

HP RM 8 Level 1



Master your HP Record Manager recordkeeping system

OVERVIEW

Develop an understanding of recordkeeping, your obligations and the benefits of using HP Record Manager. This course introduces you to the basic functions of creating, editing, finding and sharing records in HP Record Manager. You will become a proficient end user of the system.

Records Management using HP Record Manager

- Who Needs to Capture What
- Lifecycle of a Record
- HP RM Recordkeeping System
- What is a Business Classification Scheme
- Glossary of Terms

The HP RM Environment

- Opening the HP RM Environment
- HP RM Toolbars
- The Shortcuts Bar
- Right Click Shortcut Menus
- Using the Find Records Pane
- Customising the List Pane
- Working with the View Pane
- Setting up Favourite Records
- Tag and Task
- Get Global Settings

Creating HP RM Records

- Record Types and Metadata
- The New Folder Screen
- Business Classification Titling
- Viewing Scope Notes
- Free Text Titling
- Creating a New Folder
- The New Document Screen
- Creating a New Document
- Dragging and Dropping a Document into HP RM

Finding HP RM Records

- The Search Editors
- Using the Multi-Field Editor
- Using the Boolean Editor
- Refining Search Results
- Wild Card Searching
- Filtering Search Results
- Advanced Searching
- Saving Regularly Used Searches

Working with Existing Records

- Send to HP RM
- Editing Records Online
- Revisions of a Document
- Drag and Drop a New Revision
- Mark as Final for Records
- Creating New Versions
- Creating User Notes

Capturing Email

- Sending an Email from HP RM
- Attaching HP RM Records from MS Outlook
- Cataloguing Emails from Outlook
- Cataloguing a Mail Attachment from Outlook

DURATION

1 day

→ [Click Here for Scheduled Dates](#)

DELIVERY MODES

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

PRE-REQUISITES

None

CORE COMPETENCIES

- ✓ Record Management
- ✓ Creating Records
- ✓ Finding Records
- ✓ Capturing Email

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



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