

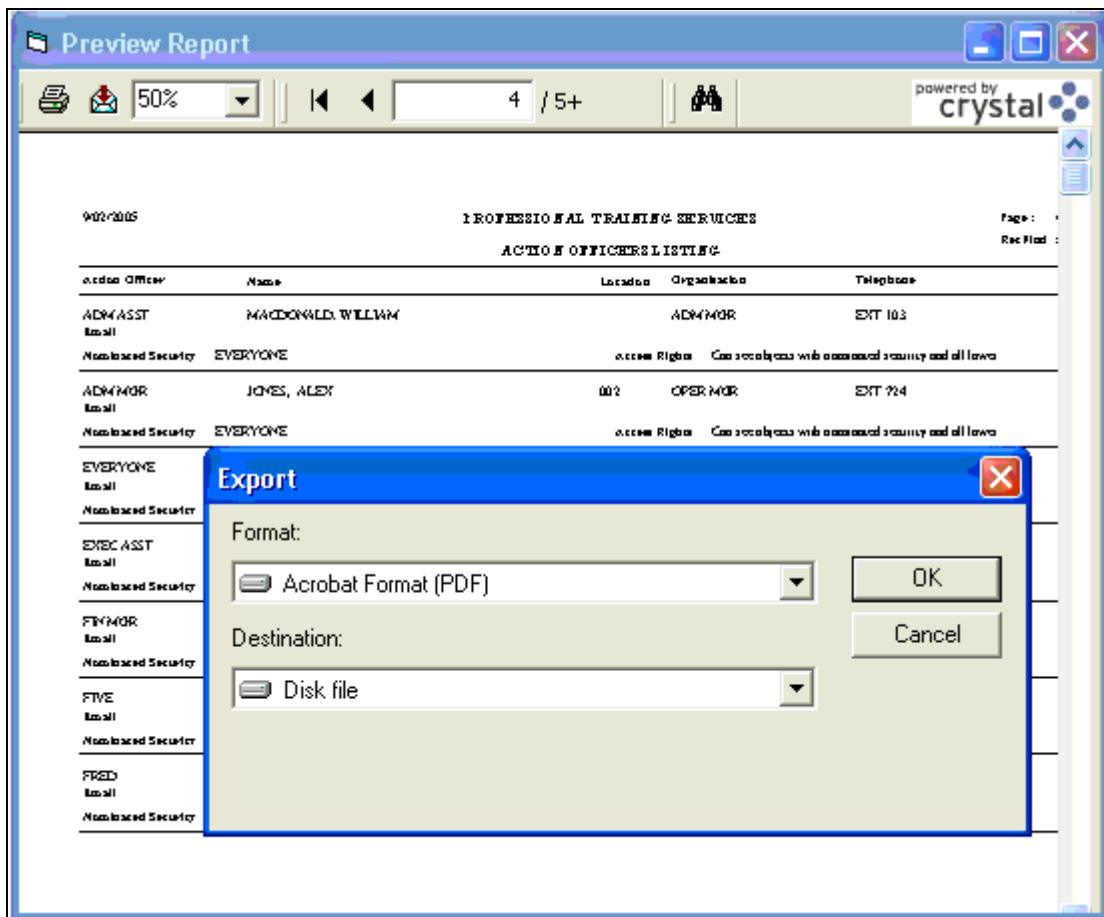
NEW MAJOR FEATURES

This section contains an overview of the new major features in RecFind 5.0.0E.

Crystal Reports 10

RecFind v5.0.0E sees the introduction of the latest Crystal Reports Runtime, version 10. This upgrade was primarily to accommodate users customizing the RecFind templates as older versions of Crystal are no longer in the market.

Although implementing Crystal Reports 10 was a major change, the user will only notice a few minor cosmetic differences to the report browser. The major addition is the ability to save a report as a PDF without any other software.

