

## **Filetrak Training Program**

### **Operator Training**

#### **General Overview of System**

Program Functionality

Menu System – Filetrak System Programs

Panel Control Buttons and Icons On-Line Help

Utilities Menu

Change User Password

#### **Files**

File Types

File Groups *Insert/Change/Delete/Enquiries/Reports*

File/Multiple Volumes – Insert/Change

Label Printing

Enquiries

Reports

Inactive & Destruct Review Reports

#### **Documents**

Introduction and Overview on Document Program use

*Groups, Hard/Soft, Loose Documents, Attached Documents, Correspondence, Management, Copies, Distribution Lists*

Document Types

Document Groups

Insert / Change Documents

Attach Documents to Files

Enquiries Documents

Enquiries Files to view Documents

Reports

## **Storage Boxes**

Storage Box Groups

Storage Boxes – Inset Single & Multiple Boxes

Label Printing

Packing/Unpacking Storage Boxes

Print Storage Box Report

Storage Box Enquiries

## **Tracking**

Files / Documents / Boxes – Between Stations

Scanner Operation

Distribution Lists (where applicable)

Tracking Enquiries

Tracking Reports

## **KWOK Sub-Menu** (Optional depending on Site)

Synonyms

Supervisor Enquiry

### **Files**

- Exclusions
- Enquiries
- Reports

### **Documents**

- Document Word Enquiry

## **Filetrak Training Program**

### **System Supervisor Training**

#### **General Overview of Filetrak System**

Filetrak Security Program Functionality

Menu System – Filetrak Security

Panel Control Buttons

On-Line Help

#### **Utilities Menu**

Log on / change password

#### **Defaults Menu**

Master System Defaults

Field Prompt Names – File Groups / Files / Tracking

File Security Level Definitions

Document System Defaults / Field Prompts

Special passwords

#### **Maintenance Menu and Reports Menu**

User Groups – Insert & Report

User / Stations – Insert & Report

#### **System Supervisor Functions**

Active Users / Maintenance Button

Bulk Changes / Deletions Menu

Reassign User Group / Reassign Residence

File Type Changes / Process Changes / Delete

Document Type Changes / Process Changes

## **Reindex Data Files & KWOK Rebuild**

## **Codaprint Templates**

## **Page Label Formats**

## **Reports Menu**

- Security Levels
- System Status
- Database Additions