

LiquidOffice Training Agenda

Powerful Web-based business process automation solution for creating, deploying and automatically managing the routing, tracking and approval processes for HTML and PDF electronic forms.

This course explains the different types of forms that can be designed and provides a practical approach in learning the form and field attributes. LiquidOffice is simply the fastest way for organizations to put all their corporate forms online to automate the mission and business critical processes they drive.

Audience

Staff having daily responsibility for processing and capturing data from LiquidOffice electronic documents. Professionals who will be involved in the planning, installation, administration, or ongoing use of solutions utilizing the Autonomy Process Automation system will benefit.

Prerequisites

Please feel free to contact us if you have questions about the suitability of this class to your particular situation. One of our trainers will be glad to help. To ensure students get the most value from this course, those attending should meet the following prerequisites:

- Understanding the Windows environment
- Workings knowledge of Client / Server applications
- JavaScript scripting will be required to get the most out of the optional scripting training.

Objectives

By participating in this course, you will understand:

- Design functional single or multiple page electronic forms to include field type selection, Expression Builder, electronic signatures, database lookups, validations, default values etc.
- Become proficient in managing the forms environment within Management Console, including folders, work queues, users,

opentext
LiquidOffice

BOOT CAMP

- **Audience:** Staff having daily responsibility for processing and capturing data from documents, including: System Operators, Forms Designers, Database Administrators, System Administrators
- **Prerequisites:** Understanding of databases, basic familiarity with Microsoft SQL and Access.
- Students will learn to manage all major components of the LiquidOffice.
- Hands-on practical labs and training manual provided for boot camp students
- Certificate provided for each successful student successfully com-



- roles, connect agents, routing & licensing etc.
- Develop a thorough understanding of the LiquidOffice Portal for eforms processing as logged in users kick off and control forms throughout the processing lifecycle
- Demonstrate and implement the form and process design capabilities
- Applying validations and setting up exports
- Describe and understand the LiquidOffice system architecture
- Install and configure a LiquidOffice system
- Analyze and redesign existing processes using LiquidOffice forms & processes
- Successfully export data.
- Integrate LiquidOffice with TeleForm

Outline

- End-to-End: Understanding the LiquidOffice architecture, components and process
- Connect Agents, Exports and routing
- Functional Forms: In depth eforms design covering all Designer objects
- Processing Forms: Anonymous Public Access and LiquidOffice Desktop - where Users require login access
- Optional Process Studio: Building LiquidOffice Processes to control the document workflow.
- Lecture style with hands-on labs

Location

Distance Training via Remote Access via GoToMeeting service provided by Connectis, Client site limited to software licenses purchased or Connectis location (PC's provided) in Concord. Inform your instructor as to your preference.

Enrollment & Fees

- **Boot Camp Enrollment** is limited to 6 students to ensure quality attention is provided to each student and will receive a certificate upon successful completion of the course content and passing the tests
- \$3,300 + HST / single student, includes daily lunch
- \$3,000 + HST / student (min. 4 persons)

- Payment options contact Jazz at 905.695.2200 press '1' or jazz@connectis.ca
- **Ala Carte training** is available in 2 hour increments @ \$225/hr.
- Reserve your seat by contacting Connectis at 905.695.2200 or register online at <https://www.connectis.ca/event/liquidoffice-bootcamp-training/> or email us at info@connectis.ca

There are **no prerequisites**. The pace of the course is geared towards End User staff, only 3 hours are geared toward administrative staff responsible for maintaining the system.

Agenda

DESCRIPTION

In this program you'll learn how to design and process electronics forms, set up data exports and integrate with TeleForm document capture solution. The range of topics is facilitated by qualified instructors who are experienced in LiquidOffice. Training manuals are not provided, unless classroom Boot Camp Training is purchased for each student.

DIVISIONS

- Intro to LiquidOffice
- Accessing the LiquidOffice Server
- Accessing & Filling Out Forms
- Using Process
- Forms Designer Overview
- Working with Fields Part 1
- Working with Fields Part 2
- Formatting Controls
- Publishing & Exports
- Process Studio Overview
- Working with Tasks
- Publishing a Process
- Management Console Overview

END TO END PROCESSING

Watch as a complex Internal Job Application eform with workflow is processed, so students can appreciate the power of LiquidOffice.

END USER

The following focuses on the users of the system, form

designers and process implementers.

- The Web Portal (Desktop)
- User Profiles
- Ad Hoc Routing
- Working with Attachments
- Searching for Forms or Work Flows
- Working with Work Queues
- Difference between Ad Hoc and Workflow items
- Using LiquidOffice through Outlook

FORMS DESIGN

- Understanding LiquidOffice Form Designer
- Form Designer Installation
- Planning your form
- The Form Designer Gallery
- Adding Objects to a form
- Object and Field properties
- Design Aids, Format and Alignment tools
- Expression Builder
- Data Validations
- Database Lookups
- Publishing a Form
- Form Exports
- Form Packets
- Optional integration with TeleForm

ADMINISTRATOR

The following focuses on planning, installing and administering the LiquidOffice solution.

- Server Prerequisites
- Planning / Sizing your Servers
- Server Cluster Architecture
- Installing Process & Presentation Servers
- Installing the Outlook Plug-in
- LiquidOffice Management Console
- Users, Groups and Roles

- Folders /Work queues
- Reassigning Forms & Tasks
- Creating Connect Agents
- Server Options
- System Reports
- Business Activity Monitor

PROCESS STUDIO DESIGN (Optional)

- Introduction to Process Studio Workflows
- Types of Processes
- LiquidOffice Process Automation Architecture
- Process Designer
- Workflow Analysis and Preparation
- Using LiquidOffice Process Automation
- Load Simulation

SCRIPTING (Optional)

Users must be fluent in programming in JavaScript. Range of topics include:

- Client Side Scripting
- Server Side Scripting
- Introduction to the Process API

To learn more about Connectis, visit: www.Connectis.ca

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