

Records Maintenance Training Notes

document version: 1.2.3
software version: 2.3.131
release date: Jun 2007



LG System Inc.

RECORDS MAINTENANCE

Training Notes

VERSION MATRIX

Release history for this document.

Release Date	Version	
5 Apr 2006	1.0.1	Initial document
13 Jul 2006	1.1.1	Content updated to match software version 2.02
3 Aug 2006	1.1.2	File request utility, file resubmit utility, report viewer, and MDI documentation incorporated.
23 Nov 2006	1.1.3	Clickonce documentation incorporated
1 May 2007	1.2.1	Partial rewrite and screen-shots updated to reflect software release version 2.3.131
15 May 2007	1.2.2	Information from RMAA Records Management Seminar added to reference section. Glossary terms updated and manual links rather than automatic links implemented.
12 June 2007	1.2.3	References to agendas removed from training exercises.

TABLE OF CONTENTS

Learning Outcomes.....	1
Files	1
Records	1
Entities.....	1
Links	1
Searching	1
Reports	2
File Tracking.....	2
Office Interconnectivity	2
Request and Resubmit Utilities	2
How to Add or Edit Files	3
How to Add a Record	7
How to Add an Entity	12
How to Run Reports.....	14
Searching	16
File Tracking.....	17
Glossary	21
Index	29

LEARNING OUTCOMES

During this topic you will learn about:

- o creating a file
- o creating a record
- o creating and editing an entity
- o creating and editing links
- o searching records
- o producing record's reports
- o using the file tracking facility
- o using the Microsoft Office interconnectivity features
- o using the Request Utility and Resubmits Utility

This workbook contains excerpts from the Records Maintenance user's manual to help you understand the above processes.

Files

In the files section you will learn about file numbering, using descriptive fields, and using the Records Maintenance program to manage your records in a filing system complying with GDS20 requirements.

Records

In the records section you will learn about entering records into the system and assigning the record to responsible officer.

Entities

In the entities section you will learn how to create and edit entities, and how to create, edit, and assign addresses.

Links

In the links section you will learn about linking records to electronic data on local computers and networks.

Searching

In the search section you will learn how to search for records stored in the Records Maintenance database.

Reports

In the reports section you will learn how to run reports from the database, including using parameters to filter output.

File Tracking

In the tracking section you will learn how to use the Records Maintenance program to request, book out, and resubmit files.

Office Interconnectivity

In the interconnectivity section you will learn how to use the program to link with Microsoft Outlook and manage your record's related workload.

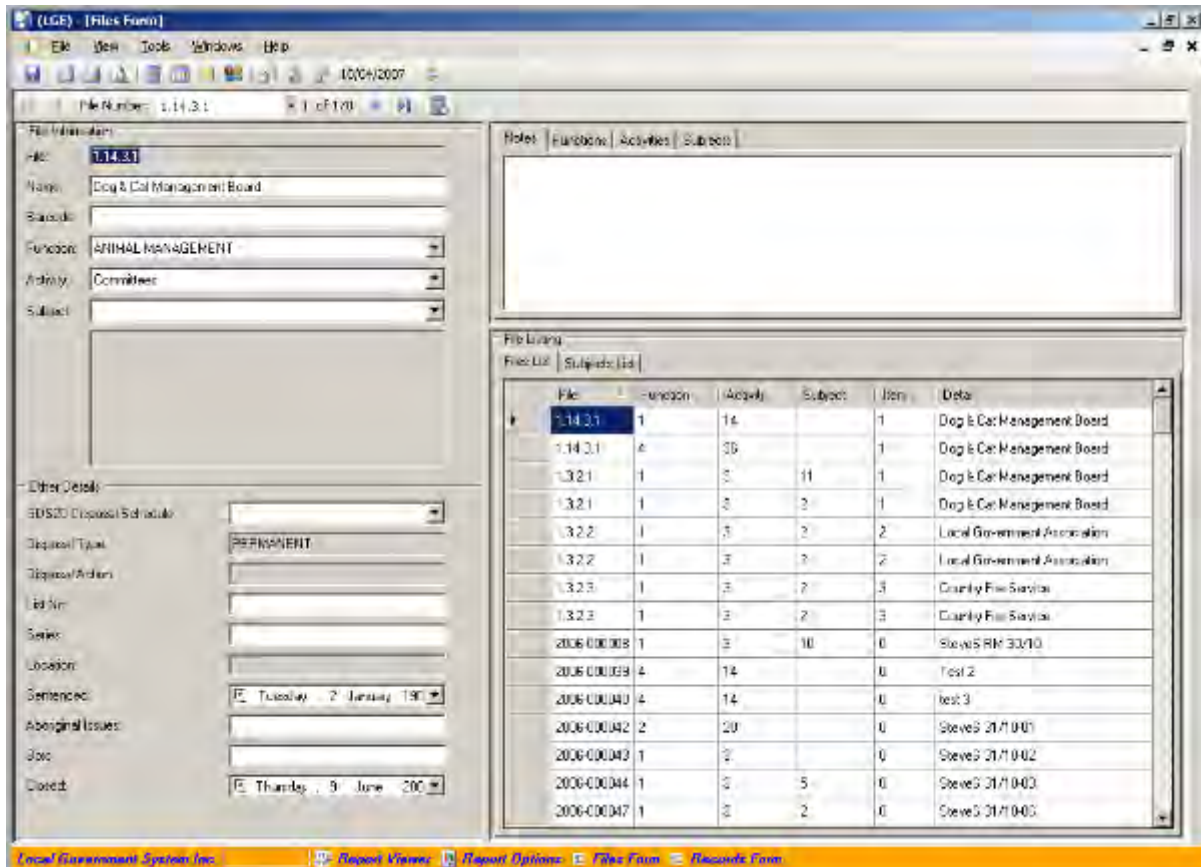
Request and Resubmit Utilities

In the utilities section you will learn about the tools available to staff who don't have the full Records Maintenance program.

This training session is for your benefit. To get the most from it ask questions, take part in any activities, and, above all, enjoy yourself.

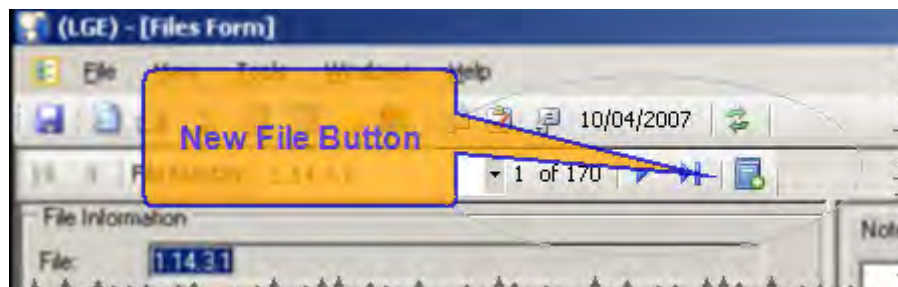
HOW TO ADD OR EDIT FILES

Files are containers for records. A good file structure makes accessing and maintaining your records much easier.



To add a file:

1. Click the add new file button on the file browser
The files form opens showing a newly created file.



2. Give the file a name. The file name is to make it easier to identify the file's contents and will show in the file view window after the file number.
3. Select a function from the items in the drop down list

File Information

File: 1.14.3.1

Name: Dog & Cat Management Board

Barcode:

Function: ANIMAL MANAGEMENT

Activity: Committees

Subject:

4. Select an activity from the drop down list
5. Select a subject from the drop down list
6. Add a number in the item number field

The item number is set by the user and usually is the next number in the series. For example, if you are filing under Animal Management - Advice - Records Relating to Advice and files numbered to 8 have been created, the next file is number 9. The complete file number would be 1.3.3.9.

