

101 Metastorm BPM® 9.0 Foundation



Course Syllabus

Important Facts:

5 Days in Length

40% Lectures/Demonstrations

60% Hands-on Exercises

Target Audience:

This course has dual target audiences. Day 1 is targeted for Analysts, Program and Project Managers responsible for designing a Metastorm BPM application which automates a process. Days 1 – 5 are targeted for Process Developers responsible for developing a Metastorm BPM application which automates a process. Note that Day 1 of this course is equivalent to our 1-day 100 Metastorm BPM 9 Overview course.

Class Objectives:

Day 1

After completion of the first day of the instructor led training, the student will have a good level of hands-on development experience with the User Interface of the Metastorm BPM Designer and be able to use it to create process diagrams, forms and roles. In addition they will be able to articulate core Metastorm BPM concepts, enabling them to effectively communicate with Metastorm BPM developers.

Specific outcomes include:

- Ability to articulate Metastorm BPM concepts
- Ability to present and explain a Metastorm BPM design to end users
- Ability to create graphical representations of business processes, including forms, roles and process lanes

Days 1 - 5

After completion of the full five days of the instructor led training, the student will have a good level of hands-on development experience with the standard Metastorm BPM 9 architecture and tools while obtaining the necessary skills to develop a business process management solution utilizing Metastorm BPM 9.

Specific outcomes include:

- Ability to properly leverage the standard system architecture components of the Metastorm BPM application
- Ability to develop complete Metastorm BPM applications
- Ability to integrate Metastorm BPM with external databases, active directory/LDAP, and web services

Prerequisites:

For the full five days, it is recommended that attendees have experience with Microsoft Windows (Ribbon based user interface) products, fundamental relational database concepts, utilization of SQL statements, active directory/LDAP, web services & application development experience utilizing scripting languages such as C#, JScript & VBScript.

Topic Outline:**Day 1**

- Class Introductions
 - Course Objectives, Content & Timing
 - Setting Student Objectives
- Metastorm BPM Key Concepts and Architecture
 - Metastorm BPM 9 Terminology and Concepts
 - Standard Metastorm BPM 9 Architecture
 - Metastorm BPM Web Client
- Tour of the Metastorm BPM Designer
 - Metastorm BPM Layout
 - Metastorm BPM Designer Components
 - Configuring the Metastorm BPM Designer Options
- Developing a Simple Metastorm BPM Solution
 - Metastorm BPM Solutions
 - Metastorm BPM Projects
 - Metastorm BPM Processes
 - High Level View of Stage and Action Types
 - Metastorm BPM Process Model Styles
 - Metastorm BPM Solution File Structure
 - Metastorm BPM Validation
 - Metastorm BPM Deployment
- Introduction to Business Objects and Variables
 - Business Object Summary
 - Variable Types
 - Variable Data Types
- Developing a Simple Form
 - Metastorm BPM Forms
 - High Level View of Metastorm BPM Form Controls
 - Binding Business Objects to Forms
 - Binding Forms to Processes
 - Linking Form Controls with Business Object Variables
 - Binding Forms to Process Stages and Actions
- Utilizing Libraries
 - Introduction to Libraries
 - Deploying and Accessing a Library

- Applying Library Components to Projects
- Defining Logical Decisions and Conditional Actions
 - Introduction to the Expression Builder
 - Introduction to the Condition Builder
 - Defining Conditions
- Group Roles and Process Lanes
 - Introduction to Roles
 - Introduction to Process Lanes
 - How Roles and Process Lanes Relate
 - Administrating Group Roles

Day 2

- In Depth Review of a Complex Metastorm BPM Solution
 - In Depth Review of Stages and Actions
 - Sequential Processing versus Parallel Processing
- Examining Business Process Data Variables
 - Process Data Variable Type
 - Process Data Variable Table Schema
- In Depth Review of Form Components
 - Form Segments
 - Templates
 - In Depth Review of Forms and Form Controls
 - Field Dependencies

Day 3

- Flags and Flag Actions
 - Flag Component Details
 - Raising a Flag
 - Flag Actions
- Designer Tools: IntelliSense, Expression Builder, and Visual Scripting
 - Introduction to IntelliSense
 - Where to Find the Expression Builder
 - Event Handlers
 - Introduction to Visual Scripting
- Connections and Custom Business Objects
 - Connections
 - Connection Types
 - Custom Business Objects
 - Custom Business Object Types
 - Query Builder
 - External Database Integration
 - Grid Form Control Styles

- Column Type Settings
- Active Directory/LDAP Integration
 - LDAP Connections
 - LDAP Business Objects

Day 4

- Solution Tables, Administration Forms and SQL Commands
 - Solution Tables
 - Administration Form Groups
 - Administration Forms
 - INSERT Command
 - UPDATE Command
 - DELETE Command
- Reporting
 - Metastorm BPM Runtime Report Structure
 - Metastorm BPM Report Groups
 - Metastorm BPM Reports
 - Metastorm BPM Design Report Structure
- Group and Dynamic Roles with Process Lanes
 - Understanding the Difference Between Group and Dynamic Roles
 - Metastorm BPM Roles
 - Loopback Action Role Options
 - Applying Roles and Process Lanes to the Processes

Day 5

- Client Side Scripting in Metastorm BPM Forms
 - Client Side Methods
 - Client Side Events
 - Developing Client Side Script in JScript
 - Developing Client Side Script in VBScript
- Server Side Scripting
 - Reusing Custom Business Objects
 - Visual Script Code Activity
 - Scripting Editor
 - Assigning Values to Variables via C# and the Metastorm BPM API
 - Updating Business Object Variables via C#
- Web Service Connections and C# Integration
 - Web Service Connections
 - Integrating Web Services via C# Server Side Scripting
 - Promoting the Web Service to the Expression Builder
- Multi Lingual Process (MLP)
 - MLP Explained
 - Utilizing MLP within the Metastorm BPM Project
- Class Review
 - Final questions

- o Sources of further information
- o Who to contact the relevant Metastorm resource

© Copyright 2010, Metastorm Inc. All rights reserved. Business to the Power of 3, Enterprise Process Advantage, Metastorm BPM, Metastorm Discovery, Metastorm DNA, Metastorm Knowledge Exchange, Process Pod, ProVision, and the See.Think.Do image are either registered trademarks or trademarks of Metastorm Inc. Other product, service and company names mentioned herein are for identification purposes only and may be trademarks of their respective owners. 2.12.2010.