Prolog Administration Training

Who Should Take This Course

Trimble Buildings employees, partners and clients who need a comprehensive understanding of Prolog setup and configuration capabilities. Participants will learn how to setup Prolog databases, enable multiple portfolios, configure security, customize web views, and utilize notifications to successfully deploy the Prolog solution. This class is ideal for those who will be making decisions regarding implementation and configuration of Prolog. The intended audience includes:

- Prolog Administrators
- Prolog Implementation Consultants
- Prolog Technical Support Specialists

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
- Experience using Prolog
- Basic understanding of the Prolog SQL database table structure

What You Will Learn

This course will provide you with a solid understanding of how to configure Prolog to fit business requirements. You will utilize administrative tools necessary to successfully install, configure and maintain Prolog.

Objectives

After completing this course, participants will be able to:

- ✓ Setup project templates to standardize the project startup process
- ✓ Configure security and provide users access to control who and how can they interact with project information
- ✓ Import standard project data to gain efficiencies
- ✓ Configure usability preferences at portfolio, project or user level to streamline the workflow processes
- ✓ Create User Defined Fields (UDFs) to capture custom business requirements
- ✓ Create Word Processing templates for standard project communications to gain increase efficiency and accountability on the project
- ✓ Design Queries to retrieve pertinent project data for increased project controls
- ✓ Provide meaningful reporting to project members for effective decision making
- ✓ Setup additional portfolios and support the project startup process

- ✓ Configure security specific to Prolog Converge User Interface and provide users access to control who and how can they interact with project information
- ✓ Utilize the powerful Prolog notifications to increase project collaboration
- ✓ Modify Web Views to retrieve and highlight pertinent project data for increased project controls
- ✓ Provide meaningful reporting to project members for effective decision making
- ✓ Configure Prolog Workflow to increase project team productivity
- ✓ Configure Prolog Mail Capture to provide efficient email tracking
- ✓ Configure Prolog File Capture to streamline document storing and management

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 Admin expertise.

Prolog Solution Overview

This section covers the various applications which are part of the Prolog Solution and how can assist organizations in realizing their long term technology goals.

Prolog Manager Database Administration

Portfolio Manager

In this section, you will learn where to view your company's portfolio of projects and how to create projects.

Database Strategies

Learn about the pros and cons of managing project with a Single or Multiple Database strategy.

Database Maintenance

In this section, you will learn how to create, archive, compact, connect, back up and restore databases with Prolog Administrator

Prolog Manager Setup and Configuration

Data Import and Export

In this section, learn how to save time by importing data into Prolog Manager for quick project start up

Preferences

In this section, learn how to customizing the User Interface, Project Specific and Portfolio Specific Options

Nomenclature

Learn how to create User Defined Fields to accommodate your company's Portfolio requirements. Customization Manager allows you to add fields onto an additional tab in the Data Entry Form, or add additional columns into the grid sections of a Data Entry Form.

Word Processing

Templates

In the section, you will learn how to create new word merge templates for creating new documents based on company standards

Dunning Letters

Learn how to use a Word Processing Wizard to quickly create multiple documents to various addresses based on project records

Queries and Reports

System Queries

Learn how to use the dozens of pre-built queries that come with Prolog Manager

Auto Alerts

In this section, you will learn how to easily generate automatic alerts to help you manage outstanding records.

Report Modifications

Learn how to use Prolog Manager to configure reports for your company

Security Manager

User Accounts

In this section, you will learn how to create user accounts and assign security rights to security groups in Prolog Manager.

Prolog Converge Admin Tool Overview

Overview

In the Overview section, you will learn about the business value created through successful administration of the Prolog Converge application.

Modules and Purpose

In this unit, you will take a closer look at the Admin Tool Modules and how they are used to set up system requirements, web views and custom notifications. These modules support end-users in gaining maximum value from their Converge web interface.

Prolog Converge Architecture and Terms

In this section participants will gain an understanding of the components typically installed on a Converge Web Server, MSQL Server, File Server and Desktop PS's. You will also be given a glossary index of commonly used Converge terms.

System

Overview

In this unit, you will learn about the business value created through the System module.

New Database (Portfolio) Setup

This in-depth session covers the necessary steps of setting up a portfolio, including restoring a Prolog SQL Database in Prolog Manager, adding a database to Prolog Connect, and adding a database to Prolog Converge.

Database Servers and Value Sources

This in-depth session covers the necessary steps of setting up Database Servers and Value Sources, providing for enhanced data filtering from the accessible SQL tables.

E-Mail Server, Index Server, and Notification Server

This in-depth session covers how to establish a connection between your email server and the Prolog Manager database. It also covers recommendations and how to set up an Index Server to provide users key word search capabilities on their stored project files. Also included in this session are steps on setting up a Notification Server to allow users to receive email notifications on actions they are required to perform on the project.

DMS Preference and Quick Upload Folders Configuration

This in-depth session covers how to define the storage location for the Prolog Converge File Management System (FMS). It also covers how to set up the Quick Upload option to allow for consistency in file upload and storage.

