Data cleanup

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F2 Data Cleanup

The F2 Data Cleanup module addresses the various needs of organisations with regard to cleaning and deleting data. Data protection legislation requires that organisations define deletion policies that guide the storage and deletion of data, including personal data. Organisations may need to clean up cases that have been transferred to a different F2 system, such as cases that have been locked and delivered to the Danish National Archives. Additionally, organisations may need to clean up erroneously created cases or records.

The module's cleanup tools assist in data maintenance - that is, the module provides organisations with the overview and deletion functionality they need by helping them generate lists of cases and records within the installation that may be ready for deletion.

F2 Data Cleanup consists of cleaning tools that support the organisation's regular case cleanup without dictating their deletion policy. The tools are designed for large-scale, regular cleanup tasks based on lists which provide an up-to-date overview of cases ready for cleanup. Their design focuses on cleaning and, if necessary, deleting large numbers of cases or records simultaneously based on relevant predetermined parameters such as disposal codes and keywords. Any singular cases or records, e.g. a duplicate created by mistake, are better deleted via the case, record, or main window respectively.

Users who are given access to data cleanup can view a range of metadata to evaluate whether a case or record is ready for deletion. This includes predetermined personal data of involved participants as well as metadata of cases and records such as the responsible user or unit, keywords, disposal codes, and file plans. The module does not offer access to the contents of records or their attached documents, ensuring that users who do the cleaning do not gain unnecessary access to sensitive data.

Access to data cleanup offers additional details on data access, while potential security concerns are addressed below. A description of how to access the cleanup tools is followed by Manage cleanup searches, which contains a guide to working with cleanup searches and cleanup lists. Finally, Cleaning with cleanup lists presents the actual cleanup tasks and their associated supported methods of documentation.

Security concerns

Users with access to data cleanup potentially gain access to a range of metadata on all records and cases in the F2 installation in addition to the rights to delete these records and cases permanently.

NOTE	Users can gain the rights to view titles, responsible users, keywords, and other metadata of records and cases. The cleanup tools will never grant access to record contents that the user did not have already. This applies to both record documents and documents attached to the records.

Because of the potentially expanded access, the module offers both a standard role and a privilege which should be assigned to users with the utmost caution. The cleanup tools contain built-in documentation options to meet security and supervision requirements, enabling users to frequently and automatically create reports on the deleted data and the reason for deletion.

The act of deleting data is documented in F2’s database. This documentation cannot be deleted, and said documentation can be extracted with the F2 Analytics module.

Access to data cleanup

Users can gain access to F2 Data Cleanup in two ways: through a standard role and through a privilege. The organisation's structure and internal policies regarding cleanup and deletion determine how these should be assigned. The two types of access are as follows:

- The "Access to data cleanup" standard role grants rights to view and delete all records and cases in the F2 installation that match a cleanup search regardless of the user's regular access to the cases and their records. This includes cases and records otherwise protected from deletion due to their registration status or similar.
- The "Limited access to data cleanup" privilege grants the rights to manage and delete records and cases to which the user already has write access. This excludes cases with registered records or other regular protections against deletion. Users with the privilege will be able to view but not delete cases to which they have read access.

Users across the installation with either the "Access to data cleanup" standard role or the "Limited access to data cleanup" privilege have access to the same cleanup searches. However, the searches will yield different results, i.e. different cleanup lists, for users with the role and for each user with the privilege. This is because the result lists for users with the privilege are determined by record access levels, access restrictions, and similar metadata. Only users with either the standard role or the privilege can view the installation's cleanup searches.

The graph below illustrates the two types of access. This may create an overlap between the cases different users have the rights to clean up, and their cleanup work may affect one another.

