Mastering Progress Rollbase, Inside and Out

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About Us

Dr. Ganesh Neelakanta Iyer

- Principal Engineer at Progress Software Development, Hyderabad
- Finished Masters and PhD from National University of Singapore in 2008 and 2012 respectively
- Research interests: Cloud computing, Game theory, Pricing, Software Quality Analysis

Chandrasekhar Gontla

- Senior QA Engineer at Progress Software Development, Hyderabad
- Hold Masters in Computer Applications from Osmania University, Hyderabad
- Strong experience in SaaS and PaaS testing

Agenda

Authenticate With Your Way

Different User Personas

Organizational Structure Matters

Store@S3

?

Customizing Your App

PROGRESS Rollbase

- Build all of your **web and mobile** business applications in one place from the comfort of your Web browser

- Write a minimum amount of code (typically **80% clicks, 20% code**)

- **Reduce your development time and resource requirements, accelerate your time-to-market, simplify application delivery and deployment,** and provide a proven cloud platform on which to build all of your custom business applications

HIGHLIGHTS:

- **Runs anywhere, no vendor lock-in**: Deploy applications on-premises, in hybrid environments, in any cloud

- **Integrates out-of-the-box** with leading CRM systems, such as Salesforce.com, Oracle and Microsoft

- Provides a growing library of **pre-built sample applications** you can start from

- **Salesforce.com and Force.com Migration**: Automated tool moves applications to Progress Rollbase in minutes

- **Custom branding and App Store for ISVs and Resellers**

Snapshot of Core Rollbase Features

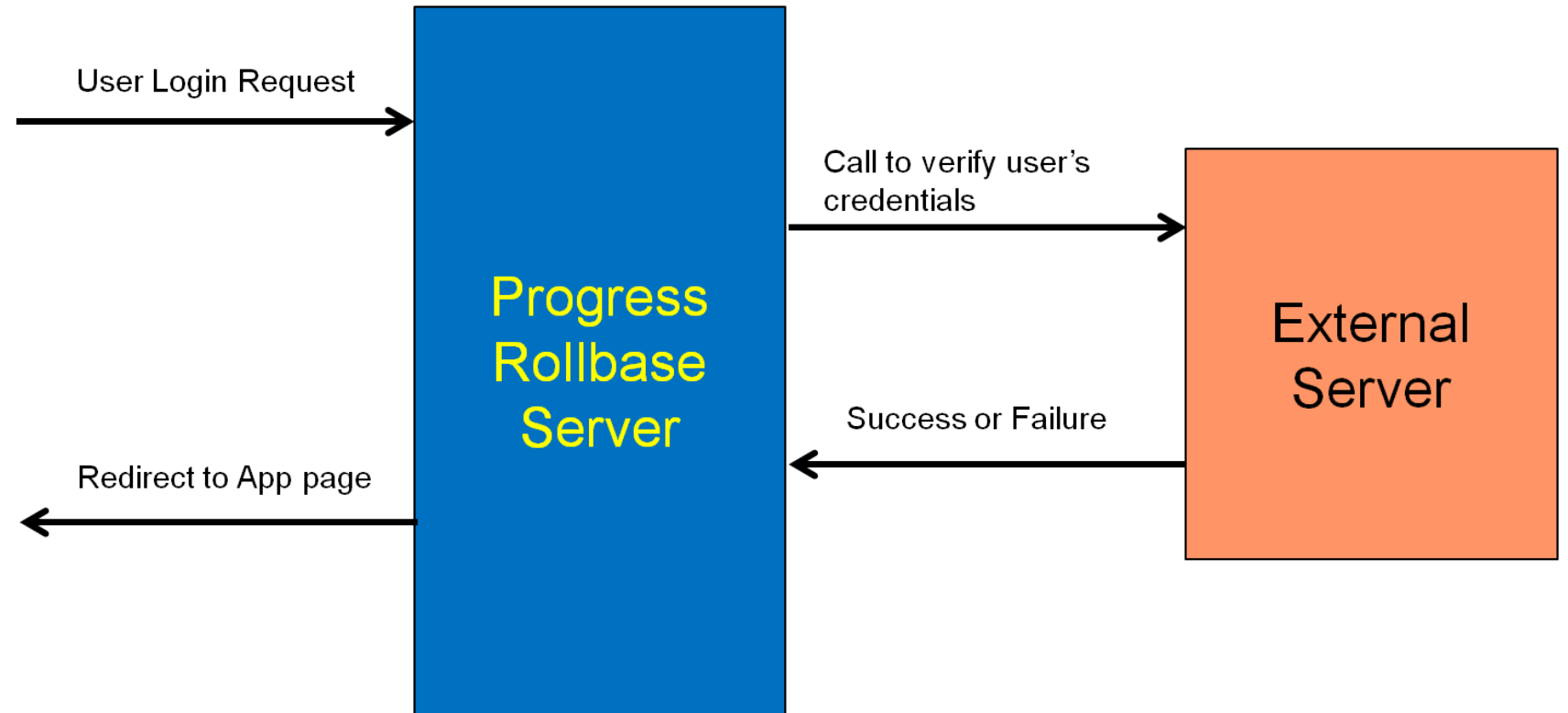|	
Fast Development	■ Point and click wizards, Quick start templates ■ Workflow and Business Logic, Portals
Open Deployment	■ Hosted vs Private vs Hybrid Cloud ■ Scalable Multi-Tenant Cloud Architecture, Anytime and anywhere
Robust Integration	■ Web APIs – SOAP, REST, AJAX, SQL Query API ■ Google Apps Integrations – Gmail, Google Calendar, Google Docs, Salesforce.com and Force.com Migration
Easy Application Management	■ Central Dashboard ■ Role and User-based permissions. Security and authentication
Rollbase Mobile	■ Easily assemble, deploy and manage mobile applications ■ Provide an intuitive, native mobile experience using a hybrid architecture that eliminates cos

