Content Manager User Fundamentals (CMUF)

ID CMUF   **Price** on request   **Duration** 3 days

Who should attend

The audience includes, but is not limited to: Content Managers, Records Coordinators, senior business staff, power users, Inquiry Users, and/or core project team members.

Prerequisites

To be successful in this course, you should have the following prerequisite skills or knowledge:

- Knowledge of records management principles and internal business processes.
- Basic knowledge of and comfort working with software; including simple keyboard and mouse skills, as well as knowledge of Microsoft Office and other Windows-based programs.
- While there will be some technical discussion throughout the course, a strong technical aptitude or background is not required.

Course Objectives
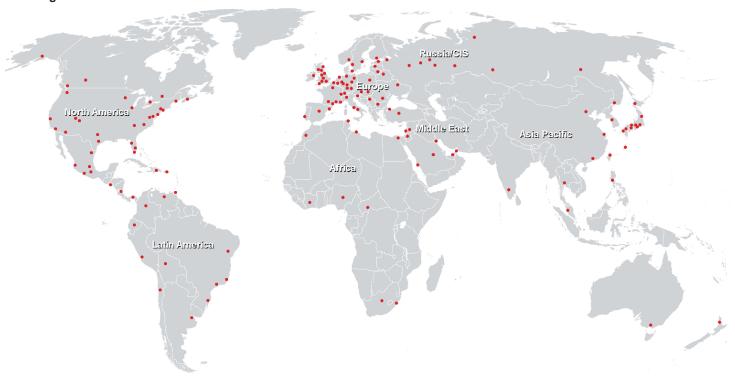
On completion of this course, you should be able to:

- Describe the ECM and the purpose of Content Manager.
- Provide an overview the Content Manager interfaces.
- Use the Search functionality in Content Manager.
- Create records within Content Manager.
- Work with records within Content Manager.
- Edit records and perform document management within Content Manager.
- Work with document queues.
- Provide an overview the Content Manager-MS Outlook integration.
- Use alerts and user labels.
- Explore user customization.
- Work with Office 365 Integration
- Work with the Web client.

Course Content

- Module 1: Course Overview
- Module 2: ECM and Purpose of Content Manager
- Module 3: Overview of the Content Manager Interfaces
- Module 4: Search Functionality in Content Manager
- Module 5: Creating Records
- Module 6: Working with Records in Content Manager
- Module 7: Editing Records (Document Management)
- Module 8: Working with Document Queues
- Module 9: Content Manager Integration with Microsoft Outlook
- Module 10: Working with Alerts, User Labels, and Records
- Module 11: Customizing User Options in Content Manager
- Module 12: Working with Content Manager Web Client

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