



## Training Guide

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# 1 Summary Information

## 1.1 Update History

Document Version	Software Version	Creation Date
Initial Version	2018.1	4 <sup>th</sup> of April 2018
Update 1	2018.1	23 <sup>rd</sup> of April 2018
Update 2	2018.1	27 <sup>th</sup> of June 2018
Update 3	2018.2	14 <sup>th</sup> of September 2018
Update 4	2018.2	14 <sup>th</sup> of December 2018
Update 5	2019.1	10 <sup>th</sup> of January 2019
Update 6	2019.2	31 <sup>st</sup> of July 2019
Update 7	2019.3	8 <sup>th</sup> of October 2019
Update 8	2020.1	19 <sup>th</sup> of February 2020
Update 9	2020.2	22 <sup>nd</sup> of July 2020

## 2 Training Activities – General Information

This Training Guide contains information about the different uniFLOW Online training courses offered by NT-ware. It lays out the respective target audience, objectives and the course outline.

All of the eLearning material listed is produced and made available in English, French, Italian, German and Spanish.

If you would like further information on the content of the courses, please send an e-mail to: [training@nt-ware.com](mailto:training@nt-ware.com).

# 3 uniFLOW Online training – Sales/ Pre-Sales

## 3.1 uniFLOW Online Training – Sales 1 (eLearning)

**Description:**

This course is the first part of a 2 part course that is designed to provide the sales force with the knowledge required to confidently engage with their customers to sell uniFLOW Online.

**Target audience:**

Sales executives that are responsible for selling uniFLOW Online.

**Prerequisites & Pre-work:** N/A**Objective:**

At the end of this course you will be able to:

- Explain to a customer what the public cloud is
- Explain to a customer the advantages that a public cloud-based solution can bring
- Explain to customers what uniFLOW Online Express is and understand how you can use it to sell uniFLOW Online
- Make customers aware of the costs associated with hosted or on-premise solutions and how a uniFLOW Online solution can reduce these
- Correctly identify and sell the necessary uniFLOW Online subscription licenses to meet a customer's requirements
- Overcome common customer objections surrounding public cloud-based solutions

**Duration:** 30 minutes

**Content:**

- Introduction
- What is the cloud
- Why are customers migrating to the cloud?
- uniflow Online in the public cloud
- uniflow Online Express
- Selling subscription licensing
- Overcoming objections

## 3.2 uniFLOW Online Training – Sales Part 2 (eLearning)

### **Description:**

This course is the second part of a 2-part course that is designed to provide the sales force with the knowledge required to confidently engage with their customers to sell uniFLOW Online.

### **Target audience:**

Sales executives that are responsible for selling uniFLOW Online.

### **Prerequisites & Pre-work:**

uniFLOW Online Training – Sales Part 1 (eLearning)

### **Objective:**

At the end of this course you will be able to:

- Confidently discuss with your customer how uniFLOW Online manages identities
- Present your customer the different device authentication methods that uniFLOW Online has to offer
- Explain the different printing scenarios available in uniFLOW Online and the advantages they would bring to the customer
- Explain how the locations feature within uniFLOW Online simplifies the maintenance and management of devices
- Confidently guide your customer through different scanning features, explaining how they can help improve their existing document processes

**Duration:** 30 minutes

### **Content:**

- Introduction
- Features and functionality of uniFLOW Online
- Learning check
- Course outcome confirmation

## 3.3 uniFLOW Online Training – Sales Update 2020.2 (eLearning)

**Description:**

This update course has been designed to complement the uniFLOW Online Sales Part 1 and Part 2 courses.

**Target audience:**

Sales executives that are responsible for selling uniFLOW Online.

**Prerequisites & Pre-work:** uniFLOW Online Training – Sales Part 1 & 2

**Objective:**

It is built on the knowledge gained in the previously mentioned courses by introducing and explaining the new features and the associated advantages provided by the 2020.2 release of uniFLOW Online.

