

Records Retention Schedule Tabular Report



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Introduction

The new “Records Retention Schedule - Tabular” report has been created as a replacement of the the “Records Retention Schedule - Advanced” to provide a refreshed report layout and resolve performance issues.

The “Records Retention Schedule - Advanced” will remain in place for a period of time to allow a smooth transition.

Summary of Changes

Summary of changes:

- Report configuration settings are remembered per user
- Report output options are tabular (aka flat output) ONLY
- Report header has been split into 3 columns for logo, title, and report date/requestor.
- Report configuration options have been moved to a new tab
- Report uses IRM Branding - customer branding is available in the next update
- Improve sorting/filtering by stacking common mapping fields and using dedicated fields for individual mapping fields.
- Performance issues are resolved and report runs in < 1 min in most cases and < 5 mins for larger reports.

Report Header



Records Retention Schedule

Date: 2021-07-02_18-25-12

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Leftmost section contains logo, blank, or text for custom reports.

Middle Section contains report title or other text for custom reports

Right section contains date and requested by or other text for custom reports

NOTE: Text color defaults to IRM branding colors, but can be set to no branding or customer provided colors in the next update.



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Column Headers

Name	Description	Type
Audit and Compliance	Audit and Compliance API	Rule
Policies, Programmes, and Procedures	Records describing the Bank's approach to interpreting and satisfying legal, regulatory, operational, or contractual requirements and records relating to programmes designed to document good business practices. Includes standard operating procedures and all Bank and programme policies. Does not include records that demonstrate compliance with these policies, programmes, and procedures.	Rule

- Column Header colors are branded
- Auto-filter has been enabled
- All sections align with report columns eliminating placeholder rows/column that were present in “Advanced” report

Options Tab

Object	Filters	Fields
Report Settings	Source: Working Copy	
Record Class	Include Record Classes Without Mappings Include Disabled Include Legacy	Type, Name, Description
Rule	Include Disabled	Type, Name, Trigger, Min Period, Max Period, Justification Text
Citation	Include Disabled Display Only Principle Authority Citations	Type, Title, Section / Sub Section, Heading, Name, Source Object, Trigger, Min Period, Max Period, Justification Text

- Options Tab defaults to being present and can be disabled for custom reports
- Options are organized by Object, Filters, and Fields selected
- Content has been streamlined to show only selected report options

Report Layout

Report Layout is designed to promote easy sorting and filtering by aligning common fields and placing each unique field into a dedicated column.

Record Class Fields	Common Mapped Object Fields	Unique Rule Fields	Unique Citation Fields	Unique Data Owner Fields	Unique Data Source Fields	Unique Document Type Fields	Unique Privacy Obligation Fields
Record Class Fields	Blanks						
Record Class Fields	Common Mapped Rule Fields	Mapped Rules	Blanks				
Record Class Fields	Common Mapped Citation Fields	Blanks	Mapped Citations	Blanks			
Record Class Fields	Common Mapped Data Owner Fields	Blanks		Mapped Data Owner	Blanks		
Record Class Fields	Common Mapped Data Source Fields	Blanks			Mapped Data Source	Blanks	
Record Class Fields	Common Mapped Document Type Fields	Blanks				Mapped Document Type	Blanks
Record Class Fields	Common Mapped Privacy Obligation Fields	Blanks					Mapped Privacy Obligation

Sorting

Record Class	Sorted according to manual drag & drop mirroring Policy View
Retention Rule	Global/Baseline rules sorted by min period descending followed by jurisdiction exception rules sorted by min period descending
Citation	Sorted by Min Period Descending
Data Owner, Data Source, Document Type, Privacy Obligation	Sorted by name

Filtering

Record Class	Specific Record Class, Include with/without mappings, Include Disabled, Include Legacy, Taxonomy Levels
Retention Rule	Include Disabled, Filter by jurisdiction, Prevailing Rule logic
Citation	Include Disabled, Filter by jurisdiction, Principal Authority
Data Owner, Data Source, Document Type, Privacy Obligation	Include Disabled, Filter by jurisdiction

Report file name

The report file name may be specified to override the default name rrsTabular. This will be included in the report download file and also within the bell notification area. In all cases a timestamp will be appended to the report to indicate request date and time.

Performance

- Most report configurations run < 1 min
- Large report configuration run < 5 min

Coming soon...

- Data Compliance Obligations will be added
- Translations will toggle entire report into selected language
- Branding options will support no branding and specific customer branding for logo and color
- Resolve defects on “Download Failed” when generated report is empty.
- *Additional enhancement requests based on feedback received*