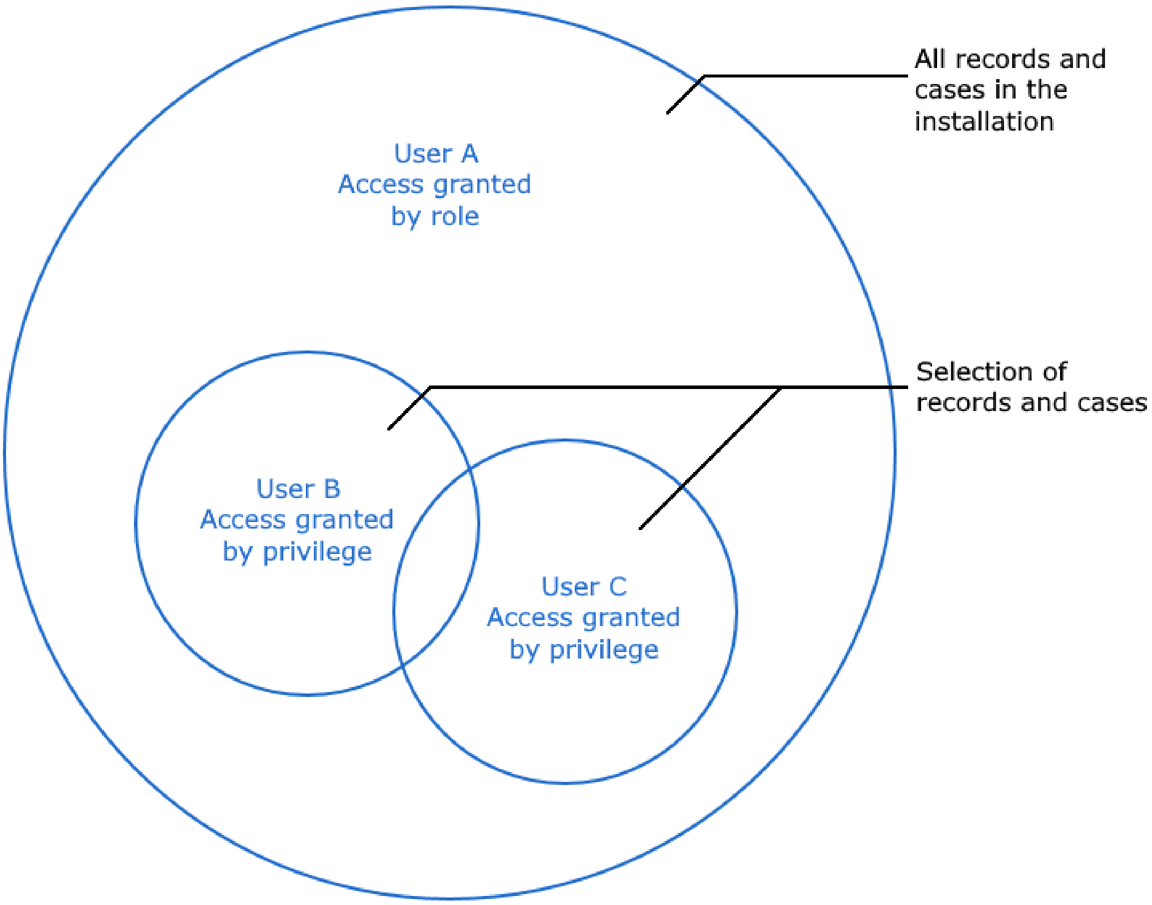


Figure 1. How cleanup list vary between users

The role is assigned by a user with the “User administrator” privilege, and the privilege by a user with the “Privilege administrator” privilege.

Manage cleanup searches

The majority of cleanup work is done in the “Data cleanup” window. The organisation’s searches are created, managed, and deleted from this window. Open the window via the main window’s “Settings” tab by clicking the **Data cleanup** menu item.

Figure 2. The “Data cleanup” icon

The window’s layout is displayed below.

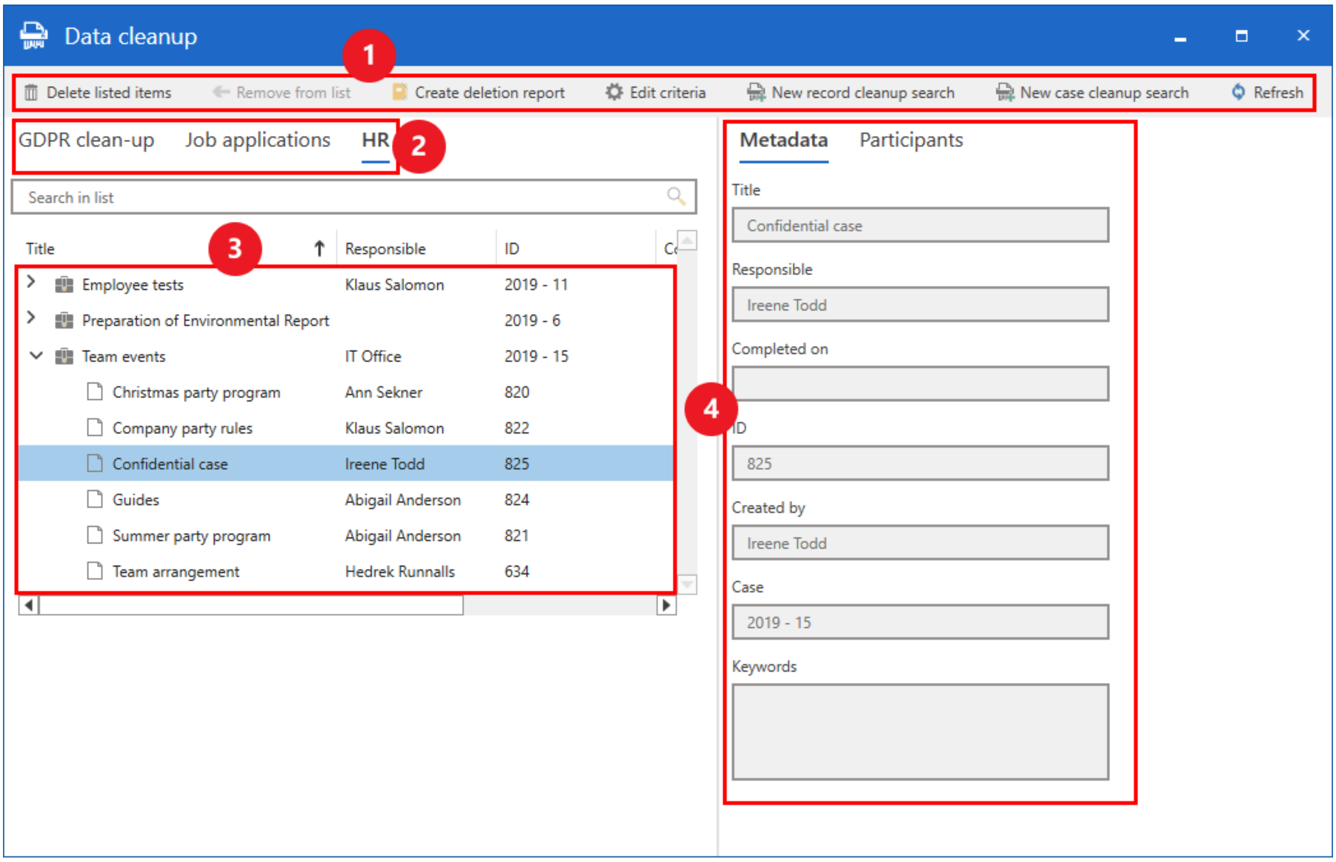


Figure 3. Layout of the “Data cleanup” window

The layout consists of the following elements:

- A ribbon (1).
- All available cleanup searches (2).
- The generated cleanup list (3).
- A preview of the element currently selected in the list (4).

