# Data Maintenance and Retention

StrataMax is able to configure various data tables to automatically delete or archive data based on a number of years; this process will reduce the size of database tables and therefore reducing consumption of storage on servers and also backup sizes. By using these features, you can come up with data and document retention periods that balance the needs of the business with and your infrastructure costs.

## Data Health

While *DocMax* provides options to manage storage within the settings, other areas can be managed by configuring a *Dashboard* item called 'Data Health' to automatically delete or archive Lost Buildings, System Logs, Building Files, DocMax documents, Stored Reports and Emails for a number of months/years in which you want the data to be kept for prior to deleting or archiving.

> Archived data is recoverable providing the zip file has not been moved or deleted as this is stored on the client's environment; **charges may apply**. Deleted data is not able to be retrieved in any circumstances.

### Data Health | Security

Access is granted to Administrators; however, access can be granted to other users or groups as well.

1. Search or select *Security Setup*.
2. Right-click *Group or* user name and select *Edit Permissions*.
3. To locate the required permission, type 'Edit data health settings' in the bottom-left field and click the *Filter* button*.*
4. Once you have located the required permission, right-click it and set to*Allow.*

### Data Health | Dashboard Setup

1. Open *GLMax* and search or select *Dashboard*.

2. Click the *Pencil* icon to open the setup.
3. Click the *User / Groups* drop-down and select the Administrator group or applicable user / Group.
4. Click the *Add Dashboard Item* button.
5. Select 'Data Health' from the drop-down list and update information to suit your requirements.
6. Click the *Save* button.

## Data Health | Dashboard Results

Please take extreme care and consideration before setting any timeframes for these items as it could lead to data being deleted that may be required at a later date. You may wish to consult your IT Specialist before configuring.

1. Open **GLMax** and search or select **Dashboard**.
2. Locate the 'Data Health' graph and click on it to open the 'Data Health Report' screen.
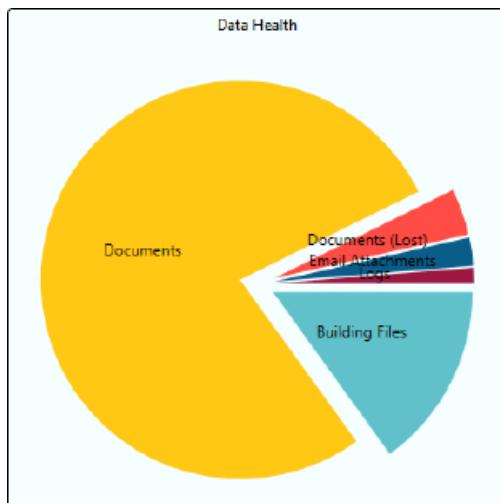


## Data Health | Configuration

In the 'Data Health Report' screen, click the *Configuration* button (cogwheel) in the top right corner.

- Any configuration items that are defaulted to '0' will be disabled and the schedule will not run for these items.
- Any defaults previously set by Support for Database Backups, Stored Reports or Email retention will be migrated to here and can be modified.
- Log retention will default to the values in the below screenshot if not configured already.



### Buildings

- No. of months to keep backups: Default is '13', but can be amended to however many is required.
- No. of months to keep lost buildings (delete lost buildings automatically): Default is '0', but can be amended to however many is required. When a lost building is deleted, the documents for the lost building will also be deleted.
- No. of years to keep banking files: Default is '0', but can be amended to however many is required.

# Financial

- No. of years to keep historical financial data: Default is '50', but can be amended to however many is required.

# Documents

*Stored Reports* includes documents generated from StrataMax including lot specific reports as well as Financial Statements from month end rollover. By default Stored Reports will not be set to delete. Once archived the data is stored within the StrataMax network share file system, and can be restored if required to the database upon request from StrataMax Technical Support.

Documents such as *Levy Notices*, *Levy Arrears*, *Certificates*, *Owner Tax Info Reports* and *Utility Bills* are stored into DocMax. Documents in DocMax can automatically be deleted based on the expiry date. The deleted documents are archived to a zip file; contact our Support Team if access to an archived file is required. DocMax profiles can assist in automatically populating an expiry date/ Document Expires date. Refer to the "Default Expiry Years" section via DocMax Settings. The "Remove from Portal After date" field is a separate field, which controls when the document is removed from the StrataMax Portal, not when it is deleted in DocMax.

