

# ADM101: Introductory Application Administration

**ADM101** is an introductory-level course for administrators covering most all aspects of platform configuration and general system usage. We focus on application settings, branding options, user management, Properties (including calculated and aggregate properties), bulk data import/export, introductions into reporting, dashboards, workflow, and admin best practices (solution agnostic).

## Benefits

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



## Format

- **Guided learning** via formal curriculum, demos, quizzes, group projects, and classroom discussion – catered lunches daily.
- **Individual training environments** for completing individual and group projects.
- **Personal training book** of class material, for note taking and future reference.
- Roll-up-your sleeves / **highly interactive**. Content supplemented via online LMS!

## Suggested Prerequisites

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

Course Focus:

- Heavy
- Moderate
- Light

	ADM101	ADM201	REX101	TPRM201	AA301
Course "Level"	1	2	2	1	1
Hands-On Labs	H	H	H	M	M
General Admin	H	H	M	M	M
Workflow	L	H		L	M
Report Writing	L	L	H	L	M
Expression Writing	L	L	H	L	M
TPRM / Config	L		L	H	M

## Day 1

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

- Welcome / Introductions
- Assignment of personal training instances

**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

**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
- Editing data
- Data storage (Grids vs. Trees)
- Files / Attachments
- The Change Log tab
- The Online Help Center

**Lab #1: Exploring ProcessUnity**

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**Topic 3 – Admin Introduction:** Baseline admin topics, initial settings (branding, settings, policies, SSO, sandboxes, etc.).

- Application Administrator Essential Skills
- Access Settings / Password Policies / IP Ranges / SSO
- App Settings (Branding, Date Formats, Email Settings)
- Resource Data (Holidays, Workdays, Colors)
- Instance Branding / Logos
- Platform Limits
- Production vs. Sandbox / Sandbox Refresh
- Admin Impersonation

## Lab #2: Branding

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

- User Types / Licenses / Creating Users
- Account Administration (activate, deactivate, unlock)
- Deleting Users / Summary Tab
- Single Sign On (SSO) / Two Factor Auth / LUAP
- WOBO (Work on Behalf Of)

## 12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #3: Creating Roles and Users**

**Topic 5 – Data Security & Permissions:** User access, security, permissions (roles/teams), data access, and record ownership.

- Security Overview / Roles / Teams / Permissions
- Record Ownership (Owner View and Owner Edit)
- Data Access / Entitlement / Data Permissions
- Key Reports (Roles, Login History, 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
- Basic Property Types (text, number, date, pick lists)
- People and Team Property Types
- Track Changes vs. Capture History
- Display Attributes, Tooltips, Colors, Formats
- Default Values
- View & Edit Restrictions by role, property value
- Property Usage, Upgrading/Deleting Properties

## Lab #4: Creating Properties

**Topic 7 – Custom Grids:** Customizing grids for Subject Areas, Tasks, Related Items, and Advanced Search to filter/highlight your important data.

- Subject Area & Related Items Grids
- Search Grids
- Advanced Pick List Search Grids
- Filters / Columns / Presentation attributes

**Group Project (A) BP Requests:** Work with a partner to collaboratively implement a real-life (deep dive) project.

- **Best Practice Workflow – Create/Submit Request**
- **Best Practice Workflow – Review/Approve Request**
- **Configuration – Modify TP Request form**

## 5:30pm End of Day 1

## 6:30pm -7:30pm Happy Hour

## Day 2

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

**Topic 8 – Properties: Level 2:** Applying basic expression writing to unlock additional features in Property configuration.

- Validation Rules / Auto Update Rules
- Conditional color coding
- Conditional Display/Edit by expression
- External Components / Image Properties
- Reference Data / Cascading Pick Lists

## Lab #5: Advanced Property Configuration

**Topic 9 – Calcs, Aggs, and Image Properties:** Calculated properties transform your data, icons help visualize values, and aggregates are powerful for summarizing related content.

- Calculated Properties
- Aggregate Properties
- Image Library / Calculated Images / Icons & Emojis
- Intro to Application / My Organization

## 12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #6: Calcs & Aggs**

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**Topic 10 – Bulk Data Import:** Understanding how to bulk import data into ProcessUnity via .csv Import Templates.

- 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

**Lab #7:** Bulk Importing Users, Third Parties

**Group Project (B) Properties/Imports:** Work with a partner to collaboratively implement a real-life (deep dive) project.

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

**5:30pm End of Day 2**

## Day 3

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

**Topic 11 – 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
- Intro to Charts and Dashboards

**Topic 12 – Key Admin Reports:** Reviewing several admin Standard reports and logs for administration / oversight.

- Config Summary / Changes
- Import / Export History
- Login History / Notification Log

**12:30pm Break**

- Onsite Lunch / Additional Lab Time
- **Lab #8:** Building a Report, Chart, Personal Dashboard

**Topic 13 – Intro to Workflow:** A brief intro to tools/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 task
- Report Actions – Performing tasks in bulk
- Automated Actions – Event-driven tasks

**Group Project (C) Buttons/Forms:** Work with a partner to collaboratively implement a real-life (deep dive) project.

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

**Topic 14 – Configuration Best Practices:** An overview of the documented best practices to ensure application admins are building manageable, scalable solutions with a focus on performance and user adoption.

- Online Help Center
- Cross referenced by categories / themes

**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**

- Review of other Public Training courses/options
- General Feedback / Course Survey

**5:30pm End of Day 3**

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, group projects, 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 daily lunch breaks or following the course each day is available for attendees as time permits.

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