



Capturing and classifying all electronic documents and emails with a simple drag & drop

How much easier can it get?

“Would you like your end-users to be able to capture and classify any electronic document or email simply by dragging and dropping to the desktop?”

If the answer is yes then here is how to do it.

1. Create a shared drive folder called for example, “RecFind_Electronic_Documents”.
2. To make it easier for your staff to use, create an appropriate (low) number of sensible and recognizable sub-folders, for example, “Accounts”, “Human_Resources”, “Contracts”, “Job_Applications”. This allows your staff to select a sub folder most appropriate to their job or project. Please don’t create too many or a bewildering hierarchy; keep it simple. You aren’t creating a classification system with these sub folders, you are creating ‘buckets’ or ‘pigeon-holes’.
3. Using the RecFind 6 add-in product called RecCapture, configure some simple business rules telling RecCapture ‘what-to-capture’ and ‘how-to-classify’ and then point the RecCapture Agent at the new shared folders and click ‘start’. There is no need to create overly-complex classification rules because the RecFind 6 search will enable any user to instantly find any email or electronic document no matter how it is classified by enabling a ‘natural’ search on fields such as author, sender, recipient, date, subject, content, keywords, etc.

4. Tell everyone about the new shared folders and provide staff with simple instructions on using them. For example, create shortcuts on the desktop for those folders each user will use on a regular basis and then show staff how to 'drop' any important documents onto the appropriate shortcut.
5. Once the shared folders and RecCapture are operational tell your staff to begin dragging and dropping electronic documents and emails to the shared folders (shortcuts) on their desktop. They can even use multi-selection to capture and classify a collection of documents or emails in a single operation.

All your staff have to do is drag and drop documents and emails to the most appropriate shared folder. RecFind 6 will then automatically handle the capture and classification; there is nothing else your staff have to do. It is the easiest, fastest and lowest cost way to roll out document management across your enterprise.

RecCapture will automatically capture each new or updated document (a new version) or email as soon as it is added to the new shared folders. It will analyse each one and apply your classification rules while saving it in the RecFind 6 repository. The newly captured electronic documents and emails will be immediately available via the RecFind 6 web client search screens using full text (all words in the document or email plus any attachments), Metadata (e.g., by Author, Sender, recipient, Subject, date sent, date created, etc.) and BOOLEAN search methods.

If you want to further improve the automatic classification process you can use a special feature in RecCapture that recognizes 'tags' (e.g., File number, customer number, contract number, etc.) inserted into documents using templates.

Electronic document management does not have to be difficult, time-consuming or productivity sapping. In fact, if the processes are not really simple, fast and easy to use your staff will refuse to use them. The above approach is about as simple as it can get. This is how you meet your document management and compliance objectives without burdening and annoying your staff with difficult to understand and follow, complex and time-consuming capture and classification processes. End users are not records and document managers, they have their own work to do and they have little interest in learning and applying complex classification processes.

If you make it easy, fast, simple and logical it will work!

This is all doable within a very short timeframe and at negligible expense.

Please talk to us and we will explain and show you how easy it is to use RecFind 6 and RecCapture to fully automate the document capture and classification process.

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Products required: RecFind 6, RecCapture and the RecFind 6 Web Client