PROCESS DIRECTOR TRAINING

TRAINING COURSE OUTLINES

Last revision: November 18, 2022

Contents

Using the Litmos LMS

Approximate Length: 0.25 hours
This course describes how to use the Litmos Learning Management System (LMS) used to present the Process Director training.

I. System Overview
   A. Introduction
   B. User Interface
      1. Home Page
      2. Content Library Page
      3. Achievements Page
II. Using the System
   A. System Organization
      1. Learning Paths
      2. Courses
   B. Learning Path Page
      1. Courses Tab
      2. Additional References Tab
   C. Signing Up for a Learning Path

Introduction to Process Director

Approximate Length: 30 minutes
This course describes the fundamental concepts behind Process Director and provides a brief demonstration of a Process Director application.

I. Course Introduction
II. Introduction to Intelligent Automation (IA)
   A. What is IA?
   B. What is a Process?
   C. Components
   D. Benefits
   E. What is an IA Platform?
   F. Process Engine
   G. Business Analytics
   H. Content Management
   I. Collaboration Tools

J. IA Platform Goals

III. Process Director Demo
   A. Process Director Objects
   B. Request Form
   C. Initial Approval
   D. Business Rules
   E. Conditional Task Assignment Benefits
   F. Completing the Process
   G. Process Management
   H. Review

Introduction to Intelligent Automation

Approximate Length: 1 Hour

This course is designed to familiarize students with the basic concepts needed to implement an IA initiative in their organization.

III. What is IA?
   A. Intelligent Automation
   B. Business Processes
   C. Process Reengineering

IV. IA Methodologies
   A. IA and Process Management
   B. Methodologies
   C. Conclusion

V. Keys to IA Success
   A. Prerequisites for Success
      1. IA Leadership
      2. Communication Strategy
      3. Senior Leadership Commitment
      4. IT Support
      5. Project Selection

VI. Implementing IA Projects
   A. Implementation Steps
      1. Prioritize Potential Projects
      2. Identify a Pilot Project
      3. Create Affinity Groups
      4. Make Organizational Changes

B. Practical Considerations
C. Pitfalls to Avoid
D. Conclusion

Core Training

Approximate Length: 3.5 Hours

This course provides the basic knowledge needed for implementers to create a simple Process Director application. This course describes how to use forms, Process Timelines, and Business Rules to construct an application, and how to use Knowledge Views to extract data from, and report on, the application's usage.

I. Module 1: Introduction to the Process Director User Interface
  A. Process Director User Interface
    1. User Interface
    2. Content List
II. Module 2: Forms
  A. Form Definitions
    1. What is a Form Definition?
    2. Form Characteristics
    3. Controls
    4. Create a Form
    5. Control Toolbar
    6. Adding a Control to a Form
    7. Saving the form
  B. Building the Sample Form
    1. Student Exercise Folder
    2. Sample Form Definition
    3. Preformatted Form
    4. Adding Controls
    5. Reviewing and Saving the Form
III. Module 3: Process Timelines
  A. Introduction to Process Timelines
    1. Process Timelines
    2. Gantt Chart
    3. Dependence
    4. Parent/Child Activities

5. Create a Timeline
6. Create a Timeline Activity
7. Timeline Activities
8. Constraints
9. Dependence
10. Eligibilty
11. Necessity
12. Delete Activities

B. Forms and Process Timelines
1. Forms and Process Timelines
2. Interoperability
3. Linking the Form
4. Linking the Process Timeline

C. Configuring a Parent Activity
1. Opening the Process Timeline
2. Activity Type
3. Looping
4. Cancel Loop
5. Adding a Condition

D. Creating Child Activities
1. Process Overview
2. Creating a Child Activity
3. Activity Tab
4. Participants Tab
5. Results Tab
6. Testing the Activity

E. Completing the Timeline
1. Adding the Remaining Activities
2. Dragging and Dropping Dependence
3. Dependencies with Start When

