

**ZASIO**

***VERSATILE***

**RETENTIONINT'L™**

**Features List**

# Versatile Retention Int'l™ is a complete retention schedule management and research tool that will keep your global schedule up-to-date and under control. Not only is your schedule instantly available to your employees around the world through our easy-to-use Web interface, but you have direct access to our international consulting team for electronic delivery of updated international research.

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## General Capabilities

- Direct Link to Zasio Consulting
- Citations Updated Continually
- Complete Schedule Management
- Performs Legal Research
- Interview Metadata
- Full Citation Content
- Powerful Security Feature
- Foreign Language Support
- Change Control Workflow
- Built-in Report Designer
- Web Search, Research, and View Schedules
- Automatic Notifications\*

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## Consulting

- The key to Retention International is the ability to receive updates to your schedule and associated international citations directly from the research consultants. One click sends your update request to the Zasio team, and when it's completed, you see the update automatically on your desktop. You also receive an email notification that it has arrived. From there you process the updates through the built-in change control workflow. No more exporting of data, emailing, merging, importing, or losing data—it's all contained in one managed system from beginning to end.

## Research

- 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 industryspecific requirements
- Sort and print retrieved citations
- Imports international research from Zasio consultants

## 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.

## 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
- Automatically notify authorizers of pending change requests
- Initiate, review, and authorize change requests via 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

## 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. International citations are updated on a scheduled basis.

## 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. Zasio has also built in language support for the application so that users can see menus and field labels in their default language. (This feature is still in development.)

## Change Management

- Versatile Retention International 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 simply click an email link to see what has changed and provide approval or updates through a simple Web interface.

## Reports

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

## Web Access

- Search and view the corporate records retention schedule
- 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\*

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

\* Requires additional software or hardware

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