

Content Manager Record Types

Online Training for Administrators



Become an Expert in intelligent design of Record Types

OVERVIEW

Record Type design drives quality information management and User adoption. This online course provides the opportunity to incorporate a range of automated features and intelligent behaviour in Record Types, and streamline record creation for digital recordkeeping.

Assessing Record Type Needs

- Record Type relationships with other Items
- Assessing business unit requirements
- Decisions for Record Type creation
- Record Type design
- Record Type behaviours

Advanced Record Type Creation

- General tab
- Numbering tab
- Menu tab
- Defaults tab
- Additional Fields tab
- Forms tab

Security and Access

- Access controls vs. default record access
- Managing access
- Setting default record access
- Setting Copy Style options

Developing Complex Structures

- Automatic Sub Folders
- Specialist Record Types
- Client Record Type behaviour and structure
- Matter Record Type behaviour and structure
- Client & Matter records – the user experience
- Developing hierarchies

DURATION

0.5 day – 3 month individual subscription

DELIVERY MODES

- ✓ Online eLearning

PRE-REQUISITES

Basic EDRMS Administration

CORE COMPETENCIES

- ✓ Planning
- ✓ Business Analysis
- ✓ Advanced Configuration

TRY A FREE DEMO

www.el.LinkedException.com.au

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



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