

# LibertyNET Administrator Training

**T**hank you for your interest in LibertyNET and the LibertyNET Administrator training. LibertyNET is a powerful and feature-rich document storage and retrieval software solution. To ensure that you fully leverage your software investment, Hyland Software offers a variety of training programs to help you utilize the full functionality of LibertyNET.

The objective of LibertyNET Administrator Training is to prepare the LibertyNET user to administer or design LibertyNET applications or build custom functionality to an existing LibertyNET application. In this course you will explore more various functions of LibertyNET, such as folder options, security, customizing rule templates, advanced printing, LibertyNET Web, packager, scheduled actions and more.

In this packet you will find:

1. Training Request Form
2. Course Description
3. Directions to Liberty IMS
4. Travel Information

LibertyNET offers turnkey management solutions that include a wide range of capabilities, including document imaging, electronic document management, records management, process automation, workflow, COLD/ERM, e-forms, and email management.

Solutions are created using the LibertyNET Application Builder (LAB). This is a rapid application development environment that allows the user to design, deploy, maintain, web enable and extend the capabilities of the LibertyNET software solution. These capabilities are available to those with no programming ability, lowering total cost of ownership.

For more information contact (714) 751-6900, [registration@libertyims.com](mailto:registration@libertyims.com) or [www.onbase.com/English/Products/Liberty/LibertyTraining](http://www.onbase.com/English/Products/Liberty/LibertyTraining).



# Training Request Form

<b>Company Name:</b>			
<b>Attendee Name:</b>			
<b>Attendee Phone:</b>		<b>Email:</b>	
<b>Attendee Address: (Street Address)</b>			
<b>Class Requested:</b>			
<b>Class Date(s):</b>			
<b>Technical Level:</b>	<input type="checkbox"/> User <input type="checkbox"/> Salesperson <input type="checkbox"/> Systems Eng. <input type="checkbox"/> Programmer <input type="checkbox"/> Other		
<b>Solution Provider (SP) Name:</b>	If applicable enter SP Name: _____		
<b>Payment Terms:</b>	<input type="checkbox"/> SP Support Package <input type="checkbox"/> Purchase Order # _____ <input type="checkbox"/> Other: _____ <i>Payment must be received no later than 1 week before the class.</i>		
<i>Liberty IMS use ONLY</i>	<b>Confirmed by:</b> _____ <b>Date:</b> _____		

### Prerequisites

Before attending class, please familiarize yourself with Windows and complete the LibertyNET online tutorial. For help installing the tutorial, call Technical Support at (714) 751-6900, X230.

### Breakfast & Lunch

Continental breakfast and lunch is served to all attendees each day. If you have any special food requests, please contact the Training Coordinator at (714) 751-6900, X230 to make arrangements.

### Class Times

Class starts promptly at 8 a.m. and is scheduled to run until 5 p.m. *each day*. There is a one hour lunch break, and various small breaks throughout the class day. Training is held in Suite #260 of the Liberty Building.

### Scheduling & Cancellation Policy

Liberty IMS reserves class space on a first-come, first-served basis. We will try to schedule you for your first choice of dates. All training requests and payment must be received by Liberty IMS at least one week before class. Liberty IMS understands that schedules sometimes need to be changed. *Cancellations/rescheduling must be received by Liberty IMS, in writing at least one week prior to the class start date or you will be charged a 50% cancellation fee. (Notify: [Registration@LibertyIMS.com](mailto:Registration@LibertyIMS.com))* Liberty IMS reserves the right to cancel or reschedule any LibertyNET training class.

### Customer Authorization

The above attendee is authorized to attend the requested class. All charges for this class will be paid one week prior to the first day of training. *Please send the completed form to: [Registration@LibertyIMS.com](mailto:Registration@LibertyIMS.com)*

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_



# Course Description

## LibertyNET Administrator Training, 5 Days

### Who Should Attend

This course provides the Administrator with skills required for using the LibertyNET system to manage documents and perform supervisory level administration of the LibertyNET system. It is recommended for advanced LibertyNET users, sub-administrators and technical support staff.

