

Trainer

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Beyond Limits Resource

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Topics at a Glance

Introductions

DL Cloud Environment Setup

Smart Client

Web Client

Mobile Client

Scanning Documents

Document Types & Properties

DocLink Security

Workflow

Stamps & Notes

Event Manager

Automation

ERM Capture

Common Admin Tasks

Troubleshooting

Detailed Agenda*

* Break is scheduled approximately at 10:30am – 11:00am. Topics and timing are subject to change.

Monday | 8:00am – 1:00pm Pacific

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Welcome and Introductions

DocLink Cloud Training Environment

- o Cloud vs. on premise expectations
- o You as tenant
 - o 30-day availability
- o Install Smart Client
- o Install Cloud Connector Service
- o Web and Mobile URLs

Smart Client Functions

- o Quick Inquiry
- o Advanced Inquiry
- o Full Text Search
- o Index Batch
- o Print to DocLink
- o Download Manager
- o Version Control
- o Workflow
- o GL Smart Forms/Custom Smart Forms
- o Administration

Web Client Functions

- o How is it different than Smart Client?
- o Quick Search
- o Advanced Search
- o Full Text Search • Version Control
- o Workflow
- o GL Smart Forms/Custom Smart Forms
- o Manual Index

Mobile Client Functions

- o Quick Search
- o Capture
- o Workflow Approvals

Scanning Documents

- o Scan Requirements

Document Types and Properties

- o What are they?
 - o Document Types
 - o Properties
- o Document Types
 - o Name and Description
 - o Code field
- o Properties
 - o Creating Master Properties
 - o Property Name, Prompt, and Property Type
 - o Optional, Required, and Expected Properties
 - o Creating property groups or line item detail
 - o Specify Key Property
 - o Creating property validations
 - o Lookups with a drop-down list or popup list

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DocLink Security

- Roles
 - o Access to document types
 - o Access to stamps
 - o Access to workflows
 - o Role permissions
- Indexing Paths
- User Level Security
 - o Secure property filters
 - o Example – confidential documents

Workflow

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

Stamps & Notes

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Event Manager

- Types of Alerts
- Enabling Event Notifications
- Monitoring Events

Automation

- Routing Based on Document Type
- Routing Based on Property Values

ERM Capture

- What is ERM?
- ERM Document Type Configuration
- Monitoring ERM capture ◦ Restart ERM Service ◦ Reprocess Files

Common Admin Tasks

- Installation
 - Client Application
 - ERM Printers
 - Indexing Paths
 - Integration

- User Accounts
 - Creating Users
 - Disabling Users

Troubleshooting

- DocLink Error Log Locations
- Service Monitor
- Session Monitor
- Licensing and Registration
 - License Types
 - How Licenses are Checked Out
- Self-help resources

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