

Document Retention

What It Is

The OnBase Document Retention module manages the retention and disposition of stored documents according to pre-defined business rules initiated by the passage of time on a document type level.

How It Works

Authorized users configure their documents based on a **Static** or **Dynamic** retention rule within a Document Type or Document Type Group for automatic destruction and/or removal from the OnBase document repository.

Documents associated with a **Static** retention rule are automatically marked for deletion after a predefined retention period has been met, based on the document's creation or process date. For example, an authorized user can designate that a daily production report automatically be purged 10 days after its creation date.

Dynamic Retention allows the date of deletion to be determined based on a custom system Workflow, VB script, or external action made in a line of business application. For example, if an employee leaves a company, the release date entered into the Payroll system could initiate a three-year retention period.

An administrator schedules a Retention Process to run periodically to purge documents that are marked for deletion. The administrator has the option of retaining keywords when deleting the files. A purge function can be executed to delete the documents completely to prevent the files from being retrieved using disk management utilities.

Authorized users can designate particular documents to be excluded from the retention and purging process to address legal or "hold order" requirements.

Who Will Benefit

Organizations seeking to comply with corporate and legal regulations are assured that documents are properly secured, retained and expunged. The ability to tailor a retention solution to address requirements saves an organization costs in terms of labor, time and money, allowing the focus to be on its business-critical processes.

Technical Features

- Retention processes can be configured to delete expired files and keywords or files only
- Manages documents using both time-based and event-base retention processes
- Authorized users can place records on hold

Business Benefits

- Establishes a structured policy that reduces costs in researching and removing documents to address compliance issues
- Provides a consistent process for deleting documents, resulting in reduced space, time, and costs
- Regular purging of documents with no business value reduces exposure to legal action based on redundant content

System Requirements

- Document Retention License
- OnBase Client License