

TRAINING COURSES AND DESCRIPTIONS



TRAINING OVERVIEW



Maximize the Performance of Your Investment

Thorough and relevant training is critical in helping staff to maximize the use of the powerful tools you are entrusting to them. Training eases the transition to DocFinity® and helps managers, IT staff, and end users envision the most effective ways to use the products to streamline work within their company.

Training is offered at our offices, on-site, or interactively through the web. Self-paced training is also available via the DocFinity Online Training Portal. Our comprehensive training curriculum includes training for database and network administrators as well as end users. Our courses cover:

- DocFinity products
- system architecture
- security
- functionality
- benefits
- user interfaces
- maintenance
- and more...

Administrator-based training courses focus on simplifying and effectively administering the software, as well as designing automation processes to run smoothly behind the scenes.

We offer foundation courses for end users covering scanning and administration, as well as in-depth training on modules such as DocFinity BPM/Workflow, eForms, API, COLD, Dashboards, and Records Management.

Detailed instructional and reference materials are included with each course, and a certificate of completion is awarded to attendees who complete each class or course. Learn more about the monthly series of training courses that are available for DocFinity users.

Self-Paced Training



Optical Image Technology is pleased to offer self-paced, web-based training of all courses as an available option for its DocFinity Version 10 customers. This option allows attendees to set their own pace in learning the prepared course material, while still having the advantages of instructor-led group activities. Activity handouts will be made available before each instructor-led group activity. Access to the online interface is not restricted to traditional desktop/laptop computers; it can also be used on mobile devices. Project handouts of the PowerPoint slides, and also full DocFinity manuals in PDF format, can be made available to attendees, if desired.

There are several considerations to keep in mind when choosing self-paced, web-based DocFinity Course Training. While attendees are encouraged to go at their own pace in studying the course materials, ALL the named attendees must attend the activity sessions together at the same time. This date and time must be scheduled beforehand to ensure attendee and instructor availability. Named attendees will be provided with 6 months of online system access, so the full course should be completed within that time frame. Unlike a standard training class, fees for self-paced training are billed at the time that the Statement of Work (or Fast Track document) is signed.

We're Here to Help

OIT's professional services team values the uniqueness of our customers and their individual needs. Our staff partners with each and every customer to ensure the success they expect and deserve.

If you would like to speak with a member of our services team to discuss training opportunities, please contact us at training@docfinity.com. To view our training schedule, go to www.docfinity.com/support/schedule.



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Course Description

DocFinity 101 is the first day of the CORE Training and the keystone course of the Training Program. This high-level overview of the DocFinity software solution provides the foundation necessary for applying DocFinity to daily practices. This course covers core concepts that all other course content assumes as basic knowledge. End-user tools and administrative overviews are covered in this course.

This root course includes a description of electronic document management and the benefits, features, and core functionality of DocFinity.

DocFinity 101 also provides a description and demonstration of the main functions, actions, and operations available to users. Fundamental DocFinity terminology is also defined and the user interfaces are shown. Also included is an introduction to DocFinity Business Process Management, eForms, and Records Management.

Target Audience

This course is valuable to administrators, DocFinity system managers, IT personnel, network administrators, database administrators, company trainers, and system design team members who are new to version 10 of DocFinity. All subsequent courses use DocFinity 101 as a building block to those respective courses.

Course Syllabus

Introduction

- What is DocFinity?
- How does DocFinity work?
- Software Features
- User Interface
- Workspaces and Panels

Introduction to Searching

- Search Results
- Document Viewer

Document Classification

- Categories
- Document Types
- Metadata Objects

Searching

- Category Search
- Tree Search
- Template Search
- Checklist Search
- Enterprise Search

Document Capture

- Scanning
- DocFinity Desktop Integration
- Upload Files
- Send To/Print To
- Scan To
- Office Integration

Indexing

- Batches
- Index Configuration

Search Results, Document Output

- Interacting with Documents and Data
- Editing and Versioning Documents

Document Viewer

- Document Viewing Methods
- Markup and Annotations
- Redactions

DocFinity Mobile

- Upload
- Search
- Viewing Documents

eForms Overview

- Forms Workspace

BPM Overview

- Job Assignments Workspace
- Job Views
- Job Queues

Records Management

- Records Management Workspace
- File Plans and Retention Policies
- Legal Holds



Duration: 3 Days

To enroll, please contact training@docfinity.com.

