

# 115-eT: Pivotal 5.9 Technology Foundations for Customizers and Administrators

## Overview

This online course, taught over 4 days in daily three-hour sessions, gives technical users of Pivotal products a complete overview of Pivotal architecture and technologies. Hands-on exercises allow the students to work with Pivotal technologies throughout the class.

## Audience

Customizers, Administrators, Power Users, Program Managers

## Prerequisites

None

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## Topics Covered

### Product Overview

- Describe Pivotal CRM.
- Describe Lifecycle Engine.
- Describe feature/functionality of core Lifecycle Engine products.
- Describe data synchronization (Pivotal SyncStream; synchronization with Personal Information Managers).
- Describe Pivotal Integration solutions.

### CMS Workflow

- Explain Relational Database fundamentals.
- Interpret Entity Relationship diagrams.
- Describe eRelationship workflow.
- Discuss automation features in the CMS.

### Workflow Automation

- Explain Pivotal Links.
- Identify Action-Enabled buttons.
- Define Business Rules.
- Define Agents.
- Explain client scripts.
- Define AppServer Rules.

### Power Tools

- Run queries.
- Verify query results.
- Create and edit queries.
- Save queries as static lists.
- Run reports.
- Create and edit reports.
- Generate LetterExpress documents.
- Create your own LetterExpress templates.
- Generate a LetterExpress run.

### Pivotal Resources

- Review the resources available to you.