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 toward the end 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.

You should also process any Pending Contribution records prior to updating contribution history and archiving. This ensures all giving is accurately recorded.

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.

You should also process any Deposits in Deposit Processing before archiving. This ensures you have complete ledger activity. Moreover, CDM+ will prevent you from archiving certain records if they link to un-processed deposits. See the Online Payment Processing section of this manual for more information.

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 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.

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 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.

Timing Your Archive

It is recommended to archive during a low-volume time for your organization and also early in the day. This will ensure a recently nightly backup and minimal changes to your data when archiving.

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:
    - Process Pending Contributions.
    - In Accounting Ledger:
        1) Process Online Deposits.
        2) Close all months and years to be archived.
    - In Membership, mark Address and Individual records to be archived with an archive code.

2. Decide whether to create a New Archive or to Archive to Existing file.

3. Select which records to archive.

4. Check the archive preview and settings.

▶File ▶Archive
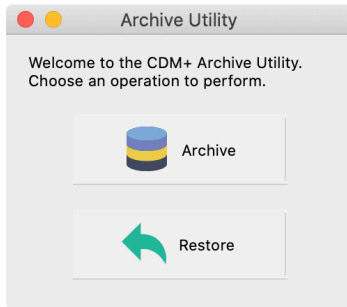
1. Click the Archive button.

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.
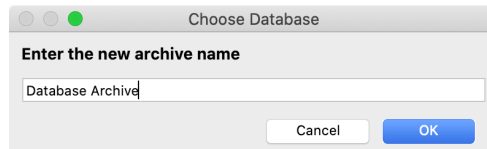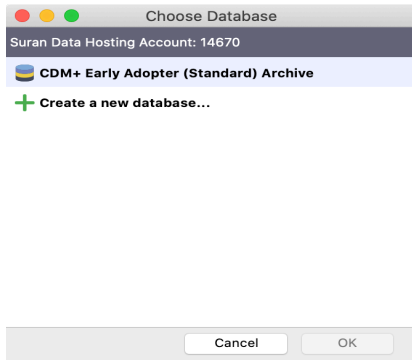
Setting up an Archive

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 or Advanced Find, if using.

3. Configure the Advanced Find.

Example of a Membership archive:
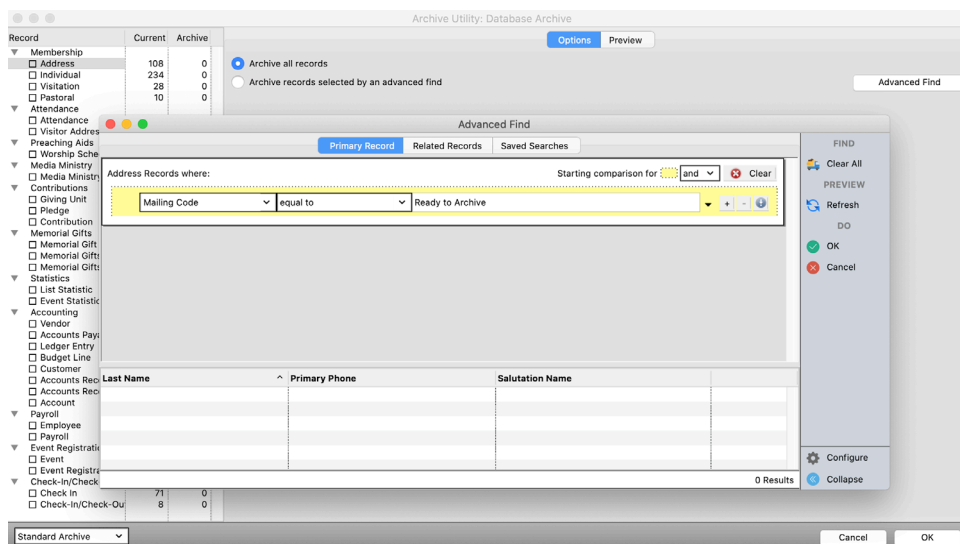
4. Select Preview to see records to be archived.

