

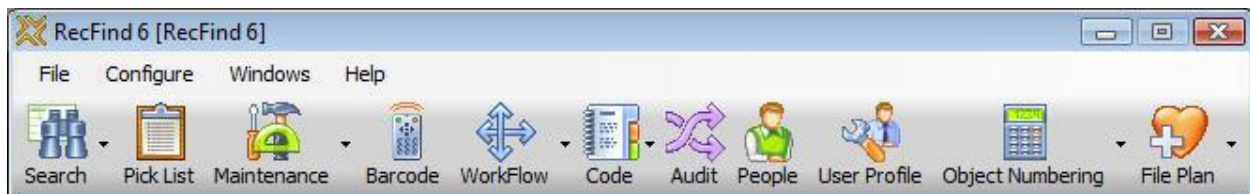


Overview







The world's easiest to use and most powerful records and document management solution

Both a cloud & an In-house solution

RecFind 6 is a fully complaint Microsoft .NET application with both a 'smart' and 'web' client. It was designed from the outset to be run in the Cloud but can also be run in-house on your own servers.



Icons/Methods used throughout RecFind 6

-  View selected item(s)
-  Add a new item
-  Modify an item
-  Delete an item
-  Clone an item
-  Request an item



Move an item



Create a new part for an item



Pick List



Search within list by filters



Sort a list of items



Reports



Export

RecFind 6 is a complete solution for any organization needing a records and document management solution. The standard product includes all the functionality you will ever require including:

Search

- Full text, Metadata, Range, BOOLEAN and Saved Searches
- Search across all objects (e.g., file folders, document profiles, archive boxes, electronic documents, etc) with a single search

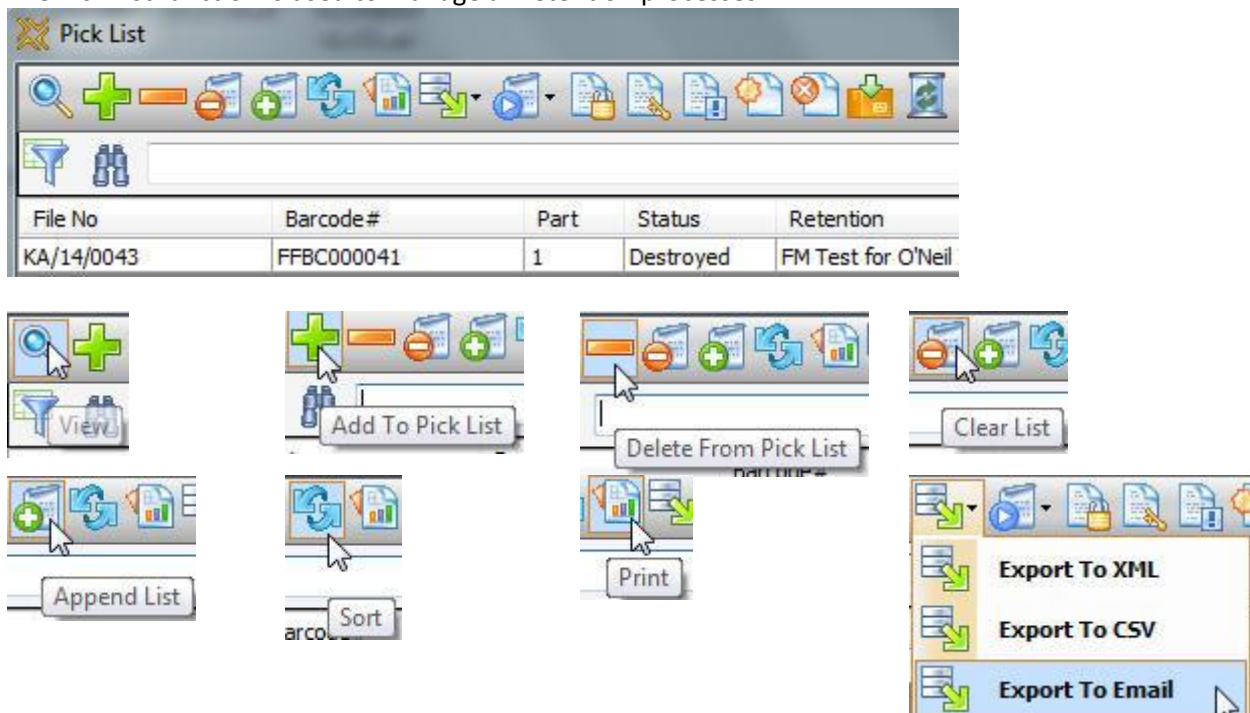




Retention

- Including multiple options for managing retention such as by a File Plan, Manually, by File Title and Series
- Also includes the ability to apply Legal Citations.
- Includes multiple Hold functionality
- Vital Record review and maintenance
- Can be applied to all objects, e.g., file folders, documents, electronic documents, archive boxes
- Use powerful report writer to produce any report required

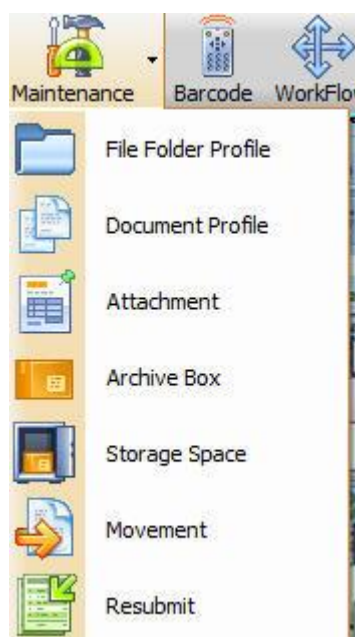
The Pick List function is used to manage all retention processes.