Prerequisite Courses

- DocFinity 101

Course Description

DocFinity Administration consists of days 2-4 of the DocFinity CORE Training. This course provides the hands-on, security administration of groups and users needed to secure your organization's sensitive information. The document architecture setup is covered in depth, including the Document category and document type classifications used for metadata assignment, scanning profiles, and indexing profiles. Leveraging functionality like datasources and validators to ensure your capture is efficient and correct is also addressed, along with importing from file directories and email drop points. Administrators are also taught how to plan for easy and efficient document retrieval by designing useful searches for end-users. Managing functions behind the scenes such as batches, scan profiles, deleted documents, licensing, and server setup are also covered.

DocFinity Administration provides a description and demonstration of the main functions, actions, and operations available to DocFinity administrators. Fundamental DocFinity terminology is also defined and the administration interfaces are shown.

Target Audience

This course is valuable to administrators, DocFinity system managers, IT personnel, network administrators, database administrators, company trainers, and system design team members. Subsequent courses use DocFinity Administration as a building block to those respective courses.

Course Syllabus

User Management

- Add Users
- Reset Password
- LDAP Users
- Groups

Document Classification and Security

- Document Classification Overview
- Categories
- Document Types
- Metadata Objects
- Assign Metadata Objects to Document Types
- Document Type Security
- Metadata Filter Security Permissions

Indexing

- Indexing Configuration
- Indexing Properties

Searching

- Category Search

- Template Search Configuration
- Checklist Search
- Stored Procedure Search
- eForms as Search Output

Data Setup

- Database Connections
- Datasources
- Searching with Datasources (Linked Output Columns)
- Validators
- Web Services

Document Administration

- Scanning Administration
- Batch Management
- Deleted Documents
- Edited Documents
- HSM (Hierarchical Storage Manager)

Licensing

- Dedicated Licenses

- Group Licenses
- License Monitoring
- License File

Administration System Menu

- Repositories
- Servers
- Logging
- Printers and Faxes
- System Transfer
- Hot Keys
- System Properties

Importers

- Index Importer
- Object Importer
- Object Importer, Subfolders
- Object Importer, Datasources
- Email Importer
- Using Conditions to Set Rules



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Prerequisite Courses

- DocFinity 101
- DocFinity Administration

Course Description

DocFinity System Design is day 5 of the CORE Training. This course gives the design team the tools necessary to develop their own DocFinity system. Topics include gathering a document inventory, establishing metadata, scanning requirements, search methods, and security needs to develop an indexing plan. This course steps the student through a typical departmental discovery through design process, with hands-on exercise using design documents to configure the system design.

Target Audience

This course is valuable to administrators, DocFinity system managers, IT personnel, network administrators, database administrators, company trainers, and system design team members.

Course Syllabus

What is System Design?

System Design in DocFinity

Design Tools

Content Inventory

- Cataloging
- Grouping

Metadata

- Document Assessment
- Searching Needs

Content Modeling

- Categories
- Document Types
- Metadata Objects

Assigning Metadata

- Editable Objects
- Required Objects
- Display Value
- Indexing Order

Configure Indexing

- Datasources
- Validators

Group Management

- Business Unit Model
- Functional Model
- Security Groups
- Feature Right Groups
- Searching Groups

Searching

Capture

- Scanning Assessment
- Scan Profiles
- Importing



Duration: 5 Days

To enroll, please contact training@docfinity.com.

Prerequisite Courses

- DocFinity 101
- DocFinity Administration

Course Description

Learn about the DocFinity Business Process Management tools – Designer, Monitoring, Administration, Job Assignments – and how they work together to automate and manage a paperless business process. Configuration, setup and use of each component are covered in this course, along with the presentation of a formal methodology to help you manage your BPM project.

The BPM Designer is explored in detail as attendees learn the terminology, components, configuration options, and theory used in building business process designs. Build a variety of process models using the Designer's interface and learn tips to enhance your models. Designers will learn how to customize process models to work with your own data and documents, and to integrate with your own systems. Also presented in this course is BPM Monitoring, including how to manage BPM models and troubleshoot business process instances. BPM Administration is also covered, including all aspects of DocFinity Administration that affect BPM design and implementation. Attendees will learn to build custom job views and thoroughly navigate all options in the Job Assignments workspace.

Target Audience

This course is most valuable to BPM designers and analysts, and DocFinity system administrators. The course includes many hands-on activities and in-depth discussions of all BPM-related concepts and configurations.

