



Knowledgeone **K1**

HOW TO VERIFY THE RECFIND TO K1 CONVERSION

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Overview	3
How To Get Accurate Counts From RecFind As The Baseline?	3
File Folders	3
Document Profiles.....	4
Boxes	5
Attachments (Electronic documents and images).....	6
Running The RecFind2k1 Report Program	7
Prerequisites	7

How To Validate The Knowledgeone^{K1} Record Count Against The RecFind Record Count

Overview

The RecFind2K1 conversion program supplied with Knowledgeone^{K1} (K1) will convert all RecFind information and processes to K1.

However, because the two products are so totally different in look and feel and architecture (K1 for example does not have multiple databases), some customers are having problems confirming that all RecFind 'records' have been brought across to K1.

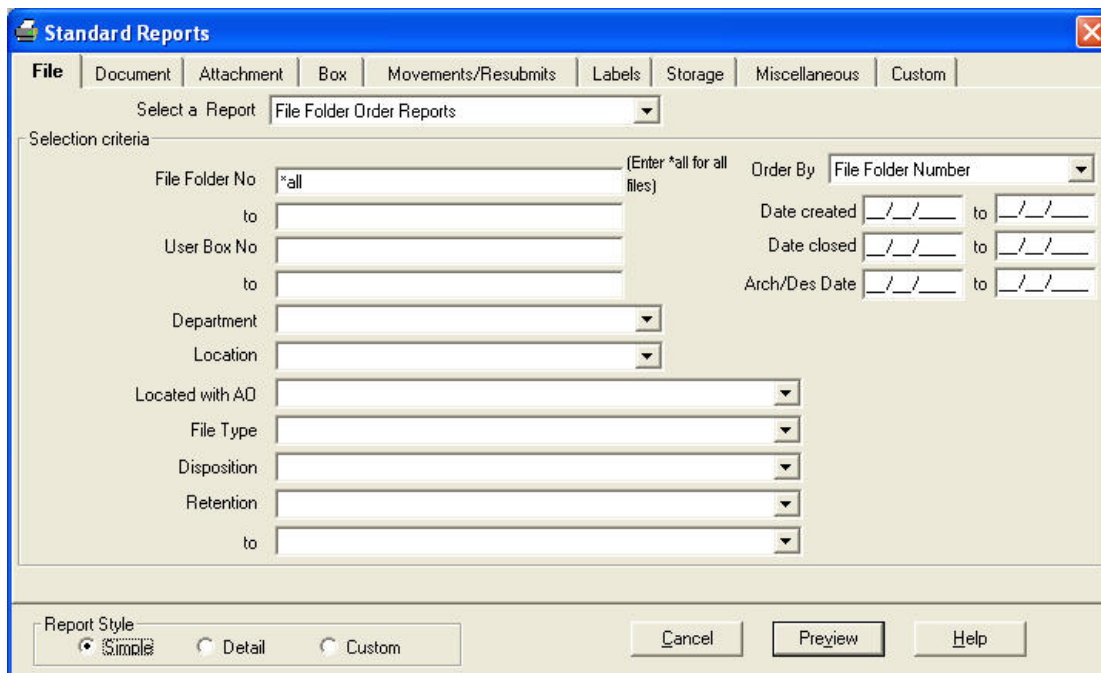
This paper plus the accompanying program will allow any customer to compare and verify records in RecFind against records in K1 after running the RecFind2K1 conversion program.

How To Get Accurate Counts From RecFind As The Baseline?

There are several ways but the easiest is to use the standard reports module in each RecFind database.

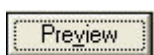
Basically, choose the standard report module and then run the 'simple' version of the Crystal report for Files, Documents, Boxes and Attachments as follows:

File Folders



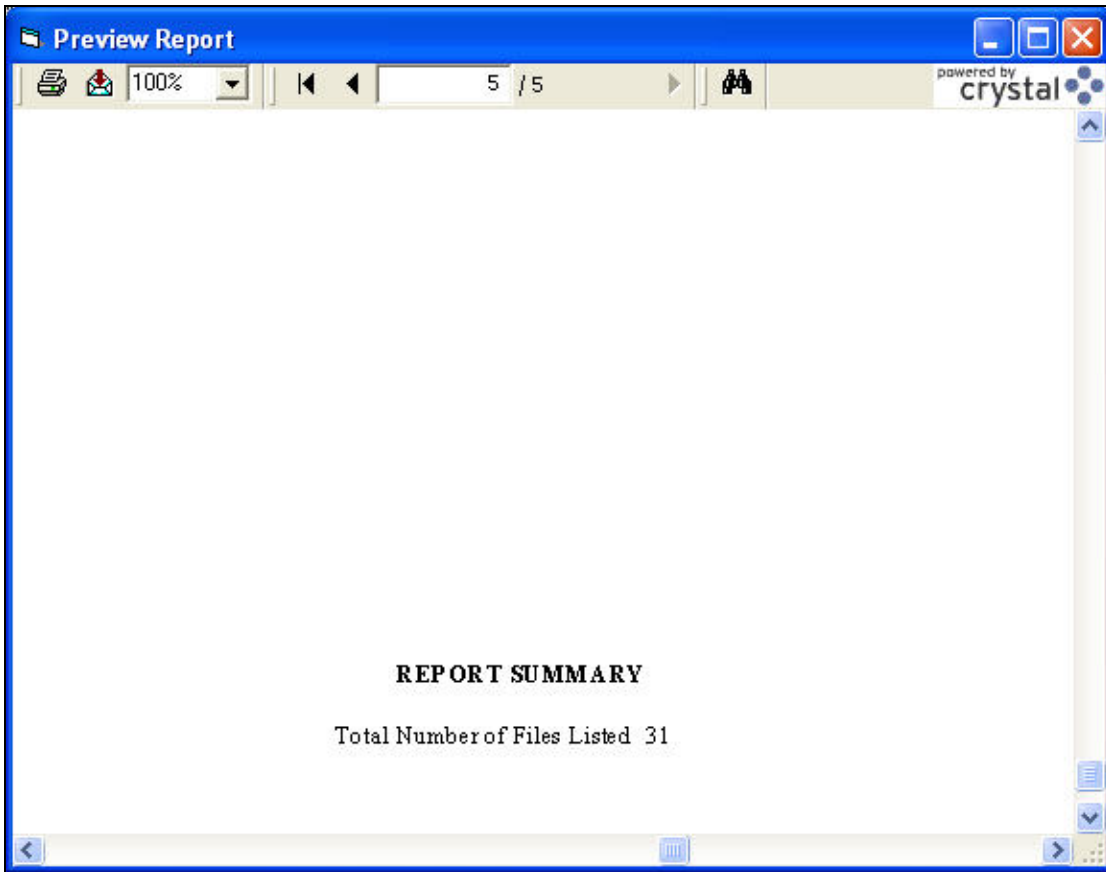
The screenshot shows the 'Standard Reports' dialog box with the 'File' tab selected. The 'Select a Report' dropdown is set to 'File Folder Order Reports'. Under 'Selection criteria', the 'File Folder No' field is set to '*all' with a note '(Enter *all for all files)'. The 'Order By' dropdown is set to 'File Folder Number'. There are also date range fields for 'Date created', 'Date closed', and 'Arch/Des Date'. At the bottom, the 'Report Style' section has 'Simple' selected, and there are 'Cancel', 'Preview', and 'Help' buttons.

Select 'Simple' and then 'Preview' after entering *all as above.



When the report displays, select the end of report button.





Document Profiles

The 'Standard Reports' dialog box is shown with the 'Document' tab selected. The 'Select a Report' dropdown is set to 'Doc Order Reports'. The 'Selection criteria' section includes the following fields and options:

