



Training Guide

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1 Summary Information

1.1 Update History

Document Version	Software Version	Creation Date
Initial Version	2018.1	4 th of April 2018
Update 1	2018.1	23 rd of April 2018
Update 2	2018.1	27 th of June 2018
Update 3	2018.2	14 th of September 2018
Update 4	2018.2	14 th of December 2018
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Update 6	2019.2	31 st of July 2019
Update 7	2019.3	8 th of October 2019
Update 8	2020.1	19 th of February 2020
Update 9	2020.2	22 nd of July 2020
Update 10	2020.3	27 th of October 2020
Update 11	2021.1	2 nd of February 2021
Update 12	2021.2	3 rd of September 2021
Update 13	2022.1	16 th of February 2022
Update 14	2022.1	21 st of February 2022
Update 15	2022.2	27 th June 2022

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.

3 uniFLOW Online training – Sales/ Pre-Sales

3.1 1.uniFLOW Online Training – Sales Part 1

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 2.uniFLOW Online Training – Sales Part 2

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
 - User management
 - New device UI (Early access)
 - Printing
 - Scanning
 - Cost tracking
- Learning check
- Course outcome confirmation

3.3 3.uniFLOW Online Training – Sales Release Update

Description:

This update course has been designed to introduce and explain the new features and associated advantages provided by the release of both uniFLOW Online 2022.1 & uniFLOW 2022 LTS.

Target audience:

Sales executives that are responsible for selling uniFLOW Online & uniFLOW.

Prerequisites & Pre-work: uniFLOW Online Training – Sales Part 1 & 2 and previous update courses

Objective:

To equip the salesperson with the knowledge to explain to customers the benefits the new features and improvements bring to them.

Duration: 25 minutes

Content:

- uniFLOW Online 2022.1
 - Extending scanning capabilities
 - Passwordless user accounts
 - Continuing the journey of the new device UI
 - Miscellaneous improvements
 - Device information collection on Canon imageRUNNER ADVANCE & imageRUNNER ADVANCE with AddOn Platform devices
- uniFLOW 2022 LTS
 - Extended user synchronization options for uniFLOW in Hybrid mode

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 Foundation Training

The uniFLOW Online Foundation Training is comprised of small individual courses designed to introduce uniFLOW Online's capabilities to the learner.

4.1.1. uFO01 – uniFLOW Online and the public cloud

Description:

This course has been designed to help explain what the cloud is, what are its benefits and where does uniFLOW Online fit.

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:

- Explain to customers and your colleagues what the public cloud is
- Explain to customers and your colleagues the advantages that a public cloud-based solution can bring
- Explain to customers and your colleagues what a tenant is and the advantages tenant isolation brings
- Explain to customers and your colleagues the tenant hierarchy within uniFLOW Online, and how there are two distinct tenant types
- Explain to customers or your colleagues what uniFLOW Online Express is and how it can be upgraded to uniFLOW Online
- Advise your peers on which device types are supported by uniFLOW Online and how the device type can influence the uniFLOW Online features available.

Duration: 60 minutes

Content:

- Before we get started
- introduction
- What is the cloud?
- Why are customers migrating to the cloud?
- uniFLOW Online in the public cloud
- uniFLOW Online Express
- Subscription licensing
- Device support
- Course summary
- Course complete

4.1.2. uFO02 – Tenant operations

Description:

This course will prepare you for future learning by equipping you with a base knowledge of tenant management in uniFLOW Online.

Target audience:

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

Prerequisites & Pre-work: uFO01 - uniFLOW Online and the public cloud eLearning course

Objective:

- Demonstrate a solid understanding of the uniFLOW Online tenant hierarchy, how it facilitates customer support and supports the management of subscriptions.
- Detail the 3 different tenant creation methods and the feature set that each type offers, depending on the subscription model.
- Describe and undertake the process of claiming a customer's uniFLOW Online Express tenant.
- Use the uniFLOW Online subscriptions guide to identify which subscriptions are needed per feature.
- Manage uniFLOW Online subscriptions for customer tenants within a management tenant.
- Configure a customer tenant to allow access from a higher-level management tenant via an external account.

