



square9[®]
softworks

GlobalSearch[®] Customer User Education Roadmap

1 Getting started with GlobalSearch[®]

Take: Square 9 System Manager (SSM)

If You Will Be: Using GlobalSearch, either in the browser client or the desktop client

Because It Covers: User Functions, Admin Functions





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GlobalCapture[®] Customer IT/Power User Education Roadmap

1 Getting started with GlobalCapture[®]

Take: Certified GlobalCapture Engineer video series (CGCE)

If You Will Be: Designing and building Workflows and structured data extraction Templates for GlobalCapture

Because It Covers:

- Creating Capture Workflows
- Creating Workflow Fields
- Creating Structured Templates

CGCE

AGCE

2 After CGCE

Take: Advanced GlobalCapture Engineer (AGCE)

If You Will Be: Designing and building unstructured data extraction Templates for GlobalCapture

Because It Covers: GlobalCapture Advanced Features





Customer IT/Power User Education Roadmap

1 Getting started with GlobalSearch[®]

Take: Square 9 System Architect (SSM)

If You Will Be: Managing and supporting GlobalSearch

Because It Covers:

- User Functions
- Admin Functions

2 After SSM

Take: Certified GlobalAction Engineer (CGAE)

If You Will Be: Analyzing business processes and building process Workflows in GlobalAction

Because It Covers:

- Analyzing Business Processes
- Creating Process Workflows
- Creating Workflow Fields
- Batch Portals
- GlobalAnalytics



3 After SSM

Take: Certified GlobalCapture Engineer video series (CGCE)

If You Will Be: Designing and building Workflows and structured data extraction Templates

Because It Covers:

- Creating Capture Workflows
- Creating Workflow Fields
- Creating Structured Templates

4 After CGCE

Take: Advanced GlobalCapture Engineer (AGCE)

If You Will Be: Designing and building unstructured data extraction Templates for GlobalCapture

Because it covers: GlobalCapture Advanced Features

5 After CGCE

Take: Certified GlobalForms Engineer (CGFE)

If You Will Be: Designing and building electronic forms

Because It Covers: GlobalForms Basics

