User Guide

NTS Retention Toolbar

Edition 1.0 (Sep. 2000)

Printed in U.S.A.

000930

© Copyright:

Description:

The NTS Retention Toolbar program is created as an extension of the OTG Application Xtender Imaging program. The main function of the NTS Retention Toolbar is to add Retention Scheduling to the AX.

The program can be run in one of two ways as a standalone application, that will load and control AX, regarding removing older documents from the imaging database. Or it can run from the AX script toolbar.

Running from the AX script toolbar will load the NTS Retention Toolbar when AX is loaded. The NTS Retention Toolbar will check its internal scheduler to see when next update should be run. If the computer date and time is past the requested update time it will ask the user permission to start the update. The user can accept the request or cancel. If cancel or no update is requested the NTS Retention toolbar will automatically remove it self from the session of running AX. Next action will take place when the AX is reloaded.

The NTS Retention Toolbar will under update do the following: Run a query for records that have empty retention dates. The found records will be updated per the retention schedule field. The second query is to locate records that are older than the calculated retention date. The records found will be deleted from the AX database including the images stored in database volume path. Records that are deleted will be recorded in the daily log file.

How2:

The following is a quick outline on how to create retention schedules in OTG AX 4,1 and higher with the help of the NTSRSAX extension program.

In addition to the user defined fields the AX application should also include the following three fields: Doc Date, Retention Schedule, and Retention Date.

Note: *It is important that the three fields are the last three fields and in this order.*

Note: *It is important that the three fields are the last three fields and in this order.*

Fig 1. Doc Date field configuration. The Doc Date is the date from which the retention is calculated. This field is required and has to be manually indexed by the user.
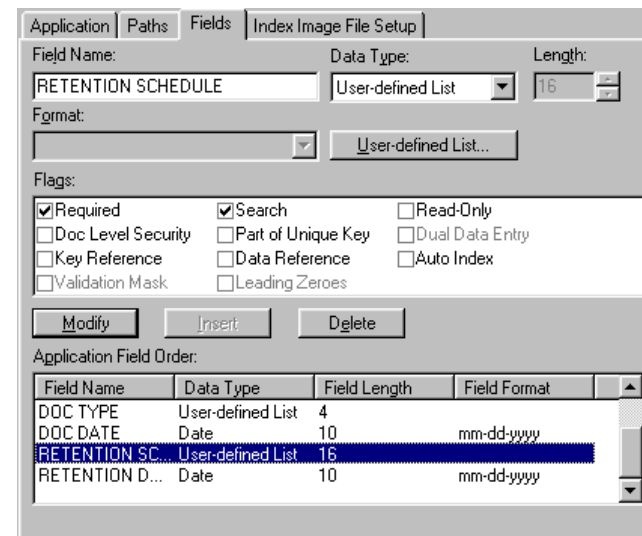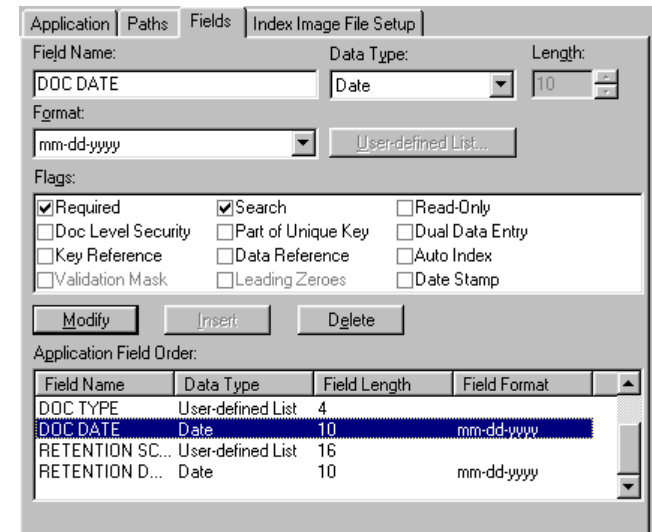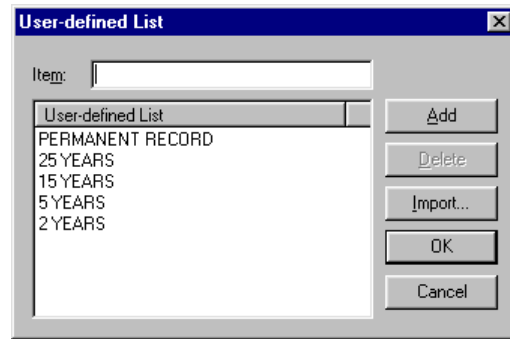

Fig 2. Retention Schedule field configuration. The NTSRSAX program calculates the Retention Date uses the Retention Schedule User Defined List and the date in the Doc Date field. The user will under document indexing enter a Doc Date and select one of the options from the User Defined List.

