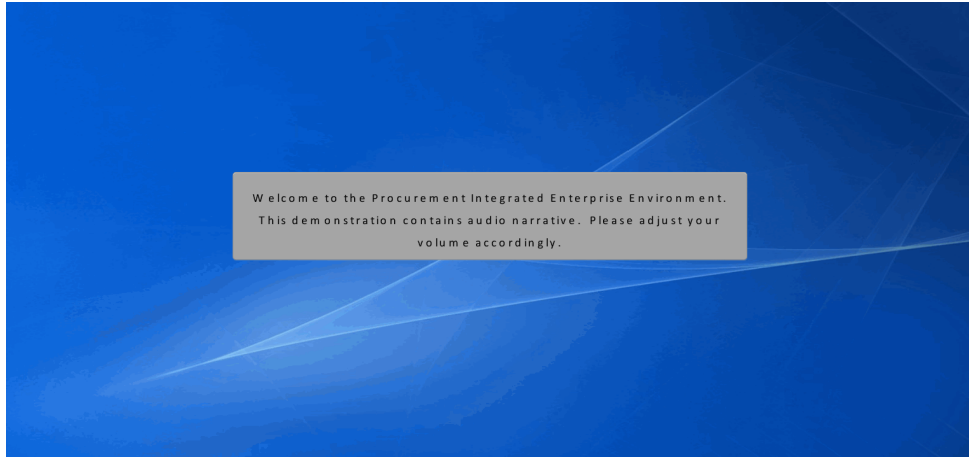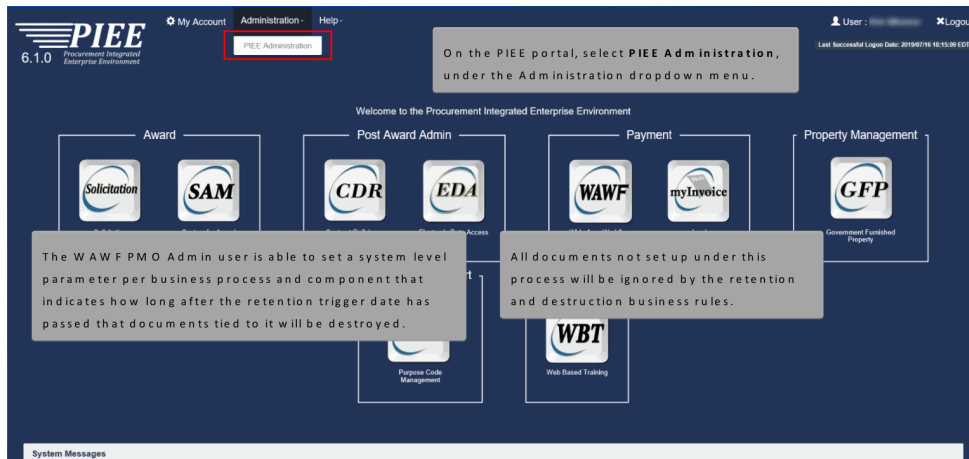## Intro


Welcome to the Procurement Integrated Enterprise Environment.
This demonstration contains audio narrative. Please adjust your volume accordingly.

Scene 2

The WAWF PMO Admin user is able to set a system level parameter per business process and component that indicates how long after the retention trigger date has passed that documents tied to it will be destroyed. All documents not set up under this process will be ignored by the retention and destruction business rules. On the PIEE portal, select PIEE Administration, under the Administration dropdown menu.
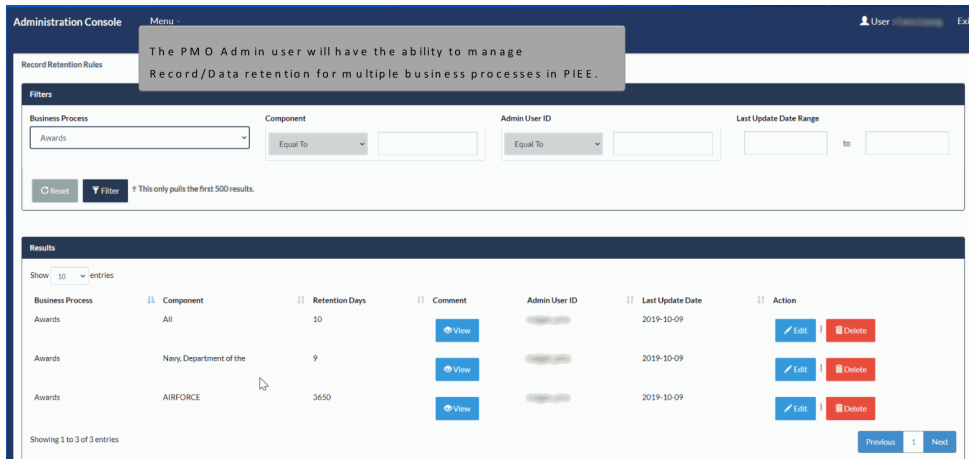
Scene 3
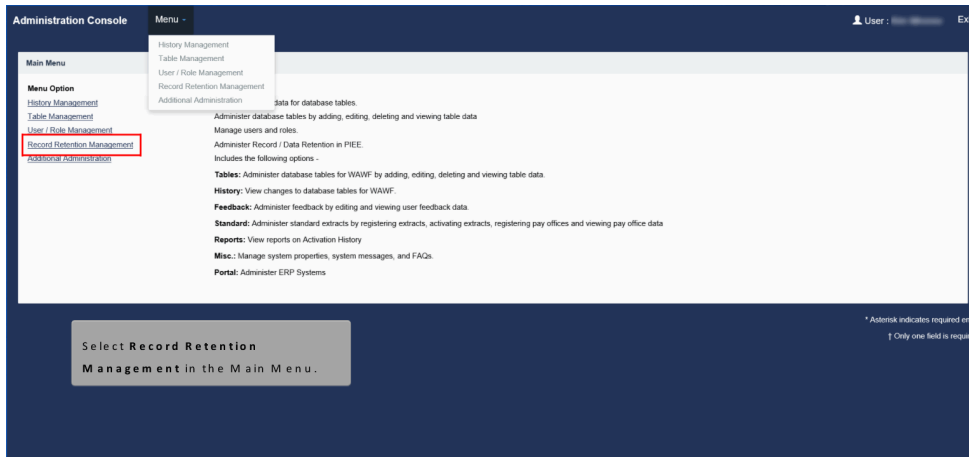
Select Record Retention Management in the Main Menu.
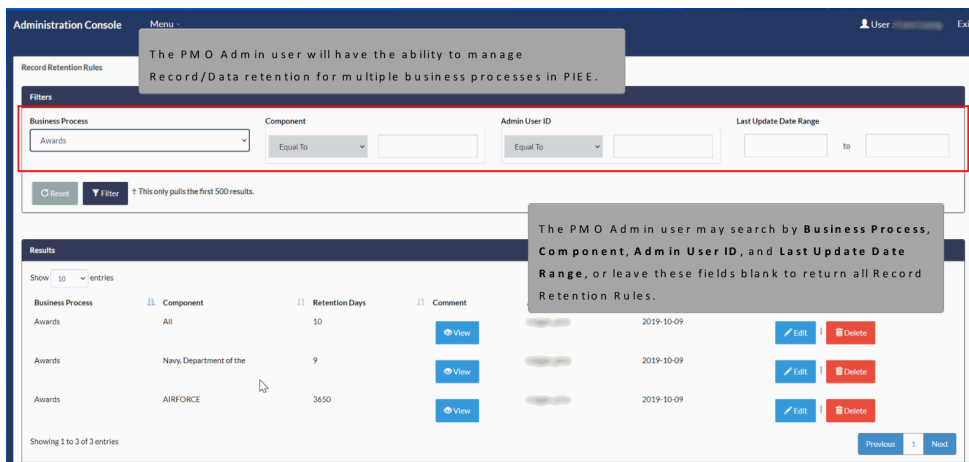
Scene 4