### What you will learn

- Introduction to LibertyNET
- Document Retrieval
- Manage: Using LibertyNET Documents
- Using LibertyNET's Folders & Documents
- Advanced Retrieval
- Scanning & Indexing
- Creating a LibertyNET Application
- Creating Stations, Users, and Groups
- Creating Folders
- Creating Index Forms
- Creating Document Requests
- Capture - Working with Native documents
- Creating Rule Templates
- Capture – Image Recognition
- Securing Objects
- Internal Links
- Advanced Printing
- Packager
- Advanced Image Recognition
- Scheduled Actions
- Using Log Files and Ini Settings
- Event Director
- XML WEB Services

### Course Objectives: Day 1

#### Introduction to LibertyNET

- Relate the various LibertyNET modules and describe one application or each module.
- Log in and out of LibertyNET.
- Describe the five sections of the LibertyNET environment.

#### Document Retrieval

- Perform a document request.
- View documents from a document list.



### Using LibertyNET Documents

- Define a LibertyNET document.
- Open and customize the view of the document by rotating, zooming and utilizing LibertyNET's view options.
- Navigate from one page in a document to the next.
- Markup the document and modify/delete these markups.
- Place page tags and page comments on pages and modify/delete these.
- Place StickyNotes on a document and modify/delete these.
- Print documents.

### Using LibertyNET's Folders & Documents

- Describe how LibertyNET stores document.
- Change from Document View to Page View.
- Copy, move or delete documents and pages.
- Sort documents in a folder or document list.

### Advanced Document Retrieval

- Modify the parameters for existing document requests.
- Explain the difference between Full Text & Non-Full Text document requests.
- Perform a Full Text document requests.
- Apply Boolean Logic in a full text search.
- Use P.O.I.N.T. to identify what part of the document matched the search criteria.
- View the criteria using highlighted text.

### Indexing

- Index a new document or modify an existing document's index.

### Customizing LibertyNET

- Set preferences for a folder.
- Add buttons to an existing toolbar.
- Hide/display toolbars.
- Create bookmarks to LibertyNET documents.

**Course Objectives: Day 2-5****Creating a LibertyNET Application**

- Create a new system from the Default Application.
- Open and update the Liberty.ini file.
- Use LibertyNET Path Macros.
- Describe the file architecture of a LibertyNET system.

**Creating Stations, Users, and Groups**

- Create and manage stations.
- Create and manage users.
- Create and manage groups.
- Administer privileges via users and/or groups.
- Describe five user privileges.

**Creating Folders**

- Create and manage Folders.
- Create and use the XYZ file storage structure.
- Create a SQL folder using ODBC.
- Create a Liberty Data Engine (LDE) folder.
- Specify the number of key fields a folder will allow.

**Creating Folder Views**

- Create folder columns.
- Create a Folder View using folder columns.
- Apply the View to a folder and a document request.

**Creating Index Forms**

- Create index forms.
- Define input and display masks.
- Create forms using Field security.
- Create Input Formats.

**Creating Document Requests**

- Create a Document Request.
- Run a document request.

**Working with Native documents**

- Import an electronic document using File>Import Files.
- Enable & use ODMA to import Word documents.
- Use the Auto Launch feature with electronic documents.
- View/modify document in native application.

- Print a document into LibertyNET.
- Import a PDF Document into LibertyNET and search text within it.

### Creating Rule Templates

- Create a rule template that moves documents based on form type.
- List 3 actions that can be performed by a Rule Template.
- Distribute and secure documents based on a field value.
- Add an INI setting.

### Image Recognition

- Set up a LibertyNET OCR station.
- Proofread the OCR output using Pop-Up Verify.
- Use drag-and-drop OCR to fill form fields.
- Copy OCR'd text into other documents.
- Define an OCR Zone.
- Use a rule template to perform OCR automatically.
- Configure Image Recognition Optical Mark Recognition (OMR).
- Use Image Recognition for barcode recognition.

