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DRIVING CUSTOMER CENTRICITY

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# Pega Mobile Workshop

Stephanie Sauerbry  
Jeff Rogers



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# Agenda: Pega Mobile 101

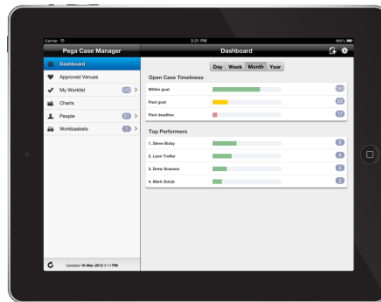
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- ▶ The Mobile Landscape
- ▶ Establishing a Mobile Strategy
- ▶ Pega Mobile



# Mobile Trends: More People with More Devices

More  
smartphones  
than PCs<sup>1</sup>



Mobile devices  
are the **most  
numerous**  
devices<sup>2</sup>

Tablets alone should pass PCs<sup>3</sup>

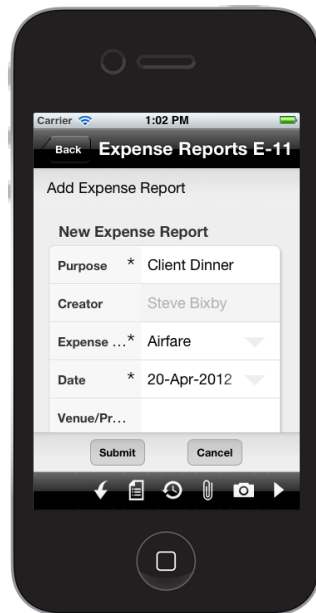


- ▶ <sup>1</sup> "Business Insider: The Future of Mobile" (2012)
- ▶ <sup>2</sup> "Gartner Mobile Customers: New Devices, New Interactions, New Opportunities" (2012)
- ▶ <sup>3</sup> "Business Insider: The Future of Mobile" (2012)



# Mobile Trends: More Data than Voice

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60% of mobile Web<sup>2</sup>



- ▶ <sup>1</sup> "Bango: Smartphone market drives 600% growth in mobile web usage" (2010)
- ▶ <sup>2</sup> "Flurry Blog: Mobile Apps Put the Web in Their Rear-view Mirror" (2011)
- ▶ <sup>3</sup> "Morgan Stanley: Economy + Internet Trends" (2009)

# Mobile Trends: Mobile in the Enterprise

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Mobile Anywhere<sup>1</sup>  
Enterprise Product Work<sup>2</sup>



- <sup>1</sup> "PCWorld: What do Smartphone Users Want?" (2010)
- <sup>2</sup> "Forrester: Mobile Applications Will Empower Enterprise Business Processes" (2010)
- <sup>3</sup> "Gartner: Mobile Enterprise Strategy Key Initiative Overview" (2010)

# Establishing a Mobile Strategy: Design for Mobile First

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**FOCUS**

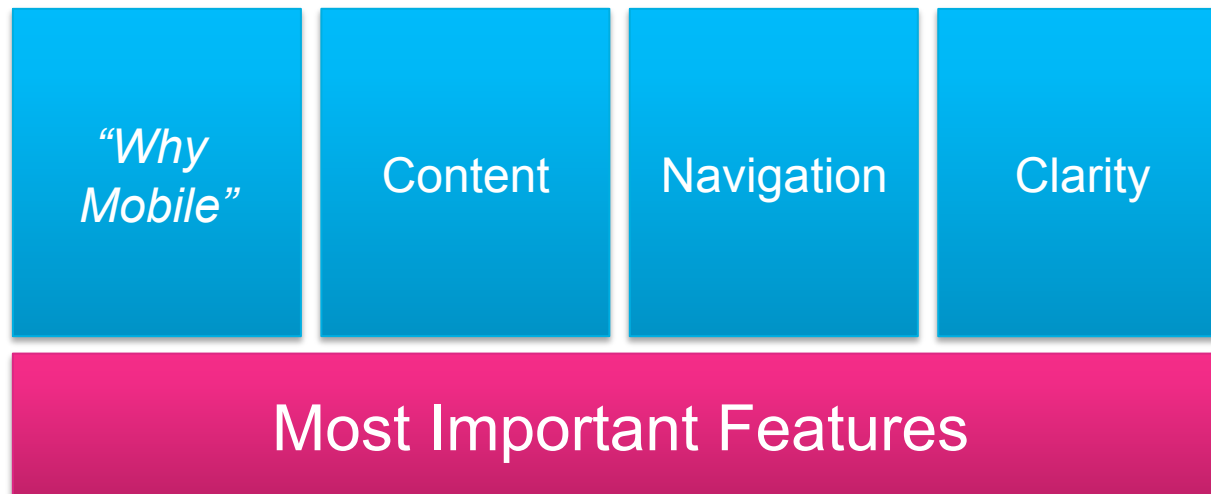
**INNOVATION**

**FUTURE**

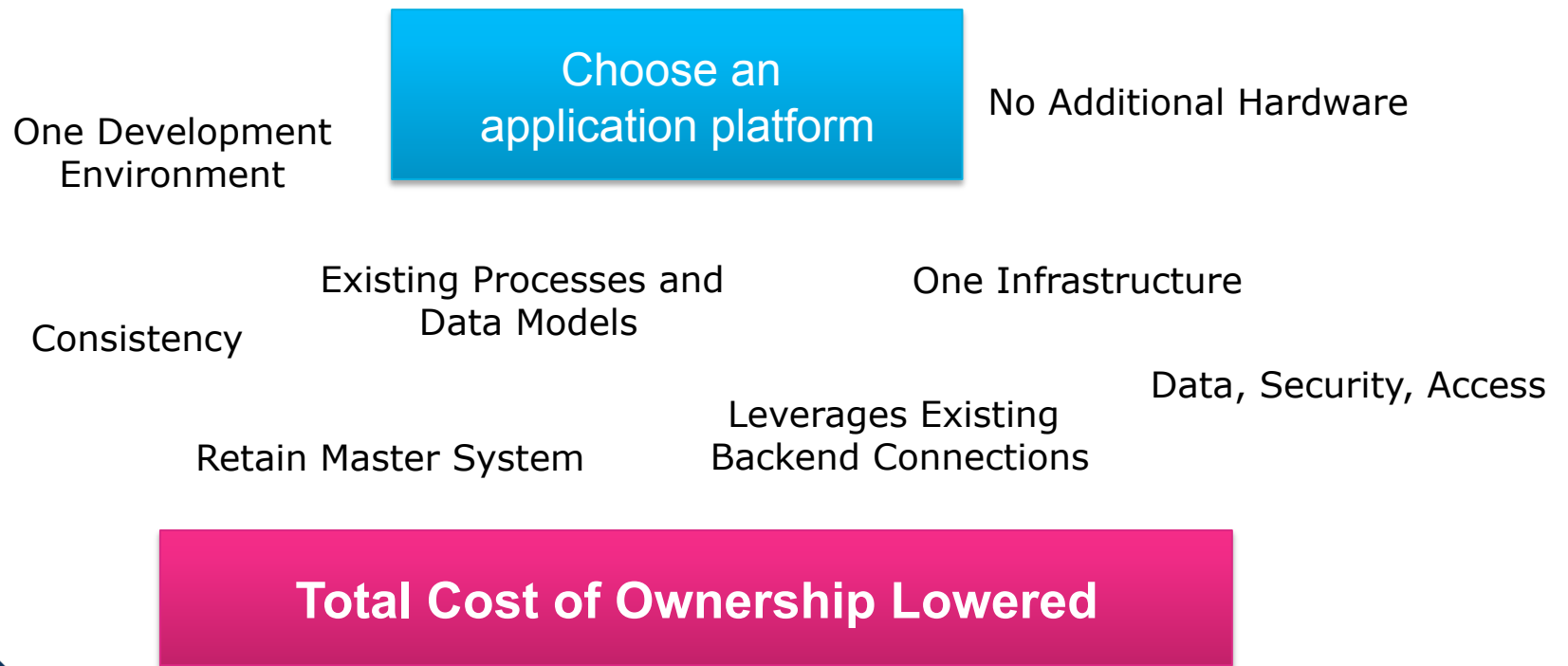


# Establishing a Mobile Strategy: User-Centered Approach

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# Establishing a Mobile Strategy: How To Go Mobile



