard to manage servers, databases, tenants, users, applications and more
- Monitor system components and user activity, access tenants to provide support, resource metering, etc.

Core Concepts (Objects, Fields, Relationships, Workflow, Triggers, Portals)

Objects	New Object	Import from...	Filter By Application	All		
Action	Object ▲	Deployed	Attributes		Integration Name	Last Updated
Edit	Approval	✔	Workflow		$APPROVAL	06/14/2013 05:07 PM
Edit	Catalog Item	✔			catalog_item1	06/24/2013 10:12 AM
Edit	Category	✔	Workflow		category	07/04/2013 02:25 PM
Edit	Communication Log	✔	Communication Log		COMMLOG	07/04/2013 02:25 PM
Edit	Customer	✔	Contact, Location, Portal Visitor		customer5	06/24/2013 10:12 AM
Edit	Department	✔			$ORG_DEPT	06/13/2013 11:23 AM
Edit	Function	✔			$ORG_FUNC	06/13/2013 11:23 AM
Edit	Group	✔	Organization		$GROUP	06/13/2013 11:23 AM
Edit	Knowledge Article	✔	Workflow		knowledge_article	07/04/2013 02:25 PM

Knowledge Base: Entity-Relationship Diagram

Tip: This diagram visually represents objects included (explicitly or implicitly) in the "Knowledge Base" application, and relationships between them. Please wait while the UML generator loads this image.
Read more

- Applications are data-driven – Objects are the core business entities
- Objects have properties and attributes associated with them
- Fields are the core building block of Objects
- Object relationships and cardinalities are modeled visually
- Objects can have workflow
- Triggers define business logic
- Portals are external-facing applications

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Your Workshop Environment

At your disposal

- Assistance by Progress Experts attending
- Your own laptop with network access
- Your Rollbase 30 day evaluation account
- The workshop book leading you task by task

End Result

Completed Lab Work

- A quick look at the completed CRM application you will created in this workshop

Part 1 – Framework

You Will	- Create a basic application and object definitions - Create relationships and modify user interface
Your Tasks	- Login to your Rollbase account or activate a new one - Create a CRM application - Create Account and Contact objects - Create a relationship between Account and Contact

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Summary Part 1

- You familiarized yourself with Rollbase

- You understand how to create an application, objects, and relationships between them

- You edited the user interface for working with object records using the page editor

- You are ready to move on to a more sophisticated object

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11:00 AM	Part 4 – Lead to Account Conversion
11:30 AM	Part 5 – Create a Portal and Q&A

Part 2 – Leads

You Will	▪ Create a Lead object and work with the Record Name field ▪ Add new Fields and edit Views
Your Tasks	▪ Define a Lead object ▪ Use the Record Name field to define Company name ▪ Add columns for viewing Leads in Views ▪ Add new fields to expand the Lead definition

Summary Part 2

- You created an object with Workflow capabilities

- You familiarized yourself with the Record Name field

- You edited Views and added new fields to expand an object definition

- You are ready to move on to defining a workflow process

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Part 3 – Enable Workflow for Leads

You Will	- Create a Workflow process for Leads - Create a Lead record and move it through the process
Your Tasks	- Define workflow statuses and actions - Assign actions to statuses - Move a lead record through the workflow process

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Summary Part 3

- You familiarized yourself with Workflow capabilities

- You understand how to create statuses and actions

- You understand how workflow is used by end users

- You are ready to move on to building a Trigger

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Part 4 – Lead to Account Conversion

You Will	▪ Create a Conversion Map ▪ Create a Trigger
Your Tasks	▪ Create a Conversion Map to map the fields in a Lead record to the fields in an Account record ▪ Create a Rollbase Trigger to initiate the automatic conversion when the desired condition is met

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Summary Part 4

- You familiarized yourself with Conversion Maps

- Familarized yourself with Triggers

- Became comfortable creating Triggers and defining JavaScript-based conditions and business logic

- You are ready to move on to building a Portal

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Part 5 – Framework

You Will	- Create a Portal to gather new leads - Become familiar with building external-facing applications
Your Tasks	- Create a Portal - Create a Welcome page, a New Lead page, and a Thank You Page - Create links between these pages - Test the Portal

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Summary Part 1

- You familiarized yourself with Rollbase Portals

- You understand how to create a Portal and a set of portal pages

- You understand how to link these pages together to form a fully functional website

- Congratulations, you've built your first application!

Q&A

Questions?

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