**Duration:** 30 minutes

**Content:**

- Printing
  - Printing via Cloud for macOS users
  - Universal Output Queue licensing improvement
- Cost centers
- Scanning
  - Filing Assist & My Filing Assist
  - Document split for Scan to Myself
  - Mixed sized document scanning

## 3.4 uniFLOW Online Training for Sales and Pre-Sales Consultants - Classroom

If the eLearning is not suitable for your Sales and/or Pre-Sales teams it may be possible for NT-ware to deliver a classroom-based training session for you. Please contact your local NT-ware Business Development colleague for further details.

# 4 uniFLOW Online training – Technical

## 4.1 uniFLOW Online Essentials – Part 1 (eLearning)

### **Description:**

This uniFLOW Online Essentials Part 1 course provides the knowledge to be able to get a uniFLOW Online tenant up and running quickly. It focuses on the setting up of the core uniFLOW Online services by suggesting a number of processes that can be utilized to add users and devices with the least amount of administrative effort.

For best viewing experience it is recommended to use an alternative web browser to Internet Explorer.

### **Target audience:**

Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

### **Prerequisites & Pre-work:** N/A

### **Objective:**

After completing this course, the participants will be able to:

- Describe the differences between a uniFLOW Online Customer and Management tenant.
- Create a uniFLOW Online Customer tenant.
- Describe the differences between a uniFLOW Online and uniFLOW Online Express tenant
- Utilize the uniFLOW Online Express First Steps Guide to configure a uniFLOW Online Express tenant with minimal administrative effort.
- Configure the tenant to allow users to utilize the Scan to Myself and Scan to Google Drive functionality
- Instruct users on how to register to uniFLOW Online and use the features and services offered
- Utilize the uniFLOW Online documentation to find additional information on tenant features.

**Duration:** 75 minutes

### **Content:**

#### WELCOME

- Welcome to uniFLOW Online
- An end user overview
- Lesson Review

#### OVERVIEW

- An end user overview
- An overview for a tenant administrator
- Lesson Review
- Time for a break

#### CONFIGURATION

- Getting Started
- First Steps Guide
- First Steps Guide Summary
- Document Scanning
- End of course quiz



## 4.2 uniFLOW Online Essentials – Part 2 (eLearning)

### **Description:**

This course builds upon the topics covered in Part 1 to provide the knowledge to fully configure a uniFLOW Online tenant. For best viewing experience it is recommended to use an alternative web browser to Internet Explorer.

### **Target audience:**

Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

### **Prerequisites & Pre-work:**

uniFLOW Online Essentials – Part 1 (eLearning)

### **Objective:**

After completing this course, the participants will be able to:

- Prepare a uniFLOW Online configuration to integrate with a customer's existing environment in relation to user, group, department and device management
- To be aware of what is required to add each type of supported device to the uniFLOW Online tenant
- Define usage tracking with any associated costs and view and/or export this data within Reporting
- Be able to create additional administrator dashboards.
- Be able to access and configure extensions to extend the functionality of a tenant
- Identify which functionality requires additional purchased subscriptions.

**Duration:** 120 minutes

### **Content:**

#### USER MANAGEMENT

- Concept of User Management
- User Management Wizards
- User Management
- User Management Recap
- User Management Quiz

#### DEVICE MANAGEMENT

- Device Management Overview
- Supported Device Types
- Device Policies
- Device Configuration
- Device Management Quiz

#### REPORTING

- Setup Print, Scan and Copy costs
- Viewing Reports

#### MISCELLANEOUS FEATURES

- Tenant Extensions
- Multiple Dashboards

#### SUMMARY

## 4.3 uniFLOW Online – Basic Printing Subscription (eLearning)

### **Description:**

This uniFLOW Online – Basic Printing subscription course provides you with the knowledge to implement the features within a uniFLOW Online tenant that are made available with this subscription.

For best viewing experience it is recommended to use an alternative web browser to Internet Explorer.