# Establishing a Mobile Strategy: Pega Mobile

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# Pega Mobile Vision

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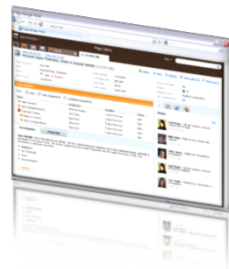
- ▶ First Class Pega Experience



- ▶ “No Compromises” Experience



- ▶ Touch Points



- ▶ Easy Developer Experience

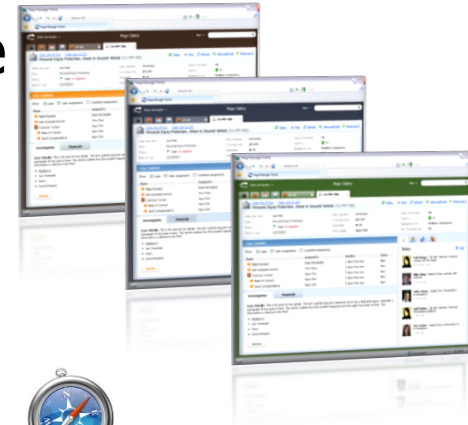


# Pega Mobile: Another Channel

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- ▶ Multi-channel User Experience

- ▶ Traditional Desktop Browser



- ▶ Mobile Browser



- ▶ Mobile App





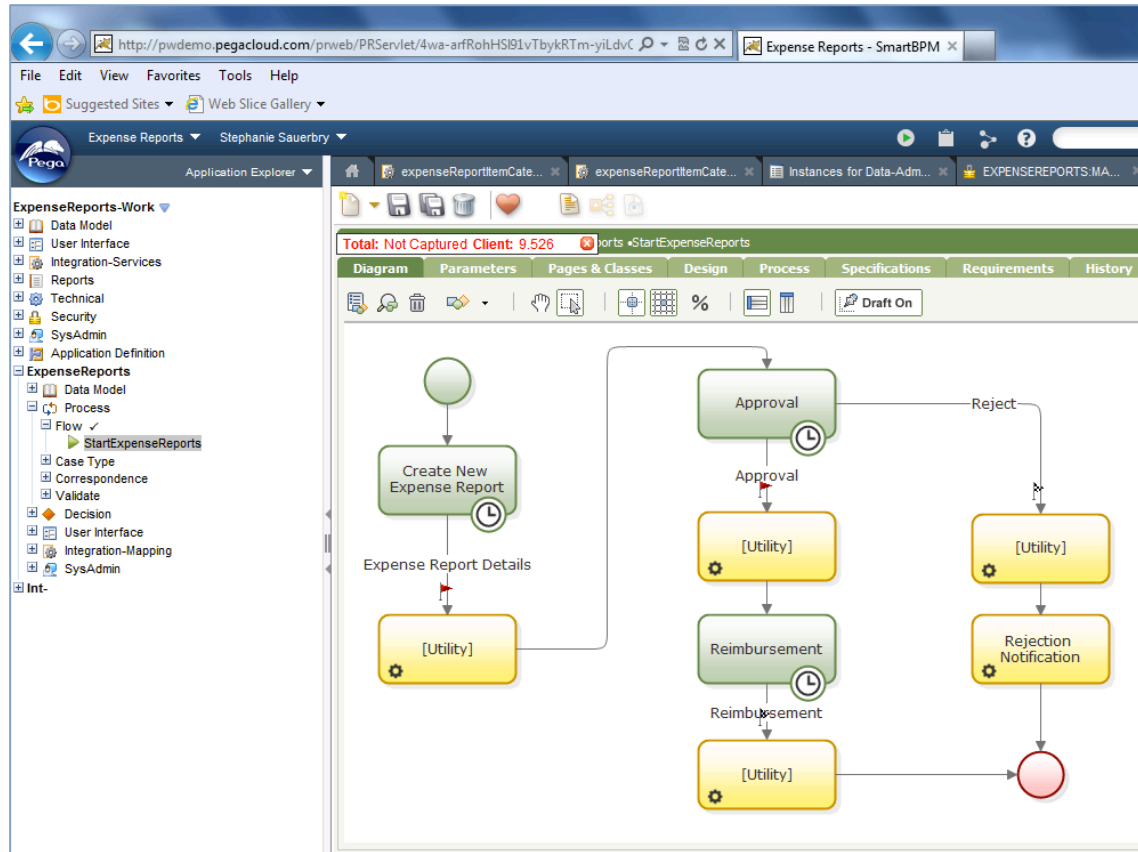
# Why Pega Mobile

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- ▶ Build once, deploy everywhere
- ▶ Device and OS agnostic
- ▶ Rich and adaptable interface



# Build Once, Deploy Everywhere: Pega Process Designer



# Build Once, Deploy Everywhere: Pega UI Designer

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The screenshot displays the Pega UI Designer web application. The browser address bar shows the URL: `http://m.pegacloud.com/prweb/PRServlet/4wa-arRohHSB1vTbykRTm-yiLdvOhxiaw`. The application explorer on the left shows a tree view for 'ExpenseReports-Work' with various components like 'Data Model', 'User Interface', and 'Section'. The main workspace shows a 'SECTION ExpenseReports-Work-ExpenseReports-AddExpenseReport' with a 'New Expense Report' form. The form has a table with columns 'LABEL' and 'FIELD'. The 'FIELD' column contains several input fields: 'Purpose', 'Creator' (with control 'pxCreateOpName'), 'Expense Report Type', 'Date', 'Venue/Provider', 'Approval', 'Meal', 'Other Diners/Attendees', 'Payment', and 'Total'. A 'Cell Properties' dialog is open for the 'Date' field, showing 'Property' as `.ExpenseReport(1).Date`, 'Control' as `pxDateTime`, and 'Behavior' as 'Date'. The dialog also has tabs for 'General' and 'Advanced'.



# Build Once, Deploy Everywhere: Pega UI Designer

A screenshot of a web browser displaying the Pega Case Manager Portal. The browser address bar shows the URL: m.pegacloud.com/prweb/PRServlet/4wa-arfRohEJjyANYMMYm0vex-aHKWg2\*/!STANDARD?. The page title is "Expense Reports". The user is logged in as "Walter Heeger". The main content area shows a form for "Add Expense Report" with the following fields:

Case ID	E-116	Urgency	10	Status	New
Created	8 days, 1 hour ago	Goal		Last Update	1 day, 1 hour ago
Created by	Walter Heeger	Deadline		Last Updated By	Walter Heeger

Purpose *	Conference Hotel Stay
Creator	Walter Heeger
Expense Report Type *	Lodging
Date *	5/22/2012
Venue/Provider	
Approval	<input checked="" type="checkbox"/>
Meal	
Other Diners/Attendees	
Payment	Credit Card
Total	806.45