IV. Module 4: Business Rules

A. Introduction to Business Rules
1. Business Rules
2. Creating a Business Rules Folder
3. Creating a Business Rule

B. Configuring Business Rules

        1. Group in Value Property
        2. Form Associated with Business Rule Property
        3. Values Tab
    C. Applying Business Rules
        1. Apply a Business Rule to a Timeline
        2. Apply a Business Rule to a Form
        3. Embedded Sections
        4. Applying the Business Rule to the Embedded Section
        5. Testing our Business Rule
V. Module 5: Knowledge Views
    A. Introduction to Knowledge Views
        1. Knowledge Views
        2. Creating a KView Folder
        3. Creating a KView
        4. KView Properties
    B. Configuring Knowledge Views
        1. Properties Tab
        2. Options Tab
        3. Columns Tab
        4. Filter Tab

Application Development

Approximate Length: 0.75 Hours

This course describes the process of how to develop Process Director applications and is specifically tailored for non-programmers. It describes each stage of the application development process, best practices, and suggestions to successfully develop applications to reach the highest possible degree of buy-in from end users.

I. The Application Design Process
    A. Introduction
    B. The Customer
    C. Stages of Development
        1. Design Stage
        2. Development Stage
        3. Testing Stage
        4. Release Stage

   D. Development Environments
   E. Conclusion

II. The Design Stage
   A. Gathering Requirements
   B. Analyze and Question
      1. Incorporating answers into your Design
   C. Data to collect
   D. Process Mapping
   E. Application Objects
   F. Why do all this?
   G. Conclusion

III. The Development Stage
   A. Designing the Application Folders
   B. Building Objects
   C. Where to Start
   D. Best Practices
      1. General
      2. Development
      3. Forms
      4. Email Templates
   E. Development Testing

IV. The Testing Stage
   A. Why have a Testing Stage?
   B. Setting up the Test
   C. The Test Process
   D. Customer Communication

V. The Release Stage
   A. Importing the Application into Production
   B. Versioning
   C. Permissions

Intermediate Training

Approximate Length: 2.25 Hours

This course delves into more complex applications to describe the use of Data Sources and Business Values to use external data in an application, Form Operations, creating email templates, and Timeline operations.

I. Module 1: Datasources and Business Values
    A. Datasources
        1. Datasource Object
        2. Training Datasource
        3. Using Datasources
    B. Business Values
        1. Data Virtualization
        2. Business Value Properties Tab
        3. Business Value Configure Tab
        4. Using a Business Value
II. Module 2 Form Operations
    A. Instantiated Form Names
        1. System Variables
        2. Instantiated Form Name Property
    B. Form Field Properties
        1. The Form Controls Tab
        2. Control Properties
    C. Filling Dropdowns Controls
        1. What is a Dropdown Control
        2. Filling a Dropdown Control
            a. Manually Filling a Dropdown
            b. Using a Dropdown Object
            c. Using a Business Value
    D. Setting Form Data
        1. What is the Set Form Data Feature?
        2. Preparing the Form
        3. Set Form Data Tab
        4. Testing the Form
III. Module 3: Email Templates
    A. Creating Email Templates
        1. What is an Email Template?
        2. Creating an Email Template
        3. Formatting Message Text

4. Displaying Information with System Variables
    a. The System Variable Control
    b. The {EMAIL_URL} System Variable
5. Email Template Content
6. The Email Data Control

B. Applying an Email Template to a Process Timeline
1. Applying an Email Template
    a. Using a Default Email Template
    b. Using a Template in Timeline Activities

C. Task Completion via Email
1. Task Completion Control
2. Email Result Links
3. Email Complete Link
4. Email Complete URL

D. Using Multiple-Message Email Templates
1. What are Multiple-Message Templates?
2. Editing the Email Template
3. Configuring the form controls tab

IV. Module 4: Intermediate Process Timelines

A. Process Timeline Activity Types
1. Activity Types
    a. Setting Activity types
2. Notify Activity
3. Process Activity
4. Wait Activity
5. Custom Task Activity
6. End Process Activity

B. User Activity Advanced Options
1. Advanced Options Tab
    a. Activity is required to complete parent
    b. Require at least one user to be assigned and complete this task
    c. Assign task to first user to accept
    d. Assign Users to this task
    e. After a User Completes this Task
    f. Restart Users

Advanced Training

Approximate Length: 2.5 Hours

This course covers advanced Process Director operations, such as using synchronous and asynchronous subprocesses, managing the development, test and production cycle, advanced Form operations, and the use of the Goal object.