To view and manage the Record Retention rules for PIEE, select Record Retention Rules from the Manage Record Retention menu.
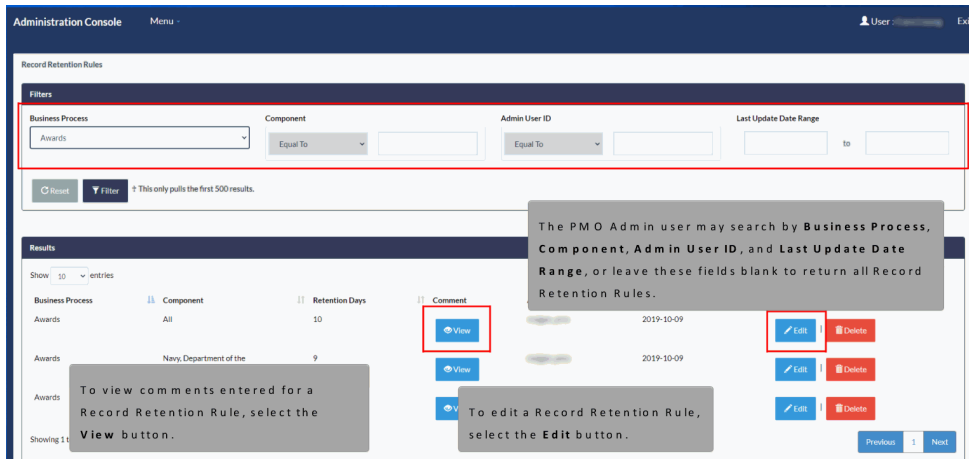
Scene 5

The PMO Admin user will have the ability to manage Record/Data retention for multiple business processes in PIEE.
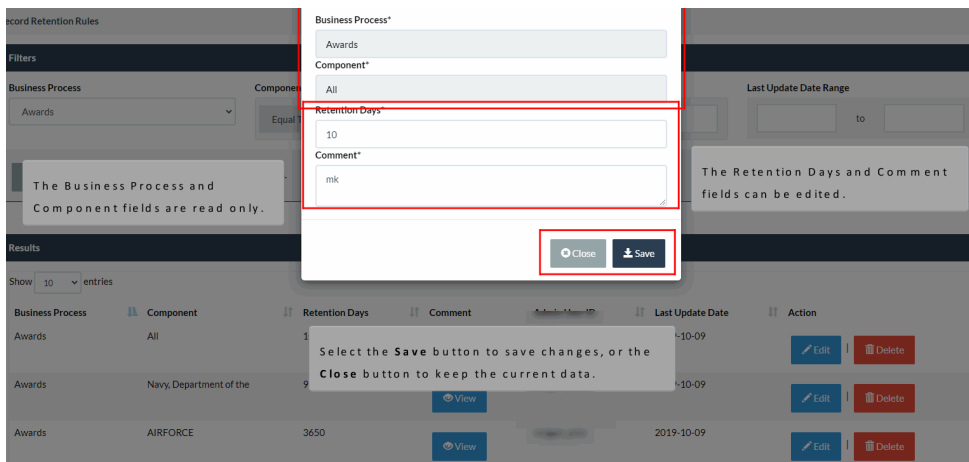
Scene 5

The PMO Admin user may search by Business Process, Component, Admin User ID, and Last Update Date Range, or leave these fields blank to return all Record Retention Rules.
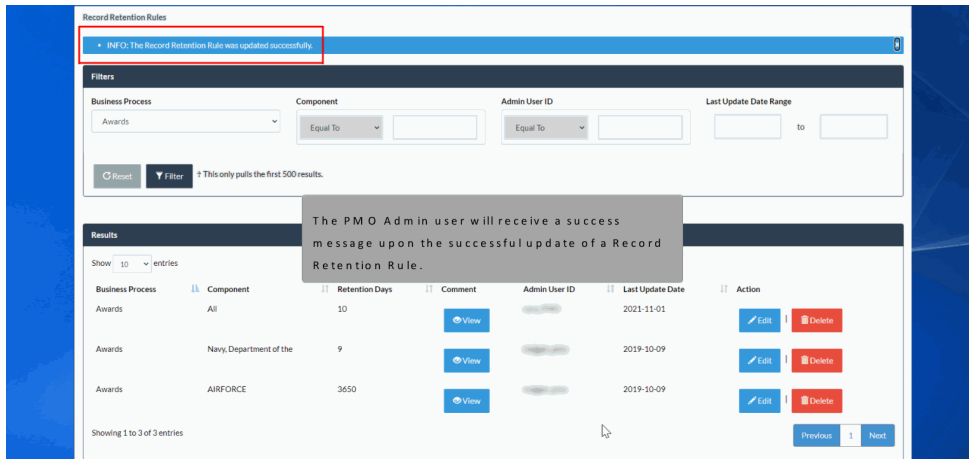
Scene 5

