

ADM301: Application Administration (Accelerated)

ADM301 is an “accelerated” introductory course geared to new or existing app admins to learn both basic and advanced configuration practices within the ProcessUnity platform. Topics are gathered from the ADM101 and ADM201 courses and are solution agnostic. We cover platform configuration themes in more detail than specific 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.

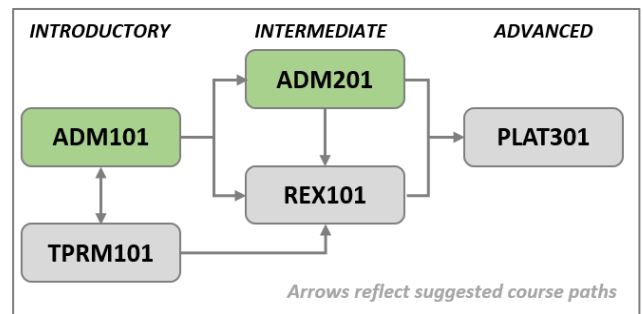


Format

- **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

ADM301: Application Administration (Accelerated)

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

- Lunch Break / 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 – 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

5:30pm Session Ends

6:00pm Happy Hour

Day 2

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

Topic 8 – 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 9 – Properties: Level 3: 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

ADM301: Application Administration (Accelerated)

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

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

- Global External Components
- Property-based External Components

12:30pm Break

- Lunch Break / Additional Lab Time

Topic 12 – 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 13 – 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

6:00pm Happy Hour

Day 3

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

Topic 14 – Intro to Reports & Dashboards: An introduction to building Custom Reports, adding chart visualizations, defining dashboards, and exporting data in bulk.

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

Topic 15 – 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

12:30pm Break

Lunch Break / 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 16: 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 17 – 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

5:30pm Session Ends

ADM301: Application Administration (Accelerated)

Day 4

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

Topic 18 – 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

Group Project #3: 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 19 – 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 20 – 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 21 – 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

12:30pm Break

Lunch Break / Additional Lab Time

Topic 22 – 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 23 – Third Party Content Connectors: A brief overview of the growing list of automated content connectors

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

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.

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