

How to Mass Delete Documents Using a Smart Folder

Documents that have Retention Policies assigned to them can only be deleted by an Administrator or when the Retention Policy is met. In order to prevent inadvertently deleting documents that do not currently have a retention policy assigned, the following process is recommended to maintain documents in the archive until they are ready to be deleted.

 Add a Retention Policy to hold all documents within a given Application so that Document Types cannot be manually deleted by a User with the Delete permission. (We recommend 100 years from the Storage Date.)

Note: your Implementation Specialist may have already completed this step for you. If not, refer to this <u>article</u> to learn more about setting and managing retention in Identifi.

Retain at	least 100 years from Storage Date			
General	Document Types			
🗹 Edit				
	📴 Retain At Least	100	Years	•
	Retain At Most			
	From	(Storage Date)		•

 Using the "Clone" feature, create a "To Be Deleted" Document Type in each Application (i.e., "Delete – Customer," "Delete – Loan," "Delete – Deposit," etc.)

Note: your Implementation Specialist may have already completed this step for you. If not, refer to this <u>article</u> to learn more about Cloning a Document Type..

ACCOUNT INFORMATION SHEET								
General	Attributes	Applications	Security	Doc G				
Clone Document Type								
ACCOUNT INFORMATION SHEET								

Clone Document Type		×			
Enter the new document type display name and code. Then select whether or not the new document type should retain the attributes, security, retention policy and associated applications of the source document type.					
Display Name:	Code:				
Attributes Security Retention Applications Document Type Groups	If Retention is checked, only an Administrator can delete the document from the archive.	า			
	Cancel	ie			



 Create a Smart Folder to capture the Document Types that will need to be deleted (i.e., "Delete – Customer," "Delete – Loan," "Delete – Deposit," etc.).
 Note: : your Implementation Specialist may have already completed this step for you. If not, refer to this

Note: : your Implementation Specialist may have already completed this step for you. If not, refer to this <u>article/video</u>.

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Search Documents (?										
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1 Document	Decum DELETE - CUSTOME DELETE - DEPOSIT	Search KWYK	n Docul Search	ments 🕜		Q DEL	ETE - CUSTC) - ×		
Title	DELETE - I		🖶 Print	🛓 Download	Delete	Index 🗣	➡ Move	🗅 Smart Fe	older -	🖑 Rete
		1 Docun	nent Title					+ Add	w Smart Fo	lder on
Smart Folder - New Smart Fo	lder Sea	arch								
Display Name * To Be Deleted Documents								Public		

The Smart Folder can be Public or Private. If Public, visibility can be assigned to Users and/or Groups.

When a User renames the document to the "Deleted" Document Type (see <u>Step 4</u>, below), the document will fall into the Smart Folder and can be deleted (pending permissions).

Search Documents: (To Be Deleted Documents) (Private) (?)								
KWYK Search	Q	DELETE - CUSTO 👻 🗙						
Image: Construction Hold Image: Construction Hold Image: Construction Hold								
1 Document								
Title Application Document Type								
Image: Deposits Deposits DELETE - DEPOSIT								



Note: Subscribing to the Smart Folder initiates an email when new documents are added.

Smart Folders (?						
Subscribe						
1 Item						
Display Name						
✓ To Be Deleted Documents						

4. **Rename the Document** - When a Document Type is identified as eligible for deletion, Users with the "Index" Permission in the given Application (i.e., Customer/Deposit/Loan) will be able to rename the Document Type from its current Document Type name to the Document Type "Delete –[*Application*])

Note: We recommend the User also place a note on the document indicating the reason for deletion (pending permission).

r		
Index Notes Related	Info	
Edit Document Index Va	Index Notes	Related Info
Document Type	Document Type *	Index Notes Related Info
	DELETE - DEPOSIT	Save Index Value Changes
		Document Type * DELETE - DEPOSIT
If multiple documents are elig can multi-select documents f Document Search and use th button in the menu bar.	gible, the User from a e "Index"	Search Documents ③ KWYK Search Q SIGNATURE CARD - X Deposits -
		📰 🖶 Print 🛃 Download 🗇 Delete 🔍 Index 🖘 Move 🗅 Smart Folder 🗸 🦑

(See this <u>article</u> for more information on Mass Indexing.)

к	KWYK Search Q SIGNATURE CARD - X Deposits - X								
Image: Second system Image: Second system									
12 Documents									
		Title	Application						
	0	43021 SIGNATURE CARD 2021/02/16	Deposits						
	0	6578139561 SIGNATURE CARD 2021/11/09	Deposits						
	0	90824547 Smith, Robert E SIGNATURE CARD 2014/07/07	Deposits						