

# **iRetention Manger** Administration Manual

Version 3.9 SP1

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# Introduction

iRetention Manager allows an organization to create and manage retention profiles that contain user defined criteria enabling iSynergy to automatically purge documents. Using iRetention Manager, a specific time period can be associated to an iSynergy application. In addition, iRetention Manager will allow an organization to define a trigger date for a document which will officially begin applying the retention period policy based on that trigger date.

# **Installing iRetention Manger**

To install iRetention Manager, follow the below procedure.

1. In the iSynergy Installation folder, navigate to **Server>Utils**.



2. Select iRetention Manager.msi



Note: The iDatix – iRetention Manager Setup dialog displays.

3. Select Next.



Note: The iDatix – iRetention Manager Setup License Agreement displays.

- 4. If the license agreement is acceptable, select I accept the license agreement.
- 5. Select Next.



Note: The iDatix – iRetention Manager Setup dialog displays. If you wish to change the Destination Folder, select Browse and follow the prompts. If you wish to leave the destination folder, skip to step 6.

6. Select Next.

🛃 iDatix - iRetention Manager Setup	_ 🗆 🗙
Destination Folder Select a folder where the application will be installed.	ίο Ιολτίχ
The Wise Installation Wizard will install the files for iDatix - iRetention Manager in following folder.	the
To install into a different folder, click the Browse button, and select another folde You can choose not to install iDatix - iRetention Manager by clicking Cancel to e Wise Installation Wizard.	r. xit the
Destination Folder	
C:\Program Files\iDatix\iRetentionManager\Brows	e
Wise Installation Wizard (R)	Cancel

7. Select Next.



Note: iRetention Manager begins to install.

🚏 iDatix - iRetention Manager Setup	
Updating System The features you selected are currently being installed.	ίοςτιχ
Writing system registry values	
and an	

8. Select Finish.



9. iRetention Manager is installed and a shortcut placed on your Desktop.



## **iRetention Manager Login**

To login to iRetention Manager, follow the below steps.

1. Navigate to Start>All Programs>iDatix>iRetention Manager.



Note: The Login to iRetention Manager dialog displays.

- 2. Enter your the User Name.
- 3. Enter your **Password**.



4. Select Manage.



Note: The Alias Manager dialog displays.

5. Define the **Server Name**.

Alias Manager		
Alias	URL	
		1
		4
		]
> Server Name or U	RL esx5-w2k3-amy	
and a second		La she a she was she she she she

- 6. Select Load.
- 7. Select OK.

Alias Manager	
Alias	URL
Default	http://esx5-w2k3-amy/applicationserver/authenticationservice.asmx
Server Name or URL	esx5-w2k3-amy Reload All
	OK Cancel

Note: The Login to iRetention Manager dialog displays.

8. Select Login.

Login to iRetention M	anager DATIX
User Name Password Server	sysadmin ****** Default
Login	<u>Cancel</u> <u>S</u> erver

# **iRetention Manager User Interface**

This section describes the iRetetion Manager User Interface and its functionality.

## File Menu



## Toolbar

This section describes the iRetention Manager Toolbar functionality

Element	Description
Add Profile	Provides the ability to launch the Retention Profile dialog and add a new iRetention profile.
Edit Profile	Provides the ability to launch the Retention Profile dialog and edit an existing iRetention profile.
Delete Profile	Provides the ability to launch the Retention Profile dialog and delete an existing iRetention profile.
Search Documents to Purge	Provides the ability to search for documents as defined by the selected iRetention profile to purge from the database and repository.
Purge Documents for Checked Profiles	Provides the ability to purge documents from the database and repository as defined by the selected iRetention profile
Stop Search/Purge	Provides the ability to stop a search or purge from the selected iRetention profile.

#### **iRetention Profile**

Element	Description
Profile Name	Provides the ability to uniquely name the Retention profile name.
Application	Provides the ability to select a defined and implemented iSynergy Application from the drop down menu. This Application contains the documents that will be purged.
Trigger Date>Index	Provides the ability to select a system or user defined date from the aforementioned iSynergy Application.         Image: Date Date Date Date Date Date Date Date

Document Retention>Number of Periods Provides the ability to define a numeric value for the Retention period.

ر ۲۵	ocument Retention
3	Number of Periods 1 📑 🔶
Maria	a second second second second second second

Note: The Retention Period is used in combination with the Trigger Date to determine when a document is to be purged.

**Document** Provides the ability to define a retention period that can be Days, Months or Years.



Provides the ability to define an index from the aforementioned iSynergy Application in a drop down menu.



Note: iSynergy UDL values further restrict which documents within an application are to be purged. If a selected iSynergy Application does not have a UDL representing a document type or a document type is not selected by the user, all the documents within the application are purged based on the date/retention period criteria.

