FOIAXpress popexus

Retention Module



FX 11.7.0 Retention Module

Notice of Rights

Copyright © 2024, AINS, LLC d/b/a OPEXUS. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language, in any form or by any means, electronic, mechanical, photocopying, recording, or otherwise, without prior written permission of the publisher: AINS, LLC. For information on obtaining permission for reprints and excerpts, contact info@opexustech.com.

Additionally, all copyrights, confidential information, patents, design rights and all other intellectual property rights of whatsoever nature contained herein are, and shall remain, the sole and exclusive property of the publisher.

Notice of Liability

The information in this publication is believed to be accurate and reliable. However, the information is distributed by the publisher (AINS, LLC.) on an "As Is" basis without warranty for its use, or for any infringements of patents or other rights of third parties resulting from its use.

While every precaution has been taken in the preparation of this publication, neither the author (or authors) nor the publisher will have any liability to any person or entity with respect to any loss or damage caused or alleged to be caused, directly or indirectly, by the information contained in this publication or by the computer software and hardware products described in it.

Notice of Trademarks

The publisher's company name, company logo, company patents, and company proprietary products are trademarks or registered trademarks of the publisher: AINS, LLC. All other trademarks or registered trademarks are the property of their respective owners.

Non-Disclosure Statement

This document's contents are confidential and proprietary to AINS, LLC. This document cannot be released publicly or outside the purchasing agency without prior written permission from AINS, LLC.

Images in this manual are used as examples and may contain data and versioning that may not be consistent with your version of the application or information in your environment.

Additional Notice

Information in this documentation is subject to change without notice and does not represent a commitment on the part of AINS, LLC.

Notwithstanding any of the foregoing, if this document was produced as a Deliverable or other work for hire under a contract on behalf of a U.S. Government end user, the terms and conditions of that contract shall apply in the event of a conflict.

Contents

1	Ret	tention Module	4
	1.1	How Retention Works	4
	1.2	Accessing Retention Management	4
2	Ret	tention Policies	6
3	Ma	rk for Action	8
4	Ар	ply Retention Action	10
5	Ret	tention Management Actions Report	14

1 Retention Module

The FOIAXpress Retention Module allows Administrators to create policies for retaining system data, with gateways to mark Requests for retention and apply retention action, ensuring Requests are managed according to your unique organizational requirements.

Here we'll provide a quick look at how the retention module works, including:

- The retention process
- Creating Retention Policies
- Marking Requests for action
- Applying retention actions
- The Retention Management Actions Report

1.1 How Retention Works

FOIAXpress Administrators manage the retention process. Retention management in FX follows these basic steps:

- 1. Administrators create a Retention Policy for a specific Request Type, which determines how long Requests of that type should be retained, as well as the disposition to be applied after the retention period.
- 2. Requests are marked for action, using search and filtering options to locate specific Requests, with the ability to mark for action in batches if needed.
- 3. Retention Actions are applied to Requests marked for action, with options to Delete, Archive, and Restore Requests.
- 4. All retention actions are captured and reportable on the Retention Management Actions Report.

1.2 Accessing Retention Management

You can access the Retention management options from the Administration section.

Click (**A**) **Administration**, then from the left navigation select (**B**) **Retention Module**. The (**C**) *Retention* options display:

Retention Module

Home Requesters - Requests	- Document Managem	Admin	istration Reports	Request #
Home >> Administration				
System Configuration	Retention			
System Administration	 Mark for Action 	C	S Retention Management	Actions Report
Dashboards	G Apply Retention Action		G Retention Policies	
Security				
Organization Setup				
Collaboration Room				
Lookups				
Request Management				
Document Management				
Retention Module				
Jobs				

Options are Mark for Action, Apply Retention Action, Retention Policies and Retention Management Action Report. See the steps in the following sections for details on each.

2 Retention Policies

The first step in the Retention process is to establish a Retention Policy. Follow the steps below to create an active Retention Policy.

