

Archiving & Data Cleanup

Archiving

What is archiving and why do it?

- Archiving moves some information out of your main database into a separate database.
- It is used to section off historical information while keeping it readily available.
- It is part of a control process for your database, much like closing an accounting year or filing giving history.

So, what can you archive? *Pretty much anything!*

CDM+ Program Organization

CDM+ is a relational database program. This means much of the information in the different programs areas is interconnected. The advantage of this is that a change usually needs to be only made in one place. For example, if an address is changed in the Address records, then the contribution statements for the Giving Unit(s) connected to that family would be mailed to the new address. The charts on pages 13-14 of this section represent the inter-connectedness of the CDM+ database.

In archiving, it is very important to know the relationships of different records. In relational database programs, relationships are referred to as parent-child relationships. For example, an Address Record is a parent record. Individual Records are child records to an address record; Attendance Records are child records to Individual and Address Records.

When archiving parent records that have a relationship to child records, both the parent and child records are archived at the same time. For example, if you archive Attendance Records, only Attendance Records are removed. The archive utility will copy all of the related information needed for attendance (i.e., individual records, address records, master coding system), but will only remove the Attendance Records. However, if you archive out an Individual Record, CDM+ will remove ALL related Attendance Records (and all other child records of Individual Records) in addition to the Individual Records. The parent-child relationship of records is important to keep in mind so that you understand what is removed when you archive.

Archiving Considerations

When

Archiving can be done at anytime, but consideration needs to be given to certain reports that need to be generated at year end. Usually date-sensitive records, such as contributions, ledger entries, and attendance, are archived at the end of a calendar or fiscal year. It is helpful to leave the most recent 2-3 years of data in CDM+. Often, leaders want to look at reports during those periods for comparative reasons. It is easier to do that if they are in one database and not split between your current file and an archive file.

Membership records for deceased persons and those who have moved out of the church family are a different matter. CDM+ provides ways to keep those people in your active database, but not show up on reports. However, at some point, you will want to archive them out. If you need to report on deceased members and those who have transferred out for an annual denominational report, keep those records in your active CDM+ database until the report has been completed. This may require that you have multiple archive codes, such as one for 'Pending Archive' and another for 'Ready to Archive'.

Special Preparation Steps

For some records that will be archived, there are some other special considerations.

Before archiving attendance records, run the Update Attendance History function.

Before archiving contribution detail records, you need to run the Update History function. This stores totals of giving to each fund to provide dynamic information of financial support. The contribution history records are not compromised even if the giving units are archived out for people who are no longer in the church.

Before archiving ledger records, be certain that all ledger items have been cleared on bank reconciliation statements for the period to be archived. If there are any offsetting voided entries, check that both sides of the voided entries are in the records to be archived. Use the record skip feature of the archive utility to preserve both sides of a voided ledger entry. See "Setting up an archive" section below for more information on this feature.

Prepare Records for Archiving

The purpose of Archiving is to move obsolete or unwanted records from the active database to another database, but still have access to it. Archives are similar to the file cabinet kept in an archive room to store important papers away from daily use.

Address Records, Individual Records, and Visitation Records may be archived from the Membership program. Records to be archived must be selected during the Archive process by a Standard Search or an Advanced Find. This means the records must be identified by a code for searching. Examples of such codes are:

- Address Mailing Code – ex. "Ready to Archived"
- Individual Membership Status – ex. "Individual to be Archived"
- Visitation Record – ex. by Visitation Type and date range.

Last Name	Salutation Name	Address Line 1	Zip Code	Primary Phone
Bryant	Bill and Patty	4440 Westwood Dr	40123-2318	(606) 555-3584
Disney	Mike & Susan	107 Peachtree Dr Apt 2	40123	(606) 555-1739
Hunter	Mark & Andrea	3408 Rolling Terrace	40123	(606) 555-9112
Lucas	Ralph & Peggy	1299 Chatman Lane	40123	(606) 555-9177
McAllister	Osa	284 Main Street	40123	(606) 555-9998

Family Name Information

Order	First Name	Last Name	Family Status
1	Michael	Disney	Head of Household
2	Susan	Disney	Spouse
3	Robin	Disney	Child

Primary Address

Address: 107 Peachtree Dr Apt 2
City: Big City State: KY Zip: 40123
Mailing Code: Archive
Care Group: Shepherd Group 1 - Alex Adams
Carrier Sort: 01
Certified: MapQuest: Directory: Newsletter:

 One Archive database should be used to Archive all of your CDM+ data. There is no need to have separate Archive databases for membership, contributions, etc. Neither is there a need for separate Archives per year.

