

Clark's *Encyclopedia of Records Retention* and Intersect's *Retention DMR* software –

A Unique System Supporting Records Retention and Information Management

Clark's *Encyclopedia of Records Retention* and Intersect Systems' *Retention Developer / Manager / Researcher (Retention DMR)* software offer many benefits for the corporate records manager. A few of these:

- **A Standard for Business Records Titles and Descriptions** – A common problem for corporate records managers is inconsistent labeling of records by various departments in an organization. Variations in naming conventions not only among different departments and divisions, but also changes in naming conventions over a period of time, can seriously compromise the integrity of a company's records and greatly complicate the process of identifying and locating records when required. Clark's *Encyclopedia* contains 4,000 standard records titles and descriptive information, derived from years of experience in managing company records, that will help you establish and maintain standard records designations.
- **Retention Suggestions** – Clark's *Encyclopedia* includes suggestions for records retention and disposition for each of the 4,000 records titles, based on company practices that have been researched and documented over a period of years.
- **An Easy-to-Use Research Tool** – A convenient *Find* function allows the user to search the *Encyclopedia* for any word or phrase in any of the records titles and descriptions included. A *Query* function allows the user to select and display all records titles and descriptions containing a specified word or phrase, and a multi-step capability makes it easy to define successive queries to "drill down" on any desired subject.
- **Convenient Point-and-Click Revision and Editing of Retention Series** – A user can easily revise, modify, or add to any record title, description, retention suggestion, or comments in the *Encyclopedia*.
- **Citation / Comments List Manager and Insertion Editor** – As much as we might wish otherwise, there is no "one size fits all" set of criteria for records retention. The nature of a business, the states a company operates in, and various other business considerations, all affect the retention requirements for various documents. Further, the Code of Federal Regulations – the most authoritative source for statutory retention requirements – doesn't include the majority of records created by businesses today. For records managers, researching various sources and identifying retention requirements, and adding citations or references to appropriate sources to a control schedule, goes with the territory. *Retention DMR* includes a unique *Citation / Comments List Manager and Insertion Editor* that makes it easy to add citations and comments to any records title.
- **Disposal Suspension Statement and Editor** – Numerous recent lapses in managing records in the business world have underscored the necessity for establishing a specific policy defining the circumstances under which disposal of records will be suspended, regardless of the retention specified in a control schedule. Such circumstances can include litigation or a threatened lawsuit, or investigation by a government agency. Further, it is important that the disposal suspension policy be communicated to department managers and other employees. *Retention DMR* supports development of a disposal suspension statement, and publication of the statement with the retention control schedule and departmental sub-schedules.
- **New Record Series Title Creation** – Even with 4,000 business records titles, most companies will have a need for several titles not included in the *Encyclopedia*. *Retention DMR* makes it easy to add new records titles and associated descriptive and retention information, and to include these in the retention control schedule you develop.
- **Convenient Retention Control Schedule Publishing** – *Retention DMR* offers several options for publication of the completed control schedule. The control schedule can be published in print on any Windows®-compatible printer, or the schedule can be published over a Local or Wide Area Network using *Retention Viewer* software from Intersect. The control schedule can also be published on the Internet or a private intranet with any recent version of Microsoft® Office® using a special export function in *Retention DMR*.
- **Point-and-Click Creation of Sub-Schedules** – A successful records management program requires the awareness and participation of all employees. It is important that the retention control schedule and periodic updates be communicated and understood throughout the company. However, a comprehensive retention control schedule can run to well over a hundred pages containing hundreds of records titles. *Retention DMR* supports the easy creation and publishing of sub-schedules for various departments or divisions within a company, allowing distribution of only the records titles and retention requirements appropriate for each department. This typically results in much shorter sub-schedules – often less than a dozen pages -- with each department sub-schedule containing only the records titles for which the department is responsible. Concise sub-schedules can be an important factor in enlisting departmental cooperation and support in a records management program.

For more information: *These are just some of the features of Intersect Systems' Retention DMR software and Clark's Encyclopedia of Records Retention. For more information on Retention DMR and Clark's Encyclopedia, e-mail Intersect Systems at intersect@newintel.com or call us toll free at (888) 745-4151.*