



SpringCM Process Automation

PS-PA100

Course Description:

This course covers in detail how to use the SpringCM advanced workflow process designer to configure a variety of workflows – simple to complex. Taught in a workshop format, the course focuses on best practices, standard conventions, and the application of advanced workflow functionality to solve real world business cases.

Course Objectives:

Upon completion of the Process Automation course, attendees will be able to:

- Gain familiarity with the workflow basics which include action automation, declaring workflow variables, publishing and validating workflows, and troubleshooting workflow issues
- Create a contract management solution that includes merging documents using SpringCM generated XML data, setting document metadata, leveraging human workflow tasks for editing/approving documents, sending of documents from SpringCM for electronic signatures using out-of-the-box integration- to commonly used eSign tools, and initiating the workflow process by using an eForm to capture user defined data
- Leverage decision steps, choice steps, human steps as well as a variety of workflow initiation methods
- Utilize looping behavior/steps, finding documents by metadata, processing multiple documents at once, and much, much more
- Gain familiarity with the Contract Management Lifecycle

Audience:

- Administrator
- Business Analysts
- Developers
- SpringCM Implementation Partners
- Business Users, Sales Operations, and IT Managers

Prerequisites:



- Completion of SpringCM Essentials course

Duration:

2 Days

Course Topics:

Module 1: Business Process Guiding Principles and Practices

- Understand the purpose of a business process
- Understand why business process modeling is important
- Become familiar how to model business processes
 - Explore the standard Business Process Modeling Notation (BPMN)
 - Understand how SpringCM workflow has a custom modeling notation and has been derived from the BPMN standard
- Learn the benefits of business process modeling
 - Identify process improvements
 - Design future processes

Module 2: Design Patterns

- Understand the purpose of a design pattern
- Become familiar with the most commonly used workflow design patterns

Module 3: Development Environment

- Explore the SpringCM Workflow Designer Environment
 - Build a Workflow
 - Monitor Workflow Activities
 - Workflow Debugger

Module 4: SpringCM and XML

- Identify the different type of markup languages
- Understand the difference between HTML and XML
- Learn the basics of XML and SpringCM XML Configuration

Module 5: Deployment

- Understand the deployment process within SpringCM



- Identify the SpringCM components packaged and deployed
- Identify how a package is used in the SpringCM deployment process
- Describe the steps on how to create a package
- Understand the packaging limitations within SpringCM

Module 6: Fundamentals

- Understand the purpose of a variable
- Identify the different variable types
- Explore the different ways to start a workflow

Module 7: Document and Folder Activities

- Learn document and folder manipulation capabilities
- Identify document creation capabilities
- Explore finding documents and folders capabilities

Module 8: Workflow Assignment

- Utilizing actor variables
- Identify different actor roles
- Get familiar with the different assignment options
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Module 9: Flow Control

- Explore work flow control with logical conditions and rules
- Flow control using loops
- Identify common reasons for using flow control within a workflow

Module 10: Sending Emails

- Sending an Email without and with attachments
- Send for External Review
- Send for Signature

Module 11: eSignature Integration

- Explore electronic signature types supported by SpringCM
- Learn how to configure electronic signatures in SpringCM



Module 12: Best Practices

- Identify Workflow Organization, Naming Convention, Steps and BPMN Practices
- Discuss the importance of Workflow Robustness and Exception Handling
- Get familiar with Workflow Administration, Maintenance and Deployment practices
- Learn about SpringCM On Demand Resources