

Set Up Process HQ

Course Duration: 08 hours

Course Description:

This course will help you understand how to prepare and secure data that will be used in Process HQ. This includes requirements and best practices for acquiring, enriching, and securing data in Appian Designer. The participants will also learn how to add and configure a process in Process HQ.

Course Objectives:

In this course, you will –

- Recall the requirements and best practices for data acquisition and data enrichment tasks related to Process HQ.
- Identify the system groups used in the Process HQ environment. Learn considerations for securing data for different groups who use Process HQ so they can complete their work.
- Add and configure a process in Process HQ, and enable business users to access it.

Table of Content

Module 1: Overview of Process HQ

- Introduction to Process HQ
- Value and capabilities of Process HQ
- Navigation in Process HQ
- Roles and Responsibilities of Process HQ Users

Module 2: Prepare Your Data for Process HQ

- Define Datasets
- List record type properties that appear to Process HQ end users
- Defining terms case and event history as used by Process HQ
- Requirements for the case and event history record types
- How Process HQ handles common data quality issues

Module 3: Security and Process HQ

- System groups necessary for Process HQ and their purposes

- Record type security and settings
- Configure process security

Module 4: Setup a Process

- Add a process in Process HQ
- Configure case and event history data used in a process
- Add custom attributes to a process
- Enable business users to access a process