

Using the DocuShare Archive Assistant Expunger

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.



DocuShare Archive Assistant Expunger

Select Documents To Delete

Show

 first documents where:

Creation date is between

and

Modification date is between

and

Deletion date is between

and

11/05/2012


<input type="checkbox"/>	Handle	Title ↑	Created	Modified	Deletable
<input type="checkbox"/>	Document-4705	DAVbridge 2.0 beta delivery point with known issues.txt	09/14/2007	09/14/2007	09/13/2010
<input type="checkbox"/>	Document-5517	DAVupDoc 2009-12-23.doc	12/21/2006	12/23/2009	12/20/2009
<input type="checkbox"/>	Document-5503	DAVupDoc Development notes.txt	05/12/2005	11/05/2012	05/12/2008
<input type="checkbox"/>	Document-5490	DAVupDoc.pdf	03/02/2009	09/23/2011	03/01/2012
<input type="checkbox"/>	Document-5487	DavUpDocSetup.4.msi	03/02/2009	02/25/2011	03/01/2012
<input type="checkbox"/>	Document-5486	DavUpDocSetup.msi	03/02/2009	02/25/2011	03/01/2012
<input type="checkbox"/>	Document-5223	ReadMe.txt	02/21/2009	11/05/2012	02/21/2012
<input type="checkbox"/>	Document-5224	RunDsAxessWait.cpp	04/23/2009	11/05/2012	04/22/2012
<input type="checkbox"/>	Document-5225	RunDsAxessWait.dsp	02/21/2009	11/05/2012	02/21/2012
<input type="checkbox"/>	Document-5227	RunDsAxessWait.dsw	02/21/2009	11/05/2012	02/21/2012
<input type="checkbox"/>	Document-5231	RunDsAxessWait.ncb	04/23/2009	11/05/2012	04/22/2012
<input type="checkbox"/>	Document-5308	RunDsAxessWait.obj	04/23/2009	11/05/2012	04/22/2012
<input type="checkbox"/>	Document-5230	RunDsAxessWait.opt	04/23/2009	11/05/2012	04/22/2012
<input type="checkbox"/>	Document-5233	RunDsAxessWait.plg	04/23/2009	11/05/2012	04/22/2012
<input type="checkbox"/>	Document-5240	StdAfx.cpp	02/21/2009	11/05/2012	02/21/2012
<input type="checkbox"/>	Document-5247	StdAfx.h	02/21/2009	11/05/2012	02/21/2012
<input type="checkbox"/>	Document-5316	StdAfx.obj	04/23/2009	11/05/2012	04/22/2012

Delete

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



DocuShare Archive Assistant Expunger

Select Documents To Delete

Show first documents where:

Creation date is between and

Modification date is between and

Deletion date is between and


<input checked="" type="checkbox"/>	Handle	Title ↑	Created	Modified	Deletable
<input checked="" type="checkbox"/>	Document-4705	DAVbridge 2.0 beta delivery point with known issues.txt	09/14/2007	09/14/2007	09/13/2010
<input checked="" type="checkbox"/>	Document-5517	DAVUpDoc 2009-12-23.doc	12/21/2006	12/23/2009	12/20/2009
<input type="checkbox"/>	Document-5503	DAVUpDoc Development notes.txt On hold: Contains historical development info and shouldn't be deleted.	05/12/2005	11/07/2012	05/12/2008
<input checked="" type="checkbox"/>	Document-5490	DAVUpDoc.pdf	03/02/2009	09/23/2011	03/01/2012
<input checked="" type="checkbox"/>	Document-5487	DavUpDocSetup.4.msi	03/02/2009	02/25/2011	03/01/2012
<input checked="" type="checkbox"/>	Document-5486	DavUpDocSetup.msi	03/02/2009	02/25/2011	03/01/2012
<input checked="" type="checkbox"/>	Document-5223	ReadMe.txt	02/21/2009	11/05/2012	02/21/2012
<input checked="" type="checkbox"/>	Document-5224	RunDsAxessWait.cpp	04/23/2009	11/05/2012	04/22/2012
<input checked="" type="checkbox"/>	Document-5225	RunDsAxessWait.dsp	02/21/2009	11/05/2012	02/21/2012
<input checked="" type="checkbox"/>	Document-5227	RunDsAxessWait.dsw	02/21/2009	11/05/2012	02/21/2012
<input checked="" type="checkbox"/>	Document-5231	RunDsAxessWait.ncb	04/23/2009	11/05/2012	04/22/2012
<input checked="" type="checkbox"/>	Document-5308	RunDsAxessWait.obj	04/23/2009	11/05/2012	04/22/2012
<input checked="" type="checkbox"/>	Document-5230	RunDsAxessWait.opt	04/23/2009	11/05/2012	04/22/2012
<input checked="" type="checkbox"/>	Document-5233	RunDsAxessWait.plg	04/23/2009	11/05/2012	04/22/2012
<input checked="" type="checkbox"/>	Document-5240	StdAfx.cpp	02/21/2009	11/05/2012	02/21/2012
<input checked="" type="checkbox"/>	Document-5247	StdAfx.h	02/21/2009	11/05/2012	02/21/2012
<input checked="" type="checkbox"/>	Document-5316	StdAfx.obj	04/23/2009	11/05/2012	04/22/2012

