

Timeline

Released to Training & Production:	Wednesday, April 10 th , 4 pm - 7 pm PDT <i>All sites will be online for this release.</i>
Live Demo:	Monday, April 8 th , 11 am PDT Register at: http://bit.ly/2U3dsrR
Recorded Demo available in NEOGOV Community:	Monday, April 8 th , 6 pm PDT

Summary

- A. Insight - Data Retention: Global settings
- B. Insight -Data Retention: Security Settings
- C. Insight - Data Retention: Requisition Retention Settings
- D. Insight - Data Retention: Recruitment Plan Retention Settings
- E. Insight - Data Retention: Dashboard Alerts
- F. Insight -Data Retention: Upcoming Purge Report
- G. Insight - Data Retention: Email Alerts
- H. Insight/OHC - Candidate Notices sent from GovernmentJobs.com and Replies To Verbiage
Removed

Enhancement Details

A. **Insight - Data Retention: Global Settings (IS-28953)**

Data Retention has been introduced to help users purge old data and better organize the system. Users will have the ability to modify data retention settings from Menu-> Admin-> Configuration Settings-> Data Retention Controls.

Users can select the retention period which ranges from 3 years to 10 years and is set to 3 years by default. Users can select the frequency of purge from the following options:

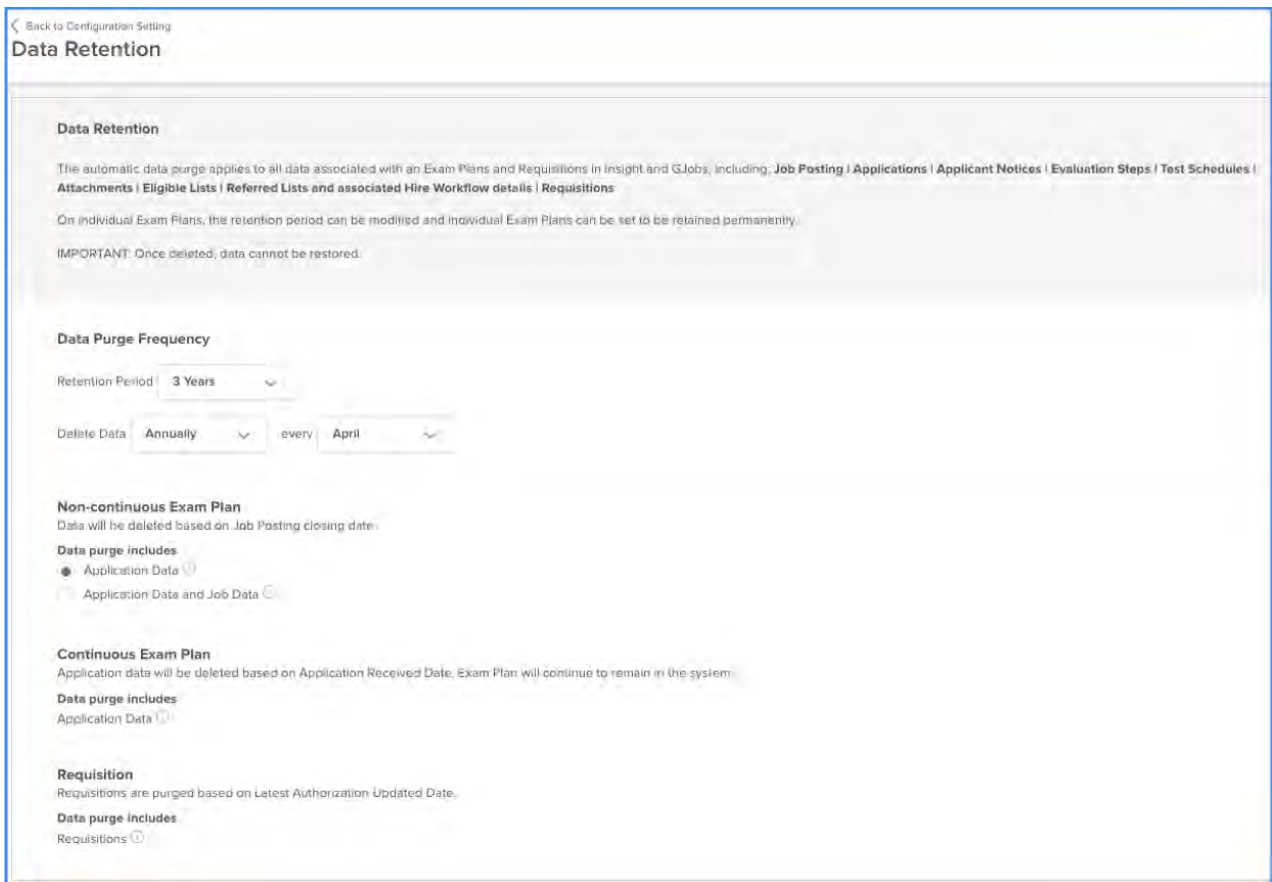
- Monthly
- Quarterly
- Semi-Annually
- Annually (Default)
 - For annual frequency, users can also select the month of purge which is presently defaulted to January