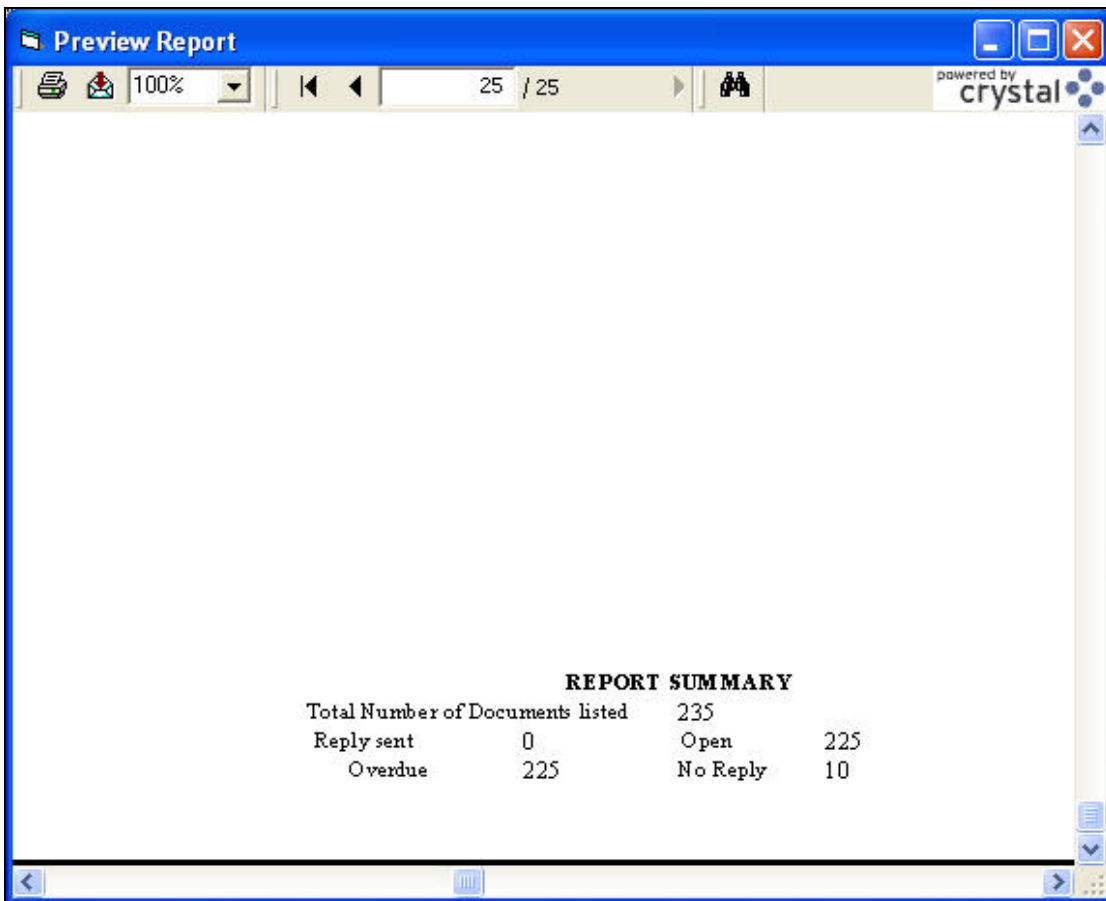
- Reg No: *all (with a note: Enter *all for all documents)
- File Folder No: *all (with a note: Enter *all for all documents in all files)
- Doc Type: [Dropdown]
- Author Type: [Dropdown]
- Action Officer: [Dropdown]
- Dated: [Date] to [Date]
- Reply Due: [Date] to [Date]
- Received: [Date] to [Date]
- Reply Sent: [Date] to [Date]
- Publication date from: [Date] to [Date]

Additional options include:

- Order By: Registration Number [Dropdown]
- Documents: All, Inward, Outward, Memo/Minute, Other
- Documents: Both, Attached, Loose
- Reply status: Any, Sent, Open, Due

The 'Report Style' section has Simple, Detail, and Custom. Buttons for 'Cancel', 'Preview', and 'Help' are located at the bottom right.





