

FEATURES LIST

Versatile Professional is a powerful records management tool designed to simplify the process of collecting and maintaining physical records information. Professional is the mid-range solution in Zasio's suite of powerful, intuitive records management software products. The following list includes some of the many features in Versatile Professional.

▣ 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 field customizations, including user-defined fields and field renaming

Contains built-in color label designer

Supports tethered and portable barcoding*

Manages record center in a graphical display

Contains a comprehensive security system

Manages record destructions

Remote Web access*

*Additional software or hardware required

▣ **Manages Physical Records**

- Tracks file folders and boxes
- Index your records with standard fields as well as unlimited user-defined fields
- Move records to another department with global change
- Checkout Manager performs records request handling

▣ **Retention Scheduling**

- Create and maintain record retention schedules
- Schedule records for physical transfer and destruction
- Calculate retention based on time period or event
- Retention dates calculated by retention processor

▣ **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 report e-mailing and exporting to file
- Reports on inventory, circulation activity, and destructions

▣ **Imaging**

- Contains a built-in imaging system
- Attach electronic files, such as PDFs, Word documents, or images to a file or box
- Scan images, or load from a network or PC
- Display and work with images from built-in imaging viewer

▣ **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**

- Contains a built-in color label design system
- Easy-to-use label design in a WYSIWYG screen
- Prints color-coded shapes, text, and barcodes based on data from your Versatile database
- Prints static shapes, text, barcodes, lines, and graphics on labels
- Define your own color mapping based on letters, numbers, months, years, etc.
- Preview labels before printing
- Import existing TabQuik® label formats, or print directly from Versatile through the TabQuik program

▣ **Barcoding***

- Supports tethered and portable barcoding
- Scan barcodes for easy 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

*Additional software or hardware required

▣ Security

Allows administrators to grant or restrict access to software functionality and data

Applies security to users based on security groups

▣ Destructions

Provides an organized approach to destroying records

Organize destructions into batches, by department, record series, retention policy, etc.

Scan items into destruction batches

Provides for authorization tracking

▣ Remote Web*

Search, request, and view your records with the **Versatile Web**

*Additional software or hardware required

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