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Part 1:
External Authentication, Roles and Permissions

External Authentication

- Rollbase supports following authentication types
  - Password
  - LDAP
  - HTTP POST
  - HTTP GET
  - OpenEdge

User Login Request

Call to verify user's credentials

Progress Rollbase Server

External Server

Success or Failure

Redirect to App page

Rollbase is no longer managing users' passwords and "Change My Password" link is disabled. We strongly recommend that you modify an email template which welcomes new users and clearly indicate selected authentication method

User Roles

System Roles		
	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 are granted to another user role (or Portal visitor) who has created a particular record

Custom Roles		
	Customer	Who can log and manage support tickets
	Support Engineer	Who looks after different support tickets from customers

Record Creator Role

- **A pseudo role which will be applied on the top of a user (or Portal Visitor) to give specific permissions**

- **Example**

  - **Visitors to your "Customer Service" Portal can create Support Request records, as well as browse and manage a list of their own requests**

Different Types of Permissions

In addition to role-based permissions, Progress Rollbase allows individual permissions to be assigned directly to particular users

User Hierarchy of Permissions

Component Level Permissions

Permissions Through Relationships

Field Level Permissions

LDF

LDF (Location, Department and Function) Permissions

- Used to cater to the security needs of larger organizations with more complex internal structures

- You can interpret LDF dimensions in any way that matches your organization's needs

Adding LDF permissions to large number of objects may affect application's performance. We do not recommend adding LDF permissions to dependent objects (such as document like items) which are accessible only through master object

Actions to Use 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

Let's See a Demo

Support Center Application in Rollbase

1. With External Authentication for OpenEdge

2. Record Creator Role for Customers so that they can view and manage their records

3. LDF Permissions for Support Engineer so that they can view support tickets from certain locations

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Prerequisites for External Authentication Using Progress Openedge

OpenEdge Lib Folder ▶ **Rollbase Lib Folder** ▶ **Restart the Rollbase Instance**

OpenEdge Lib Folder	Rollbase Lib Folder
■ certj.jar	■ certj.jar
■ cryptoj.jar	■ cryptoj.jar
■ o4glrt.jar	■ o4glrt.jar
■ psccerts.jar	■ psccerts.jar
■ RBSPAclient.1.0.0.jar	■ RBSPAclient.1.0.0.jar
■ Sslj.jar	■ Sslj.jar

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Part 2:
3rd Party Storage and Custom Development Toolkit

Third Party Cloud Services for Storage

- An ISV or a Private Cloud user can configure the customer tenants to use Amazon S3 or Microsoft Azure on a tenant by tenant basis

- After you have enabled cloud storage, the files will be moved to your storage account in an asynchronous mode

- The tenant administrator will receive an email with summary of the moved files. After that, you can delete the local files to save disk space

Using a third party cloud service for storage can impact performance because files and images are served from that third party. We recommend to test the performance of selected storage provider before deploying cloud storage in production scenarios

Custom Development Toolkit

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

Custom Java-Based Triggers
Implement Trigger
Develop trigger definition and trigger logic

