


TEST SCRIPT – Data Retention

Issue / New Feature	Data Retention
Doc Type	Data Retention
Test Site	Test Site 32050
DBTI PIC	Nathaniel Bobadilla
Date Validated	01-08-2025
Validation Status	PASSED

Feature: Auto Email

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

Data Retention Setup


Menu ▾
Save

<div style="background-color: #f2f2f2; padding: 2px; margin-bottom: 5px;">Visitor registration</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">0</div> <div style="margin-top: 10px;">Commencement Term</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Employee termination</div>					
<div style="background-color: #f2f2f2; padding: 2px; margin-bottom: 5px;">DC13</div> <div style="background-color: #f2f2f2; padding: 2px; margin-bottom: 5px;">E-mail box, personal folders, user accounts applications</div>	<div style="margin-top: 10px;">Retention Period (Months)</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">24</div> <div style="margin-top: 10px;">Commencement Term</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Employee termination</div>				
<div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;">EMAIL RECIPIENT</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30px;"></th> <th style="width: 70%;">Email</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>tbsi.nathan@gmail.com</td> </tr> </tbody> </table> <div style="margin-top: 5px; text-align: right;"> Add Row </div>			Email	1	tbsi.nathan@gmail.com
	Email				
1	tbsi.nathan@gmail.com				

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

Home > Setup

Search or type a command (Ctrl + G)

Administrator Help 99+

Data Retention Scan

Save

Scan

Scan Date

12-11-2024

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

Home > Setup > **Email Queue**

Search or type a command (Ctrl + G)

Administrator Help 99+

3ac7a12e17 **Sent**

Menu

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

RA-PHMAK03-051@frieslandcampina.com
To: kashmir.floranza@opensoftsolutions.com

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

Data Retention Scan Complete

Disclaimer: The information in this e-mail (including any attachments) is strictly confidential and may be legally privileged. If you are not the intended recipient of this message, please delete it including any attachments and immediately notify the sender. Any disclosure, copying, distribution or use either whole or partial of its contents is strictly prohibited except with formal approval. FrieslandCampina cannot guarantee that e-mail communications are secured and error-free and does not accept any liability for damages resulting from the use of e-mail. The general terms and conditions of [purchase](#) respectively [sale and delivery](#) of Royal FrieslandCampina N.V. are applicable to all transactions and undertakings resulting therefrom.

De informatie in deze e-mail (inclusief bijlagen) is strikt persoonlijk en vertrouwelijk en mogelijk juridisch geprivilegieerd. Indien u niet de bedoelde ontvanger van dit bericht bent verzoeken wij u het bericht inclusief bijlagen te vernietigen en ons hiervan onmiddellijk op de hoogte te stellen. Openbaarmaking, verspreiding of verspreiding van (een gedeelte van) dit bericht is, zonder formele toestemming, strikt verboden. FrieslandCampina kan niet garanderen dat e-mail communicatie veilig en foutloos is en aanvaardt geen enkele aansprakelijkheid voor schade voortvloeiende uit het gebruik hiervan. Op alle transacties en daaruit voortvloeiende verbintenissen zijn de algemene [aankoopvoorwaarden](#) respectievelijk [verkoopvoorwaarden](#) van Koninklijke FrieslandCampina N.V. van toepassing.

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**

Scheduled for Deletion

Menu

Refresh

New

Reports

List

Kanban

Assigned To Me

TAGS

No Tags

384

Q

ID

Add Filter

Last Modified On

☐

♥

Title

Status

20 of 384

☐

♥

17-0340 / 2024-12-05

●

cb8d2df187

2 d

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...

Search or type a command (Ctrl + G)

Administrator Help 99+

17-0340 / 2024-12-05

delete

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

0

You edited this 3 minutes ago

You created this 6 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"/>	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		

Add Row

- LB Entry

LB Entry

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

1

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On ▾

	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

Employee Movement

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

1

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On ▾

	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+

Loan Application

Menu Refresh New

Reports ▾

List

Kanban ▾

Assigned To Me

TAGS

No Tags

1

Show tags

ID

Add Filter Employee = "17-0340" ✕

Last Modified On ▾

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

DC 1: PERSONAL INFORMATION

Home > Setup > Scheduled for Del...

