

Content Manager User Fundamentals (CMUF)

ID CMUF Price 1,600.— €(excl. tax) Duration 2 days

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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 course about Content Manager teaches students to use advanced features of Content Manager.

This course is for business users who are responsible for the day-to-day operations of an organization and who might have elevated responsibility in the Content Manager tool. You will learn how to use different Content Manager clients, view records and metadata, create and edit records, search for records and save searches, use document queues, work with revisions, and check documents out to edit them and check them back into Content Manager.

The course uses lectures and a series of hands-on labs to present the course material.

Highlights:

- Explaining Enterprise Content Management.
- Getting familiar with the three different Content Manager clients.
- Searching for records using a simple search or an advanced search (Boolean, multi-field, or string search).
- Creating records using three different methods.
- Setting up custom validation rules.
- Viewing document records.
- Creating, saving, and using saved searches.
- Checking out documents for editing and checking them back in.
- Previewing documents and renditions.
- Editing documents using native applications and the Microsoft Office and O365 integration.
- Creating and processing document queues.

Who should attend

The audience includes, but is not limited to: Content Managers, Records Coordinators, 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:

- Knowledge of 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 Microsoft Office and other Windows-based programs.
- While there will be some technical discussion throughout the course, a strong technical aptitude or background is not required.

Course Objectives

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

- Describe the ECM and the purpose of Content Manager.
- Provide an overview the Content Manager interfaces.
- Use the Search functionality in Content Manager.
- Create records within Content Manager.
- Work with records within Content Manager.
- Edit records and perform document management within Content Manager.
- Work with document queues.
- Provide an overview the Content Manager-MS Outlook integration.
- Use alerts and user labels.
- Explore user customization.
- Work with Office 365 Integration
- Work with the Web client.

Course Content

- Module 1: Course Overview
- Module 2: ECM and Purpose of Content Manager
- Module 3: Overview of the Content Manager Interfaces
- Module 4: Search Functionality in Content Manager
- Module 5: Creating Records
- Module 6: Working with Records in Content Manager
- Module 7: Editing Records (Document Management)
- Module 8: Working with Document Queues
- Module 9: Content Manager Integration with Microsoft Outlook
- Module 10: Working with Alerts, User Labels, and Records
- Module 11: Customizing User Options in Content Manager
- Module 12: Working with Content Manager Web Client

Detailed Course Outline

Module 1: Course Overview

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

Module 2: ECM and Purpose of Content Manager

- Explain the concept of Enterprise Content Management (ECM).
- Describe the differences between records and documents.
- Describe the Three Zone Approach to records and information.
- Explain the difference between records management and document management.
- Substantiate how Content Manager (CM) helps a corporation comply with retention and other rules.

Module 3: Overview of the Content Manager Interfaces

- Navigate the full Content Manager (CM) desktop interface.
- Navigate the CM Desktop Client.
- Navigate the CM Web Client.
- Navigate the CM WebDrawer.

Module 4: Search Functionality in Content Manager

- Use various full search methods and options.
- Create simple and advanced searches.
- Refine the search result, count search results, and save searches.
- Use the Boolean, multi-field, and string-based Search Editors.
- Use Content Search.

Module 5: Creating Records

- Create metadata-only and electronic document records.
- Use the registration form.
- Work with offline records.
- Search for records.

Module 6: Working with Records in Content Manager

- Create metadata-only and electronic document records.
- Use the registration form.
- Work with offline records.
- Search for records.

Module 7: Editing Records (Document Management)

- Edit electronic documents through Content Manager (CM) and their native applications.
- Summarize the differences between View, Check Out, and Edit.
- Articulate the differences between record revisions and record versions.

Module 8: Working with Document Queues

- Define document queues.
- Create and use a document queue within Content Manager (CM).
- Describe automatic queue processing.
- Summarize the practical applications for document queues.

Module 9: Content Manager Integration with Microsoft Outlook

- Review the interface of the Content Manager integration with Microsoft (MS) Outlook.
- Check email into Content Manager from Outlook .
- Associate check-in styles with linked folders.
- Choose the appropriate cleanup option for emails.
- Send email and attachments from Content Manager using the Outlook email form or the CM email form.

Module 10: Working with Alerts, User Labels, and Records

- Define alerts.
- Summarize the uses for alerts.
- Create and configure alerts.
- Define user labels and their usage.
- Create and apply user labels and leveling.
- Create a To Do item.
- Complete a To Do task.
- Generate Web pages.
- Generate a Print Merge report.
- Generate a Record Statistics report.

Module 11: Customizing User Options in Content Manager

- Customize the Content Manager options.
- Create a Dropzone view.
- Customize the Quick Access toolbar.
- Customize the ribbon.

Module 12: Working with Content Manager Web Client

- Perform Searches and Navigate Records
- Get familiar with the Web Client interface, its menu, tabs, and panes.
- Identify the document type icons change.
- Perform a Quick Search history and scroll the search history.
- Perform a Form Search and an Advanced Search using the Web Client
- View search results in a Grid View.
- Save a search.
- Navigate the structure of a record.
- Create, view, and edit records.
- Work with Office 365 Integration
- Generate Reports and Edit Settings
- Create a report.
- Customize the Record Property settings.
- Define and use Metadata (Field) validation.
- Check out Web-based Microsoft Office documents to OneDrive, edit them, and check them back into Content Manager..
- View, promote, and delete revisions.

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