

## Content Manager Administration Fundamentals (CMAF)

ID CMAF Price 2,400.— €(excl. tax) Duration 3 days

### Important notes for the booking of Open Text trainings

Please note that prepayment is required for participation in an Open Text training course. Participation in a training course is possible for 12 months after booking the course. Cancellations are excluded. For further information, please refer to **our** [General Terms and Conditions](#).

### Course Overview

This three-day Administrator-level course teaches students how to set up and configure OpenText™ Content Manager for Enterprise use.

In this course, you will learn about security and locations. You will create retention schedules and holds, and set up classifications/categories. You will learn about record types, action tracking, system options, and troubleshooting tips. You will also perform audit configuration and auto-classification. Finally, you will learn about advanced disposal, client-matter functionality, and the export and import functionalities (DataPort). During this course, you will listen to lectures, participate in guided demonstrations, and complete a series of hands-on labs.

Highlights:

- Describing new features and enhancements.
- Working with security and locations.
- Setting up retention schedules and holds.
- Using the thesaurus for classifications/categories.
- Creating actions/procedures and document stores.
- Using indexing and setting up auto-classification.
- Enabling auditing and setting up disposal workflow.
- Creating imports and exports.
- Working with Client and Matter records, and following troubleshooting tips.

### Who should attend

The audience includes, but is not limited to: Content Managers, Records Coordinators, Administrators, senior business staff, power

users, Inquiry Users, and/or core project team members.

### Prerequisites

To be successful in this course, you should have the following prerequisite skills or knowledge:

- Successful completion of Content Manager User Fundamentals (CMUF) or equivalent experience (must have used Content Manager and/or Records Manager in a professional environment for 6 months or more)
- Knowledge of Content Manager and/or Records Management principles and internal business processes
- Basic knowledge of and comfort working with software; including simple keyboard and mouse skills, as well as knowledge of Web Browsers (Internet Explorer or Chrome) and other Windows-based programs.

### Course Objectives

On completion of this course, you should be able to:

- Set up Content Manager security.
- Set up Content Manager locations.
- Create and maintain retention schedules and holds.
- Set up additional fields.
- Use structured titling options.
- Create and maintain a classification system (a record plan).
- Define record types.
- Use action tracking.
- Describe Content Manager indexing.
- Perform and configure Content Manager administrative options.
- Create a document store.
- Set up auto-classification.
- Set up audit configuration options.
- Use Client-Matter functionality.
- Use the import and export options.
- Set up a disposal workflow.
- Review general troubleshooting, tips, and maintenance.

### Course Content

- Module 1: Course Overview
- Module 2: New Features and Enhancements
- Module 3: Security
- Module 4: Locations
- Module 5: Retention Schedules and Holds
- Module 6: Additional Fields
- Module 7: Structured Titling Options
- Module 8: Record Types
- Module 9: Action Tracking
- Module 10: Content Manager Indexing
- Module 11: System Administration Options
- Module 12: Document Store
- Module 13: Auto-Classification
- Module 14: Audit Configuration Options
- Module 15: Import and Export (Dataport)
- Module 16: Disposal Workflow
- Module 17: Client and Matter Functionality
- Module 18: General Troubleshooting, Tips, and Maintenance

## Detailed Course Outline

### Module 1: Course Overview

- Identify the course objectives.
- View the course schedule and logistics.
- View eBooks in different ways.
- Access lab environment details and instructions.

### Module 2: New Features and Enhancements

- Identify new features and enhancements in Content Manager 23.4.

### Module 3: Security

- Access the security levels/classifications.
- Access security caveats/supplemental markings.
- Describe the new default terminology.
- Create security levels/classifications.
- Create security caveats/supplemental markings.
- Delete security levels/classifications and caveats/supplemental markings.
- Apply security levels/classifications and caveats/supplemental markings.
- Explain Additional information – Security.
- Access and apply access controls.
- Apply access controls – Locations.
- Apply access controls – Record types.
- View access rights.
- Explain Additional Information – Access Control.

### Module 4: Locations

- Access the locations.
- Describe types of locations – icons.
- Create a location.
- Explain the differences with location types.
- Manage and delete locations.

### Module 5: Retention Schedules and Holds

- Access the retention schedules.
- Create retention schedules.
- Delete retention schedules.
- Recalculate triggers in retention schedules.
- Move retention schedules.
- Re-index retention schedules.
- Use retention schedules with records.
- Access holds.
- Create a hold.
- Use a hold.
- Perform event-based archiving

### Module 6: Additional Fields

- Access the additional fields.
- Explain the new default terminology.
- Create additional fields.
- Apply additional fields.
- Create managed lookup sets.

### Module 7: Structured Titling Options

- Access the classifications/categories.
- Access the thesaurus.
- Describe the new default terminology.
- Review the Numbering Pattern Character Options chart.
- Create a classification.
- Explore the Additional Information – Other tabs.
- Create a new thesaurus term.
- Establish thesaurus term relationships.
- Describe additional information.

### Module 8: Record Types

- Access the record types.
- Describe the new default terminology.
- Explore the properties of record types.

### Module 9: Action Tracking

- Access the actions/procedures.
- Create actions/procedures.
- Delete actions/procedures.
- Link actions/procedures.
- Show actions/procedures.
- Reassign or complete actions/procedures.

- Compare actions/procedures to workflow.

## **Module 10: Content Manager Indexing**

- Describe Content Manager indexing.
- Describe Elasticsearch integration.
- Create Elasticsearch indexing.
- Create IDOL indexing.

## **Module 11: System Administration Options**

- Name the system administration options.
- Describe the effect of each option on the behavior of a Content Manager database.
- Describe the Metadata Validation rule.

## **Module 12: Document Store**

- Describe the document stores.
- Create a document store.
- Describe a document store with security compliance.
- Enable hash checking.
- Describe Cloud storage support.

## **Module 13: Auto-Classification**

- Set up auto-classification.
- Run auto-classification.
- Review auto-classification.

## **Module 14: Audit Configuration Options**

- Enable auditing on a dataset.
- Access audit logging options.
- Use the Content Manager Audit Options tabs.
- View active events.
- View audit log files.

## **Module 15: Import and Export (Dataport)**

- Access DataPort.
- Create imports and exports.
- Use the DataPort project menus.
- Access the DataPort interface sections.

## **Module 16: Disposal Workflow**

- Describe disposal work flow.
- Create destroy consignment.
- Review destroy consignment.
- Approve/reject consignment.

## **Module 17: Client and Matter Functionality**

- Summarize the Clients and Matters legal structure.
- Set up Client and Matter functionality.
- Work with Client and Matter records.

## **Module 18: General Troubleshooting, Tips, and Maintenance**

- Describe audit logs.
- Describe log directories.
- Explore unknown locations.
- Describe group locations.
- Describe reindex and recalculate triggers.

# About Fast Lane



Fast Lane is a global, award-winning specialist in technology and business training as well as consulting services for digital transformation. As the only global partner of the three cloud hyperscalers- Microsoft, AWS and Google- and partner of 30 other leading IT vendors, Fast Lane offers qualification solutions and professional services that can be scaled as needed. More than 4,000 experienced Fast Lane professionals train and advise customers in organizations of all sizes in 90 countries worldwide in the areas of cloud, artificial intelligence, cyber security, software development, wireless and mobility, modern workplace, as well as management and leadership skills, IT and project management.

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