Szkolenie: Micro Focus
CM110 - Content Manager Advanced User Training

Cel szkolenia:

This one-day, *user-level* course addresses all the core functionality and features of Content Manager. This includes searching for, creating, and maintaining records. Other components, such as Reports, Activities and Actions, Alerts, User Labels, Dropzone and User Options are also discussed.

Class sizes are limited to 12 participants to provide adequate individual attention under the guidance of expert Micro Focus Software Education trainers. During this course, learners participate in guided demonstrations followed by self-completed exercises. It is important to complete all demonstrations and exercises because the course builds upon itself.

Upon successful completion of this course, you should be able to:

- Describe the ECM and Purpose of Content Manager
- Overview the Content Manager interfaces
- Use the Search functionality
- Create records within Content Manager
- Work with records within Content Manager
- Perform document management within Content Manager
- Work with document queues
- Overview the Content Manager-MS Outlook integration
- Use alerts and user labels
- Explore user customization
- Work with the Web client

Audience/Job Roles

This course is intended for senior-level users who are responsible for the day-to-day operations of an organization and who might have elevated responsibility in the Content Manager tool, including, but not limited to, Content Managers, Records Coordinators, senior business staff, Power Users, Inquiry Users, and/or core project team members.

Plan szkolenia:

- Course Overview

- Identify the contents and objectives of the course
- Define the class schedule and class logistics
- Identify the related courses
- Discuss the lab environment details

- ECM and Purpose of Content Manager
  - This module enables you to identify the purpose and benefits of Content Manager.
  - Explain the concept of Enterprise Content Management
  - 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 helps a corporation comply with retention and other rules

- Overview of the Content Manager Interfaces
  - This module helps you get familiar with the Content Manager Interface.
  - Navigate the full Content Manager desktop interface
  - Navigate the Content Manager Desktop client
  - Navigate the Content Manager Web Client
  - Navigate the Content Manager WebDrawer

- Search Functionality in Content Manager
  - This module enables you to use the Search functionality
  - 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

- Creating Records
  - This module enables you to use the create records in Content Manager
  - Create metadata-only and electronic document records
  - Use the registration form
  - Work with offline records
  - Use searching knowledge (when applicable)

- Working with Records
  - This module helps you to use records in Content Manager
  - Explain the Document Properties Dialog
  - Describe the Records Shortcut Menu (Record Right Click options)
  - View a Document Record
  - Use Saved Searches

- Create User Notes
- Describe Offline Records

- Editing Records (Document Management)
    - This module enables you to edit records in Content Manager
    - Edit electronic documents through Content Manager and their native applications
    - Summarize the differences between View, Check Out, and Edit
    - Articulate the differences between record revisions and record versions
    - Finalize a document

- Working with Document Queues
    - This module helps you to define and use document queues.
    - Define document queues
    - Create and use a document queue within Content Manager
    - Describe automatic queue processing
    - Summarize the practical applications for document queues

- Content Manager Integration with MS Outlook
    - This module gives you an overview of the features of the Content Manager integration with MS Outlook
    - Integrate Microsoft (MS) outlook Integration
    - Use various methods to register an item into Content Manager from MS Outlook (Check-In Style and by selecting record type)
    - Perform Check-In Style Email Clean-Up Option
    - Use Send Email From Content Manager

- Working with Alerts and User Labels
    - This module helps you use alerts and user labels more efficiently.
    - 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

- User Customization
    - This module describes the user customization and enables you to work with the features.
    - Customize Content Manager options
    - Create Dropzone view
    - Customize Quick Access toolbar
    - Customize the ribbon

- Web Client
  - This module enables you to work with the Web Client.
  - Explain the working with Web Client
  - Identify Quick Search History and Scrolling Save searches
  - Describe the Tabs in Interface
  - Identify the Document Type Icons Change
  - Explain the Search in Web Client
  - Describe the Saved Search
  - Create and navigate records
  - View and edit records
  - Use the reporting features
  - Identify the Hierarchical View of Folders
  - Explain the Record Property Settings
  - Identify the Metadata (Field) Validation
  - Identify the Improved Selection of Jurisdiction
  - Identify the Improved Selection of Lookup Sets
  - Describe the Web-based Editing of Office Documents
  - Explain the Revision Support for Viewed, Promoted and Deleted

Wymagania:

To be successful in this course, you should have the following prerequisites 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 MS 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.

Poziom trudności

Certyfikaty:

The participants will obtain certificates signed by Micro Focus (course completion).

This course prepares you also for such related Micro Focus certification exam: CM110-93: Advance User Certification EXAM.

Prowadzący:

Authorized Micro Focus Trainer.