

RecFind 5 Active Training Course

Duration: 1.5 days

Cost: these courses are conducted onsite. Please contact your account manager or the K1 training department for a quote.

Overview

This course has been designed for records staff, administrative assistants and all those associated with the creation and management of records and information.

Pre-requisites

Course delegates must have prior knowledge of records and information management concepts and an understanding of the windows environment.

Course Content

File Folder Maintenance

- Maintaining file folders
- Creating new parts to files
- Creating a foreign file folder
- Cloning a file folder

Document Maintenance

- Maintaining document profiles
- Working with loose and attached documents
- Selecting a document
- Cloning a document

Imaging and Electronic Document Maintenance

- Working with images
- Working with electronic documents
- Version control
- Using check-in and check-out with the RecFind Button
- Dragging and dropping documents into RecFind

Continued ...

Searching

- RecFind searching principals
- Searching for file folders
- Searching for documents
- Using document check-in/check-out
- Searching for electronic attachments
- Global searching
- Using the To Do function

Resubmits

- Managing resubmits
- Using RecFind's calendar facility
- Email notification of a resubmit

Movements

- Moving files and loose documents
- Interrupting a file folder movement
- Completing a resubmit
- Email notification of a file or loose document

Using Barcode Readers with RecFind

- Using the fixed barcode reader
- Using the portable barcode reader for file audits

Picking Lists

- Maintaining the Pick List
- Printing labels from the Pick List
- Appending to the Pick List
- Adding an item to the Pick List from another module

Reporting and Report Writer

- Printing standard reports and labels
- Creating customised reports using the RecFind Report Writer

Workflow Management

- Managing workflow by adding, modifying, reporting and tracking individual actions or groups of actions
- Workflow email notification

Standard Correspondence Management

- Creating and managing standard reply letters and action sheets

