

Report Retention Management

All reports generated by the RITS System are automatically saved to a 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 RITS option from the IPAC System Main Menu as explained in the *Introduction* to this manual. The Main Menu for the RITS system is shown in Figure 3.1.

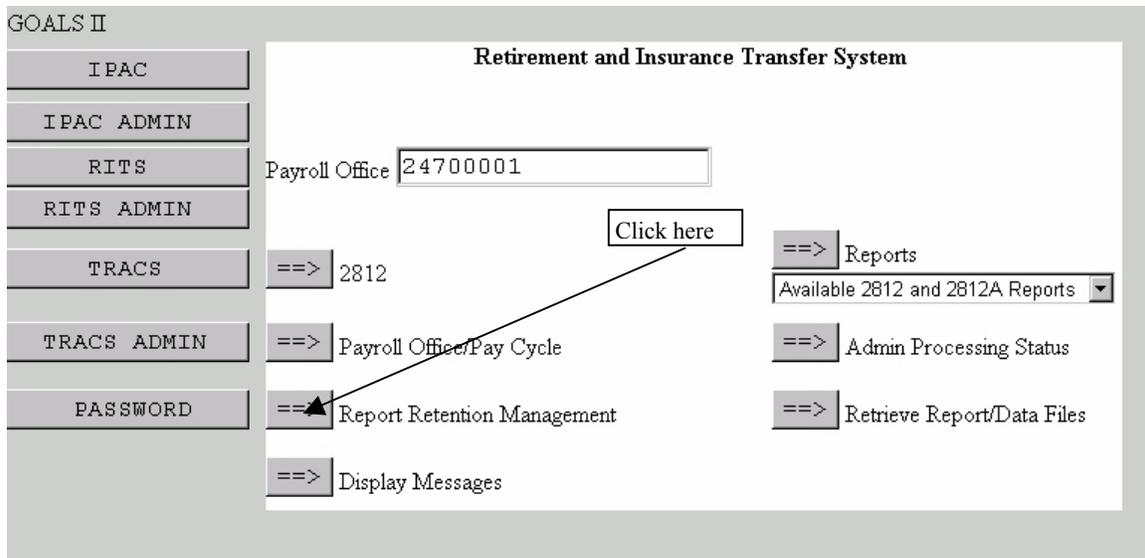


Figure 3.1 RITS Main Menu

Payroll Office

The data entry field on this screen is the **Payroll Office** field. Your Login ID, which you entered to start your session with the IPAC system, will be available to the RITS application. Using that ID, RITS will determine the Payroll Office(s) for whom you are authorized to do business

- If you are only authorized to act on behalf of **one Payroll Office**, that Payroll Office number will appear in the Payroll Office data entry box as shown above.
- If you are authorized to act for **multiple Payroll Offices**, those Payroll Office numbers will appear in a drop-down menu box for the Payroll Office.
- If you are authorized to act for **more than 25 Payroll Offices**, the Payroll Office field will appear as a blank data entry box.

The Payroll Office field is mandatory and you must accept the Payroll Office number shown as a default, choose a Payroll Office from the drop down menu or enter a Payroll Office number in this field.

Click the “Report Retention Management” button as shown in Figure 3.1. This will bring up the **RITS - Report Retention Management Payroll Office Entry** screen shown in Figure 3.2.

Report Retention Management Payroll Office Entry

RITS - Report Retention Management - Payroll Office Entry

OK Clear Return To RITS Main Menu Help

Start Date: 2001-06-05 End Date: 2001-06-06

Enter Payroll Office Numbers Below :

24700001

[Empty input fields]

Figure 3.2 RITS - Report Retention Management Payroll Office Entry

Payroll Office Entry Data Entry Fields

Start Date

The generation date (entered in YYYY-MM-DD format) of the first report(s) you want to retrieve.

End Date

The generation date (entered in YYYY-MM-DD format) of the last report(s) you want to retrieve.

These are the dates on which the requested reports were generated, not the dates covered by the reports.

Enter Payroll Office Below:

If you entered a Payroll Office on the RITS 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 Payroll Offices whose outstanding reports you would like to review for retention or deletion. (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 a Payroll Office in the last visible box.)

Only the reports you created through the “Reports” option on the RITS Main Menu will be available to you.

