

Trainer

Patrick Goodwin
*Implementation Consultant
Manager*

800.997.9921 x1466
patrickgoodwin@altec-inc.com

Moderator

Cathy Champlin
Support Director

800.997.9921 x1295
cathyhamplin@altec-inc.com

Agenda*

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

8:00am – 2:00pm Pacific

Welcome and Introductions

DocLink Cloud Training Environment

- Cloud vs. on premise expectations
- You as a tenant
 - 30-day availability
- Install Smart Client

Overview

- What is the SFTK?
- Hosting Smart Forms
- Accessing SFTK

Document Creation

- Document Creation Configuration
- Examples
- Document Creation Exercise

Attachments

- Attached Inquiry
- Unattached Inquiry
- Document Attachment Exercise

Page Creation

- Page Creation Configuration
- Page Creation Exercise

Processing Smart Form

- Document Processing Configuration
- Document Processing Exercise
- Search using Predefined Query
- Index using a Processing Smart Form

Custom XSLT Template

- Download and Install Tool (30-day free trial)
- Configure XSLT Template.