

# Content Manager 9 Level 1



## Master the Content Manager recordkeeping system

### OVERVIEW

Develop an understanding of recordkeeping, your obligations and the benefits of using Content Manager. This course introduces you to the basic functions of creating, editing, finding and sharing records in Content Manager. You will become a proficient end user of the system.

#### Records Management

- Who Needs to Capture What
- Lifecycle of a Record
- The Content Manager Recordkeeping System
- What is a Business Classification Scheme
- Glossary of Terms

#### Content Manager Environment

- Opening Content Manager
- The Ribbons
- The Shortcuts Bar
- Right Click Menus
- Using the Search Pane
- Customising the List Pane
- Working with the View Pane
- Setting up Favorite Records
- Tag and Task

#### Creating Records

- Record Types
- Record Metadata
- The New Folder Screen
- Business Classification Titling
- Viewing Scope Notes
- Free Text Titling
- Creating a New Folder
- The New Document Screen
- Creating a New Document Record
- Dragging and Dropping a Document into Content Manager

#### Finding HP RM Records

- The Search Editors
- Using the Multi-Field Editor
- Using the Boolean Editor
- Refining Search Results
- Wild Card Searching
- Filtering Search Results
- Advanced Searching
- Saving Regularly Used Searches

#### Working with Electronic Documents

- Send to Content Manager
- Editing Documents Online
- Revisions of a Document
- Drag and Drop a New Revision
- Finalise a Record
- Creating a New Version
- Creating User Notes

#### Capturing Email

- Sending an Email from Content Manager
- Attaching Records from MS Outlook
- Check In Emails from Outlook
- Check In a Mail Attachment from Outlook

#### DURATION

0.5 days

#### DELIVERY MODES

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

#### PRE-REQUISITES

None

#### CORE COMPETENCIES

- ✓ Record Management
- ✓ Creating Records
- ✓ Finding Records
- ✓ Capturing Email

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Or call **02 8824 4677**  
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