



## Content Manager 9-4

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### Adoption Readiness Tool (ART)

Micro Focus's Adoption Readiness Tool (ART) provides initial and ongoing enablement to your users to ensure that you get the most out of your software. ART is a cost-effective, comprehensive IT education, documentation and performance support solution. ART provides pre-built simulation-based courses in Micro Focus Software that can be accessed by users anytime, anywhere.

ART content provides easy access to self-paced learning content enabling your users to not only dive into an online course, but also to gain direct access to individual components to quickly master specific tasks.

- Access printable job aids targeted towards specific application tasks.
- View or practice a task in a simulated environment.
- Experience full learning with key terms and concepts, product demonstrations and self-assessments by viewing the entire course.

Regardless of which route chosen, users will gain an understanding of the important key concepts, as well as gain competency in both the navigation and functionality of the application.

### Course Description

The Content Manager 9.4 Interactive ART course describes the new features, user interfaces, and typical tasks for the Desktop and Web Client. The course covers the importance of record keeping. This course introduces you to the basic functions of creating, viewing, editing, finding and sharing records in Micro Focus Content Manager. You will learn about the CM Desktop Client and the Web Client interfaces from the end user perspective.

The simulations in this course use Content Manager Version 9.4.

### Audience/Job Roles

This course is intended for senior-level users who are responsible for the day-to-day operations of an organization and who might have elevated responsibility in the Content Manager tool, including but not limited to:

- Content Managers
- Records Coordinators
- Senior Business Staff
- Power Users

- Inquiry Users
- Core project team members

## Course Objectives

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

- Describe the purpose and key features of Content Manager 9.4
- Describe the use and function of the Content Manager Desktop and Web Clients
- Customize the user interfaces for the Desktop and Web Clients
- Create, search, and retrieve records using the Desktop and Web Clients
- Edit, update, and manage records using the Desktop and Web Clients

## Prerequisites/Recommended Skills

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

- High speed Internet connection
- Web browser (IE7+ or Firefox 3.5+)

## Course Topics

Modules	Objectives
<b>Module 1: Introduction to Content Manager</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ The Content Management System</li> <li>▪ Enterprise Content Management (ECM)</li> <li>▪ The Benefits of CM</li> <li>▪ CM Key Terminology</li> <li>▪ Three Zone Approach to Records and Information</li> <li>▪ Differences Between Documents and Records</li> <li>▪ Redundant, Obsolete, and Trivial (ROT) Content</li> <li>▪ CM Compliance</li> <li>▪ Integration with Microsoft Office</li> <li>▪ Integration with Office Online</li> <li>▪ Integration with SharePoint</li> <li>▪ Integration with oneilBridge and Iron Mountain</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 2: Overview of the Content Manager Interfaces</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Content Manager Interface</li> <li>▪ User Types in CM</li> <li>▪ Differences between the CM Client Interfaces</li> <li>▪ Navigate the Full Client GUI *</li> </ul>

- The Desktop Client Interface
- Navigating the Desktop Client Interface
- Change the Look and Feel of CM \*
- Customize the Quick Access Toolbar \*
- Customize the Ribbon \*
- Customize the Ribbon Commands \*
- The CM Web Client Interface
- The Manage Tab
- Navigate the Web Client GUI \*
- The CM Web Client Dashboard
- User Profile
- Creating Records in CM
- Navigating Records in the Web Client
- Overview of WebDrawer
- Viewing an Electronic Document or File in CM WebDrawer
- Physical Records Request using CM WebDrawer
- Summary
- Assessment

<b>Module 3: The Content Manager Web Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ About the Web Client</li> <li>▪ The Web Client Audience</li> <li>▪ The Content Manager Web Client Interface</li> <li>▪ Configuring the Dashboard</li> <li>▪ Navigate the Web Client Dashboard *</li> <li>▪ Add a Document to Favorites *</li> <li>▪ Working with Records</li> <li>▪ Navigating and Viewing Records</li> <li>▪ Navigate between Container and its Contained Records *</li> <li>▪ Creating Requests</li> <li>▪ Create a Temporary Request for the Record *</li> <li>▪ Working with To Do Items</li> <li>▪ Work with To Do Items *</li> <li>▪ Limitations of the Web Client</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 4: Electronic Documents in the Web Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ About Record Hierarchies</li> <li>▪ Create an Electronic Document in the Web Client *</li> <li>▪ Viewing Electronic Documents in the Web Client</li> <li>▪ Record Properties</li> <li>▪ View an Electronic Document in the Web Client *</li> <li>▪ Using MS Office Documents in CM</li> <li>▪ Open a CM Document in MS Word using the Web Client *</li> <li>▪ About Revisions</li> <li>▪ About Versions</li> <li>▪ Editing MS Office Documents</li> <li>▪ Edit Document using Installed Application *</li> <li>▪ Checkout and Edit using Office Online</li> <li>▪ Edit a Document using Office Online *</li> <li>▪ About Finalizing Documents</li> <li>▪ Make a Document Final in the Web Client *</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>

