

2 Day Technical Class Agenda (SSM)

1. Introduction to GlobalSearch
2. Vocabulary
3. User Functions in the Desktop Client
 - a. Tour the Desktop Client
 - b. Manual Capture
 - I. Import
 - II. Drag & Drop
 - c. Manual Index
 - I. KeyFree Indexing
 - II. Data XChange
 - III. Other Tools: Field Lists, Formats, System Fields
 - d. Manual Capture & Index
 - I. Import
 - II. Drag & Drop
 - e. Search
 - I. Create (Admin)
 - II. Run (User)
 - f. Edit
 - I. From the Document List: Merge, Append, Move
 - II. In the Document Viewer: Annotations, Burst, Cut/Copy/Paste, Insert/Replace/Delete, Versioning, Check Out/In, Launch
 - g. Output
 - I. From the Document List: Print, Export, Email
 - II. From the Document Viewer: Print, Export
4. User Functions in the Browser Client
 - a. Tour the Browser Client
 - b. Manual Capture& Index
 - c. Search
 - d. Edit
 - e. Output
5. User Functions with GlobalSearch Extensions
 - a. PDF Print
 - b. Scan
 - c. Export from Browser Client
 - d. Email from Browser Client
 - e. Launch from Browser Client
 - f. Bulk Update in Browser Client
 - g. File XChange
6. Administrator Functions in the Browser Client
 - a. Inboxes – create, modify, secure, delete
 - b. Databases – create, modify, secure, delete
 - c. Data Objects – create, modify, secure, delete
 - d. Data XChange Configuration
7. Overview of Add-on Components