Users will also have the ability to select how they want to purge data for continuous and non-continuous exam plans and the list of purged items for each selection is as follows:

- Application Data: Applications, Applicant notices, All applicant information from evaluation steps, eligible list, referred list
- Application and Job Data: Exam Plan, Applications, Applicant Notice, Evaluation steps, Eligible Lists, Referred Lists and Associated Workflow Details, Job Posting and Scoring Plan

Non-continuous exam plans' data will be deleted based on the job posting closing date. Continuous exam plans' data will be deleted based on the application received date and the exam plan will continue to remain in the system

Users will also see the information on what is included for purging requisitions. Requisitions are purged based on "Latest Authorization Updated Date"



Navigation: Menu-> Admin-> Configuration Settings-> Data Retention Controls

B. Insight - Data Retention: Security Settings (IS-33282)

Admins can modify which users have the ability to modify individual retention settings for exam plans and requisitions from the security roles configuration for Insight.

If “Exam Plan” is checked, the user can modify individual retention settings for the specific Exam Plan. If “Requisition” is checked, the user can modify individual retention settings for the specific requisition.

Fields marked with an asterisk (*) are required

* Security Role: HR User (DHS C/R)
HRMS Code: [text box]
* Scope: All exam plans/lists in user's department(s) Assigned exam plans/lists only

Administration
Impersonate: OHC Users
Login Time Rules: Add Delete Edit
Security Roles: Add Delete Edit

Analytics
Analytics: On

Data Retention Controls
Modify Retention: Exam Plan: Requisition:

*Navigation: Menu-> Admin-> Configuration Settings-> Security Roles-Insight Configuration-> Edit->
Data Retention Controls*

C. Insight - Data Retention: Requisition Retention Settings (IS-32986, IS-35255)

Users will have the ability to modify retention settings for individual requisitions from Requisition Authorization Page. The global data retention period is applied by default to all requisitions. Users will have the ability to retain the requisition for a greater period than the global retention period. Users can also choose to retain individual requisitions permanently. The following rules are applied for purging:

- All Requisitions irrespective of the status - "Draft", "In Progress", "On Hold", "Approved", "Open", "Filled" or "Cancelled", the requisition data retention is based on the "Latest Authorization Updated Date" on that Requisition. If the "Latest Authorization Updated Date" is older than the Requisition Data Retention period, then the Requisition will be purged. In case there is no authorization update date on any requisition, then the requisition create date will be used for retention period calculation.
- For all requisitions, if the non-continuous exam plan associated with it is purged based on the individual exam plan retention period settings, the requisition will also be purged if its retention period matches that of the exam plan's.
- For all requisitions, if all of the applications under a continuous exam plan associated with it is purged based on the individual exam plan retention period settings and the requisition retention period is the same as the exam plan retention period, then the requisition will be purged as well.
- For all requisitions, if any applications (Referred Candidates) under the requisition are being retained for a longer period than the individual requisition retention period, then the requisition

that has these applications (Referred Candidates) associated with it will not be purged. Whenever exam plans and requisitions are linked and there are applications associated with the requisition, then the greater retention period applies for purging the requisition.