Fig 3. User-defined Retention Schedule list. The list needs to include the option of "Permanent Record" and one or more year options. Any year options should start with the year count and a space before the following text (charters).

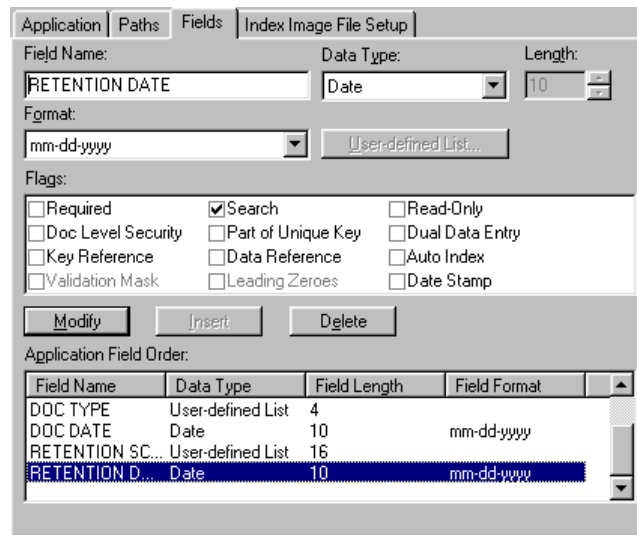**NOTE**: *This list should be duplicated in the NTSRSAX configuration.*

Fig 4. Retention Date field configuration.
The Retention Date is calculated by the NTSRSAX program and should not be used by the user at any time.
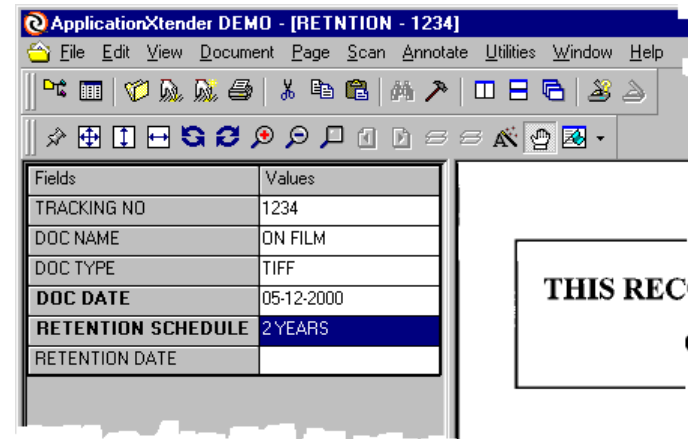
Fig 5. Indexing. The user will enter the index information in the first couple of fields like under normal use, in this case the Tracking No, Doc Name, and the Doc type. The three first fields have nothing to do with the actual Retention Schedule for the document.

In the Doc Date field the user will enter the date from which the retention should be calculated. If this record where a document lets say used in Human Resource the date could start with today's date and the Retention Schedule would be "Permanent Record" since it is an active document. When the file becomes inactive the user will change the Doc Date to the current date and select the correct Retention Schedule per the drop down user defined list (see fig 3).

The Retention Schedule field controls the way the NTSRSAX program will automatically calculate the Retention Date using the Doc Date and the selected Retention Schedule.

NOTE: The user will never index or change the Retention Date. This is a date calculated by the NTSRSAX program and should stay intact.

