

## **FileNet P8 4.0 Records Manager Workshop Summary**

### **Description**

This workshop teaches experienced business analysts and administrators the skills required to design, implement and maintain the Records Management system using IBM FileNet 4.0 Records Manager as a part of the FileNet P8 4.0 enterprise solution. This workshop prepares business analysts to design a Records Management system that meets compliance requirements. This workshop prepares administrators and business analysts to configure and maintain the Records Management system to comply with the company Records Management policies.

### **Objectives**

At the end of this workshop, students will be able to:

- Provide resources to design the enterprise Record Management system with the skills to adequately leverage FileNet P8 4.0 Records Manager
- Configure and maintain the enterprise Records Management system

### **Topics**

- First glance at the Records Manager
- Records Management concepts including but not limited to Records and Links objects and classes, File Plans, Declaration methods, Holds, and Disposition
- Designing Records Management system based on compliance requirements and enterprise records management policies
- Configuring Records Management system for Records Declaration and Records Administration
- Understanding security model and classified records
- Best Practices for automating Records Management system
- Advanced Records Searches and Audit
- Maintaining and troubleshooting Records Management system: administrative tasks

### **Audience**

The workshop material assumes experience in the enterprise solution design using FileNet P8 Platform. A working knowledge of P8 4.0 platform architecture and ECM concepts is assumed for this workshop. The audience for this workshop should be technical in nature.

### **Prerequisites**

- Basic operating system administration skills
- Must have attended the FileNet P8 4.0 Administration workshop prior to attending this workshop
- Experience working with computers and Networks

### **Duration**

Four days & ½ day set-up.

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