

ZASIO

VERSATILE
ENTERPRISELE™

Features List

Versatile Enterprise LE™ is Zasio's premier records and document management system designed for law firms. Enterprise LE is a comprehensive solution that enables you to manage information unlike any other system available today. From a records management perspective, Versatile Enterprise LE can meet any RM business process challenge: clients and sub-clients, matters, active document and file maintenance, inactive files and boxes, electronic documents, email, circulation, retention schedules, holds, and destructions.

General Capabilities

- Physical Records Management
- Manages Clients and Matters
- Robust Full-Text Searching
- Tracks Circulation of Records
- Performs Retention Scheduling
- Integrated Reporting System
- Space Management
- Circulation (Check Ins/Check Outs) Management
- Comprehensive Security
- Strategies and Views
- Destruction Management
- ChargeBack System
- Maintains Audit Control
- Customizable Fields
- Complex Record Structures
- User Profiles for Personalization
- Automatic Notifications*
- Imaging and Electronic Attachments*
- Web Search, Request, and View*
- Electronic Records Management*
- Color Label Design System*
- Integrated Barcode Technology*

Physical Records Management

- Track file folders, boxes, and documents
- Create unlimited record labels with barcodes
- Index your records with standard fields as well as unlimited user-defined fields
- Reorganize your department structure
- Move records 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

Full-text Searching

- Perform keyword, full-text, phrase, Boolean (and, or, not, like), wild card (leading, embedded, and trailing), and proximity searches
- Search multiple fields, including user-defined fields
- Sort, rearrange, and print retrieved records
- Export search results to Microsoft® Excel®

Integrated Reporting System

- Create standard and unlimited user-defined reports
- Report on checkout history and pending activities
- Create statistical reports, graphs, and charts
- Print to queue, preview reports, and print selective pages
- Email reports and export to file
- Open database architecture—Oracle or MSSQL—allows third-party report writing applications

Retention Scheduling

- Develop records retention schedules
- Create record series at global, company, or department level
- Configure your own record classification codes
- Apply dynamic retention calculation methods
- Track active and inactive record phases
- Calculate retention based on time period or event
- Manage retention holds
- Retention dates continually calculated by retention processor

* Requires additional software or hardware

Manages Clients and Matters

- Add any number of clients and sub-clients
- Add any number of matters
- Link users that relate to the clients or matters as related parties
- Link client and matter to each box, file, or document
- Search records by client and matter
- Display client and matter information in reports and labels
- Sort and group records by client and matter for easy identification of related case information
- Build ethical walls around each client to prevent unauthorized access to client records

Space Management

- Provides two-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, and shelf in your record center
- Print shelf labels and space management reports
- Track history of positions on shelves
- Select from multiple record center display scenarios
- Assign storage locations in advance, or when boxes are placed on the shelves
- Generate graphs of used space

Circulation (Check Ins/Check Outs) Management

- Scale your check out options depending on your needs
- Send and approve check out requests
- Use the built-in wizard to guide you through the checkout process
- Send and approve requests in batches
- Generate reports and activity charts
- List and view check out activity for an item, user, or date

Comprehensive Security

- Manage access to software functionality and data
- Apply security to users based on security groups
- Control 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

Strategies and Views

- Save keywords and search filters, column selections, and reports to strategies and views
- Store strategies on network drives; email to coworkers; run at any time to update search results or reports with current data
- Assign dynamic date ranges that 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

Destruction Management

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

User Profiles

- Control the look and properties of users' screens
- Hide or rename fields, set default values, make fields "read only" or editable, and require fields to be populated
- Assign profiles to users for an additional level of security

Chargeback System

- Set up user-defined accounts and cost schedules
- Automatically charge departments for transactions, such as file checkout, box checkout, record destruction, and record storage
- Generate invoices and export to other systems
- Charge different amounts based on box type or media type
- Record charges in the account journal

Audit Control

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

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

Unlimited User-Defined Fields

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

Automatic Notifications*

- *Versatile Notification System* allows you to send automatic emails with customized text and recipient lists for events or processes occurring in any Versatile application.

Imaging and Electronic Attachments*

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

Web Search, Request and View*

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

Electronic Records Management*

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

Color Label Design System*

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

Integrated Barcode Technology*

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

* Requires additional software or hardware

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