Maintenance

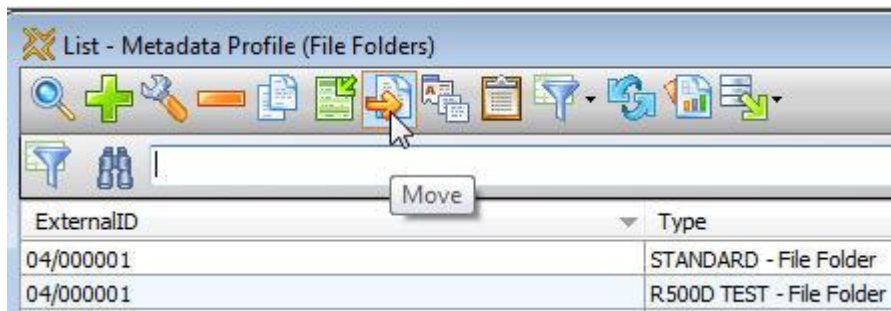
- Add, Modify, Delete, View all objects



List - Metadata Profile (File Folders)		
ExternalID	Type	Description
04/000001	STANDARD - File Folder	use this file folder as the object
04/000001	R500D TEST - File Folder	use this file folder as the object
04/000002	STANDARD - File Folder	steven michael kevin

Movement Tracking

- In the R6 client and using both fixed and portable barcode readers
- RecFind 6 works with the latest technology Datalogic memo portable



Barcode Reader

Select barcode reader transaction file

A ☐ Census
File Folder Movement By AO

B ☐ Census
File Folder Movement By Location

C ☐ Census
Document Movement By AO

D ☐ Census
Box Movement By Location

E
Box Contents Census

F
Move Files To Box And Make Inactive

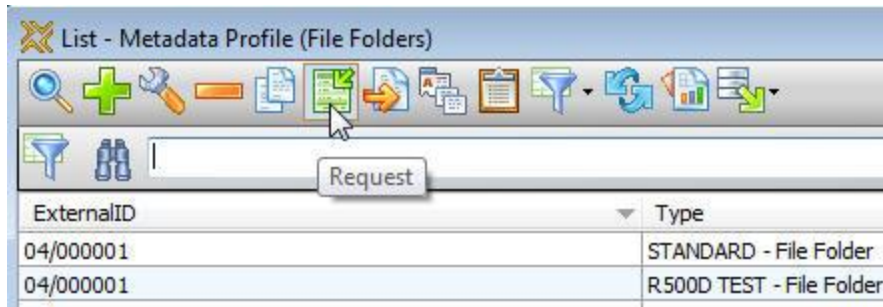
G
Remove Files From Box And Make Active

H ☐ Census
Box Movement By Space



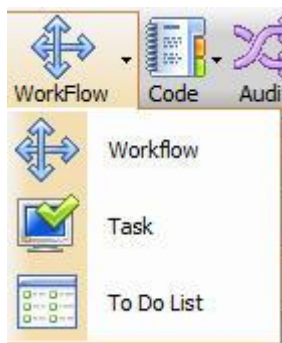
Request/Resubmit Management

- Manage all requests for items managed by RecFind 6.
- Automatically cancel outstanding requests when an item is moved to the requestor



