

## Course Details

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- 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:** Certified GlobalForms Engineer (CGFE)
- Objective:** Development of the necessary skills required to effectively design and implement basic GlobalForms solutions.
- 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:

- Administration and configuration
- Best practices for form design
- Form submissions
- Using business rules for calculation and advanced validation
- Techniques for creating multiple documents within GlobalSearch from a single for submission
- Workflow design within GlobalForms
- Workflow configuration, email notification, and task list management
- Creating a portal/launch page for forms and applications

## Course Syllabus

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- 1. User Interface Overview**
  - a. Administration Panel
  - b. Task List
  - c. Applications, Forms, Spaces
  - d. Tenant Administration
- 2. Simple Demonstration**
  - a. Basic end to end form from browser to GlobalSearch
- 3. Access Administration**
  - a. Create, Manage, Delete Workflow Nodes
  - b. Workflow Noes, with Exercises
  - c. Creating Tenants
  - d. Creating Users
  - e. Creating Roles
- 4. Creating Forms**
  - a. Control Palette Overview
  - b. Control Properties Overview

- c. Using the Custom Panel
- 5. **Setting Security**
- 6. **Sharing Forms Links**
- 7. **How to Map to GlobalSearch**
- 8. **Templates**
- 9. **Best Practices – GlobalSearch, GlobalForms, Planning**
- 10. **Simple Business Rules**
  - a. Set Properties based on IF
  - b. How to adjust business rules
- 11. **Rule Debugger**
- 12. **Form Actions**
  - a. Email
- 13. **Flows – Form to Form (No Approval)**
- 14. **Localization**
- 15. **Creating Custom Themes**
- 16. **Creating Spaces**