If applications are being retained for a longer period than the individual requisition retention, the requisition that has these applications associated with it will not be purged. Users with “Requisition” checked under data retention settings will only be able to modify this setting.

Transportation Engineer 9-P11

This requisition has been assigned to the following Exam Plan:

Exam #	Title	Action
5901-09-51800KB	Transportation Engineer 9-P11	Disassociate

Fields marked with an asterisk (*) are required

* Status:

* Assigned To:

Existing Exam Plan:

Comments:

Retention Period: Retain permanently
 Delete after

Global Setting for data retention is 3 years.

Navigation: Insight > My Dashboard > Requisitions > Authorize Requisition

D. **Insight - Data Retention: Recruitment Plan Retention Settings (IS-28976)**

Users will have the ability to modify exam plan retention settings for individual exam plans from Exam Plan Details> Edit Exam Plan page.

Agency preference setting on the global data retention settings is applied as the default period. Users can retain individual exam plans for a longer period than the global retention settings. Users can also choose

to retain individual exam plans permanently.

The retention period tooltip provides a detailed list of items that will be purged based on the global retention settings.

Users with “Exam Plan” checked under data retention settings will only be able to modify this setting.

Fields marked with an asterisk (*) are required

* DEPT: Health and Human Services - Counties

Div: == Select ==

* Job Code: SOCSSPLE - Services Specialist 9-P11

* Job Title: **Immediate Vacancies!** Services Specialist 9/1C

Exam Number: SS - Ingham

Vacancies
Please enter non decimal number:

* Exam Type: Open

* Job Type: Permanent Full Time

Auto-Refer to Hiring Manager: Yes No

Job Line: Yes No

Print Bulletins: Yes No

Number of Bulletins: Fold-out: Yes No

Retention Period: 1 Retain permanently Delete after 3 years

Global Setting for data retention is 3 years.

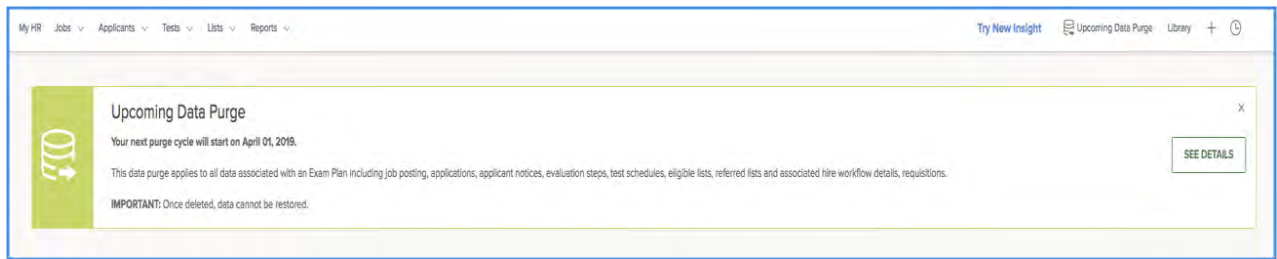
Comments:

Save

Navigation: Insight > My Dashboard > Exam Plans > Exam Plan Details > Edit Exam Plan

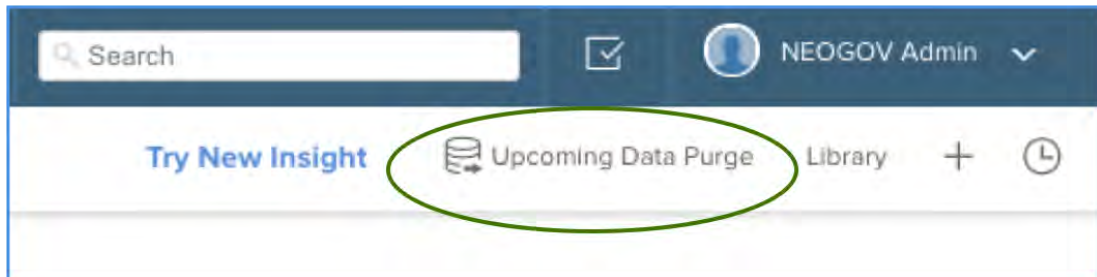
E. Insight - Data Retention: Dashboard Alerts (IS-34502)

Users will be alerted on upcoming data purge with an alert on the dashboard. Users can see the next purge cycle start date. Users can also click on “See Details” to view more details. This will take the user to the upcoming purge report details page.