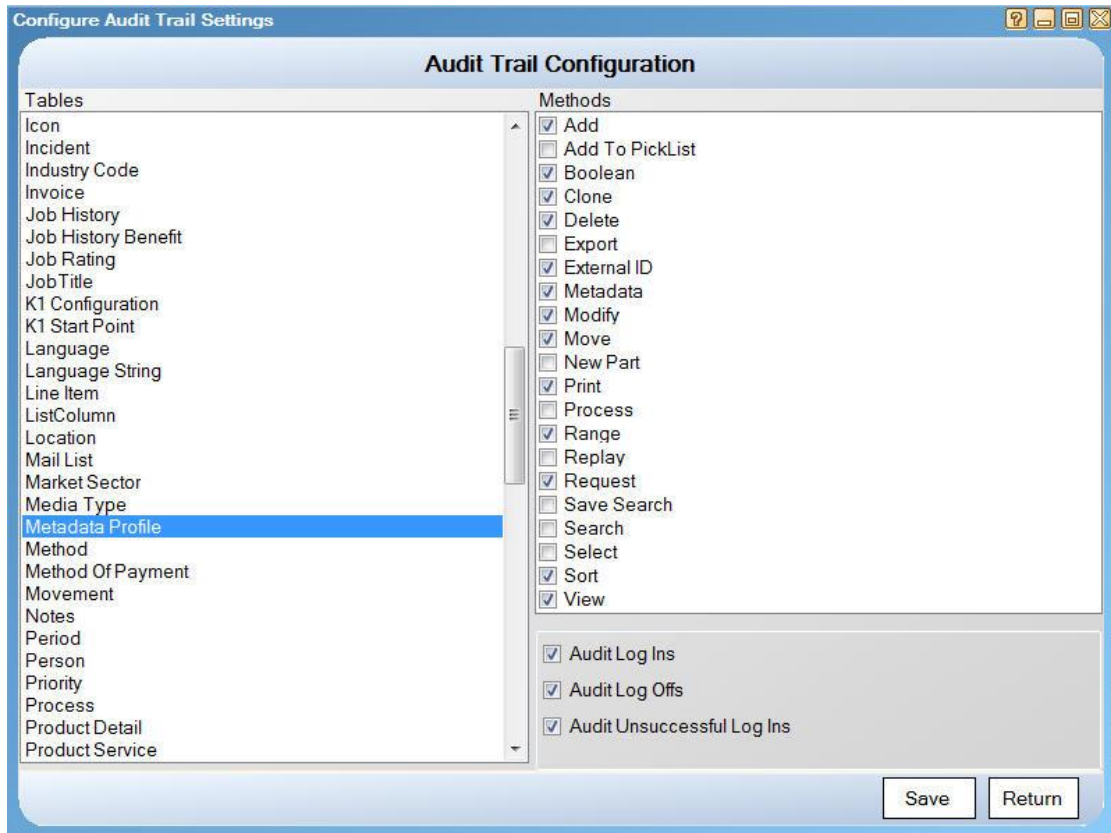
Workflow

- Highly configurable, supports parallel and serial operations plus templates and 'halt and restart at another step' functionality
- Includes 'ToDoList' function so each user can quickly see all work due for any day



