Content Manager Administration Fundamentals (CMAF)

ID CMAF **Price** on request **Duration** 3 days

Who should attend

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

- Successful completion of Content Manager User Fundamentals (CMUF) or equivalent experience (must have used Content Manager and/or Records Manager in a professional environment for 6 months or more)
- 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.

Course Objectives

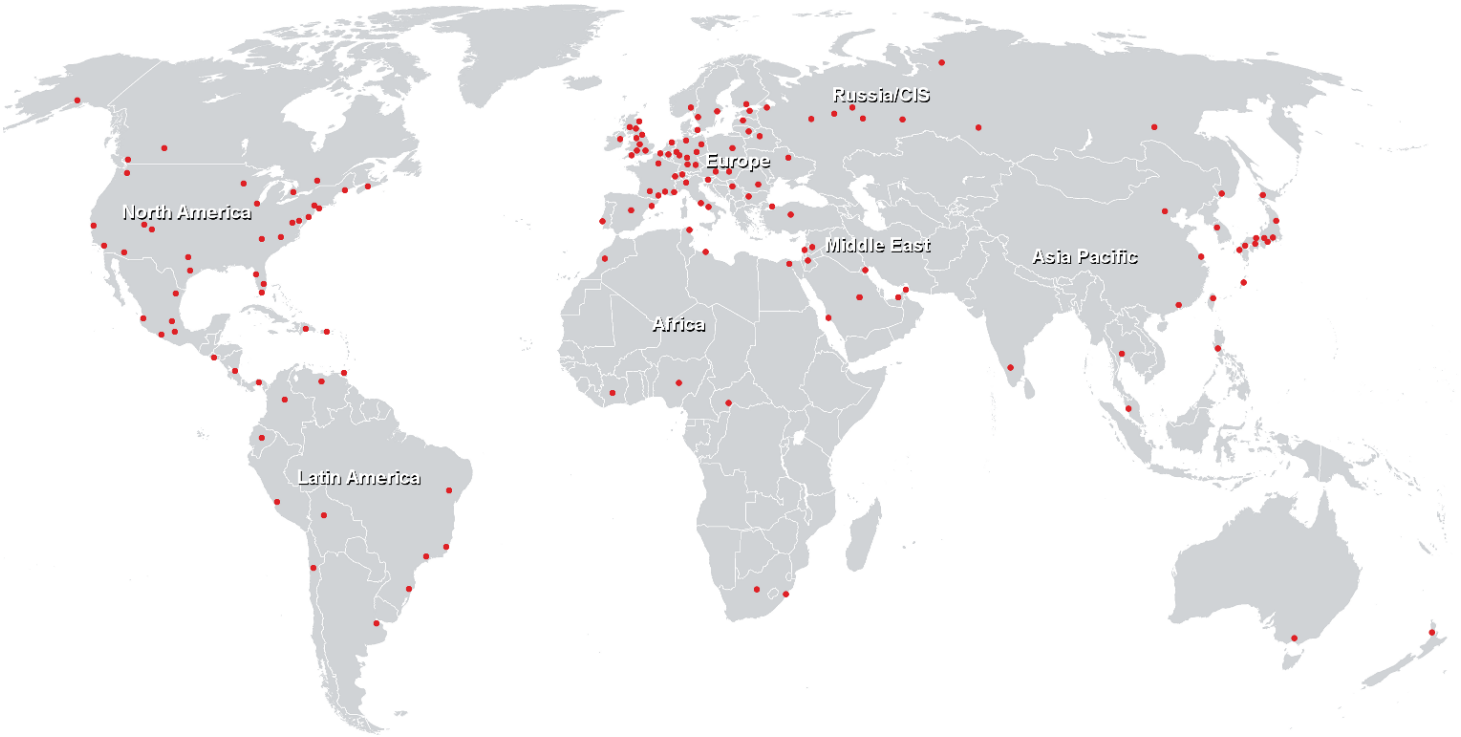
On completion of this course, you should be able to:

- Set up Content Manager security.
- Set up Content Manager locations.
- Create and maintain retention schedules and holds.
- Set up additional fields.
- Use structured titling options.
- Create and maintain a classification system (a record plan).
- Define record types.
- Use action tracking.
- Describe Content Manager indexing.
- Perform and configure Content Manager administrative options.
- Create a document store.
- Set up auto-classification.
- Set up audit configuration options.
- Use Client-Matter functionality.
- Use the import and export options.
- Set up a disposal workflow.
- Review general troubleshooting, tips, and maintenance.

Course Content

- Module 1: Course Overview
- Module 2: New Features and Enhancements
- Module 3: Security
- Module 4: Locations
- Module 5: Retention Schedules and Holds
- Module 6: Additional Fields
- Module 7: Structured Titling Options
- Module 8: Record Types
- Module 9: Action Tracking
- Module 10: Content Manager Indexing
- Module 11: System Administration Options
- Module 12: Document Store
- Module 13: Auto-Classification
- Module 14: Audit Configuration Options
- Module 15: Import and Export (Dataport)
- Module 16: Disposal Workflow
- Module 17: Client and Matter Functionality
- Module 18: General Troubleshooting, Tips, and Maintenance

Training Centres worldwide





Fast Lane Institute for Knowledge Transfer (Switzerland) AG

Husacherstrasse 3
CH-8304 Wallisellen
Tel. +41 44 832 50 80

info@flane.ch, https://www.flane.ch