CONTENT MANAGER EMAIL MANAGEMENT



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 email records from Content Manager, save emails and attachments, create and use Linked Folders and Check In Styles. They will also know how to re-activate Content Manger Add-Ins.

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 and Outlook's integration capabilities and functionalities, including how to save emails and/or email attachments, create and use Check In Styles and Outlook linked folders.

Course Content

Outlook Integration

- Activating Desktop Add-Ins
- Trouble shooting

Sending Records from Content Manager

- Using the Mail functions in Content Manager
- Using the Reference functions in Content Manager

Saving Emails and/or Attachments

- Saving emails and/or attachments
- Saving and sending emails

Linked Outlook Folders and Content Manager

- Creating Outlook linked folders

Check In Styles

- Creating Check In Styles via Content Manager
- Creating Check In Styles via Outlook

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