1. Navigate to Administration > Retention Module > Retention Policies. The Retention Policies screen appears:

Retention Policies						_ x _
New Refresh Edit Delete	Close					
Retention Policy	Description	Active	Retain for Months	Wait until Fiscal Year Ends	Created By	Created Date
1 Month Policy (FYNoE)	1 Month_Policy (FYNoE)	Yes	1	No	Marada, Dharm	08/22/2017
2 Months Policy (FYE)	1 Month_Policy (FYE)	Yes	2	Yes	Marada, Dharm	08/22/2017
3 Months Policy (FYNoE)	3 Months_Policy (FYNoE)	Yes	3	No	Marada, Dharm	08/22/2017
<u>3Y3M</u>		Yes	39	No	Abbas, Firoz	10/05/2017
<u>3Y3M(Wait)</u>		Yes	39	Yes	Abbas, Firoz	10/05/2017
Archieve witout waiting FY		Yes	1	No	Verma, Vishnu	09/21/2017

2. Existing policies are listed on this page. Click **New** to create a new Retention Policy. The *New Retention Policy* screen appears as shown below:

Rev Retention Policy
Retention Policy Details
Policy Name* :
Active : 🔽
Wait Until Fiscal Year Ends : 🔽
Retain For* : 0 • Year(s) 0 • Month(s)
Description :
Disposition* : Destroy
Spell Check01 Save Cancel
Note: Paths are with respect to the web server.
Archive location should be accessible for the AppPool account of FOIAXpress application and also
AppPool Account should have FULL Control permissions.
Note: * fields are mandatory

- 3. Add a description Policy Name.
- 4. For this example, ensure the *Active* checkbox is selected.
- 5. Use the *Retain For* drop downs to select the number of **Years** and **Months** to retain requests under this policy.

- 6. Use the *Disposition* drop down to select either **Destroy** or **Archive**. *Archiving* requests saves the Request Report, which is archived to the same server where the FX application is maintained.
- 7. Click **Save** to save the policy.
- 8. The new policy is now Active. It is available in the *Retention Policies* list for editing and can also be deleted from this list.

3 Mark for Action

Retention management allows for multiple layers of review and approval before Requests are destroyed or archived. The first gateway is to mark Requests for action. Requests captured by this policy can be reviewed before the retention action is manually applied.

Only *Closed* requests with an assigned retention policy can be marked for action.

Follow the steps below to review Requests within retention policy and mark these for action.

1. Navigate to Administration > Retention Module > Retention Policies. The Requests View (Mark for Action) screen appears:

🚍 Requests Vie	v [Mark For Action]	a ×
Requests		Wild card searches (*) are supported
Search Crite	ria 🚺	
Re	quest # : *	Action Office :
Reque	st Type : All	Request Status : Closed
Re	quester : 📰 📉 📄 Include On Bel	nalf Of Request Owner :
Des	ription : *	? 🔲 Search in Sub Requests
⁻ Advanced	B	
AND	Field Operator	Value
× AND	Retention Date	
× AND	Retention Expiry Days	
× AND	RM Disposition Type	▼ All ▼
× AND	RM Status	▼ All ▼
Add new filte	[
+ Custom F	elds	Custom Fields that are common across the selected Request Types are displayed
		Search Clear Close
		▼

- 2. Use the (A) Search Criteria fields to locate specific requests using the request details.
- 3. Alternatively, use the (**B**) *Advanced* options to locate Requests using additional details, including using Retention details, such as the retention date, expiration days and more. These can be combined to narrow down to highly specific results.
- 4. Click **Search** to locate Requests matching your search criteria. All matching Requests are listed in the *Requests View (Search)* list:

