

Prolog Converge Advanced Notifications & Web Views Training



Who Should Take This Course

Trimble employees, partners and clients who need a comprehensive understanding of advanced notifications, web configuration and design for Prolog Converge. Participants will learn how to create custom notifications, design notification content, and deploy and troubleshoot notifications. They will also learn how to create new Web Views, add UDF's, modify the Project and Portfolio Summaries, and apply advanced filters. This class is ideal for those who will be making decisions regarding implementation and configuration of Prolog Converge.

Prerequisites:

In order to maximize your learning experience the following course prerequisites must be met prior to attending this course.

- An understanding of the AEC industry
- Knowledge of your company's business processes and procedures
- Successfully completed Prolog Converge Administration course
- Experience using and administering Prolog Manager and Prolog Connect
- Basic understanding of the Prolog Manager SQL database table structure
- Ability to create basic SQL query statements
- Basic experience with writing reports

What You Will Learn

This class will provide you with a in-depth look at creating and maintaining all types of Prolog Converge notifications, notification best practices, and tips and tricks for troubleshooting. Upon completion of this course, you will be able to consult on and create, deploy, and troubleshoot all types of Prolog Converge notifications.

Knowledge to Leverage	<ul style="list-style-type: none"> ✓ Ability to define notification rules ✓ Ability to create new notification report content ✓ Ability to configure distribution lists and contacts for notifications ✓ Understanding when to apply different notification types ✓ Ability to setup User-Triggered notifications ✓ Ability to setup Monitor Data Change notifications ✓ Ability to Publish Reports on a schedule ✓ Ability to add UDF's to Web Views ✓ Ability to modify the Project and Portfolio Summary logic ✓ Ability to add record types to the Project and Portfolio Summaries
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	<ul style="list-style-type: none"> ✓ Ability to create custom Insight Views ✓ Ability to create custom Portfolio Views ✓ Ability to create custom Project Views
Tools to Use	<ul style="list-style-type: none"> ✓ Prolog Converge Administration Tool ✓ Component One (C1) Report Designer ✓ SQL Management Studio

Topic Descriptions

Introduction

The course introduction covers the course agenda and timelines, learning objectives, prerequisites, and training facilities layout. You will also be introduced to other available related training courses to leverage the new knowledge and expand your Prolog Converge expertise.

Prolog Converge Notification System Overview

This section covers the notification system overview. Users will get a close up look at the Prolog Converge Administration Client, the available configuration options, and the types of notifications.

Prolog Converge Administration Client Overview

In this section participants will gain an understanding of the types of notifications, publishing changes, and navigating in the Prolog Converge Administration Client. The unit will also discuss the necessary system maintenance.

Prolog Converge Administration Overview

Overview

In the Administration Overview unit, you will learn about the business value created through custom Prolog Converge notifications.

Notification Capabilities

In this unit, you will take a closer look at the configuration options for user-triggered, scheduled, and real-time notifications. You will gain a clearer understanding of the differences between notification types. The unit will also focus on notification content and contacts, including distribution lists.

Notification Preference Module

This section covers the configuration options in the Notification Preferences module. You will learn to set defaults for scheduled and real-time notifications, among other settings.

User-Triggered Notification Maintenance

Overview

In the User-Triggered notification unit, you will learn about the business value created through User-Triggered notifications.

Using the User-Triggered Notification Module

This in-depth session covers User-Triggered notifications. You will learn to set up a new notification, configure a report content, setup security, and add recipients. The session will also take a look at use of User-Triggered notifications in environments with multiple portfolios.

Exercise: Review an Existing User-Triggered Notification

In this unit, users will get hands-on experience with User-Triggered notifications. Each user is expected to review the rules and objectives of an existing User-Triggered notification and execute the notification.

Working with C1 Reports

Overview

In the C1 Reports unit, you will learn about the business value created through the C1 reports.

Using the C1 Report Designer

This in-depth session covers the C1 report designers concepts including layout, toolbar features, report elements, Prolog Converge integration, and advanced features. You will learn how to build notification report content from scratch and configure it within Prolog Converge.

Exercise: Create New User-Triggered Notification

In this unit, users will get hands-on experience creating a new C1 report. You will learn to access the report designer, set up data sources, configure the layout and elements of the report, and execute the content in a notification.

Monitor Data Change Notification Maintenance

Overview

In the Administration Overview unit, you will learn about the business value created through Monitor Data Change notifications.

Using Monitor Data Change Notification Module

This in-depth session covers monitor data change notifications. You will learn to set up a new notification, configure a report content, design rules and criteria, and add recipients. The session will also take a look at using monitor data change notifications in environments with multiple portfolios.

Exercise: Create New Monitor Data Change Notification

In this portion of the course, users will get hands-on experience creating a new monitor data change notification. You will set up a new data source, criteria, content, recipients, and execute and test your new notification.

Published Reports Maintenance**Overview**

In the Published Reports Maintenance unit, you'll learn about the business value created through Published Reports.

Using Monitor Data Change Notification Module

This in-depth session covers all aspects of the Published Reports module. You will learn to set up a new published report, configure report content, set up schedules, and add recipients.

Exercise: Create New Published Report

In this session, users will get hands-on experience creating a new published report. You will setup the report settings, recipients, and schedules. You will also design a new report content using the C1 Report Designer.

View Types**Overview**

In the View Types unit, you will learn about the business value created through different Web View Types.

Page Types

This in-depth session covers Page Types available in the Portfolio, Project, and Insight areas. All available types in the application will be reviewed and discussed.

Data Type & Sub Type

This in-depth session covers Data and Sub Types available in the Portfolio, Project, and Insight areas. All available types in the application will be reviewed and discussed.