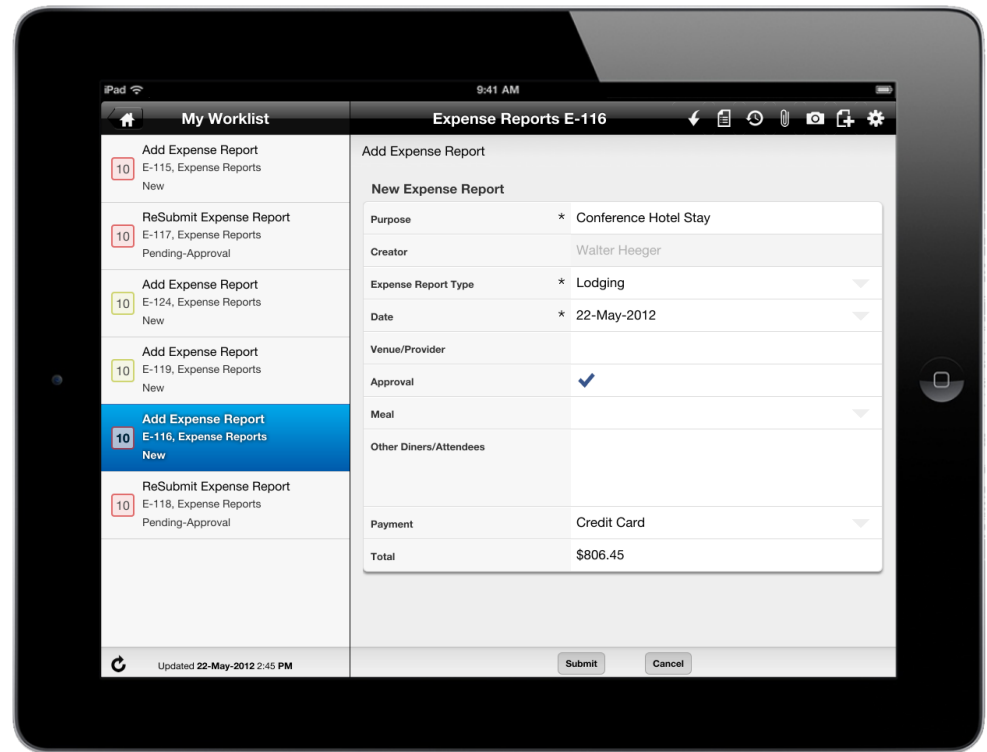
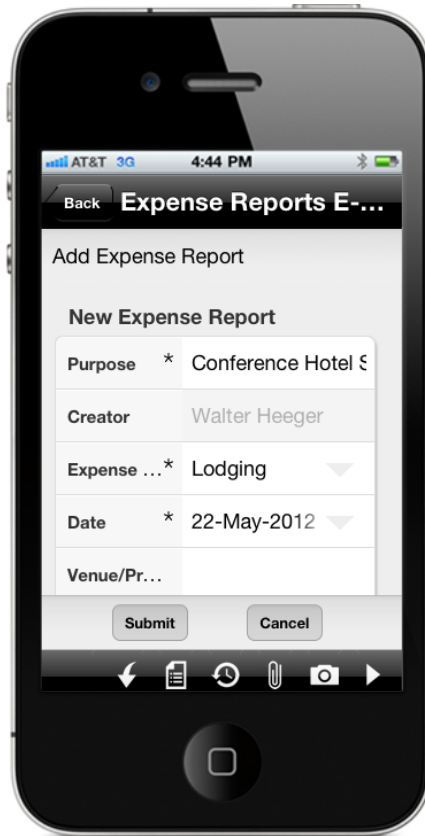
Submit

Other Actions: Review, Save, Where Am I, Audit, Print, Follow, Tags

Notes: No Items



# Build Once, Deploy Everywhere: Pega UI Designer



# Model-Driven



- ▶ Dynamic Mobile Interfaces
  - Harness and Section Auto-Generation

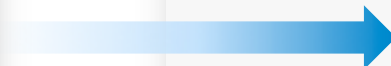
LABEL	FIELD
First Name	
Last Name	
City	
State	AK
ZIP	

LABEL	FIELD
Admitted Date	
Room Number	

LABEL	FIELD
Age	
Height	
Weight	
ICD 9 Code	280



Carrier 7:25 PM 100%

Pega Case Manager New Patient

- Dashboard
- My Worklist 15
- Cases
- Reports 4
- People 8
- Workbaskets 3

Personal

First Name

Last Name

City

State AK

ZIP

Administrative

Admitted Date

Room Number

Medical

Age

Height

Weight

ICD 9 Code 280

Updated 12/6/11 7:25 PM Submit Cancel



# Model-Driven

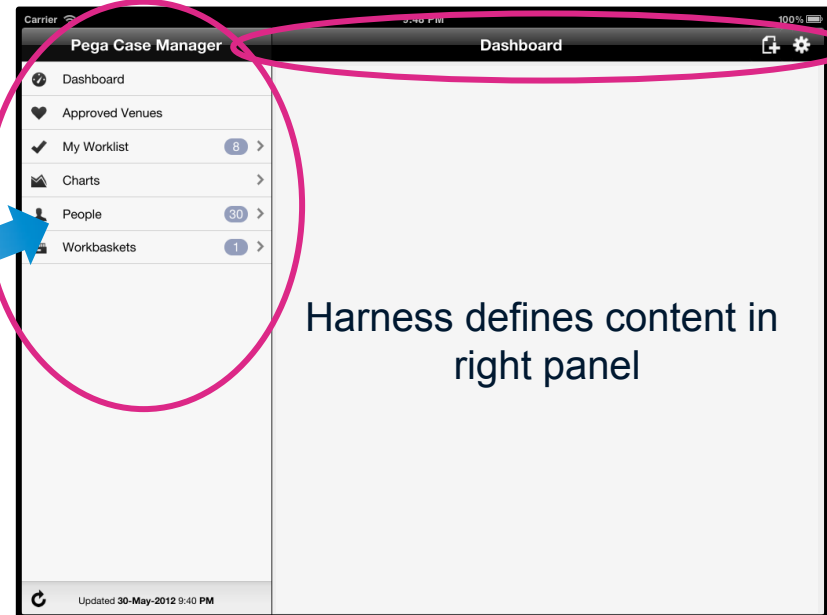
- ▶ Portal Layout and Navigation
  - Leverage existing data model
  - **Customizable** with pre-defined UI structure

Navigation (Mobile) @basedass pyCaseManagerMain

Editor Pages & Classes History

Add Above Add Below Add Child Node Delete Refresh

Label	Type	Action(s)
○ Dashboard	Item	Harness
○ Approved Venues	Item	Create Work
☐ My Worklist	Item	
○ .pyInstructions	Item List	Open Assignment
☐ Charts	Item	None
○ Year To Date Expenses	Item	Harness
○ Year to Date Revenue	Item	Harness
☐ People	Item	Run Activity
☐ .pyUserName	Item List	Run Activity
○ .pyInstructions	Item List	Open Assignment
☐ Workbaskets	Item	Run Activity
☐ .pyWorkBasket	Item List	Run Activity
○ .pyInstructions	Item List	Open Assignment



Harness defines content in right panel



# Build Once, Deploy Everywhere: Always Up To Date



A screenshot of the Pega Designer Studio interface. On the left is a tree view showing the project structure for 'ExpenseReports-Work', including 'Data Model', 'User Interface', 'Reports', 'Technical', 'SysAdmin', 'Application Definition', 'ApprovedVenues', and 'ExpenseReports'. Under 'ExpenseReports', there is a 'Data Model' and a 'Property' section with a list of properties: Approval, ApprovalNote, ExpenseReport (with sub-properties: Approval, Creator, Date, ERTYPE, Meal, OtherDiners, Payment, Purpose, Total, Venue, RejectionNote, testsid), and testsid. The main workspace shows a 'SECTION ExpenseReports-Work-ExpenseReports • AddExpenseReport' with tabs for 'Layout', 'Parameters', 'Pages &amp; Classes', 'HTML', and 'History'. The 'Layout' tab is active, showing a 'Smart Layout (Single) - 1' with a 'New Expense Report' form. The form has a table with columns 'LABEL' and 'FIELD'. The rows are: Purpose (required), Creator (pxCreateOpName), Expense Report Type (required), Date (required), Venue/Provider, Meal, Other Diners/Attendees, Payment, and Total.





