



**F2**

# Data Cleanup

Version 9

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## Reading guide

This manual is written for users of F2 Data Cleanup.

The manual contains a short introduction to F2 Data Cleanup and a general description of its functionality. The description adheres to best practice in digital bureaucracy.

The manual is based on an F2 solution with all available add-on modules installed. Users may notice some differences between their own F2 client and the one presented here depending on the add-on modules included in their organisation's F2 solution.

In this manual, the names of commands are **bolded**. Commands are clickable features such as buttons. The names of fields and lists are placed in "quotation marks".

References to other sections within the document and references to other documentation are *italicised*.

We hope you enjoy using F2.

# Introduction to F2 Data Cleanup

The F2 Data Cleanup add-on 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.

F2 Data Cleanup assists 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 are ready for deletion.

F2 Data Cleanup is a cleaning tool that supports the organisation’s regular case cleanup without dictating their deletion policy. The module is designed for large-scale, regular cleanup tasks based on lists which provide an up-to-date overview of cases ready for cleanup. The module’s design focuses on cleaning and, if necessary, deleting large numbers of cases simultaneously based on relevant predetermined parameters such as disposal codes and keywords. Any singular cases, e.g. a duplicate created by mistake, are better deleted via the case window as described in *F2 Desktop – Cases*.

Users who are given access to F2 Data Cleanup can view a range of metadata to evaluate whether a case 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.

The *Access to data cleanup* section offers additional details on data access, while potential security concerns are addressed in *Security concerns*. A description of how to access the module is followed by the *Manage cleanup searches* section, which contains a guide to working with cleanup searches and cleanup lists. Finally, the *Cleaning with cleanup lists* section 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 module 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 module

contains 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 also documented in F2's database. This documentation cannot be deleted, and said documentation can be extracted with the cPort module. Read more about data extraction in *F2 cPort – User manual*.

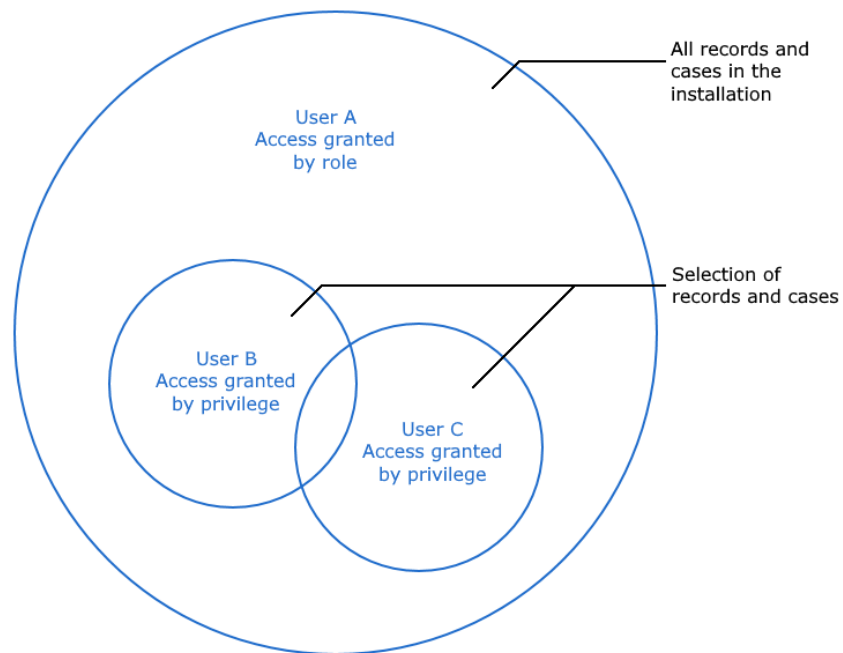
## Access to data cleanup

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 access to view all cases in the F2 installation that match a cleanup search and rights to delete these cases 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 cases where the user already has write access. This excludes cases with registered records or other regular protections against deletion. The user 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. Users with the "Access to data cleanup" role are able to view and delete cases from the entire F2 installation, while users with the "Limited access to data cleanup" privilege are only able to view and delete select cases within the installation. 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. Searches are created and managed and cases 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.

