

GeorgiaFIRST Financials Version 8.9 Data Retention and Archiving Policy

One of the key initiatives in improving (and maintaining) system performance is a data archiving program. Each day many of our system tables grow by thousands of rows and our largest tables have millions of rows of data.

GeorgiaFIRST Financials has adopted the following Data Retention Policy in order to maintain system performance and efficiency:

- Data to be available online: Current Fiscal Year + 3 prior Fiscal Years

Archiving Dates	FY Data available Online	FY Data Moved to History Tables
December, 2009	2006, 2007, 2008, 2009	2002, 2003, 2004, 2005
December, 2012	2009, 2010, 2011, 2012	2006, 2007, 2008
December, 2013 (Tentative)	2010, 2011, 2012, 2013	2009

Mapping of Archived Database Tables to AP and GL History Tables

The following lists show the archived AP and GL database tables and the mapping to the corresponding history tables.

AP Tables

AP Payment (Archive Template - AP_PYMNT)	
Active Database Table	History Table
PAYMENT_TBL	AP_ARC_PYM_TB_H
PAYMENT_RCN_TBL	AP_ARC_PYM_RC_H
PYMNT_ADVICE	AP_ARC_PYM_AD_H
AP Voucher (Archive Template – AP_VCHR)	
Active Database Table	History Table
BCH_XREF_EXT	AP_ARC_BCH_XR_H
DISTRIB_LINE	AP_ARC_DIST_L_H
DISTRIB_LINE_NP	AP_ARC_DIST_N_H
PYMNT_VCHR_MSG	AP_ARC_PY_MSG_H
PYMNT_VCHR_WTHD	AP_ARC_PYM_WT_H
PYMNT_VCHR_XREF	AP_ARC_PYM_XR_H
VCHR_ACCTG_LINE	AP_ARC_VCH_AC_H
VCHR_DOCSEQ_HDR	AP_ARC_VCH_DO_H
VCHR_FRGH_CHRG	AP_ARC_VCH_FR_H
VCHR_LINE_TXGEO	AP_ARC_VCH_TG_H
VCHR_LINE_WTHD	AP_ARC_VCH_WT_H
VCHR_LN_EXS_DTL	AP_ARC_VCHL_E_H
VCHR_LN_TX_DTL	AP_ARC_VCH_TX_H
VCHR_MISC_CHRG	AP_ARC_VCH_MS_H
VCHR_RECV_MTCH	AP_ARC_VCH_RM_H
VCHR_SALETX_CHG	AP_ARC_VCH_ST_H
VCHR_USETAX_CHG	AP_ARC_VCH_UT_H
VCHR_VNDR_IBANK	AP_ARC_VCH_VI_H
VCHRLN_MISC_CHG O	AP_ARC_VCHL_M_H
VOUCHER_LINE	AP_ARC_VCH_LN_H
VOUCHER	AP_ARC_VOUCH_H
VOUCHER_HIPAA	AP_ARC_VCH_HP_H
VCHR_VNDR_BANK	AP_ARC_VCH_VB_H
VCHR_VNDR_INFO	AP_ARC_VCH_VN_H

GL Tables

GL Journals (Archive Object - GL_JOURNAL)	
Active Database Table	History Table
JRNL_HEADER	JRNL_HDR_H
JRNL_LN	JRNL_LN_H
JRNL_VAT	JRNL_VAT_H
JRNL_CF_BAL_TBL	JRNL_CF_BAL_H
JRNL_IU_ANCHOR	JRNL_IUAC_H
OPEN_ITEM_GL	GL_OITEM_H
GL Detail Ledger (Archive Object -GL_LEDGER)	
Active Database Table	History Table
LEDGER	LEDGER_H

Criteria Used and Impacts of Archived Data

1. What AP transactions are archived?
 - AP Payments
 - AP Vouchers
2. What criteria are used for selecting AP transactions to archive?
 - Payments (archived first)
 - Payment must be **posted and reconciled**.
 - Vouchers
 - Voucher must be **posted and paid**.
 - The related payment must be archived in order for the voucher to be available for archiving.
3. What changes can you expect in AP once the data is archived?
 - **Online Inquiry**
 - Vouchers and payments that have been archived will no longer be available for online inquiries or searches.
 - **Control Groups**
 - Control groups will still exist. However, the related vouchers that existed within the control groups that have been archived will no longer appear within the control group.

Assignment		Accounting	Vouchering Options	Vouchers	Tax Options
Unit:	21000	Group:	000221		
Control Totals <input type="checkbox"/> Run a Tape Gross Amt: 47,289.74 Nbr of Vouchers: 66		Actual Totals Gross Amt: 2,507.00 Nbr of Vouchers: 3		Differences Gross Amount Difference: 44,782.74 Voucher Totals Difference: 63	
Status Verified		Assignment Assigned to: LRSMILEY Linda Smiley Assigned: 06/30/06 10:17AM Due: 06/30/06 4:53PM Completed:		Voucher Numbering <input type="checkbox"/> Reserve Voucher Numbers Starting From: 00000000	

- As seen in the above example, this control group has 3 of the original 66 vouchers that did not meet the archiving criteria and remain within this control group.
- **Bank Reconciliation**
 - No impact should be expected since only reconciled payments should have been archived. All old outstanding payments should still be available.
- **Reports and Queries**
 - Reports and queries that contain AP and GL data will no longer reflect the transactions that have been archived.
 - Some of the impacted reports and queries include, but are not limited to:
 - Grant Budget Progress Reports (BORRG043 and BORRG044)
 - AP History Report (BORRY007)
 - Vendor Payment History Report (BORRY002)