The file number field at the top of the file information area changes to reflect your choices. Note that the file number is a composite of the function, activity, subject, and item number. You can change the file number to your own numbering system at anytime before you save the file.

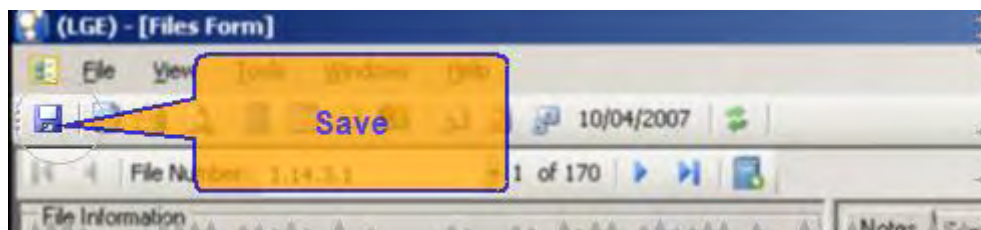
7. Add data to the other data fields as necessary
 - a. Select the GDS 20 number from the drop down list.
 - b. Click the sentenced check box to mark the file for destruction
 - c. Select the sentence date

In the other details area there are extra fields provided for GDS 20 disposal schedule, disposal type, disposal action, list number, series, location, sentenced and date sentenced, aboriginal issues, box, and date closed.

8. Click the notes tab to add file notes
9. Click the functions, activities, and subjects tabs if you need more information for file classification

The functions, activities, and subject tabs provide a description of the items selected in the drop down lists in steps 2, 3, and 4 above. If you make a mistake, select again. Use the drop down list on the tabs or the browse buttons to move through the choices. A new function, activity, or subject is added by clicking the add button on the browser and entering details in the name and description fields.

10. Click the save button on the toolbar to save your file



Exercise:

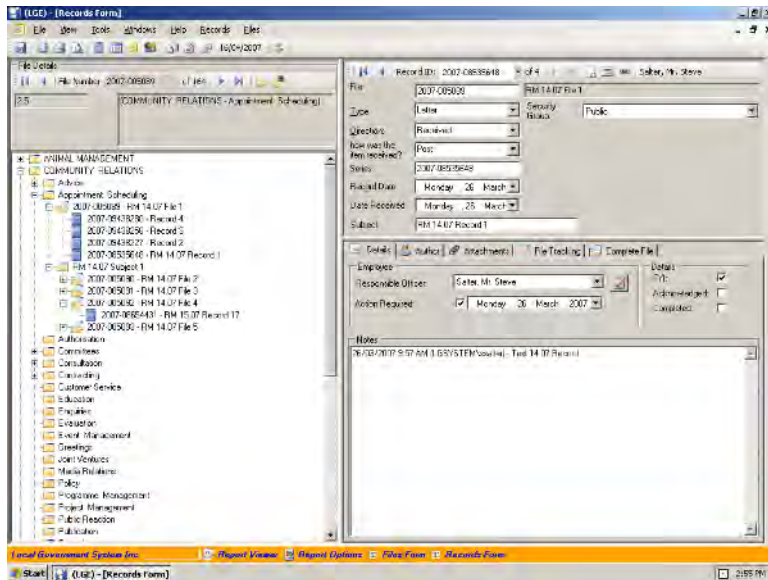
1. Create a new file. File it in "Information Management", activity "Compliance", subject "Records relating...." (it's the only one), and the item number should be the next in sequence
2. Add details and change the file date to yesterday's date

Normally you would use today's date!

3. Add some notes to the notes field
4. Save your file

HOW TO ADD A RECORD

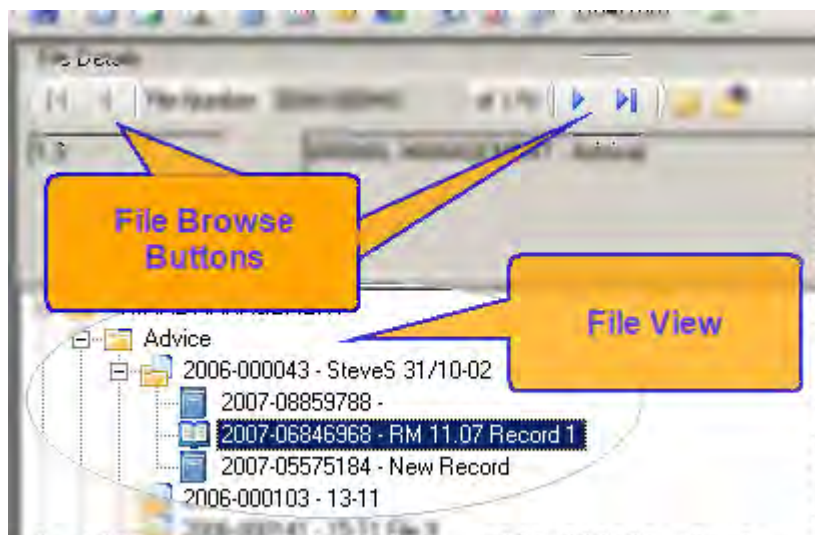
Records are the main focus of the Records Maintenance program.



The workflow for adding a record is: identify the file for the record; enter the record; and attach an entity (contact).

To add a record to an existing file, follow these steps:

1. Allocate the record to a file:
 - a. Find an existing file using the file browser or locate it in the file view



Or,

- b. Create a new file

See "How to Add or Edit Files" on page 3

2. Click the new record icon on the records browser



3. Enter the type of record, this can be selected from the choices provided in the drop down list or you may add your own
The choices are letter, memo, email, form or photograph.

A screenshot of a record entry form. The form has a title bar with 'Record ID: 2007-06846968' and 'of 3'. The user name 'Salter, Mr. Steve' is visible in the top right. The form contains several fields: 'File' (2006-000043), 'Type' (Letter), 'Direction' (Received), 'how was the item received?' (Post), 'Series' (2007-06846968), 'Record Date' (Friday, 9 March), 'Date Received' (Friday, 9 March), and 'Subject' (RM 11.07 Record 1). There is also a 'Security Group' dropdown menu set to 'Public'.

4. Enter the record's information flow direction
The choices are received or sent.
5. Enter how the record arrived
The choices are post, email, counter, courier, or registered post.
6. Enter a series number
The normal choice for series number is the record ID number, but you can use this field to track a series of records linked by a number you choose.
7. Enter a record date
The record date is the date on the record.
8. Enter the received date
9. Enter a subject

The subject is used as a meaningful name for the record, along with the record number, when it's displayed in the file view.

10. Click the details tab

11. Enter record details

- a. Click the FYI check box if you want to flag the record "for your information"
- b. Click the acknowledged check box to flag the record as acknowledged
- c. Click the completed check box to show tasks for the record have finished
- d. Select the responsible officer from the drop down list if the record has to be assigned to someone. Click the task button to add the record to the responsible officer's tasks
- e. Click the action required check box and select the required by date to assign a deadline for the task
- f. Add notes about the record to the notes field