VII. Module 1: Processes
- A. Subproceses
  - 1. What is a Subprocess?
    - a. Synchronous vs. Asynchronous
  - 2. Subprocesses in Process Director
    - a. The Process Timeline Activity Type
    - b. The Run Process Custom Task
- B. Administering Process Instances
  - 1. Process Timeline Instances
  - 2. Accessing Process Timeline Instances
    - a. Administration/Timeline Tab
    - b. Timeline Instance Activity Properties
    - c. Restart and Rollback
  - 3. The Analyze Timeline View
- C. Troubleshooting Instances
  - 1. Timeline Errors
  - 2. Timelines in Error Knowledge View
  - 3. Configuration Errors
  - 4. Errors After Changing Existing Processes
    - a. Deleting a Timeline Activity
    - b. Adding a Timeline Activity
    - c. Adding a Form Field
    - d. Deleting a Form Field

VIII. Module 2: The Development, Test, and Production Cycle
- A. Importing/Exporting Content
  - 1. Development/Staging/Production Environments
  - 2. Content List Folders
    - a. Folder Structure for Applications
    - b. Folder Structure for Shared Objects
  - 3. Users and Groups

4. Import Errors
5. Export and Import Process
6. Complex Imports
   a. Import Order

B. Importing/Exporting other Objects
1. Users and Groups
2. Workspaces and Meta Data
3. Import Order

C. Managing Non-Importing Objects
1. What is a Non-Importing Object?
2. How Imports Work
3. Global Objects
4. Content List Organization

D. Permissions Methodology
1. What are Permissions?
2. Users
3. Children
4. Permission Types
5. Permissions Methodology
6. Delete Permissions
7. Permissive Access

E. Process Director Utilities
1. Overview
2. The BPImport Utility
3. The BPEmailImport Utility

IX. Module 3: Forms

A. Visibility/Enabling Scenarios
1. Scenarios
2. Control Hierarchy
3. When Controls Should be Edited
4. Initial Display Conditions
5. Sections with Approval Comments and Routing Slips
6. Setting Display Conditions
   a. Set Readonly Options
   b. Set Display Options

B. Transforming Forms to Print

1. Printed vs. Electronic Forms
2. Transformation Custom Tasks
   a. Transform Form to Word
   b. Transform Form to PDF

C. Attachment Handling
1. Attachments
   a. File System Storage
2. Attach Objects Control
3. Show Attached Objects Control

X. Module 4: Goals
I. Configuring Goals
A. Goals
B. Goal Actions
C. Configuring Goals
1. Properties Tab
2. Execution Options Tab

II. Handling Goal Results
A. Sample Goal Project
B. Running the Sample

Case Management Training

Approximate Length: 1 Hour

This course details the fundamentals of implementing applications that use Adaptive Case Management to build highly *ad hoc* or unstructured applications that enable users to create applications that combine the advantages of human collaboration and decision-making with the process automation of traditional BPM.

XI. Case Management Overview
A. BPM Assumptions
B. Case Assumptions
C. Case vs. BPM
D. Case Management
E. Case Architecture
F. When should you use Case?

