



# VIRGO EMPLOYEE PORTAL

ENABLE REAL-TIME, READ-ONLY VIEWS INTO  
YOUR ORGANIZATION'S RETENTION AND  
RECORD INFORMATION

The Virgo Employee Portal brings published retention, privacy and record information from Virgo to the fingertips of all employees through easy to use yet detailed searches and views.



#### **Improve communication and visibility around record retention, privacy, and security handling**

Easy search, filter, and sort functions for typical employees



#### **Address retention across the organization simply**

Automated sync of published retention schedule in Virgo



#### **Centralize and scale solution for thousands of employees**

Hosted within your organization's intranet or SharePoint pages



#### **Empower employees to self-service information**

Customizable user experience for different audiences (i.e., departmental view)



#### **Inform information governance and compliance obligations**

Delivery of up to date, published retention policy information

## Scale Your Retention Efforts Across Your Organization

While Virgo will make sure your retention policies are defensible, the Virgo Employee Portal will ensure your entire organization is informed and aware of their record keeping obligations. The Virgo Employee Portal delivers retention instruction at scale to unlimited users within your organization through simple web-based views and searches based on keywords and content types (categories for frequently used documents and records within your organization).

This approach to policy management promotes a level of scale, configuration, efficiency and security that cannot be achieved in using a static spreadsheet or PDF to maintain retention schedules and policy guidance.

## Straightforward Searches and Views

Policy information is seamlessly delivered with the Virgo Employee Portal to an unlimited number of users at no additional cost or effort. Each view within the Portal supplies information on retention policies and the details on the types of content affected by the policy. It is 'read only' and will dynamically display any changes made to record series that are published.

Each of the four views can be configured to provide unique information (i.e., field display, sort options, filters) tailored to the audience, allowing you to publish a single, company-wide view or a view for individual functions, departments, countries, etc. This level of flexibility and customization create dynamic and tailored user experiences in understanding a corporate retention schedule.

## The four different views available in the Virgo Employee Portal are:

### Retention Search

In this predictive search style view, employees can search by document or content type, display all the record series with that content type, easily see how long to retain records from the quick result list and gain access to more details.

**Retention Search**  
Quickly find the retention rule for a record without the need to understand the structure of the retention schedule.

**FIN1000: Accounts Payable and Receivable**

Code: FIN1000  
Name: Accounts Payable and Receivable  
Description: Records related to the payment of financial obligations and to the documentation of cash payments received. Records verify the purchase or supply of goods and services, the accuracy of the invoice, and authorization for payment. Includes check requests, vendor invoices, cash disbursements, commission accounting, sales incentive bonuses and payouts, employee expense documentation, petty cash, cash receipts, supporting documentation and reports, collection records, and uncollectable accounts. Also includes reports on any media necessary to document and substantiate this activity. Does not include government accounting for NPS records. See CSS1000 and CSS1010 for Client Billing. See FIN1250 for Government Accounting.  
Function: Financial  
Public Notes:  
Retention: 7 Years  
Trigger Event:  
Disposition Action:  
Content Types:

- Checks
- Files
- Paid Bills

Privacy:  
Information Owner:  
Defining Authorities:

- CAL. REV. & TAX. CODE § 19141.6(e)(2)(A)(1)
- CAL. REV. & TAX. CODE § 19141.6(e)(2)(G)(1)

### Content Type Search

Employees search by content type and quickly find the retention policy, privacy and security classification, details on the repository where the content is stored and more.

**Content Type Search**  
Quickly find the retention rule, privacy classification, security classification, and other requirements for content using a simple search.

**Drug Tests**

Name: Drug Tests  
Description:  
Access:  
Criticality:  
Vital: No  
Information Owner: Jack Northrop

**Record Series**

| Code    | Name              | Retention | Trigger Event | Exceptions |
|---------|-------------------|-----------|---------------|------------|
| HUM1115 | Background Checks | 6 Years   |               |            |

**Repositories**

|                      |            |  |                   | Record |
|----------------------|------------|--|-------------------|--------|
| Carta HR             | Electronic |  | Cloud Application | No     |
| Exchange             | Electronic |  | Email             | No     |
| Offsite Storage      | Physical   |  | Offsite           | No     |
| Sharepoint and Teams | Electronic |  | Cloud Application | No     |

### Content Types

Employees search, filter or browse a grid of your organization’s content types to find the retention policy, privacy and security classifications and repositories for the selected content type.

**Content Types**  
Search or browse content types to find the retention, privacy and security classifications for your content using a grid similar to the Content Types tab in Virgo.

**Account Ledgers**

Name: Account Ledgers  
Description:  
Access:  
Criticality: important  
Vital: No  
Information Owner:  
Record Series

| Code    | Name           | Retention | Trigger Event | Exceptions |
|---------|----------------|-----------|---------------|------------|
| FIN1220 | General Ledger | 20 Years  |               |            |

**Repositories**

|           |            |  |             | Record |
|-----------|------------|--|-------------|--------|
| SAP EAM 2 | Electronic |  | Application | Yes    |

### Retention Schedule

Employees can search, filter or browse a grid of your organization’s published record series and determine how long to keep records. This view mimics the Record Series tab in Virgo.

**Retention Schedule**  
Search or browse your retention schedule using a read only, table view, similar to the Record Series tab in Virgo.

**FAC1060: Real Estate Appraisals**

Code: FAC1060  
Name: Real Estate Appraisals  
Description: Records related to the valuation of real property. These records may be used to evaluate real estate acquisitions, dispositions or valuation for book value purposes. Includes land and building appraisals. Does not include contracts and agreements.  
Function: Facilities  
Public Notes:  
Retention: 6 Years  
Trigger Event: Sale of Asset  
Disposition Action:  
Content Types:

- Building Appraisals
- Land Appraisals

Privacy:  
Information Owner:  
Defining Authorities:

- CAL. REV. & TAX. CODE § 19141.6(e)(2)(C)(1)

## Easy Implementation

The configuration flexibility of the Portal into your organization's corporate intranet facilitates employee adoption and use. Determined by the desired user experience and your organization's user authentication requirements, there are three implementation options for the Virgo Employee Portal:

- Hosted within your organization's intranet with optional CSS
- Displayed within an inline frame on a webpage
- Embedded into a SharePoint (on premises or Microsoft 365) site page

The Virgo Employee Portal supports Google Chrome, FireFox, Safari, and Edge

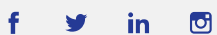


To find out how Virgo by Access can help your business, contact our team today at **1.877.345.3546** or visit us online at **AccessCorp.com/virgo**.

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### About Access

Access is the largest privately-held records and information management services provider worldwide, with operations across the United States, Canada, Central and South America. Access provides transformative services, expertise, and technologies to make organizations more efficient and more compliant. Access helps companies manage and activate their critical business information through offsite storage and information governance services, scanning and digital transformation solutions, document management software including CartaHR, CartaDC and CartaDC Essentials, and secure destruction services. For 11 consecutive years, Access has been named to the Inc. 5000, the ranking of fastest-growing private companies in the U.S.