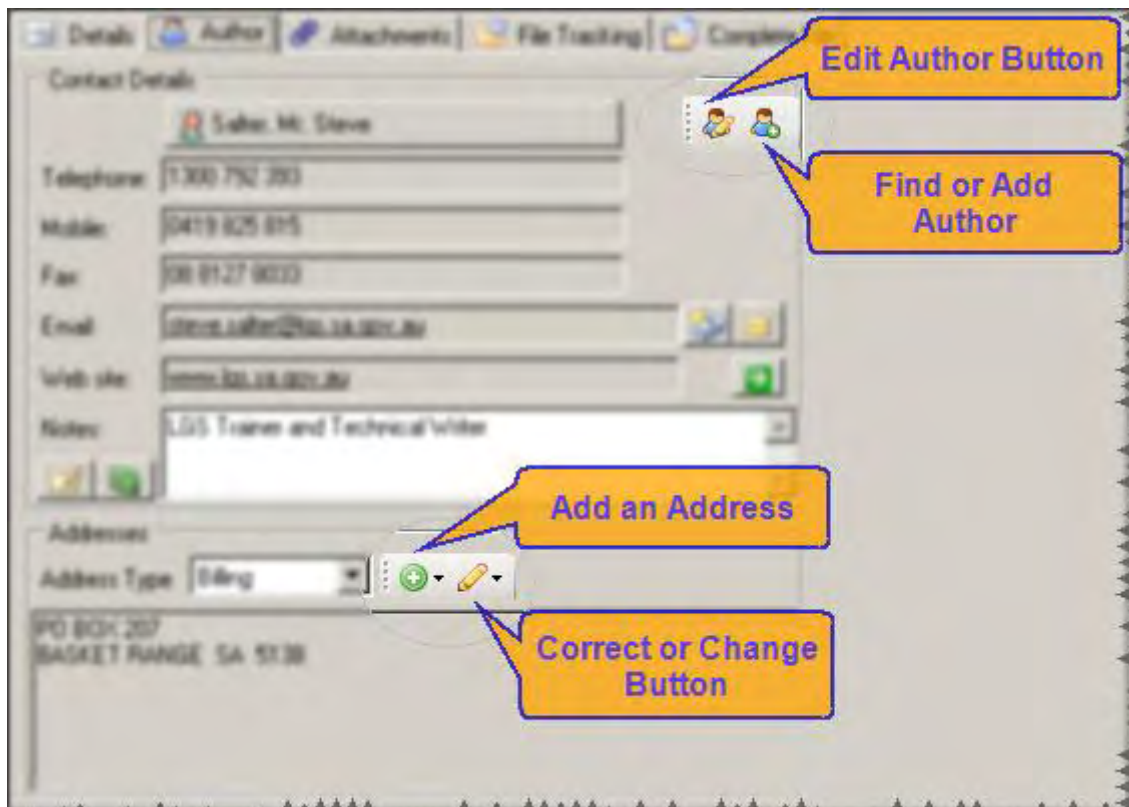
Anything added to the notes field can be searched using the keyword search report.

The screenshot shows a software interface with a tabbed menu at the top containing 'Details', 'Author', 'Links', 'File Tracking', and 'Complete File'. The 'Details' tab is active. Below the tabs are three main sections: 'Agenda Details', 'Employee', and 'Notes'. In the 'Agenda Details' section, there is an 'Include:' dropdown menu showing 'Wednesday, 3 May 2006', a 'Page:' input field, and three checkboxes: 'FYI:', 'Acknowledged:', and 'Completed:'. In the 'Employee' section, there is a checked 'Responsible Officer:' dropdown menu showing 'BURGER, STEVEN JAMES', an 'Action Required:' dropdown menu showing 'Wednesday, 21 June 200', and a task button icon. In the 'Notes' section, there is a text area containing the word 'Only'.

12. Click the author (contact) tab

- a. Click the find or add author button to open the search dialog.

The format for names is surname, title, given names with a comma separating the surname and title.

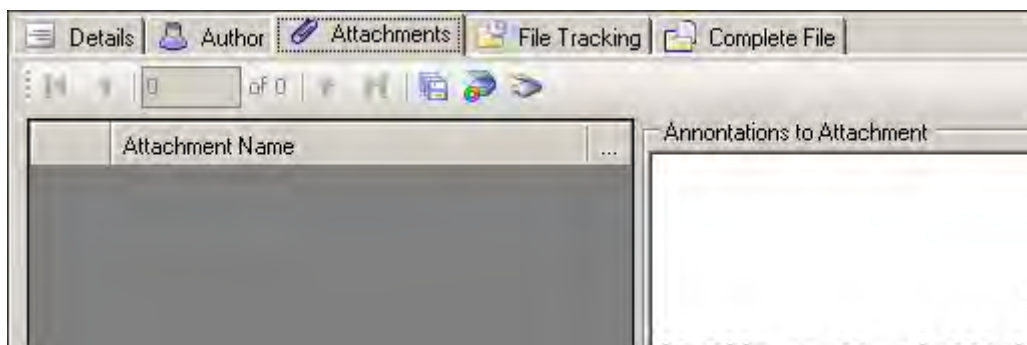


- b. Click the edit author button if you need to change entity (contact) details
- c. Click the address correct or change button if you need to change address details

Different address types can be selected. Types include street, postal, delivery, billing, and voting. You have the option of correcting the existing address or changing it completely.

- d. click the address add button to add a new address for the contact

13. Click the attachments tab



14. Add any attachments to the file

You can add files from either your PC or network, or scan directly into the Records Maintenance program. Once an attachment is added it won't be affected by moving or deleting the original.

- a. To add a local or network file click the import file button, browse to the file and save.

Clicking this button will open the standard Windows attach file dialog box.

b. To scan an attachment, click the scan button.

If your scanner isn't in the list, click the add scanner button to register it with Records Maintenance

15. Click the save button on the records toolbar

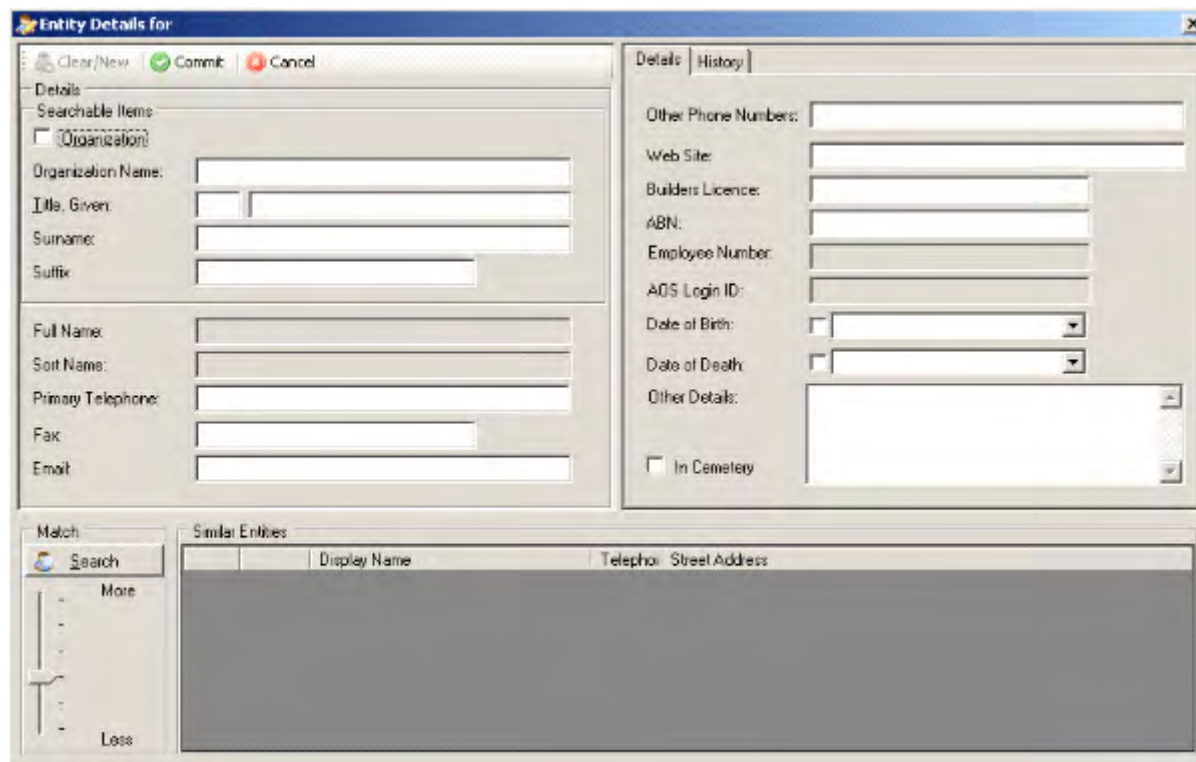
If you make a mistake, click the cancel changes button instead.