To view comments entered for a Record Retention Rule, select the View button. To edit a Record Retention Rule, select the Edit button.
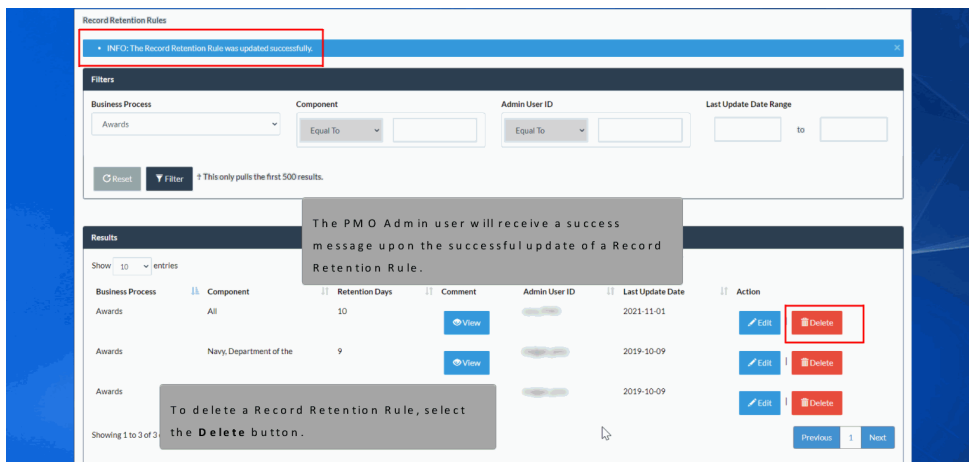
Scene 6

The Business Process and Component fields are read only. The Retention Days and Comment fields can be edited. Select the Save button to save changes, or the Close button to keep the current data.
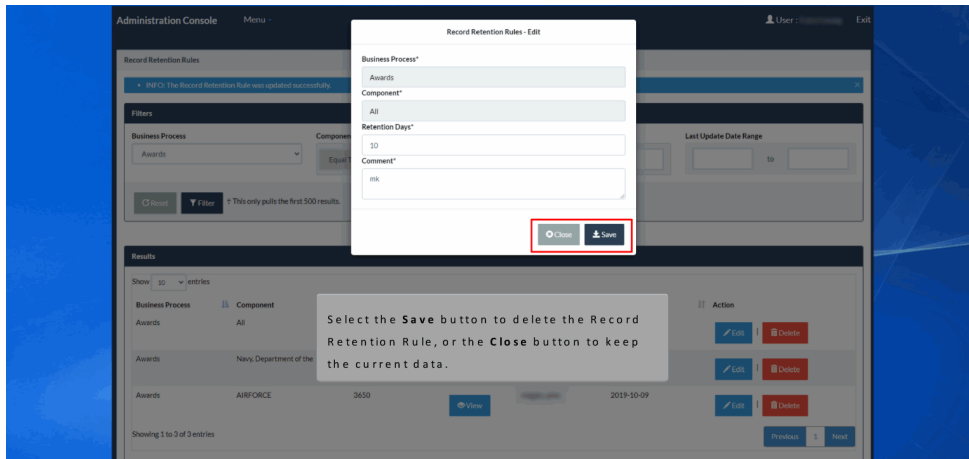
Scene 7

The PMO Admin user will receive a success message upon the successful update of a Record Retention Rule.
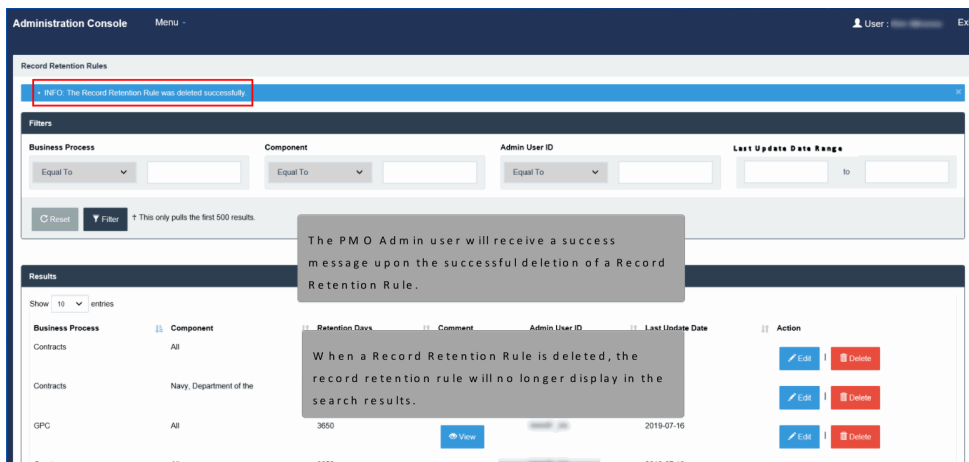
Scene 7

To delete a Record Retention Rule, select the Delete button.
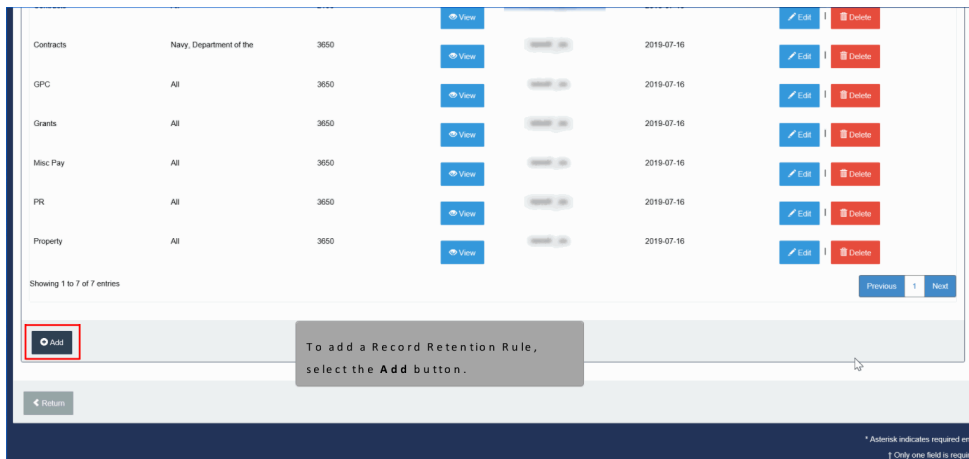
Scene 8