Key Concepts

Some of the key terms and concepts that will be covered for Designers are as follows:

- Process Designer Functionality
- BPM Monitoring
- BPM Administration
- Distribution methods
- User, Server, Hold and Subprocess Activities
- Task Types
- Activity and Task Libraries
- BPM Package Items and Variables
- Decision, Fork and Join Gateways
- BPM and Checklist Search
- Subprocesses
- Job Views



Course Syllabus

Day 1

1. Introduction

- BPM Benefits
- Terminology
- BPM Components
 - Process Designer
 - Process Monitoring
 - Process Administration
 - Job Assignments Workspace
 - Starting Business Process Jobs
- Process Initiating Methods

2. Process Designer Overview

- Overview
- Design Toolbox
- User Activities
- Configuration Panel
- Overview of Design Process
- Process Designer Menus

3. Distribution Methods

- Distribution Methods and Configuration
- Distribution w/ Variables
- Distribution and Attendance

4. BPM Administration and Admin Review

- BPM Feature Rights
- Concept of BPM Groups
- Turn on Logging for BPM
- Document Classification and Business Processes
- Importing
- DB Connections and Datasources
- Web Services
- Roles and Proxies
- Business Hours
- Business Holidays
- Shifts

5. Process Monitoring

- Business Processes
- Instance Details
- Server Alerts, My Desktop

Day 2

6. Process Instance Variables

7. Package Item Properties

8. User Activities

- Job Priority
- Due Date
- Elapsed Time
- User Task Library
- Standard Task
- View Document
- Move to Personal Queue
- Run Saved Search
- Reindex Document
- Open Diary
- Prompt Task
- Open New Form
- Open Existing Form
- Change Job Due Date
- Run URL

Day 3

9. Server Activities

- Import to DocFinity
- Add Package Item
- Send Email
- Index Metadata
- Set Process Instance Variable, with datasources
- Set Package Item Properties
- Add Diary Entry
- Run Stored Procedure
- Run Web Service
- Run URL Service Task
- Run Executable
- Delete Document

- Change Repository

- onEnter, onLeave Service Tasks
- eForms and BPM Capabilities

Day 4

10. Hold Activity

- Hold Settings
- Hold for Checklist
- Evaluate Hold Release Methods

11. Gateways

- Fork
- Gather Join
- Decision Gateway
- Macros

Day 5

12. Job Views

- Basic Filters
- Configure Columns
- Priority and Forced Sort
- User Prompts and Filters
- Heads Down Task Processing

13. Subprocesses

- Subprocess Configuration
- Send/Receive Variables and Package Items
- Process Monitoring and Subprocesses

14. Business Process Methodology

15. Review and Design Time



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Course Description

Learn about the DocFinity Business Process Management tools – Designer, Monitoring, Administration, Job Assignments – and how they work together to automate and manage a paperless business process. Configuration, setup and use of each component are covered in this course, along with the presentation of a formal methodology to help you manage your BPM project.

Attendees will learn all of the options available in the Job Assignments workspace, where end-users interact with jobs and document. An overview of the BPM designer is presented, and attendees learn the terminology, components, and theory used in building a business process design, including distribution and user tasks. Also presented in this course is BPM Monitoring, including how to manage BPM models and troubleshoot business process instances, and BPM Administration, such as setting up business process calendars and roles.

Target Audience

This course is most valuable to BPM managers and trainers. The course includes high-level discussions of all BPM-related concepts and provides valuable insight for implementing and managing a BPM project.

Key Concepts

Some of the key terms and concepts that will be covered for Managers are as follows:

- Process Designer overview
- User, Server, Hold and Subprocess Activities
- User Task types and options
- Distribution methods

Attendees will come out of this course with knowledge of the following Monitoring options:

- Activating, Deactivating, Importing, Exporting and Deleting Process Models
- Viewing and Locating Process Instances
- Viewing Process Instance Errors
- Viewing Package Items
- Viewing BPM Server Alerts for errors

Attendees will come out of this course with knowledge of the following BPM-related options in DocFinity Administration:

- BPM Groups and Users
- BPM-related feature rights
- Roles and Proxies
- Business Hours
- Business Holidays

- Shifts
- Job Views

Learn how to perform actions in the Job Assignment workspace, such as:

- Navigate Job Views
- View Personal and Common Queue jobs
- Check out Jobs
- Set a Job Priority
- Release a Job from Hold
- Complete tasks
- Move jobs

Learn how to manage your BPM project using a formal methodology that includes the following steps:

- Choose a process to implement
- Observe and document existing processes
- Analyze Processes
- Build a prototype
- Test and modify
- Implement into Production
- Train
- Measure



Duration: 2 Days

To enroll, please contact training@docfinity.com.

Prerequisite Courses

- DocFinity 101
- DocFinity Administration

Course Description

DocFinity eForms attendees will create and processes electronic, web-based forms and documents that are integrated into the DocFinity business process and document management suite. The class will cover eForms administration, design, and process integration, with hands-on activities that illustrate these concepts.

