



K2 LEARNING™

K2 blackpearl Core Training Course

sourcecode:



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Questions, Comments or Feedback about this training course?

Please E-mail learning@k2.com with your comments or feedback. We appreciate any feedback that helps us to improve the quality of our learning material.

1. Course Description

The *K2 blackpearl Core* training course is designed to give participants the fundamental knowledge required to work effectively with the K2 platform, and covers the core components, functionality and use of the K2 blackpearl platform.

This course is the foundation for all specialized competencies offered by K2 and should be completed before branching into a specialized competency.

During this course, participants will learn:

- About K2 and SourceCode's history and range of products
- About the core components of K2 blackpearl and how they are used to implement business applications
- How to approach the Design, Assembly, Deployment, Execution and Monitoring of K2 applications with K2 Studio
- What K2 SmartObjects are, how to create K2 SmartObjects using K2 tools and how to use SmartObjects in workflows and user interfaces
- How to use the K2 workspace to report on K2 workflows
- How to administer a K2 environment with the K2 workspace
- How to gather specifications for K2 projects and how to ensure success in K2 projects

This course also includes a selection of quick-reference guides.

2. Intended Audience

The *K2 Core* training course is intended for all roles that need to work with the K2 platform, including SharePoint Site owners and administrators, workflow designers and developers, system administrators, project managers, business analysts, solution architects, citizen developers, support staff, and infrastructure specialists.

After completing the K2 Core training content, participants may move on to more specialized content which covers their particular role.

It is not required to have any previous experience or knowledge of the K2 platform prior to participating in this course.

3. Outcomes

At the end of this course, participants will have a solid fundamental understanding of the K2 platform's core components and how they are applied in real-world situations. Participants will be able to create basic process-driven K2 applications with K2 Studio and understand how to design, assemble, deploy, execute and monitor basic K2 business applications.

4. Course Prerequisites

To get most out of this training course, it is highly recommended that the participants have the following skills and proficiency levels. (There is no requirement to be familiar with K2, or have experience working with K2 blackpearl or K2 blackpoint)

Technology/Skill	Proficiency	Notes and examples
Microsoft SharePoint 2010 - Design, Customization and Administration	Basic	Although not strictly necessary, familiarity with SharePoint 2010 will help participants to complete some of the exercises in this course. A basic understanding of SharePoint sites and how to create content in SharePoint will be sufficient.

5. Course Materials and resources

5.1 Learning Module Materials

This training course is divided into several modules (see [Course Content](#) for a listing of the course modules). Modules are named in the format nnn.AAA (where nnn represents to complexity level of the module, and AAA is a random 3-letter identifier code). Each module typically has the following resources:

- **Participant Guide/Handbook** (*nnn.AAA – Module Name.pdf*)
A .pdf file or printed hard copy containing the student notes for each Module. Participants may keep these guides and use them for reference and refreshing knowledge at a later stage. The participant guides are usually provided in soft-copy .pdf format.
- **Lab Guide** (*nnn.AAA – Module Name.LABS.pdf*)
A .pdf file or printed hard copy containing the step-by-step guides to complete the practical exercises. Participants may keep these guides and use them for reference and refreshing knowledge at a later stage. The lab guides are usually provided in soft-copy .pdf format. Wherever possible, we recommend that participants copy the provided .pdf files to a separate e-reader device, since it makes it easier to follow along with the exercises in the training material. Participants may also print out the materials in hard-copy format, if desired.
- **Prerequisites installer** (*K2 Learning-nnn.AAA.exe*)
Learning modules that contain demonstrations or practical exercises typically have certain prerequisites that must be installed before the exercises can begin. These prerequisites include SharePoint sites and artifacts, pre-defined processes, SmartObjects, forms, report, databases and more. Each module contains detailed instructions on using the prerequisites installer and executing the setup scripts. These prerequisite installers are usually executed in the Virtual Server Environment provided for each course attendee.
- **Presentation** (*nnn.AAA – Module Name.pptx*)
A Microsoft PowerPoint 2010 slide deck used by the course instructor for guiding topic discussions. The module slide decks are usually not shared with participants since the handbooks contain snapshots of each slide used in the presentation.

5.2 Other Materials

In addition to training materials, the course may include other resources such as Quick-Reference sheets and posters.

- **Quick-Reference Sheets** (*QRS.nnn.pdf*)
Quick-Reference sheets contain summarized information in an easy-to-reference format. These sheets are typically used by participants after completing the course as a refresher or quick reference.



