

## Course Details

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- Target Audience:** Customer Knowledge Workers, SmartSearch Administrators
- Objective:** Development of the necessary skills required to set-up, maintain and grow your GlobalSearch system. Learn all the basic features, options and configuration settings.
- Duration:** Two 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:

- 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 Administration Features
  - Designing and building the system objects including Inboxes, databases, the Field Catalog and Archives
  - Establishing system, Inbox, database, document, Search and feature security

## Course Syllabus

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1. **Introduction to GlobalSearch**
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
  - c. File XChange
  - d. Capture Workflow, Part 1 (Admin)
  - e. SmartCapture
5. **Index**
- a. KeyFree Indexing – Use
  - b. Data XChange
  - c. Other Tools: Pick Lists, Formats, System Fields
6. **Capture & Index**
- a. Import Data & Documents
  - b. Capture Workflows, Part II (Admin)
    - i. Templates
    - ii. Import Data & Documents
    - iii. Release to Archive
7. **Searching, 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. **Editing**
- 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. **Inbox Administration**
- a. Create, Manage, Delete
  - b. Security
11. **Database Administration**
- a. Creating, Manage, Delete
    - i. Including DB Security
  - b. Field Catalog/Field Administration

- i. Create, Manage, Delete
  - 1. Data Types
  - 2. Formats
  - 3. System Fields
- ii. Lists, Dynamic Lists
- iii. Table Fields
- c. Creating Archives, Views
- d. Archive Security

## 12. Add-on Components