Exercise

1. Create a new record
2. Enter a record type, direction, how received, series identifier, received date, and VG number
3. Select an author for the record by searching for the name Clayton
4. Add a link to a file on your local machine, followed by a link to a network file
5. Save the record
6. Create another record, this time from a new contact.
7. Create a street and postal address for the contact.

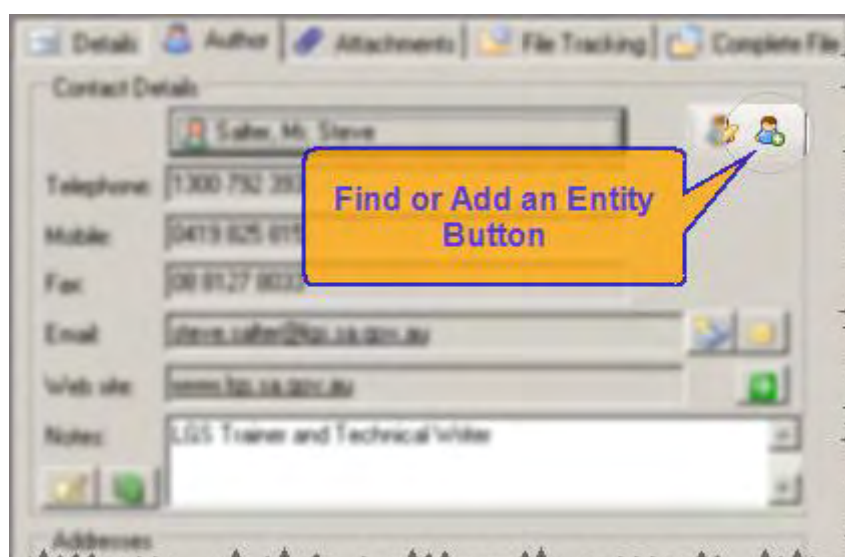
HOW TO ADD AN ENTITY

Entities, also known as authors or contacts, are the people and organisations that interact with your organisation. Employees are a special type of entity, and have to be added so the integration with Microsoft Outlook works properly.



To add an entity to your system:

1. Click the find or add a person or organisation button on the author tab in Records Maintenance



The entity form will open.

2. Enter the entity's surname in the surname box

The more information you add, the better the search results. If the entity is an organisation, click the organisation check box and enter the organisation name.

3. Click the Search button

The application will search the entity database and provide a series of closely matched entries. This step will help reduce duplicate entries in your contacts.

4. Check the similar entries and

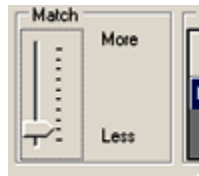
- a. Click the entity you wish to use in the similar entries grid, then click the commit button to use the contact

Or, if you can't find the entity

- b. Enter the entity's details and click the commit button to enter the contact in the entity table and use him as the current record's author

If you provide an email address, you will be able to email the contact directly from within all LG System Inc. programs with a simple button click.

The match slider control adjusts the sensitivity of the similar entries search. If you adjust it by dragging the button, the search is repeated using the new sensitivity. Moving the control towards "More" will return more matches but they may not be as close to the name you entered.



Exercise:

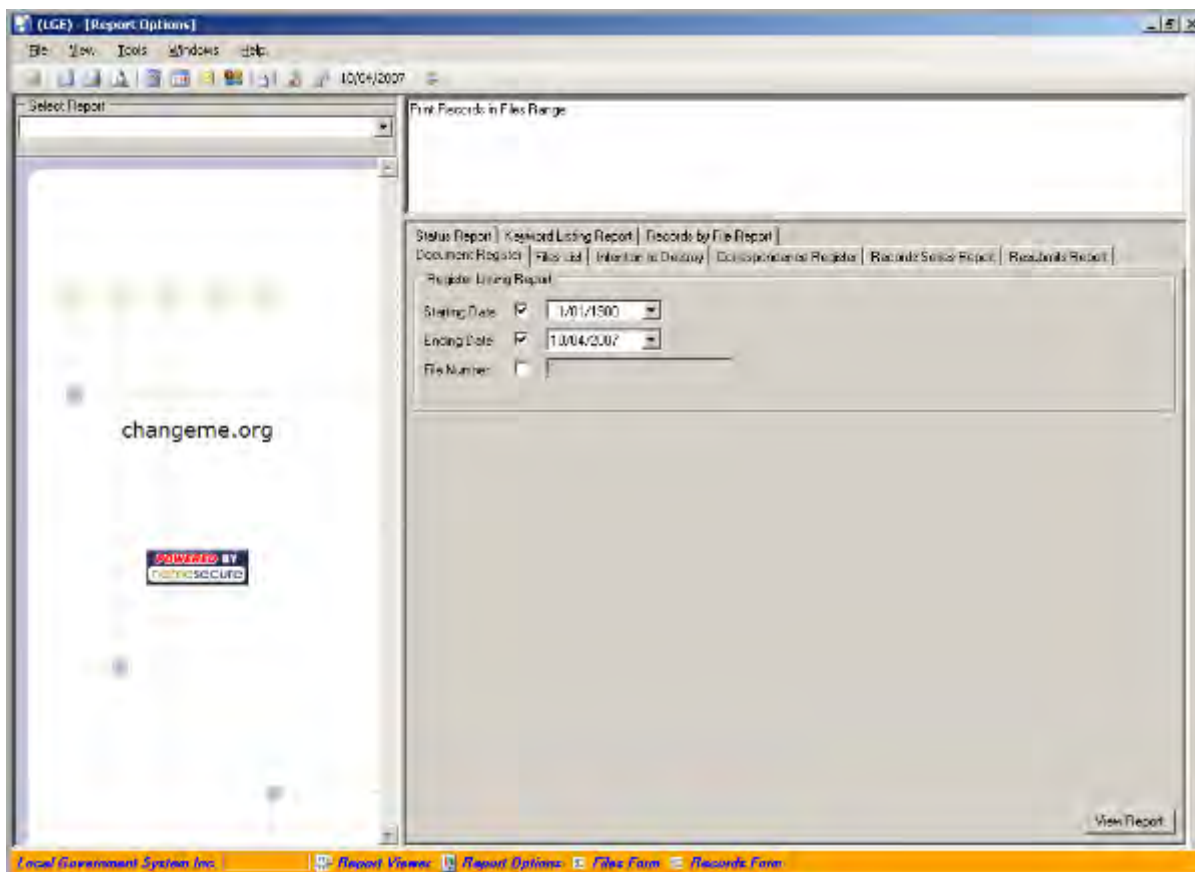
1. Create a new entity
2. When you have entered the entity's name, search for similar names

For this exercise don't worry if a near match is found

3. Add entity street address
4. Add entity postal address
5. Save entity
6. Go back to the street address and enter an address change
7. Save entity

HOW TO RUN REPORTS

Records Maintenance has a variety of reports to extract formatted information.



To run a report:

1. Click on the report options button on the orange status bar at the bottom of screen



The reports screen will open.

2. Select the report from the tabs

The choices are: document register, files list, intention to destroy, correspondence register, records series report, status report, keyword listing report, and records by file report.

As you click on each tab, a description of the report shows in the description area.

3. Provide report parameters by selecting the check boxes. In general:
 - a. Dates can be selected from the drop down calendar
 - b. When a check box is not selected, the text box beside it becomes greyed out and check box contains a wildcard (*) symbol to indicate all values
4. Click the view report button at bottom right

While the report is running you will see an animation displaying progress.



Report is being generated

The report viewer opens, showing the selected report.

