

HP RM 8 Action Expert



Drive effective workflow through Action tracking

OVERVIEW

Actions and Procedures provide the workflow structure to streamline business process. Learn to develop Actions that support user requirements, and construct searching and reporting methods for improved information management and continuous improvement of process.

Establishing Actions

- An overview of Actions
- Actions Vs. Workflow
- Action Styles
- The Use of Responsible Locations
- Managing Action Names
- User Permissions

Creating & Maintaining Actions

- Creating Actions
- Action Maintenance Tasks
- Procedure Maintenance Tasks

Adding & Managing Record Actions

- Accessing Actions
- Adding, Inserting, and Reassigning a Record Action
- Changing the Duration and Rescheduling a Record Action
- Completing a Record Action
- Deleting a Record Action

Searching for Actions & Procedures

- About Action searching in RM8
- Record Action method
- Actions method
- Action Steps method
- Record Actions Item searches
- Useful Action searches
- Creating a Saved Search

Reporting on Actions

- Methods of reporting
- Alerts & automated reminders

DURATION

1 day

→ [Click Here for Scheduled Dates](#)

DELIVERY MODES

- ✓ Scheduled classes
- ✓ Onsite classes
- ✓ Webinar
- ✓ Presentation

PRE-REQUISITES

TRIM/RM8 Administration
RM8 Searching Expert

CORE COMPETENCIES

- ✓ Planning
- ✓ Creating & Using Actions
- ✓ Action Searching
- ✓ Reporting

BOOK NOW

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Or call **02 8824 4677**
for more information