



## **WHITE PAPER**

OBTAINING A BETTER RETURN ON INVESTMENT (ROI) FROM  
YOUR KNOWLEGEONE CORP PRODUCTS



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OEC 5844

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# Obtaining a Better Return on Investment (ROI) from your Knowledgeone Corp products

## RecFind

### *Overview*

Almost every time I visit with a customer I discover that there are 'issues' that haven't been reported and there are things they would like to do (that RecFind does eminently well) but they are not aware of the RecFind features that can actually handle the work.

These two things alone, unreported Issues and unknown Features, account for most customers not getting anything like a 100% return on their investment in RecFind.

Surely, if you have invested in a product it behooves you to make maximum use of that product; to use it for multiple tasks and to solve multiple problems? To obtain the best possible return on your investment? To get the best possible value for your dollar?

### *Issues*

When I am with a customer I can easily explain how to use a feature and I can also usually diagnose why some feature isn't working as expected. In most cases it is an incorrect installation or a network permissions problem. In 99% of cases it can be fixed easily and quickly; it is rarely a real 'bug'.

The real problem is that the customer doesn't report the issue and just 'puts up with it'.

Please, if there is ever anything in RecFind that you don't understand or don't think is working properly, report it. We always respond and usually within one day. There is never any reason to 'put up with it'.

### **How to Report an Issue?**

We provide several ways but for now let's just talk about the 'free' ways. This is all about obtaining a better return on your investment so let's not spend any money if we don't have to.

The best place to start is our website; [www.knowledgeonecorp.com](http://www.knowledgeonecorp.com)



There are two places to lodge issues, the **Support** section;

<http://www.knowledgeonecorp.com/support/index.htm>

and the **Contact Us** section:

<http://www.knowledgeonecorp.com/contactus/officelocations.htm>

### **Free Email Support**

In the support section we have free email support, see the following link:

<http://www.knowledgeonecorp.com/support/freeemailsupport.htm>

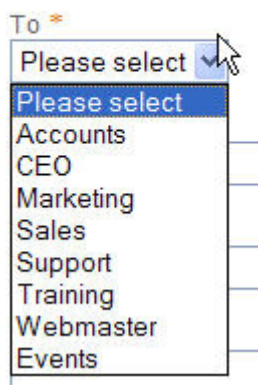
This is the best place to report any suspected bugs or features not working as expected.

### **Contact Us**

In the contact us section, you are able to contact any division of Knowledgeone Corp depending upon your problem or question:

<http://www.knowledgeonecorp.com/contactus/emailus.htm>

## Email Us



In most cases you will be contacting support or training. And in case you hadn't guessed it, any email addressed to the CEO comes straight to me.

So, there is no excuse for not reporting any issue. It is free, easy and we always respond. But, we can't respond if you don't tell us about the issue.

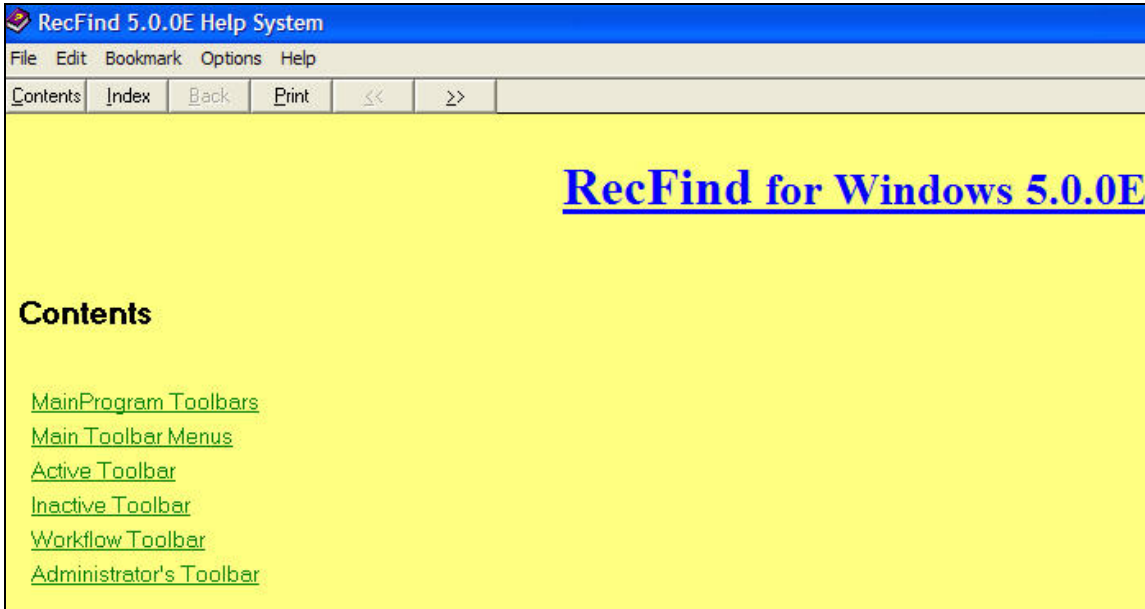
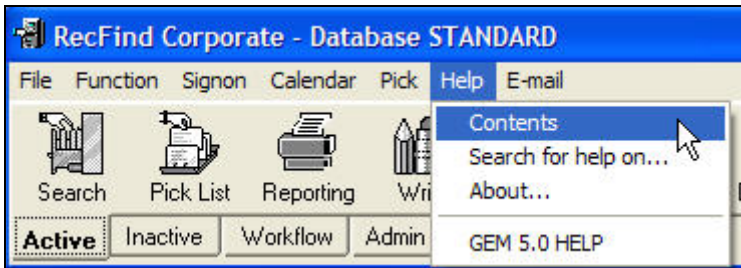
### ***Features***

The business of records and document management is far more complex and varied than most people realize. This is why RecFind is such a large and multi-featured product with a plethora of options. Because RecFind is an 'Off-the-shelf' product (we do not do special versions) it has to have a plethora of features and options because it has to satisfy the diverse and disparate requirements of customers all around the world.

