PROCESSUNITY

Global Product Enablement

Certification Exam

Certified ProcessUnity Platform Specialist (CPPS)

CPPS Study Guide

REVISION 1.5

8-Aug-2023

ProcessUnity

ProcessUnity Platform Certification

ProcessUnity's certification testing program is intended for experienced application administrators (customers, partners, and employees) that measures individual knowledge of the configuring the ProcessUnity platform. The exam is generally agnostic from any implemented solution but slanted towards TPRM (third party risk management). There are two certification programs and designations:

1. **Certified ProcessUnity Platform Specialist (CPPS)** - The *first level* of certification tests general platform knowledge via a timed examination of multiple-choice questions. Administrators who pass this exam are awarded a "specialist" certificate valid for two years.
    - CPPS testing began May 2022

2. **Certified ProcessUnity Platform Expert (CPPE)** - The *second level* of certification that evaluates expertise through a variety of live challenges made up of short configuration challenges, contextual questions, and hands-on labs. Administrators who pass this exam are awarded an "expert" certificate valid for two years.
    - CPPE exams are only offered to administrators who have passed the CPPS
    - CPPE program development is underway and not yet available

Both certification exams are focused on demonstrating "platform experience," which includes knowledge of ProcessUnity's specific nomenclature, object model, feature set, and general platform capabilities. Understanding the nuances of what the platform *cannot* do is just as important as understanding what it can do. It is the knowledge of this nuance that allows successful administrators to effectively understand business requirements, design/build solutions that meet those requirements, and most importantly be able to confidently participate in conversations with clients and prospects about platform capabilities.

Earning a ProcessUnity certification is equivalent to a *black belt* for administrators, as it demonstrates to the world that this designation is worthy of esteem and respect regarding a specialized skillset implementing the ProcessUnity platform.

- ✓ Certification validates skills; improves **individual** career potential and marketability.
- ✓ Certification allows **customers** to scale their ProcessUnity solutions more easily.
- ✓ Certification validates **partner** effectiveness/maturity as a trusted system integrator

This study guide lays out the prerequisites and minimum learning requirements necessary to prepare and take ProcessUnity's CPPS certification exam.

CPPS Exam Format

The CPPS exam is an online, timed test comprised of multiple-choice questions where no two tests are identical.

a) The exam is taken online via ProcessUnity's learning system (LMS).
b) Multiple-choice format, 100 questions (single-select, multi-select, True/False).
c) Questions are randomly chosen from a growing 250-question database.
d) Multi-choice options for each question are randomly sequenced / presented.
e) The exam has a time limit of 60 minutes to complete.
f) Do not leave any answers blank. If you are unsure of an answer, use with your best guess, and review later as time permits. Blanks are graded as incorrect.
g) Questions are presented one at a time and can be revisited prior to submitting.
h) Once submitted, the exam will be closed, and your score will be shown.
i) A formal response will be emailed out within 3 days of completing the exam.
j) An 80% accuracy score is required to pass the exam.
k) Retries may be taken after a 7-day wait period. There is no limit to retries.

Passing the CPPS Exam

Individuals who pass the CPPS exam will be awarded a PDF certificate (personalized and sent via email). Those who wish a physical (embossed) certificate may request one (mailed upon request).

The CPPS distinction is valid for 2 years from issue date and can be renewed by taking the exam again at that time.

Those who pass the CPPS are encouraged to add "*ProcessUnity CPPS*" to their email footer (with a provided CPPS logo) and update their social media status accordingly. For example, by adding this designation to their *LinkedIn* profile in the **Licenses and Certifications** section.

The future exam (CPPE) will award individuals with a separate certificate, emblem, and possibly a physical award (details to be announced when the CPPE program becomes available).

CPPS Results

After submitting the exam, you will be shown your score immediately, and our team will get notification of your results 24 hours later. Please allow up to 3 days to receive a formal acknowledgement of your results (via email. The results are comprised of a final score, but also theme and section scores as well. If you do not pass, it is recommended to focus your learning on areas you need to improve.

ProcessUnity does not provide results of your actual test questions and answers.

