

# PROCESS DIRECTOR TRAINING

## TRAINING COURSE SYLLABI



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## Using the Litmos LMS

**Prerequisites:** None

**Approximate Length:** 0.25 hours

**Modules:** 1

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

Upon completion of this course, the student will be able to successfully:

- Define the terms “Course” and “Learning Path”.
- Understand the Learning Path the student needs.
- Self-signup for a learning Path.

## Introduction to Process Director

**Prerequisites:** None

**Approximate Length:** 30 minutes

**Modules:** 1

This course describes the fundamental concepts behind Process Director and provides a brief demonstration of a Process Director application. The course covers important terms associated with Business Process Management (BPM), and provides a general overview of how Process Director implements key BPM principles to enable non-programmers to develop sophisticated No-Code BPM applications.

Upon completion of this course, the student will be able to successfully:

- Define the term "Intelligent Automation".
- Describe the Intelligent Automation methodology.
- Describe the methods used to create and improve a process.
- Describe the basic components of a Process Director application.

## Introduction to Intelligent Automation

**Prerequisites:** Introduction to Process Director

**Approximate Length:** 1 Hour

**Modules:** 1

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

Upon completion of this course, the student will be able to successfully:

- Describe the basics of IA.
- Describe the IA methodologies for managing and improving processes.
- Describe the prerequisites for successfully implementing an IA initiative.
- Describe the steps needed to implement an IA Process automation project.

## Core Training

**Prerequisites:** Introduction to Process Director

**Approximate Length:** 5.5 Hours

**Modules:** 5

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. This course gives implementers who are not programmers the foundation they need to build BPM applications.

Upon completion of this course, the student will be able to successfully:

- Create and design a form, using the Online Form Designer.
- Use Process Director to configure Form fields, events, and conditions for a Form definition.
- Correctly create and configure a Process Timeline and Process Timeline activities to model a simple process.
- Create and a configure business rule to return a desired value.
- Create and configure a Knowledge View to return a desired set of objects that matches a desired set of conditions.

## Application Development

**Prerequisites:** Core Training

**Approximate Length:** 0.75 Hours

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Describe the four stages to develop applications.
- Describe how to create detailed requirements.
- Describe the best practices for developing applications.
- Describe the process for testing and gathering feedback.

## Intermediate Training

**Prerequisites:** Core Training

**Approximate Length:** 2.75 Hours

**Modules:** 4

This course builds on the knowledge learned in the Core training course to develop more complex applications without the need to write code. This course describes the use of Data Sources and Business Values to use external data in an application to implement more complex Form operations, how to create customized email templates, and more advanced Process Timeline configurations to change the operation of the Process Timeline based on internal or external conditions.

Upon completion of this course, the student will be able to successfully:

- Create and configure Business Values to access and use external data, then
- Use that external data to configure Form definition properties to customize your form's operation,
- Create Email Templates to use for notifications in your applications, and
- Configure Timeline Definition properties to customize your Process Timeline's operation.

## Advanced Training

**Prerequisites:** Intermediate Training

**Approximate Length:** 3.75 Hours

**Modules:** 4

This course covers advanced Process Director operations, such as using synchronous and asynchronous subprocesses, managing the development, test and production cycle, exporting and importing objects, creating a permissions methodology, advanced Form operations, and the use of the Goal object to create automated processes that can start autonomously based on any evaluable condition, such as changes to data outside of Process Director.

Upon completion of this course, the student will be able to successfully:

- Create and configure synchronous and asynchronous subprocesses and manage running processes.
- Perform common tasks in the Development, Testing, and Production cycle, to include importing and exporting applications between systems, and creating a permissions methodology.
- Implement Form operations like configuring visibility and enabling scenarios, transforming forms, and handling document attachments.
- Create and Configure Goal objects to automatically evaluate conditions and start processes on a scheduled basis.

## Case Management Training

**Prerequisites:** Advanced Training

**Approximate Length:** 1 Hour

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Understand the difference between Case Management and traditional BPM applications.
- Create a Case Object and its associated Workspaces.
- Design Case-based Forms and processes.

## Advanced Design Concepts

**Prerequisites:** Advanced Training, Developing Applications

**Approximate Length:** 8 Hours

**Modules:** 4

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.

Upon completion of this course, the student will be able to successfully:

- Describe the concepts behind multipurpose application design.
- Apply visibility and enabling scenarios to Form controls
- Perform a DateDiff calculation
- Create and display Milestones in a Journal control
- Create custom validation rules for a Form
- Implement a Save button on a form
- Use a Sequence Number system variable to create self-managing custom sequences
- Use a Parent activity to control the behavior of an approval process
- Configure Timeline Activities with multiple results that have visibility scenarios applied
- Configure a multipurpose email template
- Create a super search Knowledge View

## Reporting Training

**Prerequisites:** Intermediate Training

**Approximate Length:** 2 Hours

**Modules:** 2

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.