### **Overview of all RecFind Features**

For an overview of all of the features of RecFind I suggest two sources; the RecFind help screens and our website.

For the first simply start RecFind and then click on the main help button and Contents.



You can then browse through all of the features on each toolbar. Note that most screen images have active links or 'hotspots' for additional information.

For the second please select our website and click on the product menu and then select RecFind products as follows:

[http://www.knowledgeonecorp.com/products/recfind\\_corporate.htm](http://www.knowledgeonecorp.com/products/recfind_corporate.htm)

### **No One Uses all of RecFind's Features and Options**

I don't have any customer in the world that uses all of the features or all of the options of RecFind. I am also pretty sure that each customer uses a unique subset and that no two customers have exactly the same requirements. RecFind does a slightly different job everywhere it is installed.

So, RecFind was designed to be flexible and it was designed to be able to 'fit' the differing requirements of thousands of customers. It 'bends' to fit your needs, you don't have to change the way you do business to 'fit' RecFind.

My travels and empirical evidence tells me that most customers grasp the basic functions of RecFind but very few really understand or even know about the advanced functions.

This tells me two things. One, we need to run and promote many more RecFind training courses than we do now. And two, we need to offer advanced RecFind training courses to our current customers, concentrating on the advanced features and options of RecFind.

### **Training**

This comes down to training (and there is no substitute for training if you want to learn all about our product) but we shouldn't think this means just regular scheduled classroom courses.

We have many and varied ways to address this need. We can schedule and run a public course, we can run a course just for your organization, we can tailor a course to your exact requirements, we can organize one-on-one training using an instructor or consultant or we can run tailored courses for you over the web.

This last option (via the web) is often the most convenient and least costly. However, it is really only suitable to short duration events like up to say four hours maximum. For an explanation of how this service works see the following link:

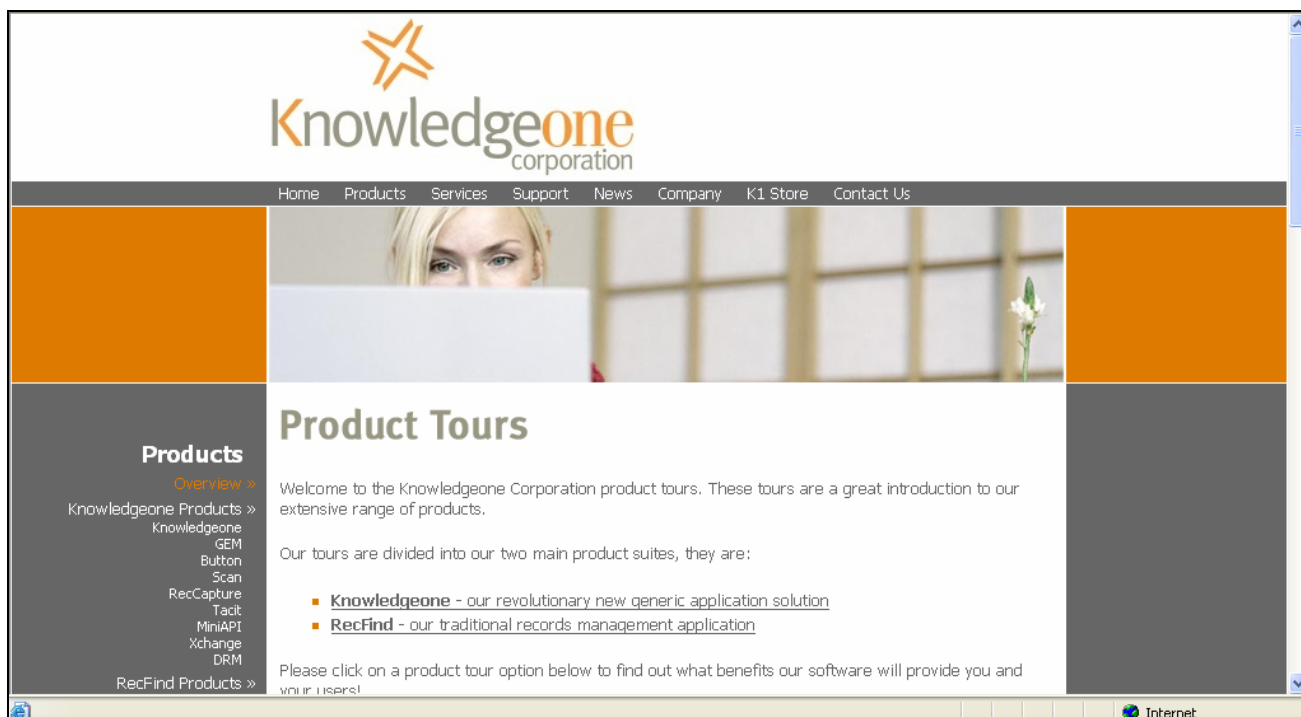
<http://www.knowledgeonecorp.com/support/livehelp.htm>