90-0166 / 2025-01-08

Linked Doc	Category	Retention Period (M...)	Commencement Term	On Hold
1 Employee	Email box, persona f...	24	Employee termination	
2 Employee	Employee Information	24	Employee termination	

Editing Row #3

Linked Doc: Employee

Category: Personal Information

Category Code: dc1

Fields: [birthday, birth_place, address, nationality, spouse, frn_contact, gender, age, religion, civil_status, profile_picture, blood_type]

[90-0166]

Retention Period (Months): 24

Commencement Term: Employee termination

☐ On Hold

Insert Below Insert Above

Add Row

Add a comment

Home > Employee Records > Employee

Search or type a command (Ctrl + G)

Administrator Help 99+

90-0166 Menu Save

PLATA JR, MAXIMINO PILI

110887177 Table 0 Both

RDO Code

BANK

Bank Name	Bank Type	Bank Account	Account Type	Branch Code
1 BPI	Savings	SA3219143612	Primary	

Add Row

PERSONAL INFO

Birth Place

Civil Status

Religion

Spouse

Nationality

☐ Is Solo Parent

☐ Is Widowed

Blood Type

DC2: CONTACT INFORMATION

17-0347 / 2025-01-08

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

0

You edited this 13 hours ago

You created this 13 hours ago

Scan Date
2025-01-08

Employee
17-0347

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 Employee	Employment informat...	120	Employee termination	<input type="checkbox"/>	▼

Editing Row #3

Linked Doc
Family Members

Category
Emergency Contact

Category Code
dc2

Fields
All

Preview
[7e44ebaf24]

Retention Period (Months)
1

Commencement Term
Employee termination

☐ On Hold

TENG, JERON ALVIN UY

17-0347

Menu Save

catholic

Nationality
filipino

Blood Type
A-

☐ Is Solo Parent

☐ Is Widowed

CONTACT DETAILS

PASSPORT

FAMILY INFO

<input type="checkbox"/>	Full Name	Birthday	Relationship	Is Dep...
<input type="checkbox"/>	test	02-02-2000	Father	

Editing Row #1

Full Name
test

Birthday
02-02-2000

Relationship
Father

Contact No
09999999999

☐ Is Dependent

☐ Is PWD

☐ Adult

☐ Is Qualified Dependent

Ctrl + Up, Ctrl + Down, ESC

Insert Below

Add Row

DC 3: EMPLOYEE INFORMATION

Home > Setup > Scheduled for Del...

Search or type a command (Ctrl + G) Administrator Help 99+

17-0347 / 2025-01-07 Deleted ce86a3ba24 Menu Save

You created this 7 hours ago

4	Employee	Employee Information	24	Employee termination
Editing Row #5				
<p>Linked Doc</p> <p>Loan Application</p> <p>Category</p> <p>Employee Information</p> <p>Category Code</p> <p>dc3</p> <p>Fields</p> <p>All</p> <p>Preview</p> <p>[LOAN00000602; LOAN00001061]</p> <p>Retention Period (Months)</p> <p>24</p> <p>Commencement Term</p> <p>Employee termination</p>				

Ctrl + Up, Ctrl + Down, ESC Insert Below

Home > Setup > Deleted Document

Search or type a command (Ctrl + G) Administrator Help

LOAN00001061 616bf07a00 M

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

0

Administrator edited this 7 hours ago

You created this 7 hours ago

Deleted DocType

Loan Application

Data

```
{
  "_assign": null,
  "_comments": null,
  "_liked_by": null,
  "_user_tags": null,
  "amended_from": null,
  "amortization": 16619.32,
  "beginning_balance": 59829.55,
  "company": "Alaska Milk Corporation",
  "creation": "2020-10-03 13:18:18.693982",
  "docstatus": 1,
  "doctype": "Loan Application",
  "employee": "17-0347",
  "employee_name": "TENG, JERON ALVIN UY",
  "first_date": 0,
}
```

LB ENTRY

Home > Setup > Scheduled for Del...

