

# CM9 End User Comprehensive



## Master the Content Manager 9 recordkeeping

### OVERVIEW

Develop an understanding of recordkeeping, your obligations and the benefits of using Content Manager 9. This course introduces the basic functions of creating, editing, finding and sharing records in CM9. You will extend your skills to workflow, security and other advanced functions to become a proficient end user of the system.

#### Records Management

- Who Needs to Capture What
- What is a Business Classification Scheme

#### Content Manager Environment

- The Ribbons, Shortcuts Bar & Right Click Menus
- Customising the Panes
- Setting up Favorite Records

#### Creating Records

- Record Types
- Record Metadata
- Creating a New Folder
- Creating a New Document Record
- Dragging and Dropping a Document into Content Manager

#### Finding HP RM Records

- Using the Search Editors
- Refining Search Results
- Filtering Search Results
- Advanced Searching
- Saving Regularly Used Searches

#### Working with Electronic Documents

- Editing Documents Online
- Revisions of a Document
- Creating a New Version
- Creating User Notes

#### Capturing Email

- Sending an Email from Content Manager
- Check In Emails & Attachments from Outlook

#### Working with Locations

- Location Types
- Finding Locations
- Creating External Locations

#### Security Management

- About Security & Access
- Managing Access Controls

#### Creating Workflow with Actions

- Assigning Actions
- Completing Actions
- Adding Additional Actions

#### Advanced Searching

- Searching by Dates
- Searching by Record Items & Selection Search Style
- Searching by Actions

#### Record Relationships

- Relating Records
- Navigating to Related Records

#### Managing Email

- Setting up a Check In Style
- Check In on Send
- Using Linked Folders in Outlook

#### Reports

- Printing Reports
- Printing Record Labels

#### DURATION

1 day

→ [Click Here for Scheduled Dates](#)

#### DELIVERY MODES

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

#### PRE-REQUISITES

None

#### CORE COMPETENCIES

- ✓ Creating Records
- ✓ Finding Records
- ✓ Capturing Email
- ✓ Workflow & Relationships

**BOOK NOW**

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



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