### **Online Introductory RecFind Training Course**

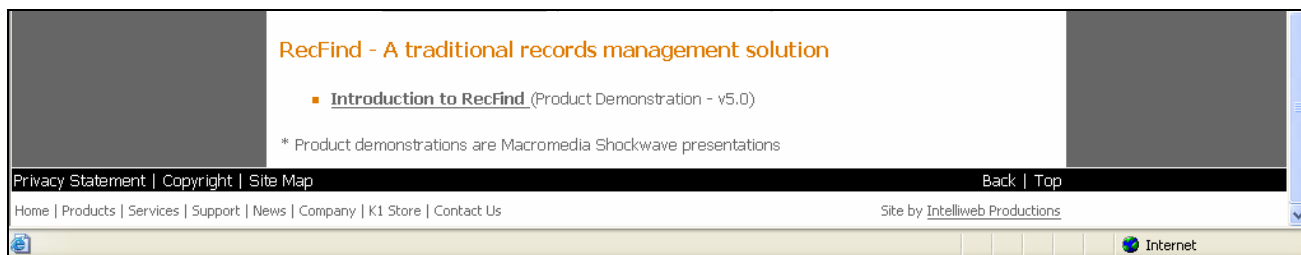
There is also a short online training course on the basic RecFind functions on our website. It is free but you need to register each time you use it. See the following link:

<http://www.knowledgeonecorp.com/products/tourrequest.htm>

Complete the form and then after you have received the confirming email with the tour URL, click the URL to see the following screen:



Select the RecFind tour at the bottom of the page (it is actually an introductory course), not Knowledgeone.



## **Overview of the Standard Courses**

For an overview of the content of the standard courses please refer to the following URL:

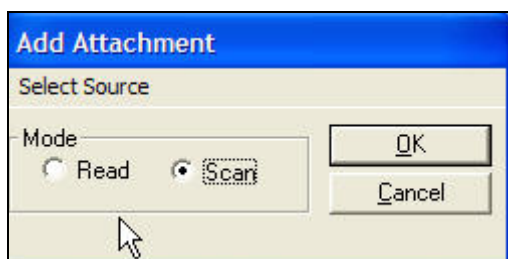
<http://www.knowledgeonecorp.com/services/courseDescriptions.htm>

## **What are the 'Standard' Advanced Features I need to tell People about Most Often?**

### **Electronic Document Management, Imaging and Workflow**

Invariably it is electronic document management, imaging and workflow. I am always talking to customers who do not realize that standard RecFind-Corporate includes functionality to capture and index and view electronic documents, emails and images.

For example, customers don't realize that any RecFind-Corporate workstation can become an imaging working station simply by attaching any TWAIN compliant scanner (and that is most of the scanners on the market). RecFind senses the TWAIN driver and turns on the imaging control in Document Maintenance as follows:



In case you hadn't guessed, in the above control you click Read if you want to capture an electronic document from the file system and you click Scan if you wish to capture a paper document you will scan in as a compressed TIFF file, (and yes, we do support multi-age TIFF files).

In most of these cases, the customer is using RecFind-Corporate to manage physical assets like file folders and paper. In most instances, the customer would like to be able to scan incoming correspondence and capture electronic documents and emails but isn't aware that the product they already have and have paid for can do all of the above and much more.

That is, they are not aware that they can obtain significantly more value from a product they already have. That they can implement and roll out sophisticated EDRMS (Electronic Document and Records Management Solutions) without spending one more cent.

### **The Import/Export Engine**

The RecFind Import/Export Engine (IEE) is a standard, no cost product supplied with every copy of RecFind-Corporate. It is both a powerful import and export engine and an API (because it can be run automatically with a saved format). You can run it manually for one-time imports or export or you can run it under program control to link or integrate RecFind to another application.

It is the easiest and fastest way to either create or update records in RecFind. For example, I could easily create say 5,000 new file folder records in Excel, export them as a CSV (comma delimited) file and then use the IEE to read them and populate the RecFind database all in less than 30 minutes. Try doing this manually and see how long it takes.

The IEE, just like the Clone method, can provide significant savings in manpower. Why spend days doing a task when RecFind includes standard tools that let you complete that same task in hours or minutes?

## ***What are the 'Standard' Features Customers Have the Most Trouble Understanding and Using?***

Undoubtedly, they are file titling and Retention, Retention especially.

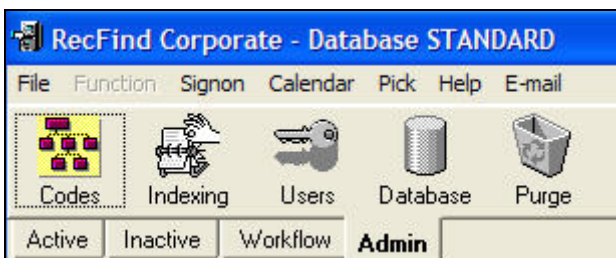
The Retention function in RecFind has been built to allow for the vagaries of practice all over the world. It supports almost any method used to manage the life cycle of records (both physical and electronic). Because of this, it is the most complex feature in RecFind. However, it can be used in a very simple way just as it can be used to implement a corporate file plan with multiple retention schedule and multiple triggers.

