



# CUSTOMER EDUCATION CLASSES

## ADVANCED ADMINISTRATION TRAINING CURRICULUM

### DAY ONE - OVERVIEW OF THE MAXRECALL MODULES

#### **Document Retrieval**

- What processes are involved in retrieving a file (services, etc.)
- Advanced Query writing
- Print Layouts
- Web Viewer

#### **Document Capture**

- How to Capture and Manage different File Types
- Overview of Document Capture using text parsers
  - Different ways to capture text streams
- How text parsers work (Not a How To Build A Text Parser Class)
  - KeyWord captures
  - SubDoc Linking and Requirements
- Processes that occur when scanning/importing a document
  - Interface with TWAIN driver
- Remote Scanners
- Page Separator
- Complete Image Filter Training
  - Bar Codes/OCR

#### **Administration**

- Complete Document Set up Training
- Complete Security Set up Training
- Document Storage & Organization
  - Definition, Set-Up and Maintenance

### DAY TWO – INTERNAL WORKINGS OF MAXRECALL

#### **Programs & Processes**

- What machines they will run on and when
- TPO Services

#### **ODBC Drivers**

- How and why we use them
- Licensing and Versions
- MaxRecall to ERP Database Mapping
- Pulling Keyword Data from additional databases

#### **Terminal Services and Citrix**

- Installation and Maintenance
- Advantages/Risks/Issues

#### **Advanced SQL/MaxRecall Relationships**

#### **MaxRecall Configuration Files**

- Where to find them
- When each is used
- Content and Modification



## CUSTOMER EDUCATION CLASSES ADVANCED ADMINISTRATION TRAINING CURRICULUM

### **E-mail/Fax**

- Accessing Outlook
  - SMTP vs. Exchange
  - Outlook Configuration and Limitations
  - MaxRecall address book
- Accessing Lotus Notes
- Auto-E-mail Options
- Auto-Fax Options
- Inbound/Outbound Fax and E-mail

### **DAY THREE – ADDITIONAL FUNCTIONALITY & REPORTING**

#### **Moving Binders & Filers**

#### **Database Backups**

#### **Import and Export of MaxRecall Docs**

#### Misc Processes

- FTP Options
- Host KeyWord Imports
- Host Viewer Setup and Maintenance

#### **Log Files**

- Breakdown of support Logs
- Logging within MaxRecall

#### **Reports**

- Management and Scheduled Reports

#### **FAQ/Errors (What and How to fix)**

#### **New Uses/Upcoming Enhancements**

- Lockbox
- Revision Control
- ERP Automation
- Expanded HR functionality
- MaxRecall Workflow Options
  - KeyWord Tracking
- Importing Inbound e-mails

#### **MaxRecall Portal Instructions**

#### TRAINING CONTACT:

ADAM DAHLHEIM  
(678) 805-1132  
ADAM@MAXRECALL.COM



## CUSTOMER EDUCATION CLASSES ADVANCED ADMINISTRATION TRAINING CURRICULUM

### **Class Policy, Payment Policy, Cancellation Policy and Hotel/Transportation Information**

#### **Class Policy**

- Classes will be held provided the minimum confirmed attendees are met
- You will receive an e-mail confirmation after MaxRecall Technologies has received payment for the class
- When making flight reservations, please fly into Hartsfield-Jackson International Airport (ATL)
- Bring your laptop with network capability if you require internet access. Wireless internet access will be limited to breaks and lunch

#### **Hotel/Transportation**

A list of hotel and transportation options will be provided in the e-mail confirmation.

#### **Payment Policy**

Payment for training at MaxRecall Technologies, Inc. must be made in advance. No credit will be extended for training invoices.

PLEASE NOTE:

YOU ARE NOT OFFICIALLY CONFIRMED UNTIL PAYMENT HAS BEEN RECEIVED.

#### **Cancellation Policy**

Cancellations with full refunds will be allowed up to 14 days prior to the start date of the course. Cancellations must be submitted in writing via fax at (770) 998-8245 or e-mail to: [training@maxrecall.com](mailto:training@maxrecall.com). Any cancellation occurring within 14 days of the start date will receive a refund less a 25% non-refundable late cancellation charge regardless of when the registration was made. Registrants who do not attend a course and fail to notify MaxRecall Technologies, Inc. will forfeit the entire registration fee. You may transfer your class registration to a different class provided you are paid in full and you notify MaxRecall Technologies, Inc. within 14 days prior to the start date of the course. Transfers may be submitted in writing via fax at (770) 998-8245 or e-mail at [training@maxrecall.com](mailto:training@maxrecall.com).

In the event that a class is cancelled at the discretion of MaxRecall Technologies, Inc., MaxRecall Technologies, Inc. will only be liable for tuition fees incurred due to the cancelled class. Please do not make travel arrangements until you have received confirmation of the class date and payment received.