COURSE ABSTRACT

Merative SPM Universal Access for Developers

9D54G

Course Description

This course provides students with a technical understanding of Merative Social Program Management (SPM) Universal Access (UA) configuration and customization.

SPM Universal Access enables citizens to determine suitable services and programs, apply for programs, and manage their interactions with agencies via citizen accounts. This course describes how to configure and customize SPM Universal Access features for agencies.

During the course, students will design and implement a simple end-to-end application that allows citizens to perform Triage, Screening, multi-program application, and submit Life Events.

General Information

Delivery Method: Self-paced with lab.

Audience: This course is intended primarily for developers and technical architects who will work on SPM implementation projects.

Topics: The course covers the following topics:
- The functions and features of Merative SPM Universal Access
- How to configure SPM Universal Access features
- How to customize SPM Universal Access features and provided artifacts
- How to troubleshoot applications based on SPM Universal Access.

Learning Objectives: After completing the course, learners should be able to:

- Use SPM Universal Access client features
- Configure Triage and Screening
- Configure multi-program Application and Intake
- Map application data to entities and PDF forms
- Configure Citizen Account
- Configure Life Events
- Configure Motivations
- Configure the look and feel of SPM Universal Access
- Outline the security features of SPM Universal Access
- Customize SPM Universal Access features and provided artifacts compliantly
- Troubleshoot configuration issues.

Prerequisites: Parts of this course will make more sense if you take the courses listed below first. However, you can take this course first to get an overall understanding of Universal Access backend configuration and then take IEG and CER training afterwards if you need it.

- *Merative SPM Intelligent Evidence Gathering (IEG) for Developers 7.X*
- *Merative SPM Express Rules for Developers (ADE)*
- *Merative SPM Express Rules for Developers (Application Integration)*

Duration: 32 Hours (for full course)

Skill Level: Intermediate

Version: This course was last updated for SPM V6, which used the Classical front-end for Universal Access. The Responsive Web App front end was released during SPM V7. However, the backend core concepts, and configuration is the same. The following list outlines the units that are not relevant if you are using the Responsive Web App:
- Unit 1 – Still relevant.
- Unit 2 – Triage is not relevant.
- Unit 3 – All very relevant
- Unit 4 – All very relevant
- Unit 5 – Worth taking as mostly the same.
- Unit 6 – Skip this as it's very different.
- Unit 7 – Look and feel is very different.
- Unit 8 – Worth taking.

If you are attempting the exercises, the earlier exercises are dependent on each other so you should do them in order. Exercises 15,17, and 20 are not relevant to the responsive UI

Notes

The course duration gives learners an estimate of how much time they need to allocate to the course. The course duration does not specify the actual time required to complete the course, which varies by learner. The course agenda

shows the schedule for a classroom (ILT) delivery. Learners taking this course in a self-paced environment should allow more time for exercises.

Course Agenda

Unit 1 – Introduction to Universal Access

Lesson 1. Course Introduction
Duration: 5 minutes
Learning objectives: After completing this lesson, students should be able to:
- Describe the course objectives.

Lesson 2. SPM Universal Access Features
Duration: 30 minutes
Learning objectives: After completing this lesson, students should be able to:
- Describe the purpose of SPM Universal Access
- Describe the features that Universal Access provides
- List the applications and SPM modules that interact with Universal Access.

Exercise 1. Execute Universal Access Features
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Perform screening, online application, and intake
- Access the Citizen Account.

Lesson 3. Review of Schemas, Scripts, and Rules
Duration: 30 minutes
Learning objectives: After completing this lesson, students should be able to:
- State the purpose of the following technologies:
  - SPM Datastore (CDS)
  - Intelligent Evidence Gathering (IEG)
  - Cúram Express Rules (CER)
- Outline the tools that are used to develop schemas, scripts, and CER rules
- Describe how Universal Access uses schemas, scripts, and rules during screening.

Exercise 2. Access a Schema, Script, and Rule Set
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Interpret a schema
- Review an IEG script in the IEG Editor
- Access CER rules in the CER Editor.

Lesson 4. Developing Universal Access Solutions
Duration: 15 minutes
Learning objectives: After completing this lesson, students should be able to:

- List the main artifacts that need to be configured for Universal Access features
- Outline the approaches for developing schemas, scripts and CER rules
- Distinguish between configuration and customization for Universal Access
- List the options for integrating Universal Access to external systems.