We do offer a Retention training course and we provide a plethora of information on our website including the following PDF (note that prices are quoted in \$Aust):

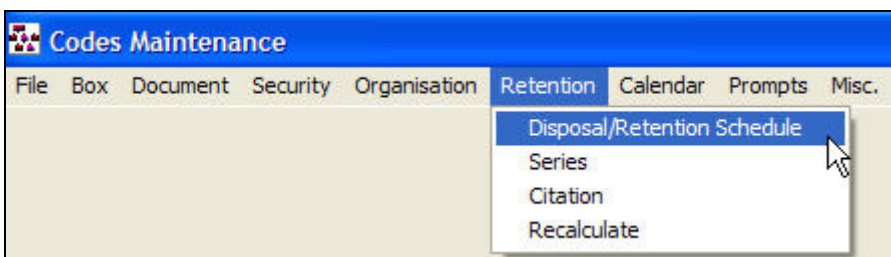
<http://www.knowledgeonecorp.com/services/pdfs/RFInactiveTraining.pdf>

We also provide detailed explanations and examples in the RecFind help screens. For an example, select the retention function in RecFind (see following steps) and then click Help.

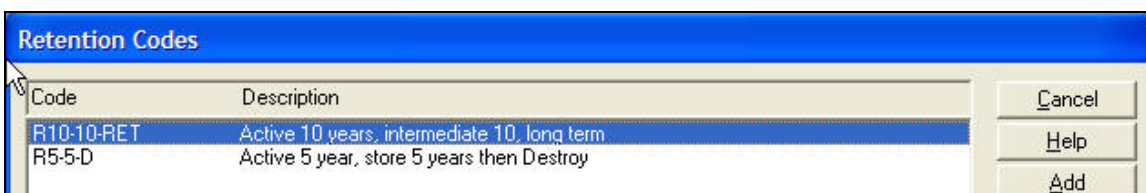
Select the Admin toolbar and click the Codes icon.



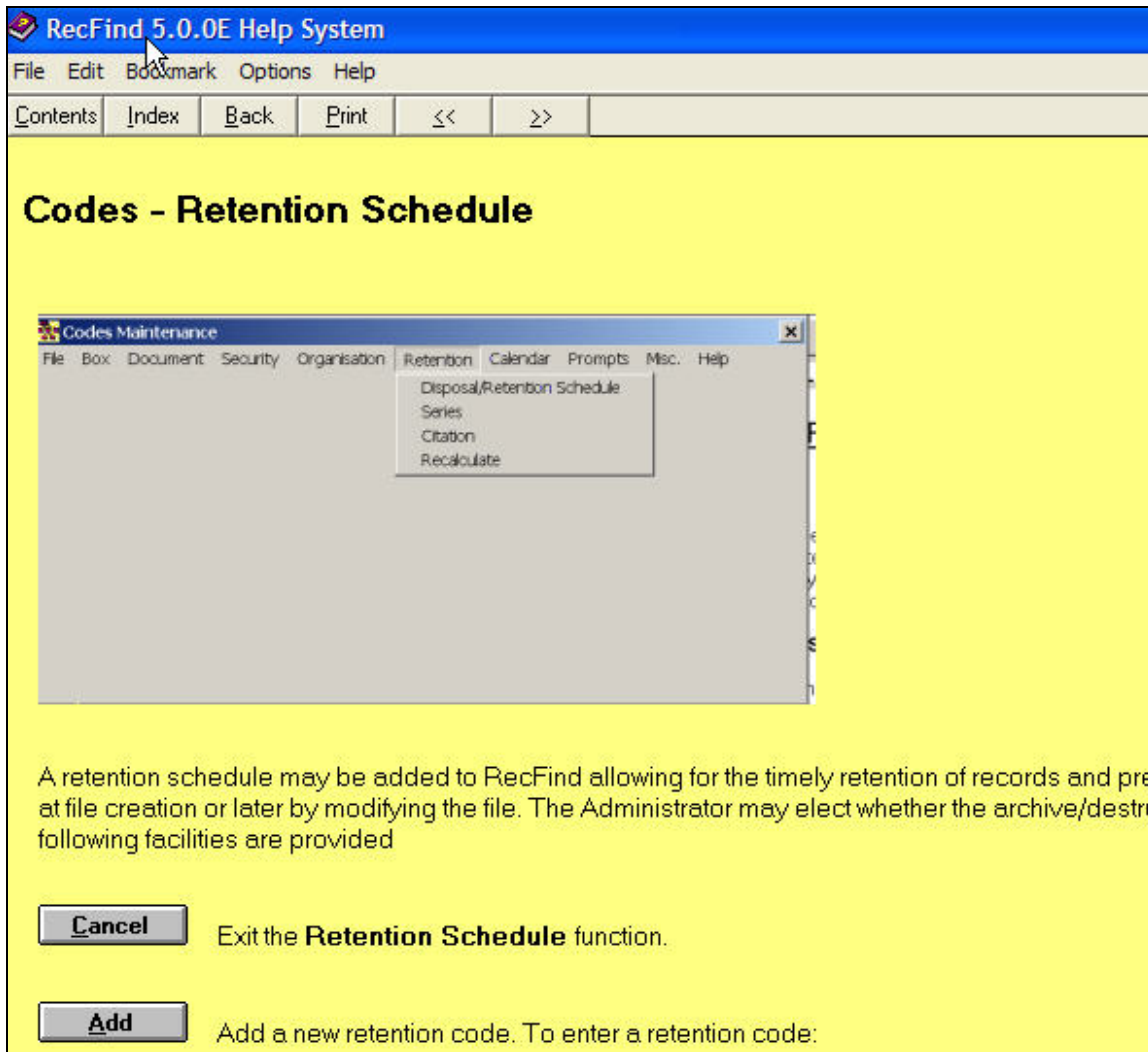
Select Retention - Disposal/Retention Schedule.



