

# Content Manager Installation Essentials (CMIE)

ID CMIE Price on request Duration 2 days

## Who should attend

This course is intended for those users who are responsible for the setup and initial design of Content Manager. This includes, but is not limited to: Records Managers, senior business staff, power 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 Administration Essentials course or
- equivalent experience (must have used CM and/or Records Manager in a professional environment for 6 months] or more).
- Knowledge of content management principles and internal business processes
- Basic knowledge of Windows Server operating system and management.

## Course Objectives

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

- Describe the CM application.
- Apply architecture design and considerations.
- Install, configure, and maintain CM software: locations, security, record types, and classifications.
- Upgrade an earlier version CM dataset.
- Perform ongoing management and troubleshooting.
- Install and configure IDOL Indexing.
- Render content using the Blazon Enterprise Server.
- Use CM administrative tools.

## Course Content

### Module 1: Course Overview

- Identify the course objectives.
- View the course schedule and logistics.

- View eBooks in different ways.

### Module 2: Architecture Overview

- Describe the CM multi-tier architecture.
- Describe the repository structure.
- List and describe each of the CM clients.
- Describe the CM Service API.
- Describe the various architecture scenarios.

### Module 3: Architecture Scenarios

- Describe the architecture scenario for small organizations.
- Describe the architecture scenario for regional, country, and international organizations.
- Describe the architecture scenario for multiple event servers.

### Module 4: Pre-Installation and Installing the Core with Basic Options

- Create and add the Service account.
- Configure the shares and security for the required CM working directories.
- Add the Service account and create the databases in SQL.
- Install the CM core with basic options.
- Verify service status and test the basic functionality.

### Module 5: Configuring Enterprise Studio

- Describe the function of the CM Enterprise Studio.
- Explore the GUI for Enterprise Studio.
- Describe the configuration and format of the configuration file.

### Module 6: Testing the Client

- Start the client and set the default dataset.
- Add a record to CM.
- Verify that the record has been added to CM.

### Module 7: Indexing IDOL and Configuring Events

- Index the IDOL database.
- Configure and enable Event Services.

## Module 8: Restoring and Upgrading a Dataset

- Restore a database.
- Update the service account for the restored database.
- Register and upgrade a dataset.
- Repair the dataset schema.
- Configure events for the restored dataset.

## Module 9: Installing the Web Client, Service API, and WebDrawer

- Install the Web client, the Service API, and WebDrawer.
- Test the Web client from another machine.
- Understand CM Web Client for multi-tenancy.
- Review Mobile App functionality.

## Module 10: Adding Additional Workgroup Servers

- Add Additional Workgroup servers.
- Configure additional Workgroup servers for event processing.

## Module 11: Content Rendering

- Verify Content Rendering functions and options for the new OpenText™ Blazon Enterprise Server.
- Render content.

## Module 12: Scripted Client Installation

- Create a Scripted Client installation.
- Modify a Scripted Client installation.
- Deploy a Scripted Client installation.
- Describe Cloud storage support.

## Module 13: Storage Management

- Enable Workgroup caching.
- Configure Workgroup caching options.
- Explain tiered storage, encryption, and document compression.

## Module 14: Maintenance Considerations

- Define maintenance considerations.
- Integrate with Enterprise Backup.

## Module 15: Content Manager Thin Integration with MS Office

- Install the CM Thin Office Integration.
- Explain the Thin Office integration options.

- Check MS Office documents into CM.
- Open CM records in MS Office using Thin Integration.
- Finalize a record using Thin Integration.
- Create CM records based on a MS Office template registered in CM.

## Module 16: Installing Additional IDOL Components

- Define OEM and Enterprise IDOL.
- Describe the IDOL components.
- Manually install the additional CM IDOL content services.
- Describe the CM IDOL Image Server.