Record	Type	Name	Date	Doctype	Subject	File
2006-31036382		SteveS test	6/11/2006 10:06:22 AM	Letter	Mug shot	2006-000047

5. Click on the records form button on the status bar to return to the Records Management screen

Exercise

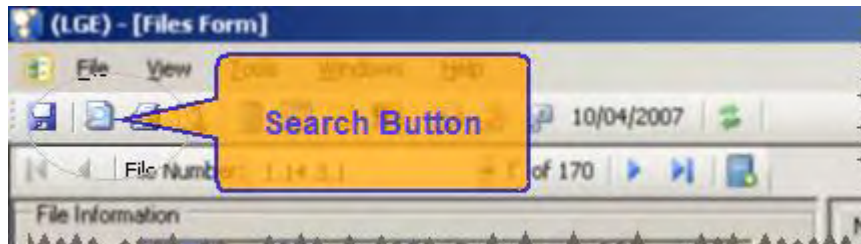
1. Run a keyword listing report using a word entered in the notes section in the previous exercise
2. Run a correspondence register report for the entity "Gillan, Ian"

SEARCHING

Records Maintenance has a powerful search facility.

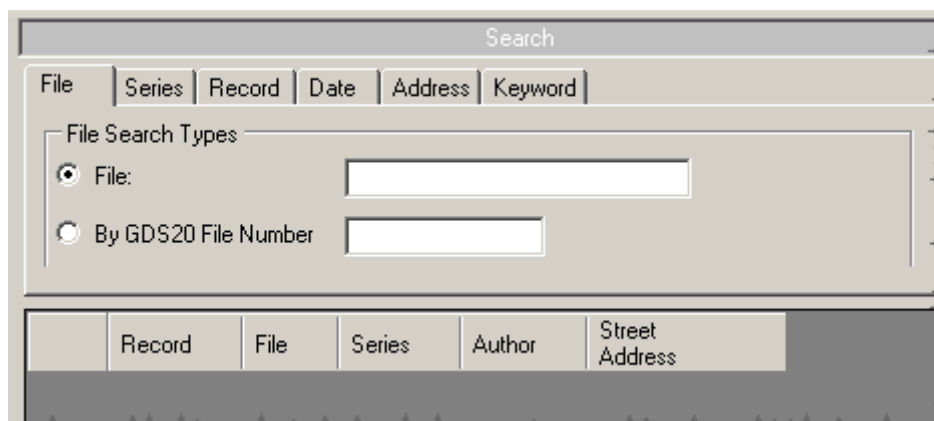
To conduct a search:

1. Click the search button on the main toolbar



The search window will open on the right of screen, resizing the records form.

2. Select from file, series, record, date, address, or keyword searches by clicking the search tabs.



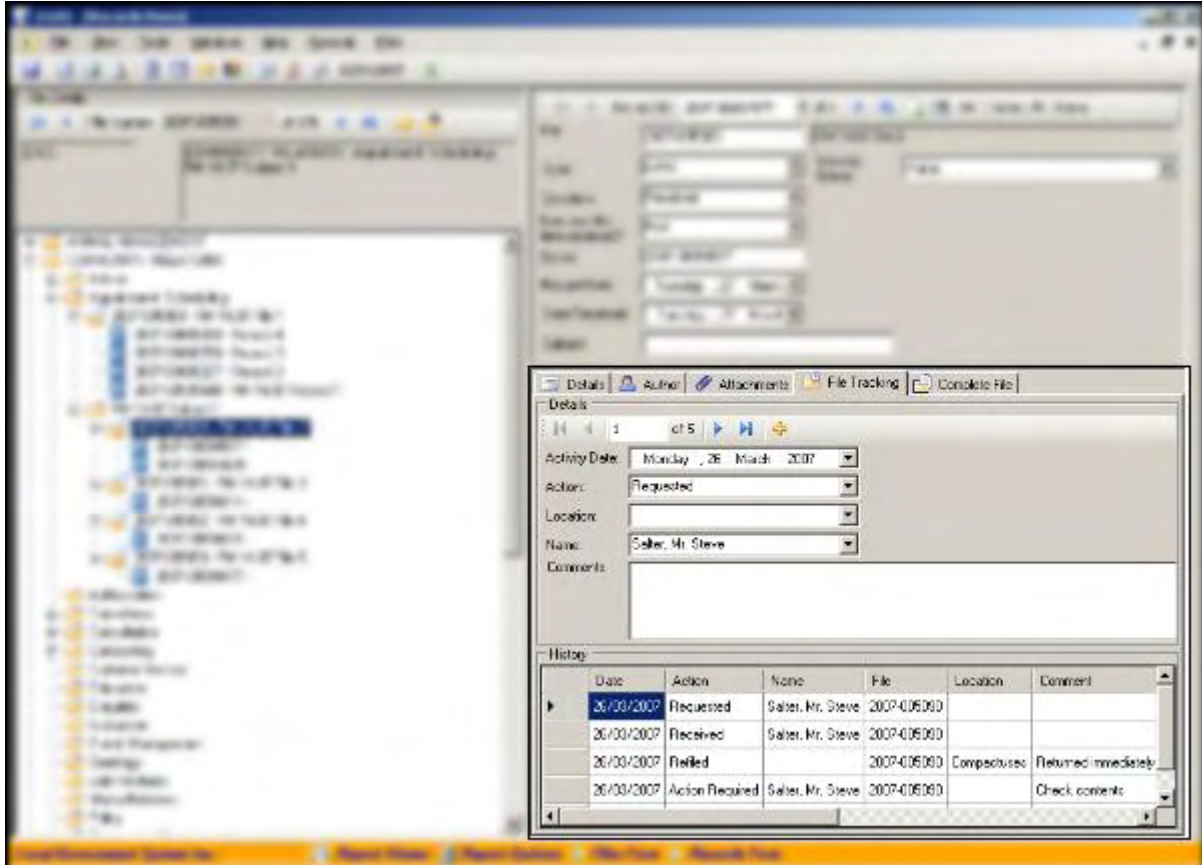
3. Enter parameters for your search and click the search button
If you click cancel, the search screen closes and the entry form returns to its original size.
4. Select the search result that matches your needs in the and click the select button

Exercise:

Use the search facility to locate the file "Information Management", activity "Compliance", subject "Records relating...." and item you created in the files exercise

FILE TRACKING

If you want to request a file, show a file as received, show a file as re-filed, flag a file as action required, or show a file as "actioned" you can use the records management program or one of the utilities. These instructions are for the Records Maintenance program:

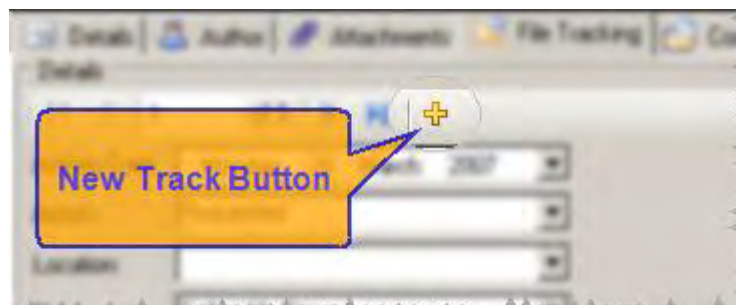


1. Click the file tracking tab in records management

	Date	Action	Name	File	Location	Comment
▶	26/03/2007	Requested	Salter, Mr. Steve	2007-005090		
	26/03/2007	Received	Salter, Mr. Steve	2007-005090		
	26/03/2007	Refiled		2007-005090	Compactuses	Returned immediately
	26/03/2007	Action Required	Salter, Mr. Steve	2007-005090		Check contents

2. Click the add new button

A new tracking record is created and shown in the history section.



3. Add the activity date from the date combo box

The default value is the current date. If you wish to change it, select a date from the calendar.

4. Select an action from the drop down list

The provided values are action required, actioned, received, requested or re-filed.