# Build Once, Deploy Everywhere

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# Pega Mobile Technology

- ▶ Model-driven
- ▶ Web App or Native App



Pega BPM



HTML5



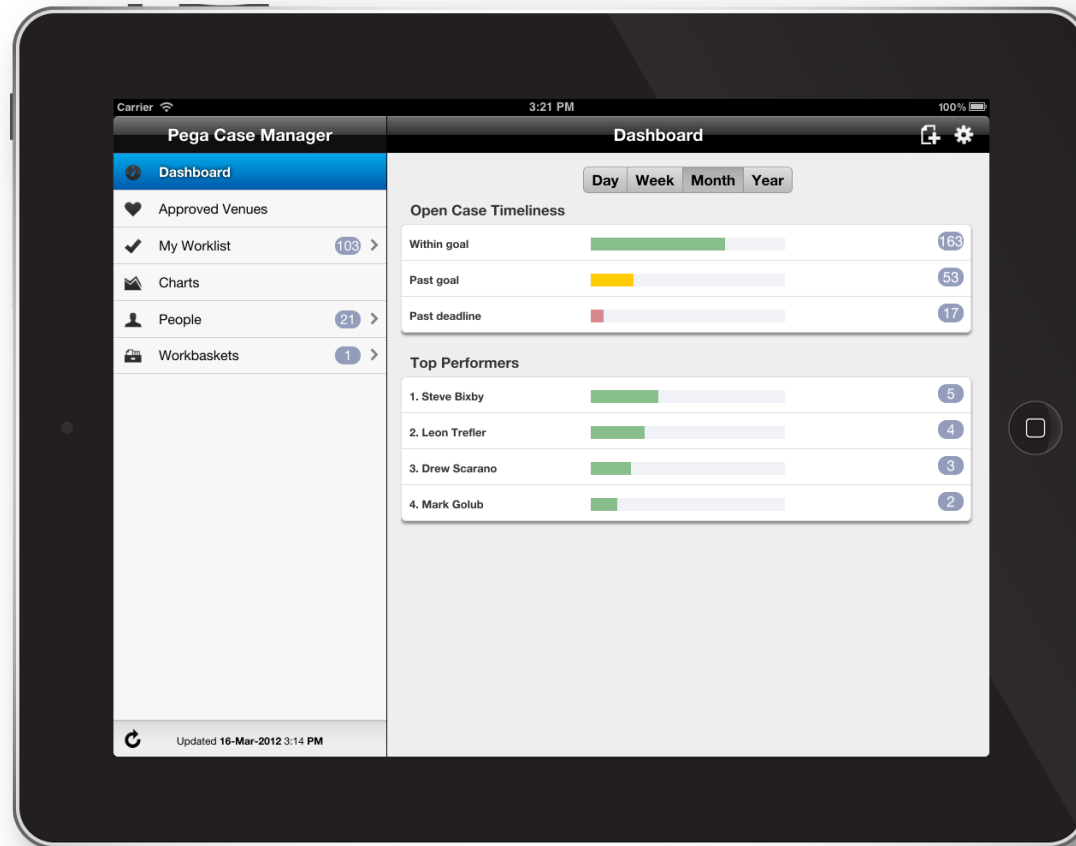
CSS3



- ▶ Cross platform and device
- ▶ Updates automatically available

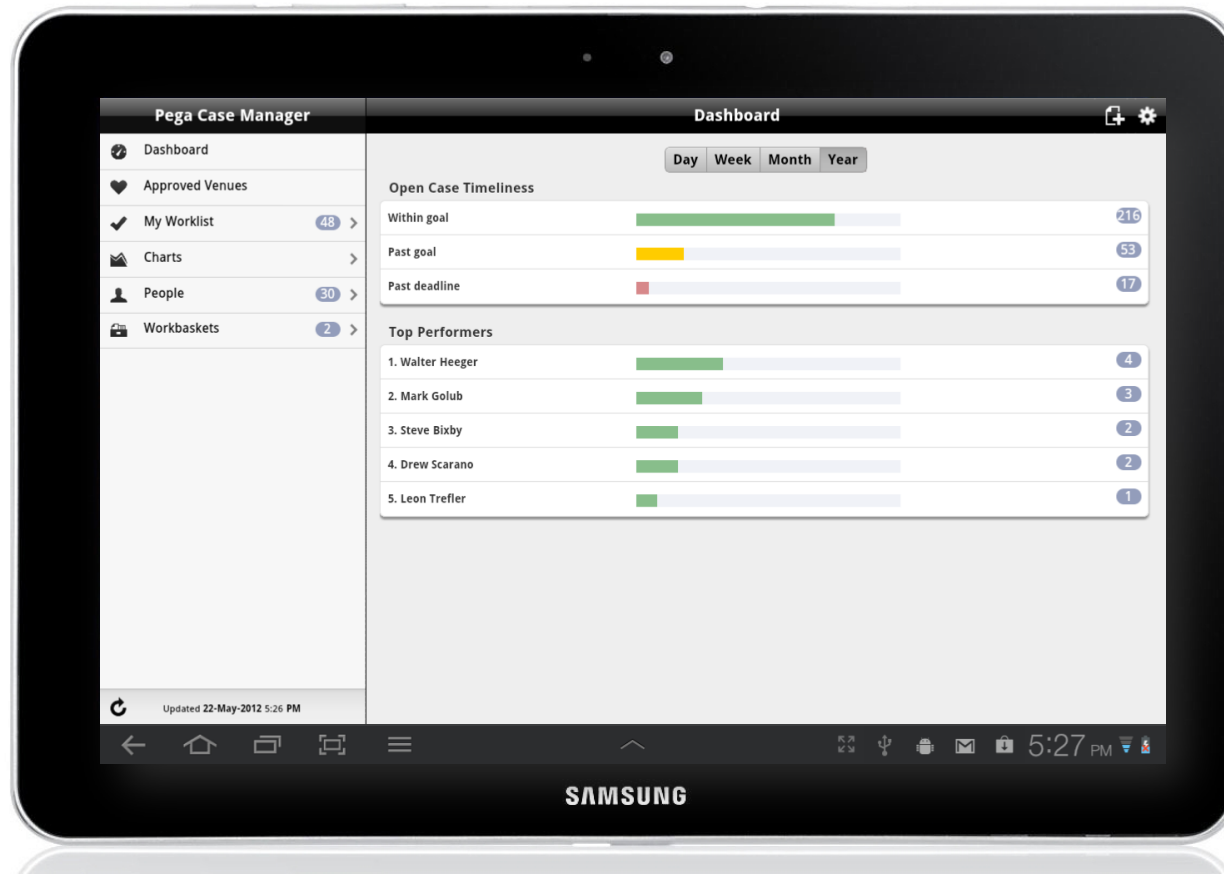