## Module 17: 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.

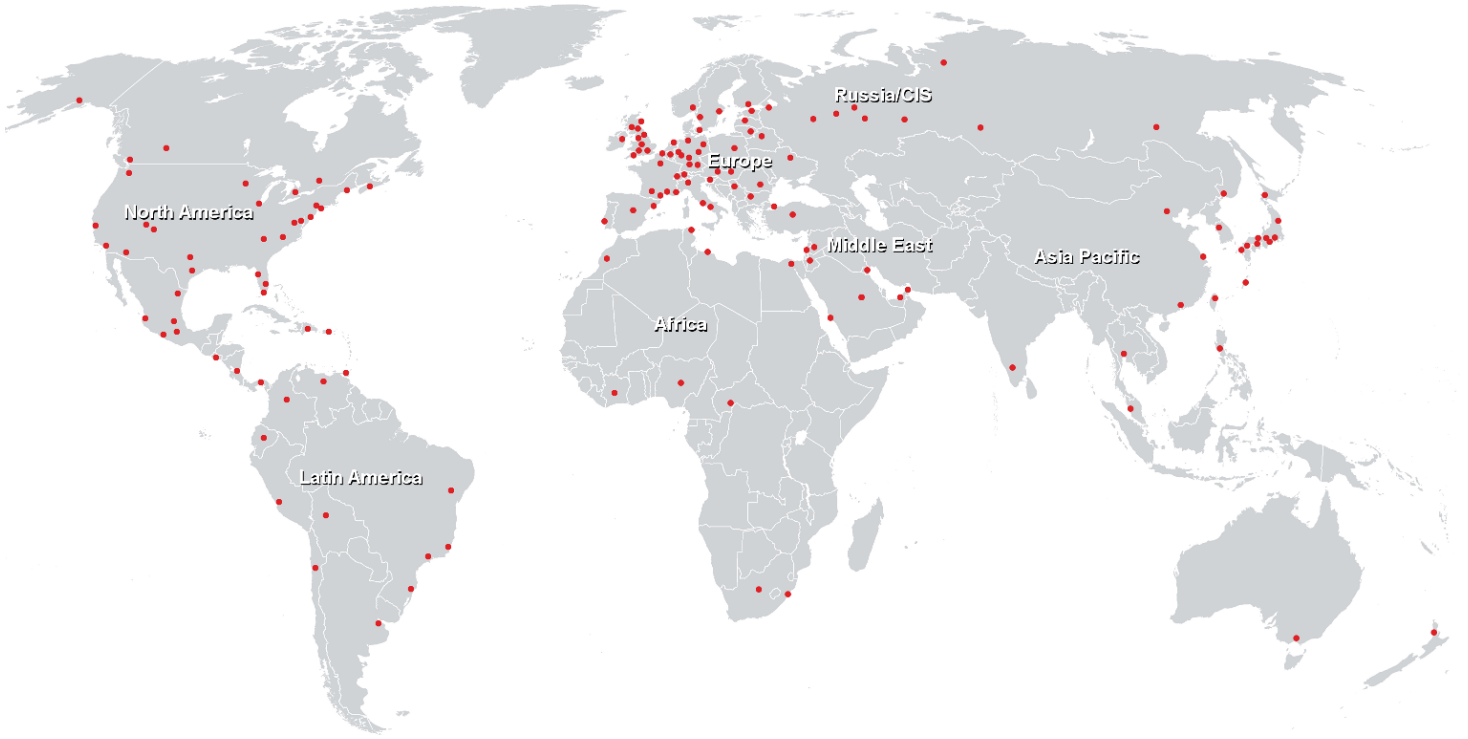
## Module 18: Upgrading from Records Manager

- Describe the steps of an On Top CM upgrade.
- Describe the steps of a new infrastructure CM upgrade.
- Work in a mixed environment.
- Upgrade Client computers.

## Module 19: Basic Troubleshooting

- Find the various CM log files.
- Enable the logging option.
- Perform basic troubleshooting."

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