XII. Implementing a Case Management Application
A. Case Management Application Components

B. Case Definition
C. Case Dashboard
D. Forms
E. Process Timelines
F. Knowledge Views
G. Conclusion

XIII. Case Definition Overview
A. Sample Case Management Application
B. The Case Definition
1. Configuration Tab
2. Properties Tab
a. Case Properties Section
b. Dashboards Section
C. The Sample Case Definition

XIV. The Sample Case Management Application
A. Sample Application Architecture
B. The Auto Claim Case Definition
C. Auto Claim Form
D. Claim # Dashboard
E. Manually Supplying Case Context
F. Claims Dashboard

XV. Application Walkthrough
A. Creating a New Case
B. Adjuster's Report
C. Repair Estimate
D. Summary

Advanced Design Concepts

Approximate Length: 8 Hours

This course covers the advanced principles of designing Process Director applications. This course assumes the student has completed the Core, Intermediate, Advanced, and Developing Applications training courses as a prerequisite. The student will be expected to apply knowledge from previous training courses to implement advanced concepts into an application's design without detailed instruction.

I. Module 1: Introduction to Advanced Design Concepts

- A. Designing Applications in Process Director
  - 1. Application Complexity
    - a. Multi-purpose application design
    - b. Results/conditions
    - c. Milestones/Journals
    - d. Approval Comments
    - e. Conditional Execution
    - f. Custom Form Display
    - g. Custom Validation
  - 2. Sample Application Overview
    - a. Requirements
    - b. Process Director Objects
      - (i) Forms
      - (ii) Timelines
      - (iii) Other Objects
    - c. Multi-Purpose Design Implications
- II. Module 2: Forms
  - A. Visibility/Enabling Scenarios
    - 1. Sample Application
    - 2. Enabling Scenarios
    - 3. Visibility Scenarios
    - 4. Conclusion
  - B. Date Calculations
    - 1. About Date Calculations
    - 2. The TimeOffSection Control
    - 3. Configuring the TimeOffSection
    - 4. Date Calculations
    - 5. Testing the Date Calculations
  - C. Using the Journal Control
    - 1. Journal Control
    - 2. Milestones
    - 3. Configuring a Milestone
      - a. Trigger
      - b. Milestone Group
      - c. Milestone Name
      - d. Icon

        e. Journal Entry
        f. Condition
      4. Configuring the Journal Control
        a. Title
        b. Scope
        c. Milestone Groups
        d. Height/Width
        e. Refresh Interval
        f. Allow/View User Comments
        g. User Comment Group Name
      5. Testing the Journal Control
    D. Custom Validation
      1. Form Validation
      2. Creating a Validation Rule
        a. Conditions
        b. Rule
        c. Message
        d. Form Field
      3. Testing the Validation Rule
      4. Special Validation
    E. Advanced Form Behaviors
      1. Form Completion
      2. Button Area
      3. Save Button
      4. Testing the Form
III. Module 3: Process Timelines
    A. Multi-Purpose Timelines
      1. Process Timeline Requirements
      2. Mapping the Process Timeline
    B. Setting Sequence Numbers
      1. The Sequence Number System Variable
      2. Implementing Sequence Numbers
      3. Testing the Sequence Number
    C. Creating an Approval Loop
      1. The Parent Activity and Looping
        a. Repeat Loop Until condition is met

        b. Jump back to the top of the loop when condition is met
        c. Cancel the remainder of the loop when condition is met
    2. Looping Scenario
    3. Configuring the loop
    4. Testing the Configuration
  D. Configuring Multipurpose Activities
    1. Multipurpose Activities
    2. Supervisor Approval Activity
        a. Approve Result
        b. Deny Result
        c. Reviewed Result
        d. Needed When Condition
        e. Task Instructions
        f. Configuration Review
    3. Manager Approval Activity
        a. Reviewed Result
        b. Internal Action Result
        c. Refer to HR Result
    4. HR Action Activity
    5. Testing the Configuration
    6. Final Note
IV. Module 4: Configuring Other Objects
  A. Email Templates
    1. Multipurpose Emails
    2. Configuring a Multipurpose Email Template
        a. The Notification Activity Type
        b. Additional considerations
    3. Configuring the Email Template
        a. Configuring the Template
        b. Setting Section Visibility Scenarios
        c. Email Template Conditions
    4. Adding the Notification to the Process Timeline
    5. Testing the Email Template
  B. Knowledge Views
    1. Multipurpose Knowledge Views
    2. Building the Knowledge View

a. Properties Tab
b. Options Tab
c. Columns Tab
d. Filter Tab
3. Testing the Knowledge View
4. Creating Other Knowledge Views

