PROCESS DIRECTOR TRAINING

COURSE ORGANIZATION

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Training Portal Access

Access to the BP Logix training portal is acquired via a self-signup system. Your organization will receive a login code that enables a limited number of your users to create their own learning accounts. Each user, once you provide them with the login code, can create their own Learner account at https://bplogix.litmos.com/self-signup. Each user, when their account is created, is automatically assigned to a brief training course that instructs them how to use the Training Portal. Upon completion of this course, each user can self-assign the training that they need to take, based on the functions they will perform.

Learning Paths

For most users, BP Logix recommends that training courses be taken by signing up for the appropriate Learning Path in the training system, and **not** by signing up for individual training courses. Each Learning Path in the system covers the tasks needed to perform a specific role, by assigning the appropriate training courses for that role. Most of the Learning Paths require that the courses be taken in a specific order. The time required to complete each Learning Path depends on the length and number of courses that are included in that Learning Path.

Administrator Path

This Learning Path is for students who will administer Process Director Installations, but won't be performing any implementation tasks to create applications. There are three courses in this Learning Path:

1. Introduction to Process Director
2. Process Director System Administration
3. Securing Process Director
4. Permissions Methodology

Implementation Manager Path

This Learning Path is designed for users who will manage implementers but won't generally be performing implementation themselves. This Learning path provides a basic familiarity with how applications are developed in the low-code/no-code environment of Process Director. BP Logix also recommends that administrators consider taking this Learning Path, in addition to the Administrator Path, even if they will not be performing implementations. There are three Courses in this Learning Path:

1. Introduction to Process Director
2. Process Director Core Training

3. Developing Applications with Process Director

Implementer Path

This Learning Path is recommended for all users who will perform implementation/application development tasks in Process Director and provides the minimal training requirement needed to use the product effectively. There are five training courses in this path:

1. Introduction to Process Director
2. Process Director Core Training
3. Developing Applications with Process Director
4. Process Director Intermediate Training
5. Process Director Advanced Training

Advanced Implementation Path

This Learning Path builds on the Implementer Path to extend your knowledge to more advanced topics. It is recommended for implementers who already have some experience in creating applications, but who need to build on that knowledge. This Learning Path allows students to take courses in any order. There are eight training courses in this learning path, with the last two courses being relevant only to organizations that have purchased one or more additionally licensed components.

1. User Assignment
2. Workspaces and Dashboards
3. Case Management
4. Accessibility and Responsiveness
5. Using the Template Library
6. Permissions Methodology
7. Process Director Reporting Training
8. Stream Actions
9. Meta Data
10. REST Web Services
11. Advanced Design Concepts
12. Collaborative Document Features (Additionally licensed)
13. Mobile Application Component (Additionally licensed)

Process Director Path

This learning path contains **all** Process Director courses, to provide the fullest range of training available. Individuals who will be administering the system, as well as managing and implementing applications, may wish to consider assigning themselves to this path. This Learning Path allows students to take courses in any order.

Training Courses

Each outline below lists the Modules and Lessons included in each training course, along with estimated completion times. **All times are approximate**, as students may take varying amounts of time to complete the knowledge check quizzes or practical exercises included in each lesson.

Using the Litmos Learning Management System

Prerequisites: None
Length: 15 Minutes

Module	Lesson
Using Litmos (0.25 Hours)	System Overview
	Using the System

Introduction to Process Director

Prerequisites: None
Length: 30 Minutes

Module	Lesson
Introduction to Process Director (0.5 Hours)	Low Code Overview
	Application Creation Overview

Introduction to Intelligent Automation

Prerequisites: Introduction to Process Director
Length: 1 Hour

Module	Lesson
Introduction to IA (1 hour)	What is IA?
	IA Methodologies
	Keys to IA Success
	Implementing IA Projects

Core Training

Prerequisites: Introduction to Process Director
Length: 5 Hours, 30 Minutes

Module	Lesson
Introduction to the Process Director User Interface (0.25 hours)	Process Director Interface
Forms (1 Hour)	Form Definitions
	Building the Sample Form
Process Timelines (2 Hours)	Introduction to Process Timelines
	Forms and Process Timelines
	Creating the Child Activities
	Completing the Timeline
Business Rules (1 Hour)	Introduction to Business Rules
	Configuring Business Rules
	Applying Business Rules
Knowledge Views (1 hour)	Introduction to Knowledge Views
	Configuring Knowledge Views
	Knowledge View Best Practices

Application Development

Prerequisites: Core Training
Length: 45 Minutes

Module	Lesson
Developing Process Director Applications (0.75 hours)	The Application Design Process
	The Design Stage
	The Development Stage
	The Testing Stage
	The Release Stage

Intermediate Training

Prerequisites: Core Training
Length: 2 Hours, 45 Minutes

Module	Lesson
DataSources and Business Values (0.25 Hours)	Datasource Objects
	Business Values
Form Operations (1 Hour)	Instantiated Form Names
	Form Field Properties
	Filling Dropdown Controls
	Setting Form Data
Email Templates (1 hour)	Creating Email Templates
	Applying an Email Template to a Process Timeline
	Task Completion via Email
	Using Multiple-Message Email Templates
Process Timelines (0.5 Hours)	Process Timeline Activity Types
	User Activity Advanced Options