Select the Save button to delete the Record Retention Rule, or the Close button to keep the current data.
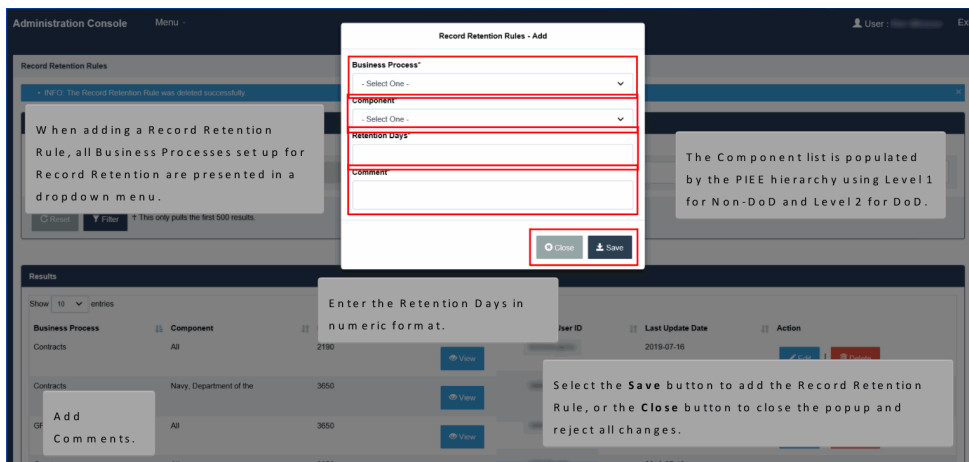
Scene 9

Last Update Date Range The PMO Admin user will receive a success message upon the successful deletion of a Record Retention Rule. When a Record Retention Rule is deleted, the record retention rule will no longer display in the search results.
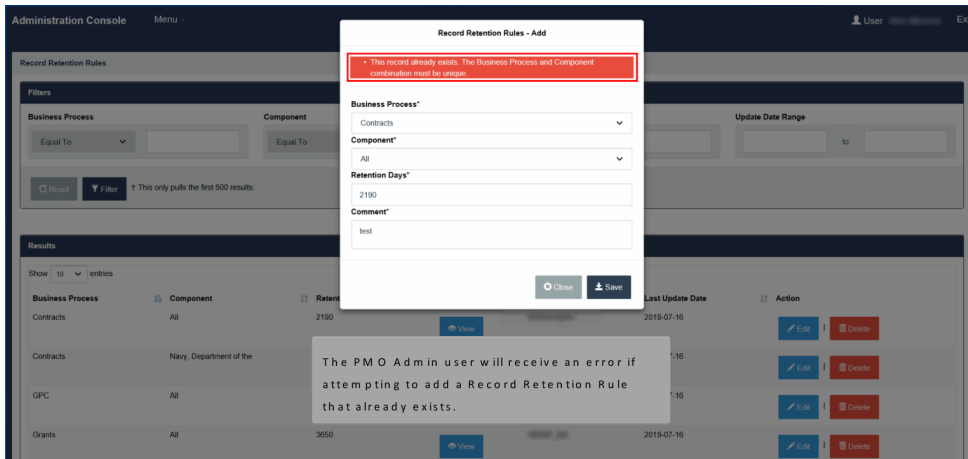
Scene 10

To add a Record Retention Rule, select the Add button.

Scene 11

When adding a Record Retention Rule, all Business Processes set up for Record Retention are presented in a dropdown menu. The Component list is populated by the PIEE hierarchy using Level 1 for Non-DoD and Level 2 for DoD. Enter the Retention Days in numeric format. Add Comments. Select the Save button to add the Record Retention Rule, or the Close button to close the popup and reject all changes.

Scene 12

The PMO Admin user will receive an error if attempting to add a Record Retention Rule that already exists.

Scene 13
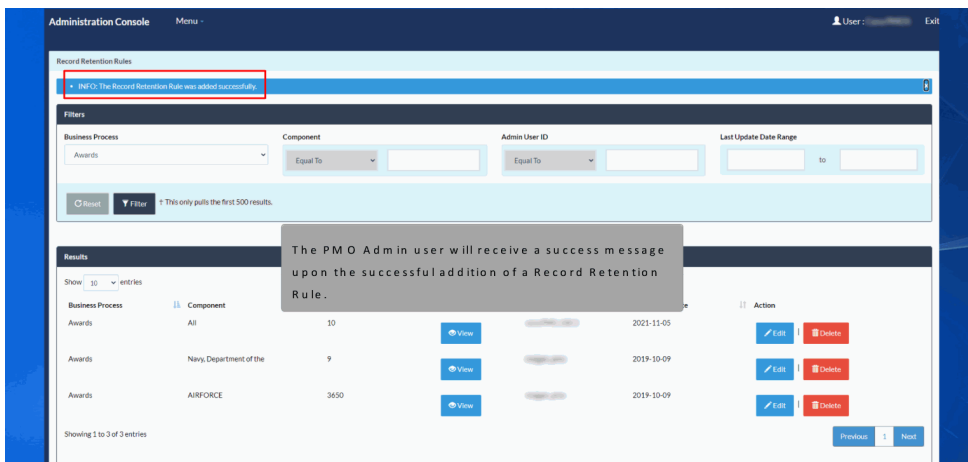
The PMO Admin user will receive a success message upon the successful addition of a Record Retention Rule.

Scene 14

The PMO Admin user will have the ability to manage the exclusion of specific Contract Numbers from deletion. To view and manage Record Retention Exclusions for PIEE, select Record Retention Exclusion Rules from the Manage Record Retention menu.

Scene 15
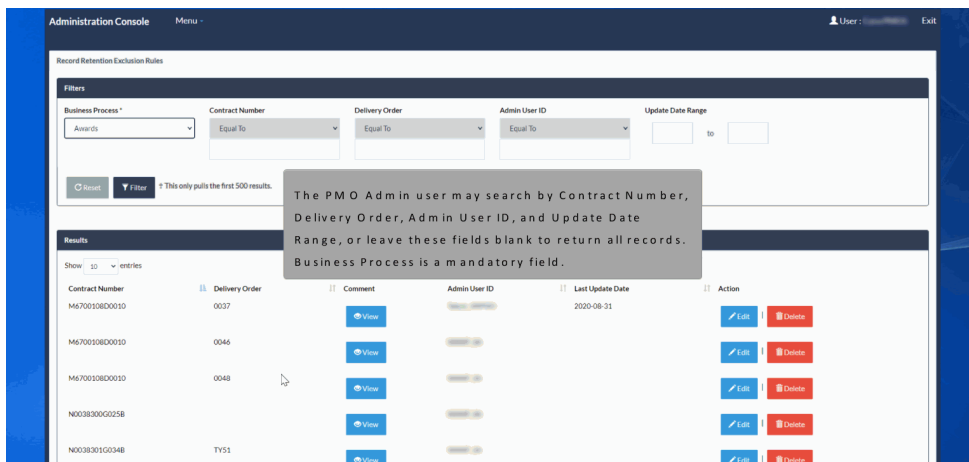
The PMO Admin user may search by Contract Number, Delivery Order, Admin User ID, and Update Date Range, or leave these fields blank to return all records. Business Process is a mandatory field.