Click Help.



Read the section on Retention and click on active links.



**Codes - Retention Schedule**

A retention schedule may be added to RecFind allowing for the timely retention of records and pre- at file creation or later by modifying the file. The Administrator may elect whether the archive/destru following facilities are provided

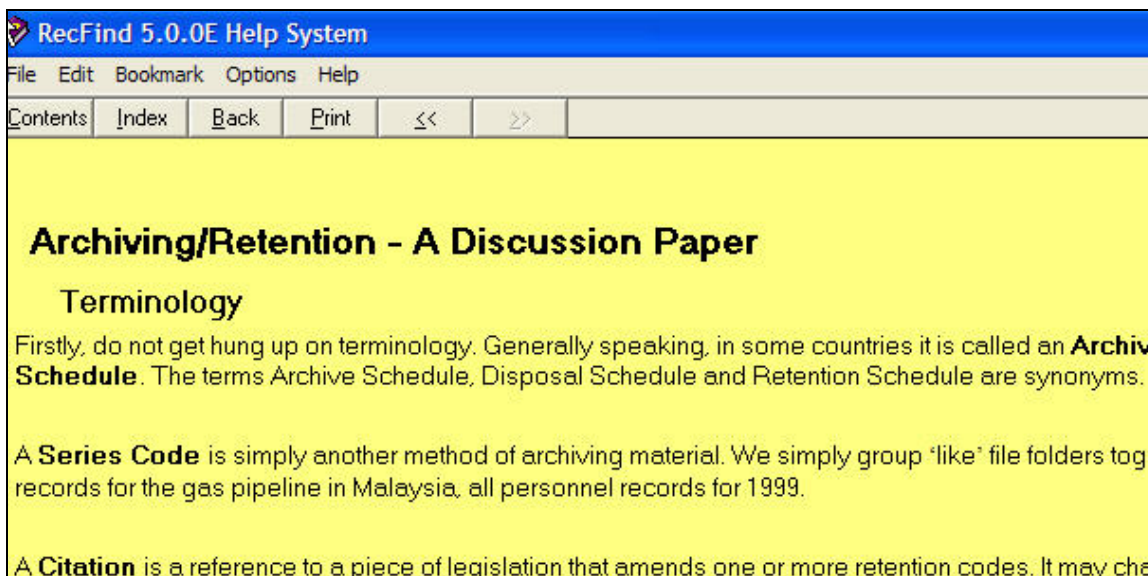
**Cancel** Exit the **Retention Schedule** function.

**Add** Add a new retention code. To enter a retention code:

At the end of the Retention section click on the reference to a white paper on retention scheduling.

For more general information on the practice and processes of Retention please refer to our white paper on [Retention](#).

This is a general discussion on the practice of Retention.



**Archiving/Retention - A Discussion Paper**

**Terminology**

Firstly, do not get hung up on terminology. Generally speaking, in some countries it is called an **Archive Schedule**. The terms Archive Schedule, Disposal Schedule and Retention Schedule are synonyms.

A **Series Code** is simply another method of archiving material. We simply group 'like' file folders toge records for the gas pipeline in Malaysia, all personnel records for 1999.

A **Citation** is a reference to a piece of legislation that amends one or more retention codes. It may cha

The above example is a good lead in to the next topic on RecFind's help system.