Membership records should be archived anytime after:

1. A backup of your CDM+ database has just been made.
2. Contributions and Attendance histories have been created.

Multiple Archive Database Sets vs. One Archive Database

CDM+ can handle an unlimited number of archive database sets. Although there is no set rule on the strategy of archiving everything from year to year into one archive set or creating separate archive sets for each year, *we recommend that you have just one archive database and add to it each year.* If you decide to have multiple archives, name the archive in such a way so that when you want to access it later, you will know which one to select. For example, you can create an archive file for all accounting records or one for each year of accounting records. For membership records, it is best to have one master membership archive file that you add to from year to year.

User Management and Login

During the archive process, the most recent user management files will be copied into the archive file. Once an archive is completed, it is a good idea for the administrator to go into the archive and set the access rights to read only, and perhaps limit who can access an archive file. It is also important to maintain password management in the archive file. If an employee leaves, you will want to remove them from archive files as well as your active database.

Archive Database Backups

Archive databases should also be backed up and a copy of the backup file maintained off site. Important and historical information is contained in archive databases, so treat them accordingly. Since archive databases change infrequently, they are well suited to backing up to more permanent media such as a CD.

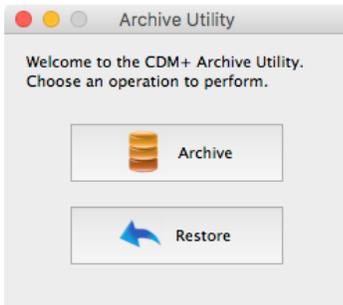
The Three Options in CDM+ Archiving

1. **Standard Archive** – This function will copy the selected data to the archive file and delete the parent and child records from the active CDM+ database.
2. **Copy Only** – This function will copy the selected data to the archive file and NOT delete the parent and child records from the active CDM+ database.
3. **Delete Only** – Although an archive database is selected, this function WILL NOT copy any data from the active database into the archive file. This function WILL delete the parent and child records from the active database. **USE WITH CAUTION.**

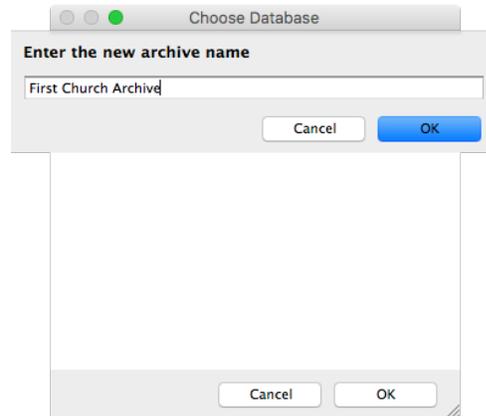
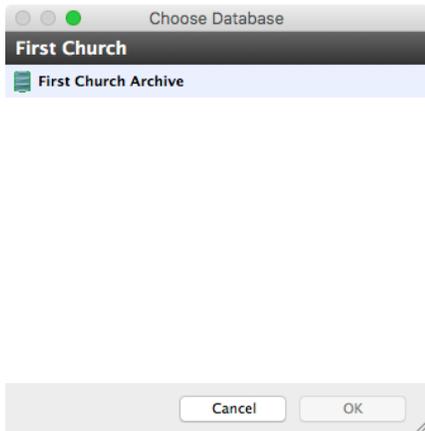
Archive Process

1. Prep your database:
 - Update Contribution and Attendance Histories.
 - In Accounting Ledger:
 - 1) Complete Bank Reconciliations, clearing ALL appropriate entries.
 - 2) Close all months and years to be archived.
 - In Membership, mark Address and Individual records to be archived with a archive code.
2. Back up your active CDM+ database.
3. Decide whether to create a New Archive or to Archive to Existing file.
4. Select which records to archive.
5. Check the archive preview and settings.