ProcessUnity
Global Product Enablement

Candidate Profile

Name:	Fred Smith
Company:	Baden Software, Inc.
Exam:	CPPS - Certified ProcessUnity Platform Specialist
Enrollment Date:	06-Apr-2022 (Wed)
Test Date:	23-May-2022 (Mon)
Exam Score:	88%
Result:	Pass
Valid Through:	22-May-2024 (Wed)

You have achieved a passing score on the ProcessUnity CPPS exam! See results below by section. ProcessUnity's training team will be forwarding you a certificate of this achievement; a distinction valid for two years. As a Certified ProcessUnity Platform Specialist (CPPS) you are encouraged to share your accomplishment with your organization. You are also now eligible to take the performance-based CPPE exam (Certified ProcessUnity Platform Expert) when it becomes available in late 2022. **Congratulations!**

Exam Results by Section

Theme	Theme %	# Correct	Section	Questions	# Correct	# Incorrect	% Correct
General Platform Topics	94%	16 / 17	Architecture / Hosting / SSO	4	4	0	100%
			UI / Navigation	4	4	0	100%
			Object Model	4	4	0	100%
			General Admin	5	4	1	80%
Properties	92%	12 / 13	Properties – Basic	5	5	0	100%
			Properties – Advanced	4	4	0	100%
			Properties – Calcs & Aggs	4	3	1	75%
Reports & Dashboards	71%	10 / 14	Custom Reporting	5	3	2	60%
			Custom Reporting – Filters	4	3	1	75%
			Charting / Dashboards	5	4	1	80%
Permissions	75%	3 / 4	User Management / Permissions	4	3	1	75%
Import Templates	60%	3 / 5	Import Templates	5	3	2	60%
Expression Writing	78%	7 / 9	Expression Writing – Basics	4	4	0	100%
			Expression Writing – Advanced	5	3	2	60%
Workflow & Notifications	100%	18 / 18	Notification Rules	5	5	0	100%
			Workflow – General	3	3	0	100%
			Workflow – Buttons/Steps	5	5	0	100%
			Workflow – Report Actions / Auto. Actions	3	3	0	100%
			Workflow – Built In	2	2	0	100%
TPRM	100%	15 / 15	TPRM – General	4	4	0	100%
			TPRM – Portal	5	5	0	100%
			TPRM – Questionnaires Templates	4	4	0	100%
			TPRM – Assessments	2	1	1	50%
Connectors	80%	4 / 5	Content Connectors	3	3	0	100%
			Add-Ons	2	1	1	50%
Totals	88%	88 / 100	Totals	100	88	12	88%

ProcessUnity

CPPS Exam Readiness

Q

Is this test intended for me?
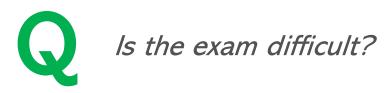*Am I ready to take the exam?*

The ProcessUnity CPPS certification exam is intended for experienced application administrators (customers, partners, and employees). The exam tests knowledge of the ProcessUnity **platform** – generally agnostic from any implemented solution – though a small portion of the test does focus on TPRM topics. Administrators may wish to rate their abilities on each topic below to determine exam readiness.

#	Skill	Rating
1	A strong general knowledge of what the ProcessUnity platform is capable of.	
2	Ability to design and personally build new programs on the ProcessUnity platform.	
3	Deep experience configuring the ProcessUnity platform.	
4	A deep understanding of ProcessUnity's nomenclature (terminology)	
5	A deep understanding of ProcessUnity's object model and object relationships.	
6	An understanding of ProcessUnity's platform limits / limitations.	
7	A deep understanding of user mgmt., roles, permissions, and data restrictions.	
8	Comfort authoring new Custom Reports and Dashboards from scratch.	
9	Comfort building Button workflows from the ground up.	
10	Confidence with the Function library and Expression writing.	
11	Ability to configure custom Properties to define a record's profile.	
12	Comfort with Calculated and Aggregate properties and how they work.	
13	Comfort with importing data in bulk from spreadsheets.	
14	Comfort with designing Notifications based on specific events	
15	Understanding of high-volume, report filtering, and performance techniques.	
16	Understanding of event-based triggers used in custom workflow.	
17	Comfort with content connectors and add-ons.	
18	Comfort building, scoping, and scoring Questionnaires / Assessments	
19	Knowledge of the Portal and how it works / and the features of the Portal	
20	Ability to troubleshoot (research and fix) issues with configuration.	