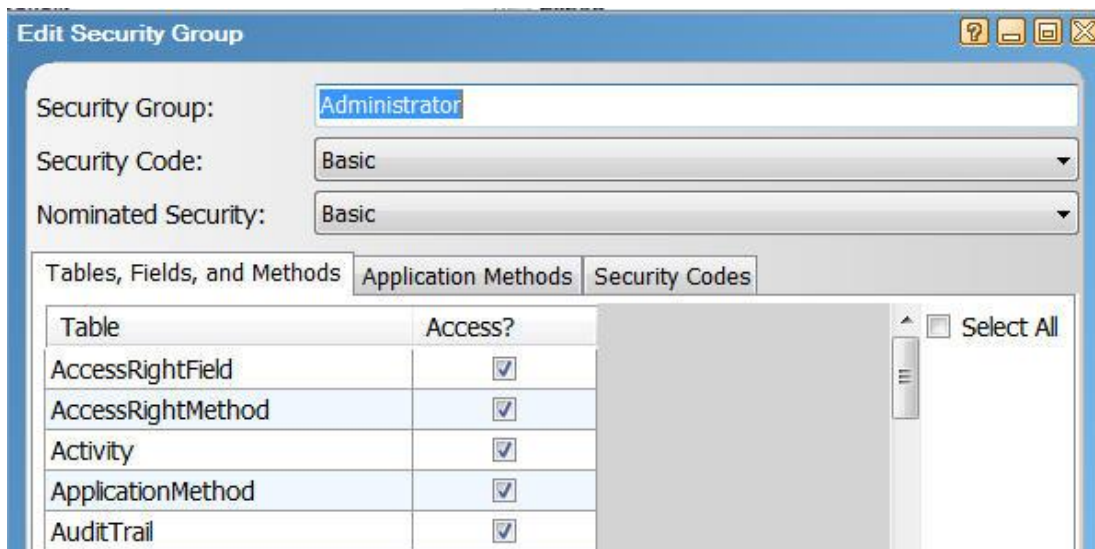
Audit Trail

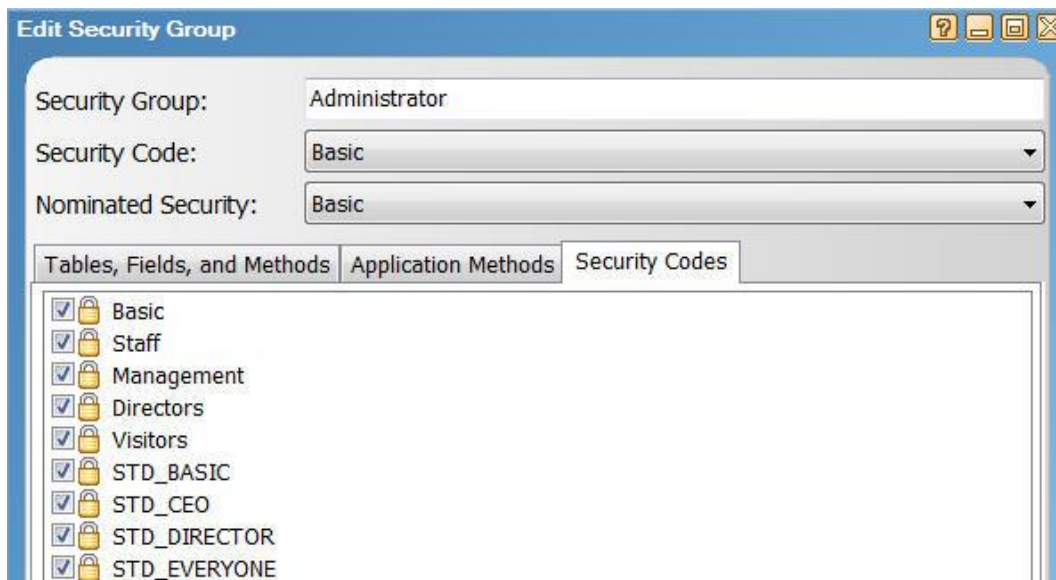
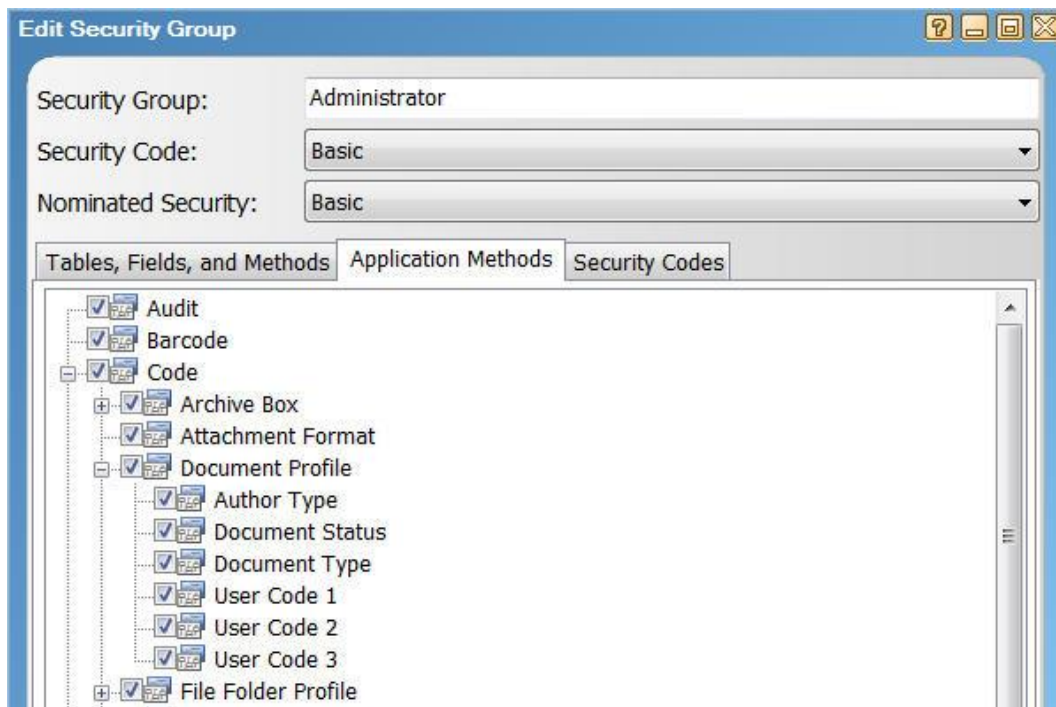
- Fully configurable



Sophisticated security system

- Integrate to Active Directory
- Down to the field level
- Control access to all objects





Auto Numbers

- Ability to configure auto numbers and multiple sequences to any field

Configure Auto Numbers

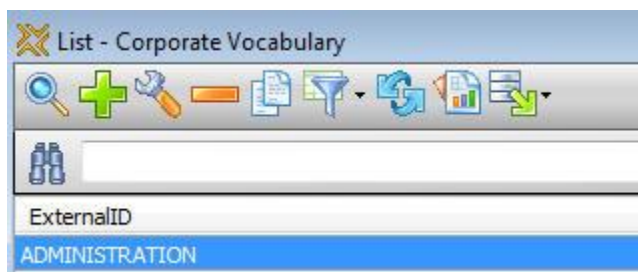
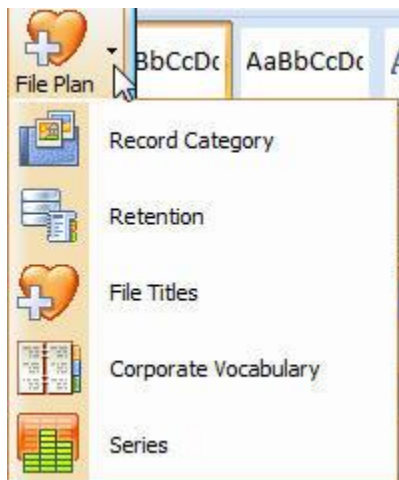
ExternalID	Associated Field(s)
Incident Format Number	Incident.ExternalID
R500D TEST - Document Profile Number Auto Format	MetadataProfile.ExternalID (R500D TEST - Document Pro...
R500D TEST - File Folder Number Auto Format	MetadataProfile.ExternalID (R500D TEST - File Folder)
STANDARD - Document Profile Number Auto Format	MetadataProfile.ExternalID (STANDARD - Document Profile)
STANDARD - File Folder Barcode Number Auto Format	MetadataProfile.Barcode (STANDARD - File Folder)
STANDARD - File Folder Number Auto Format	MetadataProfile.ExternalID (STANDARD - File Folder)

