

Content Manager Installation Essentials (CMIE)

ID CMIE Price 1,600.— €(excl. tax) Duration 2 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 two-day administrator-level course covers the installation of OpenText™ Content Manager (CM) for Enterprise. It discusses the installation preparation and process of CM, Enterprise Studio configuration, dataset restoration and upgrade, IDOL Indexing, content rendering, the Web Client, and additional workgroup server configuration and maintenance. The course equips designated CM administrators with the skills necessary to plan and design a system to meet their enterprise needs. During this course, you will listen to lectures, participate in guided demonstrations, and complete a series of hands-on labs.

Highlights:

- Describing the role of a CM administrator in an organization.
- Setting up and/or maintaining CM software as a working system.
- Planning and designing a system to meet your enterprise needs.

Who should attend

This course is intended for those users who are responsible for the setup and initial design of Content Manager. This includes, but is not limited to: Records Managers, senior business staff, power 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 Administration Essentials course or
- equivalent experience (must have used CM and/or Records Manager in a professional environment for 6 months] or more).
- Knowledge of content management principles and internal business processes
- Basic knowledge of Windows Server operating system and management.

Course Objectives

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

- Describe the CM application.
- Apply architecture design and considerations.
- Install, configure, and maintain CM software: locations, security, record types, and classifications.
- Upgrade an earlier version CM dataset.
- Perform ongoing management and troubleshooting.
- Install and configure IDOL Indexing.
- Render content using the Blazon Enterprise Server.
- Use CM administrative tools.

Course Content

Module 1: Course Overview

- Identify the course objectives.
- View the course schedule and logistics.
- View eBooks in different ways.

Module 2: Architecture Overview

- Describe the CM multi-tier architecture.
- Describe the repository structure.
- List and describe each of the CM clients.
- Describe the CM Service API.
- Describe the various architecture scenarios.

Module 3: Architecture Scenarios

- Describe the architecture scenario for small organizations.
- Describe the architecture scenario for regional, country, and international organizations.
- Describe the architecture scenario for multiple event servers.

Module 4: Pre-Installation and Installing the Core with Basic Options

- Create and add the Service account.
- Configure the shares and security for the required CM working directories.
- Add the Service account and create the databases in SQL.
- Install the CM core with basic options.
- Verify service status and test the basic functionality.

Module 5: Configuring Enterprise Studio

- Describe the function of the CM Enterprise Studio.
- Explore the GUI for Enterprise Studio.
- Describe the configuration and format of the configuration file.

Module 6: Testing the Client

- Start the client and set the default dataset.
- Add a record to CM.
- Verify that the record has been added to CM.

Module 7: Indexing IDOL and Configuring Events

- Index the IDOL database.
- Configure and enable Event Services.

Module 8: Restoring and Upgrading a Dataset

- Restore a database.
- Update the service account for the restored database.
- Register and upgrade a dataset.
- Repair the dataset schema.
- Configure events for the restored dataset.

Module 9: Installing the Web Client, Service API, and WebDrawer

- Install the Web client, the Service API, and WebDrawer.
- Test the Web client from another machine.
- Understand CM Web Client for multi-tenancy.
- Review Mobile App functionality.

Module 10: Adding Additional Workgroup Servers

- Add Additional Workgroup servers.
- Configure additional Workgroup servers for event processing.

Module 11: Content Rendering

- Verify Content Rendering functions and options for the new OpenText™ Blazon Enterprise Server.
- Render content.

Module 12: Scripted Client Installation

- Create a Scripted Client installation.
- Modify a Scripted Client installation.
- Deploy a Scripted Client installation.
- Describe Cloud storage support.

Module 13: Storage Management

- Enable Workgroup caching.
- Configure Workgroup caching options.
- Explain tiered storage, encryption, and document compression.

Module 14: Maintenance Considerations

- Define maintenance considerations.
- Integrate with Enterprise Backup.

Module 15: Content Manager Thin Integration with MS Office

- Install the CM Thin Office Integration.
- Explain the Thin Office integration options.
- Check MS Office documents into CM.
- Open CM records in MS Office using Thin Integration.
- Finalize a record using Thin Integration.
- Create CM records based on a MS Office template registered in CM.

Module 16: Installing Additional IDOL Components

- Define OEM and Enterprise IDOL.
- Describe the IDOL components.
- Manually install the additional CM IDOL content services.
- Describe the CM IDOL Image Server.

Module 17: Maintaining an IDOL Index

- Check the IDOL index for errors.
- Optimize the IDOL index.
- Monitor an IDOL server.
- Remove a Document Content Index.

- Delete an IDOL database.
- Suppress Document Content Indexing.

Module 18: Upgrading from Records Manager

- Describe the steps of an On Top CM upgrade.
- Describe the steps of a new infrastructure CM upgrade.
- Work in a mixed environment.
- Upgrade Client computers.

Module 19: Basic Troubleshooting

- Find the various CM log files.
- Enable the logging option.
- Perform basic troubleshooting."

About Fast Lane



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