

## Course Details

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<b>Target Audience:</b>	Reseller Technical Professionals
<b>Certification:</b>	Certified Square 9 System Architect (CSSA)
<b>Objective:</b>	Development of the necessary skills required to effectively design and implement a GlobalSearch Solution.
<b>Duration:</b>	Two-day Webinar, Five-Day Classroom
<b>Cost:</b>	Contact your Regional Sales Manager or Authorized Reseller for more details
<b>Requirements:</b>	<b>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.</b>

### Topics Covered in CSSA:

- GlobalSearch Desktop Client and Web Client User Features
  - Understanding Capture and Index through the use of a variety of tools including Import, KeyFree Indexing, Data XChange and File XChange
  - Running Searches with different approaches including variable, static, Boolean and Content Search
  - Managing document editing and output via features such as merging and appending documents, annotating, printing exporting and emailing
- GlobalSearch Desktop Client and Web Client Administration Features
  - Designing and building the system objects including Inboxes, databases, the Field Catalog and Archives
  - Establishing system, Inbox, database, document, and feature-level security
- GlobalCapture and GlobalAction
  - Understanding Workflow architecture and deployment
  - Considering database design implications and best practices
  - Working in GlobalCapture
    - GlobalCapture Designer
    - GlobalCapture Nodes
    - Simple Data Extraction Templates
    - Batch Manager
    - Solution Development
  - Working in GlobalAction
    - GlobalAction Designer
    - GlobalAction Nodes
    - Solution Development
- Installation
  - Understanding Prerequisites, supported environments, recommended hardware
  - Performing Server Installation

## Course Syllabus, CSSA Part 1

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1. **Introduction to the Desktop Client**
2. **Vocabulary**
3. **Tour the Interface**
  - a. The Ribbons
  - b. The Desktop
  - c. The Results Grid
    - i. Sorting
    - ii. Arranging Columns
    - iii. Limiting Results
  - d. The Image Viewer
    - i. Thumbnail Manipulation
    - ii. Orientation
    - iii. Scaling
4. **Capture**
  - a. Drag & Drop
  - b. Import
5. **Index**
  - a. KeyFree Indexing
  - b. Data XChange
  - c. Other Tools: Pick Lists, Formats, System Fields
6. **Capture & Index**
  - a. Drag & Drop
  - b. Import
  - c. File XChange
  - d. Import Data & Documents
  - e. SmartCapture
7. **Search, create (Admin) and run (user)**
  - a. Static, Variable
  - b. Equals, Contains
  - c. Simple, Complex (Boolean)
  - d. Single Archive, Multiple Archive
  - e. Multiple Values, Multiple Fields
  - f. Date Math
  - g. Content Search
  - h. Image Xchange
8. **Edit**
  - a. Annotations
  - b. Image Enhancement
  - c. Merge, Append
  - d. Burst
  - e. Page Edits: Cut, Copy, Paste, Insert, Replace, Delete
  - f. Versioning, Check Out/In

- g. Launch, Launch Table
- h. Document History

#### 9. Output

- a. Print
- b. Export Documents
- c. Export Data
- d. Email Documents
- e. Reminder: Capture Workflow – release to file

#### 10. Introduction to the Web Client

#### 11. Tour the Interface

#### 12. Capture & Index

#### 13. Search

#### 14. Edit

#### 15. Output

## Course Syllabus, CSSA Part 2

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### 1. Inbox Administration

- a. Create, Manage, Delete
- b. Security

### 2. Database Administration

- a. Create, Manage, Delete
- b. DB Security
- c. Field Catalog/Field Administration
  - i. Create, Manage, Delete
    - 1. Data Types
    - 2. Formats
    - 3. System Fields
  - ii. Lists, Dynamic Lists
  - iii. Table Fields
- d. Creating Archives, Views
- e. Archive Security

### 3. Workflow

- a. An introduction to workflow discovery and the planning process
- b. Workflow architecture and deployment
- c. Database design considerations, best practices

### 4. GlobalCapture

- a. Create, Manage, Delete Workflow Nodes
- b. Workflow Activities, with Exercises
  - i. Import/End

- ii. Validate
    - iii. Condition
    - iv. Send Email
    - v. Export Data
    - vi. Release
    - vii. Others...
  - c. Data Extraction Methods
    - i. Process Fields
    - ii. Templates
  - d. Batch Manager
- 5. **GlobalAction**
  - a. Create, Manage, Delete Workflow Nodes
  - b. Workflow Activities, with Exercises
    - i. Start/End
    - ii. Condition
    - iii. Set Fields
    - iv. Move To Archive
    - v. Send Email
    - vi. DataExport
    - vii. Others...
- 6. **Installation Prerequisites**
  - a. Pre-requisites for installation/checklist
  - b. Hardware and Software Requirements
- 7. **Installation**
  - a. Custom Installation including File Locations and Feature Selections
  - b. Database Installation including Existing SQL vs. New SQL
  - c. Web Services Installation including Port Selection
  - d. Final Installation Steps
- 8. **Add-on Components**