

CONTENT MANAGER

Help Desk



Course Duration

4 Hours

Audience / Roles

Administrators, Help Desk Personnel

Course Objectives

At the completion of this course, attendees will know how to manage, configure and maintain different aspect of the Content Manager systems as required for Help Desk personnel and how to troubleshoot common problems.

Prerequisites

- 📌 Knowledge of Content Manager or Records Management principles
- 📌 Basic Windows PC skills and experience

Course Description

This training course provides Administrators and Help Desk personnel with the knowledge of administration configuration, and how to configure, manage and maintain the key objects within Content Manager. They will gain the knowledge on how to troubleshoot common issues and perform general Administrator tasks.

Course Content

Product Overview

Security

- 📌 Create and configure Security Levels

Locations

- 📌 Create and configure Locations
- 📌 Create, configure and maintain the Locations List

Classifications

- 📌 Understanding Business Classification Schemes
- 📌 Create, modify and delete Classifications
- 📌 Apply security to Classifications

Record Types/Additional Fields

- 📌 Create and manage Record Types
- 📌 Create Record Entry Forms
- 📌 Create Additional Fields and Lookup Sets

User Options

- 📌 User Options in Global Settings

Troubleshooting

- 📌 Office Addins
- 📌 Checked Out Records
- 📌 Security

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