CONTENT MANAGER WEB CLIENT USING ACTIONS AND PROCEDURES

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 and Intermediate

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 understanding of Content Manager's Actions and Procedures functionality and how it can be used to assist the organisation with business processes and meeting required timelines.

Attendees will learn how to attach actions and procedures to records, access their Records Due, complete and reassign actions, and run overdue action searches.

Topics

This training course will cover the following:

▸ Overview of Actions and Procedures functionality
▸ Attaching actions to records (including adding Notes)
▸ Assigning actions
▸ Working with the Records Due Tray
▸ Completing actions
▸ Reassigning actions
▸ Running overdue action searches

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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