

# SharePoint® and Records Retention

Intersect's *Retention Developer / Manager / Researcher (DMR)* makes it easy to create and maintain a uniform organization-wide, SharePoint-compatible records control schedule!

*Retention DMR* is available with several license options, including *Clark's Encyclopedia of Records Retention* for businesses, and selected state schedules.

## Clark's Encyclopedia of Records Retention™

Over 4,000 business records titles and suggested retention periods

*Clark's Encyclopedia of Records Retention* covers 95% of the business records created and used by businesses and other organizations in the United States.

| Record Series / Sched. | All Item No. | Records Series Title / Description  | Retention Period |         |       |
|------------------------|--------------|---|------------------|---------|-------|
|                        |              |   | Dept.            | Storage | Total |
| 10-2 C10               |              | Abandoned-property ledgers--lists item number, name, date of last entry, account number, amount, and monies refunded  |                  |         | 30    |
| 10-3 C10               |              | Abandoned-property records--deposits or negotiable instruments; includes cross references for multiple parties; used as input to the abandoned-property ledger      |                  |         | 30    |
| 10-4 C10               |              | Abandoned-property vouchers--used to transfer or withdraw abandoned properties  |                  |         | 6     |
| 10-5 C10               |              | Acquisitions, mergers, consolidations, reorganizations, and dispositions--includes agreements, notes, stock certificates, legal documents, and financial workpapers |                  |         | 99    |
| 10-6 C10               |              | Agreements--insurance portion excerpts from agreements showing the name, address, and location of property leased by the company                                    |                  |         | 1     |
| 10-7 C10               |              | Agreements securing debt securities issued  |                  |         | 3     |
| 10-8 C10               |              | Amounts recovered in connection with losses and of claims against insurance companies   |                  |         | 6     |
| 10-9 C10               |              | Analysis or cost reports showing quantities of materials used, unit costs, and number of man-hours in connection with completed construction projects               |                  |         | 6     |
| 10-10 C10              |              | Annexation files  |                  |         | 99    |

For Microsoft® Windows® 7, 8, 8.1, 10

### Retention DMR Major Features:

- Create a Retention Control Schedule for your organization by locating and selecting appropriate Record Types in the *Encyclopedia* with simple point-and-click actions for automatic inclusion in your Control Schedule.
- Create, edit, and revise Record Types and the accompanying retention and descriptive text as appropriate.
- Use the convenient Direct Edit function to add references to your organization's internal forms and document naming conventions as appropriate, to insure uniform company-wide records titles in your Control Schedule.
- Create additional Record Types and descriptions using the built-in editor, and add these to your Control Schedule.
- Create sub-sets of your Control Schedule for individual departments using point-and-click operations to create concise, easily referenced Departmental Control Schedules by selecting only those Record Types appropriate for each department.
- Publish your Control Schedule and Departmental Sub-Schedules in printed form, or publish your Control Schedule and each Departmental Sub-Schedule as an html document, as an Excel® spreadsheet, as an Access™ database, or as a text file.
- Export your Control Schedule and Sub-Schedules to SharePoint, adding links or references to Departmental Sub-Schedules for convenient access when creating documents, determining record type, and assigning retention values.
- In addition to SharePoint, take advantage of Intersect's open file format to import your Control Schedule into your organization's existing records management database to ensure a uniform, organization-wide Control Schedule, or
- Use with Intersect's SQL Server®-based *Records Control and Management System (RCAMS SQL)* to manage your records center. *RCAMS SQL* will use your Control Schedule to encode and calculate retention parameters, and assign retention periods as documents (both electronic and paper) are created and indexed into the *RCAMS SQL* database.

For more information, contact:

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