DocLink

In-Person Advanced Admin Training

Trainers	Agenda Summary
Cathy Champlin *Director, Support Services* 800.997-9921 x1295 **Patrick Goodwin** *Implementation Consultant Manager* 800.997.9921 x1466	**Monday | All Day Training** DocLink Web Client Scan Requirements System Settings Auditing Stamps & Notes DocLink Security Document Types & Properties Security **Tuesday | All Day Training** Smart Form Toolkit Workflow Event Manager **Wednesday | All Day Training** Automation ERM Capture Output Manager **Thursday | Partial Day Training** Auto-Index and Retro-Index Import Manager Barcode Manager DocLink Mobile/Web Client Troubleshooting & Maintenance

Detailed Agenda*

Monday | 8:00am – 4:00pm

Welcome and Introductions – Cathy Champlin (CC) and Patrick Goodwin (PG)

Web Client (CC)

Scan Requirements (CC)
DocLink Scan Requirements

- Scan Requirements

System Settings (CC)

- Documents
- Folders
- Licensing and Registration
    - License Types
    - How Licenses are Checked Out
- Global Settings
- LDAP
- Login Control
- SSRS
- Email Servers
- Reports – Report Manager
- Print to DocLink
- Web-link
- Download Manager
- Indexing Paths
- Version Control

- Full Text Search

Auditing (CC)

- What is it?
- How to Configure Auditing
- Searching Audit Record

Stamps & Notes (CC)

Lunch Break (on your own)

Document Types and Properties (PG)

- What are they?
  - o Configure Document Types
- General Tab
  - o Name and Description
  - o Code field is used for Workflow and does not apply
- Properties Tab
  - 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

DocLink Security (PG)

- Roles
  - o Access to document types
  - o Access to stamps
  - o Access to workflows
  - o Role permissions
  - o User Level Security
  - o Secure property filters

Tuesday | 8:00am – 4:00pm

Smart Form Toolkit (PG)

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

Lunch Break (on your own)

Workflow (CC)

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

- Workflow Types 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

Wednesday| 8:00am – 4:00pm

Automation (PG)

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

Lunch Break (on your own)

ERM Capture (CC)

- What is ERM?
- How ERM Works
- 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)?
- How OM Works
- Service Configuration
  - o Delivery Method Defaults
  - o Purge Sent Items
- Configure Recipients
  - o Standard vs. Dynamic
  - o Delivery Methods
  - o Routing List Assignments
- Configure Routing Lists
  - o General
  - o Supplemental Documents

- Troubleshooting Output Manager
    - o Instances/Processes Options
    - o OM Logs
    - o Output Processing
    - o Resending Documents

Thursday | 8:00am – 12:00pm

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

Barcode Manager (PG)

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

DocLink Mobile (CC)

- DocLink Mobile
  - o Quick Search
  - o Capture
  - o Workflow Approvals

Troubleshooting (CC)

- DocLink Error Log Locations
- Service Monitor
- Session Monitor

Maintenance (CC)

- Database
- Image Repository
- Web Manifest Utility

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