Navigation: Insight Dashboard

Users can close the above message and always access upcoming purge details from the icon as given below to the left of Library on the main menu.



Navigation: Insight Dashboard

F. **Insight - Data Retention: Upcoming Purge Report (IS-34526, IS-35383)**

Users will have the ability to view a report on the upcoming data purge by clicking the “View Details” button on the dashboard alert or by going to Reports->Standard Reports-> Data Purge Report in the System Admin category.

Users will see information on the start cycle and a list of items will be provided by

- **Continuous Exam Plans:** This list includes items that will be deleted for exam plans with continuous job postings. Users will be able to drill down into the applications for non-continuous exam plans as only application information is purged and exam plans are retained for this job posting type.
- **Non-continuous Exam Plans:** This list includes items for exam plans with non-continuous job postings. The purge schedule is based on the job posting closing date.
- **Requisitions:** This list includes the list of items that will be deleted based on the Requisition Latest Authorization Date.

Users will have the ability to review the list of items and make any edits as required before the purge cycle

starts. It is important to note that once deleted, data cannot be restored. When the purge is ongoing, users will see a message "Data purge for this cycle is currently in process. No edits can be made at this time".

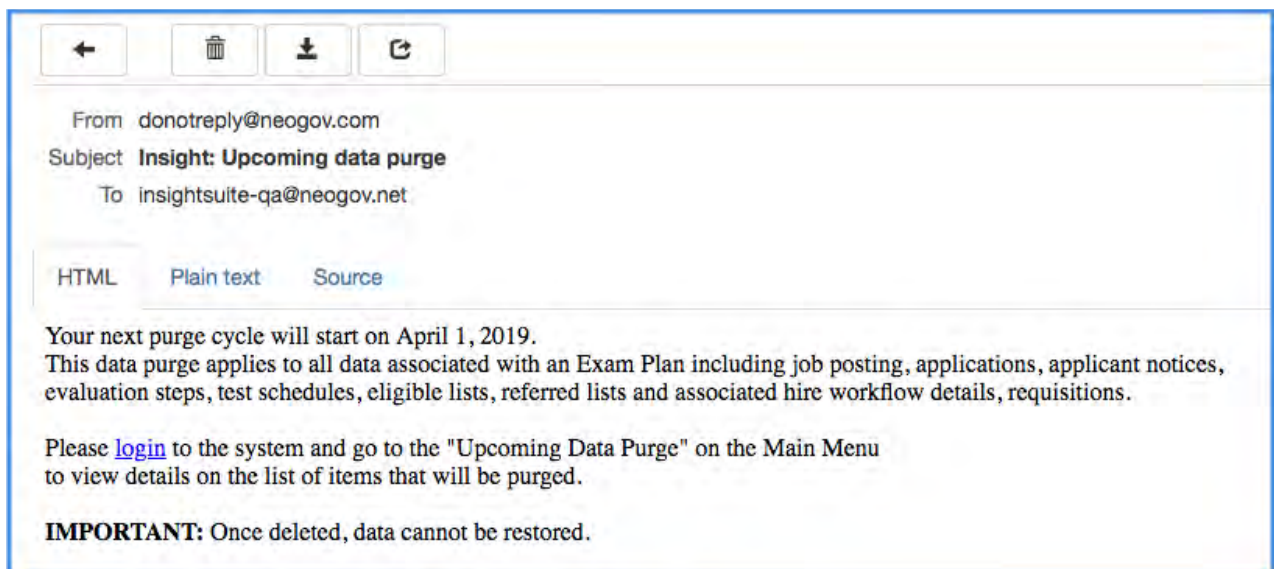
Users will have the ability to sort and search all columns. Users can also export/print the report for record keeping purposes.

