ZASIO

VERSATILE
RETENTION™

Features List

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

General Capabilities

- Provides legal research database
- Manage interview notes
- Built-in report designer
- Citations updated continually

- Powerful security features
- Foreign language data support
- Change control workflow
- Interview metadata

- Complete schedule management
- Simplified web interface for end users[1]
- Automatic notifications[2]

Research

- Database of over 50,000 domestic records retention requirements
- 13,000 Canadian acts and regulations[2]
- Search for relevant citations by jurisdiction, business activity, agency, regulated party, keyword, citation 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

Citations

- Each citation contains all of the relevant retention details to assist with compliance, including: identifiers, regulated parties, agencies, headers, full text, business activities, added/updated dates, related schedule titles, and follow-up flags.

Reports

- Use the templates provided to generate professional reports immediately, or design your own with the built-in, wizard-driven tool.

Live Updates

- Updates and additions to domestic citations are published every few weeks, and delivered right to your desktop through the internet, where you can review them before applying.

Security

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

Language

- Citations and schedules support single- and doublebyte characters, including right-to-left languages, so you can maintain the original language of a regulation.

Change Management

- Versatile Retention tracks every step of the schedule update process, including drafting, proposing, notifying, obtaining authorizations, and final approval. Every step of the process is audited and maintained for historical record. All of this happens without ever having to export or email external copies of the schedule. Designated authorizers see alerts within the application or receive email notifications* to see what has changed and provide approval or updates using the desktop or web interface.

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

Schedules

- Create global, company, or departmental retention schedules
- Attach citations to schedules as support for the retention period
- Copy citations between schedule titles
- Search schedule titles by company, department, subdepartment, keyword, user-defined fields, and more
- View citations associated with schedule titles by simply selecting the title
- Print retention schedule lists and reports
- Manage updates to your retention schedule with complete change management workflow
- Configure change authorizers by job title or department
- Initiate, review, and authorize change requests via the Web
- Fully audited change management

Web Access[1]

- Search and view the corporate records retention schedule
- Generate custom PDF or Excel reports for search results
- Initiate, view, and authorize change requests for schedules
- View messages sent in conjunction with change requests
- Research regulatory requirements to retain records
- View interview data

Automatic Notifications[3]

- *Versatile Notification System* allows you to send automatic emails with customized text and recipient lists for events or processes occurring Versatile, such as change management alerts

1 Included with a 5 or more user license
2 Requires additional services
3 Requires additional software and/or hardware

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