

FEATURES LIST

Versatile Enterprise is Zasio's premier records and document management system. Enterprise is a comprehensive solution that enables you to manage information unlike any other system available today. From a records management perspective, Versatile Enterprise can manage the complete life cycle of physical and electronic records.

▣ General Capabilities

Manages physical records

Enables records retention schedule development

Supports full-text searching

Allows sorting, printing, and exporting of customized reports

Manages images as records*

Allows screen customizations, including user-defined fields and field renaming

Supports color label design*

Supports tethered and portable barcoding*

Manages record center in a graphical display

Contains a comprehensive security system

Manages record destructions

Remote Web access*

Manages electronic records*

Supports multiple level record structures as the foundation of file classification system

Includes a ChargeBack system to bill departments for services performed

Allows saving of screen customizations to user profiles

Allows set up of event handlers for automatic notifications*

Includes audit trail to track changes made to data

Allows saving of search filters, reports, and views to shared strategies

*Additional software or hardware required

▣ **Manages Physical Records**

- Tracks file folders, boxes, and documents
- Create unlimited record labels with barcodes
- Index your records with standard fields as well as unlimited user-defined fields
- Allows reorganization of department structure
- Move records to another department with global change
- Create custom lists
- Create custom labels with barcodes
- Create charts and graphs of checkout requests
- Checkout Manager performs records request handling
- Allows end-user file and box requests

▣ **Retention Scheduling**

- Enables records retention schedule development
- Create record series at global, company, or department level
- Contains configurable record classification codes
- Allows dynamic retention calculation methods
- Tracks active and inactive record phases
- Calculate retention based on time period or event
- Retention dates continually calculated by retention processor
- Manages retention holds

▣ **Full-Text Searching**

- Supports keyword, full-text, phrase, Boolean (and, or, not, like), wild card (leading, embedded, and trailing), and proximity searches
- Searches multiple fields, including user-defined fields
- Sorts, rearranges and prints retrieved records
- Exports search results to Microsoft® Excel®

▣ **Reports**

- Includes an integrated reporting system
- Creates standard and unlimited user-defined reports
- Allows for online reporting of checkout history and pending activities
- Creates statistical reports, using graphs and charts
- Supports print queuing, previewing, and selective page printing
- Allows report e-mailing and exporting to file
- Open database architecture—Oracle or MSSQL—allows third-party report writing applications

▣ **Imaging***

- Versatile Imaging** lets you manage images as records.
- Scan directly into the Versatile Enterprise application, where they can be organized by content, annotated, and attached to files

▣ **Customizable Fields**

- Contains standard and user-defined fields and tables
- Minimizes data entry with efficient screen design
- Allows renaming of headings, captions, and hints

▣ **Color-Coded Labels***

- Versatile Color Label Designer** lets you create custom color-coded label designs for files

▣ **Barcoding***

- Supports tethered and portable barcoding
- Scan barcodes for checkout and retrieval
- Prints barcodes on reports and labels

▣ **Record Center**

- Provides 2-dimensional graphical display of your records centers/storage rooms
- Allocate space for aisles, bays, and shelves based on your storage room's physical properties
- Scan or assign aisle, bay or shelf in your record center
- Prints shelf labels and space management reports
- Tracks history of positions on shelves
- Select from multiple record center display scenarios
- Storage location can be assigned in advance or when boxes are placed on the shelves
- Allows graphing of used space

▣ **Security**

- Allows administrators to manage access to software functionality and data
- Applies security to users based on security groups
- Controls access to data by company, department, record series, storage room, and image type
- Allows for password encryption
- Allows for locking out users after unsuccessful login attempts
- Supports LDAP integration for single sign-on

*Additional software or hardware required

▣ Destructions

- Provides an organized approach to destroying records
- Tracks containers in transit as well as in storage
- Organize dispositions into batches, by department, record series, retention policy, etc.
- Allows scanning of items into destruction batches
- Allows transfer of custody to third parties

▣ Remote Web*

- Search, request, view, and submit records with the **Versatile Web**

▣ Manages Electronic Records*

- Manage ALL types of electronic records, including e-mail
- Drag, copy, paste or save directly into the **Versatile ERMS** repository from any Windows® location or application
- Store e-mail manually, or use rules to silently retain and classify vital messages based on content, sender, recipient, importance, attachments, and more

▣ Complex Record Structures

- Define multiple level record structures as the foundation of your file classification system
- Reduce file classification errors with standardized structures
- Group related record titles with identical retention policy, or by subject matter
- Create global, company-wide, or departmental record structures

▣ Chargeback System

- Allows administrators to set up user-defined accounts and cost schedules
- Automatically charges departments for transactions, such as file checkout, box checkout, record destruction, and record storage
- Allows invoice generation and export to other systems
- Allows charging of different amounts based on box type or media type
- Records charges in the account journal

▣ User Profiles

- Controls the look and properties of screens
- Allows administrators to hide or rename fields, set default values, make fields “read only” or editable, or require fields to be populated
- Provides for an additional level of security by assigning profiles to users

▣ Automatic Notifications*

- Versatile Notification System** allows you to send automatic e-mails with customized text and recipient lists for events or processes occurring in Versatile Enterprise.

▣ Audit Control

- Tracks changes made to data transparently
- Records any change that was made, who made it, and when it occurred
- Allows restoring records to their original state after a change was made
- Displays the audit trail for a single item or for all items in the database
- Allows printing of audit trail reports
- Provides for audit control when using commercial records centers

▣ Strategies and Views

- Allows users to save keywords and search filters, column selections, and reports to strategies and views
- Store strategies on network drives; e-mail to coworkers; run at any time to update search results or reports with current data
- Dynamic date ranges automatically adjust according to the date when the search is executed or the report is run
- Share search strategies and reports with all users in a company or department
- Execute, modify, and save a strategy in one area of the software and then use it in another: Files, Boxes, Documents, and Global Search
- Save strategies as independent objects, capable of being run outside of Versatile as live, dynamic queries

*Additional software or hardware required

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ZASIO
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