



Overview of the RecFind 6 User Interface (UI)

The RecFind 6 User Interface explained

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Introduction

The [RecFind 6](#) client User Interface (UI), as experienced in the *two RecFind 6 clients, is deceptively simple in that it is enormously powerful and infinitively configurable.

**There are two versions of the RecFind 6 client available. A Windows 'smart-client' that is installed on each Windows workstation, and the optional 'web-client' that runs within a web browser without anything needed to be installed on the device.*

The 'smart-client' is for computers running Windows, while the 'web-client' can run on any computer (including Apple Macs) or tablet (e.g., iPad) that has a modern web browser (such as Internet Explorer, Edge, Firefox, Chrome, Safari, etc).

The UI design was governed by four basic principles:

1. That when a change to the UI is made in the [DRM](#) by your RecFind 6 administrator, that it is automatically reflected in both versions of the client (the standard smart-client and the optional web-client). This ensures that both versions of the RecFind 6 client are always identical.
2. That every function in RecFind 6 should work **the same way**, such that if a user learns one function then he/she then knows how to work every function in RecFind 6.
3. That the UI can support any language (configurable in the DRM by your administrator) including all Asian languages and can in fact, support multiple languages concurrently.
4. That the customer can configure any aspect of the UI including language, field captions, sort sequences, table columns, functions available, fields, forms, applications, etc., without any programming being required, just using the functionality of the RecFind 6 DRM.

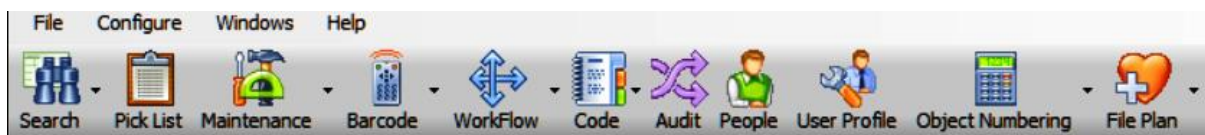
The above four design principles dictated the design and look and feel of the RecFind 6 UI.

Components of the RecFind 6 UI

Toolbars

All the buttons on the RecFind 6 toolbar (e.g., Search, Maintenance) are used to initiate functions (i.e., perform work with data) and are configurable by your RecFind 6 Administrator using the DRM and the RecFind 6 Security System. The RecFind 6 Security Group(s) assigned to you by your administrator, determines what buttons you see on the toolbar and, what buttons are hidden.

Smart-Client



Web-Client



Note that even though the two toolbars have been developed using different tools and technologies, that they provide an almost identical experience such that users can easily move from one to the other without any retraining.

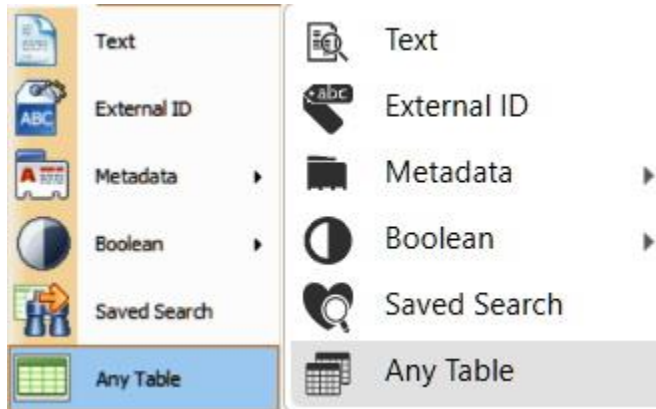
Clicking on a button on the toolbar will produce a series of menus or a screen depending upon the button selected.

Menus

Example, Search function menus.

Smart-Client

Web-Client



All menus are configurable by your administrator using the DRM. Any number of new menu items can be created, and any menu item can be hidden by your Administrator. The menus you see under each function are controlled by your assigned RecFind 6 Security Groups (you can be a member of multiple Security Groups). Identical menus will always appear in both the smart and web clients.

Clicking on a menu item will either produce a list of sub-menus or a screen depending upon the menu selected.

Screens/Lists





Web-client example

Code	Description	Destroy	No Of Periods	Destroy	Destroy Starting
1.1.1 - COMMUNITY RELATIONS -	Records relating to an award, prize or reward sponsored by the agency,	7		Year	Closed Date
1.1.2 - COMMUNITY RELATIONS -	Invitations to sponsor, judge or nominate for awards or prizes, as well as			Calendar	Closed Date
1.10.1 - COMMUNITY RELATIONS - PUBLIC	Complaint / compliment or suggestion registers.	7		Year	Closed Date
1.10.2 - COMMUNITY RELATIONS - PUBLIC	Records relating to client complaints and suggestions which have a				
1.10.3 - COMMUNITY RELATIONS - PUBLIC	Other records relating to complaints and suggestions not covered under	2		Year	Closed Date
1.11.1 - COMMUNITY RELATIONS -	Surveys conducted by the agency of client satisfaction and needs,	5		Year	Closed Date
1.11.2 - COMMUNITY RELATIONS -	Records relating to the provision of information in surveys conducted by	2		Year	Closed Date
1.2.1 - COMMUNITY RELATIONS -	Records relating to celebrations and ceremonies of significant historical				
1.2.2 - COMMUNITY RELATIONS -	Records relating to administrative arrangements for celebrations and	2		Year	Closed Date

RecFind 6 screens are lists of selected data from RecFind 6 tables. The data you can see, the column headings on the screens, the order of the column headings and the sort order of the data, etc., are all configured by your administrator.

