ADM301: Application Administration

ADM301 is an intro-level course covering all aspects of Platform configuration, program management, and general system usage.

Course Objectives:

- Provide thorough, hands-on training for ProcessUnity application administrators.
- Ensure attendees build confidence and expertise using and configuring ProcessUnity's platform.
- Allow attendees to learn by doing, discussing, experimenting, and collaborating with others.

Format:

- Formal presentations, demos, examples, and interactive discussion.
- All attendees receive a course booklet of the slides for note taking.
- Reinforce understanding by completing and reviewing labs, quizzes, and real-life admin challenges via a personal ProcessUnity training (environment).

Day 1

7:30am Breakfast / 8:00am training room opens

8:30am Session Begins
- Welcome / Introductions
- Assign personal training environments

Topic 1 – Intro to ProcessUnity: The ProcessUnity SaaS platform, instances, logging in, the user experience, and basic data access / page layout.
- Framework
- Accessing the System/ Browsers / Login
- User Interface / Navigation / Buttons / Tasks
- Accessing Data / Global Search
- The Details Tab
- Architecture Overview / Details

Topic 2 – The ProcessUnity Platform: A deeper intro to ProcessUnity's platform, subject areas, data models, editing data, and the Help System.
- Subject Areas A-Z / Online Help Center
- Software as a Service (SaaS) overview
- ProcessUnity's Data Model / Relationships
- Data / Grids / Trees / The Change Log
- Files / Attachments

Topic 3 – Admin Introduction: Baseline admin topics, initial settings (logos, email settings, password policies, SSO, access restrictions, etc.).
- Application Administrator Essential Skills
- Access Settings / Password Policies / IP Ranges / SSO
- Instance Settings (Branding, Colors, Email Settings)
- Resource Data (Holidays, Workdays)
- Platform Limits
- Production vs. Sandbox / Sandbox Refresh
- Configuration Change Control (Sandbox→Prod)
- App Admins vs. Sys Admins

12:00pm Break
- Onsite Lunch / Additional Lab Time

Topic 4 – User Management: Manual and automated methods for user account administration, licenses, and login details.
- User Types / Licenses
- User Setup (Usernames, starting passwords)
- User Assistance (Password resets, unlocking, logs)
- Account Administration (activate, deactivate, unlock)
- Deleting Users / The Summary Tab
- Bulk Account Operations
- Access Security / Single Sign On (SSO) / Two Factor
- SSO Self Provisioning for Lite Users

ADM301: Application Administration

Topic 5 – Data Security: Dive into user access, security, permissions (roles/teams), data access, record ownership, and database archives.
- Roles / Teams / Permissions
- Record Ownership (Owner View and Owner Edit)
- Data Access / Entitlement / Data Permissions
- Security Monitoring Reports / Global Change Log

Topic 6 – Properties: Part 1: Defining standard data collection property types, configuring details, tooltips, colors/formats.
- Intro to Custom Properties / Systems of Record
- Property Creation / Property Details
- Basic Property Types (text, number, date, pick lists)
- People and Team Property Types
- Images / Vendor Pick Lists
- Track Changes vs. Capture History
- Display Attributes / Tooltips, Color, Formats
- Rules / Default Values / View & Edit Restrictions
- Property Usage / Deleting Properties

Topic 7 – Custom Grids: Customizing Subject Area / Task grids and Related Items tab display to highlight your important data.
- Subject Area Grids / Related Items Grids
- Filters / Columns / Presentation of Grids

5:30pm Session Ends

6:00pm Happy Hour

Day 2

7:30am Breakfast / 8:00am training room opens

8:30am Session Begins

Topic 8 – Expression Writing Intro: Learn the use cases and building blocks of writing expressions across a variety of areas of the system.
- What are Expressions?
- Expression Output Types
- Building Blocks of Expressions
- Expression Language
- Intro to Functions
- Expression Examples
- Using Emojis / Icons

Topic 9 – Properties: Part 2: Applying validation rules, auto-update rules, conditional color, conditional view/edit, and Reference Data.
- Validation Rules
- Auto-Update Rules
- Conditional Color
- Conditional Display/Edit
- Reference Data Properties
- Cascading Pick Lists
- Global Search / Search Keywords