Scene 15

To view comments entered for a Record Retention Exclusion Rule, select the View button. To edit a Record Retention Exclusion Rule, select the Edit button.

Scene 16

The Excluded Contract Number and Excluded Delivery Order fields are read only. The Comment field can be edited. Select the Save button to save changes, or the Close button to keep the current data.
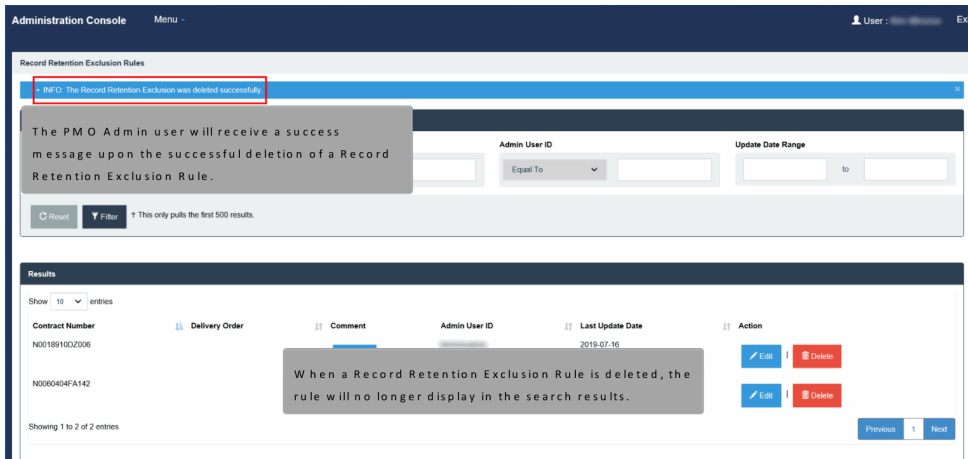
Scene 17
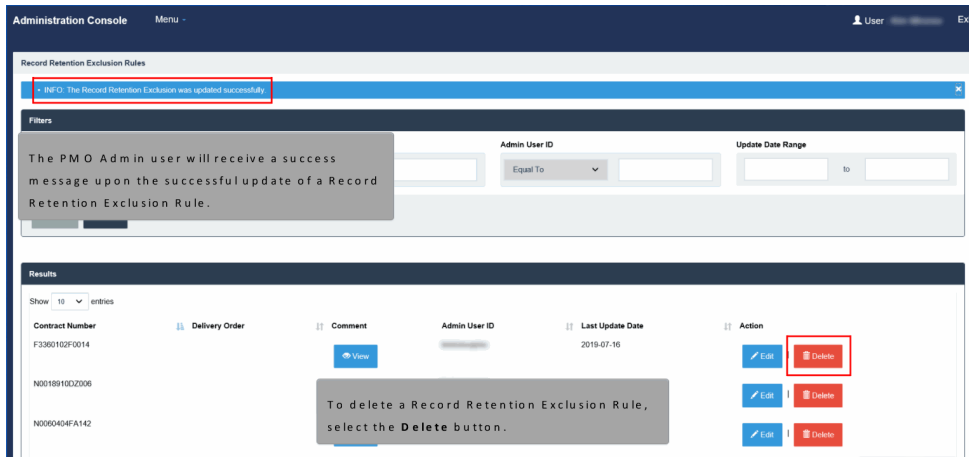
The PMO Admin user will receive a success message upon the successful update of a Record Retention Exclusion Rule. To delete a Record Retention Exclusion Rule, select the Delete button.

Scene 18
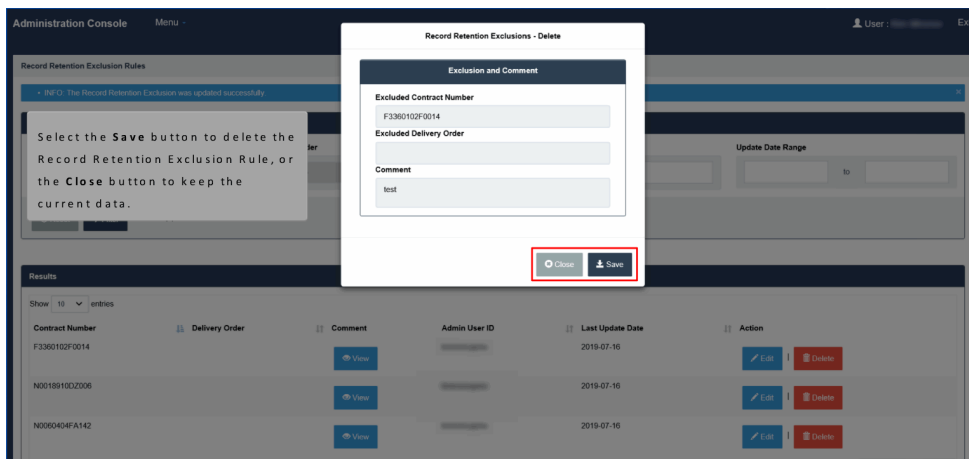
Select the Save button to delete the Record Retention Exclusion Rule, or the Close button to keep the current data.

Scene 19

The PMO Admin user will receive a success message upon the successful deletion of a Record Retention Exclusion Rule. When a Record Retention Exclusion Rule is deleted, the rule will no longer display in the search results.

Scene 20
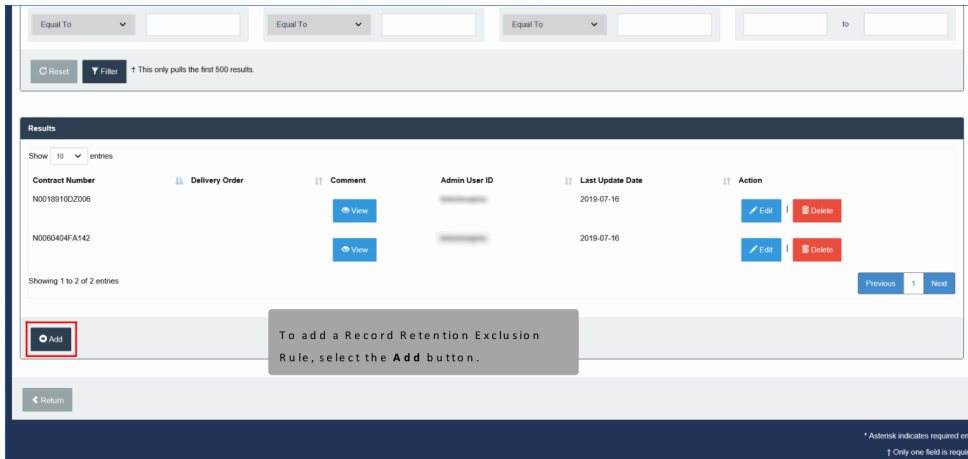
To add a Record Retention Exclusion Rule, select the Add button.