Reporting Training

Approximate Length: 2 Hours

This course provides report designers with training on how to perform advanced Knowledge View operations to create filtered reports for common reporting. For advanced reporting operations, this course covers the use of Process Director's built-in report writer, the Advanced Reporting Component, to create sophisticated reports and infographics using any information accessible from inside—and outside—of Process Director to create information-rich reporting and dashboard solutions.

I. Module 1: Knowledge View Reporting
   A. Using a Knowledge View in a Form
      1. Forms and Knowledge Views
      2. Reviewing a Sample Knowledge View Form
      3. Reviewing the Form's Knowledge View
      4. Designing the Form
      5. Configuring the Form Definition
   B. Passing Knowledge View Filter Values
      1. Knowledge View Parameters
      2. Parameterization with a Business Value
      3. Knowledge View URL Parameters
   C. Exporting Knowledge View Results
      1. Knowledge View Exporting
      2. Exporting to CSV
      3. Exporting to Excel
         a. The Excel Template
   D. Running a Process with Knowledge Views
      1. Knowledge Views and Processes
      2. Setting up the Lesson Materials
      3. Configuring the Knowledge View

4. Running the Knowledge View

II. Module 2: Advanced Reporting Component
   A. Introduction to Advanced Reporting
      1. The Advanced Reporting Component
      2. Creating a Report
         a. Dashboard
         b. Multi-Page
         c. Portlet
      3. Report Configuration
         a. Properties Tab
         b. Data Sources Tab
         c. Variables Tab
      4. The Report Designer
   B. Creating a Report
      1. Creating the Report Object
      2. Setting Report Properties
      3. Adding Report Objects
         a. Report Bands
         b. Adding Bands to the Report
         c. Configuring the Data Band
   C. Customizing a Report
      1. Customization Options
      2. Configuring the Group Band
      3. Adding a Function to the Report
      4. Adding Variables to the Report
   D. Alternate Data Source Example

System Administration Training

Approximate Length: 2 Hours

This course provides system Administrators with training on each aspect of administering a Process Director installation from the Built in Administrative console to Configure the system, manage users and groups, configure installation settings, and perform troubleshooting.

I. Module 1: Administrative Workspace Overview
   A. Administration Overview
      1. System Administration

- a. System Administrator
- b. Partition Administrator

2. The Admin Profile Workspace

II. Module 2: Configuration Section

A. Workspace Configuration

1. Configuration Section
2. What is a Workspace?
3. Creating a Workspace
4. Top Navigation Buttons
5. Home Page Windows
6. Advanced Options
7. Reviewing your Configuration
    a. URL Access to Workspaces
8. The Desktop Workspace

B. Partition Configuration

1. Partitions
2. Partition Page
3. Creating a Partition

C. Global Knowledge Views

1. What is a Global Knowledge View?
2. Creating a Global Knowledge View
3. Configuring a Global Knowledge View
    a. Advanced Options Tab
    b. Columns Tab
    c. Filter Tab
4. Importing Global Knowledge Views

D. Object Permissions

1. Permissions Report
2. Searching for Objects

III. Module 3: User Administration

A. Administering Users

1. User Authentication Types
    a. Built-In
    b. Windows Domain Security
    c. LDAP
    d. External

        2. Authentication
        3. User Organization
        4. Adding a New Built-In User
            a. Additional User Properties
        5. Deleting Users
    B. Administering Groups
        1. Groups
        2. Managing Groups
            a. Adding a New Group
            b. Other Group Management Options
    C. Authentication Settings
        1. Authentication Settings Page
    D. Delegation
        1. Delegating Tasks
        2. Delegation Page
            a. Standard Delegation
            b. Shared Delegation
            c. Shared Delegation Implementation
    E. User Directory Synchronization
        1. Active Directory
        2. Active Directory Sync Profiles
            a. Creating an AD Sync Profile
        3. Synchronization Issues
    F. User Permissions and References
        1. User Permissions
        2. User References
IV. Module 4: Installation Settings
    A. Properties
        1. Properties Page
    B. Global Variables
        1. Global Variables Page
        2. Available Settings
    C. Database Settings
        1. Database Settings Page
    D. Licensing
        1. Licensing Page