Forms

RecFind 6 forms can be configured for any type of data using the DRM. A form contains controls, fields, captions and data. The data displayed can be a field in a table, a field in a linked table or a field value generated by a process. A field can also be conditional on values in other fields. You can have a variety of different field types on a RecFind 6 form e.g., Yes/No, date, date and time, text, notes, numbers, etc. Your RecFind 6 administrator can modify any standard form and can create new forms as required.

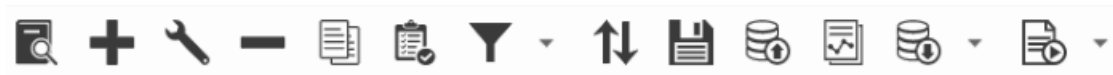
*Security Code	 Unclassified
*eDoc ID	D000068
Attached To File	
*eDoc	
Author	City Council
Abstract	Site Plans and Environmental Impact Studies
Document Type	 ADVICE
*Created Date	Apr 16 2019
Received Date	Apr 16 2019
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*eDoc Name	Statement of Environmental Impact Farmers Market.pdf
Size	28.27 KB
*Status	 Published
Delegate	

Functions



Smart-Client

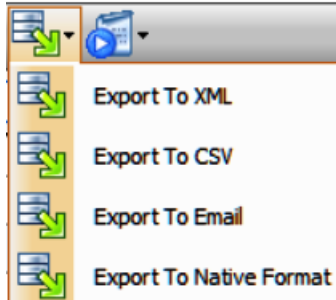


Web-Client



The Buttons displayed in the above toolbars initiate functions (to work with data) and are configured by your administrator. The buttons you see are controlled by your Security Group(s). For example, you may have Add and Modify but not Delete. The above toolbars show the administrator's view, with all buttons visible and all functions available.

There are two ways to utilize a function, you either first select the data in the screen you wish to process (e.g., all or a multi-selection) and then select a function, e.g., **Modify**  or you select the function first, e.g., **Add**  and then enter the required data. Some functions have sub-functions. For example, Export has four sub-functions for you to select from:



To export, you first search for then select the data you wish to export. You then you click Export and then select a sub-function, e.g., Export to Native Format.

Function:

View – (or double click an item)

Smart-Client



Web-Client



Add an item



Modify an item or a selection of items (bulk modify)



Delete an item or a selection of items



Clone - make a copy of an item



Search - Text, External ID (name), Metadata, Boolean, Saved, Any table



Sort the items in the list



Print all items in the list or a selection of items using a saved report format



Export – items as XML, CSV, Mail or native format



Add items to Pick List (user's workspace)



Check Out one or more electronic documents



Bulk Check In of electronic documents from local or shared drives



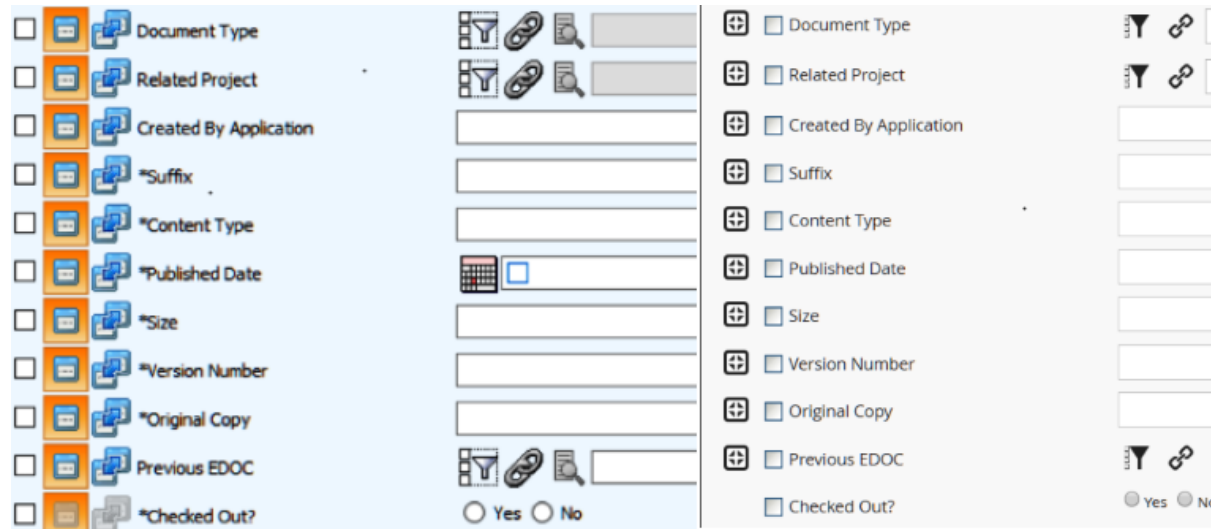
Process – run a third-party application using the data in the result set in the screen



