

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

Strategies and Views

- Save keywords and search filters, column selections, and reports to strategies and views
- 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

Integrated RFID Technology*

- Print your own RFID labels or associate preprinted ones
- Support various types of RFID readers
- Portable readers allow for check-in, check-out, storage, vendor ID assignment, content look-up, storage room audit and lost record locator

Multiple Language options

- Allow users to capture data in any language
- Customize the application interface to display menus in various languages

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
- Customize capture options such as DPI, color level and compression

Web Search, Request and View*

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

Electronic Records Management*

- Link personal Outlook folders to ERMS for auto-saving as you organize email
- 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
- Portable readers allow for check-out, check-in, storage, content look-up, vendor ID assignment, and storage room audit.
- Print barcodes on reports and labels

ZASIO

VERSATILE ENTERPRISE™

Features List

* Requires additional software or hardware

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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. Versatile Enterprise can manage the complete life cycle of physical and electronic records.

General Capabilities

- Physical records management
- Unlimited user-defined fields
- Retention schedules management
- Full-text searching
- User profiles
- Circulation (check ins/check outs) management
- Integrated reporting system
- Space management
- Comprehensive security
- Destruction management
- Complex record structures
- ChargeBack system
- Audit control
- Strategies and views
- Multiple language interface options
- Integrated RFID technology*
- Automatic notifications*
- Web search, request, submit and view*
- Electronic records management*
- Imaging and electronic attachments*
- Color Label Design system*
- Integrated barcode technology*

Physical Records Management

- Track file folders, boxes, and documents
- Create unlimited record labels with barcodes or RFID tags
- 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
- Handle records requests with the Checkout Manager
- Allows end-user file and box requests

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
- Create unlimited Custom Lists

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

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
- Search electronic document content
- Export search results to Microsoft® Excel®

User Profiles

- Control the 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

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

Integrated Reporting System

- Includes an integrated report design tool
- 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, thumbnails and print selective pages
- Email reports and export to file
- Open database architecture—Oracle or MSSQL—allows third-party report writing applications

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

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

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

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

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