The ribbon contains the following menu items:

Function	Description
Delete listed items	Delete all cases and records in the cleanup list. Read more about deleting list contents.
Remove from list	Temporarily remove the selected case from the list. Read more about reviewing list contents.
Create deletion report	Generate a PDF report detailing all records and cases on the list. The report serves as a foundation for preliminary cleanup work before deletion. A report can also be generated as part of the actual deletion, but its contents differs slightly. Read more about cleanup reports.
Edit criteria	Open the "Edit criteria" dialogue to edit the cleanup search criteria. It is also possible to delete the search in the dialogue.
New record cleanup search New case cleanup search	Create a new cleanup search. You can create a record cleanup search or a case cleanup search.
Refresh	Refresh the result list for the selected cleanup search. The function helps keep the list up to date as other users may affect its contents by updating case metadata or doing cleanup work.

Below the ribbon the installation's cleanup searches are sorted chronologically by creation date. Click a search to generate a cleanup list of relevant records or cases.

Records and cases are displayed in a result list at the bottom left of the window. The result list contains the columns "Title", "Responsible", "Closed on", "ID", and "Keyword". Additionally, record cleanup lists include the columns "Case keywords" and "Case title". You can hide any of these columns, but not add additional ones. The contents of the columns correspond to those of the same name in the main window result list.

Next to the result list is a preview showing a predetermined range of metadata from the record or case selected in the result list. The metadata have determined by their relevance to cleanup tasks. Click **Participants** to view the participants involved on the record or case.

Between the cleanup searches and the cleanup list is a free-text search field. Use this to search for specific records or cases, responsible users or units, dates, or case numbers within the list.

Create cleanup search

It is possible to create two types of cleanup searches: record cleanup searches and case cleanup searches. Record cleanup searches are used to clean up and, if relevant, delete records without deleting their associated cases. Case cleanup searches are used to clean up and, if relevant, delete cases and their records. The two types are described in separate sections below.

Create record cleanup search

Click on **New record cleanup search** to create a new record cleanup search. The "New record cleanup search" dialogue opens, which is displayed below.

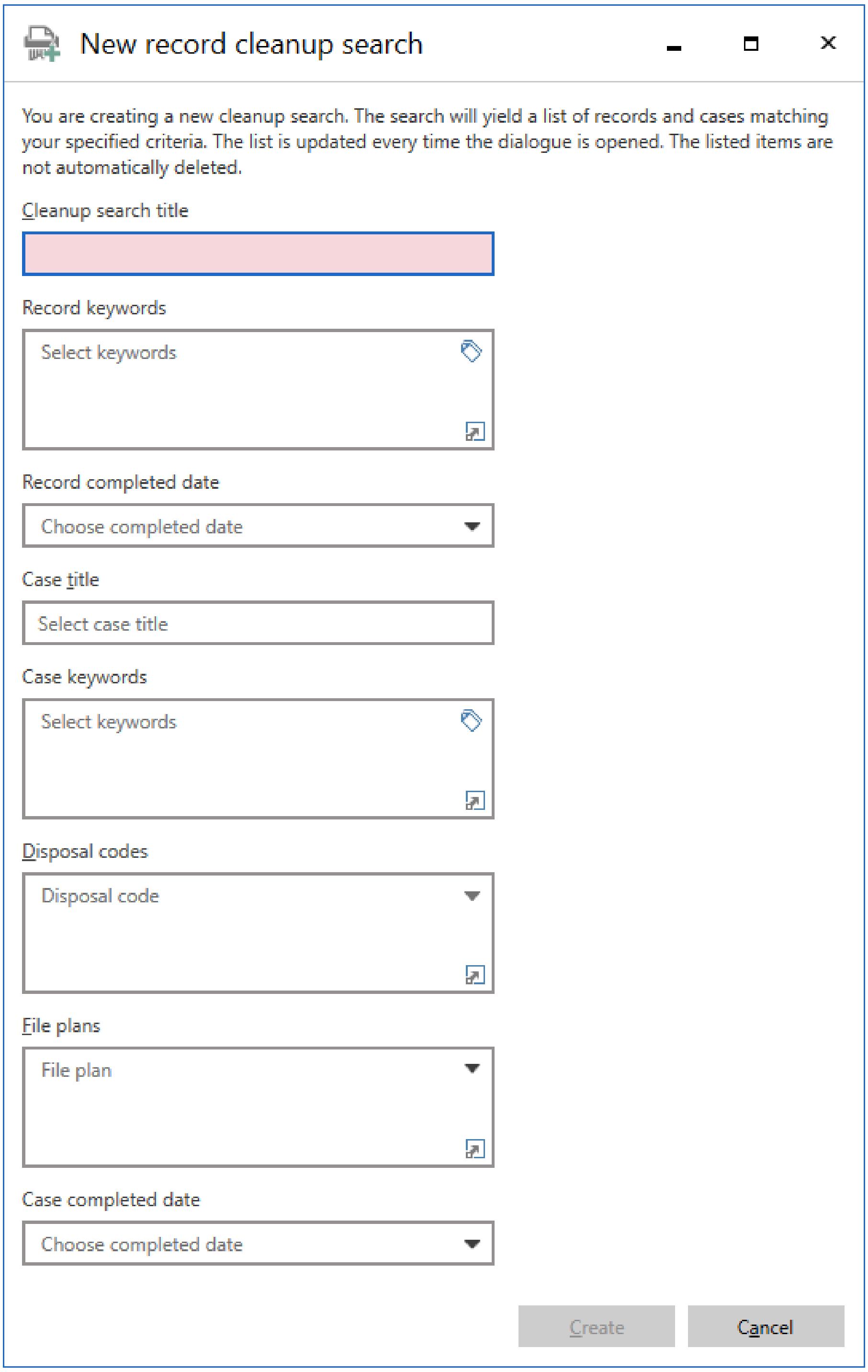


Figure 4. The "New record cleanup search" dialogue

Name the cleanup search. Then fill in a range of search fields to specify the types of records yielded by the cleanup search. There are no restrictions or requirements as to how many search fields to fill in, making it possible to only fill in those relevant to the particular cleanup task.

