

## Process360 Developers Program

<b>Suitable for:</b>	Developers, designers, coders and programmers
<b>Product:</b>	Process360
<b>Course length:</b>	4 days instructor-led learning; 1 day computer-based training

# Process360 Developers Program

## Program Description

Students undertaking the **Process360 Developers** training program learn how to create, test and build a Process360 solution; create workflow processes; configure fundamental tasks and validate and build workflows. Students additionally learn how to use Process360 administration tools to create supporting workflow objects and configure user interfaces using Process360's out of the box components.

## Program Structure

- » Introduction to Process360 (1/2 day computer-based learning).
- » Process360 Developer Foundation (1/2 day computer-based learning).
- » Process360 Developer Essentials (4 days instructor-led training).

All students begin their education program with Introduction to Process360. This computer-based course provides students with a high-level overview of the capabilities of the Process360 software suite

Following Introduction to Process360, students progress to Process360 Developer Foundation - a computer-based course that introduces key technical concepts prior to the Process360 Developer Essentials instructor-led class.

## Learning Objectives

- » To introduce Persona-based BPM and its unique approach to BPM.
- » To provide students with an overview of the tools built into the Process360 suite.
- » To provide students with an understanding of the collaborative nature of process development and advisability of use cases.
- » To provide students with a high-level understanding of Process360 Architecture.
- » To enable students to use designerView to create, define and build process maps.
- » To provide students with an understanding of Process360's process tasks and the ability to configure the most commonly used tasks.
- » To enable students to build user applications (userViews) using Pocess360's out of the box components.

## Prerequisites

- » Experience in a technical development role; experience in application configuration.
- » Familiarity with the business processes addressed by their Process360 system.

## I. Introduction to Process360 Agenda

### Introduction

- » The common challenges businesses face today
- » The Process360 as BPM solution suite
- » Persona-based BPM
- » The Continuous Process Improvement cycle
- » The 360 Degree Approach as Global 360's successfully proven approach to BPM

### Product Overview

- » Overview
  - Document & Information Management
  - Case Processing
  - Process Management
  - Business & Integration Services
- » Capture, content and storage
- » Process360 user interface tools
  - Process360 viewParts
  - Dashboard Web Parts
  - Forms Designer

### Builder Persona: Analyst

- » The role of the business analyst in the Builder persona
- » Insight360 Process Designer
- » Pre-deployment simulation
- » XPD export from Insight360 Process Designer for use in designerView
- » Insight360 Process Designer simulation capabilities

### Builder Persona: Developer - designerView Basics

- » Overview of designerView
- » Basic navigation on designerView
- » Process maps
- » Submaps
- » Tasks and task categories
- » Routes
- » Validating maps
- » The Build process

## I. Introduction to Process360 Agenda (cont.)

### The Builder Persona: Administrator - adminView Basics

- » Overview of adminView
- » Workspaces
- » Users, logins and profiles
- » designerView integration with adminView
- » Tools
  - Worklist Tool
  - Database Tool

### Participant Persona

- » Understand typical participants and their typical jobs
- » Data Entry
- » Processor
- » SharePoint & ASP.Net out of the box Participant interfaces
  - userViews
  - web parts
  - viewParts
- » viewParts overview
  - Current Workload
  - My Inbox
  - Document viewer
  - CaseList Editor
  - Attributes Editor
  - Notes Editor

### Manager Persona

- » The difference between the Manager and the Participant Personas
- » The Supervisor Role
- » Manager viewParts
  - Team Status
  - Assignment Management
  - Worklist Management
  - Worklist search
- » Integration with Insight360

## II. Process360 Developer Foundation Agenda

Introduction to Process Design
<ul style="list-style-type: none"><li>» Process development as a collaborative process</li><li>» Use-cases &amp; G360 methodology for process development</li></ul>
Process Basics
<ul style="list-style-type: none"><li>» High level architecture of Process360</li><li>» How to get work into a process</li><li>» Start Tasks– Scan, InfoPath, Office In</li><li>» Workpackets &amp; Workpacket components</li><li>» viewParts &amp; building the human interface to a workpacket</li><li>» Workpackets &amp; archiving &amp; retrieval</li></ul>
Designing Process Flow
<ul style="list-style-type: none"><li>» Working with designerView &amp; workspaces</li><li>» Building a map</li><li>» Working With Submaps &amp; process flow</li><li>» Documentation features</li></ul>
Data Models/Repositories
<ul style="list-style-type: none"><li>» The purpose of the Repository</li><li>» Repository-specific Tasks</li><li>» Best practice for data model design</li><li>» Fields/attributes</li><li>» Templates</li><li>» Usage Types</li></ul>
Process and Data Model Alignment
<ul style="list-style-type: none"><li>» Start Tasks– Scan, InfoPath, Office In configuration</li><li>» Decision task configuration</li><li>» Goto Route task configuration</li><li>» Worklist task configuration</li><li>» Archive task configuration</li></ul>

