

## Training: Micro Focus CM200 - Content Manager Administration Essentials



### TRAINING GOALS:

This 3-day Administrator Level course covers the setup and configuration of Content Manager for Enterprise use. It discusses Security, Locations, Retention, Schedules and Holds, Classifications/Categories, Record Types, Action Tracking, System Options, Troubleshooting Tips, Audit Configuration, Auto Classification, Advance Disposal, Client Matter Functionality and Export and Import functionalities (DataPort).

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

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

- Set up Content Manager security
- Set up Content Manager locations
- Set up additional fields
- Create and maintain retention schedules and holds
- Create and maintain a classification system (that is, a record plan)
- Define record types
- Perform and configure Content Manager administrative options
- Enable Auditing on dataset
- Perform General Troubleshoot and Maintenance
- Create and Use Documents Store
- Use Export and Import function (DataPort).
- Configure Auto Classification
- Configure Advanced Disposal

### Audience/Job Roles

- Target Audience: Records Managers, Administrator and Records Coordinators
- This course is intended for those users who are responsible for the setup and initial design of Content Manager; including, but not limited to: Senior Business Staff, Power Users, and/or Core Project Team Members.

## CONSPECT:

- Overview
  - Define Course Objective
  - Introduction
  - Course Logistics and Overview
  - Course Agenda
  - My Room Overview
- Security
  - Accessing Security Levels/Classifications
  - Accessing Security Caveats/Supplemental Markings
  - Describe New Default Terminology
  - Creating Security Levels/Classifications
  - Creating Security Caveats/Supplemental Markings
  - Deleting Security Levels/Classifications and Caveats/Supplemental Markings
  - Applying Security Levels/Classifications and Caveats/Supplemental Markings
  - Explaining Additional Information – Security
  - Accessing and Applying Access Controls
  - Applying Group Access Controls – For Locations
  - Applying Group Access Controls – Record Types
  - Viewing Access Rights
  - Explaining Additional Information – Access Controls
- Locations
  - Accessing Locations
  - Types of Locations – Icons
  - Creating a Location
  - Differences in Location Types
  - Managing and Deleting Locations
  - Deactivating and Reactivating Locations
- Retention Schedules and Holds
  - Accessing Retention Schedules
  - Creating Retention Schedules
  - Deleting Retention Schedules
  - Recalculating Triggers in Retention Schedules
  - Moving Retention Schedules
  - Re-indexing Retention Schedules

- Using Retention Schedules with Records
- Accessing Holds
- Creating a Hold
- Using a Hold
- Additional Fields
  - Accessing Additional Fields
  - Explaining the New Default Terminology
  - Creating Additional Fields
  - Applying Additional Fields
  - Creating Managed Lookup Sets
- Structured Titling Options
  - Accessing Classifications/Categories
  - Accessing Thesaurus Terms
  - Describing the New Default Terminology - Classification Only
  - Reviewing the Numbering Pattern Character Options Chart
  - Creating a Classification
  - Exploring the Additional Information - Other Tabs
  - Creating a New Thesaurus Term
  - Establishing Thesaurus Term Relationships
  - Describing the Additional information
- Record Types
  - Define record types
  - Create record types and record entry forms
  - Establish access control on record type objects
- Action Tracking
  - Accessing Actions/Procedures
  - Creating Actions/Procedures
  - Deleting Actions/Procedures
  - Linking Actions/Procedures
  - Showing Actions/Procedures
  - Reassigning or Completing Actions/Procedures
  - Comparing Actions/Procedures to Workflow
- Content Indexing
  - New Content Indexing features
  - Introduction Elasticsearch indexing
  - Setting up Elasticsearch indexing

- Setting up IDOL Indexing
- System Administration Options
  - Name system administration options
  - Describe the effect of each option on behavior of a CM database
- Document Store
  - Creating Document Stores
  - Using Document Stores
  - Configuring the usage details
  - Transferring Documents between stores
  - Modifying Document Stores
  - Removing document Stores
  - Performing integrity check on Document Stores
- Auto Classification
  - Setting up CM for Auto Classification
  - Running Auto-classification
  - Reviewing Auto-classification
- Audit Configuration Options
  - Enabling Auditing on a Dataset
  - Accessing Audit Logging Options
  - Using CM Audit Options Tabs
  - Viewing Active Events
  - Viewing Audit Log Files
- Import/Export (DataPort)
  - Accessing DataPort
  - Creating Imports and Exports
  - Using the DataPort Project Menus
  - Accessing the DataPort Interface Sections
    - The General Section
    - The Settings Section
    - The Default Dates Section
    - The Default Locations Section
    - The Field Map Section
    - The Export Properties Section
- Advanced Disposal Of Records
  - Creating Consignments
  - Archivist Review Function

- Consignment Approval Functions
- Dispose
- Client/Matter functionality
  - Describe the requirements for using Client and Matter records
  - Create a Client record
  - Create a Matter record
- General Troubleshooting & Tips & Maintenance
  - General Troubleshooting & Tips & Maintenance

## REQUIREMENTS:

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

- Successful completion of CM110 – Content Manager Advanced User Training or equivalent experience (6 months or more using Content Manager and/or Records Manager in a professional environment)
- 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.
- While there will be some technical discussion throughout the course, a strong technical aptitude or background is not required

## Difficulty level



## CERTIFICATE:

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

This course prepares you also for such related Micro Focus certification exam: ASE – Content Manager Administrator v9.3 (Releasing Soon).

## TRAINER:

Authorized Micro Focus Trainer