Provides the ability to define a value from the aforementioned iSynergy Application in a drop down menu.



Note: If the iSynergy Application does not have a document type UDL, these fields are disabled. Additionally, if all document types have been selected for other profiles that use this same iSynergy Application these fields are disabled.

Document Type>Value

Document

Type>Index

**OK** Provides the ability to save and close the iRetention Profile dialog.

**Cancel** Provides the ability to cancel the Retention Profile dialog.

#### **iRetention Manager Workspace**

The iRetention Manager Workspace provides a simple to discover design in order to quickly understand the number of documents to be purged from the iSynergy repository.

🖀 iRetention Manager						
File Action About	File Action About					
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	15 documents to purge. 1/19/2007 thru 1/19/2007
Checks	Checks	CreateDate	5 Years			32 documents to purge. 1/19/2003 thru 1/19/2003
Invoices	Invoices	CreateDate	3 Years	Status	Paid	29 documents to purge. 1/20/2005 thru 1/20/2005
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume	20 documents to purge. 1/19/2007 thru 1/19/2007
المنعمين			Lannan .	and A		and the second sec

Element	Description
Profile Name	Displays the name of the defined Retention Profiles.
	Note: In this view, you can double click the Profile name and display the Retention Manager dialog.
Application	Displays the name of the iSynergy Application for the defined iRetention Profile.
Trigger Date	Displays the Trigger date for the defined iRetention Profile.

/***	
2	Trigger Date
	CreateDate
ţ	CreateDate
Ş.	CreateDate 🔰
ξ	CreateDate

**Retention Period** Displays the time period the documents will be retained and then purged for the defined iRetention Profile.

	and second a second second
$\sum_{i=1}^{n}$	Retention Period
5	1 Year
$\langle \rangle$	5Years
Į,	3 Years
Ę	6 Months
Ū.	أأبر مسمى باسمار يختطرهم

**Doc Type** Displays the iSynergy Application document type for the defined iRetention Profile.

5		~~~~
	Doc Type	
1	HR Doc Typ	be 🕴
Ş		1
3	Status	
2	Doc Type	
),		المندد

**Doc Type Value** Displays the document type as defined within the iSynergy Application document type.

-	<u> </u>	Ύ.
4	Doc Type Value	1
Ĩ	Vacation	
Ś		
ξ	Paid	
8	Resume	
1	بيده فقيحته فيقر مراهيت	- 1

Status	Displays the status of the defined iRetention Profile.		
	Status		
	15 documents to purge. 1/19/2007 thru 1/19/2007		
	32 documents to purge. 1/19/2003 thru 1/19/2003		
	29 documents to purge. 1/20/2005 thru 1/20/2005		
	20 documents to purge. 1/19/2007 thru 1/19/2007		
	A second control of the control o		

Provides the ability to exit the iRetention Application.



### **iRetention Manager Bottom Toolbar**

The iRetention Manager bottom toolbar provides the ability to quickly discover the status, date and connected Server.

Ready	1/20/2009 esx5-w2k3-amy
Element	Description
[State] Ready	Provides the ability to know the current state of iRetention Manager.
[Date] 1/20/2009	Displays the current date.
[Server] esx5-w2k3- amy	Displays the current server the user has accessed.

## Working with iRetention Manager

iRetention Manager provides a simple interface, enabling you to automatically purge records from the iSynergy Repository. In this section, we will set up a new retention profile and purge records according to the profile record.

Note: These examples assume you have already logged in and have records that meet the retention profile criteria.

#### **Invoice Retention Profile**

This example describes an Invoice Retention profile that will allow the Accounting department to Simplify its Workplace by automatically removing all records that are over three years old.

1. Navigate to the iRetention Manager Toolbar and select Add New Profile.

Exit

Note: Alternatively, you may select File>Add Profile.



Note: The Retention Profile dialog displays.

2. Place the cursor in the Profile Name text box and Name the Retention Profile.

Retention Profile			
	Define the		
	Retention		
Profile Name Invoices 🔶	Profile name.		
ىرىيى بىرىيى بىرىيى بىرىيى بىرىيى بىرىيى 1931-يىلى بىرىيى بىر	أستني مترجع سنجب		

3. Select the Application drop down menu and **Choose** the appropriate **iSynergy Application**.

Retention Profile			
Profile Name	Invoices		
Choose the iSynergy Application.			
Application	Invoices	-	
Trigger Date	Checks GeneralCapture HR HR_Employee Vacations		
Index	Invoices Office Manager Payroll		
and the second second	and the second s		

