

«Bpm'online administration and customization» guided learning programme

Target audience: This guided learning course is intended for implementation consultants, CRM coordinators, business analysts and other users that are familiar with any bpm'online product at end-user level and are looking to learn more about its customization capabilities.

What to expect: The participants will take part in a variety of learning courses on all topics listed below. Additionally, they will be able to apply their knowledge by completing practical assignments with the help of our trainer.

The participant must successfully complete the required e-learning courses before starting their guided learning.

Time	Topic	Required e-learning courses
Day 1. Analytics, users and import		
1,5 hours	Setting up columns, dynamic groups and analytics A variety of tasks related to system objects and their connections.	BPM'ONLINE BASICS OBJECT DATA MODEL
30 minutes	Managing users and the organizational structure Bpm'online user administration and management.	USER MANAGEMENT
30 minutes	Importing data from Excel Data import from Excel using the built-in utility.	

Time	Topic	Required e-learning courses
Day 2. Wizards and the content designer		
1 hour	Section wizard Using the section wizard to create and edit sections.	SECTION WIZARD
1 hour	Detail wizard Using the detail wizard to create and edit details.	DETAIL WIZARD
20 minutes	Content designer Using the content designer to create and edit email templates.	

Time	Topic	Required e-learning courses
Day 3. Access permissions, printables, introduction to business processes		
1 hour	Setting up access permissions to objects and operations Access permissions to objects, sections and operations. Inheritance of access permissions.	ACCESS PERMISSIONS
1 hour	Printables Setting up printables using the MS Word plugin.	
30 minutes	Business process designer basics The basics. Examples of simple business processes.	INTRODUCTION TO BUSINESS PROCESSES MODELING YOUR FIRST PROCESS

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Time	Topic	Required e-learning courses
Day 4. Processes and cases		
1 hour	Case management Creating cases. Various use examples in sections.	CASE MANAGEMENT
1 hour	Business processes Extended capabilities of the process designer. Common examples of practical use.	BUSINESS PROCESSES COURSE
30 minutes	Case management + Business processes Examples of using business processes in cases. Connecting processes and cases.	