### Internal Links

- Create an internal link object.

### Advanced Printing

- Print stamps using Bates numbers on documents.
- Create a Report in LibertyNET.

### Packager

- Setup a package object in LibertyNET to print a package of documents.
- Configure a rule template to print a package.

### Using Log Files and Ini Settings

- Add ini settings to station, user, or liberty ini.
- List 5 types of items saved in the LibertyNET log file.

### Configuring Event Director

- How to log system, user and/or database events.
- Create a document tracking event based on the document GUID.
- Create a custom event for user in a Rule Template.

**Securing Objects**

- Create Security objects.
- Protect objects and documents.
- Implement field based token security.
- Create a sub-administrator for a group.

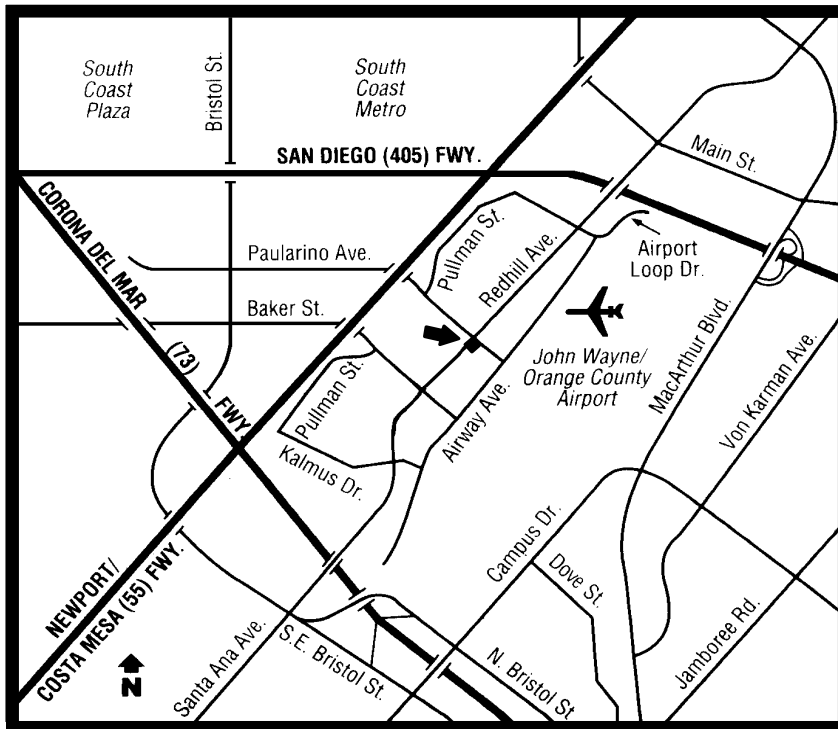
**Scheduled Actions**

- Create a scheduled action to log a user off LibertyNET.
- Create a scheduled action to run a rule template on a folder.

**XML WEB Services**

- Describe the advantages of using a web interface.
- Set up the NETCommunicate Web Server.
- Navigate folders and documents, and perform searches in the web environment.
- Alter the look and feel of the web interface by selecting various stylesheets.
- Use the web controls.
- Create Web Link.
- Create an E-Form.

# Directions to Liberty IMS



## From the Orange County (John Wayne) International Airport

Follow the airport exit signs to Campus Ave. Make a right on Campus Ave. Proceed for approximately one mile. Make a right on North Bristol St. Follow North Bristol St. to Red Hill Ave. Turn right on Red Hill Ave. Follow Red Hill Ave. to Paularino Ave. The Liberty Building will be on the right-hand side at the intersection of Red Hill and Paularino Avenues.