Configure
Update event.xml and language properties

Compile and Deploy
Obtain a jar file and copy in into appropriate component

Support Ticketing System ▼
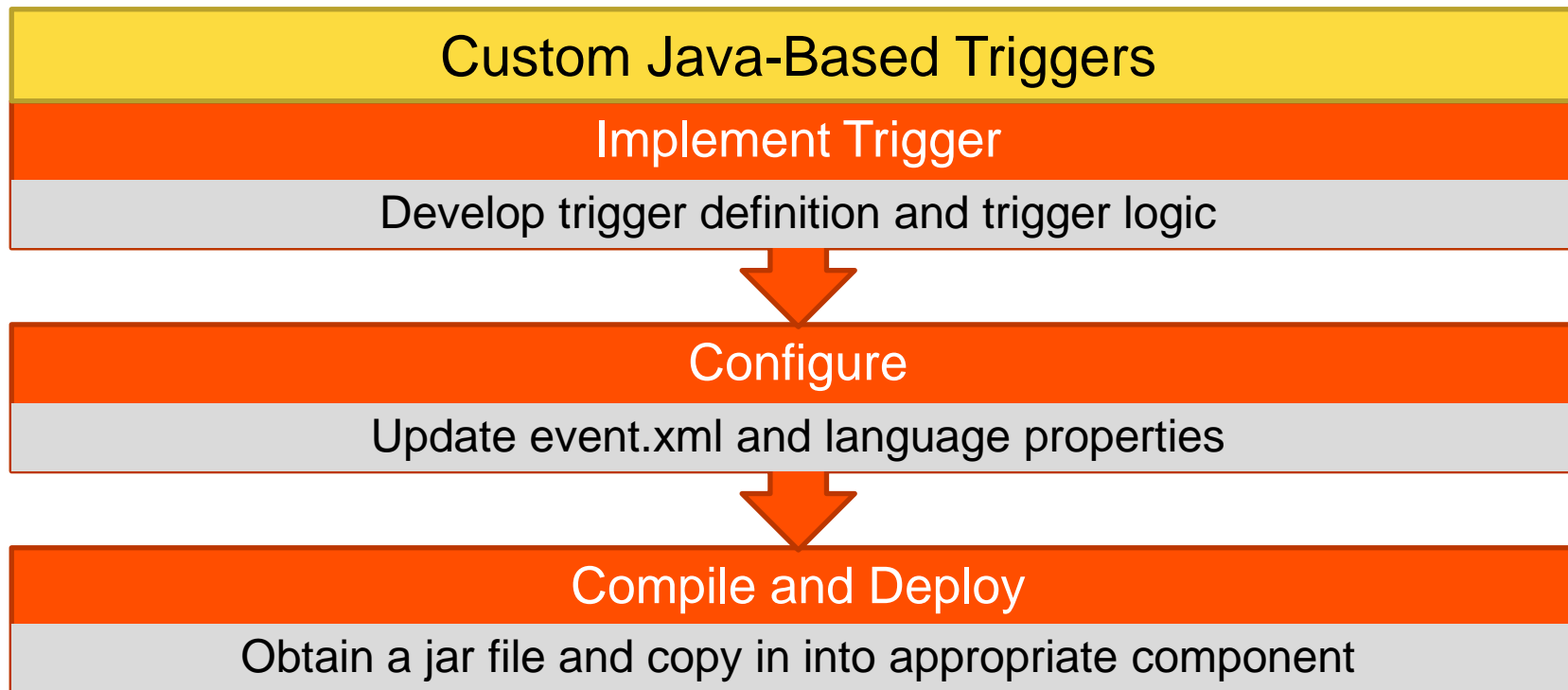
New Application

Getting Started

Install Applications

■ RECENT ITEMS

Ticket51 (Ticket)

Ticket50 (Ticket)

Group_1 (Group)

Ticket (Object)

Organization Management

(Application)

sep11pri1_fn sep11pri1_ln

(User)

Ticket3 (Ticket)

Ticket2 (Ticket)

Ticket1 (Ticket)

■ USERS ONLINE (1)

sep11pri1_fn sep11pri1_ln

(Away)

🗑 Recycle Bin (0)

Tickets ▼ | ⊕ New

New Ticket

[Save] [Save & New] [Cancel]

Ticket Information

Ticket	[_____]
Component	-- Please select -- ▼
Severity	-- Please select -- ▼
Ticket Details	[text area]
Attachment	[Choose File] No file chosen
	(2048 KB max)

One of the two fields to be mandatory

Organization

			Department	[_____]
Location	[_____] 🔍			
Function	[_____] 🔍			

Workflow Information

Workflow Status	Created ▼

[Save] [Save & New] [Cancel]

Let's See a Demo

Support Center **Application in Rollbase**

1. One of my customers to use storage as Amazon S3

2. Any support ticket created should have either a description or an attachment to be mandatory through a custom trigger

Agenda

Authenticate With Your Way	Different User Personas	Organizational Structure Matters
Store@S3	✔	Customizing Your App

Progress Rollbase has Many More Exciting Features
for Rapid Application Development

- Mobile app development

- Backup

- Batch jobs

- RESST/SOAP/AJAX APIs

- Workflows

- Triggers

- Reports

- Charts, gauges

- Templates

- Cloud data access through DataDirect Cloud

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