

# Content Manager 9 eLearning



## End Users master Content Manager

### OVERVIEW

Our Content Manager eLearning provides you with a unique offering for all your users; users that are new to Content Manager, users that want to learn more about using Content Manager and even to advanced users who require a quick refresher on some of the Content Manager functionality. Train online, anytime!

#### An Introduction to Recordkeeping

- Recordkeeping essentials
- Lifecycle of a record
- Business classification scheme

#### Content Manager – What's new

- Introducing new CM9 features

#### The Environment

- The CM environment
- Right click shortcuts
- The Favorites shortcuts
- Customising panes
- Using the Search Pane
- Get global settings

#### Record Creation

- About record types
- Free text titling
- Create a new Folder
- Create a new Document
- Moving records to CM
- Editing a record

#### Searching

- Search editors & methods
- Multi-field searching
- Basic boolean search
- Effective title word searching
- Setting search preferences
- Saved searches

#### Working with Electronic Records

- Revisions of a document
- Mark a record as final
- Creating new versions
- Creating a supercopy
- Adding user notes
- Revisions of a document

#### HP RM & Outlook Email

- Turning on integration
- Sharing records via email
- Emailing from Outlook
- Checking In emails
- Check in Styles
- Check In emails on Send
- Linked folders

#### Shortcuts & Toolbars

- Efficiency with Favorites
- Efficiency with Trays
- Exploring toolbars & menus

#### Locations

- About Locations
- Navigating Locations
- Adding an External Location

#### Advanced Searching

- Customised Searches
- Building And/Or searches
- String Searches

#### Security

- About security
- Changing record access

#### Record Relationships

- About record relationships
- The Related To relationship
- Alternatively within/contain

#### Actions

- Adding, receiving & completing an Action
- Reschedule an Action
- Reassigning an Action
- Adding additional Actions
- Searching for Actions

#### DURATION

1 day – 3-month subscription

#### DELIVERY MODES

- ✓ eLearning
- ✓ Hosted online
- ✓ Subscription based

#### PRE-REQUISITES

None

#### CORE COMPETENCIES

- ✓ Recordkeeping practices
- ✓ Creating records
- ✓ Finding records
- ✓ Working with digital records

## TRY A FREE DEMO

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



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