### **Target audience:**

Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

### **Prerequisites & Pre-work:**

uniFLOW Online Essentials – Part 1 (eLearning) and uniFLOW Online Essentials – Part 2 (eLearning)

### **Objective:**

After completing this course, the participants will be able to:

- Identify the key planning considerations relating to a uniFLOW Online tenant that has a Basic Printing subscription.
- Be able to determine when to utilize Direct Secure Print versus uniFLOW SmartClient functionality and be able to configure each to meet with a customer's requirements
- Prepare a user's client computer to utilize secure printing with uniFLOW Online
- Configure the tenant to support cloud printing features, e.g. Mobile Print and Print from cloud
- Add additional device types to the uniFLOW Online tenant and be aware of all device prerequisites to support secure printing
- Define Locations and their criteria to support a growing uniFLOW Online installation base.

**Duration:** 120 minutes

### **Content:**

#### INTRODUCTION

- An introduction to Basic Printing
- Prerequisites

#### GENERAL CONFIGURATION

- Location Management
- Mobile Printing

#### SECURE PRINT CONFIGURATION

- Enabling Secure Print
- Direct Secure Print
- uniFLOW SmartClient
- Secure Print Scenario

#### INSTALLATION AND REGISTRATION OF THE PRINTER DRIVER PACKAGE

#### SUMMARY

## 4.4 uniFLOW Online – Email Provider Extension

### **Description:**

This uniFLOW Online - Email Provider course provides you with the knowledge to configure uniFLOW Online to utilize a customer's own email infrastructure.

For best viewing experience it is recommended to use an alternative web browser to Internet Explorer.

### **Target audience:**

Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites & Pre-work:** N/A

### **Objective:**

To equip you with the knowledge to:

- Provide information to a customer on the email infrastructure used to support a uniFLOW Online tenant
- Identify the prerequisites required prior to configuring the **Email provider** extension within uniFLOW Online
- Complete the necessary configuration

**Duration:** 30 minutes

### **Content:**

- Introductory Scenario
- Prerequisites
- Configuration
- Closing Scenario

## 4.5 uniFLOW Online – Technical Update 2020.2 (eLearning)

### Description:

This course covers the new and improved features that will become available with the release of uniFLOW Online 2020.2

In this course you will learn about:

- Improved user management through CSV import mechanism
- The new Cost Center extension
- The new Scan Center extension and how to access a complete training schedule on this topic
- uniFLOW SmartClient for Mac improved usability
- Improved scanning through:
  - Large PDF splitting
  - Support for Therefore Online's primary fields and case search
  - Canon imageRUNNER ADVANCE DX series free-size support

### Target audience:

Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

### Prerequisites & Pre-work:

uniFLOW Online Essentials – Part 1 (eLearning) and uniFLOW Online Essentials – Part 2 (eLearning)

### Objective:

At the end of this course you will be able to:

- More easily import, update and delete users via the improved CSV structure
- Configure the new scanning improvements based on customer requirements
- Configure the uniFLOW SmartClient for Mac so that it supports the Print via Cloud functionality
- Configure the two new scanning features, Filing Assist and My Filing Assist and use them via the new uniFLOW Online extension named Scan Center
- Use the new Metadata manager extension that will give user control over SharePoint Online and Therefore Online document metadata.
- Create, assign and report against the new Cost Center functionality.

**Duration:** 45 minutes

### Content:

#### New Extensions

- Scan Center and Metadata Manager extensions
- Cost Center extension

#### Updated features

- User Management
- Scanning improvements
- uniFLOW SmartClient for Mac
- Subscriptions and licenses
- Scan processing
- Scan distribution

## 4.6 MiCard MultiTech4 card reader (eLearning)

### Aim:

This course will explain its features and the differences between the available versions. By means of a customer scenario we will demonstrate the numerous possibilities and huge flexibility of this card reader and guide you through the proper configuration of the card reader via the AppBlaster (NT-ware Edition).

