



# Integrated Data Services, Inc.

# Modules for DocuWare

## Doc Retention

### Document Life Cycle Control

The DocRetention module enables full control of document retention policies. It enables processing documents for retention type activities (eg. Archiving, Deletion, Transferring, etc.), based on Date Field, Document Type and Document Status, with assigned Action Method.

### Functionality:

The IDS DocRetention module enables the creation of profiles for various document types, user defined actions, and processing 'Periods'. Processing is performed in 'Jobs', which use profiles configured to use DocuWare Cabinets, selected for 'Retention Processing'. Each 'Job' is linked to a query to be executed. Associated actions consist of updating a designated 'Status' field, 'Deleting', 'Moving' or 'Copying' documents to archive cabinet(s) and/or basket(s). Jobs can be run 'Automatically' or Manually.

### Standard features in DocRetention

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#### Standard Features

- Policy and Job Editor
- Actions include: Deletion, Copy and Transfer
- Command Line Operation
- Flexible Job Queue
- Retention of Job Profile
- Retrieval of Job Results
- Operation Log

### IDS DocRetention Main Screen

### Policy Editor

### Job Details (per policy and docuware profile)

### Other:

#### System Requirements

1. Software: DocuWare 4.5 or higher with one full function license