



Using the RecFind 6 Button for EDRMS

The worlds' easiest to use, easiest to roll-out and lowest cost EDRMS product



Introduction

EDRMS stands for Electronic Document and Records Management System.

Electronic documents come in a multiplicity of forms. However the most common and most familiar will be emails, Word, Excel, and Adobe PDF.

Every records management standard and every current piece of compliance legislation requires you to capture business related electronic documents.

Electronic documents, like paper documents, are evidence of business transactions.

You need to be able to capture (and quickly retrieve) all steps in a business transaction in order to run your business efficiently and diligently.

Capturing all business related electronic documents will (figuratively) save your life time and time again.

By not capturing electronic documents you are taking enormous risks.

To reiterate, capturing electronic documents isn't just about meeting a standard or complying, it is about running your business as efficiently and as diligently and as safely as possible. It is about risk management and efficient business processes. It is about protecting your business.

What is the RF6 Button?

The RecFind 6 Button is a small, inexpensive .NET 'smart-client' application that sits both in the toolbar of a document authoring package (e.g., Outlook, Word, Adobe Professional) and in the SysTray of your Windows PC or notebook.

It has an amazing degree of functionality including check-in, check-out, search and scan. When scanning in paper documents it even has an option to OCR and convert to a text-searchable PDF document.

It is unobtrusive, easy to use (requires minimal training) and can check-in and check-out electronic documents of any type.

It is delivered as an MSI and can be 'pushed-out' using active directory.

It is integrated with MS Office (including Outlook and PowerPoint) as well as GroupWise, Lotus Notes and Adobe Professional.

Being a .NET 'smart-client' it operates both over your LAN and your Intranet/Internet. You can deploy it just as easily to your remote offices as you can to your head office PCs.

It is the ideal EDRMS tool for your staff who travel and use notebooks because it can connect to the RF6 database from anywhere in the world there is an Internet connection.

It isn't 'thin'; it is 'smart', the next generation of Internet enabled products.

How does it work?

Embedded in an authoring product (e.g., Microsoft Word)

The RF6 Button sits in the ribbon under 'Add-ins', see below:



You can open and then check-in a Word document or you can create a new Word document and then check it in simply by clicking on the check-in icon .

You can search for and then check-out any Word document stored in RecFind 6 by simply clicking on the check-out icon .

From the SysTray

The RF6 Button sits in the SysTray at your lower right, see below:



Simply double click it to display the Button main screen.



You open the Button and then select any document type from the file system and then check it in.

You can open the Button and then search for and check-out any document in the RecFind 6 database.

You can also scan (from any TWAIN compatible scanner) any paper document (including multi-page documents) and check it in. You can also choose to OCR that document and check it in as a text-searchable PDF.

Configuring the RecFind 6 Button

Like all RecFind 6 products, the Button is configurable to your specific requirements.

You can specify the Metadata (information about information or in this case, transactional and contextual information about an electronic document) that users need to collect for each electronic document. You determine which fields are mandatory and which are optional. You can also specify the field captions to be used so the terminology is exactly right for your business.

You will notice that the Button automatically captures basic Metadata like original location, original filename, suffix, content type, published date, etc., so you don't have to. The idea is to give the end user as little to do as possible when capturing electronic documents.

This same philosophy also applies when you configure the fields you want filled in. Keep it simple, you shouldn't ask the user to do much more than select a folder within RecFind 6 to attach the new document to. It isn't rocket science, if you keep it simple and fast the end users will happily use it; if you make it complicated and slow the end users won't use it.