Custom Fields that are common across the selected Request Types are displayed Search Clear Close										
Mark for Action View Request Details Amend Expiry Date Export Archive Requests View [Search]										
	Request #	Request Type	Requester	Organization	Primary User	Expired Date	Closed Date	Expired Days	Disposition Type	RM Status
	2018-FOIA-00017	FOIA/PA	A, QAMA		M, Ambica	07/09/2019	08/27/2018	310	Destroy	Ready for Deleti
	2018-LIT-00037	Litigation	Mekala, Ambica		Admin, Admin	09/30/2019	08/23/2018	227	Archive	Archived
	2018-APP-HQ	Appeal	Mekala, Ambica		Admin, Admin	07/09/2019	08/23/2018	310	Archive	Ready for Archi
ĸ	1)) Pa	age Size 20 🔻								3 items in 1 pages
	Mark for Action Mark All for Action View Request Details Amend Expiry Date Export Archive Print Print All									

5. You can select Requests from this list and **View Request Details**, **Amend Expiry Date**, **Archive** and more. In this example, we'll opt to **Mark for Action**. The *Mark for Action* screen appears:

Mark for Action		x
Mark for Action		
Mark for Action Date* : 5/14/2020		
Comments :		
	Attach File	7
Approval Copy :		
	Add from Scan	
	Spell Check Mark for Action Cance	
Note: * fields are mandatory		

- 6. The *Mark for Action Date* defaults to today's date. There are also fields for adding *Comments* and adding an *Approval Copy*. When complete, click **Mark for Action**.
- 7. The Request is now marked for action, with the ability to apply retention actions to the Request. See the next section for steps.

4 Apply Retention Action

The third step in the Retention process is to apply the approved retention action. Follow the steps below to apply retention actions to applicable Requests.

1. Navigate to Administration > Retention Module > Apply Retention Action. The Apply Retention Action screen appears:

Requests View [Apply Retention]			□ X
Requests			Wild card searches (*) are supported
Search Criteria		Action Office	
Request Type - All		Request Status : Clocod	
Requester :	nclude On Behalf Of	Request Owner :	
Description :		?	Search in Sub Requests
Advanced B			
AND Field	Operator	Value	
X AND Deletion Days	= •		
X AND Marked Date	= •		
X AND RM Disposition Type	= •	All	
X AND RM Status	= •	All	
Add new filter			
+ Custom Fields		Custom Fields that are com	mon across the selected Request Types are displayed
			Search Clear Close

- 2. Use the (A) Search Criteria fields to locate specific requests using the request details.
- 3. Alternatively, use the (**B**) *Advanced* options to locate Requests using additional details, including using Retention details, such as the deletion date, marked date, disposition type, and more. These can be combined to narrow down to highly specific results.
- 4. Click **Search** to locate Requests matching your search criteria. All matching Requests are listed in the *Requests View (Search)* list:

Reque	ests View [Search]									
	A equest #	Request Type	Requester	Organization	Primary User	Expired Date	Marked Date	Deletion Days	Disposition Type	RM Status
	FOIA-00017	FOIA/PA	A, QAMA		M, Ambica	07/09/2019	05/14/2020	6	Destroy	Ready for Deleti
	2018-FOI-HQ-0	FOIA	Request, New		Milbourne, Mar	11/29/2018	01/07/2019	499	Destroy	Ready for Deleti
	2018-LIT-00036	Litigation	Mekala, Ambica		Admin, Admin	09/24/2018	01/07/2019	499	Destroy	Ready for Deleti
	2018-FOI-HQ Te	FOIA	Edward, Mark	AIS LLC	M, Ambica	10/22/2018	01/07/2019	499	Destroy	Ready for Deleti
	2017-CON-00042	Consultation	Mills, Kyle		Indraganti, Sree	09/30/2016	01/07/2019	499	Archive	Ready for Archi
	2017-CON-00041	Consultation	Mills, Kyle		Indraganti, Sree	11/30/2017	12/18/2017	884	Destroy	Ready for Deleti
	2017-RT-00001/	RA Request	Watson, Sophie		Admin, Admin	09/25/2017	01/07/2019	499	Destroy	Ready for Deleti
	2017-FOI-00038	FOIA	Krusinger, Rebe	AINS	Krusinger, Becca	10/02/2017	01/07/2019	499	Destroy	Ready for Deleti
M	1 2 ▶ ►	Page Size 20	•						:	22 items in 2 pages
				E	B Delete	Delete All Vi	ew Request Details	Restore	rchive Details	Print Print All

