



## Retention

### The Challenge

Retention will typically be an activity carried out within a business to meet regulatory requirements. It's not typically optional and the benefit of exercising good records retention are principally reduced risk of either a breach or regulatory enforcement and penalties.

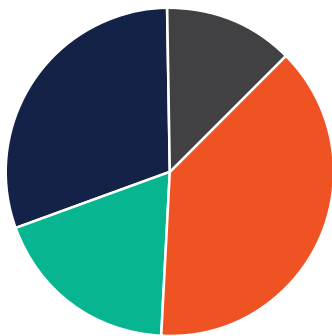
However, there are significant benefits to undertaking your business's records retention activities with DocAuthority. That is because uniquely DocAuthority will segregate all documents of a given type (performance reviews, purchase orders, invoices, etc) into a single category where they can be treated as a single entity. This means that retention activities which are otherwise very labour intensive to undertake and possibly impossible to evidence are now very straight-forward and easy to report on.

### Retention Schedule

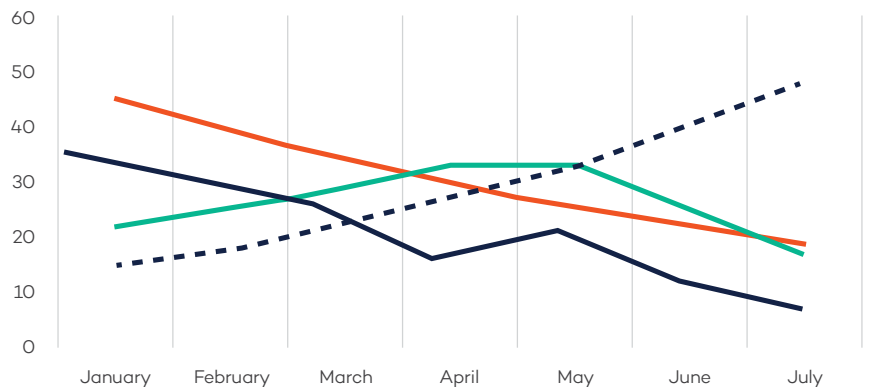
The table opposite shows the typical documents which might be included within a retention schedule. The work to align the retention of these documents with any published retention schedule is very significant. Equally, it is very hard to evidence that retention in a business is aligned to any published retention schedule or policy.

Document	Retention Period	Action	Accountable
Performance reviews	6 years	Destroy	Head of HR
P11D	6 years	Destroy	Head of HR
H&S Survey	12 Years	Destroy	Head of Facilities
H&S Near miss	12 years	Destroy	Head of Facilities
Purchase Order	9 years	Destroy	Head Finance
Invoice	7 years	Destroy	Head Finance
Customer complaint	6 years	Destroy	Head of Customer Services

### Reporting on retention schedule conformance with DocAuthority



■ UNKNOWN     ■ NON-CONFORMANT  
■ IN PROGRESS     ■ CONFORMANT

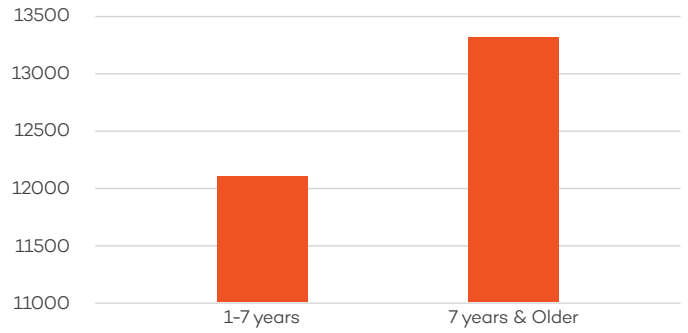


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— IN PROGRESS     - - - CONFORMANT

## Retention Capability

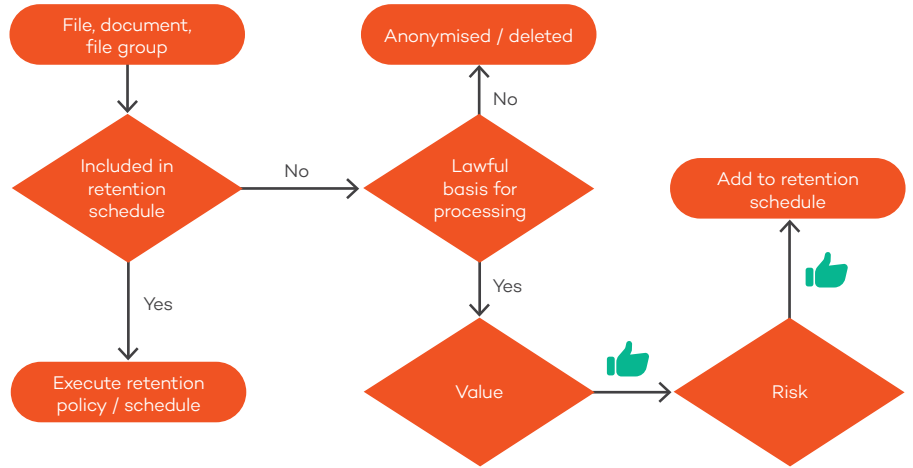
With DocAuthority, grouping documents together which are the same (and therefore have the same retention period) is completely automated. Any date partition can be configured so that all documents beyond their retention period can be managed as a single entity. In the example opposite over 13K files can be quickly and easily moved onto offline storage ready for final deletion. And that's not just for one specific type of document – that's for all your operationally significant files.

P11ds by age



## Identify silos of data quickly

But what about silos of sensitive information that may not be on your retention schedule? DocAuthority can quickly and surface repositories of PII so that you can either delete the data or add it to your retention schedule. If you've got documents tied to external retention events – we can help with that too.



## The DocAuthority Benefit

Retention is never going to be a quick or easy job. However, at DocAuthority we believe in making the job as quick as easy as it possible can be. Not only can DocAuthority maintain business document retention schedules it can reduce the overhead of applying retention rules to very large historical repositories of data.

We believe organisations must get in front of what is often years (and in some cases, decades) of data.

We are helping businesses like yours right now ensure their personal data is aligned to published retention policies.

We're helping them demonstrate to risk and audit stakeholders that information is safeguarded appropriately.