CONTENT MANAGER ACTIONS AND PROCEDURES CONFIGURATION AND ADMINISTRATION

Platform
Content Manager Desktop or Context Client

Course Duration
1 Day

Delivery Mode
Remote training session via Microsoft Teams

Training is delivered within your environment to contextualise the training to your setup and build version

The training session will be recorded and provided upon conclusion of training for your reference

Pre-requisites
Content Manager Introduction and Intermediate

Audience
Suitable for staff who will be responsible for Action and Procedure template creation and management

This training course allows you to have up to a maximum of 5 trainees to attend

Overview

This training course provide attendees with an understanding of their role in configuring and administering the Actions and Procedures functionality in Content Manager.

Attendees will learn how to create and maintain action and procedure templates, attach actions to records, reassign and complete actions. This training also includes running overdue action reports.

Prior to training, participants will be asked to provide examples of four procedures, that can be used during the training.

Topics

This training course will cover the following:

- Overview of Action and Procedures functionality
- Understanding the importance of Business Analysis and Process Mapping
- How to document processes before configuration
- Configuring Actions
- Configuring Procedures
- Attaching actions to a record (including updating Notes)
- Assigning and Reassigning Actions
- Working with the Records Due Tray
- Completing actions
- Running overdue action reports

Please note that the provision of training materials or digital handouts are not included within training due to the development of generic training materials can not be achieved for a system that can be configured and used in multiple ways. Quotes for custom training materials can be provided upon request.

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