►File ►Archive



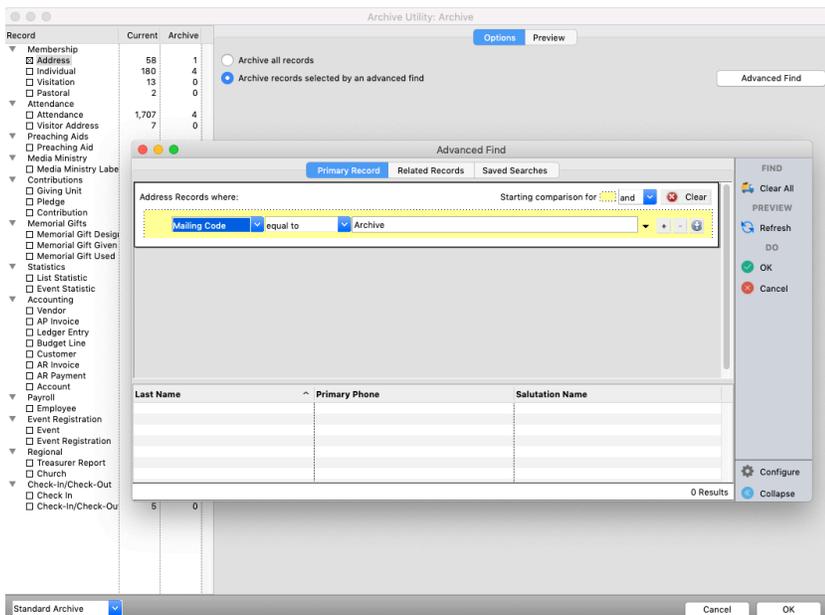
1. Click the Archive button.
2. Click to select either an existing archive database or create a new archive database. Click OK.
3. If creating a new database, enter the name and click OK.



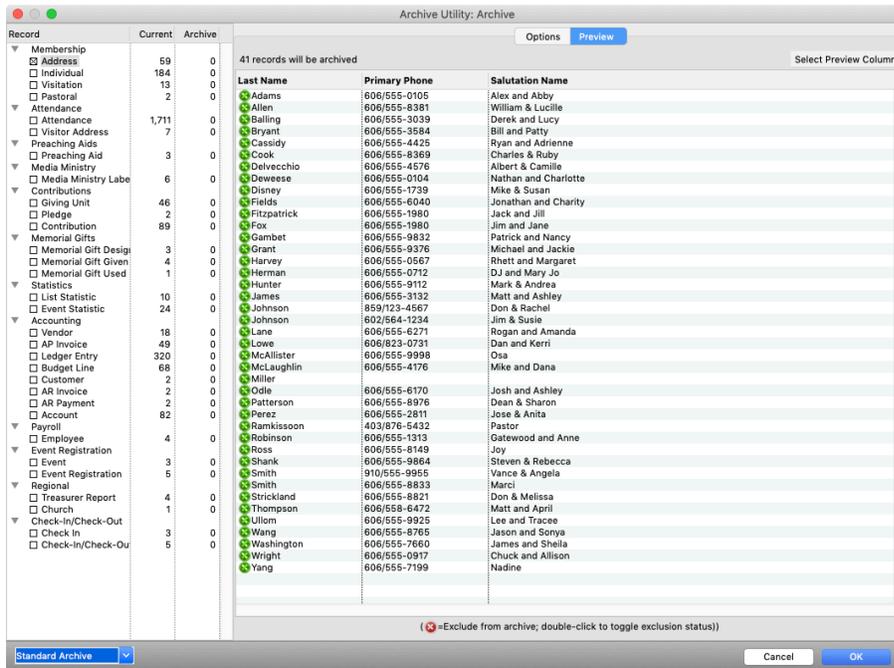
Setting up an Archive

1. Check a record type to archive (e.g. Address Records).
NOTE: You will only see record types for which you have data in CDM+.
2. Choose Archive All, Advanced Find, or Standard Search.
3. Configure the Advanced Find or Standard Search.

