Section 7 Report Retention Management

All reports generated by the IPAC System are automatically saved to the IPAC database. Reports that are no longer needed should be deleted to save storage space and to make it easier to find and retrieve new reports.

Accessing the Report Retention Management Function

To access the **Report Retention Management** function, log on to the IPAC System and choose the IPAC option from the **IPAC System Main Menu** as explained in the *Introduction*. The **IPAC Main Menu** is shown in Figure 7.1.
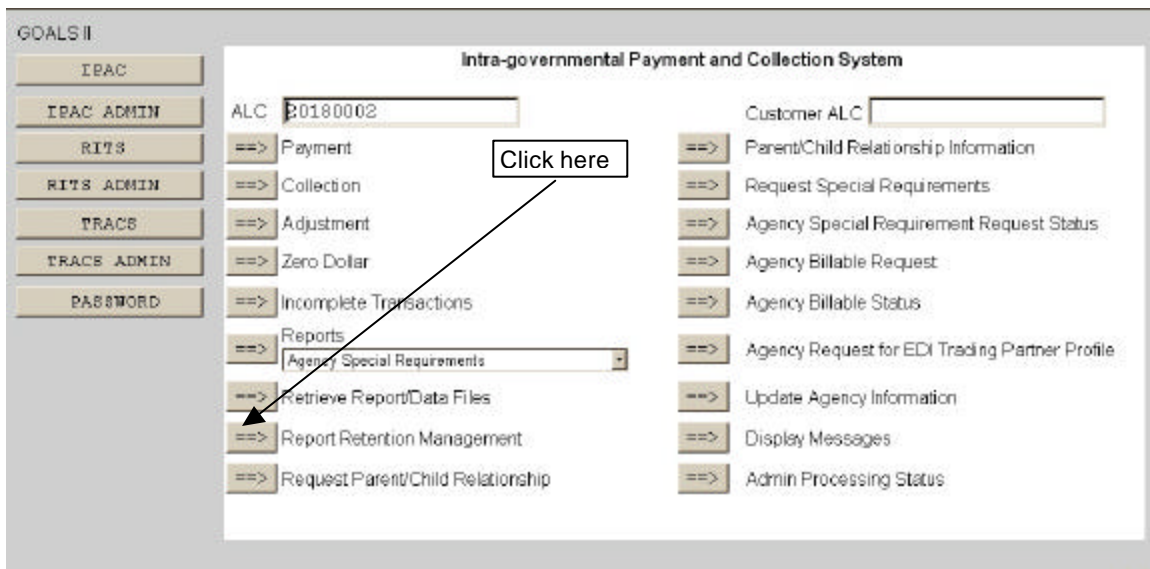

Figure 7.1   IPAC Main Menu

ALC

The first field on this screen is the **A**gency **L**ocation **C**ode (**ALC**). This is the ALC of your agency or of the agency for which you are doing business. Your Logon ID will determine the ALC(s) for which you are authorized to do business within IPAC.

If you are only authorized to act on behalf of **one ALC**, that ALC will display in the ALC data entry box.

If you are authorized to do business for **multiple ALCs**, those ALCs will display in a drop-down list box for the ALC.

If you are authorized to do business for **more than 25 ALCs**, the <u>ALC</u> field will display as a blank data entry box.

The <u>ALC</u> field is required and you must accept the ALC shown as a default, choose an ALC from the drop-down menu or enter an ALC in this field.

Customer ALC

No entry is required in the <u>Customer ALC</u> field.

Click the "Report Retention Management" button as shown in Figure 7.1. This will display the **Report Retention Management ALC Entry** screen shown in Figure 7.2.

Report Retention Management ALC Entry

Figure 7.2   Report Retention Management ALC Entry

ALC Entry Data Entry Fields

Report Dates

Enter a <u>Start Date</u> and an <u>End Date</u> for the reports in YYYY-MM-DD format. These fields are required.

> The start date and end dates refer to the dates the reports were originally generated, not the dates covered by the reports.

<u>Login ID</u>
> The Login ID used to access the IPAC System will display in the <u>Login ID</u> field.