5. Double-click a record to exclude it from the archive.
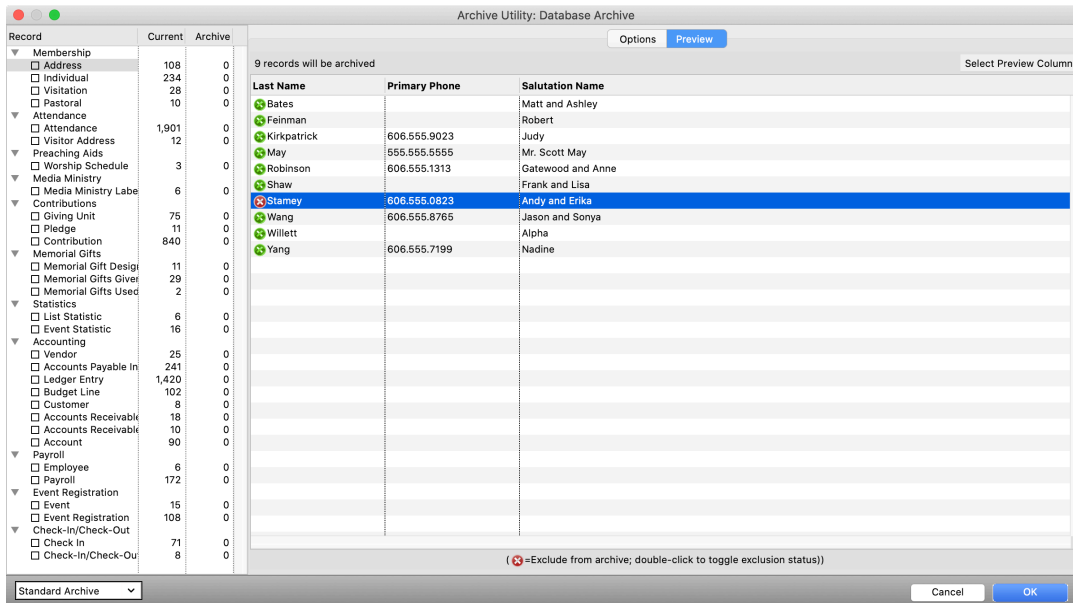
6. Choose the Archive Mode from the drop-down field; *be intentional*.

    a. **Standard Archive** to move data to the archive file and remove from the main file.
    b. **Copy Only** to move data to the archive file and leave in the main file.
    c. **Delete Only** to remove data from the main file. **THIS WILL PERMANENTLY DELETE YOUR DATA.**

7. 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
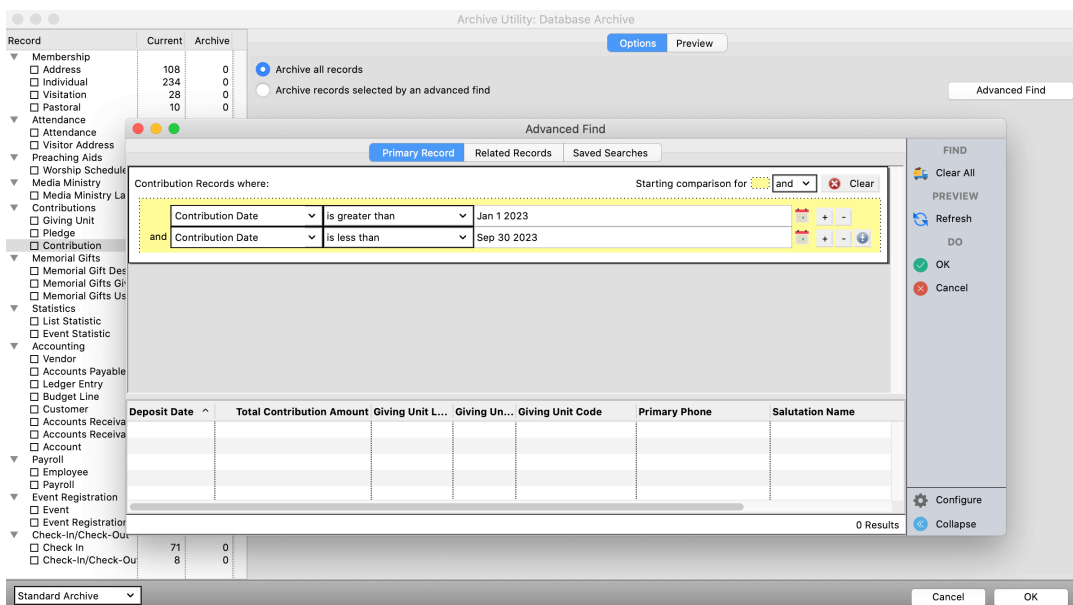
Setting up an Accounting Archive