Configure Multiple Sequences

ExternalID	Title1Text	Title2Text	Title3Text	Title4Text
AEB	ADMINISTRATION	ENGINEERING PRO...	BIG PROJECTS	
AEL	ADMINISTRATION	ENGINEERING PRO...	LITTLE PROJECTS	
AMB	ADMINISTRATION	ASSET MANAGEME...	BIG ASSETS	
AML	ADMINISTRATION	ASSET MANAGEME...	LITTLE ASSETS	

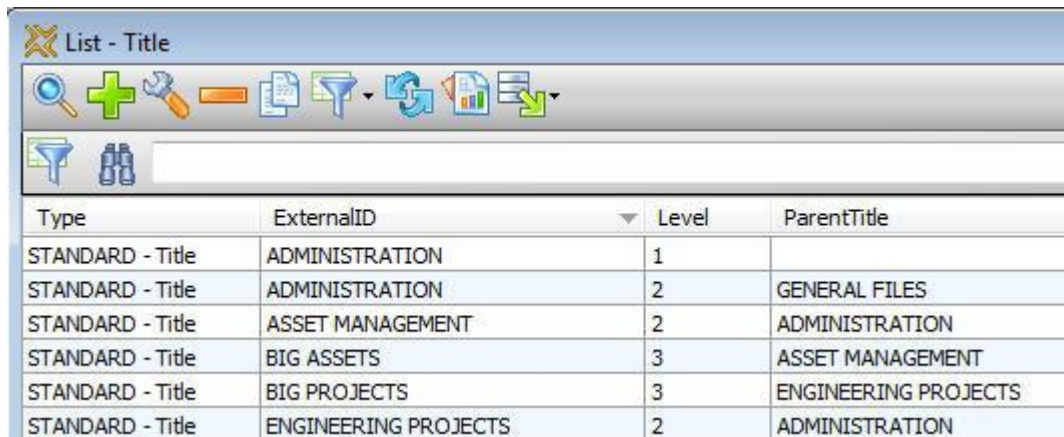
Corporate Vocabulary/Keyword Thesaurus

- Include all your classification terms and relationships
- Maintain multiple Thesauri



File Titling

- With multiple options, e.g., linking to file numbers and retention codes
- Draw terms from the Corporate Vocabulary/Keyword Thesaurus and/or use free text terms

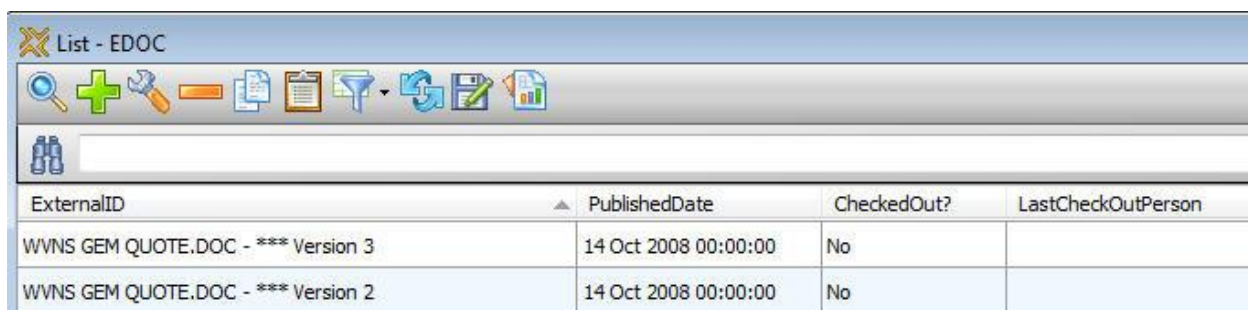


The screenshot shows a window titled "List - Title" with a toolbar containing icons for search, add, edit, delete, and other file management actions. Below the toolbar is a table with the following data:

Type	ExternalID	Level	ParentTitle
STANDARD - Title	ADMINISTRATION	1	
STANDARD - Title	ADMINISTRATION	2	GENERAL FILES
STANDARD - Title	ASSET MANAGEMENT	2	ADMINISTRATION
STANDARD - Title	BIG ASSETS	3	ASSET MANAGEMENT
STANDARD - Title	BIG PROJECTS	3	ENGINEERING PROJECTS
STANDARD - Title	ENGINEERING PROJECTS	2	ADMINISTRATION