5. Use the (A) Checkbox to select Request(s) to apply Retention Actions. The (B) *Retention Actions* are described below:

Retention Action	Description
Delete	Delete the selected Request. After clicking Delete, the Delete screen appears as shown below. Provide Comments (these are required). Optionally, click the checkbox to delete all documents associated with the request. Click Delete to commit the delete action.
Delete All	Delete ALL requests matching the search results (even if the request is not checked). The same <i>Delete</i> screen appears for adding comments, which are required.
View Request Details	View a limited version of the Request Details, as shown below:

Retention Action	Description
Restore	Restore the Request to the previous status. The following screen appears for providing <i>Comments</i> (these are required). Click Restore to commit the restore action.
Archive Details	View archive details for the selected Request. The Archive Details screen appears with all archive records listed. Select an archive detail item and click View Details to view the item details:

Apply Retention Action

Retention Action	Descriptio	n								
Print/Print All	Click Print below. Use	to o e Prir	utput the searc It All to print re	h res esults	ults in from a	a tak all pa	ole fo ges.	orma [.]	t, as s	hown
	Print Close									
	Provent é	Request Tune	Requestes	Opposization	Oning and Lines	Engineed Date	Marked Date	Deletion Dave	Dispersition Trees	PM Status
	2018-F01A-00017	FOLA/PA	A. DAMA	organization	M. Ambica	07/09/2019	05/14/2020	6	Destroy	Ready for Deletion
	1018-501-00-00156	601A	Present New		Miller real Manual	11/20/2010	01/07/2018	100	Destroy	Ready for Colation
	1018-117-00026	Literation	Malada Ambira		Adepia Adepia	09/24/2019	01/07/2019	199	Destroy	Ready for Deletion
	2018-E01-MO Testing-00150	fota	Edward, Mark	ATR LLC	M. Amhira	10/22/2018	01/07/2019	499	Destroy	Baady for Delation
	2018-8755-00007	New RTSS	nariur, nater		Y. Abbila	12/12/2017	01/07/2019	499	Archive	archived
	2018-RT55-00004	New RTSS	Berlify, M		X Abbila	09/30/2018	01/07/2019	499	Archive	Ready for Archiving
	2018-FOI-Dash AO-00107	FOLA	parker. Tony	-	Apanval, Riva	04/17/2018	01/07/2019	499	Destroy	Ready for Deletion
	2018-APP-Dash AO-AY-00015	Acces	stark, paul		Y Akhila	24/44/2040	01/07/2019	199		Ready for Deletion
	2040 X8 40 4000004	damaged Diff.				01/11/2010			Destroy	Presidy for Derectors
	2010-1A AU- AU00001	- Contraction	Marsh, Mitchell	CA	Y, Akhila	12/18/2017	01/07/2019	499	Destroy	Ready for Deletion
	2018-F01-HQ Testing-00073	FOIA	Marsh, Mitchell Beth, laura	CA AIS INC	Y, Akhila M, Ambica	01/11/2018 12/18/2017 03/02/2018	01/07/2019 01/07/2019	499	Destroy Destroy	Ready for Deletion Ready for Deletion
	2018-F01-HQ Testing-00073 2018-F01-HQ Testing-00073 2018-LIT-00021	FOTA Litigation	Marsh, Mitchell Beth, laura In response to this requi, In response to this requi	CA AIS INC	Y, Akhila M. Ambica Y, Akhila	12/18/2017 03/02/2018 10/01/2018	01/07/2019 01/07/2019 01/07/2019	499 499 499	Destroy Destroy Destroy Archive	Ready for Deletion Ready for Deletion Ready for Archiving
