



Administrator Class Description

Aptify Administrator Class Description

Duration 2 days

Class begins promptly at 9:00 AM, with a morning break, hour lunch break, and an afternoon break. Class is scheduled to end at 4:00 PM each day, but times may vary based on student questions and discussions.

Hours Estimates

All hours listed in parenthesis are estimates—actual times will differ based on many variables such as:

- Student Ability
- Questions
- Side Discussions
- Labs & Exams

Overview

This course provides an overview of the administrative features of Aptify. The course is designed for individuals who will develop for or administer an organization's Aptify installation. This course builds on the material from the Aptify End User class, which is a prerequisite.

Students will walk through the operation by partaking in real-time interactions and labs. The focus of the class is on learning the application by using the system.

Who Should Attend

Course is intended for:

- Developers
- Database Administrators
- System Programmers
- System Administrators

Course Prerequisites

Required

- Completion of the End User Course
- Database Knowledge

Preferred

- Familiarity with SQL

Day 1

Administrator Training Overview (15 Minutes)

- Course Outline
- Training Goals

User Accounts (1 Hour)

- User and Group Administration Overview
- User Security Types
- Aptify Licenses
- Importing a License Pack
- Creating, Enabling, and Disabling Users
- Preferences and Profiles
- Group Security Model
- Linking Users to Other Records
- Create a Test User
- Create a Security Group

Advanced View Management (1 Hour)

- Overview
- Managing Views
- Creating and Copying Views
- Reassigning Views
- The Views Service
- Advanced SQL

Creating Dashboards (1 Hour)

- Overview
- Dashboard Structure (Areas, Parts, Components)
- Creating a Dashboard
- Building Button Bars
- Adding Views/Web Browsers
- Dashboard Display Logic
- Managing Dashboards for Users
- Assigning Dashboards
- Editing an Existing Dashboard
- Changing a Dashboard from Application to Global
- Simplifying the End User Experience

Creating and Managing Base Views (1 Hour)

- Overview
- Utilizing Existing Base Views
- Creating New Base Views using the Base View Wizard
- Editing Existing Base Views
- Adding Virtual Fields to Entities

Bulk Messaging (45 Minutes)

- Overview
- Message Sources
- Creating Message Parts and Templates
- Generating Message Schedules
- Message Runs
- External Mail Service Integration

Day 2

Introduction to Entities (1 Hour)

- Overview
- Assigning Entities to Applications
- Entities Service
- Types of Fields
- Creating and Modifying Fields
- Entity Field Options
- Extending Entity Functionality

Sub-Type Entities (30 Minutes)

- Overview
- Creating Sub-Type Entities
- Creating Sub-Type Fields
- Adding Sub-Type Security
- Using the Virtual Field Wizard

Configuring Security (2 Hours)

- Overview
- User/Group Security Mode
- Security Best Practices
- Security Levels
- Application Security - Entity Security
- Field Level Security
- Attachment Security
- Wizard & Entity Bulk Operation Security
- Row Set Security

Form Template Administration (1 Hour)

- Overview
- Form Template Metadata Model
- Form Template Display Logic
- Form Template Visual Designer
- Personalizing Tab Layout
- Form Template Copy Wizard

Data Operations & Management (1 Hour)

- Overview
- Generic Import Wizard
- Entity Bulk Operations
- Process Pipeline
- Creating Process Flows
- Executing Process Flows
- Exporting Data
- Using the CM Tool
- Database Maintenance