

## OnBase Records Management

### What It Is

Many documents play a long-term role in corporate governance, compliance or historical record. They become “fixed” content that serves as evidence of transactions, decisions or processes. The OnBase Records Management module controls the retention of all associated business records securely organized within the OnBase Folders Interface. The retention cycle of a folder is triggered by an event, which ties records management strategies into organizational business processes. The module provides cutoff periods, retention schedules and multiple destruction options to meet all record retention strategies. OnBase Records Management also offers exception handling as well as an administrative management interface.

### How It Works

OnBase Records Management uses the OnBase Folder Interface to create managed folders. These managed folders are used to securely control business records in an organized structure. Each managed folder is assigned a specific retention plan, which controls the retention period of all associated documents included in the managed folder. A managed folder can contain documents and content from virtually any source, consolidating scanned images, faxes, desktop documents, e-mails and more.

A retention plan contains a set of rules that enable an organization to manage the complete life cycle of a record from document creation to record declaration through final disposition. Authorized users can control the status of a record, such as adding new documents to an open record. A closed status indicates that a record has been declared and the contents cannot be modified. Once a record has been cut off, a defined retention period commences according to event-based (e.g., employee separation, mortgage pay off or account closure) and/or time-based (e.g., a period of months/years) business rules. The Records Management Administrator View displays the disposition status of records and provides the ability to place holds on records and post events that trigger the retention plan.

### Who Will Benefit

Records Management is not market or industry specific; however, it has proven value in any organization that is required to securely manage all documents used to make key business decisions. This module assists organizations with compliance initiatives and provides the tools to effectively manage all electronic content across an enterprise. OnBase Records Management provides a one-stop-shop for organizations looking to manage all electronic business records within an ECM solution.

#### Technical Features

- Built using the OnBase Folder Interface
- **Event Sets** are used to define business events that trigger retention
- **Holds** are available to temporarily lock down a folder a prevent destruction
- **Auto-folding** is deployed to automate the declaration of records
- **Administrative View** can be used to monitor all managed folder across the enterprise and approve them for destruction

#### Business Benefits

- Enables complete document life cycle management
- Improves consistency and precision by managing multiple documents as a single record
- Ensures timely disposal of records
- Automatically declares documents as records
- Mitigates legal risk

#### System Requirements

- OnBase 5.0 or higher
- Supported in the Client and Web Client modules
- Valid Client License
- Web Server License (optional)

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