	2018-F01-HQ Testing-00073 2018-F01-HQ Testing-00073 2018-LIT-00021 2018-APP-MARAD OCOD-DM-00005	FOTA Litigation Appeal	Marsh, Mitchell Beth, Iaura In response to this requi. In response to this requi Kyle, Mills	CA AIS INC MJK ORG	Y, Akhila M, Ambica Y, Akhila Admin, Admin	12/18/2017 03/02/2018 10/01/2018 12/28/2017	01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499	Destroy Destroy Archive Destroy	Ready for Deletion Ready for Deletion Ready for Archiving Ready for Deletion
	2013-1A MC- ROOMO Testing-00073 2018-117-00021 2018-147-00021 2018-APP-MARAD 0C0D-DM-00005 2018-APP-MARAD 0C0D-DM-00003	FOTA FOTA Utigation Appeal Appeal	Narsh, Mitchell Beth, Iaura In response to this requi In response to this requi Kyle, Mils Cyle, Mils	CA AIS INC NJK ORG NJK ORG	Y, Akhila M, Ambica Y, Akhila Admin, Admin Admin, Admin	0/11/2018 12/18/2017 03/02/2018 10/01/2018 12/28/2017 12/28/2017	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499	Destroy Destroy Archive Destroy Destroy	Rady for Deletion Ready for Deletion Ready for Archiving Ready for Deletion Ready for Deletion
	2018-14 AG- A008001 2018-100-HQT setting-00073 2018-11T-00021 2018-APP-MARAD 0C0D-DM-00005 2018-APP-MARAD 0C0D-DM-00003 2018-F01-AD 55 Code-00057	FOTA Litigation Appeal Appeal FOTA	Nanh, Mitchell berh, laura In response to this requi Kyle, Mils Root, Jonathan	CA AIS INC MJK ORG MJK ORG Ains	Y, Akhila M, Ambica Y, Akhila Admin, Admin Admin, Admin Admin, Admin Y, Akhila	02/11/2018 12/18/2017 03/02/2018 10/01/2018 12/28/2017 12/28/2017 12/28/2017 09/30/2018	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499	Destroy Destroy Archive Destroy Destroy Destroy	Ready for Deletion Ready for Deletion Ready for Deletion Ready for Archiving Ready for Deletion Ready for Deletion Ready for Deletion
	018-14 AD- A000007 1018-117-00021 2018-117-00021 2018-AP-MARAD 0C0D-DN-00005 2018-AP-MARAD 0C0D-DN-00003 2018-AP-140-55 Cod-00037 2017-RTI-00003	FOIA FOIA Appeal FOIA Request1	Namb, Nitchell Barb, Jayra In response to this requi- kyle. Mils Kyle. Mils Rott. Jonathan Rotchell, Sartner	CA AIS INC MJK ORG MJK ORG Ains SJM ORG	Y, Akhila M, Ambiça Y, Akhila Admin, Admin Admin, Admin Y, Akhila Admin, Admin	01/11/2018 12/18/2017 03/02/2018 10/01/2018 12/28/2017 12/28/2017 09/30/2018 10/01/2018 10/01/2018	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499 499 499	Destroy Destroy Archive Destroy Destroy Destroy Destroy	Rady for Deletion Rady for Deletion Rady for Archiving Rady for Archiving Rady for Deletion Rady for Deletion Rady for Deletion Rady for Deletion
	0013*1.mD/000000 0018-1001+00 Testime-00073 0018-LT*00210 0018-AMARAD 0000-004-00005 0018-AMARAD 0000-004-00005 0018-104-05 55 004-00057 0019-TC1-00000 0019-TC1-00000 0019-TC1-00000 0019-TC1-00000	Popular NA FotA Litigation Appeal FotA Request1 FotA Request1 FotA	Marsh, Mitchail Britegorias to this regul. (In response to this regul Krige, Mills Krige, Mills Krige, Mills Mitchell, Santher Mitchell, Santher	CA AIS INC NIX ORG MIX ORG Ains SIM ORG MIX ORG	Y, Akhila M. Ambica Y, Akhila Admin, Admin Admin, Admin Y, Akhila Admin, Admin Indraganti, Sreekanth Indraganti, Sreekanth	07/11/2018 12/18/2017 03/02/2018 10/01/2018 12/28/2017 12/28/2017 09/30/2018 10/01/2018 10/01/2018	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499 499 499 499	Destroy Destroy Destroy Archive Destroy Destroy Destroy Destroy Destroy Sestroy Sestroy Sestroy Sestroy	aday for Oxistion Raady for Oxistion
