

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.

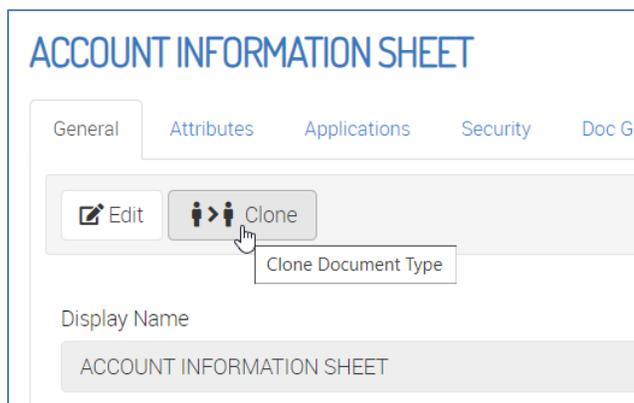
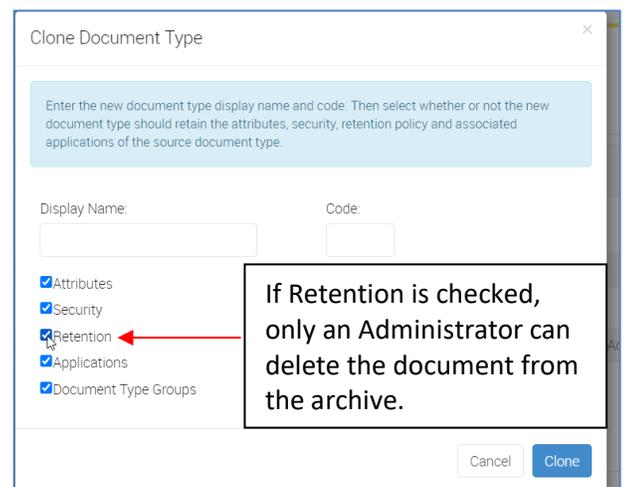
1. Add a **Retention Policy** to hold all documents within a given Application so that Document Types cannot be manually deleted by a User with the Delete permission. (We recommend 100 years from the Storage Date.)

Note: your Implementation Specialist may have already completed this step for you. If not, refer to this [article](#) to learn more about setting and managing retention in Identifi.



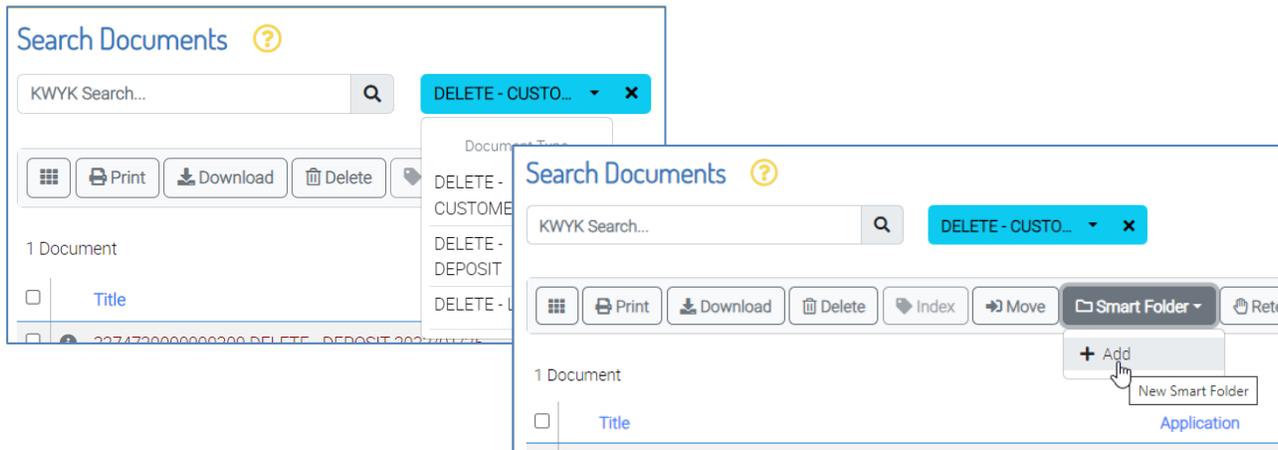
2. Using the “Clone” feature, create a “To Be Deleted” Document Type in each Application (i.e., “Delete – Customer,” “Delete – Loan,” “Delete – Deposit,” etc.)

Note: your Implementation Specialist may have already completed this step for you. If not, refer to this [article](#) to learn more about Cloning a Document Type..

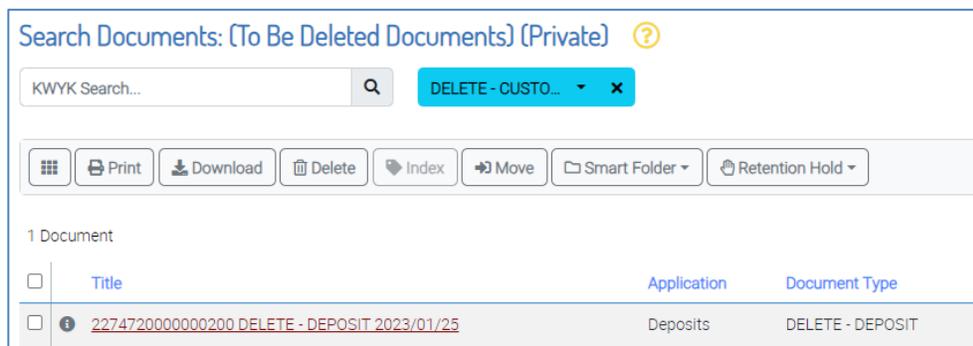
3. **Create a Smart Folder** to capture the Document Types that will need to be deleted (i.e., “Delete – Customer,” “Delete – Loan,” “Delete – Deposit,” etc.).

Note: : your Implementation Specialist may have already completed this step for you. If not, refer to this [article/video](#).

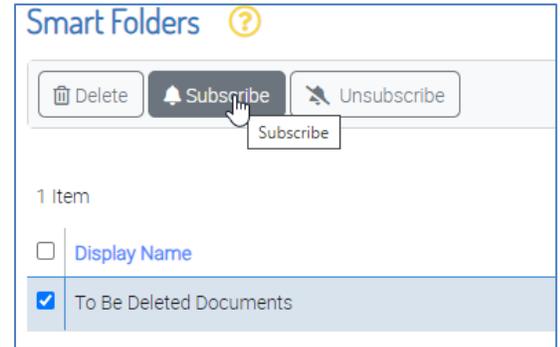


The Smart Folder can be Public or Private. If Public, visibility can be assigned to Users and/or Groups.

When a User renames the document to the “Deleted” Document Type (see [Step 4](#), below), the document will fall into the Smart Folder and can be deleted (pending permissions).

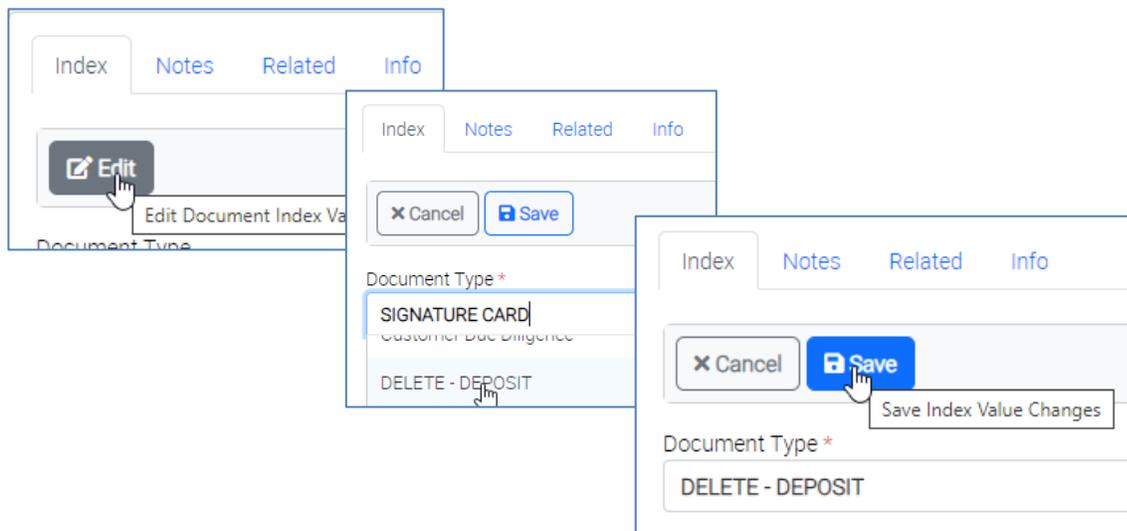


Note: Subscribing to the Smart Folder initiates an email when new documents are added.



- 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).



If multiple documents are eligible, the User can multi-select documents from a Document Search and use the "Index" button in the menu bar.

(See this [article](#) for more information on Mass Indexing.)