4. Choose the Index Trigger Date.

Retention Profil	e	
	· · · · · · · · · · · · · · · · · · ·	ş
Profile Name	Invoices	ě
Application	Invoices 🔽	2
Application		5
Trigger Date		ł
S	elect the Index Trigger Date.	£
Index	CreateDate 🔽	
	ModifiedDate	2
<u> </u>	Date	ξ.
	Beneric and a start of the star	r

5. Define the Document Retention Number of Periods.

Retention Profile	e
Profile Name	Invoices
Application	Invoices
Trigger Date	
Index	CreateDate
Document F	letention

6. Select the **Retention Period**.

Retention Profile	5
Profile Name Invoices	
Application Invoices	
Trigger Date	and the second
Index CreateDate	100
Document Retention	
Number of Periods 3	1
Period Year T Day Month Year	

Note: The Retention Period is defined as a calendar day + 1.

7. Select the **Document Type Index**.

Retention Profile	
Profile Name Invoices	
Application Invoices	
Trigger Date	
Index CreateDate	
Document Retention	
Number of Periods 3	1
Period Year	
Document Type	
Index Status	
Status	الخمين

Note: These Document Type Indexes are derived from the defined iSynergy Application Document Types. For more information regarding iSynergy Document Types, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

8. Select the **Document Type Value**.

<b>Retention Profi</b>	e		1
Profile Name	Invoices		and the second
Application	Invoices	<b>-</b>	
Trigger Date			
Index	CreateDate	•	
Document Retention Number of Periods 3 🚊 Period Year 💌			
Document	Гуре		
Index	Status	•	
Value	Paid Pending Post Payment Approved New Invoices Bejected		
····	Payment Pending Paid	hcel	

Note: The Document Type Value is derived from the iSynergy Application UDLs. For more information regarding iSynergy UDLs, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

9. Select OK.

Noto	Selecting	Cancel	vill not sav	anv critoria	for the	Retention	Profile
note.	Selecting	Cancerv	viii not save	з ану спіена		Retertion	FIUIIIe.

Retention Profile	2	
Profile Name Application	Invoices	
Trigger Date	CreateDate	•
Document F	letention	
Document T	ype	
Value	Paid	
		Cancel

Note: The newly created Retention Manager profile displays in the iRetention Manger workspace.

📻 iRetention Manager								
File Action About								
New Retention Profile displays.								
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value 🛛 🤞			
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation			
Checks	Checks	CreateDate	5 Years		1			
🔲 Invoices 🥌	Invoices	CreateDate	3 Years	Status	Paid			
HR_Resume	HR	CreateDate	6 Months	Doc Туре	Resume 💲			
		all a small		م میں میں میں میں				

10. In the iRetention Manager workspace, Select the Invoices Retention Profile.

🖬 iRetention Manager								
File Action About	File Action About							
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value			
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation			
🗖 Checks	Checks	CreateDate	5 Years					
Invoices	Invoices	CreateDate	3 Years	Status	Paid			
HR_Resume	HB	CreateDate	6 Months	Doc Type	Resume			
Select the	Invoices Retention Pr	ofile.						

#### 11. Navigate to the **iRetention Manager Toolbar**.

12. Select Search Documents to Purge.

Note: Alternatively, you may select Action>Search Documents.

📷 iRetention Manager							
File Action About							
🖬 🖾 💥 😥 😺 🛞							
Profile Name	Application Search document	s to purge, ite					
HR_Employe	HR_Employee Vacations	CreateDate					
Checks	Checks	CreateDate 🛛 🐴					
Invoices	Invoices	CreateDate					
HR_Resume	HB	CreateDate 🚦					

Note: The iRetention Manager Workspace Status column displays the number of documents to be purged per the defined retention profile criteria.

🖪 iRetention Man	ager						
File Action About							
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status	
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation		
Checks	Checks	CreateDate	5 Years				
Invoices	Invoices	CreateDate	3 Years	Status	Paid 🚤	29 documents to purge. 1/20/2005 thru 1/20/2005	
HR_Resume	HB	CreateDate	6 Months	Doc Type	Resume 🛹		
المعيمة محمدهم			Letter and the second			and a second	

# 13. Navigate to the iRetention Manager Toolbar and select **Purge documents for checked profiles.**

Note: Alternatively, you may select Action>Purge Documents.

File Action About	
Purge documents for checked profile	

Note: A Purge Documents dialog displays.

14. If you are sure you want to purge the checked profiles, select Yes.

Purge Do	cuments 🛛 🕅
2	Are you sure you want to purge the checked profiles?
-	

Note: A Purge Confirmation dialog displays.

- 15. Select the **Checkbox** for "I have read the warning above and understand the implications of continuing."
- 16. Click Continue.

