

Content Manager 9 Level 2



Harness the power of CM to improve efficiency

OVERVIEW

Use the features of Content Manager to improve the flow of documents and information for your business processes. Gain control of access to documents, streamline workflow, and provide context to information through record relationships. Become an expert end user.

Working with Locations

- Location Types
- Navigating Locations
- Finding a Location
- Creating External Locations

Security Management

- About Security & Access
- Managing Access Controls
- Viewing and Saving the Audit Log
- Searching the Audit Log

Creating Workflow with Actions

- Actions and Records
- Assigning Actions
- Manually Alerting to Actions via E-mail
- Reassigning Actions
- Rescheduling an Action
- Completing Actions
- Adding Additional Actions

Advanced Searching

- Using the String Search Editor
- Searching by Dates
- Searching by Record Items
- Using the Selection Search Style
- Searching by Actions

Record Relationships

- Relating Records -Related To
- Related Records - Alternatively Contains / Within
- 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

0.5 days

DELIVERY MODES

- ✓ Onsite classes
- ✓ Webinar
- ✓ Presentation

PRE-REQUISITES

Content Manager Level 1 or equivalent experience

CORE COMPETENCIES

- ✓ Locations
- ✓ Security
- ✓ Actions
- ✓ Relationships
- ✓ Reports

**BOOK ONLINE
NOW**

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



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