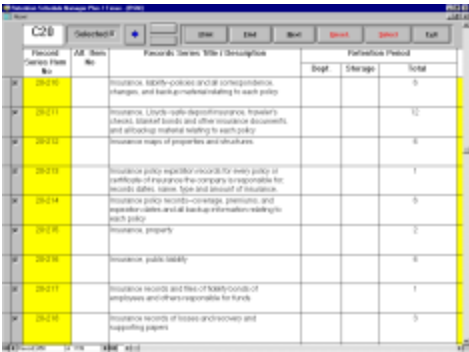


INTERSECT'S RETENTION SOFTWARE SYSTEMS

Intersect Systems Inc.'s *Encyclopedia of Records Retention* by Clark is a software database that is designed for use with special retention software from Intersect that allows the user to access over 4,000 records types and their appropriate retention periods, broken down into 23 major functional classifications.

Intersect offers two Windows™-based software applications for use with the *Encyclopedia of Records Retention* database. These applications include *Retention Viewer / Researcher (Retention VR)*, a basic viewer with search and query capabilities, and *Retention Developer / Manager / Researcher (Retention DMR)*, a full-function system with search and query capabilities that also includes an extensive set of retention schedule development and publishing functions.

The applications are compatible with computer systems running Microsoft® Windows 95, 98, ME, NT, and 2000 operating systems.



Records Type No.	Description	Legal	Storage	Total
20210	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20211	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			12
20212	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20213	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			1
20214	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20215	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			2
20216	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20217	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			1
20218	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0


Retention Main Browsing Screen

Retention Viewer / Researcher:

The *Retention Viewer / Researcher* software application, when used with the *Encyclopedia of Records Retention*, offers Records Managers in an organization access to the extensive set of records titles and guidelines for appropriate records retention and disposition.

Retention VR and the *Encyclopedia* become a PC-based electronic reference with which the user can view all of the more than 4,000 records types along with their appropriate retention periods. The Search function in *Retention VR* makes this a powerful system for searching on any word or phrase in the *Encyclopedia* records types and related descriptions field, with convenient point-and-click operations to quickly move through the entire contents, viewing each entry.

The powerful Query function in *Retention VR* allows the user to query the *Encyclopedia* Records Types and related descriptions on any word or phrase, selecting those Records Types and descriptive text that match the query. Each query can be refined and extended to quickly drill down on any subject or category that is being researched. Point-and-click operations make the Query function intuitive and very easy to use.



Records Type No.	Description	Legal	Storage	Total
20210	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20211	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			12
20212	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20213	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			1
20214	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20215	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			2
20216	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0
20217	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			1
20218	Insurance: 100% policies and all correspondence, changes, and back-up/maintenance for each policy			0

Entering A Query

Retention Developer / Manager / Researcher:

The *Retention Developer / Manager / Researcher* software application includes all of the Search and Query functions of *Retention Viewer / Researcher*, but adds several powerful and unique capabilities:

- *Retention DMR* allows the Records Manager to create a Retention Control Schedule for an organization by locating appropriate Records Types in the *Encyclopedia*, and selecting each of those Records Types for automatic inclusion in the Retention Control Schedule being created with a simple point-and-click action.

- Records Types and the accompanying descriptive text, along with the associated information, can be edited or revised as appropriate based on local circumstances or other factors if desired.
- Additional Records Types and descriptions can be created by the Records Manager using the built-in editor in the *Retention DMR* software. These then become a custom extension of the Encyclopedia for the particular organization.
- Once created, a Retention Control Schedule can be published for distribution to various departments, divisions, and operating units within an organization. Publication options include: (1) publishing and distribution on paper, from a master copy printed with the *Retention DMR* system; (2) publishing and distribution electronically over a Local or Wide Area Network for viewing throughout an organization using optional Retention Schedule Viewer software from Intersect Systems; and (3) publishing on an intranet or the Internet by creating an output file of a Retention Control Schedule using a function in the *Retention DMR* software, and conversion of the output file to an .html file using Microsoft Office 95, 98, 2000, or XP. An Internet site management tool such as Microsoft Front Page can then add the .html file to an organization's internet site.
- The *Retention DMR* software includes the unique ability to create sub-schedules for various departments within an organization from a Retention Control Schedule that has been created with the software. Sub-schedules can be created easily using point-and-click selection of Records Types and associated descriptions from the master Control Schedule.

The ability to create sub-schedules can be a significant benefit in implementing an effective records management program in any organization. Consider the fact that a comprehensive master Retention Control Schedule in a medium-sized company can easily run from one to two hundred pages or more. However, for most individual departments, less than ten percent of such a comprehensive Control Schedule would typically apply to the records for which that department is responsible. Expecting department managers to be sufficiently familiar with a comprehensive Control Schedule to identify and help manage their records is often unrealistic.

However, creating a retention sub-schedule for each department, with each sub-schedule consisting only of the records types for which a particular department is responsible, is a much more satisfactory solution. A sub-schedule for a department that consists of ten pages instead of more than a hundred pages, with all of the records types in the ten page sub-schedule applying to that department, is a much more satisfactory and workable solution for engaging managers throughout an organization in the records management process and establishing and maintaining an effective records management program.



Retention Sub-Schedules Created

- When used with Intersect's *Records Control and Management System* (RCAMS) database software for records center management, the *Encyclopedia of Records Retention* and the *Retention DMR* system can be used to encode retention parameters; the retention control schedule created will communicate with the RCAMS database to calculate retention periods as containers are created.



Entering Parameter for Automatic Calculation of Disposal Date

For more information on Intersect Systems Inc. and the *Retention VR* software and *Retention DMR* software, contact Intersect at (972) 641-7747, or at either of the following e-mail addresses: newintel@newintel.com or intersect@intersectsystems.com.

For updates and additional information, visit the Intersect Systems web site at www.intersectsystems.com