

TRAINING COURSE OUTLINE:

CONTENT MANAGER WEB CLIENT SEARCHING AND NAVIGATION MASTERCLASS



Platform

Content Manager Web Client

Course Duration

1 ½ 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 Web Client Introduction

Audience

Suitable for all staff with a Content Manager license

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

Overview

This training course provides attendees with an advanced understanding of Content Manager's search functionalities, including the ability to configure and run complex record and location searches.

Attendees will learn how to create and use Saved Searches and how to refine searches for records and locations.

Topics

This training course will cover the following:

- ▶ Using the Quick Search bar
- ▶ Searching for Contacts (Locations)
- ▶ Undertaking advanced Searches
- ▶ Creating, running and managing Saved Searches
- ▶ Creating Saved Search Groups
- ▶ Performing a Form Search

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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