

1 Short description of the training

The Doma application functional administrator gives a functional overview of DocRoom and Routing application.

2 Prerequisites of this training

- A portable PC with VMware WorkStation 14 player is required to run the provided VM with a demo Doma installed. (Mind! The PC must have enough memory and processor power to be able to run the VM.)

3 Main target of this training

The main target of this training is to give trainees an overview of:

- The possibilities of DocRoom (DSM system)
- The possibilities of Routing (Workflow system)
- How to configure DocRoom and Routing without programming

4 Training content

4.1 Day 1 – General introduction & DocRoom

- Introduction: Arco Doma functionalities (powerpoint presentation)
 - The Doma Webinterface: document management and workflow
 - The main parts of the Doma web interface: DocRoom, Routing, ...
- The DocRoom WebInterface: presentation and main functions
 - Tree structure
 - Result screens
 - Search possibilities
 - Add/edit/delete documents, version management, ...
- The DocRoom Explorer & Office Add-Ins
- DocRoom admin - WebInterface
 - User management
 - Security
 - Action profiles
 - Security on folder level
 - Security on document level
 - Other security items
 - Overview of monitoring and setting overview in the Doma WebInterface
 - extensions
 - Batch jobs overview
 - File servers overview
- DocRoom admin – configuration
 - Basic configuration of document categories
 - Configuration of properties
 - Pool properties
 - Document category properties

- Property types
- Basic configuration of edit checks

- Basic configuration of folder categories

- Basic configuration of dossier categories
- Configuration of packages

- Configuration of screens
 - Search screen
 - Result screen
 - Link screens to categories

4.2 Day 2 - Routing

- General introduction of Routing – PPT & training environment
 - Routing terminology – PPT
 - Routing basics – explanation in web interface

- Demo procedure Holiday Request – VM Trainer
 - Show procedure in admin module
 - Start procedure as trainer
 - Approval by admin
 - Feedback to trainer

- Create procedure
 - Basics – procedure vs. Case category
 - Finetune procedure, several exercises in procedure configuration
 - Creation of a case category

- Routing security – PPT & demo on the system

- Routing procedure design & step types
 - Sequential flow
 - Parallel flow
 - Conditional flow
 - Delegation
 - Subprocedure

- Routing and documents
 - Create a workflow as an insert procedure of a document
 - Differences document with insert procedure – workflow category

- Routing procedure to add/edit/delete/check-out a document

- Deadlines/ Delegations/Scripting in Routing

- Notifications

4.3 Day 3

- DRUM upload
 - File upload
 - Basic XML upload configuration
 - Database upload
- Document templates
 - Configuration of a Word template
 - Identification of Word template in Doma
 - Use of the template for automatic document creation
 - Web version of this tool
- Internal messaging
- Import/export
- Certain object/workflow/user events not treated in the previous days
- Site configuration
 - General structure of the site
 - Most important XML pages
 - Specific XML files: filters, groupers, toolbar

Not included in these 3 days :

- DRUM other than mentioned above
- Certain managed lists (Thesaurus, concept tree)
- Event handlers

For other trainings :

- Installation
- Webservice, API