> Please see recommended steps below for further details and to avoid potentially deleting documents that should be kept. **Once documents have been deleted these cannot be restored by StrataMax**.
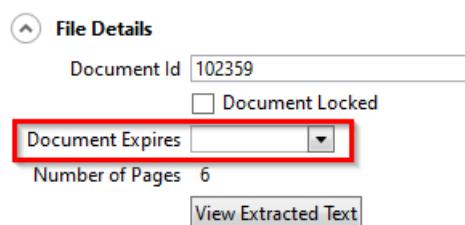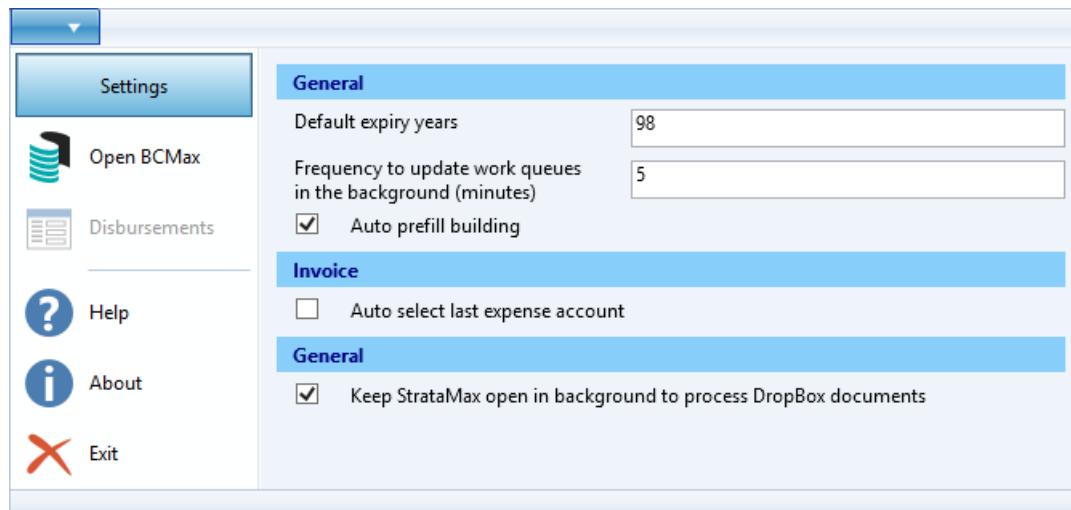
**Recommended Steps**

1. Use an *Advanced Search* to locate all documents by their Document Expiry Date. Review the documents, and if necessary, change the 'Document Expires' date; using the *Advanced Search* with the *Results Layout* set to 'Show Results with Properties', you can update up to 1000 documents at the same time. If you need help updating an even larger number of documents to a single date, email the details to *support@stratamax.com*.



2. Review the current *Profiles* that are set up to ensure the appropriate selection has been made for the field *Document Expiry*. What is set here is used when documents are saved to DocMax with the profile selected. If *Document Expires Date* is selected, no date will be set and the document will not be deleted. If no date set is selected, the 'Default Expiry Years' will be used.
3. In the DocMax Settings screen, set the *Default Expiry Years* (this will be used for documents added into DocMax not using a *Profile* and for documents added using a *Profile* with the *Document Expiry* as 'Not Set').
4. Create a *Saved Search* that should be regularly monitored by a user to review what documents will delete in the coming days/weeks and make changes if required. The below is an example of fields that could be used, but you should set the value for *Document Expiry Date* to suit your own needs.

### Emails

- No. of months of emails to keep: Emails sent via **Communication**. Emails will include any StrataMax generated emails sent to owners, agents, creditors etc. By default, emails will not be set to archive.

### Logs (System)

Logs contain date & time stamped information of actions taken within StrataMax by all users and is sometimes used to check what user may have performed a specific action. System logs can be checked in **Log Viewer**. By default, system logs will delete after 2 years with the exception of **Log Viewer** records, which are retained for 10 years.

- No. of months to keep trace logs:
- No. of months to keep info logs:
- No. of months to keep warning logs:
- No. of months to keep error logs:

# Delete Bank Statement Files

Banking statement files downloaded from your banking institution and processed in **Process Bank Statements** can now be deleted after import. This option is to not store the banking files once they have been imported, removing sensitive data from the file system. This is a Support Only tool, please contact our Support Team to configure this option,