



INFORMATION | **SIGMA**
PROFICIENCY | **DATA**

Course includes:

- Flexible training modules
- Access to Virtual Training Environment
- Course Material
- Practical Desktop Training
- Certificate of Completion
- Certified trainer (all trainers are practitioners)

Training dates & pricing

Please refer to our website for training dates and pricing.

ONLINE TRAINING

Content Manager for Administrators

Our online training modules will prepare you with the knowledge and skills to configure a dataset and provide you with an overview of how each configuration option works.

The course will guide you through a logical sequence to configure a new dataset or refine an existing dataset.

This course will give participants an understanding of how to optimise and configure Content Manager to better support their organisational processes and requirements

Intended Audience:

- Administration users of Content Manager
- Power users with administration rights in Content Manager
- Staff who need a refresher on Administration Tools

Duration:

- Each module will take 2 – 3 hours

Prerequisites for Participants:

- Internet access
- Experience in using Records Manager / Content Manager
- Knowledge of internal business processes
- **1 week prior** to course commencement, all participants must test their access to the virtual training environment. **Note:** *instructions will be sent with registration confirmation*

Training Modules:

The Administration Course has been split into modules, which can undertaken in sequence or individually as needed.



Content Manager for Administrators Online Training Modules

Course Module 1 – Security and Users

- Protection of information. Creation, maintenance and deletion of security levels and caveats
- Location security linkages with access controls
- Hierarchical structure, establishing user types and setting up organisations, positions and people.

Course Module 2 – Retention schedules; Classification and Thesaurus

- Understanding and setting up elements of retention schedules including the archive and destroy triggers and the purpose of the Retention Holds
- Purpose of classification schemes and creating classification top level with parent child relationships
- Examining the difference between classification titling and thesaurus titling.
- Creating top terms and related terms.

Course Module 3 – Record types; Additional Fields and lookup sets; and Automated Part Rules

- Creating user defined fields to capture additional information
- Available record type formats.
- Creating Record types and designing data entry forms. Establishing automated part rules for the creation of new records.

Course Module 4 – Action tracking, Reports & Statistics, Alerts and User Labels

- Understanding action tracking to trace the flow of records and tasks. Creating actions and procedures.
- Designing report layouts. Understanding statistic reports.
- Understanding alert behaviour. Creating, modifying, suspending and removing alerts

Course Module 5 – CM System Options, Global Settings & Customisation

- Understanding the system options and behaviours to configure Content Manager to suit your organization.
- Setting up and implementing global settings for your organisation.

Course Module 6 – Searching

- Exploring and understanding the different search methods: Simple, Boolean, string, content, parameter
- Perform simple search functions and navigate between files and documents
- Perform advanced (Boolean) searches (and/or/not and brackets)
- Sorting / filtering options, preview and print searches
- Use of the multiple field search form
- Creating saved searches for the individual and the group

Course Module 7 - Emails, Check in Styles and Document queues

- Understanding the integration between Content Manager and e-mail
- Using the Content Manager tab within Outlook. Creating email templates
- Exploring check In styles behaviour
- Understanding and creating document queues.