

# HP RM 8 Record Types Expert

Streamline record creation through intelligent design

## OVERVIEW

Record type design drives quality information management and user adoption. RM8 provides the opportunity to incorporate a range of automated features and intelligent behaviour in record types, and streamline record creation for digital recordkeeping.



### Assessing Record Type Needs

- Record Type relationships with other Items
- Assessing business unit requirements
- Decisions for Record Type creation
- Record Type design
- Record Type behaviours

### Advanced Record Type Creation

- General tab
- Numbering tab
- Menu tab
- Defaults tab
- Additional Fields tab
- Forms tab

### Security and Access

- Access controls vs. default record access
- Managing access
- Setting default record access
- Setting Copy Style options

### Developing Complex Structures

- Automatic Sub Folders
- Specialist Record Types
- Client Record Type behaviour and structure
- Matter Record Type behaviour and structure
- Client & Matter records – the user experience
- Developing hierarchies

### DURATION

1 day

→ [Click Here for Scheduled Dates](#)

### DELIVERY MODES

- ✓ Scheduled classes
- ✓ Onsite classes
- ✓ Webinar
- ✓ Presentation

### PRE-REQUISITES

TRIM/RM8 Administration

### CORE COMPETENCIES

- ✓ Planning
- ✓ Business Analysis
- ✓ Advanced Configuration

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for more information