

SynergySoft Records Admin

Overview

This course is designed for Records Officers, Managers and users who handle mail and will demonstrate an intermediate overview of all aspects of the SynergySoft Central Records module.

Those wishing to take advantage of a refresher would also benefit from attending this course.

This course is offered as an Online (live streaming) workshop only.

Who You Are

Attendees will need to have:

- Knowledge of SynergySoft
- Fundamental knowledge of computers
- Fundamental knowledge of Microsoft Word

Learning Outcomes

1. Records
 - a. What is the Record Management System?
 - b. Benefits of Using a Record Management System
 - c. What is a Record?
 - d. What is Metadata?
2. Records
 - a. Understanding SynergySoft
 - i. Login, Open Programs and Use Programs
3. Central Records Design
4. Records Registration



- a. Using Records
 - b. Best Practices/Necessary Procedures
 - c. Understanding the Codes of Records Registration
 - d. Searching for Records
 - e. Record Status and Maintaining Records Authenticity
- 5. Central Records**
- a. Record Management
 - b. Using Records Registration
 - c. Using Mail Merge Templates
- 6. Files**
- a. Creating Files
 - b. Create a New Volume
 - c. Using a Thesaurus
 - d. Basic Ideals of Retention & Disposal
 - e. Setup Security Files
- 7. Thesaurus**
- a. Overview
 - b. Maintaining a Thesaurus
- 8. Retention & Disposal**
- a. What is Retention & Disposal
 - b. Functions of Retention & Disposal
 - c. Maintaining Retention & Disposal Rules
- 9. Names & Addresses**
- a. What is Name and Addresses
 - b. Entering Individuals & Companies
 - c. Maintaining Names & Address Details
- 10. Advanced Features**
- a. Global Change
 - b. Bulk Attachments
 - c. Settings
- 11. Office Integration**



- a. Register Emails
- b. Email Microsoft Word/Microsoft Excel documents

Please note this course is a thorough overview of the SynergySoft Records Management module, for those who require a higher-level overview only there is a User level course available:

- SynergySoft Records User