The NTSRSAX can either be started ad-hoc by the user or started by the AX Script. If started by ad-hoc this dialog box will be shown if it is time to run the Retention Schedule. If the NTSRSAX program is started by the AX Script, and it is time to run the Retention Scheduler the user will see the following dialog box generated by the AX Script.
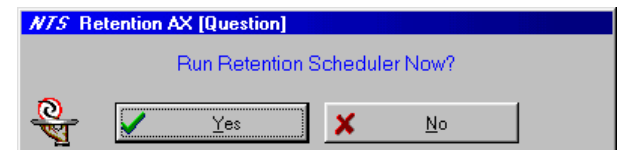
If none of the dialog boxes are displayed the user can always start the Retention Scheduler using the second speed button "Start" on the Retention Tool Bar.
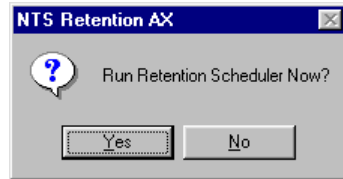
If the Retention Scheduler is started using one of the above option the following will happen:

The Application selected in setup will be queried for any new records that have a Retention Schedule (meaning that "Permanent Record" is not selected) but no Retention Date. After the records has been update with the correct Retention Date the program will query all the record that has a Retention Date that is older then today's date.

Fig 6. First query to update the Retention Date.
This Query will be executed to find Records where the Retention Schedule is not "Permanent Record" and the Retention Date is empty.

All records that are found with this Query will be updated with a calculated Retention Date.

Fig 7. Updated Index information.
Index information on a record that has re-calculated the Retention Date.

When all the records found in the first Query has been updated with the calculated Retention Date the NTSRSAX program will execute a second Query:

Fig 8. Second Query to locate "old" records.
This Query will find Records where the Retention Date is older than today's date and the Retention Schedule is not "Permanent Record".

All records that are found with this Query will be logged in the log file before purged of the system.

Fig 9. Updated Index information.
Index information on a record that will be purge from the system since the Retention Date is older than today's (May 12, 2000) date.

When a record is purged from the system both the index information and the images will be deleted. The Log file will include information about recalculated Retention Dates and Delete records.

NTS Retention AX:

The NTS Retention AX program is a COM module designed as a floating toolbar.

The NTSRSAX program has three speed buttons, and one right click popup menu.

The Exit button is enabled when started as a stand-alone application, or grayed-out if started via COM from the AX script.

The Start button will test the AX application as outlined in the How2 chapter.

The About button will display the standard copyright notice, including serial number and build version.

The Help button will display the Retention.Pdf file.

The right click popup menu will bring up the Setup dialog box.

The Schedule tab lets the user configuring the next Action Data and Time, and the Interval between the Actions.
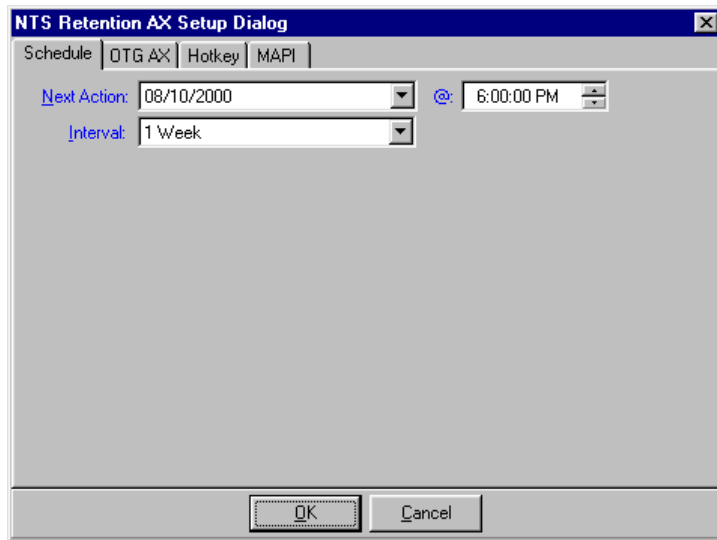

The Next Action date is calculated from the current date, so if the Action date is 07/31/2000 and the current date is 8/3/2000 the Next Action will be 8/10/2000 if the interval is set to 1 Week.

Setting the interval should be done before actual using the program.

The OTG AX tab controls the interface to the AX program.

Server name should only be changes if OTG changes the AX Server name.
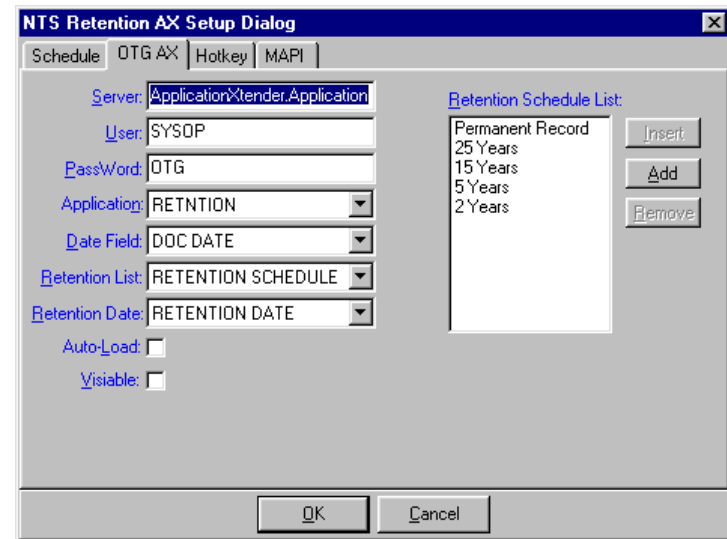
User name and Password should be set to the users declared name and password.