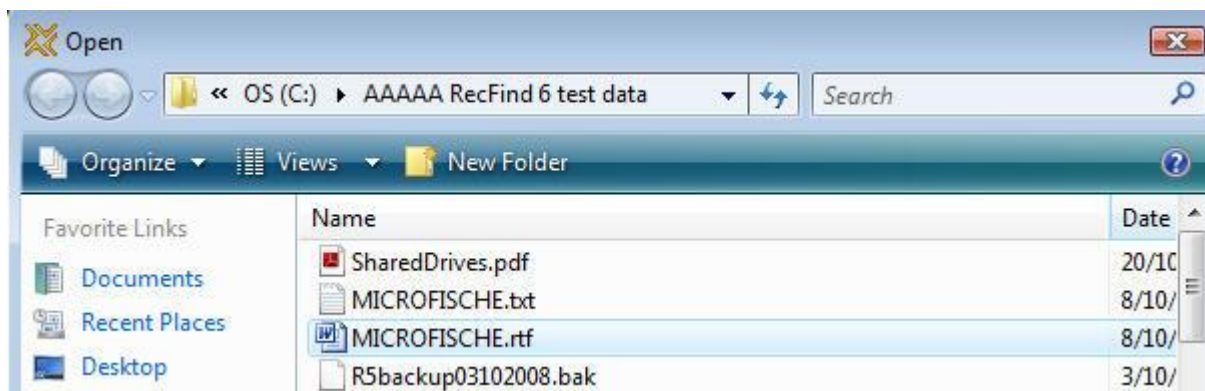
Electronic Document Capture

- Easily capture, index and store eDOCs of any type
- Automatic version control



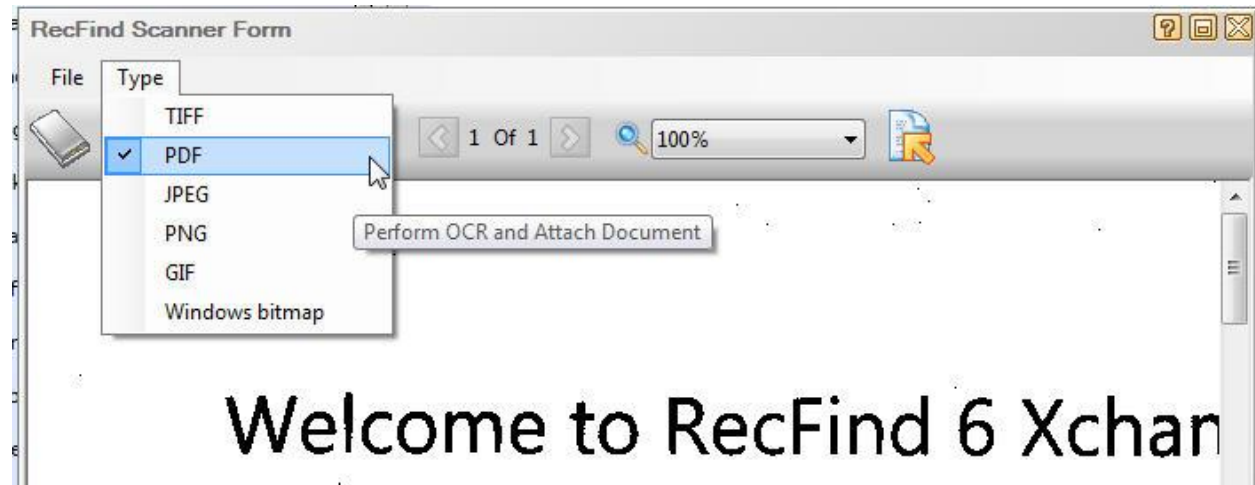
The screenshot shows a window titled "List - EDOC" with a toolbar containing icons for search, add, edit, delete, and other file management actions. Below the toolbar is a table with the following data:

ExternalID	PublishedDate	CheckedOut?	LastCheckOutPerson
WVNS GEM QUOTE.DOC - *** Version 3	14 Oct 2008 00:00:00	No	
WVNS GEM QUOTE.DOC - *** Version 2	14 Oct 2008 00:00:00	No	



Imaging

- Works with any TWAIN compatible scanner
- Includes standard functionality to convert TIFF images to text and PDF format



Standard Reports

- A full set of standard reports plus the functionality for you to be able to modify any standard report and create new standard reports

