



K2 LEARNING™

K2 smartforms Builder Training Course

sourcecode:



Course Overview: Contents

1. Course Description	3
2. Intended Audience	3
3. Outcomes.....	3
4. Course Prerequisites	3
5. Course Materials and resources	3
6. Course Compatibility	5
7. Course Schedule.....	5
8. Course Content and Duration	6
9. Additional content, self-study and directed readings	7

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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 smartforms Builder* training course is intended to enable participants to create K2 business applications using K2 smartforms as the User Interface.

During this course, participants will learn how to build user interfaces with K2 smartforms and then integrate these Forms with Workflows and Data (K2 SmartObjects).

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

2. Intended Audience

The *K2 smartforms Builder* training course is intended for [Citizen Developer](#) and web developer roles that need to create business applications on the K2 platform without writing code. Typical roles that fit this description include analyst developers, business analysts, highly-skilled power users and application developers.

Participants should have completed the K2 Core competency or training course before attempting this training course

3. Outcomes

At the end of this course, participants should be able to create simple to advanced K2 smartform-based business applications that interact with data and workflows.

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.
User Interface Design	Basic	Familiarity with User Interface design principles such as controls, events and macro-like statements. Experience with building InfoPath forms, Access forms, SharePoint forms or any basic programming experience will be useful.

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 the modular 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 smartforms Builder* course is specifically created for K2 blackpearl 4.6 with K2 smartforms 1.0.1 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 has 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 9-11 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.

Module	Overview	Outcomes	Duration**
Day 1*			8 hours
100.YYZ K2 smartforms - Fundamentals	This learning module introduces K2 smartforms and covers the fundamental components, design and use of K2 smartforms	After completing this module, participants should have a fundamental understanding of K2 smartforms, including how smartforms fit into the K2 architecture, the components that are used together to create a smartform, how to design smartforms and how to present smartforms to end users. Participants will be able to create basic K2 smartforms to display SmartObject data and use K2 smartforms in a K2 Workflow.	4 hours
200.YUL K2 smartforms - Intermediate	This learning module describes more features, functionality and use cases of K2 smartforms, and will give participants a solid overall understanding of K2 smartforms	After completing this module, participants should have a good overall understanding of the features, functionality and use of smartforms to implement simple to intermediate-complexity solutions. They should be able to create Views and Forms easily and should understand how to use Rules, Expression and Actions to implement more advanced user interfaces with K2 smartforms.	4 hours
Day 2*			4 hours
200.YHZ K2 smartforms Hands-On Module - Expense Claim Approval	This hands-on learning module will guide solution designers through creating a Expense Claim solution incorporating K2 SmartObjects, K2 smartforms, K2 workflows, SharePoint and SSRS reports	At the end of this module, participants should have practical experience building a real-world scenario that integrates K2 SmartObjects, smartforms, workflows and SharePoint into a cohesive solution.	4 hours
<i>Note: Depending on logistics and scheduling, the 200.YHZ module may need to be completed as self-study</i>			

*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 SmartForms builder* competency. Participants are encouraged to review the additional content before attempting the test.

9.1 Self-study Training modules

Note: Depending on logistics and scheduling, the **200.YHZ K2 smartforms Hands-On Module - Expense Claim Approval** module may need to be completed as self-study

9.2 K2 Learning Quick-Reference Sheets

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

Quick-Reference Sheet	Description	Link
QRS.022 Quick Reference - K2 smartforms Implementation Tips	Provides tips and tricks for implementing well-performing and easily maintainable SmartForms.	http://help.k2.com/K2LS-QRS022.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 smartforms and Accessibility Compliance Whitepaper	Whitepaper describing Accessibility and Compliance testing for SmartForms	http://help.k2.com/en/KB001416.aspx
K2 SmartForms Online Help	Online version of the SmartForms product documentation	http://help.k2.com/en/k2smartformshelp.aspx