## II. Process360 Developer Foundation Agenda (cont.)

Runtime Processing
<ul style="list-style-type: none"><li>» Process Agents</li><li>» Moving work through the workflow</li><li>» Scan Manager</li><li>» Using Office applications</li><li>» Using InfoPath forms</li><li>» Using Worklists</li></ul>
Troubleshooting
<ul style="list-style-type: none"><li>» Process Agent Logs</li><li>» Changing the Process Agent log level</li><li>» Using the adminView database tool</li></ul>
Finishing a Process
<ul style="list-style-type: none"><li>» Long Term Storage</li><li>» Partitions</li><li>» The Archive Process</li></ul>

### III. Process360 Developer Essentials Agenda

#### Building the Process Map

- » Working from a Flowchart or Insight360
- » Working with Workspaces
- » Functional purpose of Workspaces
- » Setting up a Workspace
- » Setting up a Workspace administrator
- » Start tasks
  - Scan in
  - Office in
- » Application Tasks
  - Worklist
  - Application Node
  - Set Data
- » Flow Control Tasks
  - Decision tasks (setting labels)
  - Submaps
  - Start Node Task
  - Go To Route Task
  - Insert Route Task
  - End Node Task
- » Archive Task
- » Documentation
  - Process Documentation
  - Task Descriptions
- » Validation
- » Task routing
- » Workpackets

### III. Process360 Developer Essentials Agenda (cont.)

#### Building the Data Structures

- » The Data Model
  - Catalogs
  - Templates
  - Usage Types
  - Worklists
- » Creating the Data Model
  - Requirements gathering
  - Field Definitions
  - Templates
  - Worklists
- » Creating the Repository
  - Libraries & Partitions
  - Catalogs
  - Usage types
  - Scheduled Archive Process
- » Configuring Process Flow
  - Create Input and Output components
  - Scan manager introduction
  - Creating a Batch in adminView
- » Scanning & Scan Manager
  - Scanning in Batches
  - Document Characteristics and the Batch
  - Batch Settings
  - Scanner Settings
  - Input Strategies
  - Scanning Strategy 1
  - Scanning Strategy 2
  - Scanning Strategy 3
  - Bar Codes and Bar Code Sheets
  - Types of Scan Codes
  - Default Bar Codes
  - Defining Non-Default Bar Codes
  - Performing Quality Assurance
  - Rescanning

### III. Process360 Developer Essentials Agenda (cont.)

- » Configuring Decision tasks
  - Decision Task for Branching Workflows
  - Decision Task and If-Then-Else-If Logic
  - Decision Task Conditions
  - Decision Task Components
  - Defining Decision Conditions
  - Logical AND and OR
  - Debugging Decision Tasks

#### userViews

- » how userViews are structured in SharePoint
- » Creating an application library
- » Understanding the Web part page templates
- » Application managers
- » Creating the userView hierarchy
- » Linking Pages together
- » configuring Page Properties
- » adding viewParts
- » Quick-guide to viewParts
- » Adding Buttons
  - Linking to attributes
- » Wiring up the Web parts
  - Creating event handlers
- » Modifying web part layouts
  - Chrome
  - Size

### III. Process360 Developer Essentials Agenda (cont.)

#### Further Workflow configuration

- » Configuring Set data tasks
- » Custom Script task
- » To Do List task
  - Create To Do List task in adminView
  - Configure task in designerView
- » The Workpacket model
- » Using Custom Script to copy folder attributes from a document to a folder
- » Reviewing scanned documents
  - Document Review Application
- » Security
- » P360 Security Model
- » Workspace recap
- » Profiles:
  - example profile definition
  - profile filters
- » Users
  - Work Qualifiers
- » Groups
- » Admin Access
- » LDAP Integration
- » Unified & Automatic Login

#### Getting Work Into a Workflow - InfoPath & OfficeIn

- » Introduction to InfoPath
- » InfoPath deployment
- » Process360 InfoPath integration:
  - InfoPath Import vs. InfoPath Update
- » Form Design
- » Form Submission
- » Form create
- » Form Update Task
- » MSOffice Integration
- » Configuring OfficeIn task

### III. Process360 Developer Essentials Agenda (cont.)

#### Archiving

- » Library & Repository
  - Partition vs. Storage Media
- » Archive Process
- » Partition Definition & Storage Options
- » Archive Task configuration options