

Trainers

Cathy Champlin

Director, Support Services
800.997-9921 x1295

Patrick Goodwin

Implementation Consultant
Manager
800.997.9921 x1466

Agenda Summary

Monday | All Day Training

DocLink Web Client

Scan Requirements

System Settings

Auditing

Stamps & Notes

DocLink Security

Document Types & Properties

Security

Tuesday | All Day Training

Smart Form Toolkit

Workflow

Event Manager

Wednesday | All Day Training

Automation

ERM Capture

Output Manager

Thursday | Partial Day Training

Auto-Index and Retro-Index

Import Manager

Barcode Manager

DocLink Mobile/Web Client

Troubleshooting & Maintenance

Detailed Agenda*

Monday | 8:00am – 4:00pm

Welcome and Introductions – Cathy Champlin (CC) and Patrick Goodwin (PG)

Web Client (CC)

Scan Requirements (CC)

- DocLink Scan Requirements

System Settings (CC)

- Documents
- Folders
- Licensing and Registration
 - License Types
 - How Licenses are Checked Out
- Global Settings
- LDAP
- Login Control
- SSRS
- Email Servers
- Reports – Report Manager
- Print to DocLink
- Web-link
- Download Manager
- Indexing Paths
- Version Control

- Full Text Search

Auditing (CC)

- What is it?
- How to Configure Auditing
- Searching Audit Record

Stamps & Notes (CC)

Lunch Break (on your own)

Document Types and Properties (PG)

- What are they?
 - Configure Document Types
- General Tab
 - Name and Description
 - Code field is used for Workflow and does not apply
- Properties Tab
 - Creating Master Properties
 - Property Name, Prompt, and Property Type
 - Optional, Required, and Expected Properties
 - Creating property groups or line-item detail
 - Specify Key Property
 - Creating property validations
 - Lookups with a drop-down list or popup list

DocLink Security (PG)

- Roles
 - Access to document types
 - Access to stamps
 - Access to workflows
 - Role permissions
 - User Level Security
 - Secure property filters

Tuesday | 8:00am – 4:00pm

Smart Form Toolkit (PG)

- Document Creation
- Processing Smart Form
- Page Creation
- Smart Form Import/Export
- Attachments

Lunch Break (on your own)

Workflow (CC)

- Workflow Configuration Basics - Elements of Workflow
 - Workflow Options
 - Using the Workflow Designer
- Workflow Types One Workflow Status Per User vs. Shared Status
 - Supporting Documents
 - Workflow Modifications and Additions

Event Manager (CC)

- Types of Alerts
- Configuring Event Notifications
- Template Manager
- Monitoring Events

Wednesday | 8:00am - 4:00pm

Automation (PG)

- New Documents
- Routing Based on Property Values
- Custom Logic - *how this is administered*

Lunch Break (on your own)

ERM Capture (CC)

- What is ERM?
- How ERM Works
- ERM Service Configuration
- ERM Printer Configuration
- ERM Document Type Configuration
 - ERM Options
 - Decollation
 - ERM Properties
 - Rendering
 - ERM Templates
- Test Configuration
 - Restart ERM Service
 - Process Spool File

Output Manager (CC)

- What is Output Manager (OM)?
- How OM Works
- Service Configuration
 - Delivery Method Defaults
 - Purge Sent Items
- Configure Recipients
 - Standard vs. Dynamic
 - Delivery Methods
 - Routing List Assignments
- Configure Routing Lists
 - General
 - Supplemental Documents
- Troubleshooting Output Manager
 - Instances/Processes Options
 - OM Logs
 - Output Processing
 - Resending Documents

Thursday | 8:00am – 12:00pm

Auto-Index and Retro-Index (PG)

- What is Auto- Index and Retro-Index?
- How are They Configured?
 - Configuration of Data Sources
 - Configuring Auto-Index profiles and assigning them to a document type
 - General Auto-Index Profile Configuration
 - Configure Properties to Search On
 - Configure the Properties to be Returned
 - Return Properties – Append vs. Update
 - Profile Properties
 - Configuring Retro-Index for a document type – both scheduled and triggered
 - Configuring the Retro-Index service
 - Managing the Retro Index Queue and logs

Import Manager (PG)

- Image Queue
- XML Only into DocLink Documents with SSRS
- XML and Image Import
- Email Import

OCR (PG)

- Overview

Barcode Manager (PG)

- Configure Barcode
 - Barcode Sources and Document Types
 - General Tab
 - Zones
 - Multipage
 - Rejected Barcode Documents

DocLink Mobile (CC)

- DocLink Mobile
 - Quick Search
 - Capture
 - Workflow Approvals

Troubleshooting (CC)

- DocLink Error Log Locations
- Service Monitor
- Session Monitor

Maintenance (CC)

- Database
- Image Repository
- Web Manifest Utility

** Breaks are scheduled at approximately 10:00-10:15 am and 2:30-2:45 pm daily. Topics and timing are subject to change.*