With the Application you can select which application to monitor. When changed, the Date Field, Retention List, Retention Date fields name will be updated per the AX application.

Auto-Load and Visible can be set per requested action. In general both should be un-selected.

It is important that the Retention Schedule List is setup equal to the setting in the AX application. Use the Insert, Add, and Removed buttons to create and edit the list.

NTS Retention AX Setup Dialog

Schedule | OTG AX | Hotkey | MAPI

Start: {Alt} ▼ {F7} ▼

OK   Cancel
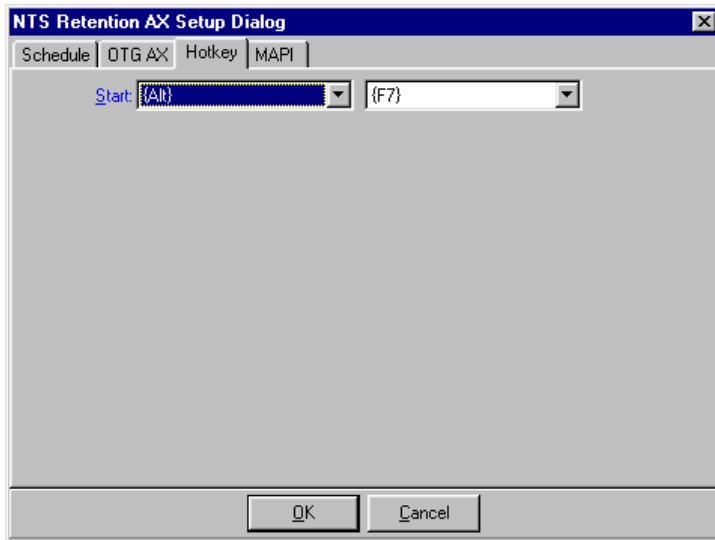
From the Hotkey tab you can change the global hot key to start the action. Use the pull down combo boxes to change the Key and the Key combination for the Hotkey.

NTS Retention AX Setup Dialog

Schedule | OTG AX | Hotkey | MAPI

PassWord:
Profile:
Use Default: ☑

OK   Cancel
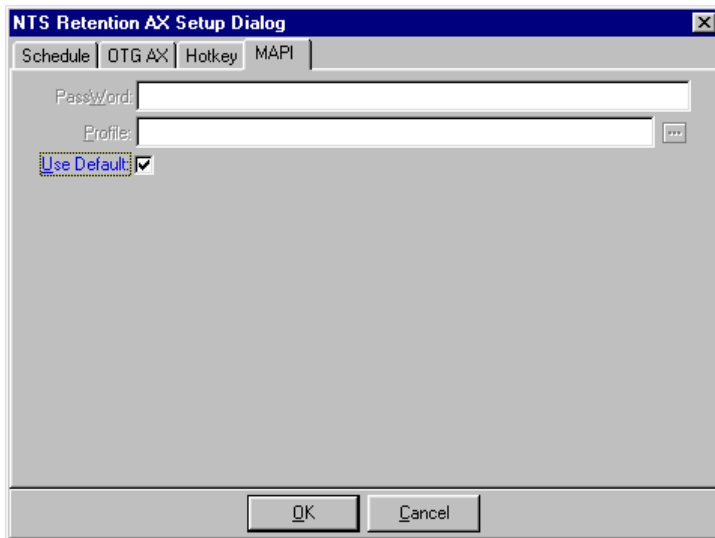
The last tab the MAPI tab is been supplied to give the user a connection between the NTSRSAX program and the current MAPI installation. MAPI is used for registration.

Installation:

The NTS Retention Schedule program disk includes an automatic installation and removal program to make it easier to install or remove the software.