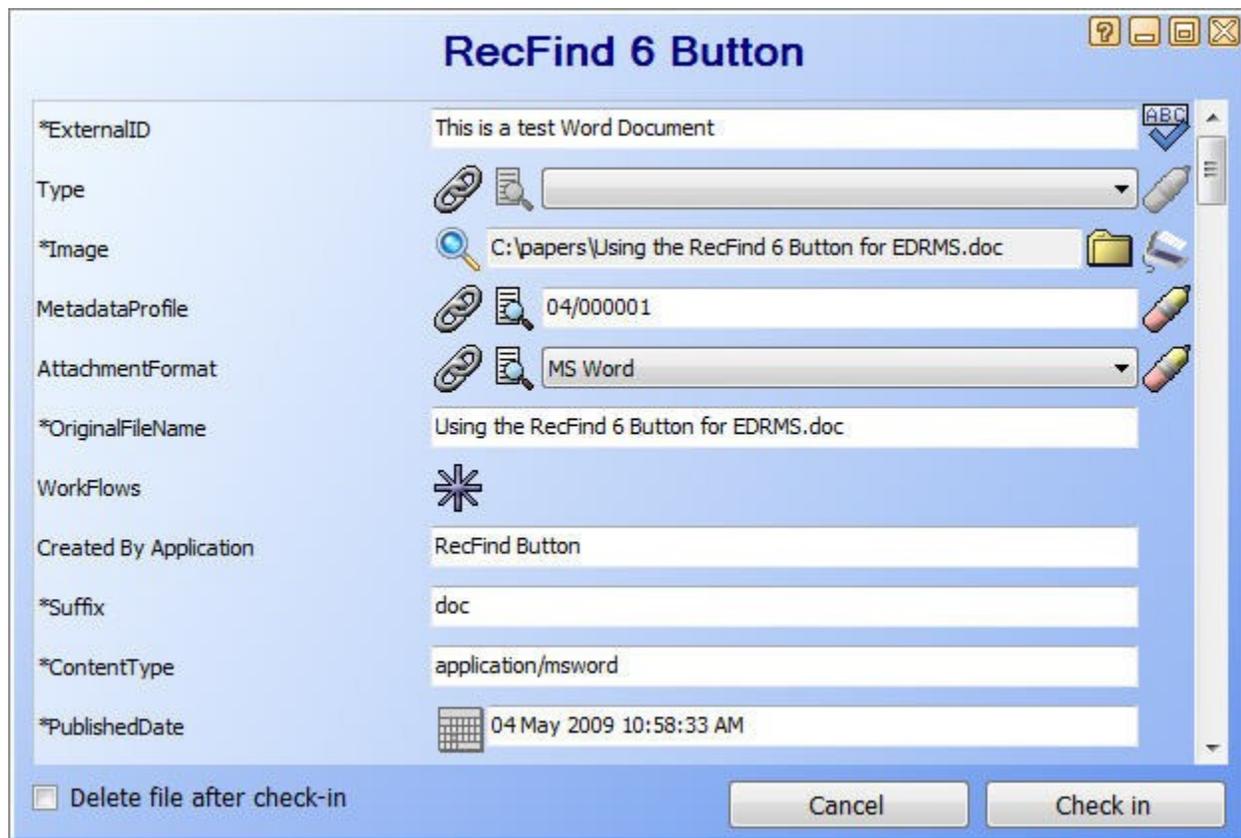
With RecFind 6 you determine exactly how much information you want the end user to enter.

Using the RecFind 6 Security system

The same security regime you set up for RecFind 6 users also governs the use of the Button. The end-user's security group determines what information he/she has access to in the RecFind 6 database when using the Button to either check-in or check-out electronic documents.

Summary

The RF6 Button is an extremely easy to use, low cost but powerful EDRMS tool. It is low cost to purchase and low cost to deploy and maintain. It is also 100% secure. It works over your LAN and your Intranet/the Internet. It captures electronic documents of any type and it scans paper documents using any TWAIN compatible scanner. There is no longer any excuse for not capturing electronic documents.



The screenshot shows the 'RecFind 6 Button' application window. The title bar reads 'RecFind 6 Button'. The window contains several input fields and controls:

- *ExternalID:** This is a test Word Document
- Type:** A dropdown menu with a document icon and a pencil icon.
- *Image:** A text field containing 'C:\papers\Using the RecFind 6 Button for EDRMS.doc' with a folder icon and a document icon.
- MetadataProfile:** A text field containing '04/000001' with a document icon and a pencil icon.
- AttachmentFormat:** A dropdown menu with 'MS Word' selected, a document icon, and a pencil icon.
- *OriginalFileName:** Using the RecFind 6 Button for EDRMS.doc
- WorkFlows:** A star icon.
- Created By Application:** RecFind Button
- *Suffix:** doc
- *ContentType:** application/msword
- *PublishedDate:** 04 May 2009 10:58:33 AM

At the bottom left, there is a checkbox labeled 'Delete file after check-in'. At the bottom right, there are two buttons: 'Cancel' and 'Check in'.

For more information on the RecFind 6 Button or any of Knowledgeone Corporation's products please go to our website at:

www.knowledgeonecorp.com

Or contact us at sales@knowledgeonecorp.com