

## RecFind 5 Administrator 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 is designed for management and personnel who are responsible for the implementation and maintenance of RecFind and related company procedures.

### Pre-requisites

Course delegates must have completed the RecFind Active training course.

### Course Content

#### Database Management

- Adding a new database
- Modifying, deleting and viewing a database
- Changing databases within RecFind

#### Security

- Adding a new privilege function
- Assigning, adding and modifying security codes
- Changing security levels

#### File and Document Number Formats

- Establishing a file number format
- Multiple sequence configuration

#### Keyword Thesaurus and File Titling

- Configuring the keyword thesaurus

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- Standard file title configuration
- Using the synchronize function
- Importing or exporting the thesaurus

### File Number Change and Foreign Files

- Working with foreign files
- Changing the file number

### Configuration

- Email enablement
- Barcode options
- Date validation
- User help
- File Capture Filter
- Other options

### Master Picking List

- Maintaining RecFind's master picking list

### Label Configuration

- Creating labels
- Label configuration options

### Codes Maintenance

- File codes
- Document codes
- Organization codes
- Configuring the calendar
- Configuring file and document prompts

### Workflow Configuration

- Configuring procedure sets and action types
- Linking procedure sets to document types

### Indexing, Audit Trail and Information Purge

- Setting indexing and search options
- Configuring and using the audit trail
- Purging file, document and box records
- Asynchronous Indexing Module (AIM)

### Service Packs

- Downloading and installing RecFind service packs

