

AA301: Accelerated Application Administration

AA301 is an abbreviated 4-day course combining the salient topics from ADM101, ADM201, REX101, and TPRM201, appropriate for new admins with less time or who are unlikely available to attend multiple ProcessUnity training events. More focus is given to lecture and product demos, with less time for deep dives and hands-on work.

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** through formal curriculum, demos, quizzes, and classroom discussion – catered lunches daily.
- **Individual training environments** for completing individual 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 AA301. 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.

	ADM101	ADM201	REX101	TPRM201	AA301
Course Focus:	Heavy	Moderate	Light		
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

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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

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)

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)

12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #1: Intro to ProcessUnity**

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

Topic 7 – 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 #2: Properties

Topic 8 – 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

Topic 9 – 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 #3: Importing Users / TPs

5:30pm End of Day 1

6:30pm -7:30pm Happy Hour

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Day 2

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

Topic 10 – Properties / Advanced Features: Explore the common but advanced features of property configuration.

- Relationship Properties / Advanced Picklist Search
- View Access / Read Only / Hide in Edit Mode
- Formatting / Color Coding / Validation Rules
- Auto Update Rules / Event Types / Run Now
- Value on Copy/Paste
- Special Properties: [Name], [ID], [External ID]
- [Search Keywords] / [Item Last Modified]
- Bulk Property Update
- Save Sequence Processing
- **Lab #4: Advanced Property Configuration**

Topic 11 – Notifications & Workflow: Email-based notifications, the ProcessUnity Inbox, and various built-in workflow features.

- Notification Rules / Defining Events
- Custom Email Notifications / The ProcessUnity Inbox
- Dialog (running commentary)
- Stateful Objects / Version Control / Review & Approval
- **Lab #5: Notification Rules**

Topic 12 – Workflow Steps & Events: The common building blocks of configurable workflow used in Buttons, Report Actions, and Automated Actions.

- Workflow Overview
- Triggers & Expression-based Events
- The library of available Step Types
- Steps that Push & Pull
- Understanding [ButtonActionLastID]

12:30pm Break

- Onsite Lunch / Additional Lab Time

Topic 13 – Custom Buttons: Configuring custom buttons and actions to streamline workflow and increase user adoption.

- Intro to Buttons / What are they
- Creating & Configuring Buttons
- Permissions / Conditional Display & Enablement
- Benefits / Use Cases / Concepts & Ideas
- **Lab #6: Custom Buttons**

Topic 14: Report Actions: Taking button workflow to the next level by processing multiple records at a time as defined in a custom report.

- Intro to Report Actions / Filtered Report Scope
- Permissions / Conditional Display & Enablement
- Forms / Steps / Bulk Delete
- Bulk MS Word Template Generation
- **Lab #7: Report Actions**

Topic 15 – Automated Actions: Hands-off workflow to execute actions automatically based on customer-defined events.

- Intro to Automated Actions / What are they
- Enabling Automated Actions
- Use Cases / Best Practices

5:30pm End of Day 2

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Day 3

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

Topic 16 – Sandbox Operations: Understanding all aspects of using sandbox instance(s) alongside your Prod environment.

- Sandbox Refresh
- Configuration Change Control (Check Out/In)
- Broadcast Messaging / Custom Maintenance Windows

Topic 17 – Infrastructure Topics: A look at ProcessUnity’s architecture, data model, nightly processing, and more.

- Object Model / Backup & Restore
- Nightly Processing / Instance Time Zone
- Cloud Hosting / SSO / LUAP

Topic 18 – Integration & Automation: An intro to automated batch processing, command line, scheduling options, web services & connectors.

- Overview of Integration & Automation
- Special Web Pages for Import/Export
- cURL & PowerShell Scripting / Scheduling Jobs
- Intro to Web Services API / Swagger / Tokens

Topic 19 – Introduction to Custom Reporting: Before you can build quality reports, understand object design / source data. Envision your needs and begin with the end in mind.

- ProcessUnity Data Model / Data Relationships
- Configuration Best Practices
- ProcessUnity vs. Business Intelligence Reporting Tools

Topic 20 – Invoking Reports: Finding, running, and interacting with ProcessUnity reports in their various formats.

- Report Types (Std / Custom / Context / Dashboard)
- Custom Report Walkthrough / Report Structure
- Levels vs. Groups / Detail Rows
- Interactive Filtering / Report Toolbar / Drilldown
- Exporting Report Data
- Using Reports for Navigation
- Performance Considerations / Data Volume

12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #8: Getting Familiar with Reports**

Topic 21 – Building Reports: Part 1: Step-by-step method.

- Creating a Custom Report / Levels
- Adding Columns / Grouping / Sorting
- Colum Formatting / Drilldown

Topic 22 – Building Reports: Part 2: Secondary features.

- Adding Calculated Columns
- Column Formatting / Color Coding
- General Report-Level Options
- “Automatic Refresh” (Realtime vs. Cached data)

Topic 23 – Report Filtering: Applying data filters to Custom Reports for enhanced performance and interactive flexibility.

