

ADM201: Advanced Application Administration

ADM201 is a deep-dive course for admins who are confident with the basics and are ready for advanced configuration, specifically focused on more sophisticated property configuration, workflow (buttons, report actions, and automated actions), the Microsoft connectors (Word, Excel), integrations, sandbox usage, conf change control, the ProcessUnity Connector, and more (solution agnostic).

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

- It is recommended that attendees are **proficient** with **basic administration topics** (i.e. **ADM101** or similar experience) before attending. This course is intended for admins who wish to dive deeper into platform config and workflow topics.
- Attendees who are **hands-on, detail-oriented, organized, and inquisitive** with any proficiency/comfort using **MS Excel** will thrive as a ProcessUnity admin.

Course Focus:

Heavy
 Moderate
 Light

	ADM101	ADM201	REX101	TPRM201	AA301
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 – Basic Admin Recap: Review the introductory topics of app administration to set the stage for deeper dive topics.

- Details Tab / Related Items
- Properties / Basic Property Configuration
- Calculated & Aggregate Properties
- Import Templates / Custom Reports
- Roles and Permissions / Data Security

Topic 2 – Intro to Expression Writing: Briefly explore the use cases and building blocks of writing expressions across the system.

- What are Expressions?
- Expression Output Types
- Building Blocks of Expressions
- Intro to Functions
- Expression Language / Examples
- Using Emojis / Icons
- **Lab #1: Expression Writing Basics**

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Topic 3 – 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 #2: Advanced Property Config**

Topic 4 – Owner View / Owner Edit: Understanding record ownership related to Role restrictions and ownership.

- Role Switches to restrict Record Ownership
- “Participate in Ownership” property attribute
- Data Access Restrictions – Access Tab

12:30pm Break

- Onsite Lunch / Additional Lab Time

Topic 5 – 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

Group Project (A) Advanced Notifications: Work with a partner to collaboratively implement a real-life (deep dive) project.

- **Advanced Notifications on data changes, deadlines**
- **Variable Email Subject/Body text**
- **Recipients / Conditional Recipients**
- **Manager Escalations**

5:30pm End of Day 1

6:30pm -7:30pm Happy Hour

Day 2

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

Topic 6 – 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]

Topic 7 – 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 #3: Custom Buttons**

Topic 8: 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

12:30pm Break

- Onsite Lunch / Additional Lab Time
- **Lab #4: Report Actions**

Topic 9 – 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

Topic 10 – Application & My Organization: An intro to these high-level objects for program level workflow & summary data.

- “Application” vs. “My Organization” objects
- Aggregate Property Trending / Global Variables

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Topic 11 – ProcessUnity Connector: An intro to ProcessUnity’s capabilities to run workflow across instance boundaries.

- What is the ProcessUnity Connector?
- Remote Connections / Grant & Accept
- Configuring and running Remote Steps

Group Project (B) Workflow: Work with a partner to collaboratively implement a real-life (deep dive) project.

- Workflow (status change Button workflow)
- Identify & Bulk Delete Duplicate Data (Report Actions)

5:30pm End of Day 2

Day 3

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

Topic 12 – Microsoft Excel® Connector: A review of the robust import/export capabilities using the Microsoft Excel add-on.

- Enabling / Installing Excel Connector
- Excel Pull (Custom Reports) / Filtering via Excel
- Excel Push (Import Templates)
- **Lab #5: MS Excel® Connector**

Topic 13 – Microsoft Word® Connector: An overview of single-click generation of Microsoft Word docs via reports using customer supplied templates.

- Microsoft Word Document Templates (.DOTX)
- Microsoft Word Content Controls
- Adding Word Templates to ProcessUnity
- Generating Word Documents / Templates Tab
- **Lab #6: MS Word® Connector**

Topic 14 – 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

12:30pm Break

- Onsite Lunch / Additional Lab Time

Topic 15 – 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 16 – 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

Group Project (C) Sandboxes: Work with a partner to collaboratively implement a real-life (deep dive) project.

- Configuration Changes via Sandbox (Check Out)
- Broadcast Messaging / Lockout / Check In

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 3

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.

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