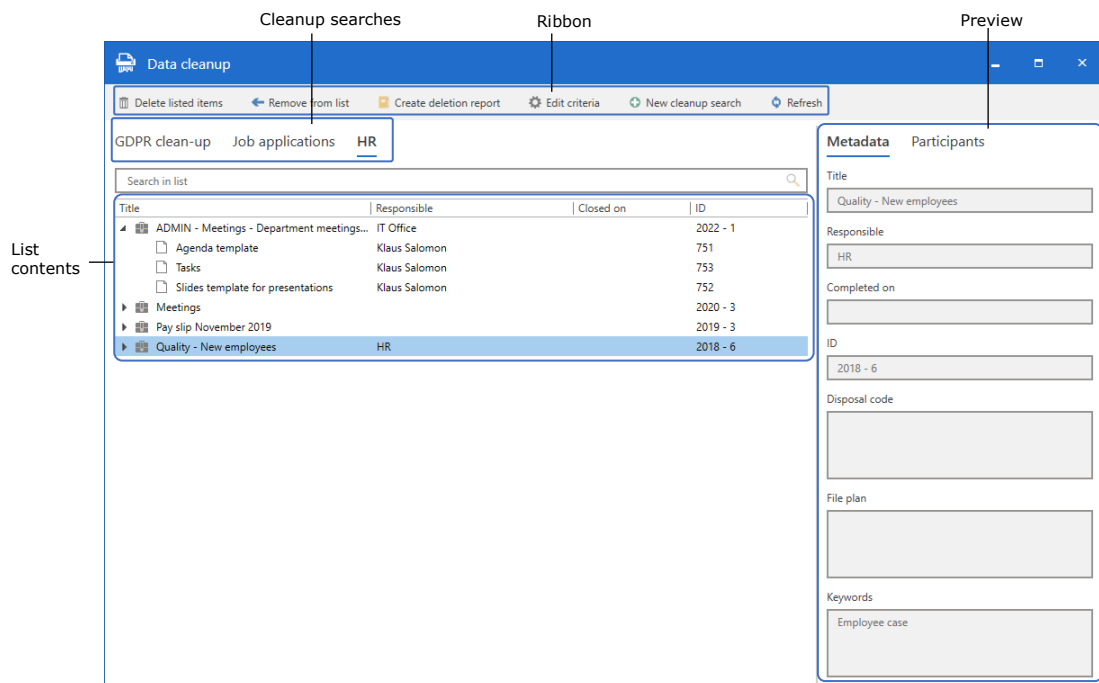
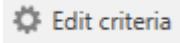
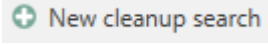
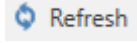


Figure 3: Layout of the “Data cleanup” window

At the top of the window is a ribbon with the following menu items:

Function	Description
Delete listed items	Delete all cases and records in the cleanup list. Read more in the <i>Delete list content</i> section.
Remove from list	Temporarily remove the selected case from the list. Read more in the <i>Review list content</i> section.
Create deletion report	Generate a PDF report detailing all cases and records 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.



Function	Description
	Read more about the deletion report for cleanup work in <i>The "Create deletion report" menu item.</i>
	Open the "Edit criteria" dialogue to edit the cleanup search criteria. It is also possible to delete the search in the dialogue. Read more in the <i>Edit or delete cleanup search</i> section.
	Create a new cleanup search. Read more in the <i>Create cleanup search</i> section.
	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 cases.

The cases and their records are displayed in a result list at the bottom left of the window. The result list contains the columns "Title", "Responsible", "Closed on", and "ID", and only those columns. The contents of the columns correspond to those of the same name in the main window result list, which are described in *F2 Desktop - Searches*.

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

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

## Create cleanup search

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

**Figure 4: 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.

<b>Field</b>	<b>Description</b>
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 *,

Field	Description
	AND, OR, parentheses, and quotation marks. Read more about the use of logic operators in searches in <i>F2 Desktop – Searches</i> .
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, 3, or 5 years ago.