Self-Rating Scale	Self-Evaluation Results

High = 3 points
Med = 2 points
Low = 0 points
	Add up all points to determine **CPPS exam readiness:**
	   0-30 ...... Suggest gaining more experience first.
	   31-49 .... Suggest reevaluating skills in 3-6 months
	   50-60 .... Ready to take CPPS exam.

CPPS Exam Difficulty

Q   *Is the exam difficult?*

Both the CPPS and CPPE are reflections of an administrator's experience and comfort level single-handedly configuring and implementing solutions on the ProcessUnity platform.

It is recommended that new administrators gain real-world experience before seeking ProcessUnity platform certification. **Certification is intended to be a distinction that separates new administrators from seasoned specialists/experts.** For this reason, ProcessUnity does not wish to employ a *simple* exam that diminishes the value of a passing grade. Those who earn a CPPS certificate join a distinguished group of individuals and should feel proud of this accomplishment.

Part of the CPPS exam's difficulty is the speed at which questions must be answered. With 100 questions to answer in a 60-minute, admins have (on average) about 30 seconds to read and answer each question. Answering 2 questions every minute would take 50 minutes, with a 10-minute review.

Note, some questions are "multi-answer" which are more difficult than "single-selects." To get credit for these questions, all correct options must be chosen without selecting any incorrect options.

Sample CPPS exam questions (and answers) are shown at the end of this document.

CPPS Exam Topics

CPPS exam questions cover a variety of platform topics across the following areas:

1. **General Platform Topics**
   - Architecture / Hosting / SSO
   - UI / Navigation
   - Object Model
   - General Admin
2. **Properties**
   - Basic, Advanced
   - Calcs & Aggs
3. **Reports & Dashboards**
   - Custom Reporting
   - Custom Reporting – Filters
   - Charting / Dashboards
4. **Permissions**
   - User Management / Permissions
5. **Import Templates**
   - Import Templates
6. **Expression Writing**
   - Expression Writing – Basics, Advanced
   - Expression Writing – Function Library
7. **Workflow & Notifications**
   - Notification Rules
   - Buttons/Steps/Triggers
   - Report Actions
   - Automated Actions
   - Other Workflow (Dialog, Version Control, States)
8. **TPRM – Third Party Risk Management**
   - General TPRM topics / flow
   - Portal
   - Questionnaires Templates
   - Assessments
9. **Connectors / Add-Ons**
   - Content Connectors
   - Add-Ons

ProcessUnity

CPPS Exam Preparation

Q How can I prepare for the CPPS?

Below are the best methods to prepare for the CPPS exam.

1. **ProcessUnity Learning Center (LMS)** – ProcessUnity's LMS is currently available for customers, partners, and employees based on specific programs they are registered for. This Learning Center provides recorded content on a variety of topics, with quizzes and homework that help reinforce the material. The courses that are helpful for CPPS readiness include:
   - **Admin Academy** – topics targeted to Admins to learn the platform
   - **Webinars** – recorded webinars on a variety of ProcessUnity topics
   - **Admin Jeopardy** – a fun interactive quiz game based on platform topics

   In addition to the Admin Academy, a personal training instance can be used as a supplemental asset to explore and test your knowledge. Built into the Admin Academy lessons, challenges are posed that can be practiced in this training instance. Answers to the challenges are also provided.

   To request access to ProcessUnity's LMS and/or a companion training environment, please email training@processunity.com

2. **Configuration Experience / Working with Experienced Admins** – By far the best way to prepare for the CPPS is to gain practical experience through direct client implementations and learning from others. Each real-world "build" provides experience that cannot be gained by any other means, as it forces administrators to tame the platform to solve real business challenges and workflows.
   - **Employees** – gain experience by working on client implementations.
   - **Customers** – gain experience by enhancing/scaling your own solutions.
   - **Partners** – gain experience by working on multiple client implementations.

   For partners, meeting regularly with ProcessUnity's Partner Success team is a valuable method to supplement partner enablement by discussing/ answering questions that partners may not be asking in front of clients, and by reinforcing build techniques and related best practices to meet business requirements.