Target Audience

This course is most valuable to form designers, process designers, process analysts, and DocFinity system administrators. The course includes many hands-on activities and in-depth discussions of eForms and BPM-related concepts and configurations.

Course Syllabus

Day 1

Introduction and Overview

- Submitting Forms
- Searching Forms

Form Designer Overview

- Form Designer Menus
- Design Toolbox
- Canvas
- Configuration Panel
- eForms Administration

Index and Import Submit Action

- Configure Submit Action
- Index Field Mapping
- Form Components and Controls
 - Basic Components
 - Entry Controls
 - Entry Control Properties
 - Checkbox
 - Date Field
 - Drop-down List
 - List Box

- Text Area
- Text Field
- Form Styles

Form Control Configuration

- Datasources
- Form Control Properties
- Conditional Form Controls
- Macros
- Validation
- Search Results and eForm Output

Day 2

Submit Actions

- Display Feedback
- Load External URL
- Load Form
- Send Email
- Create PDF
- Write to Table
- Datastores

Multi-step Forms

- Go To Step Submit Action
- Complete Form Submit Action

Business Process Integration

- eForms/BPM capabilities
- Start Business Process Submit Action
- BPM User Tasks for eForms
- Form Package Item Properties
- BPM Form Variables
- BPM Create Form Service Task



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Course Description

System integrators are immersed in teachings of both the DocFinity URL API and the DocFinity Web Services API. Attendees learn the fundamental structure of URL construction when working with the DocFinity URL API and interact directly with a subset of the vast capabilities of the DocFinity Web Services API. Demonstration of the DocFinity URL API will instruct participants how DocFinity can simply and quickly integrate with other business applications. Participants will leave the class knowing how to instruct DocFinity (via URL API) to interact and perform functions based on business needs.

Interaction with the DocFinity Web Services API shows attendees the capabilities and possibilities available for integration. The DocFinity Web Services API interacts directly with DocFinity data and is the same Web Services API that is used by the DocFinity UI. Participants view WSDLs and interact directly with the Web Services via soapUI (an open source Web Service communication tool) which is the same tool used by OIT to test and support the Web Services.

The samples and exercises provided in the class give a very strong foundation of DocFinity API knowledge that allows participants to immediately use and understand concepts needed for integration with 3rd party applications.

Key Concepts

Attendees will come out of this course knowing about:

- DocFinity Authentication Methodology
- DocFinity URL API
- DocFinity Web Services API
- API support structure
- API change control

Target Audience

This course is designed for integration stakeholders/developers. A knowledge of Web Services and core DocFinity functionalities is recommended.

Course Syllabus

DocFinity URL API

- Authentication
- Document Lifecycle
- URL API Assistant and Building URLs
 - Open batches
 - Viewing documents
 - Uploading files
 - Viewing BPM jobs
 - Searching

DocFinity Web Services API

- Overview of public Web Services
- DocFinity Servlets
- Using SoapUI
 - Uploading and indexing a file
 - Retrieving and marking up a document
 - Initiate and completing a process instance



Duration: 2 Days

To enroll, please contact training@docfinity.com.

Course Description

This course is designed to provide an understanding of how various print streams can be manipulated to be “DocFinity-Ready” and made available for retrieval by various business functions like any other object stored in the DocFinity System. The focus of this course is on identifying various print streams and the tools necessary to format output, extract index values and commit the results to the DocFinity Document Management System.

Target Audience

Attendees of this course should be Administrators or Supervisors working with the DocFinity system. Network and Database Admins would gain valuable information about the module and its integration with the DocFinity system while System Administrators and Business Supervisors learn useful configuration information. Users of COLD products would benefit from attending this course as well, though we recommend that they be familiar with the product before attending. Company trainers are also recommended to attend.

Course Syllabus

Day 1

What is COLD-ERM?

Viewing the raw report

COLD Importer

Creating a Script

- Conditions
- Pagination
- Coalescing
 - Fixed Key
 - Pattern Key
 - Repeating Patter Key
- Transform Task
- Manifest Task

Building a Script for Fixed Key Report

Building a Script for Pattern Key Report

Building a Script for Repeating Pattern Key Report

Working with Regular Expressions in

Scripts

- Literal Characters
- Special Characters
- Anchors
- Characters
- Quantifiers
- Character Classes
- Character Escapes

Day 2

Working with Overlays

Report Definitions – Coded Print Streams

- Working with Adept
- Importing Adept Reports into DocFinity



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Course Description

The DocFinity Records Management module is designed to help you comply with your own corporate record retention policies, government regulations, and record retention and discovery for legal cases. Records Management automates complicated and intense company policies that are burdensome. By enforcing policies and regulations with the automated features, Records Management offers a necessary protection.