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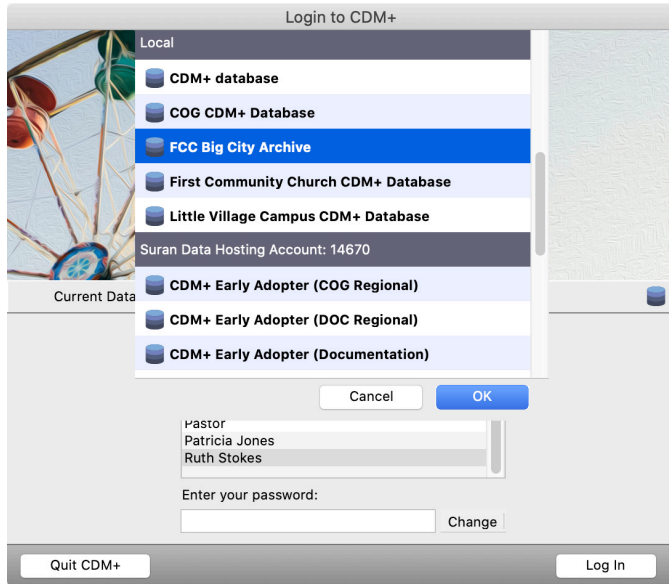

Archive Backups

Before archiving you may be prompted to back up your database. Hosted databases are automatically backed up each night, but it is recommended to take a separate backup before archiving especially if your database has been used that day (including activity from CDM+ Mobile and CDM+ Engage).

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 updated to the current version before you can access them. Follow the on-screen prompt to update the archive database. This will require user credentials with permissions to update a database.

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.
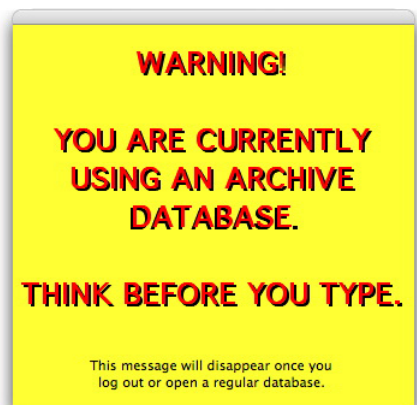

While you are working in a CDM+ archive file, a bold yellow box will remain on your screen to remind you that you are in an archive file. You can move this box as needed by clicking on its top bar and dragging with your mouse button held down.

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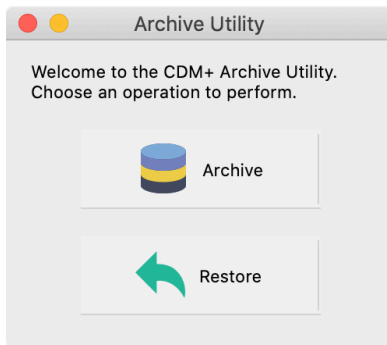
To restore data select Archive from the File menu and click the Restore button.

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.
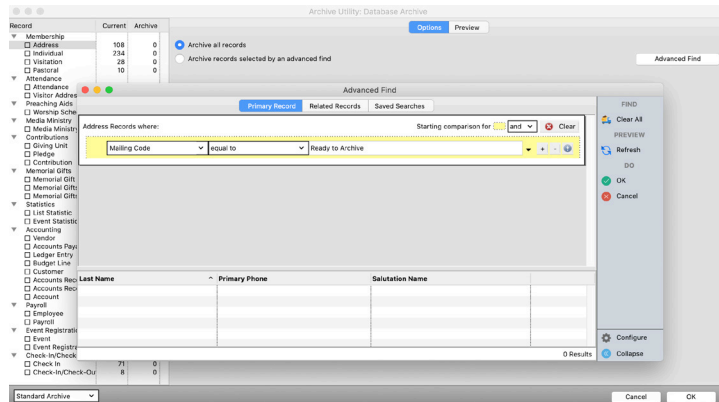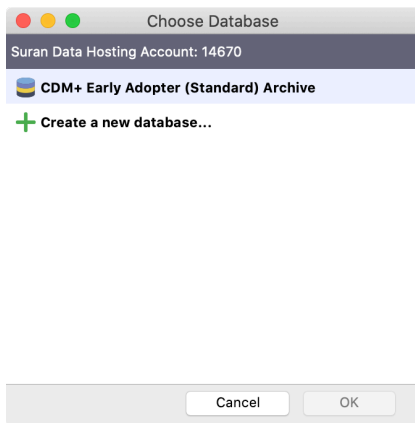
Data Cleanup

