



ASSURX ACADEMY **TRAINING COURSE CATALOG**

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AssurX offers a variety of courses to meet all of your training needs. In addition, our Professional Services team can custom tailor a course or courses for your organization. Training formats include:

▶ **ONSITE TRAINING**

AssurX trainers will come onsite to your location. There is no limit to the number of people who can participate in this training. However, due to the time required for participants to finish the hands-on exercises, we recommend a maximum of 10 students per session.

▶ **VIRTUAL CLASSROOM TRAINING**

This training is performed remotely via Microsoft Teams™ or Citrix GoToMeeting™ and is meant for no more than two (2) students per session. You still get a real-life trainer and will go over the same material as in person with the same exercises. However, due to the nature of this type of training, the length of time may vary. The instructor will cover the material at the pace the students allow, which often is faster than in a physical classroom.

The durations of courses listed below are “up to” the time indicated.

▶ **ASSURX HOSTED TRAINING**

AssurX can host your training at facilities located in Detroit, MI or Reno, NV. A minimum of five (5) people are required to host a class.

▶ **ONLINE SELF-PACED TRAINING***

Self-Paced training enables your students to learn based on their own schedules and at their own pace.

STANDARD COURSE OFFERINGS

Course Title	Duration*	Available as Self-Paced
Introduction to the AssurX Platform**		✓
AssurX System Administration	1 Day	✓
AssurX Basic Configuration	3 Days	✓
AssurX Intermediate Configuration	5 Days	✓
Abbreviated Basic and Intermediate Configuration	5 Days	
AssurX Advanced Configuration and Automation	3 Days	
Crystal Reports® Development	4 Hours	
SQL with AssurX	4 Hours	
System Integration	1 Day	
Using JavaScript and CSS in AssurX	4 Hours	
Database Optimization for Performance	4 Hours	
Data Imports	1 Day	
Solution Course: Document Management		✓
Solution Course: Training Management		✓

*Duration may vary for Virtual Classroom sessions and Online Self-Paced Training.

**Available as Self-Paced Training only

STANDARD COURSE DESCRIPTIONS

▶ **INTRODUCTION TO THE ASSURX PLATFORM (SELF-PACED)**

The Introduction to the AssurX Platform will provide users with a general overview of the AssurX software platform.

Course Topics

- General Site Navigation
- User Preferences
- Home Page Dashboards
- Menus and Toolbars
- Queries and Advanced Searches
- Adding, Editing and Closing Records
- Reassigning Records
- Adding Electronic Signatures
- Assigning Proxies

▶ **ASSURX SYSTEM ADMINISTRATION**

The System Administration course will provide you with the information you need to manage and administer your AssurX system. Everything from employee and password management to security and data management.

Course Topics

- Global Password Management
- Employee Management
- Single Sign-On (SSO)
- System Timeouts
- Session Duration
- Broadcast Messaging
- System Hierarchy
- Security
- List Management
- Full Text Search Management
- Records Management
- Importing data

▶ ASSURX BASIC CONFIGURATION

The Basic Configuration course will introduce you to the framework for development within the AssurX platform. This course is meant for individuals who are new to the AssurX platform and who will be performing simple configuration and maintenance of existing solutions. After completing this course, you will be able to build your own forms, workflows, basic display parts and dashboards.

Course Topics

- Common Configuration Elements
- Naming Conventions
- Managing Forms/Categories
- Managing Fields
- Use of the Form Builder
- Creating Basic and Intelligent Lists
- Signature Controls
- Graphical Display Parts and Dashboards
- Basic Escalation Rules
- Use of the Workflow Builder

▶ ASSURX INTERMEDIATE CONFIGURATION

The Intermediate Configuration course builds upon the skills acquired during the Basic Course. Learn how to apply business logic to your forms to hide/display fields and automatically modify other properties; concepts for making fields conditionally mandatory; creating your own relationships between forms, and advanced uses of data display parts to show related data.

Course Topics

- Adding Business Logic to Forms
- Using Buttons to add a Form
- Advanced Display Parts
- Advanced Rules
- Advanced Intelligent Lists
- Adding Parameters to Display Parts
- Advanced Security

▶ ABBREVIATED BASIC AND INTERMEDIATE CONFIGURATION

This course is designed for people who can only devote 5 days to learning as much as they can about configuration. Everything in both the Basic and Intermediate courses will still be covered. Some topics may not be explored as in-depth as in the individual courses, and the users will not be creating their own business solution. Instead, students will receive the functional design specification to take with them to complete later.

