

Trainers

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Topics at a Glance

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 Patrick Goodwin (PG)

DocLink Cloud Training Environment (CC)

- Cloud vs. on premise expectations
- You as tenant
 - 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
 - License Types
 - 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 (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
 - Example – confidential documents

Smart Form Toolkit (PG)

- 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
 - 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

Automation (PG)

- 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
 - ERM Options
 - Decollation
 - ERM Properties
 - Rendering
 - ERM Templates
- Test Configuration
 - Restart ERM Service
 - Process Spool File

Output Manager (CC)

- What is Output Manager (OM)?
- Service Configuration
 - Delivery Method Defaults

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

Friday | 8:00am – Noon Pacific

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

DocLink Mobile (CC)

- Quick Search
- Capture

- Workflow Approvals

Barcode Manager (PG)

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

Maintenance (CC)

- Database
- Image Repository

Troubleshooting (CC)

- DocLink Error Log Locations
- Service Monitor
- Session Monitor

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