Trainers	Agenda Summary
Joe Hussein Implementation Consulting Manager 800.997-9921 x1240 **Mike Knowles** Senior Implementation Consultant 800.997.9921 x1327	**Monday | All Day Training** Demo System Setup **Lab #1: Basic AP** Create Document Types, Batch Type, DFD Create Batches Perform Data Verify **Lab #2: Advanced AP + SQL Lookups** Customize Document Form Definition Various Formula Types Mappings Configuring Database Lookup Basic Customer Configuration Setup **Tuesday | All Day Training** **Lab #3: Classification** Create Classification Model Configure Document Separation Classification vs: Document Separation **Lab #4: Forms** Create DFD's for Each Document Type Signature Detection Checkbox Recognition Create Classification Model

Detailed Agenda*

Four 2-hour sessions
Coffee breaks every ~40 min to get caught up if needed
You'll get a demo login
Four labs total
1. Basic AP
2. Advanced AP + SQL Lookups
3. Classification
4. Forms

Monday | 8:00am – 4:00pm

Welcome and Introductions – Joe Hussein (JH) and Mike Knowles (MK)

Download the documents to be used throughout the class

Get set up in the demo system

Lab #1: Seeing is Believing

- Create a DFD from Scratch

- Configure a Document Type

- Create a Batch Type

- Process some Invoices

- See the power of Smart Capture firsthand in real time

Lunch Break (on your own)

Lab #2: Building a Solid Foundation

- Customize your Document Form Definition to meet customer requirements

- Learn to apply various types of formulas

- Gain exposure to Mappings

- Configure a database lookup

- Learn the basics of how to go about setting up a customer configuration

Dinner (on your own)

Tuesday | 8:00am – 4:00pm

Lab #3: Building a Solid Foundation

- Create a Classification Model
- Discuss the difference between Document Separation and Document Classification
- Configure Document Separation
- Learn when to Apply Classification vs Document Separation

Lunch Break (on your own)

Lab #4: Mastering the Principles

- Create DFD's for Each Document Type
- Learn how to use Signature Detection and Checkbox recognition
- Create a Classification Model
- Product Installation
    - o Cloud and On-premise
    - o Review Best Practices for Installation
- Support Basics
    - o Log File Location
    - o Artifact Collection
    - o Support Resources

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