3. Online Help Center – The ProcessUnity online Help Center provides a wealth of platform help topics directly describing features and configuration methods which are addressed in the CPPS exam. Specific areas in the Online Help Center to review in detail are as follows:
   - Platform Glossary
   - Application Administration
   - Expression Writing
   - Reports & Dashboards
   - Assessments & Questionnaires
   - Configuration Best Practices

4. Training Events – Participating in face-to-face instructor-led training programs (when available) as well as ProcessUnity's Client Summits are excellent events to further your knowledge about ProcessUnity's capabilities. More information about training can be found at https://www.processunity.com/training and information about ProcessUnity's events can be found at www.processunity.com.

5. Admin Workshops / Private Training Events – Virtual or face-to-face training workshops are a great way to focus on specific learning topics requested by customers or partners. These private workshops may help to fine-tune existing programs learning and applying the best design/configuration methods known. Learning that occurs by working with ProcessUnity training and consulting experts is an excellent way to sharpen administrative expertise.
   - Details on private training - https://www.processunity.com/training.
   - Details on Customer Workshops – email your account executive.
   - Details for Partner Workshops – email your alliances/channels lead.
   - For any other information, please email training@processunity.com.

As more learning methods become available, they will be added to this list and updated at https://www.processunity.com/training.

Honor Code / Proctoring

Administrators who participate in ProcessUnity's certification exams are manifestly and knowingly attesting to an honor code, as follows:

Honor Code

By participating in ProcessUnity's certification exam(s), I pledge that I will maintain the highest degree of integrity by affirming that all responses reflect my own work, without the use of any unpermitted aids, external resources, or accessing other individuals during the testing period.

- ✓ I understand that this honor code, pledged by all who came before me, is in place to uphold the integrity of the ProcessUnity certification program.
- ✓ I understand that my professionalism is at stake, and that there will "no tolerance" towards dishonesty, cheating, or misrepresentation of your work in any way.
- ✓ I understand that sharing details about this certification test with others, which includes taking/sharing screenshots of the exam, or reviewing questions/answers with others is a violation of the honor code.
- ✓ I understand that violating this honor code can and will lead to automatic exam failure, and elimination from future attempts to gain any ProcessUnity certification.
- ✓ As a partner, I understand that violation of this honor code will result in expulsion in my organization's goal to achieve the esteemed designation of a "Certified ProcessUnity Partner" program.

Proctoring

ProcessUnity may be using online proctoring software for "exam security" in its certification exams to discourage cheating, as a deterrent to protect ProcessUnity's intellectual property (the exam itself) and protect ProcessUnity's brand / reputation. These proctoring tools reduce friction and stress from the testing experience, allow the examination to be taken virtually (online), and help to keep ProcessUnity's IP safe. Not all exams, however, will be formally proctored in this manner.

When in use, proctoring tools/mechanisms employed may include:

a. Shared screens during testing process, to capture the inappropriate use of other screens/windows.
b. Camera to capture gestures and head/eye movement looking for and capturing inappropriate behavior when focus should be on the exam window.

When proctoring tools are being used, all recorded proctoring content is deleted after the exam has been officially graded and results disseminated.

CPPS Sample Questions

Sample CPPS exam questions are shown below. These sample questions reflect both the difficulty and format of the exam. Answers can be found at the end. Challenge yourself and use this as a study guide to judge readiness for taking the exam, and research why the answers are what they are.

1. **What is the ProcessUnity timeout interval for inactivity?**
    a. After 10 minutes of inactivity user is logged off.
    b. After 20 minutes of inactivity user is logged off.
    c. After 30 minutes of inactivity user is logged off.
    d. There is no inactivity timeout that automatically logs out users.