Target Audience

This course is valuable to Record Managers who are responsible for the retention and disposition of documents in their system.

Course Syllabus

- Terminology & Features of Records Management
- Creating Retention Policies
- Setting Disposition
- Setting File Plans
- Records Search
- Legal Cases and Legal Holds
- Security
- Exporting Records
- Records Management & BPM



Duration: 1 Day

To enroll, please contact training@docfinity.com.

Course Description

SQL 101 class is a one day Training of SQL. This particular course aims to provide non-DBAs(Database Administrators) everything they need to know about the basics of Structured Query Language. Basic Database Concepts, Relational Database, SQL Queries and Syntax are discussed in this course among other topics.

Target Audience

This course is valuable to anyone (IT and non-IT) interested in learning the basics of Structured Query Language (SQL).

Course Syllabus

Database Concepts

- What is a Database?
- Entities, Attributes, Relationships
- Tables – Columns, Rows, Data Types

SQL (Structured Query Language)

- What is SQL?
- Capabilities of SQL
- What is a Query?
- SELECT-FROM-WHERE
 - Retrieving Individual Columns
 - Retrieving Multiple Columns
 - Retrieving All Columns
- Sorting

- Filtering
 - Using Compound Conditions
 - Order Of Evaluation
 - Wildcard Filtering
- Date Types
- Date Manipulation
- Creating Calculated Fields
- Summarizing Data
- Subqueries
- Multiple Table Queries
 - Types of Join
 - Combining Queries
 - Using Case Expressions



Duration: 2 Days

To enroll, please contact training@docfinity.com.

Course Description

The DocFinity Dashboard class is comprised of two days. The first day will concentrate on using SQL to gather your Key Performance Indicators (KPIs) and how to create Datasources in DocFinity for those. The second day will show you how to use those datasources to create charts and dashboards for reporting purposes.

Target Audience

This course is valuable to those Administrators, Managers and Reporters who want to build charts and dashboards to report on valuable data from DocFinity.

Course Syllabus

Day 1

Terminology

Capturing Data

Using the Data

Pre-Built Dashboards

- System Health
- Documents
- BPM

Building Dashboards

Building Charts

- Area Graph
- Bar Chart
- Gauge
- Line Graph
- Pie Chart
- Table
- Text

Adding Charts to Dashboards

- Set Input Parameters
- Drilldowns

Manage Dashboards

Day 2

Overview of Dashboards

- What drives a Dashboard
- How to use the data

Key Performance Indicators (KPIs)

- Definition
- Types
- DocFinity KPIs
- DocFinity Audit System
- Auditing KPIs

Stored Procedures

- Definition
- Use cases
- Advantages/Disadvantages
- Creating Stored Procedures

Datasources

- Definition
- Types
- Creating Datasources from KPIs



Duration: 2 Days

To enroll, please contact training@docfinity.com.

Course Description

This course is designed to provide an understanding of document processing system - Intelligent Capture (IC). The focus of the course is to explain the system's structure and the course presents features of the software and individual elements of IC. The audience of this course will learn how to leverage IC technology to capture structured and unstructured documents. This 2 Day course will cover among other topics – scanning and indexing paper document, optical character recognition, automatic document classification, form recognition, and invoice recognition and data extraction.

Target Audience

This course is valuable to the users and Administrators who want to learn what IC is capable of. The 2 day course material include demos and hands-on activities for the attendees to learn about different components and capabilities of IC Technology.

Key Concepts

Some of the key concepts that will be covered during the training are:

- System Layout
- System Components
- Designing and Developing of Applications and Solutions

Course Syllabus

Day 1

Introduction and overview

Steps in Intelligent capture

- Capture
- Analyze
- Release

System Overview

Cockpit – Management and Configuration tool

- System View
- Production View

System Layout

- Core Components
 - WOM Server
 - Node Agent
 - Cockpit

- Production
 - Import
 - Analyze
 - Verify
 - Export

- Administration
 - Designing tools

- Solution Designer
 - Classification
 - Extraction
 - Barcode
 - OCR Zone

Scan to DocFinity

Export to DocFinity

Day 2

Developing and Designing tools

- Designer
 - Defining rules
 - Page Layout Identification
 - Region Template
 - Document Template
 - Document Definition
 - Page Type Detection



100 Oakwood Avenue, Suite 700, State College, PA 16803 | 800.678.3241 | www.docfinity.com



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