Record cleanup searches can be defined based on both records' and their associated case’s metadata as described in the table below.

Field	Description
Cleanup search title	Mandatory field. Give the search a name that describes its content, for example, "HR records older than 3 years".
Record keywords	Optional field. Add one or more keywords. The search will yield records that are marked with at least one of the selected keywords. **NOTE** It is not possible to use this field combined with "Case keywords". Fill in one, the other, or neither.
Record completed date	Optional field. In the drop-down menu, select how long ago the record was completed. Choose between completion 1/2, 1, 2, 3, 5, or 6 years ago. **NOTE** It is not possible to use this field combined with "Case completed date". Fill in one, the other, or neither.
Case title	Optional field. Write one or more words. The search will only yield records associated with cases where all the words are included in the case title. It is possible to use logical operators such as *, AND, OR, parentheses, and quotation marks. Read more about the use of logic operators in searches.
Case keywords	Optional field. Add one or more keywords. The search will yield records that are associated with cases that are marked with at least one of the selected keywords. **NOTE** It is not possible to use this field combined with "Record keywords". Fill in one, the other, or neither.
Disposal codes	Optional field. Add one or more disposal codes. The search will yield records associated with cases marked with one of the selected disposal codes.
File plans	Optional field. Add one or more file plans. The search will yield records associated with cases marked with one of the selected file plans.

Field	Description
	NOTE It is not possible to use this field combined with "Record completed date". Fill in one, the other, or neither.

NOTE Cleanup searches where at least one of the case fields is filled in will only yield records with a case association. Leave the case fields empty if you also want to find records not on cases.

Click on **Create** to create the cleanup search. When opened, the search will yield a cleanup list of all records currently matching the specified criteria.

Create cleanup search

Click **New case cleanup search** to create a new case cleanup search. The "New case cleanup search" dialogue opens, which is displayed below.

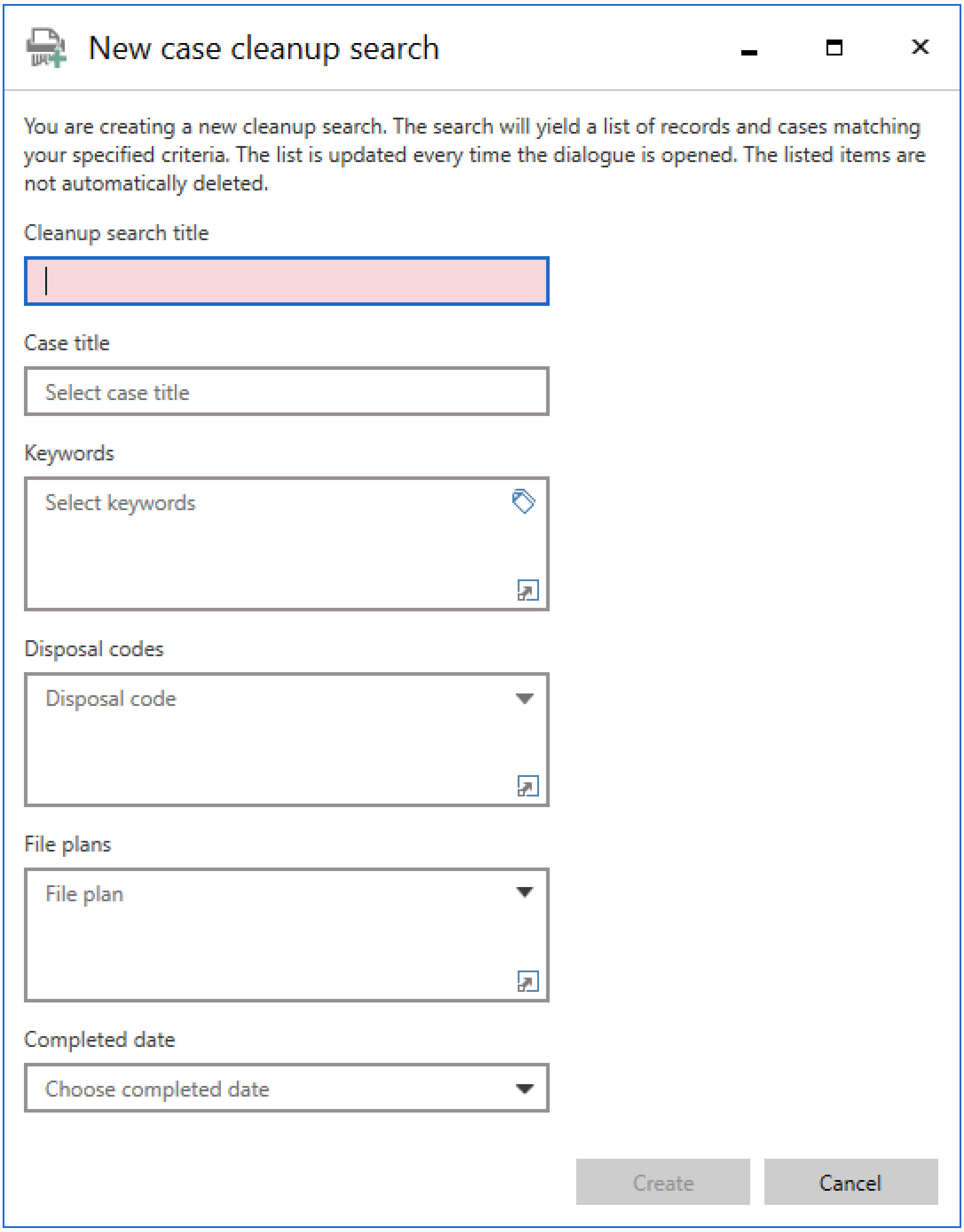


Figure 5. The "New case cleanup search" dialogue

Name the cleanup search. Then fill in the search fields to specify the types of cases yielded by the cleanup search. There are no restrictions or requirements as to how many search fields to fill in, making it possible to only fill in those relevant to the particular cleanup task.