Example of a Membership archive:



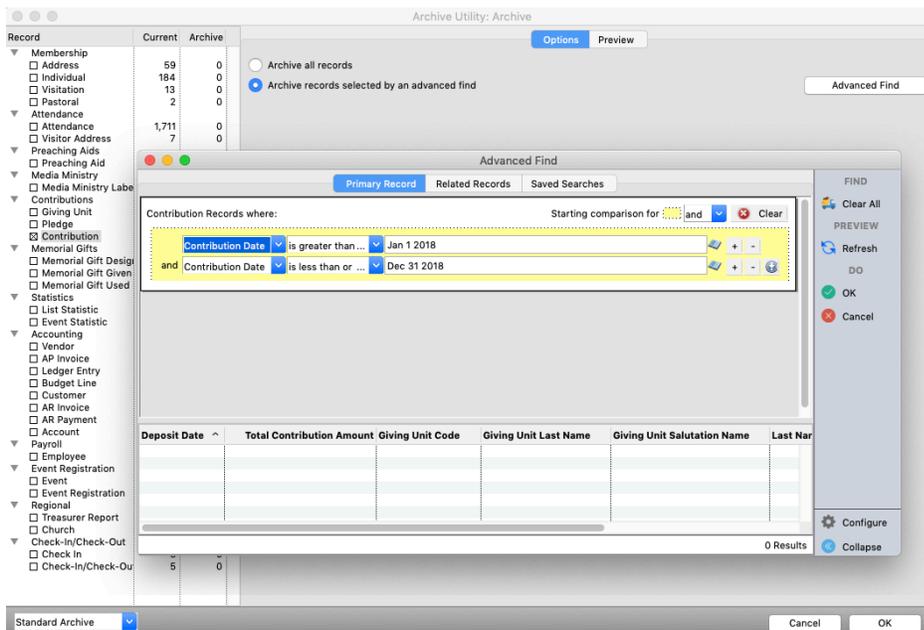
- Select Preview to see records to be archived.
- Double-click a record to exclude it from the archive.



- Choose the Archive Mode from the drop-down field; *be intentional*.
 - Standard Archive** to move data to the archive file and remove from the main file.
 - Copy Only** to move data to the archive file and leave in the main file.
 - Delete Only** to remove data from the main file. **THIS WILL PERMANENTLY DELETE YOUR DATA.**
- Click OK and verify that you've selected the right records by clicking Continue.

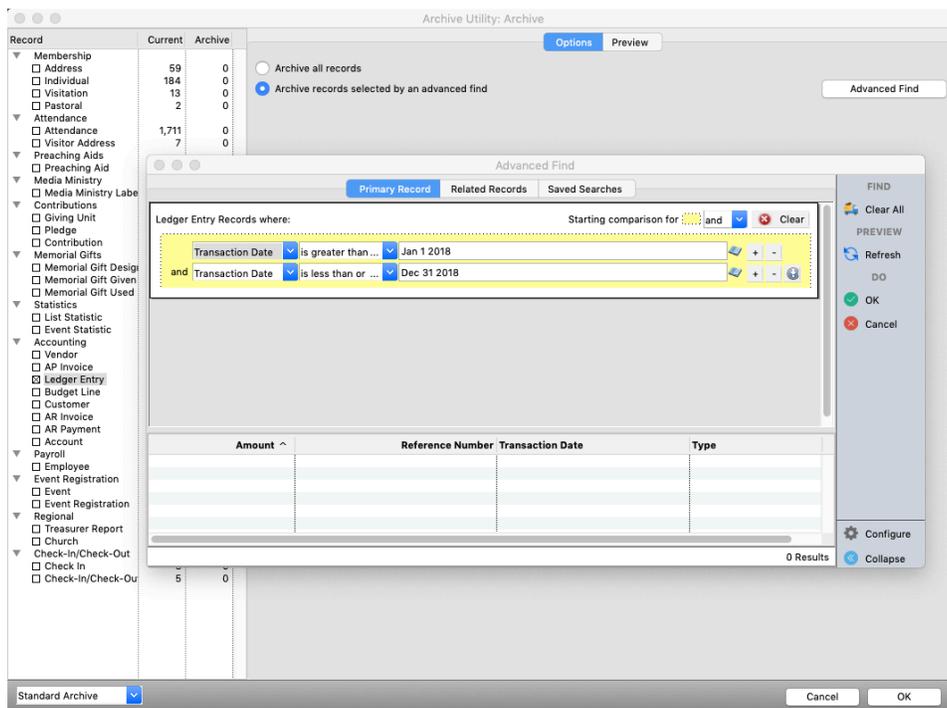
Setting up a Contributions Archive

Example of Contribution entries to archive selected by Standard Search – Date Range

