



PROLIANCE



Meridian Professional Services

Proliance Administrator Training

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Who Should Take This Course

Proliance System Administrators who will be responsible for the configuration and ongoing maintenance of the Proliance system.

Pre Requisites

Attendance in the Proliance Foundations class and at least one unit of the Business Applications class; IT, web, and network expertise.

What You Will Learn

The Administration & Configuration course provides the tools and knowledge for administrators to implement and support the Proliance installation.

Knowledge to Leverage	<ul style="list-style-type: none"> ✓ Shaping the initial Proliance implementation ✓ Configuring and maintaining Proliance to meet your organizational needs
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Tools to Use	<ul style="list-style-type: none"> ✓ Configuration tool for field requirements, names, related lookups ✓ Settings for user accounts, security roles and permissions ✓ Templates (Organization, Program, Projects, Documents) ✓ Workflow configuration for Proliance documents
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Post Requisites

- ✓ Actively participate and provide input into the changes to their Proliance configuration during implementation
- ✓ Maintain Proliance solution going forward

Topic Descriptions

Introduction and Overview of Proliance

Proliance Overview

As an introduction to the course, trainees will learn how Proliance services and applications are organized, how functionality is laid out in workspaces, and have a foundation for diving into the details of Proliance.

Technical Look At Proliance

This overview of Proliance architecture and deployment options with a discussion on Proliance integration will provide the technical resources with knowledge to explore options for Proliance extendibility.

Implementation Process

This module focuses on Meridian best practices for implementing Proliance solution. Trainees will learn where configuration fits into the overall process and what configuration tools are used to customize Proliance to meet their organizational needs. After a quick review of the overall steps for configuring Proliance, trainees will learn the steps for configuring a new Proliance installation, including defining the File Management System (FMS), data storage, and the creation of an Organization account and an administrative user account.

Program and Project Set Up

Trainees will learn how to create new programs and project and what reference data can be added to the templates to ensure consistency in production environment.

Address Book

In this module trainees will learn how to create company and contact documents and how to manage users' access to organization, program and projects.

Security

Trainees will get an opportunity via hands-on practice to set up new security roles and categories. Furthermore, trainees will explore through scenarios how instance level security and exclusive categories allow for very granular security structure.

Lookup Editor

Lookup List Configuration

To ensure consistent use of company terminology and improve reporting, Proliance offers the ability to create lookup lists tailored to your organization. This unit describes how to create those lists.

Custom Print Layouts

In this module trainees will learn how Office 2003 integration enables report writers to create custom print layouts (CPLs) in Word or Excel to display data in a specific order and format. You will create Custom Print Layout files, add them to Proliance, associate them with specific documents in Proliance, and run the reports using the CPL.

Configuring Document Templates and Workflow

Creating and Modifying Templates

Trainees will understand what templates need to be created for a successful implementation and will know exactly how to create Document templates (sub-types).

Defining Workflow for Proliance Documents

Trainees will make the workflow defined in the previous section come to life by configuring workflow for that specific document. After configuration, users will have the opportunity to view the document from the user perspective and see the notices and state changes generated by that workflow.

Resource Editor

Tailoring Field Nomenclature

Trainees will learn how to modify Proliance fields using the Resource Editor tool to fit company lingo or to adapt for use in other countries.

Change Management

Meridian best practice for maintaining Proliance solution will be discussed in this module. There will also be a hands-on opportunity for trainees to use tools such as Copy Configuration Utility and TPL files templates for copying configuration between different environments.

Troubleshooting and Support

Troubleshooting Tips and Resources

This module provides tips for troubleshooting in Proliance and what resources are available for support.

Typical Agenda

This 3-day class is a combination of Lecture, Demonstration, Hands-on Practice, and Discussion of how concepts and features learned will apply at your company. Each class day includes breaks and lunch, resulting in a daily in-class time of approximately 7 hours.

<p>Day One</p>	<p>Introduction and Overview of Proliance</p> <ul style="list-style-type: none"> • What is Proliance? • Proliance Workspaces • Navigation through User Interface • Business Applications and Services • Business Process Management • Workflow <p>Technical Look At Proliance</p> <ul style="list-style-type: none"> • Architecture • Deployment • Integration Overview • Log On Options <p>Implementation Process</p> <ul style="list-style-type: none"> • Environment Considerations • Steps for Implementing Proliance • Configuration Tools Overview • Introduction to Proliance Local Admin <p>Program and Project Set Up</p> <ul style="list-style-type: none"> • Programs and Projects Defined • Reference Program and Projects <p>Address Book</p> <ul style="list-style-type: none"> • Company and Contacts Documents • User Access
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Day Two	<p>Security</p> <ul style="list-style-type: none"> • Roles and Categories • How Security is applied • Exclusive Categories <p>Cost Related Configuration Settings</p> <ul style="list-style-type: none"> • Cost Account Grouping Codes • Limits of Authority • Holds <p>Lookup Editor</p> <ul style="list-style-type: none"> • Configuring Lookup Lists • Versions Manager <p>Custom Print Layouts</p> <ul style="list-style-type: none"> • Set Up and Configuration • Word Custom Print Layout • Excel Custom Print Layout
Day Three	<p>Configuring Document Templates & Workflow</p> <ul style="list-style-type: none"> • Defining Document Templates • Configuring Proliance Workflow <p>Resource Editor</p> <ul style="list-style-type: none"> • Tailoring Field Nomenclature <p>Change Management</p> <ul style="list-style-type: none"> • Migration Methods • TPL File Templates • Copy Configuration Utility • Best Practice <p>Troubleshooting & Support</p> <ul style="list-style-type: none"> • Installing Service Packs • Troubleshooting Tips & Resources <p>Review and Summary</p>