Training: Micro Focus
CM300 - Content Manager Installation Essentials

TRAINING GOALS:

This two-day, administrator-level course covers the installation of Content Manager. It discusses Content Manager Installation preparation, Content Manager installation, Enterprise Studio configuration, dataset restoration and upgrade, IDOL Indexing, Content Rendering, the Web Client, and additional Workgroup server configuration and maintenance.

Class sizes are limited to 12 participants to provide adequate individual attention under the guidance of expert Software Education trainers. During this course, students 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 Content Manager application
- Apply architecture design and considerations
- Install and configure Content Manager
- Perform ongoing management and troubleshooting
- Upgrade Content Manager
- Use the Content Manager administrative tools

Audience/Job Roles

Target Audience: Records Manager, Records Coordinator

This course is intended for those users who are responsible for the set up and initial design of Content Manager; including, but not limited to, Records Managers, senior business staff, power users, and/or core project team members.

CONSPECT:

- Course Overview
    - Course objectives and overview
    - Course schedule
    - Introducing the lab environment
    - Class logistics

- Architecture Overview
    - Describe Content Manager multi-tier architecture
    - Describe the repository structure
    - List and describe each of the Content Manager clients
    - Describe the Content Manager Service API
    - Describe the various architecture scenarios

- Architecture Scenarios
    - Describe the architecture scenario for small organizations
    - Describe the architecture scenario for regional, country, and International organizations

- Pre-Installation and Installing the Core with Basic Options
    - Create and add the Service account
    - Configure the shares and security for the required Content Manager working directories
    - Add the Service account and create the databases in SQL
    - Install the Content Manager core with basic options
    - Verify service status and test the basic functionality

- Configuring Enterprise Studio
    - Describe the function of the Content Manager Enterprise Studio
    - Describe the GUI for Enterprise Studio
    - Describe the configuration and format of the configuration file

- Testing the Client
    - Start the client and set the default dataset
    - Add a record to Content Manager
    - Verify that the record has been added to Content Manager

- Indexing IDOL and Configuring Events
    - Index the IDOL database
    - Configure and enable event services

- Restoring and Upgrading a Dataset
    - Restore a database
    - Update the service account for the restored database
    - Register and upgrading a dataset
    - Repair the dataset schema Configure events for the restored dataset

- Adding the Web Client, Service API, and WebDrawer
    - Install the Web client, the Service API, and the WebDrawer
    - Test the Web client from another machine
    - Review WebDAV functionality

- Adding Additional Workgroup Servicers

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- Install and configure additional Workgroup servers
- Configure additional Workgroup servers for event processing
- Content Rendering
    - Set up the Service account
    - Enable the Render account
    - Set the Render module default settings
    - Configure OCR Rendering
- Scripted Client Installation
    - Create, modify, and deploy a scripted client installation
- Storage Management
    - Enable workgroup caching
    - Configure workgroup caching options
- Maintenance Considerations
    - Describe the log file locations
    - Describe the best practices
- Integrating CM with MS Office
    - Integrate MS Office with Content Manager
    - Integrate MS Outlook
    - Configure a default dataset for MS Office integration
- Integrating Content Manager Thin Integration with MS Office
    - Install the Content Manager Thin Integration agent
    - Explain the Thin Office integration options
    - Check MS Office documents into Content Manager
    - Open Content Manager records in MS Office using Thin Integration
    - Finalize a record using Thin Integration
    - Create Content Manager records based on an MS Office template registered in Content Manager
- Installing Additional IDOL Components
    - Define OEM and Enterprise IDOL
    - Describe the IDOL components
    - Install the Content Manager Connector
    - Install the additional Content Manager IDOL content services (using the Installer)
    - Install the additional Content Manager IDOL content services (manually)
    - Describe the Content Manager IDOL Image server
- 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

- Upgrading from Records Manager 8
  - Upgrade Content Manager
  - Work in a mixed environment
  - Explain the new features/updates after upgrade
  - Upgrade Content Manager Render
  - Upgrade from Records Manager 8
  - Upgrade client computers

- Basic Troubleshooting
  - Find the various Content Manager log files
  - Enable the logging option
  - Perform basic troubleshooting

REQUIREMENTS:

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

- Windows server and desktop operating systems
- Local security policies and firewalls
- Active Directory (AD) and creating and administering users and groups
- Network architecture and common software deployment tools
- Creating and modifying share permissions
- Database management and connectivity
- Office productivity suites, including email systems (for example, MS Office/Outlook)
- Recommended: Successful completion of CM200, CM110, or equivalent experience (six months or more using RM and/or HP Trim in a professional environment)

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).

TRAINER:

Authorized Micro Focus Trainer