Over time, changing personnel and policies can create inconsistencies in your data. Mixed coding, duplicate records, and varying data styles make it difficult to query and pull useful and accurate information from CDM+. If your data isn't accurate, your organization may turn to additional, disconnected tools to replace existing systems like CDM+, thereby creating more manual work and actually increasing inaccuracy in data across systems. Ensuring your data is consistent, accurate, and easy to access will have measurable positive effects on understanding trends and truths about the life of your organization.

Bulk Updates

CDM+ contains a number of tools for making bulk updates to your data. In addition, the Suran Data Services team can assist with custom database cleanup, within reason. The first, and most important step is to identify what changes to make. With that knowledge in hand, there is likely a tool or technique to make those changes in bulk.

Each situation is unique, but here are several examples for how to make bulk changes in CDM+. Use these examples to understand what is possible, and contact the support team for assistance with your particular needs.

Use the Grid to Make Fields Consistent

The Grid feature of record windows in CDM+ offers a powerful spreadsheet-like interface for working with you CDM+ data. Use the grid to:

- Change data within fields
- Clear fields
- Set fields to a common value
- Edit specific values

For example, you can use the grid on Address Records to standardize salutation names to use an ampersand.

Program ▶ Membership ▶ Address Records

Begin by finding records where the Salutation Name contains " and". Use a leading space to avoid finding names like Andrews or Anderson.
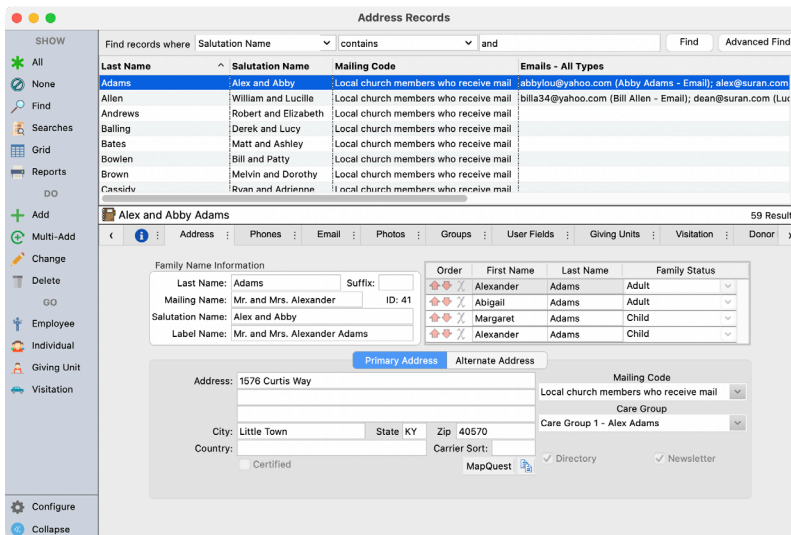
Click Grid in the sidebar. If the Salutation Name column isn't displayed, use the Configure button to add it.
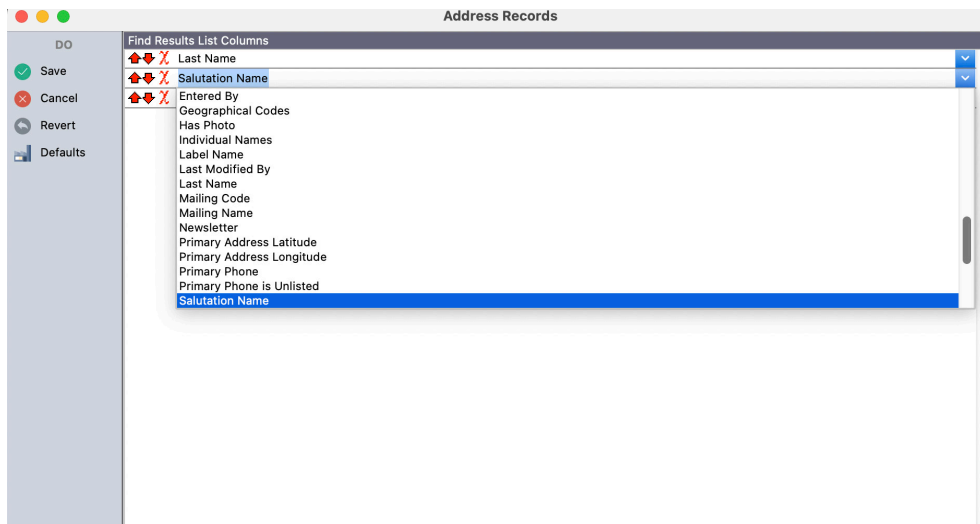
Click the header for the Salutation Name column to select that column. Click Find and Replace and enter " and " for the text to find, and " & " for the replacement text. Be sure to add leading and trailing spaces.
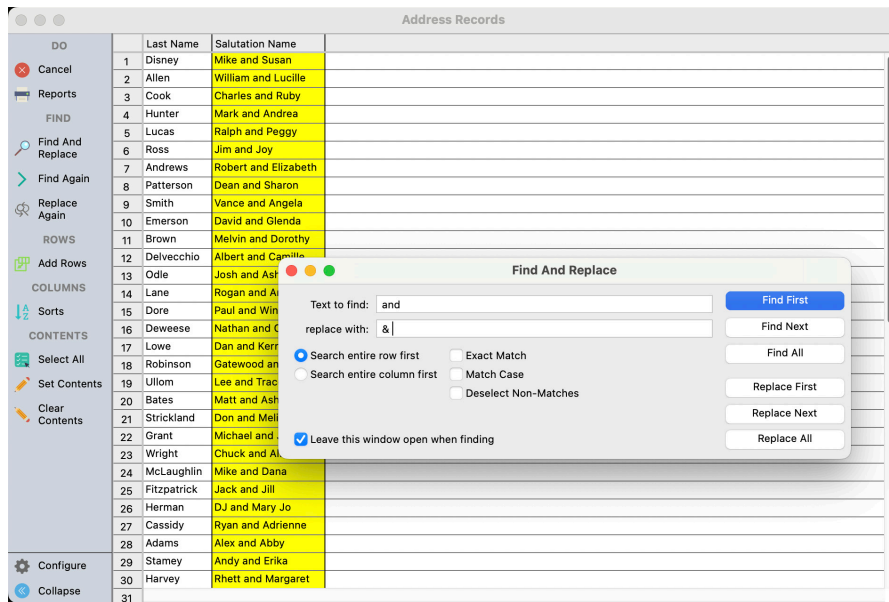