## From the Los Angeles Area (including the LA International Airport - LAX)

Take the San Diego (405) Freeway South and exit on the Bristol Street South off-ramp (about 45 miles south of LAX). Proceed south on Bristol and turn left on Paularino Ave., which is the first intersection past the Red Lion Hotel. Proceed along Paularino until you cross Red Hill Ave. (about one mile). The Liberty Building will be the first complex on your right.

## From the San Diego Area

Take 5 North to the San Diego (405) Freeway North. Pass the orange County Airport and exit on the Bristol Street South off-ramp (about 75 miles north of San Diego). Proceed south on Bristol and turn left on Paularino Ave., which is the first intersection past the Red Lion Hotel. Proceed along Paularino until you cross Red Hill Ave. (about one mile). The Liberty Building will be the first complex on your right.

*AY*  
**AYRES**  
**COUNTRY INN & SUITES**  
COSTA MESA/NEWPORT BEACH



*European Elegance*

## Liberty IMS Corporate Rate

\$125.00\* (Single Occupancy for a Standard Suite, plus applicable taxes)

### ~Complimentary Features~

- ♦ Full Breakfast Buffet ♦ Freshly Baked Cookies, Hors d'oeuvres, & Beverage each evening
- ♦ Award winning Le Chateau Restaurant, offering room service
- ♦ Outdoor Parking ♦ On-site Fitness Facility ♦ Outdoor Heated Pools and Spas

Spacious Deluxe Rooms include private voice mail, Internet access, refrigerator, coffee maker, microwave, iron and ironing board, and hairdryer.

Upgrade to a Junior Suite with Whirlpool tub for an additional \$15.00 per night.

(\* Room rate is subject to availability and can change without notice)

Call our Reservations Department, ask for the "Liberty IMS" rate.  
Also ask about your great Car Package rate with unlimited miles!

714.429.9372 ♦ 800-322-9992

Visit our website: [www.ayrescostamesa.com](http://www.ayrescostamesa.com)

**Ayres Country Inn & Suites ♦ 325 Bristol Street ♦ Costa Mesa, CA 92626**





## Costa Mesa Newport Beach Residence Inn by Marriott

881 West Baker Street  
Costa Mesa, CA  
Phone: 714-241-8800  
Fax: 714-546-4308

### **LIBERTY IMS STUDENTS:**

Residence Inn by Marriott is offering Liberty IMS students \$10 off our corporate rate structure. Please contact the hotel directly to receive your special rate.

We are located just minutes from Orange County John Wayne Airport, California's most beautiful beaches as well as the world famous South Coast Plaza Shopping Resort & Premier Dining. We will gladly provide transportation to these local attractions as well as to Liberty IMS. Our extended stay hotel is fresher, more comfortable and more residential. Each elegant Guest Suite features an oversized living area with pull-out couch and sleeping area, full bath, a fully equipped kitchen, breakfast bar & a well-lit work desk with ergonomic chair. We feature Studios with king size bed and bi-level, loft style Penthouses with fireplace (perfect for 2 trainees to share). Below is a list of the many amenities and services we provide. Additionally, you have 24-hour access to food with our on-property Express Market. [www.costamesaresidenceinn.com](http://www.costamesaresidenceinn.com)

### **Features and Amenities**

- Fully Equipped Kitchens with oven, full size refrigerator, microwave, range, cooking utensils & place settings.
- Complimentary Hot Buffet Breakfast Daily
- Complimentary Evening Social Hour (Mon-Wed)
- Complimentary High-Speed Internet Access
- Complimentary Shuttle service to John Wayne Airport & local area.
- Complimentary Grocery Shopping Service
- Complimentary Parking Near Each Suite
- Complimentary Daily Newspapers
- 24hr Guest Services & Technology Station
- Daily Housekeeping Service
- Valet and Guest Laundry
- Heated Outdoor Swimming Pool & Whirlpool Spa
- Exercise Facilities, Sport Court & BBQ Pavilion
- Family Pets are Welcome, pet walk area
- Executive Meeting Room Facilities
- Japanese breakfast, channel & newspaper



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