	018*14.00.400001 0218*100:40_1*etimp=0073 0218-LT*00021 0218-AB*NARAD_OCCD-0H=00005 0218-AB*NARAD_OCCD-0H=00003 0218*10-005 Code-00007 0217*RT=00003 0217*RT=00003 0217*CD=00041 0217*CD=00041	Popear on FotA Litigation Appeal Appeal FotA FotA FotA Consultation Consultation	Ayano, Michaell Bach, Barra Bach, Barra Ayan, Mila Ayan, Mila Ayan, Mila Root, Jonastan Michaell, Santar Ayan, Mila Mila, Aya Mila, Aya	CA AIS INC NIK ORG MIK ORG AINS SIM ORG MIK ORG	Y, Akhila M, Ambica Y, Akhila Admin, Admin Admin, Admin Y, Akhila Admin, Admin Indragant, Sreekanth Indragant, Sreekanth	07/11/2018 12/18/2017 03/02/2018 10/01/2018 12/28/2017 12/28/2017 12/28/2017 13/28/2017 10/01/2018 10/01/2018 10/01/2018 11/20/2017	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499 499 499 499	Destroy Destroy Destroy Archive Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy	Rady for Dekision Rady for Dekision Rady for Oekision Rady for Dekision Rady for Dekision
	018*1A.2002.00073 018-117-00073 018-117-00073 018-117-00073 018-118-1007 018-118-10073 018-118-10073 018-117-0003 018-117-0003 018-117-0003 018-117-0003 018-117-0003 018-117-0003 018-117-0003 018-117-0003 019-11	Popear NA FotA Litigation Appeal FotA Request1 FotA Consultation Consultation RA Request	Arano, Michaell Arano, Michaell Arano, Michaell Composite to the regulation Krig, Milly Krig, Milly Krig, Milly Krig, Milly Krig, Milly Krig, Milly Krig Milly Krig Milly Krig	CA AIS INC MIK ORG MIK ORG AINS SIM ORG MIK ORG	Y, Akhila M, Ambica X, Akhila Admin, Admin Admin, Admin Admin, Admin Indraganti, Sreekanth Indraganti, Sreekanth Indraganti, Sreekanth Indraganti, Sreekanth	02/11/2018 12/18/2017 02/02/2018 12/28/2017 12/28/2017 12/28/2017 12/28/2017 10/01/2018 10/01/2018 09/30/2018 11/30/2017	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499 499 499 499	Deatroy Deatroy Deatroy Archive Deatroy Deatroy Deatroy Deatroy Deatroy Archive Deatroy Deatroy Deatroy Deatroy	addy for Oxistion Rady for Oxistion
	2118-FCH-4C \$400007 2118-FCH-4053 2118-FCH-20531 2018-FCH-20531 2018-FCH-20530 CCCD-5H-00005 2018-FCH-40535 Code-00007 2018-FCH-40555 Code-00007 2017-FCH-405405 COCD-50101 2017-FCH-405405 COCD-50101 2017-FCH-405405 2017-FCH-405404 2017-FCH-40541 2017-FCH-40541	Popear NA FotA Appeal Appeal FotA FotA Request1 FotA Consultation Consultation RA Request	Marah, Michaell Bah, Buran Da regionese this regul. Do response to this regul down tilling Social Database Motor Locations Motor States Funda States Mills, Style Mills, Style Mills, Style Mills, Style	CA AIS INC MIX ORG MIX ORG AINS SJM ORG MIX ORG	Y, Akhila M, Ambiça Y, Akhila Admin, Admin Admin, Admin Y, Akhila Admin, Admin Indraganti. Sreekanth Indraganti. Sreekanth Indraganti. Sreekanth Admin, Admin	02/12/2017 02/02/2018 10/01/2018 12/28/2017 12/28/2017 12/28/2017 12/28/2017 10/01/2018 10/01/2018 10/01/2018 10/01/2018 10/01/2017 29/25/2017	01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019 01/07/2019	499 499 499 499 499 499 499 499 499 499	Destroy Destroy Archive Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy Destroy	Mad in Deletion Read for Deletion

