

530: Pivotal 5.9 Active Access Application Customization Course

Audience: Pivotal CRM Application Customizers/ Developers.

Duration: 5 days

Location: CDC Software training locations (Atlanta or Vancouver) or on Customer's premises (onsite).

Price: \$3000 per person for public classes, \$15,000 on customer's premises

Prerequisites:

- **200: Pivotal 5.9 Toolkit Customization** (or equivalent experience)
- **204eT: Pivotal 5.9 Toolkit Customization– Active Access Interface** (or equivalent experience)
- Knowledge of VB/VBScript syntax is required. Knowledge of C# syntax is helpful

Description:

The 530: Pivotal 5.9 Active Access Application Customization course is a comprehensive class for developers interested in customizing the Pivotal CRM application business logic. Each student receives a comprehensive Participant Guide that includes all topics covered by the instructor and exercises that build on concepts taught in class. Students will learn about the Pivotal APIs and advanced customization techniques such as: writing client-side and server-side scripts, defining transition points, delegating to AppServer Rules, debugging code and handling errors. Through hands-on exercises, students will customize the application business logic with Client Scripts and AppServer Rules.

Note: This course does not cover Pivotal Windows Client customization.

Course Agenda

Day 1: Set up the Development Project

- Review major Toolkit customization techniques, applicable to the Active Access
- Describe Lifecycle Engine and Active Access architecture
- Describe Active Access data flow
- Configure Pivotal software products necessary for the Development Environment
- Use Visual InterDev or Visual Studio 2005 to debug client-side code
- Identify libraries used in client and server scripts
- Locate code examples

Day 2: Client Scripts

- Describe naming conventions for the Client Scripts
- Link Client Scripts to the Active Forms and their controls
- Create and use global variables and methods
- Create custom messages and dialogs
- Implement event hook scripts for buttons and fields
- Customize toolbar buttons
- Change form field properties dynamically. Hide, disable and make fields required
- Access and update primary and secondary recordsets

Day 3: Advanced Client Scripts

- Add Transition Points to the form script
- Cancel deletion of the record
- Use objects with “scriptable” security permissions
- Open modal forms
- Pass data between forms with Transition Point Parameter Array
- Identify the Platform Notification Events
- Override SmartPortal behavior
- Run a Report from script
- Pass data to the server
- Access Language Dictionary with scripts

Day 4: COM + AppServer Rules

- Outline how data is passed between the Lifecycle Server and client
- Review common out-of-the-box classes and interfaces
- Create a Visual Basic project for AppServer Rule
- Create a custom AppServer Rule with common functionality
- Link AppServer Rule to the form
- Debug AppServer Rules in Visual Studio 6
- Use Lifecycle Customization Assistant to register and import an AppServer Rule
- Code pre- and post-processing functionality in AppServer Rules
- Fill in the default fields on the form with Transition Point Parameter Array
- Execute AppServer Rule methods from client
- Access database records from the AppServer Rule. Cascade delete records.
- Delegate AppServer Rule
- Handle errors

Day 5: .NET AppServer Rules and Additional Topics

- Create C# project for AppServer Rules
- Add references to Pivotal Foundation and Interop Libraries
- Identify code constructs in .NET AppServer Rule
- Debug .NET AppServer Rule
- Use LCS Customization Assistant to connect .NET AppServer Rule to the Active Form
- Build a simple .NET AppServer Rule
- Cascade delete record - .NET option
- Identify user's security group
- Invoke methods of COM + AppServer Rule from .NET AppServer Rule
- Create a Scheduled Script
- Describe a TreeView control
- Reinforce acquired knowledge with additional exercises.