



Progression Advanced User Technical Training Syllabus

The purpose of this document is to provide a brief synopsis of the Progression Technical Training.

Note: With each course section, there are hands on exercises with a mixture of lecture and discussion opportunities.

The following are assumptions made with regard to the training audience.

- The reader has received at least one day of iDatix provided training,
- The reader has used the iDatix iSynergy software product for a period of no less than one month.

Foundational Terminology

The purpose of this section is to describe the foundational terms that are unique and/or specific to iDatix and how they are applied in the Progression software component.

Progression Basic Concepts: Automated Workflow

The iDatix Progression Suite improves upon the Business Process Automation model which is used in business to contain costs. Progression is a Business Process Management solution that provides an architecture for mapping business processes and automating the business process.

- Design Concepts
- Integration with Other Software Applications
- Business Process
 - Evaluation
 - Design
 - Execution
 - Monitoring
- Progression Work Pools

Progression Basic Concepts: Follow the Document

The Progression Design Studio is an intuitive and easy to use tool for laying out the business process with a unique follow the document/data approach. Defining business processes in this way significantly reduces the complexity of the design and the management of resources. Progression Studio allows the business owner to take an incremental approach to deployment for rapid success.

- Connection between iSynergy and Progression

Progression Studio: Dashboard

One of several goals in Progression 3.8 is to provide quick, easy access to functionality, and to support all preferences and choices for accessing functionality. You will note that in each area of Progression:

- Tool Accelerators
- Right-Click menus
- Full menu systems
- Tool Tips

Creating and Defining Documents and Binders

Document definitions create a link between the Progression Application and the iSynergy Application. This is done by creating links to the iSynergy application and its' indexes to determine when a table entry indexes match the Progression document you are representing.

Binder Definitions provide the ability to view related document definitions. Multiple documents within Progression can be related to each other by adding them to a binder definition.

- Creating and Defining Documents
- Document Definition Windows
- Creating and Defining Binders
- Naming Conventions
- Using Key Fields
- Mapping Documents from other Applications using a shared value
- Creating, Defining and Using Related Documents and Binders
- Creating and Defining Sub Binders

Task Overview

You can effortlessly define any business workflow process with the Process Designer Studio Workspace by choosing the appropriate accelerator tool button located across the top tool toolbar.

- Process Designer Workspace Tool Accelerators
- User Defined Tasks Pane
- Start Task
 - Binder Entry Points
 - Document Entry Points
 - Waiting for Documents on an Entry Point
- Exceptions
- Manual User Task
 - Steps

- Available Actions
- Suspension Settings
- Assignments
- Notifications
- Assignment Tasks
- Decision Tasks
- OR Split Task
- AND Split Task
- Merge Task
- Document Wait Task
- Data Sync Tasks
- Automatic Task
- Sub-Process Task
- Finish Task

Creating and Defining Processes

After the Document and Binder has been defined, you can begin to define your process workflow.

- Progression Designer Workspace
- Creating and Defining Processes
- Naming Conventions
- Saving a Process
- Implementing a Process

Managing the Process

The Workflow Manager Workspace presents real-time information regarding the actual process or workflow being viewed. When a process or workflow is implemented, this is the space in which processing information and status may be accessed and monitored.

- Manager Workspace
- Process Properties
- Management-at-a-Glance
- Process Statistics

Reporting

The Reporting Pane contains the predefined reports that ship with Progression and allows you open and save reports, as well as add new user defined reports.

- Process Report

- Production Report

Installation and Deployment

Progression's installation methodology allow various scenarios, to be deployed, including isolating specific machine where all the components are installed on one machine, as well as, a scaled and balanced deployment across many machines,

- System Requirements
- Server Deployment
- Database Deployment
- Studio Deployment
- Client Installation
- Licensing