Exercise 3. Design a Solution for a Simple Scenario
Duration: 45 minutes
Learning objectives: After completing this exercise, students should be able to:

- Analyze requirements for a simple scenario
- Determine the main artifacts that are needed to support Triage, Screening, and Intake.

Unit 2 – Configuring Triage and Screening

Lesson 5. Configuring Triage
Duration: 35 minutes
Learning objectives: After completing this lesson, students should be able to:

- List the steps to configure Triage
- Describe the TriageInterfaceRuleSet classes
- Explain how to configure the Triage map
- List Triage system properties.

Exercise 4. Configure Triage
Duration: 65 minutes
Learning objectives: After completing this exercise, students should be able to:

- Configure Triage output: programs, services, and providers
- Configure a schema, script, and rule set by using system properties
- Execute the Triage and view results on the Triage map.

Lesson 6. Configuring Screening
Duration: 25 minutes
Learning objectives: After completing this lesson, students should be able to:

- Outline how Universal Access performs screening
- Explain the steps for configuring screening
- Describe the ScreeningInterfaceRuleSet classes
- List screening system properties.

Exercise 5. Configure a Screening
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a simple screening
- Configure an Online Category
- Perform screening and view the potential eligibility.

Unit 3 – Configuring Applications and Intake

Lesson 7. Configuring Manual Applications
Duration: 20 minutes
Learning objectives: After completing this lesson, students should be able to:
- Explain the options when applying for programs
- List the steps for configuring manual applications.

Exercise 6. Configure Service Areas and a PDF Form
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a PDF form for a program
- Configure local offices and service areas.

Lesson 8. Configuring Online Applications
Duration: 40 minutes
Learning objectives: After completing this lesson, students should be able to:
- Describe how citizens apply for programs online
- List the steps for configuring online applications
- Describe how to configure application information
- Explain how to configure application PDF forms
- List the system properties for online applications.

Exercise 7. Configure an Online Application
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure an application
- Link the application to Triage
- Perform online application and submission.

Lesson 9. Configuring Intake
Duration: 60 minutes
Learning objectives: After completing this lesson, students should be able to:
- Explain the application intake process
- Describe how to configure person search and match
- Describe the authorization process
- State the purpose of workflows for application intake
- List system properties for application intake

Exercise 8. Configure Intake
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure an application case and program
- Configure intake.

Unit 4 – Configuring Data Mapping

Lesson 10. Data Mapping Overview
Duration: 30 minutes
Learning objectives: After completing this lesson, students should be able to:
- State the purpose of data mapping
- Outline how data mapping operates
- Describe the steps for configuring data mapping
- List information sources for data mapping.

Exercise 9. Interpret a Configuration for Mapping
Duration: 35 minutes
Learning objectives: After completing this exercise, students should be able to:
- View the artifacts that are used for data mapping.

Lesson 11. Using the Data Mapping Editor
Duration: 25 minutes
Learning objectives: After completing this lesson, students should be able to:
- Describe the layout of the Data Mapping Editor
- Describe how to use the Data Mapping Editor.

Exercise 10. Configure a Mapping in the Data Mapping Editor
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a mapping in the Data Mapping Editor
- Submit an application and view the mapped evidence.

Lesson 12. Writing Mapping Specifications
Duration: 25 minutes
Learning objectives: After completing this lesson, students should be able to:
- State the purpose of mapping specifications
- Explain how to define mapping specifications in XML.

Exercise 11. Configure an XML Mapping
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Review a mapping specification
- Configure an XML mapping.

Lesson 13. Writing Mapping Configurations
Duration: 40 minutes
Learning objectives: After completing this lesson, students should be able to:
- Outline how data is mapped to a PDF form
- Outline how to write a mapping configuration to map to evidence entities.

Exercise 12. Configure an XML Mapping
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a mapping to a PDF form
- Submit an application and view a custom form with mapped data
- Review a mapping configuration.

Unit 5 – Configuring Citizen Account and Life Events

Lesson 14. Configuring Citizen Account
Duration: 50 minutes
Learning objectives: After completing this lesson, students should be able to:
- Describe how to modify the Citizen Account navigation artifacts and pages
- Describe how to configure account messages and system messages
- List the properties for configuring Citizen Account features.