Purge Confirmation
You are about to permanently delete documents from iSynergy for the retention profiles listed below. Date ranges shown are inclusive and are based on a comparison between profile trigger date values and today's date (1/20/2009). There is no rollback or recovery. Purged items are permanently expunged from the system.
Profile Invoices has 29 documents to purge. CreateDate:1/20/2005 thru 1/20/2005 Retention Period is 3 Years.  1. Read the warning.  2. Select the checkbox.
3. Click Continue.
I have read the warning above and understand the implications of continuing. Continue Cancel

17. The selected records begin to be removed from the Repository and Database.

📪 iRetention Manager								
File Action About	File Action About							
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status		
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation			
Checks	Checks	CreateDate	5 Years					
Invoices	Invoices	CreateDate	3 Years	Status	Paid	Purged 14 of 29 documents.		
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume	1		
			and the second second	ميحمصي				

Note: If you need to stop the purge, navigate to the iRetention Manager Toolbar and select Stop. You may select Stop at any time.

📻 iRetention Manager							
File Action About	:						
📑 🖻 📡	\$ 🔊 词	<b>*</b>					
Profile Name	Application	Stop Search/Purge					

18. The Status column displays the purged number of records.

a iRetention Manager								
File Action About	File Action About							
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status		
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation			
Checks	Checks	CreateDate	5 Years					
Invoices	Invoices	CreateDate	3 Years	Status	Paid	Purged 29 documents.		
HR_Resume	HB	CreateDate	6 Months	Doc Type	Resume	1		
Landar	فيمنعن المعقومة معترين الم					and the second sec		

## **Checks Retention Profile**

This example describes a Checks Retention profile that will allow the Accounting department to Simplify its Workplace by automatically removing all records that are over five years old.

1. Navigate to the iRetention Manager Toolbar and select Add New Profile.

Note: Alternatively, you may select File>Add Profile.

📑 iR	etentia	n Mari
File	Action	About
A	dd Profile	Æ
∽~Ęg	dit Profile	

Note: The Retention Profile dialog displays.

2. Place the cursor in the Profile Name text box and Name the Retention Profile.

Retention Profile	2
Profile Name	Checks 🔶
	and and a second second second

3. Select the Application drop down menu and **Choose** the appropriate **iSynergy Application**.

Retention Profi	le
	1
Profile Name	Checks
Application	Checks 🔽
	Checks

4. Choose the Index Trigger Date.

Trigger Date	and the second
} Index	CreateDate
3	ModifiedDate
≺r∈Document R	Date

5. Define the Document Retention Number of Periods.

ζ	Number of Periods 5 🕂	
ister.	and the second s	ļ

6. Select the Retention Period.



Note: The Retention Period is defined as a calendar day + 1. Additionally, if you choose to have additional criteria defined, such as your Document Type and the Value, the options are dependent upon the iSynergy Application UDL setup. For more information regarding iSynergy Applications and UDLs, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

7. Select OK.

Retention Profile	
Profile Name Checks	
Application Checks	
Trigger Date	
Index CreateDate	
Document Retention Number of Periods 5	
Document Type	
Ok Cancel	

Note: Selecting Cancel will not save any criteria for the Retention Profile.

Note: The newly created Retention Manager profile displays in the iRetention Manger workspace.

8. In the iRetention Manager workspace, Select the Checks Retention Profile.

醹 iRetention Man	ager					
File Action About						1
<b>i</b>		Select th	e Checks Retent	tion Profile.		
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status
HB_Employe	<b>HR_Employee</b> Vacations	CreateDate	1 Year	HR Doc Type	Vacation	
Checks	Checks	CreateDate	5 Years			

- 9. Navigate to the iRetention Menu.
- 10. Select Action>Search Documents.



Note: Alternatively, you may select the Search Icon from the Toolbar.

📧 iRetention Man	ager					
File Action About						
🖪 🗁 💥	s 🔊 😼 😵	2				
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	
Checks	Checks	CreateDate	5 Years			32 documents to purge. 1/19/2003 thru 1/19/2003
الر — المراجع ا	المتحد ويحمد بالمحمد والمحمد والمتعالية	بمعمى مغض حمصا			A manage a managed and a second	أأصحبا والاحتماد مستجده فصيحته حمارية ومنهو صبيحا فيمعمن ويحتمد فترجع والمعاط

Note: The iRetention Manager Workspace Status column displays the number of documents to be purged per the defined retention profile criteria.

- 11. Navigate to the iRetention Manager Menu.
- 12. Select Action>Purge Documents.

Note: Alternatively, you may navigate to the iRetention Manager Toolbar and select Purge documents for checked profiles icon.