## ***Do you use RecFind's Help System?***

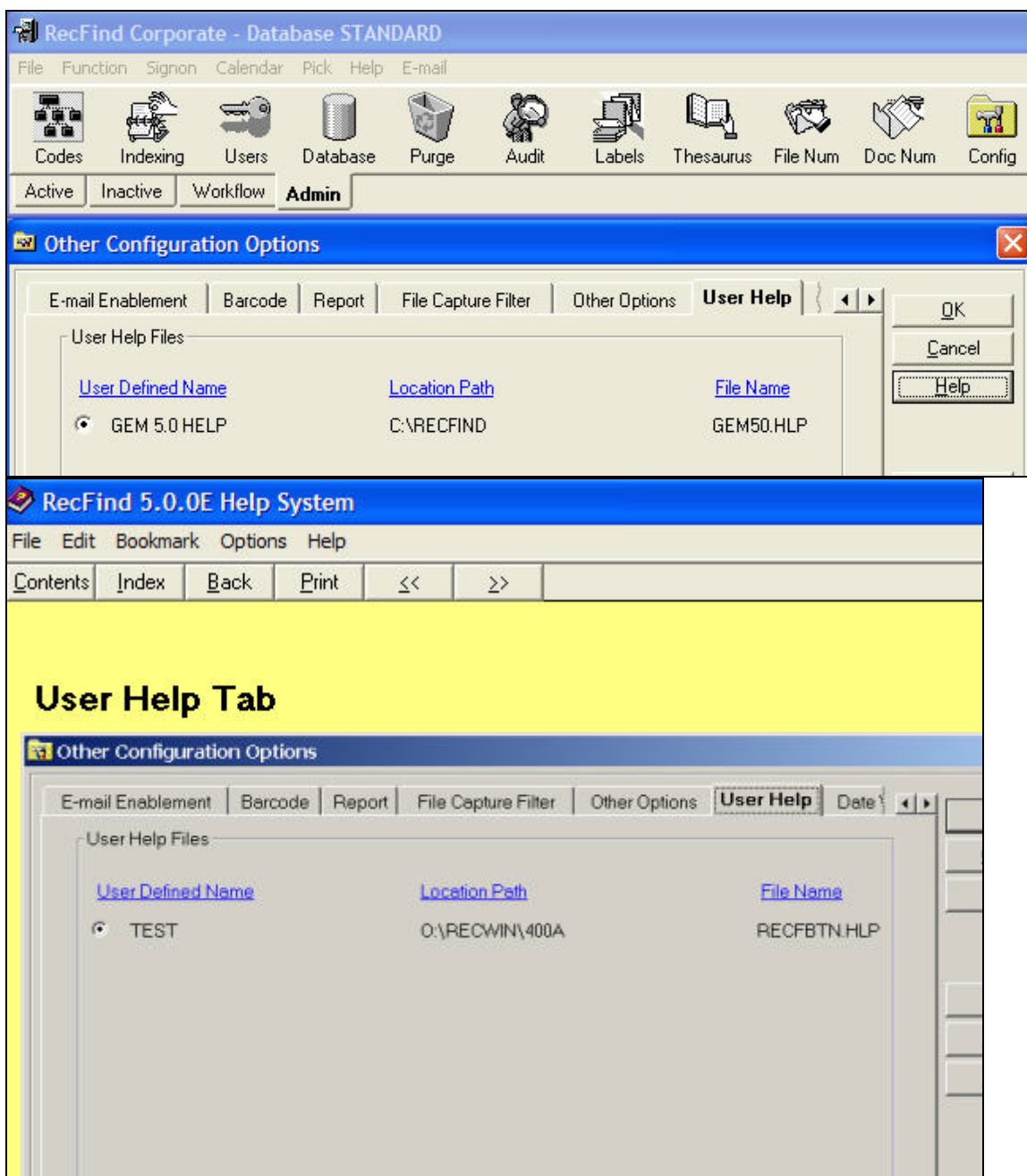
The RecFind help system is more than just a help system; it is also a comprehensive reference guide not just on RecFind but on the profession of records and document management.

I guarantee that almost every question a customer has asked me about how to use a particular feature in RecFind can be answered comprehensively within the RecFind help system. Please give it a try, you will not be disappointed.

## **Adding your own help screens to RecFind**

Oh, and did you know you can add your own help screens to RecFind? Say, your procedure manuals or special instructions?

Well you can and it is easy. For an explanation of how to do this select the Admin toolbar, the Config icon and the User Help tab then click the help button.



## ***What are the 'Optional' (extra cost) Advanced Features I need to tell People about Most Often?***

No doubt about this whatsoever, they are the Button, the RecQuery-TC API, GEM and RecCapture.

### **The RecFind-Button**

The Button is an easy (and low cost) way to quickly capture electronic documents and emails from within Word, Excel or Outlook and quickly store them within RecFind. See the following link:

[http://www.knowledgeonecorp.com/products/recfind\\_button.htm](http://www.knowledgeonecorp.com/products/recfind_button.htm)

### **RecQuery-TC API**

The RecQuery-TC API is a way to link RecFind to another application and 'image enable' that application by allowing it to independently view any object (within a browser) from within the RecFind database. See the following link:

[http://www.knowledgeonecorp.com/products/recfind\\_recquerytcapi.htm](http://www.knowledgeonecorp.com/products/recfind_recquerytcapi.htm)

### **GEM**

GEM is a new generation email management solution that is server-centric, fully-automatic and rules-driven. It analyses, captures, indexes and stores (in the RecFind database along with all your other records) all corporate emails. The real beauty of GEM is that the end users don't have to do anything and in fact are not even aware that GEM is running. No software to install on desktops, no user training and no productivity-drag. See the following link:

[http://www.knowledgeonecorp.com/products/recfind\\_gem.htm](http://www.knowledgeonecorp.com/products/recfind_gem.htm)

### **RecCapture**

RecCapture is another new generation product that does for electronic document management what GEM does for emails. It is also server-centric, fully automatic and rules-driven. Once again, you can implement an enterprise-wide electronic document management system without having to install any software on user's workstations and without having to train users (because they have nothing to do). See the following link:

<http://www.knowledgeonecorp.com/products/capture.htm>

### **Minimal Cost and Fully Integrated with RecFind-Corporate**

Now, while all of the above products are extra costs, they are minimal cost and all of them simply plug into RecFind and store their records in the RecFind database so each of these products is totally integrated with RecFind-Corporate.

These optional products allow you to achieve far more from your investment in RecFind by significantly extending RecFind's capabilities.

### **Knowledgeone<sup>K1</sup> (K1) Versions of Optional Products**

Yes, there are versions of the Button, GEM, RecCapture and the RecQuery-TC API (K1 Mini-API) for Knowledgeone. They were developed so our RecFind customers could enjoy 100% upwards compatibility when they converted to Knowledgeone.

# Knowledgeone

## ***Overview***

Knowledgeone is obviously a very different product to RecFind. The important thing to note is that it was not developed as a RecFind replacement. It was designed from the outset as a knowledge management system and a generic application solution based on the Microsoft .NET model.

RecFind and Knowledgeone do not share one iota of DNA and the design of RecFind played absolutely no part in the design of Knowledgeone. They are two totally, absolutely different products.

With Knowledgeone we set out to build something entirely new; to redefine the way application software works and can be used. It is truly a new genre.

