

AGILEPOINT COMPOSABLE APPLICATION DEVELOPMENT

Training Course Agenda

Course Overview

The AgilePoint Composable Application Development course is for everyone who wants to learn how to effectively use the AgilePoint Platform to automate and digitally transform their business processes. The primary objective of the course is to provide real-world application development experience as we create business solutions by implementing AgilePoint Applications. By the end of this course, students will have learned how to use the main tools in the AgilePoint Platform to build and deploy simple applications that will provide business solutions that have a positive impact on their organizations. Students will also have acquired the foundational knowledge necessary to continue their learning path as an AgilePoint Developer.

During this course we will build an Expense Report application from scratch using a project-based approach. We will build, publish, and test several versions of our application over the course of 4 days as we learn the most commonly used features, tools, and concepts within the AgilePoint Platform. We will accomplish this by building applications step-by-step with the instructor leading labs and explaining concepts interactively during class.

The course will also cover design principles and best practices which are useful to the design and development of adaptive Business Solutions. In addition, an introduction to how Artificial Intelligence (AI) capabilities can be incorporated into business processes leveraging the existing IT infrastructure of an organization to Operationalize AI will also be covered.

Course Information:

- Course Prerequisites: None
- Course Format: Instructor-led (lectures, labs, and discussions) - No Code Course
- Lecture: Live-online via Zoom or recorded via AgilePoint Academy LMS
- Lab Environment: AgilePoint provided NX 9 Training Account or Standalone Trial Tenant
- Materials Provided: Handouts and Course Notes provided (pdf format)
- Course Length: Live-online: 4 Days (6 hours per day)
- Course Length: AgilePoint Academy LMS: Approximately 15 hours recorded (on demand)
- **For the best Course experience** we recommend the students use 2 screens to take the course. For example:
 - Screen 1: Watch the Lecture and Lab Demos (instructor's screen)
 - Screen 2: Follow along with the instructor step-by-step in the lab environment

Audience

- Citizen Developers
- Developers
- System Analysts
- Project Managers
- Subject Matter Experts (SME)
- Business Solutions and Systems Architects
- Support Engineers

Course Topics Overview

The concepts listed below are taught in the context of the applications built during the course that support the Expense Report business process. During the course we will build process-based and form-based applications and learn how they can work together to provide a business solution.

Since the course is taught with a project oriented approach, we will cover topics as they come up as we build our Expense Report application. In this way, we will cover a topic and immediately put it into use. This will provide an optimum learning experience for both learning how to build applications as well as learning how to use the main tools of the platform. The main objective of this approach is to provide real world project-based

experience so that students are comfortable building AgilePoint applications by the time the course is completed.

The core content requires the full 4 days to cover completely, but we typically work in some extra material based on questions about the course content or specific interests of the students.

Course Topics by Category

Platform Overview

Provides a brief overview of the AgilePoint Platform and the main tools available on the AgilePoint Portal.

- Introduction to the AgilePoint Platform and its capabilities
- How AgilePoint enables Digital Transformation within your organization
- Working with the AgilePoint Platform

APP Builder

Primary tool used by AgilePoint Developers use to interact with and manage their applications in the design-time environment. App Builder also provides access to 2 main tools used to create applications: Process Builder and Form Builder

- APP Builder Overview
- Understanding the structure of AgilePoint Applications
- Working with AgilePoint Applications
- How to Validate and Publish Applications
- Importing, Exporting, and Cloning Applications

Process Builder

Process Builder is a development tool used to create business process models which are used to automate a business processes. Process Builder provides an extensive set of Activity Libraries containing over 1200 configurable automatic and manual activities which

allow you to integrate, leverage, coordinate over 100 popular 3rd party platforms and systems.

- Process Builder Overview
- How to analyze business requirements and create business solutions
- Best Practices and Design Considerations
- Working with Process Builder
- SwimLanes
- Manual Activity Configuration, Property Settings, and Lifecycle Events
- Users, Groups, and Roles
- Participant Configuration
- Manager, Group, and Role macros
- Using variables to identify task participants and groups
- Task Pools
- Working with Flow Lines
- Manual Activity Escalation Path configuration
- Email Templates Overview (Global and Process Model Email Templates)
- Manual Task Activity Email Notifications
- Other Task Notification options
- Automatic Activity Configuration and Property Settings
- Email Activity Template Notifications
- eForm Activity gear icon options
- eForm Activities (Start Task, StandardTask, Advanced Task, etc.)
- Start Task vs. The Standard Task
- AND Activity / OR Activity configuration options
- Automatic Activity Configuration, Lifecycle Events, and Automatic Task Settings
- Automated Activity Basic Error Handling
- Automated Activity Advanced Error Handling (Manual and Automatic)
- Error Handling Best Practices
- Condition Activity (Configuration, Rules, Order of Expressions, Complex Expressions)
- Condition Activity (When order matters and when it doesn't)
- Condition Activity (Re-ordering rules with drag and drop)
- Condition Activity (Best Practices and Examples)
- Subprocess Overview
- Subprocess Activity Configuration

