

# CONTENT MANAGER: WORKFLOW CONFIGURATION AND ADMINISTRATION



## Course Duration

2 Days

## Delivery Mode

Instructor led  
Hands-on Training Session

## Pre-Requisites

Content Manager  
Introduction and  
Intermediate

## Audience

Suitable for staff who will be  
responsible for Workflow  
template creation and  
management

## Overview

This training course provides attendees with an understanding of their role in configuring and administering Workflow Templates in Content Manager.

Attendees will learn how to create workflow templates with activities, attach reference documents to workflows, initiate and complete workflow activities, reassign and authorise workflow activities.

Prior to the training, participants will be asked to provide examples of four procedures, that can be used during the training.

This training is most effective with no more than five participants.

## Topics

- ▶ Overview of Workflow functionality
- ▶ Understanding the importance of Business Analysis and Process Mapping
- ▶ How to document processes before configuration
- ▶ Understanding the Workflow Editor
- ▶ Creating Workflow Templates and Activities
- ▶ Attaching reference documents to Workflows
- ▶ Initiating Workflows from a Record
- ▶ Initiating Workflows without a Starting Record
- ▶ Viewing and Completing Workflow Activities Assigned to Me
- ▶ Rolling back, reassigning and authorising Workflow Activities
- ▶ Updating and administering Workflow Templates
- ▶ Running Workflow reports

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