Introduction to Workflow

Goal
To provide a foundation of basic OnBase Workflow knowledge, concepts, tools and capabilities required for designing an elementary Workflow solution for a business process.

Course Description
This level one course introduces OnBase End Users and Partners to the processes and tools associated with designing, implementing, modifying and testing OnBase Workflow implementations. Training scenarios require students to employ multiple functions within their Workflow design. The course presents a hands-on approach to understanding the Workflow interface, interactions and possibilities.

Topics Covered
- Workflow Language
- Working Triggering Mechanisms
- Configuration
- Load Balancing
- Notifications
- Security
- Forms
- Client Interface
- Basic Design Techniques
- Debugging/Troubleshooting

Certifications
This course fulfills the requirement for:
- OnBase Certified Workflow Administrator (Customer)
- OnBase Certified Advanced Workflow Engineer (Customer)
- OnBase Certified Workflow Engineer (Partner)

Measurement
Students are expected to design and configure a Workflow solution based on business scenario specific requirements.
Prerequisites

► System Administration (End Users)
► Introduction to Installation (Partners)
► QuickLook: Workflow and OnBase Studio

Course Agenda

All topics are subject to change and may not appear in the order indicated here.

Day 1
- Workflow Overview
- Workflow Clients
- OnBase Studio
- Workflow Configuration
- Design Fundamentals
- Building a Basic Workflow Life Cycle

Day 2
- Timers
- Debugging and Troubleshooting
- Related Documents
- User Interface Improvements
- Changing Existing Life Cycles
- LAB: HR Solution Updates

Day 3
- LAB: Accounting Solution
- Notifications
- Solution Migration
- Security

Day 4
- Unity Forms
- Electronic and Virtual Forms
- LAB: Project Management Requests (Forms)
- Load Balancing/Ownership

Day 5
- Administration and Discovery
- Review/Exam