Click Replace All to perform the replacement. Review the changes and click Save to save them. You can also edit individual values in the grid by double-clicking a cell to make targeted updates.

Use Field Maintenance to Swap Columns

Say that you have mixed usage of Address Lines 1 and 2 in Address Records and want to consistently use Address Line 1.

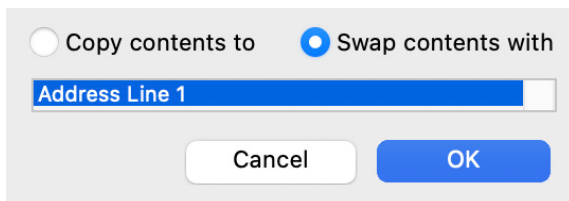**Program ▶ Membership ▶ Address Field Maintenance**

Use the advanced find to locate records where Address Line 1 is empty and Address Line 2 is not empty.
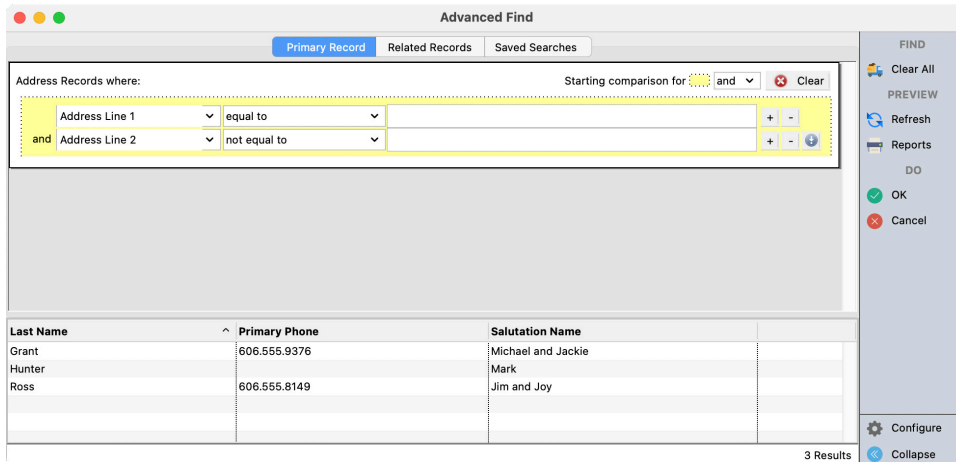
Click Add Field and add Address Line 1. Repeat for Address Line 2.
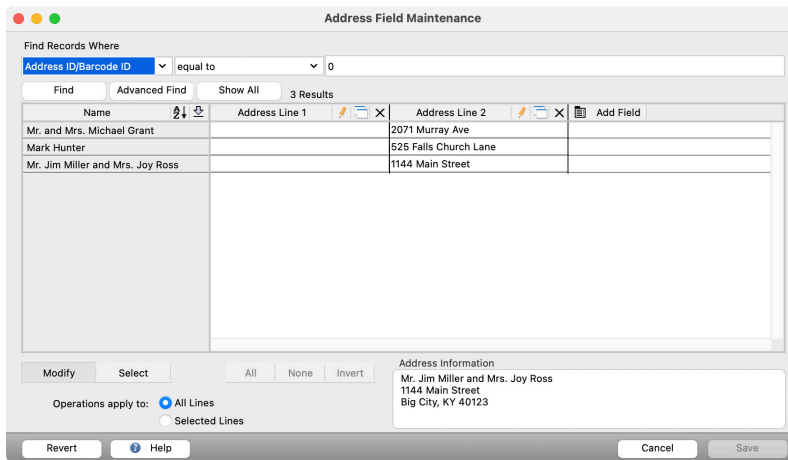
Click the Swap/Copy button and swap the two columns.

Merge Giving Funds

Merging is available on a number of record windows. Giving Funds has a special merge utility available under Special Functions.

File ▶ Utilities ▶ Merge Giving Funds

Select the destination fund and check source funds. There are special options to handle pledging or to only merge activity during a data range.

Use List Maintenance to Merge Duplicate Codes

See Chapter 3 for Membership Data Management for help using List Maintenance. A helpful tool to determine if a code is in use is the Usage list on the Master Coding System.
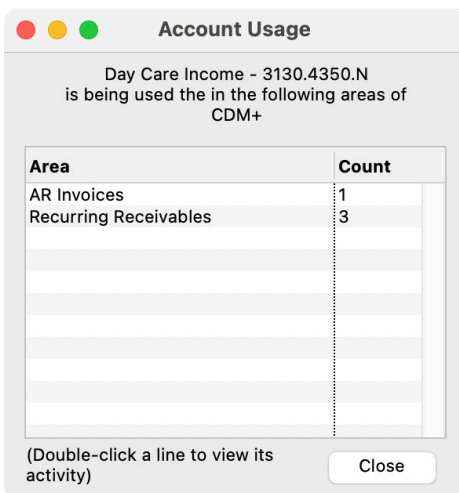
Chart of Account Changes

If you want to make changes to your chart of accounts, a good process to follow is:

1. Identify a cut-over data to stop using the old account(s) and start using the new one(s). The beginning of an accounting period is a good time for this

2. Add the new account to your chart of accounts

3. Finish recording activity to the old account up to the day of the cutover

4. Create a journal entry on the day before the cutover to transfer the balance of the old account to the new account

5. Mark the old account inactive in your chart of accounts

6. Begin using the new account

7. Periodically run Ledger by Account activity to ensure the old account isn't being used

8. After a minimum of one full fiscal year of not using the old account, archive activity to the old account

9. Delete the old account from the chart of accounts

Try using the Account Usage on the Chart of Accounts window to find where an account has been used.

Guidelines for Data Cleanup

In general, data cleanup begins by identifying three topics:

1. What records and/or fields need to be cleaned up? Identify where problematic data is so you can locate it.

2. What is the desired outcome? Describe how the data should look after it's cleaned up.

3. How did the discrepancy occur? This will help you establish procedures to prevent further issue.

Once you know these items, you can ask the question of how to effectively locate problematic data (1) and transform it to the desired state (2). If you are unsure of how to do this, contact the support team! If you can articulate items 1 and 2 chances are we can help with the cleanup.

