

101 Metastorm BPM® 7.6 Foundation



Course Syllabus

Important Facts:	<p>5 days</p> <p>50% Lecture/Demonstration</p> <p>50% Hands-on Exercises</p>
Target Audience:	<p>This course has dual target audiences. Day 1 is targeted for Process Analysts responsible for designing a MBPM application which automates a process. Days 1 – 5 are targeted for Process Developers responsible for developing a MBPM application which automates a process. Note that Day 1 of this course is equivalent to our 1-day 100 MBPM Overview course.</p>
Class Objectives:	<p>Day1</p> <p>After completion of the first day of class, the student will have a good level of familiarity with the User Interface of the Metastorm BPM Designer and be able to use it to create process diagrams. In addition they will be able to describe core Metastorm BPM principles, enabling them to effectively communicate with Metastorm BPM developers.</p> <p>Specific outcomes include:</p> <ul style="list-style-type: none">• Ability to articulate Metastorm BPM foundation concepts• Ability to present and explain a Metastorm BPM design to end-users• Ability to create graphical representations of ideal business processes, including process forms and role requirements. <p>Days1-5</p> <p>After completion of the full five days of material, the student will have a good level of hands-on development experience with the Metastorm BPM Designer, obtaining the necessary skills to develop a business process application using Metastorm BPM.</p> <p>Specific outcomes include:</p> <ul style="list-style-type: none">• Ability to properly leverage the system architecture of the Metastorm BPM production and development environments• Ability to develop complete Metastorm BPM applications• Ability to integrate Metastorm BPM with external databases• Ability to utilize troubleshooting procedures in the design process

Prerequisites:

Experience in using windows-based software products and an understanding of business process analysis is required. An understanding of fundamental database concepts (table structure, primary keys, referential integrity, and normalization) and a working knowledge level of SQL statements (SELECT, INSERT, DELETE & UPDATE) is essential.

For the full 5 days of training it is strongly recommended that attendees have previous application development experience along with experience using scripting languages (VB or Jscript).

Topic Outline:**Day 1**

- Class Introductions
 - Course Objectives, Content & Timing
 - Setting Student Objectives
- Introduction to Metastorm BPM
 - State Transition Model
 - Introduction to round-trip of Metastorm products
 - Metastorm BPM Concepts
 - Web Client User Interface (UI) walk through
 - Demonstration of UI
 - Breakdown of workflow into STAR Matrix
 - LAB - familiarization with the UI and workflow
 - High level application architecture
- Introduction to the Metastorm BPM Designer
 - Structure of User Interface
 - Procedure structure
 - File types
 - Naming conventions
 - Publishing Procedures
 - Demonstration of Support Call procedure
 - LAB – Support Call Procedure Exercise 1
- Creating Maps
 - Map Structure and Properties
 - Types of Stages and Actions
 - Analysis of example workflow
 - Demonstration of workflow construction based on Support Call Procedure Exercise 2
 - LAB – Support Call Procedure Exercise 2
- Custom and System Variables
 - Metastorm BPM data types
 - System Variables
 - Custom Variables
 - Naming conventions and Hungarian notation
 - Demonstration of Custom Variable creation

- Demonstration of the Service Manager Utility SQL Query tool to view and maintain Custom and System variables
 - LAB - Support Call Procedure Exercise 3
- Forms
 - Form creation and formatting
 - Form elements properties
 - Saving forms as templates
 - Tab order of forms
 - Attaching forms to actions
 - Administration Forms
 - LAB - Support Call Procedure Exercise 4
 - Demonstration of re-open folder and chain actions
- Foundation Course Case Study
 - Expense Claim procedure specifications
 - Analysis of workflow layout with STAR Matrix
 - LAB – Expense Claim Exercise 1
 - LAB – Expense Claim Exercise 2
 - LAB – Expense Claim Exercise 3
 - LAB – Expense Claim Exercise 4

