PIF Technologies – Customer Educational Event

End User Education: 9:00 – 12:00

Welcome	9:00 – 9:10
Introduction of eclipse	9:10 – 9:20
Retrieve	9:20 – 9:40
Edit/Indexing	9:40 – 10:05
Break - Contest	10:05 – 10:15
Output	10:15 – 10:25
Capture	10:25 – 11:05
Workflow	11:05 – 11:35
Eclipse Client	11:35 – 11:50
Break for Lunch - Contest	11:50 – 12:00

Administration Education: 1:15 – 4:15

Welcome	1:15 – 1:25
Manage	1:25 – 1:45
Licensing	1:45 – 2:15
Break - Contest	2:15 – 2:25
Process	2:25 – 3:00
Workflow	3:00 – 3:30
System Settings	3:30 – 3:40
IT Administration	3:40 – 4:10
Break -Contest	4:10 - 4:20

Topic/Subject	Time/Length
End User Education	**9:00 – 12:00**

Introduction to eclipse
• Logging into Eclipse & how to navigate to program
• Eclipse user interface
    o Navigation panel (folders, inboxes and alerts)
    o Ribbon bar – retrieve, capture and workflow
	5m

Retrieve
    o How to create a saved search
    o How to use search bar and associated syntax
    o Use of wild cards
    o Results grid
        ▪ Sorting
        ▪ Column selector
        ▪ Global replace
        ▪ ACTIONS available within results grid
            • Export to CSV
            • Merge
            • Save a copy
    o Related Documents
    o Selecting multiple documents to view or index
    o User preferences – retrieve specific options
	20m

Edit
    ▪ Annotations
        • Permissions required
	25m

- Redactions
- Rotating
  - Modify Security at document level
  - Page Options
    - Scan – add, replace or insert page
    - Delete
    - Burst Content Item
    - Split Item
    - Reorder
  - Set Page Start
  - Move to
  - Delete
  - View Native
  - Requeue Imaging
  - Document History Panel

Indexing
  - Content Fields
    - Manual entry
    - Moving fields around in Content Fields
  - Lasso OCR
  - Zone OCR
    - Configure within Content Type builder when inside document viewer
    - OCR workflow step, Get Region
  - Full text content searching
    - Show Hits
    - Show Document Text

BREAK - CONTEST	10m
Output	10m

Output
- Revision Control
  - Check-in/out process
  - Promote previous versions
  - What permissions are required for versioning?
  - Using Microsoft Office for Check-In process
  - Version Control panel and ACTION menu item
  - Draft vs Published
    - Draft owner
- Email & Print filed documents
  - Attaching document in 4 file formats (zip, pdf, TIF or native)
  - Include annotation and redactions
  - Email internal hyperlink
  - Email external link
  - Password protect
  - Using SMTP or Outlook to send
- Save a Copy (Export)
  - Importance of title

Capture	40m

Capture
- Desktop Scan
  - Using client app for connecting to local scanner
  - Separation settings
  - Scan settings – dpi/resolution, type (b/w, color, greyscale), auto size detection
  - Use of workflow and Content Types
- Import of ad-hoc electronic documents
  - Client app for selecting multiple files through Browse
  - Auto view

Workflow	10m

○ Workflow ribbon bar item ○ What is Work Items? ○ What is Approval Requests? ○ What is Dashboard? ○ Creating ad-hoc/built-in Workflows ▪ Set Due Date ▪ Request Approval • "Approvals" panel ○ Reset, remove and assign workflows ○ Chat window ○ User preferences for workflow ▪ Submission button action	
Eclipse Client ▪ Print Driver ▪ Microsoft Office Connector for Eclipse ▪ Batch Import • Where to configure batch import • How to set timer for pickup of documents on timed basis • Email monitoring • Desktop drag n' drop functionality ▪ Kiosk Mode	15m
BREAK - CONTEST	10m
BREAK for Lunch	**12:15 – 1:15**
Administration Education	**1:15 – 4:15**
Manage • Users / Groups ○ Authentication providers. Configuring LDAP or SAML. ○ Admin rights – description of each feature access permission • Security Classes* • Password management • Buzz Space ○ Creating HTML content in Buzz space ○ Multiple Buzz spaces • Stamps ○ Creating image and text stamps • Index ○ Where is the document index stored? ○ Apache Tomcat windows service for SOLR ○ Reindexing database index for keyword searching	20m
Licensing • Review licensing configuration – where to review enabled/disabled licensing • Audit Trail • Recycle bin • Distributed Queue • Client application ○ Where to find executable ○ How to configure scanner ○ Batch importing ○ Import errors ○ Module installation	30m
BREAK – CONTEST	10m
Process • Content Type builder ○ Parameters	35m

▪ Related document linking
▪ Eye – show/hide fields
▪ ZONE OCR templating while in Document Viewer
 o Fields
  ▪ Data Type options
  ▪ Formats
 o Field Groups
  ▪ Line Item tabular data
 o Lists – how to create drop down lists and associate with field
• DataLink
 o Populating drop down lists via data link	

Workflow
• WorkflowDesigner
 o How to create new workflows
  ▪ One step vs multi-step workflows
  ▪ Building workflow logic – order of functions, one or multiple actions within a step
 o High level overview of the 73 functions
 o Explain the difference between client, user initiated and system triggered workflows
 o Inputs and Outputs
 o System variables (e.g. $Text, $Assignee)
• The difference between legacy docSTAR template vs eclipse Content Types and Workflows
• Records Management
 o Creating record categories
 o Record freeze/unfreeze
	25m

System Settings • IP Restrictions • System Settings – configuration settings and defaults	5m
BREAK - CONTEST	10m
IT Administrator • Eclipse setup and installation executable o Upgrading and installing eclipse o Changing mail and server settings • Window Services – what each eclipse window service o Automation Service o Database Maintenance o Distributed Queue Monitor o Import Job Mainteance o LDAP Monitor Servuce o License Monitor Service o Records Management Service o Schedule o Workflow Management • Cloud backup o Desktop Cloudberry application o Changing frequency of backup	30m