# Device and OS Agnostic

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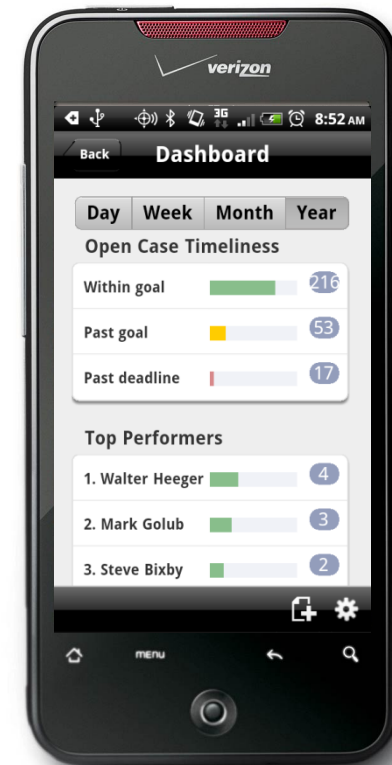
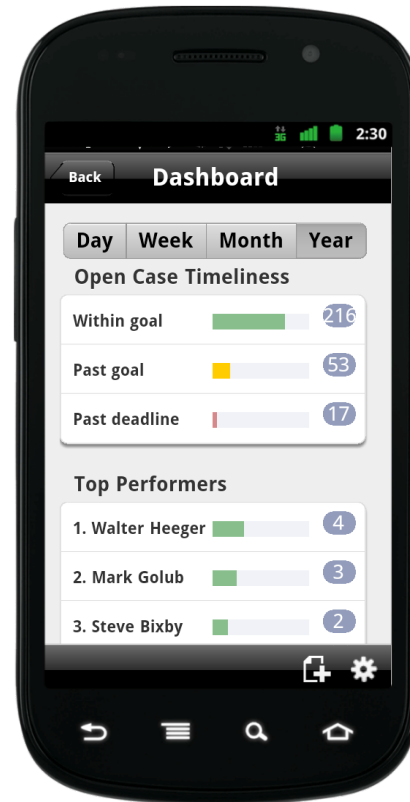
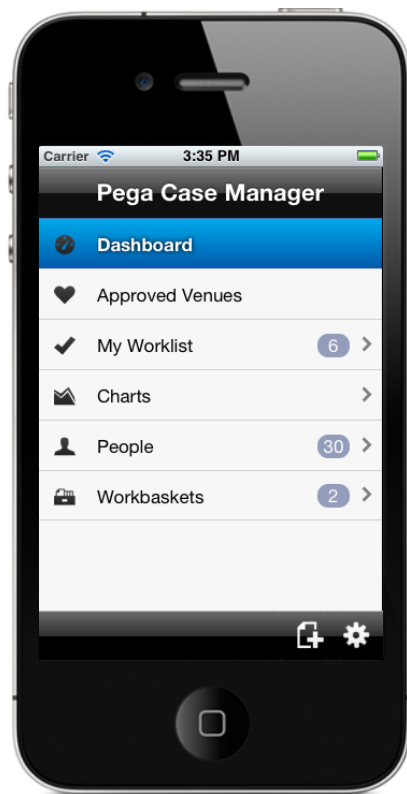
# Device and OS Agnostic

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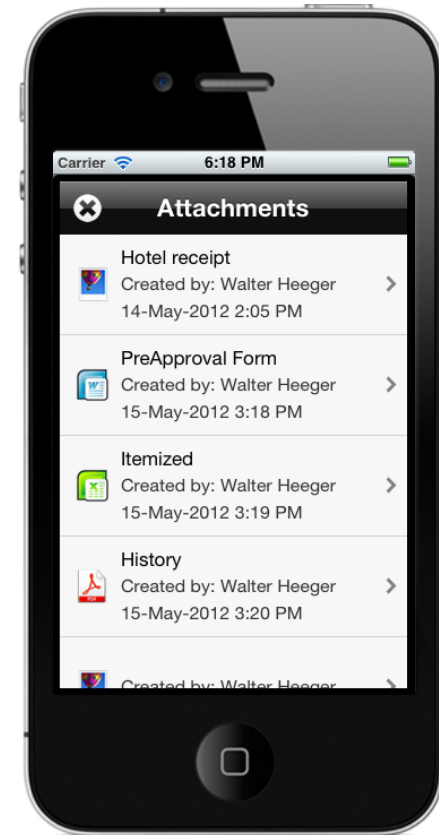
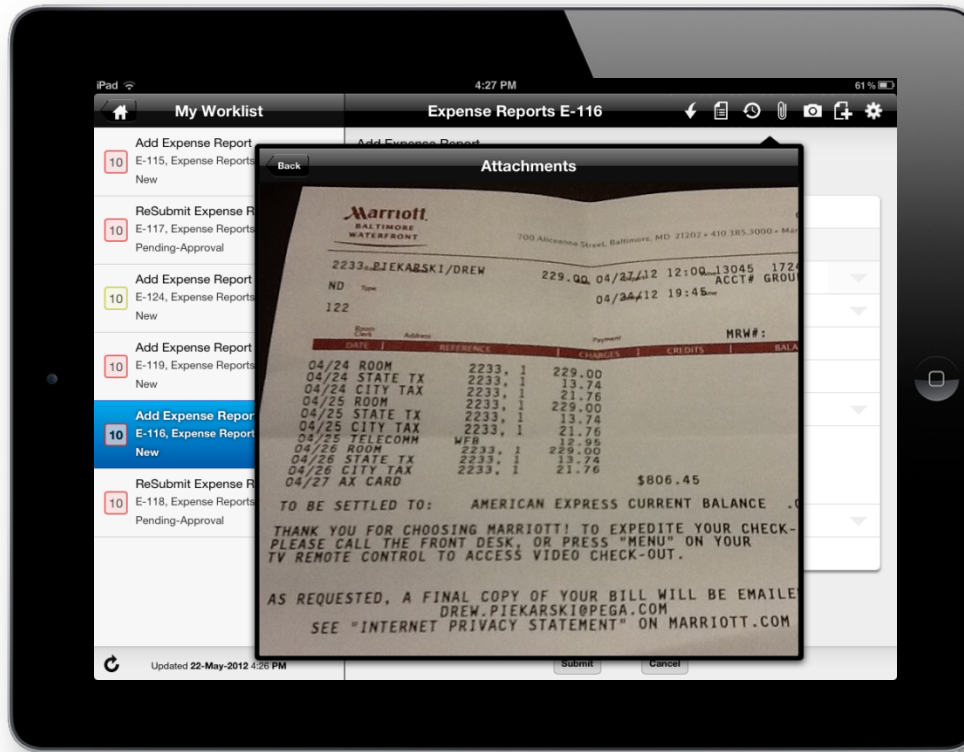
# Device and OS Agnostic