5 Retention Management Actions Report

All Retention Actions are logged in the system. These actions can be reported quickly and easily using the *Retention Management Actions Report*. To view a Retention Management Actions Report,

1. Navigate to Administration > Retention Module > Retention Management Actions Report. The Retention Management Actions screen appears:

Retention Management Actions	a ×
Load Criteria	
Select Saved Report Criteria : [Select] v Or Click Next to Create a New R	leport Next Generate Delete Close

2. You have the option to select a saved report under the *Select Saved Report Criteria* dropdown. Otherwise, click **Next** to create a new report.

3.	After clicking	Next, the R	etention l	Management Actions	report appears	as shown below	:
----	----------------	-------------	------------	--------------------	----------------	----------------	---

Retention Management Actions	∃ ×
Generate Save Report Criteria Refresh Clear Ba	ack Close
Report Header Display Options	
Display on 1st page	Display on all pages 💿 Do not display on any pages
Select Options	
Group By:	
Retention Status	
Mark for Action	Deleted 💿 Both
Filter By	
Select User(s) :	Action Office :
Request Type : All 🔹	Final Disposition : Select Final Disposition
Actions Performed	
Between the Dates	
For the Month	Select Dates
For the Year	O5/01/2020 O5/20/2020 O5/01/2020 O5/01/202 O5/01/202 O5/01/202 O5/01/202 O5/01/202 O5/01/202 O5/01/202 O5/01/20 O5/01/20 O5/01/20 O5/01/20 O5/01/20 O5/01/20 O5/01 O5/01/20 O5/01/20 O5/01 O5/01 O5/01 O5/01 O5/01 O5/0
Year to Date	

4. Use the options on this screen to configure the report output. There are Report Header Display Options, Group By, Filter By, Retention Status, and Select Dates for the Actions Performed.

5. Click **Generate** to generate the report output. You can also click **Save Report Criteria** to save this report for later use (selected in Step 2 above). A sample report output is shown below:

	8									0
Print Print All E	xport Back	Close								
AINS Inc Street # 4 Maximus tower Level 4 Suite 2 Gaithersberg, MD 57683								ite 200		
		bat	Mark for Action	5 / 20 / 20 20			Repor Time:	t Date:	05/20/20 11:59 PM	20
	Action Marked	Marked		Closed	Retention	Reference	Request	# of	Request	
🕰 Request #	Office Date and Time	Ву	Comments	Date	Expiry Date		Disposition	Days Expired	Туре	
2018-FOIA-00017	HQ 05/14/2020 Testing	Admin, Admin		8/27/2018	7/9/2019		Denied in part	316	FOIA/PA	
			Total No of Requests	. 1						
K ∢			Page 1 T of 1							

6. There are options to **Print** and **Export** the report. Click **Close** to close the report output.