

SSM 116: Information and Documentation Compliance

Introduction

This course provides a comprehensive overview of all DCM functionality and configuration features. Starting with basic repository configuration, participants will continue by exploring the DCM administration interface, and learn how to use the administration functions to configure DCM to meet specific compliance requirements and business needs.

Objectives

- Describe DCM features and functionality
- Explain the DCM architecture
- Configure the DCM application:
 - Auditing
 - Users, Groups, Roles, and Permissions
 - Business Applications
 - Document Classes
 - Lifecycles and Lifecycle Extensions
 - Controlled Workflows
 - Required and Optional Approvers
 - Auto-naming Schemes
 - User List Rules
 - Notifications
 - PDF Overlays
 - Electronic Signatures

Course Outline

DCM Overview

- Requirements
- DCM Features

Features and Functionality

- Key Concepts
- DCM Basic Interface
- Creating a Controlled Document
- Working with Controlled Documents
- Importing and Converting
- Signoffs
- Additional Functionality

DCM Configuration Overview

- DCM Configuration

- Configuration Tasks
- Configuration Tools
- DCM Use Cases

Users and Groups

- Users
- DCM Overrides
- Groups

Roles, Permissions, and Custom Object Types

- Roles
- Creating Roles
- Permissions
- Creating Permission Sets
- Custom Object Types
- Document Templates

Auto-naming Schemes

- Auto-naming Overview
- Auto-naming Configuration
- Best Practices

Controlled Lifecycles

- Lifecycles
- DCM Lifecycle States
- Custom Lifecycles

Controlled Workflows

- Workflow Overview
- Workflows in DCM
- Using Controlled Workflows
- Workflow Reporting

Business Applications

- Business Application Overview
- Configuring a Business Application

Document Classes

- Document Class Overview
- Configuring a Document Class

Lifecycle State Extensions

- Lifecycle State Extension Overview
- Configuring State Extensions

Change Management and Document Relationships

- Change Requests
- Change Request Document Class
- Change Notices
- Change Notice Document Class
- Relationship Types
- Creating Relationship Types
- Relation Types

User List Rules and Notifications

- User List Rules Overview
- Configuring User List Rules
- Configuring Notifications

Overlays and Controlled Printing

- PDF Overlays
- PSS Overlay Configuration
- Alternate Overlay Configurations
- Controlled Printing
- Configuring Controlled Printing

Electronic Signatures

- Electronic Signatures Overview
- Enabling Electronic Signatures
- Electronic Signature Templates

DCM Reports

- DCM Reports Overview
- Generating Reports
- DCM System Validation