

ImageSite Training Class Syllabus

Note: Each ImageSite Training Class is tailored to the individual needs of the participants, and includes all necessary Plot Station training. For a particular audience, some topics may be covered in close detail while others may be summarized or skipped. This syllabus lists all of the topics that may be included in the three-day class.

► Part 1 –Technical Training

Module 1.1 – ImageSite Components and Environment

- ImageSite Components
- Hardware and Software Requirements
- Review Questions

Module 1.2 – Installing and Configuring ImageSite

- Implementation Overview
- Installing Plot Station for ImageSite Server-Side Printing
- Setting Up the ImageSite Database Environment
- Setting Up the Web Server Environment
- Installing and Configuring the Web Server Components Before Installing ImageSite
- Installing ImageSite
- Launching ImageSite
- Configuring ImageSite
- Review Questions

Module 1.3 – Site Administration

- About Site Administration
- Setting the System Defaults
- Adding and Removing Projects
- Administering Users at the Site Level
- Setting Up Windows Authentication
- Working With Remote ImageSite Sites
- Review Questions

Module 1.4 – Setting Up Printing

- About Plot Station and Print Destinations
- Setting Up ImageSite to Print to Plot Station
- Setting Up Stamping for a Project
- Review Questions

Module 1.5 – Project Administration: Controlling Access for Users and Groups

- About Project Administration
- Adding Users to a Project
- Adding Groups to a Project
- Assigning User and Group Access Privileges
- Adding and Assigning UI Profiles
- Review Questions

Module 1.6 – Project Administration: Controlling Project Settings

- Setting the Project Type and Project Settings
- Adding Library Areas
- Adding Custom Fields for Documents
- Controlling Events Logging for a Project
- Controlling Versions and Document Display Names
- Restoring and Purging Deleted Data
- Review Questions

Module 1.7 –Bulk Upload Tool

- About Bulk Upload
- Preparing to Use Bulk Upload
- Validating a Bulk Upload File
- Uploading at the Project Level (Site Administrators Only)
- Uploading to a Project Folder
- Review Questions

Module 1.8 – External Sources

- About External Sources
- Creating a Bulk Acquire Document Source
- Creating an External Document Source
- Using Field Value Composition Rules for External Document Sources
- Adding Sources for External Resource Files for External Document Sources
- Viewing Documents Acquired from a Document Source
- Viewing Acquisition Processor Statistics
- Review Questions

Module 1.9 – Document Workflow Setup

- About Document Workflow Setup
- Creating a Document Workflow
- Review Questions

Module 1.10 – Issues Setup

- About Issues Setup
- Adding Schedules
- Creating Issue Workflows
- Adding Issue Categories
- Downloading Issues Text Files
- Review Questions

Module 1.11 – Usage Reports

- About ImageSite Usage Reports
- Printing or Exporting Project Usage Reports
- Printing or Exporting User Information Reports
- Review Questions

► Part 2 – ImageSite End-User Training

Module 2.1 - Introduction to ImageSite®

- What Is ImageSite?
- Supported File Types
- ImageSite Components
- Review Questions

Module 2.2 – Using Find Mode

- Accessing ImageSite Find Mode
- Finding Documents
- Working with Find Results
- Moving Around in the Document Viewer
- Adding Documents to the Out Basket
- Printing Documents
- Encapsulating Documents
- Review Questions

Module 2.3 – Working Offline with Encapsulations

- About Encapsulations
- Opening an Encapsulation
- Viewing Encapsulated Files
- Viewing Encapsulated Markups
- Working With Field Markups
- Phoning Home to ImageSite
- Review Questions

Module 2.4 – Using Explore Mode

- Accessing ImageSite Explore Mode
- Opening a Project
- Working with Folders
- Uploading Document Files
- Opening and Viewing Documents
- Using a Folder or Document URL
- Working with Document Versions
- Using the Advanced Search Page
- Review Questions

Module 2.5 – Using Explore Mode in a Workspace Project

- Opening a Workspace Project
- Uploading Documents
- Checking Out and Checking In a Document
- Managing Links to Document References
- Review Questions

Module 2.6 – Adding Markups and Notes

- Adding a Markup
- Drawing in a Markup and Adding Text
- Using the Measuring Tools
- Working with Multiple Markups
- Adding Notes
- Review Questions

Module 2.7 – Holding a Conference

- About ImageSite Conferences
- Arranging a Conference
- Participating in a Conference
- Viewing a Conference Transcript
- Review Questions

Module 2.8 – Working with the Out Basket and Project Libraries in Explore Mode

- Adding Folders and Documents to the Out Basket
- Creating Sets and Print Sets
- Printing from ImageSite
- Checking Out and Downloading the Out Basket Contents
- Building and Downloading Encapsulations
- Review Questions

Module 2.9 – Reading and Adding Project News

- Using Project News
- Adding News Threads and News Items
- E-mailing the Author of a News Item
- Review Questions

Module 2.10 – Using Events, Monitors and Notifications

- About Events, Monitors, and Notifications
- Browsing Events
- Printing and Exporting Events Lists
- Working With Monitors
- Viewing Notifications
- Review Questions

Module 2.11 – Using Document Workflow, Rapid Indexing, and Digital Signature

- About Workflow and Rapid Indexing
- Reviewing Documents in Markup Mode
- Reviewing Documents in Indexing Mode
- Viewing the Workflow Log
- About ImageSite Digital Signature
- Setting a Digital Signing Password
- Signing Documents or Components
- Review Questions

Module 2.12 – Working with Issues

- About Project Issues
- Viewing Issue Components in a Project
- Adding Issues
- Viewing and Responding to Issues
- Producing Issue Reports
- Review Questions

Module 2.13 – Using ImageSite on the Pocket PC

- About PocketDocs
- Logging In and Opening a Project
- Searching for Documents
- Using the Tree View
- Viewing Documents
- Working With Markups
- Printing Documents at the Server
- Review Questions

