

Document Locator Training

Boot Camp Training

*Join us for a comprehensive three-day
Document Locator training session.*

Our Boot Camp training is an ideal way to develop skills at nearly everything in the document management system. The in-depth, hands-on sessions provide a thorough study of document management procedures and best practices. Administrators and users gain from expert knowledge of system functionality. You will learn about:

- Profiles and properties
- Document import
- Document modification
- Searching
- Views and column configuration
- Document retention
- Workflow
- Security
- Folder structure manager
- Auto path templates
- Document information (metadata)
- Scanning
- WebTools Web access

More training options



DL Masters Series

Expand skills in specific areas of document management like reports, workflow, and more. DL Masters courses are 1-day training sessions held periodically that cover a single topic in detail. They provide a thorough understanding of functionality and business benefits.



Custom training event

Custom and onsite training options provide full flexibility in aligning a training event to your own objectives. For example, you might want to train a large number of users in focused tasks; or you might want to train a group of admins on advanced operations. Whatever the need, Professional Services will work with you to plan a successful training event.

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By attending your training session, I have managed to learn even more helpful information and to focus more on the areas we currently do not use that we would like to begin implementing.”

**Prairie State
Generating Company**

(800) 298-1172
www.ColumbiaSoft.com

Boot Camp training program

Day One | Getting Started

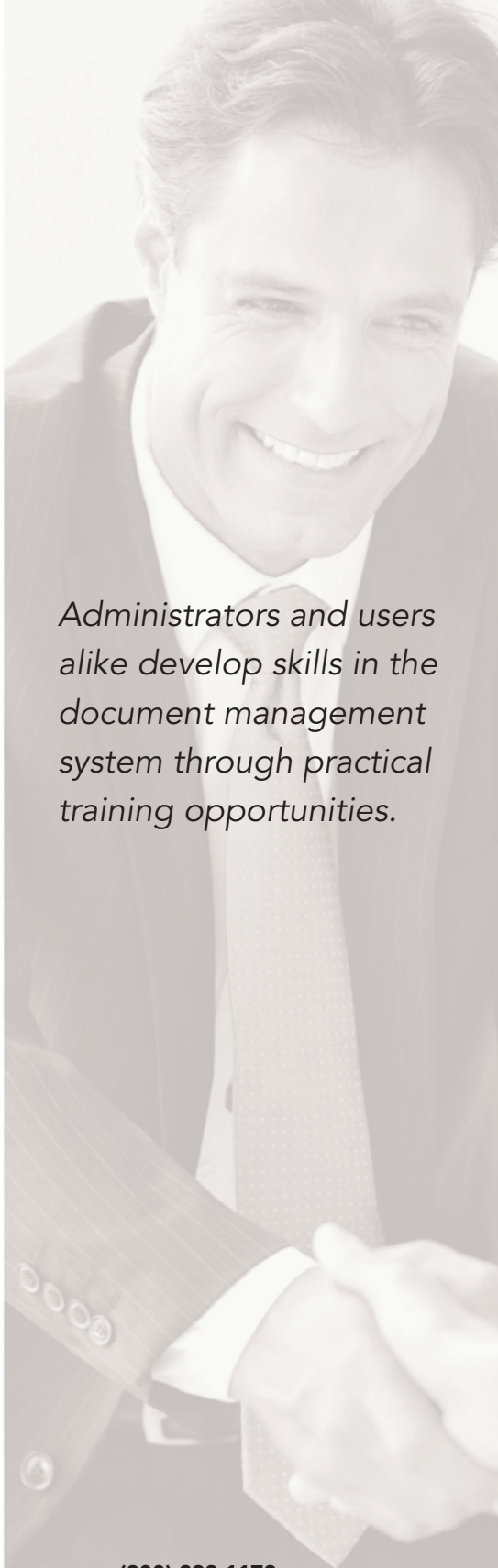
- **Introduction** – Discussion of unique needs where students outline their goals so instructors are sure to focus on important areas and provide tailored tips.
- **Folder Tree** – Why is the folder structure so critical to a good DL implementation? How to design a folder structure that helps your users (or you as the admin).
- **Profiles and Properties** – What is a profile, meta data or indexing? Why is it the heart of the DL system? All about basic properties and profile settings. How to design a profile.
- **Column Configuration Manager** – Extend Windows Explorer to show users the meta data they want to see as (sortable) column headings.

Day Two | A Challenging Day

- **Working with Documents** – How to USE the system. Administrators can customize the slides from this section to create their own end user training class.
- **Advanced Properties** – More depth on properties, how to connect DL to another system of record (ERP, HR system, Accounting System, etc...) so values in the target system can be looked up by DL. Create auto generated properties, use them to name files or create new properties.
- **Retention Policies** – How to apply your corporate retention policies. How to use the “alarm clock” of retention policies for various purposes (there’s more to it than just deleting files).
- **Workflow Foundations** – Automation! Learn how to use DL workflow to streamline repetitive tasks and add consistency to your processes (advanced training available in the Master Class).
- **Folder Structure Manager** – Create folder structure “templates” that can be used over and over again to set all the folder properties. Create complex folder structures in a single stroke (great for repeating things like Employee, Customer or Vendor folders).
- **Advanced Searching** – Learn how to use DL’s powerful search features to create repeatable searches that can be shared with your users.
- **Security** – How (and why) to create users and groups, secure files and folders, how to use security groups for general purposes. Active directory vs. SQL server user accounts.

Day Three | Wait, There’s More

- **Scanning** – How automation magic can be created with scanning of consistently formatted documents.
- **WebTools** – How does it work? How do we configure it?
- **Resources** – Where do I go from here to get more info on the things I’ve learned this week? Where do the experts go to get information? How can I learn about the DL API or other advanced topics? Where can I send my users for tutorials?
- **General Consulting** – As time permits, discuss ideas and ask questions about your DL implementation. We are happy to provide design tips and advice (it makes great classroom discussion).



Administrators and users alike develop skills in the document management system through practical training opportunities.

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