

Data Retention Plan QE Creator

Project Master Table (pro_master) Backup & Purge

Back up Project master, Configuration Table and Attachments to offline access database following selection criteria based on Project Status and Date

- Bidding (0): Created over 365 days (12 months after Created)
- Awarded (1): Created over 365 days (12 months after Created)
- In Progress (2): KEEP UNTIL STATUS CHANGES
- Complete (3): Actual Complete over 120 days (4 months after Complete)
- Closed (5): Closed over 120 days (4 months after Closed)

Configuration Table (tbl_config) Backup & Purge

Back up Configuration Table and Attachments to offline access database following selection criteria based on Config Status and Date

- Not related to Project Master Record
- Ordered (4), Shipped (5) or Delivered (7): Order Date over 540 days (18 months)
- Quoted (10): Last Maintained over 270 Days (9 months)
- Initiated (1): Last Maintained over 180 days (6 months)
- All Other Status: Last Maintained over 120 Days (4 months)

When backing up Attachments exclude:

- Outlook messages
- Shop Floor image jpg
- System created Quote pdf

Tables Without Backup / Purge Only

- Error Log (tbl_err_Log): Event over 30 days (1 month)
- Print Log (tbl_Print_log): Time Stamp over 60 Days (2 months)
- Bucket Values (tbl_Bucket_Value): ETA over 60 Days (2 months)
- Scan Log (tbl_scan_log): Shipped over 120 Days (4 months)
- Transaction Log (tbl_trans_log): Shipped over 120 Days (4 months)
- QGTracker (tbl_QGT): Shipped over 120 Days (4 months)
- Glass Table (tbl_glass): Selection criteria
 - Not related to configuration containing User Defined Glass
 - Configuration Last Order Date over 60 Days (2 months)
 - Glass images & DXF are recreated by the configuration interface. These only affect the ability to print from a Dashboard, which is typically done within 7 days of order.

Tools Used

- QEC_DB Clean up Access linked database, Contains:
 - Select Queries for backup selection.
 - Program interface with modest instruction
 - Program routine to move selected items to offline Access tables.
 - Access has 2 gig size limits; multiple instances are often needed.
 - Program routine to Purge records after backup.
 - Backup & Purge routines behave in an iterated fashion,
 - Processes one record at a time
 - Displays feedback: Item X of total Items being processed.

Linked Database requires an ODBC connection to be set up to SQL Server.

- Microsoft SQL Server Management Studio
 - Collection of SQL code snippets for deleting non-backed up tables.
 - Code Snippet for Database Shrink & Log Truncate after deletions are complete.
- Possible improvement: Program code snips into a scheduled SQL Server job to run nightly.

Copy of the Access Cleanup Database and SSMS code snips stored on QE File Server.