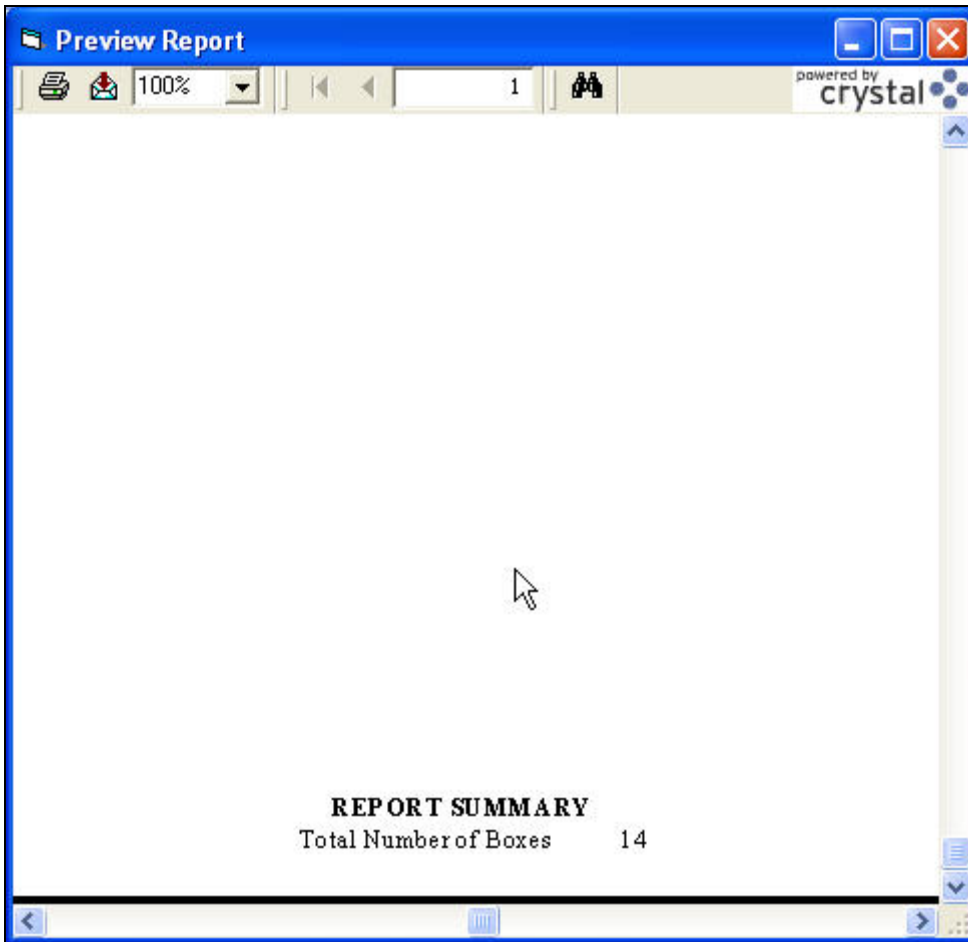
Boxes

The 'Standard Reports' dialog box is shown with the 'Box' tab selected. It includes a 'Select a Box Report' dropdown menu set to 'User Box No Order'. Below this are several input fields for selection criteria:

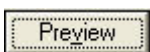
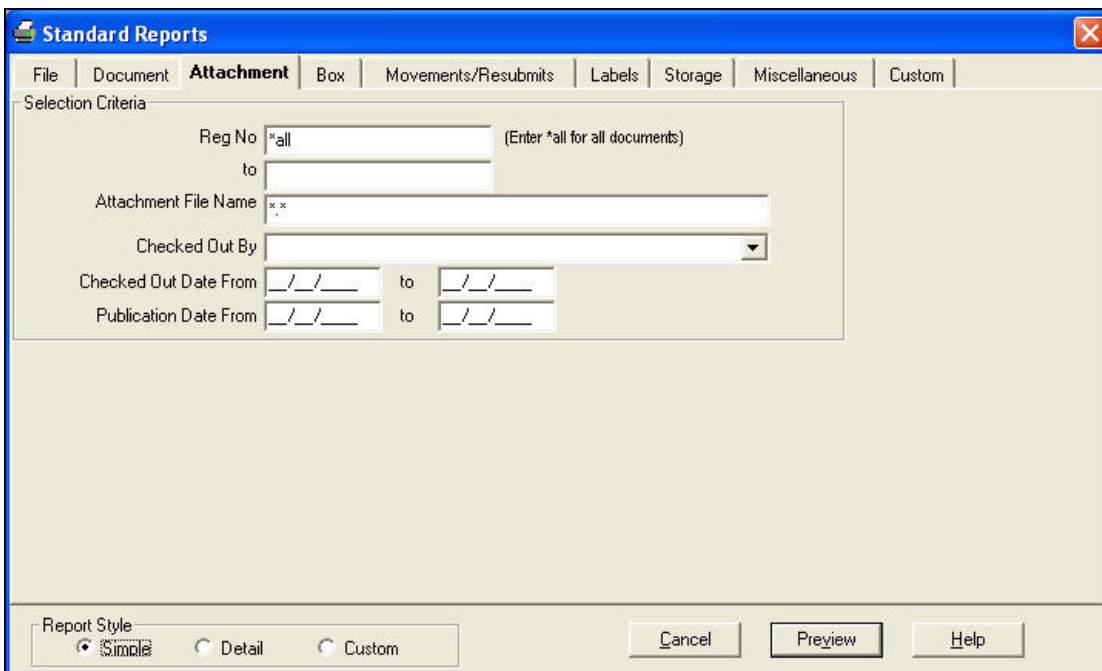
- User Box No: *all to (Enter *all for all Boxes)
- Space No: to
- Retention: to
- Key Contact: dropdown
- Box Type: dropdown
- Status: dropdown
- Department: dropdown
- Series Code: dropdown
- Consignment No: dropdown
- Contents From Date: to
- Contents To Date: to
- Date Created: to
- Event Date1: to
- Event Date2: to
- Arch/Des Date: to
- Active Until: to

