

ADM201: Advanced Application Administration

ADM201 is a deep-dive course geared to admins who are confident with the basics and are ready for advanced configuration topics. 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.

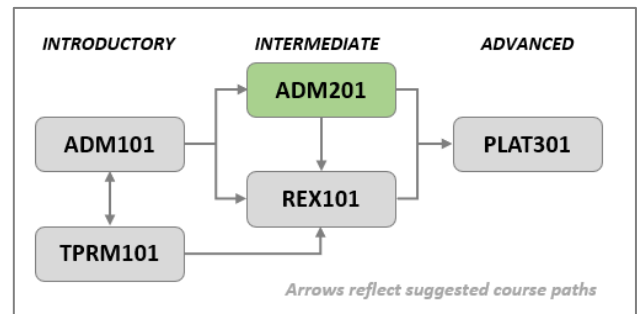


Format

- **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

- It is recommended that attendees are **proficient** with **basic administration topics** (i.e. **ADM101** or similar experience) before attending. This course is intended for admins who wish to dive deeper into platform config and workflow topics.
- 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 – Basic Admin Recap: Review the introductory topics of app administration to set the stage for deeper dive topics.

- Details Tab / Related Items
- Properties / Basic Property Configuration
- Calculated & Aggregate Properties
- Import Templates / Custom Reports
- Roles and Permissions / Data Security

Topic 2 – Properties / Advanced Features: Explore the common but advanced features around property configuration.

- View Access / Read Only
- Hide in Edit Mode
- Formatting / Color Coding
- Auto Update Rules / Event Types / Run Now
- Validation Rules
- Name Property
- ID and External ID
- Search Keywords
- Bulk Property Update
- Save Sequence Processing

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Topic 3 – Owner View / Owner Edit: Understanding record ownership related to Role restrictions and ownership properties.

- Role Switches to restrict Record Ownership
- Participate in Ownership Flag
- Data Access Restrictions – Access Tab

Topic 4 – Intro to Expressions: 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 / Examples
- Using Emojis / Icons

12:30pm Break

- Onsite Lunch / Additional Lab Time

Topic 5 – Intro to Functions: What are functions, how are they used. A dive into the ProcessUnity Function toolkit.

- Number, Date, Logical, and Conversion Functions
- Function Parameters
- Spotlight: IF / CASE / CASEX

Topic 6 – Notifications & Workflow: Configuring custom workflow for email-based notifications, the ProcessUnity Inbox, event triggering, reminders, and escalation.

- Notification Rules / Defining Events
- Custom Email Notifications
- The ProcessUnity Inbox
- Response / Dialog (commentary)
- Built-in Workflow / Action Items / Review & Approval
- Version Control

5:30pm Session Ends

6:00pm Happy Hour

Day 2

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

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

- Custom Notifications based on data changes
- Custom Notifications based on deadlines
- Variable Email Subject/Body Text
- Recipients / Conditional Recipients
- Manager Escalations

Topic 7 – 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 8: 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

Topic 9 – Automated Actions: Hands-off workflow to execute actions automatically based on customer-defined events.

- Intro to Automated Actions / What are they
- Enabling Automated Actions
- Use Cases / Best Practices

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 Workflow
- Custom Properties / Conditional View
- Custom Buttons / Forms / Actions
- Custom Notifications / Escalations
- Workflow-based Custom Report

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Topic 10 – ProcessUnity Connector: Expand the reach of your workflow actions to reach across instance boundaries.

- What is the ProcessUnity Connector?
- Configuring the ProcessUnity Connector
- Running Remote Steps

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

- ProcessUnity Connector
- Connecting Instances / Push & Pull of Data

5:30pm Session Ends

Day 3

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

Topic 11 – 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

Topic 12 – 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 13 – 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 14 – 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 15 – Third Party Content Connectors: A brief overview of the growing list of automated content connectors

- Partnerships & Connectors
- Content Provider Methods / How they Work

12:30pm Break

- Onsite Lunch / Additional Lab Time

Group Project #4: Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Excel Connector – Round Trip Data Export & Import

Group Project #5: Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Word Connector – Document Style reporting

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. 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.