<u>Enter ALC Below</u>
> If you entered an ALC on the **IPAC Main Menu**, it will display in the first data entry box. There are additional data entry boxes to allow you to enter up to a total of 25 ALCs whose outstanding reports you would like to review for possible deletion. Only the reports you created will be available for you to delete. (All of the data entry boxes may not be visible at one time through your browser, but they may be accessed using the scroll bar to the right of your screen, or by hitting the tab key after entering an ALC in the last visible box.)

ALC Entry Function Buttons

"OK"
> Displays a list of the reports you created which are currently stored for the ALC(s) you entered and are available for deletion.

"Clear"
> Resets the data entry fields to their values the last time the screen was displayed. No data is submitted to the IPAC database.

"Return to IPAC Main Menu"
> Returns to the **IPAC Main Menu** without retrieving a list of reports.

"Help"
> Displays help information for this screen.

Flagging Reports for Deletion

Click the "OK" button on the **Report Retention Management ALC Entry** screen to display a list of the reports which you created for the ALC(s) entered. If there are no reports stored that meet your selection criterion, you will receive the message shown in Figure 7.3.
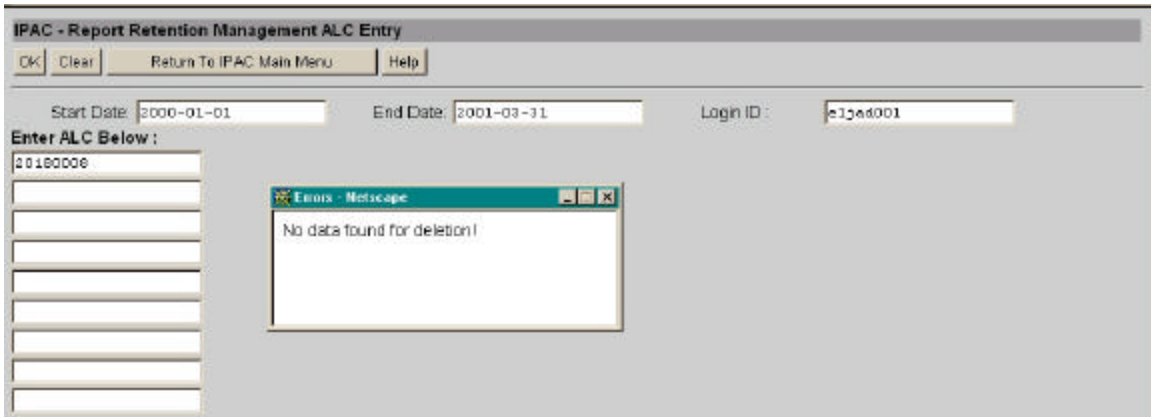
Figure 7.3   No Reports Meeting the Criteria

Close this Error Message window and you will return to the **Report Retention Management ALC Entry** screen where you can enter new report start and end dates, and/or new ALC(s). At this point, the "Clear" button will not erase any of the data entry fields on the screen. You can highlight the data in any of the fields and use the Delete key to delete your entry, or you can highlight the data in the fields and type over it to change it.

If reports exist within the parameters requested, the **Report Retention Management** screen will display as shown in Figure 7.4. No Report File Description was entered at the time the second report on this list was generated. This will make it difficult to determine if this report should be maintained or deleted and illustrates the importance of entering identifying descriptions in the Report File Description field when generating reports.
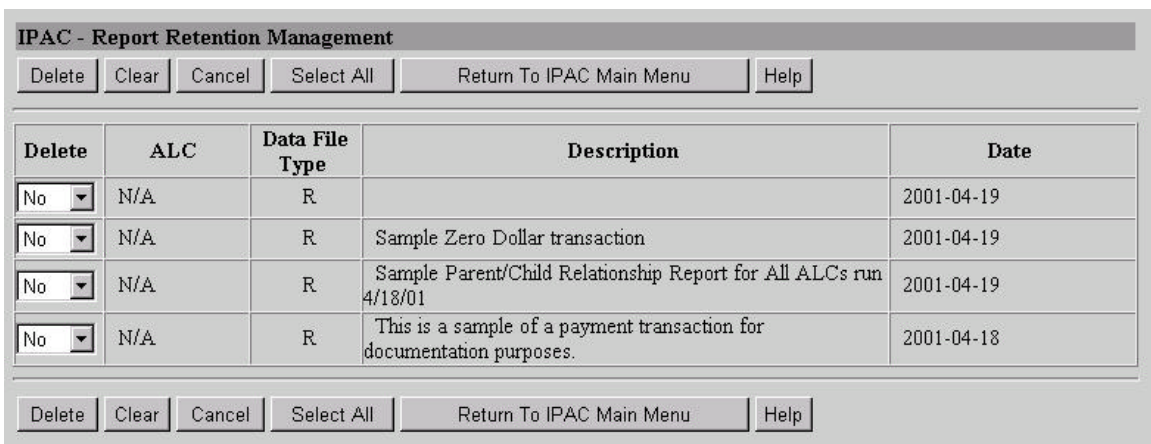