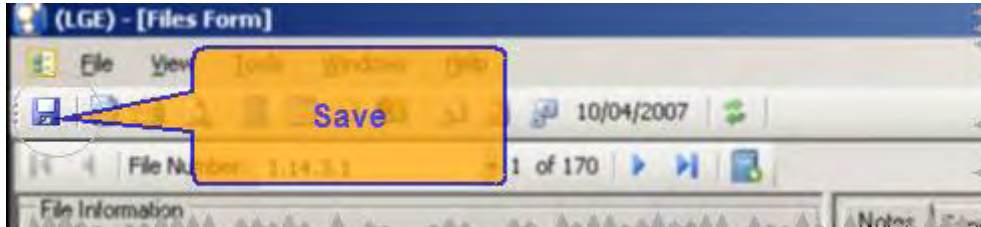
5. Add a location

The provided values are checked out, compactuses, archived, or destroyed. You can add a different location by typing it into the list box. Typed entries are saved for the current record, but won't appear in the default values.

6. Select a name from the drop down list

The drop down list contains all the employees. The logged on user is the default value.

7. Add any notes about the transaction in the comments field
8. Save the transaction by clicking the save button at the top of the screen.



Exercise

1. Create a request for a file
2. Create a "received" transaction for the file
3. Create a "resubmit" transaction for the file

GLOSSARY

ANSI

ANSI: 1. Acronym for American National Standards Institute. A voluntary, non-profit organisation of business and industry groups formed in 1918 for the development and adoption of trade and communication standards in the United States. ANSI is the American representative of ISO (the International Organization for Standardization). Among its many concerns, ANSI has developed recommendations for the use of programming languages including FORTRAN, C, and COBOL, and various networking technologies. 2. The Microsoft Windows ANSI character set. This set includes ISO 8859/x plus additional characters. This set was originally based on an ANSI draft standard. The MS-DOS operating system uses the ANSI character set if ANSI.SYS is installed.

attachment

Attachment: Digitised document or computer file that is saved with the record.

attachments

Attachment: Digitised document or computer file that is saved with the record.

batch file

batch file: An ASCII text file containing a sequence of operating-system commands, possibly including parameters and operators supported by the batch command language. When the user types a batch file name at the command prompt, the commands are processed sequentially. Also called: batch program.

check box

Check Box: (Windows Control) An interactive control often found in graphical user interfaces. Check boxes are used to enable or disable one or more features or options from a set. When an option is selected, an x or a check mark appears in the box.

check boxes

Check Box: (Windows Control) An interactive control often found in graphical user interfaces. Check boxes are used to enable or disable one or more features or options from a set. When an option is selected, an x or a check mark appears in the box.

combo box

Combo Box: (Windows Control) A combo box is a control with pre-defined content in list form. Unlike a list box the content cannot be changed by the user.

combo boxes

Combo Box: (Windows Control) A combo box is a control with pre-defined content in list form. Unlike a list box the content cannot be changed by the user.

counter

Counter: (Delivery Method) When the document is handed directly to the counter, unless delivered by a courier

courier

Courier: (Delivery Method) When a courier delivers the document

CSV

CSV: Acronym for comma separated values. Filename extension assigned to text files containing tabular data of the sort stored in database fields.

desktop

Desktop: (Operating System). An on-screen work area that uses icons and menus to simulate the top of a desk. A desktop is characteristic of the Apple Macintosh and of windowing programs such as Microsoft Windows. Its intent is to make a computer easier to use by enabling users to move pictures of objects and to start and stop tasks in much the same way as they would if they were working on a physical desktop. See also graphical user interface.

dialog

Dialog Box: (Windows Control). In a graphical user interface, a special window displayed by the system or application to solicit a response from the user.

dialog box

Dialog Box: (Windows Control). In a graphical user interface, a special window displayed by the system or application to solicit a response from the user.

directories

Directory: (Operating System). 1. A catalogue for filenames and other directories stored on a disk. A directory is a way of organising and grouping the files so that the user is not overwhelmed by a long list of them. The uppermost directory is called the root directory; the directories within a directory are called subdirectories. Depending on how an operating system supports directories, filenames in a directory can be viewed and ordered in various ways—for example, alphabetically, by date, by size, or as icons in a graphical user interface. What the user views as a directory is supported in the operating system by tables of data, stored on the disk, that indicate characteristics and the location of each file. In the Macintosh and Windows 9x operating systems, directories are called folders. 2. On a network, an index of names and pertinent information related to authorized users and network resources.

directory

Directory: (Operating System). 1. A catalogue for filenames and other directories stored on a disk. A directory is a way of organising and grouping the files so that the user is not overwhelmed by a long list of them. The uppermost directory is called the root directory; the directories within a directory are called subdirectories. Depending on how an operating system supports directories, filenames in a directory can be viewed and ordered in various ways—for example, alphabetically, by date, by size, or as icons in a graphical user interface. What the user views as a directory is supported in the operating system by tables of data, stored on the disk, that indicate characteristics and the location of each file. In the Macintosh and Windows 9x operating systems, directories are called folders. 2. On a network, an index of names and pertinent information related to authorized users and network resources.

DNS

*DNS: 1. Acronym for Domain Name System. The hierarchical system by which hosts on the Internet have both domain name addresses (such as *bluestem.prairienet.org*) and IP addresses (such as *192.17.3.4*). The domain name address is used by human users and is automatically translated into the numerical IP address, which is used by the packet-routing software. DNS names consist of a top-level domain (such as *.com*, *.org*, and *.net*), a second-level domain (the site name of a business, an organization, or an individual), and possibly one or more sub-domains (servers within a second-level domain). 2. Acronym for Domain Name Service. The Internet utility that implements the Domain Name System. DNS servers, also called name servers, maintain databases containing the addresses and are accessed transparently to the user.*

drop down list

Drop Down List: (Windows Control) A control where clicking an arrow causes a list of values to appear. The list is pre-populated and cannot be edited.

email

Email: (Document, Delivery Method) Electronic mail delivery

eMail

Email: (Document, Delivery Method) Electronic mail delivery

entities

Entity: An entity is a person, organisation, etc., who sends or receives a record.

entity

Entity: An entity is a person, organisation, etc., who sends or receives a record.

field

*Field: (Database Term). A location in a record in which a particular type of data is stored. For example, *EMPLOYEE-RECORD* might contain fields to store *Last-Name*,*

First-Name, Address, City, State, Zip-Code, Hire-Date, Current-Salary, Title, Department, and so on. Individual fields are characterized by their maximum length and the type of data (for example, alphabetic, numeric, or financial) that can be placed in them. The facility for creating these specifications usually is contained in the data definition language (DDL). In relational database management systems, fields are called columns.

fields

Field: (Database Term). A location in a record in which a particular type of data is stored. For example, EMPLOYEE-RECORD might contain fields to store Last-Name, First-Name, Address, City, State, Zip-Code, Hire-Date, Current-Salary, Title, Department, and so on. Individual fields are characterized by their maximum length and the type of data (for example, alphabetic, numeric, or financial) that can be placed in them. The facility for creating these specifications usually is contained in the data definition language (DDL). In relational database management systems, fields are called columns.

file

File: The record management files are the "containers" which hold the records.

file browser

File Browser: A tool for moving between files, adding, and editing files

file request

File Request: The process of requesting an action that sees the file travel to the officer for a task.

files

File: The record management files are the "containers" which hold the records.

folder

Folder: (Operating System). In the Mac OS, 32-bit versions of Windows, and other operating systems, a container for programs and files in graphical user interfaces, symbolised on the screen by a graphical image (icon) of a file folder. This container is called a directory in other systems, such as MS-DOS and UNIX. A folder is a means of organizing programs and documents on a disk and can hold both files and additional folders. It first appeared commercially in Apple Computer's Lisa in 1983 and in the Apple Macintosh in 1984. See also directory.

folders

Folder: (Operating System). In the Mac OS, 32-bit versions of Windows, and other operating systems, a container for programs and files in graphical user interfaces, symbolised on the screen by a graphical image (icon) of a file folder. This container is called a directory in other systems, such as MS-DOS and UNIX. A folder is a means of organizing programs and documents on a disk and can hold both files and additional folders. It first appeared commercially in Apple Computer's Lisa in 1983 and in the Apple Macintosh in 1984. See also directory.

form

Form: (Document) A form is a document created by your organisation where a person fills in the details as laid out in the form

FTP

FTP: 1. Acronym for File Transfer Protocol, a fast, application-level protocol widely used for copying files to and from remote computer systems on a network using TCP/IP, such as the Internet. This protocol also allows users to use FTP commands to work with files, such as listing files and directories on the remote system. 2. A common logon ID for anonymous FTP.

full-text search

Full-text Search: The ability to search an entire Help system for a particular word or keyword.

