

**COURSE ABSTRACT**

# Merative Social Program Management (SPM) 7.X Technical Overview

9D76G

**Course Description**

This course provides learners with a technical understanding of the features of Merative Social Program Management (SPM).

SPM provides a feature-rich development environment that allows organizations to implement social program management solutions. A good understanding of the SPM development environment, its technologies, and associated concepts is essential for all technical roles involved with SPM. This course provides an overview of SPM in terms of its architecture, technical features, and the support it provides for developing custom solutions. During the course, learners will explore the technologies and services that are used to build end-user features.

Using examples and hands-on exercises, learners will develop a broad understanding of SPM, which will enable them to interpret product information sources and take advantage of SPM features.

**General Information**

**Delivery Method:** Classroom (ILT) and self-paced with lab.

**Audience:** This introduction-level course is aimed at anyone who requires a technical overview of SPM, including developers, architects, project executives, database administrators, testers, system administrators (technical), and other technical personnel.

**Topics:** The course covers the following topics:

- The high-level architecture of SPM
- Services to manage cases and outcomes
- Business and technical services
- Implementing SPM solutions

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

- Define the key components of SPM
- Outline the runtime architecture and deployment architecture
- Access documentation tools and information sources
- Explore services for data-gathering and intake
- Explore services for supporting the case lifecycle and managing outcomes
- Describe the underlying business and technical services
- List the features of the application development environment (ADE)
- Describe how organizations can configure and customize SPM
- Outline the release, upgrade, and support processes
- Outline the features provided by the application modules

**Prerequisites:** Learners must have a basic understanding of n-tier application development and architectures, including object-oriented development and web development technologies. It is recommended that learners complete the following functional course before taking this course:

- *Introduction to IBM Social Program Management (SPM) 7.X: Functional Overview*(9D75G)

**Duration:** 16 Hours (2 days ILT)

**Skill Level:** Basic

**Version:** The course discusses the basic concepts of SPM, which do not change much from version to version. Changes since the last full update to the course are outlined in the addendum.

## 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 SPM

#### Lesson 1 – Course Introduction

Duration: 10 minutes

Learning objectives: After completing this lesson, learners should be able to:

- List the course objectives
- Outline the course format and resources
- List sources of help

#### Lesson 2 – SPM Overview

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline the needs-to-outcomes approach
- Briefly describe SPM from an enterprise architecture perspective
- Identify the high-level SPM components
- Describe product licensing using SPM Modularization
- Outline how SPM-based solutions are implemented

#### Exercise 1 – View an Example of an SPM Implementation

Duration: 5 minutes

#### Lesson 3 – Deployment Architecture

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Briefly describe the SPM runtime architecture
- Outline how SPM applications are deployed
- List the supported deployment platforms
- Run the SPM application

#### Exercise 2 – Start the SPM Application

Duration: 20 minutes

### Unit 2 – Services for Data Gathering and Intake

#### Lesson 1 – The SPM User Interface

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- List the access channels that SPM supports
- Identify the areas of the SPM user interface (UI)
- Outline how accessibility and localization are supported
- List the mechanisms for gathering data

- List the features in the ADE for developing the UI
- Use the SPM user interface and identify the artifacts that are used to generate the UI.

### Exercise 3 – Explore the User Interface

Duration: 30 minutes

### Lesson 2 – The Common Data Store (CDS) and Intelligent Evidence Gathering (IEG)

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- State the purpose of the Datastore
- List the features of IEG
- Outline the steps for creating and executing IEG scripts
- List the SPM applications that use IEG scripts
- Access an IEG Script and Datastore Schema

### Exercise 4 – Explore IEG Scripts and Datastore Schemas

Duration: 40 minutes

### Lesson 3 – Channels for Accessing SPM

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline the purpose of web portals and workspaces
- Describe the features provided by Universal Access
- Outline the deployment options for Universal Access
- Use the Citizen Portal to perform screening and online application

### Exercise 5 – Explore the Citizen Portal

Duration: 30 minutes

### Lesson 4 – Application Intake

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- State the purpose of Common Intake
- List the steps of the intake process
- Outline the purpose of the Data Mapping Engine
- List the artifacts for configuring Triage to Authorization
- Explore application cases

### Exercise 6 – Explore Application Cases

Duration: 20 minutes

## Unit 3 – Managing Cases and Outcomes

## Lesson 1 – Cases and Programs

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Describe the relationship between products, cases, evidence, and rules
- List the steps for delivering benefits by using cases
- List high-level requirements for building a product
- Explore case configuration

## Exercise 7 – Explore Integrated Cases and Product Delivery Cases

Duration: 15 minutes

## Lesson 2 – Evidence

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- List the features that SPM provides for managing the evidence lifecycle
- Distinguish between dynamic and non-dynamic evidence types
- Access the Dynamic Evidence Editor
- Outline how the Evidence Broker operates
- State the purpose of the Verification Engine

## Exercise 8 – Explore Evidence

Duration: 20 minutes

## Lesson 3 – Eligibility and Entitlement

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline how SPM performs eligibility and entitlement
- List the features of the Eligibility and Entitlement Engine
- View Eligibility and Entitlement configuration
- Outline the features of Financial Management

