CONTENT MANAGER ADVANCED SEARCHING



Course Duration

2 Hours

Audience / Roles

End Users

Course Objectives

At the completion of this course, attendees will possess the knowledge and skills required to perform basic and advanced searches, create, save and share searches, and format and sort search results.

Prerequisites

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

Course Description

This training course provides users with the knowledge of Content Manager's searching capabilities and functionalities, including how to create and save searches, create multi criteria searches, and sort and format results.

Course Content

Searching - Quick Search Toolbar

- Using the Quick Search Toolbar
- Saving favourite Search By methods

Advanced Searching - Search Ribbon

- Creating searches with multiple search instructions
- Using filters, record types and options
- Wildcard searching
- Recursive searcing

Search Editor

- Understanding Search Editor options

Refine a Search

- How to refine searches

Saved Searches

- Creating Saved Searches - public and private Saved Searches
- Sharing Saved Searches
- Creating Search Groups

Sort and Format Search Results

- Utilising the Sort and Format options

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wyldlynx.com.au WyldLynx

1300 WyldLynx (1300 9953 5969) contact@wyldlynx.com.au