



SynergySoft Central Records

SynergySoft Central Records is the only Electronic Document and Records Management System developed specifically for Local Government. It provides a central repository for all Council information.

Central Records provides a means of registering and classifying all types of electronic and paper-based records and information. Most importantly, it is integrated within the complete SynergySoft suite to enable records and their associated electronic attachments to be viewed through a single portal to all information.

Having selected an entity through a SynergySoft enquiry, the user can easily view any records or attached images associated with that entity without having to perform additional enquiries through the Central Records System. Examples of entities are a property, asset, infringement, customer request, HR record, debtor, creditor, dog, application etc.

Scanned images and "electronic" documents such as word processing documents, spreadsheets, computer reports, maps, pictures and scanned images can be stored within the system and retrieved simply and quickly. It also provides a solution for the capture of e-mail from Outlook directly to the Central Records System and Council's Records Repository.

Central Records allows users within the organisation to gain instant access to information (providing they have the access

rights) on any topic, regardless of its format, its location, who created it, why or where it was created. Records can be retrieved using a vast selection of search criteria including Record No, Routing, Record Type, File/Classification, Correspondent, Keyword/s, Action Officer, Record or Action Status, Date Received/Sent, Date Acknowledged, Action Status Date or Record Status Date etc.

The Central Records application has been designed to assist in achieving the following goals:

- Simple and efficient retrieval of records and associated images.
- User friendly Records Registration forms that allow an organisation to register details of all records received / forwarded, regardless of whether those records are hardcopy or electronic.
- Ability to monitor the location of physical file volumes and loose physical attachments to records either manually or via implementation of barcode technology
- Functionality to provide up to date details of outstanding tasks to individual officers, and an organisation-wide view of outstanding tasks to records staff via system enquiry and user reports.
- Sophisticated matrix of security over an organisation's records and electronic records repository.



- Ability to classify records using a thesaurus (SynergySoft supports the State Records Office of WA's Keywords for Councils Thesaurus, or any other desired thesauri).
- Control over the retention and disposal of records in accordance with the General Disposal Authority for Local Government in WA and General Disposal Schedule version 20 in South Australia.
- Seamless integration with all other SynergySoft Systems which allows organisations to easily maintain and view relationships between any entity and their associated records / images.

Records are registered and identified by their record type. Record types are User definable and allow organisations to specify default controls for a record of that type, including numbering format, response times, and default status. Examples of typical record types are letters, email, circulars, agenda, minutes, brochures, customer requests, building applications and planning applications.

Typically incoming correspondence is scanned, and then registered in the Central Records system. Councils are able to specify the type of images to be created for incoming records and the image format will be retained when the records are transferred to the records repository.

Outgoing correspondence is generated either within the source application or in the Central Records system via use of organisation and departmental templates. Outgoing records created in Word or Excel, either from the source or via the templates feature, maintain

their original format when they are transferred to the records repository.

SynergySoft Office Integration is also available to provide users a means of registering records into the SynergySoft Central Records system, without users being logged into SynergySoft. SynergySoft Office Integration is incorporated within Microsoft Outlook, Word and Excel to allow users to choose what electronic records they wish to register. This greatly improves the likelihood that records are recorded and simply not forgotten.

The records repository is a secure network location that is specified by the organisation during implementation of the Central Records System. Access to records at this location is tightly controlled via SynergySoft Security and Access Privileges employed by an organisation's IT Administrator.

Action responsibility for records can be allocated to an individual officer, multiple officers, or department and action dates may be automatically applied to specific record types to ensure that replies to correspondence, or actions, are not overlooked.

Records that are generated from other SynergySoft applications (like Building, Planning, Agenda and Minutes, and Customer Requests) are automatically registered in the Central Records system.

SynergySoft Central Records also provides facilities for the full maintenance and control of electronic and physical files/volumes, including thesaurus classifications using Keyword/Activity/Subject, default retention and disposal terms, memos, loan history and locations of files.



Features of the SynergySoft Central Records System include:

- Simple, user friendly and consistent data entry forms.
- Comprehensive searching functionality for records and the ability to officers to save and re-use standard searches.
- Seamless interface with other SynergySoft Systems for viewing of related records and attachments.
- Ability to register and maintain details of manual and electronic records.
- FTP Protocol to secure all documents / images in the Records Repository.
- Sophisticated internal security matrix to control access to Records data and associated documents / images.
- Support for Assessment Based Filing Systems.
- Support for thesaurus classification of files and volumes using Keywords for Councils or a user-defined thesaurus.
- Retention and Disposal Schedule maintenance in accordance with State requirements.
- Template creation and maintenance functions.
- Creation and management of Archive Boxes and Locations.
- Global Change functionality for Records Administrators.
- Functionality to generate and register bulk mail merge records from other SynergySoft systems following a search in that system, eg. All properties within a suburb.
- Ability to create relationships with all other accounts / applications in other SynergySoft systems.
- Tight integration with the Microsoft Office application.
- Support for the use of barcode technology for the management of file volumes and records locations.
- Location structure presented in a windows explorer style format for simple maintenance and navigation by users.
- Full audit trail functionality including the recording and reporting of all view, add, modify and delete access to records.
- Comprehensive reporting functionality through the use of SynergySoft Report Manager and output to Word, Excel, HTML, XML, Access and Crystal Reports.
- Capture and registration of records created directly from Word, Excel and Outlook.
- Review and enhance version control of records.
- Ability to identify and maintain details of alternative renditions of a record
- Management of the status on Vital Records.

For further information email Sales@itvision.com.au or contact:

Martin Bull or Angelo Nardi
IT Vision Perth Office
Tel: 08 9315 7000

Sebastian Sapio
IT Vision Adelaide Office
Tel: 08 8354 3366