Criteria First

Here are some screen shots showing how the DocuShare Archive Assistant (DSAA) Expunger looks and operates on your DocuShare or DocuShare Archive server. There is some overlap of functionality with Xerox' Lifecycle Manager, but the differences are these:

- Lifecycle Manager does not work on an archive server.
- DSAA Expunger does not use policies.
- DSAA can operate on both your primary DocuShare server and on your DocuShare Archive server.
- DSAA Expunger works with Hold properties to flag documents that should be retained.
- DSAA Expunger allows you to delete multiple documents at one time rather than having to click on each document and confirm each should be deleted.

It's possible you would want to use both. Use Lifecycle Manager if you don't have an archive server or if you want to clear out documents that should never be archived for a longer term. For those documents that do move to the archive server, DSAA will facilitate clearing them out much more easily than carefully searching for older documents and deciding whether they should be deleted a page at a time. The DSAA Expunger listing is a simple view that eliminates display of abstracts and library functions. You can view the object by clicking on its title or its properties by clicking on the object's handle.

We recommend that if you intend to archive documents that you set the expiration and deletion date properties when you file the document. The deletion_date (or similarly named) property isn't a standard property, so this needs to be created for document objects or created as a global property for all objects. DAVupDoc allows for other names for this property. So, you may want to file a document on November 7, 2012 to be archived in two years on November 7, 2014 and deleted in seven years on November 7, 2019. This is easy to set up and provides easy guidelines to follow for lifecycle management on your primary or archive server. If you haven't established dates for expiration and deletion, use DSAA to sweep through your collections and set them based on the creation or modification dates.

Setting expiration and deletion dates isn't all that practical for saving MS Office and other documents which are generally manually filed as users will overlook this task, but it should always be done when there is an automated process involved. When we set up a customer capturing data with ABBYY FlexiCapture or Recognition Server's indexing station and process them through DAVupDoc, we ask about the retention plan and set the expiration and deletion dates accordingly.

If there's any possibility that you need to place a hold on a document to prevent it from being deleted then we recommend you add two properties for documents and any other cloned objects derived from the document object or to all objects as a global property.

hold a Boolean checkmark for a user to indicate a document shouldn't be deleted until released

holdinfo a string property that allows a user to state why this document should be held until released by a proper authority

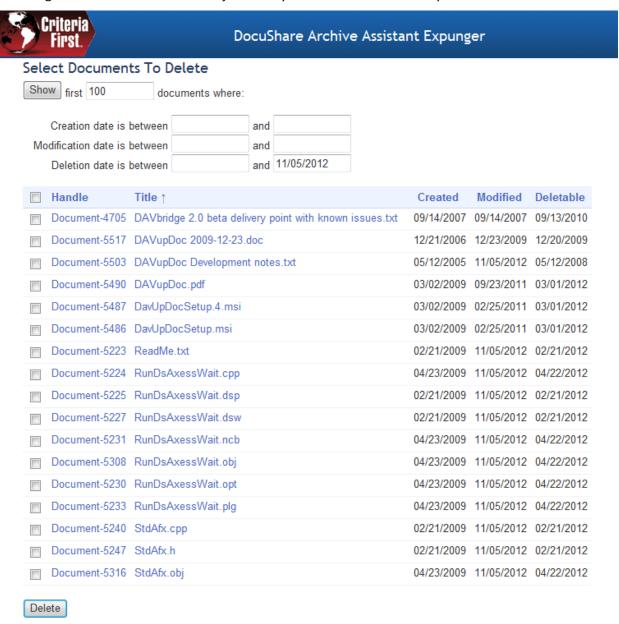
You'll see in the following illustrations that items marked as Hold will be prominently highlighted in red so you're unlikely to miss them as you review your files. The second illustration shows that when you click on the "select all" checkmark at the top the Hold item is omitted to prevent you from deleting it without specifically checking that file for inclusion. You should discuss and codify a policy where an archived document placed on hold should be restored to the primary DocuShare site and reviewed. You can then decide whether to remove the hold and let it archive again to be deleted in your next DSAA session or dealt with in another manner.

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The following illustrations are cropped from the browser view using DSAA Expunger and illustrate various usage scenarios. You can sort your listing by Handle, Title, Created, Modified, or Deletable.

If you have other questions or suggestions for enhancing DSAA and the DSAA Expunger, please contact Criteria First via support@criteriafirst.com or by calling us at 972-492-4428.

Searching for documents and other objects ready for deletion as of this day.



Criteria First

Checking the box by the Handle heading selects all documents except for those on hold.

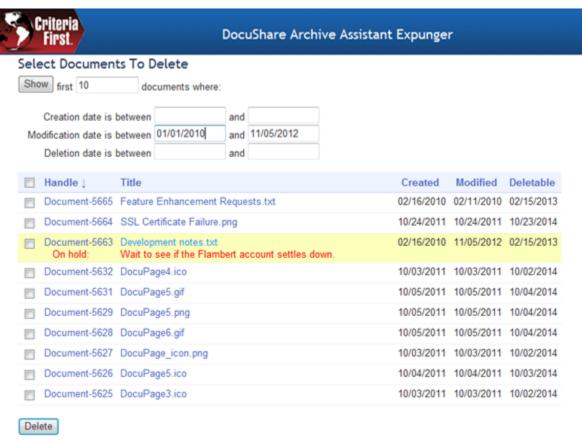


V	Handle	Title ↑	Created	Modified	Deletable
V	Document-4705	DAVbridge 2.0 beta delivery point with known issues.txt	09/14/2007	09/14/2007	09/13/2010
V	Document-5517	DAVupDoc 2009-12-23.doc	12/21/2006	12/23/2009	12/20/2009
	On hold:	DAVupDoc Development notes.txt Contains historical development info and shouldn't be deleted.	05/12/2005	11/07/2012	05/12/2008
V	Document-5490	DAVupDoc.pdf	03/02/2009	09/23/2011	03/01/2012
V	Document-5487	DavUpDocSetup.4.msi	03/02/2009	02/25/2011	03/01/2012
√	Document-5486	DavUpDocSetup.msi	03/02/2009	02/25/2011	03/01/2012
V	Document-5223	ReadMe.txt	02/21/2009	11/05/2012	02/21/2012
V	Document-5224	RunDsAxessWait.cpp	04/23/2009	11/05/2012	04/22/2012
J	Document-5225	RunDsAxessWait.dsp	02/21/2009	11/05/2012	02/21/2012
V	Document-5227	RunDsAxessWait.dsw	02/21/2009	11/05/2012	02/21/2012
V	Document-5231	RunDsAxessWait.ncb	04/23/2009	11/05/2012	04/22/2012
V	Document-5308	RunDsAxessWait.obj	04/23/2009	11/05/2012	04/22/2012
J	Document-5230	RunDsAxessWait.opt	04/23/2009	11/05/2012	04/22/2012
J	Document-5233	RunDsAxessWait.plg	04/23/2009	11/05/2012	04/22/2012
J	Document-5240	StdAfx.cpp	02/21/2009	11/05/2012	02/21/2012
J	Document-5247	StdAfx.h	02/21/2009	11/05/2012	02/21/2012
V	Document-5316	StdAfx.obj	04/23/2009	11/05/2012	04/22/2012

Delete

Criteria First

Searching for documents based on their modification dates



Searching across two properties with a date range