▶ **ADVANCED CONFIGURATION AND AUTOMATION**

This course will teach the most advanced techniques available for performing configuration and setting up automation within your system. When the course is completed, users will be able to create dynamic workflows along with introducing a high level of automation into your solutions.

The last two days of this course are dedicated to building a real AssurX solution using all of the techniques learned in both the Basic and Intermediate courses. The instructor will provide a functional design specification and will help walk you through what it takes to build your own working business solution.

Course Topics

- Signature Reject Loops
- Creating Records
- Updating Records
- Advanced Emails
- Creating Lookup Tables and Cross-reference Tables
- Creating Word Documents
- Advanced Full Text Searches
- Complete System Exports with File Attachments
- Export Files of Data

▶ **CRYSTAL REPORTS DEVELOPMENT**

Crystal Reports is the reporting tool that comes integrated with the AssurX platform. Students will learn how to create and modify reports, usage of sub-reports, creating calculated fields, and the basics of report design.

Course Topics

- Connecting to your Database
- Adding Captions and Fields
- Creating Calculated Fields
- Adding Input Parameters
- Creating Sub-reports
- Publish a Report

▶ **USING SQL WITH ASSURX**

Learn how SQL is used with the AssurX system. This course will go over the basics of SQL as well as how it is used by the system. Students will also learn about the table structure within the database and how each is constructed in order to find the data you need.

Course Topics

- Basic SQL Syntax
- Use of Table Joins
- AssurX Database Structure
- Best Practices

▶ SYSTEM INTEGRATION

This course covers integration with external systems, regardless of the name of the system. As long as there is either the ability to directly or indirectly connect to its database or use a web service, the AssurX platform can integrate with that system. Students will learn how to set up and manage the links to these systems as well as tricks for being able to see what is available in an external database table.

Course Topics

- Using SQL with an External System
- Pulling Data from an External System
- Sending data from AssurX
- Using the AssurX Web Service
- Calling an External System's Web Service
- Salesforce.com Connectors

▶ USING JAVASCRIPT AND CSS IN ASSURX

Learn how your own JavaScript can be used within the AssurX system to perform all types of functionality.

Course Topics

- JQuery
- How to insert JavaScript
- Use of Cascading Style Sheets
- Use of styling script elements

▶ DATABASE OPTIMIZATION FOR PERFORMANCE

This course covers the use of the database and how to ensure that it is giving the best performance. Due to the dynamic nature of the AssurX platform, we are not able to predefine all of the necessary performance tuning elements needed to optimize your system. After taking this course, you will have a basic understanding of database tuning.

Course Topics

- Indexes
- Statistics
- Views
- Stored Procedures

▶ DATA IMPORTS

This course covers the two different utilities AssurX offers for importing data. Users will likely encounter times when you want to mass enter data, whether importing new Employees or importing new records and files or mass editing records. After taking this course, users will be able to set up and maintain your own import jobs and import files.

Course Topics

- Importing with Excel
- Importing File Attachments
- Updating Records with Excel
- Mass Import of Large Amounts of Records
- Import Employee Records
- Import Lists

SOLUTION COURSES

▶ DOCUMENT MANAGEMENT (SELF-PACED ONLY)

The Document Management Course provides guidance on using the AssurX out-of-the-box solution for Document Management. Learn how to utilize the solution to manage all your documentation throughout the entire life cycle, from the initial revision, through collaboration, final approval, release, superseding, and obsolescing. Learn how to use collaboration tools to ensure that every member of your team has the chance to review and add to the document prior to release, and learn how Document Management can be used to provide the documents your users need for all job functions.

Course Topics

- Document Types
- Defining and Using Document Security
- The Document Team
- Record Masters for Simple Documents
- Document Masters for Documents Requiring Approval
- Using the Workbench for Collaboration
- Releasing Documents and Making them Effective
- Document Change Requests
- Document Groups with Advanced Document Security
- Document Management with Configuration Options

SOLUTION COURSES

▶ TRAINING MANAGEMENT (SELF-PACED ONLY)

The Training Management Course provides guidance on using our Out-of-the-box solutions for Training Management. The AssurX Training Management solution is a fully functional management tool maintaining both Document and Course-based training. While the solution can be implemented without the AssurX Document Management Solution, it has been tightly integrated with it.

Course Topics

- System Configuration for Document and Course Based Training
- Navigating the Training Management and Personal Training Dashboards
- Creating Employee Masters to Manage and Track Certifications, Training Requirements and History
- Creating Training Requirements for Assignment of Training
- Creating Courses and Sessions
- Creating and Assigning Exams
- Enrolling in Courses
- Signing Training Tasks

To request training or additional information, contact your AssurX Account Manager or [click here](#).