The Learning Module materials and virtual server environments may not be shared with or exposed to organizations without valid licensing agreements with K2, or individuals who are not associated with a valid K2 customer, partner or distributor. Please check with your K2 representative if you have specific questions about the acceptable use of these materials and resources

5.3 Virtual Server Environment

The practical exercises for the course are completed on a Virtual Server environment provided by K2 (unless otherwise noted). These practical exercises are specifically created for the K2 blackpearl Solutions demonstration virtual servers provided by K2, and cannot be installed in any other environment unless noted otherwise.

The K2 Solutions virtual machine will be provided in either local (virtual machine) or hosted (cloud) modes. Depending on the course logistics and delivery mechanism, K2 may provision the hosted environments ahead of

time or participants will use on-demand provisioning to set up their virtual environments. Please refer to the K2 knowledge base article [KB001397](#) for more information about the different modes and the prerequisites for each approach.

Note that participants will not be able to share the same environment to complete the practical exercises. Each participant that will complete the practical exercises will need their own instance of the virtual server environment, but in some circumstances the course instructor may ask participants to team up when completing the practical exercises.

Depending on the course location and delivery mechanism, participants will be required to bring their own computers or K2 may provide computers for each attendee. The course confirmation e-mail will specify whether participants should provide their own computers.

6. Course Compatibility

The *K2 blackpearl Core* course is specifically created for K2 blackpearl 4.6 or later. Earlier versions of the K2 platform may not include the functionality and features discussed in this training course, and later versions or updates of K2 may add additional functionality not described in this course.

7. Course Schedule

The course start and end dates and class hours will be scheduled separately. The [Course Content](#) section describes a recommended schedule, but modules and timing may be adjusted at the instructor's discretion.

8. Course Content and Duration

This course will take approximately 14-16 hours to complete (excluding breaks and meal times). The table below lists the content for the course, the sequence in which the content should be presented and a suggested day and duration for each module. This training course is typically presented over 2 days, but logistical and delivery requirements may change the recommended schedule. When training is confirmed, participants will receive instructions on the logistical arrangements and scheduling for the course.

Course Content

Module	Overview	Outcomes	Duration**
Day 1*			7 hours
100.JNB Introduction to SourceCode and K2	This module introduces SourceCode Technology Holdings Inc. and the K2 product suite	At the end of this module, participants will understand the difference between SourceCode Technology Holdings and K2, have a high-level understanding of the products in the K2 product suite and understand how K2 meets business challenges.	0.5 hour
100.SEA K2 Fundamentals	This learning module introduces the K2 platform, and explains how the platform is used to implement applications, workflows, business processes and supports BPM and BPA. It also illustrates how K2 applies to the SDLC phases of Design, Assemble, Deploy, Execute, Monitor and Optimize This module also introduces the K2 workflow component with demonstrations and the opportunity to interact with a K2 process as an end-user.	At the end of this module, participants will understand the core components and functionality of the K2 platform, and have a high-level understanding of how business applications are designed, assembled, executed, monitored and optimized with standard K2 tools. Participants will also understand how K2 supports BPM and BPA and what the business benefits are to implementing applications with the K2 platform.	1.5 hours
100.IAH Building Workflows with K2 Studio – Fundamentals	This learning module introduces the K2 Studio design environment and describes the fundamental concepts used when designing, assembling, deploying executing and monitoring workflow-centric K2 applications with K2 Studio.	At the end of this module, participants should be able to design, build and deploy basic K2 solutions using K2 Studio. Participants should also be able to use the available K2 reporting tools to monitor workflows and understand how end users interact with a K2 process	4.5 hours
100.SYD K2 SmartObjects – Fundamentals	This learning module introduces K2 SmartObjects, describes how K2 SmartObjects can be used and explains how to create and use K2 SmartObjects. This introductory module will cover the most common and fundamental use cases for SmartObjects	At the end of this module, participants will have a good fundamental understanding of K2 SmartObjects and how these are created and used in real-world scenarios	1.5 hour

Day 2*			7 hours
200.DUB K2 Workspace - Administration	This learning module describes how the K2 Workspace component is used to administer a K2 environment	At the end of this module, you should have a good understanding of the administration features of the K2 blackpearl workspace, should be able to administer different K2 environments with K2 Workspace and a have a good understanding of the common administration tasks that are performed on a K2 environment.	3 hours
200.AUS Building Workflow Solutions with K2 Studio – Intermediate	This learning module describes how to use K2 Studio to create more workflow solutions with an intermediate level of complexity	At the end of this module, participants will understand how use K2 Studio to create workflows with an intermediate level of complexity, such as workflows with multiple approvals, complex outcomes and more advanced process designs. Participants will also know how to design and build K2 workflows according to best practices and for long-term sustainability.	2 hours
200.PER K2 SmartObjects – Intermediate	This learning module describes enhanced uses and creation of K2 SmartObjects such as composite SmartObjects, SmartObjects based on Standard K2 Service Brokers, joins and lookups.	At the end of this module, participants will have a good understanding of the more advanced uses and creation of K2 SmartObjects, and how to apply these to real-world requirements.	2 hours

*The course content may be regrouped into different days depending on scheduling and delivery requirements

**Module duration is estimated and may be shorter or longer depending on delivery and participant skill

9. Additional content, self-study and directed readings

The following content supports the core course content listed above. This content may be covered during instruction sessions if time allows, or may be assigned as self-study or directed readings.