## ***Choices***

We provide a RecFind to K1 conversion program with Knowledgeone. This program will convert all RecFind records and processes to Knowledgeone with a single button. It will produce a detailed report of the conversion and we also provide the instructions and a program so you can verify that all records have been converted. See the following link:

[http://www.knowledgeonecorp.com/support/faq/FAQ\\_K1\\_howtoverifyf2k1conversion.htm](http://www.knowledgeonecorp.com/support/faq/FAQ_K1_howtoverifyf2k1conversion.htm)

1. Once you have been trained in Knowledgeone and are familiar with it you could choose to convert your RecFind system to Knowledgeone and then begin using Knowledgeone in lieu of RecFind. However, please note that whereas Knowledgeone has a superset of the features of RecFind that it does everything very differently to RecFind. You for example, cannot do a one-for-one comparison of features in RecFind to K1 because of the very different way Knowledgeone processes information and records. You need to view Knowledgeone with a different mindset and fundamentally forget the way RecFind did things.
2. You can choose to continue using RecFind to manage your current records and documents and decide to utilize Knowledgeone for other application needs within your organization. For example, asset management, help desk, complaints management, human resources management, client relationship management, etc.

## ***Functionality***

- Knowledgeone can literally be anything you want it to be. This is because with Knowledgeone the customer is empowered to change both the data model and processes and we provide all the tools to do so.
- Knowledgeone provides infinitely more functionality, more flexibility, more configurability and more scalability than RecFind.
- All user functions in Knowledgeone are 'thin-client' and do not require any software to be installed or maintained on workstations. All user functions run with the browser (IE6).
- 'Out-of-the-box' Knowledgeone has been pre-configured to be a records management system (yes, with a much more comprehensive set of portable barcode reader programs than RecFind), electronic document management system, an asset management system, a human resources management system, a help desk system, a complaints management system, a correspondence management system and much more.
- Importantly, when pre-configuring Knowledgeone we used the exact same tools you will use (the DRM and Xchange and the standard Knowledgeone user interface) when making your own changes to Knowledgeone. We did this so you could immediately see the capabilities of Knowledgeone to solve multiple business problems concurrently.

## Information on Knowledgeone?

Just as with RecFind, there is a plethora of information on Knowledgeone on our website and within the online help system.

On the website, there are papers, online demonstrations and the knowledgebase. Start on our home page and begin with the Products menu item. Please try some of the following links to begin your search.

[http://www.knowledgeonecorp.com/products/knowledgeone\\_why.htm](http://www.knowledgeonecorp.com/products/knowledgeone_why.htm)

<http://www.knowledgeonecorp.com/support/knowledgebaseFAQ.htm>

<http://www.knowledgeonecorp.com/products/knowledgeone.htm>

To obtain access to the online demos please follow the instructions in the following link:

<http://www.knowledgeonecorp.com/products/tourrequest.htm>



Within Knowledgeone just click on the help icon and then enter your search criteria. You will find explanations and examples of how to use Knowledgeone as a records management system, document management system, asset management system, help desk system etc. The Knowledgeone help is much more than a help system; it is a full reference manual. For example:

The screenshot shows a web browser window with the address `http://localhost/K1/UI/Help/English/K1help.htm`. The browser's address bar includes a 'Go' button and a 'Web assistant' link. The page has a navigation bar with 'Contents', 'Index', and 'Search' tabs. A search box contains the text 'human resources' and a 'GO' button. Below the search box is a list of search results: 'Human Resources Management', 'Search by Range', 'Security', 'Triggers', 'Using K1's Multi-Personalities', and 'Welcome'. The main content area displays the article 'Human Resources Management'. The article text includes: 'Please read [Using K1's Multi-Personalities](#) before reading this topic.', an 'Overview' section, and several paragraphs explaining HR management in K1, including references to tables like 'Person Table', 'JobTitle table', and 'Entity Table'. The article concludes with a note that users can create and modify tables and fields to fit their organization's needs.

Address <http://localhost/K1/UI/Help/English/K1help.htm> Go Links Web assistant

Contents Index Search  GO Powered By RoboH

Type in the word(s) to search for:  
 GO

- Asset Management
- Complaints Management
- Corporate Vocabulary
- Customer Relationship Management
- File Titling
- Help Desk
- Human Resources Management
- K1-Tact
- Making Changes to K1
- Printing Color File Labels
- RecFind 5.0 Conversion
- Records Management**
- Retention
- Security
- Using K1's Multi-Personalities
- Welcome
- Where do I begin?
- Workflow

## Records Management

Please read [Using K1's Multi-Personalities](#) before reading this topic.

### Overview

Some years ago I wrote an introductory textbook on Records Management called "Records Management in the 90s – A survival guide".

Even as an introductory textbook it was still 140 pages. This is to say that explaining what records management is and is not is beyond the scope of this help system. It is not the job of this help system to explain what a records management application is but rather to guide the end user in 'using' K1 as a records management system.

We do this by walking you through some basic records management functions and showing at least one way these functions can be accomplished in K1.

K1 comes configured 'out-of-the-box' to run as a records management system. In configuring K1 as a RM system we have made a great deal of assumptions based on our 22 years in the records and document management business. These assumptions have dictated how we set up K1 to operate as a RM system.

However you may well want to change these assumptions and configure K1 to meet your specific and particular needs. This is what K1 was designed for. We expect every customer to change K1.