Payroll Office Entry Function Buttons

“OK”

Displays a list of the reports you created which are currently stored for the Payroll Office(s) you entered.

“Clear”

Resets all data entry fields to their status the last time the screen was displayed.

“Return to RITS Main Menu”

Returns you to the **RITS Main Menu**.

“Help”

Display page level, context sensitive help for this screen.

Flagging Reports for Deletion

Click the “OK” button on the **RITS - Report Retention Management Payroll Office Entry** screen to bring up a list of the reports which you created for the Payroll Office(s) entered. If there are no stored reports for the entered Payroll Office(s) which were generated between the Start and End Dates you entered, you will receive the error message shown in Figure 3.3.

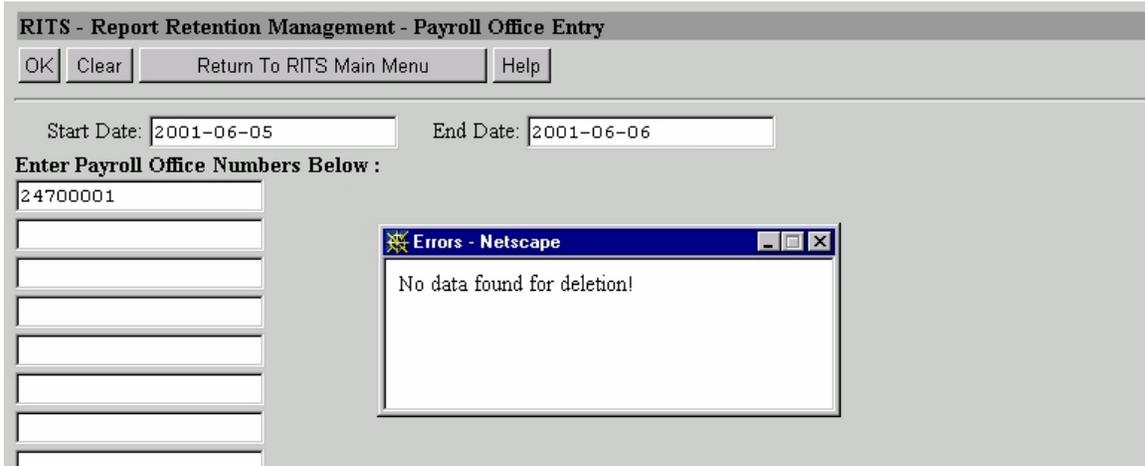


Figure 3.3 Error Message

Close this Error Message window and you will return to the **RITS - Report Retention Management Payroll Office Entry** screen where you can enter new report starting and ending dates, and/or new Payroll Office(s). At this point, the “Clear” button will not erase any of the data entry fields on this 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 3.4.

