Topics at a Glance

Trainers

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Introductions

DL Cloud Environment Setup

DocLink Web Client

Fundamentals – Scan Requirements & System Settings

Auditing

Full Text Search

Stamps & Notes

Document Types & Properties

DocLink Security

Smart Form Toolkit

Workflow

Event Manager

Automation

ERM Capture

Output Manager

Auto-Index and Retro-Index

OCR

Import Manager

DocLink Mobile

Barcode Manager

Troubleshooting & Maintenance

Detailed Agenda*

* Breaks are scheduled approximately at 10:00am – 10:15am. Topics and timing are subject to change.

Monday | 8:00am – Noon Pacific

Welcome and Introductions – Cathy Champlin (CC) and John Claiborne (JC)

DocLink Cloud Training Environment (CC)

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

DocLink Web (CC)

- How is it different than Smart Client?
- Licenses
- Quick Search
- Workflow Approvals
- GL Smart Forms/Custom Smart Forms

Scan Requirements (CC)

- Scan Requirements

System Settings (CC)

- Documents
- Folders
- Licensing and Registration
  - o License Types
  - o How Licenses are Checked Out
- Global Settings
- LDAP
- Login Control
- SMTP
- Reports – Report Manager
- Print to DocLink
- Web-link
- Download Manager
- Indexing Paths
- Version Control
- Full Text Search

Auditing (CC)

- How to Configure Auditing
- Searching Audit Record
- Reports

Stamps & Notes (CC)

Tuesday | 8:00am – 2:00pm Pacific
* Lunch is scheduled at 12:00pm – 12:30pm

Document Types and Properties (JC)

- 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 (JC)

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

Smart Form Toolkit (JC)

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

Wednesday | 8:00am – Noon Pacific

Workflow (CC)

- Workflow Configuration Basics - Elements of Workflow
    - o Workflow Options
    - o Using the Workflow Designer

- Workflow Types
    - o One Workflow Status Per User vs. Shared Status
    - o Supporting Documents
    - o Workflow Modifications and Additions

Event Manager (CC)

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

Automation (JC)

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

Thursday| 8:00am – Noon Pacific

ERM Capture (CC)

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

Output Manager (CC)

- What is Output Manager (OM)?
- Service Configuration
    - o Delivery Method Defaults
    - o Purge Sent Items

- Configure Recipients
    - o Standard vs. Dynamic
    - o Delivery Methods
- Configure Routing Lists
    - o General
        - Configuring document type
        - Configuring conditions
        - Distribution
            - Recipients/method
            - Default delivery methods
            - Output options
            - Coversheet
            - Failure notifications
    - o Supplemental Documents

Friday | 8:00am – Noon Pacific

Auto-Index and Retro-Index (JC)

- What is Auto- Index and Retro-Index?
- How are They Configured?
    - o Configuration of Data Sources
    - o 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
    - o Configuring Retro-Index for a document type – both scheduled and triggered
    - o Configuring the Retro-Index service
    - o Managing the Retro Index Queue and logs

Import Manager (JC)

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

OCR (JC)

- Overview

DocLink Mobile (CC)

- Quick Search
- Capture
- Workflow Approvals

Barcode Manager (JC)

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

Maintenance (CC)

- Database
- Image Repository

Troubleshooting (CC)

- DocLink Error Log Locations
- Service Monitor
- Session Monitor

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