

Technical Certification Program For INVOICES

and

Add-on Components for the North American Capture Kit

SUMMARY:

The purpose of this document is to detail the topics that will be presented during the technical training certification course. This will include curriculum, topics for discussion, and hands-on exercises. A written and practical test will be given during training to ensure validity of skill set has been reached and the individual can implement the ReadSoft INVOICES product.

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Created: July 10, 2010
Modified: November 22, 2011
Distribution: External
Status: Final
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I About this training course

I.1 Training overview

This course is designed to provide comprehensive technical knowledge of ReadSoft INVOICES. The curriculum and materials provided covers both basic and advanced topics necessary to become technically proficient in the implementation operation and support of the software.

I.1 Course duration, location and class times

- Four full days of instructor lead hands on training in a classroom environment; two days for INVOICES and two days for the North American Capture Kit components
- Classes begin each day at 8:15AM CST through 4:45 PM.
- Each attendee is responsible for their meals and booking transportation and lodging:

Classroom Location: ReadSoft North America
 3838 N Causeway Blvd, Suite 2400
 Metairie, LA 70002
 Phone 504-841-0100

Hotel Accommodations: New Orleans Marriot Metairie at Lakeway
 3838 N. Causeway Boulevard
 Metairie, LA 70002
 Phone: 1-504-836-5253

<http://www.marriott.com/hotels/travel/msymm-new-orleans-marriott-metairie-at-lakeway/>

The ReadSoft office is located approximately 10 miles from Armstrong International Airport (MSY).
Taxi cab rates are \$25 to \$30 one way.

I.2 Pre-requisites

I.2.1 Laptop requirements for each training attendee

All training participants are required to bring their own laptop to class that meet or exceed these requirements

- Windows XP, Windows Vista (32 or 64), Windows 7 (32 or 64)
- Dual Core 2.2 GHz processor
- 2 GB RAM (1.28GB Free)
- 12 GB free disk space on local HDD
- 1 available USB ports for distribution of training materials
- Complete local administrative rights to the laptop

I.2.2 Attendee experience

Training attendees must have experience working within and configuring a Windows computer environment:

- Windows XP, Vista, 7 desktop operating and file systems
- Windows Server 2003, or 2008
- SQL Server 2005, 2008
- Windows Active Directory security
- Database rights and security
- File naming conventions
- Windows networking knowledge

I.2.3 Software and licensing

ReadSoft will provide a Windows XP virtual machine for VMware Player 3.x to run on each attendee's laptop PC

I.3 Expectations

Upon completion and successful passing of the written certification exams, the attendees will be an extended arm of the ReadSoft family. They will be given access to product technical documentation and tools. Trained technical personnel are expected to be able to plan, install and support an INVOICES capture solution based on the both the customers requirements and the capabilities of the INVOICES software.

2 Outline Days 1 and 2

2.1 ReadSoft Company Overview

2.2 About ReadSoft DOCUMENTS for INVOICES

2.2.1 Product Introduction and Overview

2.3 Installation Exercise

2.3.1 Basic System Platform Requirements and Installation Guide

2.3.2 Database configuration

2.3.3 Installation

2.3.4 Licensing

2.3.5 Review of certified scanners

2.4 Invoice Profile Overview

2.4.1 Profile overview

2.4.2 Profile Types

2.4.3 Field Types

2.4.4 Field Properties

2.4.5 Job Settings

2.4.6 Transaction Descriptions

2.4.7 Export / Import Configurations

2.5 Advanced Profile Configuration

- 2.5.1 Exercise 1 – Creating new profiles
 - The role of Eiglobalextra.ini and the country profiles directory
 - Field Properties and what they mean

- 2.5.2 Exercise 2 – Modifying the profile by adding and removing fields
 - Adjusting the field options and what they do
 - Paragraph Options
 - Title Occurrence Sets Value use
 - PO Number and other format specifications
 - Debit Credit detection
 - Date handling
 - Amount handling – EIGLOBAL.ini
 - Currency Handling
 - Supplier field property
 - Translation Tables
 - Output methods

- 2.5.3 Exercise 3
 - Transaction Descriptions

- 2.5.4 Exercise 4
 - Job settings
 - Import and export configurations

- 2.5.5 Exercise 5
 - Testing the profile

2.6 INVOICES Module Operation

- 2.6.1 Scan
- 2.6.2 Interpret
- 2.6.3 Verify
- 2.6.4 Transfer
- 2.6.5 Optimize
- 2.6.6 Exercise 6 – End-to-End production run

2.7 Advanced Invoice Processing

- 2.7.1 System Architecture review
- 2.7.2 Process Flow
- 2.7.3 Services
- 2.7.4 The Verify Inbox
- 2.7.5 Operating your demo
- 2.7.6 Optimization

2.8 INVOICES System and Application Configuration

- 2.8.1 More on the Manager Module
- 2.8.2 User Management and Security
- 2.8.3 Workload distribution
- 2.8.4 Other Inbox Settings

2.9 Managing and Monitoring Production

- 2.9.1 Production History
- 2.9.2 Invoice Definitions
- 2.9.3 System Maintenance Plans

2.10 Solution Assessment and Best Practices

- 2.10.1 Analysis
- 2.10.2 Expectations
- 2.10.3 Best Practices

3 Outline Days 3 and 4

3.1 The ReadSoft US North American Capture Kit

- 3.1.1 Introduction and Overview
- 3.1.2 ScanHelper
- 3.1.3 RCE
- 3.1.4 VendorSearch
- 3.1.5 SQL Validator
- 3.1.6 RPM
- 3.1.7 Document Import Manager
- 3.1.8 Importer