



## Banner® Document Retention

IMPROVE EFFICIENCY AND COMPLIANCE WITH INTEGRATED DOCUMENT DISPOSITION

Manual processes for defining, locating, and removing expired document records can be cumbersome, costly, and prone to errors, leaving higher education institutions in need of a more effective way to establish, apply, and audit document retention schedules and disposition rules across campus.

Banner® Document Retention provides a cost-effective solution for campus-wide document retention and disposition challenges, including:

- Identifying and purging expired documents and metadata
- Articulating retention policies based on Banner data and metadata
- Reducing error and overhead in manual file purge processes
- Managing document lifecycle and legal risks

Banner Document Retention uses familiar Banner® by Ellucian data and technology to automatically dispose of documents stored in its companion solution, Banner® Document Management, according to flexible document disposition rules and institutional policy.

## REDUCE OPERATING EXPENSES AND RISKS

By applying document retention and disposition rules, you can reduce the operating expenses and legal risks associated with keeping unneeded documents. When unnecessary information is removed, staff and faculty access the right documents faster through accelerated information searches and network performance. Likewise, efficient removal of unneeded information elevates institutional data stewardship and privacy protection.

## APPLY INSTITUTIONAL POLICY VIA SHAREABLE, FLEXIBLE RULES AND FAMILIAR TOOLS

Document retention and disposition rules in Banner Document Retention can span both Banner data and document metadata in Banner Document Management. This allows for flexible articulation of rules and logic to determine the disposition status of documents campus-wide. Document retention rules are shareable across internal instances, as well as across institutions via Ellucian Community Source Initiative and Shared Code Repository, enabling faster deployment and easier application of standards in information retention policies. In addition, you can update any Banner Document Management document metadata in bulk through rules processing and launch workflow processes for many documents at the same time.

## OPTIMIZE INFORMATION STORAGE SPACE, NETWORK RESOURCES, AND BACKUPS

Banner Document Retention facilitates removal of unneeded documents and metadata, improving information storage, network traffic, and backup efficiencies. By removing both unneeded documents and associated metadata, Banner Document Retention ensures that the information in file storage and databases is relevant and necessary according to institutional record-retention schedules.

## USE EXISTING INVESTMENTS IN ELLUCIAN SOLUTIONS AND EXPERTISE

Banner Document Retention uses familiar Banner and Banner Document Management tools and technology, so you get more mileage out of the solutions you already have. Administration, scheduling, rules articulation, and bulk disposition apply existing Banner technologies and patterns, reducing training time and overall system costs.

## KEY FEATURES

Banner Document Retention enables:

- Disposition of Banner Document Management documents and metadata according to flexible disposition rules, institutional policy, and audit
- Use of Banner data and Banner Data Management index metadata within disposition rules articulation, evaluation, and execution
- Use of familiar Banner tools, interfaces, and job scheduling elements
- Flexible update of document index metadata for other needs in document lifecycle management, access control, or workflow processing
- Disposition of documents and metadata in any Banner Document Management document collections, whether or not they are related to Banner records or business areas
- Holding documents from document and metadata disposition
- An audit trail of information about document dispositions

## ABOUT ELLUCIAN

Ellucian helps education institutions thrive in an open and dynamic world. We deliver a broad portfolio of technology solutions, developed in collaboration with a global education community, and provide strategic guidance to help education institutions of all kinds navigate change, achieve greater transparency, and drive efficiencies. More than 2,400 institutions in 40 countries around the world look to Ellucian for the ideas and insights that will move education forward, helping people everywhere discover their futures through learning.

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