

# Symantec Workflow 7.1 Administration

## COURSE DESCRIPTION

The *Symantec Workflow 7.1 Administration* course is designed for I.T. administrators tasked with installing, designing, building, and maintaining workflow projects, and integrating Workflow with existing systems. This five-day, instructor-led, hands-on class covers how to install Workflow and configure database, Notification Server, and Workflow settings. Students also learn how to design basic projects in Workflow Designer. Students then build a comprehensive Vacation Request project and add functionality to it using components, data types, integrations, forms, rules, triggers, escalations, and time-outs. When the project is complete, students learn how to publish and package the project and make the project available to other users in Process Manager.

### Delivery Method

Instructor-led training (ILT)

### Duration

Five days

### Course Objectives

By the completion of this course, you will be able to:

- Identify business processes that Workflow can automate.
- Install Workflow 7.1 and configure database, Notification Server, and Workflow settings.
- Describe the project types and when to use them.
- Design a project using demonstration components, and then develop a project by replacing those components with actual components, forms, mappings, and integrations.
- Use the debugger to test a project and follow the data stream to troubleshoot issues.
- Customize a form with buttons, fields, titles, and a theme.
- Create generic e-mails and custom library components.
- Add escalations and time-outs to a project.
- Design an exception handling flow that guards against failures and looping, and adapt the exception handling flow for each model in the project.
- Implement and solve versioning issues in a project.
- Perform the steps needed to publish a project, and then package the project.

### Who Should Attend

This course is for I.T. administrators responsible for installing, designing, building, and maintaining workflow projects, and integrating Workflow with existing systems in their organization.

### Prerequisites

You must have basic working knowledge of Microsoft Windows and networking concepts, including LANs, network adapter cards, drivers, and operating systems. Experience using VMware is helpful but not required. Scripting and SQL knowledge are recommended, but not required.

### Hands-On

This course includes practical exercises that enable you to test your new skills and begin to transfer them into your working environment.

## COURSE OUTLINE

### Introducing Symantec Workflow 7.1

- Learning about Workflow
- Analyzing business processes
- Integrating with other products
- Learning about Workflow resources

### Installing and Configuring Workflow

- Becoming familiar with installation prerequisites
- Installing Symantec Installation Manager
- Installing Workflow Solution with Symantec Installation Manager
- Installing Workflow in the Symantec Management Console
- Configuring credentials

### Getting Started in Workflow

- Navigating in Workflow Designer
- Becoming familiar with Process Manager

### Creating a Simple Form Project

- Identifying the stages of a project
- Determining which project type to use
- Working with components
- Creating a project using component types
- Using demo components to start a project
- Debugging a project

### Saving and Deploying

- Packaging a project
- Introduction to publishing

### Building a Workflow Project

- Introducing models
- Adding form components
- Configuring processes in a dialog Workflow component
- Debugging a Workflow project

**Creating an Audit Trail**

- Configuring Process Manager security
- Setting up reporting in Workflow Designer
- Working with reporting components
- Looking at component data in Process Manager

**Expanding a Project's Functionality**

- Adding variables and property components
- Inserting data types and variable types in a project
- Initializing data
- Looping and branching
- Debugging the VacationRequest project to view values

**Creating a Secondary Model**

- Learning about secondary models
- Using a secondary model

**Integration**

- Getting started with integrations
- Connecting to data sources
- Working with custom data types
- Adding the integration to the VacationRequest project

**Mapping to Data Types**

- Introducing mapping to data types
- Performing mappings to data types
- Mapping the secondary model to the primary model

**Applying Advanced Customizations to Forms**

- Applying themes
- Formatting dialog boxes
- Designing the acknowledgement forms

**Verifying User Input**

- Becoming familiar with regular expressions
- Delving into the library

**Escalation**

- Defining escalation
- Implementing time outs

**Exception Handling**

- Preventing failures
- Applying exception handling throughout the project

**Versioning**

- Presenting versioning
- Upgrading from Workflow 6.x to Workflow 7.1

**Publishing**

- Publishing a project
- Performing post-publishing steps

**Working in Process Manager**

- Accessing Process Manager
- Creating a page for the project
- Reporting in Process Manager
- Best practices