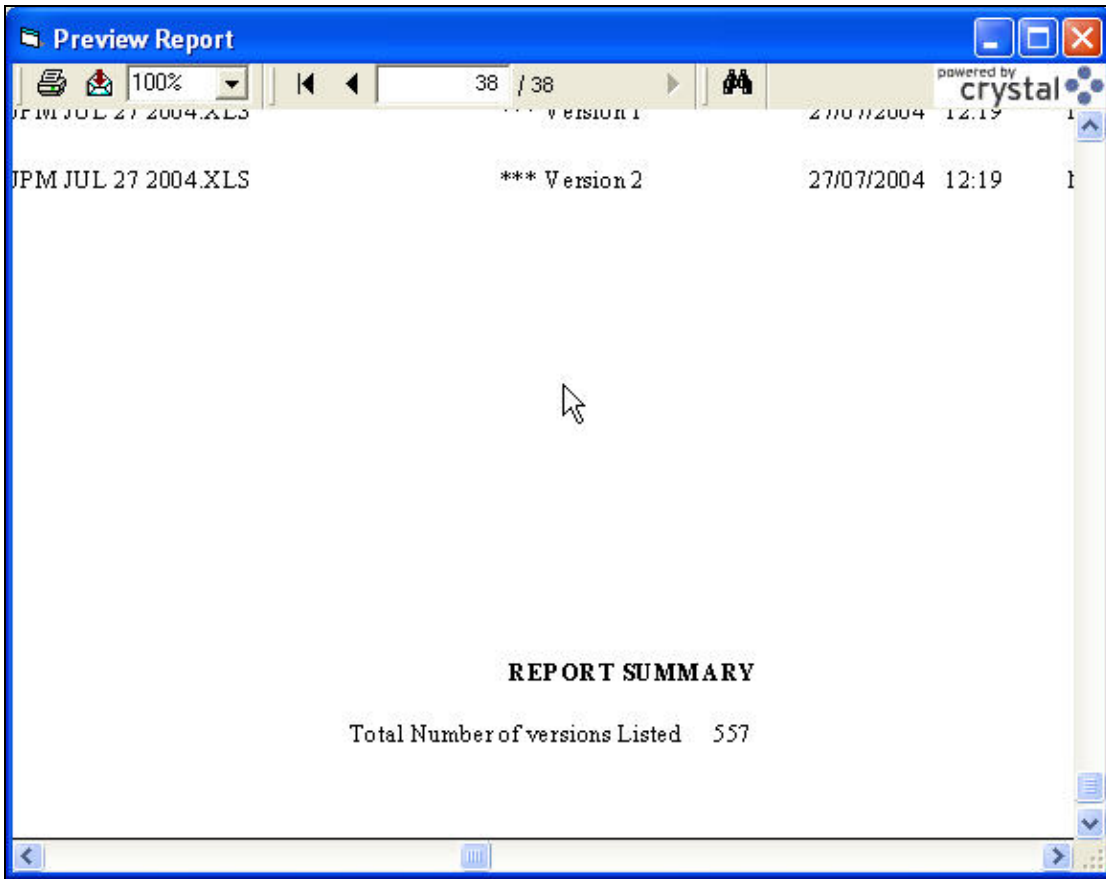
On the right side, there are radio buttons for 'Available', 'Not Available', and 'All' (which is selected). At the bottom, there is a 'Report Style' section with radio buttons for 'Simple' (selected), 'Detail', and 'Custom'. Buttons for 'Cancel', 'Preview', and 'Help' are also present.





Attachments (Electronic documents and images)





Obviously, you will need to reproduce the above reports for every RecFind database you convert to K1 and add up the totals.

