

Trainers

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Agenda at a Glance

Monday | All Day Training

Fundamentals – Scan Requirements & System Settings

Auditing

Stamps & Notes

DocLink Security

Document Types & Properties

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

Web Client

Troubleshooting & Maintenance

Detailed Agenda*

Monday | 8:00am – 4:00pm

Breakfast (provided by Altec)

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

Scan Requirements (CC)

DocLink Scan Requirements

- Fax Server & Multi-Function Document Scanner Requirements
- How to Use DocLink Scan
(Prerequisite: Scanner with a SCSI Card or USB connection with an ISIS compatible driver)

System Settings (CC)

- Documents
- Folders
- Licensing and Registration
 - License Types
 - Repository
 - Workflow
 - Integrated Workflow
- How Licenses are Checked Out
- Global Settings
- LDAP
 - What is it?
 - Benefits
- Login Control
- SSRS
- SMTP
- Reports – Report Manager
- Print to DocLink
- Web-link
- Download Manager
- Indexing Paths
- Version Control

Auditing (CC)

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

Stamps & Notes (CC)

Lunch (provided by Altec)

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

4pm – 5pm Happy Hour with Altec – pizza and wine.
Location: Altec Office
23422 Mill Creek Drive, Suite 225,
Laguna Hills, CA 92653

**Transportation will be provided for those without cars.*

Tuesday | 8:00am – 4:00pm

Breakfast (provided by Altec)

Smart Form Toolkit (JC)

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

- Attachments

Lunch (provided by Altec)

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)

- Schedules
- Monitor
- Email Alerts
- Configuring Event Notifications
- Template Manager

Dinner (on your own)

Wednesday | 8:00am – 4:00pm

Breakfast (provided by Altec)

Automation (JC)

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

Lunch (provided by Altec)

ERM Capture (CC)

- Demo: How ERM Works
 - Reject, Index and Archive Folders for ERM
 - Start and Stop the ERM service
- ERM Printer
- ERM System Settings
- ERM Document Type Configuration
 - ERM Options
 - Setting Input Type
 - File Actions
 - Configuring ERM Documents by Content
 - Decollation
 - Decollation

- Mixed Document Types
- ERM Properties
 - Configuring ERM Properties
 - Configuring Property Groups
 - Scripting Properties
- Rendering
- ERM Templates
- Test Configuration
 - Restart ERM Service
 - Process Sample Spool File

Output Manager (CC)

- Demo: How OM Works
 - Print Sample Document
 - Expected Results in DocLink
 - Start and Stop the OM Service
- Troubleshooting/Monitoring OM Capture
 - Service Monitor – OM
 - Instances/Processes Options
 - OM Logs
 - Output Processing
 - Resending Documents
 - Batches
 - Batch Items
 - Service Configuration
 - Delivery Method Defaults
 - Purge Sent Items
- Configure Recipients
 - Standard vs. Dynamic
 - Delivery Methods
 - Routing List Assignments
 - Notes
- Configure Routing Lists
 - General
 - Configuring document type
 - Configuring conditions
 - Distribution
 - Recipients/method
 - Default delivery methods
 - Output options
 - Templates
 - File name templates
 - File attachments
 - Return email
 - Dynamic recipient property
 - Coversheet

- Failure notifications
 - Supplemental Documents
- Troubleshooting Output Manager
 - Batch View
 - Batch Items View and Relationship with Batches

Dinner (on your own)

Thursday | 8:00am – 2:00pm

Breakfast (provided by Altec)

Auto-Index and Retro-Index (JC)

- 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 (JC)

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

Barcode Manager (JC)

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

Configuring Multi-threading for Barcode (if applicable)

Lunch (provided by Altec)

Web Client/DocLink Mobile (CC)

- Quick Searches



- Workflow Approval

Troubleshooting (CC)

- DocLink Error Log Locations
- Service Monitor
- Session Monitor

Maintenance (CC)

- Database
- Image Repository
- Web Manifest Utility

Overflow (JC/CC) | Open Q&A (JC/CC)

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