Advanced Training

Prerequisites: Intermediate Training
Length: 3 Hours, 45 Minutes

Module	Lesson
Processes (1 hour)	Subprocesses
	Administration
	Troubleshooting
Dev/Test/Prod cycle (1.5 Hours)	Exporting/Importing Content
	Importing Users, Content, and other Objects
	Handling data sources and other non-migrating objects
	Permissions methodology on production systems
	Import Utilities
Forms (0.75 Hours)	Visibility/Enabling/Read Only Scenarios
	Transform/Export Custom Tasks
Goals (0.5 hours)	Attachment Handling
	Goal result handling

Case Management

Prerequisites: Advanced Training

Length: 1 Hour

Module	Lesson
Case Management (1 hour)	Case Management Overview
	Implementing a Case Management Application
	Case Definition Overview
	The Sample Case Management Application
	Application Walkthrough

Advanced Design Concepts

Prerequisites: Advanced, Developing Applications

Length: 8 Hours

Module	Lesson
Introduction to Advanced Design Concepts (1 hour)	Designing Applications in Process Director
Forms (3 Hours)	Visibility/Enabling Scenarios
	Date Calculations
	Using the Journal Control
	Custom Validation
	Advanced Form Behaviors
Process Timelines (3 Hours)	Multi-Purpose Timelines
	Setting Sequence Numbers
	Creating an Approval Loop
	Configuring Multipurpose Activities
Configuring Other Objects (1 Hour)	Email Templates
	Knowledge Views

Reporting

Prerequisites: Intermediate Training

Length: 2 Hours

Module	Lesson
KView Reporting (1 Hour)	Using a KView in a form
	Passing Filter values
	Knowledge View Exporting
	Running Workflows on results
Advanced Reporting Component (1 Hour)	Introduction to Advanced Reporting
	Creating a report
	Customizing a Report

System Administration

Prerequisites: Introduction to Process Director

Length: 3 Hours, 15 Minutes

Module	Lesson
Administrative Workspace Overview (15 Minutes)	Administration Overview
Configuration (1 hour)	Workspaces
	Partitions
	Global KViews
	Object Permissions
User Administration (1 hour)	Administering Users
	Administering Groups
	Authentication Settings
	Delegation
	AD Synchronization
	User permissions
Installation Settings (30 Minutes)	Installation Settings
	Global Variables
	Database Settings
	Licensing
Troubleshooting/Security (30 minutes)	Server Control and System Information
	Impersonation
	Logging
	Email Tests and Help

Securing Process Director

Prerequisites: System Administration

Length: 45 Minutes

Module	Lesson
Security (0.75 Hours)	User Authentication
	Federated Identity
	Permissions Methodology
	Securing Process Director

Permissions Methodology

Prerequisites: System Administration

Length: 30 Minutes

Module	Lesson
Permissions (0.5 Hours)	Permissions Overview
	Setting Permissions
	Permissions Methodology

Accessibility and Responsiveness

Prerequisites: Advanced Training

Length: 1 Hour, 30 Minutes

Module	Lesson
Accessibility (1 hour)	Accessibility Overview
	Accessibility Requirements
	Creating an Accessible Form
Responsiveness (0.5 Hours)	Responsiveness and Process Director
	Creating a Simple Responsive Form
	Using Bootstrap

Collaborative Document Features

Prerequisites: Advanced Training

Length: 1 Hour

Module	Lesson
Collaborative Features	Collaborative Document Markup
	Collaborative Document Annotation

Mobile Application Component

Prerequisites: Core Training

Length: 30 Minutes

Module	Lesson
The Mobile App Component (0.5 Hours)	Creating Mobile Forms
	Mobile Data Sources

Using the Template Library

Prerequisites: Core Training

Length: 1 Hour

Module	Lesson
The Template Library (1 hour)	Introduction to the Template Library
	Creating an Application from a Template
	Customizing the New Application
	Creating Your Own Templates

Workspaces and Dashboards

Prerequisites: Core Training

Length: 45 Minutes

Module	Lesson
Workspaces and Dashboards (45 Minutes)	Workspaces
	Dashboards
	Workspaces and Dashboards

User Assignment

Prerequisites: Core Training

Length: 45 Minutes

Module	Lesson
User Assignment (45 Minutes)	User Assignment Basics
	Assignment Operations
	Task Completion

REST Web Services

Prerequisites: Advanced Training

Length: 1 Hour

Module	Lesson
REST Web Services	REST Web Services
	Using REST Services
	Building a REST Business Value

Meta Data

Prerequisites: Advanced Training

Length: 1 Hour

Module	Lesson
Meta Data	Metadata Overview
	Creating Metadata
	Applying Metadata
	Metadata and Knowledge Views

Stream Actions Object

Prerequisites: Advanced Training

Length: 45 Minutes

Module	Lesson
Stream Actions Object	Stream Actions
	Creating a Stream Action