Controls

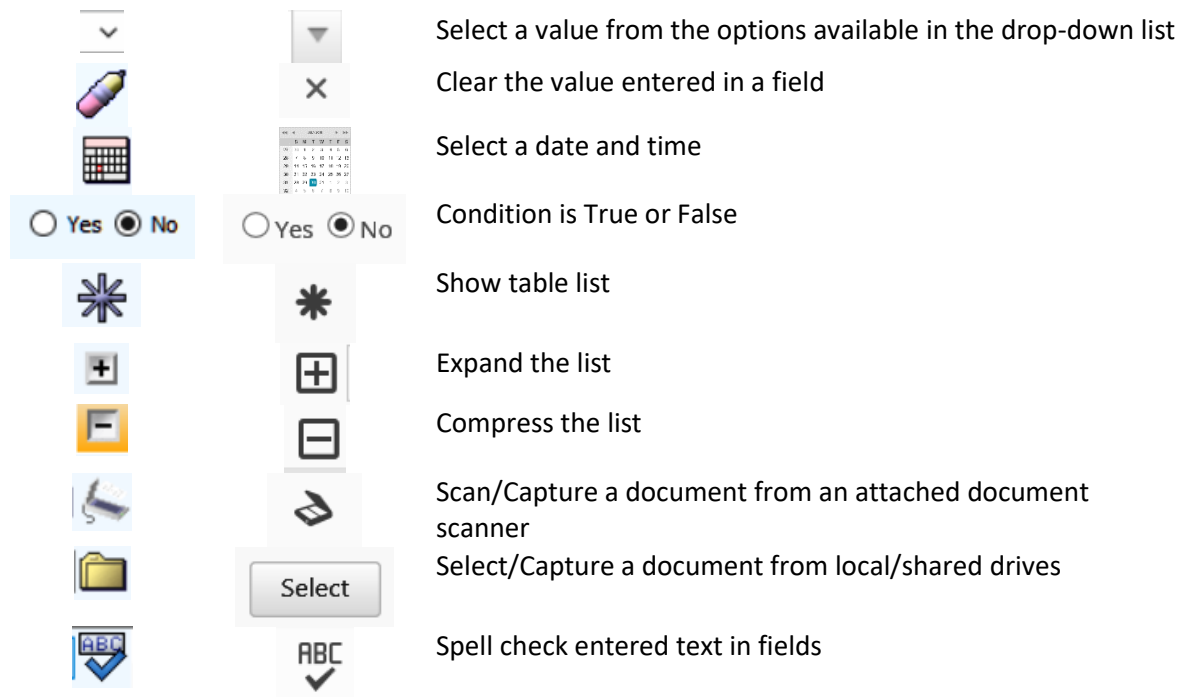
Smart-Client example

Web-Client example



The controls you see down the left side of screens are extensions to functions. They, for example, allow you to configure the required parameters of a search.

Smart-Client	Web-Client	Description
<input type="checkbox"/>	<input type="checkbox"/>	Do not search for this field
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Find records that have the value entered in this field
<input type="checkbox"/>	<input type="checkbox"/>	Do not find records that have the value entered in this field
		Find records that have the single value in this field
		Find records that have a matching a range of values to these fields
		Filter/Restrict the search results based on a value in a linked table
		Select a record from a linked table



Summary

The RecFind 6 UI is powerful, easy-to-use, totally consistent across all functions and infinitely configurable to the unique requirements of each set of users (each Security Group) in your organization.

The secret to the RecFind 6 UI is the RecFind 6 DRM, the high-level tool provided free with every copy of RecFind 6 that allows your administrator to change almost anything in RecFind 6 without programming and without negating the ability of your copy of RecFind 6 to receive and apply our standard updates and new releases. New releases can be installed using our installation program in a matter of minutes, not weeks or months or years like some of our competitors. This is a major convenience and cost-saving benefit of the unique architecture of RecFind 6.

The same UI works on desktops, laptops and tablets. The web-client version of the UI will for example, automatically scale to the device you are using, e.g., an iPad. It works on Windows, Linux, Mac OS, iOS and Android. However, **we do not recommend** using RecFind 6 on smartphones because typically the amount of data involved, and toolbar design are incompatible with a small screen size.

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