Running The RecFind2k1 Report Program

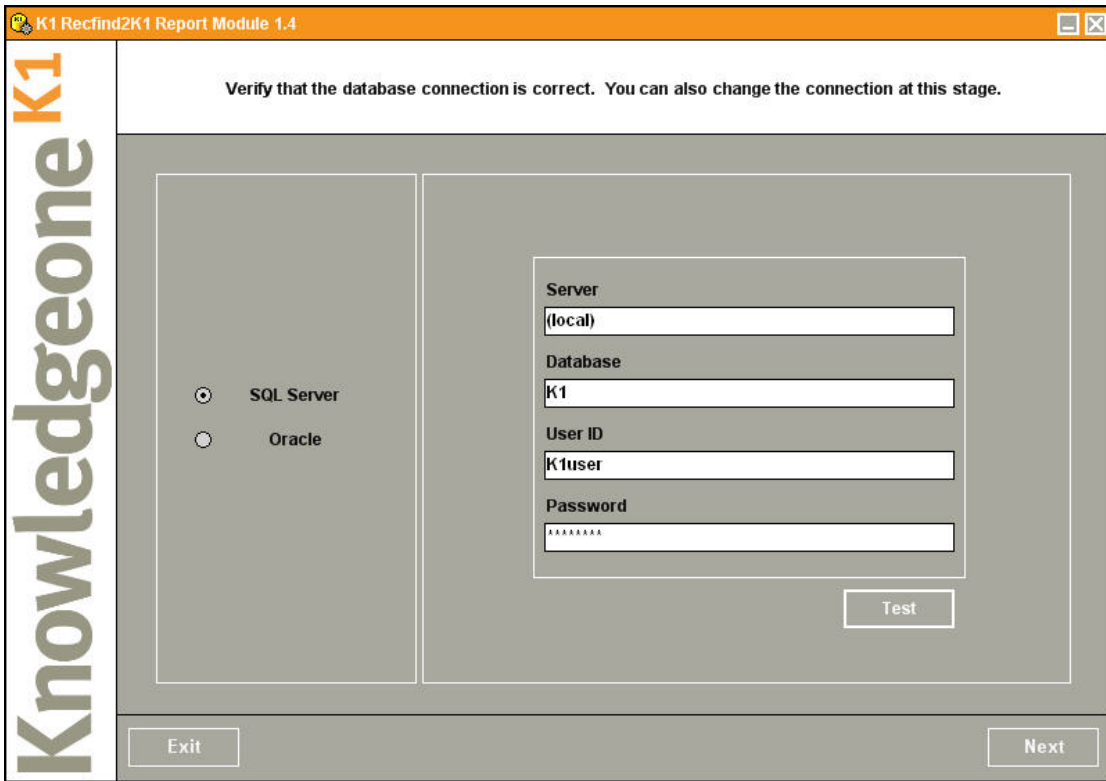
Prerequisites

1. The program must be installed on your workstation; you cannot run it from a network drive.
2. You must have the .NET framework installed.
3. If you use the Oracle version of Knowledgeone^{K1} you must have the Oracle client installed.

Run the Program by double clicking the program icon or shortcut



When the first screen appears (below) enter the details of your Knowledgeone^{K1} database.



Then click the 'Test' button to ensure the details are correct.



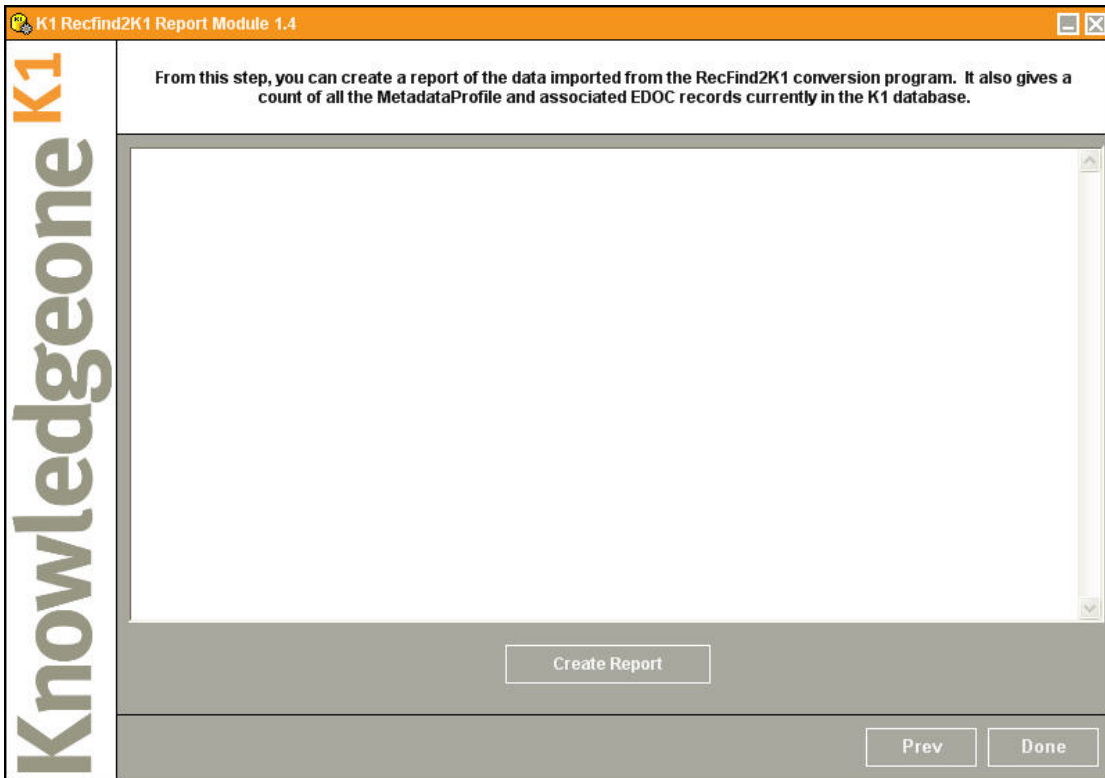
If correct, you will see the following screen.