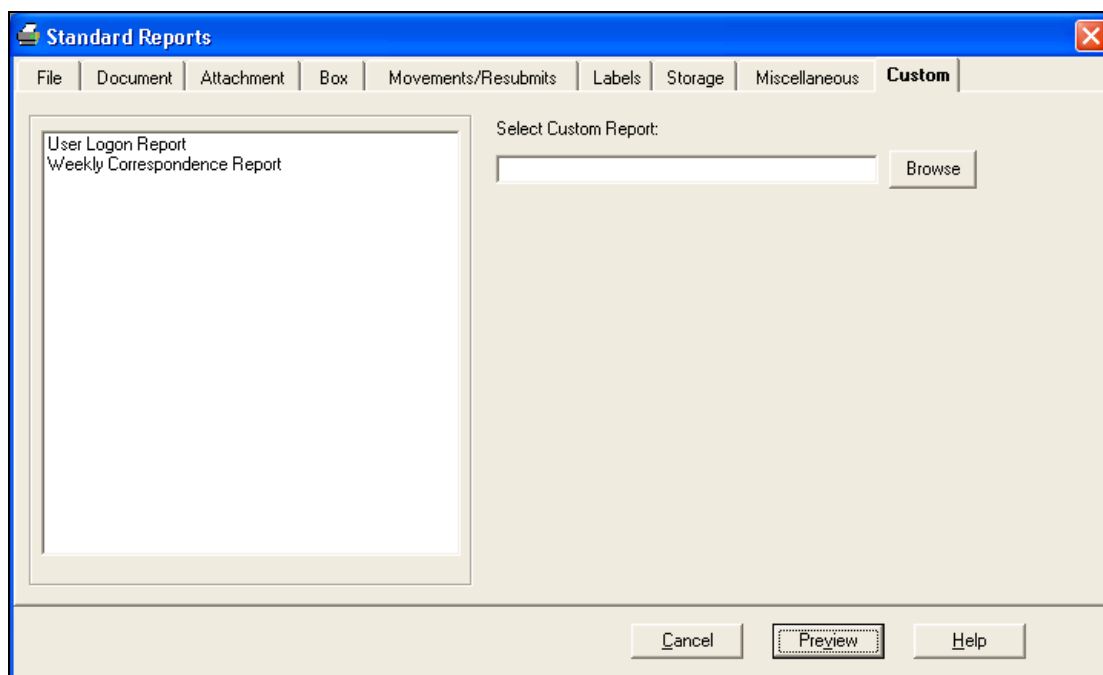


New Custom Tab in Reporting

For some time RecFind has included the ability for a customer to alter the standard RecFind report templates. This allowed cosmetic changes to be made to the templates such as re-formatting fields and modifying the position of fields.

For more specific reporting requirements, customers were required to use Crystal Reports and connect directly to the database. Although this was a suitable solution it remained difficult for your normal user to run these reports.

RecFind v5.0.0E will now allow users to run these reports directly from within the RecFind Reporting module without the need for any other software. A new tab in the Report module called Custom will display all custom reports.



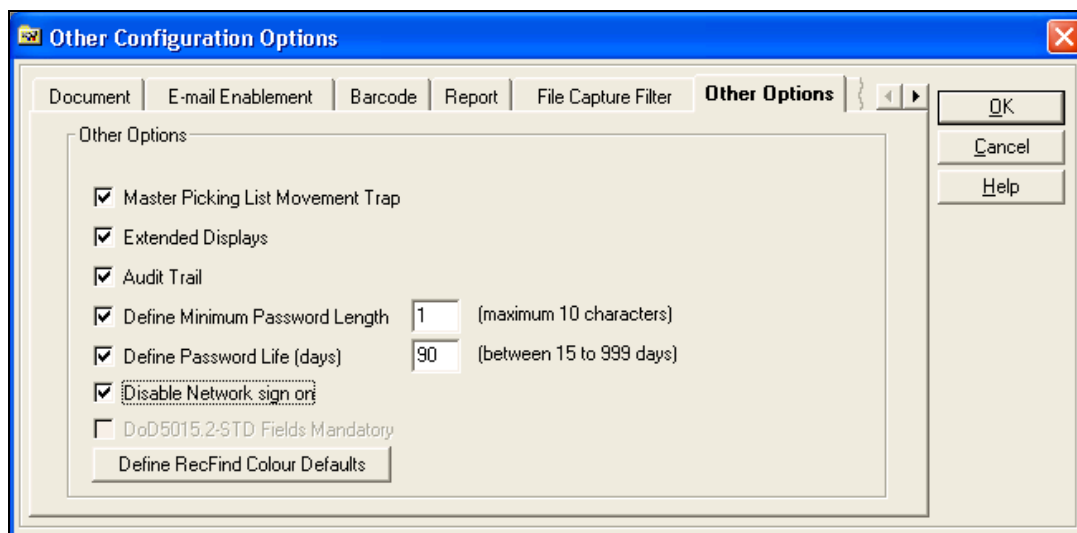
To use this feature, the Crystal Reports RPT files are copied to the USER sub-directory of the RecFind REPORTS directory (located in the RecFind application directory).

