CONTENT MANAGER MICROSOFT OFFICE INTEGRATION



Course Duration

1½ Hours

Audience / Roles

End Users

Course Objectives

At the completion of this course, attendees will possess the knowledge and skills to appropriately open and save records from Microsoft Office applications, insert objects from Content Manager into Microsoft Offices documents and how to troubleshoot Content Manager integration issues

Prerequisites

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

Course Description

This training course provides users with an overview of the how Content Manager and Microsoft Office applications work efficiently and effectively with each other. Microsoft Office integration makes record keeping even easier and this session includes understanding and using Microsoft Office integration with Content Manger, and how to troubleshoot Content Manager Add-Ins

Course Content

Microsoft Office Integration

- Activating Desktop Add-Ins
- Troubleshooting activation issues

New/Open Records from Microsoft Office

- Utilising templates in Content Manager
- Accessing records from Microsoft Office

Saving from Microsoft Office Applications

- Saving a document from Microsoft Office
- Checking a document in prior to closing

Inserting Objects from Content Manger

- Inserting pictures, text or objects into a Microsoft Office document from Content Manager

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