Click the 'Next' button.



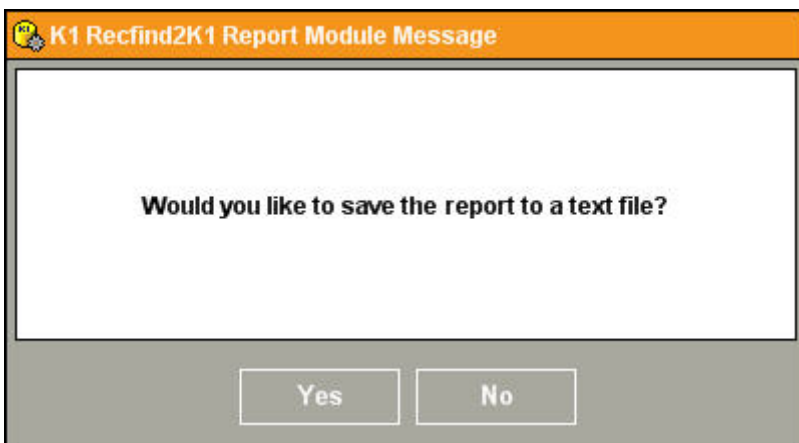
The next screen appears.



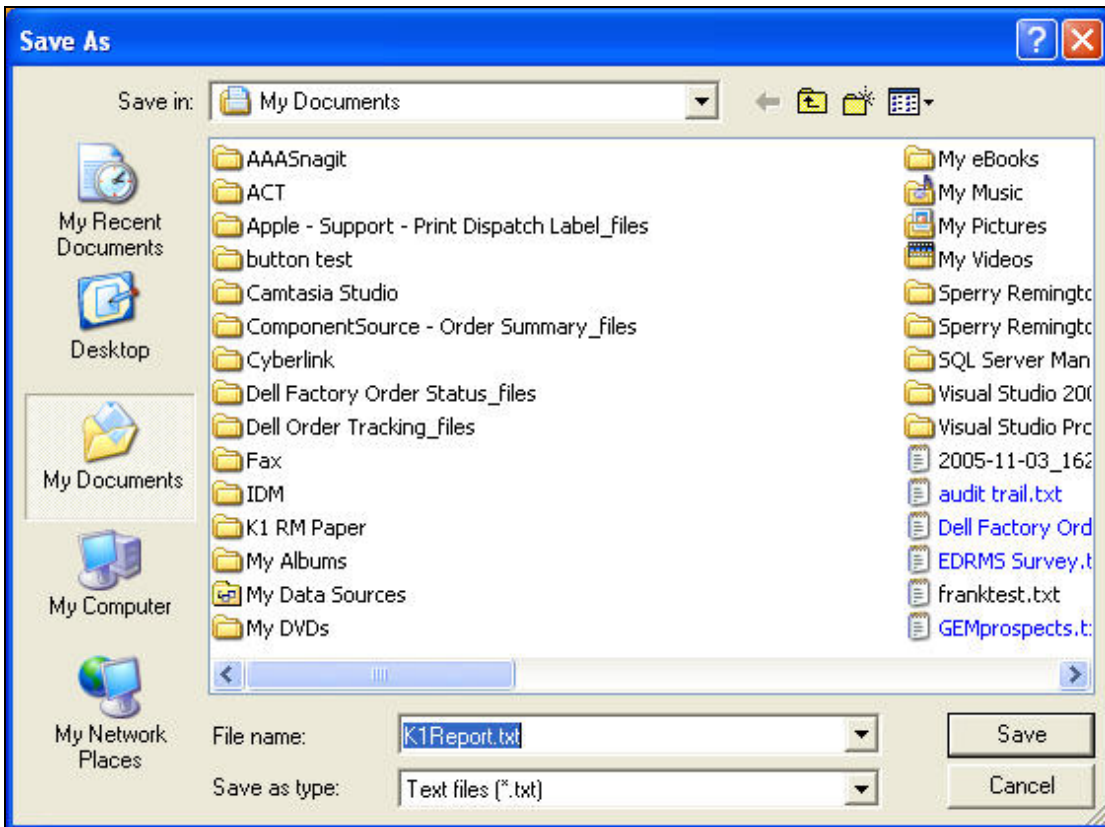
Click the 'Create Report' button.