### Objective:

At the end of this course, you will be able to:

- Choose the MiCard MultiTech4 version that best suits the customer needs
- Use the AppBlaster (NT-ware Edition) to configure the MiCard MultiTech4 in Tracer Mode to identify the card technology on an unknown card right away
- Configure the MiCard MultiTech4 via the AppBlaster (NT-ware Edition) to read out the card technologies the customer has in use

### Target audience:

- Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Level of training:** Foundation

**Prerequisites:** N/A

**Pre-work:** N/A

### Delivery:

Format:	eLearning
Duration:	60 min
Language:	English

### Content:

- Product Versions and Features
- Customer Scenario
- AppBlaster (NT-ware Edition)
- End of Course Quiz

**Certification:** N/A

## 4.7 uniFLOW Online – Scanning Courses

This set of eLearning courses are focused on scanning and document processing within uniFLOW Online. They will further expand your knowledge allowing you to understand, install and support scanning and document processing in a uniFLOW Online environment.

### 4.7.1 Introduction to scanning with uniFLOW Online

**Aim:**

The purpose of this short training is to give you a basic knowledge of uniFLOW Online scanning. You will learn more about:

- The scan functions and destinations available to users
- The architecture behind uniFLOW Online digitization
- Items that must be in place before you can start a scan

**Objective:**

Once this training is completed, you will be able to continue the learning path, which will give you a better understanding of digitization and the document processing capabilities offered by uniFLOW Online.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:** uniFLOW Online Essentials – Part 1 (eLearning) and uniFLOW Online Essentials – Part 2 (eLearning)

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	20 min
Language:	English

**Content:**

- Digitization, processing and distribution
- AppBlaster (NT-ware Edition)
- Prerequisites for digitization

**Certification:** N/A

### 4.7.2 Configuring and authorizing scan destinations

**Aim:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- Device management within uniFLOW Online
- User management within uniFLOW Online
- The scan functionality offered by uniFLOW Online

**Objective:**

Once completed you will be able to progress further upon the learning path, learning how to install scan profiles; thus, making them available to end users.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- Device management within uniFLOW Online
- User management within uniFLOW Online
- The scan functionality offered by uniFLOW Online

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	1 h
Language:	English

**Content:**

- Destination overview
- Scan to Myself
- Pre-configured cloud storage
- SharePoint Online/ OneDrive for Business
- Therefore Online
- SAP Concur
- End user authorization
- Learning confirmation

**Certification:** N/A

## 4.7.3 Configuring and installing scan profiles

**Aim:**

This course prepares you for deploying scanning within a uniFLOW Online environment by equipping you with the knowledge required to configure and install scan profiles. You will learn about:

- Scan profile installation
- The available scan processing features
- Adapting the view at the device and restricting access to scan profiles

**Objective:**

Once completed you will be prepared for deploying scanning within a uniFLOW Online environment.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- Device management within uniFLOW Online
- User management within uniFLOW Online
- The scan functionality offered by uniFLOW Online
- The scan destinations available within uniFLOW Online

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	1 h
Language:	English

**Content:**

- Scan profile overview
- Installing scan profiles
- Scan Processing
- Device view and access control
- End of course quiz

**Certification:** N/A

## 4.7.4 Enhanced document processing with Filing Assist

**Aim:**

This course is aimed to provide you with the knowledge required to consult with, and support a customer using uniFLOW Online to meet their document processing needs. You will learn about:

- Document digitization
- Filing Assist specific scan profiles
- Defining and extracting metadata
- Training document and automating their processing
- The security available for document processing

**Objective:**

Once completed you will be prepared to offer the support a customer might need to meet their document processing needs.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- Device management within uniFLOW Online
- User management within uniFLOW Online



- The scan functionality offered by uniFLOW Online
- Configuring and installing scan destinations within uniFLOW Online
- Configuring and installing scan profiles within uniFLOW Online
- 