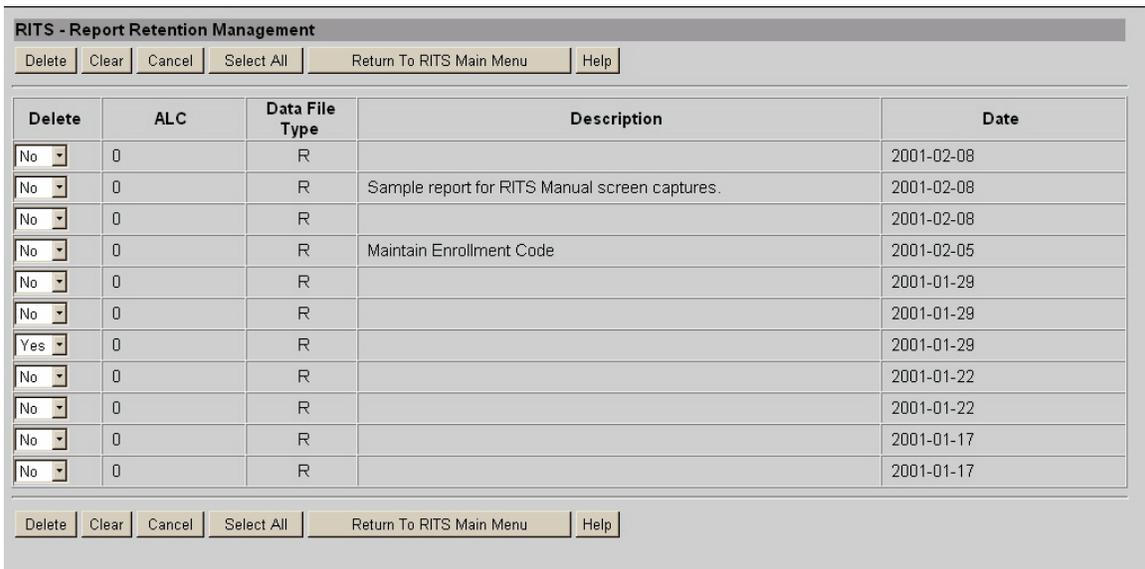


Figure 3.4 RITS Report Retention Management

You will not actually delete a report from RITS. Reports are deleted during a maintenance process that is run nightly. Through this function, you will flag reports for

deletion by the maintenance process. 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 Fields

Delete

This field contains a drop down menu with YES/NO choices. If a report 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. This is the only field on this screen that you can edit.

Payroll Office

The Payroll Office of the agency which generated the report, or on whose behalf the report was generated. A report which contains data for more than one Payroll Office will have a zero in the Payroll Office column. A report which contains data not related to specific payroll offices (such as the Holiday Report) will have "N/A" (for Not Applicable) in this column.

Data File Type

The type of data currently stored in the system. **R** = Report.

Description

The report description entered at the time the report was generated.

Date

The date the report was generated.

Report Retention Management Function Buttons

"Next/Prior"

If your request retrieves more reports than will fit on the screen, "Next" and/or "Prior" buttons will appear as needed to allow you to locate reports.

"Delete"

Submits the changes to the report deletion status.

"Clear"

Resets all data entry fields to their values the last time the screen was displayed.

"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 Payroll Office 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.

“Return to RITS Main Menu”

Returns you to the **RITS Main Menu** screen

“Help”

Displays the page level, context sensitive help for this screen

The screenshot shows the 'RITS - Report Retention Management' interface. At the top, there is a title bar and a menu bar with buttons for 'Delete', 'Clear', 'Cancel', 'Select All', 'Return To RITS Main Menu', and 'Help'. Below this is a table with the following columns: 'Delete', 'ALC', 'Data File Type', 'Description', and 'Date'. The table contains 13 rows of data. The seventh row has a 'Delete' dropdown menu set to 'Yes', while all other rows are set to 'No'. The 'Return To RITS Main Menu' button is highlighted in yellow.

Delete	ALC	Data File Type	Description	Date
No	0	R		2001-02-08
No	0	R	Sample report for RITS Manual screen captures.	2001-02-08
No	0	R		2001-02-08
No	0	R	Maintain Enrollment Code	2001-02-05
No	0	R		2001-01-29
No	0	R		2001-01-29
Yes	0	R		2001-01-29
No	0	R		2001-01-22
No	0	R		2001-01-22
No	0	R		2001-01-17
No	0	R		2001-01-17

Figure 3.5 Reports Flagged for Deletion

In Figure 3.5, the seventh report shown on the screen has been flagged for deletion. This flag can be changed at any time until the reports are actually deleted by the RITS maintenance cycle. After you have marked the reports for deletion (or changed deletion marks to NO), click “Delete”. The confirmation screen shown in Figure 3.6 will display.

Confirmation Screens

Confirmation Requested

Purge Report Data Files Confirmation

Yes No

Do you want the selected files flagged for deletion ?

Yes No

Figure 3.6 Purge Report Data Files Confirmation

If you click "No", none of the changes you entered on the most recent **RITS - Report Retention Management** screen will be submitted. You will be returned to the **RITS - Report Retention Management** screen (Figure 3.4).

Confirmation Given

If you click "Yes", the changes to report deletion status you entered on the **RITS - Report Retention Management** will be submitted to the RITS database and those reports marked for deletion will be removed during the next regular database maintenance cycle. You will see the confirmation screen shown in Figure 3.7.

IPAC - Purge Report/Data Files Confirmation

Return To RITS Main Menu Help

The Flag for Deletion changes you have just made have been successfully stored.

Return To RITS Main Menu Help

Figure 3.7 Purge Report Data Files Completion Confirmation

From this screen you can choose to display the system help for this screen ("**Help**") or return to the main menu ("**RITS Main Menu**").