Scene 21
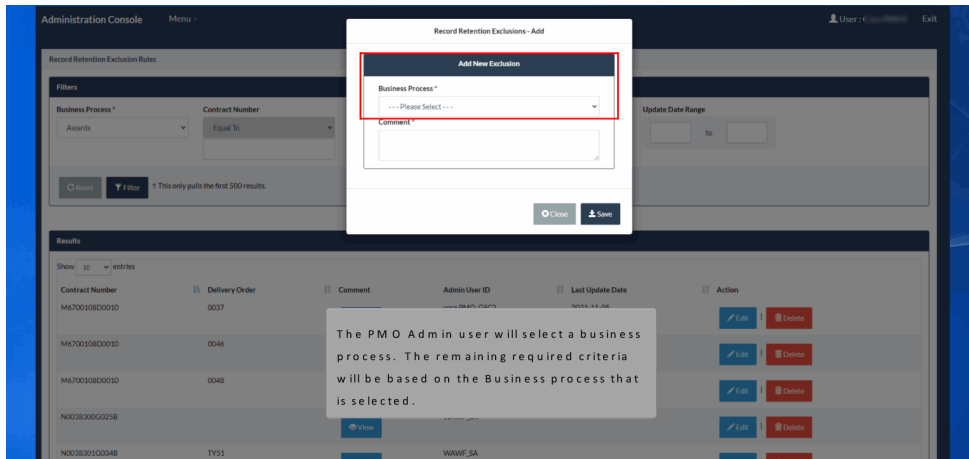
The PMO Admin user will select a business process. The remaining required criteria will be based on the Business process that is selected.

Scene 22
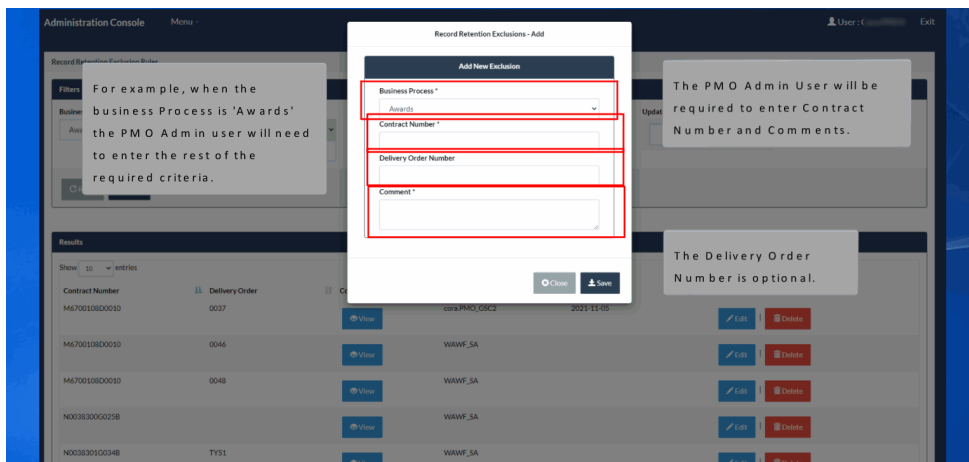
For example, when the business Process is 'Awards' the PMO Admin user will need to enter the rest of the required criteria. The PMO Admin User will be required to enter Contract Number and Comments. The Delivery Order Number is optional.

Scene 23
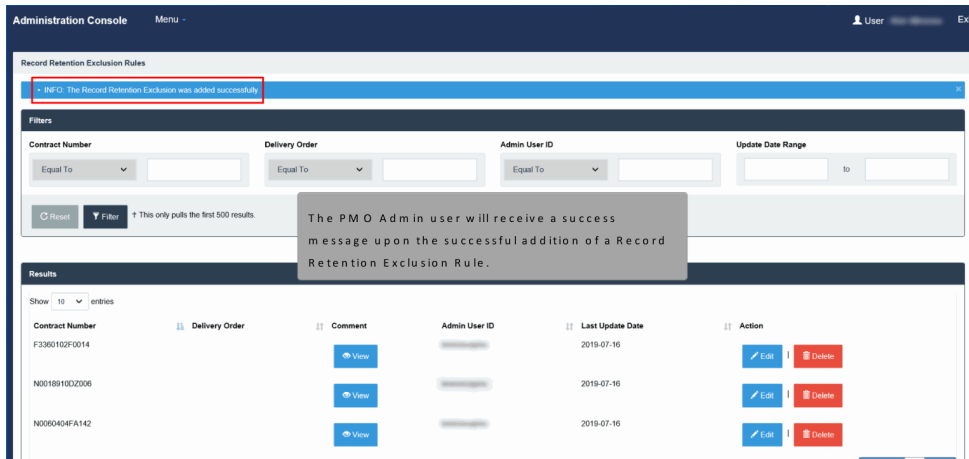
The PMO Admin user will receive a success message upon the successful addition of a Record Retention Exclusion Rule.

Scene 24
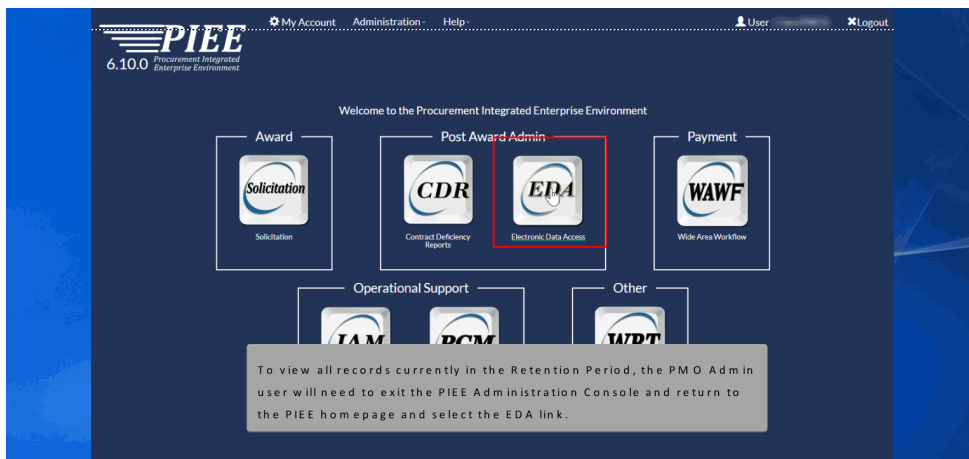
To view all records currently in the Retention Period, the PMO Admin user will need to exit the PIEE Administration Console and return to the PIEE homepage and select the EDA link.