2. **How can you add comments in a ProcessUnity expression?**
    a. Begin comments with //
    b. Begin comments with #
    c. Wrap comments between /* and */
    d. The expression window does not support adding comments

3. **How do you restrict access to a custom "Approve" button to the "LOB" role?**
    a. Settings / Roles / LOB role / Access tab
    b. Settings / People / Access tab / Buttons tab
    c. Settings / Buttons / Approve button / View Access tab
    d. Settings / Buttons / Approve button / Permissions tab

4. **How many custom (domain/section) scores are permitted on a Questionnaire?**
    a. 0
    b. 16
    c. 30
    d. unlimited

5. **Which feature allows internal users to temporarily assign their workload to others?**
    a. Impersonation (Switch User)
    b. Delegation
    c. SOD: Shared Owner Delegation
    d. WOBO: Work on Behalf Of

6.   What most accurately defines the "External Component" property type?
    a.   Displays Custom Reports from other ProcessUnity instances in a container
    b.   Displays any external webpage in a container
    c.   Displays any iframe-enabled, external https content in a container
    d.   Displays output from customer-led integration jobs in a container

7.   Which function is best used to ensure a [postal code] will not exceed 5 characters?
    a.   `LEN()`
    b.   `MAX()`
    c.   `MIN()`
    d.   `MID()`

8.   Which feature is used to count the number of uploaded files on the Attachments tab?
    a.   Auto Update Rule
    b.   Aggregate Property
    c.   Calculated Property
    d.   Numeric Property

9.   Which method is <u>not</u> supported for setting "Date-Timestamp" property values?
    a.   Auto Update Rules
    b.   Import Templates
    c.   Buttons / Report Actions
    d.   Data entry (edit mode)

10.   Which statement is true regarding the "Active Questionnaire" task in the Portal?
    a.   Displays whichever questionnaire the respondent wishes to view
    b.   Displays the most recently sent questionnaire
    c.   Displays the oldest unsubmitted questionnaire
    d.   Displays the questionnaire tied to the latest open assessment

11.   Which of these functions has the most number of mandatory parameters?
    a.   `DAYSBETWEENB()`
    b.   `TIMESTAMP()`
    c.   `REPLACE()`
    d.   `MID()`

12.   Which workflow feature is non-interactive (hands-free)?
    a.   Create New Version
    b.   Buttons
    c.   Report Actions
    d.   Automated Actions

13. Which is the best technique to improve performance on high-volume reports?
    a. Using Design Time Filters
    b. Using Run Time Filters
    c. Reducing the number of Report Columns
    d. Reducing the number of Report Groups

14. Which feature is used to show only the Top 50 Suppliers by [Spend], on a report?
    a. Row Limit
    b. Transpose
    c. Context Report
    d. Run Time Filters

15. Which capability is not supported using an Import Template?
    a. Creating relationships between two existing items (records)
    b. Deleting relationships between two existing items (records)
    c. Importing / modifying historically captured data
    d. Deleting existing items (records)

16. Which are true regarding ProcessUnity Dashboards? (select all that apply)
    a. Dashboards can display an unlimited number of charts
    b. One report's chart can be placed multiple times on a dashboard
    c. Dashboards always reflect real-time data
    d. Individual dashboard chart widgets can be resized
    e. Drilldown from dashboard charts to underlying report details is supported

Answers

13-A	14-A	15-D	16-BDE
9-D	10-C	11-C	12-D
5-D	6-C	7-A	8-B
1-B	2-A	3-C	4-C

If you got any answers wrong, research and experiment to figure out why. Learn from this.

Ready to Get Started?

Registering for the CPPS exam is done via https://www.processunity.com/certexam and clicking "register" to start the process.

Registering

1. Register for the exam.
2. Receive an email with a special link to access the exam.
3. Take the exam anytime within 30 days of receiving the email.

Taking the exam

1. Some exams will be proctored, meaning it will require you to turn on screen sharing and webcam. If proctored, instructions will be provided.
2. Once you "start" the test you must finish (or wait 7 days to try again).
3. By taking the exam, you are attesting to ProcessUnity's "honor code" and not cheat (in any way) or access any external help, systems, or individuals when taking the test.
4. Once you've answered all the questions, you will submit your exam.
5. Results (pass/fail and score) will be shown immediately, with a follow-up email sent separately (1-3 days later).

Those who pass

1. Join the growing and distinguished list of certified ProcessUnity professionals!
2. A signed CPPS Certificate will be emailed to you, along with a CPPS graphic for your email footer.
3. A physical embossed CPPS Certificate (and a cloth CPPS patch) will be sent to you upon request.
4. Your certification expires in 2 years -- retake the exam then to maintain your status.

Those who do not pass

1. Ask for a retest, which will be available 7 days from the last attempt.
2. Then try again. There is no limit to the number of retakes.

Good luck!