

**Corso di formazione in gestione documentale
Knowledge fundamentals****Date:** 13 e 14 dicembre 2006

dalle ore 8:30 alle ore 17:30

Organizzazione:

Tinext SA
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Prezzo: CHF 1'500.00 + IVA
(previsti sconti per più partecipanti della stessa azienda)**Sede:** Lugano – Università della Svizzera Italiana**Relatore:** Formatore specialista del prodotto Livelink di
Open Text**Lingua:** italiano

Organizzazione delle giornate	8:30 – Inizio della sessione della mattina 10:30 – Coffee Break 12:30 – Pranzo (offerto da Tinext) 13:30 – Inizio della sessione del pomeriggio 15:00 – Coffee Break 17:30 – Fine lezione
Contenuti del corso (in inglese)	Nelle pagine successive sono indicati i dettagli degli argomenti che saranno trattati durante il corso

Knowledge fundamentals

Introduction

Knowledge Fundamentals is a today course that provides the core information you need to manage your organization's intellectual capital using Livelink. The Knowledge Fundamentals course provides a through understanding of core Livelink functionality.

By the end of this course you will understand how to navigate through one of the most successful document management systems and use its various tools.

Workshop Overview

Section 1: Get Your Bearings

Objectives:

- How people Use Livelink
- How will Your Organization Use Livelink
- Accessing Livelink and Logging In
- A Livelink System's "Home" Page
- Navigating in Livelink
- Recognizing the Common Interface Elements
- Introducing the Three Livelink Workspaces
- Identifying the Types of Livelink Items
- Understanding How the Functions Menu is Organized
- Where's the User Manual?
- Loggin Out

Section 2: Share Knowledge

Objectives:

- Accessing Documents
- Adding Information to Livelink
- Add Folders
- Folder and Document Naming Conventions
- Add Documents
- Create a New Document Online
- Compose Text Documents
- Include Attributes as You Add Items
- The Metadata for Livelink Items
- Item Names and Nicknames

Section 3: Managing Documents

Objectives:

- Document Management Basics
- Reserve Documents
- Editing Documents Offline and Online
- Unreserve Documents
- Accessing Document Versions
- Managing Versions
- Limiting Versions for a Document
- Cleaning Up Versions
- Track important Versions with Generations
- Copy Move and Delete Items

Section 4: Collaboration Tools for Business Users

Objectives:

- Rating Documents
- Creating Pointers – Shortcuts, Short Links & URLs

- Participate in Discussions
- Spread the News
- Working in Projects

Section 5: Processing Work with Livelink

Objectives:

- Finding Tasks Assigned to You
- Add Tasks
- Processing Tasks from a Task List
- Processing Tasks from a Workflow
- The Attachments Page
- Going Away? Set a proxy for Your Workflow Assignments

Section 6: Personalize Your User Environment

Objectives:

- Manage Your Personal Workspace
- Your Perspective on Knowledge
- Mark Items as Your Favorites
- Configure Tabs in Your Personal Pages
- Recommendations & Collections
- Ask for Notification
- Your Notification Settings & Interests
- Get Notification on Specific Interests
- Configure Your Livelink Environment

Section 7: Find Information Fast

Objectives:

- Finding Information Using the Search Bar
- Use Search Bar Options to Search More Effectively
- Use the Search Result Page
- Interpreting Your Search Results
- Perform Advanced Searches
- Use the Full Text Options
- Search Using the System Attributes
- Use the Natural Language Query
- Creating a Template from Search
- Saving Search Queries
- Prospecting for Information

Section 8: Make Information Easier to Find With Metadata

Objectives:

- Livelink Categories and Attributes
- Search on Custom Categories
- Creating Categories
- Use a Variety of Attributes
- Designing Custom Attributes
- Create Attribute Sets Within a Category
- Prompting Users for Category Values
- Modifying a Category After it is In Use
- Category Design Considerations

Section 9: Working with Compound

Objectives:

- Knowing What To Use Compound Documents
- Making a Compound Document
- Organizing Elements within a Compound Document

- Creating Revisions and Releases
- Viewing the Outline of a Compound Document

Section 10: Set Up Your Team Environment

Objectives:

- The Project Perspective on Knowledge
- The Project Creation Wizard
- The Project Roles-Coordinator, Member, and Guest
- Special Project Tools
- Configuring the Overview Page
- Project Navigation Options
- Configuring the News Page for a Project
- Configuring Project-Related Reports
- Viewing the Project's Contents at a Glance
- Using Folders Versus Projects

Section 11: Manage Your Collaboration Tools

Objectives:

- Share Opinions with Discussions
- Tips to Manage Your Discussion
- Create a Channel
- Channel Maintenance
- Creating a New Task List
- Create Milestones
- Create a New Task Group
- Create a New Task
- Viewing Summary Pages
- Edit Your Task List
- Create a Poll
- Take a Poll and View the Poll Results
- Tips to Manage Your Polls

Section 12: Initiate and Manage Work Processes

Objectives:

- Use Workflows to Enhance Business Processes
- Understanding Workflow
- Reading the Workflow Instance Map
- Reassigning Workflow Tasks
- Controlling Workflow Execution

Section 13: Build Your Livelink Community

Objectives:

- Community Development
- Configuring Livelink Users and Groups
- Who is the Admin User?
- What is the DefaultGroup
- Creating Livelink Groups
- Set a Group Leader
- Preparing to Create Livelink Users
- Add and Edit Livelink Users
- Editing and Deleting Groups
- Delete Livelink Users
- Options for System Administrators

Section 14: Access Control Basics

Objectives:

- Purpose of Access Control
- Permissions Page Basics
- Work Items Permissions
- Document Management Item Permissions
- The Principal ACL Entries
- How Permissions Are Applied to Livelink Items
- Chsnge or Remove The Default Access

Section 15: Initiate and Manage Work Processes

Objectives:

- Apply One ACL Change to Descendants
- Apply Several Changes to Sub-Items
- Override Project Permissions
- How Livelink Maps Permissions From Folders to Projects
- How Livelink Maps Permissions From Folders to Work Items
- How Permissions Change When Coping and Moving Livelink Items
- Permissions Setting Reminders
- Best Practices for Configuring Access Control

Section 16: Design Your Community Environment

Objectives:

- Structuring Your Enterprise Workspace
- Key Workspace Design Considerations
- Customer Enterprise Workspaces
- Three Tools to Customize Xour Workspace Appearance
- Use Featured Items
- Modify the Folder Presentation
- Create Custom Views
- Managing a Folder's Contents

Section 17: Next Steps: Decisions and Directions

Objectives:

- What Lies Beyond the Scope of this Course?
- Train Your Users
- General Training Pointers
- Tested Training Strategies
- What Lies Beyond “Core” Livelink?
- Communicate with Your Administrators and with OpenText
- Livelink Help Desk Facts