

CONTENT MANAGER USING ACTIONS AND PROCEDURES



Course Duration

1 ½ hours

Delivery Mode

Instructor led
Hands-on Training Session

Pre-Requisites

Content Manager
Introduction and
Intermediate

Audience

Suitable for all staff with a
Content Manager license

Overview

This training course provides attendees with an understanding of Content Manager's Actions and Procedures functionality and how it can be used to assist the organisation with business processes and meeting required timelines.

Attendees will learn how to attach actions and procedures to records, access their Records Due, complete and reassign actions, and run overdue action searches.

Topics

- ▶ Overview of Actions and Procedures functionality
- ▶ Attaching actions to records (including adding Notes)
- ▶ Assigning actions
- ▶ Working with the Records Due Tray
- ▶ Completing actions
- ▶ Reassigning actions
- ▶ Running overdue action searches

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