Duration: 90 minutes

Content:

- uniFLOW Online Tenants
 - Tenant creation overview
 - Creating tenants
 - Creating a tenant within a management tenant
 - Tenant creation at the device
 - Tenant creation via the tenant registration website
- Tenant Subscriptions
 - Introduction to subscriptions
 - Claiming a customer tenant
 - Activating subscriptions
- Ongoing support for a customer tenant
 - Supporting a customer tenant
 - Tenant deletion
 - Ongoing support summary

4.1.3. uFO03 – Locations

Description:

This course explores how locations are an important consideration concerning reporting, configuration, user experience, and scaling.

Target audience:

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

Prerequisites & Pre-work: uFO01 - uniFLOW Online and the public cloud; uFO02 – Tenant Operations eLearning courses

Objective:

- Describe to your peers what uniFLOW Online Locations are
- Be able to demonstrate how Locations can aid in the management of the tenant's resources
- Be able to identify when a tenant may need Locations
- Be able to create a Location hierarchy and Location parameters
- Be aware that Locations directly influence some uniFLOW Online features

Duration: 40 minutes

Content:

- Overview of locations
- Location creation
- Location assignment

- Are locations needed and what configuration should be used?

4.1.4. uFO04a – Device onboarding

Description:

This course explores the steps required for successful device onboarding.

Target audience:

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

Prerequisites & Pre-work: uFO01 - uniFLOW Online and the public cloud; uFO02 – Tenant Operations; uFO03 - Locations eLearning courses

Objective:

At the end of this course, you will:

- Be able to describe the results of having onboarded the devices into uniFLOW Online
- Be aware of the various supported device types and their variants, and any pre-onboarding steps required
- Understand what onboarding methods are available and applicable to which devices
- Be able to add devices using the different onboarding methods
- Be able to assign subscriptions to devices during the onboarding process

Duration: 120 minutes

Content:

- Before we get started
- Introduction
- What you should know before onboarding a device
- Supported device types
- Available applets
- Local user interface onboarding
- Device setup utility onboarding
- Manual onboarding
- Network printers
- Managing device-based subscriptions
- Course summary
- Course complete

4.1.5. uFO04b – Ongoing device management

Description:

This course explores what are the steps following a successful device onboarding.

Target audience:

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

Prerequisites & Pre-work: uFO04a – Device onboarding eLearning course

Objective:

At the end of this course, you will:

- Be aware of and able to describe the different login methods and behavior options available and what is supported per device type
- Be able to describe the Device information fields of a device and what relevance they have
- Be aware how to update a device individually and in bulk using the Device update wizard

- Be able to limit access to device features using Device Policies
- Be able to remove a device from uniFLOW Online and be able to describe the implications
- Be able to move a device to a different uniFLOW Online tenant.

Duration: 120 minutes

Content:

- Login options and device configuration
- Device information fields
- Updating device software
- Device policies
- Deleting or moving devices

4.1.6. uFO05 – Basic user management

Description:

This course covers an introduction to user management and will include manual user creation, device-based user creation, email self sign-up, bulk import, and touch on bulk management and deletion.

Target audience:

Individuals responsible for, or who are interested in, creating and managing users in uniFLOW Online.

Prerequisites & Pre-work: uFO02 –Tenant operations eLearning course

Objective:

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

- Explain the concept of users within uniFLOW Online to your peers and describe the difference between a user entity, user identity, and what is meant by the term trained identity
- Utilize each of the default log in options available with a newly created tenant
- Configure a tenant to support log in and registration via email
- Configure a tenant to support log in and registration via Microsoft and Google accounts
- Identify the user identity requirements for a user based on the uniFLOW Online functionality required.
- Undertake extended learning on Bulk management of users in uniFLOW Online
- Be able to manage a tenants log in options via Identity Providers extension

Duration: 120 minutes

Content:

- Concept of the user object
- User Creation
- Ongoing user management
- Course summary

4.1.7. uFO06 – Roles, groups & access control

Description:

This course aims to equip the learner with the knowledge needed to identify when a customer may require users with different roles within their tenant and implement them. The learner will also suggest when the use of groups is required and how these are managed within the tenant.

Target audience:

Individuals responsible for, or who are interested in, creating and managing roles, groups & access control in uniFLOW Online.

Prerequisites & Pre-work: uFO05 –Basic user management eLearning course

Objective:

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

- List the main roles within uniFLOW Online and assign them to a user
- Be able to describe to your peers how groups are used uniFLOW Online
- Describe the methods available to create groups and modify group membership
- Manage group management via the uniFLOW Online user interface
- Utilize groups with device-based Access control to determine the device features a user has access to

Duration: 30 minutes

Content:

- uniFLOW Online Roles
- uniFLOW Online Groups
- Group utilization

4.1.8. uFO07 – Printing with uniFLOW Online Express

Description:

This course will guide learners through the configuration required for printing and accounting with uniFLOW Online Express.