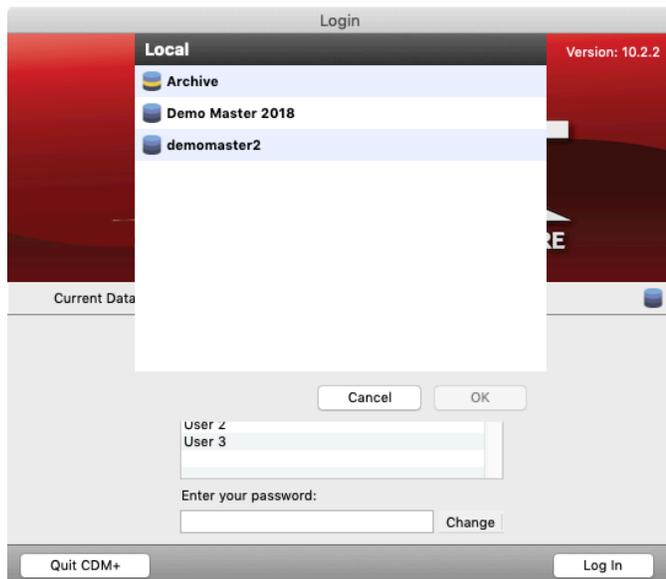


Setting up an Accounting Archive

Example of Ledger Entries archive selected by Standard Search – Date Range



Accessing Archived Data



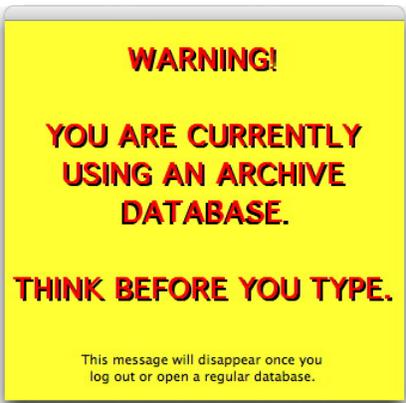
On the login screen, click the database icon  to the right of Current Database.

Click to select the archive database you wish to open. Archive databases have bluish-green icons to distinguish them from current databases that have golden icons.

Note: Archives made in previous versions of CDM+ may need to be converted to the current version before you can access them. Contact CDM+ Tech Support for assistance.

Then, click OK and log into CDM+.

When accessing an archived database, you have all the functions of CDM+ available to you. If some functions are not active, then your User Management record settings has limited your access. Contact your CDM+ administrator for assistance.



While you are working in a CDM+ archive file, a big bold yellow box will remain on your screen to remind you that you are in an archive file. You can move this box as needed by clicking on its top bar and dragging with your mouse button held down.

To exit the archive database and return to the active CDM+ database, select Logout from the File menu or simply exit the CDM+ application. The next time you launch CDM+, your normal login screen will appear.

Restoring Data from an Archive Database

You can restore data from an archive database back into your active CDM+ database. *This action should only be done with extreme caution.* If you intend to restore ledger entries and there have been significant changes to the Chart of Accounts, then undesirable results may occur. Before restoring archived data, always be certain to have a valid **BACKUP OF YOUR ACTIVE DATABASE.**

SPECIAL NOTE ABOUT PROGRAM VERSIONS: If you are upgrading and converting data from an earlier CDM+ version, it is strongly recommended you archive **AFTER** you convert. This will allow you to restore from the archive file, if need be. **DO NOT ATTEMPT TO RESTORE DATA FROM AN ARCHIVE CREATED IN CDM+ 8.0 OR EARLIER.** If you must access a CDM+ archive created in a version prior to CDM+ 8.1, contact CDM+ Tech Support for assistance. We suggest that each time you upgrade your main CDM+ database, you also upgrade any archive databases so they remain accessible in the CDM+ version you are currently running.



To restore data select Archive from the File menu and click the Restore button.

Select the archive database and click OK.

Select the records you wish to restore, just as you did in archiving them. Then, make sure you have set the Archive Mode from the drop list in the lower left. Click OK.

Before restoring the archived records, CDM+ will ask you to confirm your selection. If it is correct, click Continue.

