

# ADM101: Introductory Application Administration

**ADM101** is an intro-level course covering all aspects of Platform configuration, program management, and general system usage. Topics covered in this course are solution agnostic. We cover platform configuration themes in more detail than solution workflows.

## Benefits

- Receive thorough, **hands-on training** for Application Administrators, Power Users, and Program Architects.
- **Build confidence and expertise** using ProcessUnity as an application administrator.
- Learn by doing, experimenting, discussing, and **collaborating**.
- **Certificate** of Completion provided to all attendees.

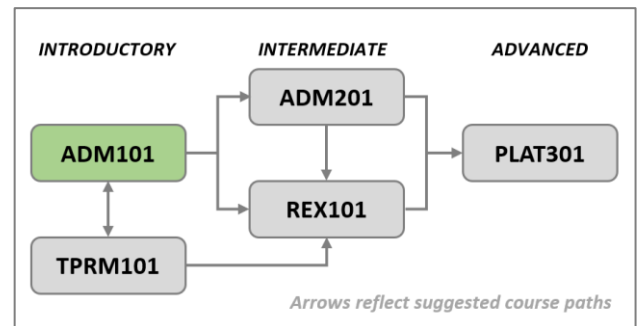


## Format

- **Guided learning** through formal curriculum, demos, and classroom discussion – catered lunches daily.
- **Individual training environments** for completing quizzes, labs, and challenges (tips and answers provided).
- **Personal training booklets** of all class material, for note taking and future reference.
- Roll-up-your sleeves / **highly interactive**.

## Prerequisites / Curriculum Path

- There are **no prerequisites** for attending ADM101. This course is intended for first-time administrators with little or no ProcessUnity experience required.
- Attendees who are **hand-on, detail-oriented, organized, and inquisitive** with any proficiency/comfort using **MS Excel** will thrive as a ProcessUnity Application Administrator.



## Day 1

### 8:00am training room opens / 8:30am Session Begins

- Welcome / Introductions
- Assignment of personal training environments

**Topic 1 – Intro to ProcessUnity:** The ProcessUnity SaaS platform, instances, logging in, the user experience, and basics of data access and page layouts.

- Framework
- Accessing the System/ Browsers / Login
- User Interface / Navigation / Buttons / Tasks
- Accessing Data / Global Search
- The Details Tab
- Architecture Summary

**Topic 2 – The ProcessUnity Platform:** A deeper intro to ProcessUnity’s platform, subject areas, data models, editing data, and the Online Help Center.

- Subject Area Overview (A-Z)
- Software as a Service (SaaS) overview
- ProcessUnity’s Data Model
- Relationships / Related Items
- Data / Grids / Trees
- The Change Log
- Files / Attachments
- The Online Help Center

# ADM101: Introductory Application Administration

**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)
- Images / Branding / Custom Colors
- Platform Limits
- Production vs. Sandbox / Sandbox Refresh
- Configuration Change Control (Sandbox → Prod)
- App Admins vs. Sys Admins

**Topic 4 – User Management:** Manual and automated methods for user account administration, licensing, and login details.

- User Types / Licenses
- User Setup (Usernames, starting passwords)
- User Assistance (Password resets, unlocking, logs)
- Account Administration (activate, deactivate, unlock)
- Deleting Users / Summary Tab
- Bulk Account Operations
- Access Security / Single Sign On (SSO) / Two Factor
- SSO Lite User Auto Provisioning (LUAP)

## 12:30pm Break

- Onsite Lunch / Additional Lab Time

**Topic 5 – Data Security & Permissions:** Dive into user access, security, permissions (roles/teams), data access, record ownership, and database archives.

- Security Overview / Roles / Teams / Permissions
- Record Ownership (Owner View and Owner Edit)
- Data Access / Entitlement / Data Permissions
- Security Monitoring Reports / Global Change Log

**Topic 6 – Properties: Level 1:** Defining data collection property types, configuring the Details tab, tooltips, colors/formats, etc.

- Intro to Custom Properties / Systems of Record
- Property Creation / Property Details
- Basic Property Types (text, number, date, pick lists)
- People and Team Property Types
- 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

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## Day 2

8:00am training room opens / 8:30am Session Begins

**Topic 8 – Basics of Expression Writing:** Learn the use cases and syntax for writing expressions across a variety of areas within the system.

- What are Expressions / The Expression Language
- Expression Examples / Intro to Functions
- Spotlight on IF / CASE / CASEX

**Topic 9 – Properties: Level 2:** Applying validation rules, conditional color, conditional view/edit, and Reference Data.

- Validation Rules
- Conditional Color
- Conditional Display/Edit
- Reference Data / Cascading Pick Lists

**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

## 12:30pm Break

- Onsite Lunch / Additional Lab Time

# ADM101: Introductory Application Administration

**Topic 11 – External Components:** Displaying live external content from other web sources directly in ProcessUnity.

- Global External Components
- Property-based External Components

**Topic 12 – Bulk Data Import:** Importing data in bulk to ProcessUnity via Import Templates and CSV files, inserts vs. updates, keys, logs, and an intro to automated importing.

- System of Record – Best Practices
- Import Types (Items, Relationship, History)
- Creating Import Templates
- Understanding Key Columns (ID, Ext ID, Name)
- Processing an Import / CSV files / Log Files
- Hierarchical & Relationship Imports

**Group Project #1:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Building Properties / Calculated Properties
- Organizing and Formatting the Details Tab
- Cleansing source data in Excel / Import in Bulk

**5:30pm Session Ends**

## Day 3

**8:00am training room opens / 8:30am Session Begins**

**Topic 13 – Intro to Reports & Dashboards:** An introduction to building Custom Reports, adding chart visualizations, defining dashboards, and exporting data in bulk.

- Why Custom Reports?
- Building your first Custom Report
- Bulk Data Export
- Charts and Dashboards

**Topic 14 – Intro to Workflow:** A brief intro to the tools and techniques to automate end-user activity via reduced click streams and event-based workflow.

- Notification Rules – Event based emails / Inbox
- Custom Buttons – Streamlining end-user tasks
- Report Actions – Performing tasks in bulk
- Automated Actions – Event-driven tasks
- ProcessUnity Connector – tasks across instances

**12:30pm Break**

- Onsite Lunch / Additional Lab Time

**Group Project #2:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Building a Custom Report with Filters/Groups/Sort
- Adding a Chart / Building a Dashboard

**Topic 15 – Admin Best Practices:** Tips & techniques to ensure your implementation is configured for optimal performance, scale, and user adoption.

**Group Project #3:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Data Manipulation with Buttons & Forms
- Controlling Edit Access via Buttons

**Parking Lot Items / Lab Time**

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

**Conclusion**

- Feedback / Course Survey

**5:30pm Session Ends**

This course officially ends at 5:30pm on the final day. Formal training content may end earlier, allowing for less structured discussion, experimentation, and additional time to work on labs and configuration exercises. ProcessUnity trainer(s) will be available every day until 5:30pm even when class ends early. Custom or personalized Q&A during lunch or following the course each day is available for attendees as time permits.

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