Target audience:

Individuals who are implementing uniFLOW Online Express.

Prerequisites & Pre-work: N/A

Objective:

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

- Describe the functional differences between uniFLOW Online and uniFLOW Online Express
- Provide secure print through Canon's Forced Hold device-based technology
- Account for print when printing directly to devices

Duration: 40 minutes

Content:

- Introduction
- uniFLOW Online Express
- Direct printing
- Associating users
- Accounting only
- Summary
- Learning check

4.1.9. uFO08 – Direct Secure Print

Description:

This course will guide learners through the configuration required for printing and accounting with the Direct Secure Print feature.

Target audience:

Individuals who are implementing uniFLOW Online.

Prerequisites & Pre-work: N/A

Objective:

At the end of this course, you will:

- Be able to describe the Direct Secure Print feature to your peers and list its requirements
- Know how to configure and use Direct Secure Print in Windows and macOS environments
- Know how to configure exceptions, allowing chosen users to bypass Direct Secure Print
- Be able to identify and explain the limitations of Direct Secure print and suggest how these can be overcome by utilizing the uniFLOW SmartClient

Duration: 90 minutes

Content:

- Introduction
- What is Direct secure print?
- Direct secure print in detail
- Associating users
- Allowing exceptions
- Learning check
- Summary

4.1.10. uFO09 – uniFLOW SmartClient – Foundation

Description:

This course introduces the uniFLOW SmartClient, a software client installed on user's client computers, providing support for many uniFLOW Online features.

Target audience:

Individuals who are implementing uniFLOW Online.

Prerequisites & Pre-work: N/A

Objective:

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

- Enable the uniFLOW SmartClient extension
- Configure and create the uniFLOW SmartClient installer for both Windows and Mac
- Install and register the uniFLOW SmartClient on a client computer for a user and be aware of the user identity requirements
- Configure the uniFLOW SmartClient print job handling using both the default and print via cloud configurations
- Describe to a peer how the default and print via cloud configurations impact the local network requirements at a customer
- Determine how the uniFLOW SmartClient establishes which uniFLOW Online location it is assigned to

Duration: 120 minutes

Content:

- Introducing the uniFLOW SmartClient
 - About the uniFLOW SmartClient
 - User Identities
- Installation and Registration
 - uniFLOW SmartClient Registration
 - uniFLOW SmartClient installation and registration
- uniFLOW SmartClient Print job handling
 - uniFLOW SmartClient print process
 - Print job handling configuration
 - uniFLOW SmartClient location-awareness
 - Should it all go wrong

4.1.11. uFO11 – uniFLOW Online Mobile printing

Description:

Once complete you will be able to progress further upon the learning path expanding your understanding uniFLOW Online' features and functionality.

Target audience:

This course is aimed at technical individuals who are responsible for scoping, deploying or configuring mobile printing within a uniFLOW Online tenant.

Prerequisites & Pre-work: N/A

Objective:

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

- Describe to a customer the concept of mobile printing both as a known user and as a guest
- Ensure the necessary required elements for mobile printing in uniFLOW Online are in place prior to beginning an installation
- Configure Mobile print in uniFLOW Online
- Advise a customer that, if desired, they can use their own email infrastructure

Duration: 45 minutes

Content:

- Before we get started
- introduction
- What is mobile printing?
- Requirements
- Configuration
- Course summary
- Course complete

4.1.12. uFO15 – Introduction to scanning with uniFLOW Online

Description:

This short course prepares you for future learning by equipping you with a base knowledge of uniFLOW Online scanning. You will learn about:

- The scan features and destinations available to users
- The architecture underpinning uniFLOW Online scanning
- The elements that are required to be in place before scanning can commence

Target audience:

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

Prerequisites & Pre-work: N/A

Objective:

Once complete you will be able to progress further upon the learning path expanding your understanding of scanning and the document processing capabilities uniFLOW Online provides.

