

Precedent Manager for MatterSphere: Introduction

Course Description

A 1-day beginners course for organisations wishing to train key staff in the use of Precedent Manager for MatterSphere.

Staff will learn how to use MS Word to create basic precedent templates by adding and structuring new stop codes and basic field codes from the MatterSphere database.

Learning Outcomes

By the end of the course, attendees will:

- Be able to create new precedents from scratch that conform to current company branding.
- Know how to identify and use specific fields codes that relate to business requirements.
- Have the skills to identify simple issues within existing precedents and perform updates when required by the business.

Course Duration

The course is held over a single day and covers approximately 5 hours of instructor time, excluding breaks and lunch.

Prior Knowledge

- Good skills with MS Word, including Styles and Formatting is required, prior to attending.
- An understanding of your company's processes and documentation requirements is useful, prior to attending.

Course Content

- Overview of Interface
 - Precedent Manager Toolbar
 - Current Document Tab – Useful Buttons
 - Precedent Manager Interface
 - Default system templates
 - Email & Excel Precedents

- Creating, Saving & Editing Basic Precedents
 - Text only templates
 - Basic Stop Codes
 - Paragraph Stop Codes
 - Nested Stop Codes
 - Outlined / Numbered Stop Codes

- Merge Fields
 - Inserting Fields from MatterSphere
 - Copying Fields
 - Delete Fields

Course Delivery Format

The session will be delivered on-site by a Fusion trainer, within your company's on-premise MatterSphere environment.

Training will be hands on, with a mix of instructor led demonstrations and workshop based exercises.