<b>Module 5: CM Web Client Search Methods</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Searching for Records</li> <li>▪ A Quick or Simple Search</li> <li>▪ Conduct a Simple Search in the Web Client *</li> <li>▪ The String-based Search Editor</li> <li>▪ The Default Boolean Search Editor</li> <li>▪ A Form Search</li> <li>▪ Search Using Form Search in the Web Client *</li> <li>▪ Saved Searches</li> <li>▪ Save a Search in the Web Client *</li> <li>▪ The Content (IDOL) Search</li> <li>▪ Browse via Classification in the Web Client *</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 6: Using Physical Records in the Web Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ About Physical Records</li> <li>▪ Create a Physical Record in the Web Client*</li> <li>▪ Managing Physical Record Locations</li> <li>▪ About Requests</li> <li>▪ Manage a Physical Record in the Web Client*</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 7: Managing Records in the Web Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Tag and Perform Tasks on Records</li> <li>▪ Creating a Report in the Web Client</li> <li>▪ Perform Tasks on Tagged Records in the Web Client *</li> <li>▪ Content Manager Notes</li> <li>▪ Add a Note to a Record in the Web Client *</li> <li>▪ About Security and Access</li> <li>▪ Assign Security and Access Control to a Record *</li> <li>▪ About Action Tracking</li> <li>▪ Track and Complete a Record Action in the Web Client *</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>

<b>Module 8: Introduction to the Desktop Clients</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Full and Desktop Client Users</li> <li>▪ The CM Full Client Interface</li> <li>▪ Navigate the Full Client GUI *</li> <li>▪ Navigating the Desktop Client Interface</li> <li>▪ Navigate the Desktop Client GUI *</li> <li>▪ Working with the Favorites Shortcuts</li> <li>▪ About Recent Shortcuts</li> <li>▪ Working with Trays</li> <li>▪ Customize the List Pane in the Desktop Client *</li> <li>▪ Customize the View Pane in the Desktop Client *</li> <li>▪ Additional Full and Desktop Client Functions</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 9: Electronic Documents in Desktop Clients</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ About Record Hierarchies</li> <li>▪ Create an Electronic Document Using MS Office *</li> <li>▪ Create an Electronic Document Using Other Methods *</li> <li>▪ About Dropzones</li> <li>▪ Using MS Office Documents in CM</li> <li>▪ Open a CM Document in MS Word *</li> <li>▪ Viewing Electronic Documents</li> <li>▪ View an Electronic Document in the Desktop Client *</li> <li>▪ Editing Documents</li> <li>▪ Edit the MS Office Document *</li> <li>▪ Copying Documents</li> <li>▪ Record Properties</li> <li>▪ About Revisions</li> <li>▪ About Versions</li> <li>▪ Make a Document Final in the Desktop Client *</li> <li>▪ About Finalizing Documents</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>

<b>Module 10: CM Desktop Client Search Methods</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Searching for Records</li> <li>▪ Quick or Simple Search</li> <li>▪ The Default Boolean Search Editor</li> <li>▪ The Multifield Search Editor</li> <li>▪ The String-based Search Editor</li> <li>▪ Document Content Search Methods</li> <li>▪ Conduct a Simple Search in the Desktop Client *</li> <li>▪ Conduct a Simple Search Using Search Editors *</li> <li>▪ The Search Menu and Ribbon</li> <li>▪ Saved Searches</li> <li>▪ Save a Search *</li> <li>▪ Use Classifications to Browse Records in the Desktop Client *</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 11: Using Physical Records in the Desktop Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ About Physical Records</li> <li>▪ Create a Physical Record in the Desktop Client*</li> <li>▪ Managing Physical Record Locations</li> <li>▪ About Requests</li> <li>▪ Manage a Physical Record in the Desktop Client*</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>
<b>Module 12: Managing Records in the Desktop Client</b>	<ul style="list-style-type: none"> <li>▪ Introduction</li> <li>▪ Objectives</li> <li>▪ Tag and Add Records to Favorites in the Desktop Client *</li> <li>▪ Add Note to a Record in the Desktop Client *</li> <li>▪ About Security and Access</li> <li>▪ About Action Tracking</li> <li>▪ Track and Complete Actions in the Desktop Client *</li> <li>▪ Viewing User Permissions</li> <li>▪ Summary</li> <li>▪ Assessment</li> </ul>

**Module 13: Managing  
Emails in the Desktop Client**

- Introduction
- Objectives
- About Checking-in Emails
- Enabling the MS Outlook Integration
- The CM Ribbon in MS Outlook
- Send a Document to MS Outlook Using the Desktop Client \*
- Check-in Email with Attachment in the Desktop Client \*
- Linking an Outlook Folder with CM
- Managing and Removing Links
- Link an MS Outlook Folder with CM \*
- Search for an Email Record in the Desktop Client \*
- Summary
- Assessment

\* Indicates a simulation