

Course Details

Prerequisites	Reseller: Square 9 System Engineer (SSE) or Certified Square 9 System Architect (CSSA) Customer: Square 9 Power User (SPU) or Square 9 System Manager (SSM)
Certification:	Advanced GlobalForms Engineer (CGAE)
Objective:	Development of the necessary skills required to effectively design and implement GlobalAction as part of a GlobalSearch solution.
Duration:	Three Days
Cost:	Contact your Regional Sales Manager or Authorized Reseller for more details
Requirements:	Attendees are required to have a laptop computer running Windows (64-bit) 7, 8/8i, or 10. The laptop must have at least 50 GB of free hard drive space for the VM, and we strongly recommend at least 6 GB of RAM. The user must have local administrative rights in order to install and configure the virtual machine software they will be required to download and install prior to coming to class. Class will run on virtual machines (VMs) on which the Square 9 products have been installed. Virtualization must be enabled in the BIOS in order for the VM to run.

Topics Covered:

- An introduction to workflow discovery and the planning process
- GlobalAction Nodes: what they are and how to use them
- Workflow architecture and deployment
- Database design considerations, best practices
- Advanced workflows/solutions exercises
- Multi-state approval
- Email notification strategies
- Manual and automated processes

Course Syllabus

- 1. Introduction to GlobalAction**
 - a. What GlobalAction Workflows are and how they differ from Capture Workflows and Document Workflows
- 2. Discovery and planning**
 - a. What we ask and why we ask it
 - b. Building the Field Catalog
 - c. Building the Archive Structure
- 3. GlobalAction**
 - a. Create, Manage, Delete Workflow Nodes
 - b. Workflow Nodes, with Exercises

i. Initiator

ii. End

iii. Condition

iv. Email

v. Export Data

vi. GlobalForms

vii. Move

viii. Note

ix. Set Field

x. Set Property

xi. Wait

xii. Call Assembly