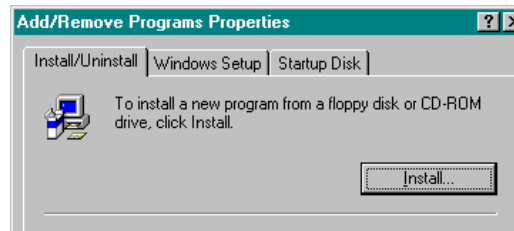To install the NTS Retention Schedule program you must be running Windows 95, 98, ME, NT or Windows 2000.

It is always recommended to backup your computer hard disk before installing any new program.

Control Panel

File Edit View Help

Accessibility Options | Add New Hardware | Add/Remove Programs
Fonts | Internet | Keyboard

Any currently running window applications should be closed before starting the installation program.

From the Windows Task Bar's Start button, select the Settings | Control Panel to show the Windows Control Panel window.

Double click on the Add / Remove Programs Icon to run the Windows Add / Remove Program Properties application.

Add/Remove Programs Properties

Install/Uninstall | Windows Setup | Startup Disk

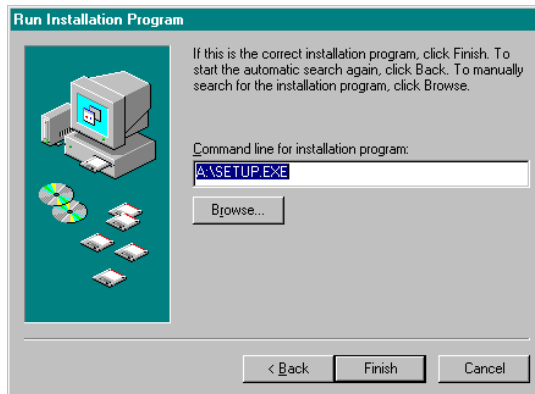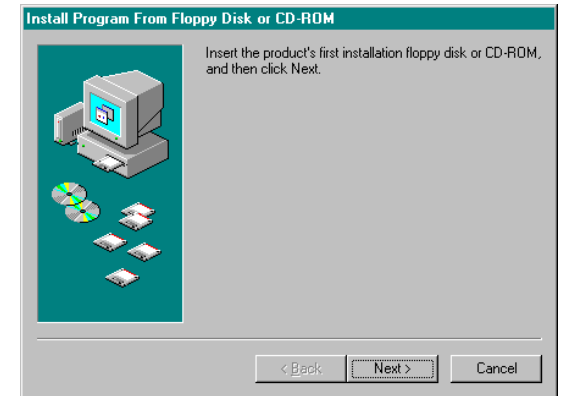To install a new program from a floppy disk or CD-ROM drive, click Install.

Install...

To start the installation program click the Install button.

The following 9 steps will complete the full installation.

Install Program From Floppy Disk or CD-ROM

Insert the product's first installation floppy disk or CD-ROM, and then click Next.
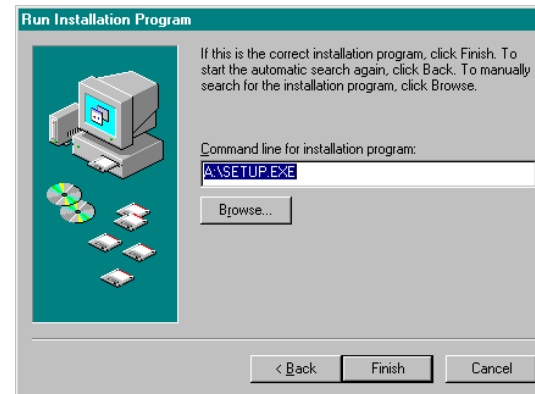
< Back   Next >   Cancel

Step 1 gets the installation program ready to locate the installation disk. Insert the product floppy disk into your floppy drive and click next,
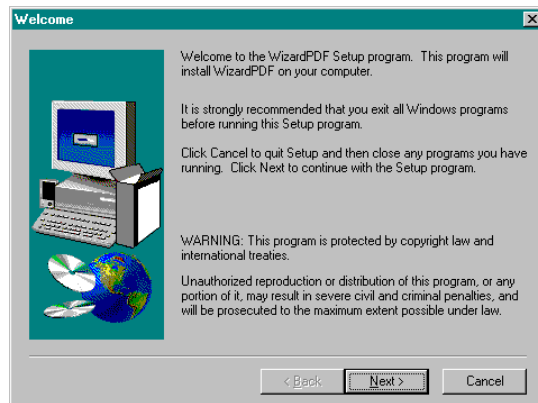
Run Installation Program

If this is the correct installation program, click Finish. To start the automatic search again, click Back. To manually search for the installation program, click Browse.