The following table describes the fields in the dialogue and how to fill them.

Field	Description
Cleanup search title	Mandatory field. Give the search a name alluding to its contents, e.g. “Job applications (completed)”.
Case title	Optional field. Enter one or more words. The search will only yield cases with titles that contain all entered words. It is possible to use logic operators such as *, AND, OR, parentheses, and quotation marks. Read more about the use of logic operators in searches.
Keyword	Optional field. Add one or more keywords. The search will yield cases marked with at least one of the selected keywords.
Disposal codes	Optional field. Add one or more disposal codes. The search will yield cases marked with one of the selected disposal codes.
File plans	Optional field. Add one or more file plans. The search will yield cases marked with one of the selected file plans.
Completed date	Optional field. Select amount of time since the case was completed with the drop-down menu. Choose between completion 1/2, 1, 2, 3, 5, or 6 years ago.

Click **Create** to create the cleanup search. When opened, the search will yield a cleanup list of all cases currently matching the specified criteria.

Edit or delete cleanup search

Select a cleanup search and click **Edit criteria** to edit or delete it. The “Edit criteria” dialogue opens. Besides its title and icon, the dialogue is identical to the “New [record/case] cleanup search” dialogue (depending on the search’s type). Edit the search parameters by the same guidelines as applies to creation, then click **Save** to save the changes.

The cleanup search can also be deleted via this dialogue. Deleting the search has no effect on its current contents, i.e. any records or cases on its list will be preserved in F2’s database.

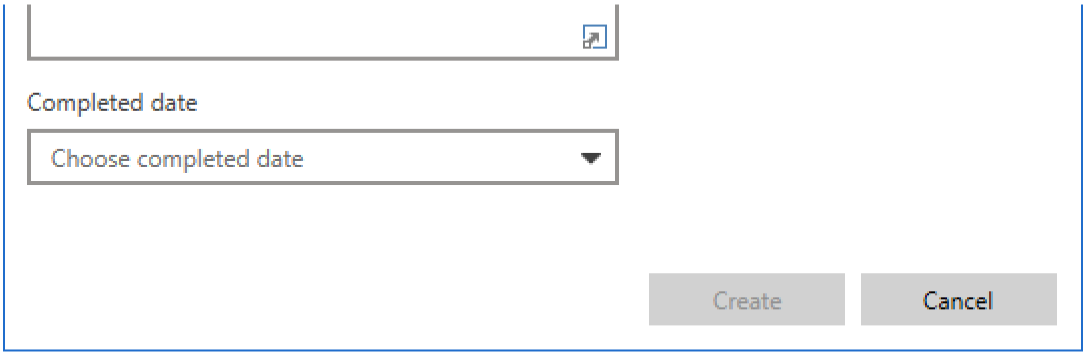


Figure 6. Save changes or delete search

Cleaning with cleanup lists

To perform a record or case cleanup, first review the cases and records currently listed by the cleanup searches of the “Data cleanup” window. This includes evaluating case metadata to look for potential errors and perhaps correcting these. Then the records or cases can be deleted using the cleanup list.

The following sections go over the cleanup process. Additionally, the built-in reporting options in F2 Data Cleanup are presented when relevant.

Review list contents

The cleanup task is based on a cleanup list generated by an existing cleanup search.

The cleanup task starts with an evaluation of the cleanup list contents to determine whether the records or cases are truly ready for deletion based on their metadata. Click the **arrow** next to a case in a cleanup list to expand it and show all its records. Double-click a record or case to open it.

It is also possible to generate a cleanup report with an overview of the cases and their records.

The preview shows the records’s or case’s responsible user or unit, making it easy to contact them and request changes to the metadata of any mislabelled records or cases identified in the list. This makes it easier to clean up the contents of the cleanup list and ensure that the wrong records and cases are not deleted by mistake.

