

Section 1 Report Retention Management

All reports generated by the TRACS application 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 TRACS option from the **IPAC System Main Menu** as explained in the *Introduction* to this manual. The Main Menu for the TRACS application is shown in Figure 1.1.

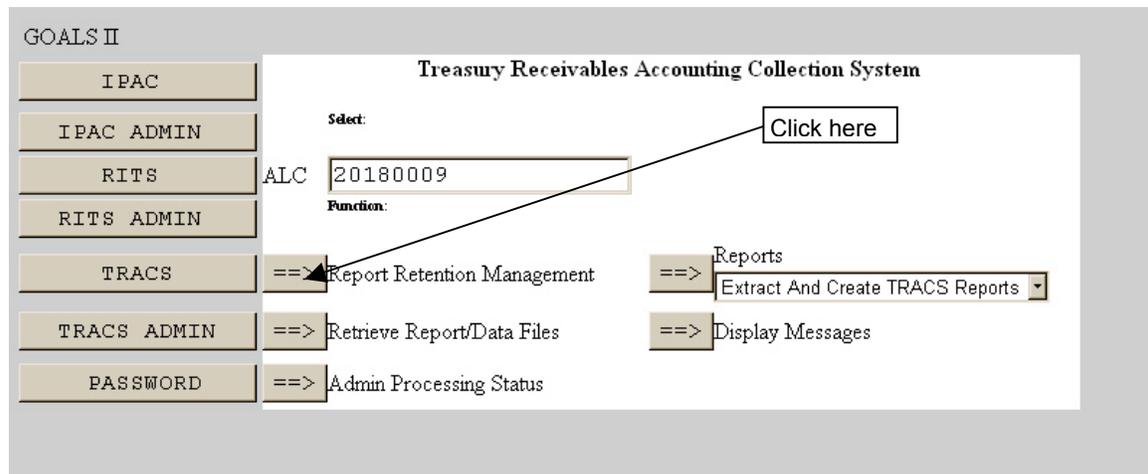


Figure 1.1 TRACS Main Menu

ALC

The first field on this screen is the **ALC** (Agency Location Code). This is the ALC of your agency or of the agency for which you are doing business. Your **Login ID** will determine the ALC(s) for whom you are authorized to do business within TRACS.

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

If you are authorized to act for **multiple ALCs**, those ALCs will display in a drop-down menu box for the ALC field.

If you are authorized to act for **more than 25 ALCs**, the ALC field will display as a blank data entry box.

The ALC field is mandatory 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.

Click the “Report Retention Management” button as shown in Figure 1.1. This will display the **TRACS - Report Retention Management ALC Entry** screen shown in Figure 1.2.

Report Retention Management ALC Entry

The screenshot shows a web-based form titled "TRACS - Report Retention Management ALC Entry". At the top, there are four buttons: "OK", "Clear", "Return To TRACS Main Menu", and "Help". Below the buttons, there are three input fields: "Start Date:" (empty), "End Date:" (empty), and "Login ID:" (containing the text "eljad001"). Underneath these fields is a section labeled "Enter ALC Below :". This section contains a vertical list of four empty input boxes, likely for selecting or entering ALC values.

Figure 1.2 TRACS - Report Retention Management ALC Entry

ALC Entry Data Entry Fields

Start Date

The date to begin the report request.

End Date

The date to end the report request.

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

Login ID

The Login ID of the person who generated the reports you want to retrieve will automatically be populated in this field.

Enter ALC Below:

If you entered an ALC on the **TRACS 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 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 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.

“Clear”

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

“Return to TRACS Main Menu”

Discards any changes you have made to a report deletion status since the last time the database was accessed. Returns you to **TRACS Main Menu** screen.

Flagging Reports for Deletion

Click the “OK” button on the **TRACS - Report Retention Management ALC Entry** screen to bring up a list of the reports which you created for the ALC(s) entered. If there are no stored reports for the entered ALC(s) which were generated between the Start and End Dates you entered, you will receive a message to that effect as shown in Figure 1.3.

