

FEATURES LIST

Versatile Retention™ is a complete retention schedule management and research tool that will keep your schedule up-to-date, under control, and legally compliant. With the available Web interface, your schedule will be accessible to your entire organization.

Retention is the first retention software designed by records managers for records managers. It's so easy to use, anyone—attorneys, legal assistants, librarians, or other information specialists—can use it effectively.

Retention's legal research database contains more than 25,000 U.S. federal and state laws and regulations with official identifiers, full citation text, and specific retention requirements. Our research team is adding to the repository continually, and the new citations are delivered right to your system through the internet. You can even add your own citations to fill in local or industry-specific requirements. An intuitive search engine allows you to search the citations applicable to your business and link them to schedule titles to show legal backing for retention rules.

Retention gives you control over updates to your retention schedule with complete change management workflow. Change authorizers can be configured by job title or department, and authorizers are automatically notified of pending change requests. Authorizations can be applied through the Web, and every change is fully audited.

▣ **General Capabilities**

Perform legal research in the Retention database of over 30,000 requirements

Search using Boolean, phrase, wildcard, proximity search, and complex combinations of search criteria

Download new citations with live data update feature

Build your records retention schedule and link citations to support the stated retention periods

Design and print reports with the integrated report designer

Attach and e-mail reports as PDFs to coworkers right from within the application

Apply built-in roles to users to define what they can do and see within the application

Apply security to users

Intuitive and easy to use with built-in tutorials

Create one master schedule and easily designate which countries are covered by each schedule title

Add country-specific exceptions to global retention rules

Displays international character sets

Web-accessible retention schedules and citations*

▣ Research

Search for relevant citations by jurisdiction, business activity, agency, regulated party, keyword, CFR number, and more

View the number of citations that meet your criteria—narrow down the criteria before you search

View retrieved citations on screen

Add your own citations to fill in local or industry-specific requirements

Sort and print retrieved citations

▣ Schedules

Create global, company, or departmental retention schedules

Manage updates to your retention schedule with complete change management workflow

Attach citations to schedules as support for the retention period

Search schedule titles by company, department, sub-department, keyword, user-defined fields, and more

View citations associated with schedule titles by simply selecting the title

Print retention schedule lists and reports

Configure change authorizers by job title or department

Automatically notify authorizers of pending change requests

Apply authorizations through the Web*

Fully audited change management

▣ Interviews

Record and organize interviews with key persons in your organization

Keep track of record locations, special retention requirements, and other useful notes

Build your retention schedule directly from interviews, eliminating duplicate data entry

▣ Web Access*

Search and view the corporate records retention schedule

View and authorize change requests for schedules

View messages sent in conjunction with change requests

Research regulatory requirements to retain records

View interview data

*Additional software or hardware required

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ZASIO
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