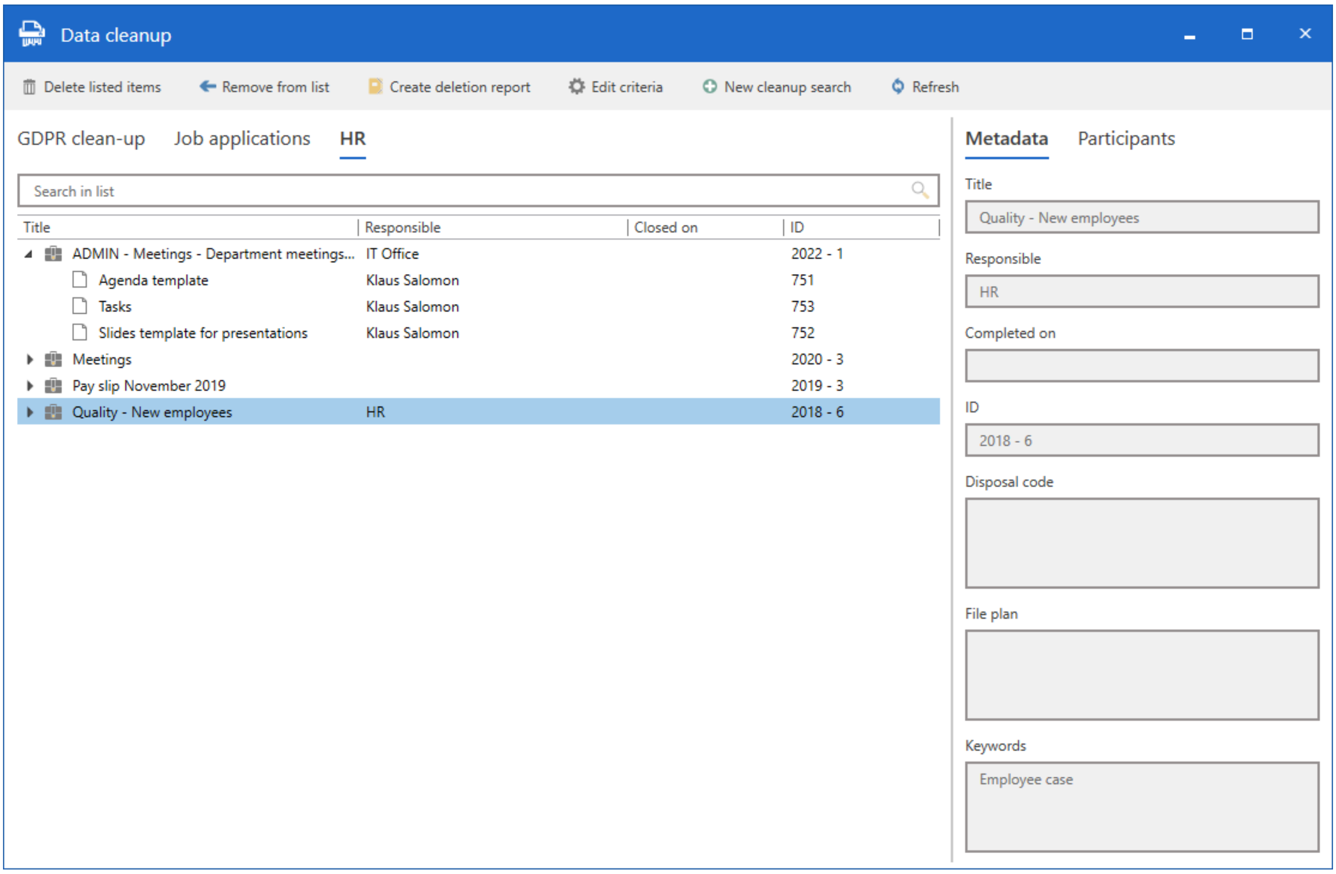


Figure 7. The “Data cleanup” dialogue

Cases and records can be manually removed from the list for later evaluation, though records cannot be independently removed from case cleanup lists. Select a record or case and click **Remove from list** in the ribbon. The process can be sped up by using the **up** and **down arrow** keys to navigate the result list and removing records and cases from the list with **Delete**. The cases are only temporarily removed. As long as the metadata of the record or the case (and its records) match the cleanup search parameters, it will be included when the cleanup list is next generated.

Generate cleanup report prior to deletion

During the cleaning process, it is possible to generate cleanup and deletion reports with an overview of the cleanup list contents. The reports help determine which records and cases to delete and make it possible to share the list of records and cases ready for deletion with users in F2 without granting them access to the data cleanup tools. In other words, report generation supports documentation and formal approval processes.

Click **Create deletion report** to generate a report. F2 automatically creates a new record titled “Deletion report for [number of] cases” or “Deletion report for [number of] records” and places the record in your inbox. For case cleanup lists, the record contains a PDF report for each case in the cleanup list, and the reports are all named “Deletion report for case [case title]”. For record cleanup lists, the record contains a single PDF report titled "Deletion report for [number of] records".