Finally, 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

To edit a cleanup search, click **Edit criteria**, which opens the “Edit criteria” dialogue. Besides its title and icon, the dialogue is identical to the “New case cleanup search” dialogue described in *Create cleanup search*. 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 cases and records on its list will be preserved in F2’s database.

The image shows a dialog box with a search criteria input field at the top right containing a refresh icon. Below this is the label "Completed date" followed by a dropdown menu. At the bottom of the dialog are three buttons: "Save", "Delete search", and "Cancel".

**Figure 5: Save changes or delete search**

# Cleaning with cleanup lists

To perform a 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 cases can be deleted using the cleanup list.

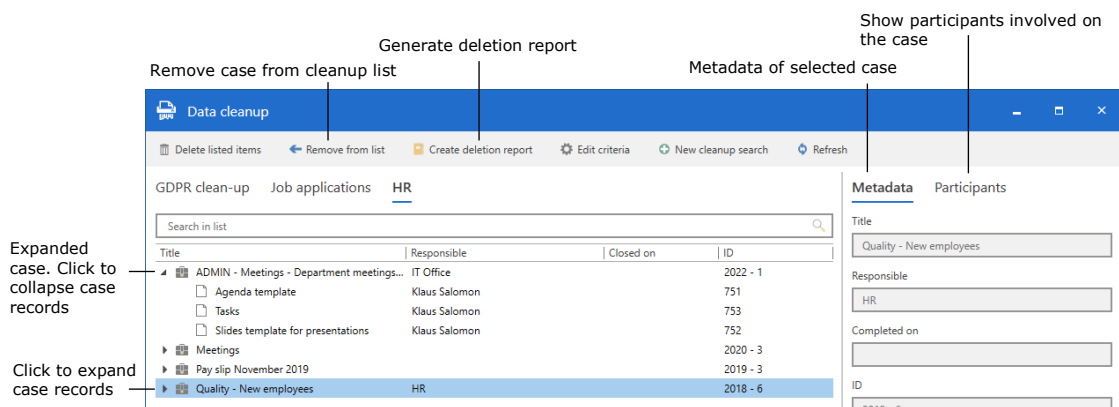
The following sections go over the cleanup process. Additionally, the built-in reporting options in F2 Data Cleanup are presented when relevant.

## Review list contents

The cleanup task is based on a cleanup list generated by an existing cleanup search. Creation of the latter is covered in the *Create cleanup search* section.

The cleanup task starts with an evaluation of the cleanup list contents to determine whether the 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, and double-click a case to open it. It is also possible to generate a cleanup report with an overview of the cases and their records. The report is generated by clicking **Create deletion report** in the ribbon, which is described in the section *The “Create deletion report” menu item*.

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



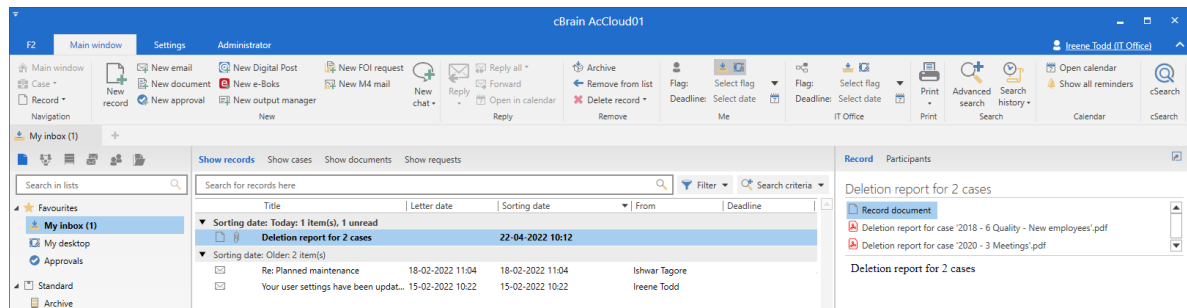
**Figure 6: The “Data cleanup” dialogue**

Cases can be manually removed from the list for later evaluation. Select a 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 cases from the list with **Delete**. The cases are only temporarily removed. As long as the metadata of the case and its records match the cleanup search parameters, the case will be included when the cleanup list is generated.

