

# PLAT301: Platform Workshop

Did you ever try configuring something in ProcessUnity but didn't have the time, the know-how, or the opportunity? This workshop offers all three!

**PLAT301** is an advanced course geared to seasoned admins who are confident with basic configuration and are looking to collaborate with ProcessUnity staff (platform experts) and other experienced attendees to work through a variety of configuration exercises that employ the latest features and techniques available. We discuss, demo, and configure examples using creative methods to address advanced requirements that emerge in mature implementations. Attendees are encouraged to share real-life challenges as well.

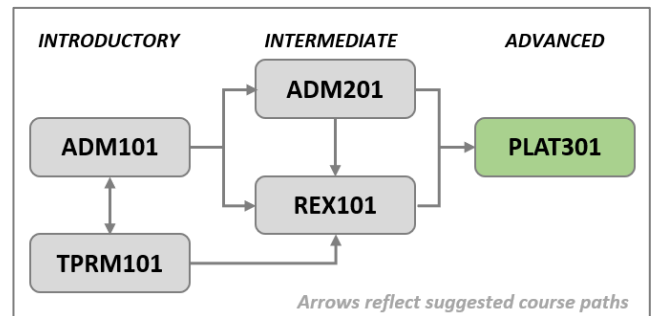
## Benefits

- Get **hands-on experience** configuring ProcessUnity in ways you didn't think possible.
- **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

- Demos, and classroom discussion – catered lunches daily.
- **Individual training environments** for completing interactive classtime exercises.
- Roll-up-your sleeves / **highly interactive**.
- Collaborative **Configuration** of pre-defined classroom exercises (1 to 2 hours each) distributed via handouts. Instructor will review (in detail) each exercise, get the class started, then provide time for attendees to configure. Assistance / best practices shared along the way.



## Prerequisites / Curriculum Path

- It is recommended that attendees are **proficient** with **administration, reporting, and expression writing** (i.e. **ADM201**) and also have 6+ months of ProcessUnity admin experience before attending. This course is intended for admins wishing to extend their capabilities and learn new tips and tricks from other power users.

## Group Exercises

This course is different from traditional training classes that are primarily based on formal lecture and predefined courseware. During our time together, we will work through a variety of group exercises in a collaborative manner and learn by doing. Several examples of these group exercises will be posed to the group and selected based on level of interest by attendees. Each topic will be represented with a real-life business case that will be handed out and discussed in detail prior to starting the group exercise.

A list of configuration topics is shown on the last page of this course summary.

# PLAT301: Platform Workshop

## Day 1

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

- Welcome / Introductions
- Assignment of personal training environments

**Topic 1 – Platform Overview:** A summary and discussion of some of the key configuration areas in the platform, which sets the stage for the remainder of the course.

- Properties
- Calculated & Aggregate Properties
- Event Types (Automated Processing)
- Auto Update Rules
- Buttons / Report Actions
- Automated Actions
- Notification Rules
- Custom Reports / Dashboards
- Import Templates

### Topic 2 – Attendee Collaboration / Topic Prioritization:

Discuss prepared examples of group exercises, and add others based on attendee interest.

- Review list of exercises / prioritize based on feedback
- Gather additional ideas for exercises

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

- Sample topics listed at end of this document.

### 12:30pm Break

- Onsite Lunch / Additional Project Time

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

- Sample topics listed at end of this document.

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

- Sample topics listed at end of this document.

### 5:30pm Session Ends

### 6:00pm Happy Hour

## Day 2

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

#### Morning Recap of Lessons Learned / Setup for daily projects

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

- Sample topics listed at end of this document.

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

- Sample topics listed at end of this document.

### 12:30pm Break

Onsite Lunch / Additional Project Time

**Group Project #6:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Sample topics listed at end of this document.

**Group Project #7:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Sample topics listed at end of this document.

### 5:30pm Session Ends

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## Day 3

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

**Morning Recap of Lessons Learned / Setup for daily projects**

**Group Project #8:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Sample topics listed at end of this document.

**Group Project #9:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Sample topics listed at end of this document.

**12:30pm Break**

Onsite Lunch / Additional Project Time

**Group Project #10:** Work with a partner to collaboratively implement a real-life (deep dive) project (1 to 2 hours).

- Sample topics listed at end of this document.

**Topic 3 – Product Roadmap Review:** Get a first-hand view at our product roadmap and review specific platform enhancements currently being developed.

- Review ProcessUnity's Product Roadmap
- Discuss key enhancements slotted for next release
- Feedback and Q&A – to influence product direction

**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.

**Sample Group Exercises Listed on next page...**

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## PLAT301 – Group Exercises

The Group exercises will be determined by the class after collectively reviewing, prioritizing and choosing from the following list of topics. Not all exercises can be covered in this single course. This list subject to change.

### A. User Interface / User Experience

- A1. Building Attractive Details Pages
- A2. Fit & Finish Techniques using Icons
- A3. Creating Personas with Simplified Roles to enhance UX
- A4. Incorporating Status Images on Detail Page
- A5. Applying Data Formats / Color Coding to Enhance Usability

### B. Buttons / Forms

- B1. Buttons to Create Issues and Notifications
- B2. Button Form enabled Details pages
- B3. Report Forms to Simplify Data Entry / Workflow
- B4. Workflow sequencing using [ButtonActionLastID]
- B5. Show/Hide Buttons for Property Sections using Globals
- B6. Pessimistic “Record Locking” using Button/Edit Workflow
- B7. Troubleshooting Lab: Multi-step Buttons

### D. Actions / Integration

- D1. Bulk Delete Actions
- D2. Automated Actions → Automated Workflow
- D3. ProcessUnity Connector & Remote Actions / Data & Attachments

### G. General Administration / Data Management

- G1. Configuring a new Custom Object from Scratch
- G2. Use of Property and Report Column Bulk Update (Attributes)
- G3. Global Update of Data via Report Actions
- G4. Excel Data Cleanup & Manipulation / Bulk Import
- G5. Staging and Creating Test Data via Button Clicks
- G6. Data Migration Tricks with Automated Actions

### N. Notifications

- N1. Notifications / Escalations / FX-based subject/body
- N2. Limit Notification Rules via Conditional Recipients

...and more!

### P. Properties / Auto Update Rules

- P1. Auto Numbering / External ID / Naming Conventions
- P2. Aggregate Property Magic
- P3. Tracking #days records are in a specific status
- P4. Using Email Address as the Unique ID for Individuals
- P5. Specialized Submit Logic vs. using Required Properties
- P6. Building a custom Comments log
- P7. Troubleshooting Lab: Calcs, Aggs, and Conditional Visibility

### R. Reporting / Analytics

- R1. Building Trend reports and Backloading of Historical Data
- R2. Transpose Reporting for Data Comparison Purposes
- R3. Replacing Subject Areas with Navigation Reports
- R4. Queue Reporting & Context Reports – how they work together
- R5. Enhancing the Inbox with Number box Dashboards

### Q. Questionnaires & Assessments

- Q1. Loading Historical Questionnaire Responses
- Q2. Rubber Stamping of Questionnaire Responses
- Q3. Bulk Pass/Fail of Question Responses using Report Actions
- Q4. Automated Methods for Default Scope on Assessment Type
- Q5. Dynamic Questionnaire Scoping (Linked Properties, Section Skip)
- Q6. Message Questions as Technique for out of scope Questions
- Q7. Using Embedded Hyperlinks in Questionnaire Questions

### W. Word / Excel Connectors

- W1. Excel Connector to Manage User Accounts
- W2. MS Word Connector to build Assessment Summaries
- W3. Add Color to those MS Word reports with VBA code