

200-C: Pivotal 5.9 Toolkit Customization

Overview

This five-day classroom course teaches the skills and techniques needed to customize the Toolkit features common to the Windows Access and Active Access Interfaces. This course is offered in a mixed environment, encouraging students to use either the Active or Windows Access Interface to complete exercises.

Audience

Customizers and Administrators

Prerequisites

Required: Course [115-eT: Pivotal 5.9 Technology Foundations for Customizers and Administrators](#) and knowledge of relational databases.

Topics Covered

Database Design and eRelationship

- Describe the underlying structure of relational databases and the implications of that structure for eRelationship systems.
- Define the term 'database'.
- Use relational database terminology.

eRelationship Architecture

- Explain the roles of the three components of an eRelationship system.
- Describe the different eRelationship systems.
- Outline the advantage to the eRelationship architecture.
- Use two different methods to define eRelationship systems.

Managing the Customization Process

- Describe the phases of the customization process.
- Use the functions of the eRelationship Enterprise Manager that are pertinent to Customizers.
- Connect to and disconnect from a system.
- Backup and restore a system.
- Create a copy of a Master system to customize – an Offline system.
- Update the ED with table structure changes in the BM using Apply Customization Changes.
- Upgrade a Master system with customization changes that have been made in an Offline system.

Security - Permissions

- Establish security permission for objects in an eRelationship system.
- Create new eRelationship security groups.
- Assign permissions to eRelationship objects.
- Create new connection types.
- Add users to eRelationship security groups.

Data Dictionary

- Classify the different types of data that are stored in an eRelationship system.
- Define the term 'data type'.
- Create a new data type.
- Edit an existing data type.

Topics Covered, Cont'd.

Creating Tables

- Identify the structure and features of database tables in an eRelationship system.
- Create a new table.
- Create/modify the functionality of a table.
- Identify the six default fields.
- Determine when to create Regular, Choice and Combo fields.
- Define the term 'index'.
- Create indexes.
- Determine when an index will improve system performance.
- Understand how to set-up logging.

Creating eTab Functionality

- Create an eTab menu item – Table, URL and Parent.
- Create a simple list and form for the associated table.

Target Action Objects Elements

- Manage Action Object items in a Customization system, including the Target Action Object items created for an End User System.
- Explain the difference between End User Action Objects and System Action Objects.
- Create Target Action Objects in the Customization system.
- Test newly created System Action Object items in the Offline System.
- Manage Seagate Crystal Reports in an eRelationship system.

Advanced Query Writing

- Comprehend and use the query interface.
- Efficiently use subqueries to significantly increase the search capabilities of an eRelationship system.
- Define the term 'subquery'.
- Decide when Advanced Queries are necessary.
- Identify where custom SQL can be used.

Creating iTab Functionality

- Customize the iTab.
- Add In-Context Queries, URLs and Plug-ins.

Customize the SmartPortal

- Customize the Home Page.
- Add SmartPortal Categories.
- Add SmartPortal Content URLs, Plug-ins, Queries.
- Add Graphs.
- Customize the Logo.
- Add a logo to the login screen.
- Add a logo to the Homepage.
- Modify the Portal Banner.

Security - Filters

- Create view filters.
- Create sync filters.
- Determine how filters behave when a user is in multiple groups.

Pivotal Transporter

- Use and interpret the features of the Pivotal Transporter.
- Safely transport objects from one eRelationship system to another, either via a Transporter file or Send System.
- Interpret the information that the Transporter returns during and after an import.
- Work with the Business Module maintenance features of the Transporter.

Customizing Help

- Indicate how help is accessed.
- Specify which types of help are available.
- Specify which types of help can be customized.
- Create help files.
- Identify where to place the help files.

Pivotal Resources

- Review the resources available to you.