- Design-Time Filters vs. Run-Time Filters
- Positive vs. Negative Filters (Performance Tips)
- Run Time Filter Types (pre/post)
- Filter Examples / Best Practices / Tips for High Volume

Topic 24 – Report Sharing / Publishing: Share reports with others by publishing them to task groups, or as context reports.

- Report Ownership / Defaults
- Sharing Reports (“Publishing”) to Roles/Teams
- Context Reports (Reports Tab) / Automatic Filtering
- Portal Reports / Automatic Filtering

Lab #9: Advanced Reporting / Filtering / Publishing

Topic 25 – Charting: Techniques for adding charts to reports.

- Visualizing Data with Charts / Groups and Totals
- Single-series Charts (Pie, bar, column...)
- Multi-series Charts (Stacked column, bar, area...)
- Table Charts (list, summary)
- Gauges / Number Boxes / Geographical Maps

Topic 26 – Custom Dashboards: Custom Dashboard capabilities, adding charts, and interacting with the data.

- Personal vs. Custom (Shared) Dashboards
- Dashboard layout / Adding Components
- Copying and Publishing Dashboards

Lab #10: Charting / Dashboards

5:30pm End of Day 3

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Day 4

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

Topic 27 – Intro to Expression Writing: Understand the details and techniques of expression writing in ProcessUnity.

- Intro / Comparisons to MS Excel Formula writing
- Expression Language / Output Types / Syntax
- Expression Examples to gain Familiarity

Topic 28 – Intro to Functions: What are functions, how are they used. A dive into the ProcessUnity Function toolkit.

- Intro to Functions / Function Signature
- Function Outputs / Nested Functions
- Syntax Awareness / Finding Syntax Errors

Topic 29 – Spotlight: IF/CASE/CASEX: A summary of the big three (often interchangeable) conditional functions and best practices for their usage.

- Examples / Differentiators / Usage Best Practices

Topic 30 – Logical Expressions: Most expressions that an admin will write are those that return (true/false) values.

- Exploring Logical Functions
- Logical Operators / Truth Tables
- Using Logical Expressions / Common Examples

Topic 31 – Date Math: A summary of useful date functions to automate your program.

- Date Functions / Business-day Aware calculations
- Spotlight: NEXTSCHEDULEDATE

12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #11: Expression Writing 101**

Topic 32 – Questionnaire Templates: building custom questionnaires with conditionality and scoring.

- Designing questions/sections for best results
- Response types, comment entry, attachments
- Conditional questions and sections
- Scoring of questions, sections, domains
- Implementing “Preferred Responses”
- Question to Property Linking (benefits/tactics)
- Versioning / Retiring / serializing questionnaires
- SIG Connector – template and response import
- **Lab #12: Building Questionnaires**

Topic 33 – Third-Party Database: Review services, facilities, 4th parties, agreements objects and key properties of each object.

- Nomenclature (Vendors, Third Parties, Suppliers, etc.)
- Services / Facilities / Vendor Contacts / ...more
- Scaling your program using Custom Objects
- Third-Party Content Ecosystem / Connectors

Topic 34 – Third-Party Onboarding: Build your request process into an efficient gating exercise and vendor master search.

- Configuring a Third-Party master search on Request
- Set up gating / inherent risk questions
- Immediately flag incomplete/inconsistent requests
- Automating Inherent Risk (ratings/scores)

Topic 35 – Assessments: Dynamically scope due diligence, manage external and internal workflow, reviewing risk scoring and ratings.

- Intro to Assessments – Lifecycle, statuses, workflow
- Dynamic Scoping – various methods
- Pre-Populating Responses – execution, why and when

Topic 36 – Bulk Assessments: An overview and execution steps to kicking off bulk assessments.

- Determining population of assessment recipients
- Using Report Actions (and other methods) to kick off

Topic 37 – Third-Party’s Experience: Navigate the Portal to see how external third-party contacts interact with ProcessUnity.

- Portal Overview / Help System
- Questionnaire / Delegation / Submit / Importing
- Portal Tasks (Profile, Files, Dialog, Reports)

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Topic 38 – Assessment Review & Remediation: Techniques to review submitted questionnaire responses (answers, comments, attachments), identify non-preferred responses, and triggering remediation workflow.

- Assessment Review Process
- Preferred Response evaluation, Pass/Fail
- Follow-up Workflow
- Issue/Findings – creation and resolution
- Closing the Assessment

Topic 39 – Multi-Language Portal: Configuring the portal environment for non-English external contacts.

- Available language packs
- Configuring questionnaires by language
- Configuring notifications by language
- Configuring languages by person / Login Language Bar

Lab #13: Assessments / Portal

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 4

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.

www.processunity.com/training | training@processunity.com

978.451.7655

33 Bradford Street | Concord, MA 01742 | United States