# Training Plan for iPortalDoc Administrators

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| **General Objective** | | It is expected that the trainees acquire skills to configure all aspects of iPortalDoc and become capable of creating and managing a company's functional structure. |
| **Course Load** | 40 Hours | **Supporting documentation** — Administration Manual – 40H; iPortalDoc Manual; Procedure for the creation of workflows; Procedure for the creation of macros; Procedure for the creation of templates. |

| Module | Hours | Subject | Summary | Objectives of the module |
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| 1 | 1 | **Document Management** | - Theoretical presentation on document and workflow management<br><br>- Presentation of iPortalDoc | 1. Basic concepts of document management;<br>2. Functionalities and advantages of a DWMS;<br>3. Presentation of iPortaldoc;<br>4. Work areas on the web interface of iPortalDoc. |
| 2 | 1 | **Users configurations** | - Process of configuration of users and groups | 1. Creation of users and groups on IPBrick;<br>2. Importance of groups in the document management. |
| 3 | 2 | **Basic configurations on iPortalDoc** | - Users Profiles (*Settings Menu*)<br><br>- Document hierarchy (*Folder Menu*) | 1. Association of the users created on IPBrick to iPortalDoc;<br>2. Creation of Profiles and its assignment to users;<br>3. Folders Management (create, change, move, remove). |
| 4 | 2 | **Entities Management** | - Introduction to Contacts (*Apps Menu*) | 1. Management of profiles and users;<br>2. Creation of auxiliary data (namely, entity types);<br>3. Creation of entities, contacts and locations;<br>4. Entities search. |
| 5 | 4 | **Basic configurations for the insertion of documents in iPortalDoc** | - Configurations for the classification/insertion of documents (*Settings Menu*) | 1. Creation of document types;<br>2. Creation of auxiliary fields;<br>3. Creation of macros;<br>4. Association of document types, workflows and macros to folders. |
| 6 | 5 | **Actions on documents** | - Insertion of a new document<br><br>- Analysis of the document<br><br>- Search of documents<br><br>- Analysis of the Actions list | 1. Insert document (upload, drag&drop, by template and others);<br>2. Download documents;<br>3. Forward documents;<br>4. Add comments;<br>5. Remove documents;<br>6. Check in / Check out;<br>7. Update revision of a document;<br>8. Edit information of a document;<br>9. Associate documents (with and without search);<br>10. Dissociate documents (with and without search);<br>11. Link documents (with and without search);<br>12. Tag documents;<br>13. Move documents;<br>14. Change permissions on documents;<br>15. Cancel Workflow;<br>16. Register (document for Quality);<br>17. Sign with Citizen Card;<br>18. Pending actions;<br>19. History;<br>20. Analysis of the +info;<br>21. Searches;<br>22. Shortcuts. |
| 7 | 1 | **Files System** | - Interaction of the files system with the web interface of iPortalDoc | 1. Configuration of the Access and Insertion shared folders; |
| 8 | 16 | **Workflows** | - Analysis of the *Worflow Menu* | 1. Create workflow;<br>2. Instantiate workflow;<br>3. Configure workflow;<br>4. Associate document type to workflow;<br>5. Associate folder to workflow;<br>6. Insert actions in a workflow;<br>7. View/change transition functions;<br>8. Change the execution time of actions of a workflow;<br>9. Actions generator;<br>10. Creation of Macros (Attachments and Actions options);<br>11. Execution of actions;<br>12. Interpretation of the graphic elements of a workflow;<br>13. Scheduling of workflows;<br>14. Advanced search by executed states and active states of the workflows;<br>15. Statistics;<br>16. Petri nets. |
| 9 | 4 | **Templates** | - Analysis of PDF templates (*Settings Menu*)<br><br>- Analysis of Office templates (*Settings Menu*) | 1. Create fields of PDF template (form);<br>2. Generation of template;<br>3. Export/Import of a template;<br>4. Download/Update XSL file (final PDF formatting);<br>5. Creation and association of Office templates. |
| 10 | 4 | **Other Configurations** | - Analysis of the Configurations of the User<br><br>- Analysis of the *Apps Menu*<br><br>- Analysis of the Configuration Interface (*Settings Menu*) | 1. Activation of modules: DBDOCMAILS, predefined keywords, insertion of hierarchy;<br>2. Statistics, Calendar;<br>3. iPortalDoc Language, Actions to perform, Fields in the action list, Chronological Scheme, Document type, Shortcuts, Tags, Customize folders, Associated Documents, Mail Archiving, Order Documents, +info Management, Predefined comments, Search Options, Change Password, Change Acronym, Absences. |