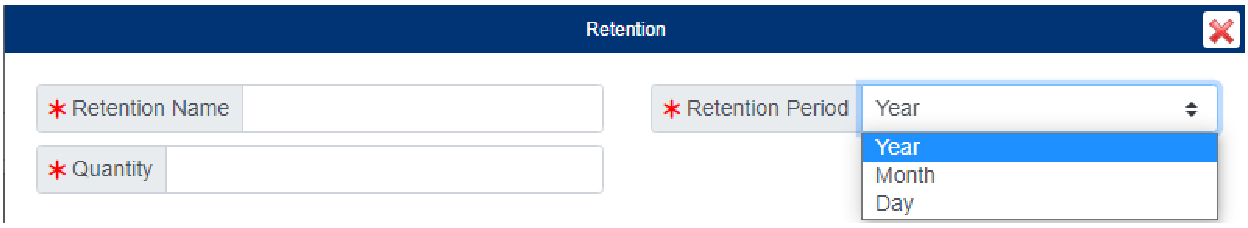
Manage Retentions

Records retention and purging is defined based on your record guidelines.

Retention Name	Period	Quantity	Delete
1-Month	Month	1	
1-Never	Year	0	
10-Year	Year	10	
3-Year	Year	3	
30-Days	Day	30	
6-Months	Month	6	
Never	Year	999	

Add Retention

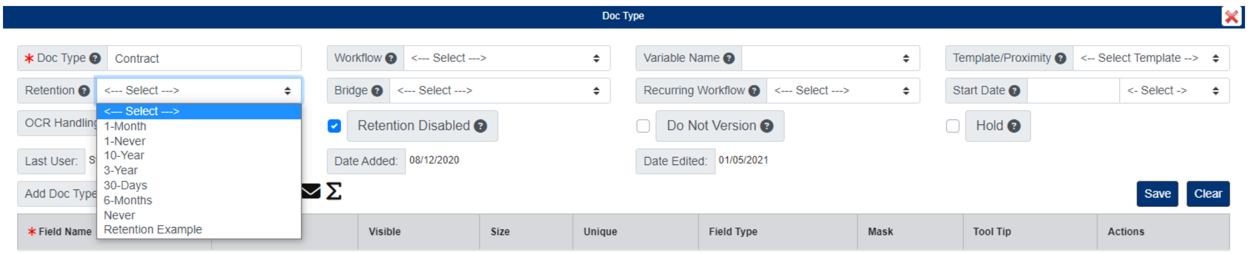
1. From the menu on the left side, go to Admin > Fileroom > Retention Settings.
2. Click the Add Retention button.



3. Enter the Retention Name.
4. Select the Retention Period.
5. Enter the Quantity.
6. Click Save.

Assign Retention to a Doc Type

1. From below the admin menu, click the Doc Types
2. Click the document type you want to open under the Doc Type column.
3. In the pup-up window, uncheck Retention Disabled, then select the retention you want to assign to the Doc Type using the Retention field.



4. Click Save when finished.

Retention Check

This page shows only existing documents that have reached their retention period.

1. From the menu on the left side, go to Admin > Fileroom > Retention Check.
2. All documents listed have reached their retention period. You can use the search fields to filter the document list if needed.
3. From the Fx menu, you have the option to Delete or Export documents that have reached their retention period.