

EPHESOFT

Transact Basic Administrator training is intended for new customers and partners to learn the basics of Transact. The Transact Basic Administrator Training provides a broad overview of Transact and system operation. Topics in the course include an overview of the Transact system, the basics of configuring Batch Classification, Extraction, Batch Instance creation and Export.




Training

Prerequisites

Audience

- Access to Transact test environment is recommended
- Intermediate understanding of Regex is recommended
- All Transact Administrators and Professional Services providers

Course Descriptions

Title	Description
Module 01: Transact Overview	<p>This module will introduce you to Context Driven Productivity and how Transact helps boost organizational efficiency. You'll also learn about the six end-to-end document processing stages that Transact follows, the Transact System Architecture, and wrap up with an introduction to the Ephesoft Documentation Site.</p> <p>Labs & Demonstration Videos</p>  <ul style="list-style-type: none"> ● Batch Instance Management Screens Videos ● Transact Demonstration Lab
Module 02: Ingestion	<p>In this module, we will review five document ingestion methods. We will also cover the steps for configuring each method. Then, you will complete the Transact Workflow Lab. This will help prepare you for the upcoming Classification and Extraction course modules.</p>
Module 03: Classification	<p>This module covers the various document classification methods with expanded instruction on Search and Keyword Classification. Configuring the DOCUMENT_ASSEMBLER Plugin and Classification best practices are also discussed.</p> <p>Labs & Demonstration Videos</p>  <ul style="list-style-type: none"> ● DOCUMENT_ASSEMBLER Plugin Simulation ● Search Classification Lab ● Keyword Classification Lab
Module 04: Extraction	<p>Module 04 focuses on configuring Key-Value, Table, and Fuzzy Database Extraction methods as well as Configuring Validation Rules.</p> <p>Labs & Demonstration Videos</p>  <ul style="list-style-type: none"> ● KV Extraction Lab ● Table Extraction Lab ● FuzzyDB Extraction Demonstration Video
Module 05: Export	<p>In this module, we will review some of the Transact export options. We will look at four plugins that are commonly used to export documents and extracted metadata to external storehouses after all workflow operations are complete.</p>