V. Module 5: Troubleshooting
   A. Server Control and System Information
      1. Troubleshooting Overview
      2. The Server Control Page
      3. The System Information Page
   B. Impersonation
      1. Impersonation Page
   C. Logging
      1. Logging Overview
      2. Audit Logs Page
      3. Logs Page
   D. Email Tests and Help
      1. Email Testing
      2. Run Email Tests Page
      3. Help

Securing Process Director

Approximate Length: 45 Minutes

This course describes the settings and best practices for administrators to enhance or customize the security of their Process Director installation.

I. User Authentication
   A. User Authentication Options
      1. Built-in
      2. Windows Domain Security
      3. Active Directory/LDAP
      4. External
   B. User Authentication Configuration
II. Federated Identity
   A. SAML Authentication
   B. Authentication Options
   C. Implementation Details
   D. Process Director Configuration Settings
      1. User Mappings
      2. Configuration

III. Permissions Methodology
   A. Permissions
      1. Users
      2. Children
   B. Permissions Methodology
      1. Attachments
      2. Timing
      3. Default Permissions
      4. Importing
      5. User Replacement
      6. End Users
      7. Form Visibility and Enabling
      8. Content List Locations
      9. Moving Objects
      10. Delete Permissions
   C. Permissive Access
IV. Securing Process Director
   A. System Security
   B. Cross Site Scripting Protection
   C. Properties Settings
      1. Interface URL
      2. Local IP Addresses
      3. Web Service Enabled
      4. Web Service Restrictions
   D. Custom Variable Settings
      1. Auditing Variables
      2. User Authentication Variables
      3. Testing Variables
   E. User Settings
   F. User Permissions Page
   G. Built-In User Authentication Options
   H. Audit Log Monitoring
   I. Content List Permissions
   J. Data Encryption

Permissions Methodology

Approximate Length: 30 Minutes

This course describes how to create, maintain, and administer a permissions methodology on Process Director systems.

I. Permissions Overview
   A. What are Permissions?
   B. User Permissions
   C. Object Permissions and Users
   D. How Permissions Work
      1. Permissions Tab
      2. How Permissions Rules Are Interpreted
      3. Object Types
      4. Inheritance
      5. Permissions Portability
   E. Conclusion
II. Setting Permissions
   A. Permissions Tab
   B. Editing Permissions
   C. Creating Permissions
      1. Permissions For Property
      2. Permissions to be Granted Property
      3. Adding the New Rule
   D. Replicating Permissions Changes
   E. Permission Exceptions
III. Permissions Methodology
   A. Initial Setup
      1. Production Servers
      2. Development Servers
   B. Setting Object Permissions
   C. Object Permissions Differences
   D. Importing/Exporting
   E. Administrative Users
   F. Deleting Objects
   G. Item Actions Custom Task
   H. User Replacement

I. Form Considerations
J. Moving Objects
K. Deny Permissions

Accessibility & Responsiveness

Approximate Length: 1.5 Hours

This course describes the basics of implementing accessibility and responsiveness features into Process Director applications. The course describes the common accessibility guidelines and how to implement them, including implementation that is built directly in to Process Director and work automatically, as well as those that are the responsibility of the designer. The course also covers what responsiveness is and provides guidance on some best practices for enhancing the product's built-in responsiveness features.