Staying Accurate

Data cleanup is the first step towards ensuring accurate and valuable data. The broader solution is to ensure consistent data entry. Here are some ideas to ensure you keep your CDM+ database useful and clean.

1. Use written policies to train new staff on how to use CDM+

2. Hold periodic refreshers to review and update policies

3. Limit user access to create new codes, categories, etc.

4. Avoid using abbreviations to ensure clarity and avoid duplicate data entry.

5. Establish a system for periodic data review to ensure data is accurate and to identify the root cause when it's not

6. Come to the CDM+ Conference to learn great tips like these and share solutions with other attendees!

Organizational Chart Introduction

The following charts are designed to represent the major record structures in each program of CDM+. Listed underneath each major record (Parent) structure are its related record (Child) types. When deleting or archiving Parent records from CDM+, the related record (Child) types will also be removed. Note that some records also have related record types that have additional related records tied to them. For example, when deleting or archiving out Address Records, all of the record types listed below it will be removed, plus all of the related records under Individual Records, Giving Units, and Visitation Records.

Some records have *soft links* related to them. A soft link refers to shared information or reference links tied together. When archiving or deleting records, those records that are soft linked are not deleted or archived. An Employee Record can have a soft link to an Address Record. When an Address Record for an employee is updated, the Employee Information Record is also updated. However, when an Address Record is deleted or archived, the related Employee Information Record will not be removed.

MEMBERSHIP

- **Address Records**
  - Address Phones/E-Mail
  - Address Groups
  - Address Other Information
  - Individual Records (also a Parent)
  - Giving Unit Records (also a Parent)
  - Visitation Records
  - *Soft Links*
    - Vendor Records
    - Payroll Records
    - Customer Records in Accounts Receivable
- **Individual Records**
  - Individual Phones/E-mails
  - Individual Groups
  - Individual Other Information
  - Pastoral Records
  - Visitation Records
  - Attendance Records
  - Event Registration Records (also a Parent)
    Soft Links
    - Giving Unit Record
- **Pastoral Records**
- **Visitation Records**
- **Preaching Aids**
- **Media Ministry**

ATTENDANCE

- **Attendance Records**
- **Visitor Records**
  - Visitor Phones/E-mails
  - Visitor Groups
  - Visitor Follow-up
  - Attendance Records
- **Attendance History Records**

CONTRIBUTIONS

- **Giving Units Records**
  - Groups
  - Contribution Records
  - Estimates/Pledges
- **Contribution Records**
  - *Soft Links*
    - Memorial Gifts
    - Ledger Entries
- **Contribution History Records**
- **Estimate/Pledge Records**

MEMORIAL GIFTS

- **Gift Designees**
  - Gifts Given
  - Gifts Used
- **Gifts Given**
- **Gifts Used**

STATISTICS
- **Event Statistics**
- **Class Statistics**

ACCOUNTING

Accounts Payable
- **Vendor Records**
  - Invoices
  - Payments
  - Recurring Transactions
- **Purchase Orders**
- **Invoices**
- **Recurring Transactions**

Accounts Receivable
- **Customer Records**
  - Invoices
  - Payments
  - Statements

Ledger
- **Ledger Entries**
- **Bank Reconciliation**
- **Chart of Accounts**
- **Budgets**

Payroll
- **Employee Information**
  - Payroll Records (also a Parent)
  - Pay Items
  - Pay Deductions
  - Sick/Vacation Time
- **Payroll Records**
  - Pay Items
  - Pay Deductions
  - *Soft Link*
    - Ledger Entries
- **Other Deductions**
- **Sick/Vacation Time**

EVENT REGISTRATION
- **Event Records**
  - Activities
  - Registration Notices
- **Registration Records**
  - Contacts (if camp)
  - Other Information
  - Activities
  - Payments
  - Notices

ROOMMATE FACILITIES MANAGER
- **Events**
  - Resources (also a Parent)
  - Rooms (also a Parent)
  - Contacts
  - Instances of Events
- **Resources**
  - Default Room Assignments
- **Rooms**
  - Configurations
- **Contacts**