G. Insight - Data Retention: Email alerts

a. Upcoming Data Purge Alert (IS-34518)

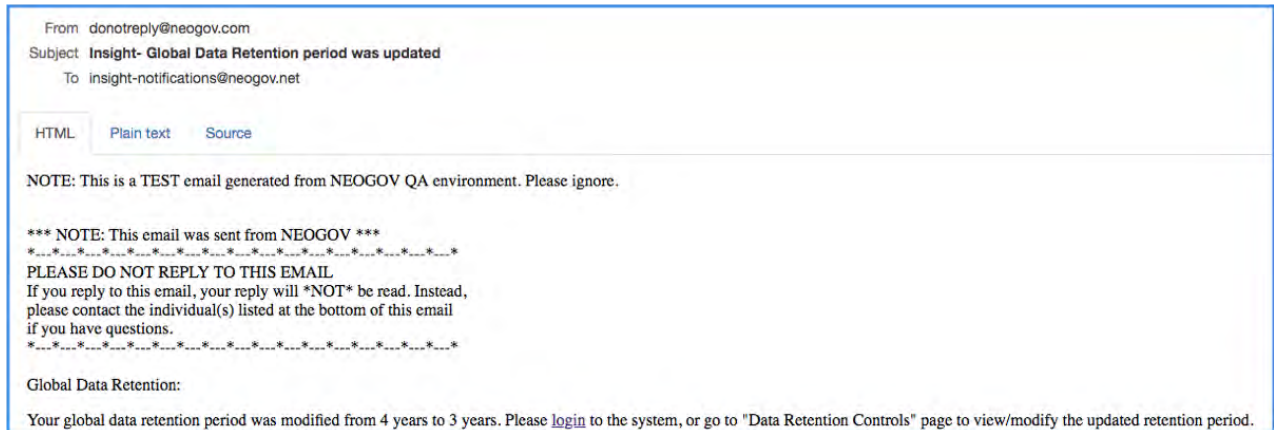
Users will have the ability to receive an alert via email on the next purge cycle with details on the start date. The alert notices will be sent as per the following frequency settings:

- Monthly: Users will be alerted 10 days before the purge start date
- Quarterly: Users will be alerted via email 30 days and 10 days before the purge start date
- Semi-Annually: Users will be alerted via email 60 days, 30 days and 10 days before the purge start date
- Annually: Users will be alerted via email 90 days, 60 days and 30 days before the purge start date



b. Global Data Retention Period Settings Alert (IS-28968)

All Insight Admins will be notified whenever the global data retention period is modified. The email will contain details on the previous setting and updated setting. Users can login to the system and take action if required.



c. Global Data Retention: Other Modifications Alert (IS-28968)

All Insight Admins will be notified whenever the global data retention settings are modified besides the retention period. This will be a generic email notifying users that changes have been made. Users are required to login to the system to view changes.

H. Insight/OHC - Candidate notices sent from GovernmentJobs.com and replies to verbiage removed (IS-33428)

To resolve email delivery issues, all emails sent to jobseekers will now be sent from the info@governmentjobs.com email address. Insight Administrators will continue to have the option to have emails sent with the Recruiter name or Organization name in the From field.

- If your organization currently has 'Recruiter' or 'GovernmentJobs' selected, the option is being set to Recruiter. The recruiter's name will show in the 'From' field, but the email will be sent from info@governmentjobs.com. Replies will be directed to the recruiter's email address.
- If the organization is set up to have emails sent from a specific email address, the option is being set to Organization and we will use the previously specified email address for the organization's email and use the Agency Name for the Organization's name. Insight Admins can edit this as

desired. When an email is sent it will be sent from the organization name with an email address if info@governmentjobs.com. Replies will be addressed to the organization's email address specified in Agency Preferences.

Notices sent from the OHC Referred List will continue to be sent using the name of the user sending the email. However, they will be sent from the info@governmentjobs.com account. Replies will be sent to the user's email address.

For all notices, the verbiage currently displayed on notices stating the email address where replies will be sent has been removed.