I. Module 1: Accessibility
    A. Accessibility Overview
        1. Accessibility and the Internet
        2. What is Web Accessibility?
        3. The Business Case for Accessibility
        4. Accessibility Benefits
        5. Legal Considerations
        6. Summary
    B. Accessibility Requirements
        1. Introduction
        2. Accessibility Guidelines
            a. Text Alternatives
            b. Info and Relationships
            c. Sensory Characteristics
            d. Orientation
            e. Identify Input Purpose
            f. Use of Color
            g. Color Contrast
            h. Resize Text
            i. Images of Text
            j. Reflow
            k. Non-text Contrast
            l. Text Spacing

m. Content on Hover or Focus
n. Keyboard
o. No Keyboard Trap
p. Timing Adjustable
q. Re-authenticating
r. Seizures and Physical Reactions (Three Flashes)
s. Page Titles
t. Link Purpose
u. Multiple Ways to Navigate
v. Descriptive Headings and Labels
w. Consistent Navigation
x. Error Identification
y. Field Labels or Instructions
z. Error Suggestions
aa. Error Prevention
bb. Help

C. Creating an Accessible Form
1. Overview
2. Creating the Form
3. Conclusion

II. Module 2: Responsiveness

A. Responsiveness and Process Director
1. What is Responsive Design?
2. Using CSS Styles on a Form
3. CSS Styles
4. Built-In Responsiveness

B. Creating a Simple Responsive Form
1. Creating the Form
2. Responsive Text Label
3. Table Refactoring
4. Image Sizing
5. Using HTML Controls for Complex Layouts
6. Conclusion

C. Using Bootstrap
1. What is Bootstrap?
2. Pre-Requisites

3. Creating a Simple Responsive Layout Form
    a. Container Controls
    b. Layout Controls
    c. Adding Rows and Columns
    d. Adding Form Controls
4. Testing the Form

D. Conclusion

Collaborative Document Features

Approximate Length: 1 Hour

This course is intended for users who will work with the Collaborative Document Features of Process Director. The course objectives are designed to provide students with the knowledge required to perform the basic operations of the Collaborative Document Markup and Collaborative Document Authoring components.

I. Collaborative Document Markup
  A. Introduction
  B. The Show Attached Objects Control
  C. The Collaborative Document Markup Editor
  D. Editor Toolbar
    1. Document/Navigation Tools
    2. View Controls Tool
  E. Annotation Tools
    1. Comment
    2. Freehand Tools
    3. Text tools
    4. Shape tools
    5. Signature
    6. Free Text
    7. Expansion dropdown
    8. Callout
    9. Stamp
  F. Keyboard Shortcuts
  G. Editing Annotations
  H. Saving Annotations

II. Collaborative Document Authoring

A. Introduction
B. The Show Attached Objects Control

Mobile Application Component

Approximate Length: 30 Minutes

This course is intended for users who will work with the Mobile Application Component of Process Director. The course objectives are designed to provide students with the knowledge required to perform the basic operations of the Mobile Application Component.

I. Creating Mobile Forms
   A. BP Logix Mobile Application
   B. Importing a Form into the Mobile Application
   C. Mobile Application
   D. Importing Form Instances Back into Process Director
II. Mobile Data Sources
   A. Importing Data Sources
   B. Applying a Data Source to a Screen

Using the Template Library

Approximate Length: 1 Hour

This course is designed to teach the basic operation of the Process Director Template L:ibrary feature.

I. Introduction to the Template Library
   A. Overview
      1. Template Library Folder
      2. Template Data Folder
   B. Application Templates
   C. Customization
II. Creating an Application from a Template
   A. Creating the Application
III. Customizing the New Application
   A. Overview
   B. General Architecture
   C. Customizing the Objects

1. Form Definition
2. Process Timeline
3. Other Objects

D. Bootstrap Forms

E. Conclusion

IV. Creating Your Own Templates

A. Overview

B. Creating the Objects

Workspaces and Dashboards

Approximate Length: 45 Minutes

This course is designed to teach the basic operation of Process Director Workspaces and Dashboard objects, and how to use them to create a custom UI for an application.