Command line for installation program:

A:\SETUP.EXE
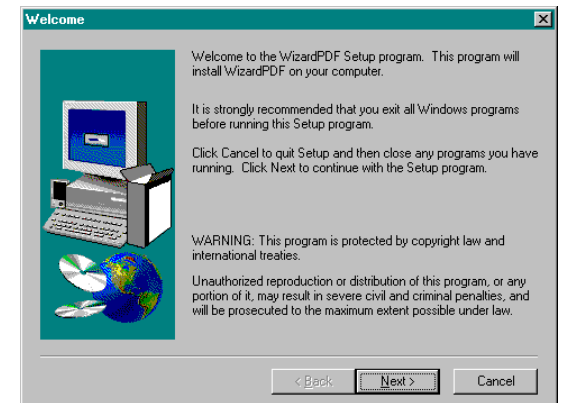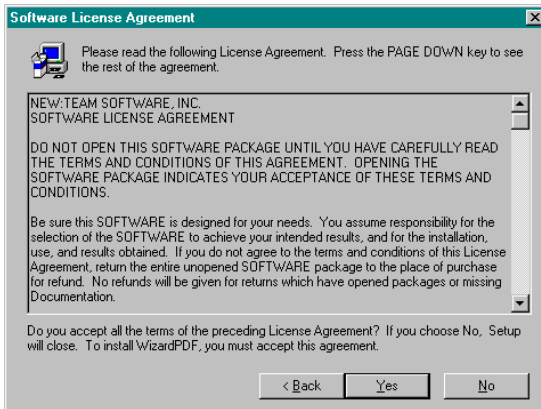
Browse...

< Back   Finish   Cancel

In Step 2 the installation program wants you to OK the source drive and path for the product disk. Click the Finish button to continue.

Step 3 gives you the last change to exit any currently running window applications before the installation programs start reading and writing to the hard disk. When ready click the Next button.

Welcome

Welcome to the WizardPDF Setup program. This program will install WizardPDF on your computer.

It is strongly recommended that you exit all Windows programs before running this Setup program.

Click Cancel to quit Setup and then close any programs you have running. Click Next to continue with the Setup program.

WARNING: This program is protected by copyright law and international treaties.

Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under law.

< Back   Next >   Cancel

In Step 4 we want you to take a minute to read our Software License Agreement. When you click the Yes button to continue, you will also have agree to the terms, so please read before clicking.

In Step 7 the installation program want to create a special folder for the product. You can select to use the defaulted name, select another name, or use an already created folder. When ready click the Next button.
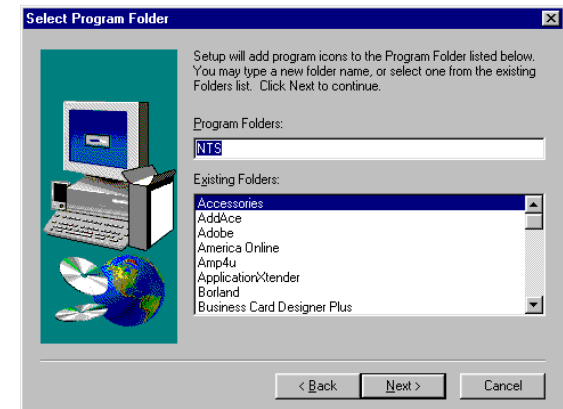

Step 5. Enter or correct your name and company name for registration purpose.