The reporting module will then display all files located in this directory when any user clicks on the Custom tab. If you wish to run a report but not have all users have access to it, you may use the browse button and select a template located elsewhere.

Disabling Automatic Sign-on

It is now possible to disable RecFind from automatically logging on a user when a RecFind ID is found to match the Windows logon name.

To disable this functionality, from the Admin toolbar select the Config module. Located on the 'Other options' tab you will find an option to "Disable automatic network signon".

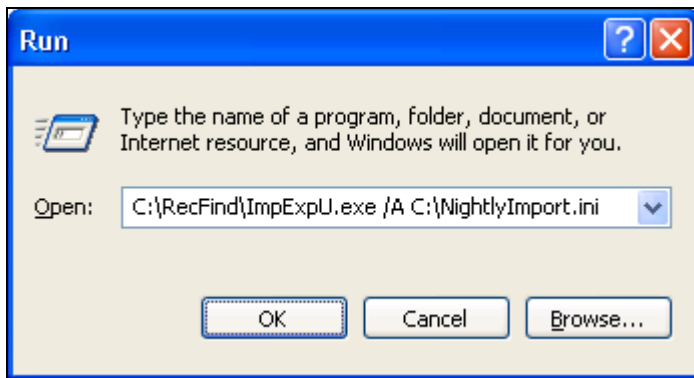


This is a global setting that affects all users regardless of their database.

Import/Export Utility Automation

The Import/Export Utility now allows the utility to be totally automated and not require any user interaction to run. This means that a daily import can be scheduled to run after-hours, or you can have a single short-cut perform a complex import operation.

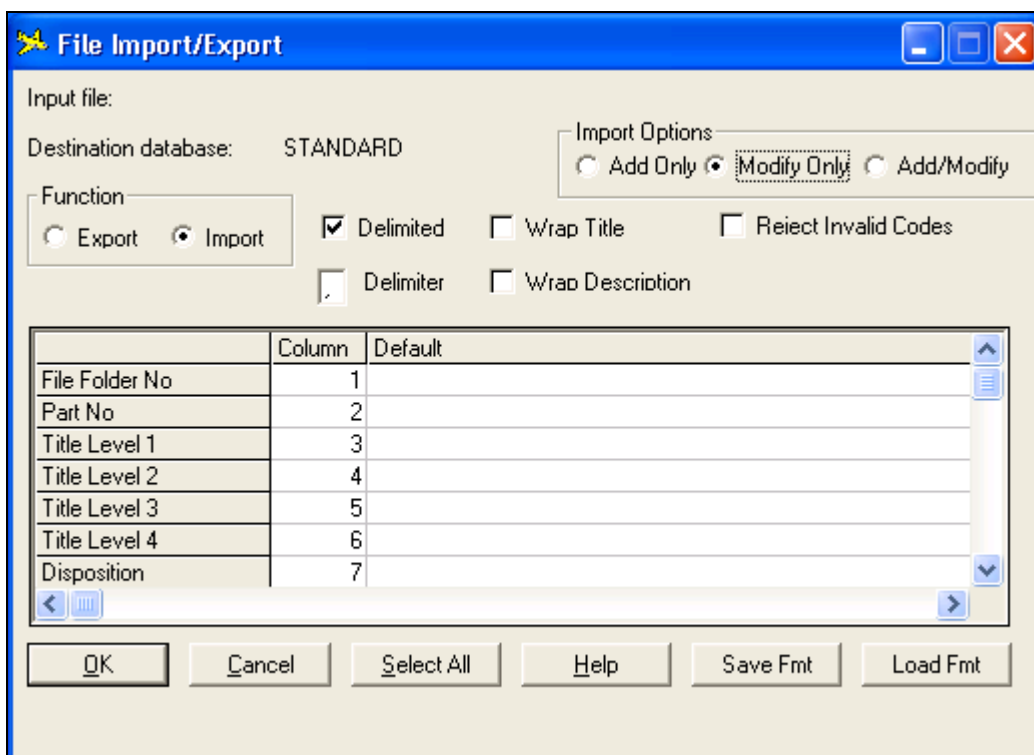
The automation is achieved by stored the necessary configuration options in an INI file and running the Import/Export Utility with the INI file specified as a command line option. The INI file is a simple text file containing the necessary options, link to the data files, format files and exception report file.