🖂 iR	etentio	n Manager	i.
File	Action	About	
	Sear	ch Documents	
	🕨 Purg	e Documents	3
ممرجد			

Note: A Purge Documents dialog displays.

13. If you are sure you want to purge the checked profiles, select Yes.



Note: A Purge Confirmation dialog displays.

- 14. Read the warning.
- 15. Select the **Checkbox** for "I have read the warning above and understand the implications of continuing."
- 16. Click Continue.



17. The selected records begin to be removed from the Repository and Database.

Note: If you need to stop the purge, navigate to the iRetention Manager Toolbar and select Stop. You may select Stop at any time.

📑 iRetention Man	ager					
File Action About						
	\$ 100 8 8	Stops	s the purge proc	ess.		
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	
Checks	Checks	CreateDate	5 Years		-	Purged 13 of 32 documents.

18. The Status column displays the purged number of records.

🖪 iRetention Man	ager					
File Action About	:					
		2				
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	
Checks	Checks	CreateDate	5 Years		->	Purged 32 documents.
V. Independent of some of a	المرير فالمرير فعامر فعامرتهم وسالته فرياسه	مسرورون ومنصحته	ممصف بمبيد فالعام	more season and	Los on a second second	الاسليم متحمد فتحام متفي محصم وحصاء مصادحت فالتحد ومتحس وتمار

#### **HR Retention Profile**

This example describes a HR\_Vacation Retention profile that will allow the HR department to simplify its workplace by automatically removing all Vacation Requests records that are a year old, and another HR\_Resume profile that will allow the HR department to purge received resumes that are over six months old.

#### **Employee Vacation Profile**

1. Navigate to the iRetention Manager Toolbar and select Add New Profile.

Note: Alternatively, you may select File>Add Profile.

Note: The Retention Profile dialog displays.

- 2. Place the cursor in the Profile Name text box and Name the Retention Profile.
- 3. Select the Application drop down menu and Choose the appropriate iSynergy Application.

- 4. Choose the **Index Trigger Date**.
- 5. Define the Document Retention Number of Periods.
- 6. Select the **Retention Period**.

Note: The Retention Period is defined as a calendar day + 1.

#### 7. Select the Document Type Index.

Note: These Document Type Indexes are derived from the defined iSynergy Application Document Types. For more information regarding iSynergy Document Types, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

#### 8. Select the **Document Type Value**.

Note: The Document Type Value is derived from the iSynergy Application UDLs. For more information regarding iSynergy UDLs, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

9. Select OK.

Note: Selecting Cancel will not save any criteria for the Retention Profile.

Retention Profile
Profile Name HR_Employee Vacations
Application HR_Employee Vacations
Trigger Date
Index CreateDate
Document Retention
Number of Periods 1
Period Year 💌
Document Type
Index HR Doc Type
Value Vacation
Ok Cancel

Note: The newly created HR\_Employee Vacations Retention Manager profile displays in the iRetention Manger workspace.

10. In the iRetention Manager workspace, **Select the HR\_Employee Vacations Retention Profile**.

🖀 iRetention Manager									
File Action About									
Select the HR_Employee Vacations Retention Profile.									
Profile Name Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status				
HR Employe HR Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation					

- 11. Navigate to the **iRetention Manager Toolbar**.
- 12. Select Search Documents to Purge.

Note: Alternatively, you may select Action>Search Documents.

File Action About								
Profile Name Applics Search documents to purge. Date Retention Period Doc Type Doc Type Value Status								
HR_Employe HR_Employee Vacations CreateDate 1 Year HR Doc Type Vacation								

Note: The iRetention Manager Workspace Status column displays the number of documents to be purged per the defined retention profile criteria.

📑 iRetention Man	ager						_	
File Action About	:							
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status 🎽		
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	15 documents to pu	rge. 1/19/2007 thru 1/19/2007	
فيرجيهم ومحكم والانتقاد المتعاد مع	and a second sec	an many		مستعر بمناه ومنتقر المستعام والم	and a second second second	- BAWA MONT - AND	الحصر بالحرير فالمحافظ فرق فالمحافظ	a second

13. Navigate to the iRetention Manager Toolbar and select **Purge documents for checked profiles.** 

Note: Alternatively, you may select Action>Purge Documents.

📻 iRetention Manager			
File Action About			
Profile Name Application Purge documents for checked profiles. Ition Period	Doc Type	Doc Type Value	Status
HR_Employe HR_Employee Vacations CreateDate 1 Year	HR Doc Type	Vacation	15 documents to purge. 1/19/2007 thru 1/19/2007
اللارجية والمراجع أرجعت والمراجع	مرجعه ومعاد والمحاصر والمحاصر والمحاص	بمغفى فاصف ستعريز المحريات سأ	الأسطيني فتصفيحت فتنا فالتفسيصفية يستبيها فتتصار فكلتكم فمريتهم

Note: A Purge Documents dialog displays.