Figure 7.4   Report Retention Management

Report/data files requested to be deleted through this menu option will be flagged for deletion. Actual deletion of the reports/data files will not occur until the nightly

maintenance process is performed. Until this process has been run, you can change the deletion flag (from YES for deletion to NO for no deletion, or vice versa).

Report Retention Management Data Columns

<u>Delete</u>

This field contains a drop-down menu box with YES/NO choices. If a report/data file is not currently flagged for deletion, this field will default to NO. If you change this field to YES, the report will be deleted in the next database maintenance cycle. You may also change this choice from YES to NO to keep a report from being deleted during the next maintenance cycle. This is the only field on this screen that you can change.

<u>ALC</u>

The ALC of the agency which generated the report. A report which contains data for more than one ALC will have N/A in the ALC column.

<u>Data File Type</u>

The type of data currently on the system. Whether the information stored was a report (HTML or PDF) or a data file (CSV or TSV), the data file type will always be "**R**"eport.

<u>Description</u>

The report description entered in the <u>Report File Description</u> field (on the **Report Request** screen) at the time the report was generated.

<u>Date</u>

The date the report was generated.

Report Retention Management Function Buttons

"Delete"

Submits the changes to the report deletion status.

"Clear"

Resets the delete flags to their values the last time the screen was displayed. No data is submitted to the IPAC database.

"Cancel"

Discards any changes you have made to a report deletion status since the last time the database was accessed. Returns you to the **Report Retention Management ALC Entry** screen.

"Select All"

All of the YES/NO deletion flags on the screen will be changed to YES. After you have clicked this button, the "Clear" button will **not** return these flags to their previous state but you can still manually change the individual flags to NO. After selecting this button, you must select "Delete" to submit the changes to the report deletion status.

"Return to IPAC Main Menu"
Returns to the **IPAC Main Menu** without processing any changes you have made to a report deletion status.

"Help"
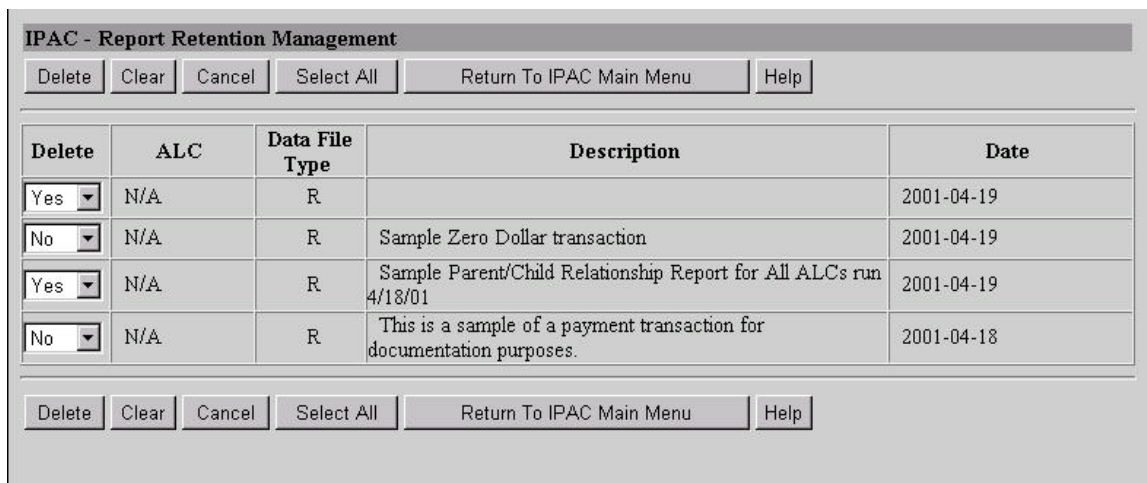Displays help information for this screen.