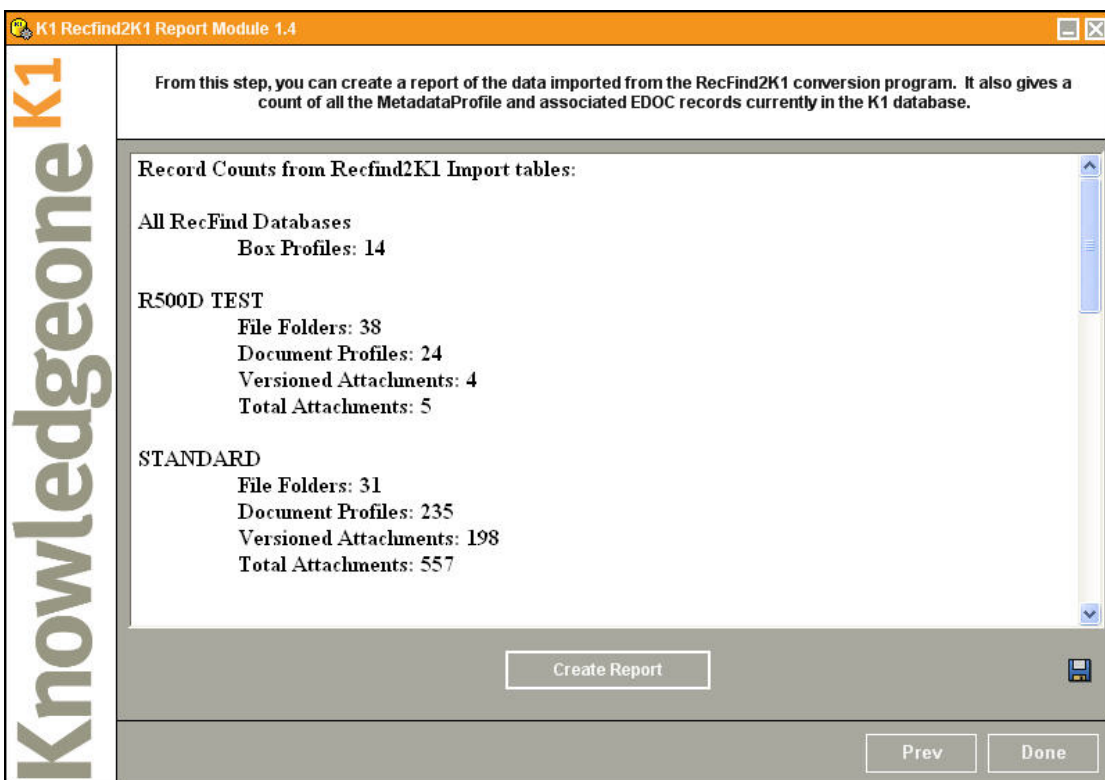
It asks if you would like to save a copy of the report, click on 'Yes' and save it for future reference.



Save and name a copy of the report as below.



After clicking save, you will see the details of the report, below.



When finished, click the 'Done' button.



You are now able to compare the two systems for file folders, document profiles, box profiles and attachments (electronic documents and images).

The numbers should match exactly. If they don't then either you haven't completed all processes as above or an error has occurred during the RecFind2K1 conversion.

If you believe something has gone amiss please supply a copy of the above reports plus a copy of the error report from the conversion as attachments and email everything, together with your details and an explanation of what you think is wrong (e.g., "300 file folders don't appear to have been converted from the Standard database") to support at:

support@knowledgeonecorp.com