Scene 25
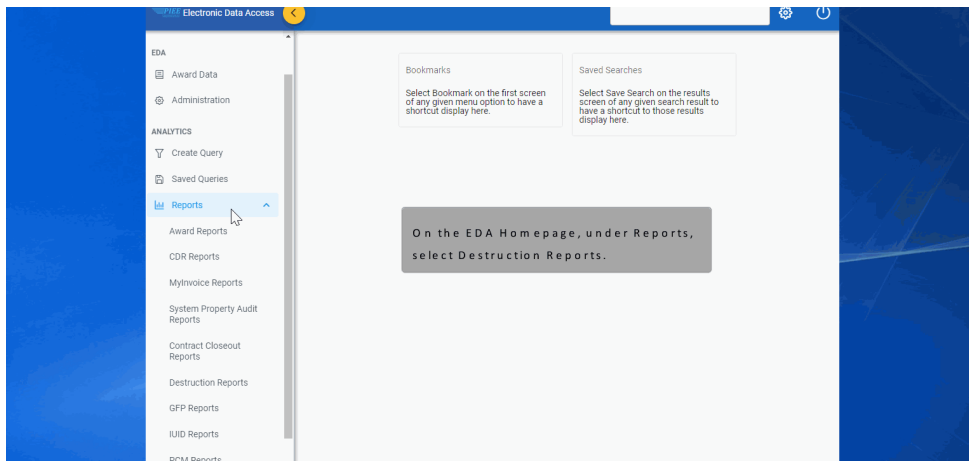
On the EDA Homepage, under Reports, select Destruction Reports.

Scene 25
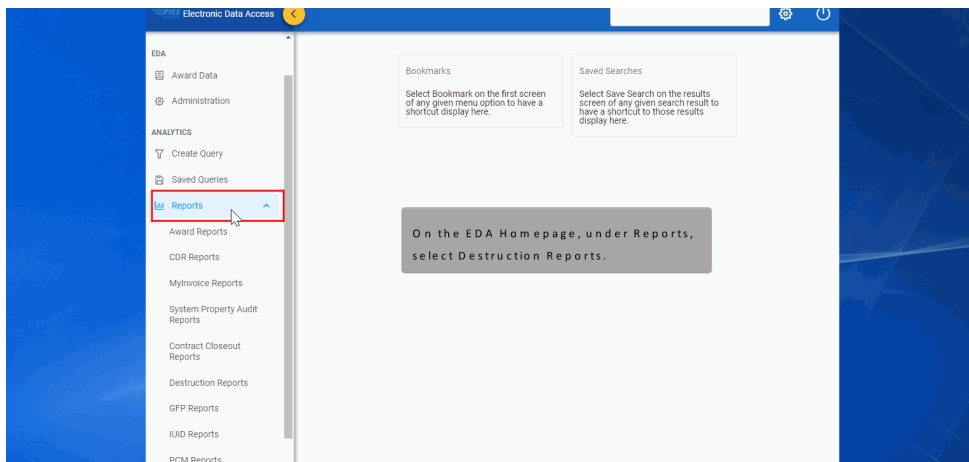
Scene 25
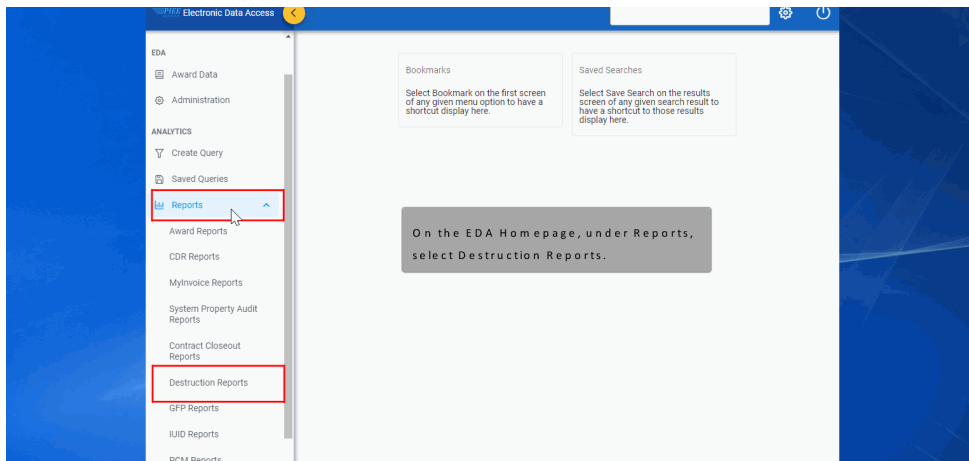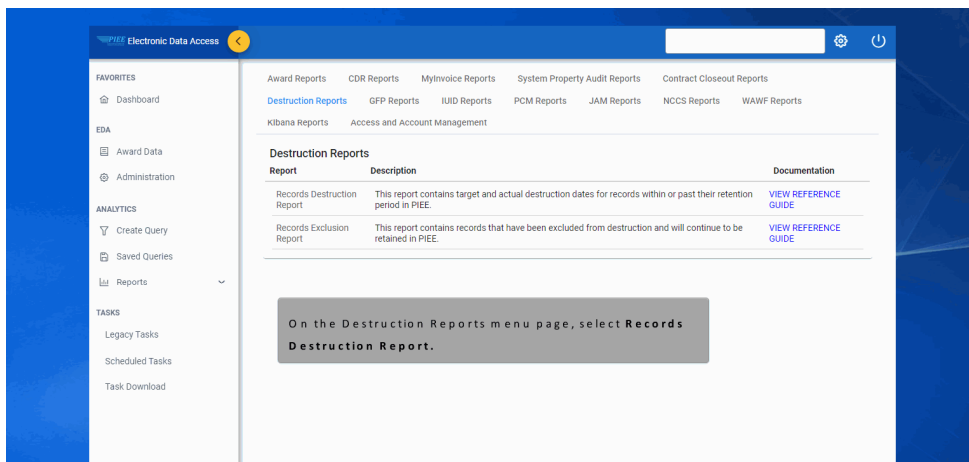
On the EDA Homepage, under Reports, select Destruction Reports.

Scene 26

On the Destruction Reports menu page, select Records Destruction Report.