Duration: 30 minutes

Content:

- Introduction
- Scan, process, distribute
- Achitecture

- Prerequisites to scanning

4.1.13. uFO16 – Configuring and authorizing scan destinations

Description:

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

Target audience:

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

Prerequisites & Pre-work: uFO15 - Introduction to scanning with uniFLOW Online eLearning course

Objective:

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

- The scan to myself function
- The configuration required to enable cloud storage providers as destinations within uniFLOW Online
- How end users authorize their accounts to allow uniFLOW Online to store files in these cloud storage providers

Duration: 90 minutes

Content:

- Introduction
- Destinations overview
- Scan to myself
- Pre-configured cloud storage
- SharePoint Online / OneDrive for Business
- Therefore Online
- SAP Concur
- Rakuraku-Seisan
- End user authorization
- Learning confirmation

4.1.14. uFO17 – Configuring and installing scan profiles

Description:

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

Target audience:

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

Prerequisites & Pre-work: uFO15 - Introduction to scanning with uniFLOW Online; uFO16 – Configuring and authorizing scan destinations eLearning courses

Objective:

You will learn about:

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

Duration: 45 minutes

Content:

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

4.1.15. uFO21 – Reporting in uniFLOW Online

Description:

This course covers reporting in uniFLOW Online.

Target audience:

This course is aimed at technical individuals who are responsible for scoping, deploying or configuring pricing and reporting within a uniFLOW Online tenant.

Prerequisites & Pre-work: N/A

Objective:

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

- Explain the different report types and the concept behind reporting in uniFLOW Online to your peers
- Configure pricing within a tenant on a per device level
- Export data to a CSV file, define the delimiter type and explain to a customer how this exported data can be used for further analysis
- Make a customer aware that the CSV data download can be scheduled outside of uniFLOW Online via PowerShell

Duration: 60 minutes

Content:

- Before we get started
- Introduction
- Reporting overview
- Reporting in uniFLOW Online
- Price profiles
- Configurable options & accounting data upload
- Course summary
- Course complete

4.1.16. uFO25 – Universal Output Queue

Description:

This course covers the Universal Output Queue extension within uniFLOW Online. This feature extends the functionality of the uniFLOW SmartClient in allowing users to print directly to devices as opposed to printing via secure release.

Target audience:

This course is aimed at technical individuals who are responsible for scoping, deploying or configuring printing with the Universal Output Queue within a uniFLOW Online tenant.

Prerequisites & Pre-work: N/A

Objective:

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

- Describe to your peers the functionality the Universal Output Queue provides
- Advise a customer on the network requirements of the feature
- Add and configure the Universal Output Queue extension on a location by location basis
- Determine the devices available to a user for direct printing via the feature and remove/add devices to the list on a per-location basis and per user/group basis.

Duration: 50 minutes

Content:

- What is the Universal Output Queue
- Device and network requirements
- Configuration

4.1.17. uniFLOW Online Learning Paths

The uniFLOW Online Foundation training courses can be further grouped together in different ways to create learning paths that suit specific requirements. In the below table you can find 8 learning paths, their intended use and the courses that help build them.

Learning path	Description	Containing courses
Creating and managing uniFLOW Online tenants	Introduces the learner to the concept of cloud computing and how uniFLOW Online sits within this. It then moves onto the management of uniFLOW Online tenants, including creation, subscription assignment, supporting a customer, and creating a tenant location hierarchy. It is aimed at learners new to cloud computing who will be responsible for uniFLOW Online tenant management.	uFO1, uFO2, uFO3
Registering and managing devices within uniFLOW Online	Aimed at learners who will be responsible for onboarding devices into uniFLOW Online. Including device registration, device applet updating, the configuration of the device login / secure print experience, applying device policies, and location/subscription assignment.	uFO3, uFO4a, uFO4b
Managing users in uniFLOW Online	Introduces the learner to the concept of users within uniFLOW Online, covering manual user creation, including via CSV. Additionally, covering how users can be assigned to groups and roles and how this can facilitate controlling access to the tenant and uniFLOW Online features.	uFO5, uFO6
Clientless printing with uniFLOW Online	For learners looking to incorporate printing and print accounting into a uniFLOW Online Express tenant, including using the Canon Forced hold device feature. Then expanding on how Canon forced hold can be extended to support basic 'My Print Anywhere' using the uniFLOW Online feature Direct Secure Print on a per-location basis.	uFO3, uFO7, uFO8
Printing with uniFLOW Online	Introduces the learner to the uniFLOW SmartClient and how many uniFLOW Online features utilize it. Then moving on to the configuration of the uniFLOW SmartClient extension to extend	uFO3, uFO7, uFO9

