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# Pastell Orchestrator Training

2 days (14 hours)

## Overview

Pastell Orchestrator enables the standardization of data exchanges between applications (EDM, signature management, directory, ERP) via traceable workflows. You will learn how to model workflows, automate processes, and ensure reliable integrations for e-government use cases.

This training aims to make you self-sufficient in the design and operation of Pastell workflows: form creation, action sequencing, status management, notifications, and error handling. The focus is on the robustness, traceability, and maintainability of processes.

The approach is 100% hands-on: guided workshops, demos, followed by a practical exercise on a complete workflow (submission, validation, signature, archiving). Deliverables include a workflow template, an operational checklist, and test scripts.

Like all our training courses, this one will introduce you to **the latest stable version** of the technology and its new features.

## Objectives

- Master the Pastell interface to search, filter, and track the complete history of a file from start to finish.
- Manage daily workflows by ensuring the creation, validation, and processing of files your organization.
- Diagnose and resolve common issues (data entry errors, missing documents, rejections from target platforms) directly from the graphical interface.
- Manage permissions and alerts by configuring user accounts, roles by department, and email notification rules.
- Provide first-level support and be able to classify an incident (distinguish between human error and a technical failure) to effectively escalate it to the IT department.

## Target Audience

- Application administrators and operators
- Integration/interoperability developers
- Technical project managers
- Business IT representatives (digital transformation)

## Prerequisites

- Be comfortable using a web browser and managing files (PDF, XML, etc.).
- Familiarity with your organization's workflows (e.g., the process for an invoice, a civil registry document, etc.).

## Technical prerequisites

- Computer connected to the Internet (standard office configuration, no minimum system requirements).
- Modern, up-to-date web browser (Google Chrome, Mozilla Firefox, Microsoft Edge, or Safari).
- Smooth network access to the Pastell training platform (be aware of potential blockages if the test platform is behind a VPN or corporate firewall).

## Pastell Training Program - Functional Administrators

[Day 1 - Morning]

### Introduction to Pastell and basic navigation

- Understanding Pastell's role: What is a flow, a connector, and a folder?
- Navigating the interface: Introduction to the dashboard, menus, and workspaces
- Searching and filtering: Finding a folder, using search filters, and exporting results
- Anatomy of a folder: How to read metadata, check attachments, and view history
- Hands-on workshop: Logging in to the platform, guided search for a folder, and comprehensive tracking of its history.

[Day 1 - Afternoon]

### Daily workflow management and handling simple roadblocks

- Creating and advancing a case: Entering information, uploading documents, and moving to the next step
- Identifying common errors: Understanding why a case is in error (expired certificate, missing field, platform rejection) without a code

- Resolving the issue: Re-initiating a workflow, correcting erroneous data, or properly rejecting a case
- Hands-on workshop: Simulating user errors (missing attachment, incorrect data entry) and resolution via the interface.

[Day 2 - Morning]

## Functional administration: Permissions, Users, and Notifications

- Managing users and roles: Creating an account, assigning a user to a department, and defining their permissions
- Managing alerts and notifications: Configuring email recipients upon receipt or a file is blocked
- Associating connectors with workflows: Understanding how to visually link a workflow (Signature Book, SAE) to a department
- Hands-on workshop: Creating a new user, assigning their permissions, and testing the receipt of a notification.

[Day 2 - Afternoon]

## Daily monitoring and autonomy

- Monitoring activity: Using simple statistics (volumes of processed cases, success rates)
- Creating an operational checklist: Daily routines for verifying that platforms are functioning properly
- Knowing how to submit a support request: Distinguishing between a functional error and a technical failure to report incidents
- Hands-on workshop: Full-scale scenario "A day in the life of a Pastell advisor" (managing incoming cases, resolving issues, and wrap-up).

## Target Audience

This training is intended for both individuals and companies, large or small, wishing to train their teams in new advanced IT technology or to acquire specific business knowledge or modern methods.

## Placement upon enrollment

The pre-training assessment complies with Qualiopi quality standards. Upon final registration, the learner receives a self-assessment questionnaire that allows us to evaluate their estimated proficiency with various types of technology, as well as their expectations and personal goals for the upcoming training, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could pose challenges for monitoring and ensuring the smooth running of the training session.

## Teaching Methods

Practical Training: 60% Practical, 40% Theory. Training materials distributed in digital format to all participants.

## Organization

The course alternates between theoretical input from the instructor, supported by examples and reflection sessions, and group work.

## Assessment

At the end of the session, a multiple-choice questionnaire is used to verify that the skills have been properly acquired.

## Certification

A certificate will be issued to each trainee who has completed the entire training program.