14. If you are sure you want to purge the checked profiles, select **Yes**.



Note: A Purge Confirmation dialog displays.

- 15. Read the warning.
- 16. Select the **Checkbox** for "I have read the warning above and understand the implications of continuing."
- 17. Click Continue.



18. The selected records begin to be removed from the Repository and Database.

Note: If you need to stop the purge, navigate to the iRetention Manager Toolbar and select Stop. You may select Stop at any time.



Note: To start purging documents again, simply start over with step 10 and continue forward.

📑 iRetention Man	ager						_1	
File Action About							1	
Pr <b>ofi</b> e Name	Application	o purge. Trigger Date	Retention Period	Doc Type	Doc Type Value	Status		
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 10 of 15 documents.	stopped by user.	
📻 iRetention Man	ager							
File Action About								
Profile Name	Application Purge docu	ments for checked	profiles, n Period	Doc Type	Doc Type Value	Status	1	
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	5 documents to purge. 1/19/20	07 thru 1/19/2007	

19. The Status column displays the purged number of records.

📻 iRetention Manager									
File Action About									
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status			
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.			
the state of the second states	Landson and the second s	ine and share	the Charles and a subject of the	and the second	and the second se	and the second state of th			

#### Potential Employee Resume Profile

1. Navigate to the iRetention Manager Toolbar and select Add New Profile.

Note: Alternatively, you may select File>Add Profile.

Note: The Retention Profile dialog displays.

- 2. Place the cursor in the Profile Name text box and Name the Retention Profile.
- 3. Select the Application drop down menu and Choose the appropriate iSynergy Application.
- 4. Choose the **Index Trigger Date**.
- 5. Define the Document Retention Number of Periods.
- 6. Select the **Retention Period**.

Note: The Retention Period is defined as a calendar day + 1.

7. Select the **Document Type Index**.

Note: These Document Type Indexes are derived from the defined iSynergy Application Document Types. For more information regarding iSynergy Document Types, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

8. Select the Document Type Value.

Note: The Document Type Value is derived from the iSynergy Application UDLs. For more information regarding iSynergy UDLs, please refer to the iSynergy 3.9 SP1 Advanced User Manual.

9. Select OK.

Retention Profile
Profile Name HR_Resume
Application HR
Trigger Date
Index CreateDate
Document Retention
Number of Periods 6
Period Month
Document Type
Index Doc Type
Value Resume
Ok Cancel

Note: Selecting Cancel will not save any criteria for the Retention Profile.

Note: The newly created Retention Manager profile displays in the iRetention Manager workspace.

- 10. In the iRetention Manager workspace, **Select the HR\_Resume Retention Profile**.
- 11. Navigate to the **iRetention Manager Toolbar**.
- 12. Select Search Documents to Purge.

Note: Alternatively, you may select Action>Search Documents.

🔜 iRetention Man	ader								
File Action About									
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status			
HR_Employe	HR_cmployee vacations	rge. CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.			
Checks	Checks	CreateDate	5 Years			Purged 32 documents.			
Invoices	Invoices	CreateDate	3 Years	Status	Paid				
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume				
La Remer	and the second s	and the second				and a second second second			

Note: The iRetention Manager Workspace Status column displays the number of documents to be purged per the defined retention profile criteria.

📑 iRetention Man	ager									
File Action About										
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status				
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.				
Checks	Checks	CreateDate	5 Years			Purged 32 documents.				
Invoices	Invoices	CreateDate	3 Years	Status	Paid					
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume 🚽	20 documents to purge. 1/19/2007 thru 1/19/2007				
والمريحة المحمد المحمد والمريحة المراجع	Lawrence March			Same Care	and a second second second	أأسيلي بالرياسي ويحتبدون فالتعاد فتحد فالتعا فالتعا فتعتب والرياس				

13. Navigate to the iRetention Manager Toolbar and select **Purge documents for checked profiles.** 

Note: Alternatively, you may select Action>Purge Documents.

📑 iRetention Man	ager								
File Action About									
Profile Name	Application Purge docum	ents for checked	profiles.	Doc Type	Doc Type Value	Status			
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.			
Checks	Checks	CreateDate	5 Years			Purged 32 documents.			
Invoices	Invoices	CreateDate	3 Years	Status	Paid				
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume	20 documents to purge. 1/19/2007 thru 1/19/2007			
	and and the second s			متحميت با		and a second sec			

Note: A Purge Documents dialog displays.