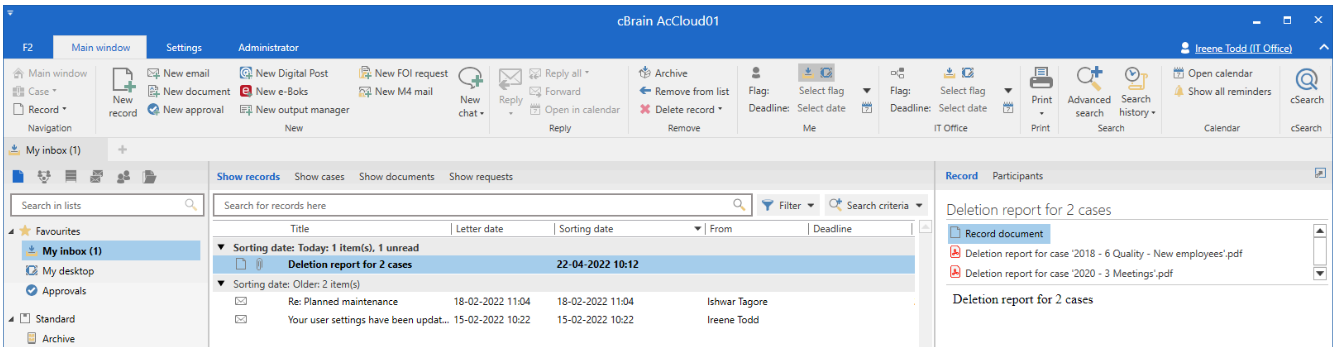
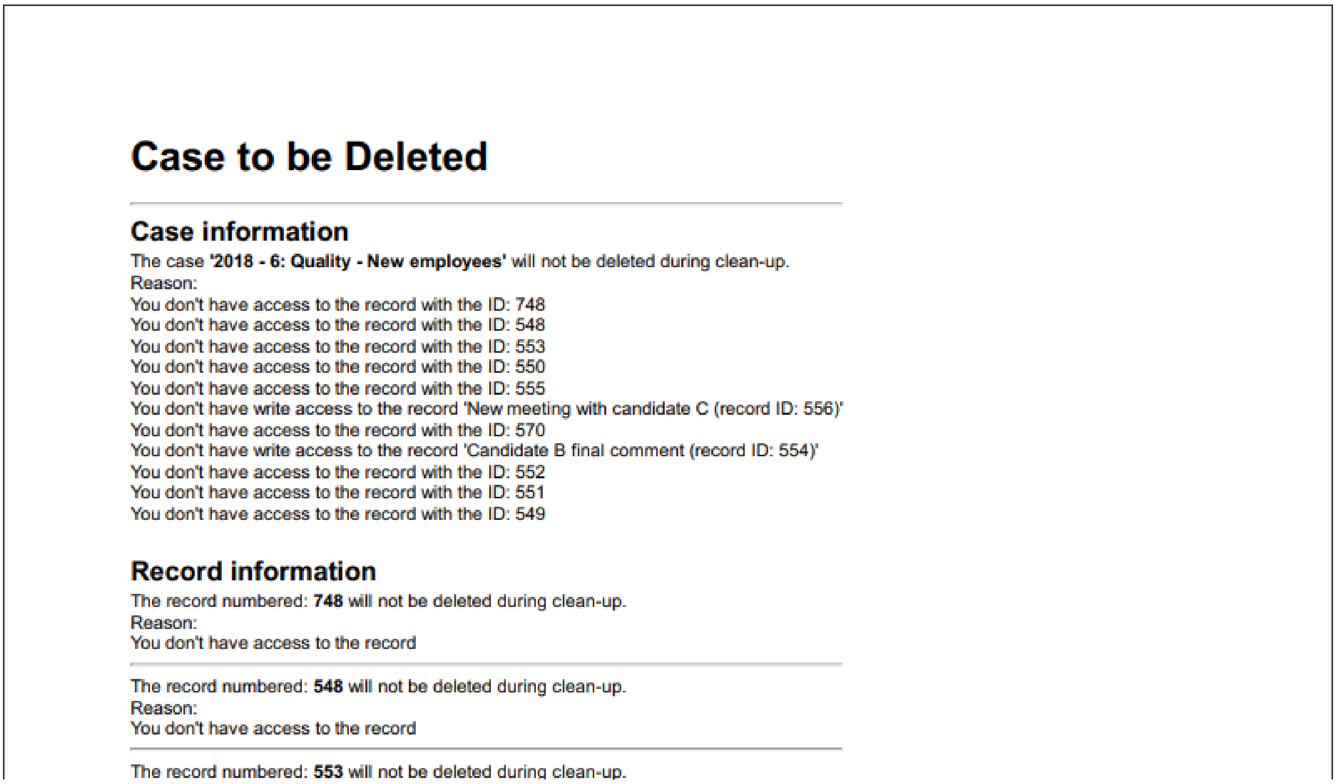


Figure 8. Record containing deletion reports for two cases

The reports are titled “Case to be Deleted” or "Records to be Deleted" and describe the following:

- Whether the case or record will be deleted during cleanup.
- Any reason why the case or record cannot be deleted, e.g. due to its access level or registration status.
- A selection of relevant record and case metadata.



Case to be Deleted

Case information

The case **'2018 - 6: Quality - New employees'** will not be deleted during clean-up.
Reason:
You don't have access to the record with the ID: 748
You don't have access to the record with the ID: 548
You don't have access to the record with the ID: 553
You don't have access to the record with the ID: 550
You don't have access to the record with the ID: 555
You don't have write access to the record 'New meeting with candidate C (record ID: 556)'
You don't have access to the record with the ID: 570
You don't have write access to the record 'Candidate B final comment (record ID: 554)'
You don't have access to the record with the ID: 552
You don't have access to the record with the ID: 551
You don't have access to the record with the ID: 549

Record information

The record numbered: **748** will not be deleted during clean-up.
Reason:
You don't have access to the record

The record numbered: **548** will not be deleted during clean-up.
Reason:
You don't have access to the record

The record numbered: **553** will not be deleted during clean-up.

Figure 9. Deletion report describing case that cannot be deleted

CONFIGURATION The report templates are configurable, and each organisation's layout may differ from the descriptions above. F2 is configured in cooperation with cBrain.

Delete list contents

Once the listed records and cases have been evaluated, and the list have been cleared of any records or cases listed by mistake e.g. due to errors in metadata, the items are ready for deletion. Click **Delete listed items** in the ribbon of the "Data cleanup" window. The dialogue shown below opens to confirm the deletion. In this dialogue it is also possible to generate a report detailing the deleted items.

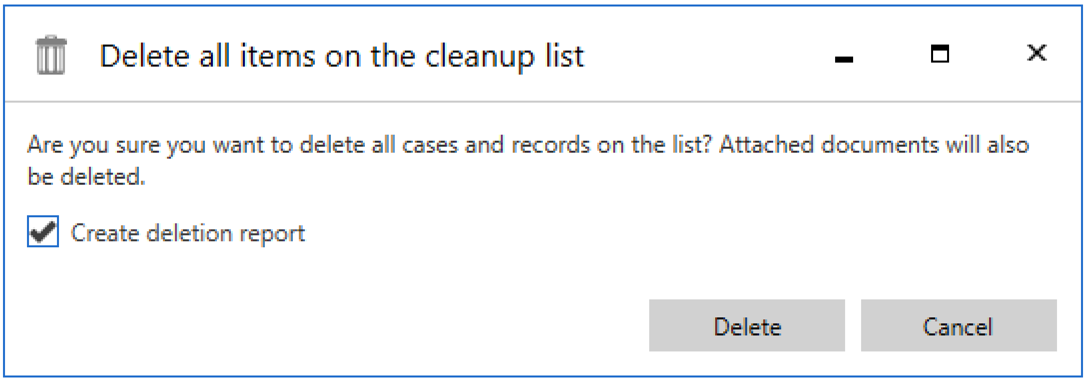


Figure 10. The dialogue "Delete all items on the cleanup list"

Tick the "Create deletion report" box to generate a deletion report as part of the deletion. These reports are created in much the same way as the reports created during cleanup.

