

CONTENT MANAGER ADVANCED



Platform

Content Manager Desktop or
Context Client

Course Duration

3 hours

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

Staff with responsibility for
creation and management of
folders

This training course allows you
to have up to a maximum of 10
trainees to attend

Overview

This training course provides attendees with an understanding of their role in creating and managing folders on behalf of their team.

Attendees will gain a solid understanding of the Business Classification Scheme (BCS) and how to navigate it to create and search for folders. They will also learn how to create virtual folders, which can be used to create customised views to information in Content Manager.

This course will assist attendees to understand and apply security to meet their team and the organisation requirements regarding the sharing and distribution of information.

Topics

This training course will cover the following:

- ▶ Understanding the role of an Advanced User
- ▶ Understanding the Business Classification Scheme
- ▶ Navigating and searching the Business Classification Scheme
- ▶ Understanding how to file information according to its purpose
- ▶ Creating and managing folders
- ▶ Understanding, applying and managing security on folders
- ▶ Modifying folder properties
- ▶ Moving documents between folders
- ▶ Creating and managing virtual folders to create customised views
- ▶ Creating and maintaining record relationships

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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