	printing to support 'My Print Anywhere' across all devices managed by a tenant.	
Supporting mobile workers and guests	For learners looking to build on their printing and accounting knowledge of uniFLOW Online by understanding how guest and mobile workers can be included within a solution.	uFO3, uFO7, uFO9, uFO11
Scan, process, and distribute with uniFLOW Online	Introduce learners to the concept of scanning within uniFLOW Online. Covering the available destinations, how uniFLOW Online connects to them, and how they are made available to end-users.	uFO6, uFO15, uFO16, uFO17
Working with uniFLOW Online reports	For learners looking to apply pricing to device usage and demonstrate the various reporting views that uniFLOW Online supports, including the export of accounting data to be analyzed offline.	uFO03, uFO06, uFO021

4.2 1.uniFLOW Online – Cost centers

Description:

This uniFLOW Online Cost Centers course provides you with the knowledge to configure the Cost Centers extension.

This course is an extensions course and, as such, only covers the functionality relevant to the extension. Features and technologies outside of the scope of the extension are not explained, as it is assumed the learner already has a base knowledge of uniFLOW Online.

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 available cost center functionality in uniFLOW Online and how it can be used to support their requirements
- Configure the uniFLOW Online Cost Center extension
- Be able to answer common questions customers may have relating to the cost center functionality

Duration: 30 minutes

Content:

- Overview of cost center functionality
- Considerations
- Knowledge check
- Managing cost centers
- Defining cost center defaults
- Enabling cost center selection
- Cost center management via Powershell
- Common question and answers
- Viewing cost center reports

4.3 2.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
- Identity 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

4.4 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

Duration: 60 minutes

Target audience:

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

Level of training: Foundation

Prerequisites: N/A

Content:

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

Certification: N/A

4.5 uniFLOW Online – Scanning Courses

This set of eLearning courses are focused on scanning and document processing within uniFLOW Online. The courses listed below build upon the knowledge gained from the 3 Foundation training courses related to scanning: uFO15 – Introduction to scanning with uniFLOW Online, uFO16 – Configuring and authorizing scan destinations & uFO17 – Configuring and deploying scan profiles.

They will further expand your knowledge allowing you to understand, install and support scanning and document processing in a uniFLOW Online environment.

4.5.1 1.Enhanced document processing with Filing Assist

Aim:

In this course we will look at how uniFLOW Online can enhance a customer's document digitization workflow.

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.

Objective:

You will learn about:

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

Duration: 30 minutes

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

Prerequisites:

- 'Introduction to scanning with uniFLOW Online' eLearning course
- 'Configuring and authorizing scan destinations' eLearning course
- 'Configuring and installing scan profiles' eLearning course

Content:

- Introduction
- Document digitization overview
- What is metadata and how is it used?
- Filing Assist scan profiles
- Metadata defined in cloud storage destinations
- Working with Filing Assist
- Managing learned templates
- Delegating scan processing

- Access control, Scan job history & data security
- Learning confirmation

Certification: N/A

4.5.2 2.Processing ad-hoc documents with My Filing Assist

Aim:

My Filing Assist allows users to process scanned documents at their computer. It leverages technology provided by the Filing Assist tool with the Scan Center extension.

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.

Objective:

You will learn about:

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

Duration: 30 minutes

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

Prerequisites:

- 'Introduction to scanning with uniFLOW Online' eLearning course
- 'Configuring and authorizing scan destinations' eLearning course
- 'Configuring and installing scan profiles' eLearning course
- 'Enhanced document processing with Filing Assist' eLearning course

Content:

- Introduction
- Introducing My Filing Assist
- My Filing Assist scan profile
- Processing documents submitted via My Filing Assist
- Learning confirmation

Certification: N/A

4.5.3 3.Data extraction and validation with Metadata manager

Aim:

In this course we will look at how uniFLOW Online's Metadata manager can enhance a customer's document digitization workflow.

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.

Objective:

You will learn about:

- The Metadata manager extension
- Data extraction

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

Duration: 30 minutes

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

Prerequisites:

- 'Introduction to scanning with uniFLOW Online' eLearning course
- 'Configuring and authorizing scan destinations' eLearning course
- 'Configuring and installing scan profiles' eLearning course
- 'Enhanced document processing with Filing Assist' eLearning course
- 'Processing ad-hoc documents with My Filing Assist' eLearning course

Content:

- Introduction
- Metadata manager overview
- Data extraction
- Data validation
- Working with Metadata manager
- 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