



CHECKLIST FOR PARTNERS TRAINING

Trainer: Derveni Vasileia



Day 1:
1,5 hr

CHECKLIST FOR PARTNERS TRAINING

Business Setup

- Corporate, Division, Company, Location
- Currencies, Languages
- Regional settings

Users & application rights

- How to create users
- Application rights & roles
- Personnel
- Managers

Organizational Chart

- Groups and people
- Create and connect groups
- How to check inside groups

Home

- Search
- Menu
- User settings & User profile
- Customise layout and tiles
- Create multiple tabs

Notifications Bar

- Explain info-boxes purpose and functionality
- Unit that can re-activate notifications

Notes to communicate

- Send note between 2 colleagues
- Where to receive notification

Tasks

- Create task
- Task status
- Manage tasks

Calendar

- Access Calendar
- Monitor
- Complete tasks



Day 2:
1.5 hr

CHECKLIST FOR PARTNERS TRAINING

Business Process Management

- How to create a process
- Scheduling
- Relations and links, comments
- Drag-n-drop files
- File Versioning
- Sub-processes
- Add tasks to a process
- Complete a process

Workbench/ Dashboard

- Filters
- How to monitor

Quick Adds

- Back screen linking
- Basic fields

Key BPMN 2.0 diagram elements and symbols

- Flow objects: events, activities, gateways
- Data: data objects, data inputs, data outputs, data stores
- Connecting objects: sequence flow, message flow, association, data association
- Swim lanes: pool or lane
- Artifacts: group, text annotation, annotation



Day 3:
2 hrs

CHECKLIST FOR PARTNERS TRAINING

Workflow Creation

- Workflow design with an example case
- Add elements
- Add connectors / Gateways

App Builder

10 steps of App builder: Process-enabled applications

- Basic info
- User field creation
- User form designing
- Workflow in app builder
- Overview
- Publish

Workflow Execution

- Execution of process/app with workflow
- Monitor a workflow in a process

Workflows repository

- Workflow designs and categories
- Workflow reports (RACI, User activities report)
- Analytics
- Business Process Document, Business Process Guidelines



Day 4:
2 hrs

CHECKLIST FOR PARTNERS TRAINING

App Builder

- Non-Process enabled applications
- Report Type applications
- Kanban Type applications
- Widgets
- Tabs
- How to maintain/edit apps
- Copy/import

Business Rules

- Field rules
- Conditions
- Gateways
- Rest services
- Shell scripts
- Scripts before save

Robotic Process Automation

- RPA components
- AI components
- ML components

Enterprise Architecture

- Enterprise canvas
- Create & connect various canvases
- Link canvases with workflow categories or directly to workflows
- Customise the elements
- Operating model



FOR MORE INFORMATION PLEASE CONTACT:

Customer Success Team

+30 2310 402522

support@comidor.com

www.comidor.com

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