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Course/Workshop Name

Level

Presentation Style

COURSE OUTLINE

SynergySoft Central Records

Administration

Hands on training

Who should Attend

This course is designed for Records Officers, their Managers and any officer who handles mail. This course will demonstrate all aspects of Records Administration

Prerequisites

Attendees will need to have:

- Knowledge of SynergySoft
- Fundamental knowledge of computers
- Fundamental knowledge of MS word

Course Content

Records

- What is Record Management System
- Benefits of using a Record Management System
- What is a Record?
- What is Metadata?

SynergySoft

Understanding SynergySoft:

- Be able to login, open programs and use programs

Central Records design

Records Registration

- How to use it
- What procedures need exist
- Understanding the codes of Records Registration
- Searching for Records
- Record Status and maintaining Records Authenticity

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Files

- How to create files
- How to create a new volume
- How to use a thesaurus
- How to apply a Retention & Disposal
- How to setup security files

Thesauruses

- What is a thesaurus
- How to maintain a thesaurus

Retention & Disposal

- What is Retention & Disposal
- How does it work
- How to maintain Retention & Disposal rules

Loans and Returns

Boxes

Names & Addresses

- What is the Name and Address program
- How to enter individuals and companies
- How to maintain Names & Address details

Advanced Features

- Global Change
- Bulk Attachments
- Settings

Reports

- Overdue Records Report
- Monitoring Outstanding Records



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