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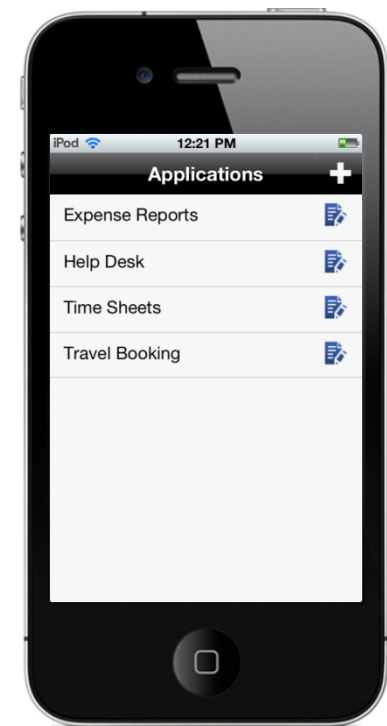
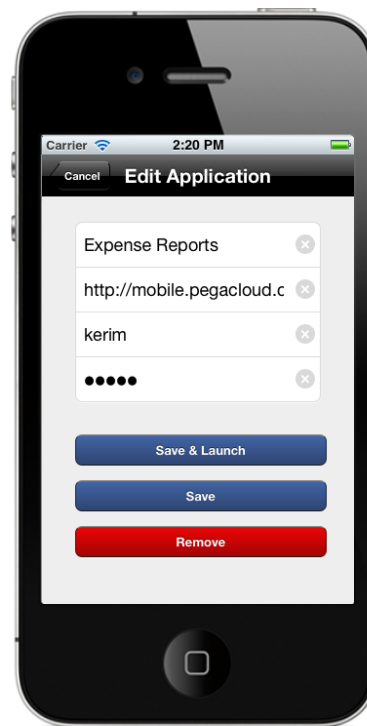
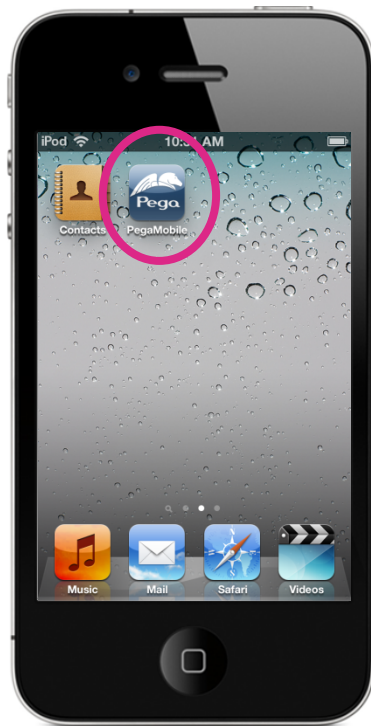
# Device and OS Agnostic

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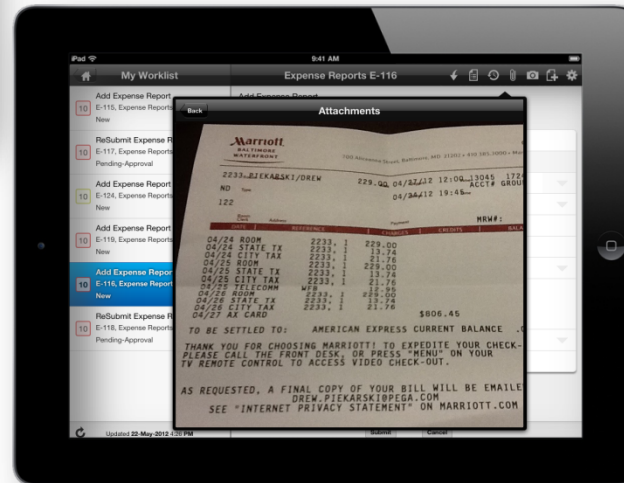
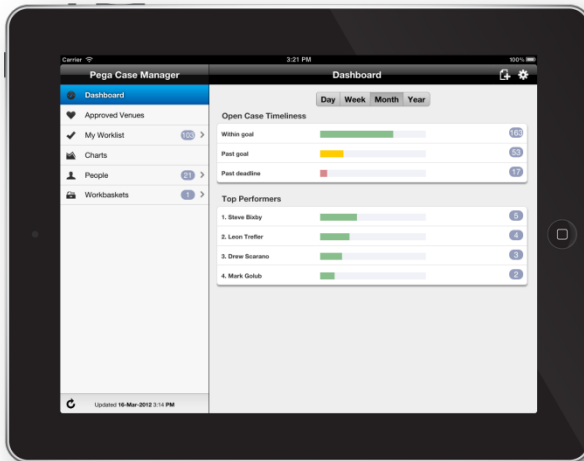
# Device and OS Agnostic

## ▶ Optional Pega Mobile Native App



# Rich, Adaptable Interface

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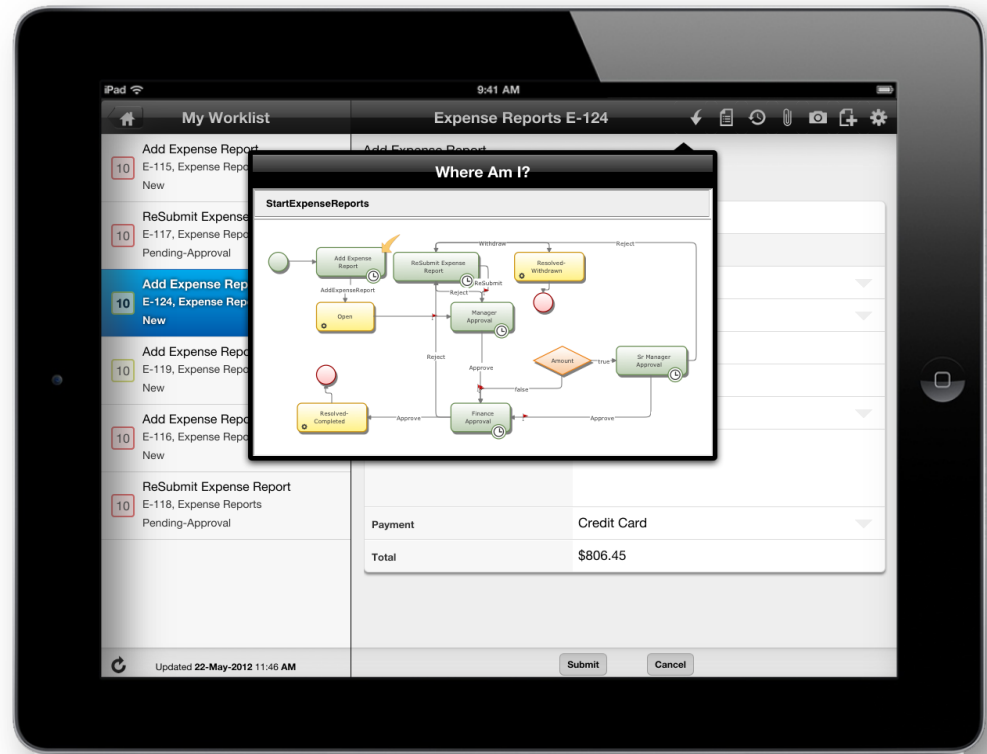
# Rich, Adaptable Interface

