

"Bpm'online customization and administration" training program

Target audience: The training program is intended for users familiar with the bpm'online products, CRM coordinators and system administrators, who need in-depth theoretical and practical skills in the configuration and administration of the system and business processes.

Training summary: Participants will learn how to prepare the system for the commercial operation: enter lookups, import data from other systems and databases, set up new fields, details and sections. Participants will also learn how to license users, work with administrative tools, configure access rights, create workplaces, configure new printables and create new business processes.

The program also includes an introduction to the bpm'online architecture. The training takes place over 3 days with a total of 3-4 hours per session.

Training program

| Time | Subject |
|---------------------|---|
| Day 1 | |
| 11:00 AM – 11:15 AM | Initial Customization Corporate logo and color scheme |
| 11:15 AM– 12:00 PM | System users and access rights <ul style="list-style-type: none"> • License management • Users management <ul style="list-style-type: none"> ○ Adding new users ○ Identifying users ○ LDAP synchronization features • Forming organizational structure of user roles Adding new sections • Setting up default access rights <ul style="list-style-type: none"> ○ Limiting user roles to view/change/add/delete data ○ Restricting user access to records in sections. ○ Controlling access to view or change section fields • How to use functional roles • How to use event-driven access rights • Configuring workplaces for different user roles |
| 12:00 PM – 12:10 PM | Break |
| 12:10 PM – 1:10 PM | Sections and details <ul style="list-style-type: none"> • How to use the section wizard • How to use the detail wizard • Setting up the mobile application wizard Configuring additional access rights for the mobile application |
| 1:10 PM – 2:30 PM | Initial system data population <ul style="list-style-type: none"> • Lookups setup • Initial data population <ul style="list-style-type: none"> ○ Importing accounts and contacts ○ Importing lookup |

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|---------------------|---|
| Day 2 | |
| 11:00 AM – 11:40 AM | "System architecture" presentation <ul style="list-style-type: none"> • Structure • Installation diagrams • Hierarchy • Packages Workspaces • Data and cache storage |
| 11:40 AM – 12:20 PM | Additional configuration and administration tools <ul style="list-style-type: none"> • Operation access rights management • Logging user actions • Configuring the audit log • System settings |
| 12:20 PM – 12:30 PM | Setting up MS Word printables <ul style="list-style-type: none"> • Installing the bpm'online plug-in for MS Word • Registering a new printable • Setting up the MS Word printable template |

| 12:30 PM – 12:40 PM | | Break |
|---------------------|---|-------|
| 12:40 PM – 1:40 PM | Integration setup <ul style="list-style-type: none"> • Email providers setup <ul style="list-style-type: none"> ○ Integration with email providers via IMAP/SMTP ○ Adding user email accounts ○ Integration with MS Exchange ○ Integration with Google | |
| 1:40 PM – 2:30 PM | Initial section setup <ul style="list-style-type: none"> • Default record lists • Folders • Analytics setup | |

| Time | Subject |
|---------------------|---|
| Day 3 | |
| 11:00 AM – 12:00 PM | Business processes <ul style="list-style-type: none"> • Using business processes in bpm'online products • "Introduction to BPMN notation" presentation • Examples and capabilities of bpm'online business processes Dynamic Case Management |
| 12:00 PM – 2:00 PM | Workshop on building new business processes Participants will create two new business processes (a simple one and an event-driven one), in which the most often-used items and customer tasks realization practices will be implemented. Participants will learn how to create automatic tasks, invoices, notifications, send emails using templates, manage access rights and how to work with the process log, designed to control the execution and debugging of business processes. |