



Most of our customers don't have Lifecycle Manager. If you do have it and you're a site or content administrator then you've probably seen Lifecycle Manager Policies on your DocuShare homepage.. Clicking on that link opens up a page so that you can create your own policies or change existing ones.

Lifecycle Manager Policies

CREATE LIFECYCLE MANAGER POLICY

Title	Collection	Search Object	Date Property	Action	Owner	Status	Next Run Time	Last Run Time	Actions
Testimonium sweep for old files	Testimonium	Document	Modified Date	Both	Doug Crews	Enabled	03/09/2018 04:00 AM	02/09/2018 04:00 AM	EDIT RUN NOW PREVIEW

Lifecycle Manager is kind of a lightweight records manager. It allows you to determine which documents should be handled in a particular way at a particular time or when something about it changes. Frequently, this just pertains to the age of a type of document. If, for example, you have invoices archived that you no longer need after seven years then you can tell Lifecycle Manager to bring this to your attention via a report email to you or you can use it in conjunction with Content Rules to perform an action. Typically, that action is to delete the content, but it could also be used to move documents to another location for third-party archival or many other functions.

Create A New Content Rule

Event Triggers

Describe the event that will trigger the action by selecting one event from the list below. If you select Routing, you must also select a status from the list that displays.

When the event is: Lifecycle management

Application event type: Lifecycle Policy

When the object type is: Invoice

Select a document type:

- * (Any document type)
- Adobe FrameMaker Document(.fm, .book) - application/vnd.framemaker
- Adobe Illustrator File(.ai) - application/vnd.illustrator
- Adobe InDesign File(.indd) - application/vnd.indesign
- Adobe Photoshop Document(.psd) - application/vnd.photoshop
- Adobe Portable Document Format(.pdf) - application/pdf

Event applies to: This container and immediate contents

CANCEL **< PREVIOUS** **NEXT >**

If your objective is to archive documents for a longer term then you may want to look at the DocuShare Archive Server. This works very well, but there's a caveat in that the Lifecycle Manager doesn't work with the [DocuShare Archive Server](#). If you want to look into this and still have a means of easily deleting content from a DocuShare Archive Server, call us about our [DocuShare Archive Assistant](#).

Here is a link to a [PDF of what the Edit page](#) looks like to create or change a policy. This will help you to follow the narrative.

Using DocuShare's Lifecycle Manager

Criteria First



You can name your policy and define when and where it applies such as to a particular collection and all of its subcollections. You specify what types of objects you want to affect, such as documents and objects cloned from the document object, and then you can indicate whether it's a generic document or a custom object as you see depicted here. You specify what kind of notification you want and when it should occur.

Search Scope: (Required)	Documents
Object Type to Search: (Required)	<ul style="list-style-type: none"> --Select-- Document Deed Credit Application Job Ticket Mortgage Legal Bill of Lading Student Record Expert Witness Income Statement Purchase Order Invoice Purchase Request Certificate
Policy Action:	
Event Occurs:	
Date:	

The additional criteria allows you to trigger the policy to act when that object's specific properties change to something such as Issue contains "resolved". These triggers can work in conjunction with the date so you can delete all resolved issues after 5 years, for example.

What follows next in your PDF example is similar to what you might see in the Windows Task Scheduler where you indicate when it should run. Then you determine who should be notified with the report. (I always like to see a Comments text box when you're setting something up so that others can see why you said it up.) You can enable it to run at any time or within a certain timeframe. You can also disable it so it doesn't run without having to delete the policy. You'll find this to be well thought out by Xerox.

Policy Title: (Required)	--Select--
Collection Handle: (Required) <small>(Enter "all" for entire site.)</small>	Issue
Search Scope: (Required)	Keywords
Object Type to Search: (Required)	Degrees and Certificates
Policy Action:	Claim Number
Event Occurs:	Model
Date:	BarCode
Notify:	Revision Number
Date: (Required)	Author
Additional Criteria:	Hold Info
	Check
	Email Test
	Opportunity ID
	asgn
	JobID
	Patient ID
	Description
	Title
	Shop Order #
	Vendor ID
	--Select--

Next we'll look at a sample report that I run on the demo server that is emailed to my attention.





From: support@criteriafirst.com Sent: Sat 12/9/2017 4:00 AM
To: doug.crews@criteriafirst.com
Cc:
Subject: Testimony Alerts for 12/09/2017

Total number of Document objects in the following list : 4

Following are the Document objects that are already expired


Policy Title: Testimony sweep for old files

Description: Review before deleting old content as it may be useful or show extensive versioning for customers to view.

Title		Modified Date	Owner	Description	Create Date
BCBS enrollment form for handprint response <i>Appears In »» Enrollment Forms</i>	↑↑↑ 	03/16/2015	Doug Crews	BCBS	02/09/2006
Compass_logo.gif <i>Appears In »» Reports</i>	↑↑↑ 	04/29/2011	Doug Crews		12/03/2010
Fortis group insurance enrollment card <i>Appears In »» Enrollment Forms</i>	↑↑↑ 	03/16/2015	Doug Crews		02/09/2006
Vehicle information form for AIG auto insurance application <i>Appears In »» Enrollment Forms</i>	↑↑↑ 	03/16/2015	Doug Crews		02/09/2006

From the email message you can open the document or it's containing collection to review the content. You can see who the owner is, when it was created and last modified, and a description if any. Clicking on the properties icon yields more information about the content. If you decide it's okay to delete the object, click on the trashcan and you'll see a browser page open to confirm whether you'd really care to delete it.

Confirm Delete

Type	Title
<input checked="" type="checkbox"/> 	Compass_logo.gif <i>Appears In: Reports</i>

DELETE

This clicking-the-can operation can get tedious pretty quickly if you're the designated record or content manager. Once again, using Lifecycle Manager with Content Rules can automate a lot of useful processes. If you'd like an overview and discussion of how to use Lifecycle Manager or Content Rules for your DocuShare information governance objectives, just call or write to us at info@criteriafirst.com and we'll be glad to help you.