## The “Create deletion report” menu item

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

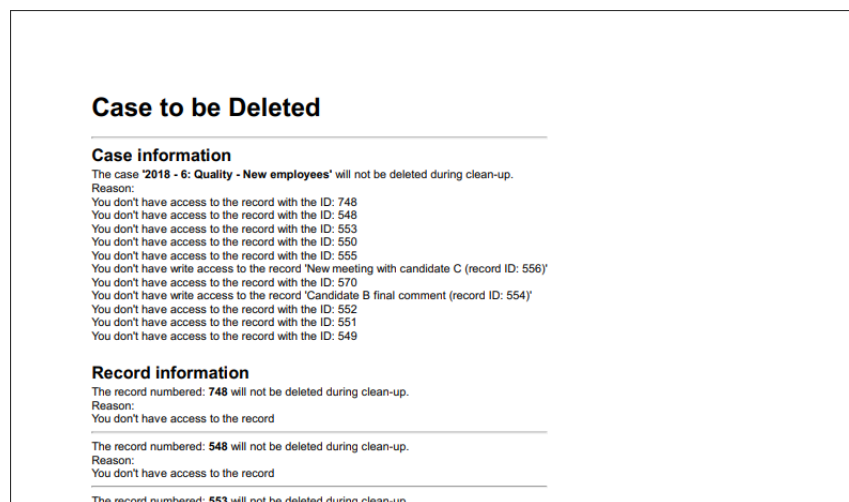
Click **Create deletion report** to generate a report. F2 automatically creates a new record titled “Deletion report for [number of] cases” and places the record in the user’s inbox. The record contains a PDF report for each case in the cleanup list, and the files are all named “Deletion report for case [case title]”.



**Figure 7: Record containing deletion reports for two cases**

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

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

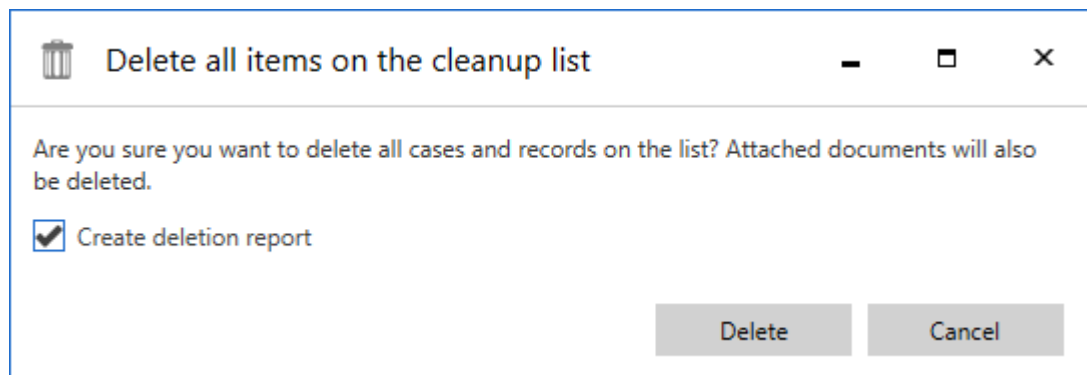


**Figure 8: Deletion report describing case that cannot be deleted**

**Note:** 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 cases have been evaluated, and the list have been cleared of any cases listed by mistake e.g. due to errors in case 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 9: 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, which are described in *The "Create deletion report" menu item* section.

Click **Delete** to initiate deletion. F2 will delete cases and records 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 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, but not delete, cases to which they have read access in the cleanup list, nor will they be able to delete cases with any registered records attached. The deletion report generated during deletion states whether a given case was actually deleted. Read more about the report in the section below.

## The "Create deletion report" field in the "Delete everything" dialogue

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 creation process is further described in *The "Create deletion report" menu item*.

The deletion reports are titled "Deleted Case" and describe the following:

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

## Deleted Case

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### 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

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**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 10: Deletion report for a successfully deleted case**

# Configuration options for F2 Data Cleanup

The configuration of F2 Manager is performed on an installation level to fit the organisation and its working procedures. 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.



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