



# SpringCM Essentials

PS -100

## Course Description:

This course covers in detail, an introduction to the SpringCM platform, how to configure SpringCM, administrate and manage content delivered through classroom instruction and discussion.

## Course Objectives:

Upon completion of the SpringCM Essentials course, attendees will be able to:

- Gain familiarity with the administration essentials for new admins
- Describe the business-driven nature of SpringCM's platform and architecture

## Audience:

- Administrators
- Business Analysts
- Developers
- SpringCM Implementation Partners
- Business Users, Sales Operations, and IT Managers

## Prerequisites:

- Basic document and folder management skills
- Recommended to have general knowledge of:
  - system operations and administration

## Duration:

2 Days

## Course Topics:

Module 1: User Interface

- Explore the page layouts and navigation capabilities of SpringCM's platform
- Explore folder and document best practices
- Understand SpringCM administrator display options



## Module 2: Preferences

- Overview of the individual and global (account) preferences

## Module 3: Adding Content

- Utilize the methods of uploading documents into SpringCM's platform
- Understand limitations and best practices for uploading documents

## Module 4: Editing Content

- Explore the different methods for editing documents
  - Check-in and check-out process
  - Office 365
  - SpringCM Edit
- Understand how document versioning works

## Module 5: Sharing Content

- Examine the SpringCM internal and external content sharing capabilities
  - Folder
  - Document
  - External Review
  - Email

## Module 6: User Management

- Define user roles
- Understand user roles, functionality and hierarchy
- Managing SpringCM users and contacts
- Understand the difference between security vs. distribution groups
- Learn the core administrator actions within the address book
- Using Personas

## Module 7: Security

- Define security groups
- Understand security permissions
- Best practices for managing security groups



## Module 8: Metadata and Attributes

- Understand the purpose of metadata and attributes
- Learn how to define document attributes
- Explore attribute data types
- Apply attributes to documents

## Module 9: Search

- Identify SpringCM search method types
- Understand how to setup and utilize saved searches
- Learn how to optimize searching options
- 

## Module 10: Reports

- Gain visibility and insights on your document processes with reporting
- Explore pre-defined report options
- Learn how to build custom report

## Module 11: Smart Rules

- Understand the purpose of a smart rule
- Define smart rules
  - Explore core component smart rule definition
- Learn how smart rule configuration management and enablement

## Module 12: Approval Workflows

- Introduction to SpringCM's workflow engine
- Create a simple routing and approval workflow
- Introduction to workflow templates and usage
- Overview of managing approval workflow tasks

## Module 13: Doc Launcher

- Overview of the Doc Launcher tool



- Learn how to configure and use Doc Launcher forms
- Learn how to define Doc Launcher configurations
- Become familiar with the various sources for merging data

#### Module 14: Dashboards

- Understanding the purpose of Dashboards
- Identify the core components of a Dashboard
- Learn how to set up new Dashboards

#### Module 15: Forms

- Form Overview
- Understand the different Form options
- Learn how to define a new Forms