Topic 10 – Calculated and Aggregate Properties: Calculated properties transform your data, and aggregates are powerful for summarizing related content.
- Calculated Properties
- Aggregate Properties
- Application-Level Properties / Global Variables
- Image Properties / Image Library / Calculated Images

12:00pm Break
- Onsite Lunch / Additional Lab Time

Topic 11 – External Components: Displaying live external content from other web sources directly in ProcessUnity.
- Global External Components
- Property-based External Components

Topic 12 – Data Import (Import Templates): Importing data to ProcessUnity using Import Templates, inserts vs. updates, keys, logs, and an intro to automation.
- System of Record
- Import Types (Items, Relationship, History)
- Creating Import Templates / Key Columns
- Processing an Import / CSV files / Log Files
- Hierarchical & Relationship Imports
- Automating Imports / External Import Options

Topic 13 – Data Export (Custom Reports): An introduction to Custom Reports as vehicle for extracts and to stage data for automated workflows via Buttons.
- Building a Custom Report / Groups / Filters / Sort
- Automating Exports / External Export Options
- Brief Intro to Charts / Dashboards
- Limits / Best Practices

5:30pm Session Ends

ADM301: Application Administration

Day 3

7:30am Breakfast / 8:00am training room opens

8:30am Session Begins

Topic 14 – Custom Buttons: Configuring custom buttons and actions to streamline workflow and increase user adoption.

- Intro to Buttons / What are they
- Creating & Configuring Buttons
- Permissions / Conditional Display & Enablement
- Events / Actions
- Benefits / Use Cases / Concepts & Ideas

Topic 15: Report Actions: Taking button workflow to the next level by processing multiple records at a time as defined in a custom report.

- Intro to Report Actions / Filtered Report Scope
- Permissions / Conditional Display & Enablement
- Forms / Steps
- Bulk Delete
- Bulk MS Word Template Generation

12:00pm Break

- Onsite Lunch / Additional Lab Time

Topic 16 – Notifications & Workflow: Configuring custom workflow for email-based notifications, the ProcessUnity Inbox, event triggering, reminders, and escalation.

- Custom Email Notifications / Inbox / Defining Events
- HTML Email Formatting (MS Word Template)
- Response / Dialog (commentary)
- Built-in Workflow / Action Items / Review & Approval
- Version Control

Topic 17 – Integration & Automation: An intro to automated batch processing, command line, scheduling options, web services & connectors.

- Overview of Integration & Automation Methods
- Special Web Pages for Import/Export
- cURL Scripting / Powershell Scripting
- Scheduling Jobs
- Web Services
- Connectors / External Data Providers

Topic 18 – Excel™ Connector: A review of the robust import/export capabilities using the Microsoft Excel add-on.

- Enabling / Installing Excel Connector
- Excel Pull (Custom Reports) / Filtering Options
- Excel Push (Import Templates)

Topic 19 – Microsoft Word Connector: An overview of single-click generation of Microsoft Word docs via reports using customer supplied templates.

- Microsoft Word Document Templates (.DOTX)
- Microsoft Word Content Controls
- Adding Word Templates to ProcessUnity
- Generating Word Documents / Templates Tab

Topic 20 – Analytics Database: A tutorial on pulling ProcessUnity data to a cloud-based reporting database for external reporting or integration.

- Configuring and Refreshing AnalyticsDB
- External Access via Other Tools
- Roundtrip Business Intelligence Capabilities

Topic 21 – Admin Best Practices: Tips & techniques to ensure your implementation is configured for optimal performance, scale, and user adoption.

Parking Lot Items / Lab Time

- Cover other topics requested by attendees
- Deeper Dive demos upon request
- Finish & review any open labs
- Final Q&A / Discussion

Conclusion

- Feedback / Course Survey

5:30pm Session Ends

This course officially ends at 5:30pm on the final day, though the topics in the afternoon of day 3 are higher-level, less structured, and overview oriented. ProcessUnity trainer(s) will be available every day for the entire time even if class ends early. Custom or personalized Q&A during lunch or following the course each day is available for attendees as time permits.