Templates

This in-depth session covers Templates and their usage in Prolog Converge.

Exercise: Insight View

In this unit, users will get hands-on experience creating a new Insight View, configuring the attributes and columns, and reviewing the view in the Web Client.

Exercise: Drilldown Field

In this unit, users will get hands-on experience creating a new Drilldown field in an existing view and will review added drilldown capability in the Web Client.

SQL Views & Functions for Prolog Converge

Overview

In the SQL Views and Functions unit, you will learn about the business value created through customizing SQL Views and Functions to create Web Client Views.

Data Source

This in-depth session covers the Data Source concepts in the Web configuration record. Users will review Value Sources and Server records and understand the appropriate use of each configuration option.

Creating Custom SQL Views and Functions

In this unit, users will review SQL concepts for Views and Functions for the use with Prolog Converge. This unit will cover special fields in the system fields, typical scenarios for using each one, and configuration options.

Adding UDF's

In this unit, users will learn how to add different types of User-Defined Fields to Prolog Converge system views and functions as well as configure the new fields as part of the Web columns.

Exercise: Adding UDF's

In this exercise, users will update an existing View Definition to include a UDF. The user will go through the series of steps, including adding the UDF to Prolog Manager.

View Filters

Overview

In the View Filters unit, you will learn about the business value created through adding custom filters to Web View Definition configurations.

Filtering Concepts

This in-depth session covers the filters for Web Views, best practices, and configuration options.

Filter Field

In this unit, users will review the filter field for Web Views and discuss the best practices for applying filters.

System-Set Parameters

In this unit, users will review the System-Set parameters tab on Web Views and discuss the best practices for applying filters.

Exercise: Filter Field

In this exercise, users will create a new filtered View using the filter field.

Exercise: System-Set Parameters

In this exercise, users will create a new filtered View using the System-Set parameters tab.

Column Conditions

Overview

In the Column Conditions unit, you will learn about the business value created through conditional highlighting of KPI's and important records.

Column Condition Concepts

This in-depth session covers the application and typical use of Column Conditions to highlight KPI's and visually identify important records.

Exercise: Highlight Rows

In this exercise, users will configure column conditions to visually highlight important RFI records.

Exercise: Display KPI's

In this exercise, users will configure a simple KPI using column conditions.

Project and Portfolio Summary

Overview

In the Project and Portfolio Summary unit, you will learn about the business value created through modifying the Project and Portfolio Summaries.

Summary View Design

This in-depth session covers the design of the SQL View used to create the Summaries. This unit will discuss all the key fields and appropriate configuration to modify the Project and Portfolio Summaries.

Exercise: Add Issues to Summary

In this exercise, users will modify the SQL View to add Issues as a record type on the Project and Portfolio Summary.

Agenda

This class is a combination of lecture, demonstration, hands-on practice, and discussion of how features could be utilized by your customers. Each class day includes breaks and lunch, resulting in a daily in-class time of approximately 7 hours.

<p>Day One 8:30-4:30</p>	<ul style="list-style-type: none"> I. Introductions and Class Objectives II. Prolog Converge Notifications Overview <ul style="list-style-type: none"> A. Notification System Overview B. Notifications Concepts <ul style="list-style-type: none"> i. Data Source ii. Content iii. Contacts iv. Trigger Types III. Communication Solutions Exercise <ul style="list-style-type: none"> A. Notification Preferences B. Publishing Changes IV. User-Triggered Notifications – continued <ul style="list-style-type: none"> A. User-Triggered Notifications Concepts B. General Tab C. Security Tab D. Content Tab E. Contacts Tab V. Working with C1 Reports <ul style="list-style-type: none"> A. C1 Report Designer Concepts B. C1 Report Designer Layout C. Toolbar Features D. Report Elements E. Subreports F. Report’s Tag G. Picture’s Tag
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<p>Day Two 8:30-4:30</p>	<ul style="list-style-type: none"> I. Working with C1 Reports - continued <ul style="list-style-type: none"> A. Running Reports B. Correcting Common Errors II. Exercise: Creating New User Triggered Notification with C1 Report Content III. Monitor Data Change Notifications <ul style="list-style-type: none"> A. Monitor Data Change Notifications Concepts B. General Tab C. Content Tab D. Contacts Tab E. Criteria Tab F. Send Criteria Tab G. Grouping Tab H. Schedule Tab IV. Monitor Data Change Notifications - continued <ul style="list-style-type: none"> A. Notifications Scenarios – build your own! V. Published Reports <ul style="list-style-type: none"> A. Published Reports Concepts B. General Tab C. Content Tab D. Contacts Tab
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<p>Day Three 8:30-4:30</p>	<ul style="list-style-type: none"> I. Web Views Objectives II. Foundations Review <ul style="list-style-type: none"> A. Review Quiz B. Foundations Review & Discussion III. View Types <ul style="list-style-type: none"> A. Page Types B. Date Type & Sub Type C. Templates D. Exercise: Insight View E. Exercise: Drilldown Field IV. SQL Views and Functions for Prolog Converge <ul style="list-style-type: none"> A. Data Source B. Creating Custom SQL Views and Functions C. Adding UDFs D. Exercise on UDFs V. View Filters <ul style="list-style-type: none"> A. Filtering Concepts B. Filter Field C. System-set Parameters D. Exercise: Filter Field E. Exercise: System-set Parameters VI. Column Conditions <ul style="list-style-type: none"> A. Column Condition Concepts B. Exercise: Highlight Rows C. Exercise: Display KPIs VII. Projects and Portfolio Summary <ul style="list-style-type: none"> A. Summary View Design B. Exercise: Add Issues to Summary III. Putting it All Together
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