14. If you are sure you want to purge the checked profiles, select **Yes**.

Purge Do	cuments 🛛 🕅
2	Are you sure you want to purge the checked profiles?
-	

Note: A Purge Confirmation dialog displays.

15. Read the warning.

- 16. Select the **Checkbox** for "I have read the warning above and understand the implications of continuing."
- 17. Click Continue.



18. The selected records begin to be removed from the Repository.

Note: If you need to stop the purge, navigate to the iRetention Manager Toolbar and select Stop. Consequently, you may select Stop at any time.

19. The Status column displays the purged number of records.

📻 iRetention Manager									
File Action About									
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc Type Value	Status			
HR_Employe	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.			
Checks	Checks	CreateDate	5 Years			Purged 32 documents.			
Invoices	Invoices	CreateDate	3 Years	Status	Paid 🎽 🎽				
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume	Purged 20 documents.			
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# **iRetention Manager Tips & Tricks**

This section has been provided to further Simplify the Workplace and empowers the Administrator when using iRetention Manager.

✓ When defining a new iRetention Profile, you may not use an existing iRetention Profile name.

Retention Profile	
Profile Name HR_Employee Vacations	
Application	me already exists.

✓ The iRetention Manager Interface columns are customizable and you may select the column dividers to change the spacing layout.

露 iRetention Manager						
File Action About						
All columns are customizable.						
Profile Name	Application	Trigger Date	Retention Period	Doc Type	Doc T	Status
HR_Employee Vacations	HR_Employee Vacations	CreateDate	1 Year	HR Doc Type	Vacation	Purged 5 documents.
Checks	Checks	CreateDate	5 Years			Purged 32 documents.
Invoices	Invoices	CreateDate	3 Years	Status	Paid	
HR_Resume	HR	CreateDate	6 Months	Doc Type	Resume	Purged 20 documents.
and the second						

✓ If you stop the purge process for a Retention profile, you will have to start the search over again before the purge can continue.

Documen	it Search Required 🛛 🔀			
Profile HR_Employee Vacations requires a search to be done prior to a purge. Selecting 'Ok' will not purge documents for this profile and continue with other checked profil Selecting 'Cancel' will cancel all purges.				
	Cancel			

- ✓ iRetention Manager will support creating multiple retention profiles for one or more servers. All retention profiles for one or more servers will be saved in a single XML file.
- ✓ The retention profiles that load initially are based on whatever server is defined in the login dialog.
- ✓ iRetention Manager must be ran on a single machine where the XML file resides.
- ✓ When creating a Retention profile, the document type and value are optional fields. However, if these values are not selected, all documents that meet the defined criteria trigger date will be purged.
- ✓ You may select multiple profiles, search for documents to purge and purge all the checked retention profiles at the same time.

Note: You may also select a profile and choose the keyboard delete key to purge documents.

✓ When purging documents from a selected Retention Profile, you must select the "I have read the warning above and understand the implications of continuing" before you will be able to continue the purge process.

Note: The purged documents are irretrievable in the current system and can only be recovered through a backup.

✓ To view a detailed text history of the documents you have purged by profile, navigate to C:\Program Files\iDatix\iRetention Manager\Detail.

ar C:\Program Files\iDatix\iRetentionManager\Detail						
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	Elle Edit View Favorites Iools Help					
🕒 Back 🔹 🕥 👻 🏂 🔎 Search 🌔 Folders		<b></b>				
Address C:\Program Files\iDatix\iRetentionMan	age	r\Detail				
Folders	×	Name 🔺	Size	Туре		
🗁 Data Evchange Service		esx5-w2k3-amy_Checks_2_2009_1_20_15_39_17.txt	8 KB	Text Document		
Database		esx5-w2k3-amy_HR_Employee Vacations_4_2009_1_16_14_30_50.txt	1 KB	Text Document		
T CocumentServer		esx5-w2k3-amy_HR_Employee Vacations_4_2009_1_21_7_45_5.txt	3 KB	Text Document		
Eul Taxt		esx5-w2k3-amy_HR_Employee Vacations_4_2009_1_21_7_58_38.txt	2 KB	Text Document		
📥 Full Text Manager		esx5-w2k3-amy_HR_Resume_3_2009_1_21_8_27_15.txt	5 KB	Text Document		
tai rext hanager (□) i∆lerts	1	E esx5-w2k3-amy_Invoices_5_2009_1_20_14_0_38.txt	7 KB	Text Document		
E 🔁 initia	1					
🔂 iScap						
		and the second s				

