

430-C: Pivotal 5.9 eService/ePartner Application Customization

Overview

This five-day classroom course teaches the skills and techniques required to customize the ePartner/eService applications and the Lifecycle Engine Application Server, including defining transition points, coding functionality in AppServer Rules, delegating to AppServer Rules, and handling errors. Through hands-on exercises, students will install the Lifecycle Server and ePartner/eService, configure security, customize the business module and active forms, and customize the ePartner/eService interface and online help.

Audience

Customizers/Programmers

Prerequisites

Required: Course **200-C: Pivotal 5.9 Toolkit Customization**. Experience creating a website using ASP, HTML, and JavaScript, some theoretical and practical knowledge of XML and XSL, and experience coding with VB are also required.

Recommended: **Course 204-eT: Pivotal 5.9 Toolkit Customization – Active Access Interface**

Topics Covered

Partner & Customer Management

- ePartner positioning & interface.
- Pivotal partner workflow.
- eService positioning & interface.
- Pivotal customer workflow.

Resources and Terminology

- Describe supporting materials and our terminology.
- Explain how to effectively search through Pivotal documentation.

Architecture & Security

- Install Lifecycle Server.
- Install and configure ePartner or eService.
- Install source code and Customization Wizard.
- Identify levels of security within an implementation.
- Create Pivotal security groups.

Customizing the Business Module

- Customize the Business Module.
- Identify business object properties specific to ePartner / eService.
- Explain URI command elements.
- Identify active form elements and their properties that are specific to ePartner / eService.

Customizing the User Interface

- Explain how PartnerHub is coded.
- Customize the look & feel using CSS, ASP, SXL, XML, JS.

Topics Covered, Cont'd.

Customizing the Workflow

- Explain data flow and transition points.
- Describe the coding environment for AppServer Rules.
- Explore out-of-the-box AppServer Rules.
- Look-up the Lifecycle Server APIs available for use and locate code examples.
- Create new workflow functionality.
- Use Pivotal functions.
- Modify existing workflow functionality.
- Employ error handling in AppServer Rules.

Customizing Help

- Help systems included with ePartner and eService.
- How to modify help files according to your requirements.
- Where to find the source help files.

Putting it All Together

- Customize the UI of ePartner or eService.
- Customize the workflow of ePartner or eService.
- Incorporate a DLL into the com_objects table in the BM.

Pivotal Resources

- Review the resources available to you.