

## 310-C: Pivotal 5.9 Administration

### Overview

This five-day classroom course teaches the skills required to deploy and administer the Lifecycle Engine. It focuses on understanding, deploying, and administering the core components of the Lifecycle Engine, including how they integrate with Microsoft's BackOffice products, and how data is synchronized between systems. Students will work individually or in small teams to deploy a distributed Production Environment using the Lifecycle Engine products and Customer Management System, on a Microsoft 2003 platform, Exchange 2003 and SQL Server 2005.

### Audience

Administrators

### Prerequisites

**Required:** Course [115-eT: Pivotal 5.9 Technology Foundations for Customizers and Administrators](#), and work experience with Microsoft operating systems, Active Directory, SQL 2005 and network infrastructure.

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## Topics Covered

### Introduction to the CRM Suite

- Describe Pivotal CRM.
- Describe Lifecycle Engine components.
- Describe Pivotal Licensing.
- Explain the purpose and use of the different Pivotal environments.

### Planning for Deployment

- Identify hardware and software requirements for a Lifecycle Engine deployment.
- Identify the different Lifecycle Engine deployment scenarios.
- Identify versioning of all application and Customer Management Systems (CMS).

### Deploying a Production Environment

- Examine the components that make up a Pivotal system.
- Describe the process of setting up a Master, Offline and Customization system for both a production and a development environment.
- Describe the process of configuring Pivotal Licensing (With or without redundancy).

### Managing Pivotal Security

- Examine six connection types in Pivotal security.
- Identify security information storage location.
- Create/add users to Pivotal security groups.
- Explain impact of adding a user in multiple groups.
- Assign permissions to objects.
- Describe the difference between Sync and View filters.
- Create Sync and View filters.
- Describe delegate security.
- Secure Pivotal using Application Role security.

### Deploying LAN Clients

- Explain the function of the ANM.
- Set up the ANM.

### Topics Covered, Cont'd.

#### Installing the Lifecycle Server

- Explain the use and functionality of the Lifecycle Server.
- Install and configure the Lifecycle Server.
- Explain the use of the Lifecycle Server Customization Assistant.
- Explain the use of the SMTP Configuration Tool.

#### Deploying Active Access Users

- Describe the components of an Active Access install.
- Test the Active Access installation.
- Troubleshoot the Active Access installation.

#### The SyncStream

- Discuss the benefits of HTTP synchronization.
- Explain how the ANM and DSM work together.
- Explain how the DSM uses IIS (HTTP Message Server).
- Identify and explain various synchronization messages.
- Identify and explain various notification messages.

#### Deploying a Satellite System

- Deploy a satellite system from either a main or a satellite system.

#### Deploying a Mobile System

- Describe the benefits and considerations of Mobile systems.
- Identify the steps to deploy a Mobile system.
- Identify the components of mobile synchronization administration.

#### Administering the Production Environment

- Explain the eRelationship Enterprise Manager process.
- Troubleshooting Pivotal Licensing.
- Explain the Query Analyzer functionality.
- Explain the DSM Watcher functionality.

- Explain the System Tables functionality.
- Explain the eRelationship Logs functionality.
- Perform Security Context Changes.

#### Troubleshooting the SyncStream

- Explain the purpose and structure of the SyncStream database.
- Find and reduce data rejections.
- Explain the Repair Synchronization process.
- Explain the Audit Synchronization process and options.
- Explain and perform code updates to replica systems.
- Plan for disaster.
- Explain Data Synchronization Diagnostic utility.

#### E-mail Management System

- Describe the workflow.
- Install and configure the EMS.
- Define monitored inbound email addresses and systems.

#### Outlook Synchronization Manager

- Install and configure OSM
- Understand the OSM process and functionality

#### Pivotal Resources

- Review the resources available to you.