CONTENT MANAGER END USER TRAINING



Course Duration

3 Hours

Audience / Roles

End Users

Course Objectives

At the completion of this course, attendees will possess the knowledge and skills to create, save and search for records using Content Manager. They will be able to navigate the Content Manager interface, understand and be able to save documents through Content Manager and Microsoft Office applications, search for records and locations, and update notes, titles and record metadata.

Prerequisites

- Knowledge Microsoft Office applications - Word and Outlook
- Basic Windows PC skills and experience

Course Description

This training course provides users with an introduction to using Content Manager, including how to capture and manage information, documents and records within their organisation, how to manage locations and how to search.

Course Content

Introduction to Content Manager

- What is Content Manager and what is it used for

Creating New Records

- Creating and saving Records

Locations

- Understanding Location Types
- Creating Locations

Modifying Records

- Editing Records
- Modifying Record metadata

Searching

- Basic and advanced search methods
- Saved Searches

Microsoft Office Integration

- Activate and use Desktop Add-Ins
- Save from Microsoft Office applications

Email Management

- Saving Emails and/or attachments
- Creating Check In Styles and Linked Folders

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