

ELO Administration Training

DAY 1:

1. ELO basics
 - Server Architecture & Components
 - Server Modules overview
 - Client modules overview
2. ELO Windows client basic Overview
 - User Interface
 - Options
 - Terminologies
3. Document Management functions
 - Add / Check-in or Check-out / Delete document
 - Adding / updating metadata
 - Sharing document thru' mailbox / email / link
 - References and links
 - Version control
 - Duplicate handling
 - Search document using metadata
 - Image management functions
 - Various views in ELO
 - Comparing documents and versions
 - Split / Merge pages
 - Convert document to PDF & TIFF formats
 - Send documents from mailbox
4. Search functions
 - Search by Keyword Forms
 - Search by Notes
 - Search by Version Comments
 - Full-text search
 - Other Search options
5. Keyword Forms
 - Keyword form creation thru' wizard / manual creation
 - Field configurations
 - Field Types
 - Keyword Lists
 - Access control

- Import / export keyword lists
 - Key Word Form configurations
 - KWF Name & KWF Properties
 - Filing Path, Colour, Document Status
 - Workflow, Encryption Key, Lifetime
 - File documents using Filing Clause
 - Document Right
 - Keyword Form Access Rights
 - Tab Headers
 - Copy Keyword forms
6. Users & Group Management
- Users
 - Create
 - Access Rights
 - Groups
 - Create
 - Access Rights
 - User – Group Mapping
 - Set up Access Rights for Folder Structure
 - Substitution Management

DAY 2:

7. Other
 - Filing Path administration
 - Export / Import
 - ELO Viewer
 - Delete / Restore
 - Reports
 - Script Manager

8. Options (System Settings)
 - General
 - Display
 - Viewing Filters
 - Notes
 - Mail / Signature
 - Paths
 - Mailbox
 - Scanning
 - Searching
 - Task Reminder
 - Load options

9. Workflows
 - Workflow creation
 - Understand workflow components
 - Update keyword form fields in a workflow
 - Attaching workflows to keyword forms
 - Adhoc workflows

10. Understanding the System Components
 - Tomcat Services
 - ELO Application Components
 - Internet Gateway
 - Creating additional archive

11. Admin Console
 - Windows Client Configurations
 - Windows Client Options
 - User / Group Management
 - Keyword Form Management

12. Troubleshooting / Support

- Review logs
- Restart services
- Raise Support tickets