## Exercise 9 – Explore Eligibility and Entitlement

Duration: 15 minutes

## Lesson 4 – Outcome Management

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Briefly describe the main features of Outcome Management
- Outline the tasks for configuring assessments and outcome plans
- Perform an assessment and create an outcome plan
- Explore Outcome Management configuration

## Exercise 10 – Explore Assessments and Outcome Plans

Duration: 20 minutes

## Unit 4 – Business and Technical Services

### Lesson 1 – Rules

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- State where rules are used in SPM
- Describe the structure of Express (CER) rules
- Outline how CER rules execute
- Describe the approach for developing CER rules
- Outline how applications interface with CER rules
- Explore rules in the Editor

### Exercise 11 – Explore Rules

Duration: 15 minutes

### Lesson 2 – Workflow

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Describe the components of the Workflow Management System (WMS)
- Outline the elements of workflows
- Describe the tools for defining and managing workflows
- Describe how WMS components are used during workflow execution
- Outline how the WMS allocates tasks to workers
- View a process instance, process definition, and allocated task

### Exercise 12 – Explore Workflow

Duration: 15 minutes

### Lesson 3 – Calendaring and Correspondence

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline the Calendaring features in SPM
- List the features for correspondence management
- Explain the process for generating documents
- Generate a document and view its template

### Exercise 13 – Explore Correspondence

Duration: 15 minutes

## Lesson 4 – Enterprise Application Integration

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline the support SPM provides for EAI
- Describe the connectors
- List the pre-built adapters
- Outline how mobile applications are supported by using REST APIs
- Explore REST APIs

### Exercise 14 – Explore REST APIs

Duration: 15 minutes

## Lesson 5 – Security and Auditing

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Provide an overview of the SPM authentication architecture
- Describe the operation of SPM authorization
- Briefly describe the support for cryptography
- Outline how Public Access Security operates in
- Outline the auditing features provided by
- Access users and security configuration

### Exercise 15 – Explore Users and Security Roles

Duration: 15 minutes

## Unit 5 – Implementing SPM Solutions

### Lesson 1 – Project Development Overview

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Outline the typical stages in SPM project implementations
- State the critical success factors for SPM-based projects
- List project development tools
- Access product information

### Exercise 16 – Explore Product Information

Duration: 15 minutes

### Lesson 2 – Application Development Environment (ADE)

Duration: 20 minutes

Learning objectives: After completing this lesson, learners should be able to:

- List the client and server development features
- Identify the purpose of the key SPM and third-party development tools and technologies
- Explore development artifacts

### Exercise 17 – Explore Development Artifacts

Duration: 15 minutes

### Lesson 3 – The SPM Data Model

Duration: 10 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Interpret entity-relationship diagrams (ERDs) for the SPM data model
- Outline how the physical data model is created
- Access ERDs and the Data Dictionary

### Exercise 18 – Explore Entity Information

Duration: 15 minutes

### Lesson 4 – Configure and Customize

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- State the difference between configuration and customization in SPM
- List the resources to help understand out-of-the-box artifacts
- Outline the customization approach
- Describe the purpose of the Data Manager
- Explore Analysis Documentation Generator (CADG) output and APIs

### Exercise 19 – Explore the Analysis Documentation and APIs

Duration: 15 minutes

### Lesson 5 – Test and Deploy

Duration: 15 minutes

Learning objectives: After completing this lesson, learners should be able to:

- Define the typical levels of testing for SPM implementations
- Outline the performance considerations
- List typical deployment tasks
- Describe the general approach for data conversion and migration
- Export data to the file system

### Exercise 20 – Export Data to the File System

Duration: 15 minutes

### Lesson 6 – Support and Upgrade



**Duration: 15 minutes**

Learning objectives: After completing this lesson, learners should be able to:

- Interpret SPM product numbering
- Outline the main Support process and tools
- Briefly describe the upgrade process
- Access product support information

### **Exercise 21 – Access Product Support Information**

**Duration: 15 minutes**

## **Unit 6 – Additional Application Modules**

### **Lesson 1 – Miscellaneous Application Modules**

**Duration: 20 minutes**

Learning objectives: After completing this lesson, learners should be able to:

- Briefly describe the following modules:
  - Business Intelligence and Analytics
  - Identity Intelligence
  - Provider Match with Watson
  - Archiving

### **Lesson 2 – Income Support**

**Duration: 15 minutes**

Learning objectives: After completing this lesson, learners should be able to:

- Describe the purpose of Income Support
- List the modules that are required for Income Support
- Explain how the Income Support processes are used to assist clients and agency workers
- Outline how agencies adapt Income Support

### **Lesson 3 – Course Conclusion**

**Duration: 10 minutes**

Learning objectives: After completing this lesson, learners should be able to:

- Review the SPM structure
- List further training
- Restate the course objectives.

## **Addendum**

Learning objectives: The addendum provides an overview of the significant updates to SPM since the course was initially released. This includes the following topics:

- Citizen Engagement
- AI (Cognitive) SPM applications
- SPM on Kubernetes
- Other changes