



Proliance Admin

Training Manual



Chapter 1: Proliance User Interface Overview

1	What is Proliance?.....	3
2	How do users access Proliance?	5
3	Proliance Workspaces	7
4	Getting Around in Proliance	9
5	Preference Tools	11
6	Proliance Business Applications & Services.....	13
7	Proliance Registers.....	17
8	Documents: Opening & Creating	19
9	Documents: Structure and Tools	21
10	Documents: Content and Usage	25
11	What is Business Process Management?.....	27
12	Proliance Workflow	29
13	Proliance Workflow Types	31
14	Workflow Resources.....	33
15	Executing Workflow	33
16	Review Questions	34

Chapter 2: Technical Overview

1	Proliance Architecture.....	3
2	Logical View of Proliance Architecture	5
3	Technical View of Proliance Architecture	7
4	Proliance Deployment	9
5	Integration Overview.....	11
6	Log On Options.....	19
7	Solution Accelerators.....	27
8	Review Questions.....	32

Chapter 3: Implementation

1	Proliance Environment Considerations.....	3
2	Steps for Implementing Proliance	5
3	Installation.....	7
4	Proliance Configuration Tools	9
5	Introduction to Proliance Local Admin	17
6	Navigating in Local Admin	19
7	Data Storages	23
8	File Management System	27
9	Creating New Storage Set	33
10	Creating New Data Storage	37
11	Creating an Organization Account.....	39
12	Managing Licenses	41

13	Creating Admin User	45
14	Review Questions.....	46

Chapter 4: Programs and Projects

1	Programs and Projects Defined	3
2	Reference Program and Reference Project	5
3	Creating New Programs and Projects	7
4	Program and Project Home Page	9
5	Review Questions.....	10

Chapter 5: Address Book

1	Introduction	3
2	Overview: Address Book & Contact Info	5
3	What are Company Documents?.....	7
4	How do I access Companies?	7
5	Proliance Company Types.....	9
6	Company Workflow States.....	11
7	Basic Steps to Create a New Company	13
8	What are Contacts and Staff?	15
9	Workflow States	15
10	Steps to Create Staff/Contact Documents.....	17
11	Steps to Enable Accounts for Staff/Contacts.....	19
12	Steps to Add a Staff/Contact to a Project.....	23
13	Steps to Add a Staff/Contact to a Program	25
14	Where Contacts, Staff, Accounts are Created or Modified.....	27
15	Important Terms and Definitions	29
16	Putting It All Together	30
17	Review Questions.....	32

Chapter 6: Documents Subtypes and Workflow

1	What is a Document Template (Sub-Type)?	3
2	How do I access Document Templates?	3
3	How do I use and access Document States?.....	3
4	Important Terms and Definitions	5
5	Proliance Workflow	7
6	Workflow State Rules with ACR	11
7	Working with Document Templates.....	17
8	Working with Document States	21
9	New States in a Document Template (Subtype).....	23
10	Exercise: Create Company Document Template.....	33
11	Exercise: Create Scope Document Template	37
12	Exercise: Create Custom Workflow State.....	41



13 Exercise: Create RFI Document Template 47

Chapter 7: Lookups

1	How are Lookup Lists Managed?.....	3
2	Types of Lookups	5
3	Working with the Lookup Editor	5
4	Getting Around Tabs in the Lookup Editor	7
5	Lookup Version Manager	13
6	Review Questions.....	20

Chapter 8: Cost Configuration

1	Cost-Related Configuration Settings Overview.....	3
2	Setting Grouping Codes	5
3	Setting Cost & Internal Periods	7
4	Limits of Authority	13
5	Working with Limits of Authority	17
6	Holdes	25
7	Working with Holdes	27
8	Review Questions.....	34

Chapter 9: Custom Print Layouts (CPLs)

1	What is CPL?	3
2	How does it work?.....	5
3	Setup & Configuration	5
4	Word Custom Print Layouts	9
5	Excel Custom Print Layouts	21
6	Review Questions.....	28

Chapter 10: Nomenclature

Resource Editor	1	
1	Introduction to Resource Editor.....	3
2	Working with the Resource Editor.....	5
3	Creating Custom Cultures	7
4	Review Questions.....	16

Chapter 11: Change Management

1	Configuration Changes.....	3
2	Migration Methods.....	5
3	Simple Configuration Migration Process Diagram	7

4	What Gets Migrated?	8
5	TPL File Template.....	11
6	Typical Process for Using TPL Templates.....	13
7	Copy Configuration Utility.....	15
8	Using Copy Configuration Utility	17
9	Important Terms and Definitions	19
10	Best Practices.....	21
11	Frequently Asked Questions.....	21
12	Review Questions.....	22

Chapter 12: Support

1	Troubleshooting Tips	3
2	Installing Service Packs	5
3	508 Compliance.....	9
4	Review Questions.....	10