Before you can continue, please enter the six-digit serial number found on the back of your User Guide.
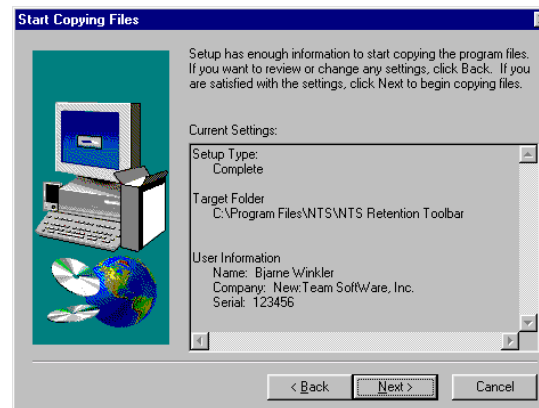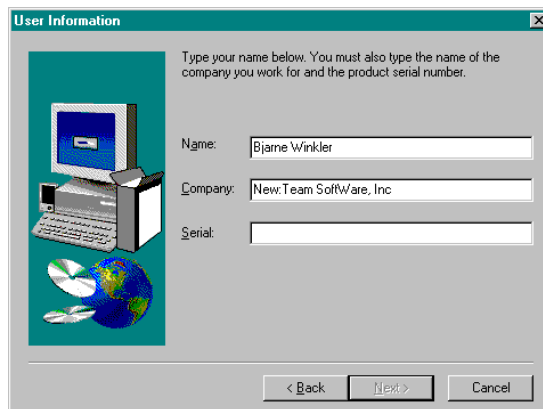
Step 8. Before the physical installation, the installation program lets you review the current setting. This is the time to correct any information that is not correct. Check that the serial number is correct. Click the Next button for the final step.
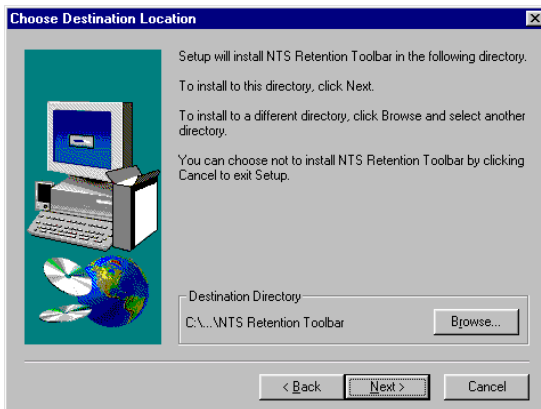
In Step 6 you can select another than the defaulted drive and directory for the destination drive and folder.

In Step 9 you can test run the NTS PDF Wizard to confirm that the installation was gone correctly.

See Uninstall for removal of the program if needed.
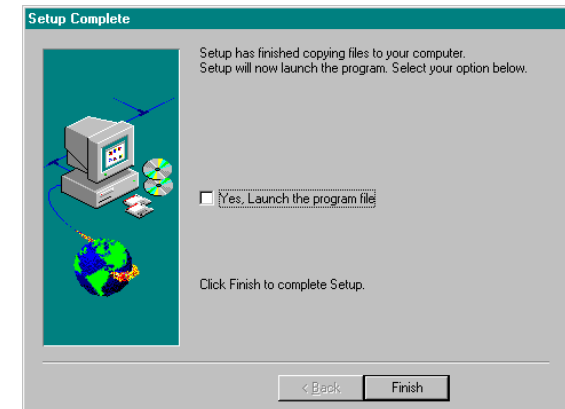
Uninstall:

The NTS Retention Schedule program disk includes an automatic installation and removal program to make it easier to install or remove the software.

To install the NTS Retention Schedule program you must be running Windows 95, 98, ME, NT or Windows 2000.

It is always recommended to backup your computer hard disk before removing any new program.

Any currently running window applications should be closed before starting removing the program.

From the Windows Task Bar's Start button, select the Settings | Control Panel to show the Windows Control Panel window.

Double click on the Add / Remove Programs Icon to run the Windows Add / Remove Program Properties application.
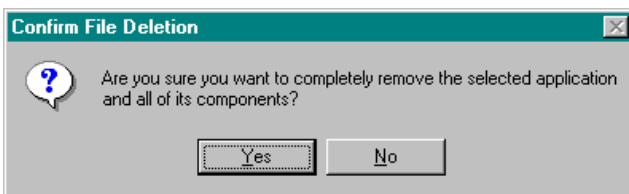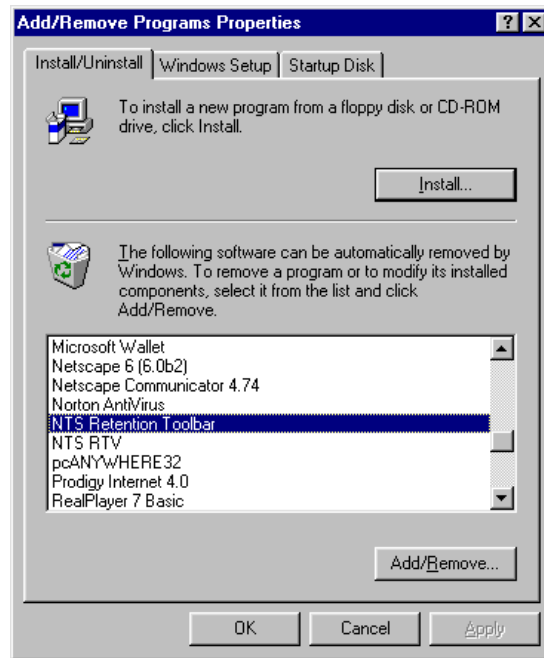