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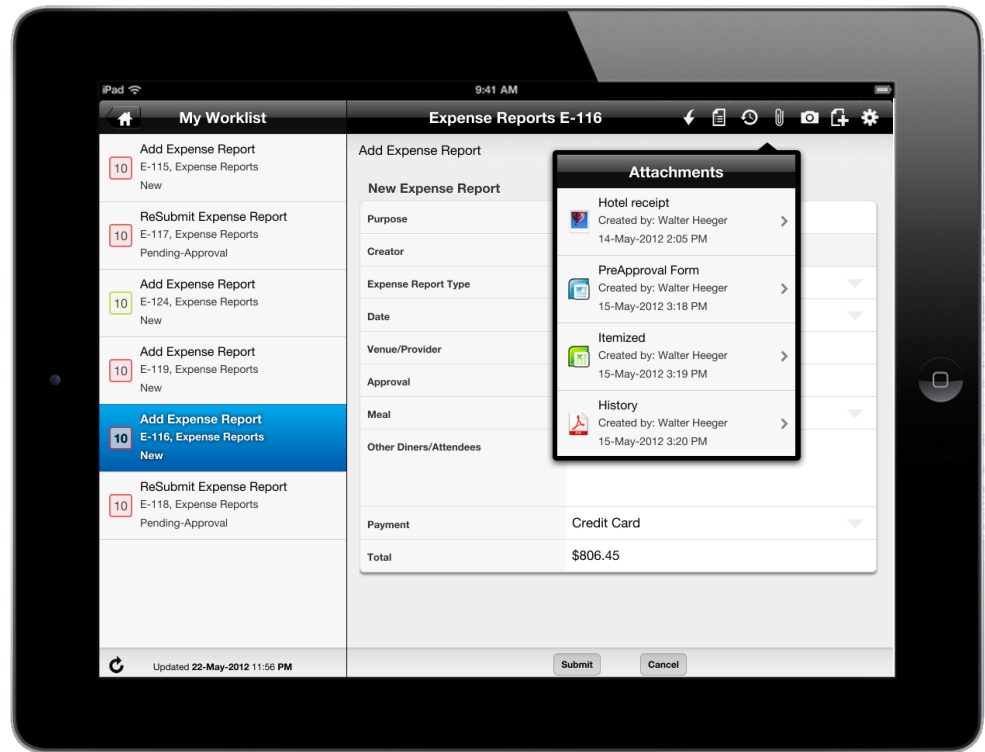
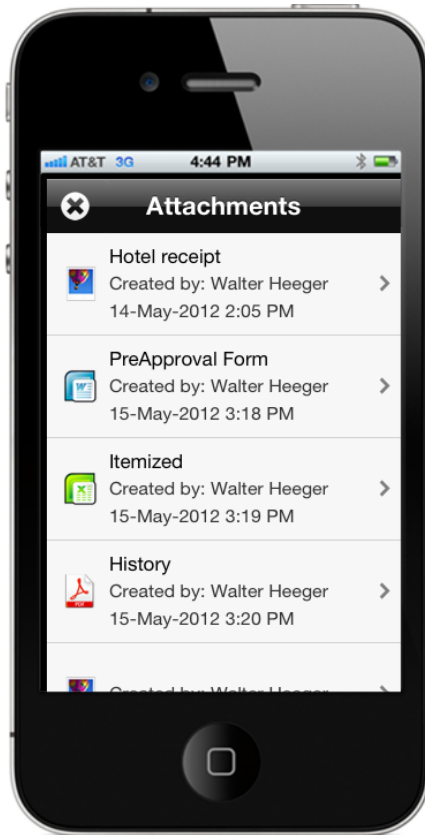
# Rich, Adaptable Interface

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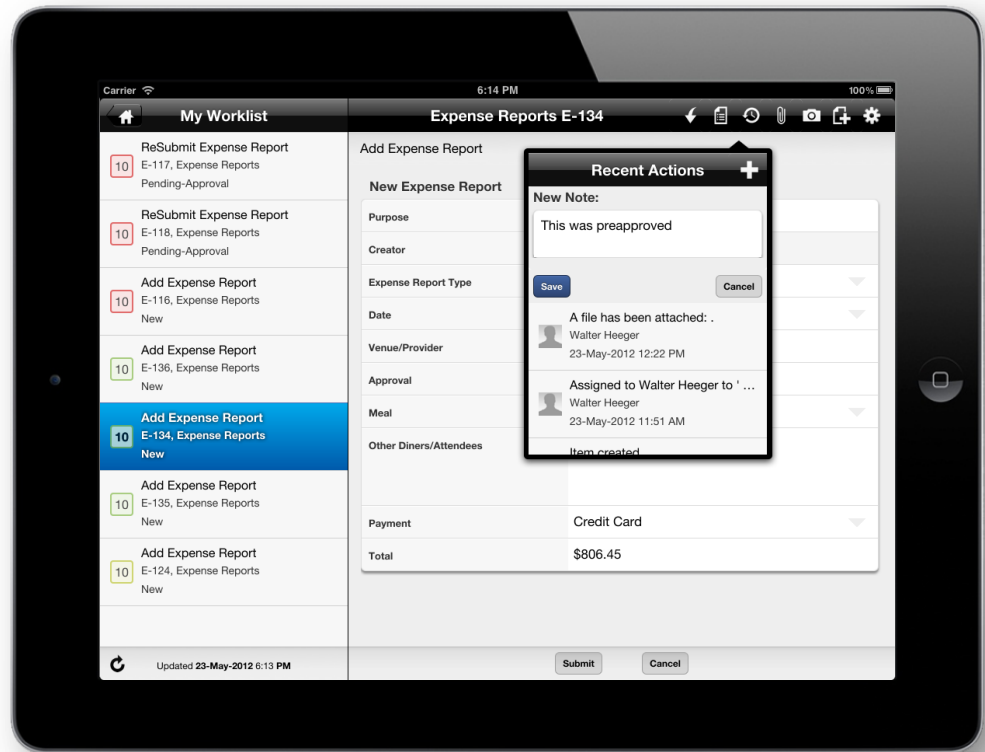
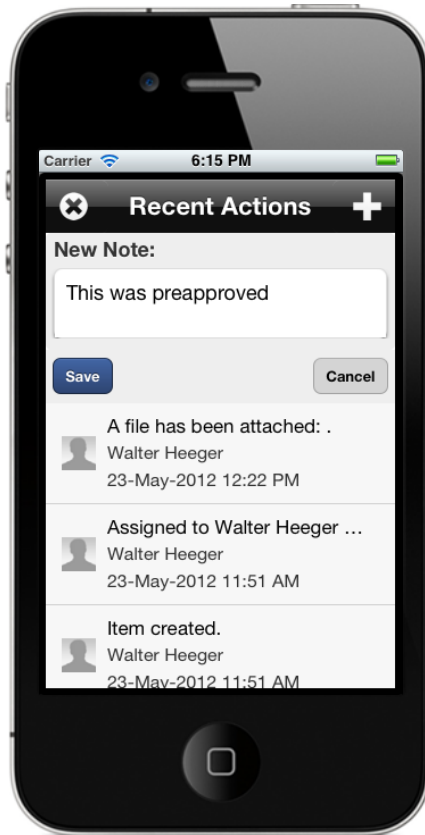
# Rich, Adaptable Interface

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# Rich, Adaptable Interface

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# Auto-Generated Mobile UI

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## ▶ Touch Ready Layouts

New Expense Report

LABEL	FIELD
Purpose *	
Creator	pxCreateOpName
Expense Report Type *	
Date *	<input type="checkbox"/>
Venue/Provider	
Meal	
Other Diners/Attendees	
Payment	
Total	

Single Smart

New Expense Report

Purpose *	
Creator	Steve Bixby
Expense Report Type *	Airfare
Date *	
Venue/Provider	
Meal	
Other Diners/Attendees	
Payment	Cash
Total	\$0.00

Tabbed

Vehicle Inspection

LABEL	FIELD
Customer	FullName
Vehicle	InsuredVehicle
Mileage	
Interior Condition	Outstanding
Exterior Condition	Outstanding
Aftermarket Accessories	
Appraised Value	

Vehicle Inspection

Customer	Steve Bixby
Vehicle	1959 Cadillac Eldorado
Mileage	
Interior Condition	Outstanding
Exterior Condition	Outstanding
Aftermarket Accessories	
Appraised Value	

Drivers

First Name	License Number	Traffic Accidents	Traffic Violations
Steve	D44889002	0	0
Kristen	D7739393	1	2