Full details of this feature are available in the online help.

Modify Data Using the Import/Export Utility

When performing an import, you now have the ability to update existing records. There are now three import options to select from, Add Only, Modify Only or Add/Modify.



If you select Add Only, the utility will function as it always has by adding a new record. If the specified registration number, box number or file number is found to already exist in the database, an error will be logged in the exception report.

If you select Modify Only, the utility will use the specified registration number, box number or file number to find an existing

record and then update any fields to match those included in the data file. If a record is specified but not found to already exist in the database, an error will be logged in the exception report.

Finally, if you select Add/Modify it will perform a combination of the above two options. If the specified registration number, box number or file number is not found, then a new record will be added. If the specified registration number, box number or file number is found, then it will be altered to match the new fields specified in the data file.

When modifying, you cannot remove a field value. If a field isn't included in the data file, it will not be modified to become blank, it is simply left as it is.

Full details of this feature are available in the online help.

Importing Workflow and Resubmit Information

When performing a document import or export, you now have the option of selecting Workflow fields, such as "Action Type", "Date Required", etc. You may also specify a "Procedure Name" to apply an action procedure set to the document.

Document Import/Export

Input file:

Destination database: STANDARD

Import Options:
 Add Only Modify Only Add/Modify

Function:
 Export Import

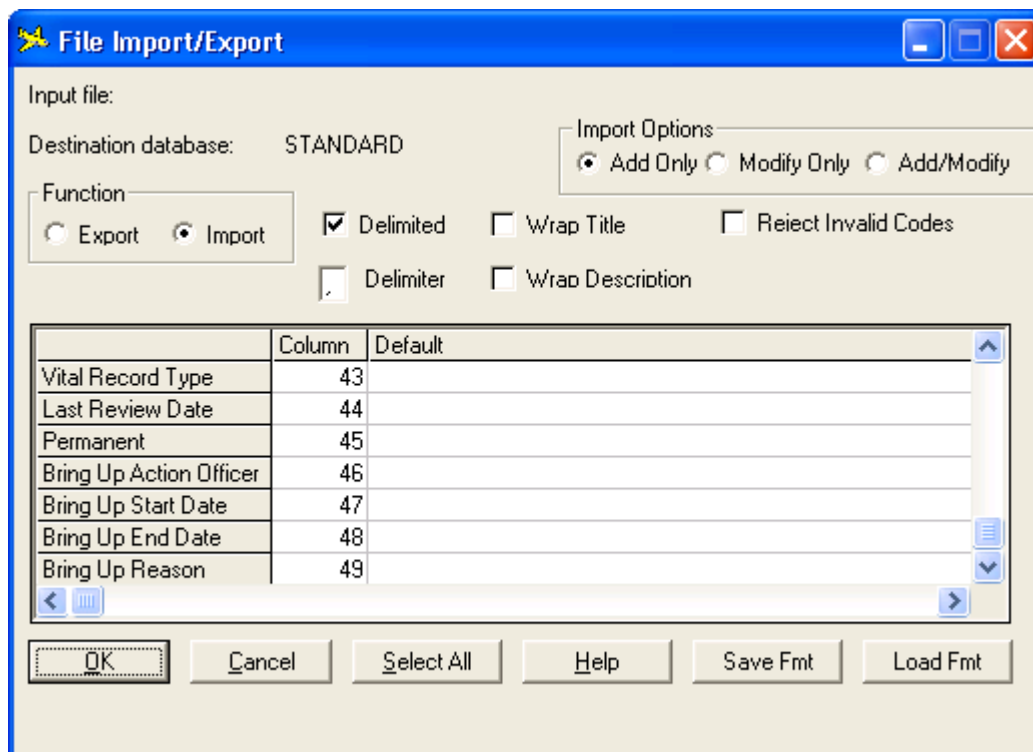
Delimited Reject Invalid Codes

Delimiter ,

	Column	Default
Procedure Name	44	
Action Type	45	
Action Description	46	
Action Delegator	47	
Workflow Action Officer	48	
Date Allocated	49	
Date Required	50	

OK Cancel Select All Help Save Fmt Load Fmt

When performing a file import or export, you also have the option of selecting the Resubmit fields, such as “Bring Up Action Officer”, “Bring Up Start Date”, etc.



Full details of this feature are available in the online help.