Highlight the NTS Retention Toolbar entry and click the Add/Remove button. Confirm that you want to remove the selected item.

AX Script:

To configure the NTS Retention Toolbar to be a part of the AX Script Toolbar you will need to manually copy the AEX32.txt (AX Script) file from the NTS Retention folder to the folder where AEX32.Exe is located (Default currently is C:\AX41).

This error message can be displayed after you have copied the AEX32.txt file into the AX folder and starting AX. The reason for this error is that the NTS Retention Toolbar program has not been registered correctly in the Registry.
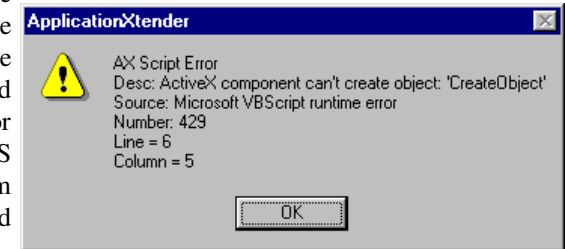
To fix the reported Script Error do the following 4 steps:

➢ Exit AX
➢ Run the NTSRSAX.Exe program so it can register it self
➢ Exit NTS Retention progem
➢ Run AX, and this time you should not see the error

The following Script should be included in the AX home folder with the file name of Aex32.txt.

This script will load the NTSRSAX COM module. If the Schedule information returned from the COM Object the program is due to run the Retention Scheduler. The user will be prompted to accept to run the Retention Scheduler. If the user select to do so the Script will start the Retention Scheduler.

Technical Support:

New:Team SoftWare is committed to give you technical support at a low or no cost rate. The way we can offer this without increasing the cost of our software is to offer what we call: **"The Golden Gate Principle".**
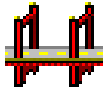
When you need to cross the Golden Gate Bridge you pay a toll. The same goes for the technical support, you pay for the phone call and we supply the technical information for free. Before calling for technical support, please consult the Help screens, the Write files, and the NTS-READ.ME file on the product diskette. If the information in these sources does not solve your problem, please contact our technical support staff by one of the methods described below.

By phone, at: (415) 461 - 8086. When you call please have the following information ready for us and be in a position where you can both talk on the phone and use the computer at the same time. We need to know the serial number of the software, the environment that you are running under, and the problem that you have encountered.

By e-mail, or fax at: nts4618086@aol.com or 415-461-1891. For some user it is easier to e-mail or fax the questions to us. If this is a better way for you please remember to include the serial number, the environment, and a printout of the current used INI file. We will then within 24 hours e-mail or fax you back a solution to the problem that you have described.

By mail, at: **New:Team SoftWare, Inc.**
Attn.: Technical Support
1400 Lincoln Village, # 2331
Larkspur, CA 94939-2206 USA

The Green Page:

New:Team SoftWare is committed to the rain forest!

As a software publisher and writer, we where shocked to discover that our rain forests, homes for half of all living things on earth, are being destroyed at the rate of 50 acres per minute.

At this rate the rain forests will completely disappear in just 50 years. Books and manuals have a large influence on this rampant destruction.

For example, since it takes 17 trees to produce one ton of paper, a printing of 1000 copies of a typical 480-page book or manual consumes 3600 pounds of paper that will require 30 trees.

To help this loss, we at New:Team SoftWare will try to use a minimum amount of paper, if there is another way of producing our product.

On-line documentation has several features:

No, or very little use of paper.
Help information is always ready when you need it.
Easy to keep updated.
Can still be printed if absolutely needed.
Can be annotated like paper.
Fax / E-mail not mail:
90% of all our mail are produced in electronic
form and faxed / E-mailed directly without printing first.
If the receiver has a fax cards in the computer, or has an e-mail address,
the receiver will be able to also avoid paper printing.

Please help us in support of the rain forest.

An USA created and produced product.