GDS 20

GDS 20: GENERAL DISPOSAL SCHEDULE 20. *The State Records Act 1997 provides for the preservation and management of official records. GDS 20 is issued as a determination under Section 23 of the Act, which states that no official record may be disposed of without the approval of the State Records Council. The Local Government General Disposal Schedule (GDS 20) applies to all records created or received by all Local Government Authorities in South Australia. GDS 20 is intended to be a comprehensive schedule covering all functions and activities of Local Government and the records created as evidence of business transactions.*

GIF

GIF: 1. Acronym for Graphics Interchange Format. A graphics file format developed by CompuServe and used for transmitting raster images on the Internet. An image may contain up to 256 colours, including a transparent colour. The size of the file depends on the number of colours actually used. The LZW compression method is used to reduce the file size still further. 2. A graphic stored as a file in the GIF format.

hard disk capacity

Hard Disk Capacity: *The amount of memory available on a PC fixed media storage device, usually measured in Giga (1,000,000,000) bytes (Gb) of memory.*

HTML

HTML: *Hypertext Markup Language. A set of tags used to mark the structural elements of text files. HTML files include tags that create hyperlinks to other documents on the Internet.*

HTTP

HTTP: *Hypertext Transfer Protocol. The communications protocol on which the Web is based. HTTP sets rules for how information is passed between the server and the browser software.*

HTTPS

HTTPS: *Hypertext Transfer Protocol Secure. A variation of HTTP that provides for encryption and transmission through a secure port. HTTPS was devised by Netscape and allows HTTP to run over a security mechanism known as SSL (Secure Sockets Layer).*

icon

Icon: *A picture or symbol that represents an object, task, command, or choice users can select by pointing and clicking with a mouse.*

IIS

IIS: *Internet Information Server. Microsoft's brand of Web server software, utilizing HTTP (Hypertext Transfer Protocol) to deliver World Wide Web documents. It incorporates various functions for security, allows for CGI programs, and also provides for Gopher and FTP services.*

index

Index: *A list of keywords the user may view to find topics within a Help system.*

ISO

ISO: *Short for International Organization for Standardization (often incorrectly identified as an acronym for International Standards Organization), an international association of 130 countries, each of which is represented by its leading standard-setting organization—for example, ANSI (American National Standards Institute) for the United States. The ISO works to establish global standards for communications and information exchange. Primary among its accomplishments is the widely accepted ISO/OSI reference model, which defines standards for the interaction of computers connected by communications networks. ISO is not an acronym; rather, it is derived from the Greek word isos, which means "equal" and is the root of the prefix "iso-."*

JPEG

JPEG or JPG 1. *Acronym for Joint Photographic Experts Group. An ISO/ITU standard for storing images in compressed form using a discrete cosine transform. JPEG trades off compression against loss; it can achieve a compression ratio of 100:1 with*

significant loss and possibly 20:1 with little noticeable loss. 2. A graphic stored as a file in the JPEG format.

JPG

JPEG or JPG 1. Acronym for Joint Photographic Experts Group. An ISO/ITU standard for storing images in compressed form using a discrete cosine transform. JPEG trades off compression against loss; it can achieve a compression ratio of 100:1 with significant loss and possibly 20:1 with little noticeable loss. 2. A graphic stored as a file in the JPEG format.

letter

Letter: (Document) A letter is written correspondence created by another person rather than something that you have made and they have filled out.

LGE

LGE: LGS Enterprise

LGS

LGS: Local Government Systems Incorporated

link

Link: A link is a connection between a records management entry and a file stored on your computer

link browser

Link Browser: A tool for moving between, adding and editing links

LZW Compression

LZW compression: A compression algorithm named after Abraham Lempel and Jakob Ziv (creators of Lempel Ziv compression) and LZW designer Terry Welch that makes use of repeating strings of data in its compression of character streams into code streams. It is also the basis of GIF compression. See also GIF, Lempel Ziv compression.

memo

Memo: (Document) A memo is correspondence, normally informal, and internal to your organisation

memory

Memory: The part of a computer that stores information or instructions. Memory can be RAM (Random Access Memory) or ROM (Read Only Memory), and is usually measured in Kilobytes (thousand) or Megabytes (million) bytes of memory.

newsgroup

Newsgroup: A collection of messages posted by individuals to a news server (a computer maintained by a company, group, or individual). Newsgroups exist on practically every subject. Messages can be posted and read by anyone who has access to that group.

page

Page: An individual topic within a Help system.

pane

Pane: A frame used to display program components.

parameter

Parameter: In programming, a value that is given to a variable, either at the beginning of an operation or before an expression is evaluated by a program. Until the operation is completed, a parameter is effectively treated as a constant value by the program. A parameter can be text, a number, or an argument name assigned to a value that is passed from one routine to another. Parameters are used as a means of customizing program operation.

parameters

Parameter: In programming, a value that is given to a variable, either at the beginning of an operation or before an expression is evaluated by a program. Until the operation is completed, a parameter is effectively treated as a constant value by the program. A

parameter can be text, a number, or an argument name assigned to a value that is passed from one routine to another. Parameters are used as a means of customizing program operation.

PDF

PDF: The file extension that identifies documents encoded in the Portable Document Format developed by Adobe Systems. To display or print a .pdf file, the user should obtain the freeware Adobe Acrobat Reader.

photograph

Photograph: (Document) A photograph is an image captured by a camera or similar device

post

Post: (Delivery Method) When the document is delivered by normal post

record

Record: A record is the piece of correspondence, such as a letter; email; fax; etc.; that the records management program tracks

records

Record: A record is the piece of correspondence, such as a letter; email; fax; etc.; that the records management program tracks

records browser

Records Browser: A tool for moving between records, adding, and editing records

re-file

Re-file: The process of returning a file to the filing system.

re-filed

Re-file: The process of returning a file to the filing system.

registered post

Registered Post: (Delivery Method) When the document is delivered by registered post

report

Report: The presentation of information about a given topic, typically in printed form. Reports prepared with computers and appropriate software can include text, graphics, and charts. Database programs can include special software for creating report forms and generating reports. Desktop publishing software and laser printers or typesetting equipment can be used to produce publication-quality output.

reports

Report: The presentation of information about a given topic, typically in printed form. Reports prepared with computers and appropriate software can include text, graphics, and charts. Database programs can include special software for creating report forms and generating reports. Desktop publishing software and laser printers or typesetting equipment can be used to produce publication-quality output.

resubmit

Resubmit: The signal process that a file will be returned at a future date for re-filing.

resubmitted

Resubmit: The signal process that a file will be returned at a future date for re-filing.

series

Series: A series is a group of related records within a file.