Upon completion of this course, the student will be able to successfully:

- Create and use parametrized Knowledge Views.
- Run processes on Knowledge View results.
- Export Knowledge View results to an Excel template.
- Create and configure reports using the Advanced Reporting Component.

## System Administration Training

**Prerequisites:** Introduction to Process Director

**Approximate Length:** 3.25 Hours

**Modules:** 5

This course provides system Administrators with training on every aspect of administering a Process Director installation from the built-in administrative console to configure the system, manage users and groups, create and manage user task delegation, synchronize users with

Active Directory, configure installation settings, investigate log files, and perform troubleshooting operations.

Upon completion of this course, the student will be able to successfully:

- Describe the main elements of the Process Director interface, including workspaces, menus, content lists, and portlets.
- Create and configure Workspaces, to include navigation and portlets.
- Create and configure partitions.
- Configure Authentication settings.
- Set Object Permissions
- Create and configure global Knowledge Views.
- Create and configure user accounts.
- Create and configure user groups.
- Configure and manage delegations.
- Create and manage profiles to synchronize with Active Directory.
- Create, Configure, and manage User permissions
- Configure Installation settings.
- Configure Global Variables.
- Create and configure Database Settings.
- Run email tests to ensure proper SMTP Configuration.
- Administer Process Director Process Timeline instances.
- Administer Process Director Workflow instances.
- Import and export Content List objects.

## Securing Process Director

**Prerequisites:** System Administration

**Approximate Length:** 45 Minutes

**Modules:** 1

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

Upon completion of this course, the student will be able to successfully:

- Describe the user authentication models.
- Describe important Security Settings

# Permissions Methodology

**Prerequisites:** System Administration

**Approximate Length:** 30 Minutes

**Modules:** 1

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

Upon completion of this course, the student will be able to successfully:

- Set permissions on a Process Director Object.
- Describe basic principles for setting permissions.

# Accessibility & Responsiveness

**Prerequisites:** Advanced Training

**Approximate Length:** 1.5 Hours

**Modules:** 2

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.

Upon completion of this course, the student will be able to successfully:

- Understand the basic accessibility guidelines.
- Build a simple accessible form.
- Understand the basics of responsive design.
- Create a simple responsive Form.

# Collaborative Document Features

**Prerequisites:** Advanced Training

**Approximate Length:** 1 Hour

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Use Process Director to create and save a shared markup document.
- Use Process Director to collaboratively edit a shared document.

## Mobile Application Component

**Prerequisites:** Core Training

**Approximate Length:** 30 Minutes

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Import a Process Director form into the Mobile Server.
- Import a Data Source into the Mobile Server.
- Apply a data Source to a form Dropdown field.

## Using the Template Library

**Prerequisites:** Core Training

**Approximate Length:** 1 Hour

**Modules:** 1

This course is designed to teach the basic operation of the Process Director Template Library feature.

Upon completion of this course, the student will be able to successfully:

- Describe the purpose of the Template Library.
- Create a new application shell using the Template Library.
- Create a simple application template.

## Workspaces and Dashboards

**Prerequisites:** Core Training

**Approximate Length:** 45 Minutes

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Create and configure a Dashboard Definition
- Create a Workspace that displays a Dashboard as the Workspace Home Page

## User Assignment

**Prerequisites:** Core Training

**Approximate Length:** 45 Minutes

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Describe the methods for selecting Users for Task Assignment
- Describe the methods for determining how Task assignment will work.
- Describe the methods for completing Tasks.

## 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.

Upon completion of this course, the student will be able to successfully:

- Describe the basic concepts of REST Web Services.
- Describe the basic principles of using REST Services that return XML or JSON data.
- Build a REST Business Value and use it in a Form definition.

# Meta Data

**Prerequisites:** Intermediate Training

**Approximate Length:** 1.5 Hours

**Modules:** 1

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.

Upon completion of this course, the student will be able to successfully:

- Describe the purpose and use of metadata.
- Create a metadata taxonomy.
- Apply metadata to Process Director objects.
- Construct a Knowledge View that uses metadata to filter results.

# Stream Actions

**Prerequisites:** Intermediate Training

**Approximate Length:** 1 Hour

**Modules:** 1

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

Upon completion of this course, the student will be able to successfully:

- Describe the basic concepts of Stream Actions.
- Create and run a Stream Actions object.