INFORMATION REQUIREMENTS CLEARINGHOUSE

Getting The Most Out Of Retention Manager

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Topics

- User Records

- Legal Research

- Retention Audit History

- Updates

- Protecting Your Data

User Records

- Function of User Records

  – Conversion of old retention schedule

  – Catalog retention assignment for record titles

  – Develop Departmental Retention Schedule

- Importing User Records

  – Functions | Administrator Functions | Import

User Records (cont.)

- Assignment

  - Change assignment in Preferences

    - Assigning Standard Record Series

    - Assigning Retention Rules

  - Assigning Departments

    - Organizational Structure

  - Shorthand: CTRL-R

    - Repeats last assignment

    - Right-click to change assignment type

  - Status bar prompts

Legal Research

- Profile

  - Primary method for legal research

  - Pre-defined Profile setup

  - Adding addition industries and subjects

  - Assigning Legal Groups

  - Regeneration

  - View Legal Research

Legal Research (cont.)

- Legal Group Index with Profiled Legal Research
    - View Profiled Legal Research
    - Remove laws from Legal Group
        - View Profile
        - Modify Profile
        - Regenerate
    - Calculate legal requirements
        - Check Legal Requirements Period
        - Edit retention period
        - Note: Perform after Update

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Legal Research (cont.)

- Legal Search
  - Search for special laws
    - Subjects
    - Word occurrence in text
    - Boolean operators
  - Add to Profile
  - Assign additional industry and subject to Legal Group

Retention Audit History

- Store retention versions as PDF reports
  - Print PDF report versions
  - Store in \Retman\Userdata\co1\Reports by date
    - 20140518 – May 18, 2014
- Approved Retention Schedules
  - Authorize All – Functions | Authorize
  - Reports Prepare "Authorized" reports
    - Edit "User-Defined Reports"
    - Change "Display Status" to "A"

Retention Audit History (cont.)

- Approved Retention Schedules (cont.)
  - Store approved PDF schedule with notation – e.g., 20140518-Approved
  - Backup authorized data – auto directory generation

Updates – 3 times per year

- When happens when you update
  - Update disk determines licenses and update requirements
    - Detects product(s)
    - Detects special licenses – e.g., international law
  - Updates software, reports, etc.
  - Adds updated legal research to \retman\update

Updates (cont.)

- When open Retention Manager
  - Update data added to legal research
  - Revised laws supersede previous version
  - Profile regenerates against updated legal research

- Determining changes in retention
  - Check Legal Requirements Period from Legal Group
  - Update Reports: Legal Requirements Index and Legal Group Index with Legal Research

Updates (cont.)

- Changing retention periods and text
  - All changes treated as "proposed"
  - If "authorized" data exists, changes produce two sets of data – authorize and proposed

- Reports: Change Display Status to "B" (A & P)

- Updating the retention schedule
  - Prepare PDF reports for review
  - After review and approval, "Authorize" and follow above steps to preserve Retention Audit History

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Protecting Your Data

- Backup User Data
  - Functions | Administrator Functions | Restore User Data
  - Backup periodically: before major changes, update, authorizing data

- Restore User Data
  - Functions | Administrator Functions | Restore User Data
  - Full restore of previous backup

- Backup System Data – rarely used

Protecting Your Data (cont.)

- Import Data From Previous Project (version)
  - Best method to restore selected data after delete
  - How
    - Tools menu
    - Select starting function – auto include related items
    - Select directory

- Ensure system backup for RM directory
  - Place data on network server
  - Copy data to server with backup

Protecting Your Data (cont.)

- Profile

  - Auto backup of Profile before each regeneration

  - Preferences: Controls number of "rolling backups"
    - oldest deleted when limit reached

  - Restore Profile

    - Functions | Restore Profile

    - Select Profile version to restore

    - View in Profile

    - Save or reject

Thank You

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