

OpenText Liquid Office course content

1. Introduction to OpenText LiquidOffice

- **Course Overview:** Understanding LiquidOffice capabilities, features, and use cases.
- **System Requirements:** Overview of the technical requirements for LiquidOffice installation.
- **Core Concepts:**
 - Forms management
 - Workflow automation
 - Integration with external systems
 - Security and access control

Lab:

- Set up a LiquidOffice environment.
 - Familiarize with the LiquidOffice dashboard.
 - Create a basic form and workflow.
-

2. Designing and Building Forms

- **Form Designer:** Introduction to LiquidOffice Form Designer.
- **Form Elements:** Using text fields, dropdowns, radio buttons, checkboxes, and other input elements.
- **Dynamic Form Elements:** Setting up conditional logic, form validation, and rules.
- **Form Styling:** Using custom CSS to style forms.

Lab:

- Design a form using the Form Designer.
 - Add and configure form elements with dynamic rules and validation.
 - Preview and test the form in the LiquidOffice environment.
-

3. Workflow Automation in LiquidOffice

- **Workflow Basics:** Creating workflows and understanding stages, actions, and decision points.
- **Process Designer:** Designing workflow processes using LiquidOffice's drag-and-drop designer.
- **Automated Actions:** Configuring automated tasks, such as email notifications, database updates, and conditional routing.

- **User and Group Management:** Managing workflow participants, roles, and permissions.

Lab:

- Build a sample workflow with multiple stages and automated actions.
 - Configure conditional routing and task assignments.
 - Test the workflow to ensure it progresses correctly through each stage.
-

4. Integrating LiquidOffice with External Systems

- **Data Connections:** Configuring data connections for SQL databases, web services, and other data sources.
- **API Integration:** Setting up LiquidOffice REST APIs for external system communication.
- **Document Management:** Integrating with document repositories like OpenText Content Server.
- **Web Services:** Using SOAP/REST web services to extend LiquidOffice workflows.

Lab:

- Set up a data connection to an external database.
 - Create a form that pulls data from an external source.
 - Test and validate data transfer between LiquidOffice and an external system.
-

5. Advanced Workflow and Process Management

- **Complex Workflow Scenarios:** Managing advanced workflow scenarios with multi-stage approvals, escalations, and reminders.
- **Workflow Optimization:** Configuring workflows for efficiency and error handling.
- **Performance Monitoring:** Using reporting and analytics to monitor workflow performance and identify bottlenecks.

Lab:

- Build a complex workflow with multiple decision points and automated escalations.
 - Implement a report to track the workflow's performance.
 - Test for scenarios requiring escalation and automatic reminders.
-

6. LiquidOffice Security and Compliance

- **Access Control:** Implementing role-based access and permissions for forms and workflows.
- **Data Privacy:** Ensuring sensitive data is securely stored and accessed.

- **Audit and Compliance:** Setting up audit trails and maintaining compliance with regulatory standards.

Lab:

- Set up a role-based access