Logos

In this unit, participants will learn how to add or modify logos being used in the C1 Reports or Notifications.

Lookup Lists

In this unit, participants will learn how to use images in their column view settings. These images act as visual indicators that help enhance the end-user experience while working with the Converge web views.

Security

This in-depth session covers how to define security settings in Prolog Converge and how to leverage Security previously set up in the Prolog Manager application.

Workflow Templates

In this unit, participants will learn how to create and maintain pre-defined Workflow Templates which are used to automatically route records to pre-defined approvers.

Monitored Directories

This in-depth session covers how a Monitored Directory record must be configured for each directory that you would like to monitor for new files.

Document Identification

This in-depth session covers how the Document Identification record is used to route the processed emails. This form defines the Database, Project, and Prolog Document Type which will be assigned to incoming email.

Web Views

Overview

In this unit, you will learn about the business value created through the Web module.

Views

This in-depth session covers how to set up Prolog Converge Views which control the data content, layout and accessibility by user.   These views will appear in the Prolog Converge web client user interface areas: Portfolio, Project and Insight.

Creating a New Views

In this unit, users will get hands-on experience with creating a new Project and Insight Views by modifying an existing views.

Styles and Template Views

In this unit, participants will learn how to set up styles that contains formatting settings for a view and may define custom fonts, colors, alignment and other text formats. Participants will also learn how template views can be used to facilitate the creation of multiple similar views.

Drill Down Only Views

In this unit, participants will learn how to set up Drilldown Only Views which allow users to start viewing data at a high-level and then drill down further to view more specific information.

Default Views and Web Preferences

In this unit, participants will learn how to define or adjust what default views are active for each security group. Participants will also review how to modify general settings for Web, Contact Search and Tracking functionality on specific fields.

Notifications

Overview

In this unit, you will learn about the business value created through the Notifications module.

Monitor Data Changes – Real Time

This in-depth session covers real time monitor data change notifications. You will learn to set up a new notification, configure a report content, design rules and criteria, and add recipients.

Monitor Data Changes – Scheduled

This in-depth session covers scheduled monitor data change notifications. You will learn how to set up a new notification, configure a report content, design rules and criteria, add recipients and schedule the notification distribution.

User Triggered Notifications

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.

Scheduling Published Reports

In this unit, participants will learn how to set up scheduled published reports which will be automatically generated and delivered via email to users included in a specific distribution list.

Preferences, Resending, Enabling and Disabling Notifications

In this unit, participants will learn how to set general notification preferences and how to resend notifications as necessary. They will also learn how to disable notifications for testing purposes and prior to making the notifications available to all Prolog Converge users.

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.

Day One *8:30-4:30*	**I.**	**Introduction**
		A. Course Objectives
		B. Prolog Solution Overview
	II.	**Prolog Manager Database Administration**
		A. Database Strategies
		B. Database Maintenance
		C. Database and Project Templates
	III.	**Security Manager**
		A. Prolog Security Model
		B. User Accounts
		C. Security Settings
	IV.	**Setup and Configuration**
		A. Data Import and Export
		B. Preferences
		1. Project & Portfolio Specific Options
		2. User Specific Options
		C. Nomenclature
		D. Navigation Pane
		E. User Defined Fields
	V.	**Word Processing**
		A. PM Writer Documents and Templates
		B. Dunning Letters
		C. Word Processing Logs
	VI.	**Queries and Reports**
		A. System Queries
		B. Auto Alerts and New Queries
		C. Report modifications

Day Two
8:30-4:30
	I. **Prolog Converge Admin Introduction**
	 A. Objectives
	 B. System Architecture
	 C. Installation Components
	II. **Admin Tool Overview**
	 A. Login & Modules
	 B. Reconfiguration
	III. **System Configuration**
	 A. Portfolio Configuration
	 B. Security
	     i. Security Groups
	     ii. Authorities
	 C. Data Access Servers
	 D. Value Sources
	 E. DMS Preference
	 F. Logos
	 G. Lookup Lists
	 H. Processing Servers
	     i. E-mail Server
	     ii. Notifications Server
	     iii. Index Server
	 I. Quick Upload Folders Configuration
	 J. Record Locking

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Day Three
8:30-4:30
	I. Web Views
	   A. View Types
	   B. Creating New Project Views
	   C. Creating Insight Views
	   D. Template Views
	   E. Drilldown Only Views
	   F. Default Views
	   G. Preferences/Web Settings
	
	II. Notifications
	   A. Overview
	   B. Monitor Data Changes Real Time
	   C. Monitor Data Changes On Schedule
	       i. Grouping
	       ii. Distribution lists
	   D. User Triggered
	   E. Published Reports
	
	III. Notifications Preferences
	   A. Notification Options
	   B. Resending
	   C. Sending the Next Batch
	
	IV. Workflow
	   A. Project Roles and Security Groups
	   B. Workflow Diagram and Notifications
	
	V. Project Mail Configuration Overview
	VI. Document Monitoring Overview
	VII. Resources and Next Steps
	   A. Support Knowledge Base
	   B. Additional Training and Professional Services