

## 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 or the occurrence of an event. Authorized users configure their documents within a Document Type or Group for automatic destruction and/or removal from the OnBase document repository.

### How It Works

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 extends this model to allow documents to be routed through OnBase Workflow or accessed by an external program. Using the full functionality of OnBase, administrators have the ability to initiate a retention process based on an event, define a complex evaluation process or route documents through a series of lifecycle phases. 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. OnBase provides the administrator the option of retaining keywords when deleting the files. A Disk Scrub 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 records 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

- Manages documents using both time-based and event-base retention processes
- Authorized users can place records on hold to address legal requirements
- Retention processes can be configured to delete expired files and keywords or files only
- Administrators have the option to scrub the disk system to prevent a file from being recovered

### 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

- OnBase client License
- Is using dynamic retention workflow license is required
- Server operating systems: Windows NT 4/2000 Server
- SQL Server 7/2000, Oracle 8+, Sybase SQL Server 11.5, Sybase SQL Anywhere 5.5.04/7.0.1

**HYLAND**  
**SOFTWARE**

28500 Clemens Road • Westlake, Ohio 44145 • p.440.788.5000 • f.440.788.5100 • www.onbase.com

©Hyland Software, Inc.