

RecFind 6 Administrator Training Course

Duration: 2 days

Overview

This course is designed for management and personnel who are responsible for the implementation and maintenance of the RecFind 6 application and related company procedures.

Pre-requisites

Course delegates must have completed the RecFind 6 User training course.

Course Content

Responsibilities of the Administrator

- Overview of the expectations and responsibilities of the RecFind 6 Administrator

Logging on to the DRM

- Accessing the DRM
- Navigating the DRM
- Saving changes and re-loading the RecFind 6 application

Activating the RecFind 6 Application

- Activating RecFind 6
- Managing RecFind 6 licenses

Database Backups

- Creating a manual database backup

Continued ...

Integrating with Active Directory

- Extracting information from Active Directory
- Configuring the People and Users tables after integration

Security

- Overview fo the importance of Security Levels
- Configuring Security Groups
- Adding Users to Security Groups
- Applying security throughout the RecFind database

Adding New Users

- Adding new Users manually
- Adding new Persons

Configuration Settings

- Configuring session time-outs
- Configuring automatic logins
- Configuring working/non working days
- Configuring records displayed on search results

Calendar Configuration

- Adding non working days

Audit Trail

- Configuring tables and fields for auditing
- Running Audit Trail reports
- Exporting records from the Audit Trail

Indexing

- Overview of I-Filters
- Indexing within SQL
- Re-indexing the RecFind 6 database

Numbering Formats

- Configuring numbering formats for objects such as files, documents, EDOCS, assets and boxes
- Multiple Sequences
- Linking Multiple Sequences to File Titling
- Creating barcoding sequences

Tables

- Modifying an existing table
- Adding a new table
- Assigning table security

Continued ...

- Assigning table methods
- Assigning an icon
- Configuring default sorting orders
- Configuring record types and type dependency
- Configuring fields displayed on search listings

Fields

- Modifying existing fields
- Adding new fields to a table
- Type dependant fields
- Field attributes
- Formatting fields for URLs, phone numbers and email addresses
- Making fields mandatory or read only
- Linking mutiple sequences
- Linking autofills

Filters

- Configuring data filters

Business Logic

- Configuring Stored Procedures
- Configuring Triggers
- Configuring Scheduled Tasks

Error Messages

- Adding/Modifying error messages

Warning Messages

- Adding/Modifying warning messages

Processes

- Adding/Modifying processes

Codes

- Adding/Modifying File Folder codes
- Adding/Modifying Document codes
- Adding/Modifying Archive Box codes
- Adding/Modifying Organization codes
- Adding/Modifying Vital Record codes
- Adding/Modifying Media Type codes
- Adding/Modifying Attachment Format codes
- Adding/Modifying Supplemental Markup codes

Corporate Vocabulary

- Overview of the use of Corporate Vocabulary
- Adding/Modifying Corporate Vocabulary

Continued ...

Record Categories

- Overview of the use of Records Categories
- Adding/Modifying Records Categories

File Titling

- Overview of the use of File Titles
- Adding/Modifying File Titles
- Creating File Titling hierarchies
- Linking Archiving/Retention schedules to File Titles

Archiving/Retention Schedules

- Overview of the use of Archiving/Retention Schedules
- Adding/Modifying Archiving/Retention Schedules

Series Codes

- Overview of the use of Series Codes
- Adding/Modifying Series Codes

Language Codes

- Overview of the use of Language Groups
- Adding/Modifying Language Groups
- Linking language Groups to Users

Configuring Boolean Searches

- Overview of the Boolean principles
- Creating a Boolean search
- Saving a Boolean search
- Replaying a Boolean search