readytech

SynergySoft Records User

Overview

This course will demonstrate the basic aspects of the SynergySoft Central Records module and is designed for users of SynergySoft Central Records who want to view or register record items (mail, documents, email etc).

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. Searching for Records

    b. Register Records

    c. Record Management

    d. Using Records Registration

    e. Using Mail Merge Templates

6. **Files**

    a. Searching for Files

    b. Basic Ideals of Retention & Disposal

7. **Retention & Disposal**

    a. What is Retention & Disposal

    b. Functions of Retention & Disposal

8. **Names & Addresses**

    a. What is Name and Addresses

9. **Office Integration**

    a. Register Emails

    b. Email Microsoft Word/Microsoft Excel documents

Please note this course will *not* cover all aspects of SynergySoft Records Management system and an intermediate course is available for those who require a more thorough understanding.

- SynergySoft Records Admin