

Content Manager 9.x Standard Administration Training

Duration: 2 days

Target Audience: Record Manager / Power Users

Pre-Requisite: Content Manager Power User Training / 6-months or more using Content Manger / Records Manager / TRIM

Post-Requisite: Suggested Advanced Administrator Training to learn about additional modules not covered in this course

Description

This course is for anyone responsible for the initial configuration or ongoing support of Content Manager. This course discusses all the elements needed for a successful enterprise deployment of Content Manger. Topics include Security, Locations Table, Retention Schedules and Holds, Classification and Thesaurus Systems, Alerts, User Labels and System Options.

Topics	Description
• Security, Caveats and Access Controls	This module focuses on how to secure Content Manager by utilizing Levels, Caveats and Access Controls.
• Locations	Locations represent the people, places and groups in your organization. This module discusses the various types of locations and how best to use them.
• Retention Schedules and Legal Holds	Disposition and Retention schedules manage records throughout their lifecycle. This module will show how to accurately capture your Schedules and create legal holds when necessary.
• Classification, Thesaurus and Structured Titling	Classification and Thesaurus are two ways to organize your data and can also be used for titling. This module will discuss each and how to
• Custom Properties and Lookup Sets	The creation of metadata fields that suit your corporate needs are always necessary. This module will discuss design considerations for additional fields.
• Record Types and Registration Forms	Record Types are a collection of metadata used to capture your corporate records. This module discusses design considerations and the registration form.
• Alerts and User Labels	Alerts and User Labels are advanced tools to assist with the day to day management of records and information. This module will detail how to best use them.
• System Options and Global Settings	System options and global settings impact the system and how it behaves. These will be reviewed, and their settings discussed.

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