I. Workspaces

A. What is a Workspace?

B. Workspace User Interface

C. Managing Workspaces

1. Top Navigation Buttons Tab
2. Home Page Windows Tab

D. The Desktop Workspace

E. Workspace Organization

II. Dashboards

A. What is a Dashboard?

B. Configuring Dashboards

1. Properties Tab
2. Dashboard Definition Tab
3. Adding Dashboard Widgets
4. Widget Properties

C. Launching Forms in a Dashboard

III. Workspaces and Dashboards

A. Integrating Dashboards and Workspaces

B. Creating a Dashboard Workspace

User Assignment

Approximate Length: 45 Minutes

This course teaches the fundamentals of assigning Tasks to end users. It covers assignment methods, result handling, task restarts, and other advanced topics around user assignment.

I. User Assignment Basics
   A. User Activities and Tasks
   B. The User Activity Type
   C. Assigning Users
   D. Multiple-User Assignment
   E. When Task Assignment Occurs
II. Assignment Operations
   A. The 'How' Question
   B. Serial Assignment
   C. Group Member Assignment
      1. Round Robin Assignment
      2. 'Least Busy User' Assignments
      3. Self-Assignment
   D. Restarting Activities
      1. Restart Users
      2. Restart All Users When
III. Task Completion
   A. Default Completion
   B. Result Handling
   C. Parent Activity Loop
   D. Conditional Termination
      1. Consensus Results
      2. Conditional Results
      3. Completed When Conditions

REST Web Services

Prerequisites: Intermediate Training
Approximate Length: 1 Hour
Modules: 1

This course covers the fundamentals of REST Services, How REST Services work, how to handle data returned in both XML and JSON formats, JSONPath and XPath, and how to build Business Values that use REST data.

I. REST Web Services
   A. What is REST?
   B. The REST Request
   C. The REST Response
   D. JSON and XML Comparison
II. Using REST Services
   A. Business Values
      1. Rest Data Source Tab
      2. Business Value Properties
         a. XPath
         b. JSONPath
      3. Parameters
III. Building a REST Business Value
   A. REST Services Sample Application Reminder
   B. Introduction
      1. Form
      2. REST Service
   C. Building the Business Values
      1. JSON Data Business Value
      2. Properties
      3. Parameter
      4. Configuring the Form
   D. Parsing REST Responses
      1. JSON and JSONPath
      2. XML and XPath

Meta Data

Approximate Length: 1.5 Hours
This course covers the metadata features of Process Director and includes instructions on how to build a metadata taxonomy, exporting/importing metadata, and how to apply metadata to Process Director objects.

I. Metadata Overview
  A. What is Metadata?
  B. Power of Metadata
  C. Metadata Elements
  D. Some Caveats
  E. How Metadata is Applied
    1. Object Assignment
    2. Folder Assignment
    3. Instance Assignment
  F. Metadata Replication
II. Creating Metadata
  A. Manually Creating Metadata
    1. Metadata Categories
    2. Metadata Attributes
  B. Importing Metadata
  C. Use Case Example
    1. Where to Create Attributes
III. Applying Metadata
  A. Manually Applying Metadata
  B. Assigning Categories to Objects
    1. Meta Data Tab
    2. Form Field
  C. The Set Meta Data Custom Task
    1. Custom Task Example
IV. Metadata and Knowledge Views
  A. Category Navigation
  B. Using Category Navigation
  C. Filtering by Attribute

Stream Actions

Approximate Length: 1 Hour

This course covers how to create, schedule, and run Stream Actions to create processes from an external recordset on a manual or scheduled basis.

I. Stream Actions

A. Overview
B. How the Stream Action Works
C. Sample Application
   1. Project Organization
   2. Objective

II. Creating a Stream Action
   A. Pre-requisites
   B. Creating the Stream Action
   C. Configuring the Stream Action
      1. Properties Tab
      2. Data Set Tab
         a. SQL Data Source
         b. Business Value
      3. Start Process Tab
      4. Schedule Tab
   D. Conclusion