Day 2

- Review Day 1 Topics
 - LAB – Workflow Exercise
- Integration Wizard and Formula Editor
 - Introduction to Integration Wizard and Formula Editor
 - Demonstration of the “all note” function
 - Demonstration of calculating date-time
 - Demonstration of adding formula to conditional actions
 - Demonstration of the SQL builder
 - Demonstration of the condition builder
 - LAB - Support Call Procedure Exercise 5
- Dependencies
 - Demonstration of Dependency functionality
 - Demonstration of Visibility Depends on functionality
 - LAB - Support Call Procedure Exercise 6
- External Tables
 - External Table functionality
 - Demonstration of External Tables
 - LAB – Support Call Procedure Exercise 7
- Database Integration
 - Database Connection methods
 - Integration Wizard Connection methods

- Foundation Course Case Study
 - LAB – Expense Claim Exercise 5
 - LAB – Expense Claim Exercise 6
 - LAB – Expense Claim Exercise 7
 - LAB – Expense Claim Exercise 8

Day 3

- Review Day 2 Topics
- Grids
 - Introduction to Grids
 - Demonstration of “None of the above” Grid type
 - Demonstration of “Grid With Dependants” Grid type
 - Demonstration of “Editable” Grid type
 - Demonstration of “Folder “Grid type
 - LAB - Support Call Procedure Exercise 7
- Roles
 - Static Role type
 - Dynamic Role types
 - Demonstration of the Roles dialog and User and Roles Utility
 - Metastorm BPM roles
 - Demonstration of role creation and assignment using the Support Call Procedure
 - LAB – Support Call Procedure Exercise 8
- Foundation Course Case Study
 - Case Study Overview
 - LAB – Expense Claim Exercise 9
 - LAB – Expense Claim Exercise 10
 - LAB – Expense Claim Exercise 11
 - LAB – Expense Claim Exercise 12
 - LAB – Expense Claim Exercise 13

Day 4

- Review Day 3 Topics
- Advanced Action and Stage Functionality
 - Auto-forward folder Review and demonstration
 - Clone new folder Review and demonstration
 - LAB –Auto-forward folder and clone new folder exercise
 - Workflow Tips
- Form Segments, Map Segments and Libraries
 - Review and demonstration of using Form Segments
 - Review and demonstration of using Libraries
 - Review and demonstration of using Map Segments
 - LAB - Support Call Procedure Exercise 9
 - LAB - Support Call Procedure Exercise 10
 - LAB – Map Segment exercise

- Sub-procedures
 - Demonstration and review
 - LAB – Sub-Procedure Exercise
- Flags
 - Introduction to Flag Functionality
 - Demonstrate Flags
 - LAB - Implementing Flags exercise
 - LAB - Passing Data With Flags exercise
 - LAB - Passing Data With Flags from Procedure to Procedure exercise
 - LAB - Using eRaiseFlag.exe to Raise a Flag exercise

Day 5

- Review Day 4 Topics
- Rebuild To Do List
 - Demonstration of rebuilding the To Do list on Loop back actions.
 - Review of the eAlert table in the Service Manager SQL query facility
- Dataset
 - Demonstration of how to use Datasets
 - LAB – Dataset exercise
- Metastorm BPM Scripting
 - Introduction of Server-side scripting
 - Introduction of Client-side scripting
 - Demonstrate Scripting
 - LAB - Server-Side Script Custom Variable Assignment Exercise
 - LAB - Return Script Value Function Exercise
 - LAB - Hiding the Commit & Cancel buttons Exercise
 - LAB - Grid Scripting Exercise
- Button Options explained
 - Demonstrate Button Options
 - LAB – Next and Previous Chained Action buttons Exercise
- Document Management (DMS) Attachment clips
 - Demonstrate DMS Attachments
 - LAB – Using a SharePoint DMS Attachment clip Exercise
- Custom list for SharePoint Web Parts
 - Instructor review of custom list creation and deployment
 - LAB – Custom List Exercise
- Purpose of the System Administration Utility
 - Instructor review of features
- Metastorm BPM Project Implementation Methodology
 - Introduction to Project Implementation Methodology

- Wrap-up Case Study LAB
 - Case Study Overview
 - LAB – Internet Service Provider Exercise

- Class Review
 - Final questions
 - Sources of further information
 - How to contact the relevant Metastorm resource

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