

CONTENT MANAGER WORKFLOW CONFIGURATION AND ADMINISTRATION



Platform

Content Manager Full Client

Course Duration

1.5 Days

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 who will be responsible for Workflow template creation and management.

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

Overview

This training course provides attendees with an understanding of their role in configuring and administering Workflow Templates in Content Manager.

Attendees will learn how to create workflow templates with activities, attach reference documents to workflows, initiate and complete workflow activities, reassign and authorise workflow activities.

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

This training is most effective with no more than five participants.

Topics

This training course will cover the following:

- ▶ Overview of Workflow functionality
- ▶ Understanding the importance of Business Analysis and Process Mapping
- ▶ How to document processes before configuration
- ▶ Understanding the Workflow Editor
- ▶ Creating Workflow Templates and Activities
- ▶ Attaching reference documents to Workflows
- ▶ Initiating Workflows from a Record
- ▶ Initiating Workflows without a Starting Record
- ▶ Viewing and Completing Workflow Activities Assigned to Me
- ▶ Rolling back, reassigning and authorising Workflow Activities
- ▶ Updating and administering Workflow Templates
- ▶ Running Workflow 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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