

We are here to Keep Adding Value!

# Purging and Archiving Notes

Why Purge? Space may be cheap, but it is not unlimited. With good indexing, a cache database is scalable but eliminating unnecessary records increases efficiency. Purge strategies can vary by customer but are generally driven by: Space needs/Database growth factor, Performance and Reporting/Workflow requirements. It is highly recommended to develop a plan before you experience space or performance issues.

## There are three different types of purging:

1. Events – KAV recommends 30 to 60 days in case there are any events that need to be replayed. This setting is found in the ETM System Profile, D35100.
2. Tasks – Tasks can be purged from the system once it's been identified they are no longer beneficial to retain.
3. Notes – System generated notes are typically not needed to be retained and can be set to purge with the task.

## There are two different ways to identify tasks to purge:

1. Identify specific tasks that bring no value – tasks are complete, have had no user actions and no expected reporting value – or that no longer need to be maintained in the system and purge the tasks that meet the specified criteria.
2. Set the Anticipated Purge Date (T+# of days) at the task definition template level to automatically allow the eligible tasks to be included in the purge process.

Edit Entry ETM System Profile in Dict 35100 (ETM System Profile)		1	DICF.A
Purge Events (# days):			
Allow Automatic Purging of Events?: Y			
Purge Tasks (# days):			
Edit Entry Deleted in Dict 35111 (ETM Task Status)		1	DICF.A
Name: Deleted			Req
Number: 1			Req
Mnemonic: D			Req
Library Entry ID: IDK-L-MDE-35111-D			Req
Status Type: DELETED			Req
Purge Tasks (# days): 1			

## Archiving notes on purged tasks:

With the ability to archive notes, now the tasks can be purged without the fear of losing important details associated with the account. The task note type can be flagged in D35172, to automatically include any note with the applicable note type to be archived when the task is purged. A conversion is needed to identify and archive the notes and once the ETM task(s) has been purged, the notes will be viewable from the Archive Task Notes action code and/or the Archived Notes Preview UI in Task Manager.

Name:	CAR-EDI Billing Specialist
Mnemonic:	CAREDIBS
Add note to DBMS note archive?:	Y

*This is a free option to KAV support clients. We want to provide you with opportunities to be successful in this unique environment. Just submit a KAValry ticket and we will be there to help with purging plans as soon as possible!*



For more information, submit a ticket via KAValry  
Or call: (570) 672-9365  
Email: kvetovich@kav-consulting.com  
Visit: [www.kav-consulting.com](http://www.kav-consulting.com) and **Open a Ticket**