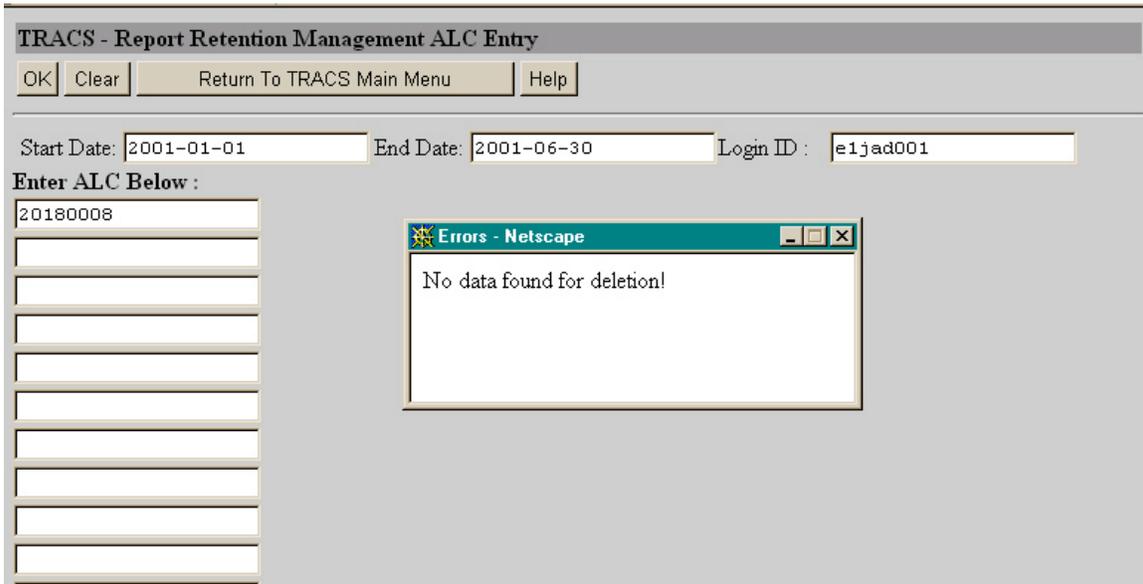


Figure 1.3 No Reports Meeting the Criteria

Close this Error Message window and you will return to the **TRACS - Report Retention Management ALC Entry** screen where you can enter new report starting and ending 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 1.4.

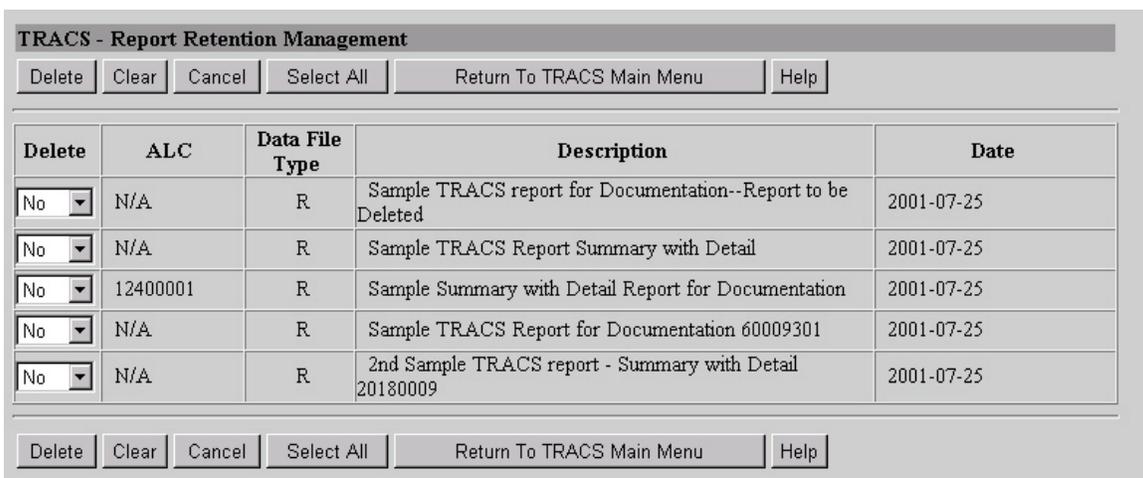


Figure 1.4 TRACS Report Retention Management

You will not actually delete a report from TRACS. Reports are deleted during a maintenance process that is normally run nightly while the database is not accessible to users. 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 box with YES/NO choices. If a report is not currently flagged for deletion, this field will default to NO. If you change this to field to YES, the report will be deleted in the next database maintenance cycle, usually overnight. You may also change this choice from YES to NO to keep a report from being deleting during the next maintenance cycle. This is the only field on this screen that you can alter.