Search or type a command (Ctrl + G)

Administrator Help 99+

92-0098 / 2025-01-08

0ce211284d Menu Save

You created this 16 hours ago

Editing Row #4

Insert Below Insert Above

Linked Doc

LB Entry

Category

Employee Information

Category Code

dc3

Fields

All

Preview

[LBE08363, 'LBE09332', 'LBE10266', 'LBE12674', 'LBE18714', 'LBE22436', 'LBE23535', 'LBE24640', 'LBE25738', 'LBE26831', 'LBE27923', 'LBE28995', 'LBE34430', 'LBE43876', 'LBE44892']

Retention Period (Months)

24

Commencement Term

Employee termination

☐ On Hold

Ctrl + Up, Ctrl + Down, ESC

Insert Below

EMPLOYEE MOVEMENT

Home > Setup > Scheduled for Del...

Search or type a command (Ctrl + G)

Administrator Help 99+

92-0098 / 2025-01-08

0ce211284d Menu Save

Editing Row #5

Insert Below Insert Above

Linked Doc

Employee Movement

Category

Employee Information

Category Code

dc3

Fields

All

Preview

[EM1153, 'EM2133', 'EM2439']

Retention Period (Months)

24

Commencement Term

Employee termination

☐ On Hold

DC4: EMPLOYMENT INFORMATION

17-0347 / 2025-01-08

Sca328b80f Menu Save

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag ...

0

You edited this
13 hours ago

You created this
13 hours ago

Scan Date
2025-01-08

Employee
17-0347

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	

Editing Row #2

Insert Below Insert Above

Linked Doc
Employee

Category
Employment information

Category Code
dc4

Fields
All fields

Preview
[17-0347]

Retention Period (Months)
120

Commencement Term
Employee termination

☐ On Hold

ctrl + up, ctrl + down, ESC

Insert Below

TENG, JERON ALVIN UY

17-0347

MenuSaveComments
0ASSIGNED TO
Assign +ATTACHMENTS
Attach File +TAGS
Add a tag ...

0

You edited this
15 hours agoYou created this
4 years agoMiddle Name
UYFull Name
TENG, JERON ALVIN UYBirthday
01-01-1001Age
1024Biometrics ID
170347

Global ID

Gender
Other

Suffix

Maiden Name

Email

Role
Timekeeper Applications

User ID

EBANI PUBLISHER INC.

DTRP APPLICATION

Home > Setup > Scheduled for Del...

92-0098 / 2025-01-01

You created this 16 hours ago

Editing Row #3

Linked Doc

DTR Problem Application

Category

Employee Information

Category Code

dc3

Fields

All

Preview

['DTR00000464', 'DTR00000465', 'DTR00000504', 'DTR00000505', 'DTR00000699', 'DTR00000954', 'DTR00002004', 'DTR00002098', 'DTR00002229', 'DTR00002230', 'DTR00002451', 'DTR00002452', 'DTR00002462', 'DTR00004619', 'DTR00004659', 'DTR00005738', 'DTR00007131', 'DTR00007502', 'DTR00007707', 'DTR00007920', 'DTR00009134', 'DTR00009135', 'DTR00009182', 'DTR00009720', 'DTR00009770', 'DTR00009805', 'DTR00014573', 'DTR00017476']

Retention Period (Months)

24

Commencement Term

Employee termination

☐ On Hold

DC13: E-mail Box

Home > Setup > Scheduled for Del...

17-0347 / 2025-01-07 Deleted

ce86a3ba24

Menu Save

Add a tag ...

0

You edited this 4 minutes ago

You created this 7 hours ago

Editing Row #1

Linked Doc

Employee

Category

E-mail box, personal folders, user accounts applications

Category Code

dc13

Fields

['user_id', 'email']

Preview

[17-0347]

Retention Period (Months)

24


Commencement Term

Employee termination

Ctrl + Up, Ctrl + Down, ESC

Insert Below

TENG, JERON ALVIN UY

17-0347  Menu ▾ Save

ASSIGNED TO

Assign +

ATTACHMENTS

Attach File +

TAGS

Add a tag ...

 0

You edited this
7 hours ago

You created this
4 years ago

UY

Full Name

TENG, JERON ALVIN UY

Birthday

01-01-1001

Age

1024

Biometrics ID

170347

Global ID

Gender

Other

Suffix

Maiden Name

Email

Role

User ID