Delete

Using the DocuShare Archive Assistant Expunger

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Searching for documents based on their modification dates



DocuShare Archive Assistant Expunger

Select Documents To Delete

Show first 10 documents where:

Creation date is between and


Modification date is between and

Deletion date is between and

<input type="checkbox"/> Handle ↓	Title	Created	Modified	Deletable
<input type="checkbox"/> Document-5665	Feature Enhancement Requests.txt	02/16/2010	02/11/2010	02/15/2013
<input type="checkbox"/> Document-5664	SSL Certificate Failure.png	10/24/2011	10/24/2011	10/23/2014
<input type="checkbox"/> Document-5663	Development notes.txt On hold: Wait to see if the Flambert account settles down.	02/16/2010	11/05/2012	02/15/2013
<input type="checkbox"/> Document-5632	DocuPage4.ico	10/03/2011	10/03/2011	10/02/2014
<input type="checkbox"/> Document-5631	DocuPage5.gif	10/05/2011	10/05/2011	10/04/2014
<input type="checkbox"/> Document-5629	DocuPage5.png	10/05/2011	10/05/2011	10/04/2014
<input type="checkbox"/> Document-5628	DocuPage6.gif	10/05/2011	10/05/2011	10/04/2014
<input type="checkbox"/> Document-5627	DocuPage_icon.png	10/03/2011	10/03/2011	10/02/2014
<input type="checkbox"/> Document-5626	DocuPage5.ico	10/04/2011	10/04/2011	10/03/2014
<input type="checkbox"/> Document-5625	DocuPage3.ico	10/03/2011	10/03/2011	10/02/2014

Delete

Searching across two properties with a date range



DocuShare Archive Assistant Expunger

Select Documents To Delete

Show first 100 documents where:

Creation date is between and

Modification date is between and

Deletion date is between and

<input type="checkbox"/> Handle ↓	Title	Created	Modified	Deletable
<input type="checkbox"/> Document-5666	DocuPage Setup and Usage Guide.doc	02/16/2010	05/12/2005	02/15/2013
<input type="checkbox"/> Document-5665	Feature Enhancement Requests.txt	02/16/2010	02/11/2010	02/15/2013
<input type="checkbox"/> Document-5664	SSL Certificate Failure.png	10/24/2011	10/24/2011	10/23/2014
<input type="checkbox"/> Document-5663	Development notes.txt On hold: Wait to see if the Flambert account settles down.	02/16/2010	11/05/2012	02/15/2013
<input type="checkbox"/> Document-5662	Setup1.msi	02/16/2010	01/29/2006	02/15/2013
<input type="checkbox"/> Document-5661	ViewTree.jpg	02/16/2010	05/17/2005	02/15/2013
<input type="checkbox"/> Document-5660	DocuPage CD sleeve.doc	02/16/2010	05/06/2005	02/15/2013