- Subprocess Process Model Properties for Subprocesses Configuration (OnCompletion)
- Subprocess Error Handling and Best Practices
- Loop Structure (Initialize Loop and Get Next Item)
- Query Entity Records Activity
- Create Entity Record Activity
- Insert Entity Record Activity
- Update Entity Record Activity
- Upsert (Insert or Update) Activity
- Extender Library - Service Level Agreement
- Report View Design and Configuration
- Manual Activity property settings (AutoComplete, Submit Step, ReportView, Wait All Incoming, Session Mode, Wait Work Performed, etc.)
- Process Design Patterns
- Explicit vs. Implicit Design Principles
- Data-Driven Form-Based Application
- Using multiple applications to implement a business solution
- Introduction to Cross-Functional Applications
- Introduction to Dynamic Applications
- Introduction to using AgilePoint's AI Capabilities

Form Builder

Forms Builder is a development tool used to create dynamic eForms for manual eForm Activities, Forms used within Data-Driven Form-Based applications, and to create Read-Only Widgets eForms for use within Page Builder. The most common use of Form Builder is to create custom eForms for use with manual tasks assigned to individuals and groups within a business process to provide a customized user experience for each user designed specifically for each task.

- Overview of Form Builder and the 70+ available form controls
- Understand the benefits of creating customized task forms
- Working with Form Builder
- How to use Bulk Edit to configure controls

- Form Control Configuration (TextBox, TextArea, CheckBox, DropDown, Yes/No Radio button, Date, Image, User List, Currency, Number Box, Heading, Label, Horizontal Line, Spacer, Subform, Formula, Auto-Lookup, Pop-Up Select, Comments, etc.)
- Understanding how to use the Grid Layout System
- Control Layout and Alignment (Number of Columns, Spanning Columns, Label and Width adjustment, Section Configuration, Row Width)
- Subform Configuration and Design Patterns
- eForm Best Practices and eForm Design Strategy
- Form Rules Overview
- Form Rules (Form Level Rules, Control Level Rules, Section Level Rules)
- Customizing the Appearance and Behavior of Form Controls
- Introduction to Cascade Style Sheets - CSS (Global and Local)
- Introduction to JavaScript (eForm Helper Methods)
- Data Validation
- Report View Activity creation and Report View Form Design
- Form-Based Application Overview
- Create a Data-Driven Form-Based Application
- Use a Data Entity as the Primary Data Source
- Lookup Overview
- Drop-Down Control using a Lookup
- Auto-Lookup Control Configuration options
- Related Fields
- How to leverage cascading lookups
- Understand how to use forms within a Form-Based application

Data Entity Designer

Data Entity Designer is a developer tool used to create and manage Data Entities and Picklists.

- Overview of Data Entity Designer
- How to Create Data Entities
- How to create fields with a Data Entity
- Available Field Types
- How to create Parent to Child relationships (1:N relationships) between Data Entities
- Strategies for effectively using Data Entities within AgilePoint applications
- How to represent repeating rows of data using a Subform Control
- How to create and use Picklists within AgilePoint applications
- Best Practices for Data Entities and Picklists

Work Center

Work Center is a tool used by Citizen Developers to test their applications and may be used by business users to process tasks and work with process instances in the AgilePoint Environment. Many organizations also customize their work environment using Page Builder or integrate AgilePoint into one of their existing platforms to make things easy for their business users to include AgilePoint in their existing workflow.

- Overview of Work Center
- Working with Tasks
- Working with Processes

Manage Center

Manage Center is one of the main tools Administrators and Citizen Developers use to configure the AgilePoint Environment and manage the Runtime Process Instances.

- Overview of Manager Center Functionality
- Runtime Management
- How to search for and review process instance data
- Process Instance Management (Suspend, Resume, Inspect Property Settings, ProcessData, Error)
- ChangeFlow

- Process Instance Migration
- Working with Tasks
- Shared Global Variables
- Global Access Tokens
- eForm Settings (Languages, Validation Masks, File Types, Groups, Roles, and Predefined Lists)
- AccessControl (Users, Groups, Roles, Delegations)
- Permissions
- Introduction to AgilePoint's AI Capabilities