Note: iRetention Manager automatically generates a continuous summary log file detailing the date, time, retention profile criteria and the number of records purged. The text files contain all the index values for each deleted document within a selected iSynergy Application. The first record in the text file contains the column names of the index values. The remaining records contain the index values enclosed in quoted and delimited by commas. This allows the user to import a text file into a spreadsheet if desired. The text file naming convention is: Server\_Profile Name\_App ID\_DateTime.txt

sx5-w2k3-amy_HR_Employee Vacations_4_2009_1_21_7_45_5.txt - Notepad	×
Elle Edit Format View Help	
["objectID", "PointerToSource", "Status", "Pages", "Locked", "ArchiveStatus", "CreatedBy", "CreateDate", "ModifiedBy", "ModifiedDate", "BatchID", "	
[IDX_Name", "IDX_SSN", "IDX_HR_DOC_Type", "IDX_Employee_Supervisor", "IDX_Vacation_Status"	
"13","\\ESX5-w2K3-AMY\Repository\HR_Employee Vacations\_obj_4_D1\_obj_4_D1_013R1.doc","E","0","","sysadmin","1/19/2007 12:00:00	5
HAM"."sysadmin"."1/16/2009 12:00:00 AM"."1044"."Noah shane"."555-55-555"."vacation"."Caroline Elizabeth"."Denied"	1.1
15°. "\\ESX5-w2κ3-AMY\Repositor\\HR Employee Vacations\ obi 4 D1\ obi 4 D1 015R1.doć"."E"."O".""."Sysadmin"."1/19/2007 12:00:00	1
AM", "sysadmin", "1/16/2009 7:44:23 AM", "1046", "Stella Faith", "111–111–1111", "Vacation", "Caroline Flizabeth", "Denied"	1
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MM" "systemin" "1/16/2009 7:45:20 MM" "1047" "Noah Shane" "555-55-555" "Vacation" "Caroline Elizabeth" "Carcelled"	1.1
"18" (\LESY5-w2K3-MWX) Benository \HP Employee Vacations\ obi 4 p1\ obi 4 p1 01801 doc" "E" "0" """ "sysadmin" "1/19/2007 12:00:00	
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AM, Sysaomin, 1/16/2009 7:52:12 AM, 1055, Stella Faith, III-II-IIII, Vacation, Caroline Elizabeth, Approved	1
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AM", "sysadmin", "1/16/2009 10:56:07 AM", "1056", "Noah Shane", "555-55-5555", "Vacation", "Caroline Elizabeth", "Denied"	
"26","\\ESX5-W2K3-AMY\Repository\HR_Employee_Vacations\_00j_4_D1\_00j_4_D1_026R1.doc","E","0","","sysadmin","1/19/2007 12:00:00	1.2
AM", "sysadmin", "1/16/2009 10:57:16 AM", "1057", "Noah Shane", "555-55-555", "Vacation", "Caroline Elizabeth", "Approved"	2
"27","\\ESX5-w2K3-AMY\Repository\HR_Employee Vacations\_obj_4_D1\_obj_4_D1_027.doc","E","0","","sysadmin","1/19/2007 12:00:00	
AM","sysadmin","1/16/2009 10:57:53 AM","1058","stella Faith","111–11–111","vacation","Caroline Elizabeth","Denied"	
"29","\\ESX5-w2K3-AMY\Repository\HR_Employee Vacations\_obj_4_D1\_obj_4_D1_029.doc","E","0","","sysadmin","1/19/2007 12:00:00	1
AM","sysadmin","1/19/2009 1:43:48 PM","1060","stella Bella","888-88-8888","Vacation","Caroline Elizabeth","Denied"	
	- and

- ✓ Using a trigger date and retention period as purge criteria, the following formula will be used when determining when a document should be purged.
  - Purge document if current date>Retention Date.
  - Trigger Date + Retention Period = Retention Date.
  - If adding a month or year period to a trigger date results in the retention date having a day that is larger than the maximum day for the retention date month, the day is adjusted to the maximum days in the retention date month.

Trigger Date	Period	Retention Date	Purge on or after
01/02/2007	+ 30 Days	02/01/2007	02/02/2007
01/30/2007	+ 1 Month	02/28/2007	03/01/2007

01/30/2007	+ 2 Months	03/30/2007	03/31/2007
01/30/2007	+ 2 Years	01/30/2009	01/31/2009
01/28/2007	+1 Month	02/28/2007	03/01/2007
01/28/2008	+ 1 Month	02/28/2008	02/29/2008
01/30/2008	+ 1 Month	02/29/2008	03/01/2008
02/29/2008	+ 1 Year	02/28/2009	03/01/2009
02/28/2008	+ 4 Years	02/28/2012	02/29/2012
02/29/2008	+ 4 Years	02/29/2012	03/01/2012