Scene 26

On the Destruction Reports menu page, select **Records Destruction Report.**
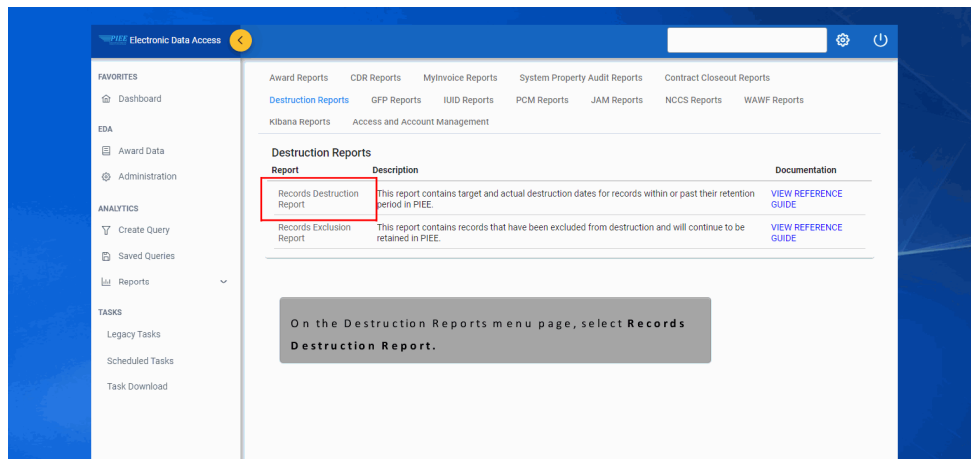
Scene 27
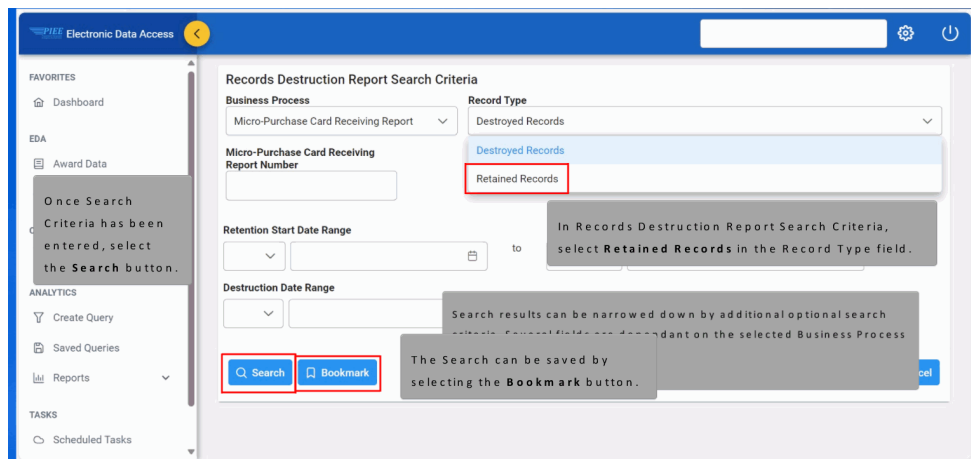
In Records Destruction Report Search Criteria, select Retained Records in the Record Type field. Search results can be narrowed down by additional optional search criteria. Several fields are dependant on the selected Business Process and Record Type. Once Search Criteria has been entered, select the Search button. The Search can be saved by selecting the Bookmark button.

Scene 28
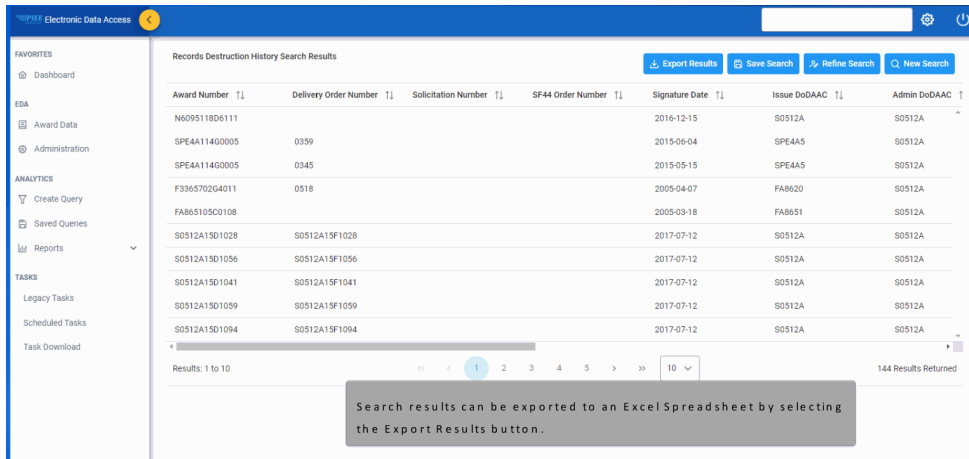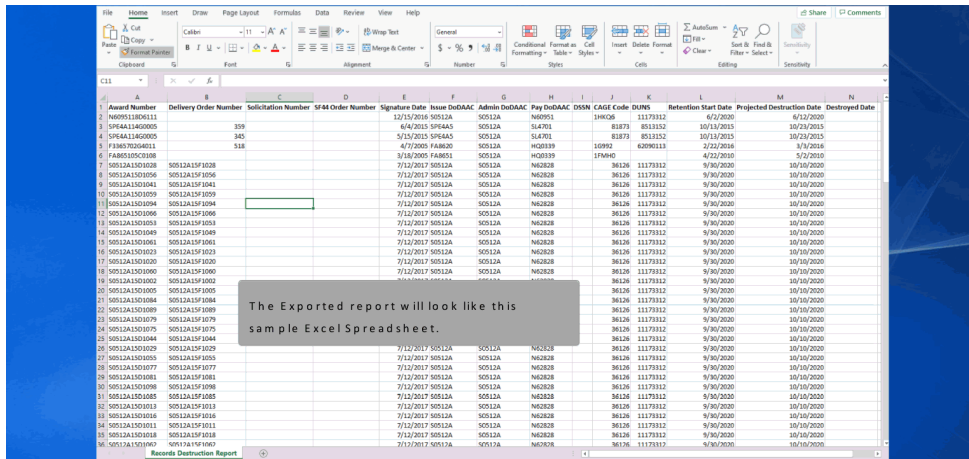
Search results can be exported to an Excel Spreadsheet by selecting the Export Results button.

Scene 28

Scene 29

The Exported report will look like this sample Excel Spreadsheet.

End

This concludes our demonstration.