DOCUMENT MANAGEMENT

Last modification: March 25, 2025

Lesson Plan - September 16, 2021

At the end of the *Document Management* lesson, the customer and targeted users will be able to save documents in **maestro***, search for them, sort and make them available to the appropriate users, share them with clients if needed, and, finally, use variables to merge data in *Word* and/or *Excel* documents.

Unit DOC01 - Preliminary Analysis

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience

The objective of this lesson is to clarify the needs and requirements for document management in **maestro***, as well as perform the necessary configurations.
 	
PREREQUISITES
 	
• *Security.*
• *Outlook Add-in*
	• Analysis
	• Configurations
	  • Define Groups
	  • Define Document Categories
	  • *Outlook* Add-in
	  • Security Management
		• Discussion on the current and future process of managing documents (strengths and weaknesses);
		• Set up of the required configurations for the implementation;
		• Decision-making.
		
		HOMEWORK
		
		• *Reflect on the discussions.*
			15 min	• Training document DOC01[1]	Pilot

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[1]This training document is under development.

maestro technologies

Unit DOC02 - Document Management 101

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will be able to perform various types of operations linked to the saving, sharing, and use of documents in **maestro***.	• Document Management • Merging of variables in *Word* and/or *Excel* documents • Collection Follow-up • Events Calendar • Document Inquiry • Documents Import • Mailing Configuration	• Different types of documents; • Using keywords; • Search tags; • Including documents in massive mailings or not; • Assigning a document to a user; • Demonstration of a fusion with a *Word* document; • Transfer of an *Outlook* document to **maestro*** (Add-in); • Creating documents to follow-up on collections; • Using the Events Calendar; • Document search (document inquiry); • Using the mailing configurations to save documents.	2h	• Training document DOC02[1] • How to - MS Word Merge from the **Document Management** Module • How to - Using Keywords to Facilitate Searching for Documents	Pilot Users

[1]This training document is under development.

Unit DOC03 - Tests and Validation

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will have carried out the tests and verifications which allow to use the **Document Management** option, in **maestro***, in accordance with the company's needs.	• Tests of security access to the different document categories • Tests linked to variable mergers • Creation and import of documents	• Review of previous concepts and validation of completed tasks as homework; • Test Assistance; • Transaction Validations. *HOMEWORK* • *Complete Integrated Tests.*	0.5h		Pilot Users

Unit DOC04 - Conclusion

Date: Time: Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to manage documents in **maestro***.	• Review of past notions and homeworks • User training according to the established process during the analysis • Finalization of the creation of document categories and their configurations • Finalization of the application of security settings for document category access	• Validate learnings; • Review of the security settings applied; • Preparation of the next training lessons.		Acquired competencies Form - DOC[I]	Pilot

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[I]This training document is under development.