# ZASIO

## VERSATILE
# PROFESSIONAL™

*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. The following list includes some of the many features in Versatile Professional.

### General Capabilities

- Physical Records Management
- Retention Schedules Management
- Robust Full-Text Searching
- Integrated Reporting System
- Imaging and Electronic Attachments
- Unlimited User-Defined Fields
- Color Label Design System

- Space Management
- Comprehensive Security
- Destruction Management
- Automatic Notifications
- Integrated Barcode Technology*
- Web Search, Request, and View*

### Physical Records Management

- Track file folders and boxes
- Index your records with standard fields, as well as unlimited user-defined fields
- Move records 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), wildcard (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®

### Reports

- Includes an integrated reporting system
- Create standard and unlimited user-defined reports
- Email and export reports to file
- Report on inventory, circulation activity, and destructions

### Imaging and Electronic Attachments

- 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

### 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

## Color Label Design System

- Contains a built-in color label design system
- Easy-to-use label design in a WYSIWYG screen
- Print color-coded shapes, text, and barcodes based on data from your Versatile database
- Print 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

## Space Management

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

## Comprehensive Security

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

## 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

## 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.

## Integrated Barcode Technology*

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

## Web Search, Request, and View*

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

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