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	1 h
Language:	English

**Content:**

- Introduction
  - Introduction
  - Document digitization overview
  - What is metadata and how is it used?
- Scanning regular, repetitive documents
  - Filing Assist scan profiles
  - Metadata defined in cloud storage destinations
  - Working with Filing Assist
- Security and Auditing
  - Access control, Scan job history and data security
- Completion
  - Learning Confirmation

**Certification:** N/A

## 4.7.5 Processing ad-hoc documents with My Filing Assist

**Aim:**

We aim to furnish you with the knowledge required to consult with, and support a customer using uniFLOW Online to meet their document processing needs. You will learn about:

- Where and why to use My Filing Assist
- The My Filing Assist specific scan profile
- User driven document processing

**Objective:**

By completing this course, you should have a good understanding of how the My Filing Assist scan profile and its user driven document processing can be used. This, combined with the knowledge gained from the 'Enhanced document processing with Filing Assist' elearning course, should enable you to provide a complete document processing solution for a customer.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- 
- Device management within uniFLOW Online
- User management within uniFLOW Online
- The scan functionality offered by uniFLOW Online

- Configuring and installing scan destinations within uniFLOW Online
- Configuring and installing scan profiles within uniFLOW Online

Further to the above, the learning in this course relies on the knowledge gained from completing the 'Enhanced document processing with Filing Assist' eLearning course. Please ensure you have completed that course before continuing with this one.

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	30 min
Language:	English

**Content:**

- Introduction
- Processing ad-hoc documents
  - Introducing My Filing Assist
  - My Filing Assist scan profile
  - Processing documents submitted via My Filing Assist
- Completion
  - Learning Confirmation

**Certification:** N/A

## 4.7.6 Data extraction and validation with Metadata manager

**Aim:**

We aim to build upon your existing Filing Assist knowledge, to enable you to consult with, and support a customer using uniFLOW Online to meet their document processing needs.

You will learn about:

- The Metadata manager extension
- Data extraction
- Data validation
- Processing documents in Filing Assist with Metadata manager rules

**Objective:**

Once this course has been completed, you should be able to advise a customer on how the Metadata manager can assist in providing more control over SharePoint Online and Therefore Online document metadata.

**Target audience:** Technicians that are responsible for the installation, configuration & support of uniFLOW Online.

**Prerequisites:**

This course relies on the learner having a good basic knowledge of uniFLOW Online, as such a good understanding of the following topics is required:

- Device management within uniFLOW Online
- User management within uniFLOW Online
- The scan functionality offered by uniFLOW Online
- Configuring, installing and authorizing scan destinations within uniFLOW Online
- Configuring and installing scan profiles within uniFLOW Online

Further to the above, the learning in this course relies on the knowledge gained from completing the 'Enhanced document processing with Filing Assist' eLearning course. Please ensure you have completed that course before continuing with this one.

**Pre-work:** N/A

**Delivery:**

Format:	eLearning
Duration:	45 min
Language:	English

**Content:**

- Introduction
- Metadata manager overview
- Data extraction
- Data validation
- Working with Metadata manager
- Completion
  - Learning Confirmation

**Certification:** N/A

# 5 uniFLOW Online Training Videos

The videos listed below are used within the Technical eLearning and the 'uniFLOW Online' online help. They are all produced in English but when accessed via the 'uniFLOW Online' online help, EFIGS and Japanese subtitles are available.

Topic	Duration
User Overview	10:01
Administrator Overview	05:29
User Management - Manual User Creation	07:59
User Management - Email Signup	08:07
User Management - Office 365	06:25
User Management - Active Directory Advanced	19:51
User Management - CSV Import	08:14
User Management - Add External Account	04:45
Device - Price Profiles	04:39
Device Registration - uniFLOW Release Station Onboarding	06:24
Device Policies	03:51
Basic Printing – Introduction	05:03
Basic Printing – User Overview	05:08
Scan Destinations Configuration – SAP Concur	02:12
Multiple Dashboards	04:54
User – Add missing information	01:20
User – Creation from the device	01:13
User – Email Sign-up	01:59
User – PinCode/Card registration code generation	00:38