This additional content will assist participants who wish to undertake the certification test for the *K2 blackpearl Core* competency. Participants are encouraged to review the additional content before attempting the test.

9.1 Self-study Training modules		
<i>Depending on logistics and scheduling, the following learning modules may need to be completed as self-study</i>		
Module	Overview	Outcomes
100.BRU K2 Workspace – Reporting	This learning module covers the standard reporting features available in the K2 blackpearl Workspace component. We will discuss the various standard reports that are available in K2 and how these are typically used.	At the end of this module, participants should have a good understanding of the standard reports available in the K2 workspace, how these reports are typically used, understand how to use the K2 View Flow component and have a high-level awareness of K2 archiving and custom reporting in K2 workspace.
200.BSB Ensuring Success in BPM Projects	This learning module discusses strategies, techniques and practices that help to achieve successful implementations of BPM projects and process-driven solutions on the K2 Platform	At the end of this module, participants will have a good understanding of the challenges faced with BPM implementations and how to mitigate or address these challenges with specific approaches and strategies to ensure successful BPM projects
200.IDO Gathering Specifications and Requirements for K2 Projects	This learning module discusses techniques, approaches and practices that can be used during the specification gathering phases of a K2-based project	At the end of this module, participants will know how to gather specifications for K2 projects, which questions to ask during the specification gathering phase and will have access to templates that can be re-used to consistently gather specifications and design a K2-based solution

9.2 K2 Learning Quick-Reference Sheets		
<i>These documents are intended as quick-reference resources and support the knowledge gained through the training modules for this course</i>		
Quick-Reference Sheet	Description	Link
QRS.001 Quick Reference - Standard K2 Reports	Describes the standard K2 Workflow Reports with use cases and data	http://help.k2.com/K2LS-QRS001.aspx
QRS.002 Quick Reference - K2 Securable Components	Describes which K2 components can be secured against unauthorized use.	http://help.k2.com/K2LS-QRS002.aspx
QRS.010 Quick Reference - K2 Studio Wizards	Overview of the Workflow and Event wizards available in K2 Studio	http://help.k2.com/K2LS-QRS010.aspx

QRS.011 Quick Reference - Workflow Execution Models and Design Patterns	Illustrates common workflow execution models (e.g. serial, parallel) and design patterns (e.g reworks and n-level approval)	http://help.k2.com/K2LS-QRS011.aspx
QRS.013 Quick Reference - K2 Designers Comparison	Functional comparison of the various K2 design tools	http://help.k2.com/K2LS-QRS013.aspx
QRS.014 Quick Reference - K2 Logging and troubleshooting	Describes the logging options available in K2 blackpearl and describes common troubleshooting procedures	http://help.k2.com/K2LS-QRS014.aspx
QRS.015 Quick Reference - Standard Service Brokers	Describes the standard service brokers ("connectors") available in K2 blackpearl	http://help.k2.com/K2LS-QRS015.aspx
QRS.023 Quick Reference - Naming conventions for K2 Artifacts	Suggested naming conventions when developing K2 solutions	http://help.k2.com/K2LS-QRS023.aspx

9.3 Whitepapers and knowledge base articles

These documents are intended as quick-reference resources and support the knowledge gained through the training modules for this course

Article	Description	Link
K2 Environment Library	Learn about managing and utilizing the Environment Library concept in K2 process development and deployment, including best practices, key terms, and step-by-step guides	http://help.k2.com/en/EnvironmentLibrary_Whitepaper.aspx
K2 blackpearl Best Practices	Whitepaper containing advice and instructions for choosing, designing, deploying and maintaining process-driven applications with K2 blackpearl	http://help.k2.com/en/kb000352.aspx
K2 Solutions Deployment Guide	This document explains how to achieve the successful deployment from a development environment to production	http://help.k2.com/en/KB001363.aspx
How to use the Deploy Package	Explains how to use deployment packages to migrate solutions between environments	http://help.k2.com/en/KB000188.aspx