ALC

The ALC of the agency which generated the report, or on whose behalf the report was generated. A report which contains data for more than one ALC will have a zero in the ALC column.

Data File Type

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

Description

The report description entered into the Report File Description field on the Report Request screen at the time the report was generated.

Date

The date the report was generated.

Report Retention Management Function Buttons

“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 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 back to NO.

“Return to TRACS Main Menu”

Discards any changes you have made to a report deletion status since the last time the database was accessed. Returns you to **TRACS Main Menu** screen.

“Help”

Displays the system help for this screen

The screenshot shows the 'TRACS - Report Retention Management' window. At the top, there are buttons for 'Delete', 'Clear', 'Cancel', 'Select All', 'Return To TRACS Main Menu', and 'Help'. Below these is a table with the following data:

Delete	ALC	Data File Type	Description	Date
Yes	N/A	R	Sample TRACS report for Documentation--Report to be Deleted	2001-07-25
No	N/A	R	Sample TRACS Report Summary with Detail	2001-07-25
No	12400001	R	Sample Summary with Detail Report for Documentation	2001-07-25
No	N/A	R	Sample TRACS Report for Documentation 60009301	2001-07-25
No	N/A	R	2nd Sample TRACS report - Summary with Detail 20180009	2001-07-25

At the bottom of the window, there are buttons for 'Delete', 'Clear', 'Cancel', 'Select All', 'Return To TRACS Main Menu', and 'Help'.

Figure 1.5 Flagged for Deletion

In Figure 1.5, the first report listed on the screen has been flagged for deletion. This flag can be changed at any time until the reports are actually deleted by the TRACS maintenance cycle. After you have marked the reports for deletion (changed deletion field to YES), click “Delete”. The confirmation screen shown in Figure 1.6 will display.

The screenshot shows a 'Purge Report Data Files Confirmation' dialog box. It contains two 'Yes' and 'No' buttons at the top. Below them is the question: 'Do you want the selected files flagged for deletion?'. At the bottom, there are two more 'Yes' and 'No' buttons.

Figure 1.6 Purge Report Data Files Confirmation

Confirmation Screen

If you click "No", none of the changes you entered on the most recent **TRACS - Report Retention Management** screen will be submitted. You will be returned to the **TRACS - Report Retention Management** screen (Figure 1.2).

Confirmation Requested

If you click "Yes", the changes to report deletion status you entered on the **TRACS - Report Retention Management screen** will be submitted to the TRACS database and those reports marked for deletion will be removed during the next regular database maintenance cycle (usually overnight). You will see the confirmation screen shown in Figure 1.7.

Confirmation Given

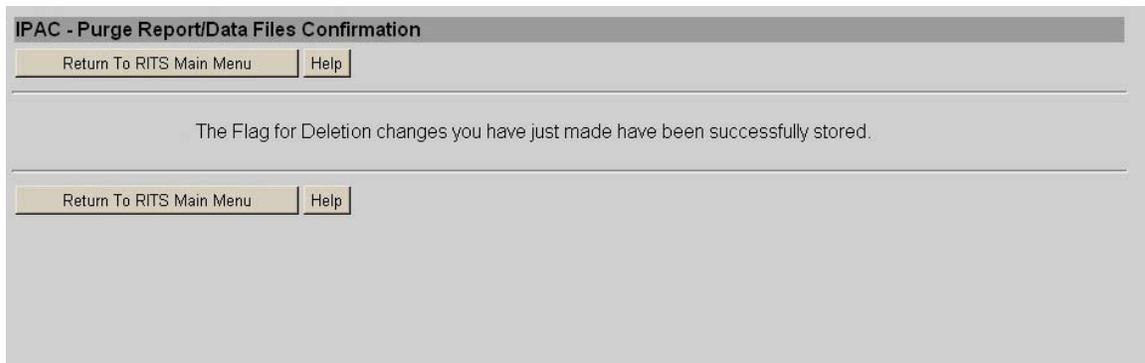


Figure 1.7 Purge Report/Data Files Completion Confirmation

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

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