Address <http://localhost/K1/UI/Help/English/K1help.htm> Go Links Web assistant

Contents Index Search  GO Powered By RoboH


Type in the word(s) to search for:  
 GO

- Changing K1 - **MA**
- Complaints Management
- Customer Relationship Management
- Help Desk**
- Security
- Using K1's Multi-Personalities
- Welcome

## Help Desk

Please read [Using K1's Multi-Personalities](#) before reading this topic.

### Overview

The K1 Help Desk Personality is Incident Table centric 

Details of all Help Desk calls (incidents) are recorded in an Incident record.

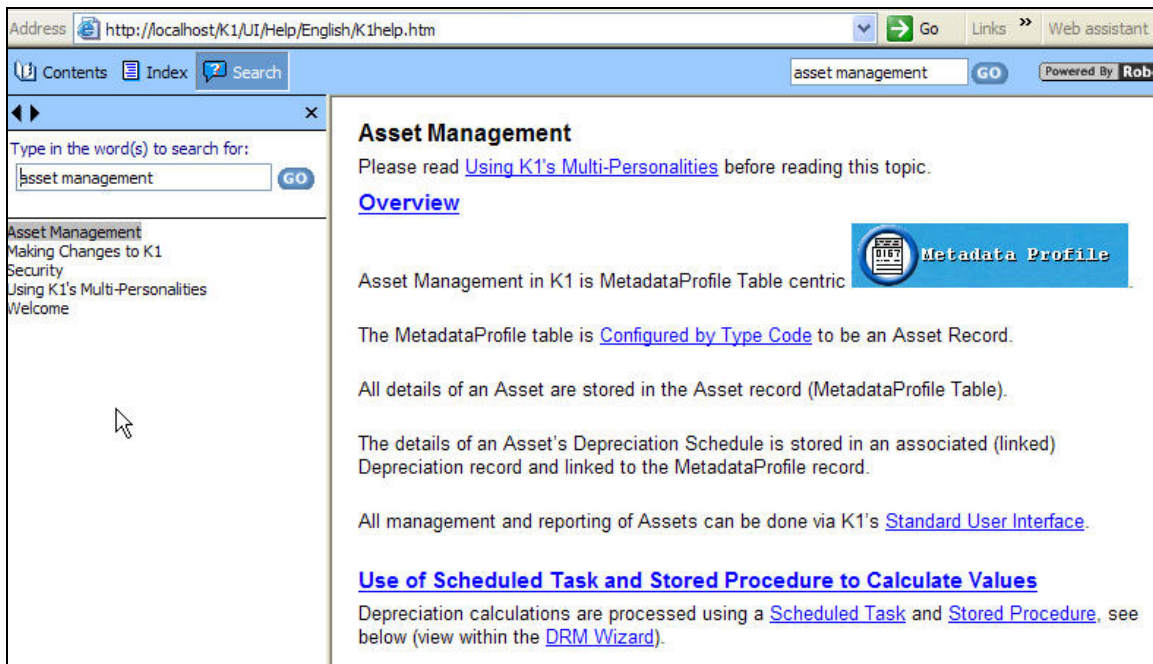
The Incident record links to the Entity Table (the organization) and the Person Table (the contact).

The Incident record also links to the ProductService, Escalations, Referrals and MetadataProfile Tables.

All management and reporting of Incidents can be done via K1's [Standard User Interface](#).

### Use of Triggers and Stored Procedures for Incident Processing

We have coded both a Trigger and a Scheduled Task/Stored Procedure to automatically update the [Data Grid Field](#) in the Incident record. This is done via the [Data Grid Field](#) in the Incident record.



Again, just as with RecFind, there is also a reference manual in PDF format on the Knowledgeone product CD.

## Support and Services

The Knowledgeone Corporation is a software and services company.

We are able to provide onsite support, consultancy, training and integration support to any customer anywhere in the world.

For a full description of all of our services please refer to our website under the Services and Support menu items on our home page.

<http://www.knowledgeonecorp.com/services/index.htm>

<http://www.knowledgeonecorp.com/support/index.htm>

## Summary and Recommendations

1. The RecFind-Corporate product suite is a far more powerful and capable application tool than most of you have realized.
2. It has many features and options that can significantly add value to your organization and, most significantly, improve the productivity of your organization.
3. RecFind-Corporate is not a simple file management program. It is a fully featured electronic document management, records management, imaging and workflow application solution. It is also extremely robust and has been designed to handle huge databases and a huge number of online users.
4. For most customers, the standard features of RecFind can provide extra value and solve multiple business problems for no extra outlay.
5. For some customers, adding optional products like GEM or RecCapture can provide you with an industry leading and lowest cost solution.

6. Knowledgeone is the next generation of application software; able to serve multiple applications needs concurrently.
7. Knowledgeone empowers the customer; allowing you to change almost anything (data model and processes) without programming. As such it is a true generic application solution (based on the .NET model).
8. Knowledgeone was provided free of charge to a select number of RecFind customers as a one-time special offer under the Automatic Software Upgrade agreement (ASU). Since the dollar outlay was zero it would be extremely difficult to find a better cost-effective deal than this. It would also be extremely foolish not to take advantage of Knowledgeone in your organization given its enormous capabilities. How could you possibly obtain a better ROI using any other product?

If you are not sure what RecFind or Knowledgeone can do for your organization please talk to us. You will find us most happy to respond. The more you make use of our products; the more our products add value to your organization, the happier we are.

Best Regards,

*Frank McKenna, CEO Knowledgeone Corporation*  
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[www.knowledgeonecorp.com](http://www.knowledgeonecorp.com)