



Document fx

e-Learning

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# Aims and Objectives

## Aims

To help new users to Document fx navigate and work with the Document Management system, search for clients and their documents; add new and existing files and emails.

## Objectives

After attending the course delegates will be able to:

- ✓ Navigate and customise their home page.
- ✓ Use Quick Search for clients and documents.
- ✓ Filter and group documents.
- ✓ Use advanced searching.
- ✓ Add new and existing documents with the appropriate profiling data.
- ✓ Work with documents and the document drive.
- ✓ Managing emails.

## Pre-Requisites

- ✓ Have a working knowledge of Windows software.
- ✓ Be able to use a keyboard and mouse without help.

## Duration

We estimate this course to take a maximum of 90 minutes to complete.

Please remember that our e-Learning courses can also be used as a post-training support tool.