CONTENT MANAGER
ACTION TRACKING AND WORKFLOW



Course Duration

4 Hours

Audience / Roles

End Users, Records Coordinators, Administrators

Course Objectives

At the completion of this course, attendees will possess the knowledge and skills to create, apply and manage Actions and Action Tracking, and Activities in the Workflow frame. They will know how to search for Actions, Activities and responsible locations, and how to create Action and Workflow statistic reports.

Prerequisites

- Knowledge of Content Manager or Records Management principles
- System Administration experience
- Basic Windows PC skills and experience

Course Description

This training course provides users with advanced knowledge on how to create, apply and manage Action Tracking and Workflows within Content Manager.

Course Content

Action Tracking vs Workflow

- Understanding the differences between Action Tracking and Workflow

Action Tracking - Administration

- Creating, modifying and deleting Actions and Procedures

Action Tracking

- Applying, reassigning, updating and completing Actions
- Searching for current and overdue Actions and responsible locations

Workflow - Administration

- Creating Workflow templates
- Creating, modifying and deleting Activities

Workflows

- Applying Workflow templates to records
- Navigating, reassigning, updating and completing Activities
- Searching for Workflow templates, current and overdue Activities and responsible locations

Reporting

- Run Action Record Statistic and Workflow Statistic Reports

Troubleshooting

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