Click **Delete** to initiate deletion. F2 will delete records and cases as a background process, making it possible to continue working meanwhile. Click **Cancel** to cancel deletion. No deletion report will be generated.

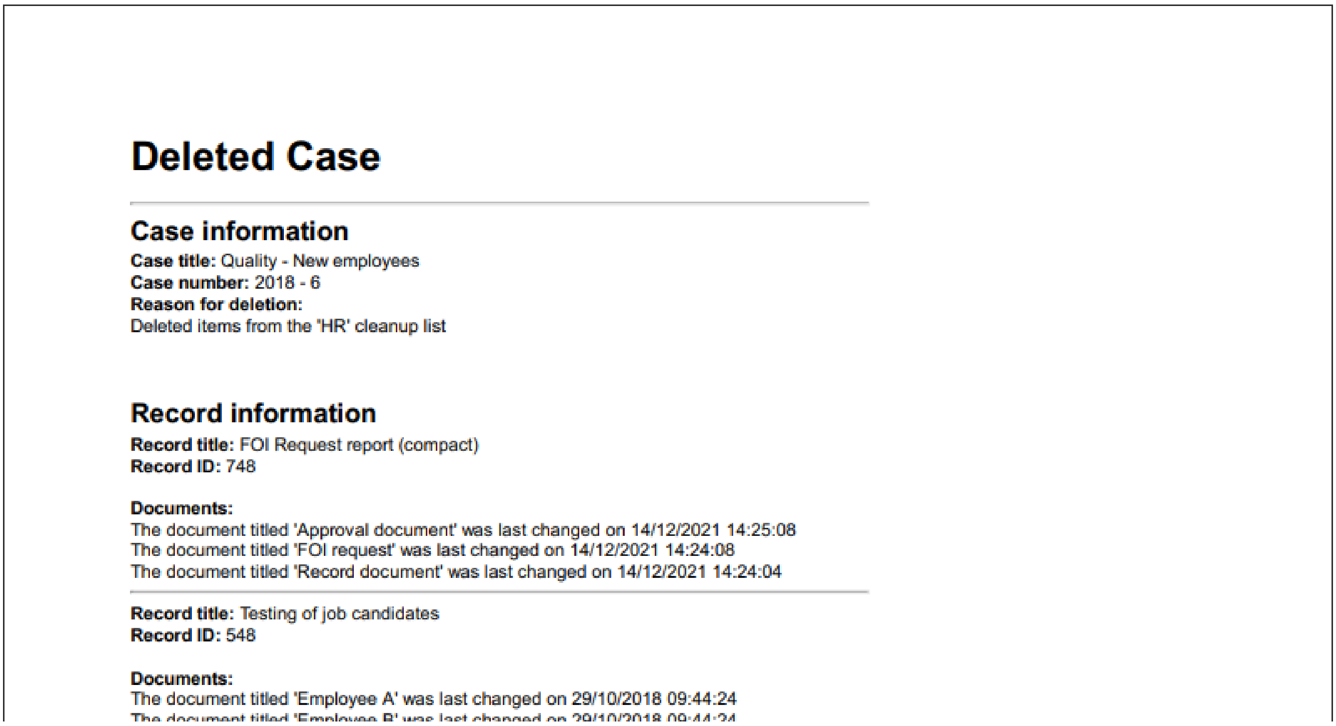
In certain situations records or cases may not be deleted. This applies to users cleaning up using the privilege “Limited access to data cleanup”. For instance, these users will be able to view records and cases to which they have read access in the cleanup list, but not delete them. They are also not able to delete registered records or cases with any registered records attached. The deletion report generated during deletion states whether a given record or case was actually deleted. Read more about the report in the section below.

Generate deletion report after deletion

Deletion reports can be created as part of the deletion process. They provide an overview of everything deleted and are useful in e.g. documentation or reporting. The reports are generated and attached to a new record, which F2 places in the user’s inbox similar to reports created prior to deletion.

The deletion reports are titled “Deleted Case” or "Deleted Record" and describe the following:

- Whether the record or case was successfully deleted.
- The cleanup list that the record or case was deleted as part of.
- A selection of relevant record and case metadata. Any attached documents are listed by title and date of their latest change.



Deleted Case

Case information

Case title: Quality - New employees
Case number: 2018 - 6
Reason for deletion:
Deleted items from the 'HR' cleanup list

Record information

Record title: FOI Request report (compact)
Record ID: 748

Documents:
The document titled 'Approval document' was last changed on 14/12/2021 14:25:08
The document titled 'FOI request' was last changed on 14/12/2021 14:24:08
The document titled 'Record document' was last changed on 14/12/2021 14:24:04

Record title: Testing of job candidates
Record ID: 548

Documents:
The document titled 'Employee A' was last changed on 29/10/2018 09:44:24
The document titled 'Employee B' was last changed on 29/10/2018 09:44:24

Figure 11. Deletion report for a successfully deleted case

F2 Data Cleanup configuration options

F2 Data Cleanup can be configured to fit the needs of the individual organisation. The following can be configured in cooperation with cBrain:

- Exclude private records from cleanup lists.
- Specify multiple security groups. All cases and records with the security group as part of their access restriction are excluded from cleanup lists.
- Change the layout and contents of the deletion reports.

NOTE The above list of configurations is not exhaustive. cBrain recommends that all configurations are made in cooperation with cBrain.