

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.

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