Report Writer

- Fully featured in-built report writer

Saved Reports

- Easily save and reuse any report

Clone

- Easily 'copy' any existing record for rapid data entry

Export

- Easily export any record or record set in either XML or CVS format

Email

- Easily email any record or record set

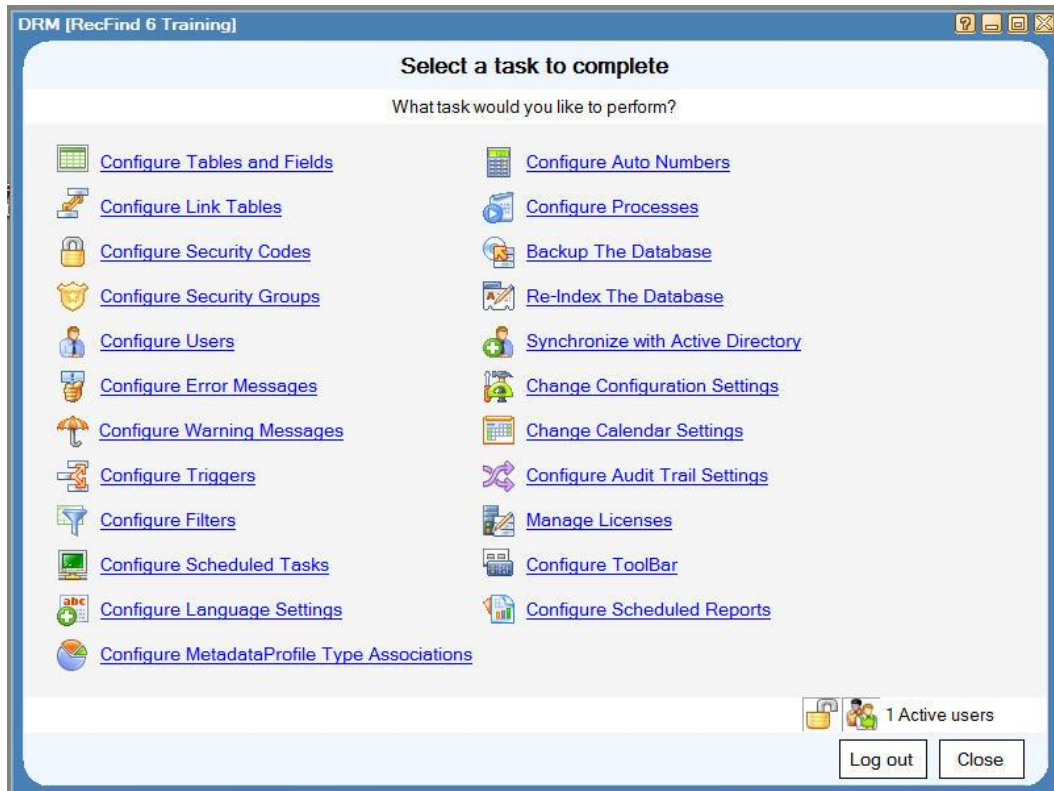
Global Change

- Select any record set and apply global changes

Administrator Tools

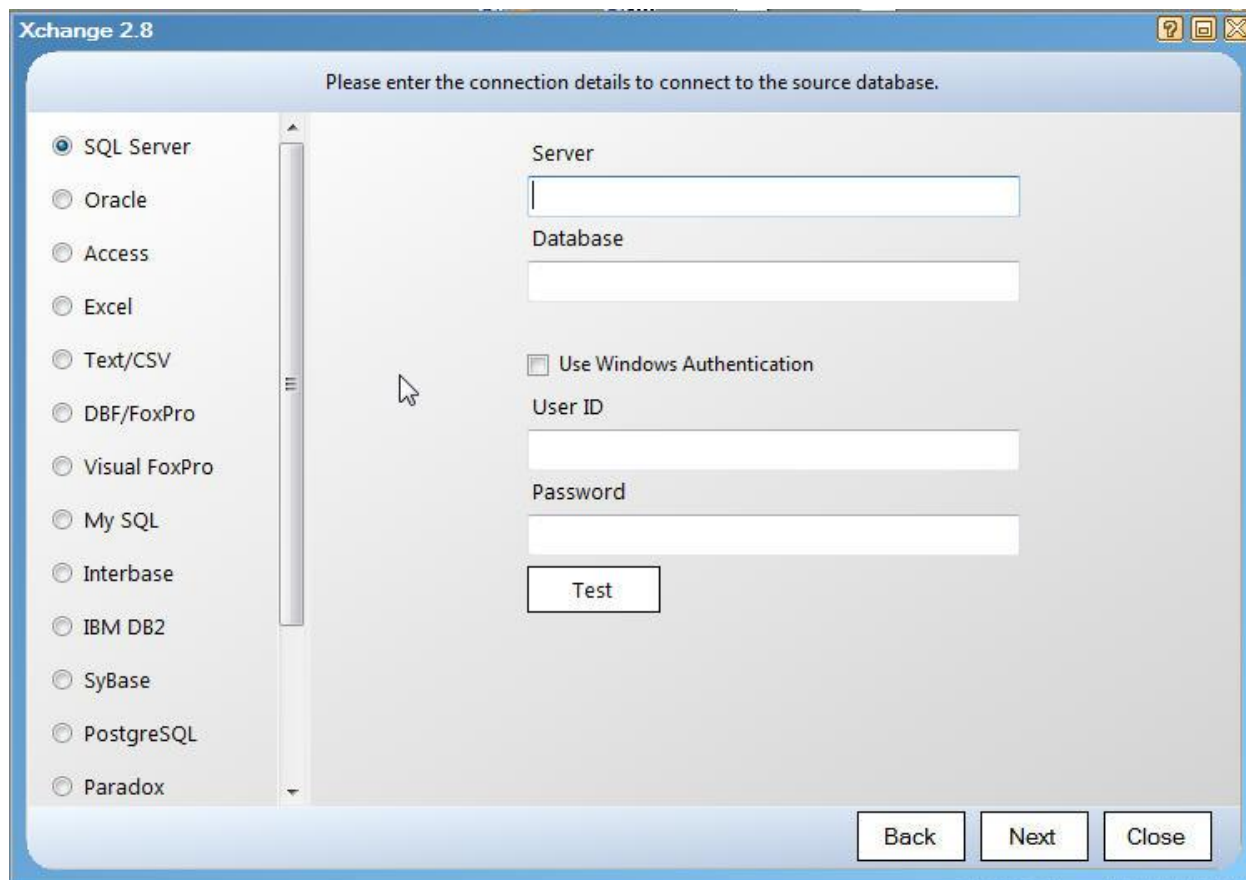


The DRM is used by the RecFind 6 Administrator to make changes to the RecFind 6 Data Model and any process within RecFind 6.