Exercise 13. Configure an Outreach Campaign
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a simple Outreach Campaign and view the campaign on the home page.

Lesson 15. Building Life Events
Duration: 50 minutes
Learning objectives: After completing this lesson, students should be able to:
- Distinguish between Standard and Round-tripping Life Events
- Outline the operation of Standard Life Events
- Describe the steps for developing simple Life Events
- Describe the operation of Round Tripping Life Events
- List the steps for developing advanced Life Events

Exercise 14. Configure a Simple Life Event
Duration: 35 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a Standard Life Event
- Define the necessary data mapping
- Submit the Life Event to see the evidence that is added to the case.

Unit 6 – Configuring Additional Feature

Lesson 16. Configuring Motivations
Duration: 40 minutes
Learning objectives: After completing this lesson, students should be able to:
- Outline the purpose of Motivations by using an example
- Describe how Motivations operate
- Explain the steps to configure Motivations.

Exercise 15. Configure a Simple Motivation
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure a simple Motivation using provided artifacts.

Lesson 17. Securing Universal Access
Duration: 20 minutes
Learning objectives: After completing this lesson, students should be able to:
- Outline the authentication and authorization mechanisms in Universal Access
- Outline the authentication options
- List system properties for configuring account security
- List security deployment options and considerations.

Exercise 16. Configure Account Security
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Manage external users
- Determine the authorization roles for external users.

Lesson 18. Supporting Multiple Languages
Duration: 15 minutes
Learning objectives: After completing this lesson, students should be able to:
- List the types of artifacts that must be localized to provide multi-language portals
- Outline how to install localized artifacts for supported languages
- Explain how to localize artifacts.

Exercise 17. Add an Additional Language
Duration: 20 minutes
Learning objectives: After completing this exercise, students should be able to:
- Configure the default language menu
- Add dynamic translations to pages.

Unit 7 – Customizing Universal Access

Lesson 19. Customization Approaches
Duration: 15 minutes
Learning objectives: After completing this lesson, students should be able to:
- List the Universal Access artifacts and whether they can be modified
- Outline the customization techniques for Universal Access.

Exercise 18. Review Universal Access APIs
Duration: 25 minutes
Learning objectives: After completing this exercise, students should be able to:
- Access the Universal Access APIs.

Lesson 20. Customizing Universal Access Features
Duration: 35 minutes
Learning objectives: After completing this lesson, students should be able to:
- List the customization points for Triage and screening
- List the customization points for application and intake
- Outline the customization options for Citizen Account.

Exercise 19. Customize the Generic PDF
Duration: 40 minutes
Learning objectives: After completing this exercise, students should be able to:
- Modify properties for the generic PDF.

Lesson 21. Configuring the Look and Feel
Duration: 15 minutes
Learning objectives: After completing this lesson, students should be able to:
- List the artifacts that determine the look and feel of Universal Access pages
- Describe how to customize the following artifacts:
    o Application banner and navigation
    o Properties and Cascading Style Sheets (CSS)
    o Images.

Exercise 20. Customize the Look and Feel
Duration: 30 minutes
Learning objectives: After completing this exercise, students should be able to:
- Customize the Universal Access Player look and feel for the out-of-the-box menu and style.

Unit 8 – Development Approach

Lesson 22. Development Tasks
Duration: 35 minutes
Learning objectives: After completing this lesson, students should be able to:
- Outline typical development tasks
- Describe how to track screening usage
- Describe the tools for purging Universal Access data
- List Universal Access web services.

Exercise 21. Extract Screening Artifacts
Duration: 35 minutes
Learning objectives: After completing this exercise, students should be able to:
- Extract configuration data and view the dependencies between files.

Lesson 23. Customizing Universal Access Features
Duration: 20 minutes
Learning objectives: After completing this lesson, students should be able to:
- Outline the test approach and test tools for Universal Access
- List tools for troubleshooting Universal Access
- List documentation sources.

Exercise 22. Capture Troubleshooting Data
Duration: 25 minutes
Learning objectives: After completing this exercise, students should be able to:
- Extract configuration data for troubleshooting
- Reference Universal Access Guides.