Figure 7.5   Reports Flagged for Deletion

In Figure 7.5, the first and third reports shown on the screen have been flagged for deletion. These flags can be changed at any time until the reports are actually deleted by the IPAC maintenance cycle. After you have marked the reports for deletion (or changed deletion marks to NO), click "Delete". The confirmation screen shown in Figure 7.6 will display.
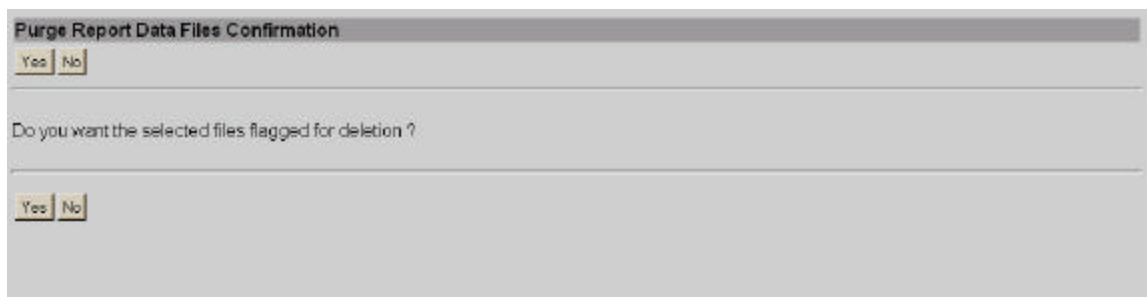

Figure 7.6   Purge Report Data Files Confirmation

Confirmation Screen

If you click "No", none of the changes you entered on the most recent **Report Retention Management** screen will be submitted. You will be returned to the **Report Retention Management** screen as shown in Figure 7.2.

Confirmation Requested

If you click "Yes", the changes to the report deletion status you entered on the **Report Retention Management** screen will be submitted to the IPAC database and those reports marked for deletion will be removed during the next database maintenance cycle. You will see the confirmation screen shown in Figure 7.7.

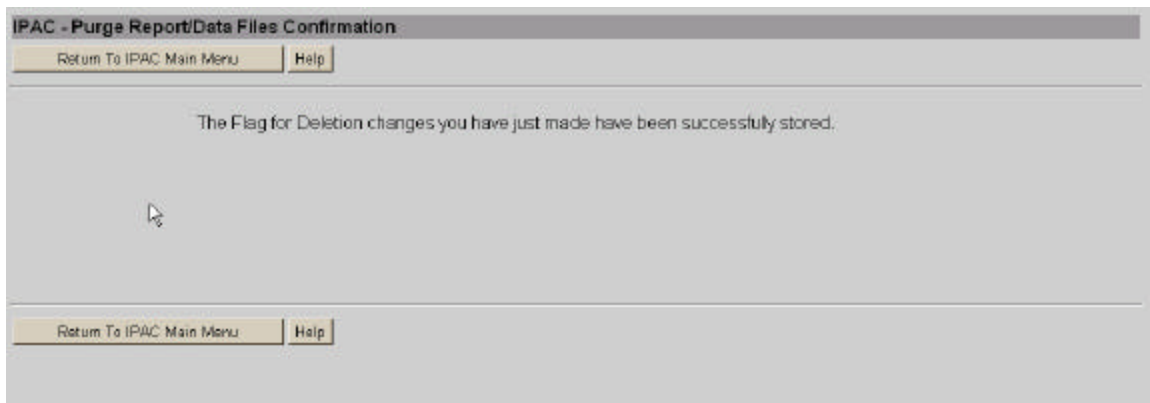### Confirmation Given

Figure 7.7   Purge Report Data Files Completion Confirmation

From this screen you can return to the **IPAC Main Menu** or display help information for this screen.

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