

RecFind 6 User Training Course

Duration: 2 days

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

- Creating and managing physical and electronic file folders
- Creating new parts for files
- Cloning file folders for faster input of multiple files
- Working with many different file types
- Modifying information on multiple files simultaneously

Document Maintenance

- Creating and Managing document profiles
- Working with loose and attached documents
- Moving documents between files

Imaging and Electronic Records

- Capturing and storing electronic records
- Scanning and OCRing physical documents and converting them to PDF
- Version Control for electronic records
- Linking electronic records to a file folder or document profile
- Using the RecFind 6 Button to capture electronic records
- Checking in and checking out documents from the database using the RecFind 6 Button

Continued ...

Searching

- Searching and locating any business record
- Searching for specific text or specific phrases
- Searching on any field within RecFind 6
- Filtering the search to locate records
- Building complex search queries to assist your records staff in locating records
- Saving search criteria for repeat searching

Barcode Readers

- Using a fixed barcode reader to assist with tracking and archiving
- Introduction to all of the capabilities of the portable barcode reader
- Downloading information into RecFind 6

Requesting Business Records

- Managing requests/resubmits
- Implementing email reminders

Tracking Records

- Updating movements of physical records around the organization between people or locations
- Reviewing historical movement information
- Using barcodes to assist in registering movements

Pick List

- Maintaining the Pick List
- Appending the Pick List to other users
- Creating labels and reports from the pick list

Workflow Management

- Managing the To-Do list
- Creating and modifying tasks
- Email notification

Reporting

- Running standard reports
- Modifying standard reports
- Exporting information to Excel or XML format
- Emailing reports directly from within RecFind
- Constructing new report templates

