

MSS101: Microsoft Connectors

A hands-on, introductory course focused on the Microsoft Excel and Microsoft Word Connectors for ProcessUnity.

Course Objectives:

- Provide *thorough, hands-on* training for ProcessUnity application administrators and report authors
- Ensure attendees build confidence and expertise using ProcessUnity
- Allow attendees to learn by doing, experimenting, discussing and collaborating with peers
- Prepare administrators for optional ProcessUnity certification

Format:

- Formal presentation and demonstration
- Attendees will complete labs and quizzes using a ProcessUnity training instance

Day 1 (Morning)

8:45am Welcome

- Breakfast
- Assign personal training environments

Introduction: How Microsoft Connectors work with ProcessUnity instances

- What is the Microsoft Excel Connector?
- What is the Microsoft Word Connector?
- Example Use Cases

Microsoft Excel Connector: Import/Export

- Overview
- Getting Started
- Installing
- Connecting Excel to ProcessUnity
- Excel Pull (Export)
- Excel Push (Import)
- Working Examples / Labs

Lunch

- Lab time

Day 1 (Afternoon)

Microsoft Word Connector: Generate MS Word documents from ProcessUnity using customer-supplied templates

- Overview
- Getting Started
- MS Word DOT files
- MS Word Content Controls
- MS Word Fields
- MS Word Building Blocks
- Adding MS Word Templates to ProcessUnity
- Generating MS Word documents
- Working Examples / Labs

Conclusion / Wrap Up

- Discussion / Q&A
- Feedback / Course Survey