

RecFind Inactive Training Course

Duration: 1 day

Overview

This training course is designed for management and personnel who are responsible for the retention and disposal of information.

Pre-requisites

Course delegates must have completed the RecFind Active training course and have a sound knowledge of records management. Delegates must also have experience in using the RecFind Thesaurus and Codes modules, or have completed the Administrator course.

Course Content

Disposal/Retention Schedule Management

- Creating a disposal/retention schedule
- Adding retention, citation and series codes
- Linking the disposal/retention schedule to the thesaurus

Introduction to RecFind Box and Storage Maintenance

- Creating and managing records centers
- Adding, modifying and deleting boxes

Retention of Files, Documents, Boxes and Other Contents

- Closing files and documents
- Moving files and documents to intermediate storage
- Archiving or destroying files, documents and boxes

Using Barcodes for Archiving

- Using barcodes for archiving files and documents
- Using barcodes for tracking boxes
- Using barcodes for space management

Continued ...

RECFIND INACTIVE TRAINING COURSE

Box Movements

- Moving boxes to an Action Officer or to a records center
- Moving boxes via a barcode reader
- Viewing box movement history

Retention Specific Searching

- Searching box contents
- Searching for records center information including space number and free space searching

Retention Specific Reporting

- Printing a range of standard retention specific reports including box contents lists

Codes Maintenance

- Creating and implementing retention specific codes including disposal schedule series and citations

Thesaurus - Retention and Disposal

- Automatically assigning disposal/retention authority to a file or a document by linking keyword thesaurus terms to a series or disposal/retention codes
- Assigning disposal/retention codes to a document

Variable Box Labels

- Creating your variable box labels
- Modifying, deleting and viewing existing box labels



Quality
Endorsed
Company
ISO 9001:2000
Lic No.
QEC 5844