

Course Description

Join us for deep-dive training into the structural building blocks and automation features of the Onspring platform. Onspring Essentials training is for admin users who will be configuring and managing processes using apps, reports, dashboards, email messaging, access control, surveys, and other features.

As a participant, you'll receive training materials and login credentials for a dedicated Onspring lab instance. We'll guide you through an end-to-end **solution configuration process**, focusing on a sample use case. You'll gain knowledge and practical skills that you can apply to any business process you may implement in Onspring.

Questions? Please email training@onspring.com.

Session Abstracts

Platform Overview & Navigation

The Onspring platform is designed to help you capture, organize and share information while automating repetitive processes. In this session, you'll learn how to navigate Onspring from an administrative and end-user perspective to quickly locate the data and functions you need.

Learning Objectives:

- Understand the primary navigation features: Dashboards, Reports, Content and Administration
- Explore Onspring's global and targeted search features
- See how to update your user profile, including email preferences

App Structure

Apps allow you to capture, analyze, transform, and report on data in Onspring. They are essentially web forms or templates for collecting information in a consistent, repeatable manner. In this session, you'll explore use cases for apps and learn about app structure, including layouts, tabs, sections, and fields.

Learning Objectives:

- Understand the purpose of apps in the context of a variety of business processes
- Understand the link field, which uniquely identifies each record in an app
- See how record retention rules allow you to purge unneeded content from apps on a schedule

Field Types

Onspring provides a variety of field types for capturing data in specific formats. In this session, you'll learn about the properties of individual field types and how you can use field values to automate functions such as email messaging, report filters, document generation, etc.

Learning Objectives:

- Understand options for capturing data in a consistent way to power your business processes
- Learn about system fields, which produce unique record identifiers and track save activity
- See configuration details for all field types so you know how to adapt them to your needs

Data Relationships (Reference Fields)

Creating relationships between records is one of the most powerful capabilities of Onspring. In this session, you'll learn how to enter data in the system one time and use it in many places, creating greater efficiency in your business processes and reducing opportunities for user error.

Learning Objectives:

- Understand use cases for reference fields in a variety of business processes
- Learn about the types of record relationships (e.g., parent-child, multi-to-multi, etc.)
- Explore configuration options for reference fields, including display types and selection filters

Data Import

Loading data into Onspring is an important aspect of any implementation project. In this session, you'll learn how to use the data import tool to bulk-create and bulk-update records. You'll also see how to relate records to existing content in Onspring through the import process.

Learning Objectives:

- Understand guidelines and best practices for a successful data import
- Learn how to "clean" your data file to prepare it for import into a target app
- Explore methods for resolving import errors by modifying your data file or your app configuration

Users & Access

Once you configure apps in Onspring to capture, manage, and report on data, you need to give users access to those apps. In this session, you'll learn how to grant and revoke access to content and administrative functions, according to the needs of your user population.

Learning Objectives:

- Understand the fundamentals of access in Onspring: users, roles, and groups
- See how to design roles to streamline the user experience and protect data integrity
- Learn methods for testing access for a variety of user types

Onspring Logic

Logic utilizes conditional statements to drive automated actions within Onspring. In this session, you will gain valuable experience with constructing logical statements, as well as familiarity with Onspring's operator offerings. You'll also explore several use cases for logical rules, including report filters, email sending rules, and triggers and outcomes.

Learning Objectives:

- Recognize and locate the various system functions where Onspring logic comes into play
- Determine appropriate operators for specific use cases and field types
- Learn how to define clear and accurate logical instructions for Onspring to follow

Reports

Reports enable you to aggregate and filter data in Onspring apps in order to isolate specific types of information, understand the status of processes and activities, or view information from multiple apps all in one place. In this session, you'll learn how to define report properties, starting with simple display fields and moving into more complex report types.

Learning Objectives:

- See how to create temporary reports, save them for repeated use and share them with others
- Understand display fields, sorting options, numeric aggregation and hierarchical reports
- Discover how to refine your report results by applying data filters (i.e., logical conditions)

Charts & Calendars

Displaying reports in a graphical format can make the information easy to understand and digest. Whether you're presenting status reports to management or work queues to general users, graphical reports can help you convey essential details in a concise format. In this session, you'll learn how to transform table-style reports into charts and calendars, choosing from a variety of display settings.

Learning Objectives:

- Understand the range of options available for graphical reporting in Onspring
- See how to define your chart type, group and series data, 3D display and other properties
- Explore click-through options in charts, enabling users to dive into underlying record data

Dashboards

Helping your team find information quickly and minimizing distractions is a major objective of any Onspring implementation. Dashboards will serve as your "command centers," allowing you to present users with relevant data at their fingertips and guide them toward the action items that require their attention. In this session, you'll learn how to design dashboards that are tailored for specific roles within your business process.

Learning Objectives:

- Understand the fundamentals of dashboard design and best practices for user engagement
- See how to display reports, charts, embedded forms and dashboard action items
- Learn how to manage access to dashboards and test their display in a variety of roles

Formulas

Onspring formulas allow you to produce new data automatically by applying logical rules. For example, you can calculate a Status or Risk Rating based on conditions within a record, or you can produce a Next Evaluation Date based on previous survey results and a variable evaluation frequency. In this session, you'll learn how to work in the formula builder, and you'll explore common use cases for formula fields.

Learning Objectives:

- See formulas in action as they auto-calculate values live within records
- Explore sample formulas to understand how to employ specific functions to achieve desired outcomes
- Understand best practices for crafting efficient, maintenance-free formulas

Triggers & Outcomes

Triggers and outcomes make it simple to build automation into your Onspring apps. They help you streamline processes, reduce clicks and manual data entry, ensure data integrity, and save time. In this session, you'll learn how to configure a variety of outcome types to set values in records, require new information from end users, dynamically adjust an app layout, auto-create new content and more.

Learning Objectives:

- Understand how to automate functions based on logical conditions (triggers)
- Explore the menu of outcome types and understand how (and when) to configure each one
- Learn how to design triggers and outcomes that are logical and maintainable

Email Messaging

Once you've configured an app for data collection, automation and reporting, you need to reach out to users and alert them when content needs their attention. Email functionality allows you to share information with process stakeholders and drive them into the system. In this session, you'll learn how to craft emails with dynamic record content and apply filters to limit when emails are sent.

Learning Objectives:

- Understand how to build email bodies in Onspring to send messages automatically
- See how to apply templates and a custom From Address to improve delivery and sender recognition
- Learn best practices for engaging users with email (including the use of scheduled reports)