SGML

SGML: Acronym for Standard Generalized Markup Language. An information management standard adopted by the International Organization for Standardization (ISO) in 1986 as a means of providing platform- and application-independent documents that retain formatting, indexing, and linked information. SGML provides a grammar like mechanism for users to define the structure of their documents and the tags they will use to denote the structure in individual documents. See also ISO.

shortcut

Shortcut: (Operating System). In Windows 9x, Windows XP, Windows NT 4, and Windows 2000, an icon on the desktop that a user can double-click to immediately access a program, a text or data file, or a Web page.

SMTP

SMTP: Simple Mail Transfer Protocol. A TCP/IP protocol for sending messages from one computer to another on a network. This protocol is used on the Internet to route e-mail.

SSIS

SSIS: SQL Server Integration Services. More correctly Microsoft SQL Server Integration Services.

SSL

SSL: SSL n. Acronym for Secure Sockets Layer. A protocol developed by Netscape Communications Corporation for ensuring security and privacy in Internet communications. SSL supports authentication of client, server, or both, as well as encryption during a communications session. While primary purpose of SSL is to enable secure electronic financial transactions on the World Wide Web, it is designed to work with other Internet services as well. This technology, which uses public key encryption, is incorporated into the Netscape Navigator Web browser and Netscape's commerce servers.

State Thesaurus

State Thesaurus: The recommended classification of files. Not mandated.

strong password

Strong Password: A password containing upper and lowercase letters, numerals, and punctuation characters. It should not be a dictionary word, nor a word where numbers have replaced letters e.g. M8 instead of "mate". Normally 8 characters or longer.

tab

TAB: (Windows Control) tabs are a form of control where there are several screens arranged on top of one another with just the tabs of the underneath screens showing, similar to an index file

tabs

TAB: (Windows Control) tabs are a form of control where there are several screens arranged on top of one another with just the tabs of the underneath screens showing, similar to an index file

TCP

TCP: Transmission Control Protocol. The protocol within TCP/IP that governs the break-up of data messages into packets to be sent via IP (Internet Protocol), and the reassembly and verification of the complete messages from packets received by IP. A connection-oriented, reliable protocol (reliable in the sense of ensuring error-free delivery), TCP corresponds to the transport layer in the ISO/OSI reference model.

text box

Text Box: (Windows Control) In a dialog box or HTML form, a box in which the user may enter text.

TFS

TFS: Team Foundation Server. More correctly Microsoft Team Foundation Server, a collaboration tool used by software development teams.

TIFF

TIFF or TIF: Acronym for Tagged Image File Format or Tag Image File Format. A standard file format commonly used for scanning, storage, and interchange of gray-scale graphic images. TIFF may be the only format available for older programs (such as older versions of MacPaint), but most modern programs are able to save images in a variety of other formats, such as GIF or JPEG.

tour

Tour: Screen shots and information about a product displayed in sequential order. Designed for a user who wants to walk through a feature or a program.

UDP

UDP: User Datagram Protocol. The connectionless protocol within TCP/IP that corresponds to the transport layer in the ISO/OSI reference model. UDP converts data messages generated by an application into packets to be sent via IP, but it is “unreliable” because it does not establish a path between sender and receiver before transmitting and does not verify that messages have been delivered correctly. UDP is more efficient than TCP, so it is used for various purposes, including SNMP; the reliability depends on the application that generates the message.

URL

*URL: Uniform Resource Locator. An Internet address, as well as a standard method of naming files on the Web. A URL begins with a protocol name (such as http), followed by a colon and two forward slashes(/). Next comes the name of the internet server that the file is stored on, followed by directories that hold the file, separated by forward slashes(/). The filename comes last, as shown in the following example:
http://www.mycompany.com/whatsnew.htm*

W3C

W3C: Abbreviation for the World Wide Web Consortium, a standards body based in the United States, Europe, and Japan. The W3C is dedicated (in part) to encouraging the development of open Web standards, such as the HTML and XML document markup languages, to promote interoperability and assist the Web in achieving its potential.

web browser

Web Browser: Commonly called a browser. A software application for displaying HTML pages on the World Wide Web. Common browser applications include Microsoft Internet Explorer and Netscape Navigator.

wildcard

*Wildcard: A wildcard is a symbol that can replace any character for example cab, cad, cam, can, cap, car, and cat are all matches with ca**

wildcards

*Wildcard: A wildcard is a symbol that can replace any character for example cab, cad, cam, can, cap, car, and cat are all matches with ca**

WSDL

WSDL: Acronym for Web Services Description Language. An XML format developed to allow for better interoperability among Web services and development tools. WSDL describes network services as collections of communication endpoints capable of exchanging messages and is extensible to allow description of endpoints and their messages regardless of what message formats or network protocols are used to communicate.

WWW

WWW: World Wide Web. The graphical Internet hypertext service that uses the HTTP protocol to retrieve Web pages and other resources from Web servers.

WYSIWYG

WYSIWYG: What You See Is What You Get (pronounced Wizzy Wig). A development option that allows you to view items in the editor as they will display for end-users.

XML

XML: Acronym for eXtensible Markup Language, a condensed form of SGML (Standard Generalized Markup Language). XML lets Web developers and designers create customized tags that offer greater flexibility in organizing and presenting information than is possible with the older HTML document coding system. XML is defined as a language standard published by the W3C and supported by the industry.

INDEX

- A**
- activities tabs
 - file, 5
 - activity
 - file, 4
 - add
 - contact address, 10
 - add record, 7
 - records browser, 8
 - allocate record to file, 7
 - attachments tab, 10
 - author
 - search, 9
 - author tab, 9
- B**
- button
 - add contact address, 10
 - cancel changes, 11
 - edit address, 10
 - edit contact, 10
 - report options, 14
 - save, 11
 - search, 9
- C**
- cancel changes button, 11
 - contact
 - add address, 10
 - edit address, 10
 - contact details
 - edit, 10
- D**
- details tab, 9
- E**
- edit
 - contact address, 10
 - contact details, 10
 - edit address button, 10
 - edit contact button, 10
 - entity
 - add, 12
 - edit, 12
 - similar enties control, 13
- F**
- file, 3
 - activities tab, 5
 - activity, 4
 - add, 3
 - edit, 3
 - function tabs, 5
 - name, 3
 - note tabs, 5
 - number, 4
 - other details, 4
 - subject, 4
 - subject tab, 5
 - functions tab
 - files, 5
- G**
- glossary, 21
- H**
- how to
 - add entity, 12
 - add record, 7
 - run reports, 14
 - search, 16
- N**
- name
 - file, 3
 - notes tab
 - files, 5
 - number
 - file, 4
- O**
- other details
 - file, 4
- P**
- parameters
 - search, 16
- R**
- received date, 8

record
 allocate to file, 7
 details tab, 9
 subject, 8
record arrival method, 8
record date, 8
record flow direction, 8
record type choices, 8
records browser, 8
report options button, 14
report parameters, 15
reports, 14

S

save button, 11
search, 16
 author, 9

 button, 9
 parameters, 16
 types, 16
series number, 8
similar entries control, 13
subject, 8
 file, 4
subjects tab
 files, 5

T

tab
 attachments, 10
 author, 9
 details, 9
types
 search, 16

Course Critique

Name: _____ (optional)
Session: _____
Presenter: _____

Agree ->Disagree

Content

- The session was well organised
- The balance between theory and practical was right
- The session contained the right amount and was well paced
- The session content is relevant to my needs
- I didn't understand the material presented during the session

Delivery & Presentation

- The activities helped my learning
- The presenter was enthusiastic about the session
- The presenter inspired confidence in his knowledge about the session topic
- I would recommend the presenter to other learners

Materials

- The handouts were appropriate for the session

--	--	--	--	--

Learner Needs

- This session meets my needs
- The presenter responded well to the participant's needs
- I was provided with enough information before coming to this session
- I would recommend this session to other learners

Venue

- The venue had good lighting
- The venue had good ventilation
- The venue had comfortable furniture
- There were no external distractions.

General

The things I liked the most about this session:

The things I liked least about the session:

Other:
