

Issue/ New Feature	Data Retention (On Hold, Auto Email)
Client	AMC
Doctype	Data Retention
Test Site	http://osi-test.in:30305/
OSI PIC	Kashmir Karl Floranza
Date	12-11-2024
Result	PASSED

## Feature: Auto Email

- **Data Retention Set-Up** – input all the email recipients on the email recipients' table.

**Data Retention Setup** Menu Save

Employee termination

DC13  
E-mail box, personal folders, user accounts applications

Retention Period (Months)  
24

Commencement Term  
Employee termination

**EMAIL RECIPIENT**

	Email	
<input type="checkbox"/>	kashmir.floranza@opensoftsolutions.com	

Add Row

- **Data Retention Scan** – Start the Scanning.

**Data Retention Scan** Menu Save

Scan

Scan Date  
12-11-2024

- **Email Queue** – Check the email queue if the email has been sent.

**Email Queue** Menu

3ac7a12e17 Sent

Comments 0

ASSIGNED TO  
Assign +

ATTACHMENTS

Sender  
RA-PHMAK03-051@frieslandcampina.com

	Recipient	Status
1	kashmir.floranza@opensoftsolutions.com	Sent

- **Recipient Email** – Check the email of the recipient if its already received.

Data Retention Scan Complete

**R** RA-PHMAK03-051@frieslandcampina.com  
To kashmir.fioranza@opensoftsolutions.com

Reply Reply All Forward ...  
Wed 12/11/2024 1:51 PM

Data Retention Scan Complete

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**Note:** The email message is only a sample.

**Feature: On – Hold**

- **Scheduled for Deletion** – After Scanning, see the on-hold feature on the table per doc type

[Home](#) > [Setup](#)

Search or type a command (Ctrl + G)

[Administrator](#)
[Help](#)
99+

### Scheduled for Deletion

[Menu](#)
[Refresh](#)
[New](#)

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

ID

Add Filter

Last Modified On ▾

<input type="checkbox"/>	♥ Title	Status	20 of 384
<input type="checkbox"/>	♥ 17-0340 / 2024-12-05	●	cb8d2df187 2 d 0

17-0340 / 2024-12-05

cb8d2df187 [Menu](#) [Save](#)

Comments

0

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

♥ 0

You edited this

2 days ago

You created this

8 days ago

Scan Date

2024-12-05

Employee

17-0340

Status

<input type="checkbox"/>	Linked Doc	Category	Retention Period (M...	Commencement Term	On Hold	
<input type="checkbox"/>	1 Employee	E-mail box, personal f...	24	Employee termination	<input type="checkbox"/>	▾
<input type="checkbox"/>	2 LB Entry	Employee Information	24	Employee termination	✓	▾
<input type="checkbox"/>	3 Employee Movement	Employee Information	24	Employee termination	✓	▾
<input type="checkbox"/>	4 Employee	Employee Information	24	Employee termination	✓	▾
<input type="checkbox"/>	5 Loan Application	Employee Information	24	Employee termination	✓	▾
<input type="checkbox"/>	6 Work Suspension Apply	Employee Information	24	Employee termination	✓	▾
<input type="checkbox"/>	7 Employee	Personal Information	24	Employee termination	<input type="checkbox"/>	▾

Add Row

Please note that if a user applies the hold feature to a specific doctype, all doctypes with the same DC will automatically be put on hold.

- Schedule for deletion – after Deletion, Checked the on hold doctype if its not deleted after user use the hold feature.

Home > Setup > Scheduled for Del...

17-0340 / 2024-12-05

cb8d2df187 Menu Save

Comments 0

ASSIGNED TO Assign +

ATTACHMENTS Attach File +

TAGS Add a tag ...

You edited this 3 minutes ago

You created this 8 days ago

Scan Date 2024-12-05

Employee 17-0340

Status Deleted

	Linked Doc	Category	Retention Period (M...	Commencement Term	On Hold	
<input type="checkbox"/>	1 Employee	E-mail box, personal f...	24	Employee termination	<input type="checkbox"/>	
<input type="checkbox"/>	2 LB Entry	Employee Information	24	Employee termination	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	3 Employee Movement	Employee Information	24	Employee termination	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	4 Employee	Employee Information	24	Employee termination	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	5 Loan Application	Employee Information	24	Employee termination	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	6 Work Suspension Apply	Employee Information	24	Employee termination	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	7 Employee	Personal Information	24	Employee termination	<input type="checkbox"/>	

Add Row

- LB Entry

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On

<input type="checkbox"/>	♥	Name	Employee	Employee Name	Posting Date	1 of 1
<input type="checkbox"/>	♥	LBE12424	17-0340	DELA CRUZ, ANTHONY B...	09-28-2020	4 y 0

- Employee Movement

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On

<input type="checkbox"/>	♥	Movement Type	Status	Employee	1 of 1
<input type="checkbox"/>	♥	Resignation	Submitted	17-0340	EM2778 3 y 0

- Loan Application

Home > Payroll

Search or type a command (Ctrl + G)

Administrator Help 99+

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On

<input type="checkbox"/>	♥	Loan Type	Status	Employee	1 of 1
<input type="checkbox"/>	♥	Salary Advances	Active	17-0340	LOAN00000759 3 y 0