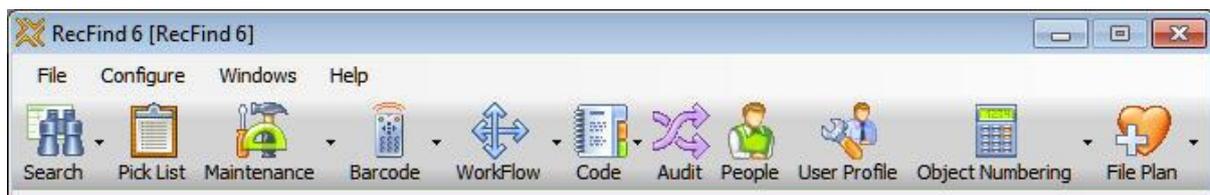




## RecFind 6 is the complete physical records management system

*We still have to deal with paper*



### Introduction

We first entered this business (let's call it records and document management) with a physical records and library management system called DocFind in 1984. We released the first RecFind in 1986 and that too was a purely physical records management system handling loose paper, file folders, filing cabinets, box management, offsite box storage, barcodes, barcode readers, file numbering systems, retention/archiving, disposal, file folder tracking, etc.

We added imaging in 1987 and document management in 2000. The first 32 bit version was RecFind 4.0 in 2002. RecFind 5 came out in 2005 and Knowledgeone (K1) in 2007. RecFind 6, the current product based on the latest .NET technology, was first delivered to customers in December 2008.

Importantly, we never deserted our records management background and each new release included new and improved records management capabilities as well as new and improved document management, workflow and imaging capabilities.

The current product, RecFind 6 version 2.8, is the culmination of 32 years of development and benefits from our 32 calendar years of experience (hundreds of man years) in both records management and document management. It contains a full complement of records management functionality and has a superset of the needs of any organization needing to meet records management compliance. It has also been tried and proven in the real world for that same 32

years. You can have absolute confidence that RecFind 6 will meet your records management needs.

NB: No, the current RecFind 6 is not the same product that we started with. It has been redesigned and rewritten with each new paradigm of languages and technology. The current version is designed and built using the very latest version of Microsoft Visual Studio and the very latest version of Microsoft SQL Server. It integrates with all the latest operating systems and products like Gmail and Office 365.

## **Why do some organizations only want a physical records management solution?**

There are really only two reasons given in our experience:

1. They are not yet ready to capture and manage electronic documents; and
2. They have a system in place to handle electronic documents (e.g., SharePoint) but it does not have the functionality required to manage physical records.

The former reason still surprises me ten years after we delivered a complete document management system (as did many other vendors) but it occurs far more often than you would think given the availability of proven document management technology and practices.

It alarms me because it means that none of these organizations are anywhere near meeting their legal compliance obligations. Some of the managers I have spoken to refer to it as an 'acceptable risk' under their risk management regime but I have seen too many organizations burnt in court cases to think that the risk is acceptable. In a great many of the cases I have seen it is a disaster waiting to happen, the 'San Andreas Fault' of the records management industry.

The latter reason is coming up more and more in recent times and usually from multinationals. In most of these cases head office has mandated that all subsidiaries will implement a corporate selected document management product but local management have been unable to utilize the mandated product to solve their physical records management needs.

Basically, the local staff soon realize that the mandated product can not accommodate the core needs of the local records management program especially around the need to manage physical records and meet all local compliance, legal and operational requirements. This is where we come in with RecFind 6.

## **How do we handle this requirement?**

Well obviously we supply, install and configure RecFind 6 to meet the records management needs of the organization and we also train their staff. Most times we also help out with records management policies and procedures and we also help formulate and finalize retention schedules and classification systems. We provide the onsite support and consultancy required as well as the software. In our parlance we 'complete the circle' providing all the software and services required to get the customer up and running in production.

In most cases we are also asked to 'integrate' RecFind 6 to the chosen document management system. This is really easy for us because of the tools we provide with RecFind 6 but usually too difficult for the vendor of the document management system who generally isn't too interested (or co-operative) anyway.

The integration generally means providing a 'search' capability from the chosen document management system or corporate portal into the records held within RecFind 6. We have

standard tools like the RecFind 6 Mini API that make this integration a reasonably easy, low cost and short duration task.

## **What are the physical records management functions of RecFind 6?**

1. Loose paper registration and tracking
2. File folder registration and tracking
3. Archive box registration and tracking
4. Bar-coding – portable and fixed barcode reader support
5. Inventories and census using a portable barcode reader
6. Transaction processing using a portable barcode reader
7. Multiple Classification Systems/Keyword Thesauri/Taxonomies
8. Multiple retention schedules, retention/disposal processing
9. Full File Plan functionality
10. Corporate Vocabulary
11. Series code functionality
12. File/document numbering system
13. File Titling system
14. Powerful security system
15. Fully configurable audit trail including the option to take before and after looks of records
16. User management
17. Organization management
18. Vital Records management functionality
19. Powerful workflow function
20. Automatic full text indexing of all text based documents (e.g., scanned paper converted to PDF format)
21. Powerful search function including full text (Google like search) Metadata and Boolean with saved searches. Automatic indexing and searching on all fields
22. Powerful inbuilt report writer plus a full complement of standard reports
23. Offsite records centre management

24. Email enablement of all workflow functions such as Requests/Bring-ups, Movements, workflow, etc
25. Full imaging capabilities including supporting any scanner with a TWAIN interface, high volume scanning, Optical Character Recognition, automatic conversion of scanned images to searchable PDFs, forms processing (capturing Metadata from scanned images), etc.
26. Fully configurable data model
27. Fully configurable business processes and workflow
28. Fully configurable end-user interface – providing each end-user with only the functionality and options required
29. Fully multi-lingual – language is configurable at the end-user level
30. Full integration with Microsoft Office including Outlook

The above isn't a comprehensive list, it is just a summary of the main records management features of RecFind 6 and all of the above are included in the standard product, the High Speed Scanning Module and the Mini API.

There are no expensive options or add-on modules to purchase and integrate to other than the RecFind 6 High Speed Scanning Module (if you have high volumes of paper to capture or wish to use forms processing) and the Mini API if you wish to integrate with another application. We guarantee that everything you will need for physical records management is already part of the standard RecFind 6 product.

Please see these links:

[http://www.knowledgeonecorp.com/products/recfind\\_6.htm](http://www.knowledgeonecorp.com/products/recfind_6.htm)

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_hssm.htm](http://www.knowledgeonecorp.com/products/recfind_6_hssm.htm)

[http://www.knowledgeonecorp.com/products/recfind\\_6\\_miniapi.htm](http://www.knowledgeonecorp.com/products/recfind_6_miniapi.htm)

## Conclusion

If you need a full power records and document management system (now called a content management system) then RecFind 6 is that system.

However, if all you need at this time is a fully functioned physical records management system that will allow you to meet all of your records management and compliance needs then RecFind 6 is also that system. Please talk to us.

