

CONTENT MANAGER PROACTIVE ADMINISTRATION AND MAINTENANCE



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, Intermediate and Advanced

Audience

Suitable for staff responsible for records appraisal and disposal activities

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

Overview

This course provides attendees with an understanding of their role in updating and maintaining key configuration components of Content Manager to ensure the solution is running effectively and continuing to meet business needs whilst being compliant with recordkeeping standards.

Attendees will learn how to update and configure the Business Classification Scheme, Retention and Disposal Schedules and Audit options. They will also gain an understanding of User Options, Global Settings and how to troubleshoot common end user issues.

Topics

This training course will cover the following:

- ▶ Updating and Configuring the Business Classification Scheme
- ▶ Updating and Configuring Retention and Disposal Schedules
- ▶ Understanding Security Caveats, Levels and Access Controls
- ▶ Creating and Maintaining Saved Searches
- ▶ Creating and Maintaining Locations
- ▶ Understanding User Options
- ▶ Understanding Global Settings
- ▶ Understanding Duplicate Document, Email Functionality
- ▶ Understanding Single Document Instancing
- ▶ Understanding Offline Records and the check-out and check-in process
- ▶ Understanding and Configuring Audit Options
- ▶ Troubleshooting common end user issues

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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