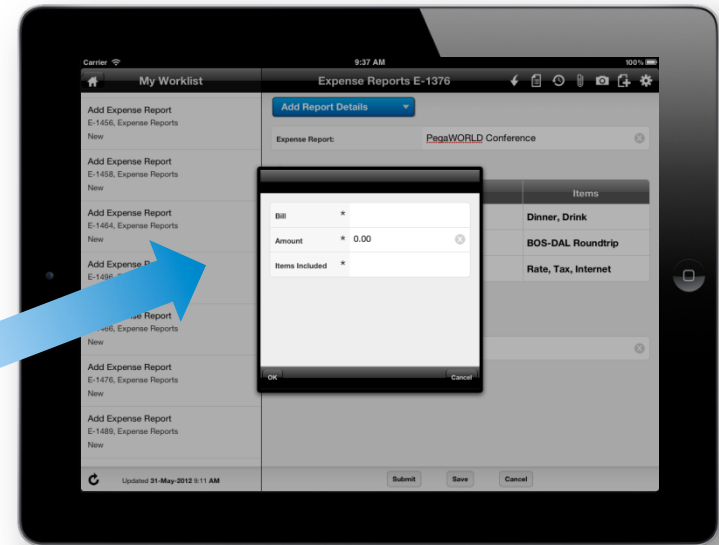
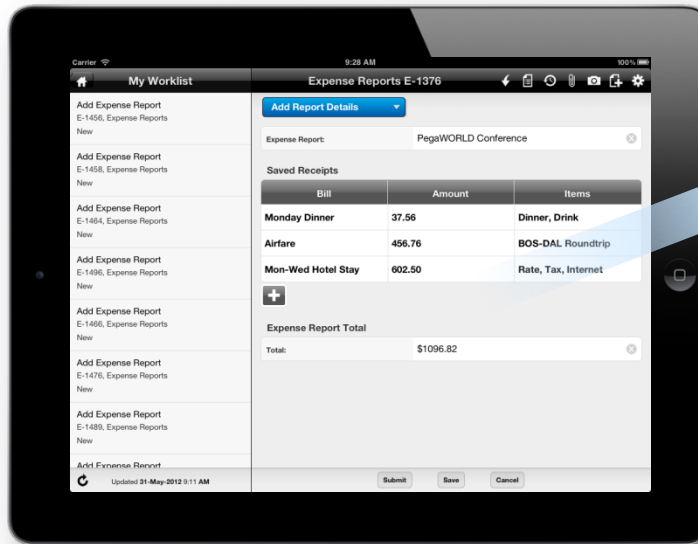
Swipe



# Auto-Generated Mobile UI



## ► Touch Ready Repeating Grids



# Auto-Generated Mobile UI



- ▶ Touch Ready Layouts and Controls
  - Text Input, Text Area, Checkbox, Currency

LABEL	FIELD	Cell Properties
First Name		Property: .FirstName
Last Name		Control: pxTextInput
Address		Behavior:
City		

LABEL	FIELD	Cell Properties
Public Transport	<input type="checkbox"/>	Property: .publictransport
Four Wheeler	<input type="checkbox"/>	Control: pxCheckbox
Two wheeler	<input type="checkbox"/>	Behavior:
Vehicle Plate No.		

LABEL	FIELD	Cell Properties
Admitted Date		Property: .CoPay
Room Number		Control: pxCurrency
CoPay		Behavior:

Carrier 10:04 AM

New Employee

First Na...  
Last Name  
Address  
City Cambridge

Previous Next Done

Q W E R T Y U I O P  
A S D F G H J K L  
Z X C V B N M

.123 space Go

Employee Transportation

Public Transport ✓  
Four Wheeler ✓  
Two wheeler ✓  
Vehicle Plate No.

Carrier 10:42 AM

Admitted...  
Room Nu...  
CoPay

Submit Cancel

Previous Next Done

1 2 3 4 5 6 7 8 9 0  
- / : ; ( ) \$ & @ ''  
#+= . , ? ! ' < >  
ABC space Go



# Auto-Generated Mobile UI



- ▶ Touch Ready Layouts and Controls
  - DateTime, PromptSelect, Dynamic Select, AutoComplete

Labels: Purpose, Creator, Expense Report Type, Date

Property	Control	Behavior
.ExpenseReport(1).Date	pxDateTime	

Labels: City, State, Zip

Property	Control	Behavior
.State	PromptSelect	

January 2012

S	M	T	W	TH	F	S
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Buttons: Cancel, Today

State: CA

ZIP

Administrative

Admitted Date

Room Number

Medical

Age

Height

Weight

ICD 9 Code

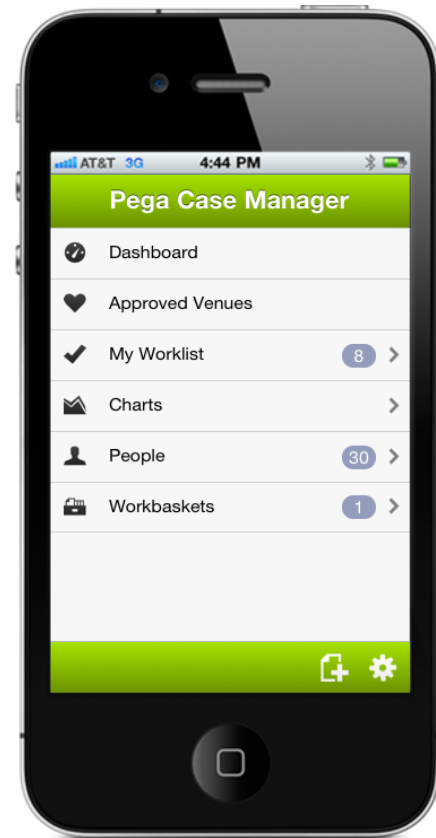
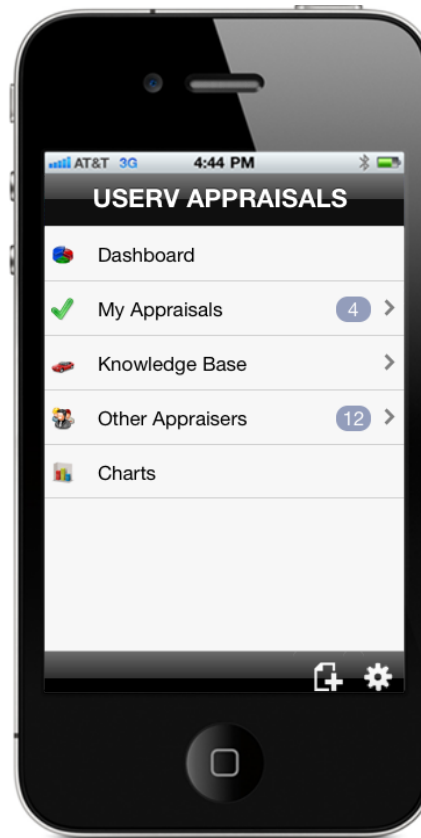
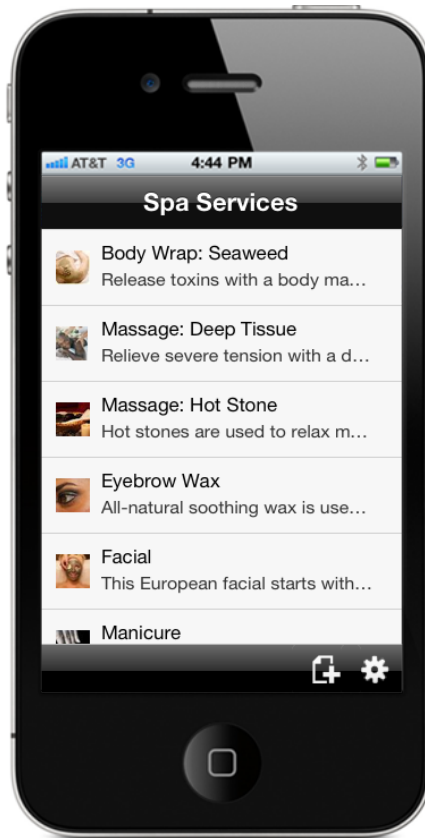
- AK
- AL
- AR
- AZ
- CA
- CO
- CT
- DC
- DE
- FL





# Easily Customizable

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# Easily Customizable

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# Demo



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# Pega Mobile

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- ▶ Build once, deploy everywhere
- ▶ Device and OS transparency
- ▶ Rich and adaptable interface



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# Questions & Answers



<http://pega.com/mobile>

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