

CM9 End User Comprehensive



Master the Content Manager 9 recordkeeping

OVERVIEW

Develop an understanding of recordkeeping, your obligations and the benefits of using Content Manager 9. This course introduces the basic functions of creating, editing, finding and sharing records in CM9. You will extend your skills to workflow, security and other advanced functions to become a proficient end user of the system.

Records Management

- Who Needs to Capture What
- What is a Business Classification Scheme

Content Manager Environment

- The Ribbons, Shortcuts Bar & Right Click Menus
- Customising the Panes
- Setting up Favorite Records

Creating Records

- Record Types
- Record Metadata
- Creating a New Folder
- Creating a New Document Record
- Dragging and Dropping a Document into Content Manager

Finding HP RM Records

- Using the Search Editors
- Refining Search Results
- Filtering Search Results
- Advanced Searching
- Saving Regularly Used Searches

Working with Electronic Documents

- Editing Documents Online
- Revisions of a Document
- Creating a New Version
- Creating User Notes

Capturing Email

- Sending an Email from Content Manager
- Check In Emails & Attachments from Outlook

Working with Locations

- Location Types
- Finding Locations
- Creating External Locations

Security Management

- About Security & Access
- Managing Access Controls

Creating Workflow with Actions

- Assigning Actions
- Completing Actions
- Adding Additional Actions

Advanced Searching

- Searching by Dates
- Searching by Record Items & Selection Search Style
- Searching by Actions

Record Relationships

- Relating Records
- Navigating to Related Records

Managing Email

- Setting up a Check In Style
- Check In on Send
- Using Linked Folders in Outlook

Reports

- Printing Reports
- Printing Record Labels

DURATION

1 day

DELIVERY MODES

- ✓ Scheduled classes
- ✓ Onsite classes
- ✓ Webinar
- ✓ Presentation

PRE-REQUISITES

None

CORE COMPETENCIES

- ✓ Creating Records
- ✓ Finding Records
- ✓ Capturing Email
- ✓ Workflow & Relationships

**BOOK ONLINE
NOW**

Or call **02 8824 4677**
for more information



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