Xchange is the Import/Export engine for RecFind 6. You can use Xchange to import data from any source and populate any table within RecFind 6. You can also use Xchange to export any RecFind 6 data in industry standard XML format.

Xchange also works with our High Speed Scanning Module (HSSM) to take data captured during forms processing and then automatically populate RecFind 6 tables.



Add-on Products



The RecFind 6 Button is a small check-in/check-out application that runs both in your SysTray and in the toolbar of MS Office products such as Word, Excel, PowerPoint and Outlook. It also runs in Adobe Professional.

It is the ideal low cost way to eDOC enable users who do not require a full RecFind 6 client license. Its functionality includes search, check-in, check-out and document scanning. It is the ideal light-weight, inexpensive app for most of your staff.



The High Speed Scanning Module (HSSM) is specifically designed to automate the scanning process for customers with large amounts of paper to scan and capture. It includes two products.

DocScan

Interfaces to any TWAIN compatible scanner and uses barcodes to recognize individual documents in a bulk document feed. Includes functionality to OCR captured TIFF files and convert them to indexable PDF documents. Also includes configurable forms processing functionality.

RecScan

Is used to capture the output from DocScan (or any other imaging program) and automatically add documents to the RecFind 6 database. During this automatic process you can also choose to add classification and retention information.



GEM is a new generation, fully-automatic, rules-driven email management and archiving system. GEM attaches directly to your email server and analyzes all incoming and outgoing emails against your rules. It then classifies and adds all required corporate emails to the RecFind 6 database.

The major advantages of GEM are that it monitors and analyzes all emails in a 100% consistent manner and your staff do not have to do anything, all emails that should be captured are captured and made available to all RecFind 6 users (subject to the security regime you have implemented).

GEM works with any email system, including Gmail and Office365 that support IMAP.



RecCapture is a new generation, fully-automatic, rules-driven electronic document management system. RecCapture deploys 'agents' across your shared drives/folders and automatically analyzes, captures, classifies, versions and stores electronic documents in the RecFind 6 database.

The major advantages of RecCapture are that it monitors and analyzes all eDOCs in a 100% consistent manner and that your staff do not have to do anything, all eDOCs that should be captured are captured and made available to all RecFind 6 users (subject to the security regime you have implemented).



The RecFind 6 Mini-API creates links from an existing application to any object stored within RecFind's data repository. You can integrate any application to RecFind 6 using the Mini-API.

It is a way to 'image-enable' any other application using RecFind to capture and store all required electronic documents and images. It is also a way to access and view the Metadata of physical documents/containers such as paper, file folders and archive boxes where that Metadata is stored in RecFind.

RecFind 6 SDK

The RecFind 6 SDK has an array of methods that allow you to perform such operations as adding, modifying, deleting records, uploading and downloading electronic documents, retrieving lists of records using searches, and more - all while conforming to RecFind 6's advanced security system.

With this functionality available, you will be able to:

- Easily integrate with existing systems and pass data between them and RecFind 6.
- Change or enhance existing products with different user interfaces that suit your organization.
- Design third party applications to extend and support our many usages (CRM, BPM, Asset Management, HR, etc.).

Sharepoint-Integration

The RecFind 6 SharePoint Integration Tool was designed specifically to incorporate RecFind 6's powerful EDRMS functionality with SharePoint. The marriage of the two products brings RecFind 6's fully featured electronic document and records management system with functionality like workflow, imaging, full text searching, e-mail management, Outlook, Exchange, portable barcode reader support, offsite storage management and retention to your SharePoint farm.

Easily transfer information to and from SharePoint.

Web-Client

The RecFind 6 web client replicates the functionality of the RecFind 6 smart-client. However, unlike the smart-client the web client does not require any software to be installed on the workstation and neither does it require the .NET Framework to be installed on the workstation.

The web client runs inside multiple browsers and on multiple operating systems like Windows, Apple OS, iOS, Android, etc.

Technology

RecFind 6 was built using Microsoft Visual Development Studio. It utilizes the Microsoft 'smart-client' technology such that any RecFind 6 client can be deployed to work across your network (ADO) or across your Intranet/the Internet (Web Services). As such, any RecFind 6 client can be installed either as a traditional 'fat client' or 'thin client' product. It is a 100% .NET application based

RecFind 6 also includes an optional 'thin' or web client with the same functionality as the smart client and that runs inside most common browsers (e.g., IE, Chrome, Safari, Edge, etc.). As a browser-based client it is relatively OS independent and happily runs on Windows, Apple OS, iOS, Linux, etc.

RecFind 6 connects to data sources using .NET connection strings (it does not use ODBC).

RecFind 6 utilizes iFilters for full text indexing of electronic documents.

Prerequisites

- Windows Server 2008 and above
- Windows 7 and above
- SQL Server 2008 and above
- .NET Framework 4.5

Please click on the following link for a more detailed list of RecFind 6 prerequisites:

[RecFind 6 Prerequisites](#)

